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April 20, 2017 1901
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April 6, 2017 1904
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March 18, 2017 1908

March 15, 2017 1909
October 4, 2017 1910
October 14, 2017 1911
October 28, 2017 1912
November 4, 2017 1913
November 6, 2017 1914
November 11, 2017 1915
December 2, 2017 1916
December 18, 2017 1917
December 19, 2017 1918
December 24, 2017 1919
December 27, 2017 1920
December 29, 2017 1921
February 1, 2018 1922
February 2, 2018 1923
February 5, 2018 1924
February 8, 2018 1925
February 20, 2018 1926
February 28, 2018 1927
March 13, 2018 1928
March 16, 2018 1929
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Article 1, 2018 1931
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April 9, 2018 1937
April 10, 2018 1938
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April 13, 2018 1940
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April 16, 2018 Round One 1942
April 16, 2018 Round Two 1943
April 20, 2018 1944
April 24, 2018 1945
April 26, 2018 1946
May 7, 2018 1947
May 26, 2018 1948
May 28, 2018 1949
May 24, 2018 1950
June 21, 2018 1951
July 6, 2018 1952
July 9, 2018 1953
July 12, 2018 1954
July 16, 2018 1955
July 21, 2018 1956
July 22, 2018 1957
July 31, 2018 1958
August 3, 2018 1959

August 6, 2018 1960
Search updates 1961
November 9, 2018 1962
November 12, 2018 1963
November 15, 2018 1964
November 18, 2018 1965
November 28, 2018 1966
December 3, 2018 1967
December 31st, 2018 1968
January 22nd, 2019 1969
January 29th, 2019 1970
Introducing Subscriptions 1971
February 8, 2019 1972
February 22, 2019 1973
February 26, 2019 1974
March 4, 2019 1975
March 9, 2019 1976
March 11, 2019 1977
March 12, 2019 1978
March 18, 2019 1979
March 23, 2019 1980
March 28, 2019 1981
April 2, 2019 1982
April 5, 2019 1983
April 10, 2019 1984
April 15, 2019 1985
April 16, 2019 1986
April 18, 2019 1987
April 25, 2019 1988
May 6, 2019 1989
May 13, 2019 1990
June 3, 2019 1991
June 5, 2019 1992
May 15, 2019 1993
June 19, 2019 1994
June 20, 2019 1995
July 12, 2019 1996
June 28, 2019 1997
July 31, 2019 1998
Introducing Version Notes 1999
September 12, 2019 2000
October 3, 2019 2001
October 23, 2019 2002
November 5, 2019 2003
November 8, 2019 2004
Widget 2.0 2005
November 22, 2019 2006
December 10, 2019 2008
December 11, 2019 2009
December 31, 2019 2010
January 9, 2020 2013

January 17, 2020 2014
January 22, 2020 2017
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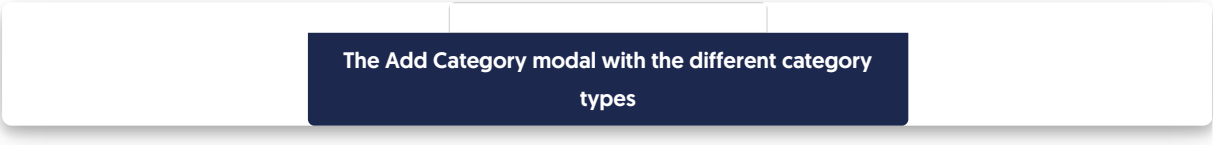
Add a category or subcategory

Last Modified on 12/05/2024 12:52 pm EST

To add a category to your top level content:

1. In the left navigation, go to **Articles**.
2. If it's your first category, select **Add Your First Category**. If you have existing categories, select **+ Add Category** in the **Top Level Content** column.
3. The **Add Category** modal opens. Here you can choose between six category types that change the layout of the landing page. The default is a Default category, which will display articles in a list and subcategories in one of four subcategory display formats.



The Add Category modal with the different category types

4. Once you choose a category type, select **Quick Add** to create the category and return to **Articles** to add more content, or select **Add and Edit** to go to the category editor and customize the category further.

To add a subcategory:

1. In the left navigation, go to **Articles**.
2. In the **Top Level Content** pane, select the top level category where you want to add the subcategory.
3. This will open the category in the right pane. In that pane, select **+ Add Subcategory**, and continue the category creation process.

Content hierarchy
KnowledgeOwl does not limit the number of layers or levels of categories and subcategories in your knowledge base, so if you want more than three layers, go for it! Just be sure to test how it displays in your table of contents so you don't create a monster. Note that blog style and topic display categories do not allow subcategories.

Choose a category type

Last Modified on 05/29/2024 5:27 pm EDT

When you create or edit a category, you can choose between several different types of categories. Category types can be changed at any point in time by editing the category.

The types of categories control :

- How the category landing page appears in the knowledge base.
- How the category looks and functions in the table of contents.
- Whether or not you can have subcategories within the category.
- Whether or not this category will pull and sync content from another knowledge base.
- Whether or not the category will redirect to another web page when viewed.

The six types of categories in KnowledgeOwl are:

- Default
  Displays articles in a simple list. Choose one of four subcategory display formats: title and description, subcategory panels, content list, or icon panels. Default is icon panels.
- Blog style
  Display a paginated list of articles with brief descriptions. Can only contain articles.
- Topic display
  Displays the full text of all articles in a single page. Can only contain articles.
- Custom content
  Create a landing page from scratch like an article. This type of category is available in search.
- Shared content
  Copy and sync a category and all its contents from another knowledge base.
- URL Redirect
  Clicking on this category to view it redirects the reader to another webpage of your choice.

Default categories

Last Modified on 07/10/2024 4:29 pm EDT

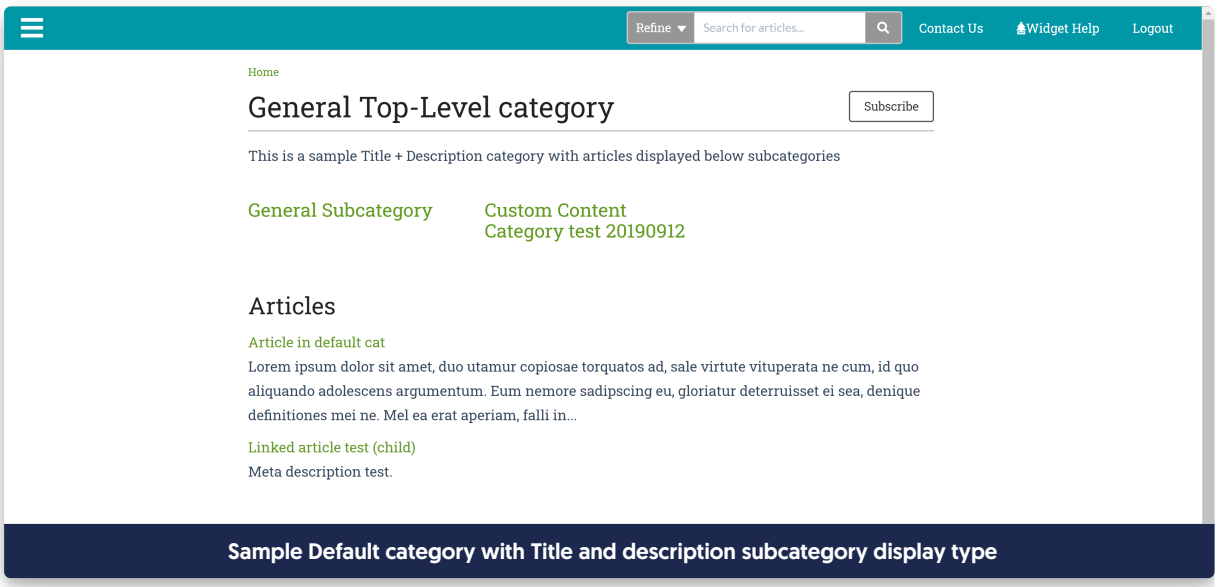
The default category type is the most common choice for organizing and displaying content. You can create both subcategories and articles within a default category.

The landing page for a default category automatically displays the following:

- Full category title
- Category description
- Subcategories (using one of three display types)
- Articles in a simple list with the title and description

The subcategory display types are:

- **Title and description**
  Displays category titles and description in a simple grid format with three categories to a row. Example: Company and product info We have a modified version with subcategories in our knowledge base (we force one subcategory per row): Example: Security and permissions

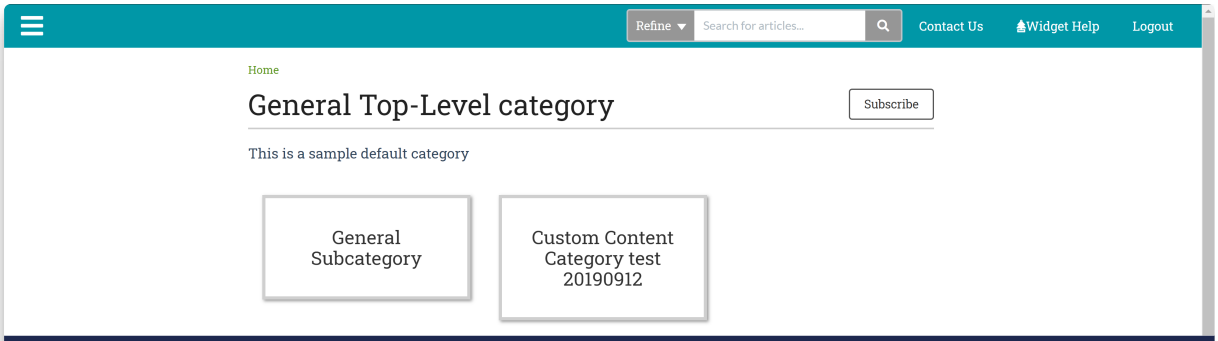


Sample Default category with Title and description subcategory display type

- **Subcategory panels**
  Displays subcategory titles in panels matching the homepage base category panels with three categories to a row. We have modified versions of this in our knowledge base (we force one category per row).

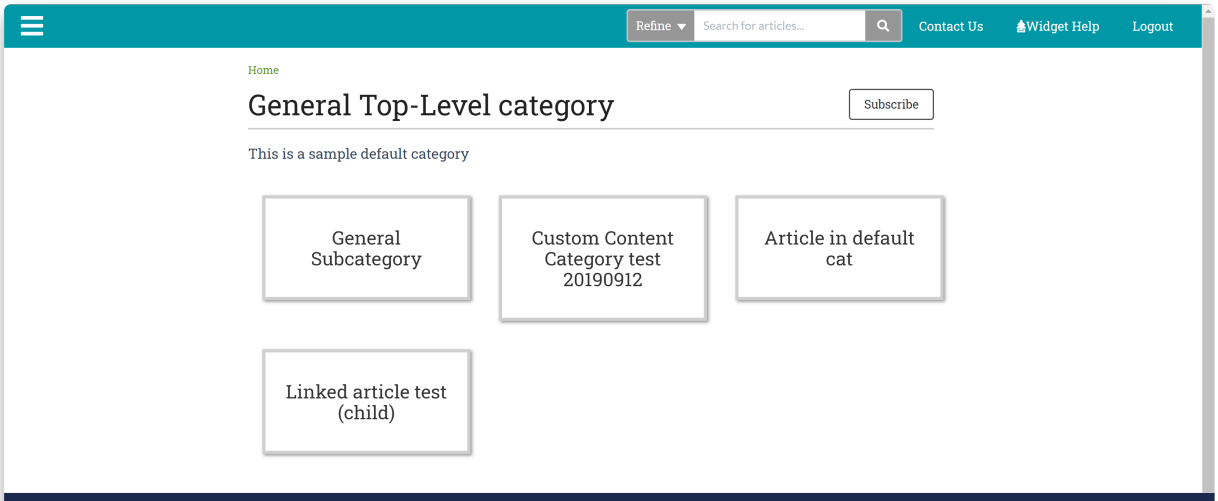
Article Display limitation
When using subcategory panels, articles only show when using inline display for the Article Display options.

So, for example, here is the same category as above with subcategory panels selected, without the inline display selected:



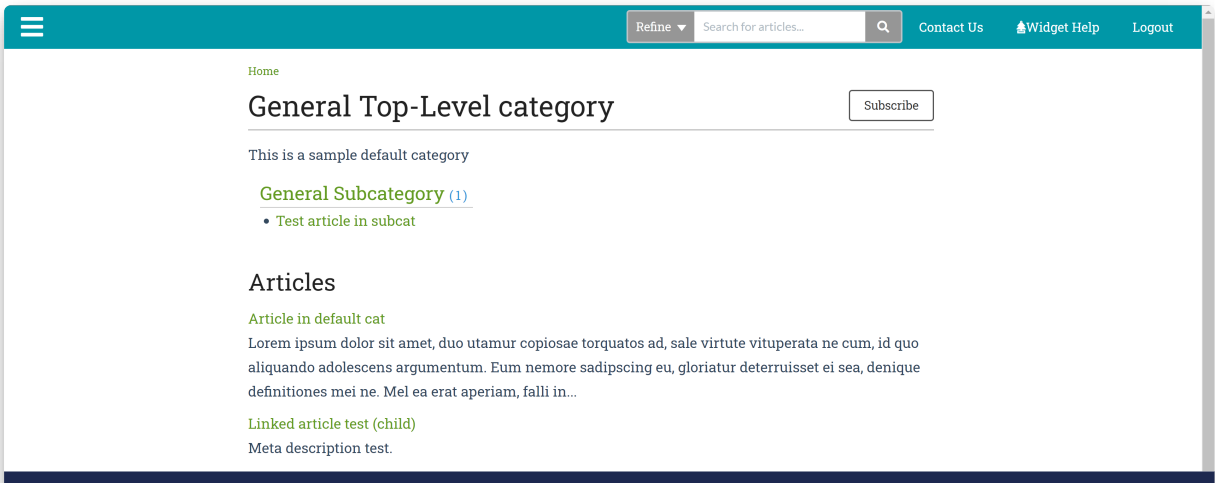
Sample Default category with Subcategory panels subcategory display type

And with the inline display selected, where articles are displayed in the same panels:



Sample Default category with Subcategory panels subcategory display type and article Inline display option

- **Content list**
  Displays the title of each subcategory with a list of links to the first five subcategories or articles in the categories. The total number of subcategories and articles are displayed in parentheses with a link to view all. There is an option to show all child content rather than the first five. Example: Account and billing.

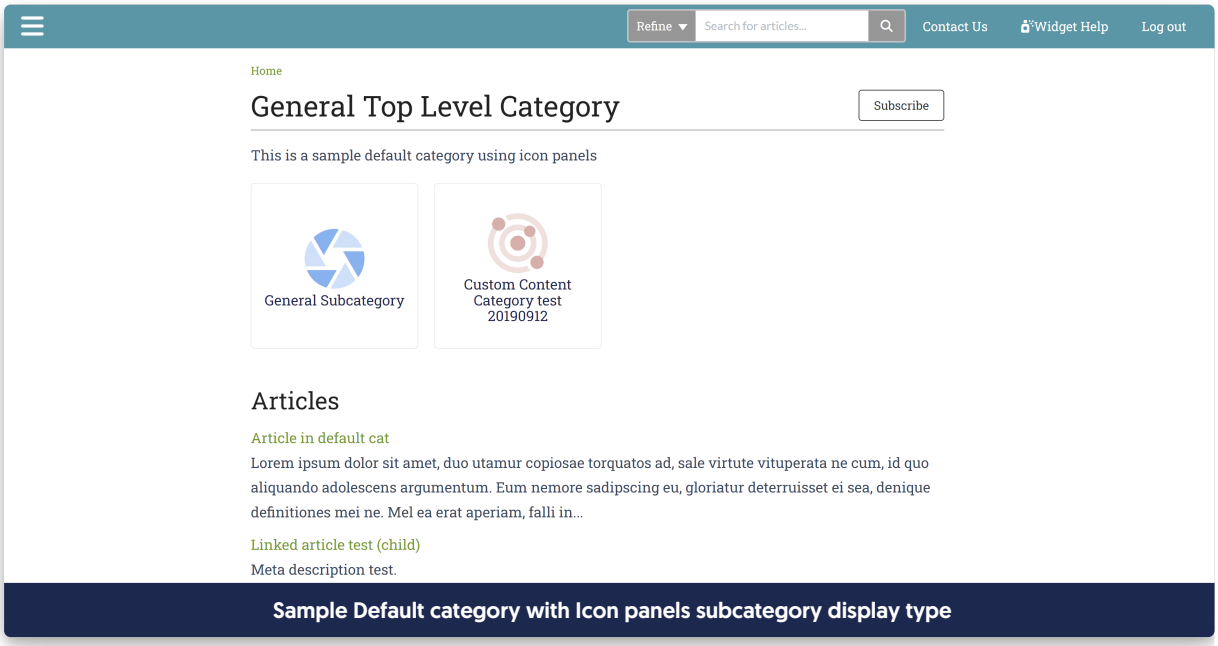


Sample Default category with Content list subcategory display type

- **Icon panels**
  Like Subcategory panels, this display option will display each category in a panel, but it also displays the category's icon. If no icon has been added to the category, we'll display one of four default icons. With this layout, you can set how many categories you'd like to appear per row, limit how many categories to show, and whether to show the category description.

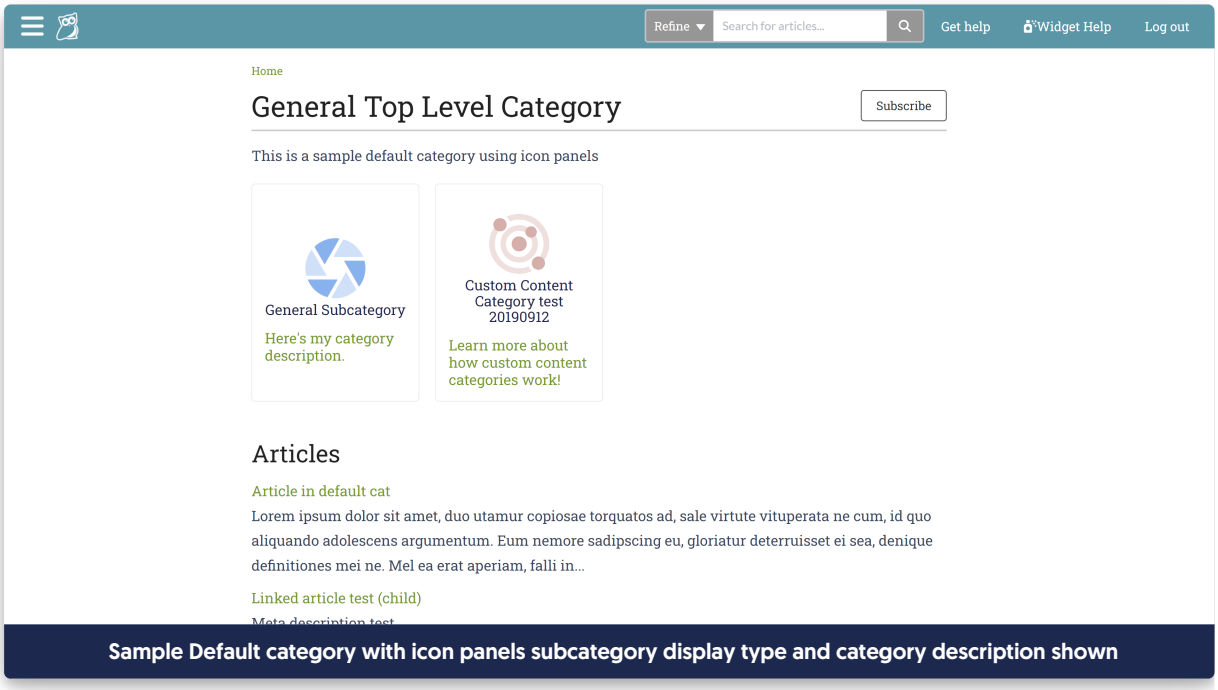
Articles cannot be displayed inline in this setup.

Here's a sample of the layout without category descriptions:



Sample Default category with Icon panels subcategory display type

And with category descriptions:



Sample Default category with icon panels subcategory display type and category description shown

After you set up your category, KnowledgeOwl automatically displays the category's content in the chosen format.

The default settings for a default category are:

- **Icon panel subcategory display type**
- **Toggle option in the table of contents**

If you choose to Quick Add a category, it will have the default settings.

Table of contents appearance

Since default categories generally contain other content, they typically have an expand/collapse icon in the table of contents. See Category appearance in the table of contents for more details.

Topic display categories

Last Modified on 12/05/2024 12:57 pm EST

Topic display categories display the full text of all articles they contain on a single page, like one very long article. Readers can view all the topic display category's articles on a single page, reading it like a book or choosing which articles to read.

Example: Authors

Topic display categories:

- Can only contain articles (not subcategories)
- Can be displayed accordion style, with each article collapsed below its title and clicking the title expands the content
- Can be displayed tabs style, with each article in a different tab at the top of the page
- Can have quick links, or a mini table of contents, at the top of the article that link to each article on the page
- Can have the first article set as an "intro" which will display above any of those controls
- Include their own Display Options to set all of that behavior 😊

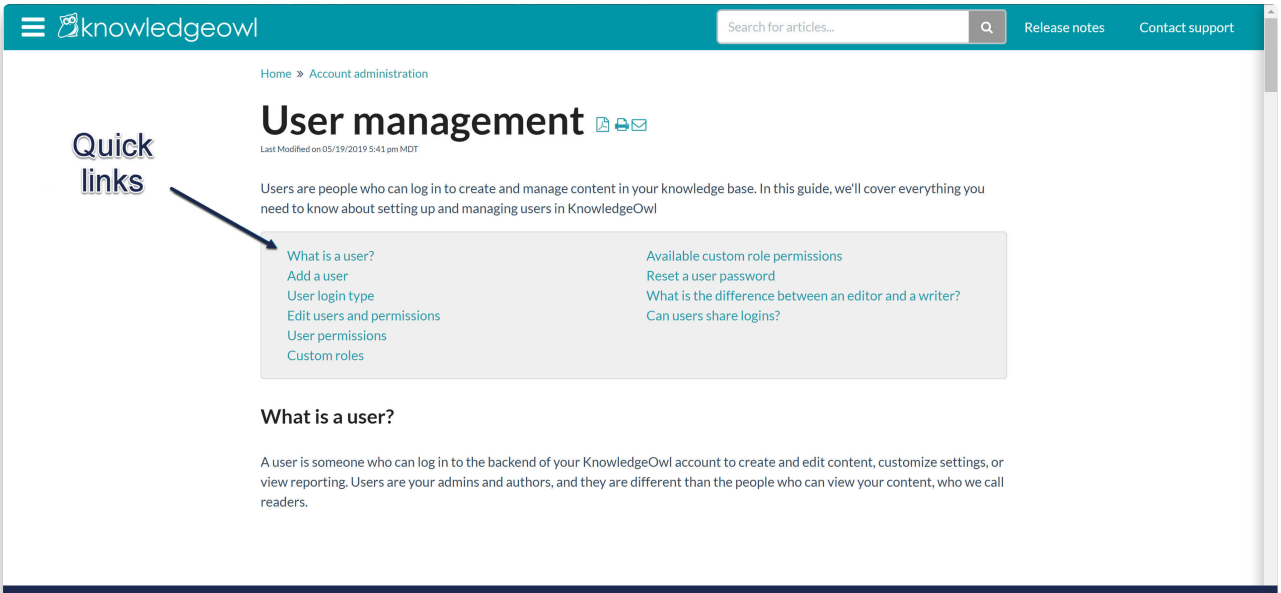
Recommended use cases

Topic display categories are ideal for topics where you want a series of articles presented on a single screen, like chapters from a book or steps in a process. These are great for Frequently Asked Questions (FAQs) or long user guides.

For example, you might have an FAQ page with 20 frequently asked questions and answers. If you set this up using a topic display category, you would create the 20 FAQs as 20 separate articles.

When someone wants to read your FAQs, they can browse to the topic display category and view all the FAQs in one place. However, when someone searches for one of the FAQs, the individual FAQ article comes up in search, giving them the answer immediately rather than sending them to the FAQ page and requiring them to browse to their question.

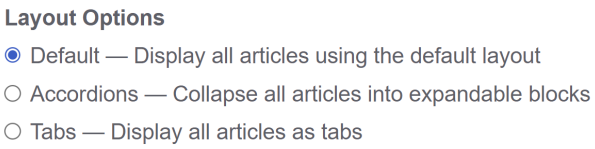
Besides FAQs, longer documentation with multiple steps or sections are often good candidates for topic display categories. Some readers might want to view the full documentation in one place like a guide, whereas others might only need or want help with one section or step. Breaking up the documentation into separate articles in a topic display category allows people searching to get straight to the step or section they need, while people who want to view the documentation in full can use the topic-based category page.



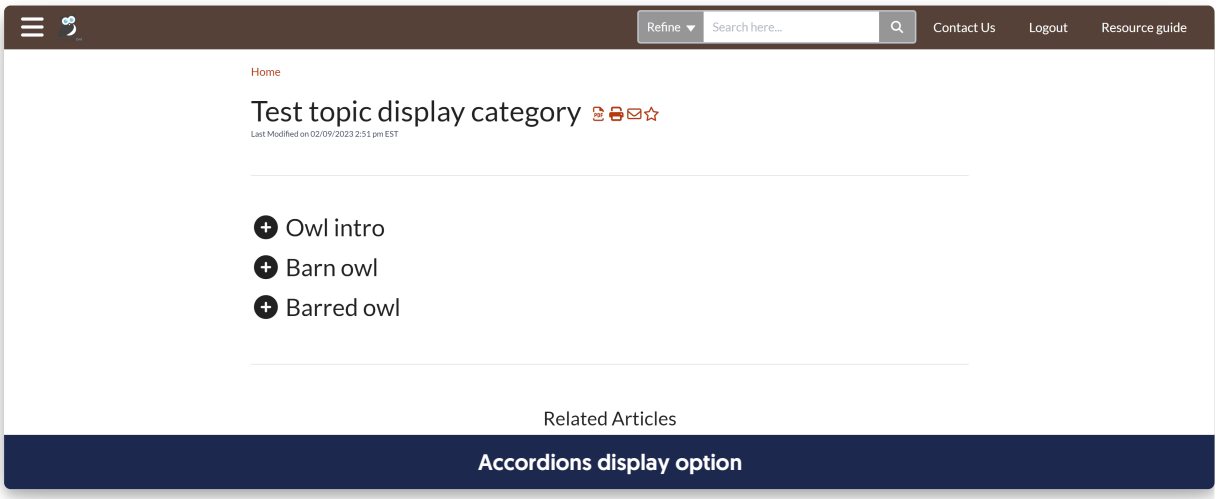
Sample topic display category, using quick links and override article links options

Layout options

There are three available layout options:

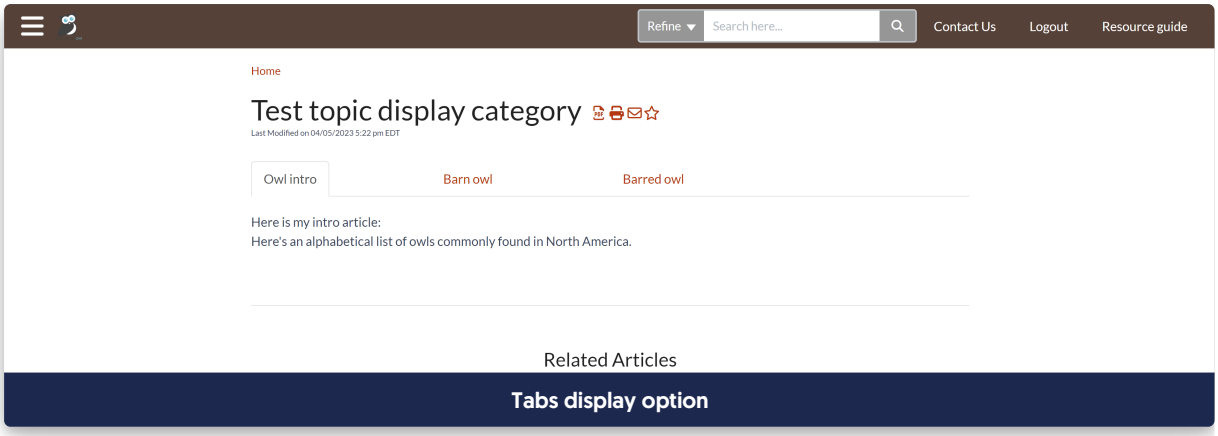


1. **Default: This option will display the full text of all articles in the topic display category.**
2. **Accordions: This option places each article into an expandable block, with the article title displayed as the block heading. The blocks are collapsed and include a + / - icon displayed before them:**



Accordions display option

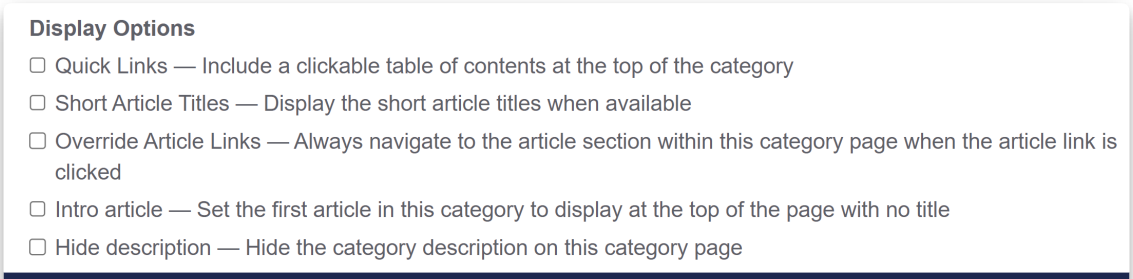
3. **Tabs: This option creates a separate tab for each article, using the article's title as the tab label.**



Tabs display option

Display options

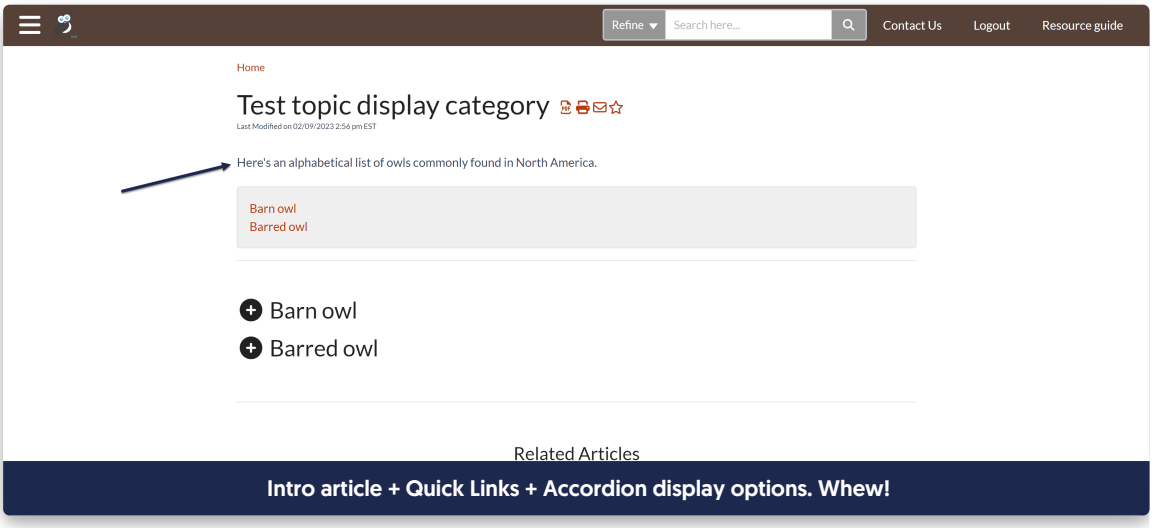
There are five additional display options for topic display categories. You can select as many or as few of these as you'd like:



The Display Options available

1. **Quick Links: creates a clickable Quick Links section, like a table of contents, at the top of the category. Clicking a link jumps you to that section of the category:**
    - **For the Default layout option, this will scroll you to the article.**
    - **For the Accordions layout option, it will expand the accordion and scroll you.**
    - **For the Tabs layout option, this will navigate to the appropriate tab.**
2. **Short Article Titles: When this box is checked, if the articles in this category have short titles, those will be used for:**
    - **The article's title (for Default this adjusts the title as it displays; for accordions it adjusts the accordion text; for tabs it adjusts the tab label)**
    - **The article's Quick Links link, if selected**
3. **Override Article Links: By default, articles in topic display categories can also be accessed as standalone articles from search.**
    - **Checking this box means that any time a link for this article is clicked (permalink, search result, and so on), it will open the topic display category with this article open/visible instead. This can be useful if you want to force people to view the content in-context.**
    - **Leave this box unchecked if you also want the article to appear as a standalone article.**

4. **Intro Article:** You can check this box to set the first article in your topic display category to be an "intro article".
    - The intro article is displayed at the very top of the category with no article header, immediately under the category header. If you've used the Accordions or Tabs layout options or the Quick Links display option, the intro article will appear above those. With this option selected, reorder the articles to change which one is used as the intro. Here, we've used the option so that our intro article text displays above our other controls:



> The intro article title will only be hidden in the topic display category and its PDF. It will be displayed in the Standard PDF and Custom PDF exports. And if the category is set up to display articles as standalone articles, too (you don't have the Override Article Links option checked), the title will display normally in the standalone article, too!

5. **Hide description:** By default, the topic display category page will display the category description between the category's title and the rest of the content. Check this box to hide that description. We find this especially useful when you're using the Intro article, since usually the Intro article is more detailed than the category description!

Table of Contents options

As with other categories, you have the option to set whether a click in the table of contents will Toggle the category open/closed in the table of contents or Navigate to it. You can also choose to Hide contents of the category. See Customize category behavior in the table of contents for more details.

Table of contents appearance

Since topic display categories generally contain other content, they typically have an expand/collapse icon in the table of contents. See Category appearance in the table of contents for more details.

PDFs

Because topic display categories display all of their articles' content, they also get their own PDFs. When you update an article in a topic display category PDF, you'll need to resave the category itself to update its PDF.

You'll see a warning message across all articles in the category once this occurs:



As well as in the category itself:

Once you resave the category, the category's PDF automatically updates.

Blog style categories

Last Modified on 12/05/2024 1:00 pm EST

The blog style category displays articles in a similar way to a blog - reverse chronological order and paginated.

Example: Release Notes

The blog style category:

- Can only contain articles
- Does not display its articles in the table of contents
- Can display 5, 10, 15, or 20 articles per page (the default is 10)
- Can display articles in reverse chronological order OR in the same set order as the application (the default is reverse chronological)
- In the article display, if a meta description exists for the article, that is used for the description. Otherwise, the first ~250 characters of the article body text are used.
- Has a special icon in the table of contents, which looks like a speech bubble (open the table of contents here and look at the **Release notes** category to see it!)

If your category uses reverse chronological order, it will sort your articles by:

- Date published, if it exists, with most recently published at the top
- Date created, if no date published exists

Recommended use cases

Aside from blog posts, this category type is particularly useful for announcements, such as:

- Changes
- Release notes
- Newsletters

It gives readers the chance to browse through topics while keeping the most recent articles at the top. We use this format for our own Release Notes.

Sample blog style category layout, using reverse chronological order

Table of contents appearance

As noted above, blog style categories have a different icon displayed in the table of contents. See Category appearance in the table of contents for more details.

Shared content categories

Last Modified on 05/29/2024 5:28 pm EDT

The shared content category allows you to pull in and sync the content from a category in a separate knowledge base. You must have access to both knowledge bases to set up this kind of category.

This category type is useful when you are maintaining separate knowledge bases and have content that needs to be shared between them.

For more information on how syncing works, refer to Sync behavior in shared content categories.

Table of contents appearance

Shared content categories take on the table of contents display based on the category's overall type (default, topic display, blog, URL redirect, etc.) See Category appearance in the table of contents for the different icons.

Custom content categories

Last Modified on 05/29/2024 5:28 pm EDT

Custom content categories allow you to create your category landing page from scratch, much like an article. Like an article, custom content categories are included in search results. A custom content category is both an article and a category.

If the category has content, there are two display options, controlled using merge codes:

1. [template("content-list")]
   The template content-list merge code will display subcategories in content list format.

2. [template("panel-list")]
   The template panel-list merge code will display subcategories in subcategory panel format.

Both merge codes display a simple list of articles with titles and description below the subcategories.

Table of contents appearance

Custom content categories will show up in one of two ways in the table of contents:

- If they contain additional content (like subcategories and articles), they'll get have an expand/collapse icon like default and topic display categories.
- If they don't contain any additional content, they'll use the solid icon that URL redirect categories use.

See Category appearance in the table of contents for more details.

Recommended use case

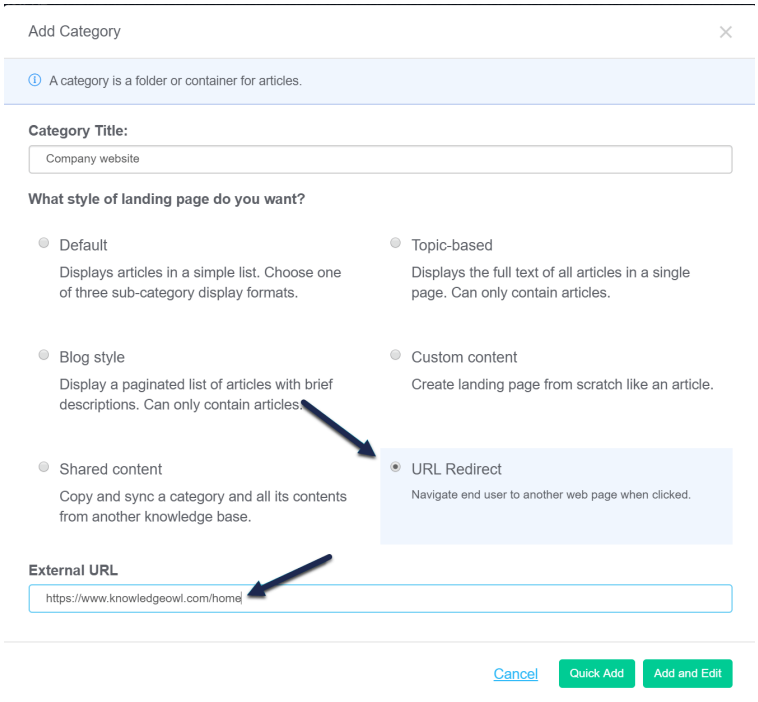
Custom content categories are great when you want total control over your category's look and feel, or when you have a page of content you'd like readers to be able to subscribe to receive notifications on updates.

URL redirect categories

Last Modified on 07/10/2024 4:31 pm EDT

You can use URL redirect categories to include a category-styled link to other URLs, both within and outside of KnowledgeOwl.

When you use a URL redirect category, KnowledgeOwl does not show the content in the category; instead, it loads the URL specified in the URL redirect.



Once you save the category, you have the option to open the link in the same tab or a new tab.

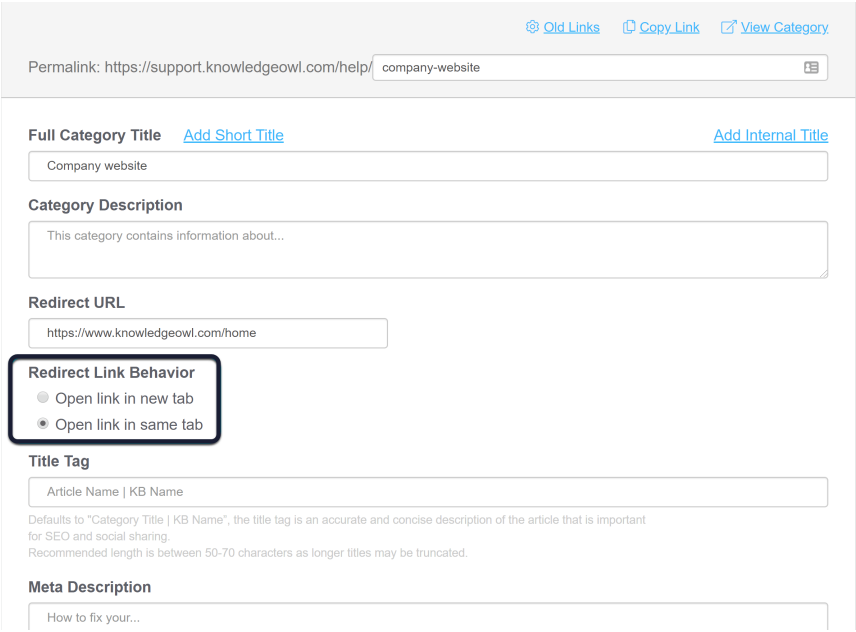


Table of contents appearance

Since URL redirect categories generally don't contain content, they don't generally show an expand/collapse icon in the table of contents. See Category appearance in the table of contents for more details.

Recommended use cases

URL redirect categories are a great solution when you want to provide a link to your company intranet, company website, or partner websites, and you want that link to appear in the table of contents, homepage, or category landing pages, just like another category.

Example: go to Company and product information and click the **Company website** link.

Category appearance in the table of contents

Last Modified on 05/29/2024 5:27 pm EDT

KnowledgeOwl displays links to categories in the table of contents. The category type and contents can affect its appearance:

All category types include a right-pointing chevron or arrow until they are expanded, then it switches to a down-pointing chevron or arrow.

Blog-style categories have a different icon, which looks like a talking speech bubble.

Non-category links generally show up differently:

- If the option to add a homepage link to to the table of contents is checked in **Settings** > **Basic**, Home is displayed with a house icon.
- If the option to add a link to the Glossary is checked in **Settings** > **Basic**, Glossary is displayed with a book icon.
- If the option to add a link to the full PDF download is checked in **Settings** > **Basic**, the Full PDF download is displayed with a PDF icon.

Here's a sample of what you might see with differing categories:





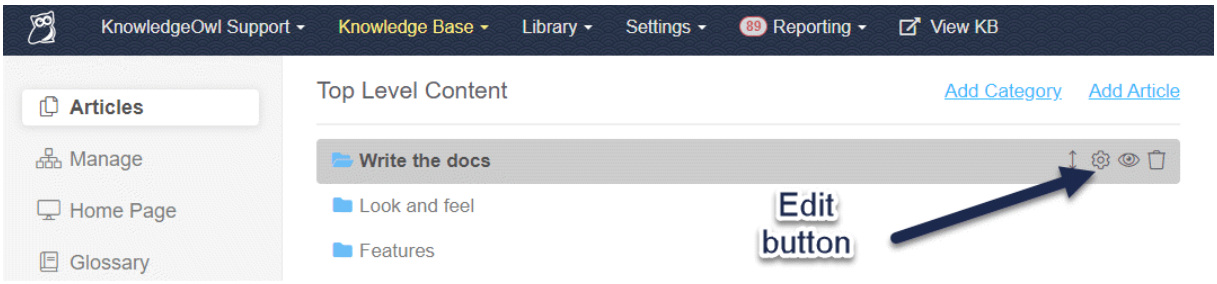
In this knowledge base, we use plus (+) and (-) icons and show a different icon if the category contains no content. If you'd like that same look and feel, see Change the icons used in the table of contents for how we did it.

Edit a category

Last Modified on 05/29/2024 5:28 pm EDT

To edit an existing category:

1. Go to **Knowledge Base > Articles.**
2. Hover over the category you want to edit.
3. Select the Gear icon / **Edit.**



4. KnowledgeOwl opens the category editor.

Internal note

Last Modified on 11/12/2024 3:04 pm EST

Sometimes, you need a place to leave notes for other authors (or yourself) that isn't the Version Notes field. This might include notes on who the subject matter expert is, or that if you update this article, you should also update another article, or some type of quality control note (such as Article Confidence levels if you use KCS).

This type of note is exactly what we designed the **Internal Note** field for.

Internal notes:

- Are notes you want front-and-center when you or other content creators are editing a given article or category.
- Are displayed only in app.knowledgeowl.com, not to your readers.
- Accept very simple HTML markup, so you can include hyperlinks and lists.
- Will be displayed at the top of ALL versions of the article.
- Are available in the Manage Articles CSV export.
- If used in a template article, will be copied to new articles created from that template.
- If in an existing article, will be copied when a new article is created from that existing article.

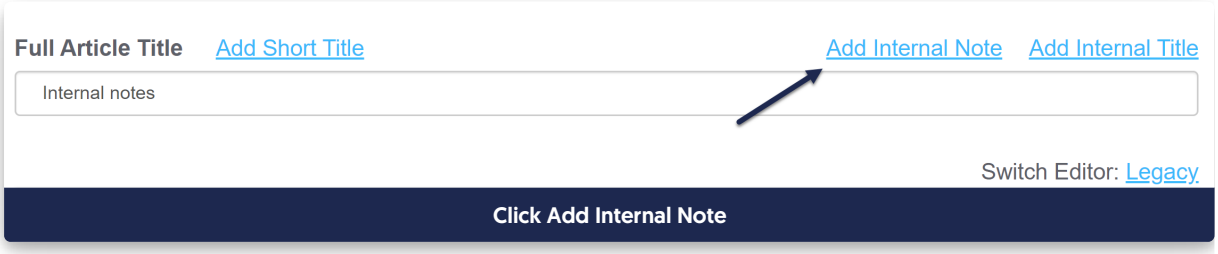
Add an internal note

Authors with the default Editor or Writer role can add internal notes. If you're using a custom role, you'll need to have the **Internal Notes** Permission to Create new internal notes.

Authors who don't have permissions to create, edit, or delete internal notes will still be able to see internal notes created by other authors who do.

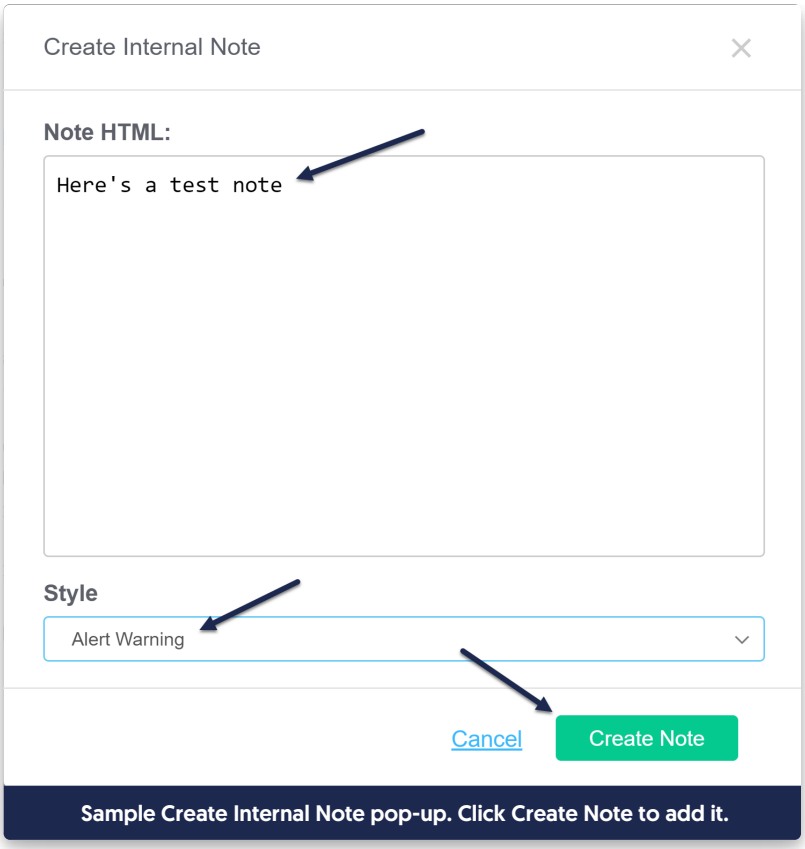
To add an internal note:

1. Select the **Add Internal Note** link to the right of the title:



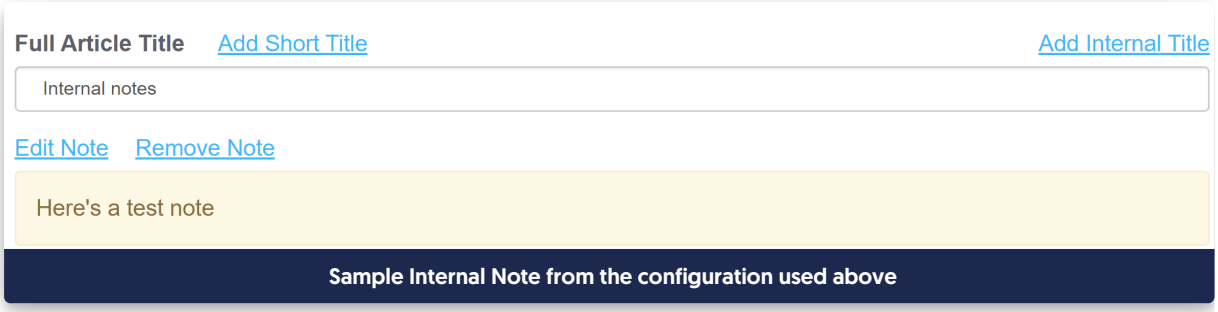
2. Add the HTML you want to use for your note. If you're just putting in regular sentences, you don't need to add HTML, but you can use it for formatting lists, hyperlinks, and so on.

3. Select the style you want to use for your note from the dropdown; we default to Alert Info. Here, we've added a one-line note and selected the Alert Warning style.



Sample Create Internal Note pop-up. Click Create Note to add it.

4. Select **Create Note**.
5. This creates the note and displays it using the style you selected between the title and the editor. You do not need to resave the article itself for the note to be saved.



Sample Internal Note from the configuration used above

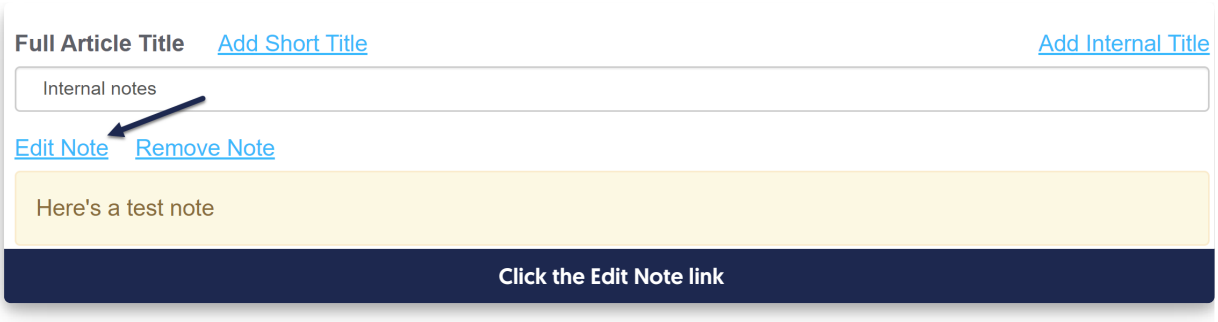
Edit an internal note

Authors with the default Editor or Writer role can edit internal notes. If you're using a custom role, you'll need to have the **Internal Notes** Permission to Edit internal notes.

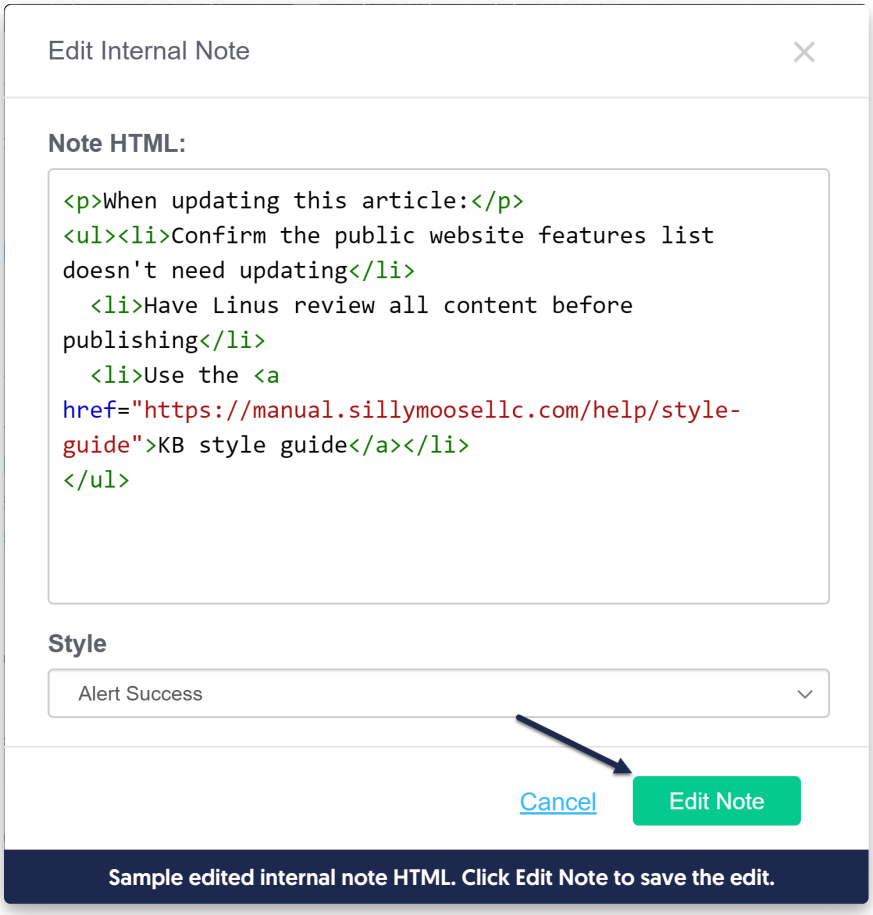
Authors who don't have permissions to create, edit, or delete internal notes will still be able to see internal notes created by other authors who do.

Once an internal note exists, you can edit it to make updates. To do so:

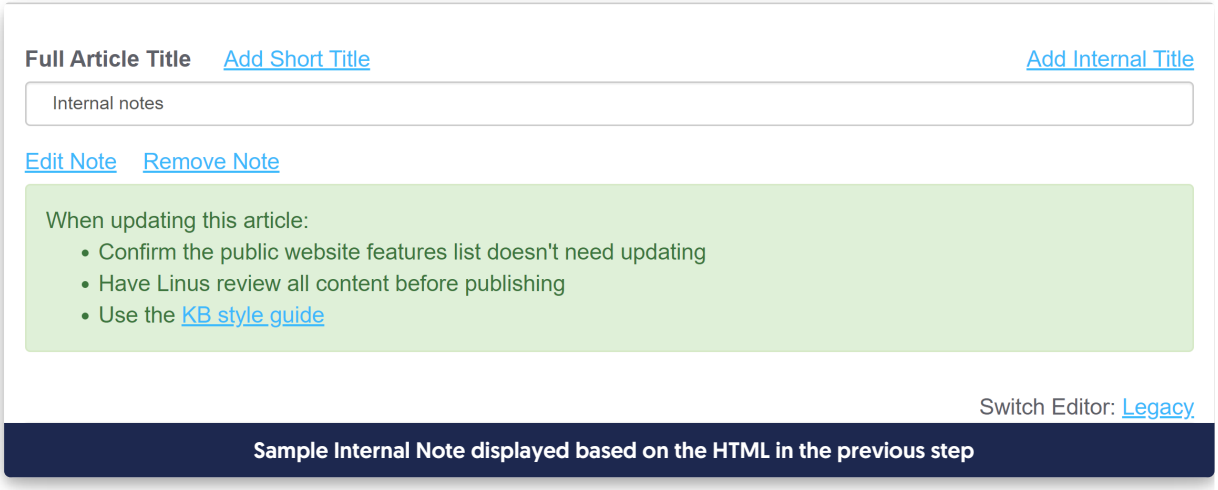
1. Select the **Edit Note** link that appears just above the note:



2. **Edit the HTML or change the style as you'd like. Once you're done making changes, select Edit Note to save your changes. Here, we've added a more complex note with a list:**



3. **The note updates immediately based on the changes you made. You do not need to resave the article or category itself for the note to be saved.**



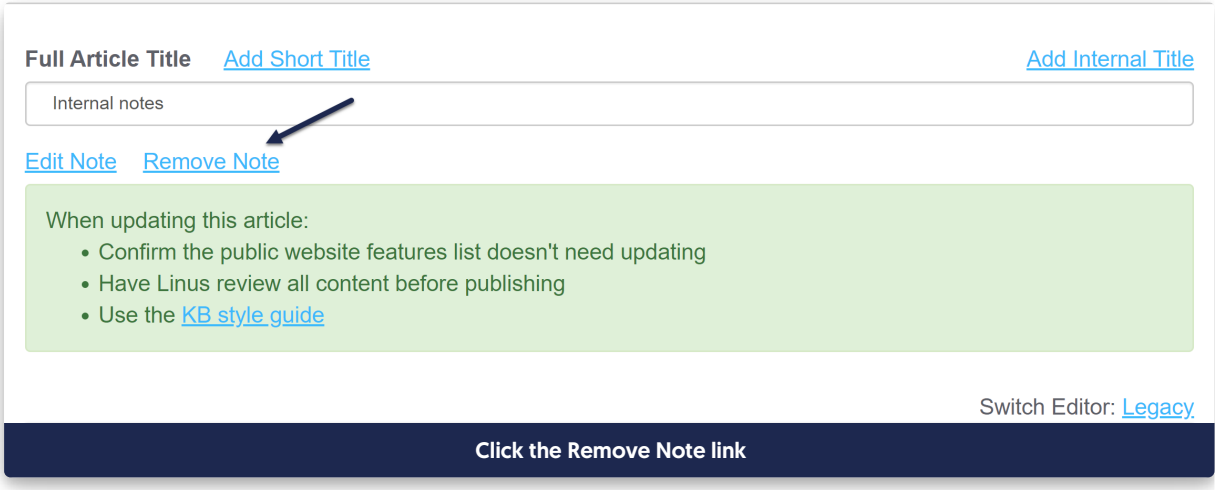
Remove an internal note

Authors with the default Editor or Writer role can remove internal notes. If you're using a custom role, you'll need to have the **Internal Notes** Permission to Remove internal notes.

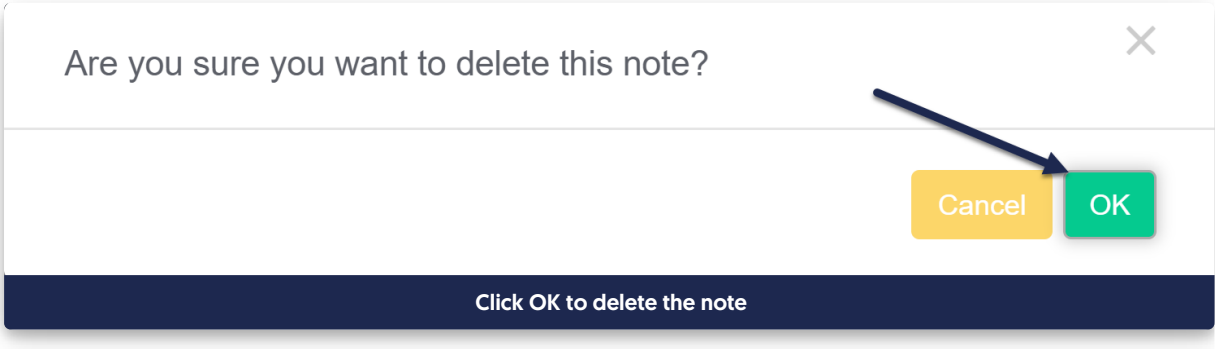
Authors who don't have permissions to create, edit, or delete internal notes will still be able to see internal notes created by other authors who do.

To delete an internal note completely:

1. Select the **Remove Note** link that appears just above the note:



2. A confirmation window will pop-up to be sure you want to delete the note. Select **OK** to delete the note.



3. The note is deleted immediately; you do not need to resave the article or category for the deletion to complete.

What HTML is supported in internal notes?

We've kept these notes pretty lean. They will support HTML:

- **Paragraph** `<p>`
- **Numbered list** `<ol>`
- **Bulleted list** `<ul>`
- **List items** `<li>`
- **Hyperlinks** `<a href="www.mylink.com">Link text</a>`
- **Bold text** `<b> or <strong>`

- **Italics** `<i>`
- **Paragraph breaks** `<br>`
- **Headers, e.g.** `<h1>`

Internal category title

Last Modified on 12/05/2024 12:53 pm EST

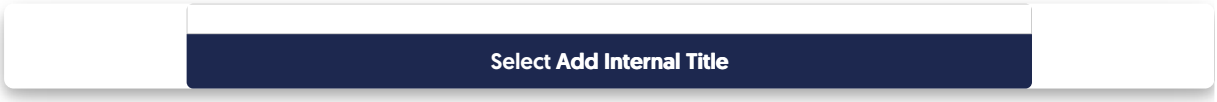
For each category, you can add an internal title. Internal titles are used only within app.knowledgeowl.com - your readers do not see them when viewing the knowledge base.

Internal titles can be useful when you have a lot of categories or subcategories with very similar names, and you want to be sure you're selecting the correct category when you use:

- The Insert Link to Article option in Modern Editor
- The Related Articles section
- The Change Article Category option in the article editor

To add an internal title to a category:

1. Open the category settings. Refer to Edit a category for more information.
2. Select **Add Internal Title**.



3. The **Internal Category Title** field displays. Enter the title you want to use internally here.



4. Be sure to **Save** your changes.

Where will I see internal category titles?

The internal title is displayed instead of the Full Article Title in these places within app.knowledgeowl.com:

- The Articles hierarchy
- In the editor, the Category display beneath the Author field, along with the pop-up search to change categories when that gear icon is clicked
- The Manage Articles CSV export > Basic > Category and Breadcrumbs columns
- The Insert Link to Article pop-up/search in the editor
- The Related Articles search in the editor (only Topic Display and Custom Content categories show up in this list)
- If you have synced categories between different knowledge bases, the internal title will display in the editor messages identifying the synced categories.

Use cases

My knowledge base might contain one category for each of my products, and I might use the same subcategory hierarchy for each product. So this might be my first two products:

- Opportunities for Owls
  - Setup instructions

    - Troubleshooting & tips
    - Customization
- Fight & Flight
    - Setup instructions
    - Troubleshooting & tips
    - Customization

When I want to reference the Fight & Flight Customization subcategory to assign an article to it, or Link to Article to that subcategory, right now if I search Customization, both of these will come up and I won't be able to tell which is for Opportunities for Owls and which is for Fight & Flight. I don't want to change the titles of the categories themselves, because I don't want my customers to see that difference.

I can add an Internal Title to both categories to distinguish them, and that's what will be used for all app.knowledgeowl.com layouts:

- Opportunities for Owls
    - Setup instructions - OfO
    - Troubleshooting & tips - OfO
    - Customization - OfO
- Fight & Flight
    - Setup instructions - F&F
    - Troubleshooting & tips - F&F
    - Customization - F&F

This way, when I link to a category or I edit the category, I can search for Customization - F&F and know I'm always getting the correct category.

Category icons

Last Modified on 07/10/2024 4:35 pm EDT

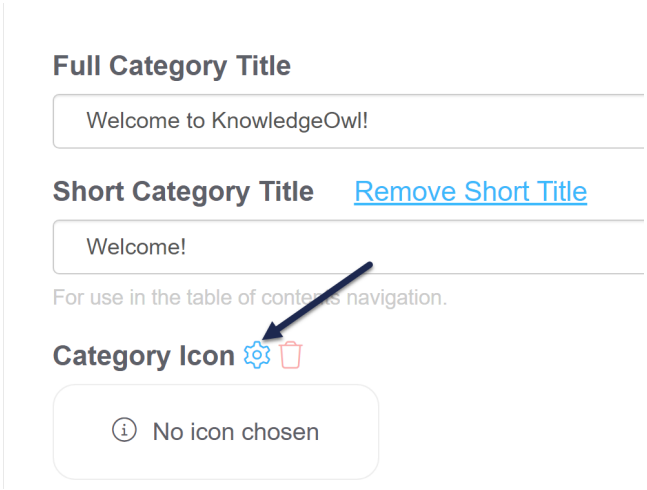
You can add icons to your categories, then use these icons on your homepage or when displaying lists of categories.

You can choose to add an icon in two ways:

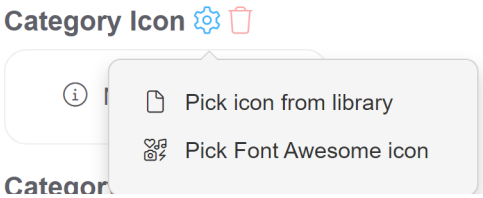
- Use our integration with Font Awesome to select a Font Awesome icon, set the color, and style for it. (Duotone is pretty cool!)
- Upload your own icon file (or use an existing icon in your File Library)

Add an icon to a category

1. Open the category for editing.
2. Click the gear cog next to the **Category Icon** heading.



3. Choose how you'd like to add an icon:

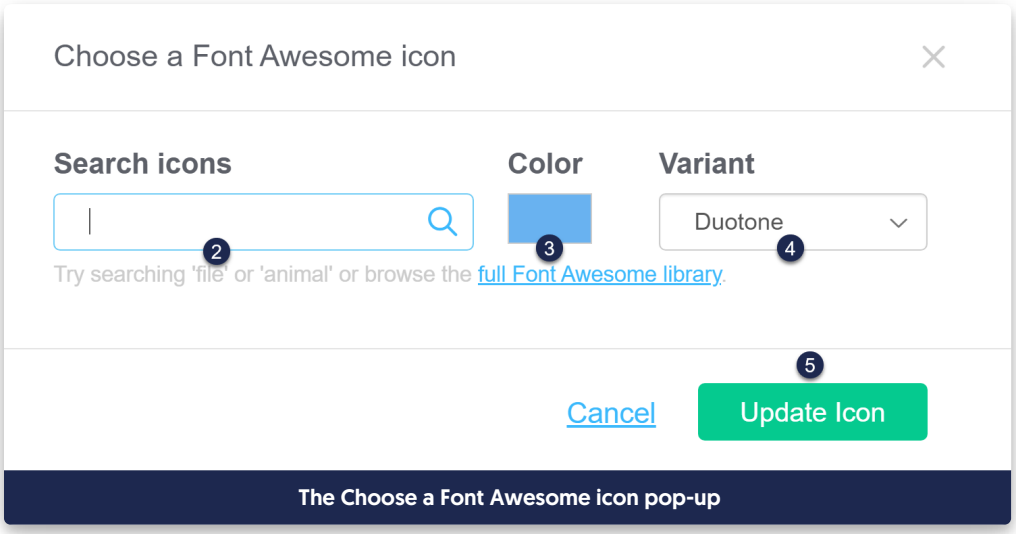


   - **Pick icon from library** will prompt you to select an existing file from your File Library or upload a new file of your choice.
     1. Once you select this option, an **Add from Library** pop-up opens.
     2. Search or browse for an existing file or use the **Upload New File** button in the lower left to add a new one.
     3. Once you've selected or uploaded the file you'd like to use, click **Insert File** to add the icon to

the category.

- **Pick Font Awesome icon** will prompt you to select one of over 6000 icons in Font Awesome's icon library. We pay for the license so you can use them as much as you'd like!

    1. Once you select this option, a **Choose A Font Awesome icon** pop-up opens:



The Choose a Font Awesome icon pop-up

    2. Enter a phrase or word into the **Search icons** box, then hit Enter or click the magnifying glass to search. This search will look through Font Awesome's catalog to return icons. If you're not sure what to search, you can also head over to the Font Awesome website to browse icons. Click to select the icon you'd like to use.

    3. The **Color** section will start with whatever color has been set in **Settings > Style > Colors > Category Icons**. To change the color of the icon, click in the **Color** swatch. You can use the color picker to select a new color or directly enter a hex code.

    4. The **Background** section will start with whatever color has been set in **Settings > Style > Colors > Category Icons Background**. To change the color of the background, click the **Background** swatch. You can use the color picker to select a new color or directly enter a hex code. The background will provide a small square background of color around the icon:



    5. Select a **Variant**. These are Font Awesome's predefined variant styles:

        - **Duotone** (default): A two-tone style, Duotone will use the color of your choice plus a lighter variation to provide a two-tone icon. Font Awesome suggests this style for an illustrated feel and attention-grabbing, which is why we default to this style for category icons. For example, here is the House icon in Duotone:



        - **Regular:** The icon is outlined using the color you selected. Font Awesome suggests this style for easy, readable icons that blend in with regular text. Here's the same House icon in Regular:



- **Solid:** This icon usually follows the Duotone version of the icon but fills it solid with the color of your choice. Font Awesome recommends these for small sizes and bringing contrast to text. Here's the same House icon in Solid:



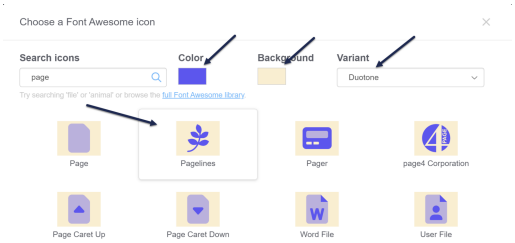
- **Light:** Light uses the same outlined icon version as Regular, but thins the lines moderately. Here's the same House in Light:



- **Thin:** Thin uses the same outlined icon version as Regular, but thins it significantly. Here's the same House in Thin:



6. Once you've configured the icon as you'd like, click the **Update Icon** button to add the icon to the category. For example, here we've selected the Pagelines icon in a purple Duotone with a cream background:



4. Once you've added your icon, a preview of your selection appears in the editor.
5. Be sure to **Save** the changes to your category once you're done.

Display category icons on your homepage only

We have a pre-defined merge code to help you display your icons on your homepage. This merge code will change some of the look and feel of your homepage, so if your knowledge base is in active use, we recommend requesting a Sandbox copy of it to test the merge code in.

See Add category icons to your homepage category panels for full steps on adding category icons to your homepage automatically!

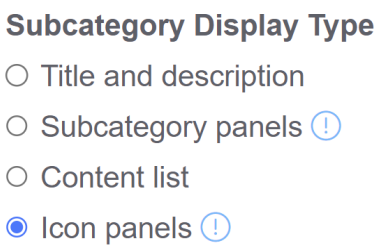
Display category icons in other categories

If you have a category which contains subcategories, you can use the Icon panels Subcategory Display Type to display those icons.

Control subcategory display

Last Modified on 07/10/2024 4:35 pm EDT

For Default category types, you can choose how to display subcategories (that is, categories within this category) on the category homepage using the **Subcategory Display Type** setting.



To set or change these settings:

1. Open the category for editing. Refer to Edit a category for more information.
2. Make your Subcategory Display Type selection.
3. Some Subcategory Display Types include additional settings, which will appear below the Subcategory Display Type. Make any necessary additional selections.
4. Be sure to **Save** your changes.

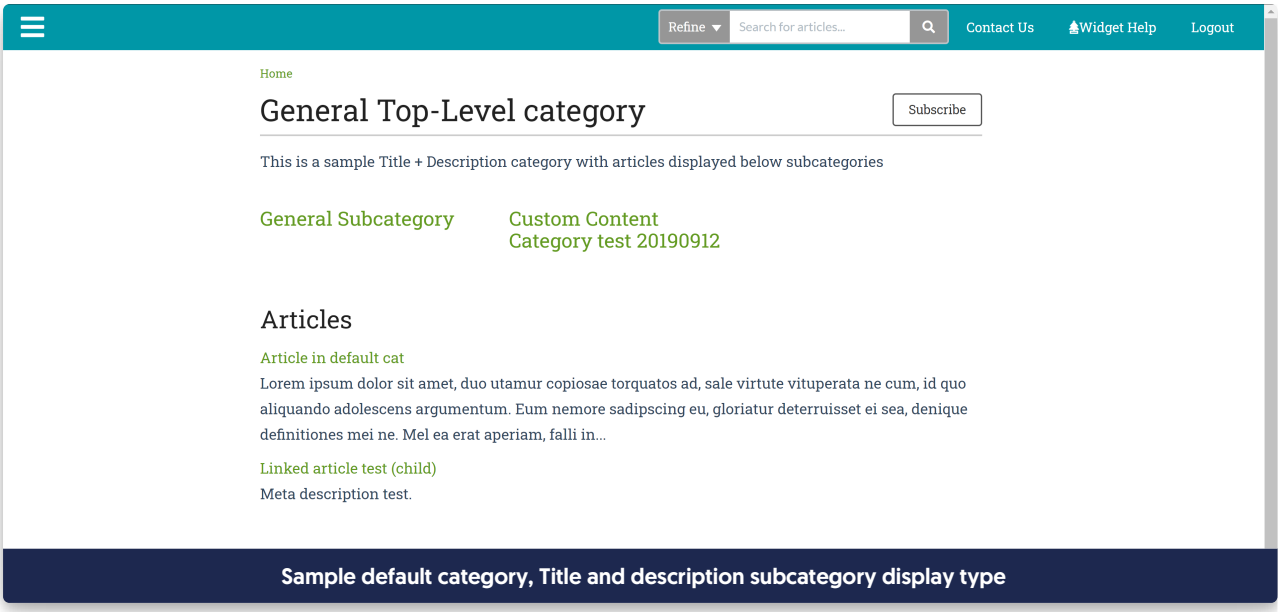
There are four Subcategory Display Type options:

- Title and description
- Subcategory panels
- Content list
- Icon panels

Title and description

This Subcategory Display Type displays category titles and description in a simple grid format with three categories to a row. Example: Company and product info.

We have a modified version with subcategories in our knowledge base (we force one subcategory per row): Example: Security and permissions



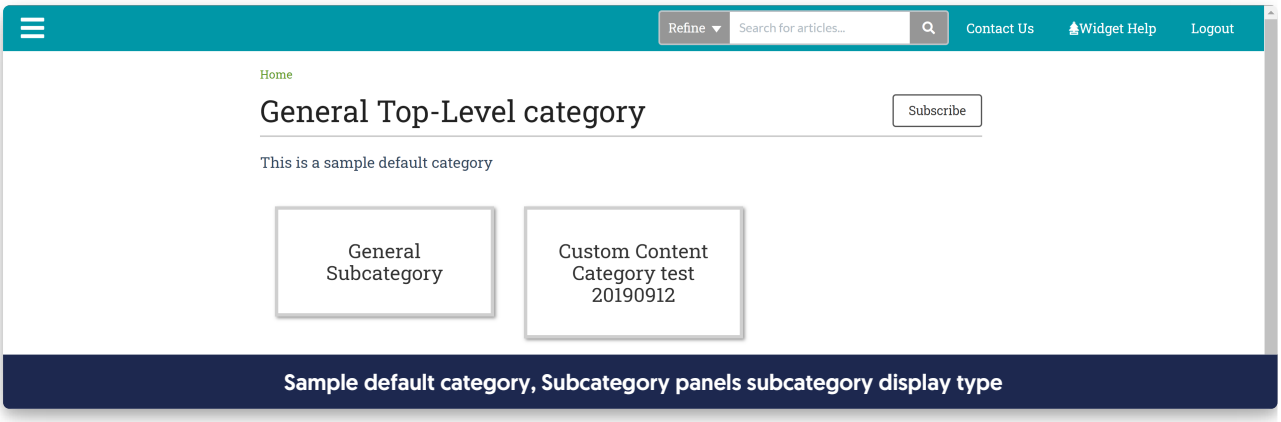
Sample default category, Title and description subcategory display type

Subcategory panels

This Subcategory Display Type displays subcategory titles in panels matching the homepage base category panels with three categories to a row. We have modified versions of this in our knowledge base (we force one category per row).

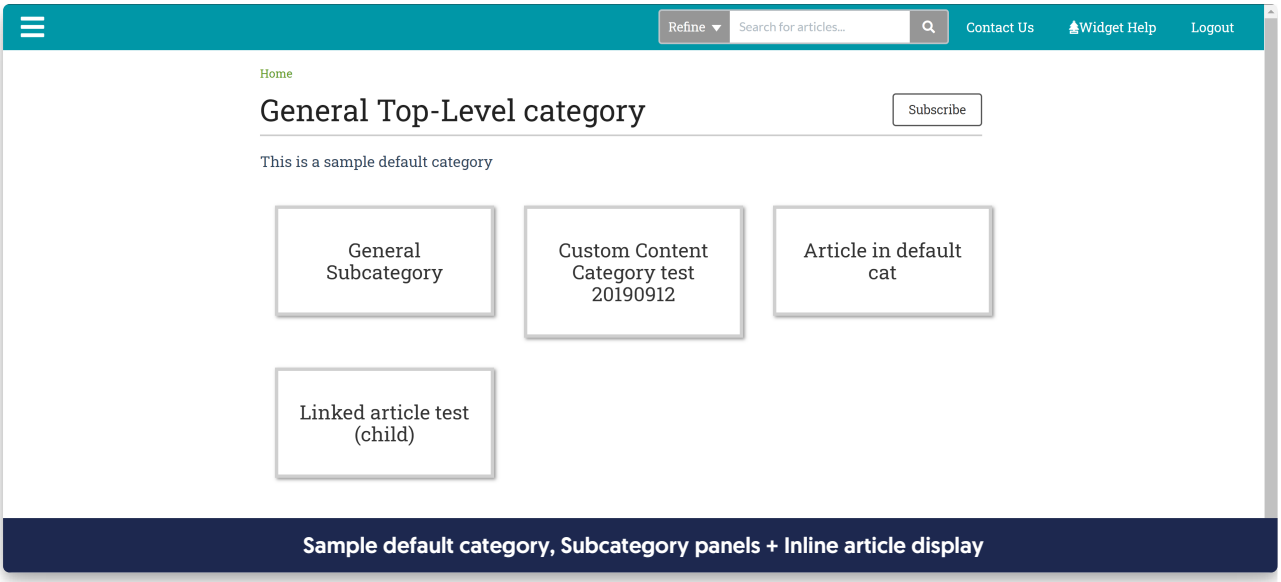
Article Display limitation
When using subcategory panels, articles only show when using inline display for the Article Display options.

So, for example, here is the same category as above with subcategory panels selected, without the inline display selected:



Sample default category, Subcategory panels subcategory display type

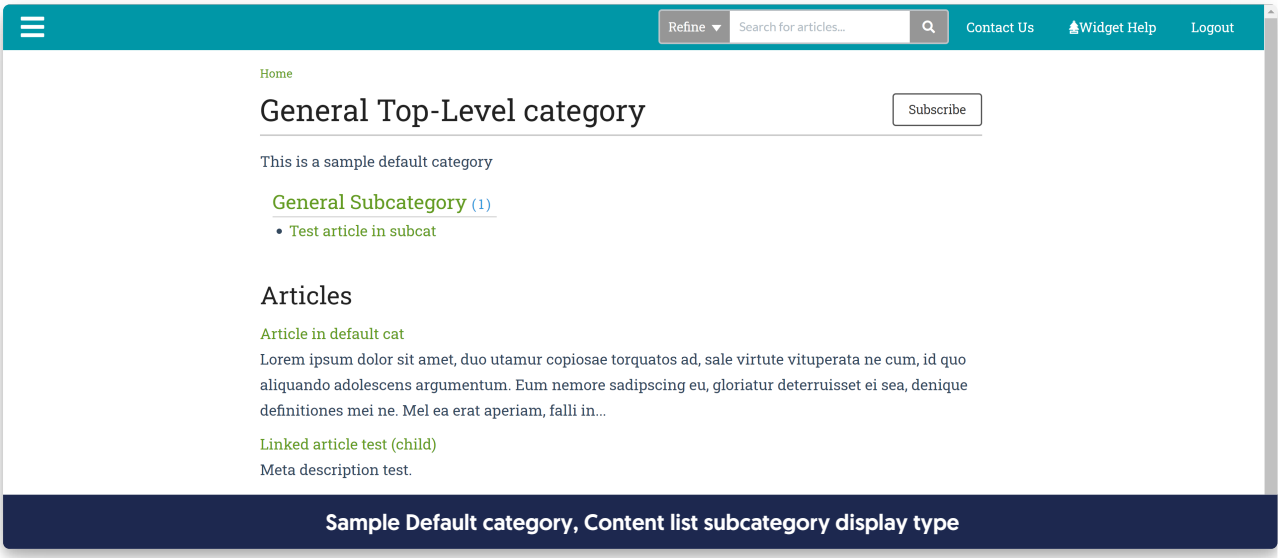
And with the inline display selected, where articles are displayed in the same panels:



Sample default category, Subcategory panels + Inline article display

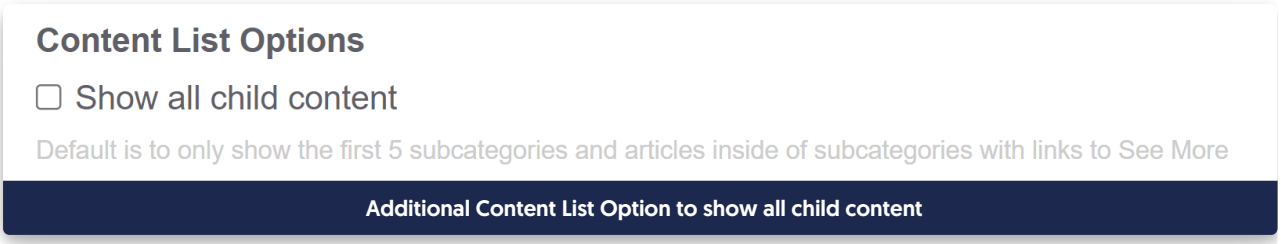
Content list

This Subcategory Display Type displays the title of each subcategory with a list of links to the first five subcategories or articles in the categories. The total number of subcategories and articles are displayed in parentheses with a link to view all. Example: Account and billing.



Sample Default category, Content list subcategory display type

There is an option to show all child content rather than just the first five:



Additional Content List Option to show all child content

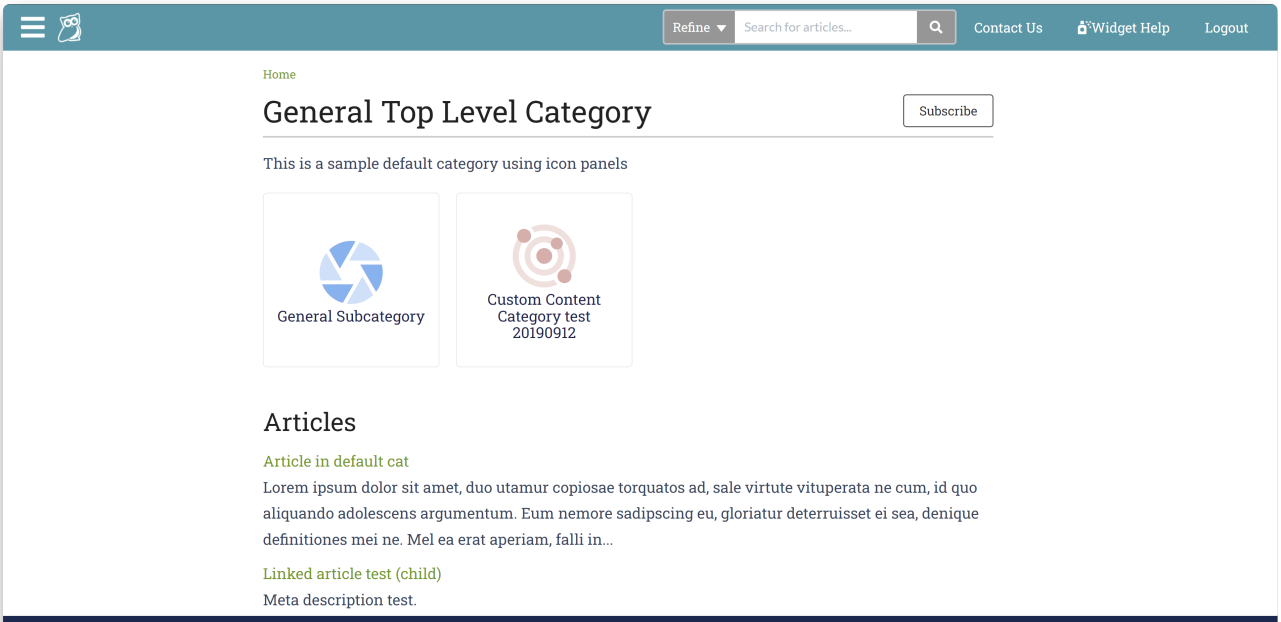
Icon panels

This Subcategory Display Type displays all subcategories in panels with icons, in the same style as Add category icons to your homepage category panels. These use the category icons you've set for each

subcategory, and we have a few default icons that will be used if a category doesn't have an icon, too.



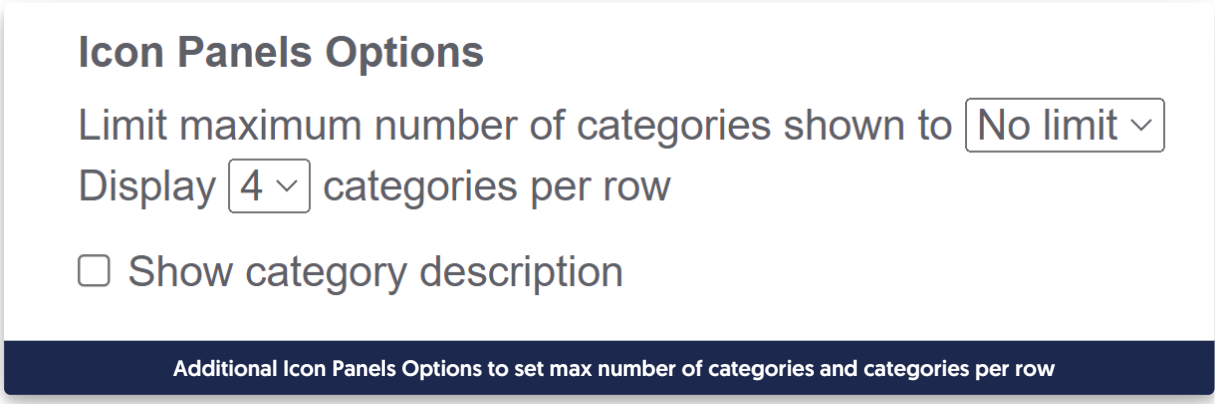
This option is not compatible with the Inline article display--you must select above or below subcategories display option.



Sample Default category, Icon panels subcategory display type

There are three additional Icon Panels Options:

- Limit the maximum number of subcategories displayed. This is useful if you have a lot of categories and only want to display the first few. (Default is no limit.)
- Set how many subcategories you'd like per row. When higher numbers are selected, the display is automatically responsive to device size, so 4 categories per row on a laptop may shift to 1 category per row on a cell phone. (Default is 4 categories per row):
- Show category description. If you'd like to display the category's description within the panel, check this box. (Default is no description.) We recommend using short category descriptions if you use this option.



Additional Icon Panels Options to set max number of categories and categories per row

After you set up your category, KnowledgeOwl automatically displays the category's content in the chosen format.

Quick Add/default setting

All newly created Default categories (including Quick Add categories) will have these default settings:

- Icon panels subcategory display type
- No limit on the number of subcategories
- 4 categories per row
- No category description displayed
- Below subcategories article display
- Toggle option in the table of contents

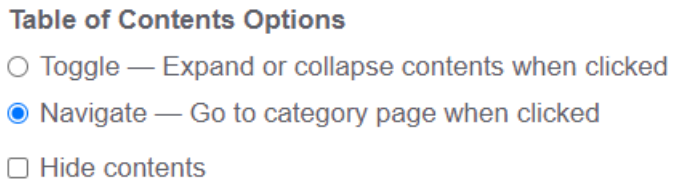
Customize category behavior in the table of contents

Last Modified on 05/29/2024 5:27 pm EDT

When a reader clicks on a category in the table of contents, the default behavior is for the category menu to toggle open and closed to show and hide its content.

If you want clicking the category to navigate to the category landing page:

1. Open the category settings. Refer to Edit a category for more information.
2. Select **Navigate** under the **Table of Contents Options** on the category's settings page:



3. **Optional:** by default, when using the **Navigate** setting, KnowledgeOwl both navigates to the category page on click, and toggles open the category menu. To hide the sub-menu and remove the toggle behavior, select **Hide contents**.

Delete a category and its content

Last Modified on 10/07/2024 9:13 pm EDT

You can delete a category in two places:

- From the **Articles** page, using the trashcan icon.
- From the Category Editor when you're viewing that category, by selecting **Deleted** from the **Status** dropdown.

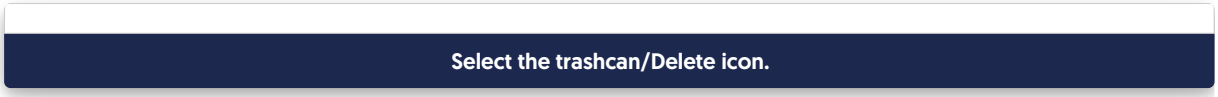
Below, we walk through each method in more detail.

Category deletes also delete content
When you delete a category, you also delete all the content inside the category. If you want to delete a category but not the content inside it, move the content out of the category before deleting. If you delete a category by accident or need to recover a deleted category, contact us so we can recover the category and all of its articles and subcategories.

Delete category from the Articles page

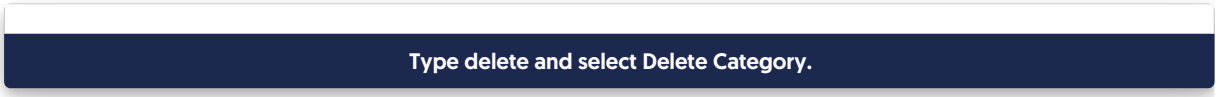
To delete a category from the Articles page:

1. Select **Articles** from the left navigation.
2. Find the category you want to delete. If it's a subcategory, you'll need to open the category it's located within.
3. Hover over the category you want to delete.
4. Select the Trashcan / **Delete** icon.



Select the trashcan/Delete icon.

5. The **Delete Category** modal opens. Be sure the category name displayed here matches the category you want to delete!
6. If it does, type the word **delete** into the textbox and select **Delete Category**.



Type delete and select Delete Category.

7. The category and all of its subcategories and articles will be set to Deleted.

Delete category from the Category Editor

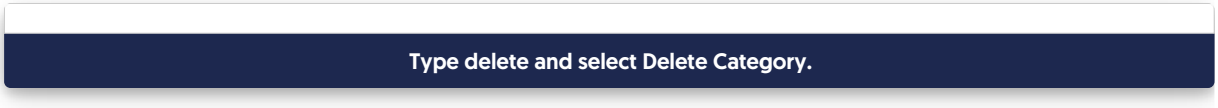
To delete a category from the Category Editor:

1. Open the category you'd like to delete as if you're going to edit it.
2. In the **Status** dropdown, select **Deleted**.



Select Deleted from the Status dropdown.

3. This will open a confirmation pop-up which will warn you that once you save the category with this status, all content within the category will also be deleted. If you want to proceed with deleting, type the word **delete** into the textbox and select **Confirm**.



Type delete and select Delete Category.

4. **Save** your category to finalize the status change and deletion.
5. Your category and all of its subcategories and articles will be set to Deleted.

Hide a category from navigation

Last Modified on 07/17/2024 10:37 am EDT

You can hide a category from the table of contents, landing pages, article lists (certain categories only), and breadcrumbs. This can be useful for Sharing "draft" articles before making them publicly available, or having resources you only want to direct people to by URL.

To alter a category's display settings:

1. Open the category to edit it.
2. Select the display limitations you want from the **Display Settings** menu. Different category types have different restrictions options, and the options also vary depending on whether the category is a subcategory or top level category.
3. Select **Save**.

Display Settings options

This list describes all the possible display settings options and their behavior. The table below shows which settings are available to each category type.

- **Exclude from search results**: Users cannot find the category through the knowledge base search.
    - This setting will also remove the article from the Recommended tab of Contextual Help Widget (2.0) and from the Recommended section of Contextual Help Widget (Modern).
- **Hide from table of contents**: Category does not appear in the table of contents or the Contextual Help Widget (2.0) Knowledge tab
- **Hide from homepage**: Category is not listed on the homepage.
- **Hide from category landing page**: Category is not listed on the parent category's landing page.
- **Hide from article lists**: Category does not appear on the homepage or the Popular, New, and Updated article lists. This does not affect the Recent Articles List or Article Favorites.
    - This setting will also remove the article from the Recommended section of Contextual Help Widget (Modern).
- **Remove "Download to PDF" icon**: Prevent readers from downloading this category as a PDF.
- **Remove feedback ability**: Disable the ratings section in this category, even if they are enabled for the knowledge base overall.
- **Remove comment ability**: Disable the comments section in this category, even if they are enabled for the knowledge base overall.

Content restrictions by category type

Category type	Subcategory?	Available options
Default Blog style Shared content URL redirect	No	• Hide from table of contents • Hide from homepage

Category type	Subcategory?	Available options
Default Blog style Shared content URL redirect	Yes	• Hide from table of contents • Hide from category landing page
Topic display	No	• Exclude from search results • Hide from table of contents • Hide from homepage • Hide from article lists
Topic display	Yes	• Exclude from search results • Hide from table of contents • Hide from category landing page • Hide from article lists
Custom content	No	• Exclude from search results • Hide from table of contents • Hide from homepage • Hide from article lists • Remove "Download to PDF" button • Remove feedback ability • Remove comment ability
Custom content	Yes	• Exclude from search results • Hide from table of contents • Hide from category landing page • Hide from article lists • Remove "Download to PDF" button • Remove feedback ability • Remove comment ability

Articles within these categories

Articles do not inherit category display settings. You may need to take more steps to fully hide a category and all its contents or to hide individual articles.

- Articles inside a hidden category (one that is hidden from the table of contents, category landing pages and so on), are still available in search. Refer to Exclude a category and all its content from search results for guidance on completely removing a category from search.
- If you want to hide articles inside a category, you can:
    - Mark individual articles as **Hide from table of contents**, **Hide from category landing page**, and **Hide from article lists** (and/or **Exclude from search results**). If you're trying to hide all articles in a category, you'd need to change this setting for all articles individually.
    - Create a reader group and restrict the category to this reader group (we often use a group called "Hidden" for these purposes!). This effectively hides the category and all its content from anyone who is not a member of that reader group. See How do reader groups work? for more information on working with reader groups.

Restrict a category to certain readers

Last Modified on 05/29/2024 5:28 pm EDT

Sometimes, you need to restrict content to certain groups of readers. For example, you may want some content in your knowledge base to only be available to people at your company, while wanting other sections to be public.

To restrict a category or subcategory to certain readers, refer to the instructions in the reader group documentation:

1. First, create a reader group.
2. Then restrict the category to the reader group. When a category or subcategory is restricted to a reader group, only readers who are part of the group can access the category.

Reader group restrictions are inherited by subcategories and articles, meaning that if you apply a reader group to a category, the same permissions also apply to any content inside the category. This means that if you want to restrict everything inside a category, you only need to set the reader group restrictions on the category, and KnowledgeOwl automatically applies the same restrictions to the content inside the category.

Exclude a category and all its content from search results

Last Modified on 05/29/2024 5:28 pm EDT

Have you ever wished you could exclude an entire category's contents from search, all at once? Maybe you have a category where you include content specific to particular customers, where you provide them a URL and otherwise hide that category from search and navigation. Or, you might have a category you use for Internal Reviews, where you publish things that are in-progress to get feedback from subject matter experts, but you don't ever want your general readership to find those resources.

Search result exclusions are usually set in individual articles. They don't get passed from the category to the articles.

So, for example, if I have a category called Enterprise Resources, and it contains subcategories for each of my enterprise customers, I'd have to manually set each individual article to be excluded from search:

- Enterprise Resources
  - Customer 1
    - Article 1 (exclude from search)
    - Article 2 (exclude from search)
  - Customer 2
    - Article 3 (exclude from search)
    - Article 4 (exclude from search)

Excluding content from search this way can be inconsistent, since it depends on your content creators to remember to check the box in each article or for you to create a reader group restriction.

In the Search Settings, you can fully exclude a single category *and all of its content* from search results. When you use this option, it automatically excludes from search:

- All articles directly within the category
- The main category (if it's topic display or custom content, which are indexed for search)
- All topic display or custom content subcategories
- All articles in the category's subcategories

So, in the above example, if I set my Customer 1 category to be hidden from search, Article 1 and Article 2 would be automatically hidden, even if I didn't check that option in the articles themselves.

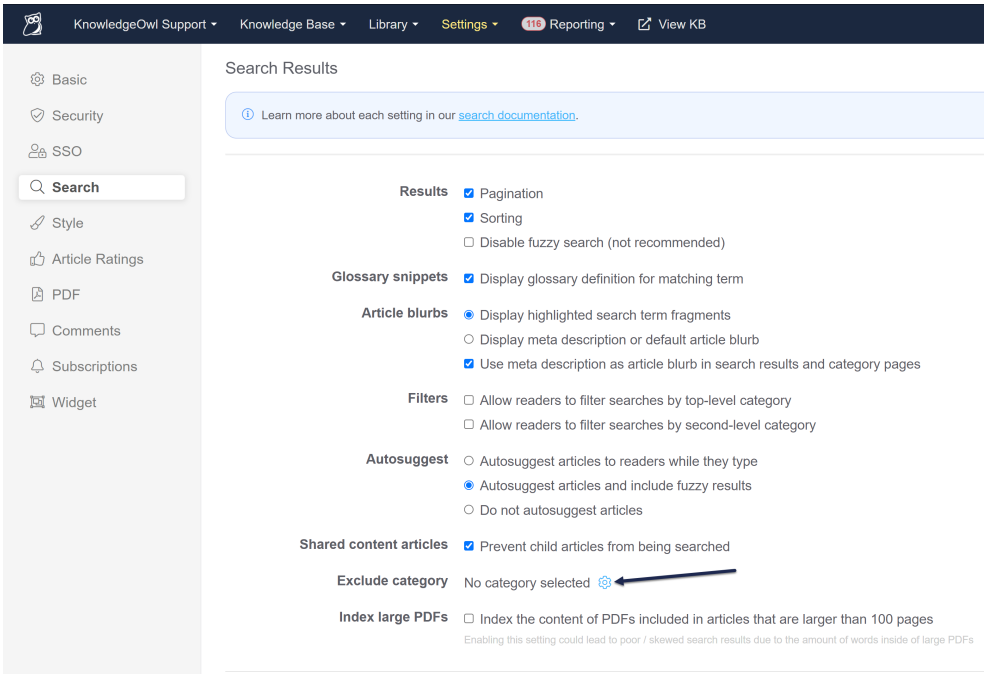
If I set Enterprise Resources category to be hidden from search, all four articles would be hidden from search, as would any future articles created for additional customers.

Exclude a full category from search

To exclude a category and all its content from search:

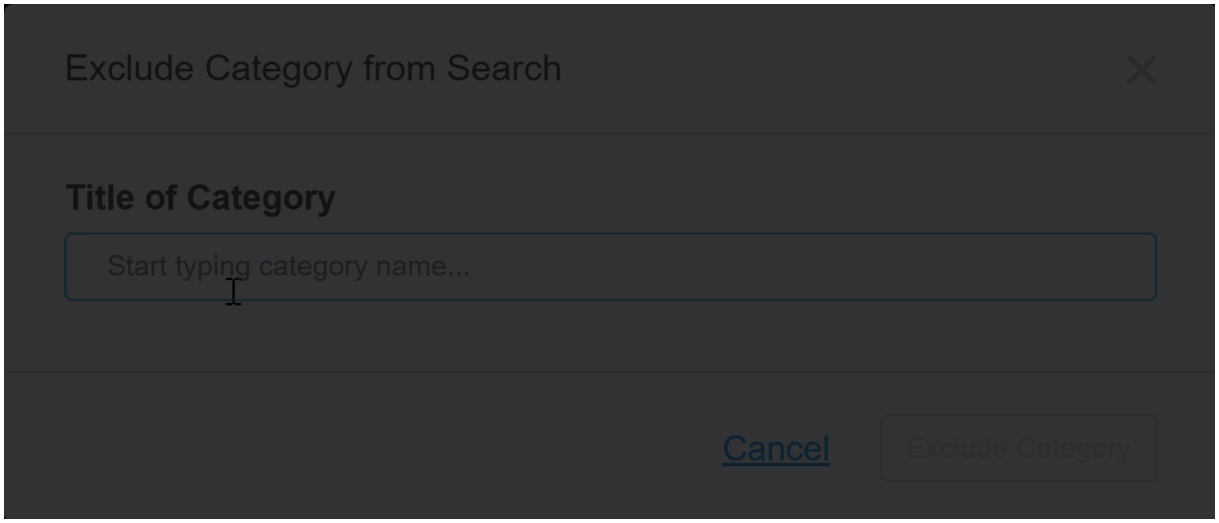
1. Go to **Settings > Search.**

2. **Next to Excluded category, select the gear icon:**



3. **In the pop-up that appears, start typing the name of the category you want to exclude. You'll get an autosuggested list as you type. Click the category you want to select.**

4. **Then select Exclude Category.**



5. **Once you've made your selection, click Save to save your changes.**

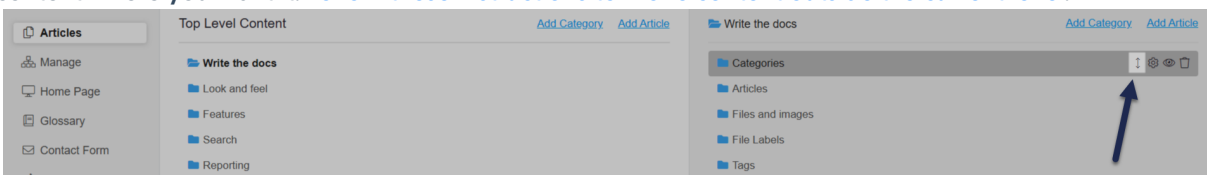
All of the content in that category is now excluded from search.

Reorder categories or articles

Last Modified on 05/29/2024 5:28 pm EDT

Reorder categories or articles by rearranging their order in **Knowledge Base > Articles.**

1. Hover over the article or category you want to move.
2. Click on the up and down arrow icon to the right of each category or article, and drag and drop the content where you want it. Follow these instructions to move content outside the current level.



Move categories or articles between levels

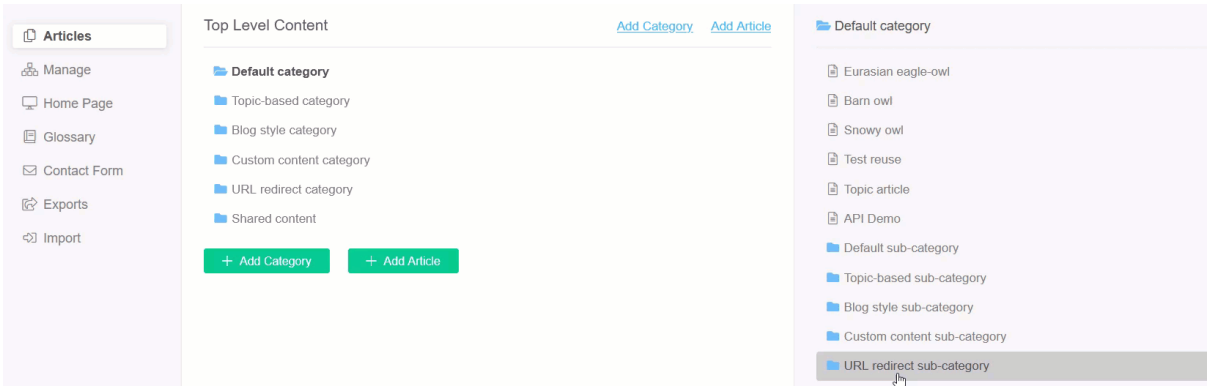
Last Modified on 05/29/2024 5:28 pm EDT

In **Knowledge Base** > **Articles**, in addition to reordering content inside the current level, you can also:

- Move articles and categories to the top category level
- Move articles and categories into other categories (note that some category types cannot contain subcategories)
- Move articles and categories into other subcategories

To do this:

1. Click and hold on the title of the article or category you want to move.
2. Drag and drop it into the desired category, or drop it in the outline box for "Move to Top Level".



If you don't want to mess with drag and drop, you can also change the category an article or subcategory is located in the editor. To do so:

1. Open the article or category you want to move for editing.
2. In the righthand column of the editor, find the **Category** section. If the section is collapsed, expand it.
3. To make the content a **top-level** category or article, select the trashcan icon (article editor) or the red X icon (category editor) to remove the category entirely. Be sure to **Save** after making this change!



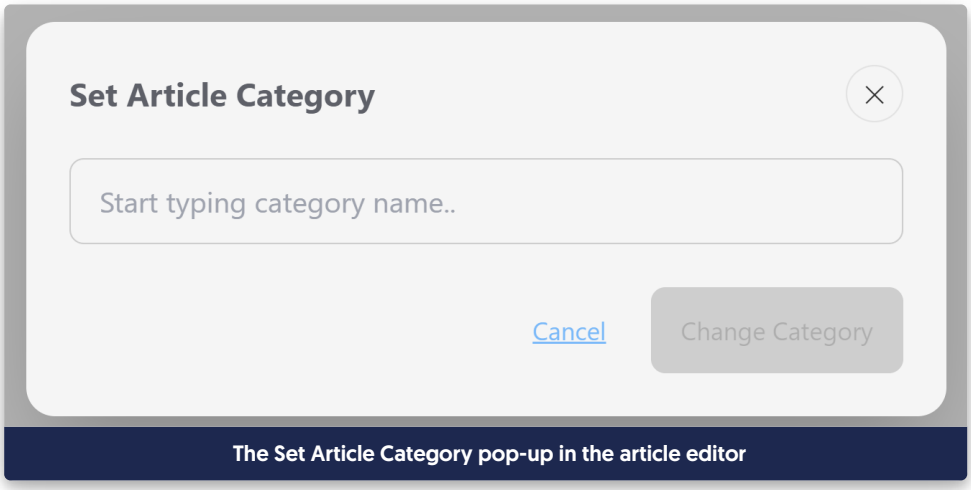
Use the trashcan icon in the article editor to remove the category completely

4. To replace the current category with a different category, select the **Change category** button (article editor) or click the gear cog icon next to the category title (category editor).



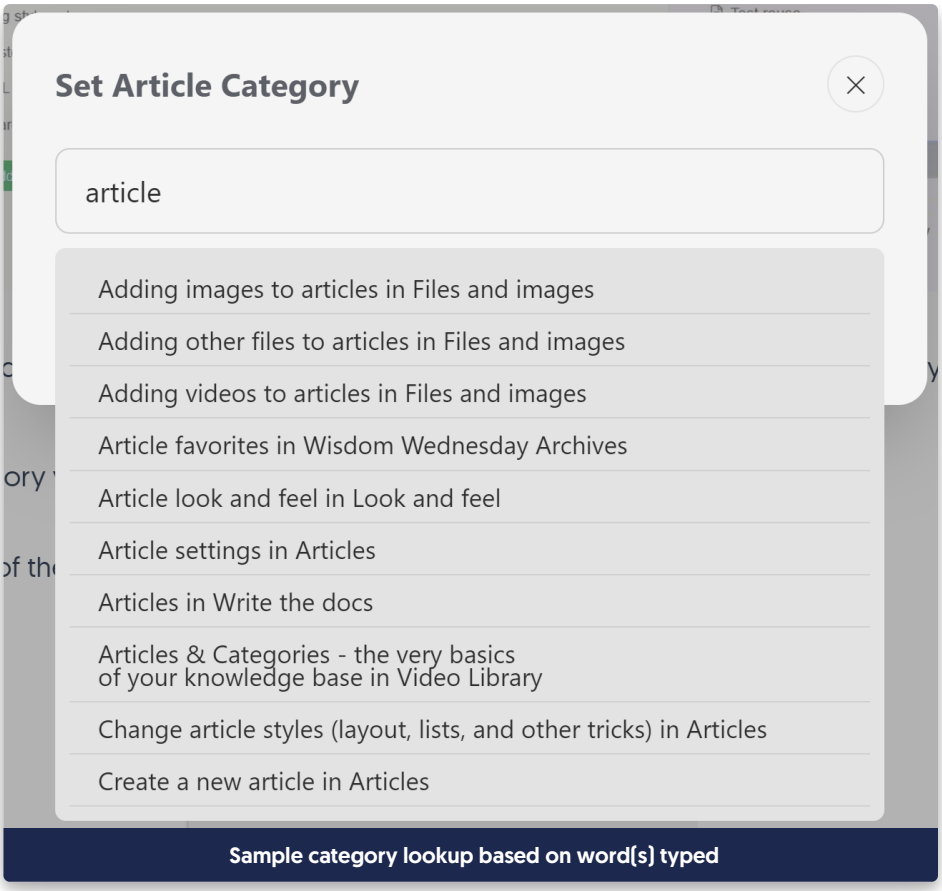
The Change category button in the article editor.

   a. This will open a **Set Article Category** pop-up where you can search for the new category by typing the name.

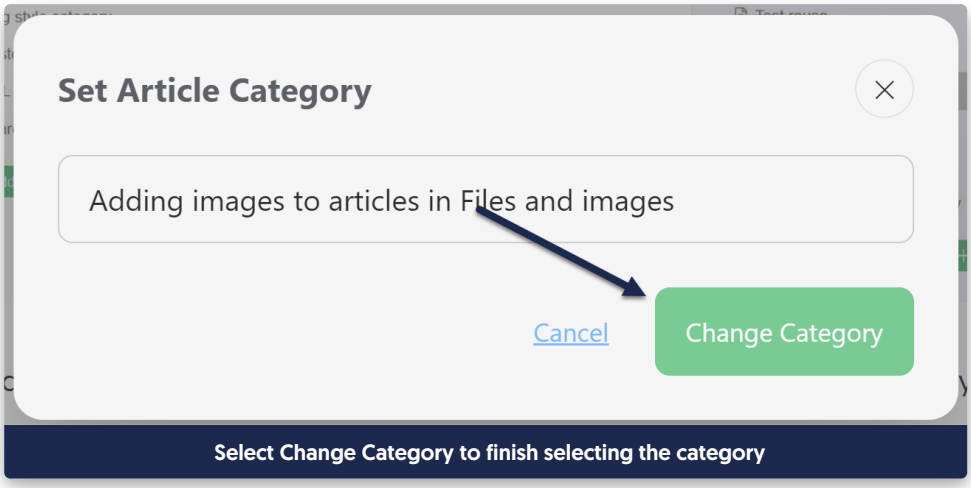


The Set Article Category pop-up in the article editor

   b. Once you type a few letters, a list of matching categories appears. Select the category you want to switch to.



c. **Once you've made your selection, click the Change Category button.**



5. **Be sure to Save your changes.**

Why is a category not coming up in search?

Last Modified on 08/20/2024 11:51 am EDT

If you are using default, blog, or URL redirect categories, they will not show up in search results.

Custom content categories and topic display categories are the only categories that show up in search results, since they contain their own content.

If you have a custom content category or topic display category that isn't coming up in search, it may be because:

- It's been set up to be excluded from search results. See Hide a category from navigation for more details.
- It's been excluded from search in **Settings > Search** or its within a category that's been explicitly excluded from search.

Why is a category not displaying to readers?

Last Modified on 05/29/2024 5:28 pm EDT

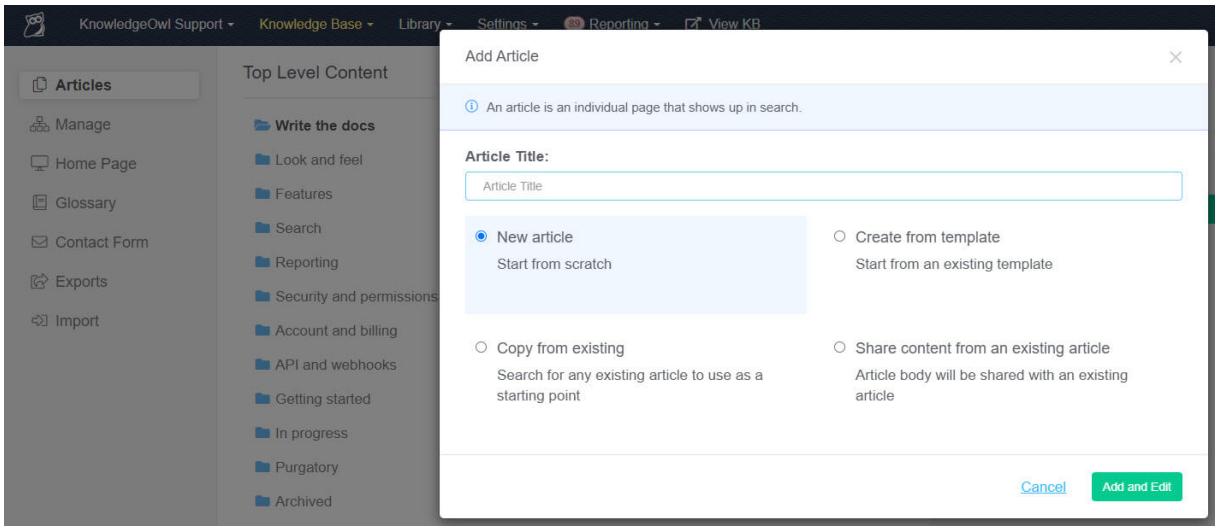
By default, KnowledgeOwl will not display empty categories to readers. If you have a category with no published articles available to the reader, the category will be hidden from the table of contents. Authors can see empty categories by default.

Article creation guide

Last Modified on 08/29/2024 12:54 pm EDT

To create a new article:

1. Navigate to the category where you want to create the article.
2. Select **+ Add Article**.
3. Enter a title for your article in the **Article Title** field.
4. Select how you want to create the article. Some of these trigger further steps. The options are:
    - New article from scratch
    - Create from template: when you select this, KnowledgeOwl displays the **Choose a Template Article** dropdown. This lists all articles that are set as templates. Select the template you want to use. This creates a one-off copy of the template. There is no ongoing link between the template and the new article, so updates to the template do not affect the article.
    - Copy from existing: when you select this, KnowledgeOwl displays options to browse for an article by title, in any of your knowledge bases. Select a knowledge base, then start typing the title of the article you want to copy.
    - Share content from an existing article: the steps for this are similar to copying from an existing article. However, we recommend following the detailed instructions in the Share articles between categories and knowledge bases section, to ensure you know exactly how the content syncing works.
5. Select **Add and Edit** to create the article and open the editor.



Create a new article from scratch

Last Modified on 05/29/2024 5:27 pm EDT

Selecting this option during article creation gives you a blank article. Refer to the Article creation guide for step-by-step instructions.

Article templates

Last Modified on 05/29/2024 5:27 pm EDT

Create an article from a template

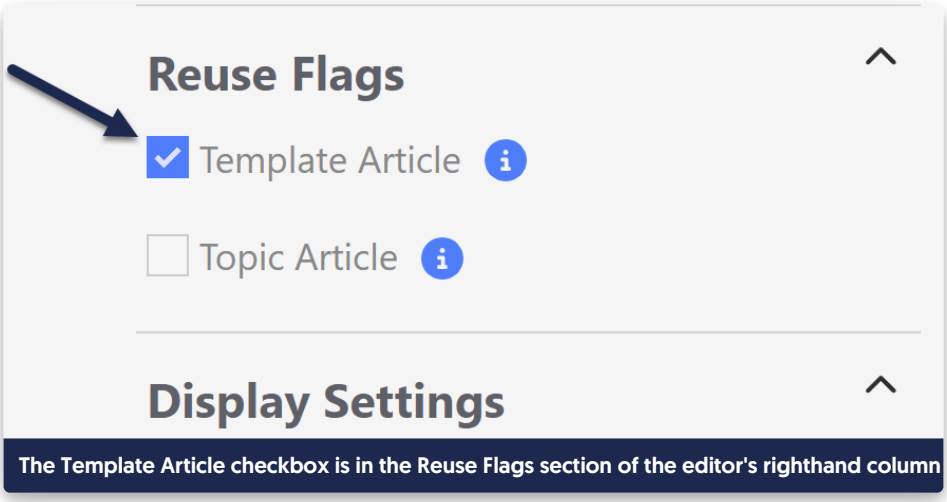
You can choose to create a new article using another article as a template or starting point. It's another way to copy an existing article as a starting point so you don't have to start from scratch. This creates a one-off copy of the template.

There is no ongoing link between the template and the new article, so updates to the template do not affect the article. Refer to the Article creation guide for step-by-step instructions.

Create a template from an article

You can turn any article into a template.

1. Open the article for editing.
2. In the **Reuse Flags** section of the righthand column, select **Template Article**.



The Template Article checkbox is in the Reuse Flags section of the editor's righthand column

3. Be sure to **Save** your changes.

The article will now be available in the **Choose a Template Article** dropdown when you create a new article. See the Article creation guide for more details.

Structure template (sample)

Last Modified on 05/29/2024 5:28 pm EDT

This is a sample template for providing style and structure guidance. Refer to Create from template for information on creating articles using templates. You could create a template article with a setup similar to this sample, in order to provide guidance to your writers.

When thinking about what to include in your template, consider using a style guide.

Heading 2: Major topic

Body paragraph. Anything not in a list should be formatted like this. References to specific menu/navigation options should be capitalized, e.g.: Click on Settings > Style. In general, avoid using italics. Use bold only when it feels necessary.

Heading 3: Subheading for Heading 2

Heading 4: You should really consider restructuring your content and breaking it up

Numbered Lists:

1. Always use numbered lists for step-by-step instructions.
2. Step 1. Each step should be a single, clear step in the process.
3. Screenshots should be included in the list item so that they are properly indented. Include arrows or callouts using branded color palette. Use rounded square for shape call-outs.

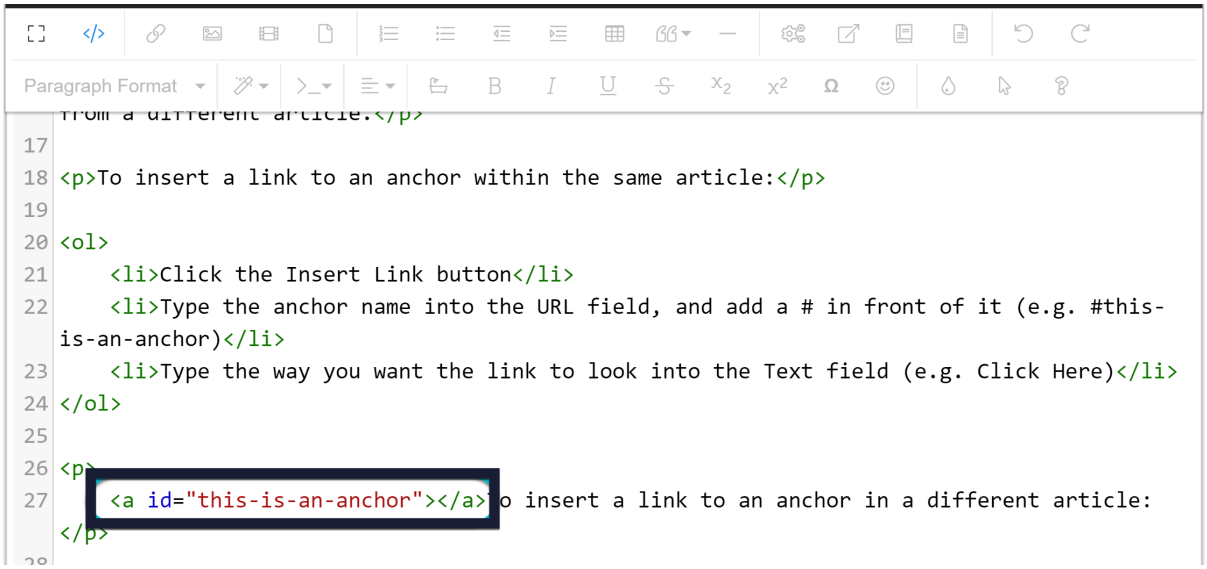


4. Sample code should be included in the list item so that it is properly indented:

```
<a href="#">Here's some sample code in just preformatted style</a>
```

Bullet point lists:

- Always use bullet point lists for lists rather than instructions
- Think carefully about list length. Longer lists are harder to process; it's recommended to keep bulleted lists to about seven items. Read more about making your content brain friendly.
- **Good use of bold:** when you have a bullet point list with items that also have descriptions
- Keep your list consistent; list items should either all end in periods or should have no periods
- Screenshots relevant to the list should be within the bulleted list item:



Pro Tip: Use **Alert Success** for things that could be classified as tips or "Pro Tips". These look better if they start with a bolded phrase.

Note: Use **Alert Info** for useful notes and asides. These aren't tips; they're a note or point that you want to call attention to.

Warning: Use **Alert Danger** for things that are destructive, permanent, or otherwise dangerous. If making a change or not following this step is going to cause disaster and chaos, tell people!

Copy an existing article

Last Modified on 05/29/2024 5:27 pm EDT

You can copy an existing article from any of your knowledge bases, to use as a starting point for your article. Unlike the shared content article, copying an article does not create a link between the two articles. Any changes you make in the new article will not affect the old article.

Refer to the Article creation guide for step-by-step instructions.

Share articles between categories and knowledge bases

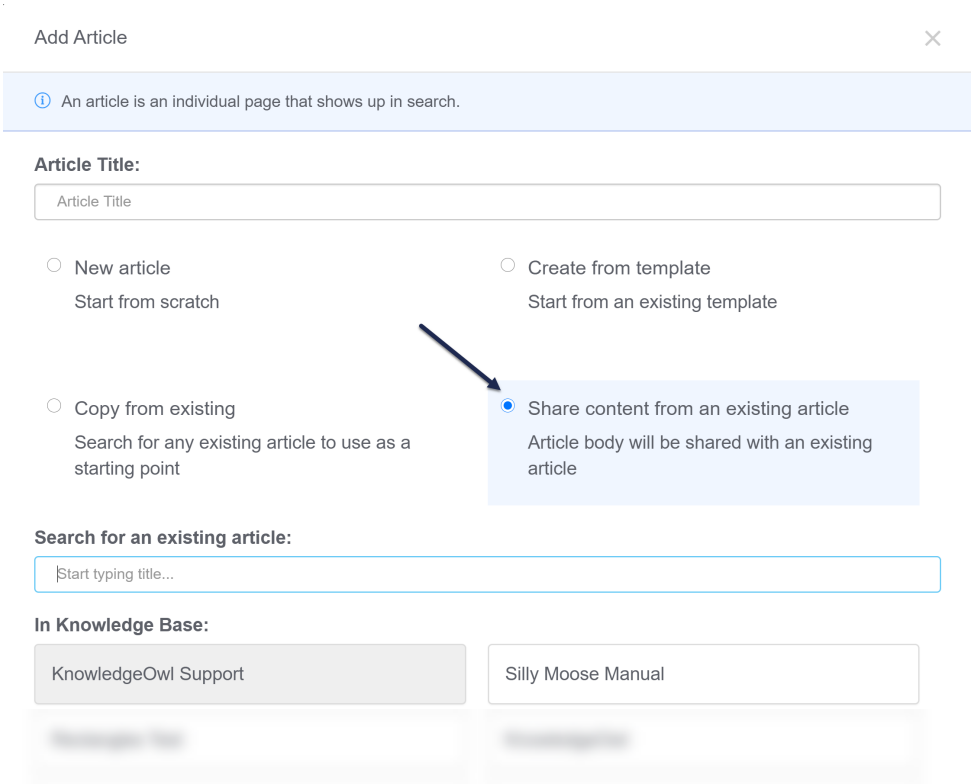
Last Modified on 05/29/2024 5:28 pm EDT

You can use a single article in multiple categories and across knowledge bases. The content (body) of the article as well as all versions stay in sync across all shared articles. Each article can have its own title, restrictions, and callouts. These are called shared content articles.

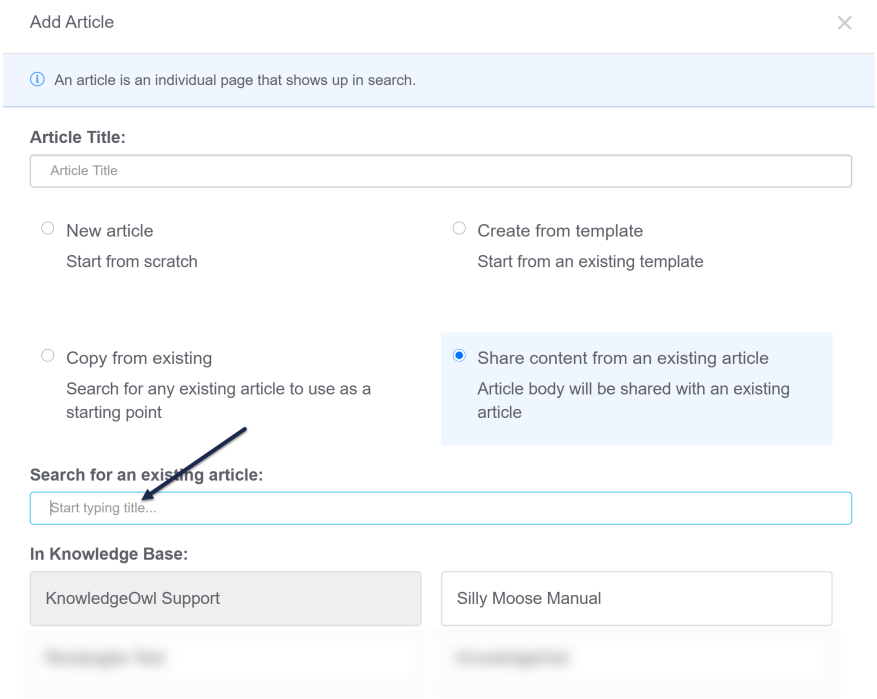
Updating the content of any of the articles updates the content of all of them.

To share an existing article in another category or knowledge base:

1. On the **Articles** page, navigate to the location where you wish to add the article.
2. Select **+ Add Article.**
3. Select **Share content from an existing article.**



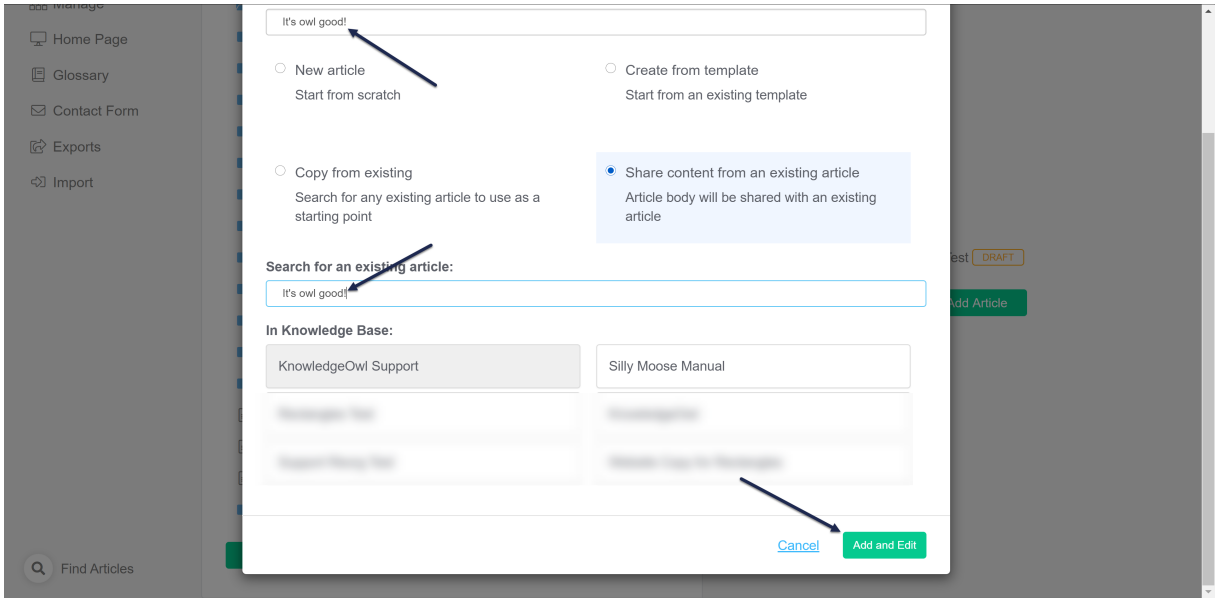
4. Additional options appear below. If you have multiple knowledge bases, the knowledge base you're currently in is selected, but you can select a different knowledge base's articles to search.
5. Next, in the **Search for existing article** field, start typing part of the article's name. This is an exact match search, and the dropdown will offer you articles that match your search.



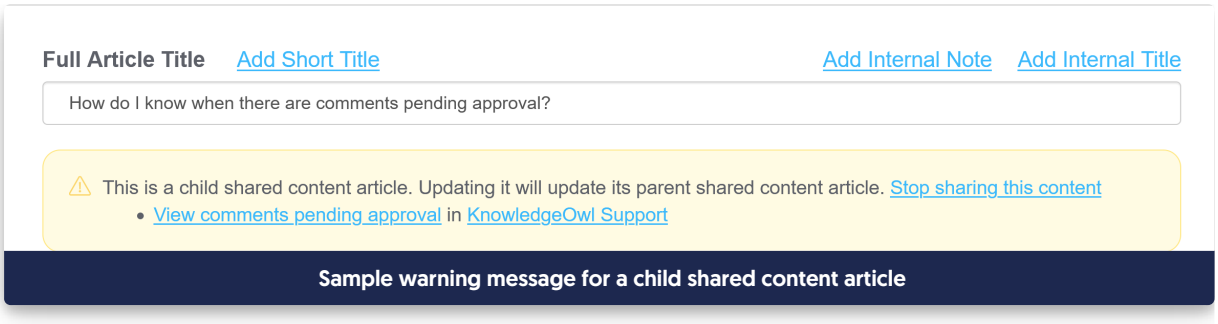
6. **Once the article you wish to share content with appears, select it.**

7. **This will copy the Article Title field at the top, based on the shared content article's title. You can change this if you wish.**

8. **Once you're done selecting the article and editing the title (if needed), click the Add and Edit button in the lower right to complete the content sharing.**



9. **This will open the new, shared content article. It will have all the content of the article you selected when you created it. It will open in Draft mode and will have a banner reminding you that this content is linked to an article in another location. Use the links in this banner to quickly navigate to the synced content article or the knowledge base where this is located.**



Sample warning message for a child shared content article

10. **You are now free to make any other changes as necessary to the article. Remember that any changes to the article body will be updated in all shared content articles.**

For information on what gets shared and how, see Shared content articles.

Generate article from title

Last Modified on 11/12/2024 3:18 pm EST

Stuck with writer's block? Use OpenAI to generate your article from your title! This can be a quick and easy way to generate some test or demo content to play around with new settings, formats, and so on.

Prerequisite
An account administrator must enable Linus Assist before you can use this feature. Right now, Linus Assist is only available to new accounts, but if you'd like to try it in your account, contact us !

How it works

Only the text of your article title is sent to OpenAI. No other information or content from your knowledge base is sent. Generate up to 20 articles across all your knowledge bases this way for free. Refer to What is Linus Assist? for more information.

To use this method for article creation:

1. On the **Articles** page, navigate to the location where you wish to add the article.
2. Select + **Add Article.**
3. Select **Generate article from title.**
4. Select **Add and Edit.**
5. The modal updates to show you the content as OpenAI generates it so you can preview what it looks like. If you're happy with the results, select **Add this content to my article.**



6. The editor opens with the generated content.

URL redirect article

Last Modified on 05/29/2024 5:28 pm EDT

What if the content you'd like to include in your knowledge base isn't IN your knowledge base? Maybe you'd like to reference the page of another site, or a press packet your PR department has put together.

You can set up both categories and articles as URL redirects. For articles, this means you can administer the article as an article (restrict it to groups, restrict editing to teams, use the article call-outs, assign related articles) but when someone clicks on the title of the article or navigates to the URL, they'll be redirected to the URL you set up, instead.

URL redirects can be great when used with:

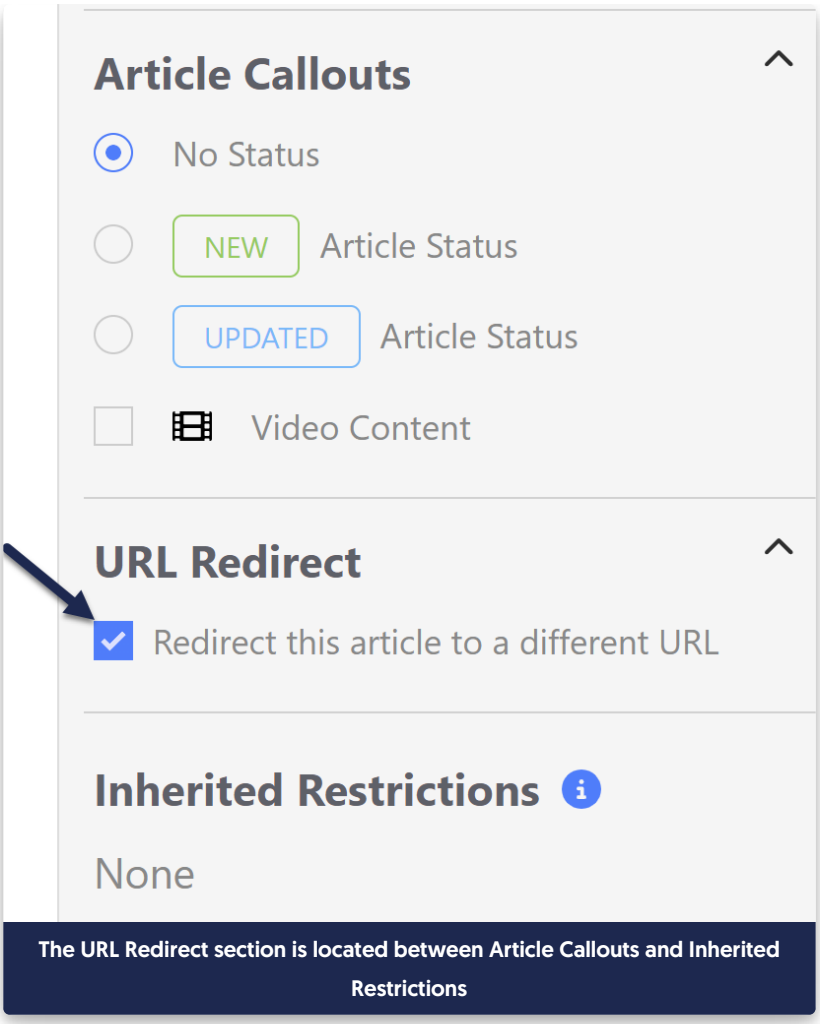
- Links to external sites/files you don't want or can't move into KnowledgeOwl
- Links to files stored within KnowledgeOwl, where you want the file to open directly (See the KnowledgeOwl W-9 for an example of this type!)



URL redirect articles will not display in the Popular Articles Report or the Published Articles with 0 Views report, since we do not currently track view data for this article type.

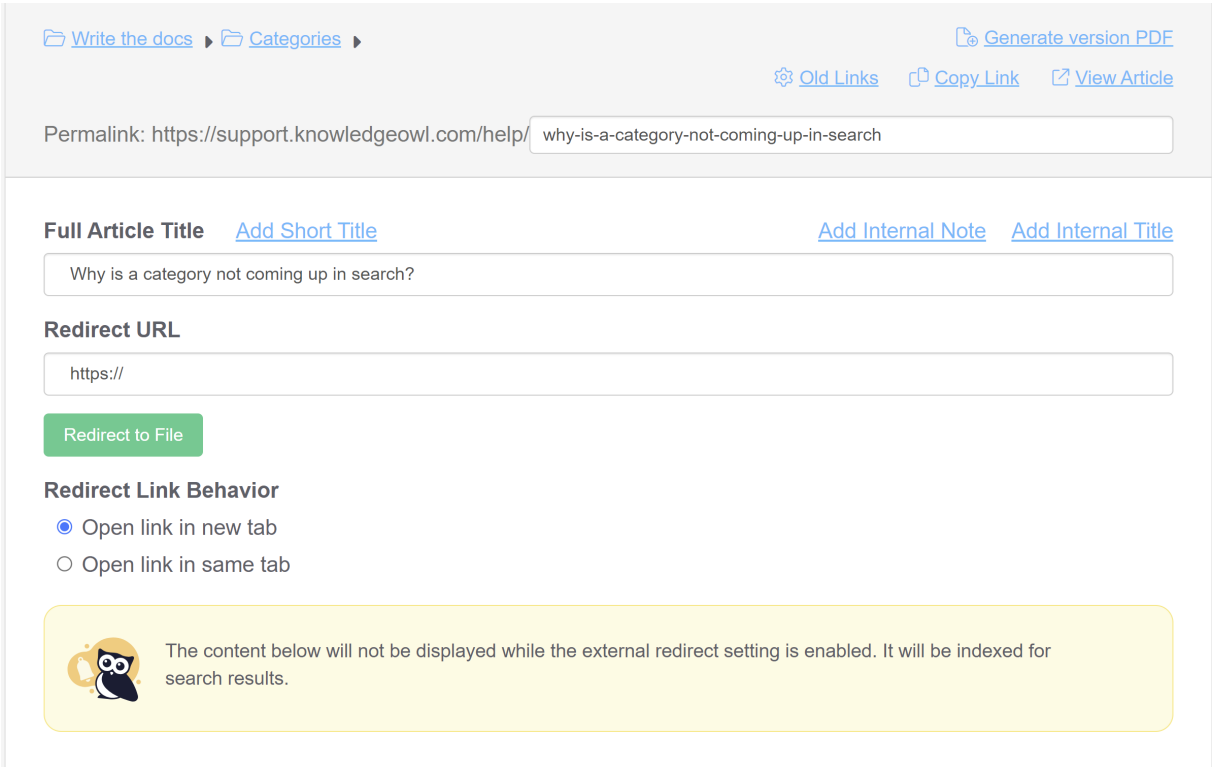
You can create a new article as a URL redirect or convert an existing article to be a URL redirect. To do so:

1. In the **URL Redirect** section of the righthand menu of the article editor, check the box next to **Redirect this article to a different URL.**



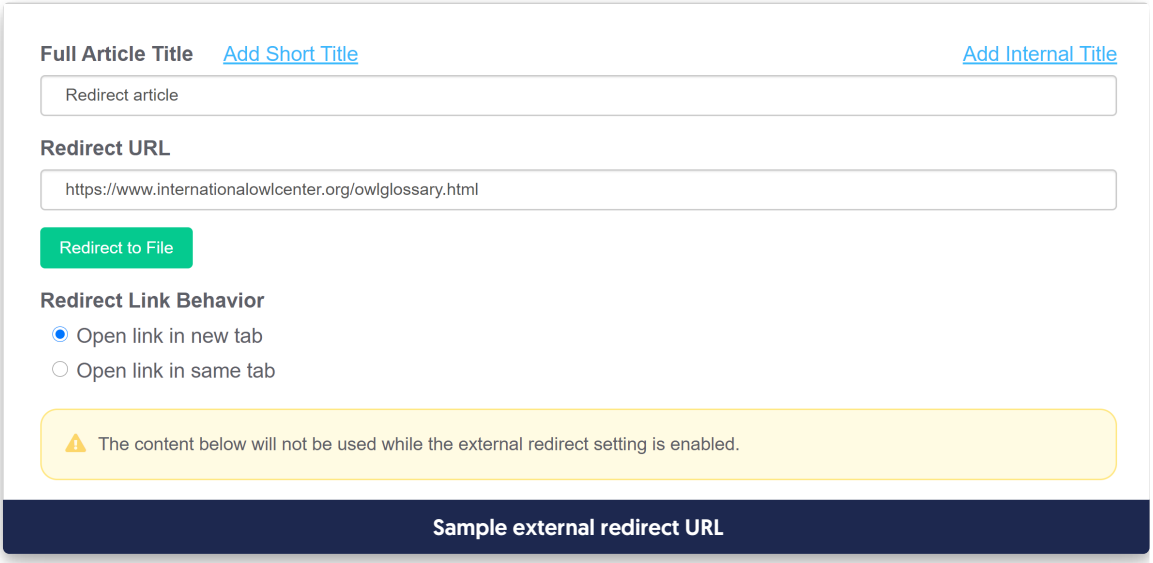
The URL Redirect section is located between Article Callouts and Inherited Restrictions

2. **Once checked, this will add a section between the full article title and the editor where you can add the URL you'd like to redirect to:**

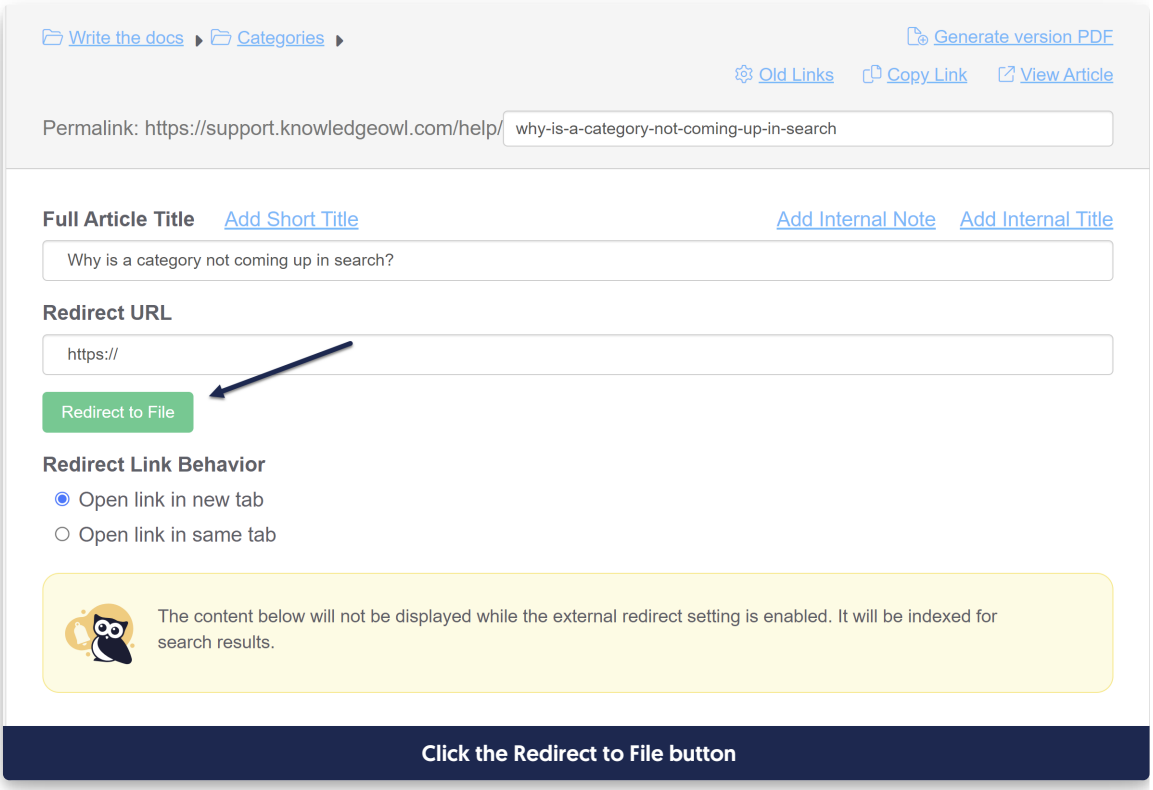


3. **Now, add the URL you'd like to redirect to.**

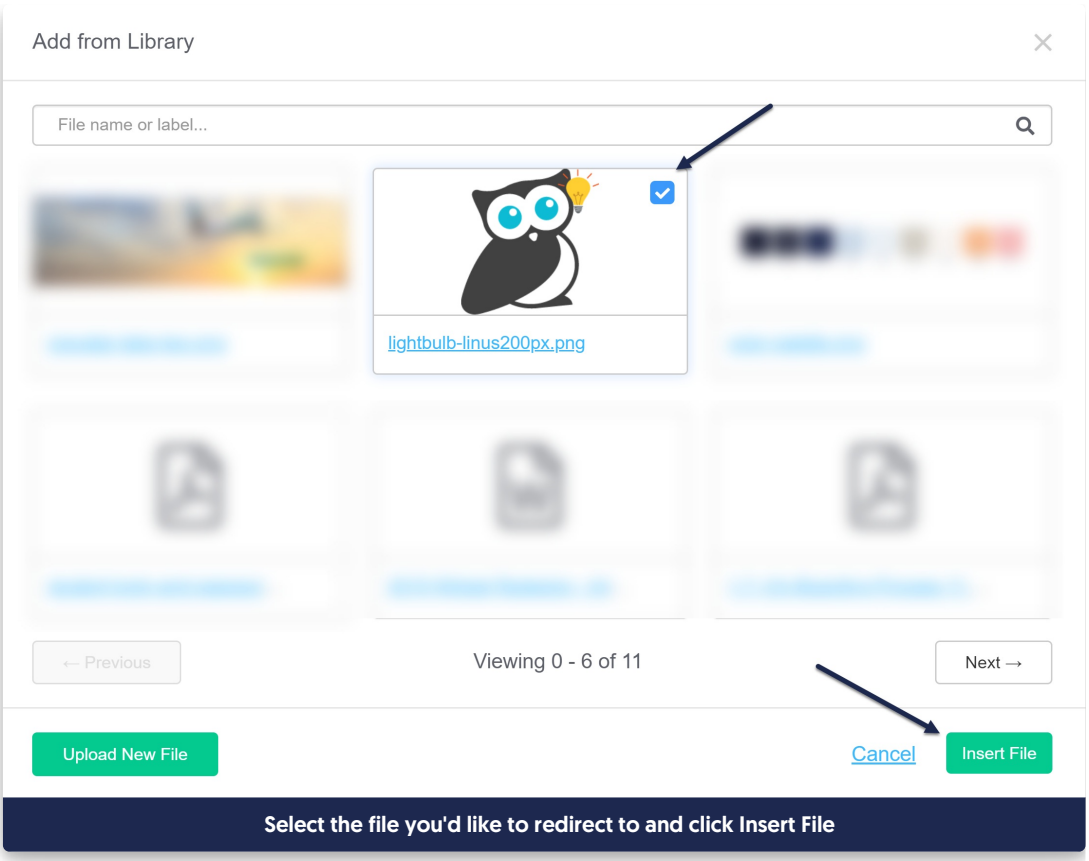
    a. **For external URLs, type or paste the URL you'd like to use into the Redirect URL field. Here, we're redirecting to the International Owl Center's Owl Glossary page:**



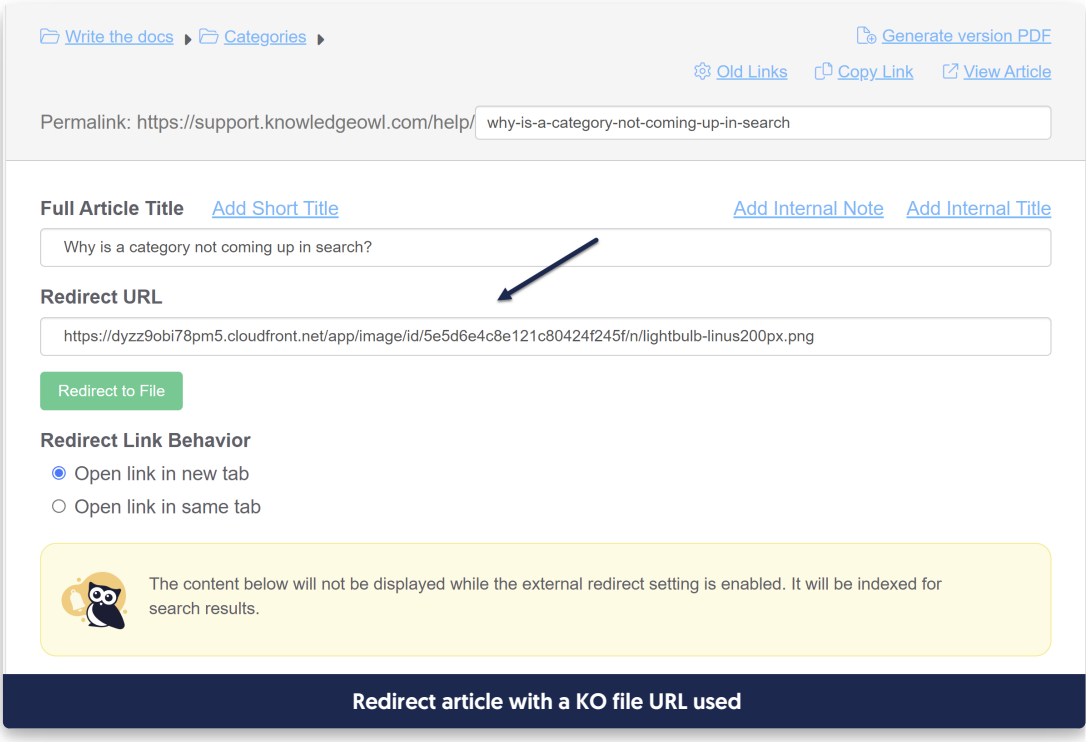
    b. **To redirect to a file uploaded to KnowledgeOwl (or to directly upload a file to KnowledgeOwl to redirect to), click the Redirect to File button:**



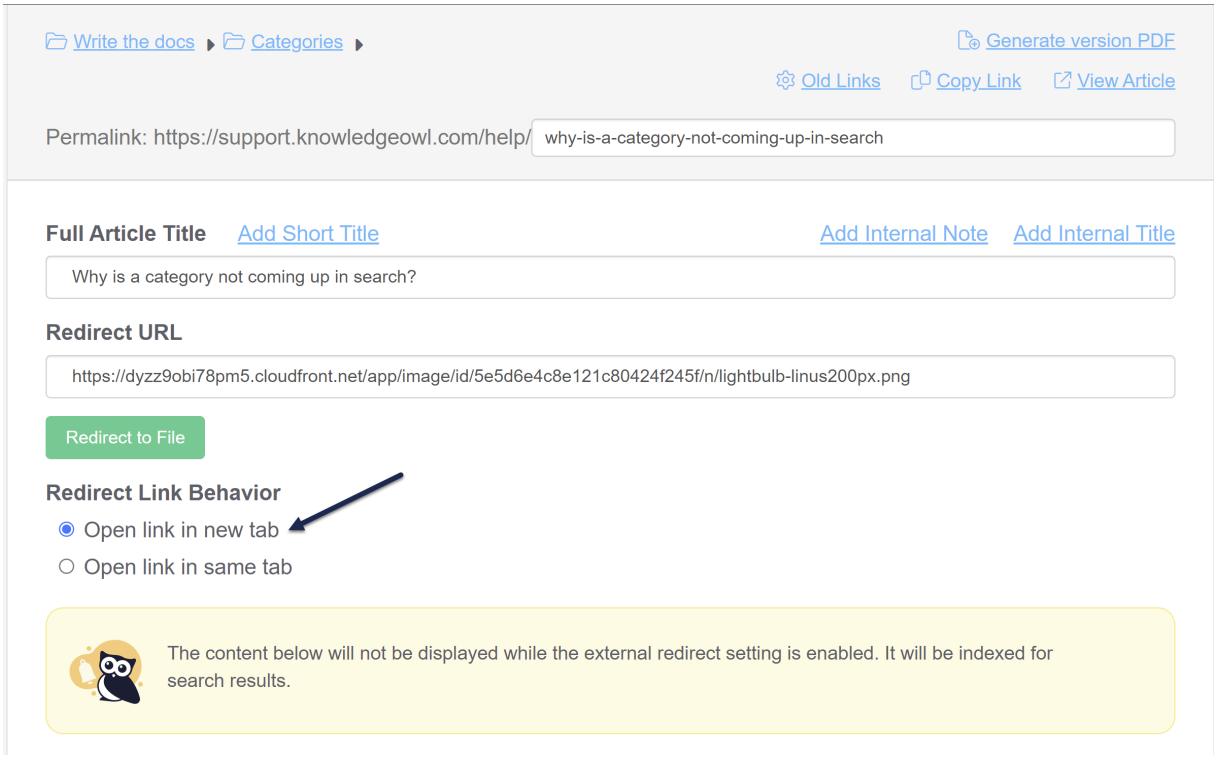
        i. **This will open an Add file from Library pop-up where you can select the file you'd like to insert. Browse or search for the file. (Or click Upload New File to add a new one.) Click on it to select it, then click the Insert File button in the lower right.**



ii. **The URL of the file will be added to the Redirect URL field:**



4. **Set whether you'd like the redirect link to open in a new tab or in the same tab. (Open link in new tab is used by default.)**



5. **Save** your article.

URL redirect articles do not work within topic display categories that use the Override Article Links setting. This is because the override gets applied before the URL redirect.

To switch an article from being a URL redirect to being a normal article, uncheck the "Redirect this article to a different URL" box. Once you save, the article will function normally and display whatever content is in the editor.

Anything included in the body of the article *will still be indexed for search* even though it won't be displayed. You can use this to your advantage to help provide additional words or terminology to help people find this article!

For example, if you're using a file stored within KnowledgeOwl, the content of that URL redirect file will not automatically be indexed for search. If you'd like it to be:

- **For PDFs, you can insert the PDF into the body of the article using the Upload File option. When you save the article, we'll scrape the contents of the PDF for search.**
- **For non-PDF files, you can open the file, copy text in it, and paste that into the article body. You don't have to worry about how weirdly it's formatted, since it's not displayed, but having the text here will help it get indexed for search!**

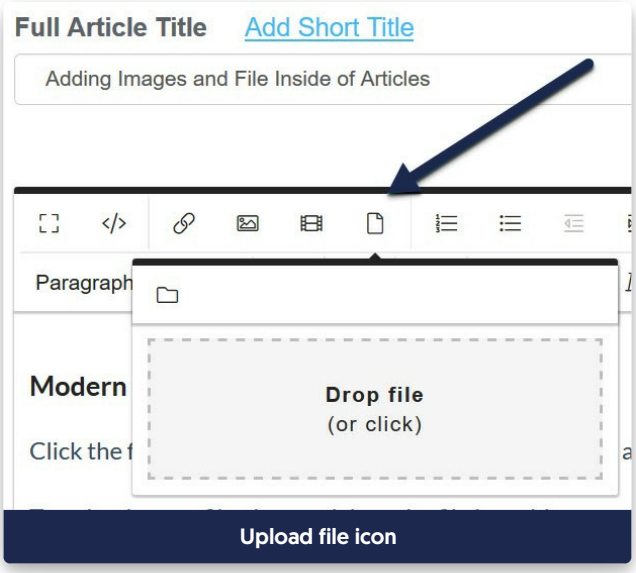
Add images and files to articles

Last Modified on 05/29/2024 5:27 pm EDT

Images, screenshots, and sample files can add examples and detail to your documentation. The process of adding files and images to articles differs a little between the Modern Editor and the Legacy Editor.

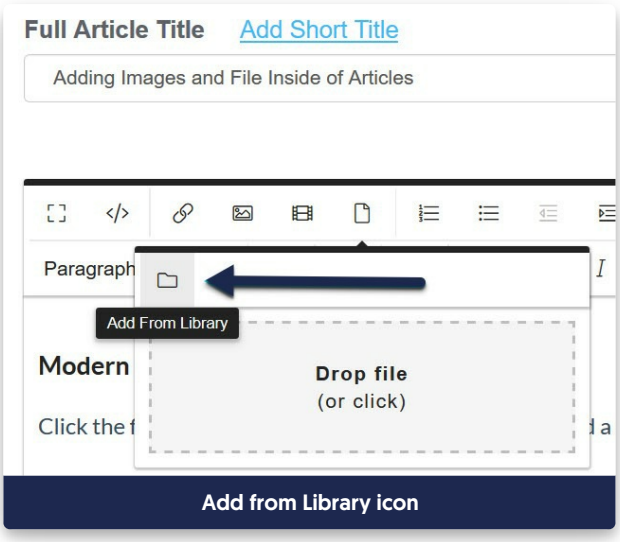
Modern Editor: files

Select the **Upload File** icon. You can choose to upload a new file or add an existing file from your library.

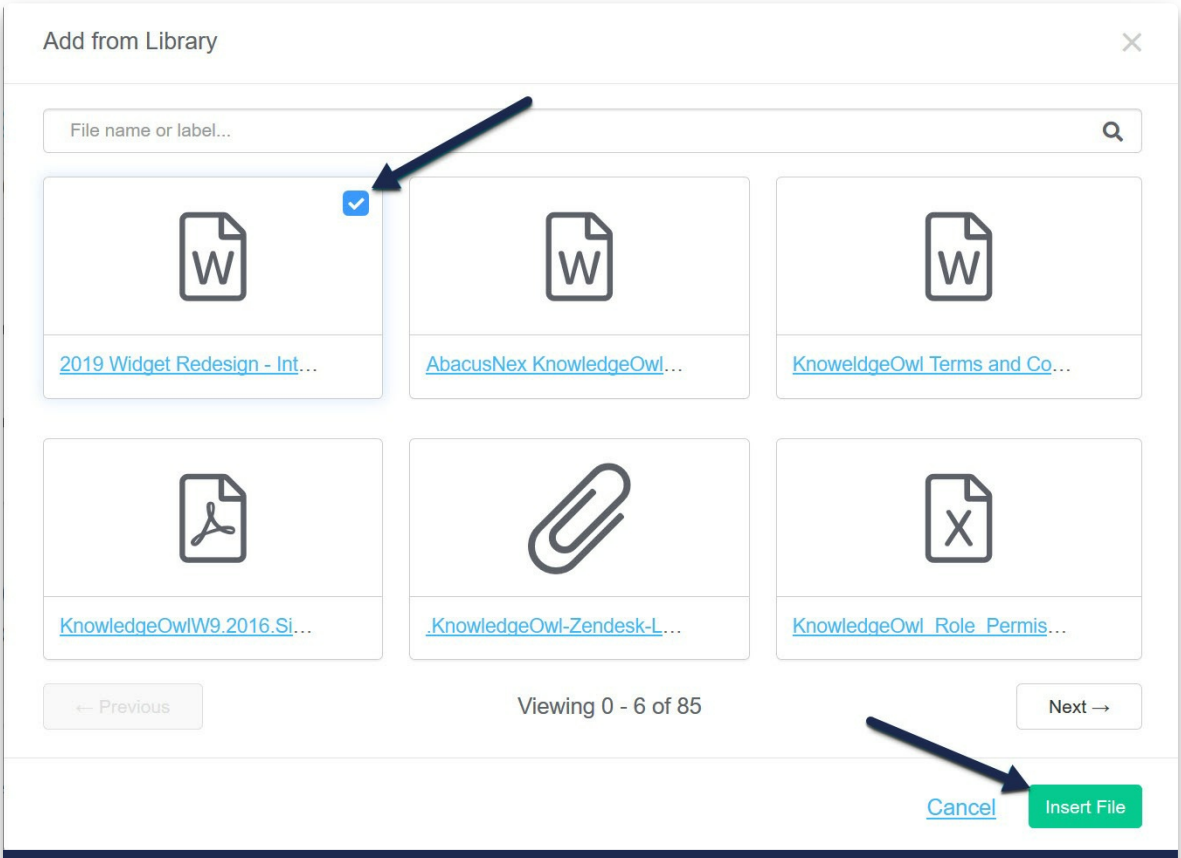


To upload a new file, drag and drop the file into this pop-up, or click anywhere in the **Drop file** box to browse to a file for upload.

To add an existing file from your library, select the **Add from library** icon.



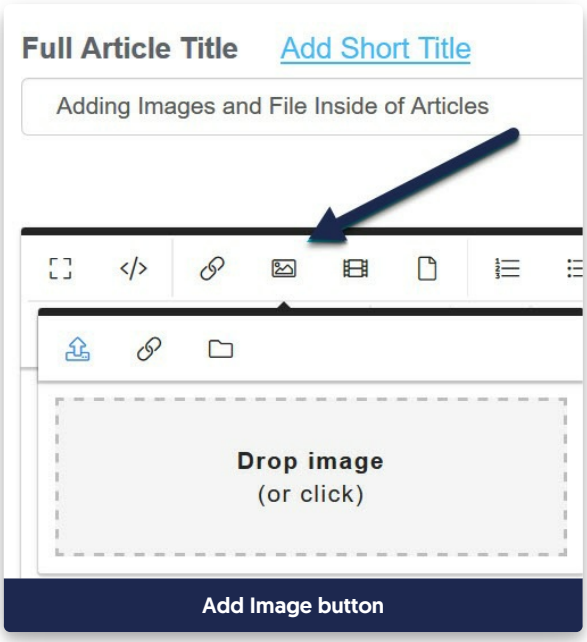
This will open a pop-up where you can search for files, with the most recent files first. Select the image you want to add, then select **Insert File**.



Add from Library pop-up

Modern Editor: images

To add images to your articles, select the **Add Image** icon, or use Ctrl + P.



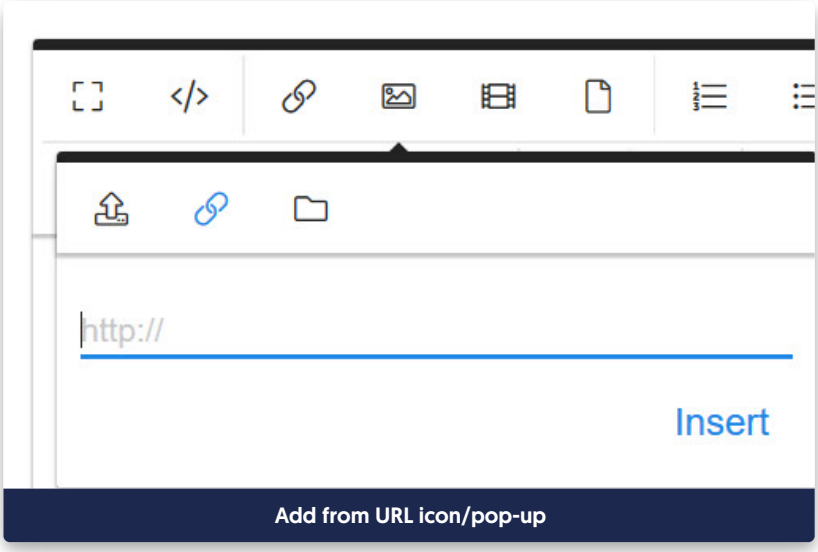
Add Image button

You can choose to upload a new image, add an image by URL, or add an existing image from your library:

- To upload a new image, click the icon with the arrow pointing up. You can drag and drop an image into

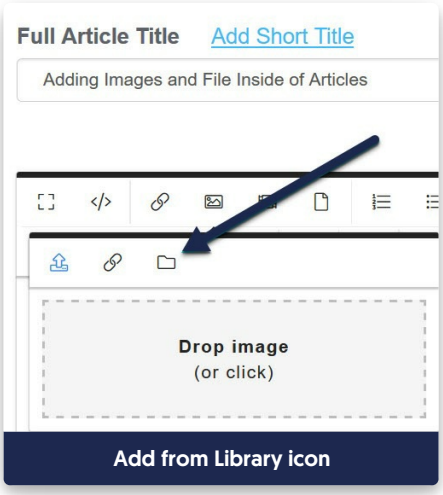
this pop-up, or click the window to browse to an image for upload.

- To add an image by URL, click the chain links, add the URL for the image, and select **Insert**:



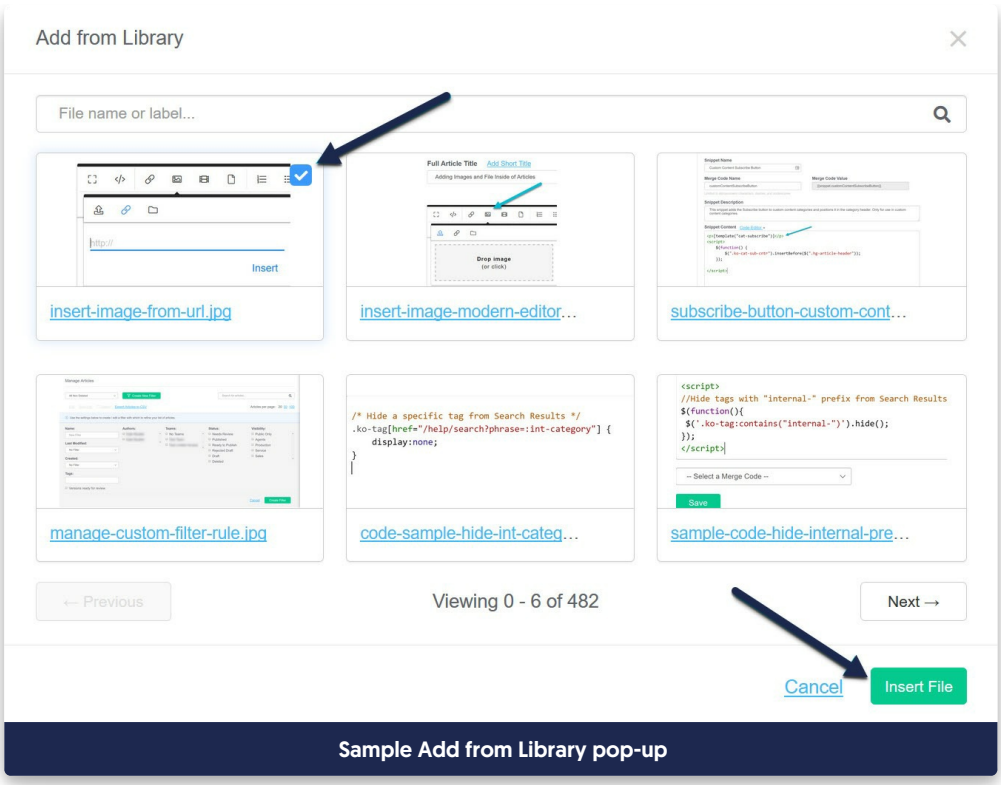
Add from URL icon/pop-up

- To add an existing image from your library, click the folder icon:



Add from Library icon

This will open a pop-up where you can search for files, with the most recent images first. Select the image you'd like to upload, then select **Insert File**.

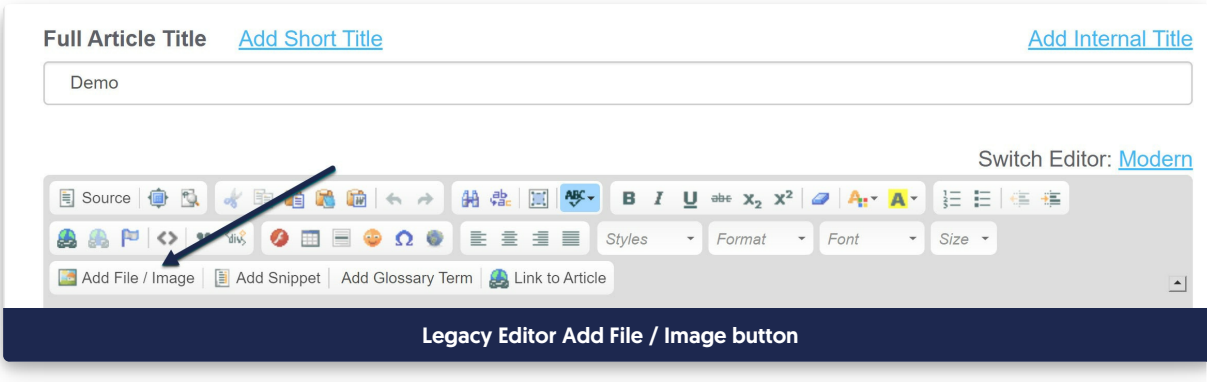


Sample Add from Library pop-up

Legacy Editor: images and files

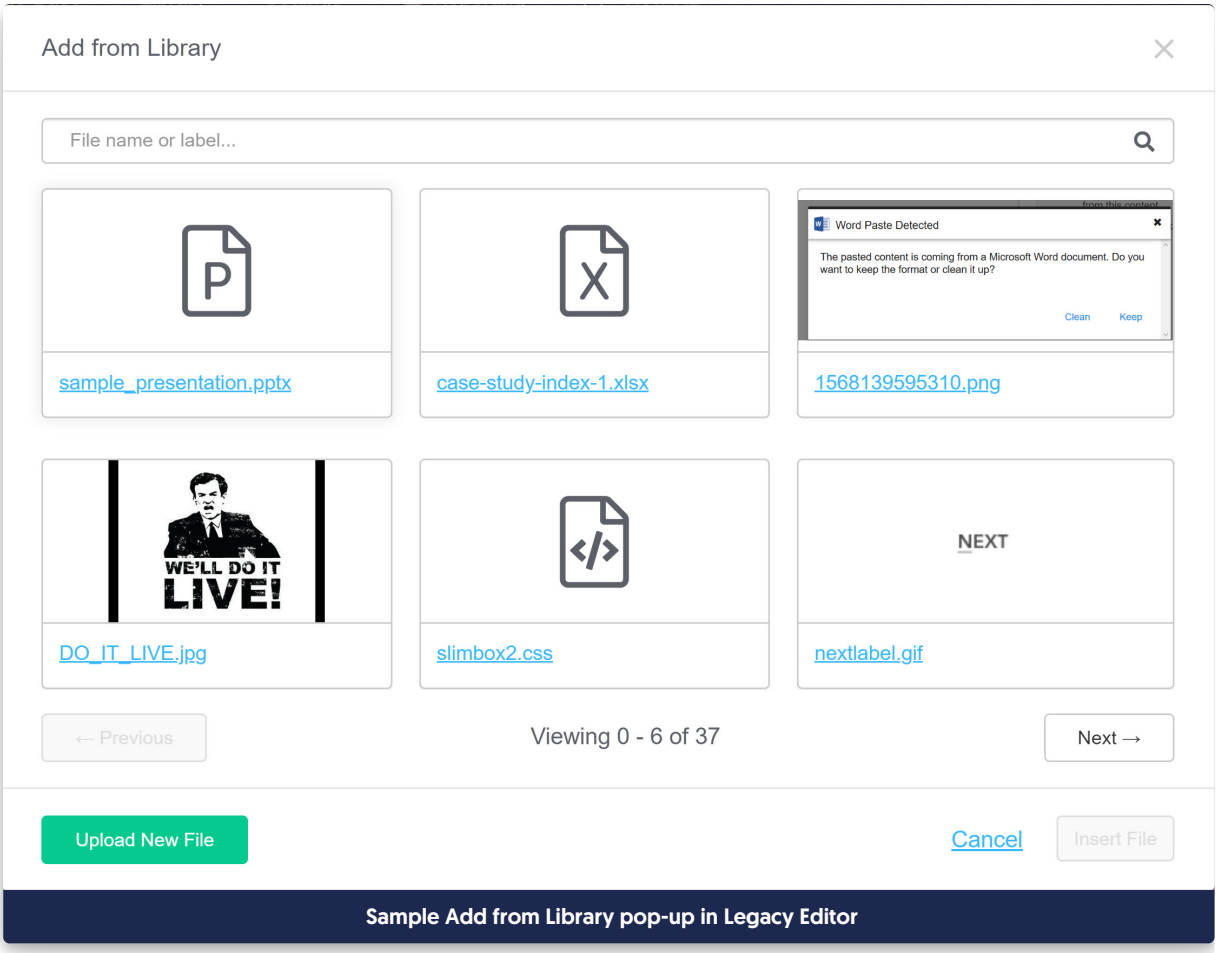
To add images or files into your articles using our Legacy editor:

1. **Open your article in edit mode.**
2. **Click on the Add File / Image button near the top.**



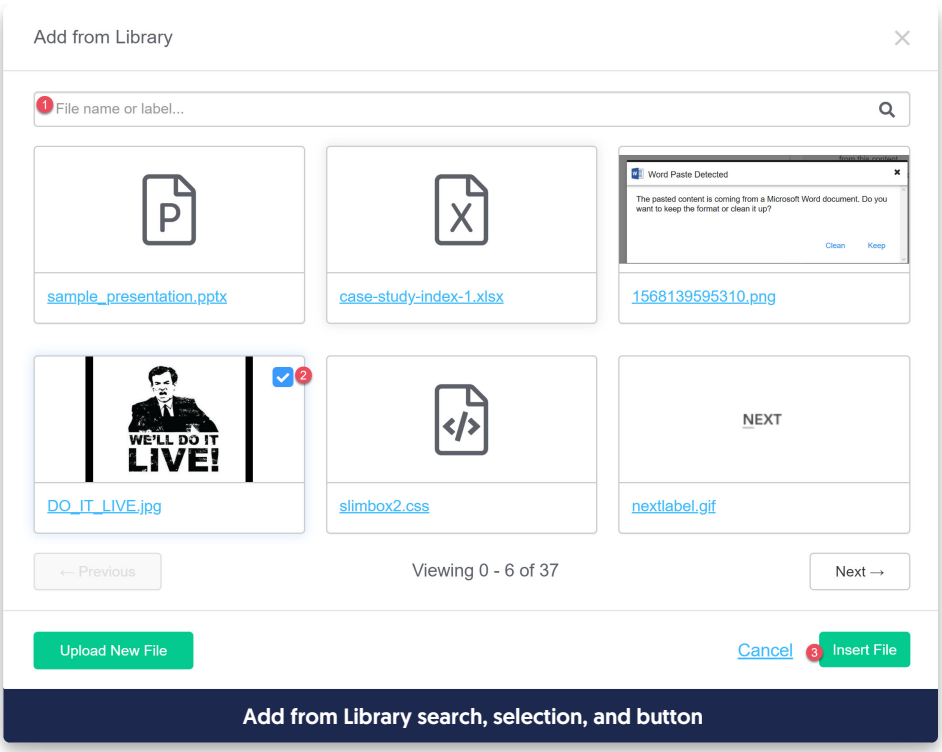
Legacy Editor Add File / Image button

3. **This will open the Add from Library pop-up, displaying the most recent files first.**



Sample Add from Library pop-up in Legacy Editor

4. **To use an existing file in the library:**
    a. **If necessary, use the search bar at the top to search for the file you want to add.**
    b. **Click on the file or image to select it.**
    c. **Click the Insert File button to insert the file into your article.**

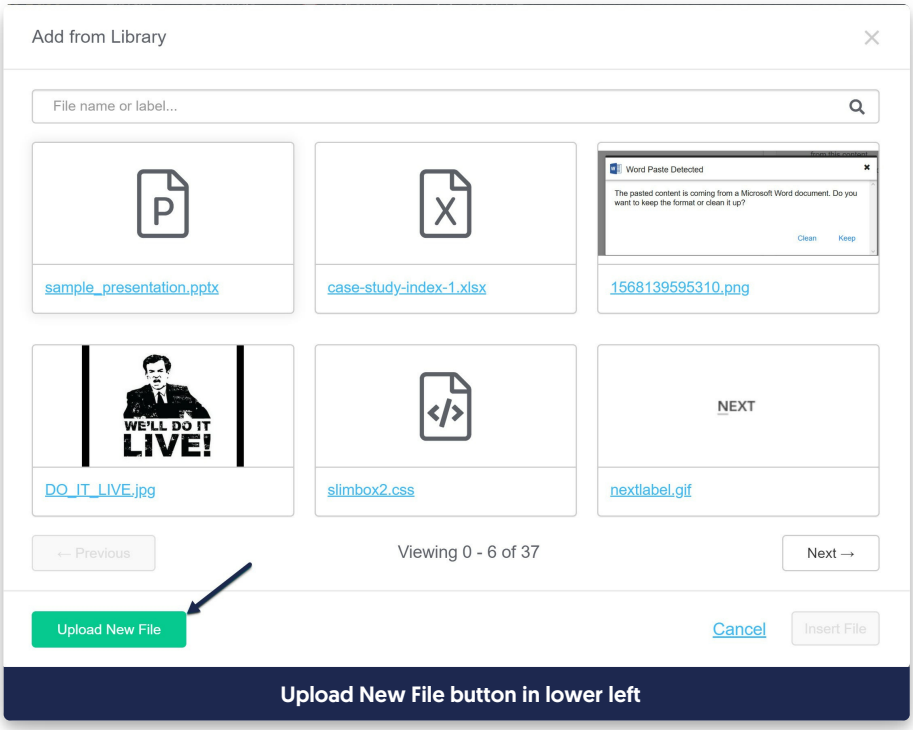


Add from Library search, selection, and button

d. Select **Save** once you've added the files or images you want.

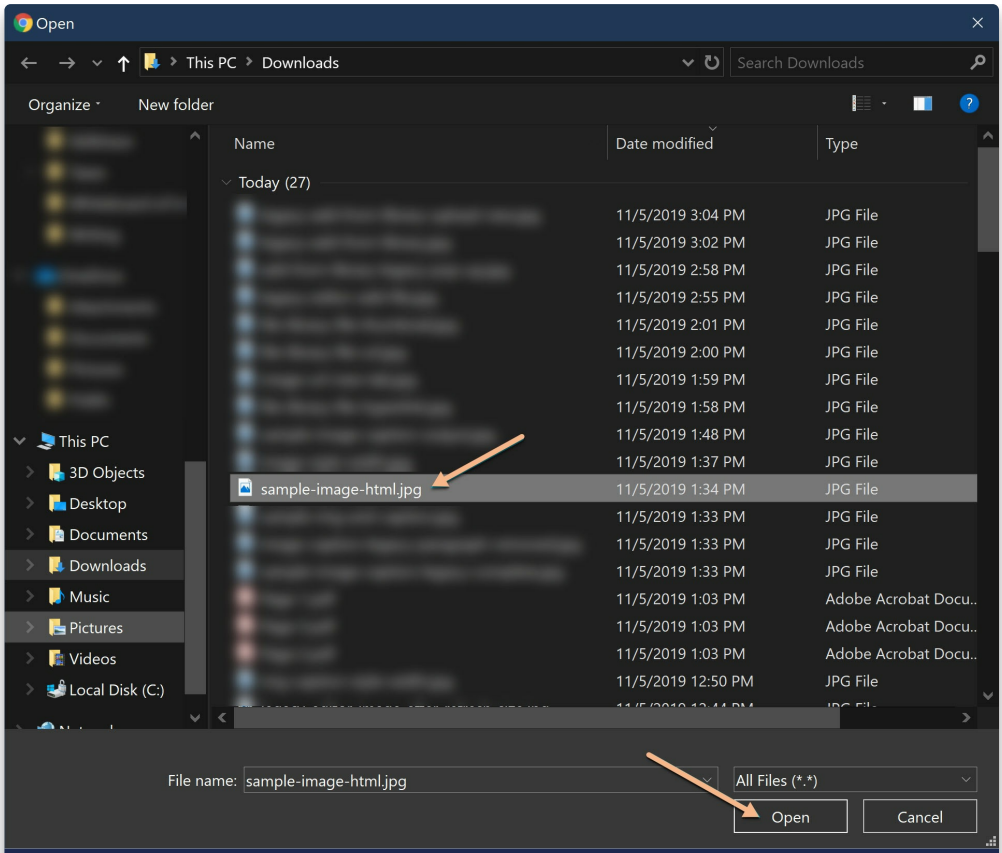
5. To add a new file to your article and the library:

   a. Click the **Upload New File** button in the lower left corner.



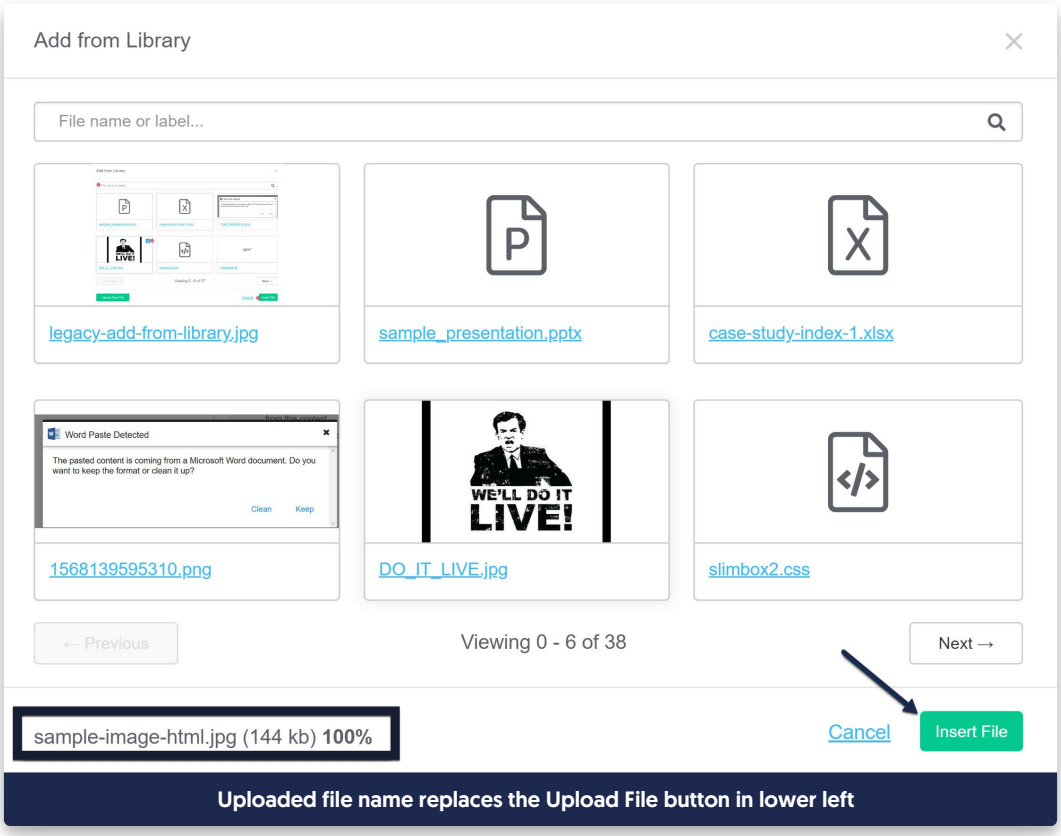
Upload New File button in lower left

   b. This will open an explorer window; navigate to the file you wish to upload, select it, and click the Open button in the lower right.



Sample explorer window to find and select the file you want to upload

c. **You'll see the name of the file you selected for upload in the lower left. Make sure it's what you wanted. Then click the Insert File button to insert the file into your article.**



Uploaded file name replaces the Upload File button in lower left

d. **Select Save once you've added the files or images you want.**

Edit and update files in articles

Last Modified on 12/05/2024 12:25 pm EST

Every file you add to an article in your knowledge base is stored in your File Library. If you'd like to update the name, the file itself, or the labels associated with the file, see Editing and updating files in the File Library.

You cannot ever edit the URL of a file.

Working with links to other websites

Last Modified on 12/05/2024 12:24 pm EST

There are two different ways you can link to websites outside of KnowledgeOwl:

- URL redirects, in which an entire article or category in your knowledge base redirects to another site
- links included within the text of an article

This article will walk you through working with both types of links.

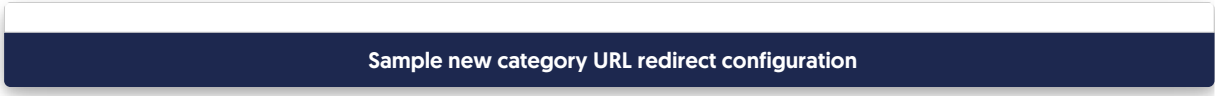
URL redirects

In some cases, you may want clicking on an article or category in your knowledge base to redirect someone to an external website, such as your company's employee portal or help desk. To get this behavior, you'll set up the content as a URL redirect. You can set up redirects at the category and article level.

Category URL redirects: New category

You can create a new category from scratch as a URL redirect by checking the URL Redirect option when you create the category. To do so:

1. Select **+ Add Category** or **+ Add Subcategory**.
2. In the **Add Category** modal, enter a **Category Title** for your category.
3. In **What style of landing page do you want?**, select **URL Redirect**.
4. An **External URL** field appears. Enter the URL you want to redirect the category to in that field:



Sample new category URL redirect configuration

5. If you select **Quick Add**, the category will be set to open the URL in the same tab. To set it to open in a new tab, select **Add and Edit**.
6. When the category editor opens, use the **Redirect Link Behavior** controls to set whether opening this article will open the URL in a new tab or the same tab.
7. Once you **Save**, anyone opening this category will be redirected to the URL you've entered in the Redirect URL, in the tab selected as the Redirect Link Behavior.

For example, this category will redirect to the KnowledgeOwl pricing page:



Sample category editor with URL redirect configured

Category URL redirects: Update existing category

You can convert any existing category to a URL redirect by changing the **Category Type** dropdown. If your existing category has subcategories or articles in it, though, this may make it hard for people to navigate to that content.

Article URL redirects

To set up a URL redirect article:

1. Create the article as you would normally.
2. In the article editor, check the box under **URL Redirect:**



3. Two new fields display under the **Full Article title: Redirect URL** and **Redirect Link Behavior**.



4. Enter the URL you want this article to redirect to in the **Redirect URL** field.
5. Use the **Redirect Link Behavior** options to control whether the URL redirect will **Open link in new tab** or **Open link in same tab** (default).
6. Once you've filled out both fields, be sure to **Save** your changes.



Article content won't be displayed
As the warning on this page says, any content in the editor win;t be displayed when a URL redirect has been enabled. It will still be indexed for search though.

Insert link to another website in your article body

To insert links to other websites:

1. Open the article for editing.
2. Select the **Insert Link** button (two chain link icon) or press Ctrl + K on your keyboard:



3. A modal opens where you can enter the information for your link:
4. Enter the **URL** the site you wish to link to.
5. Enter the **Text** for the link you'd like displayed in the article.
6. *Optional:* Enter the text that will be displayed when a reader hovers their mouse over the link in the **Title**.
7. *Optional:* If you'd like to reference this link as an anchor for quick navigation/to link from somewhere else, enter a non-space-containing **Name** for the link. You can link to this link using #Name at the end of

the article's URL.

8. By default, when a reader opens this link, the link will open in the same tab. To change this behavior, check the **Open in new tab** box.

9. Once you've set the traits for your link, select **Insert**. Your link should now be visible. You can select the link to open the link context menu, which lets you open the link, edit it, and unlink it.

10. Be sure to **Save** your changes.

Here's a sample link: See how amazing owls are

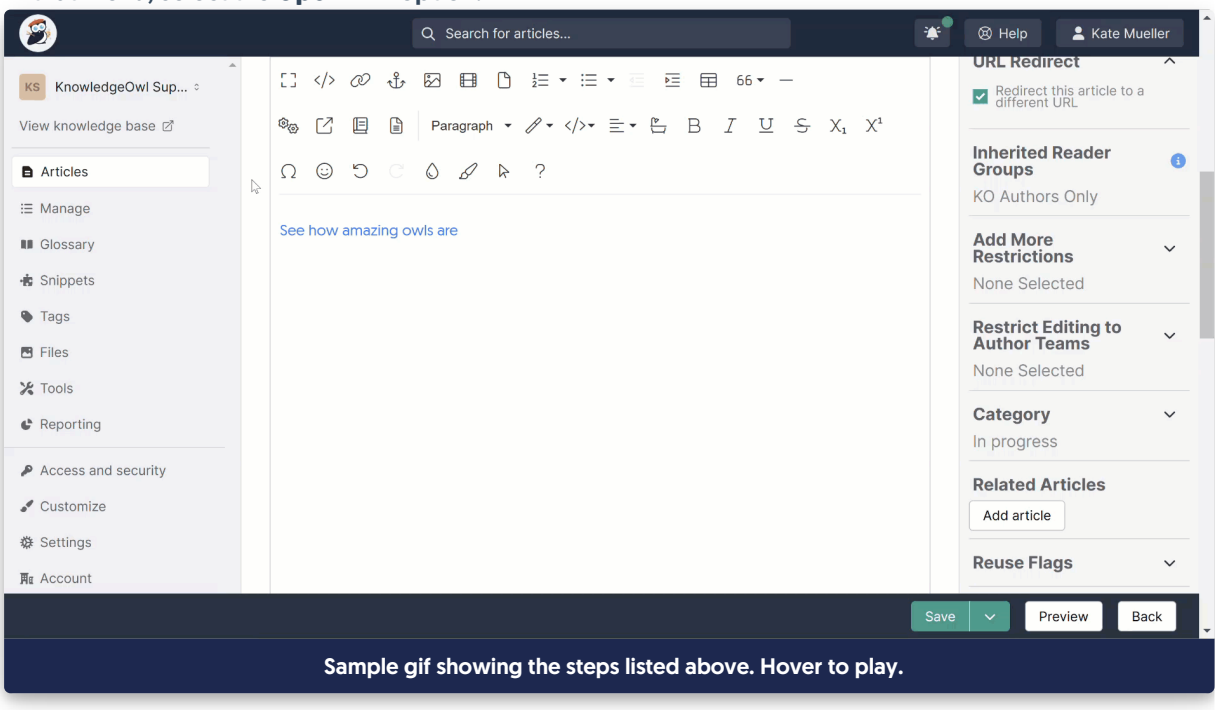
Save time with Text
If you already have a line of text in your article you want to use for a link, you can highlight that text before you select **Insert Link**. The Insert Link modal will autopopulate the **Text** field using the highlighted text.

Test links

Once a link is in an article, you can confirm that it's opening to the correct URL by opening it:

1. Select anywhere in the text of the link to display the link context menu.

2. In that menu, select the **Open Link** option.



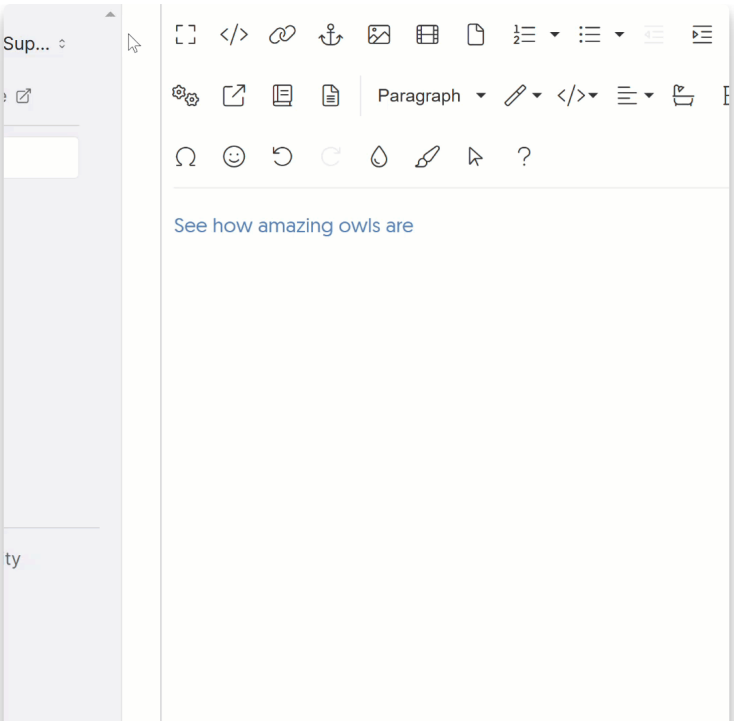
Sample gif showing the steps listed above. Hover to play.

Edit links to other websites

You can edit any link you've already inserted to update any of those link fields:

1. Select anywhere in the text of the link to display the link context menu.

2. Select the **Edit Link** option.



3. Make any changes you need and select **Update**.

Remove links

If you want to remove a link from your article, we recommend unlinking first and then deleting the text (or not, if you want to keep the text!). To do so:

1. Select anywhere in the text of the link to display the link context menu.
2. Select the **Unlink** option (link icon with a slash through it).

Use action links with # or javascript:void(0)

Last Modified on 05/29/2024 5:28 pm EDT

Sometimes, hyperlinks are used to trigger a particular action rather than opening to a given page or resource (such as opening the widget Open widget to a specific article or category.)

If you've imported content from somewhere else, there is a chance you may have added links with this format (or you may have them there on purpose for specific functionality!).

Standard conventions for these types of hyperlinks are to set the link's URL to be either `#` or `javascript:void(0)`.

The problem

Our editor will usually try to encode that HTML on-save, so instead of getting `javascript:void(0)`, it gets converted to `javascript%3Avoid(0)`, which breaks the link's underlying action.

Solutions

There are two ways to resolve this issue:

1. Adjust the link URL to use `#` instead.
    a. This can typically be used in exactly the same way as javascript:void(0) and won't be stripped out by the editor.
2. Create a snippet that contains the `javascript:void(0)` text and use that snippet merge code as the URL for these links.

We recommend using the first approach wherever possible, since it is very simple and you can quickly update the URL directly in the article editor. But if you'd like to try the second:

1. Go to **Library > Snippets**.
2. Select the **+ Create New Snippet** button.
3. When the create snippet page appears give your snippet a **Name**, like Javascript Void.
4. Add a snippet **Description**.
5. Next to **Snippet Content**, select **Code Editor** from the dropdown:

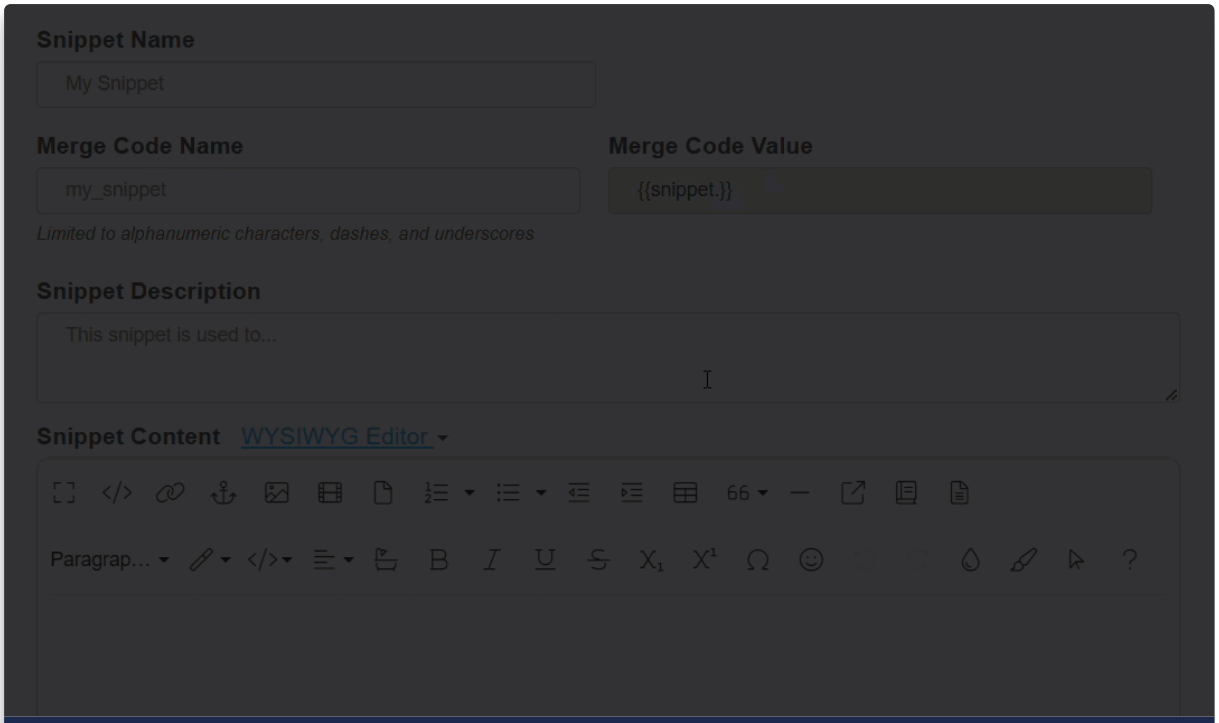


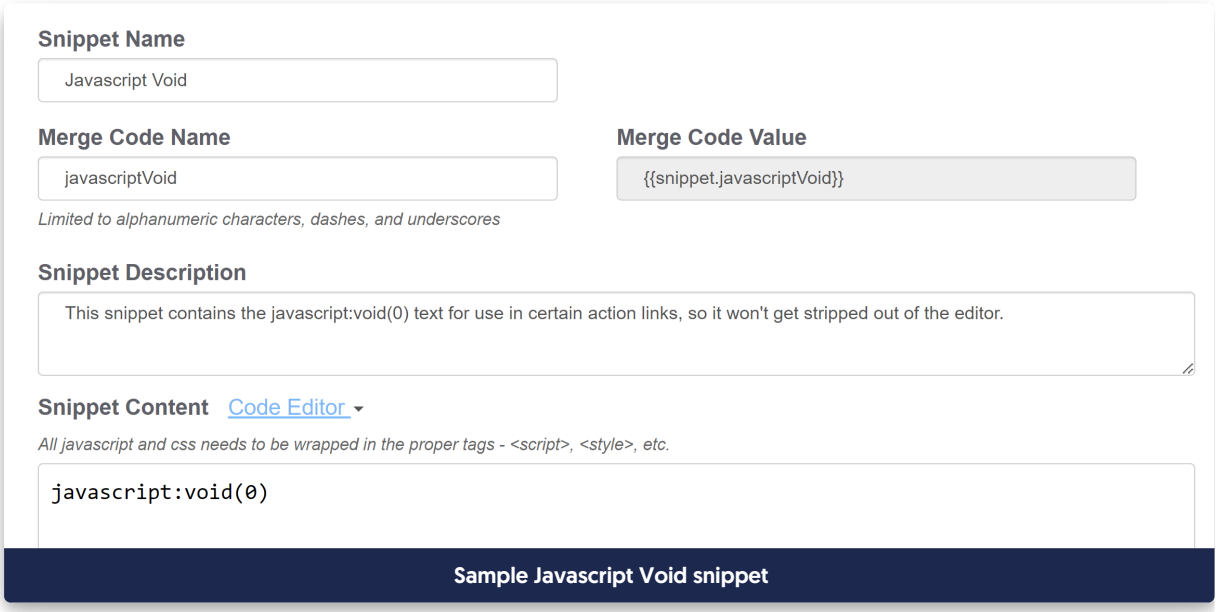
Image Caption

6. **Copy the code below and paste it into the Snippet Content editor.**

```
javascript:void(0)
```

7. **DO NOT toggle the Snippet Content back to WYSIWYG Editor; keep it in Code Editor.**

8. **Your final snippet should look something like this:**

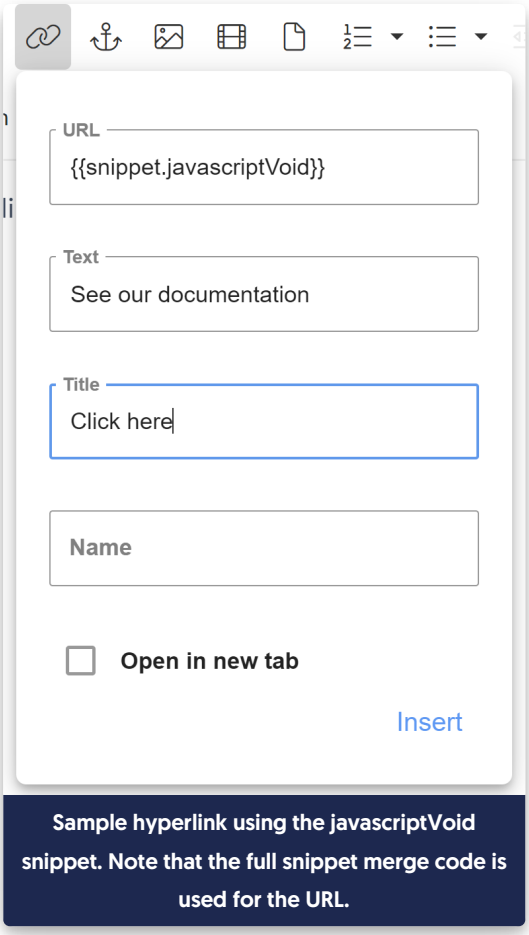


Sample Javascript Void snippet

9. **Once you're done making changes, select Create to finish creating your snippet.**

With your snippet created, you can use the full merge code as the URL for any hyperlink that you want to use

javascript:void(0) in, like this:



Sample hyperlink using the javascriptVoid snippet. Note that the full snippet merge code is used for the URL.

Edit permalinks

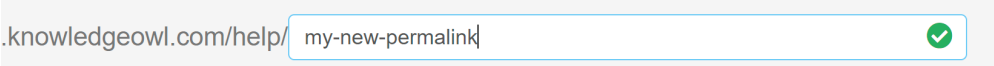
Last Modified on 05/29/2024 5:28 pm EDT

When you make changes to a permalink, there are a few considerations:

- Is the new permalink valid? (Does it avoid duplicating another permalink, contain valid characters, and so on?)
  See below for the direct editor feedback KnowledgeOwl offers to help with this question!
- If the content is published, should you redirect readers from the old permalink to the new one?
  See our functionality on Old Links to manually or automatically add redirects for previous permalinks!

When you edit a permalink for a category or article, we'll provide some visual feedback as to its validity.

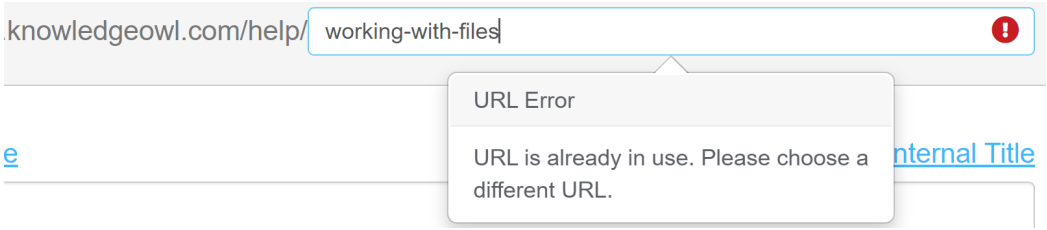
A green checkmark means it's available:



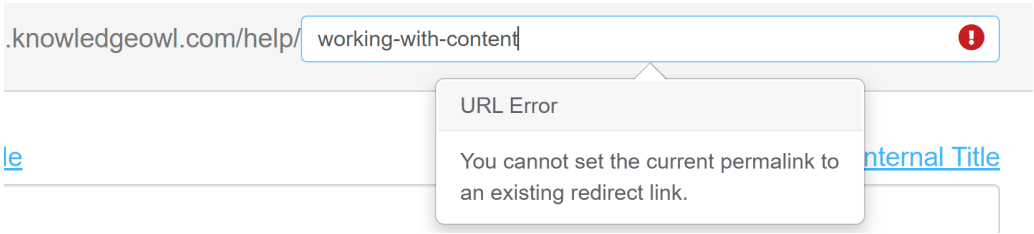
A red exclamation point means it cannot be used. The Save button will be disabled and you'll see a popover to provide more information about why it can't be used.

Here are some examples:

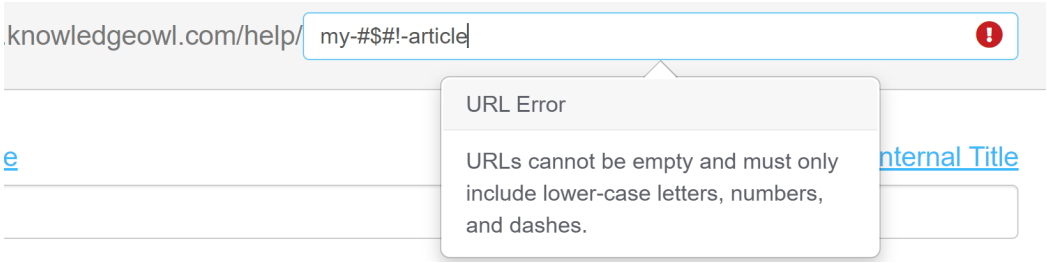
- Permalink duplicates a permalink that exists somewhere else:



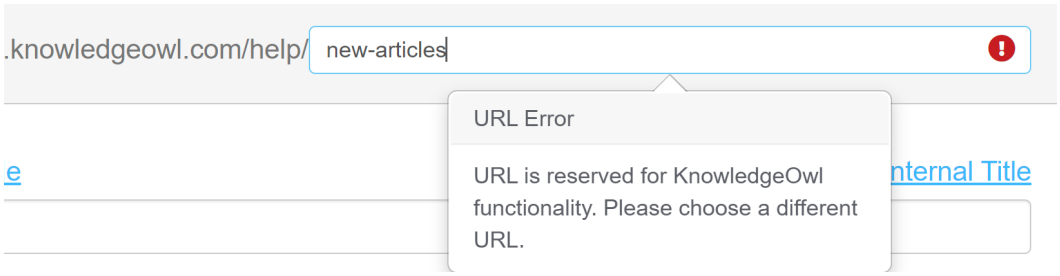
- Permalink matches one of this article or category's existing old links, which can create an infinite redirect loop:



- Permalink contains invalid characters:



- Permalink matches something KO reserves for built-in functionality:


.knowledgeowl.com/help/
new-articles
URL Error
URL is reserved for KnowledgeOwl functionality. Please choose a different URL.
e
nternal Title

Add anchors within articles

Last Modified on 05/29/2024 5:28 pm EDT

Anchors are a great way to navigate between or link to specific sections in your article, like manually inserting invisible bookmarks. To use anchors, you'll need to:

1. **Create the anchor itself:** this is a hyperlink with an id. The id is the URL hash that will be the anchor.
2. **Insert a link pointing to the anchor:** For same-page links, add a link that starts with # followed by the id. For links to anchors on other pages, use the full link with # and the id.

So if I create an anchor with id=troubleshooting-tips, the hyperlink I insert to navigate to it would be #troubleshooting-tips.

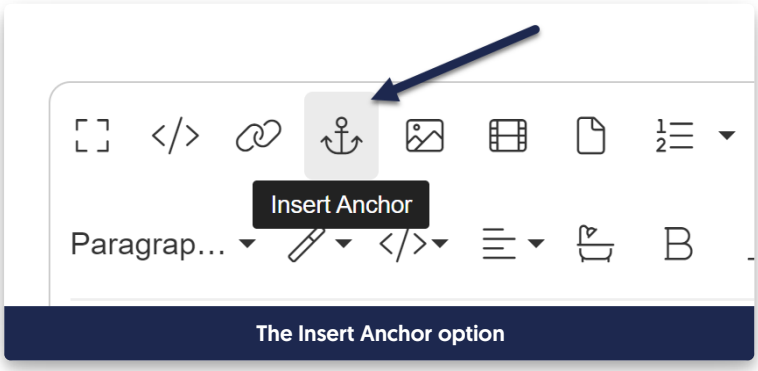
Thankfully, we have a tool to create the anchor, but you will need to create the hyperlink to jump to it!

If you're thinking of using anchors to create clickable navigation like a table of contents at the top of a long article, consider using a Topic Display category. Or try our Article Table of Contents snippet instead! It will update automatically as you add and edit content.

Creating anchors

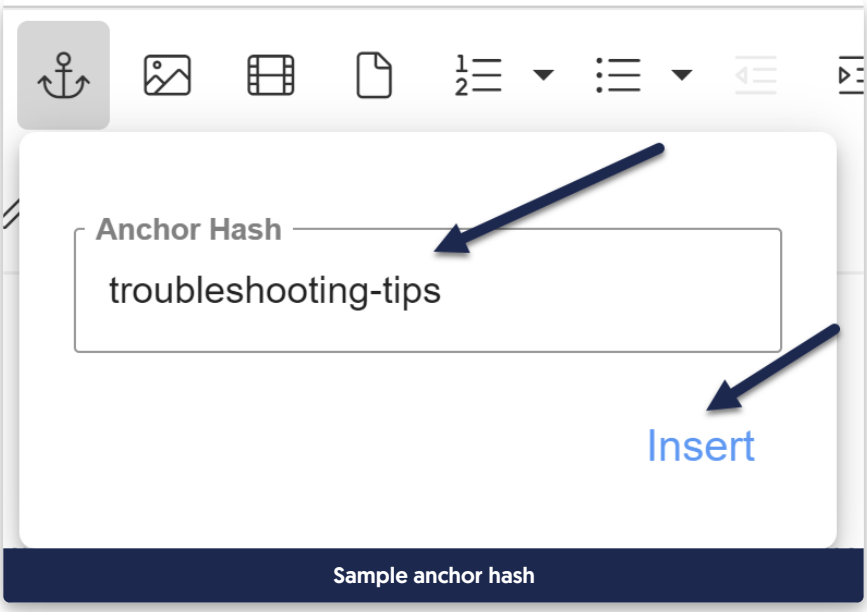
To create an anchor in an article:

1. Put your cursor where you'd like to add the anchor.
2. Select the **Insert Anchor** option (which is in the shape of an anchor, between Insert Link and Insert Image)



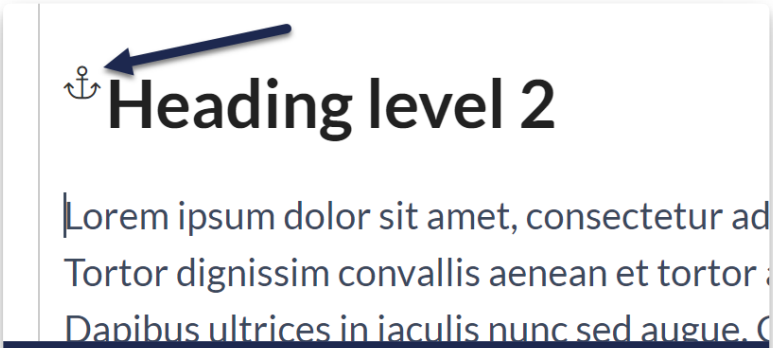
The Insert Anchor option

3. This will open a small pop-up where you can type in the **Anchor Hash** you'd like to use. This is the id for the anchor. It can only contain numbers, letters, -, and _.
4. Once you've finished adding your anchor hash, select **Insert**.



Sample anchor hash

5. The editor will display an anchor icon where you added the anchor. You can click on this icon at any time to review or edit the anchor hash, or remove the anchor entirely. (This icon will **not** be displayed in the live article, only the editor!)



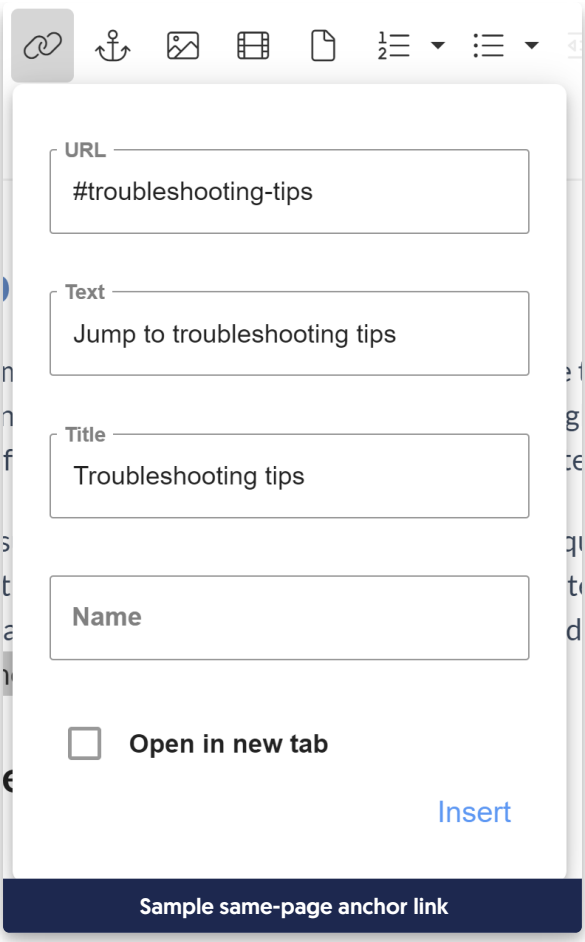
Sample anchor icon in editor showing there is an anchor here

6. Select **Save**.

Once that anchor exists, you can insert links to it either from the same article or from a different article.

Insert a link to an anchor within the same article

1. Select **Insert Link**.
2. Type the anchor hash into the **URL** field, and add a # in front of it (for example, #troubleshooting-tips).
3. Type the text you want to display for the link into the **Text** field (for example, Jump to troubleshooting tips).



Sample same-page anchor link

4. If you'd like any text to display when someone hovers over the text, enter that text into the **Title** field.
5. Be sure to **Save** your changes.

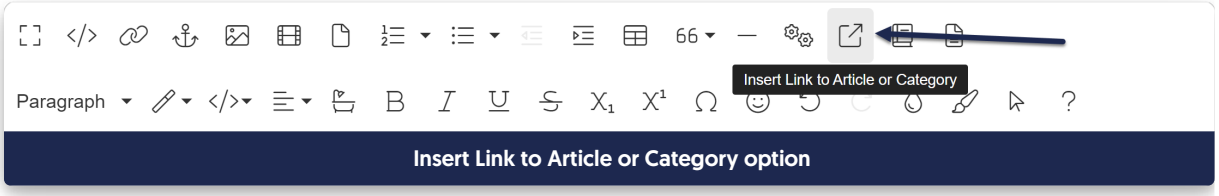
Insert a link to an anchor in another article

Before you start, you'll need to know:

- The anchor hash
- The article's name

Once you have this information handy:

1. Open the article where you want to add the link for editing.
2. Select **Insert Link to Article or Category**. See Link to article or category for more information on this feature.

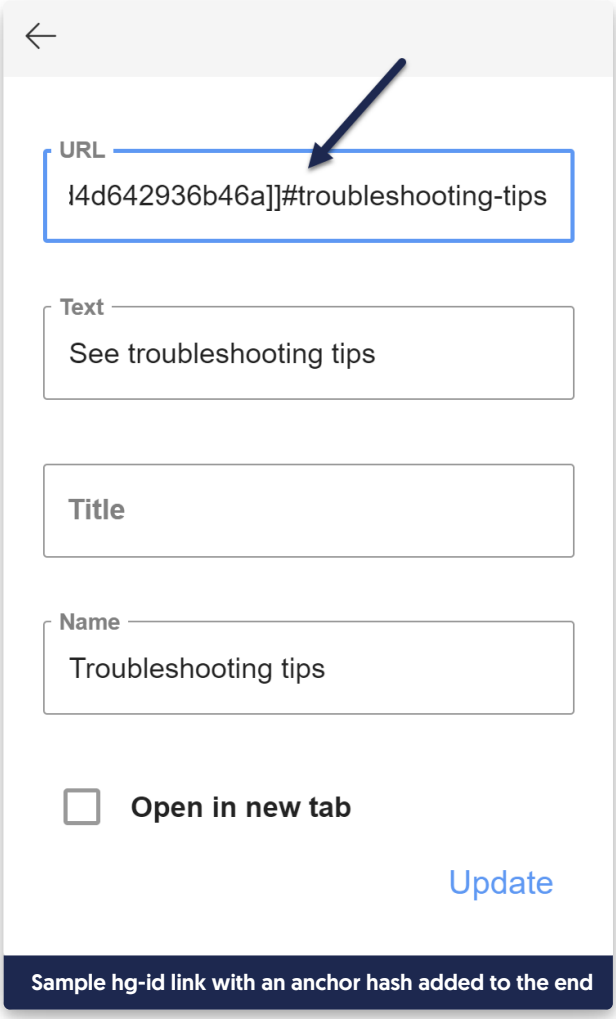


Insert Link to Article or Category option

3. Type the name of the article you want to link to and set the link text. Insert the link.
4. Then click the link and select **Edit Link**.

5. In the **URL** field you'll see an #badLink field rather than a true URL. This is how we handle references to other KnowledgeOwl articles.

6. Add a # and the text of the anchor hash (for example, #troubleshooting-tips) after the closing] bracket for the hg-id:



Sample hg-id link with an anchor hash added to the end

7. Select **Update** to save your changes.

8. Be sure to **Save** your article once you're done!

Use cases

Most commonly, anchors are used to handle navigation within or between articles. If you're trying to create a set of clickable headings like a table of contents at the top of an article, see Article Table of Contents or Topic display categories. But they can be great for quick navigation back to the beginning of an article, or for getting people directly to an often-used section.

Case one: quick navigation

Linus, our trusty Owl Documentarian, knows that some steps aren't always completed in order. Some articles have multiple headings and subheadings and he wants to be sure that people can easily find referenced steps or information.

For these kinds of articles, inserting a link to an anchor in the same article allows him to quickly cross-reference concepts in the same article and encourage exploratory navigation.

Case three: frequently-referenced information

There are some steps or pieces of information in the middle of an article that Linus finds himself sending to readers often. In his article "Your first 2 weeks as a KnowledgeOwl owl," he finds that owl recruits often need to be reminded to "Always look before you leap." An anchor is a fast and easy way to handle this. Now, instead of telling his owl recruits to go review the entire article, or to scroll to the "Always look before you leap" section, he can give them an explicit link to myknowledgebase/help/first-2-weeks#look-before-you-leap.

So instead of telling you to go find our "It's Owl Good" article and read the bottom about search feedback, we can just send you straight to the feedback section: https://support.knowledgeowl.com/help/its-owl-good#search-feedback

Let us know if you're using anchors in other ways that would make good use cases!

Add code samples

Last Modified on 12/05/2024 12:36 pm EST

Sometimes you may want to display code for your readers to copy and paste from an article. Here's how:

1. Select **Code View** in your WYSIWYG editor.
2. Paste the code you want to display into the code view.
3. If you're using our default syntax highlighter, wrap the code using the following format: `<pre><code data-language="language"></code></pre>` tags.
    a. If you're using a custom syntax highlighter, most of those use code class="language-xxxx" or a similar format. Check with the syntax highlighter you're using!
4. Replace "**language**" with the language of the code. For example, the code block below will highlight Javascript syntax:

```
<pre>
  <code data-language="javascript">
    &lt;script&gt;
    alert("Hello, World!");
    &lt;/script&gt;
  </code>
</pre>
```

And produce this treatment using the default syntax highlighting:



Scripts and other HTML
If you're adding code wrapped in <script> tags, encode the greater than and less than signs around the opening and closing script tags so that the code doesn't execute (as is shown above). Use this online tool to encode your script. Be sure to check the box to **Encode the less than and greater than sign.**

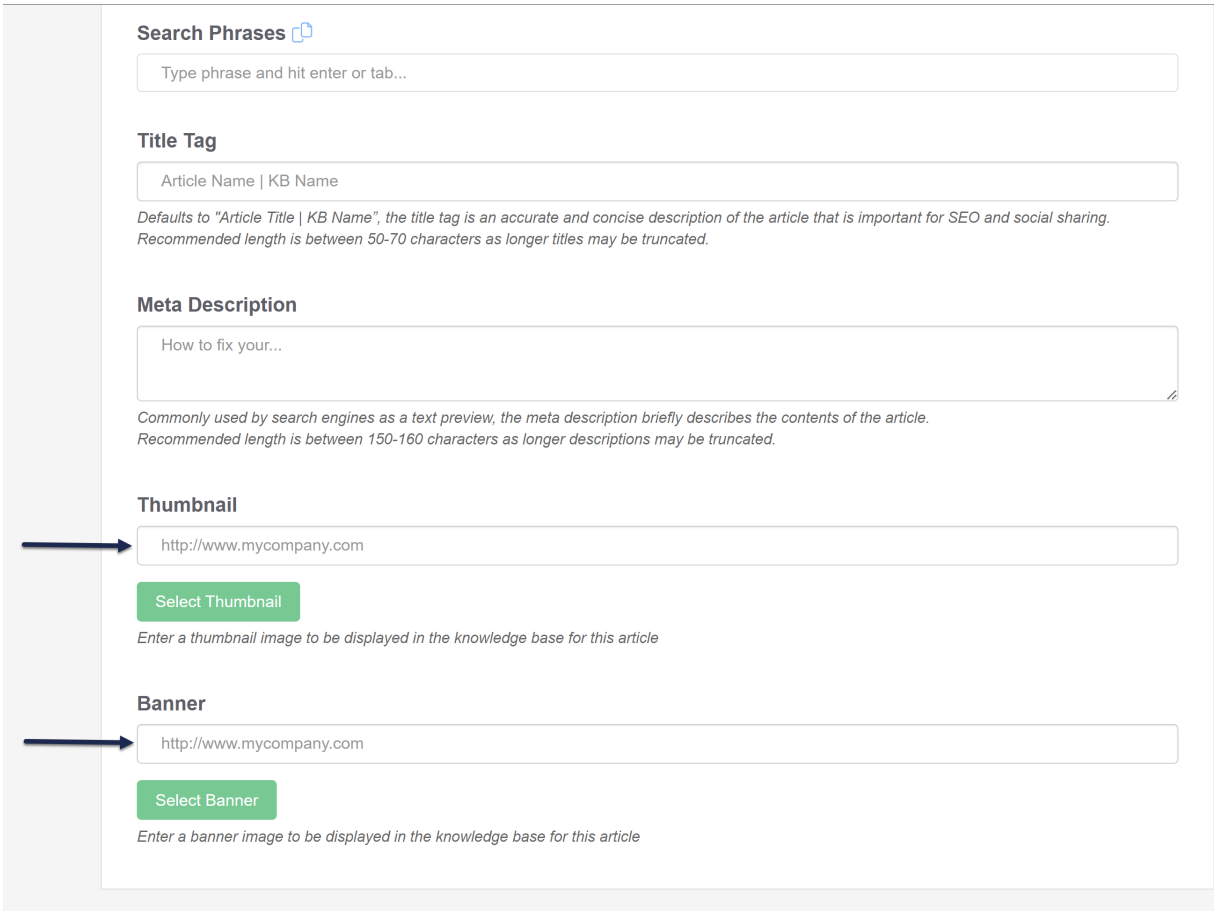
Add banners and thumbnails

Last Modified on 12/05/2024 12:37 pm EST

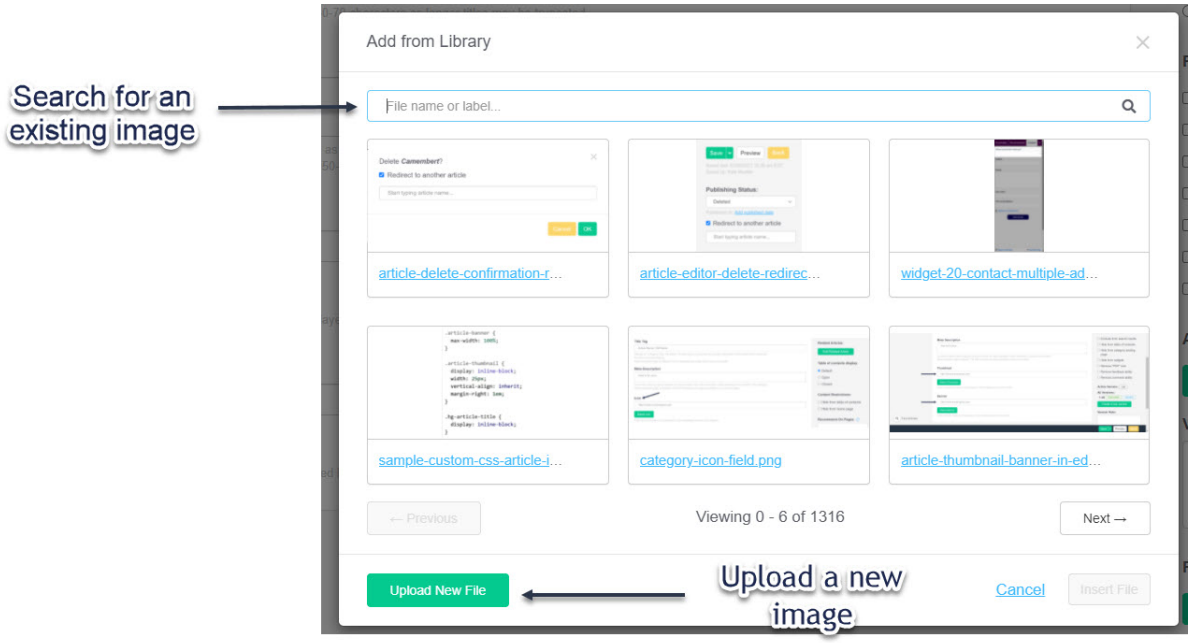
You can set images as banners or thumbnails for your articles.

To add a file for either field:

1. Click the appropriate **Select** button. This opens a pop-up.



2. In the pop up, search your existing image files in the File Library, or upload a new image file.



3. Once you've finished adding the files, be sure to **Save** your article.

Thumbnails and banners do not display automatically. You need to add them to your article template. Refer to Use thumbnails and banner images for more information.

URL redirect article

Last Modified on 05/29/2024 5:28 pm EDT

What if the content you'd like to include in your knowledge base isn't IN your knowledge base? Maybe you'd like to reference the page of another site, or a press packet your PR department has put together.

You can set up both categories and articles as URL redirects. For articles, this means you can administer the article as an article (restrict it to groups, restrict editing to teams, use the article call-outs, assign related articles) but when someone clicks on the title of the article or navigates to the URL, they'll be redirected to the URL you set up, instead.

URL redirects can be great when used with:

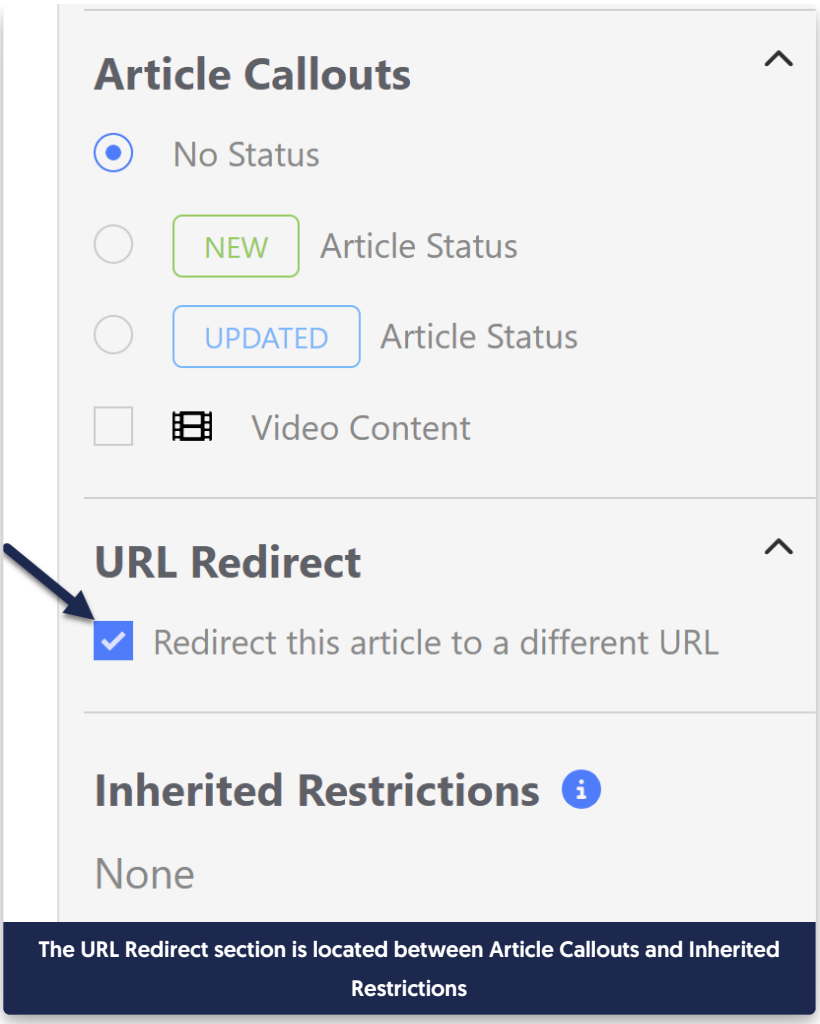
- Links to external sites/files you don't want or can't move into KnowledgeOwl
- Links to files stored within KnowledgeOwl, where you want the file to open directly (See the KnowledgeOwl W-9 for an example of this type!)



URL redirect articles will not display in the Popular Articles Report or the Published Articles with 0 Views report, since we do not currently track view data for this article type.

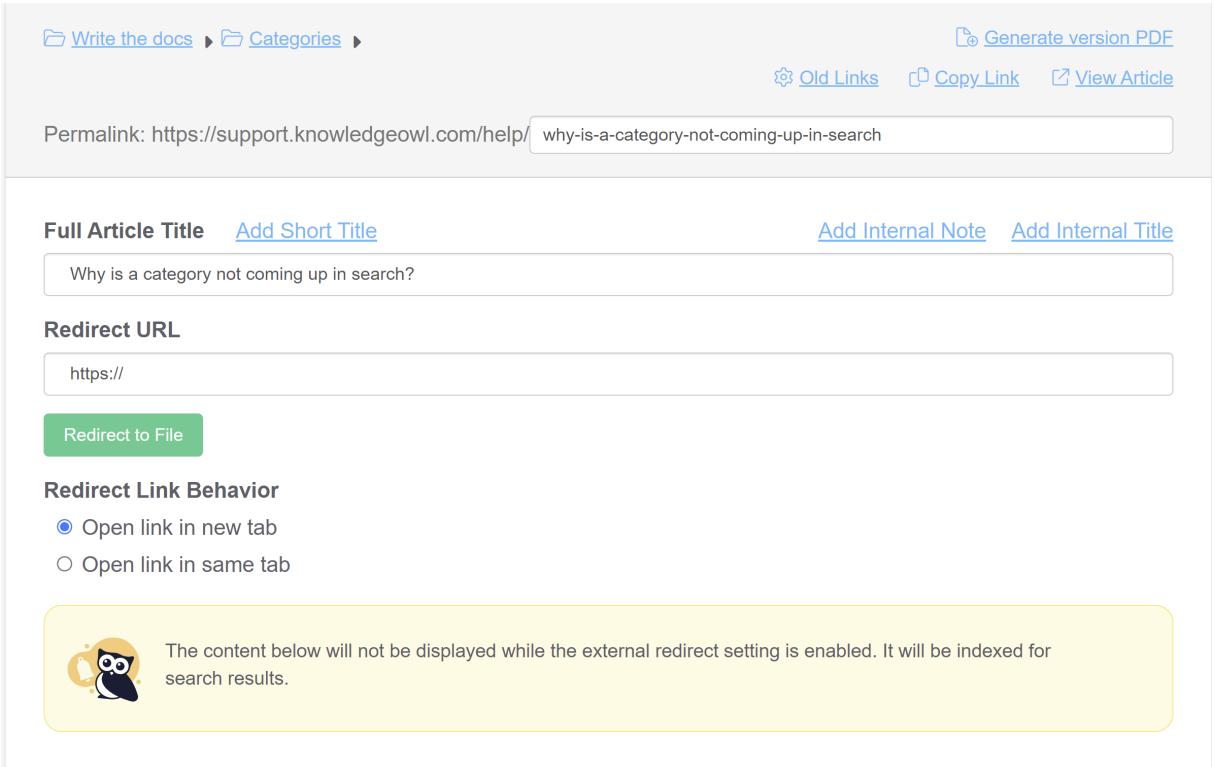
You can create a new article as a URL redirect or convert an existing article to be a URL redirect. To do so:

1. In the **URL Redirect** section of the righthand menu of the article editor, check the box next to **Redirect this article to a different URL.**



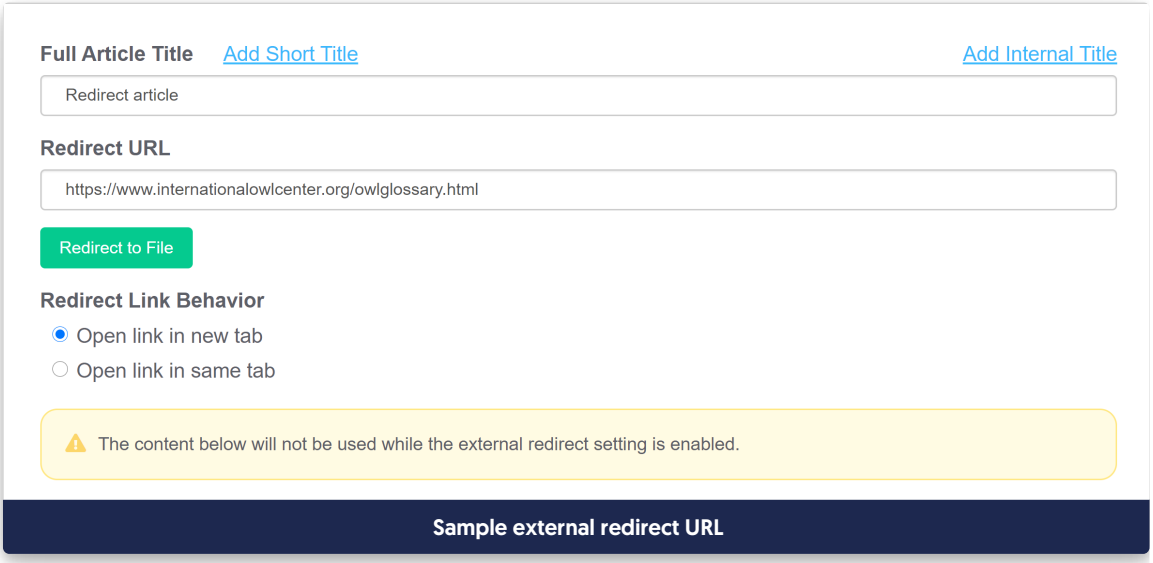
The URL Redirect section is located between Article Callouts and Inherited Restrictions

2. **Once checked, this will add a section between the full article title and the editor where you can add the URL you'd like to redirect to:**

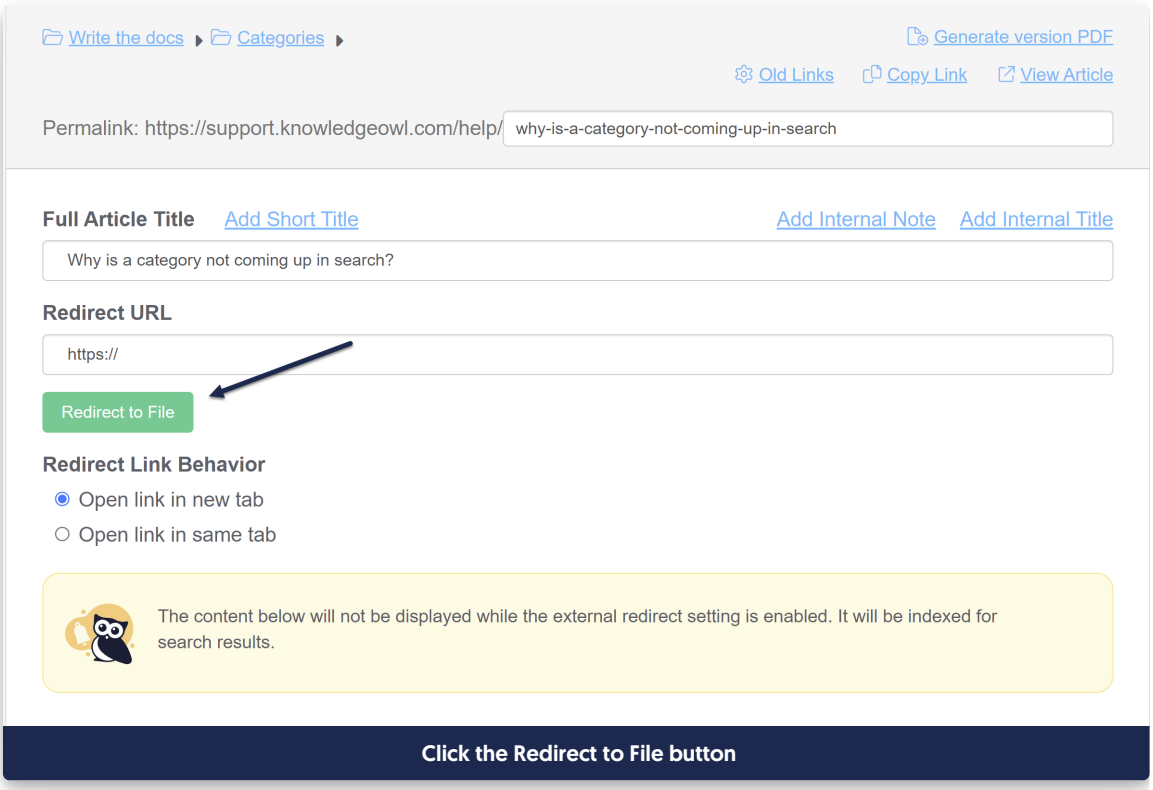


3. **Now, add the URL you'd like to redirect to.**

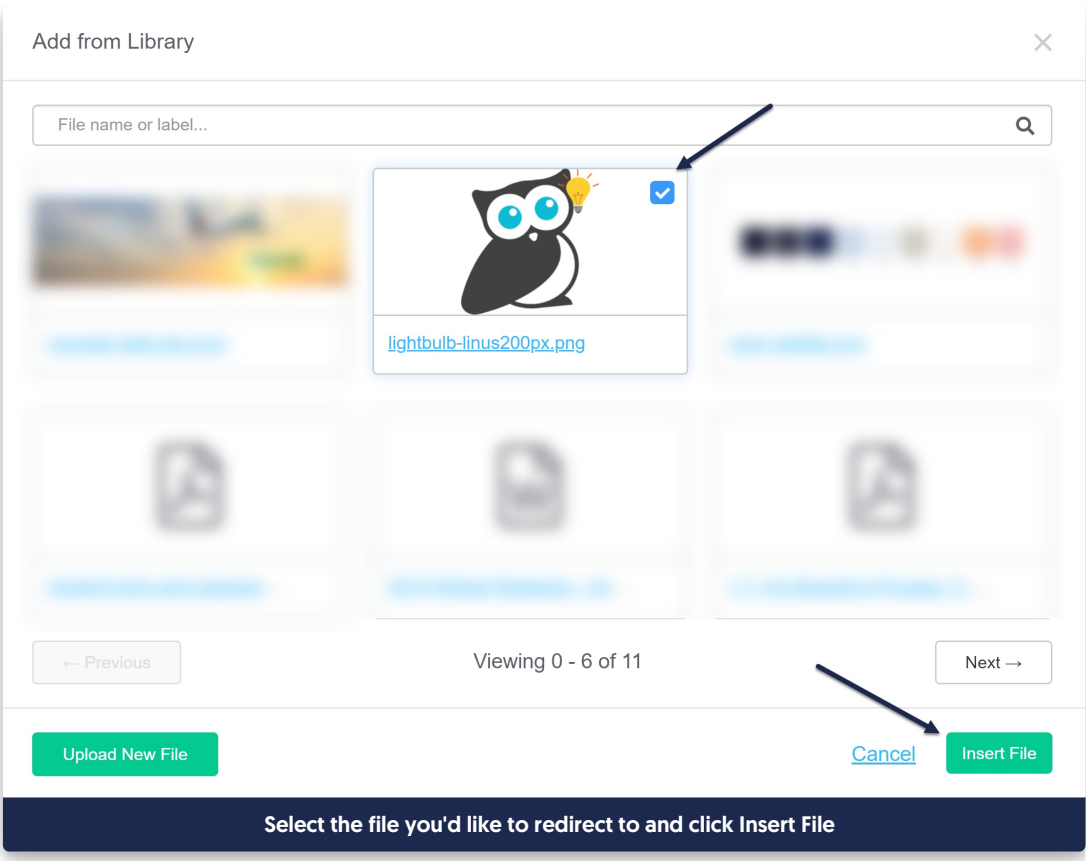
    a. **For external URLs, type or paste the URL you'd like to use into the Redirect URL field. Here, we're redirecting to the International Owl Center's Owl Glossary page:**



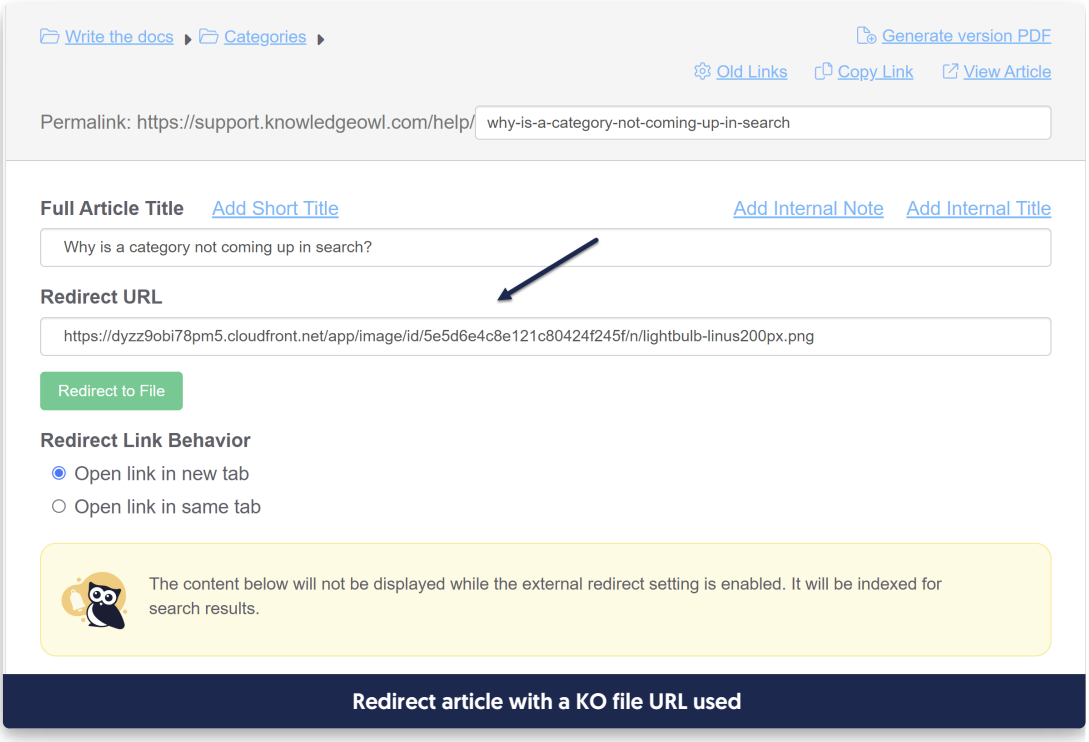
    b. **To redirect to a file uploaded to KnowledgeOwl (or to directly upload a file to KnowledgeOwl to redirect to), click the Redirect to File button:**



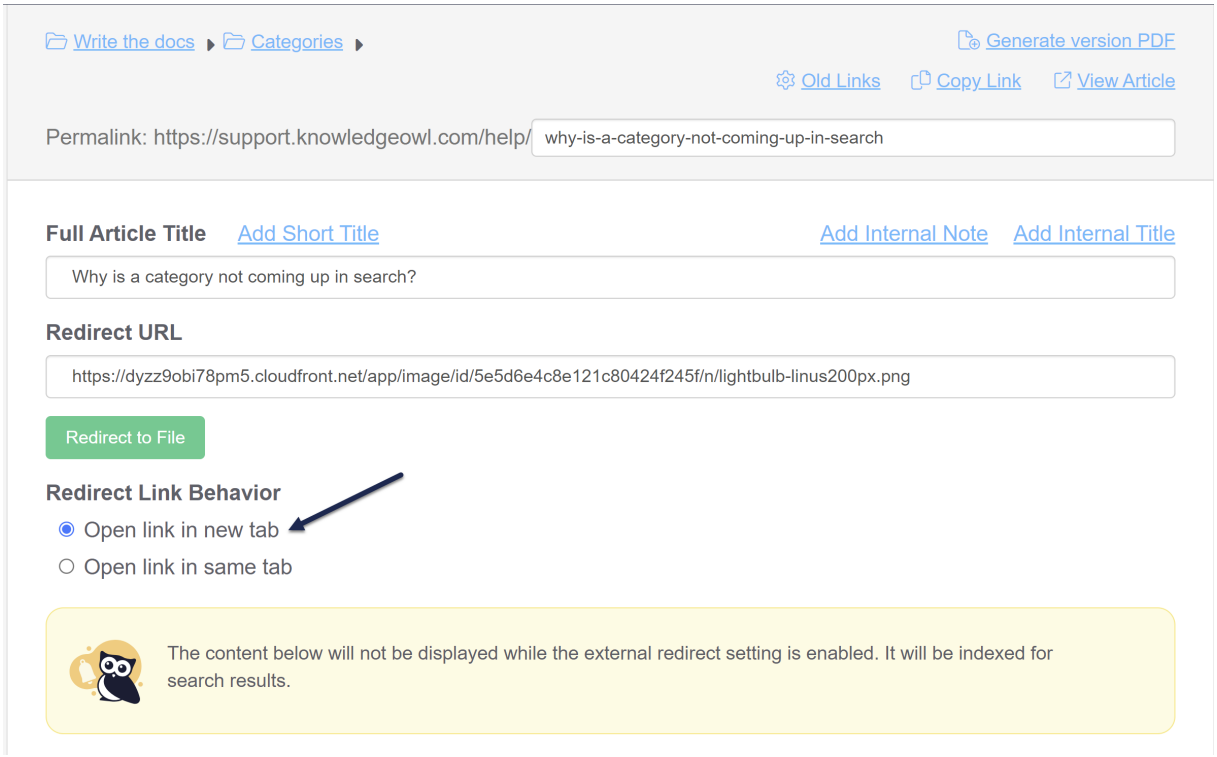
        i. **This will open an Add file from Library pop-up where you can select the file you'd like to insert. Browse or search for the file. (Or click Upload New File to add a new one.) Click on it to select it, then click the Insert File button in the lower right.**



ii. **The URL of the file will be added to the Redirect URL field:**



4. **Set whether you'd like the redirect link to open in a new tab or in the same tab. (Open link in new tab is used by default.)**



5. **Save** your article.

URL redirect articles do not work within topic display categories that use the Override Article Links setting. This is because the override gets applied before the URL redirect.

To switch an article from being a URL redirect to being a normal article, uncheck the "Redirect this article to a different URL" box. Once you save, the article will function normally and display whatever content is in the editor.

Anything included in the body of the article *will still be indexed for search* even though it won't be displayed. You can use this to your advantage to help provide additional words or terminology to help people find this article!

For example, if you're using a file stored within KnowledgeOwl, the content of that URL redirect file will not automatically be indexed for search. If you'd like it to be:

- **For PDFs, you can insert the PDF into the body of the article using the Upload File option. When you save the article, we'll scrape the contents of the PDF for search.**
- **For non-PDF files, you can open the file, copy text in it, and paste that into the article body. You don't have to worry about how weirdly it's formatted, since it's not displayed, but having the text here will help it get indexed for search!**

Editor keyboard shortcuts

Last Modified on 05/29/2024 5:28 pm EDT

Keyboard (or keystroke) shortcuts can make your content creation and editing go just a bit faster. You can see a lot of the shortcuts available in the Modern Editor by clicking the ? icon on the lower bar, but we have a few that aren't shown there. Here's a list of the keystroke shortcuts we find the most useful.

Text formatting shortcuts

Formatting	Windows shortcut	Mac shortcut
Paragraph	Ctrl + Alt + 0	Cmd + Option + 0
Header 1	Ctrl + Alt + 1	Cmd + Option + 1
Header 2	Ctrl + Alt + 2	Cmd + Option + 2
Header 3	Ctrl + Alt + 3	Cmd + Option + 3
Header 4	Ctrl + Alt + 4	Cmd + Option + 4
Header 5	Ctrl + Alt + 5	Cmd + Option + 5
Header 6	Ctrl + Alt + 6	Cmd + Option + 6
Preformatted text	Ctrl + Alt + 7	Cmd + Option + 7
Div	Ctrl + Alt + 8	Cmd + Option + 8
Blockquote	Ctrl + Alt + 9	Cmd + Option + 9
Bold	Ctrl + B	Cmd + B
Italics	Ctrl + I	Cmd + I
Underline	Ctrl + U	Cmd + U
Strikethrough	Ctrl + S	Cmd + S
Decrease Indent	Ctrl + [	Cmd + [
Increase Indent	Ctrl +]	Cmd +]

Action shortcuts

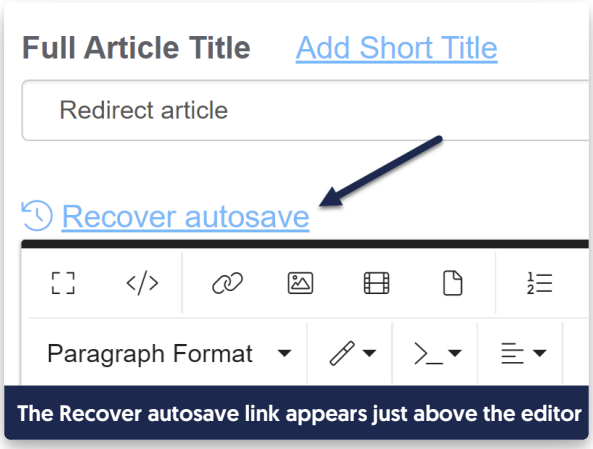
Action	Windows shortcut	Mac shortcut
Insert link	Ctrl + K	Cmd + K
Insert Image	Ctrl + P	Cmd + P
Ordered List	Ctrl + Shift + 7	Cmd + Shift + 7
Unordered/Bulleted List	Ctrl + Shift + 8	Cmd + Shift + 8
Undo	Ctrl + Z	Cmd + Z
Redo	Ctrl + Shift + Z	Redo

Autosave

Last Modified on 12/05/2024 12:38 pm EST

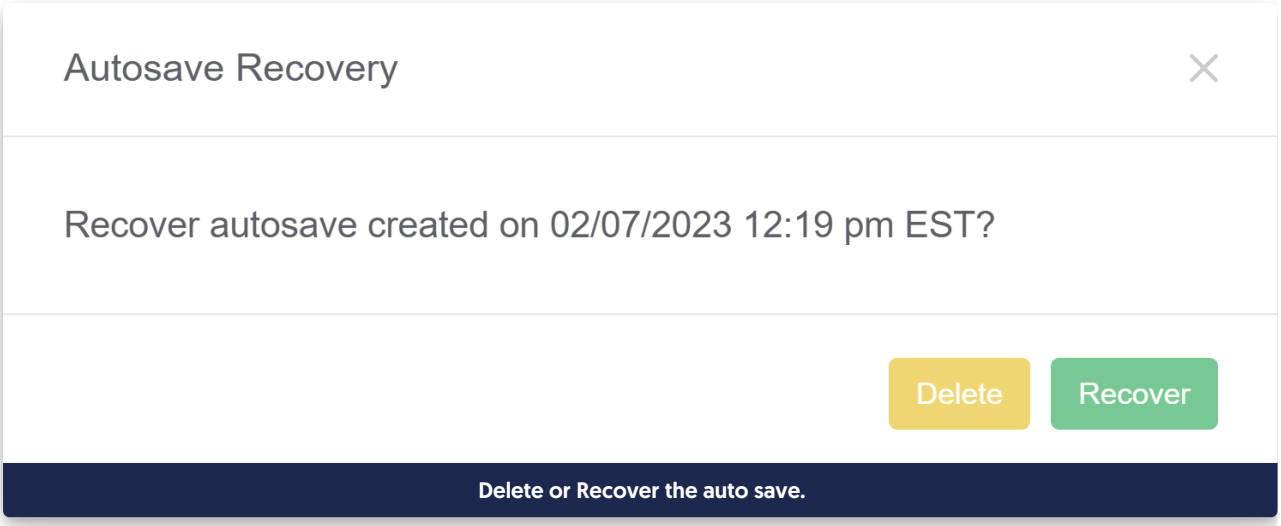
When you edit a category or article, autosave creates a backup every 30 seconds.

If you leave without saving your changes, autosave will let you know the next time you come back to the category or article. You'll see a Recover autosave link just above the editor:



The Recover autosave link appears just above the editor

Click this link to open a pop-up where you can choose whether to delete or recover that autosave:



Delete or Recover the auto save.

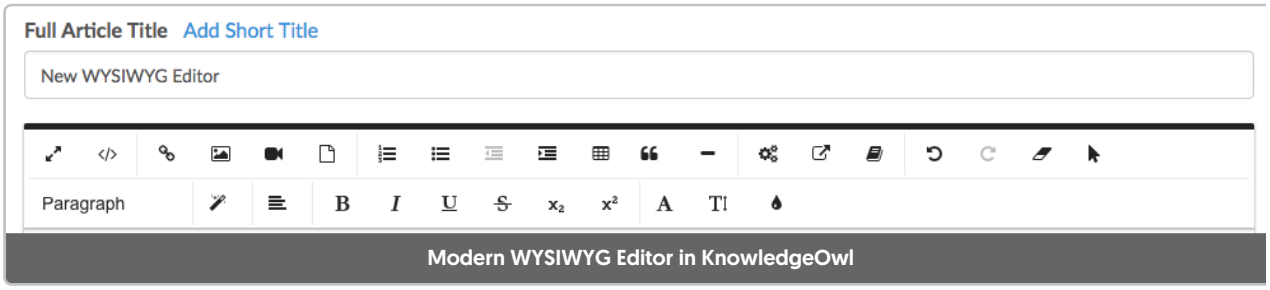
Once you've recovered the autosave, you'll still need to Save the article to permanently save those changes.

Modern WYSIWYG editor vs legacy editor

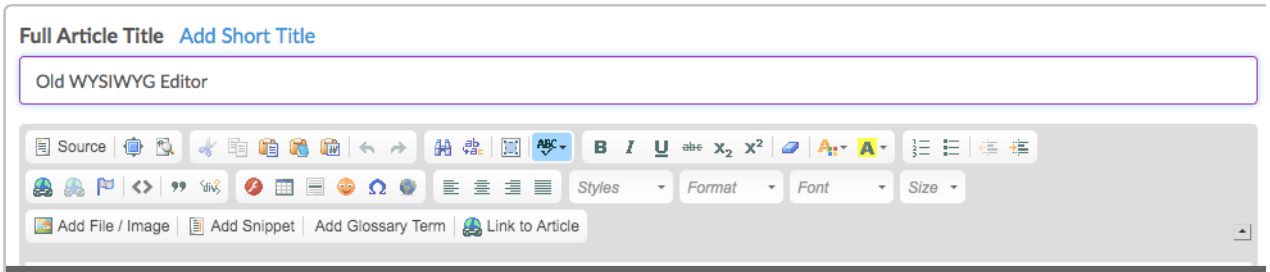
Last Modified on 12/05/2024 12:39 pm EST

Modern editor looking weird? Try a hard refresh: Shift+F5 on a PC and Command+R on a Mac.

The modern WYSIWYG editor is here to stay! If you aren't sure which editor you are using, here's a quick visual guide:



Modern WYSIWYG Editor in KnowledgeOwl



Legacy WYSIWYG Editor in KnowledgeOwl

Is the legacy editor going away?

Not anytime soon. We never want to make any change to negatively impact our customers, and we understand that many of your have grown accustomed to and work effectively in our legacy editor. What's more, the modern editor is not supported in older browsers like Internet Explorer 9, so if you are still using that, you will want to be using the legacy editor until you are able to upgrade to a newer browser.

Will you be upgrading the legacy editor?

We will not be making any enhancements to the legacy editor; all modern WYSIWYG features and functionality will be done solely in the modern editor, which is one of the main reasons we wanted to make the switch. We want to be able to add awesome new features and functionality to the editor based on your feedback, and the modern editor makes it much easier for us to do that. We will do our best to fix any bugs that arise in the legacy editor, but our focus will be on improving the modern editor moving forward.

What are the benefits of the modern editor?

There's lots to love. In additional to a slick, modern, and clear interface, there's also better support for...

- Images
  - Copy and paste
  - Add captions
  - Easily center

    - Choose between block (break text) or inline
    - Drag and drop responsive resize
    - Quick styles (rounded corners, circular, thumbnails, or responsive)
    - Quick alt text
- Video
    - Embed via third-party URL or embed code without going to Source
    - Upload to KO and embed in HTML5 video
- Copy and paste
    - Copy and paste images
    - Copy and paste text cleanly from Word or Google Docs
- Spacing
    - Enter/return now creates line breaks, making it easy to add manual spacing in your content
- Styles
    - Magic wands allows you to quickly add wells, alerts, leads, and blockquotes
    - Keyboard shortcuts for common tools (more info coming soon!)
- Tables
    - Responsive tables (percentage widths!)
    - Helpful styles such as condensed, striped, bordered, and highlight on hover

What's not working in the Modern editor?

- ~~**Windows 7 Internet Explorer 11** has some modern editor issues, including the articles not automatically scrolling or resizing and glossary items being added to the end of the articles rather than where you put them. Probably best to use another browser or stick with the legacy editor until we sort this out.~~
- ~~**Small screens** are not showing all the options in the WYSIWYG. If you are on a tablet, smaller laptop, or a phone, the editor probably is missing some thing right now.~~
- ~~**Anchors** are not currently available in the modern editor unless you want to venture into the HTML. Best use the legacy editor for that for now!~~
- ~~**Code blocks** are not currently available. While you can use the preformatted text block in the paragraph dropdown for code snippets, we do not currently have a code editor with language highlighting.~~
- There is currently no tool to add **iFrames**. Use the legacy editor for now unless you want to dive into the HTML.
- The link tool is missing an **Email** option to create mailtos. You can use the legacy editor or specify a email option by prepending "mailto:" to the email address in the URL field, like "mailto:support@knowledgeowl.com".
- ~~Lists currently do not have the ability to choose **list styles**; it's currently bullets or numbers. Use the legacy editor or HTML to specify different options.~~
- Some of the legacy **inline styles** are missing, including keyboard, typewriter, and computer code.
- We are missing a **div** tool to wrap content and specify a class name.
- ~~You cannot specify your own **hex colors** in the color picker.~~
- There's no **find and replace.**
- Some articles from the legacy editor, especially those with **complex tables**, don't convert well to the modern editor. If you switch to the modern editor and your articles look wrong, switch back before saving and let us know so we can help you get it converted.

SCAYT Spell Check

Last Modified on 05/29/2024 5:28 pm EDT

The SCAYT option is only for those using the Legacy editor. The Modern editor uses the built-in browser spell-check.

Spell check can be enabled by default under **Settings** > **Basic**. The spell checker tool in the editor is SCAYT, which stands for "spell check as you type".

The SCAYT feature allows you to specify a variety of options, including:

- Ignore All-Caps Words
- Ignore Domain Names
- Ignore Words with Mixed Case
- Ignore Words with Numbers

You can also choose from the following languages:

- American English (default)
- Brazilian Portuguese
- British English
- Canadian English
- Canadian French
- Danish
- Dutch
- Finnish
- French
- German
- Greek
- Italian
- Latin
- Norwegian
- Portuguese
- Spanish
- Swedish

It also allows for an author-generated dictionary that is stored in a browser cookie. Once too large for a cookie, you can store the dictionary in your library.

Most modern browsers have a built in spell checker, which is why the feature is off by default.

Sharing "draft" articles

Last Modified on 05/29/2024 5:28 pm EDT

Except in true lone writer setups, at some point, you're probably going to need to share a draft or in-progress article with other people to get input. These might be other KO editors and admins, but it might just as readily be a Subject Matter Expert (SME), someone in your support or marketing department, or a manager.

There are two ways to quickly share an in-progress article with others. The option you choose depends on two factors:

- Is the person you're sharing with able to log in to app.knowledgeowl.com and view the article in edit mode?
- Would you rather they review it in edit mode or view it as it will appear live to readers of the knowledge base?

For other KnowledgeOwl authors

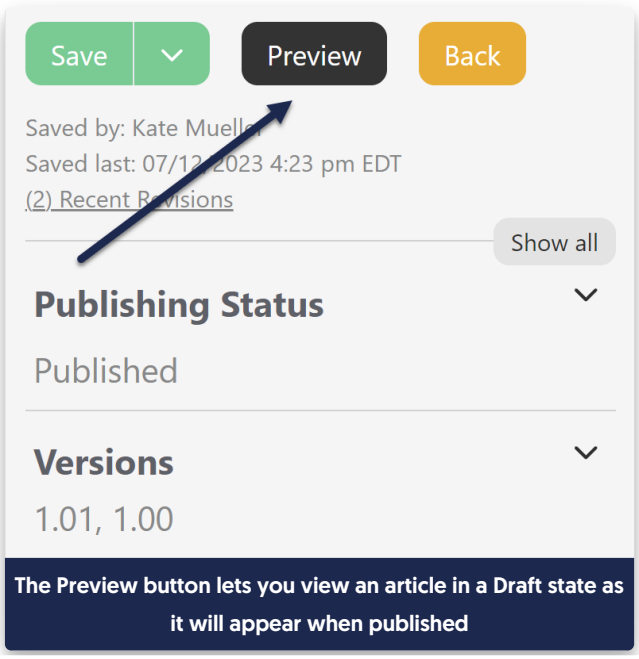
For other KnowledgeOwl authors (i.e. people who log in to app.knowledgeowl.com and can see the content in edit mode):

1. For the article you want reviewed, copy the app.knowledgeowl.com URL for that article. It will look something like:

   ```
   /55aaaaabbbbbbb55555577777
   ```

2. Share that link with the person you'd like to review the article.

3. Opening that link will take them directly to the article in edit mode; they could then click the **Preview** button in the upper right to view the article more or less how it will appear live.



Preview links are not persistent, so you can't copy the Preview link and share it with another author. Preview mode doesn't support all snippet logic, so if you're using a series of snippets, try the next option.

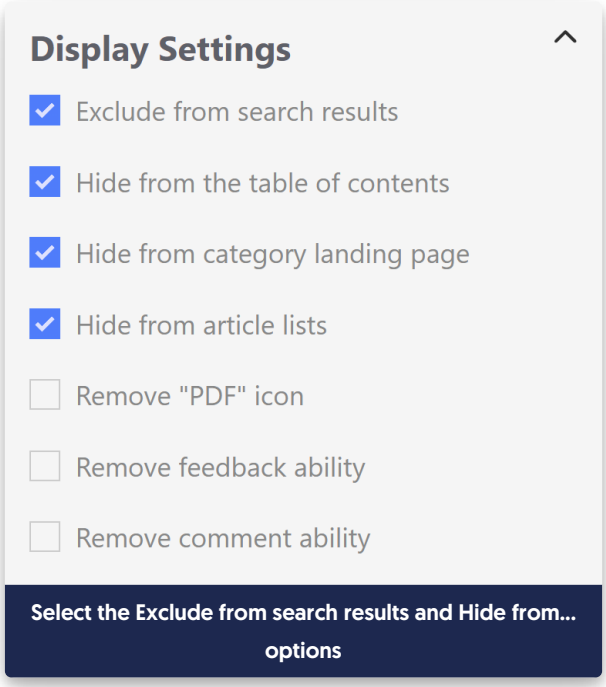
For reviewers without KnowledgeOwl author access

For reviewers who do not have author accounts at app.knowledgeowl.com, you'll need to share the article as it appears in the live knowledge base. We recommend hiding the article from search and navigation, publishing it, and sharing the direct URL to the article. The advantages to this approach:

- All reviewers see the article exactly as readers will
- You don't have to use additional author seats for people who aren't editing content
- This is basically like a hidden published article. It won't show up in the table of contents or search, and only people with the direct URL can view it.

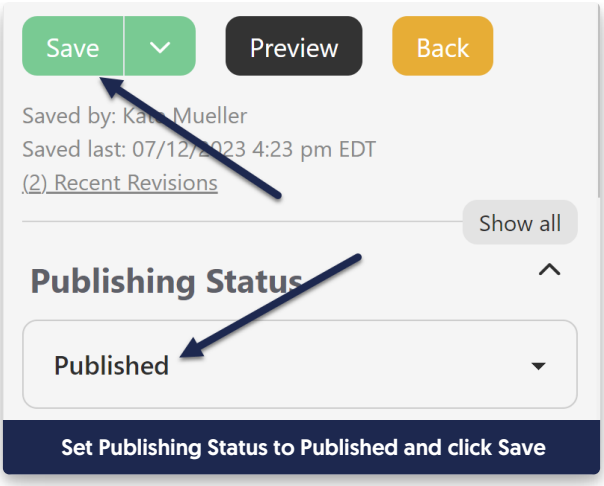
To share an article this way:

1. Open the article in edit mode.
2. Scroll to the **Display Settings** section and check the boxes next to **Exclude from search results, Hide from table of contents, Hide from category landing page**, and **Hide from widgets**. See Display Settings for more information on these options.



You can skip this step if you don't mind the article showing up in search, navigation, the table of contents, and the widgets, but most people don't like in-progress articles to show there!

3. Change the Publishing Status to **Published**.
4. Click the **Save** button.



5. Now your article is published, but hidden from search and navigation. Click the **View Article** link to the left of the Save button to view the article as it appears in your knowledge base.



6. This will open the article within the knowledge base in a separate tab. Copy the URL it opens to.

7. Share that URL with your reviewers.

8. Once your review is done, you can uncheck any of the **Display Settings** boxes you checked in Step 2 to make the article publicly visible, **Save**, and continue with your normal workflow.



Using versions? Versions have a "Make Visible to Groups" option so you can share an inactive version in the live knowledge base for review, too!

Share articles between categories and knowledge bases

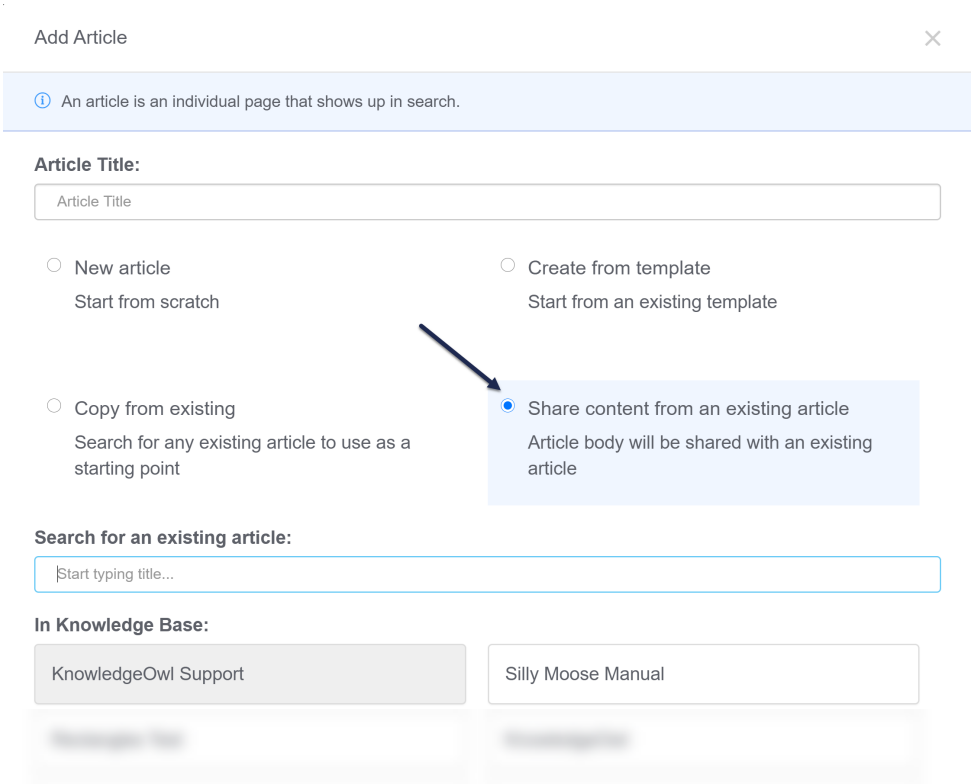
Last Modified on 05/29/2024 5:28 pm EDT

You can use a single article in multiple categories and across knowledge bases. The content (body) of the article as well as all versions stay in sync across all shared articles. Each article can have its own title, restrictions, and callouts. These are called shared content articles.

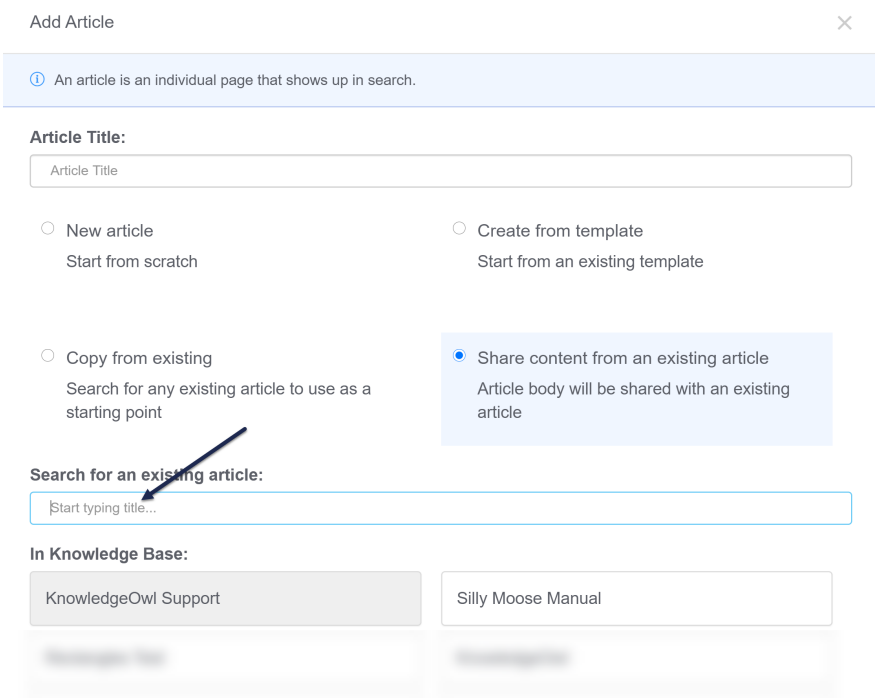
Updating the content of any of the articles updates the content of all of them.

To share an existing article in another category or knowledge base:

1. On the **Articles** page, navigate to the location where you wish to add the article.
2. Select **+ Add Article.**
3. Select **Share content from an existing article.**



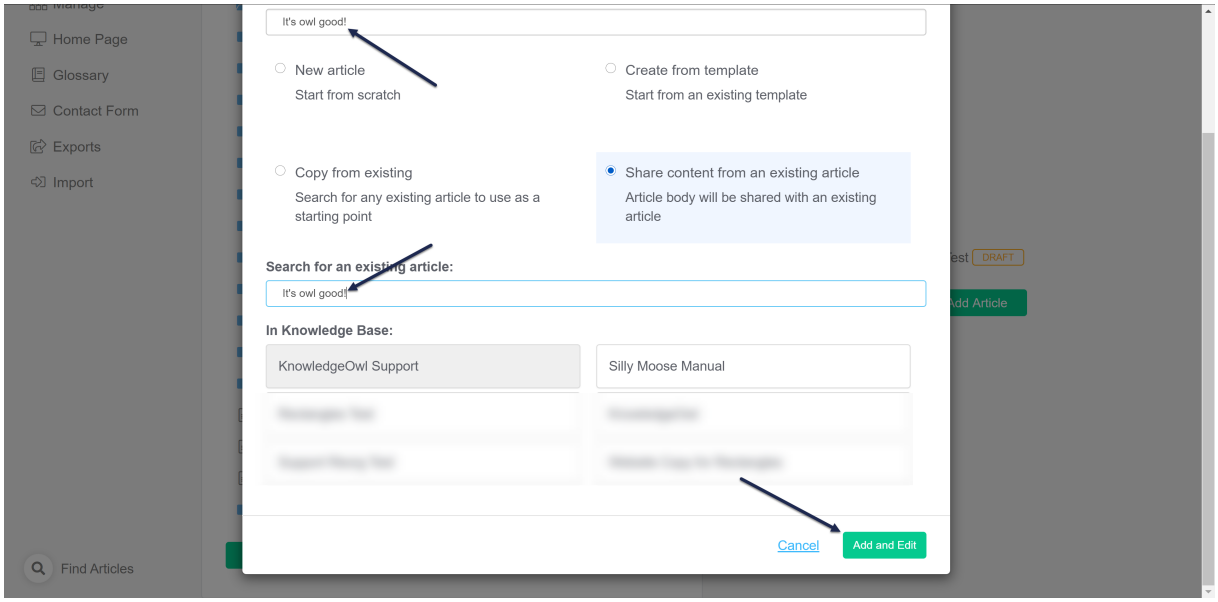
4. Additional options appear below. If you have multiple knowledge bases, the knowledge base you're currently in is selected, but you can select a different knowledge base's articles to search.
5. Next, in the **Search for existing article** field, start typing part of the article's name. This is an exact match search, and the dropdown will offer you articles that match your search.



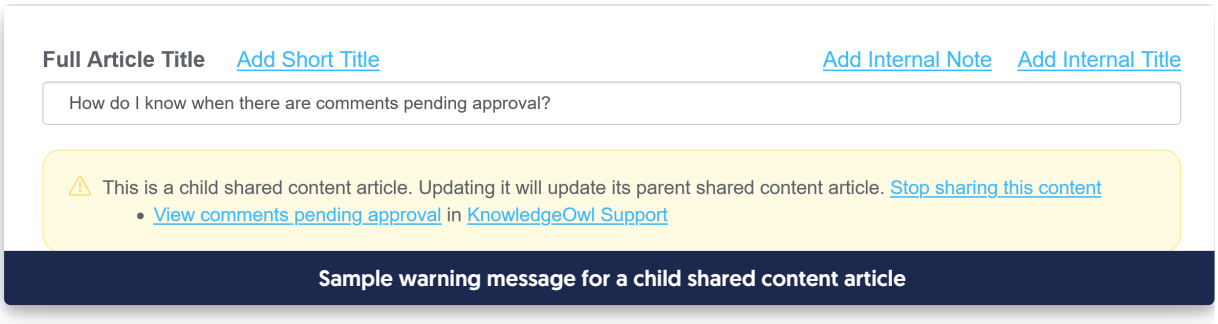
6. **Once the article you wish to share content with appears, select it.**

7. **This will copy the Article Title field at the top, based on the shared content article's title. You can change this if you wish.**

8. **Once you're done selecting the article and editing the title (if needed), click the Add and Edit button in the lower right to complete the content sharing.**



9. **This will open the new, shared content article. It will have all the content of the article you selected when you created it. It will open in Draft mode and will have a banner reminding you that this content is linked to an article in another location. Use the links in this banner to quickly navigate to the synced content article or the knowledge base where this is located.**



Sample warning message for a child shared content article

10. **You are now free to make any other changes as necessary to the article. Remember that any changes to the article body will be updated in all shared content articles.**

For information on what gets shared and how, see Shared content articles.

Topic articles (Reuse an article within another article)

Last Modified on 05/29/2024 5:28 pm EDT

You can set an internal reuse flag to mark any article in your knowledge base as a Topic Article.

Topic articles appear in search and the table of contents like any other article. But they can also be embedded within other articles. This will embed the body of the topic article without the title. This is great for content that needs to be displayed as a set of preliminary or introductory steps, hidden from certain groups, and so on.

There are a few tricks to using topic articles:

- When a topic article is embedded within another article and a reader searches for text within the topic article, search results will only list the topic article, not the article(s) it's embedded in.
- Automatic highlighting of glossary terms won't work in embedded topic articles; use manually inserted glossary definitions instead
- Topic articles embedded within *other* topic articles will not display wherever that additional topic article is embedded. So, for example:
  - Topic Article A contains information on your pricing structure
  - Topic Article B contains information on your subscription plans and discounts. Topic Article A is embedded in Topic Article B. Content should load properly.
  - Topic Article B is then embedded in Topic Article C. Topic Article B's own content will load properly, but the content of Topic Article A won't show here.
  - If you need to do something like this, you could consider using a snippet in place of one of these topic articles.
- Also of note: if you use versions in your topic article, you cannot mark these as ready for review and see them within the article where the topic article has been embedded--you can only review them within the topic article itself.
- If you are using reader group restrictions on your topic articles: in your live knowledge base, the topic article will only be visible to readers who belong to the reader group(s).
- **Topic articles + pdfs**: Topic articles get a somewhat special treatment when they are embedded in other articles and that other content is downloaded to PDF. Since the PDF generator is reader-agnostic, we use this logic:
  - If the topic article **has no** reader group restrictions, it will be included in all PDF downloads.
  - If the topic article **has** reader group restrictions, it will only be included in a PDF download if that content has a matching reader group that is assigned in the **Restrict to Groups** or **Add More Restrictions** section. (It cannot depend only on an Inherited Restriction.)
    - In all cases, for reader groups to work properly, the topic article must have the reader groups added using the **Restrict to Groups** checkboxes (if it has no inherited restrictions) OR if it has inherited restrictions, the group is also checked in the **Add More Restrictions** section.
    - If the article where it's embedded has no inherited reader group restrictions, but has **Restrict to Groups** boxes checked, those checkboxes must match what's used in the topic article.
    - If the article where it's embedded has inherited reader group restrictions only, the topic article won't be displayed unless you explicitly add the reader group in the **Add More Restrictions** section of the article.

- For PDFs where the topic article is not displayed, the text of the topic article will be completely omitted, as when you view the article in the live knowledge base without belonging to the appropriate reader group.
    - For example: let's say I have a topic article that is restricted to my Support reader group, and I have embedded it in several articles. Here's what I can expect in the PDF download of those articles:

Article title	Reader group restrictions	Article PDF result
How to Fly	None	Topic article not displayed
Dare to be Birds	Restricted to Customer reader group in **Restrict to Groups**	Topic article not displayed
It's Owl Good	Restricted to Support reader group in **Restrict to Groups** (matches my topic article)	Topic article displayed
Welcome Owlboard	Inherited restriction to Support reader group	Topic article not displayed
Lions and Tigers and Owls	Inherited restriction to Support reader group and restricted to Support reader group in **Add More Restrictions** (matches my topic article)	Topic article displayed

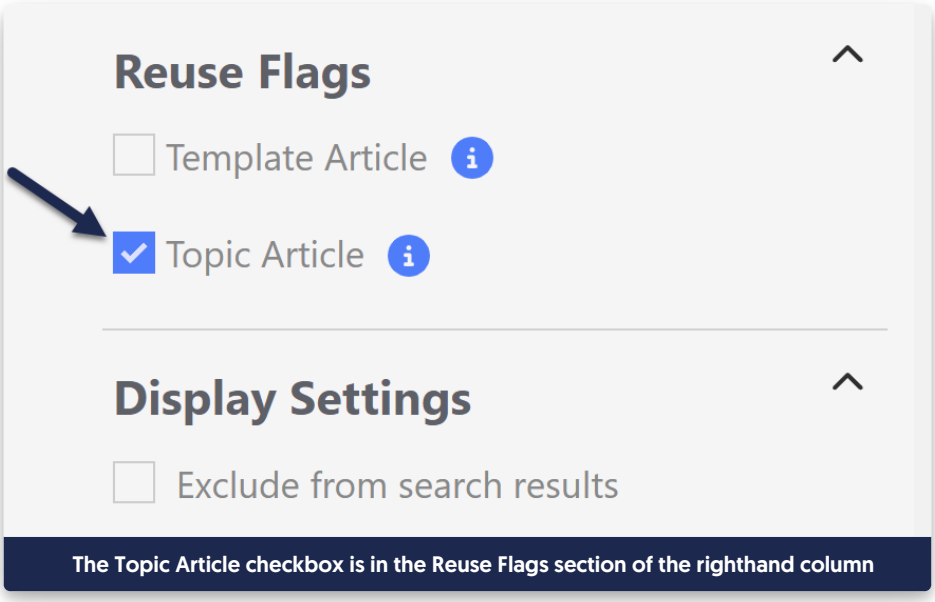
As you can see from this information: if the article that you're embedding your topic article within only has inherited reader group restrictions, you have to also explicitly assign those same reader groups to the article in order for the topic article to show up in the article PDF.



If you're looking for a solution that's not searchable on its own, but is still a reusable element, consider using snippets instead!

Create a topic article

You can make any article into a topic article by checking the Reuse Flags box for **Topic Article** in the article editor. Be sure to click **Save** to save your changes.



The Topic Article checkbox is in the Reuse Flags section of the righthand column

Insert a topic article into another article

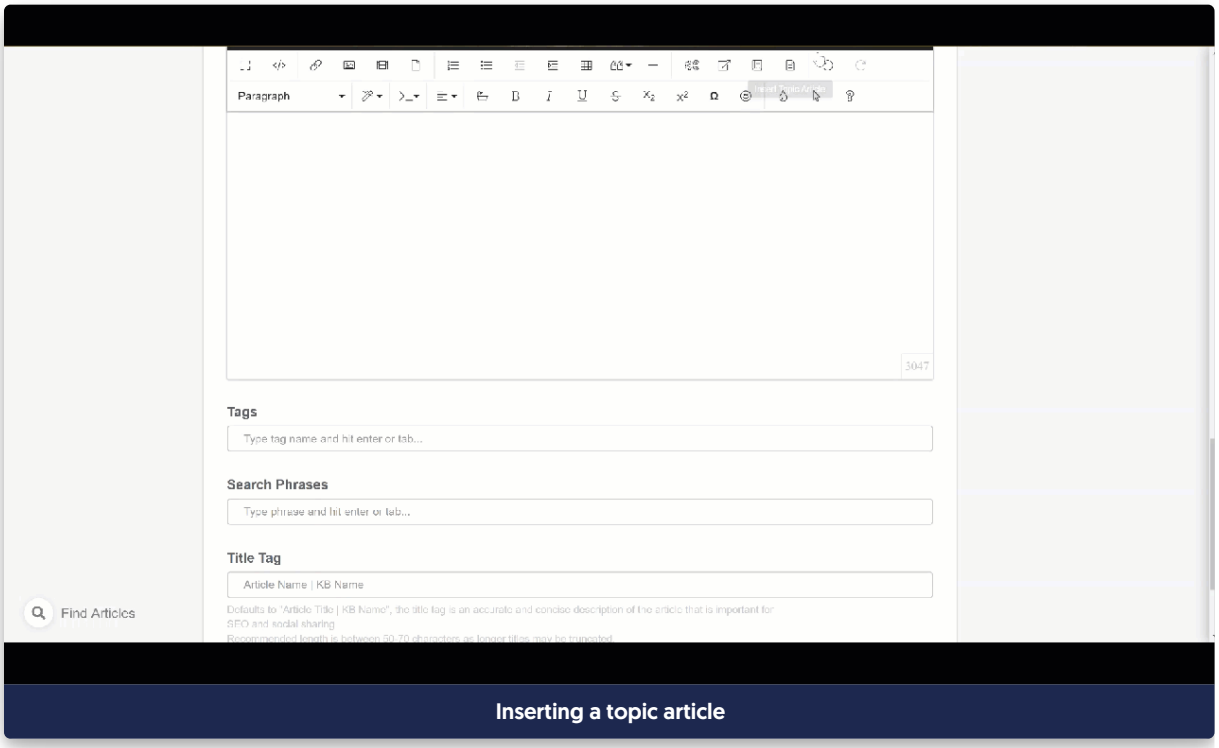
Once you have one or more topic articles created, you can insert them in other articles.

1. In the article you want to display the topic article in, click the **Insert Topic Article** icon in the editor:



2. This will open a pop-up where you can search for articles that have been flagged as topic articles.

3. Type in the name of the topic article you want to insert. The search will autosuggest as you type. Once you find the topic article you want to insert, click on it and click the **Insert Topic Article** button.



Inserting a topic article

4. You'll see a [[kb-topic:xxxxx]] inserted.

5. Click **Save** to save your changes.

The body of your topic article will now display within the main article.

Use cases

There are three main use cases for topic articles.

Reused text

As Linus works on his documentation, he has an article that details a series of steps all of his support agents have to go through every time they access customer information. This set of steps appears at the start of roughly half of his documentation. Rather than copy and paste these steps into every other document or link out to those steps, he can set the login steps article as a Topic article. Then he can insert this topic article into each of the documents where those are preliminary steps.

There are two advantages to this: it saves him time (inserting a topic article takes only a couple seconds) and it

keeps the steps more consistent. If the steps change, he only needs to edit the topic article and all the related articles will display those new, updated steps.

Customer-facing documentation with internal-only text

One of the knowledge bases Linus works on is a customer-facing product support knowledge base. But Linus also has a team of customer support agents who reference these documents. He wants to be able to include support-specific steps in those customer-facing documents, without having to create copies or a separate knowledge base.

Topic articles, like all articles, can be shown or hidden based on the Restrict to Groups settings. Linus can create the support-specific steps as a topic article. When he inserts that topic article into his customer-facing documentation, he can put it in the section of the customer documentation it's most relevant for. Customers won't be able to see it, but his support agents *will* be able to see it.

Video or file libraries

Linus has a knowledge base where each video is its own article, in different categories. But he wants to be able to display a collection of his videos in one place, as a kind of video library. He can set each video article to be a topic article, and then he can create a single longer article and insert each of his video library topic articles into it.

This allows each of his videos to be searchable and navigable independently, but also makes it easy for him to have a consolidated library of all of his resources.

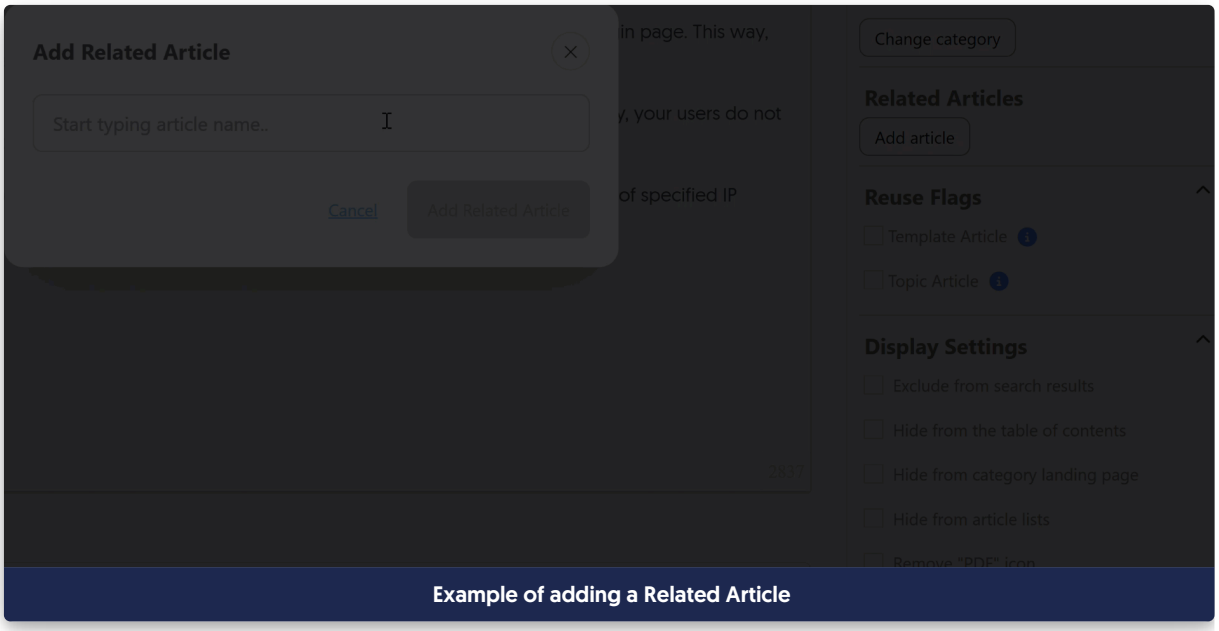
Related articles section

Last Modified on 05/29/2024 5:27 pm EDT

While you can use automatic suggestions for your related articles, for the best control, you'll want to manually suggest them.

To add a related article:

1. Open the article or category for editing.
2. In the **Related Articles** section, select **Add article**.
3. Type the article or category title you want to add as a related article. The dropdown autosuggests articles or categories based on what you've typed.
4. Select the article or category, then select **Add Related Article**.



Example of adding a Related Article

5. Be sure to **Save** the article.

See the Related Articles guide for more information on this feature.

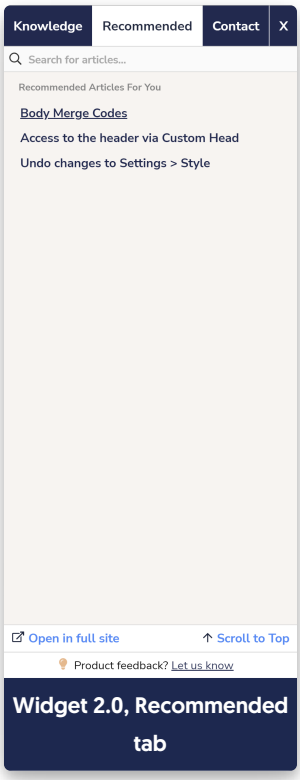
Use Widget 2.0 for Contextual Help: Recommend on Pages

Last Modified on 05/29/2024 5:28 pm EDT

Recommend On Pages allows you to provide contextual help to your readers through the embeddable Contextual Help Widget (2.0) or the API. You can provide a list of relevant articles based on the page the person opened the widget from, which may eliminate the need for them to search the knowledge base or contact you.

You can relate individual articles to pages in your knowledge base, website, or application so that they are suggested when the widget loads on the page, or you use the API to return articles for a particular page in your site. For example, if you associate articles with the "/pricing" page on your website, these articles appear when the contextual help widget is opened on that page. Alternatively, if you associate articles with the "/account" page in your application and use the API to pull articles for that page, these articles will be returned for your "/account" page.

In Widget 2.0, the Recommend on Pages will update the Recommended tab list:



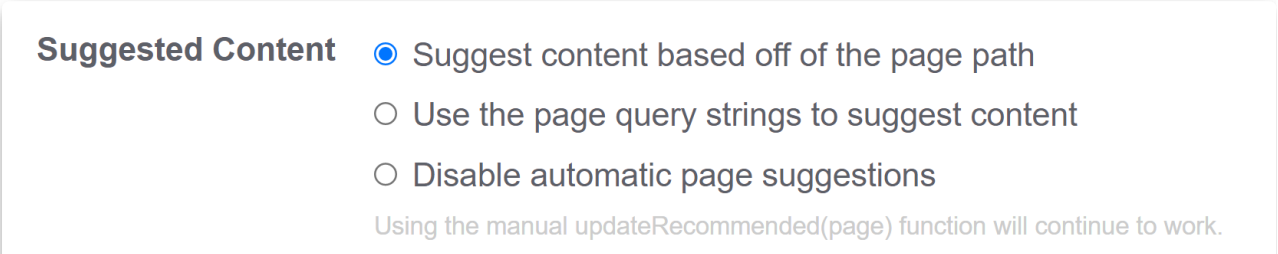
Widget 2.0, Recommended tab

In order to start using this feature, you'll need to:

- Set the Widget Settings to use the appropriate **Suggested Content** setting
- Add URLs from your main application or website to the articles or categories you'd like to recommend in the widget or API

Configuration - Widget settings

First, in **Settings > Widget**, check your widget's Admin Settings and be sure that the **Suggested Content** option best matches how your website or application is set up. This is usually a one-time set-up.



The Suggested Content options in the**Admin Settings** section

Formatting your page paths

Always use relative URLs. If we are configuring articles for https://www.knowledgeowl.com, take the portion of the URL that comes *after* that URL. For example, https://www.knowledgeowl.com/pricing becomes "/pricing". Specifically, the pathname of the URL is sent. The fragment and query string are not sent (unless you've selected the option to use query strings! Then you'd want to use query strings here.)

If your website or application includes URLs that have a variable ID field in them, you can replace that ID with {id} in your URL.

{id} only works with numeric and 24-digit hexadecimal IDs. For IDs that don't match either of those patterns, you would need to use the {custom} option via regex in **Settings > Widget** and configure custom regex rules appropriately.

You may also need to use some custom regex to handle ID values in your URLs; see the **Regex Replace URLs** section in Widget Admin Settings for more details.

Once you have the relative URL for pages you want to specify recommended articles or categories for, you can get started.

If you are using a single page application or the URLs in your website/app don't fit well within this framework, you can call a function to send a path of your choice to the widget. See Using Widget 2.0 on Single Page Applications for more information.

The interface is a little different depending on whether you're adding articles or categories, so let's look at each in turn:

Recommending Articles

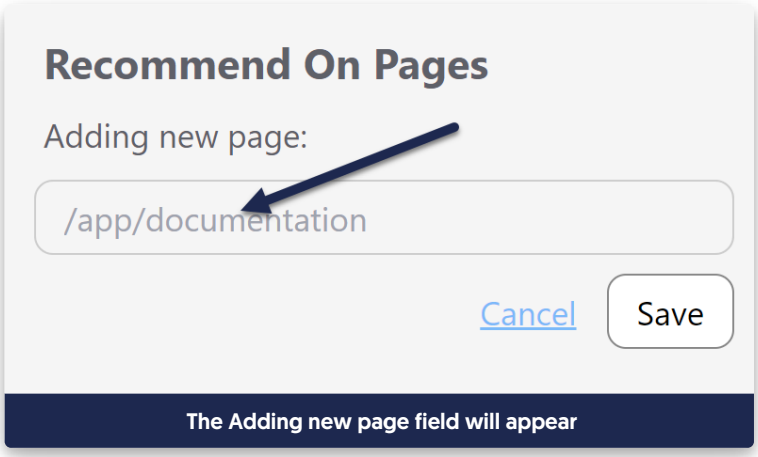
To set up an article as being recommended:

1. Open the article for editing.
2. Find the **Recommend on Pages** section in the righthand column.
3. Select **Add page** to begin adding a new page.



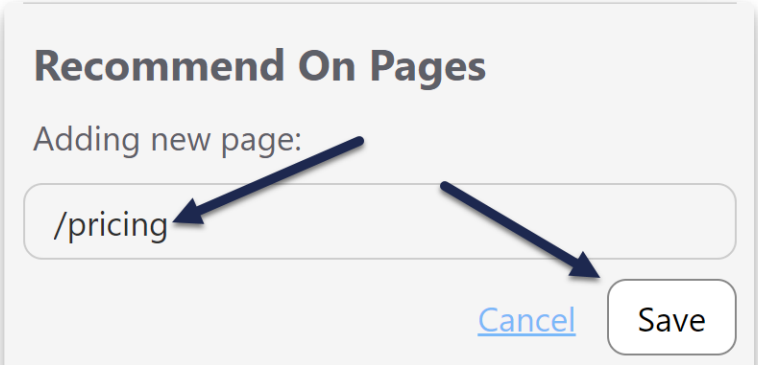
Click the Add page button to begin adding a new page path to recommend this article on

4. This will open an "Adding new page" section. Add your page path into the text field with the /app/documentation placeholder:



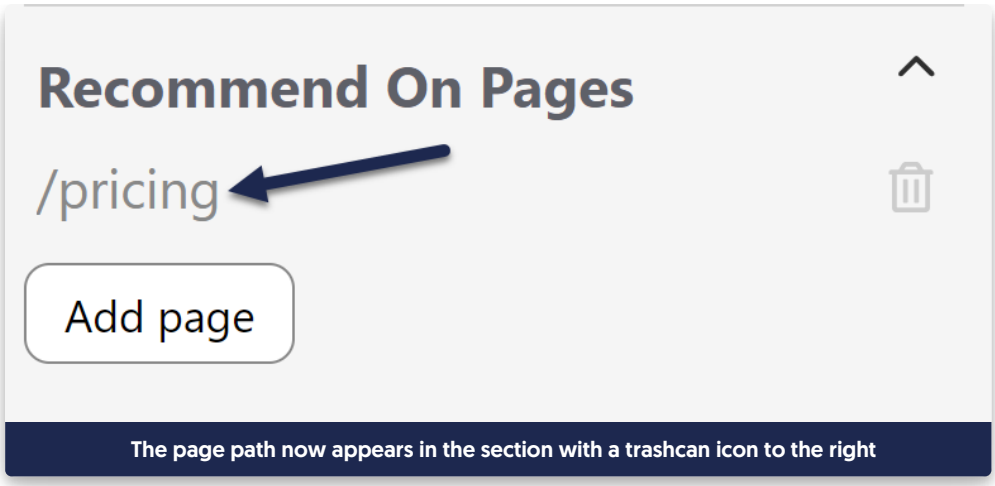
The Adding new page field will appear

5. Once you've finished adding your page path, click the **Save** button directly under it.



Add your page path into the text box and click the **Save** button directly under it

6. The interface will update to show the page path you added:



The page path now appears in the section with a trashcan icon to the right

7. Repeat this process for any other pages you want to recommend this article on.
8. Be sure to **Save** your article once you're done adding paths.

Update an existing recommended article path

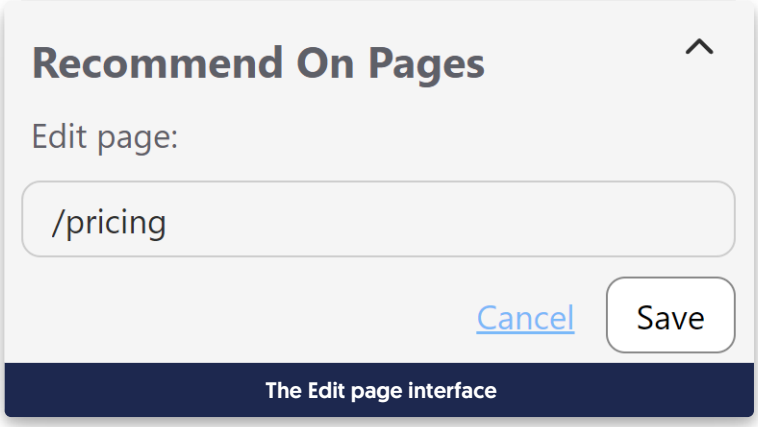
To update an existing **Recommend On Pages** path:

1. Open the article for editing.
2. In the **Recommend On Pages** section, click on the text of the path you want to edit. Here, we'll edit our /pricing page path:



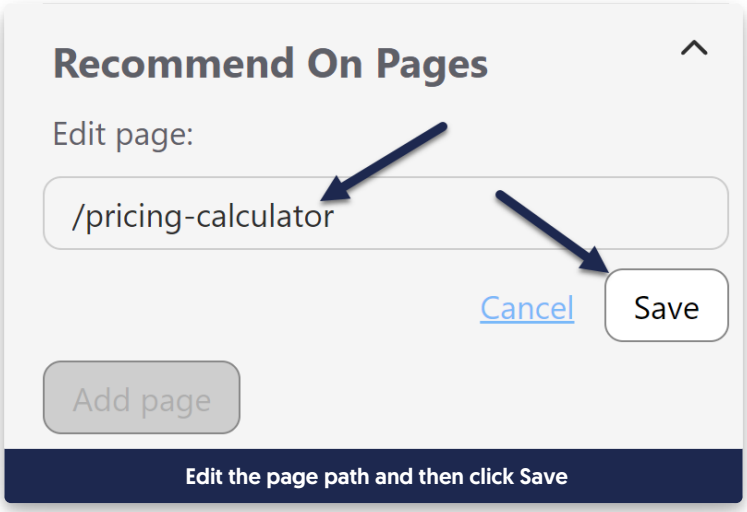
Click the path text to open edit mode

3. Once you click on the path, the interface adjusts to say "Edit page". You can now edit the path in the text box.



The Edit page interface

4. Once you've finished making your edits, click the **Save** button directly under the page path:

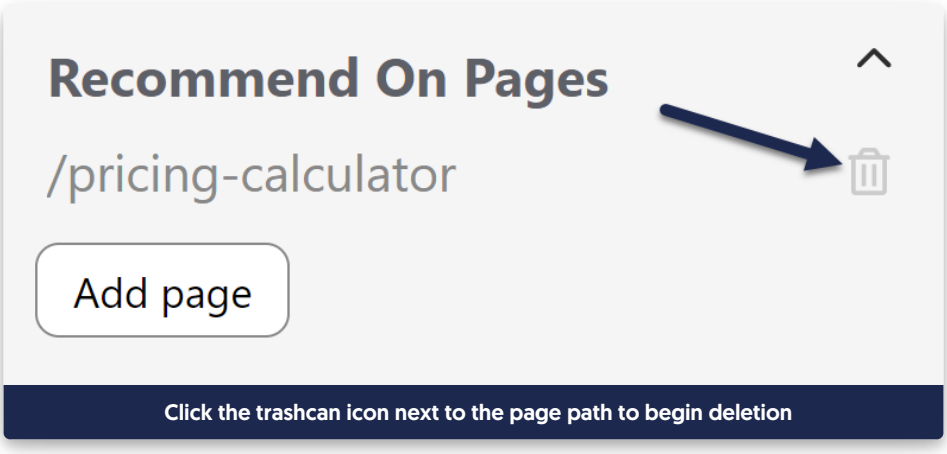


5. Be sure to **Save** your article once you're done making your edits!

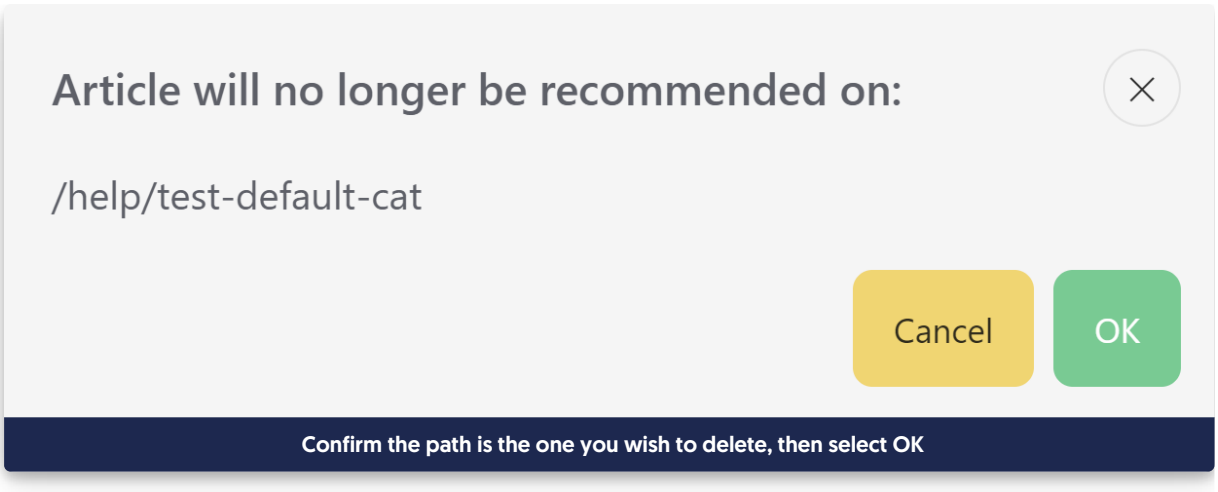
Delete an existing recommended article path

To remove a page path you no longer want to recommend this article on:

1. Open the article for editing.
2. In the **Recommend On Pages** section, click the trashcan icon to the right of the page path you want to remove:



3. In the confirmation message that appears, confirm that the page path is the one you meant to delete.
4. If it's the correct page path, click **OK** to complete the deletion.

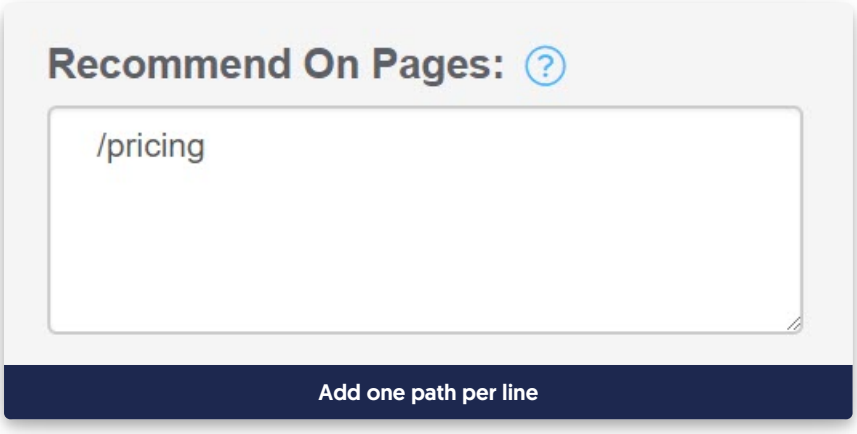


5. The interface updates to remove the path.
6. Once you're done making changes, be sure to **Save** your article!

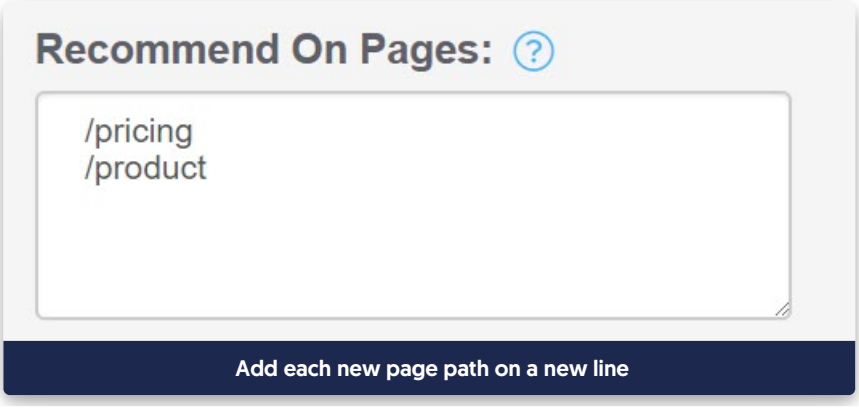
Recommending Categories

To set up a category as being recommended:

1. Open the category for editing.
2. Find the **Recommend on Pages** section in the righthand column.
3. Add the relative URL to the **Recommend On Pages** section, then select **Save.**



4. If you want this article to be recommended on multiple pages in your application or website, add each relative URL on a separate line:



5. Be sure to **Save** the article. The next time someone opens the widget from one of those pages in your site or application, it will suggest this category.

Update an existing recommended category path

To update an existing **Recommend On Pages** path in a category:

1. Open the category for editing.
2. Find the **Recommend on Pages** section in the righthand column.
3. Click in the text box there and edit the page path you want to adjust.
4. Be sure to keep each page path on its own line in the box.
5. Once you're done making edits, be sure to **Save** the article.

Delete an existing recommended category path

To remove a page path you no longer want to recommend this category on:

1. Open the category for editing.
2. Find the **Recommend on Pages** section in the righthand column.
3. Click in the text box there and delete the page path you want to adjust.
4. Be sure the remaining page paths are all on their own lines in the box.
5. Once you're done making edits, be sure to **Save** the category.

Ordering recommended articles

If you've added several recommended articles and you'd like to set the order they display in, you can change the order in by editing the article weights for that page in **Widget > Reporting**. See Recommended Article Weights for more information.

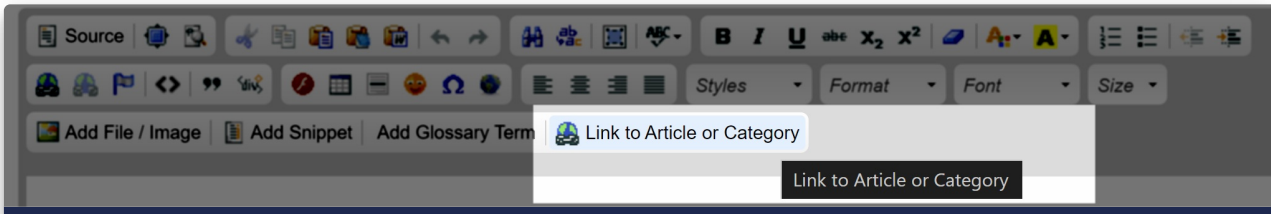
Link to article or category

Last Modified on 05/29/2024 5:28 pm EDT

The link to article or category feature is helpful when referencing another article or category within KnowledgeOwl. It dynamically creates the links based on the unique ID of the articles, so you never have to worry about changed permalinks breaking links in your knowledge base.



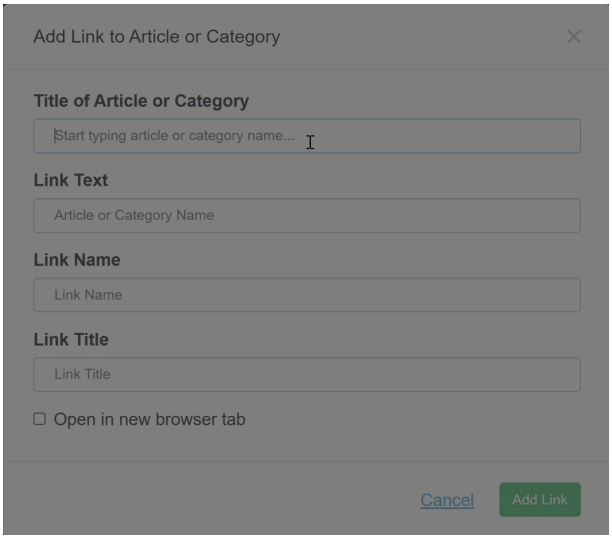
Modern Editor



Legacy Editor

To create a link to another article:

1. Select **Insert Link to Article or Category** (or **Link to Article or Category** in the Legacy editor).
2. This will open the **Add Link to Article or Category** pop-up. Start typing in the article or category title you'd like to link to in the **Title of Article or Category** field. Articles and categories matching what you've typed in will appear below. Click on the article you'd like to link to.

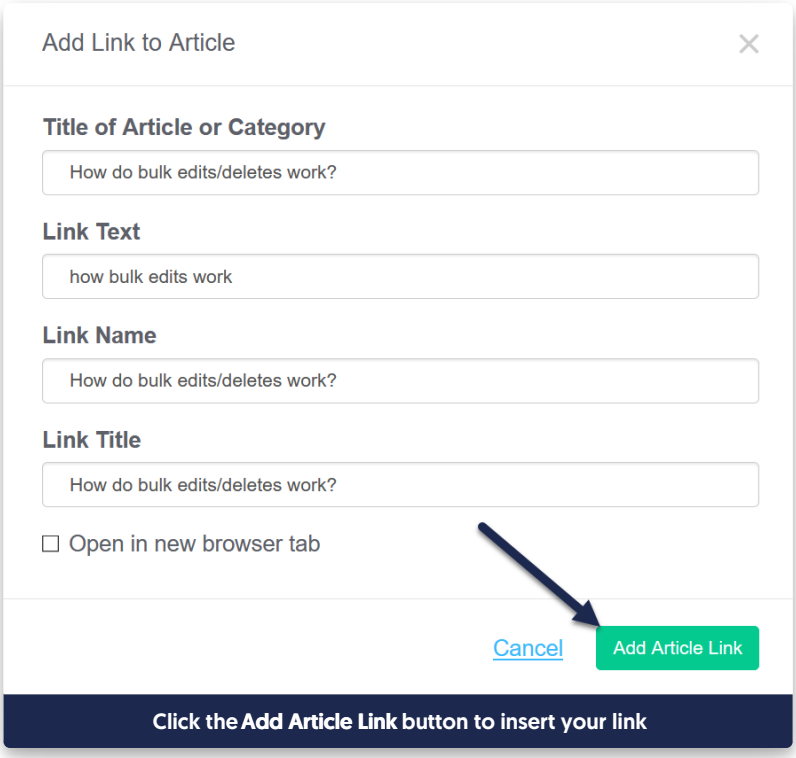


3. Type in the **Link Text** you'd like to use. This is the text that KnowledgeOwl displays on the page for the link.
4. The **Link Text**, **Link Name**, and **Link Title** will automatically be set to the article or category's title. You can

overwrite these if you want:

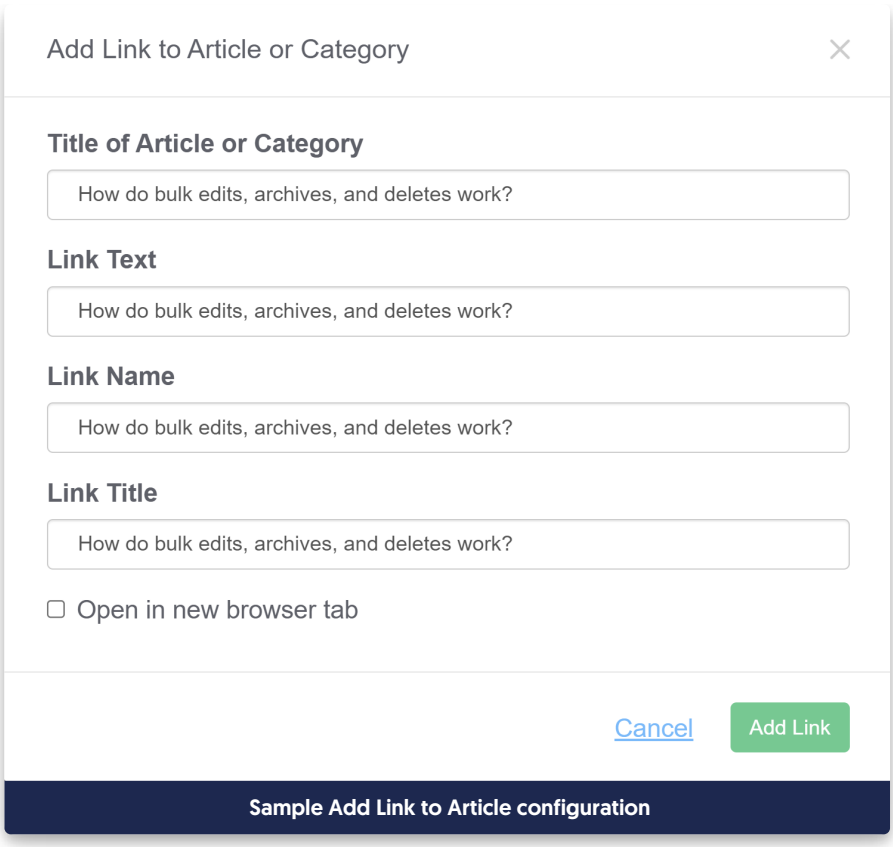
- **Link Text** is the text that appears in your article. We recommend adjusting this if the article title doesn't make sense in the context of the article, or to change capitalization, and so on.
- **Link Title** is text that displays when someone hovers over the link.
- **Link Name** is a largely unused link field now in modern web design, but may still be used by some accessibility tools. We recommend using identical text for the **Link Title** and the **Link Name**.

5. By default, links open in the same tab. You can set them to open in a new tab by checking the box next to **Open in new browser tab**.
6. Once you've finished editing the link, select **Add Link** to insert the link into your article.



Once inserted, you can edit the hyperlink in the future as you would any other hyperlink.

Here's a sample for a link to an article we have called "How do bulk edits/deletes work?" This inserts a link that looks like this: how bulk edits work.



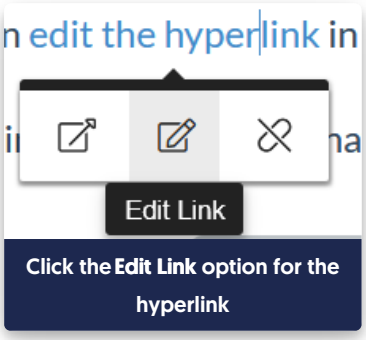
Sample Add Link to Article configuration

How can I tell if a link to an article or category was created using Link to Article or Category?

Hyperlinks inserted this way don't use the normal article URL as the URL for the hyperlink. Instead, they use a specially-structured code that references the article ID that begins with hg-id.

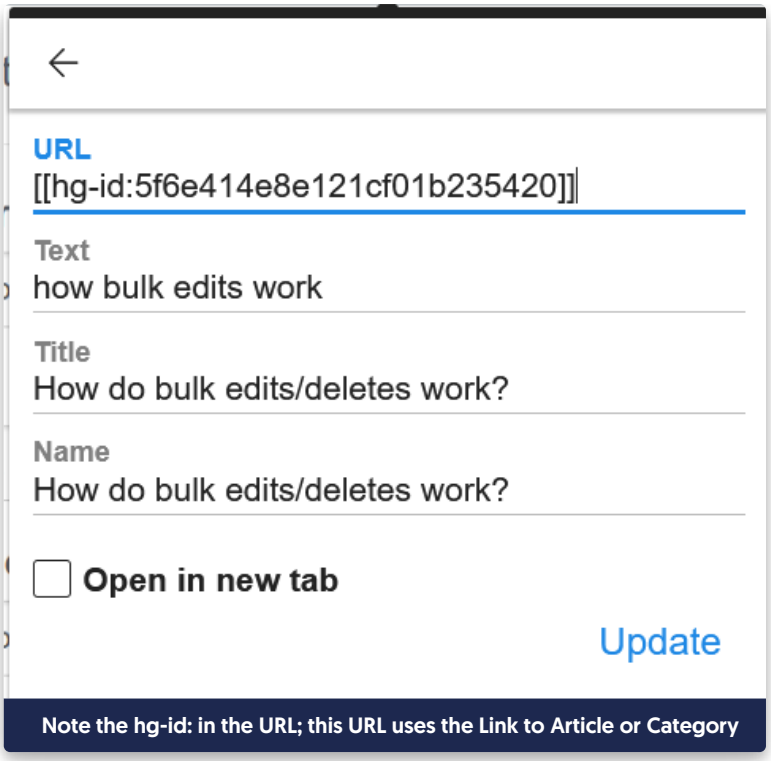
If you'd like to check if a hyperlink was created using this method:

1. **Click on the hyperlink.**
2. **Click the Edit Link icon.**



Click the **Edit Link** option for the hyperlink

3. **This will open a pop-up with the link details. If the hyperlink URL includes hg-id: followed by a long string of letters and numbers, it was created using Link to Article or Category:**


URL
[[hg-id:5f6e414e8e121cf01b235420]]
Text
how bulk edits work
Title
How do bulk edits/deletes work?
Name
How do bulk edits/deletes work?
Open in new tab
Update
Note the hg-id: in the URL; this URL uses the Link to Article or Category

Full and short titles

Last Modified on 05/29/2024 5:28 pm EDT

Every article has its Full Article Title, which is what displays at the top of your article. There is also an optional short title, which is used in the table of contents.

Internal note

Last Modified on 11/12/2024 3:04 pm EST

Sometimes, you need a place to leave notes for other authors (or yourself) that isn't the Version Notes field. This might include notes on who the subject matter expert is, or that if you update this article, you should also update another article, or some type of quality control note (such as Article Confidence levels if you use KCS).

This type of note is exactly what we designed the **Internal Note** field for.

Internal notes:

- Are notes you want front-and-center when you or other content creators are editing a given article or category.
- Are displayed only in app.knowledgeowl.com, not to your readers.
- Accept very simple HTML markup, so you can include hyperlinks and lists.
- Will be displayed at the top of ALL versions of the article.
- Are available in the Manage Articles CSV export.
- If used in a template article, will be copied to new articles created from that template.
- If in an existing article, will be copied when a new article is created from that existing article.

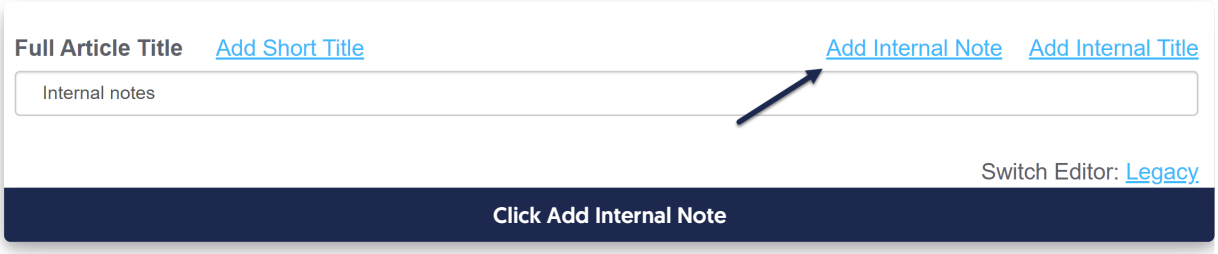
Add an internal note

Authors with the default Editor or Writer role can add internal notes. If you're using a custom role, you'll need to have the **Internal Notes** Permission to Create new internal notes.

Authors who don't have permissions to create, edit, or delete internal notes will still be able to see internal notes created by other authors who do.

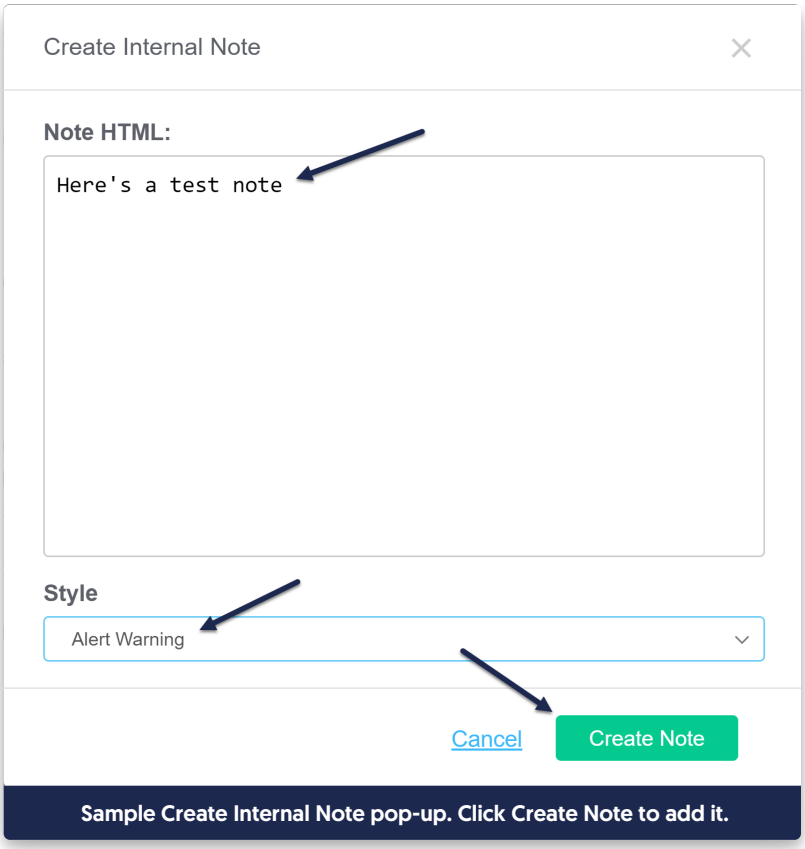
To add an internal note:

1. Select the **Add Internal Note** link to the right of the title:



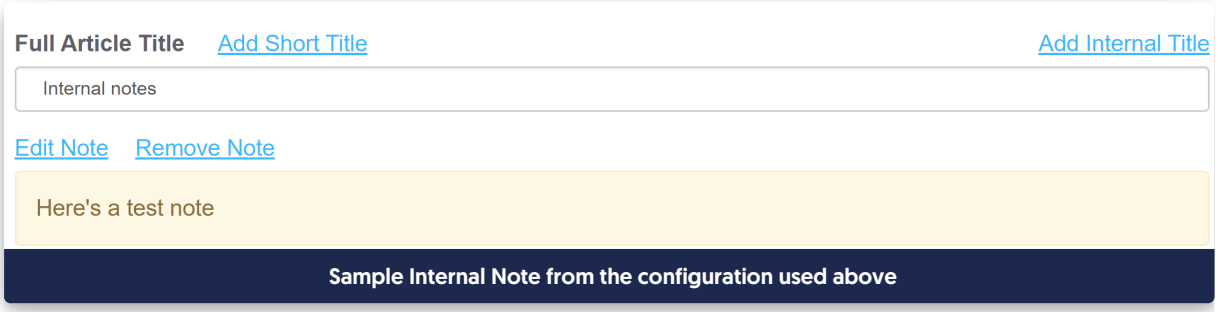
2. Add the HTML you want to use for your note. If you're just putting in regular sentences, you don't need to add HTML, but you can use it for formatting lists, hyperlinks, and so on.

3. Select the style you want to use for your note from the dropdown; we default to Alert Info. Here, we've added a one-line note and selected the Alert Warning style.



Sample Create Internal Note pop-up. Click Create Note to add it.

4. Select **Create Note**.
5. This creates the note and displays it using the style you selected between the title and the editor. You do not need to resave the article itself for the note to be saved.



Sample Internal Note from the configuration used above

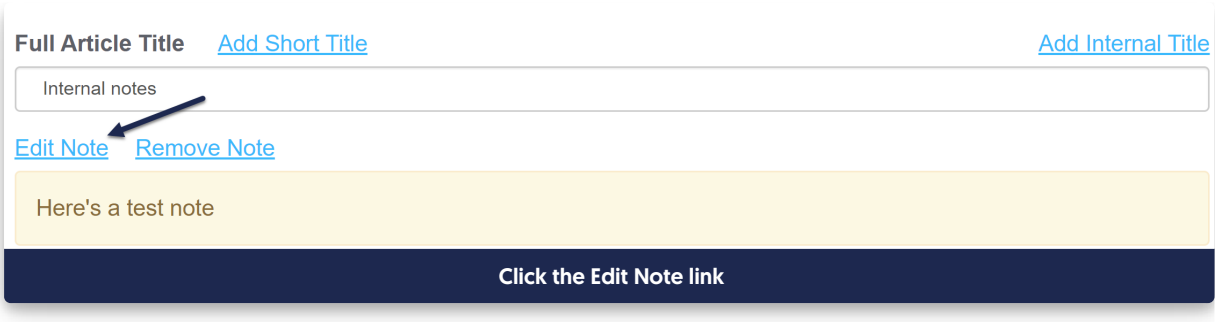
Edit an internal note

Authors with the default Editor or Writer role can edit internal notes. If you're using a custom role, you'll need to have the **Internal Notes** Permission to Edit internal notes.

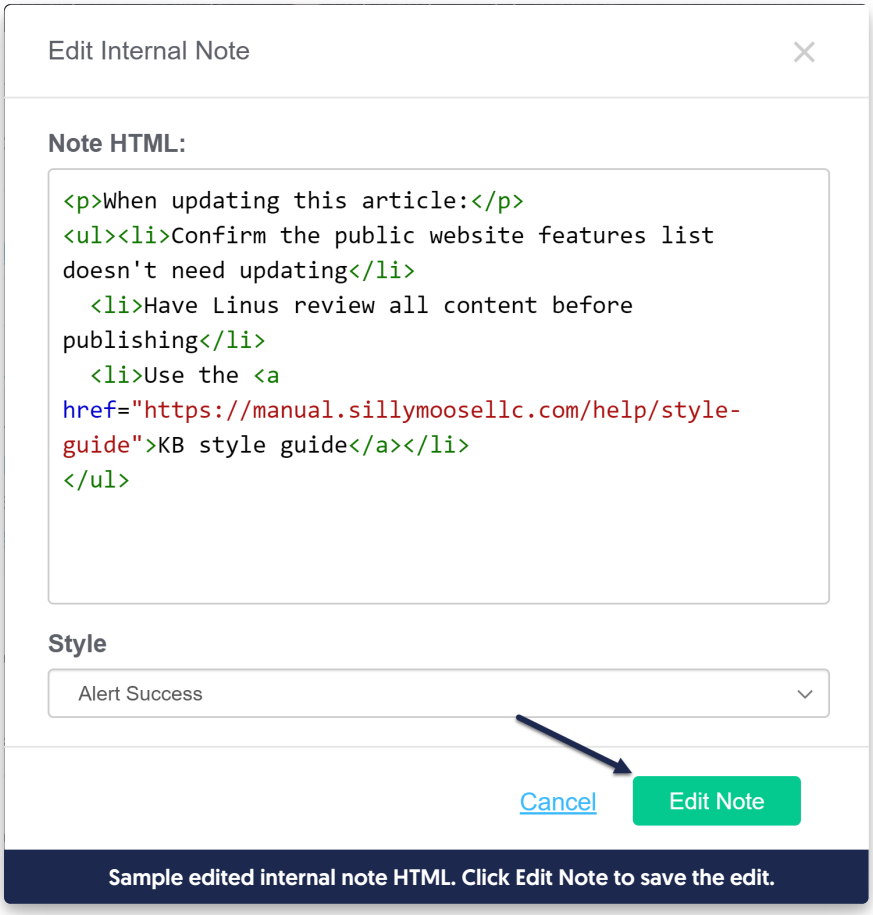
Authors who don't have permissions to create, edit, or delete internal notes will still be able to see internal notes created by other authors who do.

Once an internal note exists, you can edit it to make updates. To do so:

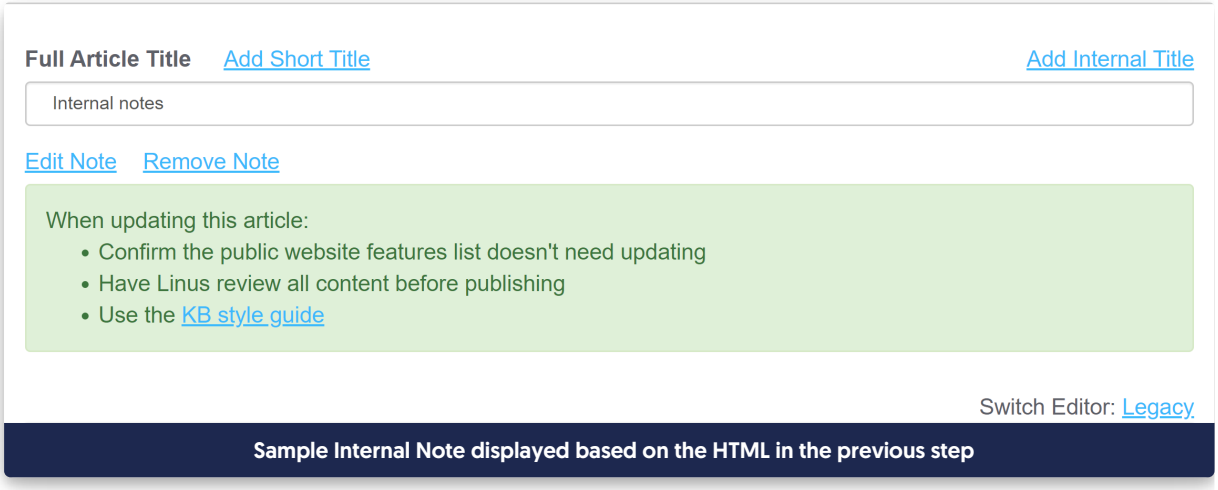
1. Select the **Edit Note** link that appears just above the note:



2. **Edit the HTML or change the style as you'd like. Once you're done making changes, select Edit Note to save your changes. Here, we've added a more complex note with a list:**



3. **The note updates immediately based on the changes you made. You do not need to resave the article or category itself for the note to be saved.**



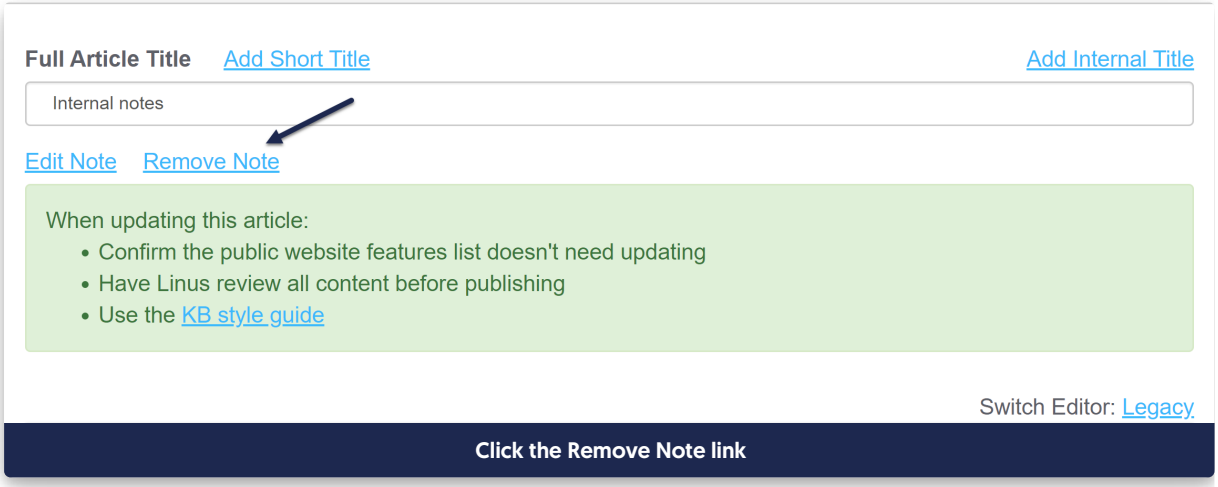
Remove an internal note

Authors with the default Editor or Writer role can remove internal notes. If you're using a custom role, you'll need to have the **Internal Notes** Permission to Remove internal notes.

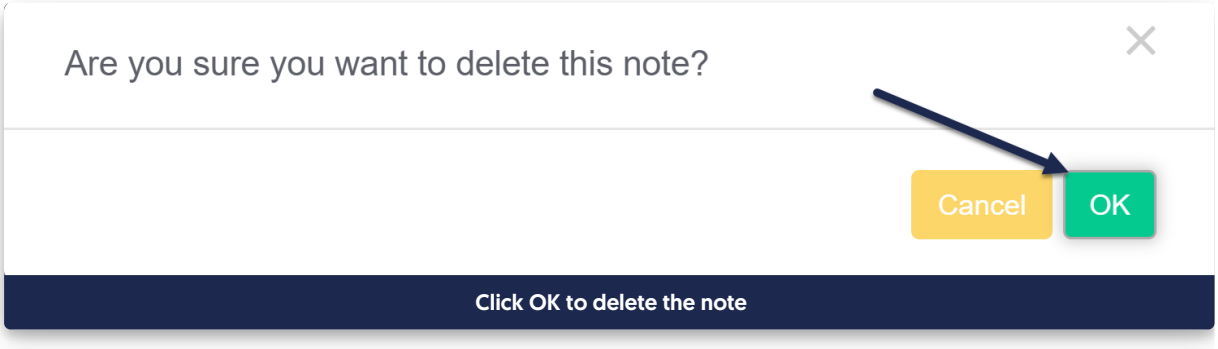
Authors who don't have permissions to create, edit, or delete internal notes will still be able to see internal notes created by other authors who do.

To delete an internal note completely:

1. Select the **Remove Note** link that appears just above the note:



2. A confirmation window will pop-up to be sure you want to delete the note. Select **OK** to delete the note.



3. The note is deleted immediately; you do not need to resave the article or category for the deletion to complete.

What HTML is supported in internal notes?

We've kept these notes pretty lean. They will support HTML:

- **Paragraph** `<p>`
- **Numbered list** `<ol>`
- **Bulleted list** `<ul>`
- **List items** `<li>`
- **Hyperlinks** `<a href="www.mylink.com">Link text</a>`
- **Bold text** `<b> or <strong>`

- **Italics** `<i>`
- **Paragraph breaks** `<br>`
- **Headers, e.g.** `<h1>`

Internal title

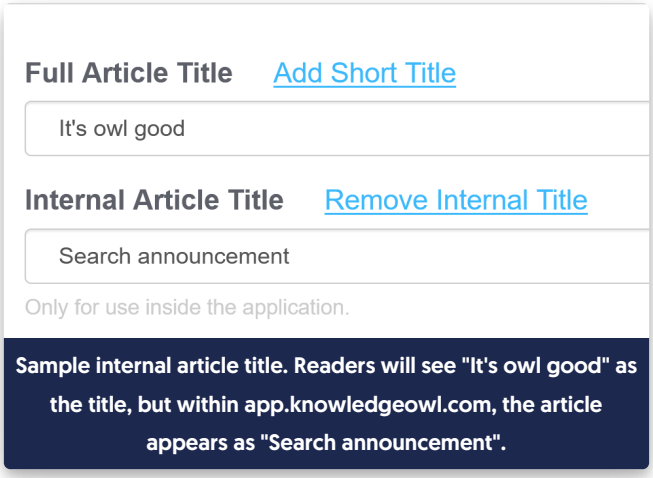
Last Modified on 05/29/2024 5:28 pm EDT

For each article, besides adding a short title to be used in the table of contents, you can also add an internal title. Internal titles are used only within app.knowledgeowl.com - they aren't things your readers see when viewing the knowledge base.

Internal titles can be useful when you have a lot of articles with very similar names, just in different categories, and you want to be sure you're selecting the correct article when you use:

- The Insert Link to Article option in Modern Editor
- The Related Articles section

They can also be useful when you want to call an article one thing to your readers, and something else to your content contributors.



KnowledgeOwl displays the internal title instead of the full article title in these places within app.knowledgeowl.com:

- The **Articles** hierarchy
- The **Find Articles** search in the lower left corner
- The Manage Articles interface (search and article list)
- The Manage Articles CSV export > Customizations > Internal Title column
- The Insert Link to Article pop-up/search
- The Related Articles search
- The **Add Article** > **Copy from existing** search
- The Add Article > Share content from an existing article search
- If the article is a shared content article, the internal title will be used in the shared content messages in the editor

To add an internal title:

1. With the article open in the editor, click the **Add Internal Title** link to the right of **Full Article Title.**
2. Enter the title you want to use in the **Internal Article Title** box that appears.

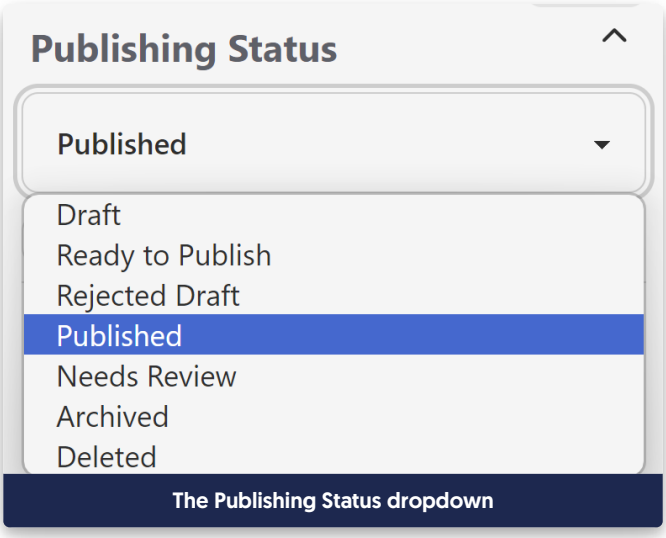
3. Select **Save**.

You can remove an internal title using the **Remove Internal Title** link in the editor.

Publishing status

Last Modified on 05/29/2024 5:28 pm EDT

All articles have a status. You can manually change the publishing status by selecting a new status in the **Publishing Status** dropdown, then saving the article:



The Publishing Status dropdown

The six statuses available are:

- Draft (default status for newly created articles)
- Ready to Publish
- Rejected Draft
- Published
- Needs Review
- Deleted

Draft

An article in Draft status is not visible to readers. This is the default status when you create a new article.

Ready to Publish | Rejected Draft

The Ready to Publish and Rejected Draft statuses are optional draft statuses, supporting your documentation editing and review workflow. Both of these statuses keep the article hidden from readers, like a Draft.

As an example, some articles need to be approved before being published. You can switch the status to Ready to Publish once it is ready for approval. The approver then reviews the article, and either changes the status to Published if approved, or switches it to Rejected Draft if it still needs work.

Published

A Published article is visible in your live knowledge base. If the article is restricted to specific Reader Groups, it will only be visible to readers who belong to those groups; otherwise, it is visible to anyone who has access to

your knowledge base.

Needs Review

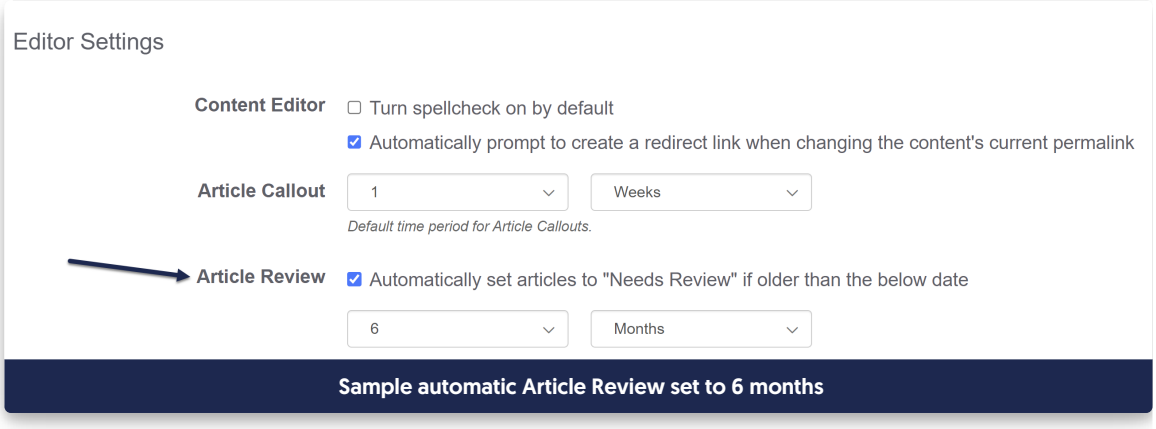
A Needs Review article is an optional Published status. Needs Review articles are still visible in your knowledge base, but you can use the status as a way to identify articles that need to be reviewed to be sure they're up to date, accurate, etc.

You can view all articles with the Needs Review status in **Manage**. This status is a great way of keeping your knowledge base up to date and relevant. You can regularly check for articles that require review, update them if necessary, and switch them back to Published status.

To set an article to Needs Review, you can:

- Manually set an article's status to Needs Review as a reminder to review it.
- Configure your knowledge base to automatically switch published articles to Needs Review if the article hasn't been updated within a specified period of time:

    1. Go to **Settings > Basic**.
    2. In **Editor Settings**, select **Automatically set articles to "Needs Review" if older than the below date**.
    3. Enter the time period. For example, select "6" in the first dropdown, and "Months" in the second, to set the time period to six months.



Sample automatic Article Review set to 6 months

    4. Select **Save** to update your settings.

See Editor Settings for more information on this setting.

Archived

Archived articles are not visible in your knowledge base. You can access them by navigating to **Manage > Archived**.

Most authors use Archived differently from Deleted, generally to show that something was at one time published/active in the knowledge base and isn't anymore.

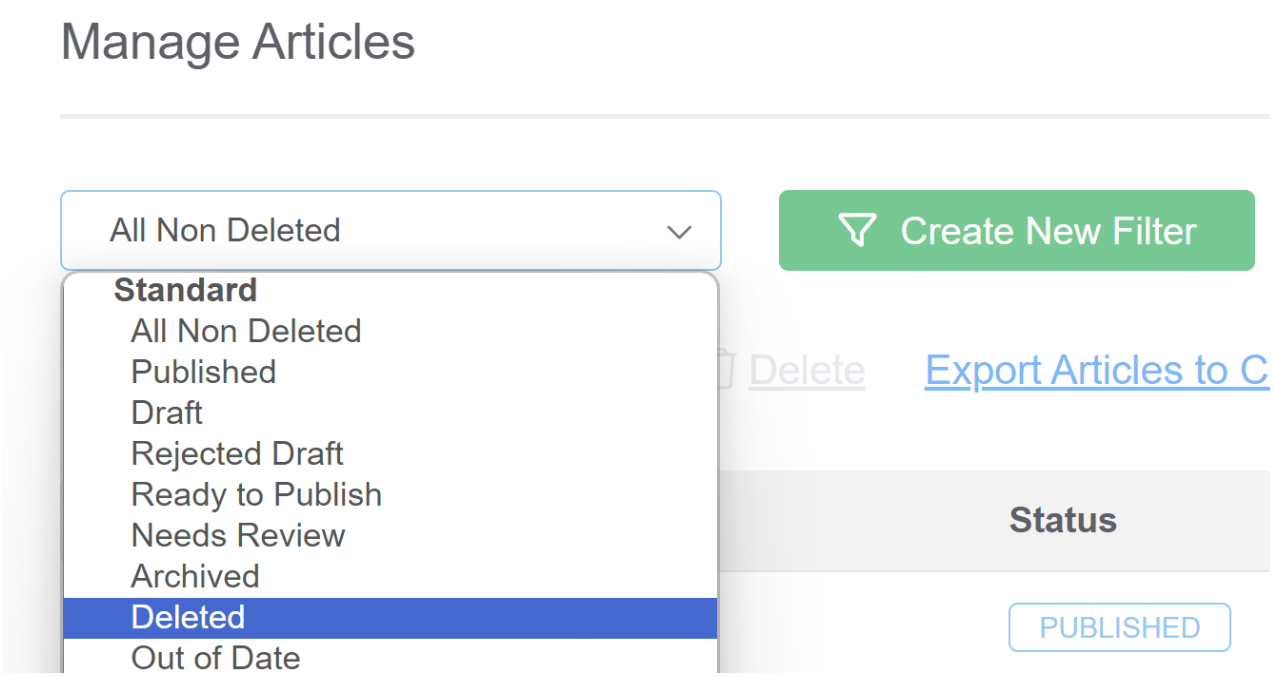
When you archive an article from within the Article Editor, you have the option to automatically redirect anyone hitting the archived article's URL to a different URL instead:



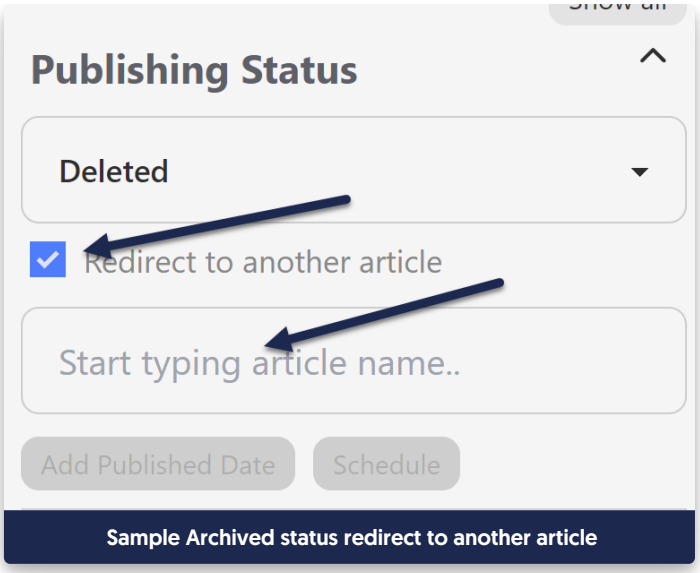
Check the box and then search for the article you'd like anyone who might find their way to this archived article to be redirected to. (If you don't do this, they'll likely just get a 404 page instead.)

Deleted

Deleted articles are not visible oin your knowledge base. You can access them by navigating to Manage > Deleted. See Recover a deleted article if you need to recover an article that was incorrectly deleted!



As with archiving, when you delete an article from within the Article Editor, you have the option to automatically redirect anyone hitting the deleted article's URL to a different URL instead:



Check the box and then search for the article you'd like anyone who might find their way to this deleted article to be redirected to. (If you don't do this, they'll likely just get a 404 page instead.)

Published date

Last Modified on 05/29/2024 5:28 pm EDT

The **Published Date** is an optional field in your articles, though we strongly recommend using it for articles within Blog style categories so that the reverse chronological order works properly!

Published Date allows you to specify the date that an article was published. This can be helpful:

- For compliance or audit purposes
- For blog style category displays

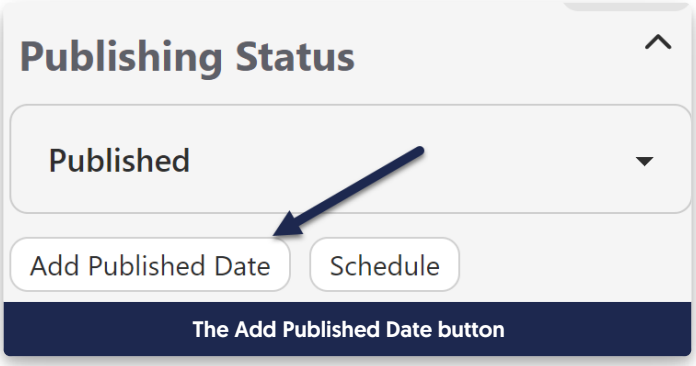
The published date is displayed:

- Within articles displayed in blog style categories
- In **Knowledge Base > Manage** CSV exports when the **Date Published** box is checked
- Anywhere the Article Date Published merge code is used `[article("date_published")]`

The Published Date is automatically set if you use the Schedule an article to be published feature.

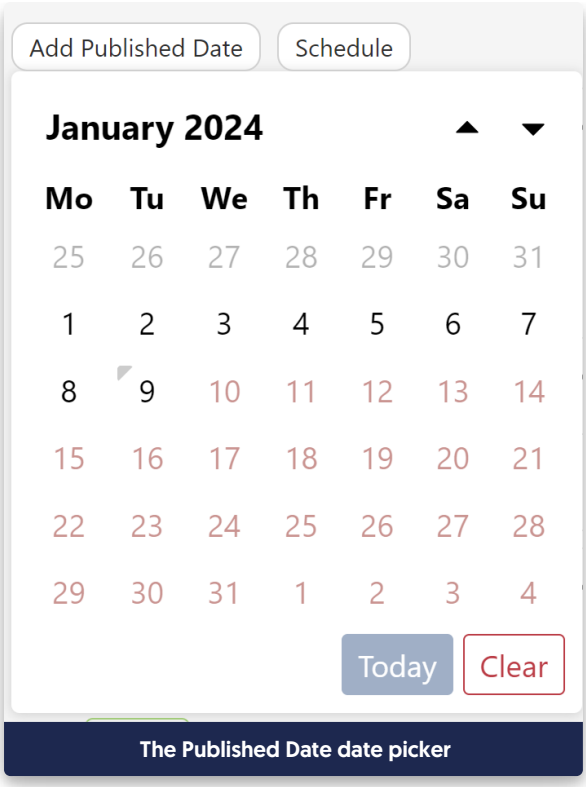
To add a Published Date to an article:

1. Open the article in the editor.
2. Select the **Add Published Date** option underneath the Publishing Status.



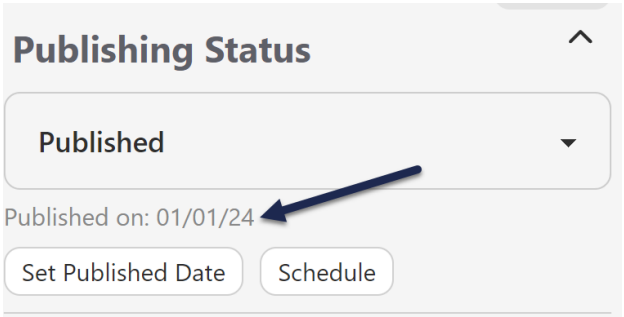
The Add Published Date button

3. Use the datepicker to find the date you'd like to use. You can only select today's date or dates in the past.



a. To pick a date in a previous month or year, click on the month + year label at the top of the date picker.

4. Once you click on a date, the picker will disappear and the selected date will display.

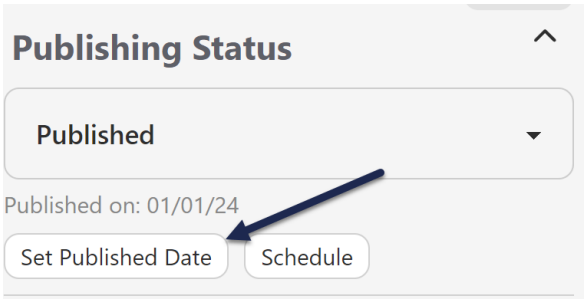


5. Be sure to **Save** changes to your article so the date fully updates!

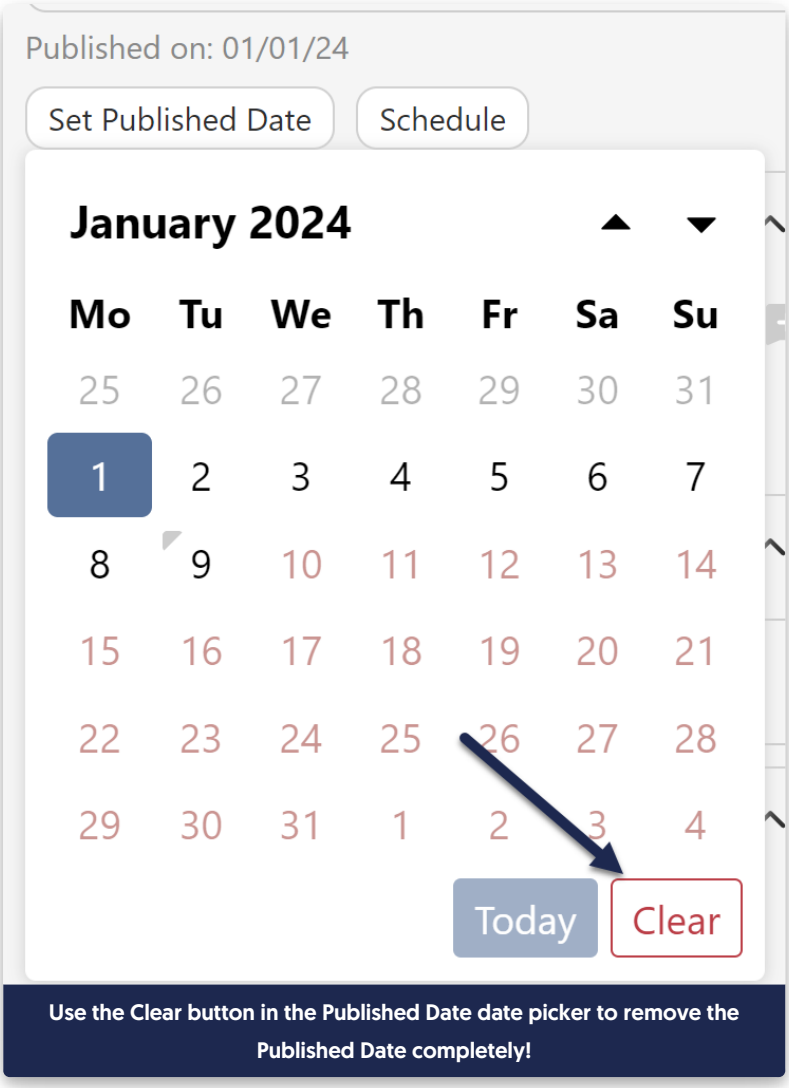
Change or remove a Published Date

If you already have a published date added to an article, you can change it or remove it completely by clicking on the **Set Published Date** option:

1. Open the article in the editor.
2. Click the **Set Published Date** option just below the Publishing Status.



3. To update the Published Date, select the new date.
4. To remove the Published Date, click the **Clear** option in the lower right of the picker.



5. Be sure to **Save** your changes!

Schedule an article to be published

Last Modified on 09/18/2024 4:10 pm EDT

If you'd like to publish a new article, there are several ways you can do so:

1. Edit the article directly to change the Publishing status to Published.
2. Bulk edit several articles at once in **Manage**, to publish them all at once.
3. Schedule the article to be published at a future day/time. This option is detailed more below.

All undeleted articles have the **Schedule** option just below the Publishing Status dropdown. Any article that is unpublished (doesn't have a publishing status of "Published" or "Needs Review") has the **To be published** option.

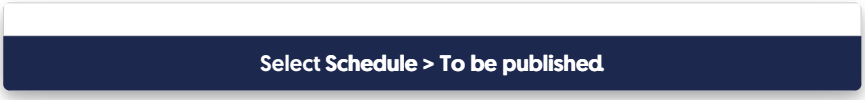
Using this option will prompt you to select a future day and time for the publication. Articles that are scheduled for publication will display:

- An alert across the top of the editor letting you know what/when they've been scheduled.
- The scheduled date/time and an option for you to remove them from the schedule in the righthand column of the editor.

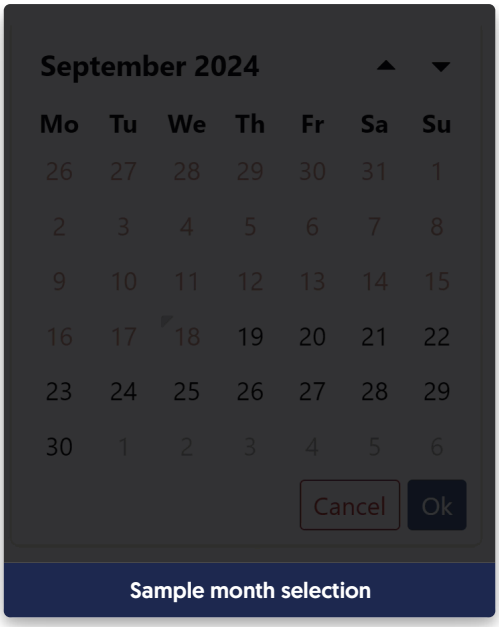
Schedule an article for publication

To schedule an article for publication:

1. Open the article you'd like to schedule in the editor.
2. In the upper right, just below the Publishing Status dropdown, select **Schedule**.
3. In the dropdown that appears, select **To be published**. (You won't see this option if the article is already Published or in a Needs Review status.)

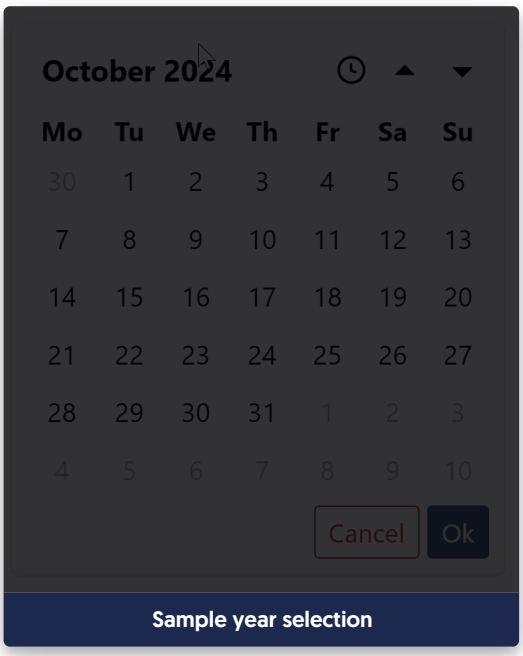


4. This will open a calendar picker where you can complete your scheduling details.
5. First, use the date picker select the date you'd like your article to be published on. This must be at least one day in the future, but you can schedule as far out as you'd like.
    a. By default, the picker shows the current month; you can jump to a different month by selecting the <month year> label at the top and then selecting the month you'd like.



Sample month selection

b. To jump to a different year, select the <month year> label at the top and select the year.

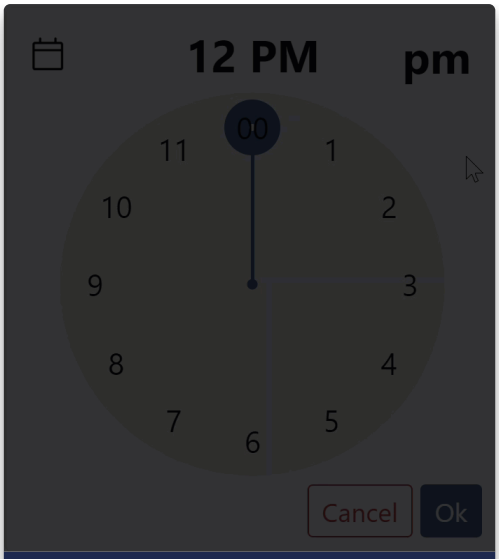


Sample year selection

6. Once you find the date you'd like to use, select it. This will select the day and move you into the time picker. The time zone displayed and used depends on the time zone set for your knowledge base in **Settings > Basic**.

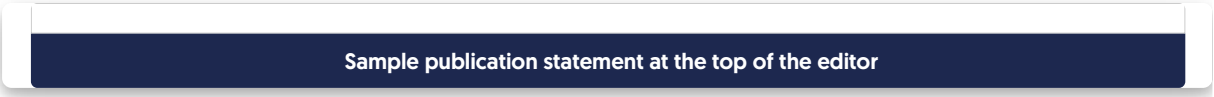
7. Select the hour you'd like to publish the article. Actual publication generally occurs 10-15 minutes after the selected hour in the displayed time zone.

   a. To toggle between AM or PM, select the lowercase "am" or "pm" in the upper right corner of the picker.

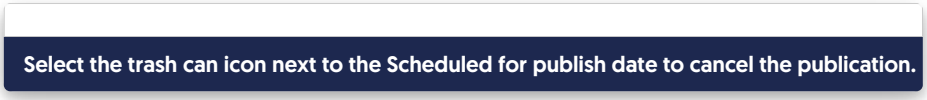


Sample time selection

8. Once you've finished making your selections, select **Ok** in the lower right to finalize the schedule.
9. Once your schedule is added, the editor displays an alert across the top with the details of the schedule:


Sample publication statement at the top of the editor

10. The righthand column also shows the scheduled publication date. If you need to cancel or edit the schedule in any way, remove it by selecting the trashcan icon there. Refer to Edit or remove an article's scheduled publication or archival for more information.


Select the trash can icon next to the Scheduled for publish date to cancel the publication.

How publication schedules work

When the day and hour arrives, we run a scheduled job in the background to process your scheduled articles. Typically you'll see the scheduled article publish around :10 or :15 after the hour you selected.

What you can expect to see:

- The status will change to Published.
- The Published Date will automatically update to use the date you scheduled the publication.
- The Last Modified date will update when the schedule has run.
- If you added a New or Updated callout, it will display when the article is published. (As long as the callout's expiration date isn't in the past!)
- If you use webhooks, the `article.statuschange` and `article.publish` webhooks should update to reflect the change.
- If you use Subscriptions and included a New or Updated callout, this article will be included in your next scheduled subscription notification email. (As long as the callout's expiration date hasn't passed!)

Schedule an article to be archived

Last Modified on 09/18/2024 4:10 pm EDT

You can archive an existing article in several ways:

1. Edit the article directly to change the Publishing status to Archived.
2. Bulk edit several articles at once in **Manage** to archive them all at once.
3. Schedule the article to be archived at a future day/time. This option is detailed more below.

All undeleted articles have the **Schedule** option just below the Publishing Status dropdown and have the option to **To be archived** within it.

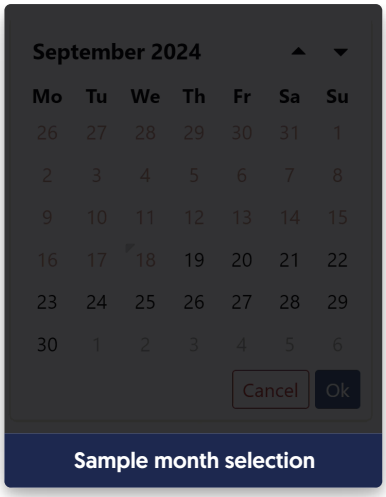
Using this option will prompt you to select a future day and time for the archival. Articles that are scheduled for archival will display:

- An alert across the top of the editor letting you know what/when they've been scheduled.
- The scheduled date/time and an option for you to remove them from the schedule in the righthand column of the editor.

Schedule an article for archival

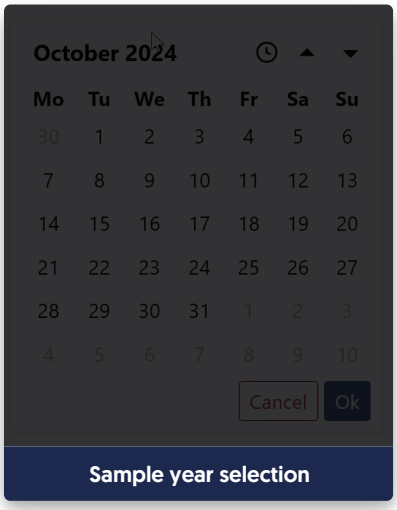
To schedule an article for archival:

1. Open the article you'd like to schedule in the editor.
2. In the upper right, just below the Publishing Status dropdown, select **Schedule**.
3. In the dropdown that appears, select **To be archived**.
4. This will open a calendar picker where you can complete your scheduling details.
5. First, use the date picker select the date you'd like your article to be archived on. This must be at least one day in the future, but you can schedule as far out as you'd like.
    a. By default, the picker shows the current month; you can jump to a different month by selecting the <month year> label at the top and then selecting the month you'd like.



Sample month selection

b. To jump to a different year, select the <month year> label at the top, select the year, then select the year you'd like to switch to.

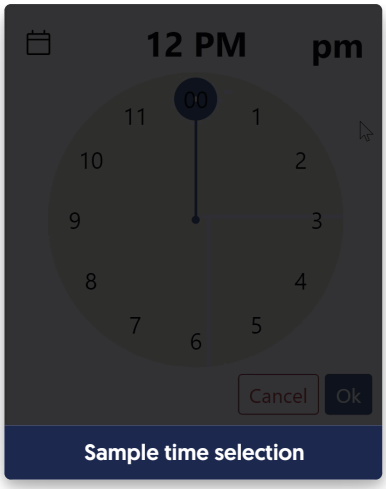


Sample year selection

6. Once you have the correct month and year open, select the day you'd like to use. The picker updates to the time picker. The time zone displayed and used depends on the time zone set for your knowledge base in **Settings > Basic**.

7. Select the hour you'd like to archive the article. Archival generally occurs 10-15 minutes after the selected hour in the displayed time zone.

   a. To switch between AM or PM, select the lowercase **am** or **pm** in the upper right corner of the picker.



Sample time selection

8. Once you've finished making your selections, select **Ok** in the lower right to finalize the schedule.
9. Once your schedule is added, the editor displays an alert across the top with the details of the schedule:


Sample scheduled archival callout at the top of the editor

10. The righthand column also shows the scheduled publication date. If you need to cancel or edit the schedule in any way, remove it by selecting the trashcan icon there. Refer to Edit or remove an article's scheduled publication or archival for more information.


Scheduled for archive information in righthand column

How archival schedules work

When the day and hour arrives, we run a scheduled job in the background to process your scheduled articles. Typically you'll see the scheduled article archive around :10 or :15 after the hour you selected.

What you can expect to see:

- The status will change to Archived, and the article will no longer be available in your live knowledge base. Refer to Publishing status for more details on the Archived status.
- The Last Modified date will update when the schedule has run.
- If you use webhooks, the `article.statuschange` and `article.archive` webhooks should update to reflect the change.

Edit or remove an article's scheduled publication or archival

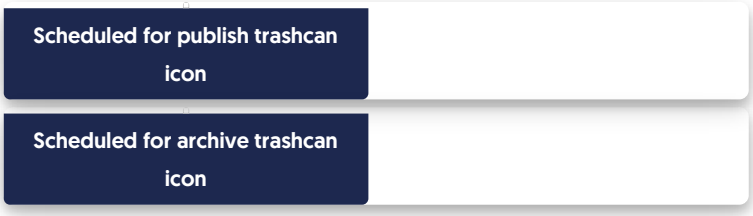
Last Modified on 09/18/2024 4:14 pm EDT

If you've scheduled an article to be published or scheduled an article to be archived, the only way to edit that schedule is to remove it entirely and create a new one.

You might also want to remove the article's schedule completely.

In both situations, you'll first need to remove the existing schedule. To do so:

1. Open the article in the article editor.
2. Look for the text in the righthand column that provides details on the scheduled archival/publication. The wording is slightly different for each, but the format and location are the same, directly underneath the **Publishing Status** dropdown.
3. Select the trashcan icon to the right of the "Scheduled for..." statement:



4. This will automatically remove the scheduled archival or publication from the article.
5. If you'd like to set a new schedule, you can follow the steps to add one. See Schedule an article to be published and Schedule an article to be archived, respectively.

Article callouts (New, Updated, and Video)

Last Modified on 05/29/2024 5:28 pm EDT

Want to draw attention to video content, or content that is brand-new or recently updated?

KnowledgeOwl gives you several Article Callout options to do just this. Callouts are a great way to visually let your readers know about video content, newly-published content, and changes to existing content!

Callout display

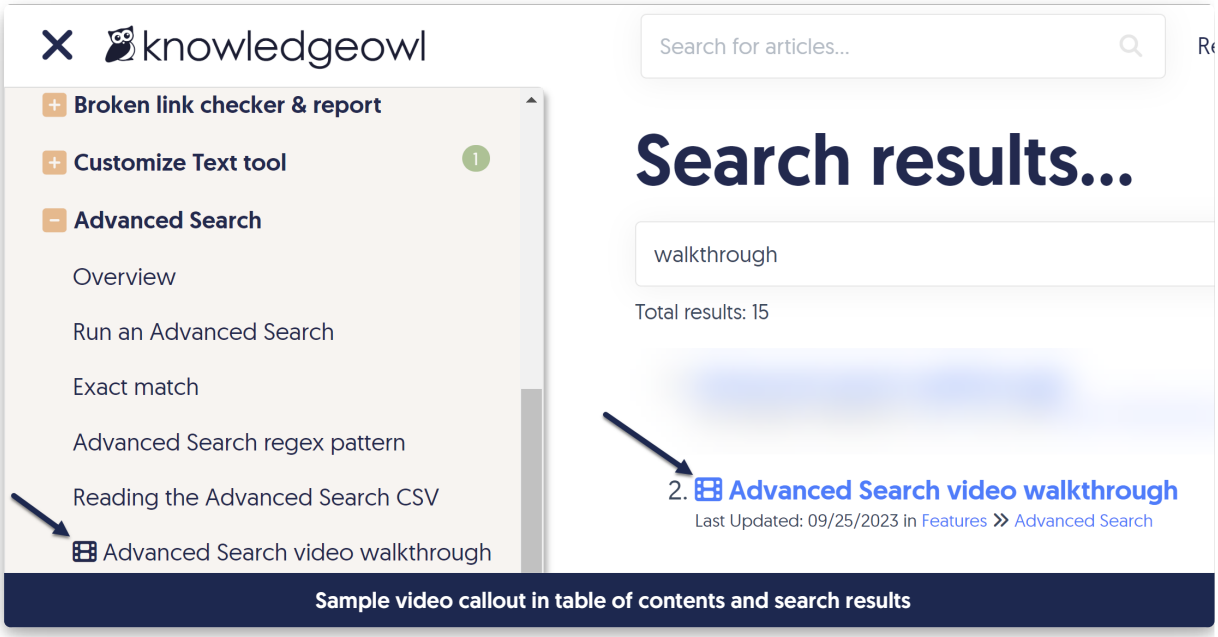
Callouts are displayed:

- **In the table of contents next to the article**
  - **For New/Updated callouts, these callouts will also roll-up to the category to indicate the category contains New/Updated content**
- **In Article Lists**
- **Next to the article when it is displayed in search results (video content will display to the left; New/Updated to the right)**
- **In default category landing pages**

Callout types

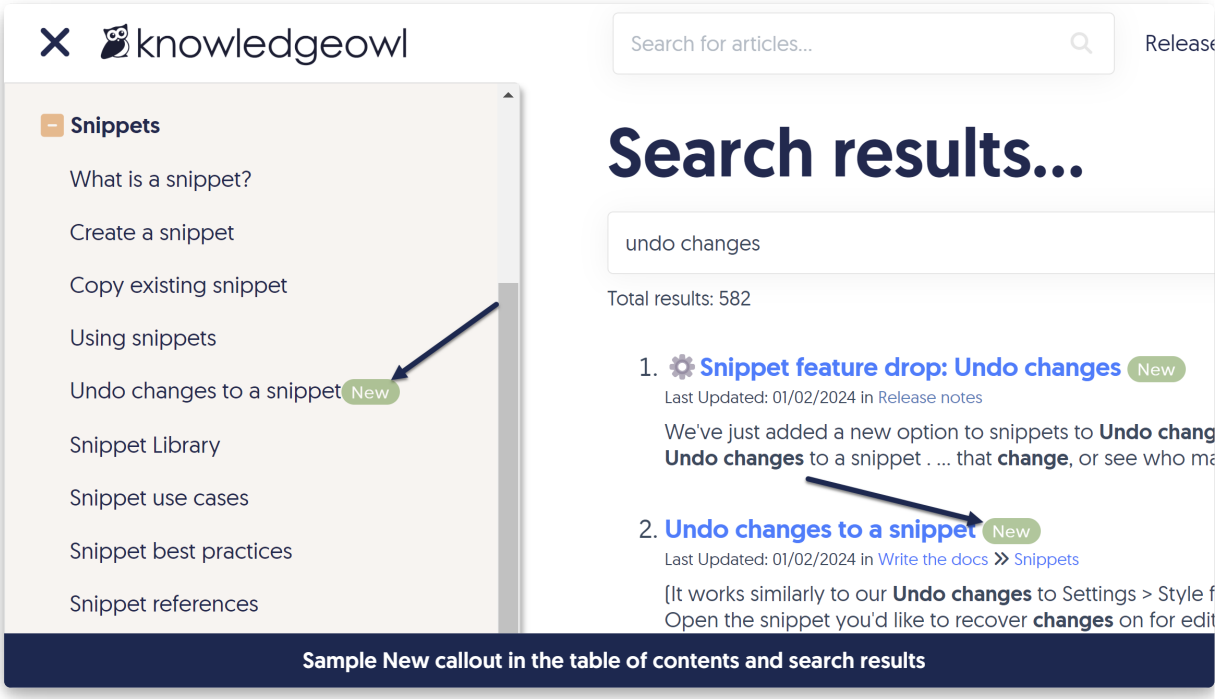
There are three callout types. One is designed to identify the type of content; the others are designed to provide time-relevant notification of New/Updated content:

1. **Video Content: This adds a video icon to the left of the article title. It will display until you manually remove it and will display everywhere the article title is used:**

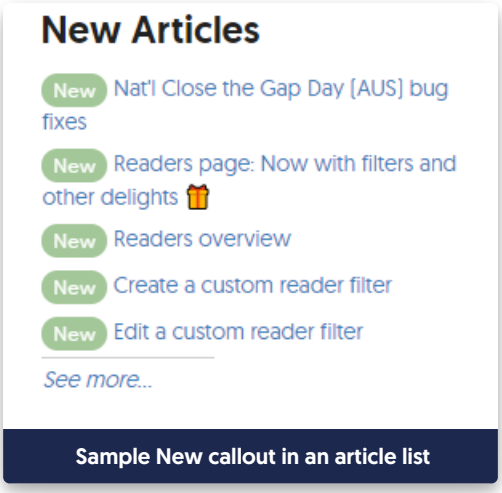


Sample video callout in table of contents and search results

2. **New: This adds a green "New" badge next to the article title and will automatically be removed after the expiration date. This callout will trigger Subscriptions notifications if that feature is enabled:**

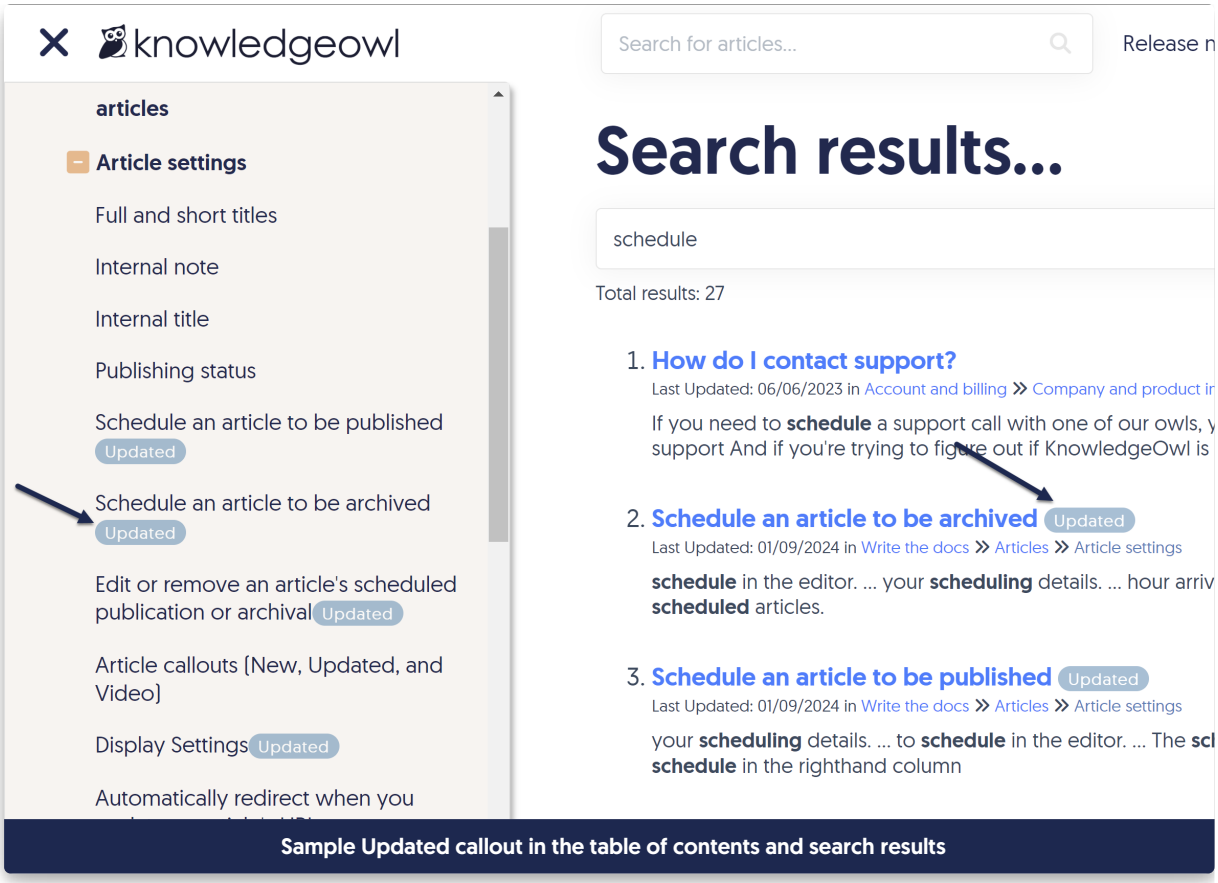


Sample New callout in the table of contents and search results



Sample New callout in an article list

3. **Updated callout: Adds a blue "Updated" badge next to the article title and is automatically removed after the expiration date. This callout will trigger Subscriptions notifications if that feature is enabled:**

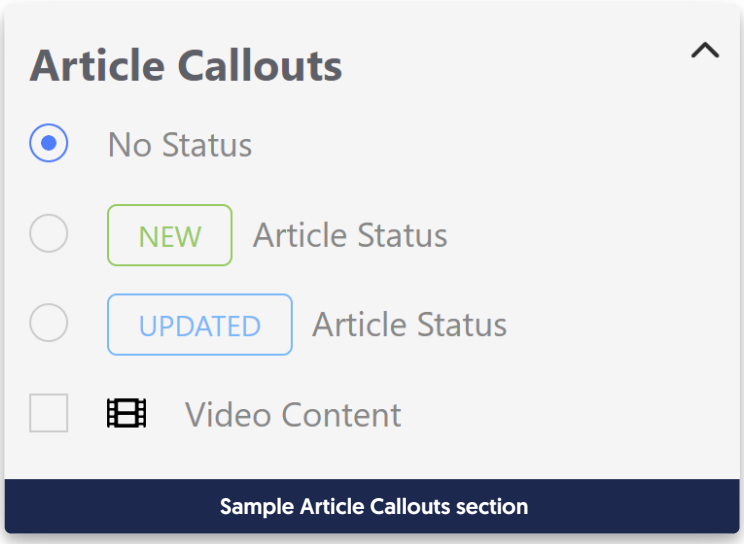


Sample Updated callout in the table of contents and search results

Using callouts

To add callouts:

1. **Open your article for editing.**
2. **Select the callout(s) you want from the Article Callouts menu:**



Sample Article Callouts section

3. **For New or Updated status, a Status Expiration date will be automatically added based on your knowledge base's settings. Once the status expires, the callout is automatically removed from the article.**
    - **You can manually override the date by clicking in the date field and using the date picker that appears.**

4. Be sure to **Save** your article. The callout is immediately visible to your readers.



The **Video Content** callout can be checked in addition to any one of the **No Status, New** and **Updated** callouts.

Setting up default expiration dates for New/Updated callouts

By default, all New and Updated callouts will expire in one week.

You can change the default used across your knowledge base:

1. Go to **Settings > Basic**.
2. Scroll to the **Editor Settings** section.
3. Change the **Article Callout** dropdowns to set the number and measure of your choice. (Options include numbers 1-12 and durations of days, weeks, or months.)
4. **Save** your changes.

This will update the default date that gets generated whenever a callout is added; authors can manually edit/override that date. See Basic Settings for more information.

Display Settings

Last Modified on 07/17/2024 12:19 pm EDT

Using the **Display Settings** options in an article, you can limit where the article is displayed in the knowledge base and some functionality within the article itself. The **Display Settings** section is available in the right hand column of the article editor, near the bottom of the page:



The available restrictions are:

1. **Exclude from search results**: when this box is checked, the article is always hidden from your knowledge base search results. It's still available by URL, and may be available in other navigation and lists depending on the settings you check below.
2. **Hide from the table of contents**: this hides the article from the table of contents. If you're using the Contextual Help Widget 2.0, it also hides the article from the **Knowledge** tab in that widget.
3. **Hide from homepage / category landing page**: this hides the article from the landing page for the category it's found in, or the homepage if the article isn't within a category landing page.
4. **Hide from article lists**: this hides the article from the homepage/right hand column New Articles List, Popular Articles List, and Updated Articles List. It doesn't hide the article from the Recent Articles List or Article Favorites.
5. **Remove "PDF" icon**: this option removes the PDF download icon from the article. (This might be a good idea for video content, for example.)
6. **Remove feedback ability**: this option removes the Ratings section in the article.
7. **Remove comment ability**: this option removes the Comments section from the article.

Automatically redirect when you update an article's URL

Last Modified on 05/29/2024 5:27 pm EDT

You can use the Old Links feature to 301 redirect retired permalinks and articles to a new location. You have two options for using old links:

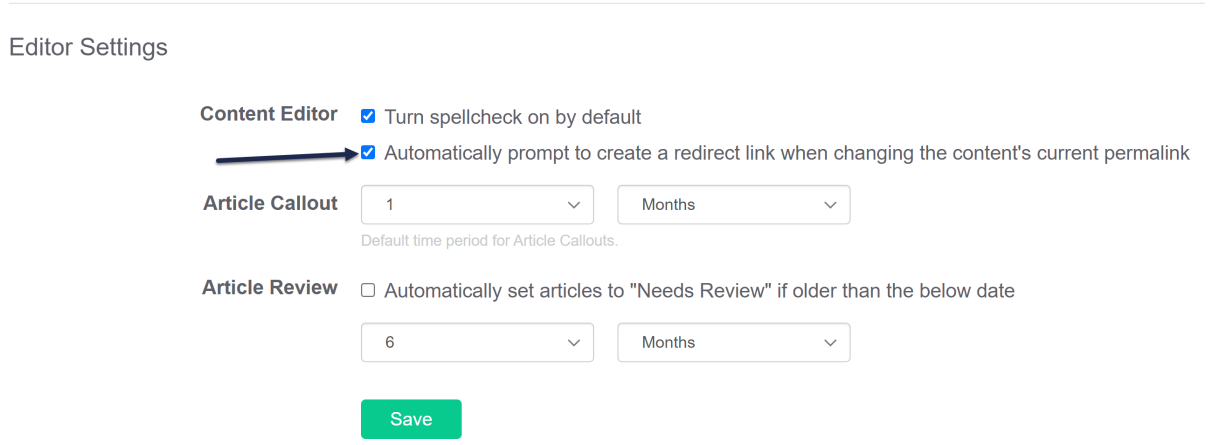
- Enabling a setting so that when you change a permalink and save the article or category, we will prompt you to automatically add the previous permalink as an old link
- Adding old links manually

Here, we talk about how to enable automatic permalink detection/old link updates.

With this setting enabled, if you edit an article or category to change its permalink, when you click the **Save** button in the editor, you'll be prompted to add the permalink you just removed as an Old Link. If you click Yes, we'll automatically add the Old Link for you. We recommend turning this feature on, as it can make it much easier to add Old Links.

To do so:

1. Go to **Settings > Basic**.
2. Go to the **Editor Settings** section.
3. Check the box next to **Automatically prompt to create a redirect link when changing the content's current permalink**.



4. **Save** your changes.

With this enabled, once you edit a permalink in an article or category and click the editor **Save** button, you'll see a pop-up like this, asking if you'd like to add the previous permalink as an old link:



Clicking Yes will automatically add the old link for you.

Clicking No will leave the old links as they are.

Redirect old articles to a new permalink

Last Modified on 05/29/2024 5:28 pm EDT

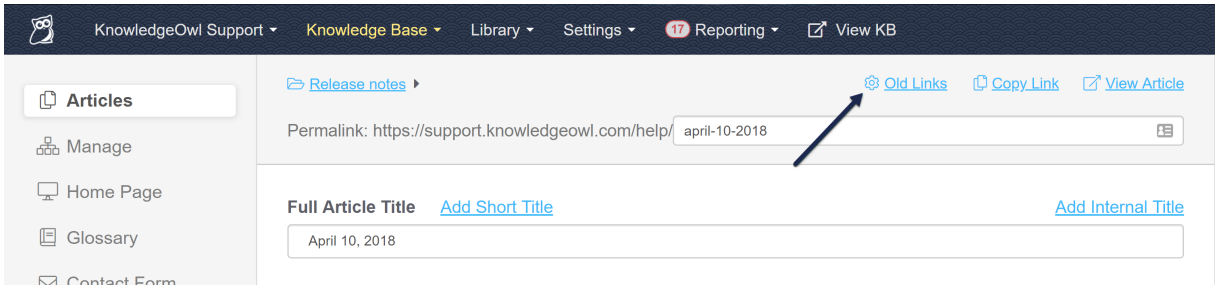
You can use the old links feature to 301 redirect retired permalinks and articles to a new location. You have two options for using old links:

- Enabling a setting so that when you change a permalink and save the article or category, we will prompt you to automatically add the previous permalink as an old link
- Adding old links manually

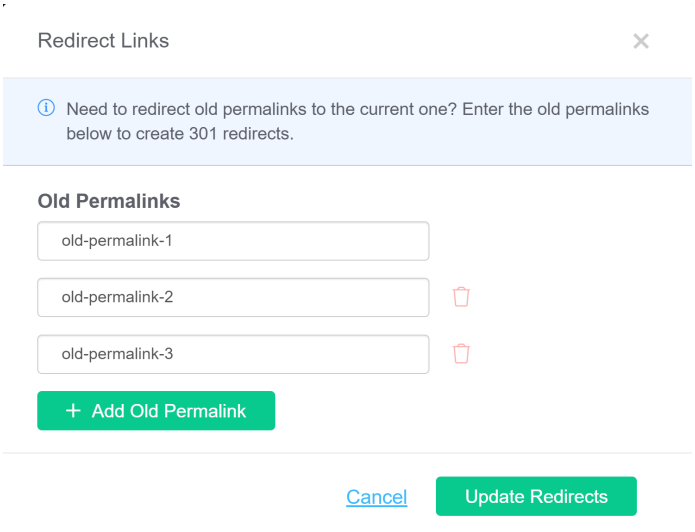
Here, we'll show you how to manually add an Old Link.

To manually add old links:

1. Open the article or category in the editor.
2. Click on the **Old Links** hyperlink at the top of the editor.

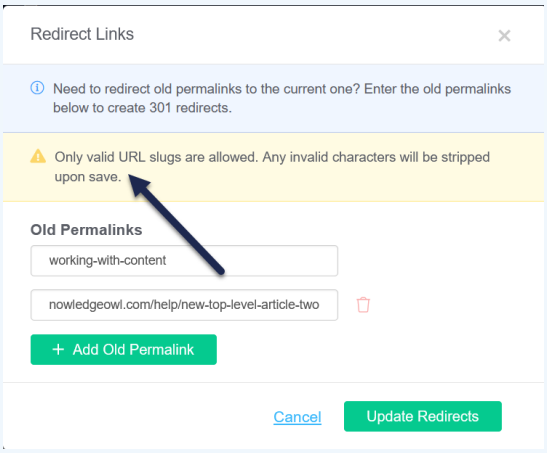


3. Specify the old permalinks that should redirect to this new article.



4. Click on the **Update Redirects** button to save those redirects.
5. **Save** your article or category in the editor.

Note: You only need to copy the editable portion of the permalinks (for example, april-10-2018, not https://support.knowledgeowl.com/help/april-10-2018). So in this example, old-permalink-1, old-permalink-2, and old-permalink-3 are the previous permalinks I want to redirect to april-10-2018. If you try to add a full permalink, you'll see a warning message:



For old link redirects referencing a separate article (the first use case below), the old link articles you want to redirect need to be in an unpublished status--either Draft or Deleted.

Use cases

Old links let you redirect permalinks for old/outdated links to a current article. There are two primary use cases for old links:

1. When you've written a new article that "replaces" an existing article.
2. When you've updated an article's permalink due to title or content changes.

Let's look at each of these in turn.

Replacing an existing article

Linus, our trusty owl, has written an article called **Giving a hoot about knowledge**, and the permalink was something like:

```
https://support.knowledgeowl.com/help/giving-a-hoot-about-knowledge
```

After that article was published, his marketing team used that permalink in a public blog post on owls and wisdom.

Now, let's suppose that Linus has since written a new and better version of this content called **Docs or it didn't happen:**

```
https://support.knowledgeowl.com/help/docs-or-it-didnt-happen
```

But Linus isn't sure all the places out in the wide world that referenced that giving a hoot article. And what if it was so brilliant that other people *also* referenced it, linked to it, or bookmarked it?

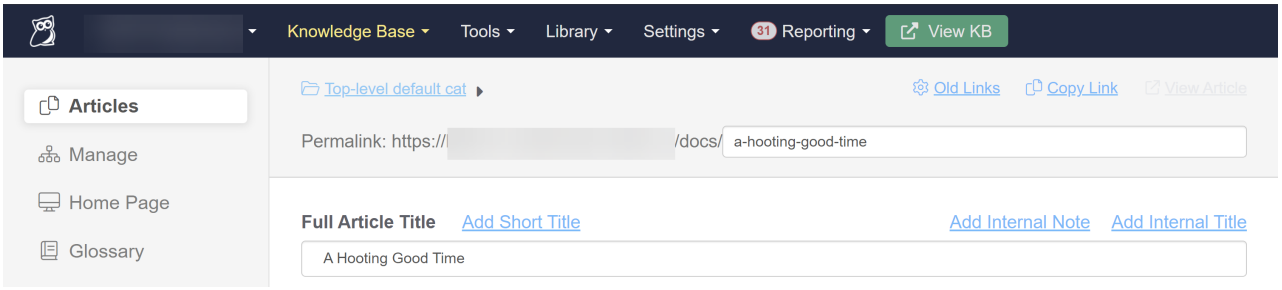
Old links to the rescue! Instead of trying to track down every instance of the original permalink for **Giving a**

hoot about knowledge, Linus can set **Giving a hoot about knowledge** to a deleted status and enter the giving-a-hoot url as an old link for **Docs or it didn't happen**. When people try to go to the giving-a-hoot URL, we'll auto-redirect them to docs-or-it-didnt-happen instead.

Updated permalink

In other cases, maybe Linus didn't write an entirely new article but, instead, he changed the title on an existing article and wants to change the permalink, too. Let's say Linus has an article whose permalink has always been this:

```
https://support.knowledgeowl.com/help/a-hooting-good-time
```

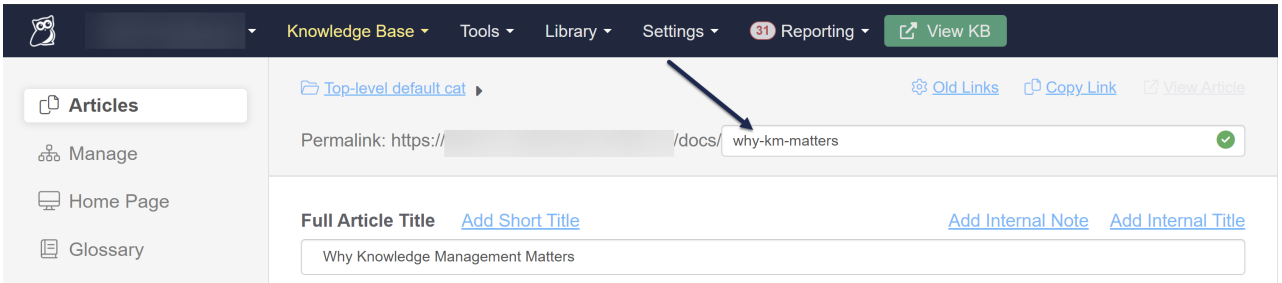


But that permalink was generated from the article's old title (A Hooting Good Time). When Linus updated this article to a new version, he renamed it to "Why Knowledge Management Matters." He wants to update the permalink to:

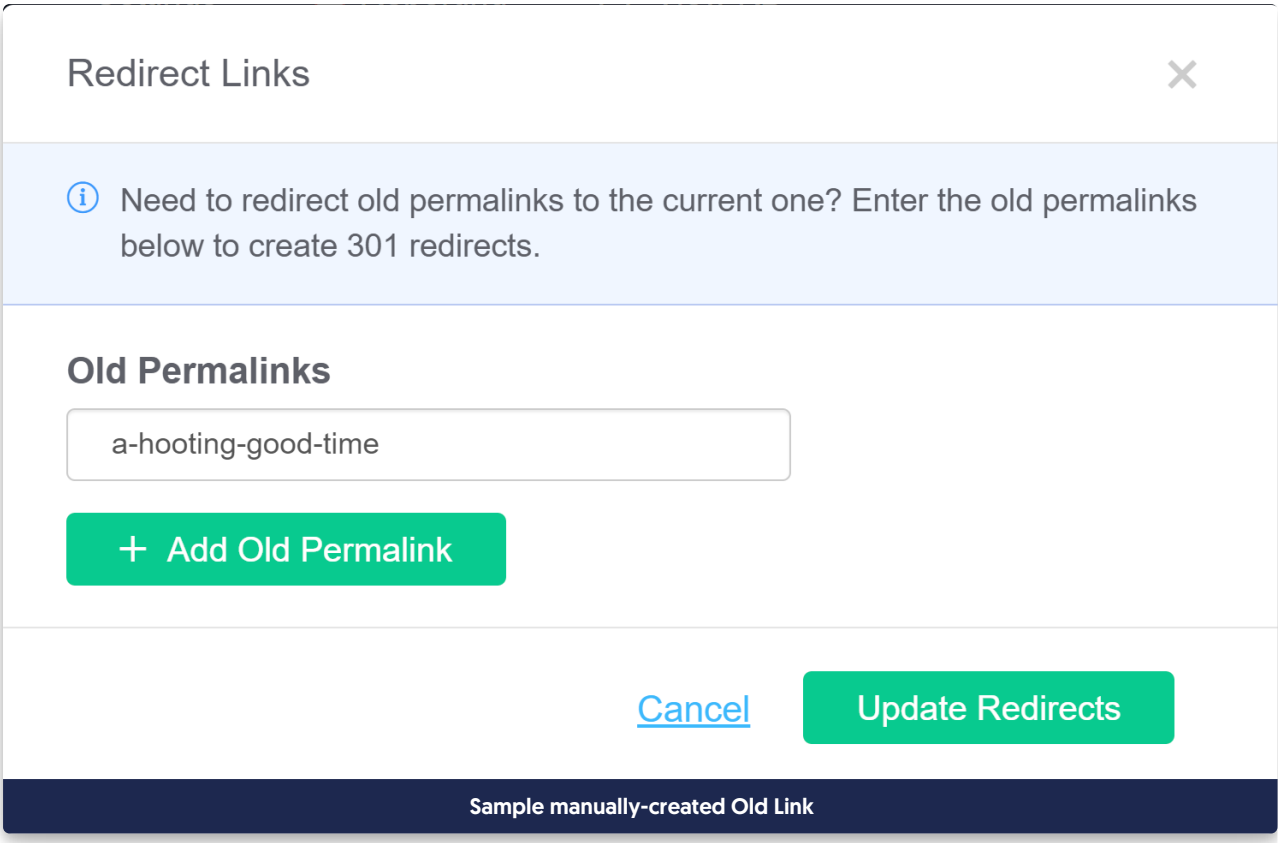
```
https://support.knowledgeowl.com/help/why-km-matters
```

But he also want any links or bookmarks to **a-hooting-good-time** to still work.

First, Linus can edit the current permalink to why-km-matters.



Then, he adds an old link to a-hooting-good-time so that the old URL will automatically redirect to why-km-matters:



Once Linus clicks Save Redirects and re-saves the article, anyone visiting

https://support.knowledgeowl.com/help/a-hooting-good-time

will be redirected to

https://support.knowledgeowl.com/help/why-km-matters

In a nutshell, old links are here to make it easier for you to keep older/public article permalinks but have them point to the most recent relevant content.

Note: this is exactly the workflow that the automatic permalink option in Settings > Basic handles for you!

Search phrases

Last Modified on 05/29/2024 5:28 pm EDT

Search phrases can help your readers discover your content.

When to use search phrases

Search phrases are useful in the following situations:

- You've configured your knowledge base search to weight search phrases to rank higher than other fields. This allows you to artificially boost an article up the search results list. Refer to Search weights for more information on configuring search weights. For example:
  You have three articles about taming owls: "Introduction to owl taming", "Best owl breeds for taming", and "Dangers of owl taming". The default search places "Dangers of owl taming" at the top of the results when readers search for "owl taming". You want your readers to start with the introduction (and not be scared off!) You can configure your search settings to favor search phrases, then add the phrase "owl taming" in the **Search Phrases** field in the "Introduction to owl taming" article.
- You want readers to find the article when they search for a phrase or term that doesn't occur in the content itself. However, you should consider using the Synonyms feature for this use case.

You don't need to use search phrases if you are happy with the order of search results, and the phrase is present in the title, permalink, body, or meta description fields.

Adding individual search phrases

1. Open the article for editing.
2. Type the term or phrase you want to use in the **Search Phrases** field.
3. Press `Enter` or `Tab` to add the phrase. You can now type another phrase, or save the article.

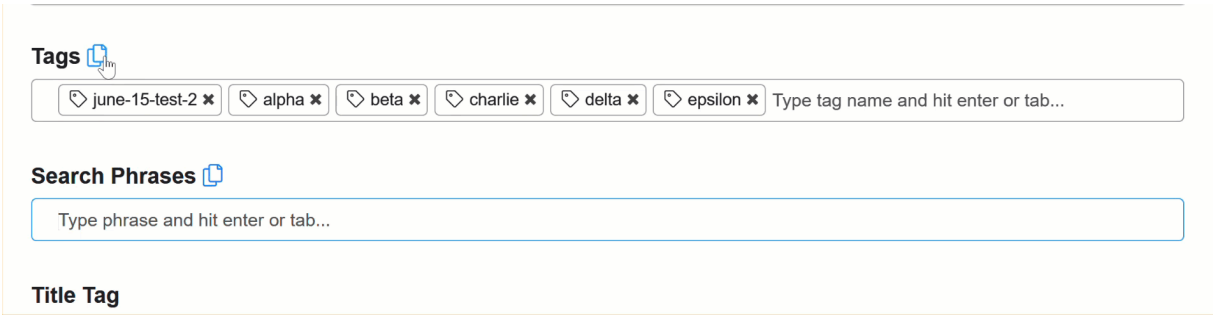


Adding multiple search phrases at once

You will need to have your search phrases in a comma-separated list, formatted like: phrase1,phrase

2,phrase3,phrase four.

1. Open the article for editing.
2. Paste your comma-separated list of searches in the **Search Phrases** field.
3. Press `Enter` or `Tab` to add the phrases. You can now type additional phrases, or save the article. Here, we're copying the tags field and pasting it into the search phrases field (this is not a best practice, but it does allow you to see the functionality!):



What is a version?

Last Modified on 10/10/2024 1:47 pm EDT

Your knowledge base content is subject to change. Perhaps your internal policies have been updated or the software you are documenting has undergone a major change to its interface.

You will need to update your knowledge base content and it can be really daunting to do those edits in the already published article.

You can create specific, distinct versions of an article or custom content category over time, to reflect changes to the content. Versions are basically a permanent snapshot you create of the article at a given time. Only one version of an article is published in your knowledge base at a time.

With versions, you can:

- Create different **Versions** of your articles (minor, major, or custom numbering).
- Make updates/edits in the new version rather than the currently published version.
- Activate the new version in place of your existing article once the version is ready to go.
- Add version notes for each version to summarize what has changed or provide editorial feedback. Only authors editing the content can see these.

Benefits of using versions

Last Modified on 10/10/2024 1:24 pm EDT

Some of the benefits of using versions include:

- New versions begin in an inactive status, so you can make as many edits as you want to that version instead of the currently published article. This means your readers never stumble across an in-progress edit.
- Versions allow you to create an updated article ahead of time and then publish the new version to coincide with a software release or policy update.
- Older versions can serve as back-ups and will allow you to easily reference historical content--particularly helpful if you accidentally removed a section you still need or need to provide an audit history of previous documentation versions.
- Unlike revisions, versions are stored for as long as you'd like them to be.
- You can add version notes to summarize changes that were made or track content reviews.
- You can create versions for both articles and custom content categories.

Use cases for versions

Last Modified on 05/29/2024 5:28 pm EDT

Generally, people use versions to:

- Keep an audit history of different versions of content used over time
- Provide version control for their documentation
- Match documentation updates to real-world updates (such as releases, etc.)
- Prepare updates for published content without having to instantly publish them

Do not use versions for:

- Tracking every tiny change to an article
- Tracking every person who's edited an article over time

For Version Control: When you create a new version, it takes a copy of the current active version to use as a starting point. Any edits you make to one version don't impact another.

For releasing updates to an already-published article when you choose: You can also wait to publish a new version until all editing and review is done--this can be a great way to prep documentation updates ahead of major company announcements, rebranding, product releases, a new school year, etc. without impacting the current published article.

For allowing a review of updates to a published article before they are published: Since you can also control which authors can create versions and who can publish them, versions can be a great way to allow folks to edit and update articles without giving them access to edit a currently-published article.



At this time, we do not have an automatic version comparison that will highlight the differences between versions, like we do for revisions. For now, you'd need to manually compare versions or have detailed Version Notes highlighting the differences.

Are revisions stored for versions?

Last Modified on 05/29/2024 5:27 pm EDT

Revisions are stored for all article versions created or edited after 12 April 2024.

As with regular articles, the Recent Revisions link will appear in the upper right of the editor once a version has been saved twice after its creation.



Prior to April 2024, we only stored revisions for the **current active version.** We began tracking revisions for all versions on 12 April 2024. Versions created or edited before 12 April 2024 do not get full revision tracking. For questions about revision history in older versions, see the Older versions section below.

Older versions

Versions created and last edited before 12 April 2024 do **not** get full revision history tracked.

For older versions, revisions are only tracked for **the currently active version.**

After a version is deactivated, it continues to hold the revisions it had from when it was activated (max of 10).

Let's look at an example to see how this plays out:

Linus has an article called "Learning to Fly" which he has published. By default, this has only one version: **Version 1.0**.

- Revisions for Version 1.0 are tracked, up to a maximum of 10.

Linus needs to make some updates, so he creates a new minor version, **Version 1.1**.

- Revisions for Version 1.0 will still be tracked, since it is still the current active version.
- Revisions for Version 1.1 will not be tracked because it isn't activated yet.

Linus continues to save changes to **Version 1.1** but has not yet activated it.

- Those changes will **not** be tracked as revisions, because Version 1.1 has not yet been activated.
- Any revisions to **Version 1.0** would continue to be tracked.

Linus activates **Version 1.1**.

- From activation onward, revisions for Version 1.1 will be tracked.
- No further revisions for Version 1.0 will be tracked.
- The historical record of the last 10 revisions for Version 1.0 will still appear if we view Version 1.0 in the editor; they will not appear when we view Version 1.1 in the editor.

Open and edit versions

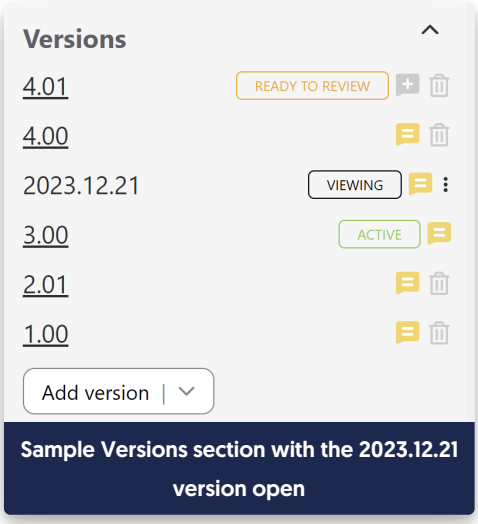
Last Modified on 10/02/2024 3:01 pm EDT

All authors with permission to view an article can view its versions and notes in the editor. Only authors with appropriate editing permissions can edit a version or update its version notes:

Authors with the default Editor or Writer role can edit article versions and custom content category versions, including adding Version notes and marking ready for review. If you're using a custom role:

- To edit article versions, you'll need the **Article** Permission to Edit versions of articles.
- To edit custom content category versions, you'll need the **Category** Permission to Edit categories.

All versions for an article are stored in the **Versions** section of the righthand panel of the article editor:

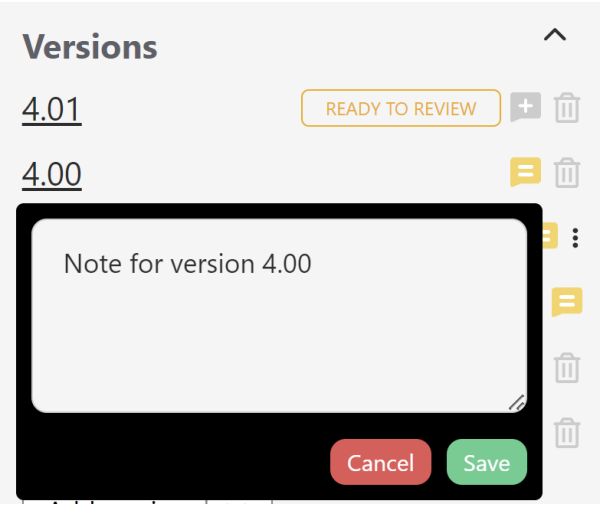


Sample Versions section with the 2023.12.21 version open

This section displays a list of all versions for a given article.

- The current active version is marked with a green Active badge to the right. (In the screenshot above, version 3.00 is the current active version visible in the knowledge base.)
- The version you're currently viewing has a black **Viewing badge** to the right, and the version's number won't be underlined. (In the screenshot above, version 2023.12.21 is currently open.)
- Any versions marked ready to review have an orange Ready To Review badge to the right.
- Select the hyperlink of another version to view that version.
- When viewing an inactive version, the triple dot Version actions menu allows you to mark/unmark the version as ready for review, activate it, or delete it.

View the version notes for any version by selecting the notes icon to the right of the version's number:



Once you've opened a version, make all your changes and save them just as you would a regular article or custom content category. No changes in non-active versions will be visible to your readers unless you activate that version.

Authors with custom roles without the permission to edit article versions will be able to view version notes, but will not be able to add, edit, or remove them.

Create a version

Last Modified on 10/10/2024 1:34 pm EDT

You can create versions in articles and in custom content categories.

> Authors with the default Editor or Writer role can create both article versions and custom content category versions. If you're using a custom role:
>
> - To create article versions, you'll need the **Article** Permission to Create new versions of articles.
> - To create custom content categories, you'll need the **Category** Permission to Edit categories.

To create a version for an article or custom content category:

1. Open the article or custom content category in the editor.
2. In the **Versions** section near the top of the righthand column, select **Add version**.

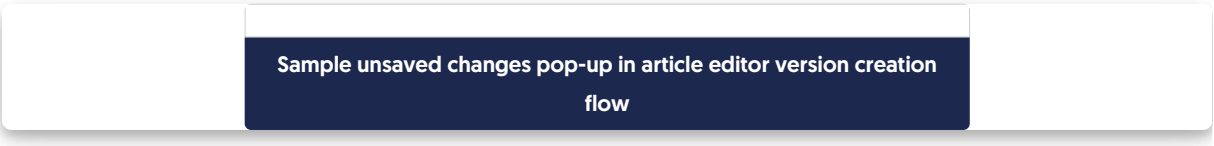


3. From the Add version dropdown, select the version numbering convention you'd like to use.
    a. **Minor (+0.01)** creates an automatically numbered major version from the current active version and any other minor versions. If you select this option, you'll immediately be taken to the next step.
        i. If you only have version 1.00, Minor creates a new version numbered 1.01.
        ii. If you have version 1.02, Minor creates a new version numbered 1.03.
    b. **Major (+1.0)** creates an automatically numbered major version from the current active version and any other major versions. If you select this option, you'll immediately be taken to the next step.
        i. If you only have version 1.00, Major creates a new version numbered 2.00.
        ii. If you have version 2.00, Major creates a new version numbered 3.00.
    c. **Custom** allows you to manually add your own version number. We like to use dates for ours! If you select this option, a text box appears. Enter your custom version number in the text box and select **Create**.



4. If you had no unsaved changes in the editor when you began creating your new version, the new version is created from the current **active** version and the editor will refresh to open to that new version.
5. If you had any unsaved changes in the editor when you began creating your new version, a modal opens

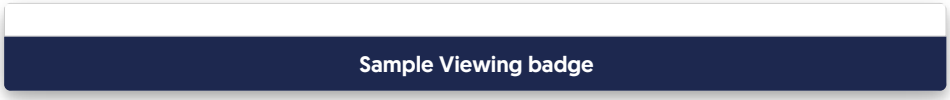
asking you how you'd like to proceed:



Sample unsaved changes pop-up in article editor version creation flow

6. You can choose to:
    a. **Save changes to the current version:** If you select this option and then **Create Version**, your edits in the current version will be saved before the new version is created. If you were editing the current active version, you'll see those edits reflected in both the current version and the newly-created version. (This option is selected by default.)
    b. **Discard changes to the current version:** If you select this option and then **Create Version**, your edits in the current version will be discarded.
    c. **Cancel:** This option will cancel the creation of the new version and return you to your unsaved changes in the editor. This can be a good option if you want to copy the current changes without saving them to the current version.
7. Once you make your selection and choose **Create Version**, the new version is created from the current **active** version and the editor will refresh to open to that new version.

You can tell which version you're currently viewing by looking for the black Viewing badge in the versions list:



Sample Viewing badge

With your new version created, you can begin making edits to that version.

You can toggle between different versions by selecting the version number. All versions are displayed in reverse chronological order with the most recent at the top. Versions with version notes have a yellow notes icon to the right; versions without notes have a yellow icon with a white plus sign. Select the icon to view the notes.

You can make as many changes to the new version as you'd like. They won't show until you activate this version.

Activate a version

Last Modified on 10/07/2024 9:13 pm EDT

When you're ready, activate a new version. The active version:

- Is the default version opened in the editor
- Is the version that readers will see if the article is currently published or when it is published
- Has the **Active** badge next to it in the versions list

> Authors with the default Editor or Writer role can activate article and custom content category versions. If you're using a custom role:
>
> - To activate article versions, you'll need the **Article** Permission to Activate versions of articles.
> - To active custom content category versions, you'll need the **Category** Permission to Edit categories.

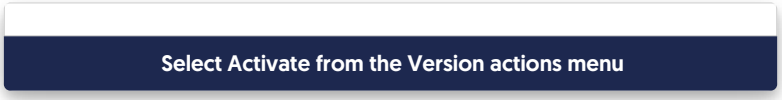
To activate a new version of an article:

1. Open the version of the article you'd like to activate.
2. In the **Versions** section of the righthand column, select the triple dot **Version actions** menu next to the version:



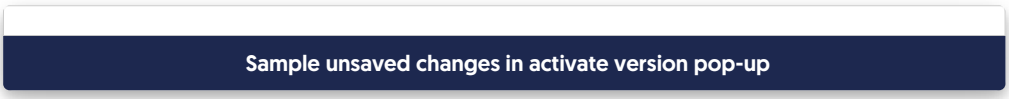
Version actions are located within the triple dot menu to the right of the version.

3. Select **Activate** from the Version actions dropdown.



Select Activate from the Version actions menu

4. If you had no unsaved changes in the version before you tried to activate, the version will automatically activate and the editor will refresh.
5. If you had unsaved changes in the version before you tried to activate, you may see a pop-up asking what you'd like to do with those changes:



Sample unsaved changes in activate version pop-up

6. You can choose to:
    a. **Save changes to the current version:** If you select this option and then **Activate Version**, your edits in the current version will be saved before the version is activated. The version will activate and the editor will refresh accordingly.
    b. **Discard changes to the current version:** If you select this option and then **Activate Version**, your edits in the current version will be discarded before the version is activated. (Generally this is not

the option you want, but who knows!) The version will activate and the editor will refresh accordingly.

c. **Cancel**: This option will cancel the version activation and return you to your unsaved changes in the editor. This can be a good option if you want to verify your changes before activating.

Congratulations, your version is now active and that content is what people will see in the live knowledge base when they view this article!



Activating versions for several articles at once
You can activate versions marked ready for review in multiple articles simultaneously using the Manage bulk edit function. Refer to Bulk activating "ready for review" versions for more information.

Delete a version

Last Modified on 10/07/2024 9:13 pm EDT

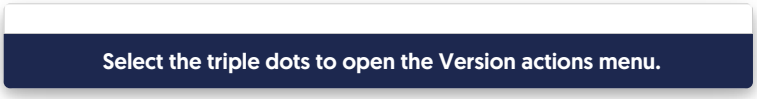
Have versions you don't need anymore? You can delete a version in two ways from within the editor.

Authors with the default Editor or Writer role can delete article and custom content category versions. If you're using a custom role:

- To delete article versions, you'll need the **Article** Permission to Delete versions of articles.
- To delete custom content category versions, you'll need the **Category** Permission to Edit categories.

If you're currently viewing the version you'd like to delete:

1. Select the triple dot **Version actions** menu to the right of the version in the **Versions** section.



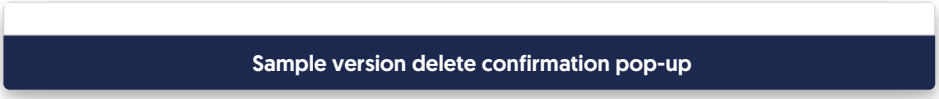
Select the triple dots to open the Version actions menu.

2. Select **Delete** from the Version actions dropdown.



Select Delete from the Version actions dropdown

3. A confirmation modal opens. Review the version number listed and be sure it's the version you want to delete. If it is, select **OK** to complete the deletion.

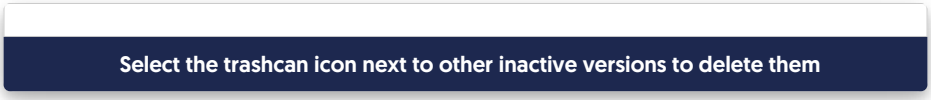


Sample version delete confirmation pop-up

4. Upon deletion, the editor will refresh and open the current active version.

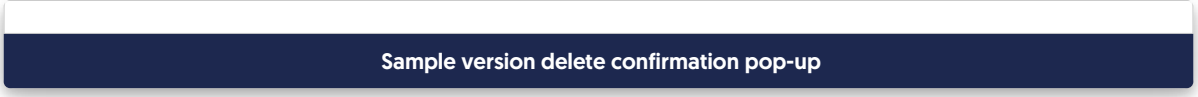
To delete a version when you aren't viewing it:

1. Select the trashcan icon to the right of another inactive version to delete:



Select the trashcan icon next to other inactive versions to delete them

2. A confirmation modal opens. Review the version number listed and be sure it's the version you want to delete. If it is, select **OK** to complete the deletion.



Sample version delete confirmation pop-up

3. The editor won't refresh, but the deleted version will disappear from the list.

What are version notes?

Last Modified on 10/10/2024 1:55 pm EDT

For each version of an article, you can add Version Notes.

Version Notes give you a free-form text field you can use to communicate author-only notes about the versions.

Use them for things like:

- Summarize the changes you made in this version from the current active version.
- Add notes about the content owner or subject matter expert you consulted.
- Provide editorial feedback to other authors.

In the Versions list, versions without any notes will have a yellow icon with a plus sign to the right of them.

Versions that have notes will have a similar icon with two lines in it.

For example, in the screenshot below, version 1.00 doesn't have version notes, but all the other versions do:



View version notes

Last Modified on 10/10/2024 1:58 pm EDT

To view a version note, select the notes icon next to the version number. The note displays in a modal below the selected icon:

Authors with custom roles that don't have permission to edit article versions can view version notes, but they cannot add, edit, or remove them:

Sample Version notes when author doesn't have permission to edit versions. Note they can only Close the note.

The icons for these authors will show dark grey instead of yellow:

Sample Versions section for author who doesn't have permission to edit versions

Edit version notes

Last Modified on 10/10/2024 2:17 pm EDT

Authors with the default Editor or Writer role can add, edit, and delete version notes. If you're using a custom role, you'll need to have:

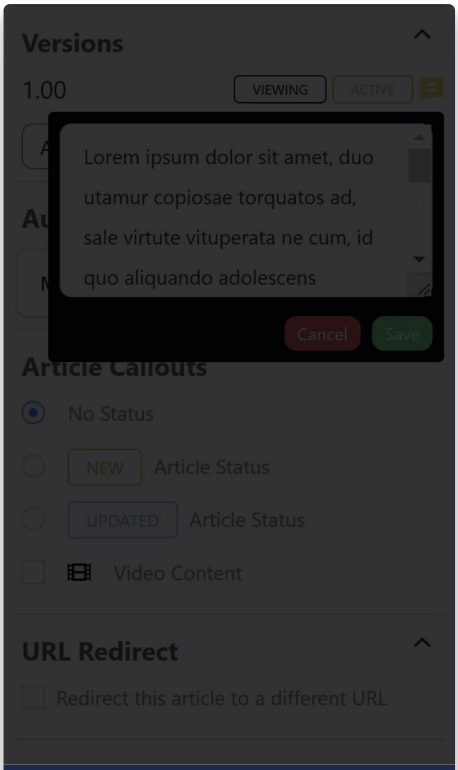
- For article versions: The **Article** Permission to Edit versions of articles. Authors with custom roles without this permission will be able to view version notes only.
- For custom content category permissions: The **Category** Permission to Edit categories. Authors with custom roles without this permission won't be able to open custom content categories in the editor.

To add, edit, or remove a version note:

1. Select the notes icon to the right of the version number. Versions with existing notes display two lines in the icon. Versions without existing notes display a plus sign in the icon:
2. Make your edits in the text box itself. To remove a version note, delete all the text.
3. Select **Save** to save your changes.
4. Select **Cancel** to close the note without saving your changes.
5. You can also select anywhere outside of the note to close the note box if you haven't made any edits.

The text field can hold a large amount of text. If more text is available, a scrollbar appears.

Use the scrollbar or drag the lower right corner to view additional text:



Version Note scrolling and window resize

Authors with custom roles that don't have permission to edit article versions can view version notes, but they'll only have the option to Close version notes instead of being able to Save them:

Sample Version notes when author doesn't have permission to edit versions. Note they can only Close the note.

Article in-app version review process

Last Modified on 10/10/2024 1:46 pm EDT

If you'd like other KnowledgeOwl authors with access to the editor to review your version, you can use a two-step workflow:

1. Editing authors open the version and **Mark for Review**. This adds the Ready to Review badge to the version.
2. Reviewing authors can use a Manage Articles filter to view a list of articles with versions ready for review, open them, and provide feedback or activate them.

Custom content categoryversions
While you can use this process with Custom content categories, those categories do not show up in Manage, so you'll need to handle the workflow in some other way. Refer to In-app version review process, custom content categories for instructions specific to custom content categories.

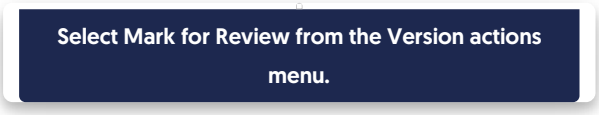
Mark article version as Ready to Review

Authors with the default Editor or Writer role can mark article and custom category versions for review. If you're using a custom role, you'll need to have:

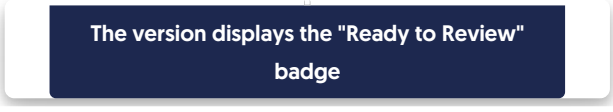
- For article versions: The **Article** Permission to Edit versions of articles.
- For custom content category versions: The **Category** Permission to Edit categories.

When a version is ready to be reviewed:

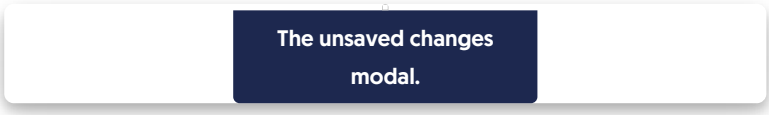
1. Be sure you have the correct version open in the editor.
2. Select the triple dot **Version actions** menu.
3. Select the **Mark for Review** option from the Version actions menu.



4. If you had no unsaved changes in the version before you tried to activate, the version will be marked as ready for review and the editor will refresh:



5. If you have unsaved changes in the version you're marking ready for review, a modal opens asking you what you'd like to do with those changes:



6. You can choose to:

    a. **Save changes to the current version:** If you select this option and then **Mark Version for Review**, your edits in the current version will be saved and the version will be marked Ready to Review. The editor will refresh to display that change.

    b. **Discard changes to the current version:** If you select this option and then **Mark Version for Review**, your edits in the current version will be discarded. The editor will refresh and mark the version as Ready to Review.

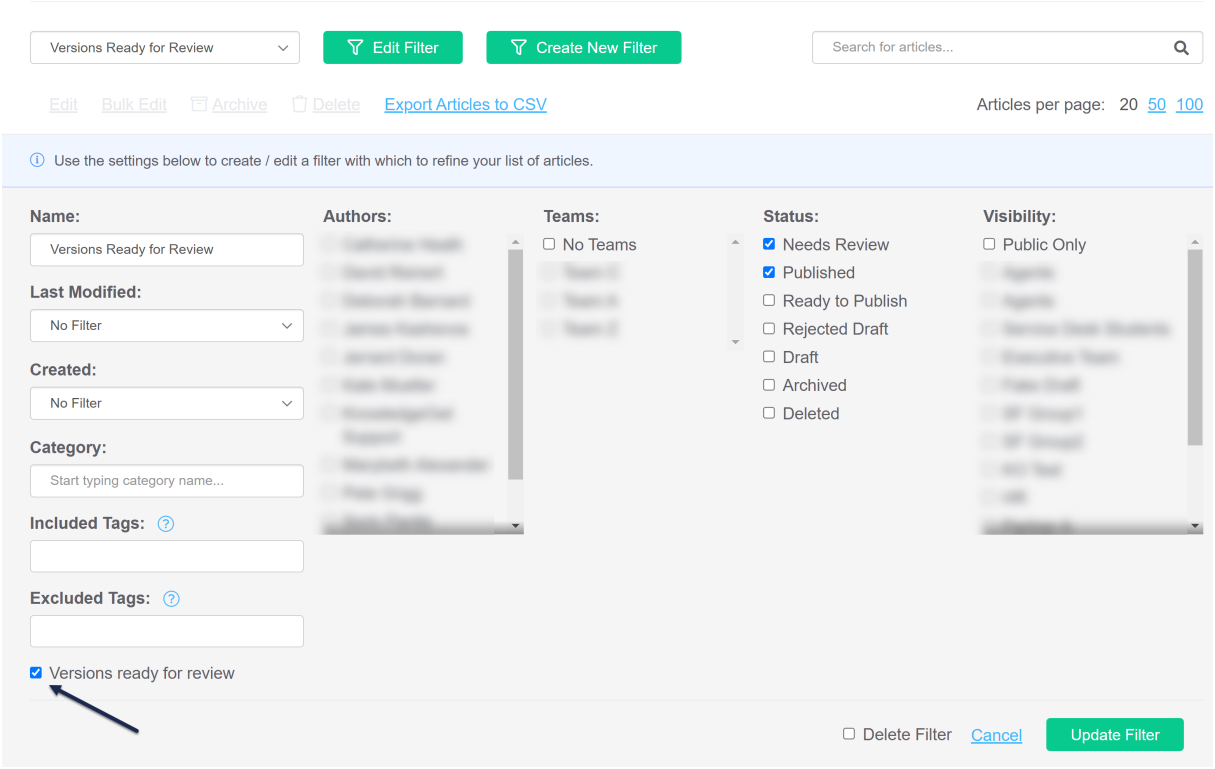
    c. **Cancel:** This option will cancel the version ready for review and return you to your unsaved changes in the editor. This can be a good option if you want to verify your changes before proceeding.

Use Manage filter to view a list of versions ready for review

Reviewing authors can then view a list of articles ready for review:

1. In the left menu, select **Manage**.

2. Create a custom Manage filter with the **Versions ready for review** checkbox checked. You can use any combination of other filters (such as date, author, etc.). For example, this filter will pull all articles with versions ready for review that have a Published or Needs Review publishing status:



3. Save your filter to view the list.
4. You can also export the Manage Articles filter output to CSV--articles with versions ready for review will show TRUE in the "New Version Ready to Publish" column.

Reviewing authors can add feedback in the Version Notes field, make edits themselves, or activate the version.

Have multiple versions ready for review that you'd like to activate? You can activate versions marked Ready for review in bulk using the Manage articles bulk editing interface and this same filter!

Version review process for readers

Last Modified on 06/12/2024 4:09 pm EDT

While the in-app version review process can work well if all of your reviewers are also KnowledgeOwl authors, it's quite possible you have reviewers or subject matter experts who don't have author accounts in KnowledgeOwl.

Or you might want reviewers to be able to see that version they're reviewing live in the full knowledge base, so they can see how it will look to your readers.

This is what the **Make Visible to Groups** option is for: it allows you to publish a new version of an article or custom content category to only specific reader groups accessing your knowledge base, so they can view that version as it will appear when it's fully activated.

> Authors with the default Editor or Writer role can make categories and articles visible to groups. If you're using a custom role, you'll need to have the **Article** Permission to Edit versions of articles to **Make Visible to Groups** (or the **Category** Permission to Edit categories, for custom content category versions.)

How it works

The Make Visible to Groups section only appears in the editor when you're viewing an inactive version of:

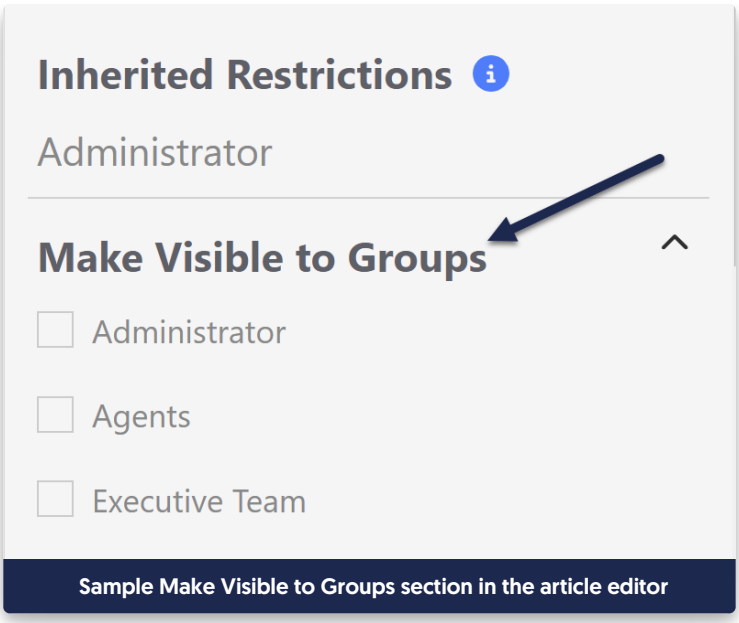
- An article with a Published or Needs Review publishing status
- A custom content category

Draft articles will not show a Make Visible to Groups option.

When it's visible, the Make Visible to Groups section appears in the righthand panel of the editor:

- In the article editor, this section displays between Inherited Restrictions and Restrict to Groups/Add More Restrictions.
- In the custom content category editor, it displays between the In Category section and the Inherited Restrictions section.

The Make Visible to Groups section shows all the reader groups available in your knowledge base:



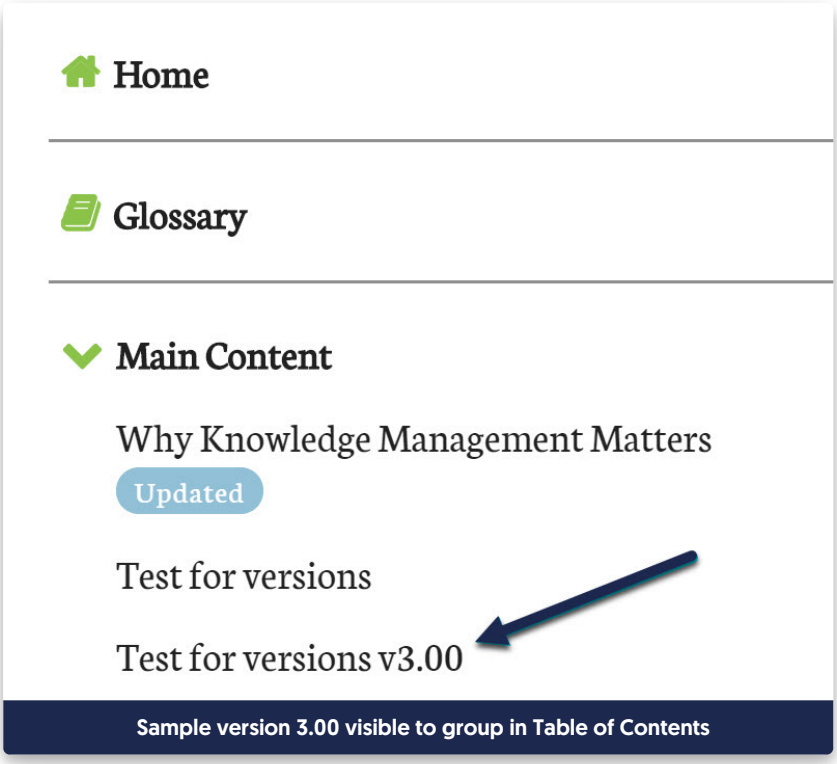
Sample Make Visible to Groups section in the article editor

To share the article or custom content category version with members of those groups:

1. Check the boxes next to the groups you'd like to make this version visible to.
2. **Save** your changes.

When you check one of the boxes next to a group in the **Make Visible to Groups** section and save, this article version becomes available in your knowledge base to those groups:

1. In the Table of Contents, under the currently published version, with the version number added to the end of the title. For example:

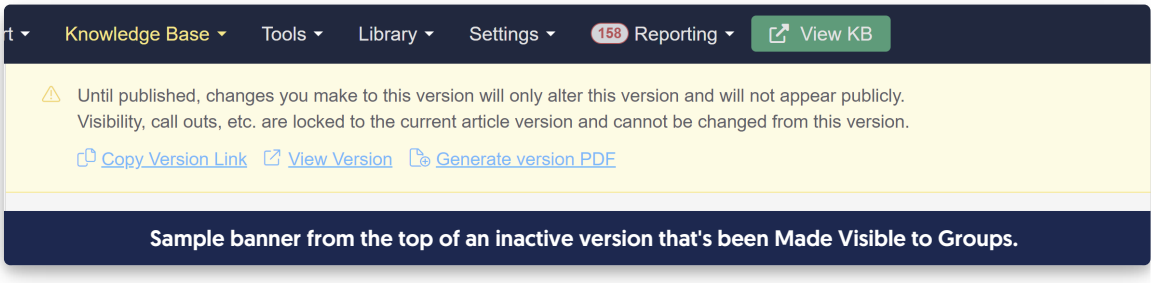


Sample version 3.00 visible to group in Table of Contents

2. Via direct URL link. Once you add one or more groups in **Make Visible to Groups** and save, you'll see hyperlinks in the message at the top of the version editor that will allow you to:

a. **Copy Version Link:** copies the URL for this particular version to your clipboard, so you can paste it somewhere else (like an email, a note, etc.)

b. **View Version:** Will open the knowledge base to this version in a new tab (basically the same place you'd get to by clicking the link in the Table of Contents screenshot above).



Sample banner from the top of an inactive version that's been Made Visible to Groups.

This version will only be accessible by readers in the groups you select in **Make Visible to Groups.**

Once you activate this version, the **Make Visible to Groups** section disappears entirely and the regular **Restrict to Groups** permissions apply.

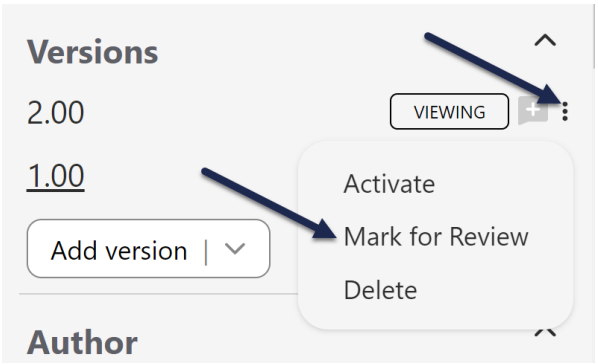
In-app version review process, custom content categories

Last Modified on 10/10/2024 1:27 pm EDT

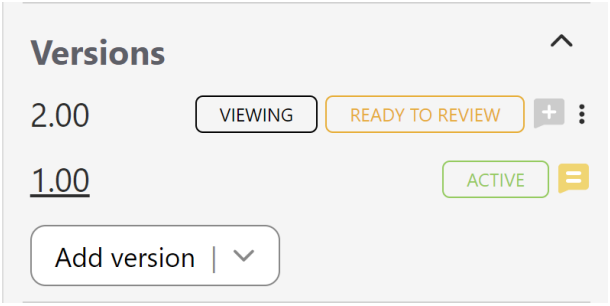
If you'd like other KnowledgeOwl authors with access to the editor to review your custom content category version, you can mark versions as **Ready** for review. Since custom content categories do not show up in Manage, though, you'll need to figure out some other workflow for notifying other authors that the category's version is ready for review.

To mark a custom content category version as ready for review:

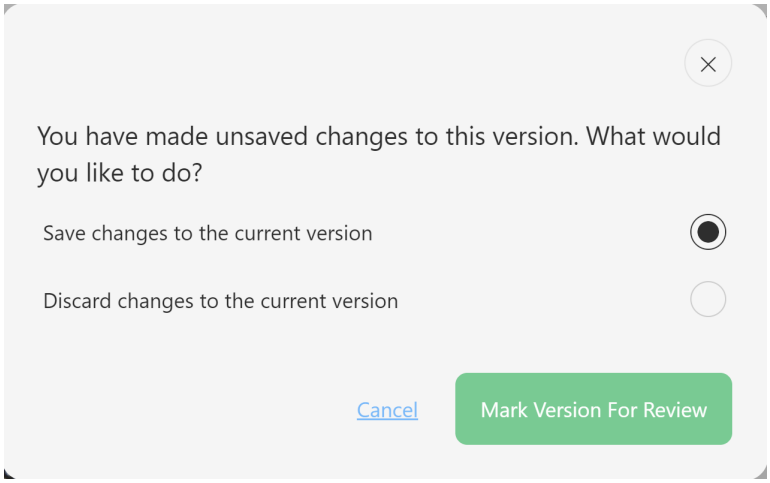
1. Be sure you have the correct version open in the category editor.
2. Select the triple dot **Version actions** menu.
3. Select the **Mark for review** option from the Version actions menu.



4. If you had no unsaved changes in the version before you tried to activate, the version will be marked as ready for review and the editor will refresh:



5. If you have unsaved changes in the version you're marking ready for review, you'll see a pop-up asking you what you'd like to do with those changes:



6. **You can choose to:**
    a. **Save changes to the current version: If you select this option and then Mark Version for Review, your edits in the current version will be saved and the version will be marked Ready to Review. The editor will refresh to display that change.**
    b. **Discard changes to the current version: If you select this option and then Mark Version for Review, your edits in the current version will be discarded. The editor will refresh and mark the version as Ready to Review.**
    c. **Cancel: This option will cancel the version ready for review and return you to your unsaved changes in the editor. This can be a good option if you want to verify your changes before proceeding.**

Reviewing authors can add feedback in the Version Notes field, make edits themselves, or activate the version.

Generate a version PDF

Last Modified on 06/12/2024 2:46 pm EDT

PDFs for the current live article are generated and updated automatically when you publish an article or save changes to a published article.

But what about versions?

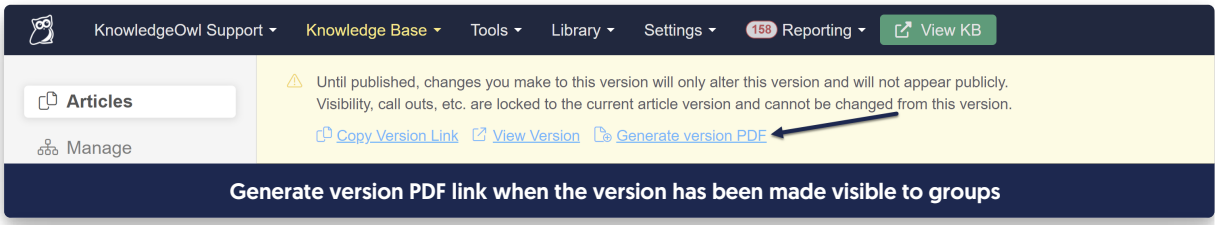
If you make a version visible to groups, the PDF icon isn't visible when a member of that group views the version.

Instead, you can generate a PDF of a version from within the article editor.

This PDF is available for 24 hours from the moment you activate it, or until you save changes to the version. You are welcome to download and save it, share that download with anyone else who might not have access to KnowledgeOwl, or just use it as a record of what a version looked like at a given time.

To generate a PDF of an inactive version:

1. Open the article for editing.
2. Open the inactive version you'd like to generate a PDF of.
3. When viewing an inactive version, there's a warning across the top letting you know it's a version. Within that warning, you may see several different links depending on whether this version has been made visible to groups or not.
4. Click the **Generate version PDF** link to generate the PDF. You can navigate away while it generates, if you'd like.



Generate version PDF link when the version has been made visible to groups



Generate version PDF link when the version has not been made visible to groups

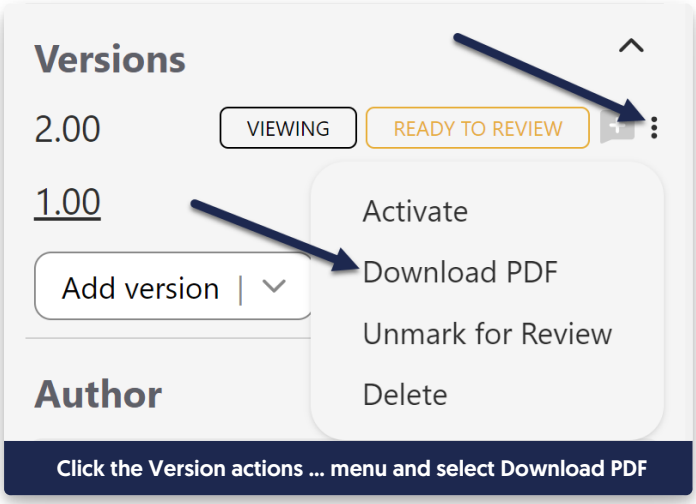
5. Once the PDF is generated, the link in the warning will update to read **Download version PDF**. You can click that link to download the version PDF that was just generated.



Download version PDF link in the banner

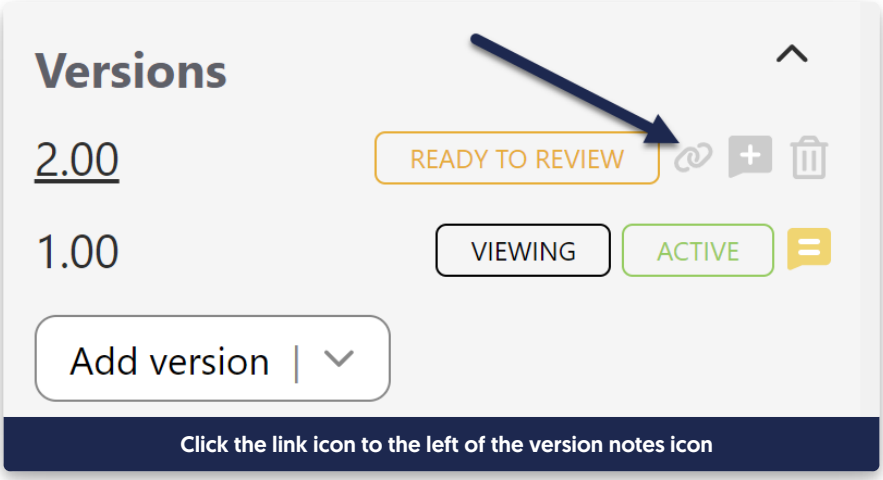
6. Once PDFs are generated, they can also be accessed through the article editor's righthand column. (Note: these options won't exist if you've kept this page open through the entire PDF generation; you may need to refresh the page to see them!)

7. To download a PDF of the version you're currently viewing, click the Version actions triple dot menu to the right and select Download PDF:



Click the Version actions ... menu and select Download PDF

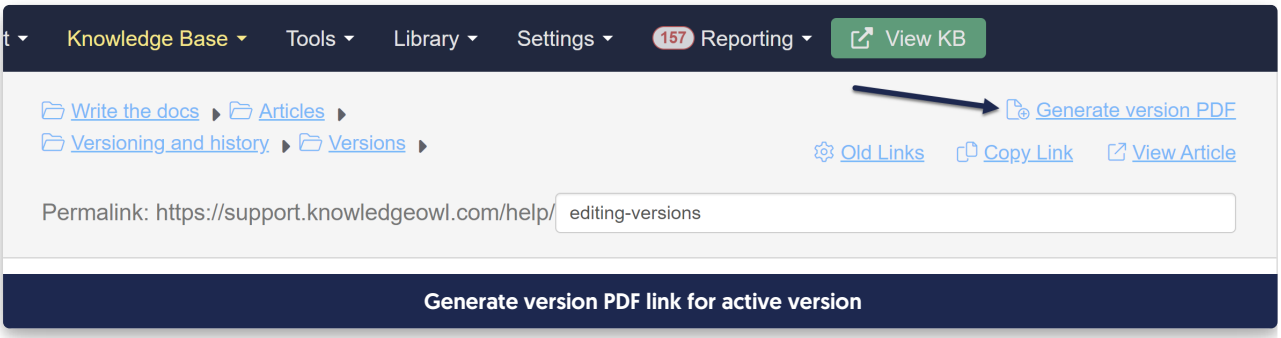
8. To download the version PDF for a version you aren't currently viewing, click the link icon to the right of the version in the Versions list:



Click the link icon to the left of the version notes icon

Once a version PDF has been generated, it is available until any changes to the version are saved. Once you make any edits and save, the link will switch back to "Generate version PDF". If no changes are made, the PDF will remain available for download for 24 hours from when you first generated it. You can regenerate a new version PDF after that window has passed if you need it again!

You can also generate a version PDF of the current active version of any published article from the editor by clicking the **Generate version PDF** link near the upper right of the main editor pane:



Generate version PDF link for active version

As with the inactive version PDF, the link will update to **Download version PDF** once the PDF has been generated. Active versions don't get the triple dot Version actions menu, so you can only download the version PDF from the main pane if you have this version open.

Alternatively, you can open any other version to see the version PDF link in the Versions list and download by clicking that:



Sample Version PDF link for active version when viewing another version

Active version PDFs generated this way will use the Article Version layout, not the Article layout.

Change the version PDFs' format or text

Last Modified on 05/29/2024 5:27 pm EDT

Version PDFs will use whatever header or footer you've set up in **Settings > PDFs**. Since they can contain very different metadata from a standard article, the metadata that is available and the format for these PDFs is controlled through a Custom HTML template in **Settings > Style**: Article Version.

The default layout looks a bit like this (sample values are in *italics*):

> ## Sample article title
>
> Version Number *1.01*
> Version Author *Linus Owl*
> Version Creation Date *10/05/2023 12:32pm EDT*
> Version Activation Date *10/08/2023 1:01pm EDT*
> Author Activating *Barn Owl*
> Version Deactivation Date *10/10/2023 3:04pm EDT*
> Author Deactivating *Linus Owl*
>
> Sample article body

You have a lot of control over what this looks like, so if you want to make changes, you can!



Versions created, activated, or deactivated before 11 October 2023 will not have most of these metadata fields properly populated, since the fields didn't exist before this date. If you'd like to retroactively add in dates for versions that pre-date these changes, you can use an API PUT call for the version to update them. Contact us for help!

Update the text labels

To change the text labels, like "Version Number" or "Version Author", edit the default text strings in the **Article** section of the Customize Text tool. See Section breakdown: Article for more details on the available strings and what they adjust.

Update the format or layout

The format and structure for version PDFs is set using the HTML format laid out in the Default Article Version HTML template in **Settings > Style**. You can edit that template to:

- Change the order of the metadata fields
- Remove any metadata fields entirely
- Update the layout of that metadata section

If you're looking to make a specific change and you're not sure how to do it, please contact us for help! We'll

be building out examples of changes you can make based on where people seem to struggle the most. ☺

What is a revision?

Last Modified on 05/29/2024 5:28 pm EDT

After you've created an article or version and saved it for the first time, a revision is automatically logged every time you save an article with some type of change and click the **Save** button. This means that each revision could be something as small as a corrected typo or changed punctuation mark, or as big as replacing all text of the article. Recent Revisions capture changes to the article and version's text **only**. So if you just replaced one screenshot for another, that won't be captured.

Revisions are basically the most recent save log. We automatically save up to ten (10) recent revisions. Once you have saved more than ten times, we'll automatically delete the older revisions to maintain a maximum of ten.



If you're using shared content articles, all revisions for both child and parent article are stored and displayed at the parent article. The child article has no revision history of its own.

Use cases for revisions

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Think of revisions as a snapshot of the most recent changes to an article, and an "oh no what have I done?" protection if you've recently made changes and messed something up.

Generally, people use revisions to:

- See who's edited the article recently, and how substantive those edits were
- Recover a recent revision of the article when something's gone wrong (someone accidentally deleted things or misunderstood what edits to make, etc.)

Do not use revisions for:

- Long-term auditing/tracking of content changes
- Permanent record of content to be able to revert/show what the content was at a specific point in time (such as for a compliance audit, etc.)

View revisions and revision history

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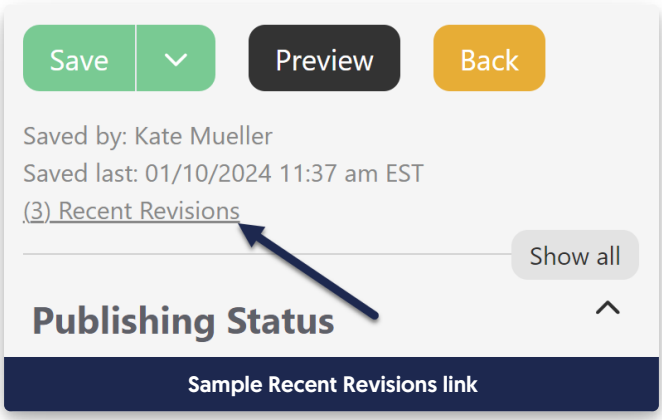
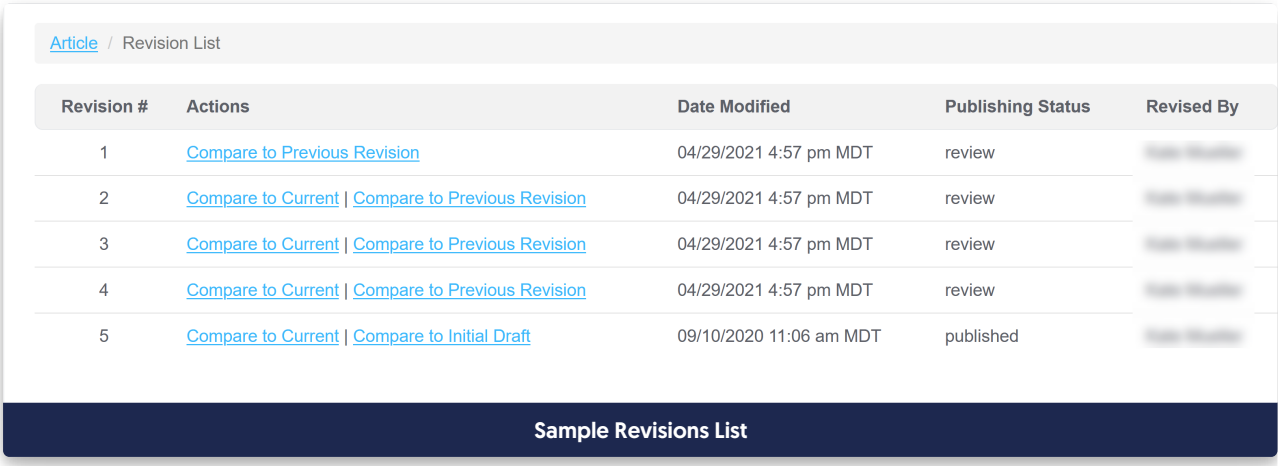
You can see when revisions have been stored by looking just under the Save, Preview, and Back buttons. If revisions have been stored, you'll see a Recent Revisions hyperlink with the number of revisions in parentheses:



Sample Recent Revisions link

Click that link to view a list of your recent revisions:



Article / Revision List

Revision #	Actions	Date Modified	Publishing Status	Revised By
1	Compare to Previous Revision	04/29/2021 4:57 pm MDT	review	[redacted]
2	Compare to Current | Compare to Previous Revision	04/29/2021 4:57 pm MDT	review	[redacted]
3	Compare to Current | Compare to Previous Revision	04/29/2021 4:57 pm MDT	review	[redacted]
4	Compare to Current | Compare to Previous Revision	04/29/2021 4:57 pm MDT	review	[redacted]
5	Compare to Current | Compare to Initial Draft	09/10/2020 11:06 am MDT	published	[redacted]

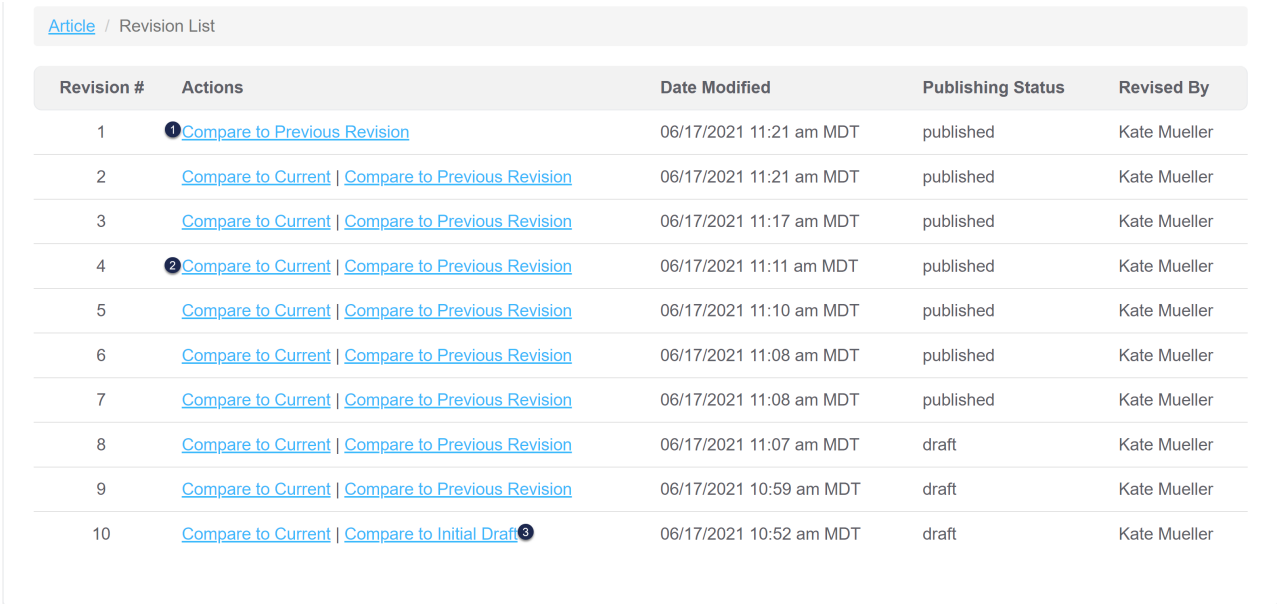
Sample Revisions List

The most recent revision will be at the top, as Revision #1.

Compare revisions

Last Modified on 05/29/2024 5:27 pm EDT

Once you've opened the revision history list, you can compare revisions to see what changed. The most recent revision will be at the top, as Revision #1. It will only give you the option to Compare to Previous Revision. The oldest revision will be at the bottom.



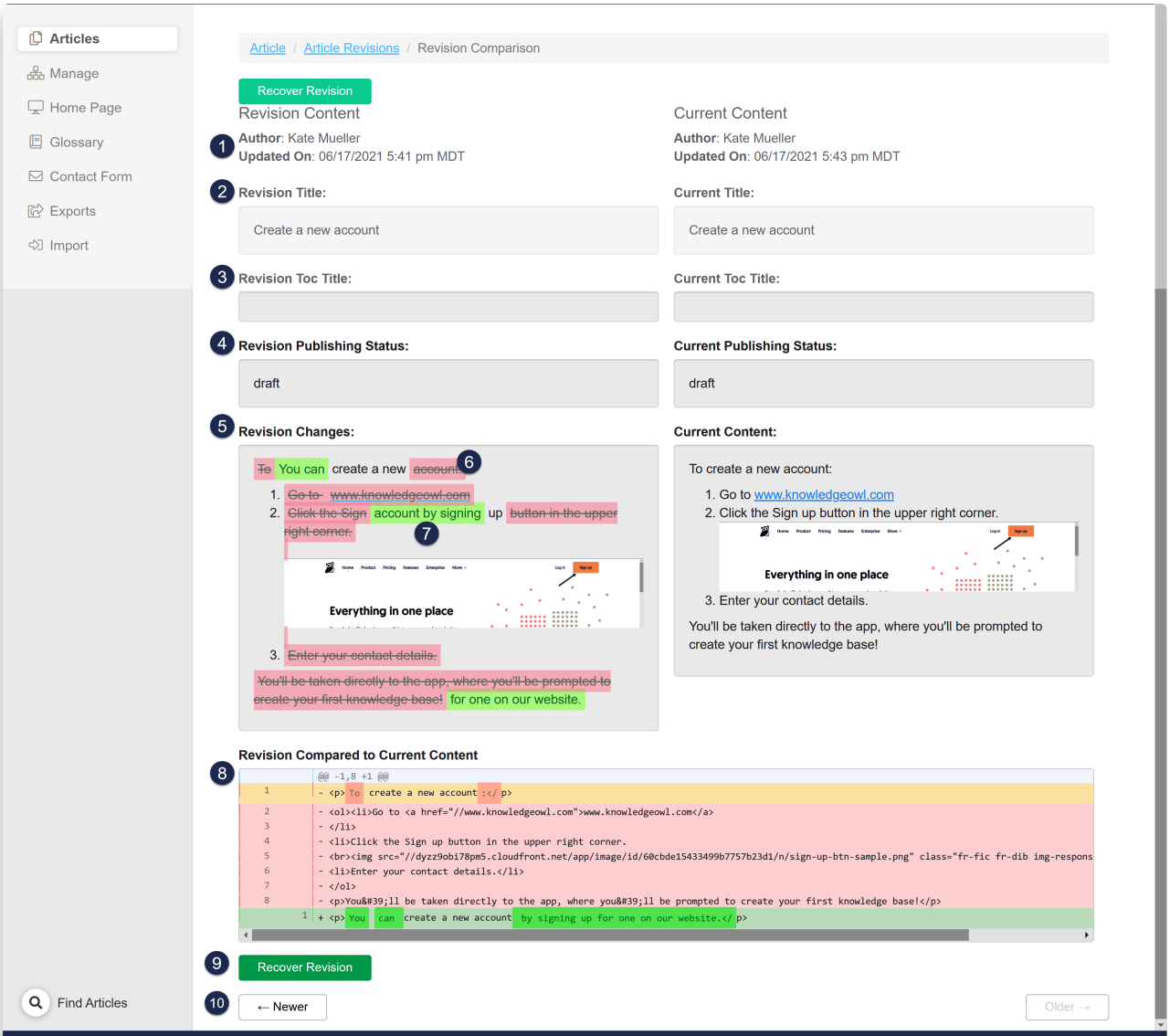
Article / Revision List

Revision #	Actions	Date Modified	Publishing Status	Revised By
1	1 Compare to Previous Revision	06/17/2021 11:21 am MDT	published	Kate Mueller
2	Compare to Current | Compare to Previous Revision	06/17/2021 11:21 am MDT	published	Kate Mueller
3	Compare to Current | Compare to Previous Revision	06/17/2021 11:17 am MDT	published	Kate Mueller
4	2 Compare to Current | Compare to Previous Revision	06/17/2021 11:11 am MDT	published	Kate Mueller
5	Compare to Current | Compare to Previous Revision	06/17/2021 11:10 am MDT	published	Kate Mueller
6	Compare to Current | Compare to Previous Revision	06/17/2021 11:08 am MDT	published	Kate Mueller
7	Compare to Current | Compare to Previous Revision	06/17/2021 11:08 am MDT	published	Kate Mueller
8	Compare to Current | Compare to Previous Revision	06/17/2021 11:07 am MDT	draft	Kate Mueller
9	Compare to Current | Compare to Previous Revision	06/17/2021 10:59 am MDT	draft	Kate Mueller
10	Compare to Current | Compare to Initial Draft 3	06/17/2021 10:52 am MDT	draft	Kate Mueller

Here you'll see a few different links to begin comparisons:

1. **Compare to Previous Revision**: This will compare the revision to the revision immediately below it in the list. So if I click the link at #1 in the screenshot, that will compare Revision #1 with Revision #2.
2. **Compare to Current**: This will compare the revision to Revision #1, the current revision. So if I click the link at #2 in the screenshot, that will compare Revision #4 with Revision #1.
3. **Compare to Initial Draft**: You'll only see this option If you have fewer than 10 total revisions. This will allow you to view the first content save for the article.

Clicking on one of those comparisons will open a new screen that will do a side-by-side comparison:



A sample Revision Comparison

The exact display will depend on which compare option you chose. The screenshot above is the Compare to Current, which shows the current content on the right.

1. The **Content** section will show the Author listed at the time of save, as well as the date + timestamp of the revision's save.
2. The **Title** lets you compare the article's main title between the two revisions.
3. The **Toc Title** lets you compare the article's Internal Title (if there was one) between the two revisions.
4. The **Publishing Status** lets you compare the article's publishing status.

> Note: you won't see a publishing status for revisions saved prior to 15 July 2020.

5. The **Content Changes** section lets you compare the article's text between the two revisions.
6. Any deletions will be in grey font and strikethrough: ~~grey font and strikethrough~~.

    - Deleted images will have a single space highlight on the line above or below them.

7. Any additions in a revision will be in green font and underlined: green font and underlined.
    - Added images will have a single space highlight on the line above or below them.

8. The **Revision Compared to Current Content** will provide a single-pane HTML comparison, with similar highlighting, so you can see the exact HTML differences.

9. You can revert to this revision by using the Recover Revision button.

10. Use the Newer and Older buttons to cycle through revisions without returning to the Revision List.

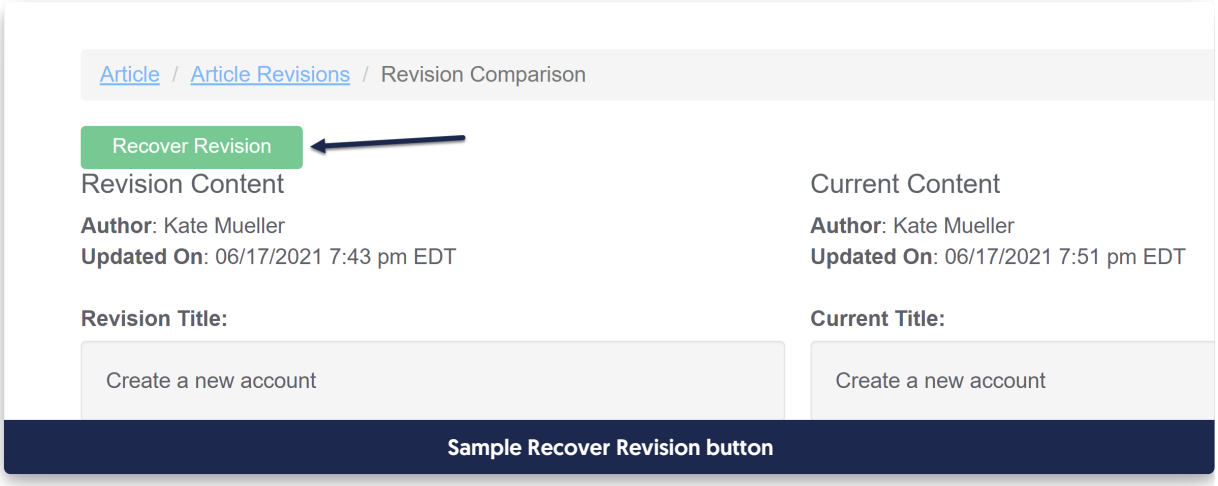
Recover a revision

Last Modified on 05/29/2024 5:28 pm EDT

Remember: we only save the 10 most recent revisions for an article; you cannot recover a revision older than that!

To recover a revision:

1. **Follow the steps outlined above to open the revision history and compare your current revision with the revision you'd like to recover.**
2. **Select the Recover Revision button above or below the revision you'd like to recover.**



Sample Recover Revision button

3. **This will kick you back to the article editor, with the contents of that revision in the editor for your review. You can confirm it's what you want or even make additional changes.**
4. **To finish recovering the revision, you must Save the article.**

Delete a revision

Last Modified on 05/29/2024 5:28 pm EDT

KnowledgeOwl automatically removes the oldest revision once you save more than 10 revisions for a given article. You cannot and do not need to delete revisions.

Are revisions stored for versions?

Last Modified on 05/29/2024 5:27 pm EDT

Revisions are stored for all article versions created or edited after 12 April 2024.

As with regular articles, the Recent Revisions link will appear in the upper right of the editor once a version has been saved twice after its creation.



Prior to April 2024, we only stored revisions for the **current active version**. We began tracking revisions for all versions on 12 April 2024. Versions created or edited before 12 April 2024 do not get full revision tracking. For questions about revision history in older versions, see the Older versions section below.

Older versions

Versions created and last edited before 12 April 2024 do **not** get full revision history tracked.

For older versions, revisions are only tracked for **the currently active version**.

After a version is deactivated, it continues to hold the revisions it had from when it was activated (max of 10).

Let's look at an example to see how this plays out:

Linus has an article called "Learning to Fly" which he has published. By default, this has only one version: **Version 1.0**.

- Revisions for Version 1.0 are tracked, up to a maximum of 10.

Linus needs to make some updates, so he creates a new minor version, **Version 1.1**.

- Revisions for Version 1.0 will still be tracked, since it is still the current active version.
- Revisions for Version 1.1 will not be tracked because it isn't activated yet.

Linus continues to save changes to **Version 1.1** but has not yet activated it.

- Those changes will **not** be tracked as revisions, because Version 1.1 has not yet been activated.
- Any revisions to **Version 1.0** would continue to be tracked.

Linus activates **Version 1.1**.

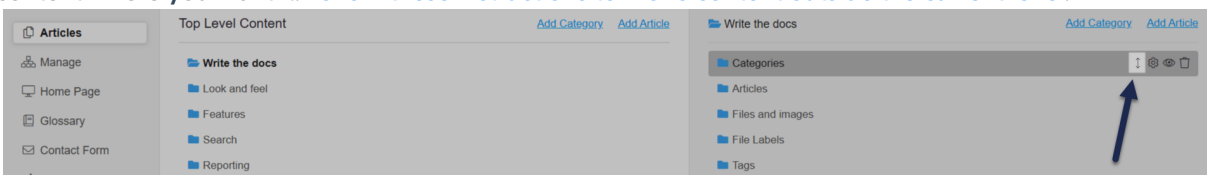
- From activation onward, revisions for Version 1.1 will be tracked.
- No further revisions for Version 1.0 will be tracked.
- The historical record of the last 10 revisions for Version 1.0 will still appear if we view Version 1.0 in the editor; they will not appear when we view Version 1.1 in the editor.

Reorder articles

Last Modified on 05/29/2024 5:28 pm EDT

Reorder categories or articles by rearranging their order in **Knowledge Base > Articles.**

1. Hover over the article or category you want to move.
2. Click on the up and down arrow icon to the right of each category or article, and drag and drop the content where you want it. Follow these instructions to move content outside the current level.



Move articles between levels

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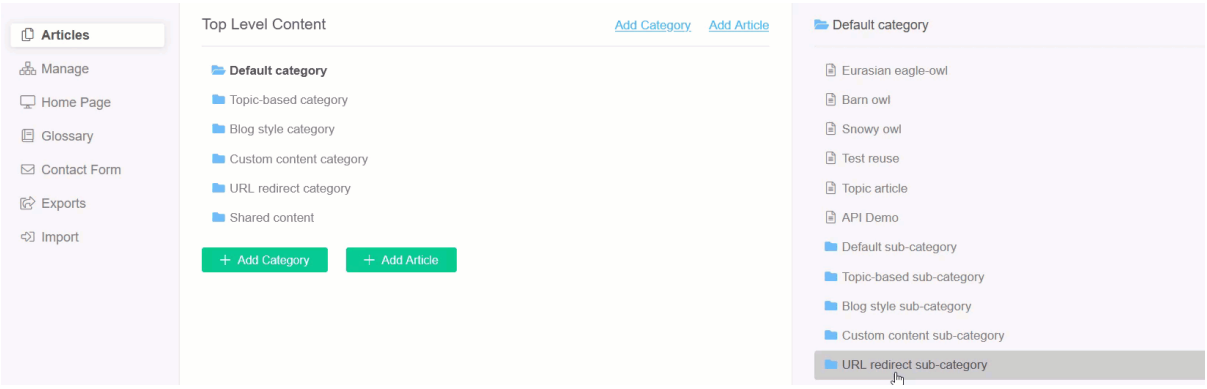
In **Knowledge Base** > **Articles**, in addition to reordering content inside the current level, you can also:

- Move articles and categories to the top category level
- Move articles and categories into other categories (note that some category types cannot contain subcategories)
- Move articles and categories into other subcategories

To do this:

1. Click and hold on the title of the article or category you want to move.
2. Drag and drop it into the desired category, or drop it in the outline box for "Move to Top Level".



If you don't want to mess with drag and drop, you can also change the category an article or subcategory is located in the editor. To do so:

1. Open the article or category you want to move for editing.
2. In the righthand column of the editor, find the **Category** section. If the section is collapsed, expand it.
3. To make the content a **top-level** category or article, select the trashcan icon (article editor) or the red X icon (category editor) to remove the category entirely. Be sure to **Save** after making this change!



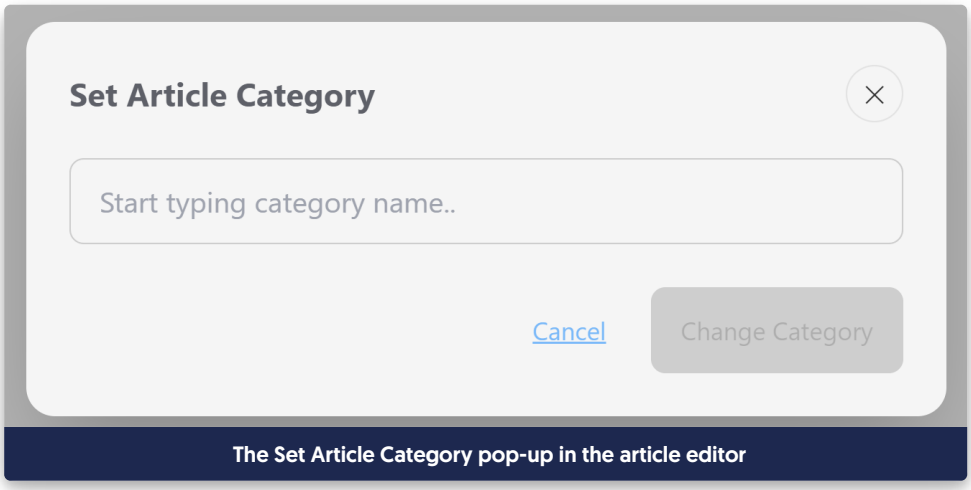
Use the trashcan icon in the article editor to remove the category completely

4. To replace the current category with a different category, select the **Change category** button (article editor) or click the gear cog icon next to the category title (category editor).



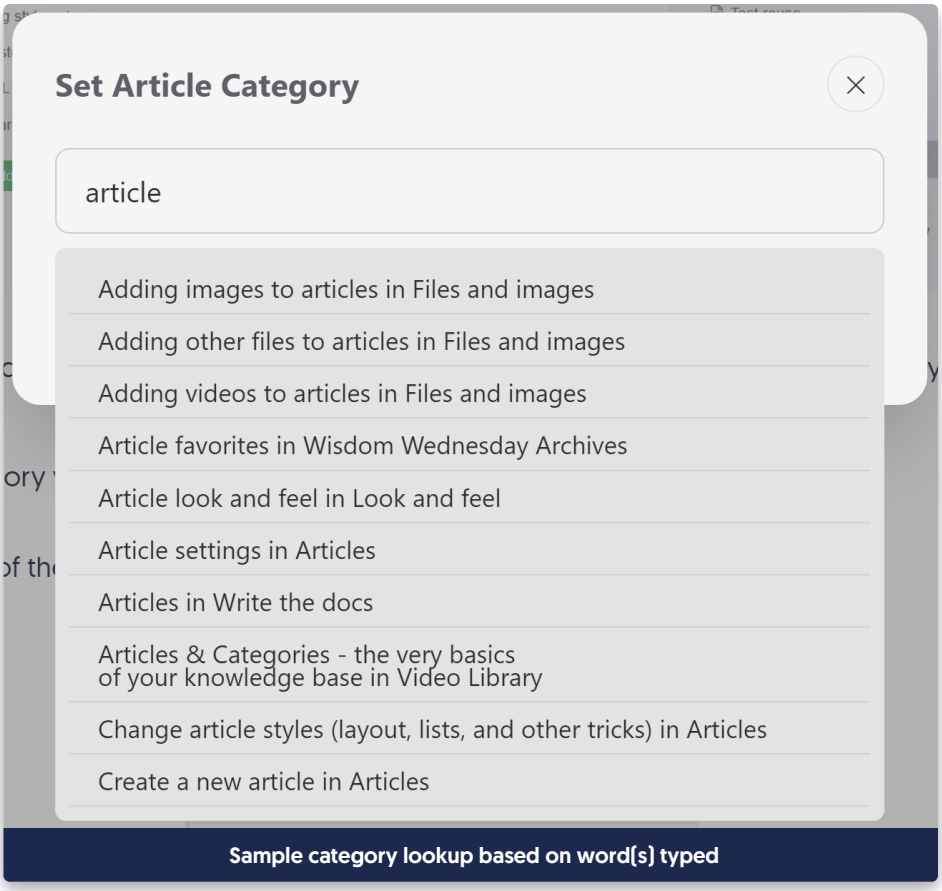
The Change category button in the article editor.

   a. This will open a **Set Article Category** pop-up where you can search for the new category by typing the name.

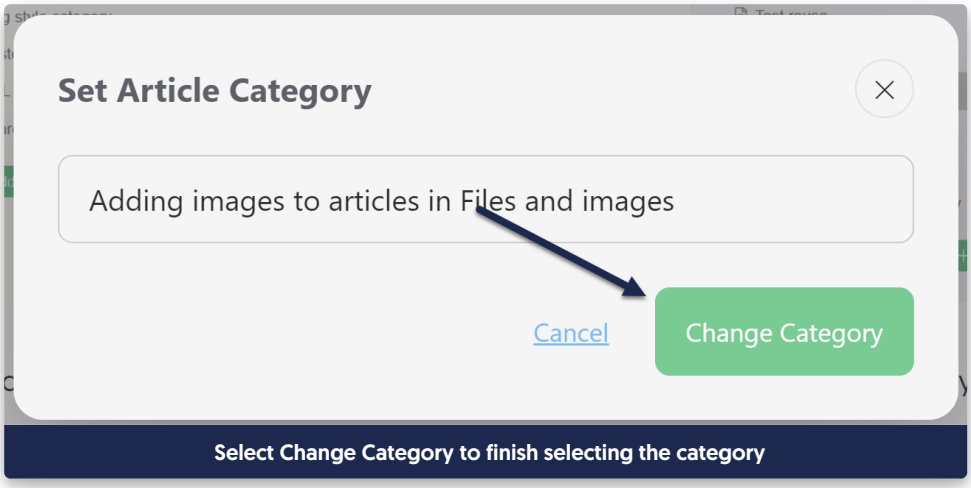


The Set Article Category pop-up in the article editor

   b. Once you type a few letters, a list of matching categories appears. Select the category you want to switch to.



c. **Once you've made your selection, click the Change Category button.**



5. **Be sure to Save your changes.**

Delete an article

Last Modified on 05/29/2024 5:28 pm EDT

There are two ways to delete an article: by changing the article status, and by clicking delete in the articles list. Both methods give you the option to set up an article redirect when you delete the article. You can also set up redirects separately using Old Links.

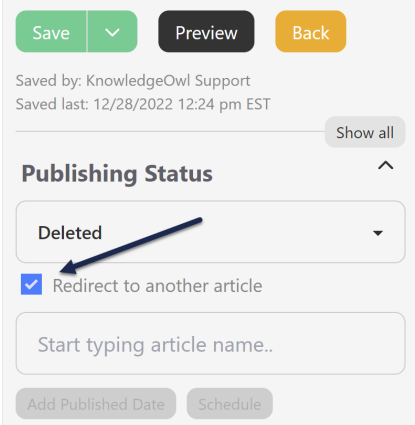
You can also bulk delete articles. Refer to Deleting articles in bulk in Manage for more information.

Deleting an article will:

- Remove it completely from your live knowledge base (the table of contents, category landing pages, search results, article lists)
- Show a 404 page when someone navigates to the article's URL, unless you've set up an old link to redirect to a different page.
- Delete all view data for the article. This data will not be recovered if you recover the article and will disappear from the Popular Articles Report.
- Remove it from the Articles hierarchy (though you can still find it in the **Knowledge Base > Manage > Deleted** filter)

Set article status to deleted

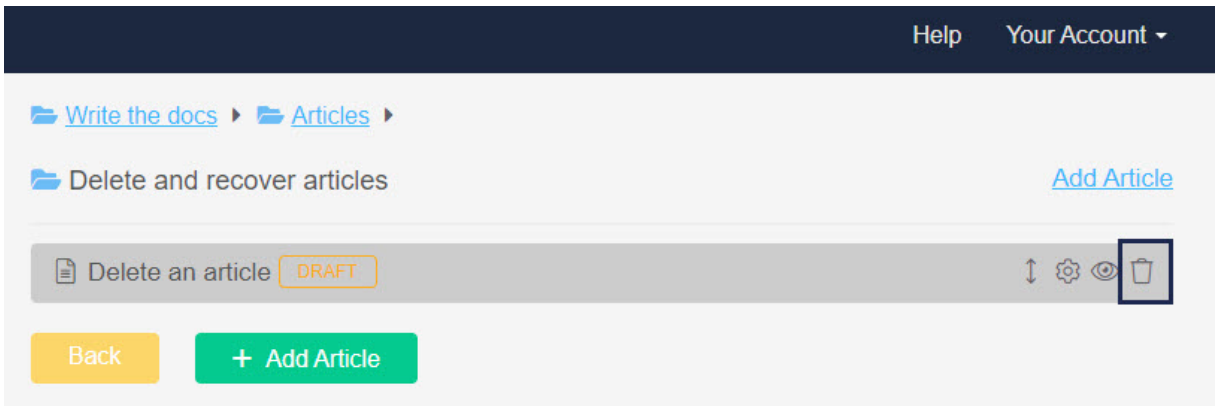
1. Open the article for editing,
2. Select **Deleted** in **Publishing Status.**
3. *Optional:* KnowledgeOwl displays the **Redirect to another article checkbox.** If you want to redirect the article's URL to another article, select the checkbox, then type an article name in the text box and choose an article to redirect to.



4. Select **Save** to set up the redirect (if you chose to create one) and delete the article.

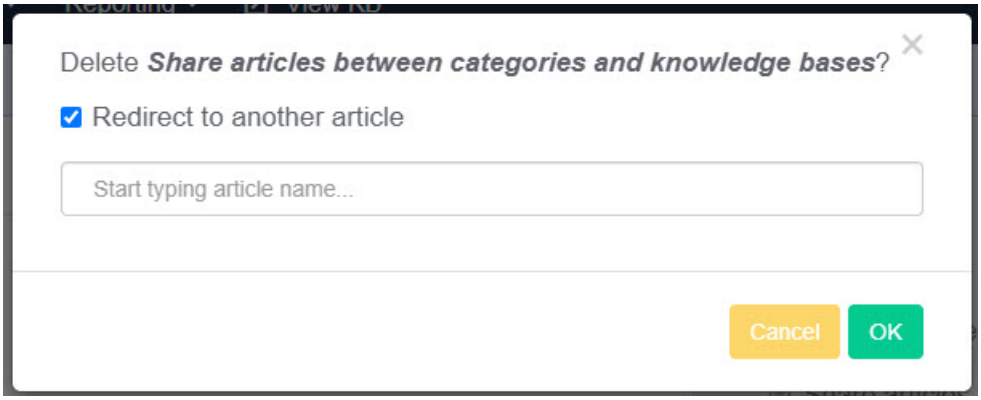
Delete an article from the Articles list

1. In **Knowledge Base > Articles**, hover over the article, then select the **Delete** icon.



2. KnowledgeOwl displays a prompt asking you to confirm deletion, and giving you the option to redirect the article to another article.

3. *Optional:* To redirect the article, select **Redirect to another article** in the prompt, then type an article name in the text field.



4. Select **OK** to set up your redirect (if you chose to create one) and delete the article.

Delete articles in bulk in Manage

Last Modified on 05/29/2024 5:28 pm EDT

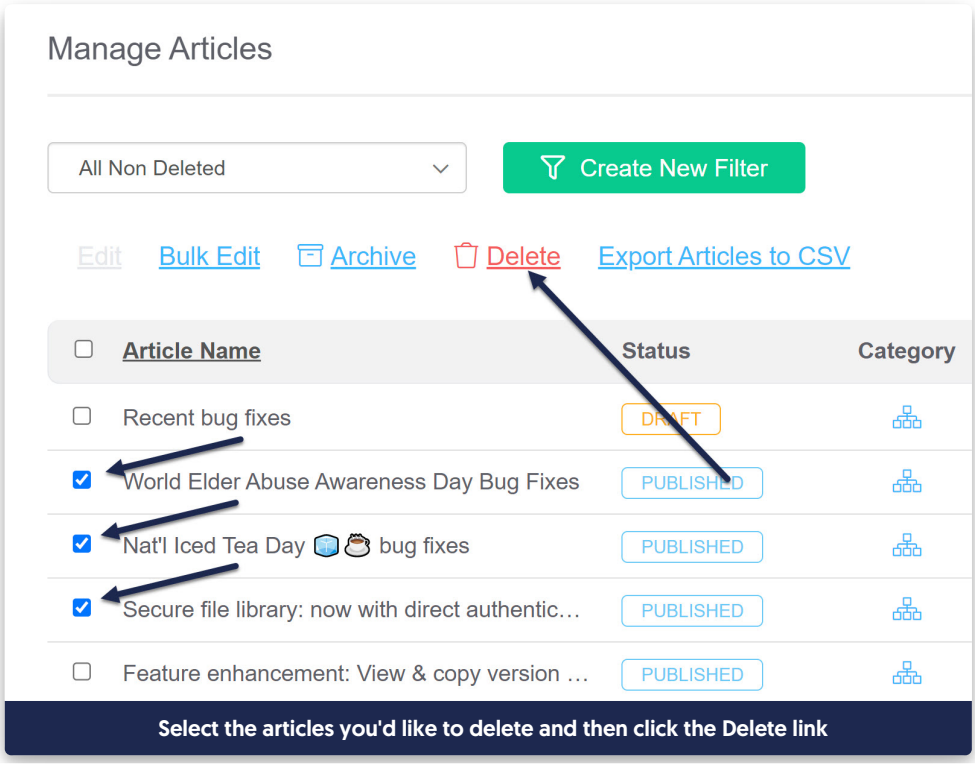
Our default **Editor** and **Writer** roles have permission to delete articles. If you're using a custom author role, that role must have the Article Permission to **Delete articles** to bulk delete articles.

Deleting an article will:

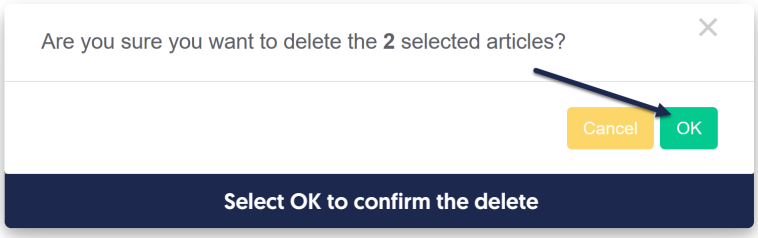
- Remove it completely from your live knowledge base (the table of contents, category landing pages, search results, article lists)
- Show a 404 page when someone navigates to the article's URL, unless you've set up an old link to redirect to a different page.
- Delete all view data for the article. This data will not be recovered if you recover the article and will disappear from the Popular Articles Report.
- Remove it from the Articles hierarchy (though you can still find it in the **Manage > Deleted** filter)

You can delete multiple articles at once using Manage Articles. To do so:

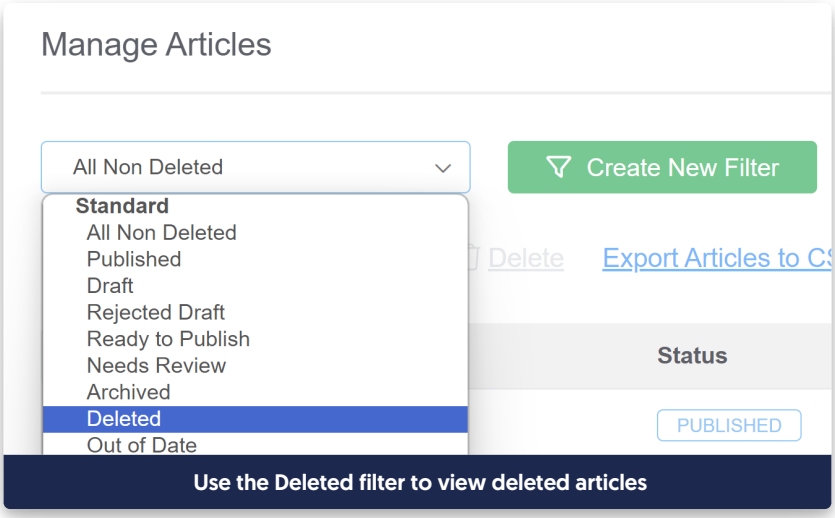
1. In the top section of the lefthand navigation, select **Manage**.
2. Use a filter or search to display the articles you'd like to delete.
3. Check the box next to each article you'd like to delete. (Or use the checkbox in the header to select all displayed articles/all articles in filter.)
4. Select the **Delete** link just above the article list.



5. **A confirmation message will appear, identifying how many articles you've selected to delete. Select OK to delete the articles you selected.**



Once the articles are deleted, if you need to view or edit them, selected Deleted from the filter dropdown at the top to view a full list of deleted articles:



Recover a deleted article

Last Modified on 05/29/2024 5:28 pm EDT

What happens if you accidentally deleted an article?

Good news: it's not gone forever!

KnowledgeOwl stores all deleted articles in **Knowledge Base > Manage**. You can access deleted articles by using the Deleted standard Manage filter or creating a custom Manage filter looking for deleted articles.

Once you have a filter that displays the article you'd like to recover:

1. Click the name of the article. This will open the article into Article Editor in a new tab.
2. In the editor, use the Publishing Status dropdown to resave the article with whatever publishing status you'd prefer (such as Draft, Published, etc.).
3. By default, the article will be re-added to the category it was originally located within. If you've deleted or rearranged since then, be sure to update the article's **Category** so that it's within a valid category.
4. **Save** your changes.
5. If you set up any Old Link redirects when you deleted the article, you'll also need to remove those.
    a. If you can't remember where you used them, go to the All Non-Deleted filter in Manage and Export the Manage Articles list to CSV. Be sure to include the Old links column in your export.
    b. Then search the CSV for the permalink of the article you recovered. Articles that have that permalink in their Old links field will need to be edited to remove the old link.

Recover multiple deleted articles

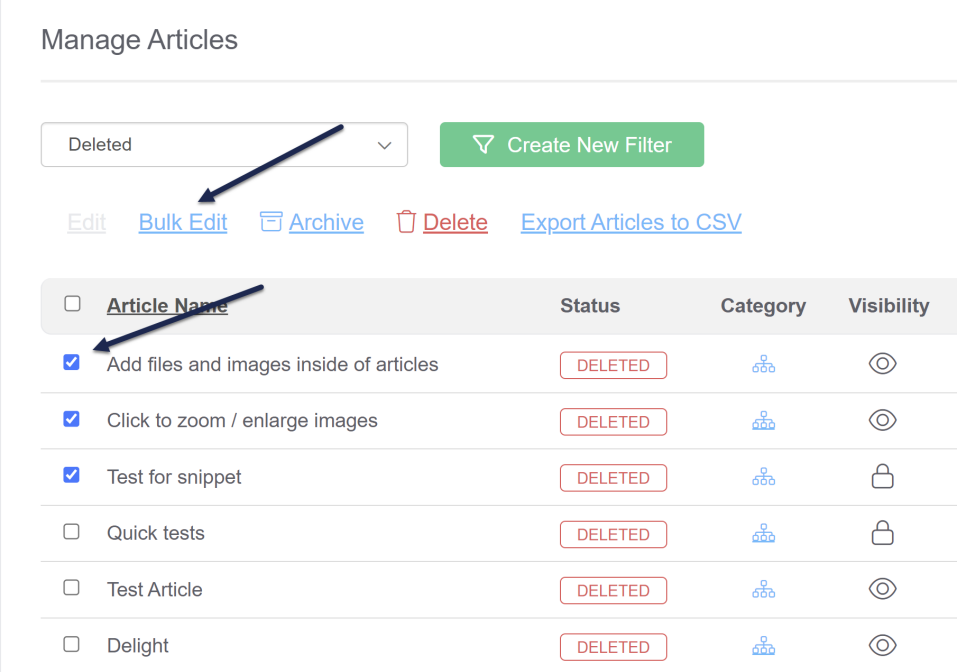
Last Modified on 05/29/2024 5:28 pm EDT

If you accidentally deleted multiple articles and need to recover them, the good news is that you can. Articles recovered using this method will be re-added to the category they were in when they were deleted. If you've also deleted the entire category, contact us for help with recovering the full category.

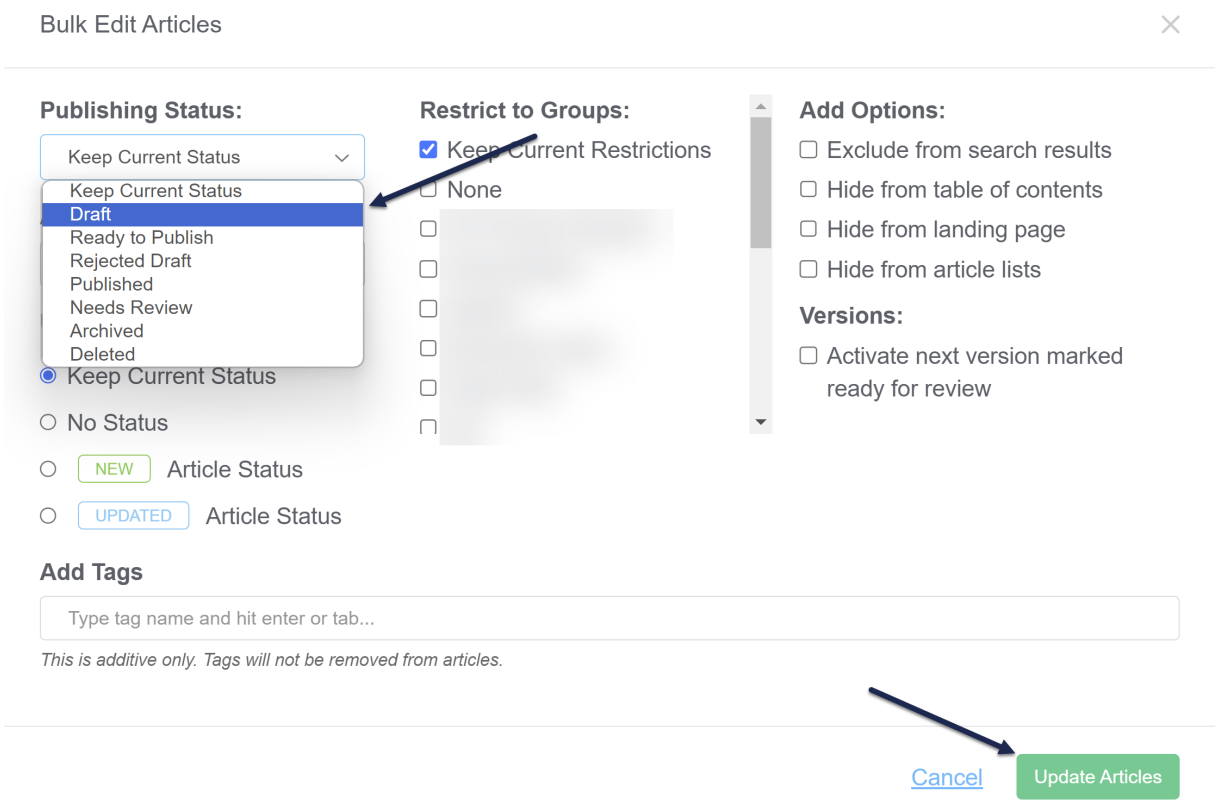
KnowledgeOwl stores all deleted articles in **Knowledge Base > Manage**. You can access deleted articles by using the Deleted standard Manage filter or creating a custom Manage filter looking for deleted articles.

Once you have a filter that displays the articles you'd like to recover:

1. Check the boxes to the left of the articles you'd like to recover.
2. Once you've selected all of the articles you'd like to recover, select the **Bulk Edit** link.



3. In the Bulk Edit pop-up, set the **Publishing Status** to whatever status you'd prefer (such as Draft, Published, etc.).
4. Once you've finished making your bulk edit selections, click the **Update Articles** button.



5. **If you're editing a large volume of articles, you'll see the bulk edit progress bar, which will tell you when it's done. If you're editing a small number, the edit should complete promptly. Either way, the Manage filters will update to no longer show the articles as Deleted.**

6. **If you set up any Old Link redirects when you deleted the article, you'll also need to remove those.**
    - **If you can't remember where you used them, go to the All Non-Deleted filter in Manage and Export the Manage Articles list to CSV. Be sure to include the Old links column in your export.**
    - **Then search the CSV for the permalink of the article you recovered. Articles that have that permalink in their Old links field will need to be edited to remove the old link.**

Who can access the files and images in my knowledge base?

Last Modified on 05/29/2024 5:28 pm EDT

The Security Settings for your knowledge base (**Settings** > **Security**) determine the general security requirements for readers to access your knowledge base.

The files you upload to your knowledge base--PDFs, Excel sheets, screenshots, Word documents, etc.--do not automatically use this same security.

By default, even if your knowledge base requires login, the files you've uploaded do *not* require login. This is by design so that you can give customers the link to specific documents and they can easily download the file by clicking on that link or URL without having to log in to your knowledge base.

However, you can adjust your security settings so that readers have to be logged in to access files and images stored within your knowledge base.

File size limits

Last Modified on 05/29/2024 5:28 pm EDT

You can upload as many files to your knowledge base as you'd like, but we do have one limit:



Files uploaded to the File Library cannot be larger than 200MB.

If you try to upload files larger than this, you'll likely receive some kind of error during the upload process.

For files larger than 200MB, we recommend using a third-party file or video-hosting service.

You can then use that service's options to embed the file within KnowledgeOwl or set up URL redirect articles or categories to direct people to the files.

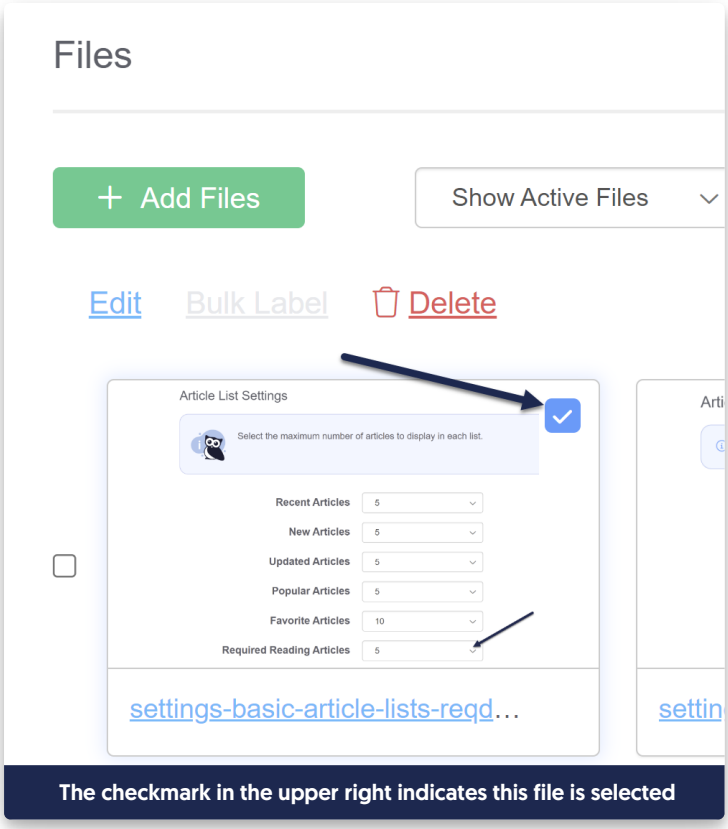
Find a file's URL

Last Modified on 05/29/2024 5:28 pm EDT

There are a few places within KnowledgeOwl where you might need to have the URL to your image, like Changing the background image on your homepage.

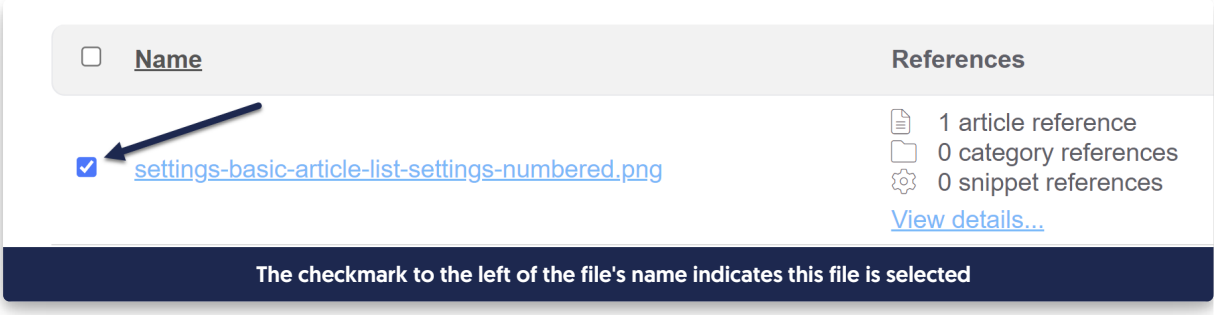
You can copy the URL for a file quickly from the File Library:

1. In the lefthand navigation, go to **Library > Files**.
2. If you're viewing the File Library in Icon view, click on a file thumbnail to select it. You should see a checkmark in the upper right of the thumbnail once you've selected it:



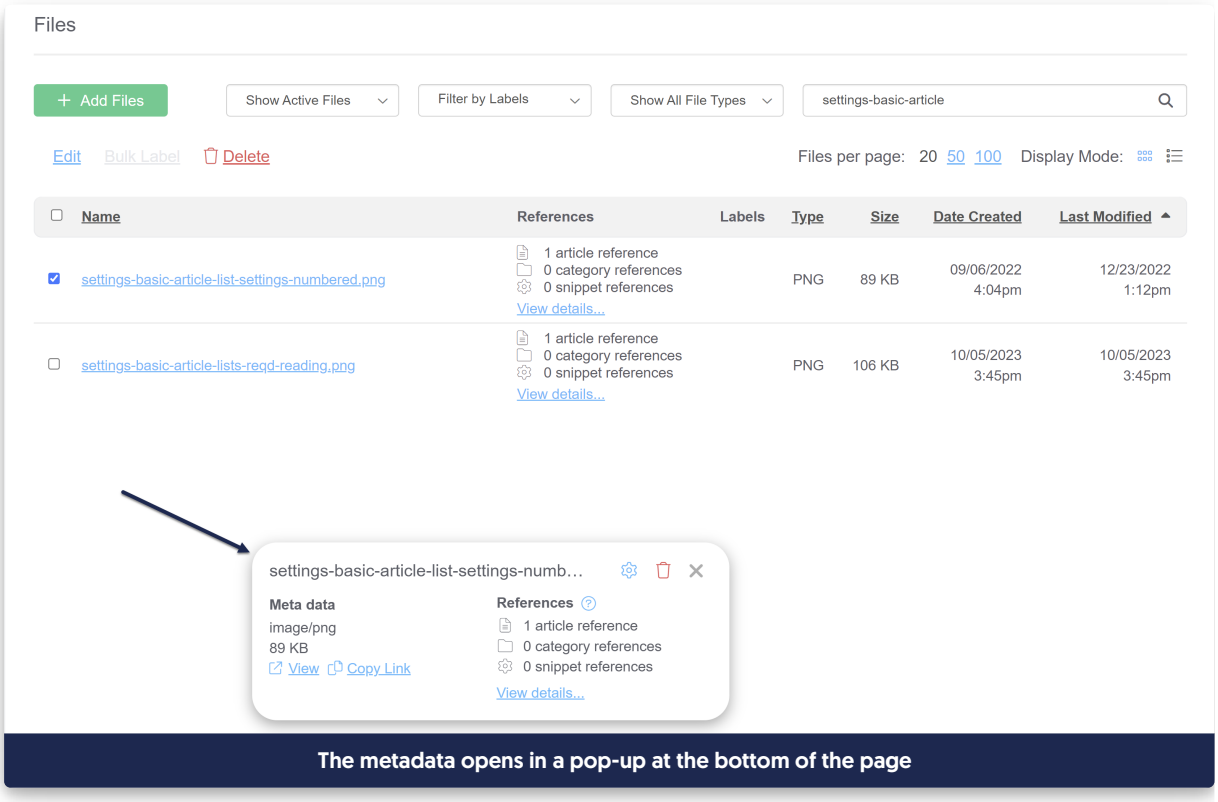
The checkmark in the upper right indicates this file is selected

3. If you're viewing the File Library in List view, click anywhere in the file's row or click the checkbox to the left of the file name to select it. You should see a checkmark to the left of the file's name once you've selected it:



The checkmark to the left of the file's name indicates this file is selected

4. **This will open the details of the file in a pop-up at the bottom of the page.**



5. **Click the Copy Link link to copy the URL to your clipboard.**



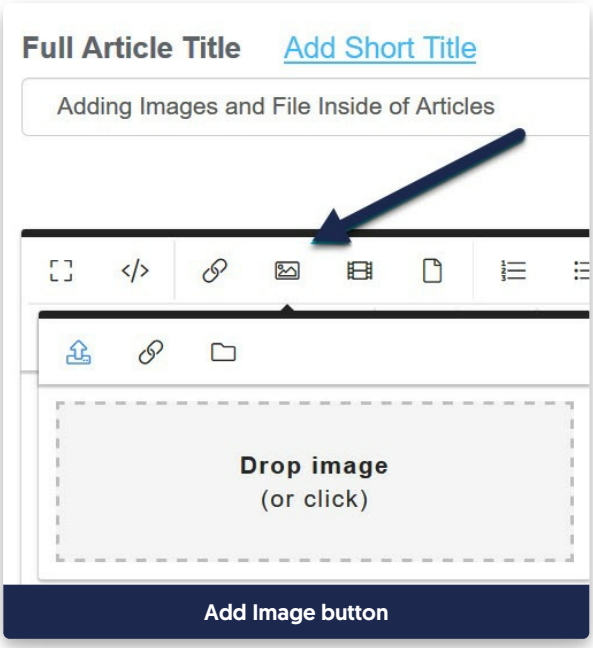
Add images to articles: Modern Editor

Last Modified on 05/29/2024 5:27 pm EDT

Images, screenshots, and sample files can add examples and detail to your documentation. The process of adding files and images to articles differs a little between the Modern Editor and the Legacy Editor. Here, we walk through how to add images to your articles using the Modern Editor

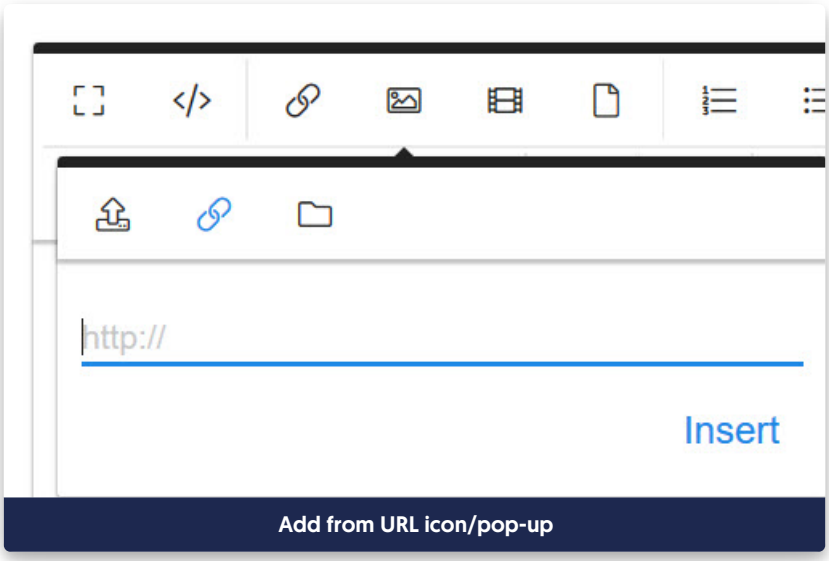
To add images to your articles in Modern Editor:

1. Open the article in the editor.
2. In the editor control panel, select the **Add Image** icon (looks like a landscape), or use Ctrl + P:



3. You can choose to upload a new image, add an image by URL, or add an existing image from your library.
4. To upload a new image:
    a. Click the icon with the arrow pointing up.
    b. You can drag and drop an image into this pop-up, or click the window to browse to an image for upload.
5. To add an image by URL:
    a. Click the chain links.
    b. Add the URL for the image into the URL field.

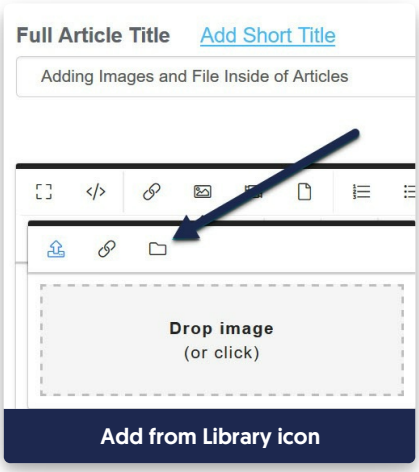
c. Select **Insert:**



Add from URL icon/pop-up

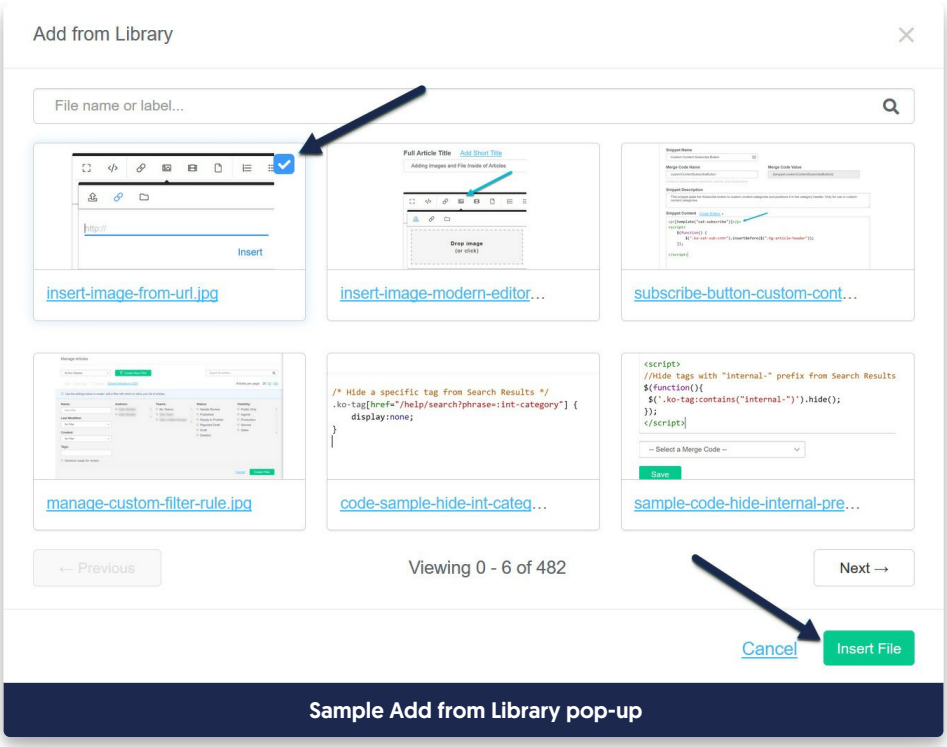
6. To add an existing image from your library:

a. Click the folder icon:



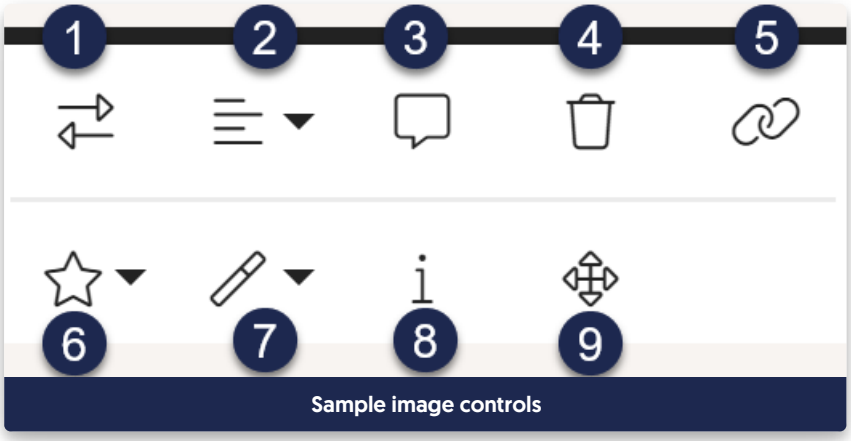
Add from Library icon

b. This will open a pop-up where you can search for files, with the most recent images first. Select the image you'd like to upload, then select **Insert File.**



Sample Add from Library pop-up

7. Once your image is inserted, you can click on it to open a set of controls that will let you change the style, add a caption or alt text, change the alignment, and more:



Sample image controls

   a. **Replace:** Use the two-arrow icon to select this image for replacement, then use the controls to select or upload the image you'd like to replace it with.

   b. **Align:** Use these controls to select the alignment for the image. Options include left, right, and none (none typically centers it).

   c. **Image Caption:** Add a caption to your images, like we have displayed here in the blue bars under the images!

   d. **Remove:** Remove the image from your content completely.

   e. **Insert Link:** If you'd like your image to serve as a clickable hyperlink, such as for navigation, use this option to add the hyperlink and behavior.

   f. **Display:** Choose whether to display the option Inline (which will wrap text) or Break Text (which will put the image on a new line).

g. **Style:** Select from several pre-built images styles. By default, all images are given the **Responsive Image** style to help the image resize on different screen sizes, but you can also choose Rounded (which will round the corners), Circular, and Thumbnail (adds a border).

h. **Alternative Text:** Enter the text you'd like displayed if the image can't be loaded or that is used when a screen reader is being used. Refer to Add alternative text to images for more information on using this control.

i. **Change Size:** Use these options to adjust the Width and Height by entering a number. You can also click and drag the corner control to resize.

8. Once you've finished inserting and tweaking your images, be sure to **Save** your edits!

Looking for more philosophical than practical guidance? Check out our Image best practices guide.

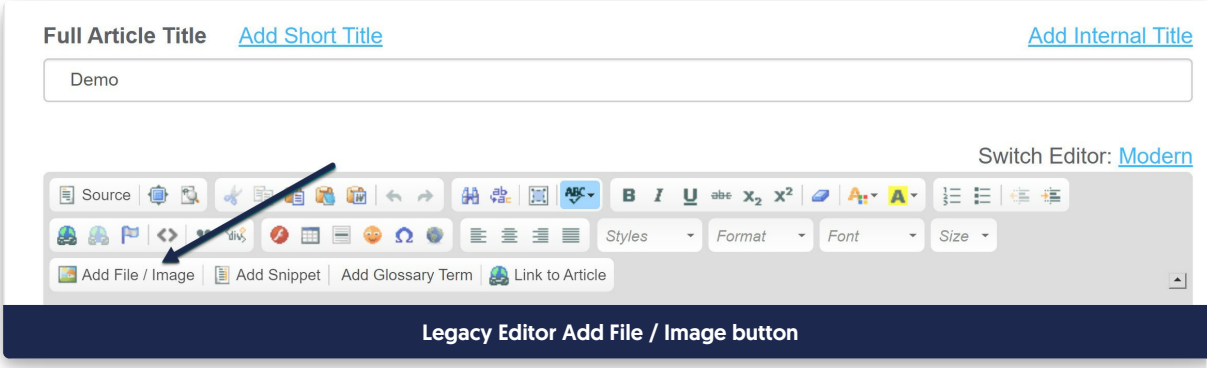
Add images to articles: Legacy Editor

Last Modified on 05/29/2024 5:27 pm EDT

Images and screenshots can add examples and detail to your documentation. The process of adding files to articles differs a little between the Modern Editor and the Legacy Editor. Here, we walk through how to add images in the Legacy Editor.

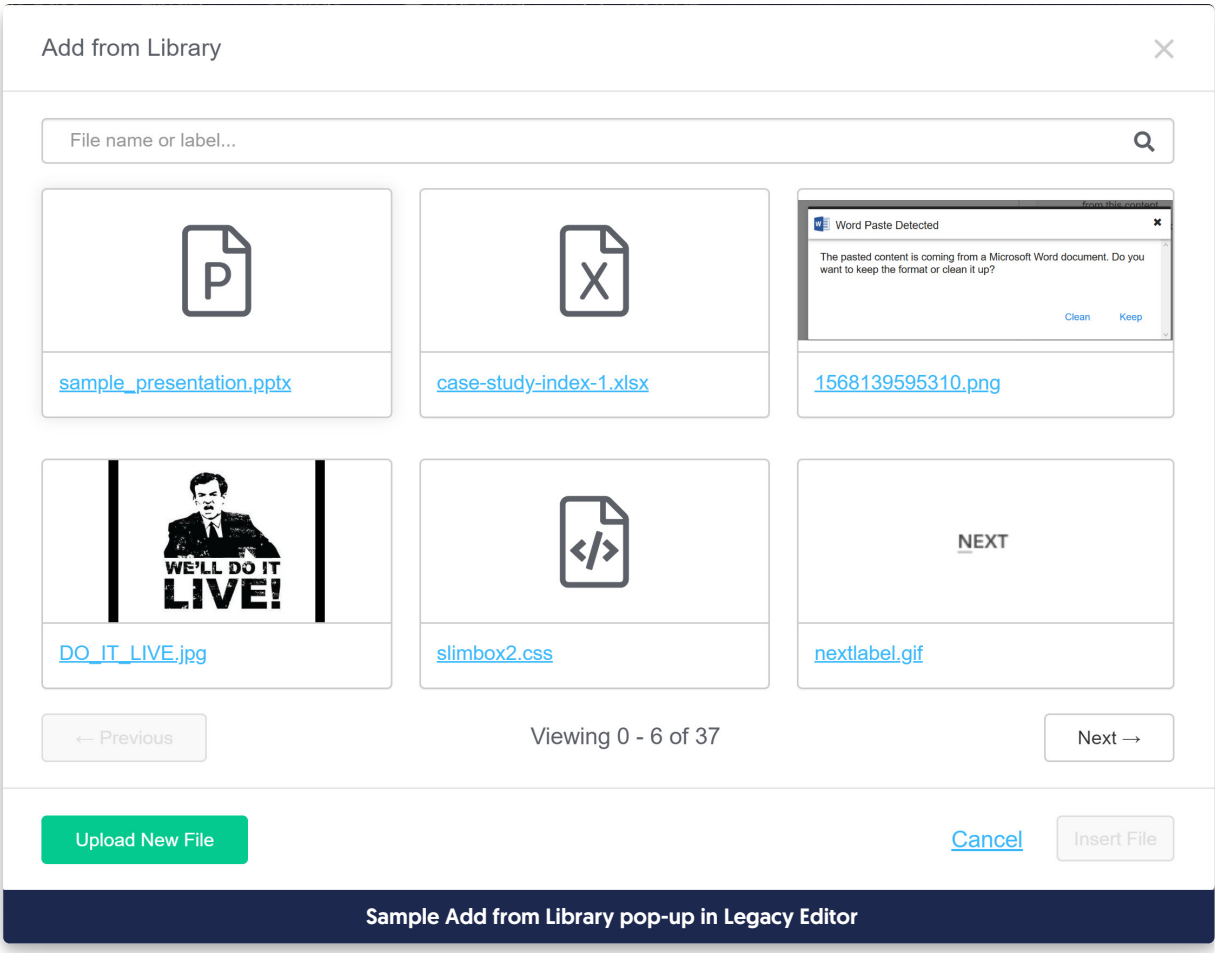
To add images or files into your articles using our Legacy editor:

1. Open your article in edit mode.
2. Click on the **Add File / Image** button near the top.



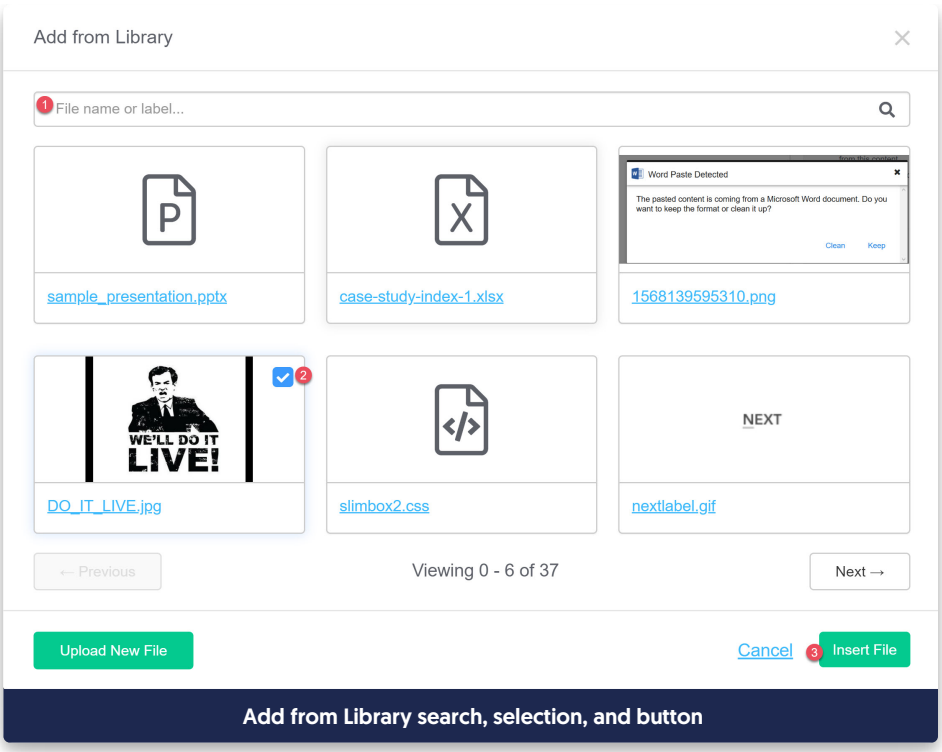
Legacy Editor Add File / Image button

3. This will open the **Add from Library** pop-up, displaying the most recent files first.



Sample Add from Library pop-up in Legacy Editor

4. **To use an existing image in the File Library:**
    a. **If necessary, use the search bar at the top to search for the image you want to add.**
    b. **Click on the image to select it.**
    c. **Click the Insert File button to insert the image into your article.**

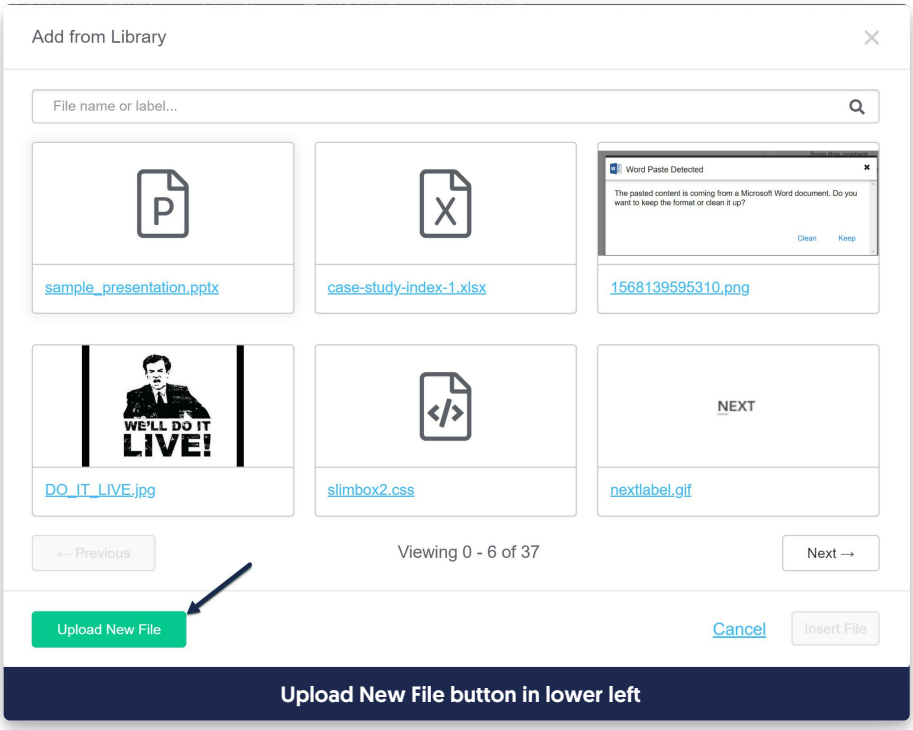


Add from Library search, selection, and button

d. Select **Save** once you've added the images you want.

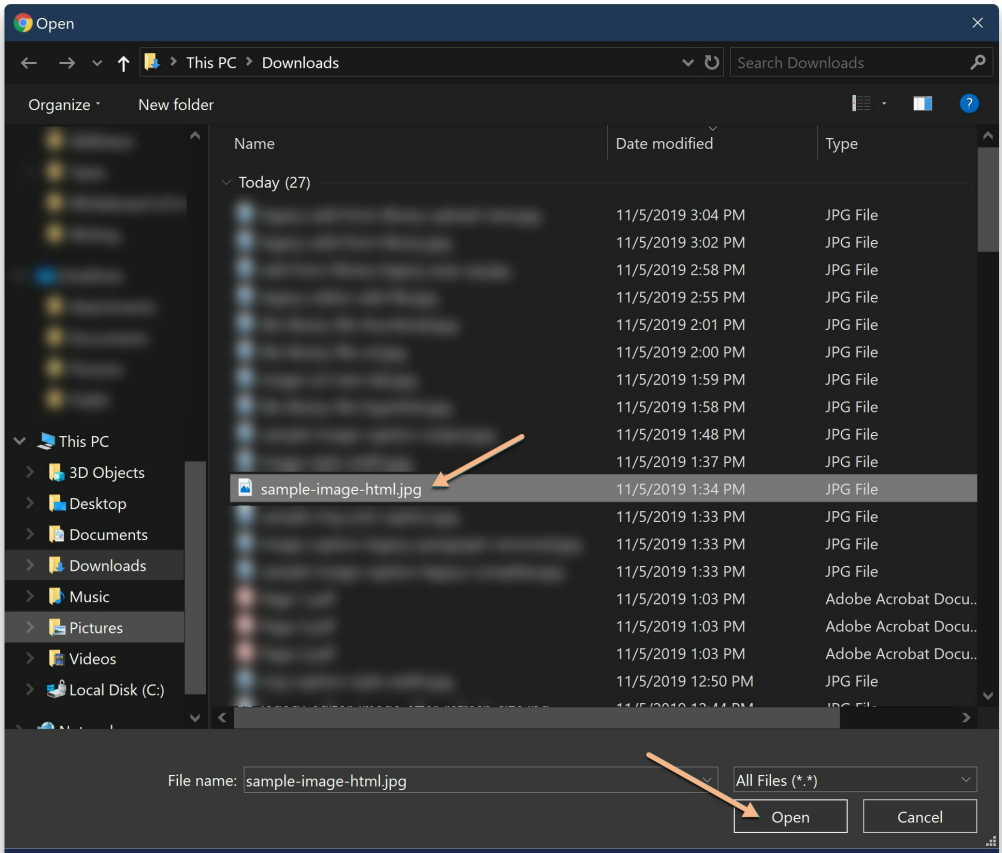
5. To add a new file to your article and the library:

   a. Click the **Upload New File** button in the lower left corner.



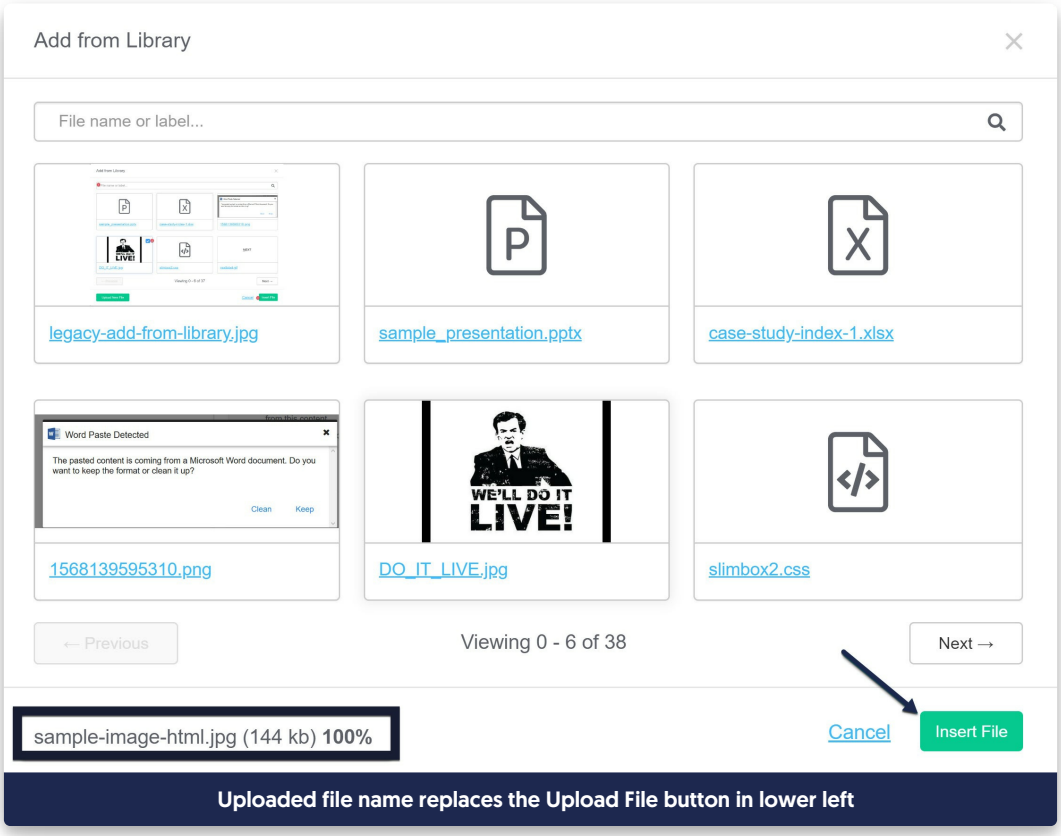
Upload New File button in lower left

   b. This will open an explorer window; navigate to the image you wish to upload, select it, and click the Open button in the lower right.



Sample explorer window to find and select the file you want to upload

c. **You'll see the name of the file you selected for upload in the lower left. Make sure it's what you wanted. Then click the Insert File button to insert the file into your article.**



Uploaded file name replaces the Upload File button in lower left

d. **Select Save once you've added the files you want.**

Add alternative text to images

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If you're following accessibility best practices, informative images in your documentation should include an **Alternative Text** (also known as alt text) to provide a short description conveying the essential information presented by the image. This text can be used by screen readers and other assistive devices to help convey the information the image presents.

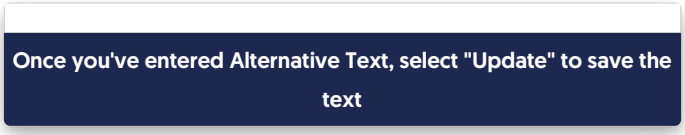
To add an alternative text to an image in your content:

1. Select the image to open the image pop-up menu.
2. Select the "i" icon for **Alternative Text**.



The Alternative Text icon is a small "i" in the image pop-up menu

3. This will open a small pop-up where you can you enter the text description.
4. Once you've entered your text description, select **Update** to apply the text to the image.



Once you've entered Alternative Text, select "Update" to save the text

5. Be sure to **Save** your article once you're done!

Decorative images--those that don't convey information but just add decoration--should include an empty Alternative Text. Our editor currently doesn't do this automatically, so to set it manually yourself:

1. Select the image to open the image pop-up menu.
2. Select the "i" icon for **Alternative Text**.



The Alternative Text icon is a small "i" in the image pop-up menu

3. This will open a small pop-up where you can you enter the text description.
4. Don't enter any text in the text box, and remove any that might exist.
5. Select **Update**. This will save an `alt=""` behind the scenes, which designates the image as for presentation rather than information.
6. Be sure to **Save** your article once you're done!

Custom image captions

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Image captions are a great way to explain what you are demonstrating in an image or to call out what you wish to have readers focus on.

The steps for adding captions to images differ depending on whether you're using the Modern Editor or Legacy Editor.

Modern Editor

In the Modern Editor, simply click on the image to open the image editing pop-up and then click the dialog bubble to add a caption:

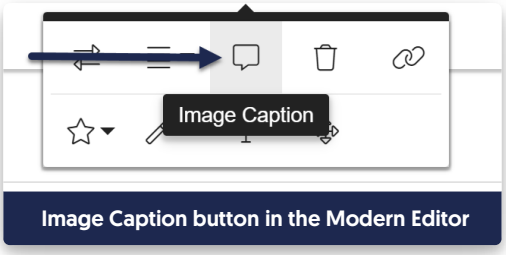


Image Caption button in the Modern Editor

This creates the image caption area and you can type in the caption you'd like.

Styling Modern Editor captions differently

To style the captions used in Modern Editor differently across your knowledge base:

1. Go to **Settings > Style**.
2. Below the Preview pane, be sure **Custom CSS** is selected.
3. Copy the default CSS below and paste it into your Custom CSS.

```
.documentation-article .fr-img-caption .fr-img-wrap>span {
   margin: auto;  /*change the margins*/
   font-size: 14px; >/*change the font-size*/
   font-weight: initial;/*font bold/not bold*/
   max-width: 100%; /*How much of the image's width should the caption take up?*/
   background: #656565; /*Background color for the caption*/
   border-radius: 0px 0px 4px 4px; /*Border-radius creates rounded corners*/
   padding: 5px; /*Padding between the text and the edge of the caption*/
   color: #fff; /*Text color*/
   line-height: 1.72222; /*Line height*/
}
```

4. Adjust the CSS however you see fit.
5. You can **Preview** your changes. Just be sure to **Save** once you're done making them!

Legacy Editor

The Modern Editor has a function to add captions to images. This tutorial explains a method to add your own captions using HTML and is primarily targeted towards people using the Legacy editor.

Setup

The setup for image captions will require you to delve into the HTML source code of your document. But don't worry--we provide what you need below, so you can copy and paste it without having to write HTML from scratch.

1. Start by uploading the image you wish to add a caption to.
2. With the image uploaded, right-click on it.
3. Click on **Image Properties**.

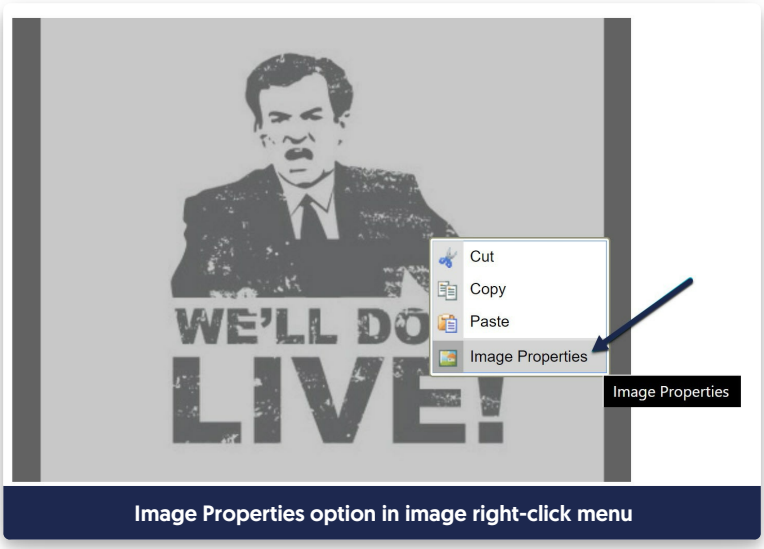
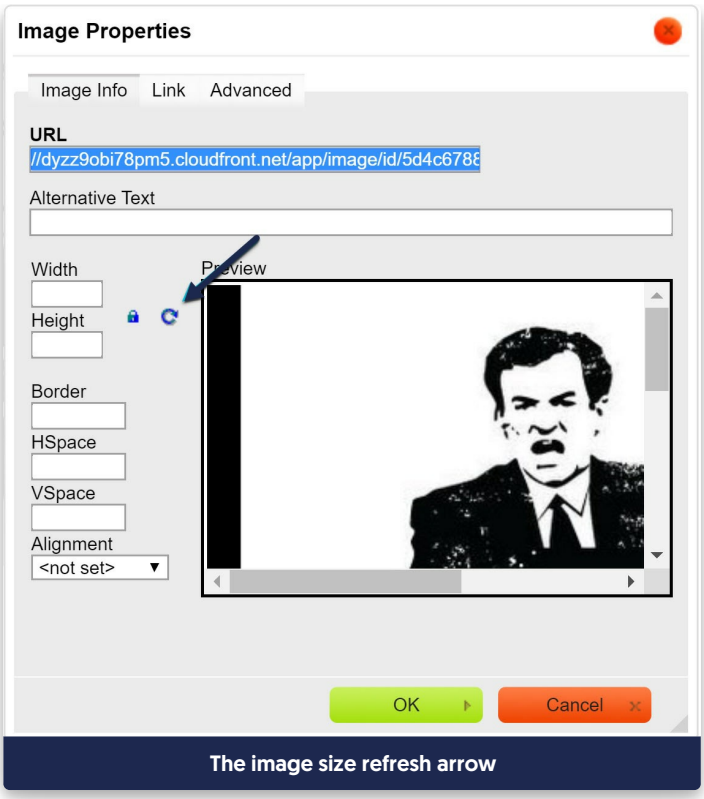
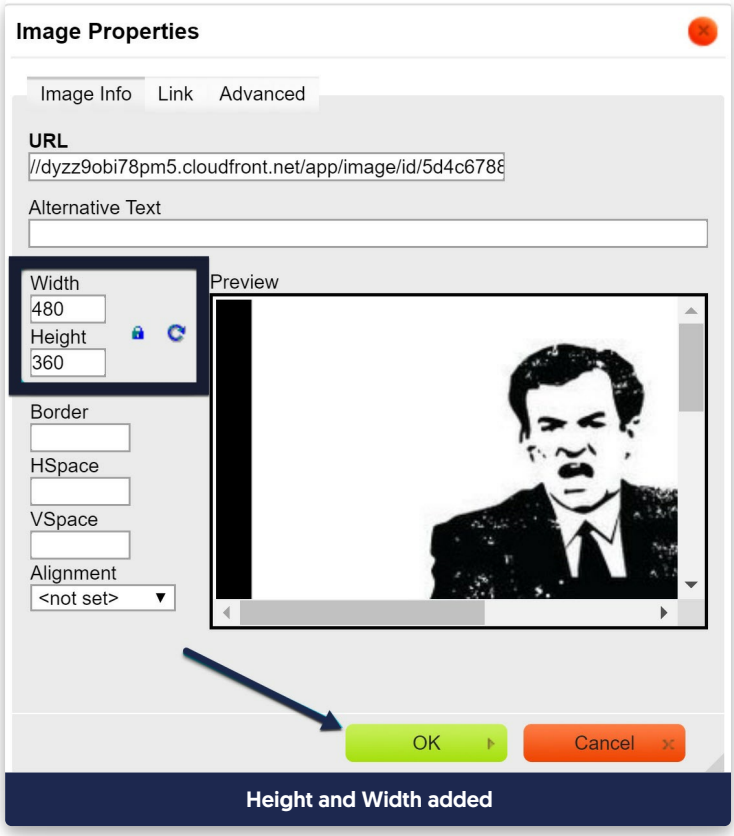


Image Properties option in image right-click menu

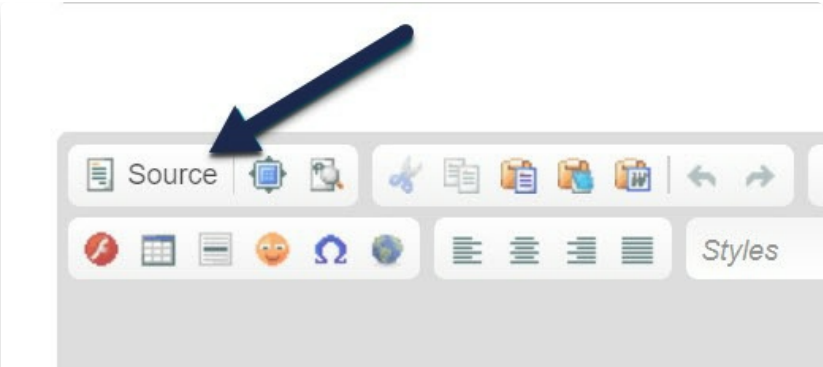
4. In the pop-up that appears, if the Width and Height fields are blank, click the refresh arrow next to height and width. (If they aren't blank, skip to step 7.)



5. **This will generate the default height and width for the image. You can leave these as-is or adjust them to your liking. Click OK when you're done adjusting.**

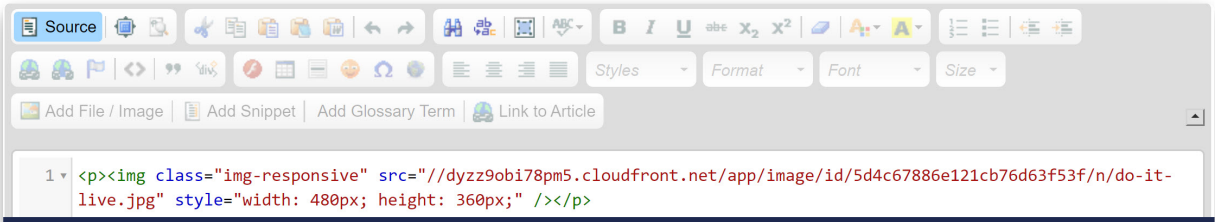


6. **With the image added with height and width, click the Source button in the editor toolbar.**



Legacy Editor Source button

7. Find your uploaded image in the HTML. It will begin with `<img class=` :



Sample image HTML in Legacy Editor

8. Copy and paste the below HTML in just before the image's HTML:

```
<div class="img-and-caption">
```

The end result will look like so:

```
1 <div class="img-and-caption">
2 <p><img class="img-responsive" src="//dyzz9obi78pm5.cloudfront.net/app/image/id/5d4c67886e121cb76d63f53f/n/do-it-live.jpg" /></p>
```

Image HTML with img-and-caption div added before it

9. If the img is in a paragraph (as ours is in this screenshot), remove the and tags before and after it:

```
1 <div class="img-and-caption">
2 <img class="img-responsive" src="//dyzz9obi78pm5.cloudfront.net/app/image/id/5d4c67886e121cb76d63f53f/n/do-it-live.jpg" style="width: 480px; height: 360px;" />
```

Same code as above, but with and tags before and after the img removed

10. You should see the width of the image at the very end of the image's HTML. Depending on how you've edited things, it will either say width="number" or style="width: number;":

```
1 <div class="img-and-caption">
2 <img class="img-responsive" src="//dyzz9obi78pm5.cloudfront.net/app/image/id/5d4c67886e121cb76d63f53f/n/do-it-live.jpg" style="width: 480px; height: 360px;" />
```

Sample image width setting

11. For the image caption, copy and paste the below HTML in *after* the image's HTML.

```
<div class="img-caption" style="width: 500px;">Your Caption Here.</div>
</div>
```

   a. Replace `Your Caption Here` with the caption text you wish to use.

b. Replace the `500px` in the width statement with the width in your image's HTML.
Here's a sample with the width set to match my image, and a caption of "My sample caption":

```
<div class="img-and-caption"><img class="img-responsive"
src="//dyzz9obi78pm5.cloudfront.net/app/image/id/5d4c67886e121cb76d63f53f/n/do-it-live.jpg" style="width: 480px;
height: 360px;" />
<div class="img-caption" style="width: 480px;">My sample caption</div>
</div>
```

Completed sample of image with caption

Style your captions

This won't look like much until we add some styles for the img-and-caption and the img-caption divs we just added. To do so:

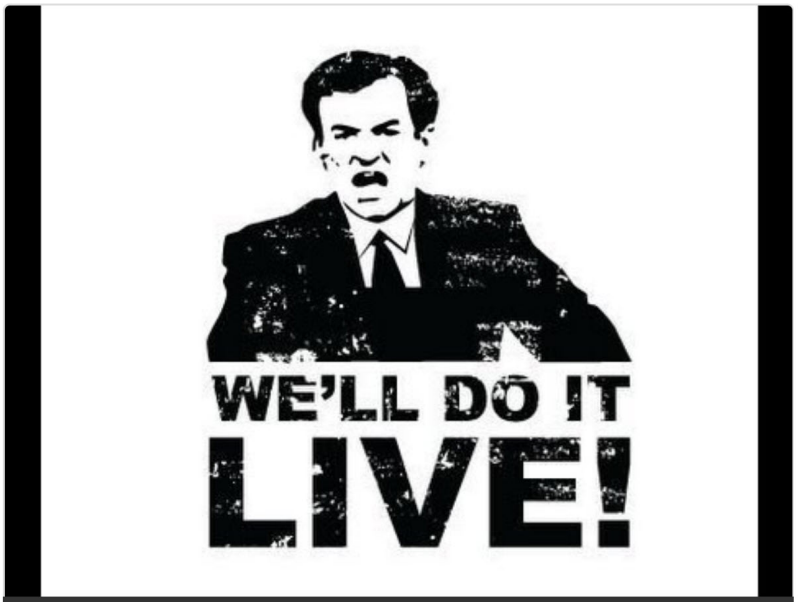
1. Go to **Settings > Style**.
2. Under the preview pane, be sure you're in the **Custom CSS** tab.
3. Copy the code below and paste it into your Custom CSS. This CSS can be customized as you desire to get the right look and feel for your knowledge base!

```
/* Format the caption itself: text alignment, padding, color = font color; border-radius sets slight curve; font-size se
.img-caption {
  text-align: center;
  padding: 5px 0;
  color: #fff;
  background-color: #333;
  border-radius: 0 0 4px 4px;
  font-size: 14px;
}

/* Add a border below the entire img-and-caption div */
.img-and-caption {
  margin-bottom: 30px;
}

/* Format images with captions to have no bottom-margin, no box shadow, a thin border around the sides and top,
.hg-article-body .img-and-caption img {
   margin-bottom: 0 !important;
   box-shadow: none;
   border: 1px solid #ddd;
   border-bottom: none;
   border-radius: 4px 4px 0 0;
}
```

These styles, applied to our original sample, will produce a caption like this:



My sample caption

Sample styled caption

Adjust image width for all images

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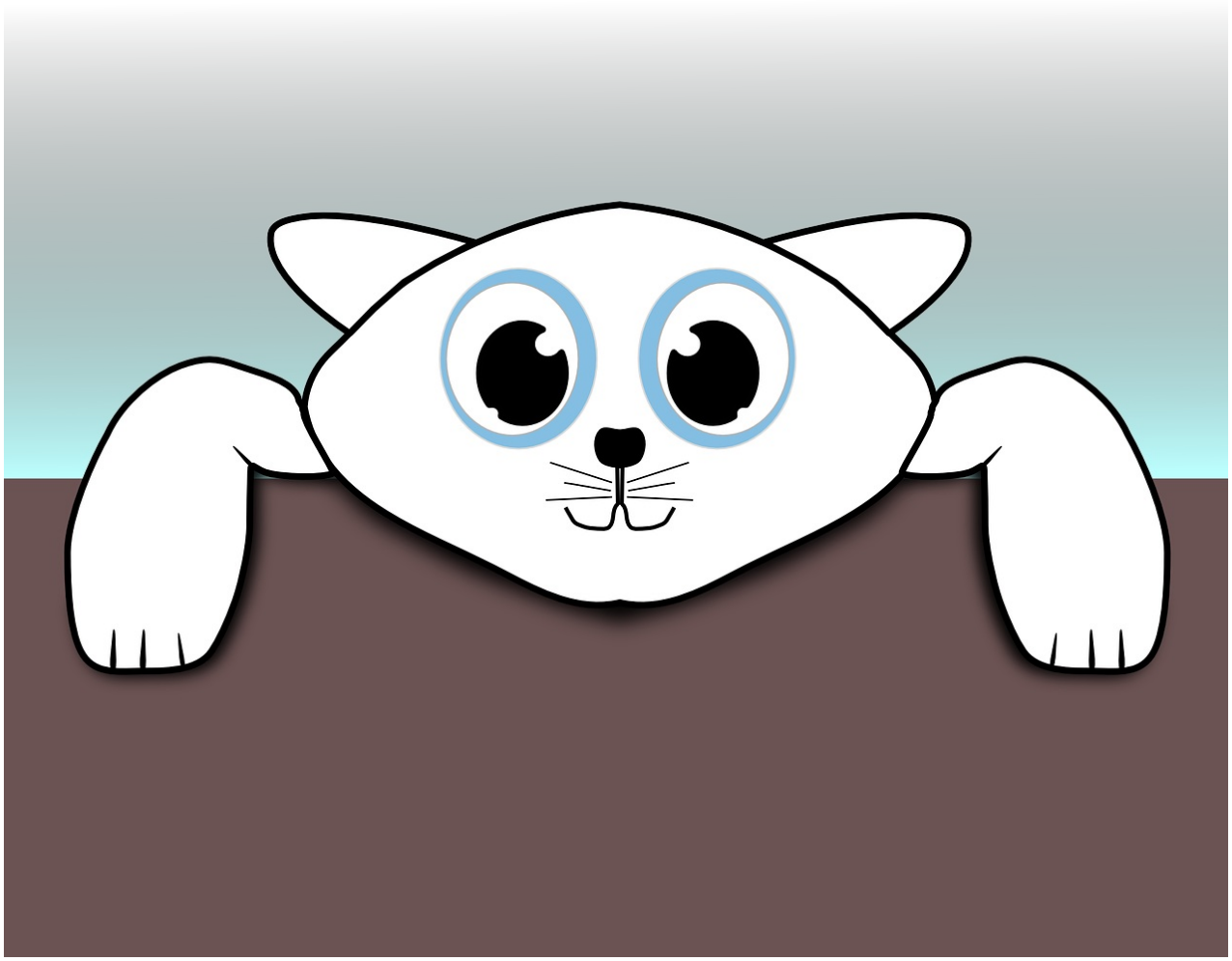
By default, KnowledgeOwl sets images to have a max-width of 100%. This means that images are displayed at actual size but can never be wider than your article--they're automatically resized to fit within the article. Here's an image with the default 100% max-width:



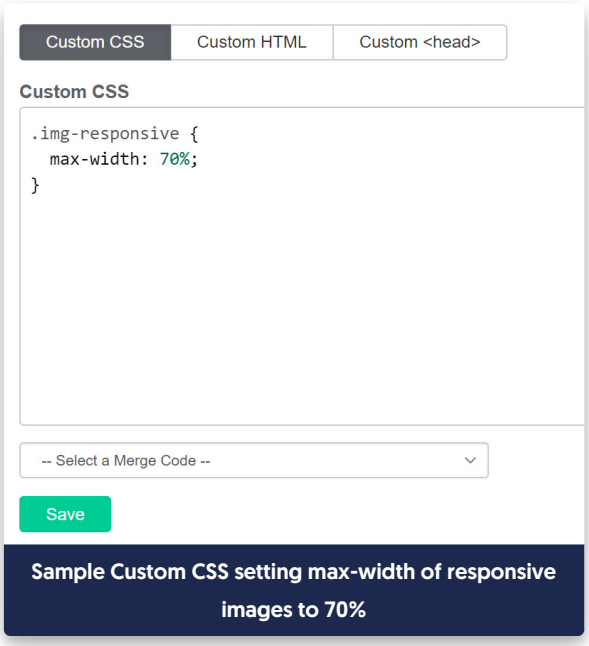
If you'd like to keep images automatically smaller than 100% width on all screens/devices, we recommend adding some Custom CSS to set that max-width to a different percentage. Using a percentage helps keep the images responsive to fit on any screen size or device.

To make this adjustment:

1. Go to **Settings > Style**.
2. Below the preview pane, click on the **Custom CSS** tab.
3. Copy this code. If you want a max-width other than 70%, adjust the percentage accordingly:

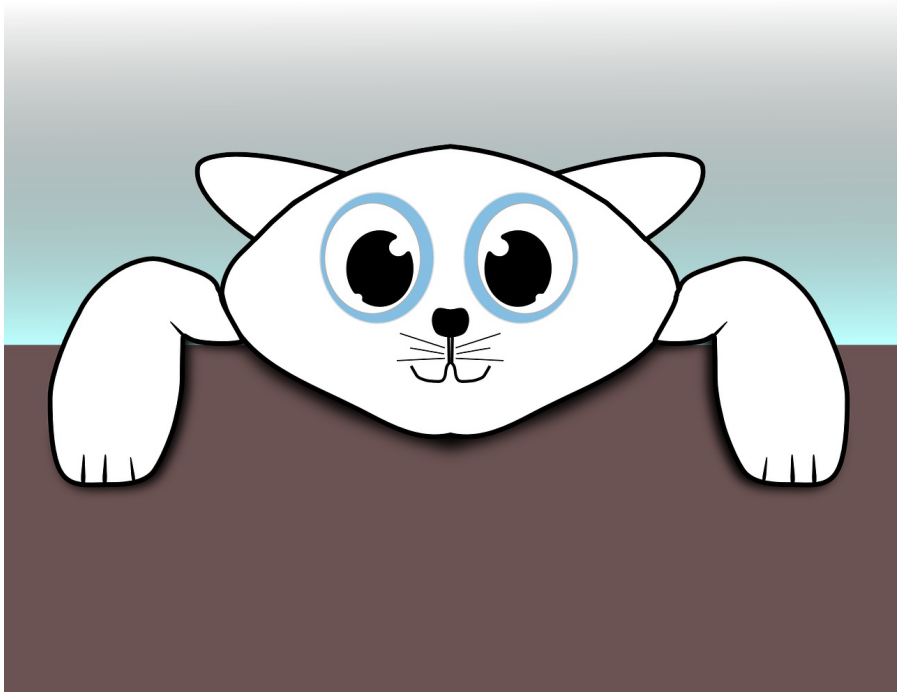
```
.img-responsive {
    max-width: 70%;
}
```

4. **Be sure to Save your changes.**
   Your code should look something like this:



Sample Custom CSS setting max-width of responsive images to 70%

Now the same image is only 70% of the width of the article:



You can increase or decrease the percentage for the desired size, and this will apply to all images in your articles.

Pro Tip: We recommend using a percentage rather than a static pixel size to ensure your images

look great on all devices.

Display images side-by-side

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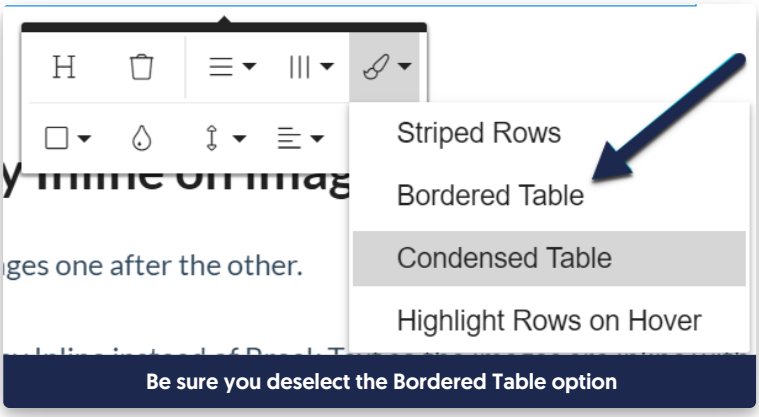
Put them in a table

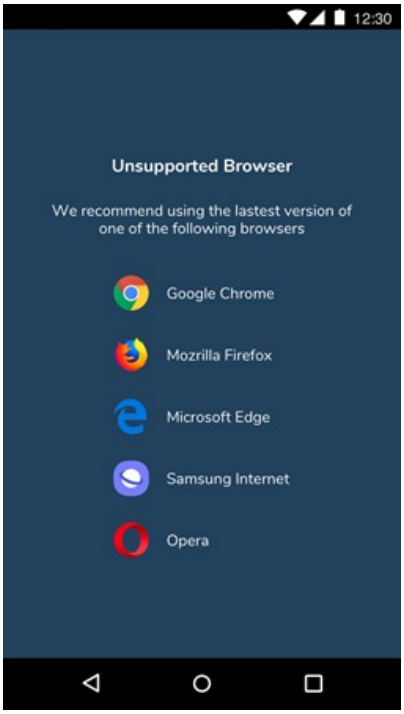
1. Create a table with one row and two cells. (Insert Table > 1 x 2.)
2. Insert the images. They should be the same size or you can set them to be the same size.
3. Click on the table to open the table menu.
4. Click on the paintbrush to open the Table Styles menu.
5. Deselect Bordered Table to remove the borders.

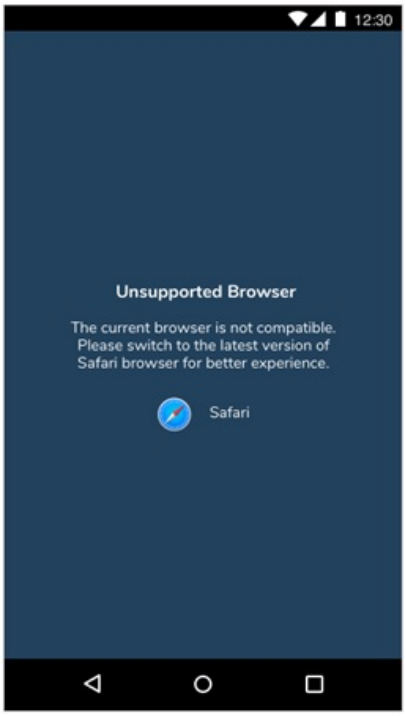


Be sure you deselect the Bordered Table option

6. You can use either the image alignment or the table cell alignment to get the desired effect (center align on the cells gives the most consistent spacing).
7. Save.

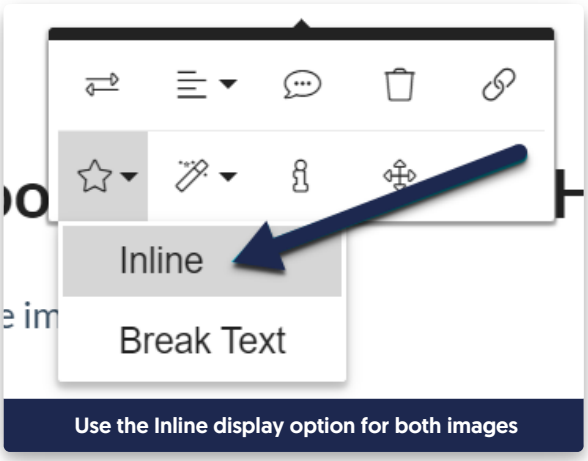
Here's a sample of this layout:





Use Display Inline on images

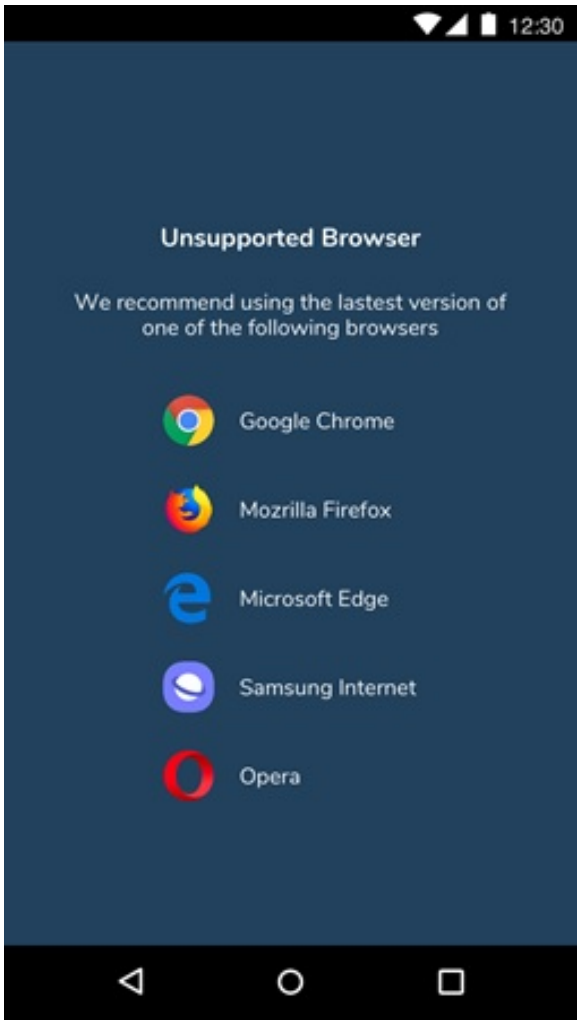
1. Insert the images one after the other.
2. For each image, click on the image once to get the image menu to appear.
3. Then click the star to show the Image Display menu.
4. Choose Display Inline instead of Break Text so the images are inline with each other.

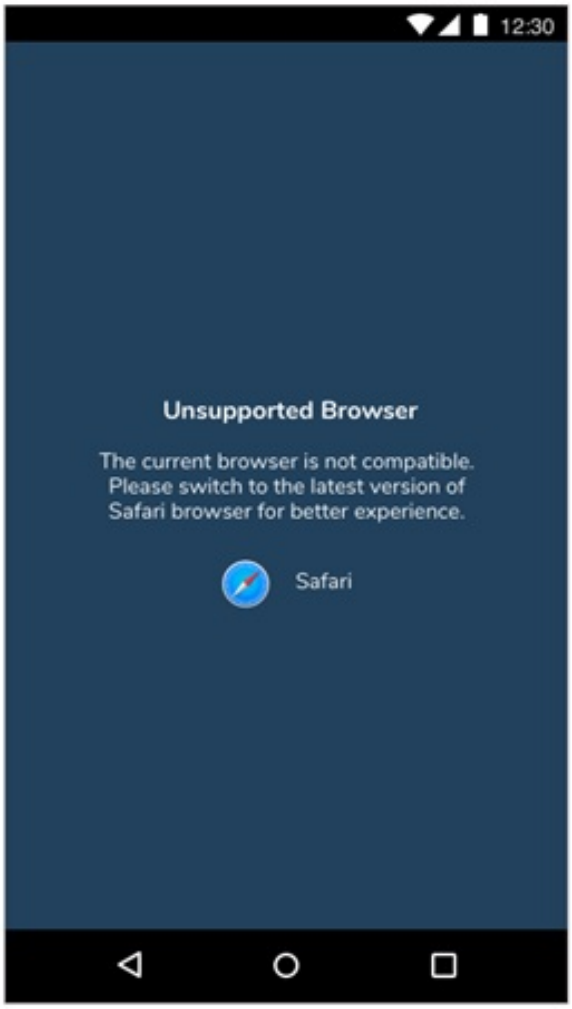


Use the Inline display option for both images

5. Adjust the widths how you want.
6. Save.

Here's a sample of this layout:





Use a Bootstrap grid in the HTML

1. Insert the images.
2. Click the < /> button to switch to the Code View.



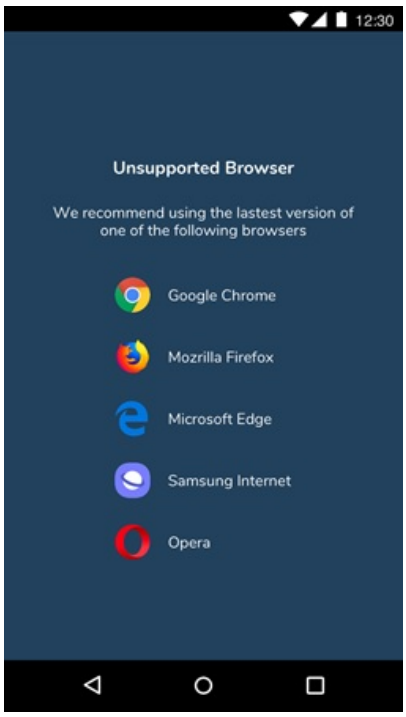
3. Add HTML to create a Bootstrap row as shown below. Use the row class to set the row all the images will appear in, and then use an appropriate column size to get the display you're looking for. Leave the images' code as it was when you inserted them.

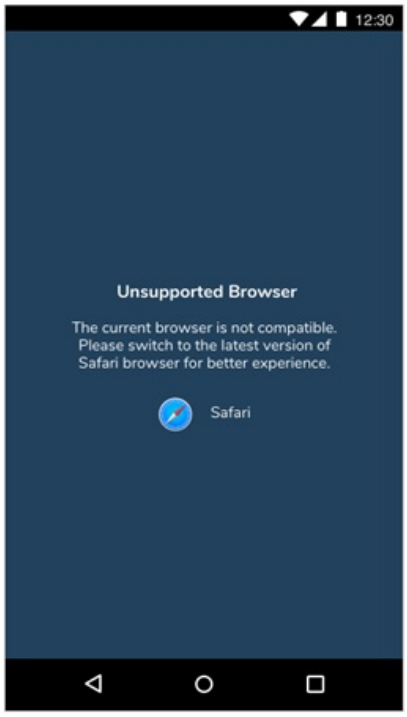
```
<div class="row">
 <div class="col-sm-6">
  <img class="img-responsive fr-fil fr-dib" src="https://dyzz9obi78pm5.cloudfront.net/app/image/id/5e9dee62ad121
 </div>
 <div class="col-sm-6">
  <img class="img-responsive fr-fil fr-dib" src="https://dyzz9obi78pm5.cloudfront.net/app/image/id/5e9dee6aec16
 </div>
</div>
```

4. **Save.**

You can adjust the col-sm-6 to use different numbers to include more images, etc. Bootstrap grid expects a max of 12, so if you have 3 images you could use col-sm-4 instead of 6, for example.

Here's a sample of this layout:



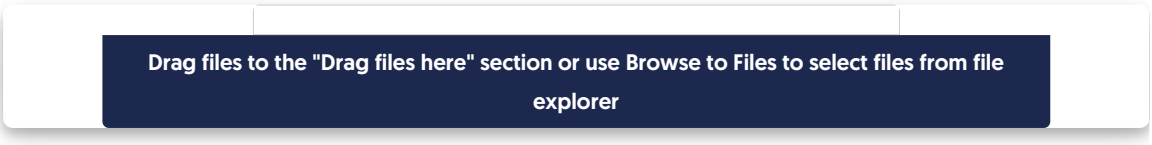


Add files and images directly in File Library

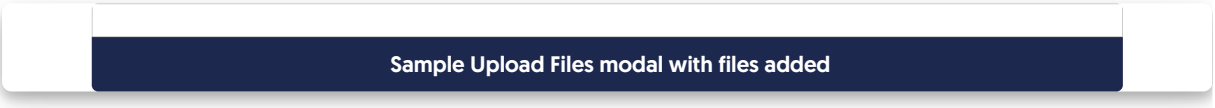
Last Modified on 09/18/2024 11:42 am EDT

To add multiple images, videos, or files at once:

1. Go to **Library > Files.**
2. Select the **+ Add Files** button in the upper left. The **Upload Files** modal opens.
3. Add files by:
    a. Dragging files from your desktop or File Explorer and dropping them in the modal near **Drag files here.**
    b. Selecting **Browse to Files**, selecting the files you want to add, and opening them.



4. Once you've added the files you'd like to upload, select **Upload Files...** to complete the upload.



5. A progress bar displays in the modal while the upload runs. Once upload is complete, the modal closes.

Duplicate files
If you upload a file with the same name as something that already exists in your File Library, KnowledgeOwl appends a random 6 character code on the end, using a-f0-9. This helps enforce uniqueness in the file names and URLs and makes it easier to identify when you may have duplicate files.

Edit and update files

Last Modified on 05/29/2024 5:28 pm EDT

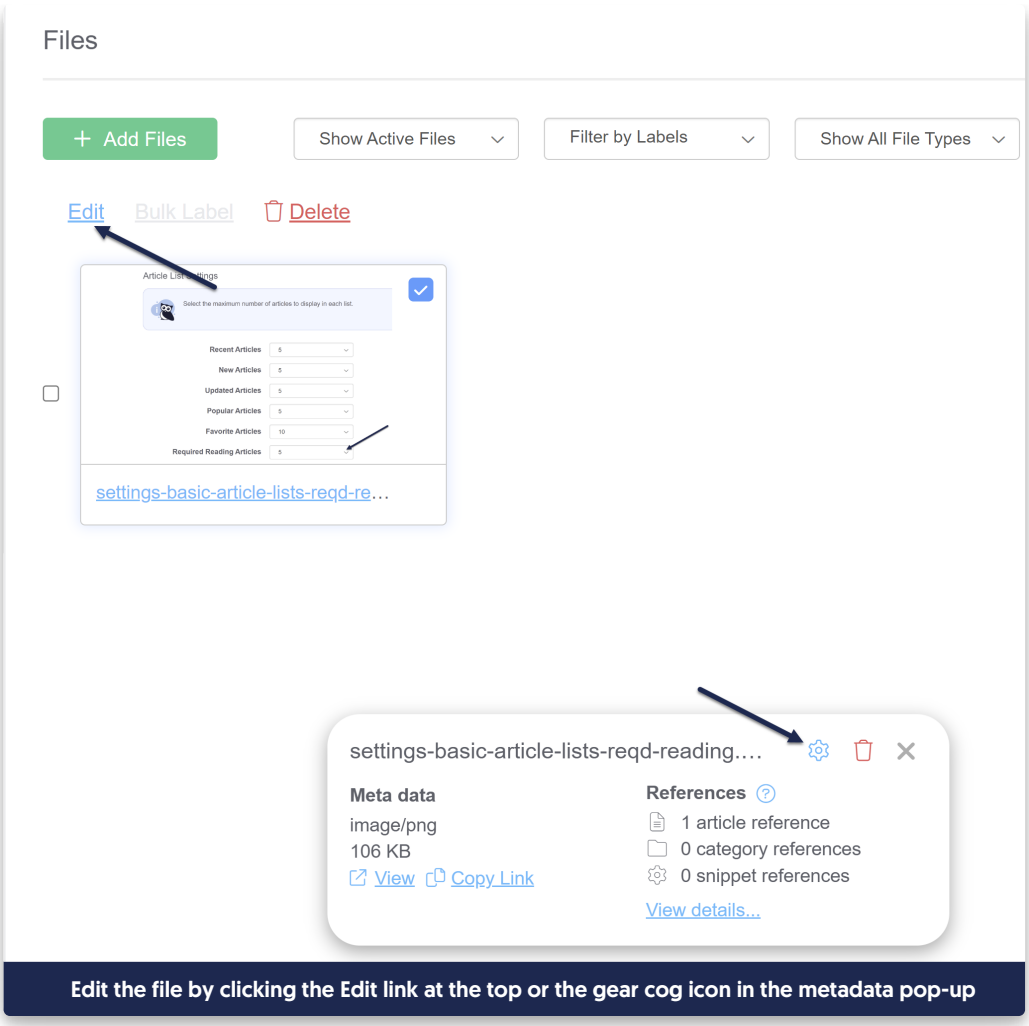
Every file you add to an article in your knowledge base is stored in your File Library. You can access files there to update the name, the file itself, and labels associated with that file.

Renaming files

By default, files are uploaded with a name based on the file you originally uploaded. This is the name that will show up when the file is downloaded/opened.

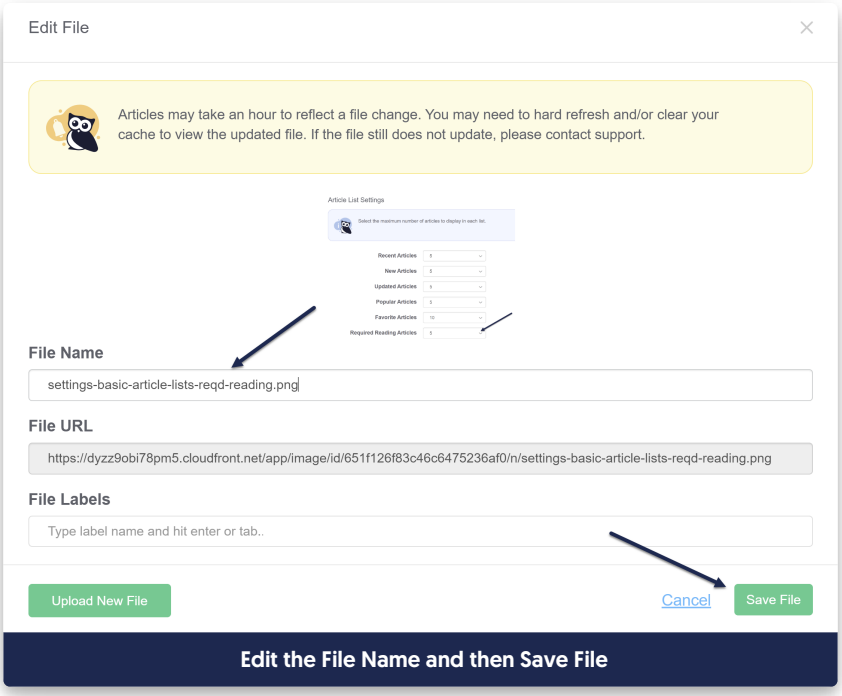
If you'd like to edit this to something more human-friendly or search-friendly:

1. Go to **Library > Files**.
2. Find the file you'd like to edit (use search or the Labels filters if necessary).
3. Click on that file.
4. From here, you can either:
    a. Click the **Edit** link at the top of the page.
    b. Click the gear cog icon in the metadata pop-up at the bottom of the page.



5. **This will open the Edit File pop-up. Edit the File Name to be what you'd like.**

6. **Click the Save File button in the lower right.**



Updating files

Linus is a busy little owl, and he updates a lot of screenshots and articles. Whenever he can, he reuses existing screenshots in the File Library. When it comes time for him to update that screenshot, rather than manually replacing the screenshot in every single article he used it in individually, he updates the existing file in File Library with the new screenshot. This approach has some great advantages:

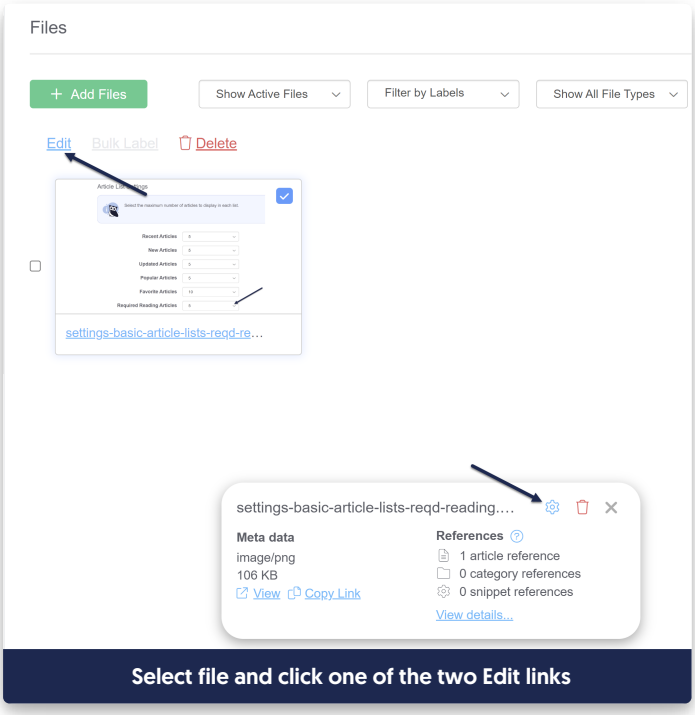
- It's a real time-saver for editors (one update in File Library rather than manually editing a bunch of articles)
- It keeps the File Library from getting bloated with old/outdated/duplicate copies of files
- It guarantees that everywhere the screenshot was used, it's updated to the latest version of the file



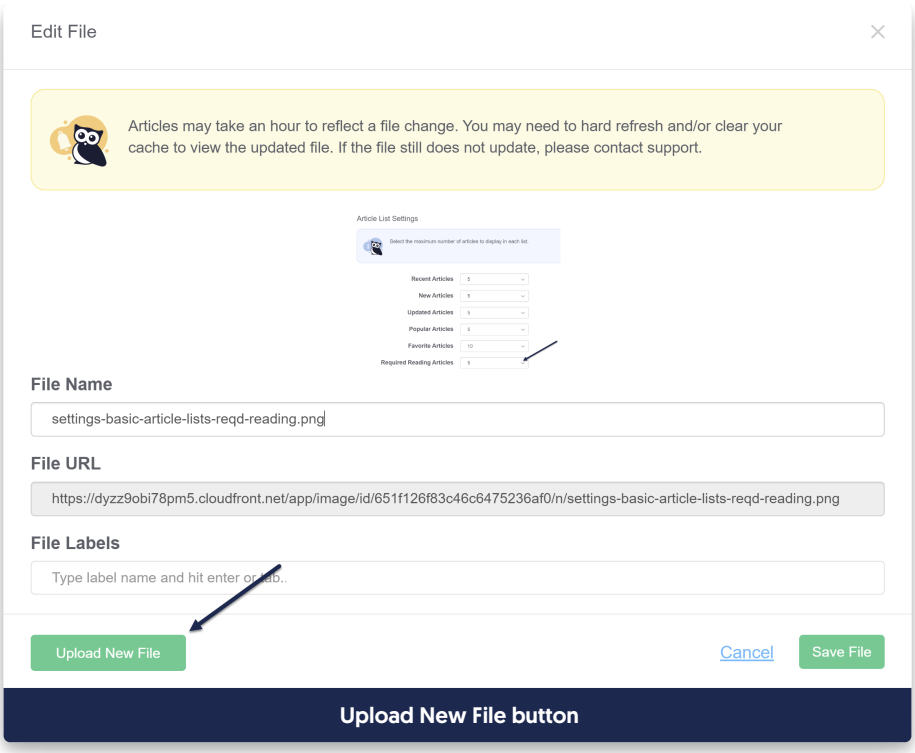
We strongly recommend updating files from the File Library!

To make this kind of update:

1. Go to **Library > Files.**
2. Find the file you'd like to edit (use search or the Labels filters if necessary).
3. Click on that file.
4. Click the **Edit** link just above the file thumbnails or the gear cog icon in the metadata pop-up at the bottom of the screen:

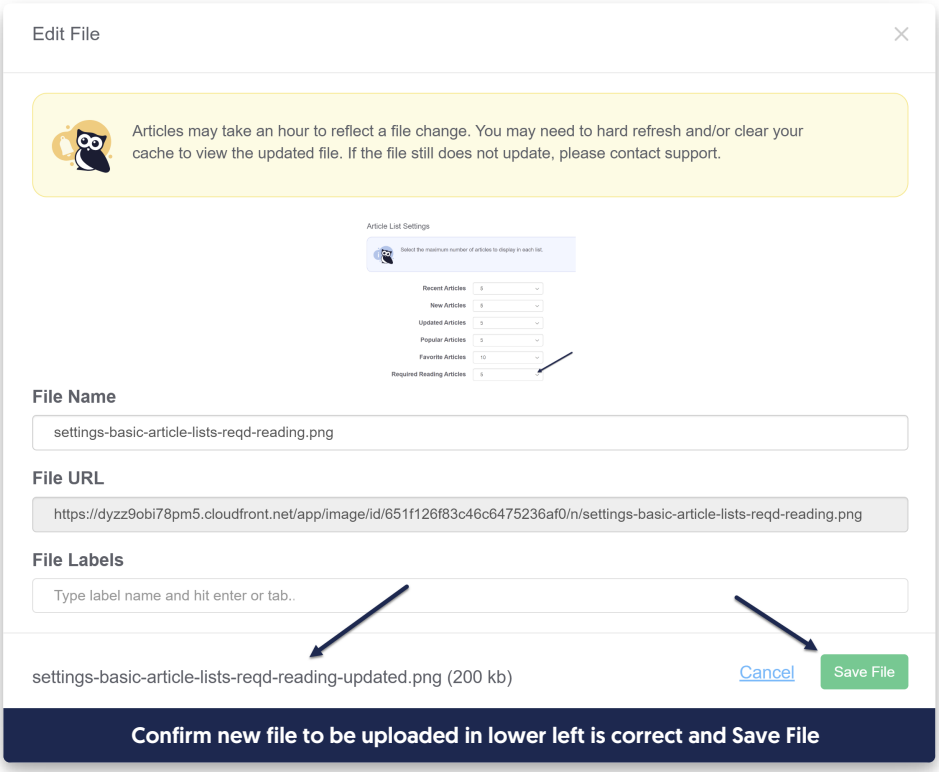


5. This will open the **Edit File** pop-up.
6. Click the **Upload New File** button in the lower left.



7. **Navigate to and select the new version of the file you want to replace the existing one.**

8. **The name of the file you've selected will display in the lower left corner. If this is correct, click the Save File button in the lower right.**



As the warning at the top of the pop-up notes, while most articles will update immediately, some can take up to an hour to update. Contact us if you have issues with a file not updating.

Image upload errors

Last Modified on 05/29/2024 5:28 pm EDT

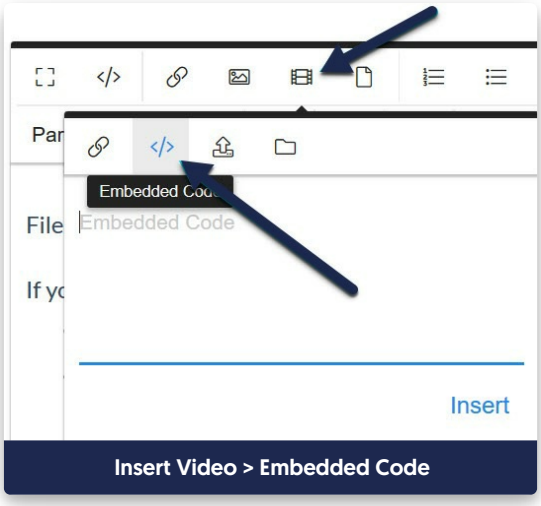
File upload errors are generally caused by one of two things:

1. Files which are too big for KnowledgeOwl storage
2. Files which have been corrupted in some way

Files uploaded to KnowledgeOwl **cannot be bigger than 200MB**. Uploading files larger than 200MB will throw an error.

If you have a file larger than 200MB, we recommend using another hosting provider to store this file. Depending on the tool, you can then either:

- Insert a link to the URL of that file in your article
- Use the hosting provider's embed tools to generate an embed code you can add to your article. For videos, you can use the **Embedded Code** option to paste the embed code from a video hosting platform into your article. See Embed videos for more information.



Insert Video > Embedded Code

If the file you're uploading is under 200MB and it's still throwing an error, the file may be corrupted. Try opening it in the program you created it in, saving a new copy, and uploading that new copy.

Why are some screenshots blurry?

Last Modified on 11/12/2024 3:17 pm EST

Screenshot blurriness can come from a few places in your authoring workflow. Usually those issues lie outside of KnowledgeOwl.

We don't do any processing or resizing on the images you upload to your content.

If you're seeing image blurriness or inconsistent resolution, review the items in this checklist:

- **Are you taking all your screenshots on the same monitor or device?**
  Different screen sizes or screen resolutions can have a big impact on the quality of your screenshot. Pick one monitor or device as your default and always use it.
- **Are you taking all your screenshots in the same browser?**
  Different UI elements can display slightly differently in different browsers. Choose one browser as your default and always use it.
- **Are you taking all your screenshots at the same browser zoom level?**
  If you've zoomed in or zoomed out the browser window, screenshots will have a different resolution. Be sure you're consistently using the same zoom level (the default is 100%, so that's generally a good default for screenshots).
- **Are you using the same tool to take your screenshots?**
  Tools can vary widely in the resolution they capture. Find a tool that works for you and always use the same tool. If necessary, you can try taking the same screenshot with different tools, add them all to an article, and compare to find the best choice! (We use TechSmith's Snagit here at KnowledgeOwl.)
- **If you edit, resize, or otherwise pre-process screenshots in your tool, are you doing so consistently?**
  Just as using different tools can produce inconsistent results, editing images in different ways can also product inconsistency. We've most often seen resolution inconsistency when screenshots are resized in the tool, since you might not resize in the same way every time.

If you're one of a team of writers, be sure your entire team is being consistent with these things, too. Even a small change like screen size or a slightly different editing process can produce different results!



Our recommendations:

- Consistency is key. Establish a standard browser, device, screenshot tool, browser zoom, and editing process to ensure consistent image output.

Image best practice intro

Last Modified on 10/10/2024 12:57 pm EDT

We're often asked for image best practices in using KnowledgeOwl. Below are some general guidelines.

In most cases, we shy away from saying you should "always" do something a specific way, because different approaches have advantages and disadvantages.



Our top recommendation:
Try out some of the recommendations below and find the best practices that work best for you!

File types for screenshots/larger images

Last Modified on 10/10/2024 12:56 pm EDT

First, a quick note about working with images. A lot of guidance around file types will discuss two key factors:

- File overall **size**: If you have a single image on a page, this probably won't matter too much, but if you have twenty, it might matter a great deal.
- Whether a file type has **lossless** or **lossy** compression: this has to do with how detailed the image is/how much it compresses the original file. In general, lossless types are more detailed, but they are also often larger in size.

There are a wide variety of file types for images and pros and cons to using each. (And if you search for answers on this, you'll also find a wide variety of advice!) We're summarizing the things we've found most useful.

The dominant file types for images include:

- .jpeg or .jpg (JPEG)
- .png (PNG)
- .webp (WEBP)

Selecting between these largely comes down to a tradeoff between file size and file compression or loss.

The best choice for you is definitely an "it depends" situation. Let's look at each format in more detail:

- **JPEG** is the default original in online image quality and is still considered a good default for actual photos shared online. Photos in particular can be very bulky in file size, and the JPEG format goes through a "lossy" compression--meaning that as it compresses, it strips out a lot of detail, and therefore lowers the file size.
- **PNG** is usually larger in size than JPEG, but they are more specialized for detailed, high-contrast web graphics because they have a lossless compression--so if you do resize, your display won't look blurrier as a result. They also support transparent backgrounds, a useful feature if you're sharing icons or other oddly-shaped images. (PNG has been our own default for screenshots for years.)
- **WEBP** is a "newer" standard, owned and pushed by Google. On the surface, it combines the best of both worlds: it has both lossless and lossy compression much closer to PNG in behavior, but the sizes are much smaller, comparable to a JPEG. Like PNG, it supports a transparent background. And unlike both JPEG and PNG, it supports animation (which you otherwise would need a GIF or an SVG for). If you're running pages with many images on them, WEBP usually creates faster load times and better performance, which can help with SEO. (We are slowly moving to this standard.)



Our recommendations:

- For actual photos, use .jpeg.
- For screenshots or images used occasionally or in moderation, use .png.
- For image-heavy documentation--especially where SEO performance is critical--use .webp.

Some additional resources if you'd like to explore this more:

- Adobe has a fairly good write-up comparing JPEG vs. PNG
- Mozilla's Image file type and format guide

File types for icons

Last Modified on 10/10/2024 12:56 pm EDT

Icon files are most often available in one of two formats:

- .png (PNG)
- .svg (SVG)

Honestly, either one of these options generally works well for category icons or article thumbnails. They're both fairly lossless, they both work on transparent backgrounds, and they're designed to scale up and down.

Here's a quick side-by-side comparison, though Adobe has a more detailed PNG vs. SVG write-up if you want a deeper dive:

Trait	SVG	PNG
File size	Smaller, quicker loading	Larger, slightly slower to load than .svg
Compression type	Fully lossless	5-20% lossless
Animation	Supported	Not supported
Transparency	Supported	Supported
Accessibility	Written in XML text, rather than code, so screen readers and search engines can analyze them	No underlying text; alt text and other descriptions must be added manually
PDF display	Don't always display consistently in KnowledgeOwl PDFs	Display consistently in KnowledgeOwl PDFs

Really, either will work, but we lean toward .svg for these reasons:

- SVG is slightly smaller and faster to load, so it gives you better page load times. Especially if you're displaying a lot of icons on a page, this matters.
- SVG files will scale down/up more gracefully than PNG, so it shouldn't matter as much what the original dimensions it was generated for were.
- Since icons are often present on every page, the accessibility/text-based scanning makes your general navigation and presentation that much more accessible.

But the big caveat with using SVGs is that they do NOT play well with PDFs. So above all, consider where/how the icon is used. If it will somehow end up in a PDF, don't use an SVG.



Our recommendations:

- For icons displayed online (category icons or article thumbnails and the body of articles that aren't in PDFs), use .svg.
- For icons that might be displayed within PDFs--whether they're used in a header/footer or in the body of the article--use .png.

Resizing images

Last Modified on 10/10/2024 12:55 pm EDT

Our editor gives you several ways to resize images. While they do all work, here are some of the tips we have for working quickly with them:

- When you insert a new image, it gets added with "auto" height and width. This allows for good responsiveness on different device sizes.
- The fastest way to resize is to select an image and then drag one of the corners to resize it.
    - This will automatically set a percentage value in the width, which will keep things responsive. You also don't have to fuss with percentages. But your resizing can be somewhat biased by your screen size!
- You can also select an image and then select the **Change Size** control to add your own size adjustment. This control opens a small pop-up where you can specify a **Width** and **Height** for the image.



The Change Size control in the image menu

If you use this control:

- Use percentages (like 50%) instead of pixels (like 200px). Percentages keep the image more responsive on different screen sizes, which is why we use them in the corner drag control.
- Adjust the **width** only; keep the height set to auto.
- Don't ever set width to be blank/nothing. This will prevent your image from appearing in PDFs.

Our recommendations:

- When in doubt, use the corner drag to resize.
- If you resize using **Change Size**, adjust the width to a percentage; keep the height set to auto.

Accessible images

Last Modified on 10/10/2024 12:56 pm EDT

If your knowledge base needs to be WCAG-compliant, or if you just want to incorporate good accessibility practices into your documentation, images can be a tricky content element.

The easiest best practice we can offer is that alternative text (alt text) is your friend! This text provides a short description to help those with screen readers or other assistive devices so they aren't losing information conveyed by the image.

Official accessibility guidance classifies images as one of seven types. Alternative text entry varies based on the image type.

Here's a quick breakdown of the different image types:

Image type	Image details	Alternative text recommendations
Informative image	Graphically represents concepts and information. Typically pictures, photos, some screenshots, and illustrations.	A short description conveying the essential information presented by the image
Decorative image	Purpose is to add visual decoration to a page, rather than to convey information.	Empty/null alt text (which signifies to assistive devices that they can skip it without losing information)
Functional image	Used as a link or button, like a printer icon.	A description of the functionality of the link or button, rather than a description of the image
Images of text	Displays readable text. Generally a no-no in the world of accessibility.	Contain the same words as the image
Complex images	Graphs, diagrams, or flowcharts	A complete text equivalent of the data or information in the image
Groups of images	Multiple images that convey a single piece of information: this can be things like star ratings where each star is a separate image, or a collection of images	Add the alt text to only one of the images to describe the entire collection; the other images should get null/empty alt text
Image maps	An image divided into selectable regions that allow user interaction (usually the selectable regions are links to other pages/resources)	Add text on the image itself to convey the informational context and on each selectable element to convey the link destination or the action that selecting the link will trigger

For adding alternative text--including how to add the empty/null alt text--refer to Add alternative text to images.

W3C's Web Accessibility Initiative is the ultimate resource on these details; check out their Images Tutorial for far more detailed guidance than we could ever provide; their Tips and Tricks can give you some good guidance on writing alternative text, too.



Our recommendations:

- Don't use an image as the only way to convey information
- Be thoughtful about how you're using images
- Always add alt text for images that are conveying information
- Only use images with text, complex images, groups of images, or image maps if they really are the best way to present information; be thoughtful with your alt text if you do!

Gif and animation usage

Last Modified on 10/10/2024 12:56 pm EDT

Gifs and animations are sometimes a contentious visual asset in knowledge bases (not least of all because there are competing factions on how to pronounce gif--are you a jif or gif supporter?).

Four factors should impact your use of gifs:

1. Accessibility
2. Maintainability
3. Performance
4. Usefulness of conveyed information

Accessibility

Gifs, like other images and visual content, may be used to convey information or for decorative purposes. Evaluate them just as you would other images and use appropriate alternative text. Refer to Accessible images for best practices on visual accessibility and Add alternative text to images for working with alt text.

The one way gifs depart from static images is that looping gifs can be classified as flashing content. In accessibility requirements, you want to avoid flashing content that may present a risk for seizures, physical reactions, and other photoreactive responses.

Broadly speaking, this means you:

- Do not include content that flashes at particular rates and pattern
- Warn users before flashing content is presented, and provide alternative
- Provide mechanisms to switch off animations, unless they are essential (source)

We like the guidance provided by Accessible Web:

> Animated gifs can be accessible if they are set to stop after 5 seconds or if users are presented with a way to pause it, if they have alt text and if they do not contain blinking/flashing.
>
> You should also ask yourself if there is another way that the message can be communicated. Would a still image do? If not, think about providing an alternative or some way that users can forgo the animation or switch to an embedded video.
>
> A useful tool when checking your gifs for flashing may be this Photosensitive Epilepsy Analysis Tool. You want to make sure the animation won't trigger seizures in people who are sensitive to flashing.

If you're using looping gifs, consider something like Only play GIFs while hovering.

Maintainability

Animated gifs can be harder to maintain than static images, especially if the gif is of a user interface that changes frequently. Instead of grabbing a single screenshot, someone must re-create the original action(s) shown in the gif. The longer the gif, the more involved this process becomes.

Performance

One gif on a page--provided it's short--likely won't hurt your page load times or performance. But if you use a gif after every numbered step on a 20-step process, it definitely will.

Usefulness

Last but not least, is a gif the best way to present this information? Would a static image, or a couple static images, convey the same information? Gifs don't have the start/stop control that videos do, so if it's a complex or lengthy process, someone may be stuck watching the gif repeatedly to try to get the information. Make sure that a gif truly is the best way to present the information.

Recommendations



Our recommendations:

- Only use gifs when you are capturing an interaction that cannot be adequately described or shown with static images.
- A gif should supplement your written content, not replace it.
- Always add alt text to your gif, just like an image.
- Test your gifs against tools designed to check for photosensitivity triggers.
- Keep gifs short: always under 10 seconds, ideally no more than 5.
- If you use looping gifs, consider options to limit the number of loops or only play gifs while hovering.

Create consistent screenshots

Last Modified on 11/12/2024 3:17 pm EST

Screenshot blurriness can come from a few places in your authoring workflow. Usually those issues lie outside of KnowledgeOwl.

We don't do any processing or resizing on the images you upload to your content.

If you're seeing image blurriness or inconsistent resolution, review the items in this checklist:

- **Are you taking all your screenshots on the same monitor or device?**
  Different screen sizes or screen resolutions can have a big impact on the quality of your screenshot. Pick one monitor or device as your default and always use it.
- **Are you taking all your screenshots in the same browser?**
  Different UI elements can display slightly differently in different browsers. Choose one browser as your default and always use it.
- **Are you taking all your screenshots at the same browser zoom level?**
  If you've zoomed in or zoomed out the browser window, screenshots will have a different resolution. Be sure you're consistently using the same zoom level (the default is 100%, so that's generally a good default for screenshots).
- **Are you using the same tool to take your screenshots?**
  Tools can vary widely in the resolution they capture. Find a tool that works for you and always use the same tool. If necessary, you can try taking the same screenshot with different tools, add them all to an article, and compare to find the best choice! (We use TechSmith's Snagit here at KnowledgeOwl.)
- **If you edit, resize, or otherwise pre-process screenshots in your tool, are you doing so consistently?**
  Just as using different tools can produce inconsistent results, editing images in different ways can also product inconsistency. We've most often seen resolution inconsistency when screenshots are resized in the tool, since you might not resize in the same way every time.

If you're one of a team of writers, be sure your entire team is being consistent with these things, too. Even a small change like screen size or a slightly different editing process can produce different results!



Our recommendations:

- Consistency is key. Establish a standard browser, device, screenshot tool, browser zoom, and editing process to ensure consistent image output.

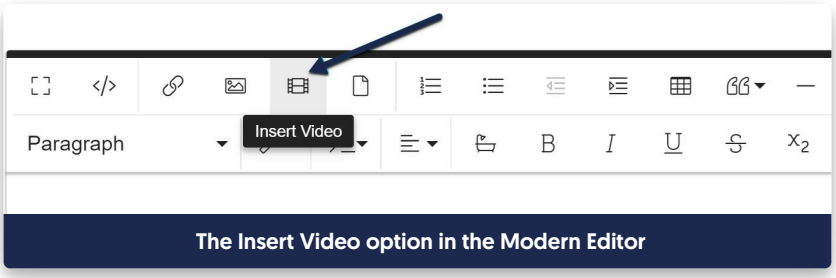
Add videos to your articles

Last Modified on 05/29/2024 5:28 pm EDT

You can quickly and easily embed videos into your articles using the Insert Video option in the Modern editor.

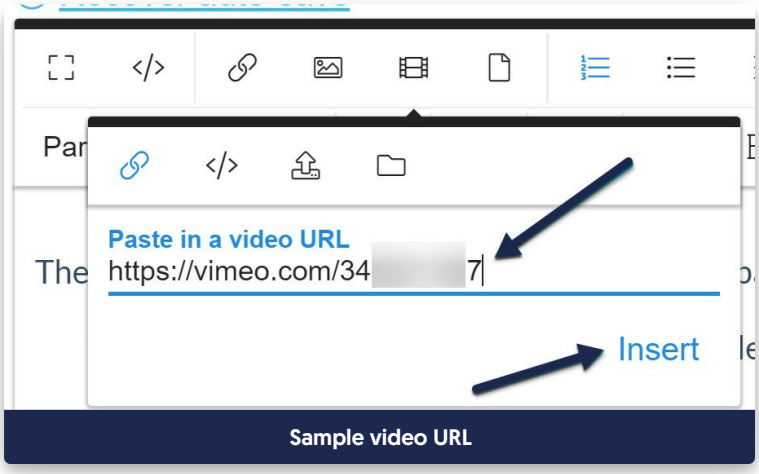
We cap individual file upload size at 200MB. Many longer videos exceed this. For those videos, we recommend hosting on a third party video provider and using the second option here (Embedded Code).

There are four ways to insert videos. For all four, you'll begin the process in the editor by clicking on the **Insert Video** icon in the editor toolbar:



The Insert Video option in the Modern Editor

1. **By URL** (the link icon)
   Use the By URL option to paste in a URL from Youtube, Vimeo, Dailymotion, Yahoo, or Rutube. The editor will automatically embed it for you using that site's player, using whatever defaults exist for the video.
   To use this option:
   a. Click the link icon (first icon) in the Insert Video pop-up.
   b. Paste in the URL to the video.
   c. Click the **Insert** button.



Sample video URL

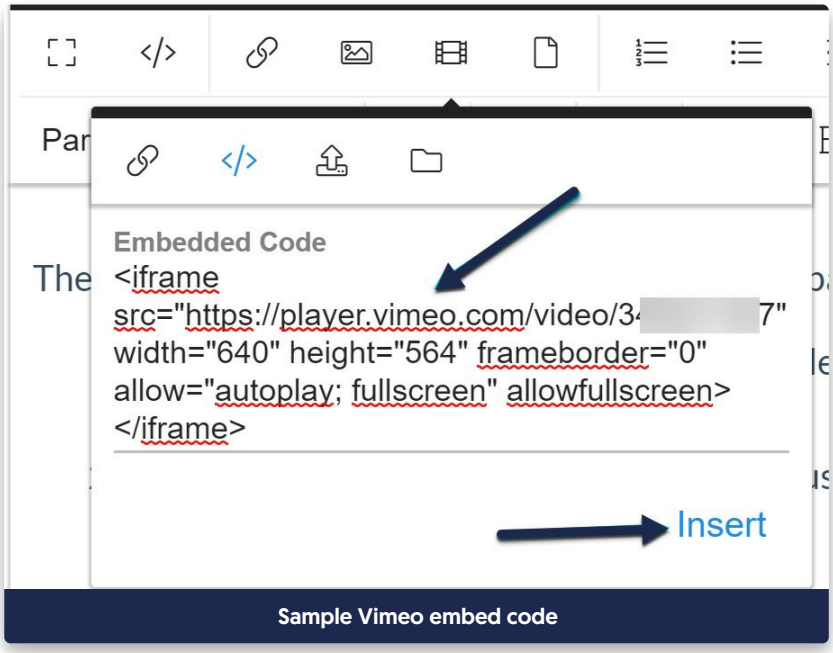
2. **Embedded Code** (the </> icon)
   Most third-party video providers (such as Vimeo, Wistia, YouTube, etc.) will generate embed codes for

their videos. Depending on your video provider, you may have a bit more control with the Embedded Code in how the video displays. By URL uses the default settings for the video; with Embedded Codes, you can sometimes toggle various configuration options.
To use this option:

a. Click the code icon (second icon) in the Insert Video pop-up.

b. Paste in the Embed Code for your video.

c. Click the **Insert** button.



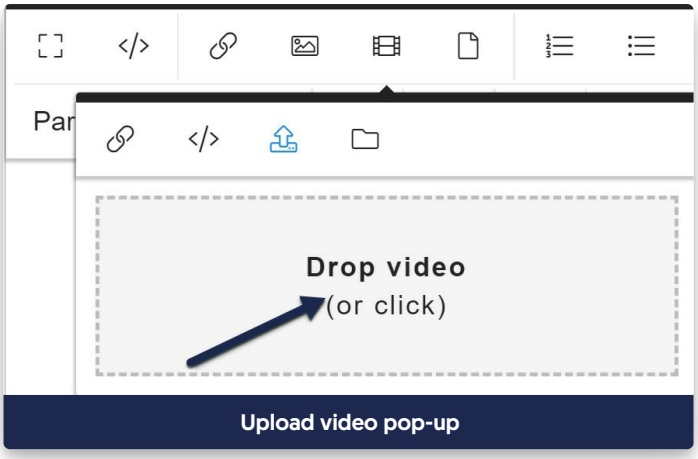
Sample Vimeo embed code

If you're trying to paste Wistia embed codes and having trouble, see Wistia video embeds for more details.

3. **Upload Video** (upload arrow)
Use this option to upload a video file directly from your computer to KnowledgeOwl. File size limit is 200MB. The video will be displayed using an HTML5 video player, which supports MP4, WebM, and Ogg video formats. MP4 is the only file type that works in all major browsers.
To use this option:

a. Click the upload icon (third icon) in the Insert Video pop-up.

b. Drag a video file from your computer into the pop-up **or** click the Drop video area to open a file browser window to locate the file and add it.



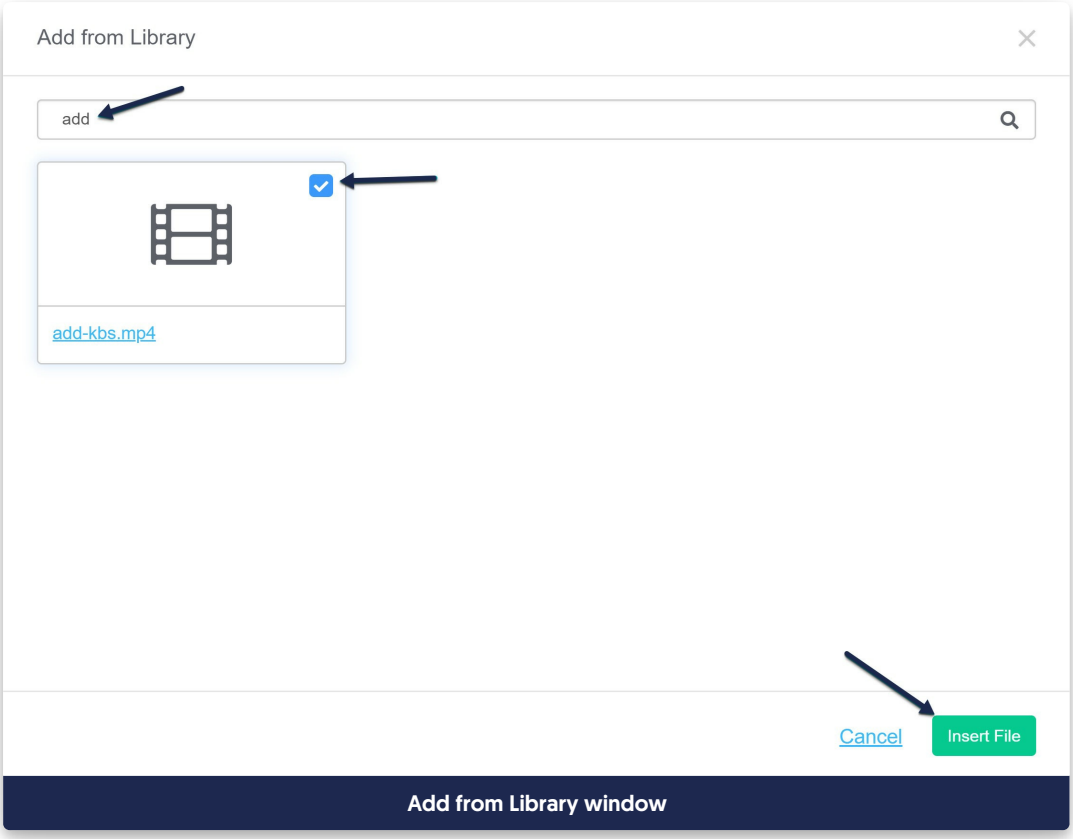
Upload video pop-up

c. Once you've selected or dropped the video you'd like to upload, it will automatically be uploaded and inserted.

4. **Add From Library** (folder icon)
   Use this option to add a video that you've already uploaded to your File Library.
   To use this option:

   a. Click the folder icon (final icon) in the Insert Video pop-up.

   b. This will open an **Add from Library** window.



Add from Library window

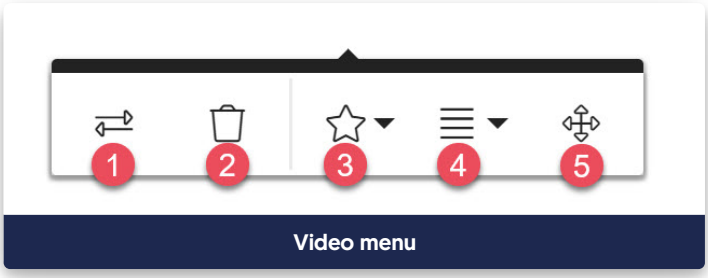
   c. Browse or search for the video you wish to upload.

   d. When you find the correct video, click on the thumbnail for it to select it (this will add a checkmark in the upper right corner).

   e. Click the **Insert File** button to insert the video.

Editing the inserted video

Once your video has been uploaded, you can further tweak how it displays by clicking in the white space next to the video. This will bring up a contextual menu:



You can use this menu to:

1. Replace this video with a different video
2. Remove this video from the article
3. Change the Display option for the video (Inline vs. Break text)
4. Change the Alignment for the video (Left, None, Right)
5. Resize the video

Wistia video embeds

Last Modified on 05/29/2024 5:28 pm EDT

If you're using Wistia as a source for video, we've noticed some quirks with Wistia and wanted to save you some headache by sharing them.

These quirks vary based on whether you're using a Standard embed or a Fallback embed:

Wistia Standard embeds

Wistia's recommends you use a "Standard" embed, which creates an embed code with two scripts and at least one div in it. The embeds look a bit like this:

```
<script src="https://fast.wistia.com/embed/medias/j38ihh83m5.jsonp" async></script>
<script src="https://fast.wistia.com/assets/external/E-v1.js" async></script>
<div class="wistia_embed wistia_async_j38ihh83m5" style="height:349px;width:620px"> </div>
```

There are two basic quirks with this type of embed in KnowledgeOwl:

- These embeds cannot be added using the standard **Insert Video > Embedded Code** workflow (they must be added in Code View)
- Once added, these embeds won't show a thumbnail or placeholder in the editor itself, but they will show in Preview or in the Published version of the article

We discuss these more below.

How to add a Standard Wistia embed code

If you're using a Standard Wistia embed code, you cannot add it to an article using Insert Video > Embedded Code.

Our Insert Video Embedded Code functionality expects an iframe only, and since it doesn't know what to do with the scripts, it won't complete the insert.

If you're using this embed code type, instead of using the Insert Video option:

1. In Wistia, copy the Standard embed code.
2. In the KnowledgeOwl editor, get your cursor to the place you'd like to add the video.
3. Use the </> button in the upper left to open Code View.



4. Paste your embed code by using Ctrl + V or right-clicking and selecting Paste.



5. **Save** your changes.

Showing a Standard embedded Wistia video in the editor

Off the shelf, once you add a Standard Wistia embed code, the editor actually won't show anything. Why? Because the thumbnail and video player depend on the Wistia scripts running, and our editor won't allow those scripts to run. If you click where you pasted in the code, you'll see "Div" is displayed in the upper left.

You can see the video by Previewing the article, or by saving it and viewing the published article.

While we can't force these scripts to run to show the thumbnail, you can add some custom CSS to create a visual signal that a video's been uploaded. We like to use a background color for the video player div and a video icon, but the simpler approach is just to use the background color. See below for both sets of steps:

Adding a color to the video placeholder in the editor

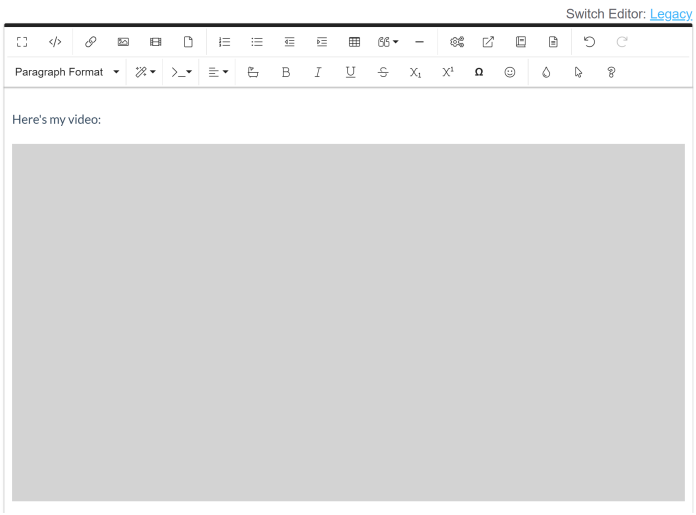
This will allow you to set a color for the video placeholder in the editor only. To start, you'll need to know what color you'd like to use (we use a light grey). Then:

1. Go to **Settings > Style**.
2. Below the preview pane, be sure **Custom CSS** selected.
3. Copy this code and paste it into that pane:

```
/* Add background color to Wistia Standard placeholder in Editor */
.fr-view.hg-article-body .wistia_responsive_wrapper,
.cke_editable .wistia_responsive_wrapper {
    background-color: #d3d3d3;
}
```

4. If you'd like to use a different background color, change the hex used for background-color.
5. **Save** your changes.

Once saved, you'll see the background-color you selected applied to the div placeholder for the videos in both Modern and Legacy editors:



Adding a color and icon to the video placeholder in the editor

For a slightly fancier treatment, we add a video icon to the File Library and include that as a background image. To do something similar:

1. Save this video camera icon to your computer: video-solid.png
2. Go to **Library > Files**.
3. Click **+ Add Files** and upload the icon there.
4. Once it's uploaded, select the file and copy the URL for it. See Find a file's URL for more details.
5. Now go to **Settings > Style**.
6. Below the preview pane, be sure **Custom CSS** selected.
7. Copy this code and paste it into that pane:

```
/* Add background color and video icon to Wistia Standard placeholder in Editor */
.fr-view.hg-article-body .wistia_responsive_wrapper,
.cke_editable .wistia_responsive_wrapper {
    background-color: #d3d3d3;
    background-image: url("my-url/video-solid.png");
    background-repeat: no-repeat;
    background-position: center;
}
```

8. Replace "my-url/video-solid.png" with the URL of the file you uploaded in Step 3. It should remain in quotation marks.
9. If you'd like to use a different background color, change the hex used for background-color.
10. **Save** your changes.

Your code should look something like this:

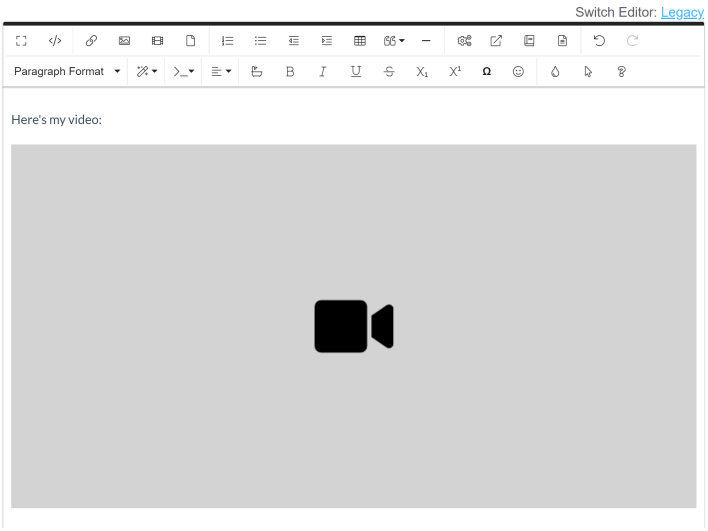
Custom CSS | Custom HTML | Custom <head>

Custom CSS

```
}

/* Add background color and video icon to Wistia Standard placeholder in Editor */
.fr-view.hg-article-body .wistia_responsive_wrapper,
.cke_editable .wistia_responsive_wrapper {
    background-color: #d3d3d3;
    background-image:
url("https://d383cql5uq169w.cloudfront.net/app/image/pid/[redacted]/id/[redacted]/n
/video-solid.png");
    background-repeat: no-repeat;
    background-position: center;
}
```

Once saved, you'll see the background-color and graphic you selected applied to the div placeholder for the videos in both Modern and Legacy editors:



Wistia Fallback embeds

Wistia Fallback embeds work a bit better in the KnowledgeOwl editor. These embed codes do generate an iframe, so you'll get a thumbnail/preview in the editor. They generally look a bit like this:

```
<iframe src="https://fast.wistia.net/embed/iframe/avk9twrrbn" allowtransparency="true" frameborder="0" scrolling="n
<script src="https://fast.wistia.net/assets/external/E-v1.js" async></script>
```

The main quirk with these embeds is the script file referenced in them.

If you use Insert Video > Embedded Code and try to paste both the iframe and the script code in, the insert won't complete, because this insert doesn't support scripts.

If you use Insert Video > Embedded Code and paste the iframe portion of the embed code in by itself, the insert will succeed and you'll see the video thumbnail in the Editor.

However, according to Wistia's documentation, using the iframe by itself bypasses some of the SEO benefits

provided by the Standard embed. The script file included in the embed code basically includes all of those SEO benefits.

There are two ways you can include this functionality:

Add the full Fallback embed code in Code View

Instead of using **Insert Video > Embedded Code:**

1. In Wistia, copy the Fallback embed code, including the iframe and script code.
2. In the KnowledgeOwl editor, get your cursor to the place you'd like to add the video.
3. Use the </> button in the upper left to open Code View.



4. Paste the embed code with the full iframe and script code by using Ctrl + V or right-clicking and selecting Paste.
5. **Save** your changes.

Add the iframe code only and add a snippet containing the script

If Code View is not a good workflow for your content editors/creators, we recommend:

- Creating a snippet that contains the Wistia smart player script.
- Using the Insert Video > Embedded Code to add the iframe embed code only.
- Adding the Wistia smart player snippet to the article.

This is a little more setup work initially, but it means the insert process can happen fully in the WYSIWYG portion of our editor, rather than Code View.

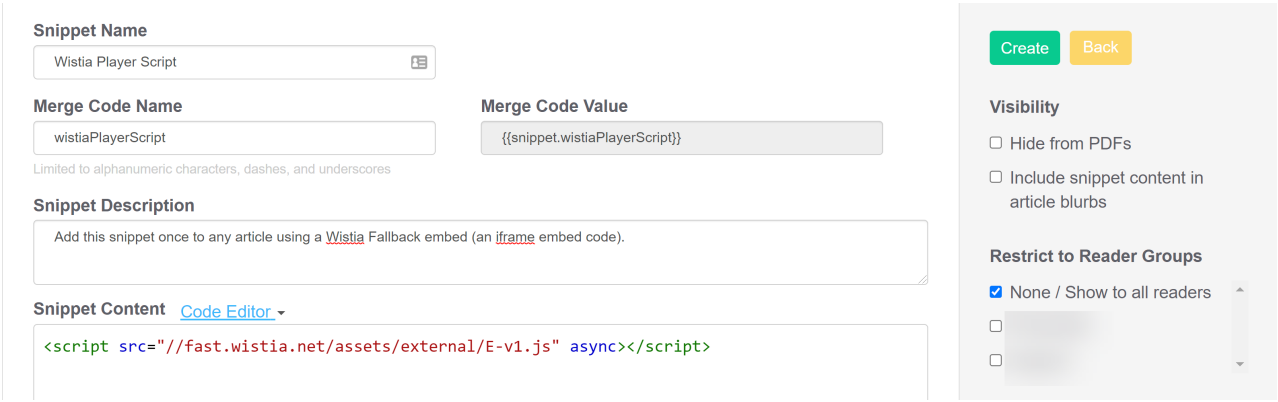
First, set up the snippet with the Wistia smart player script:

1. In KnowledgeOwl, go to **Library > Snippets**.
2. Create a new snippet. (See Creating a snippet for the full set of steps.) We recommend using "Wistia script" or something similar as the name.
3. Copy the Wistia Smart Player script from one of your embed codes (or from their documentation here: https://wistia.com/support/integrations/hubspot#make-sure-e-v1-js-is-on-the-page). At the time we wrote this page, the code looked like this:

```
<script src="https://fast.wistia.net/assets/external/E-v1.js" async></script>
```

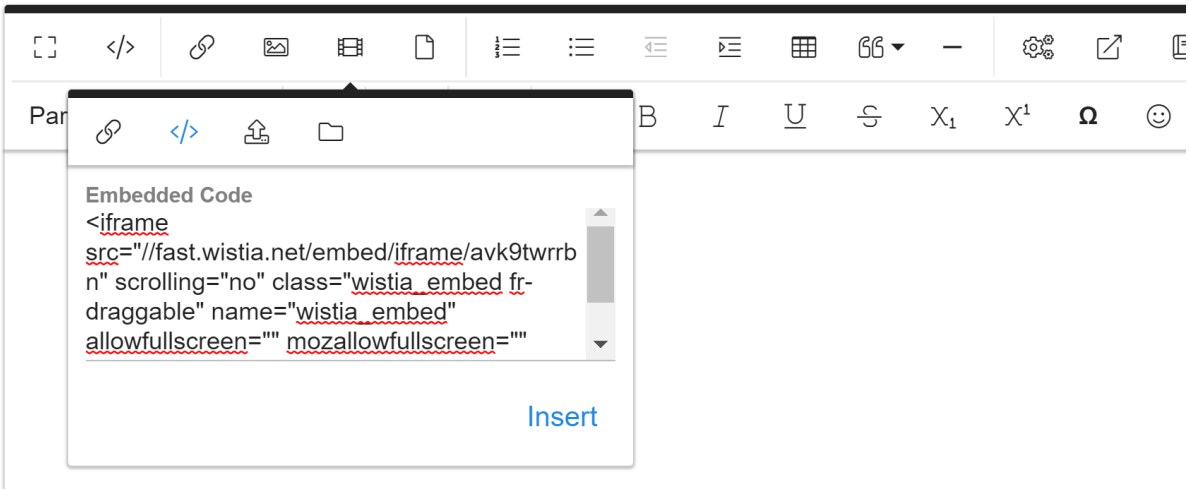
4. In your new snippet in KnowledgeOwl, click the Code Editor button.
5. Paste in the script HTML you copied in step 3.
6. **Create** your snippet.

Your snippet should look something like this:



With the snippet created, you'd then follow this process to add a Wistia Fallback embed to any article:

1. **In Wistia, copy the iframe portion of the Fallback embed only. For example:**
2. **In the KnowledgeOwl editor, select Insert Video.**
3. **Use the Embedded Code option.**
4. **Paste your iframe code in, and select Insert.**



5. **Anywhere in the article, select Insert Snippet (two gear cogs icon) from the editor taskbar.**



The Insert Snippet editor control

6. **Search for your Wistia Player Script snippet (or whatever you called it).**
7. **Insert that snippet.**
8. **Save your article.**

The iframe will upload properly through Insert Video, and the snippet will ensure you get the full SEO benefits.



If you're including multiple Wistia embeds in a single article, you only need to include that Wistia player snippet once.

Add videos in bulk

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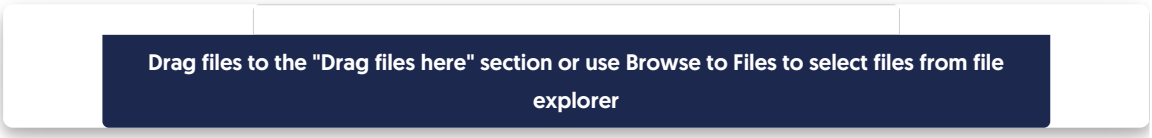
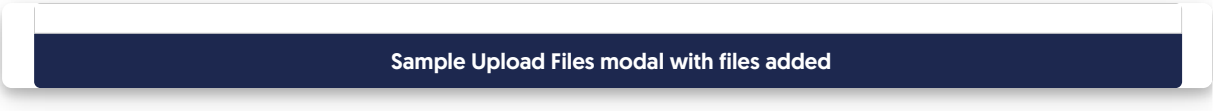
To add multiple images, videos, or files at once:

1. Go to **Library > Files.**
2. Select the **+ Add Files** button in the upper left. The **Upload Files** modal opens.
3. Add files by:
    a. Dragging files from your desktop or File Explorer and dropping them in the modal near **Drag files here.**
    b. Selecting **Browse to Files**, selecting the files you want to add, and opening them.



4. Once you've added the files you'd like to upload, select **Upload Files...** to complete the upload.



5. A progress bar displays in the modal while the upload runs. Once upload is complete, the modal closes.

Duplicate files
If you upload a file with the same name as something that already exists in your File Library, KnowledgeOwl appends a random 6 character code on the end, using a-f0-9. This helps enforce uniqueness in the file names and URLs and makes it easier to identify when you may have duplicate files.

Video upload errors

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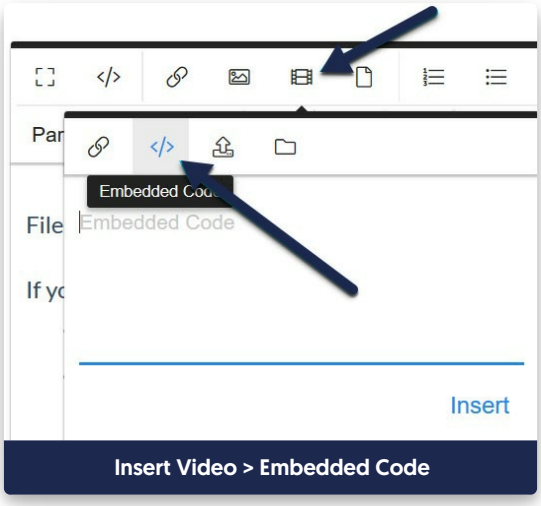
File upload errors are generally caused by one of two things:

1. Files which are too big for KnowledgeOwl storage
2. Files which have been corrupted in some way

Files uploaded to KnowledgeOwl **cannot be bigger than 200MB**. Uploading files larger than 200MB will throw an error.

If you have a file larger than 200MB, we recommend using another hosting provider to store this file. Depending on the tool, you can then either:

- Insert a link to the URL of that file in your article
- Use the hosting provider's embed tools to generate an embed code you can add to your article. For videos, you can use the **Embedded Code** option to paste the embed code from a video hosting platform into your article. See Embed videos for more information.



Insert Video > Embedded Code

If the file you're uploading is under 200MB and it's still throwing an error, the file may be corrupted. Try opening it in the program you created it in, saving a new copy, and uploading that new copy.

Edit and update videos

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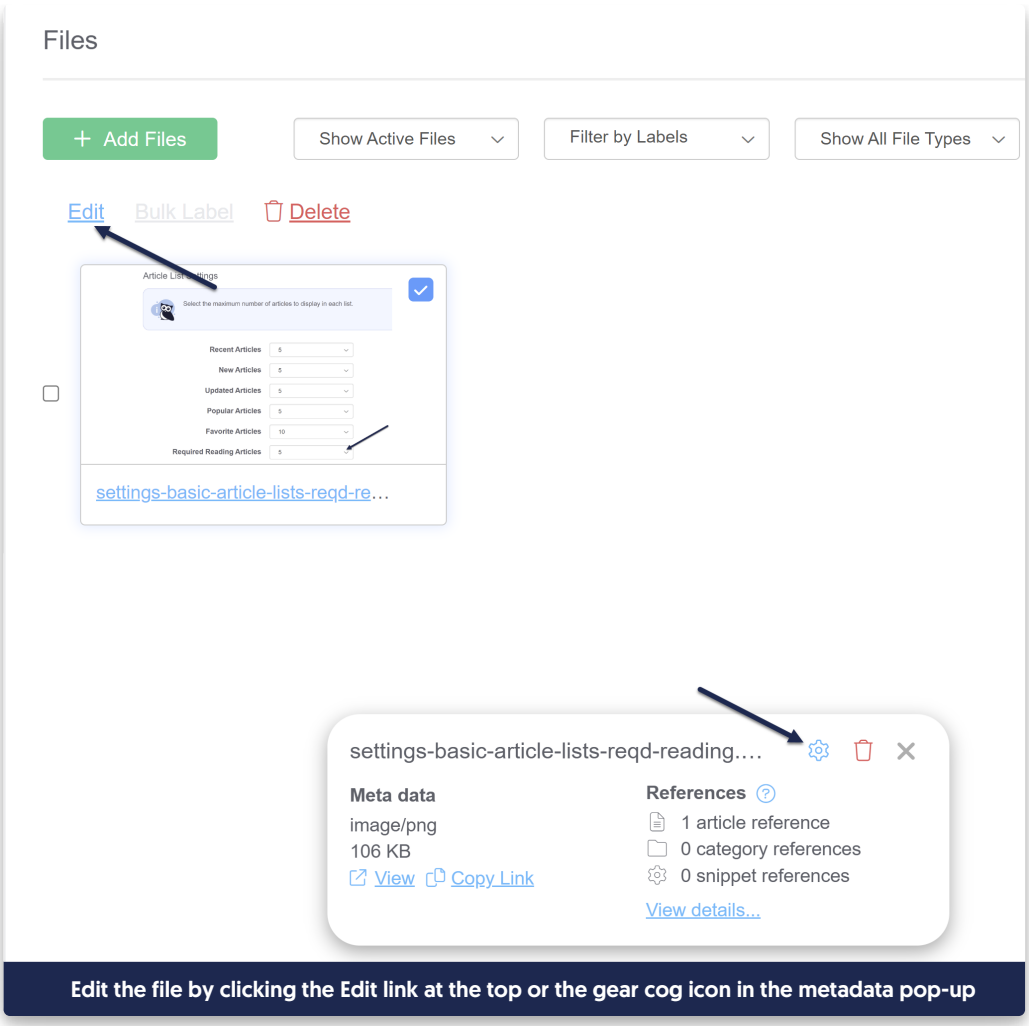
Every file you add to an article in your knowledge base is stored in your File Library. You can access files there to update the name, the file itself, and labels associated with that file.

Renaming files

By default, files are uploaded with a name based on the file you originally uploaded. This is the name that will show up when the file is downloaded/opened.

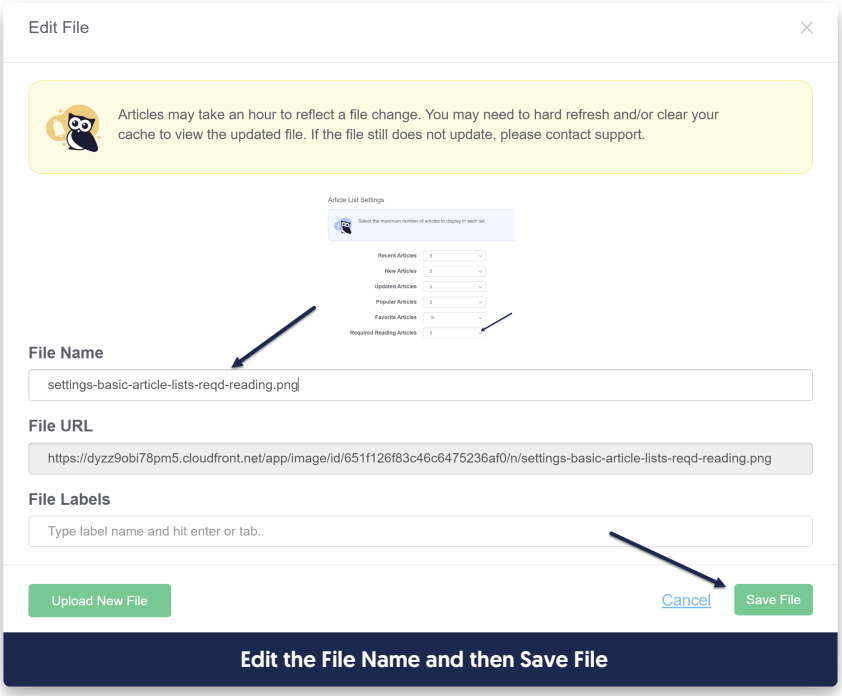
If you'd like to edit this to something more human-friendly or search-friendly:

1. Go to **Library > Files**.
2. Find the file you'd like to edit (use search or the Labels filters if necessary).
3. Click on that file.
4. From here, you can either:
    a. Click the **Edit** link at the top of the page.
    b. Click the gear cog icon in the metadata pop-up at the bottom of the page.



5. This will open the **Edit File** pop-up. Edit the **File Name** to be what you'd like.

6. Click the **Save File** button in the lower right.



Updating files

Linus is a busy little owl, and he updates a lot of screenshots and articles. Whenever he can, he reuses existing screenshots in the File Library. When it comes time for him to update that screenshot, rather than manually replacing the screenshot in every single article he used it in individually, he updates the existing file in File Library with the new screenshot. This approach has some great advantages:

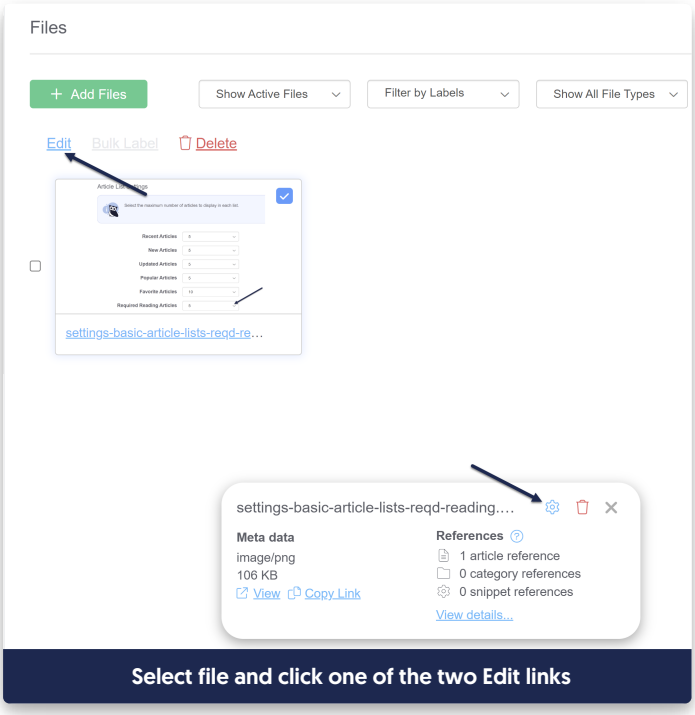
- It's a real time-saver for editors (one update in File Library rather than manually editing a bunch of articles)
- It keeps the File Library from getting bloated with old/outdated/duplicate copies of files
- It guarantees that everywhere the screenshot was used, it's updated to the latest version of the file



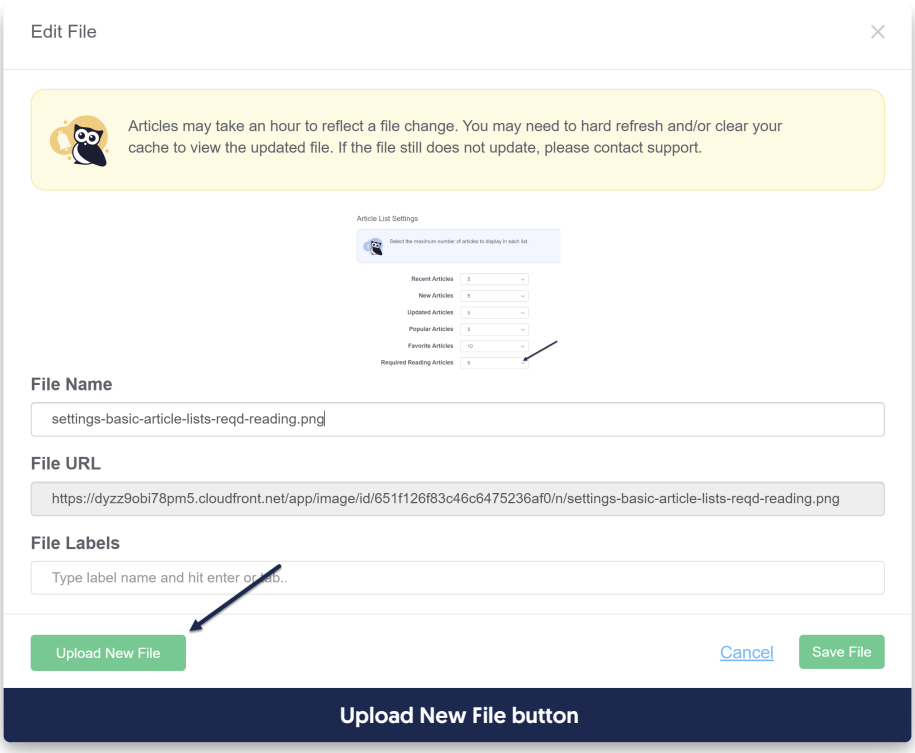
We strongly recommend updating files from the File Library!

To make this kind of update:

1. Go to **Library > Files.**
2. Find the file you'd like to edit (use search or the Labels filters if necessary).
3. Click on that file.
4. Click the **Edit** link just above the file thumbnails or the gear cog icon in the metadata pop-up at the bottom of the screen:

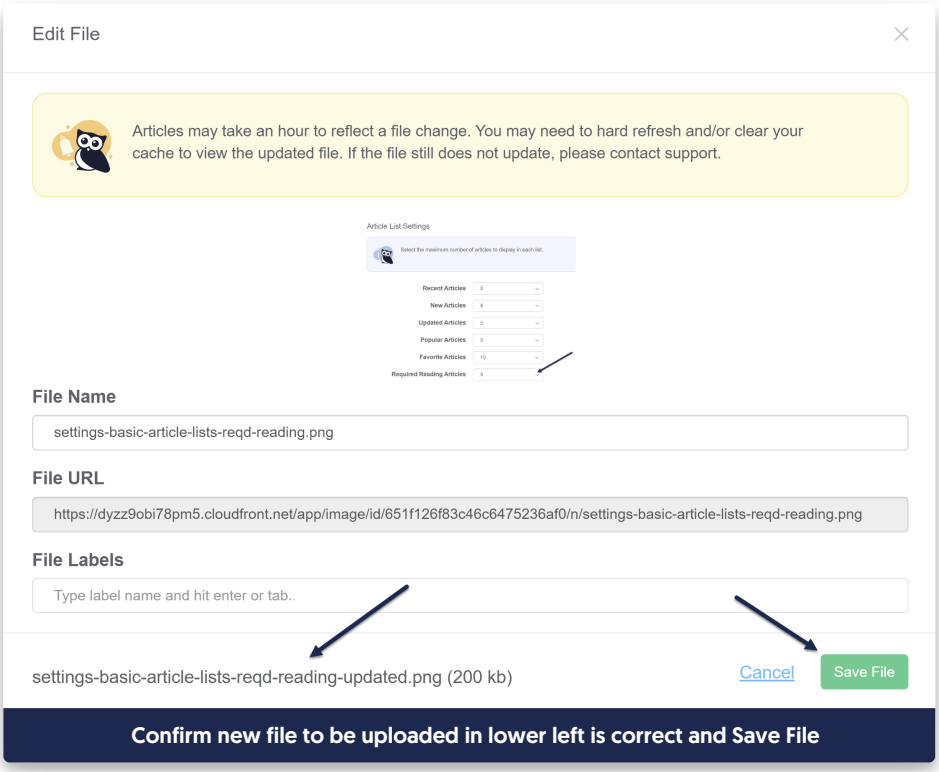


5. This will open the **Edit File** pop-up.
6. Click the **Upload New File** button in the lower left.



7. **Navigate to and select the new version of the file you want to replace the existing one.**

8. **The name of the file you've selected will display in the lower left corner. If this is correct, click the Save File button in the lower right.**



As the warning at the top of the pop-up notes, while most articles will update immediately, some can take up to an hour to update. Contact us if you have issues with a file not updating.

Add files to articles: Modern Editor

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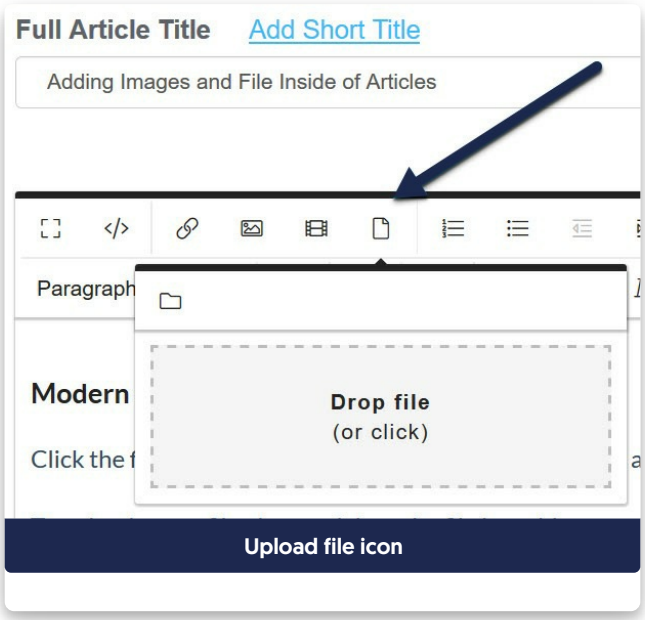
Images, screenshots, and sample files can add examples and detail to your documentation. The process of adding files and images to articles differs a little between the Modern Editor and the Legacy Editor. Here, we walk through the process in Modern Editor.

Files added using this method will display a hyperlink to the file. In most cases, clicking that hyperlink will prompt the reader to download the file to open it. For example, here we've inserted a link to a PDF example file: Example-Article.pdf .

If you'd like to display the contents of a file directly in KnowledgeOwl without this download process, see Display Microsoft Office OneDrive files in articles, Display Microsoft Office file in articles, or Display PDF file in articles for more details!

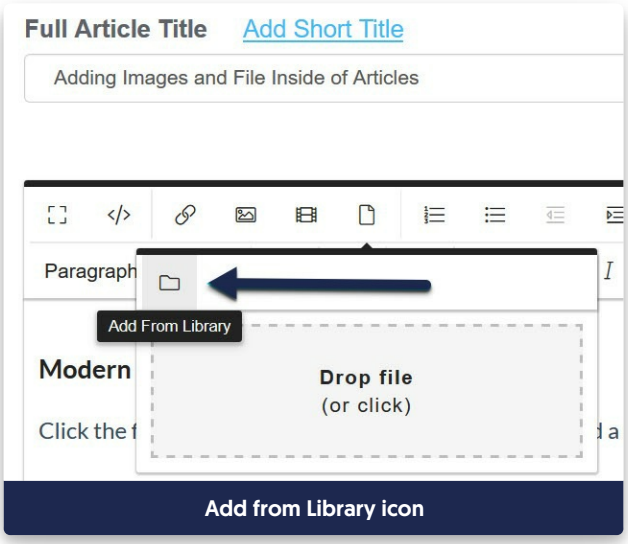
To add a file to an article within the Modern Editor:

1. Select the **Upload File** icon.



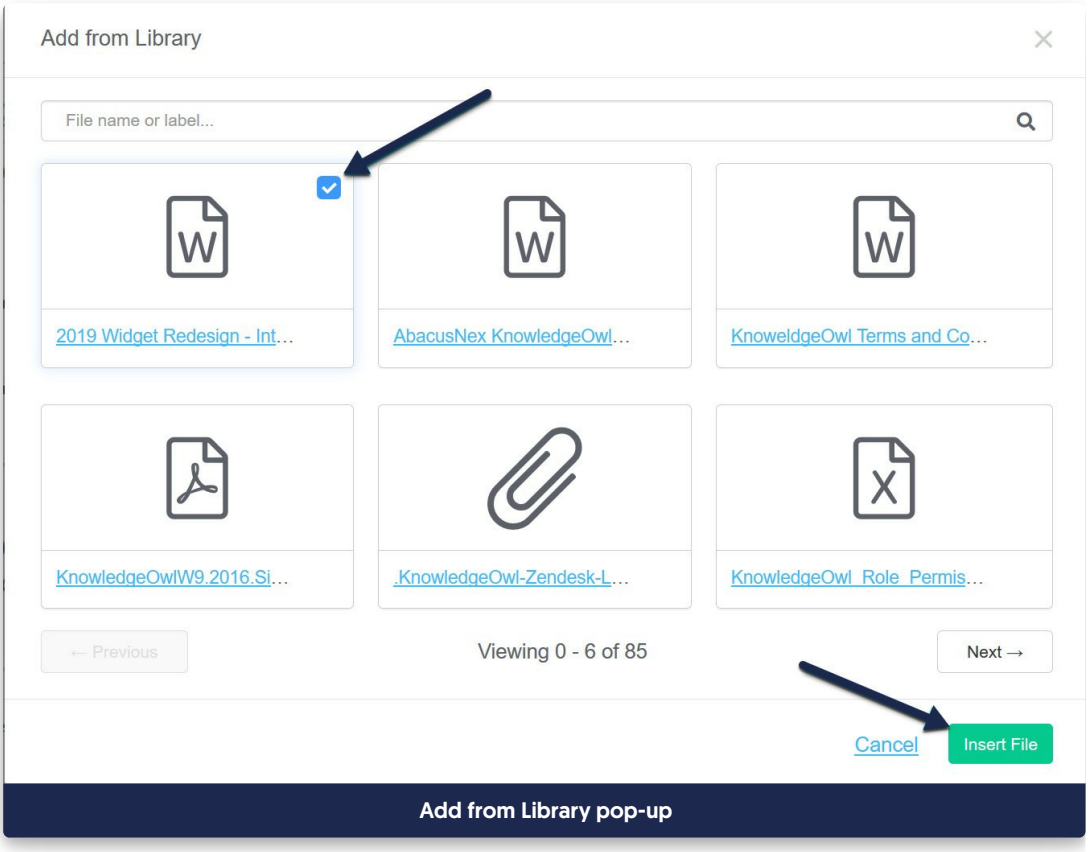
2. You can choose to upload a new file or insert an existing file from your File Library.
    a. To upload a new file:
        i. You can click in the Drop file box to browse to a file for upload. Once you select the file for upload, it will be uploaded and inserted.
        ii. Drag and drop the file into this pop-up.
    b. To add an existing file from your library:

i. Select the folder icon to **Add from library.**



ii. This will open a pop-up where you can search for files, with the most recent files first. You search by part of the file name, browse through the pages, or search for a file label.

iii. Select the image you want to add, then select **Insert File.**



Add files to articles: Legacy Editor

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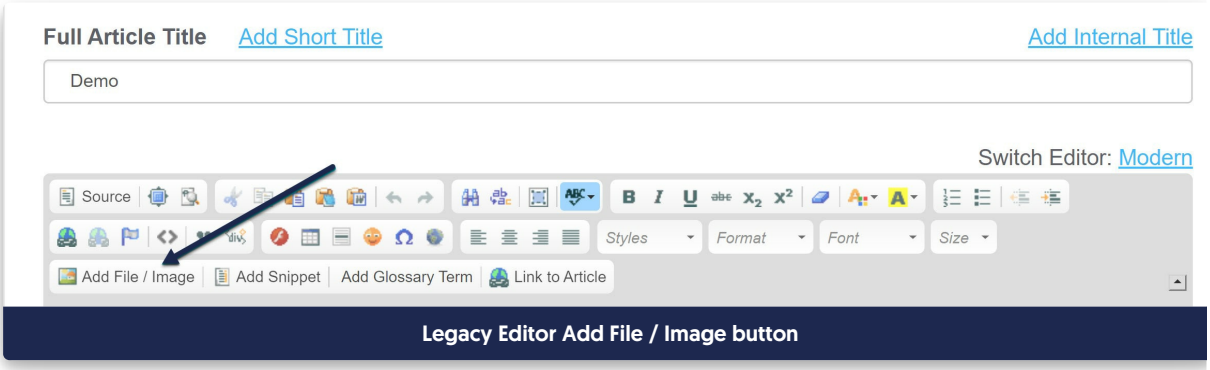
Images, screenshots, and sample files can add examples and detail to your documentation. The process of adding files and images to articles differs a little between the Modern Editor and the Legacy Editor. Here, we walk through adding a file in the Legacy Editor.

Files added using this method will display a hyperlink to the file. In most cases, clicking that hyperlink will prompt the reader to download the file to open it. For example, here we've inserted a link to a PDF example file: Example-Article.pdf .

If you'd like to display the contents of a file directly in KnowledgeOwl without this download process, see Display Microsoft Office OneDrive files in articles, Display Microsoft Office file in articles, or Display PDF file in articles for more details!

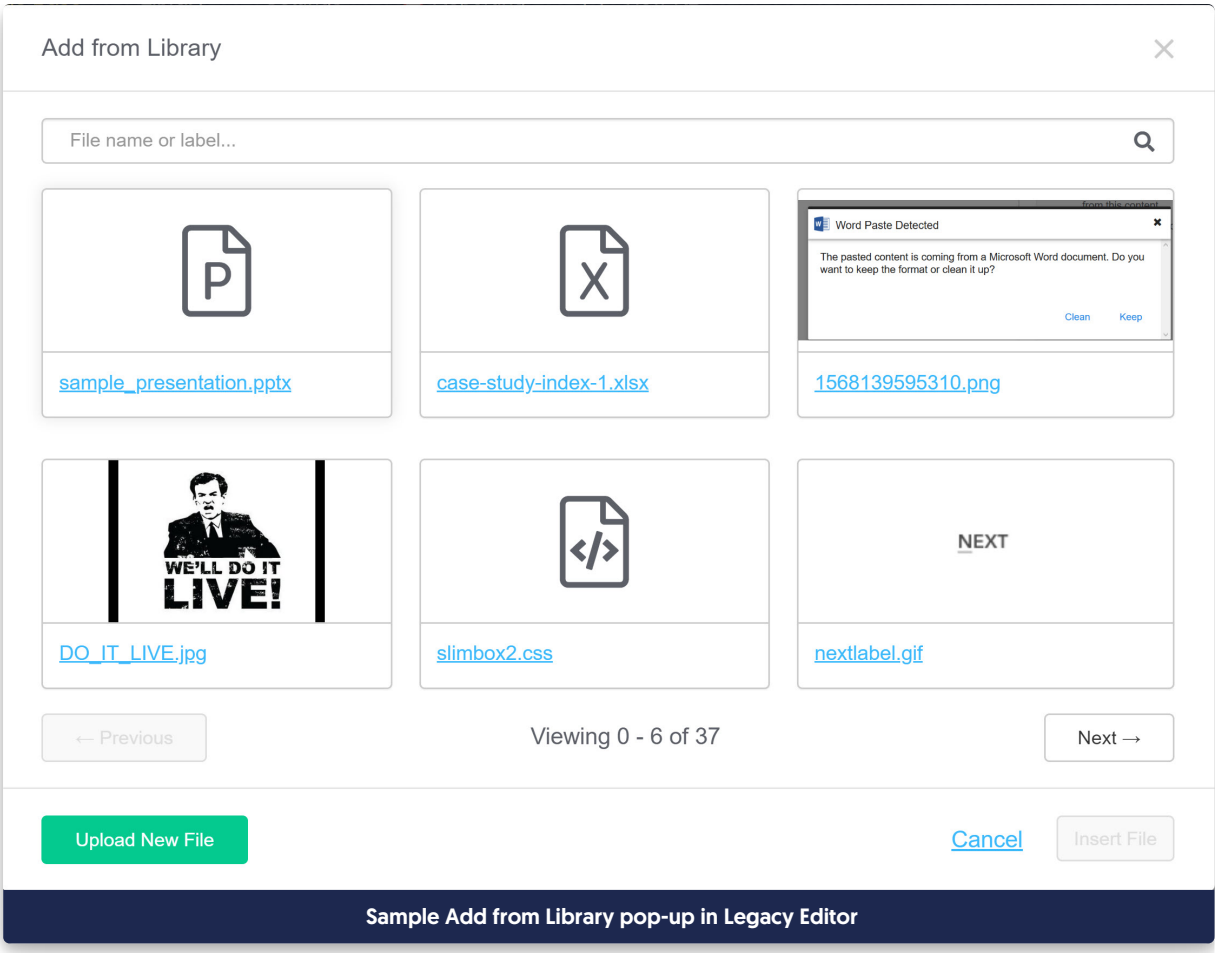
To add images or files into your articles using our Legacy editor:

1. Open your article in edit mode.
2. Click on the **Add File / Image** button near the top.



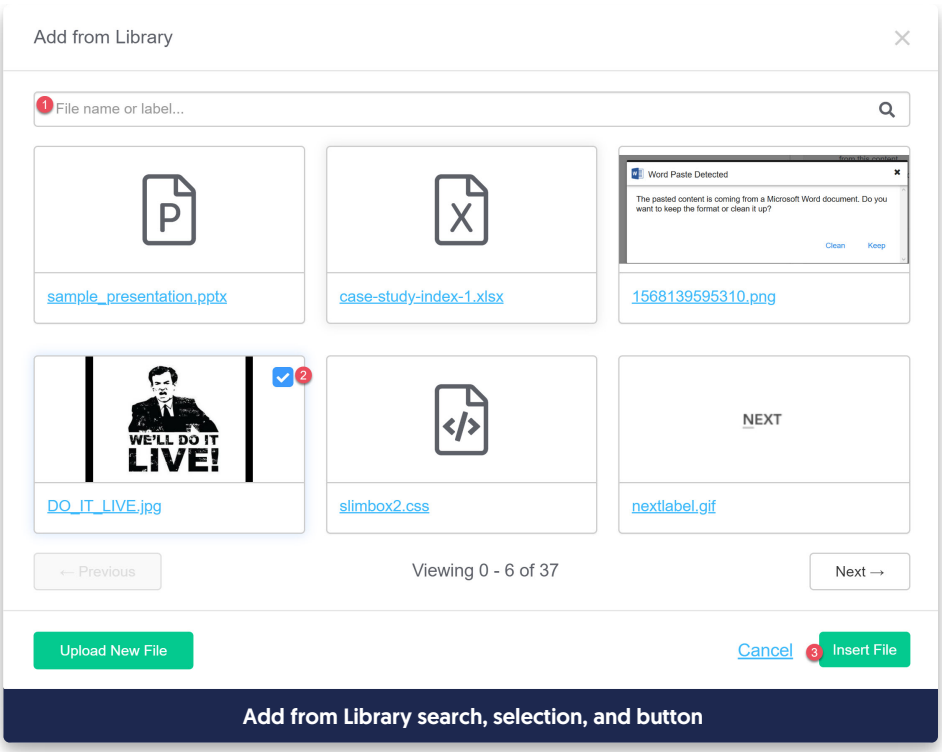
Legacy Editor Add File / Image button

3. This will open the **Add from Library** pop-up, displaying the most recent files first.



Sample Add from Library pop-up in Legacy Editor

4. **To use an existing file in the library:**
    a. **If necessary, use the search bar at the top to search for the file you want to add.**
    b. **Click on the file or image to select it.**
    c. **Click the Insert File button to insert the file into your article.**

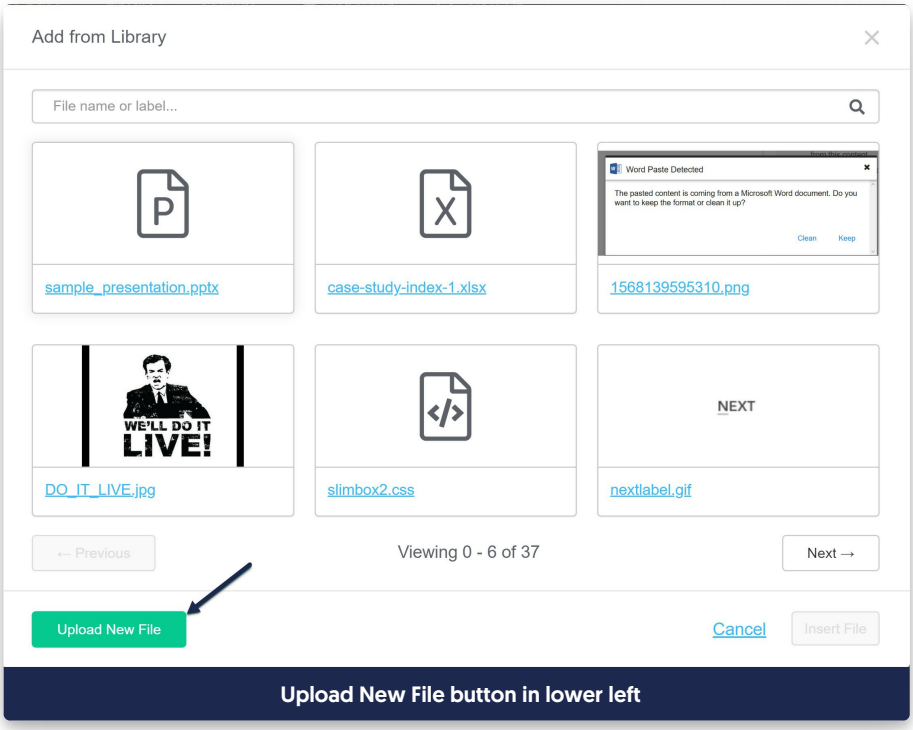


Add from Library search, selection, and button

d. Select **Save** once you've added the files or images you want.

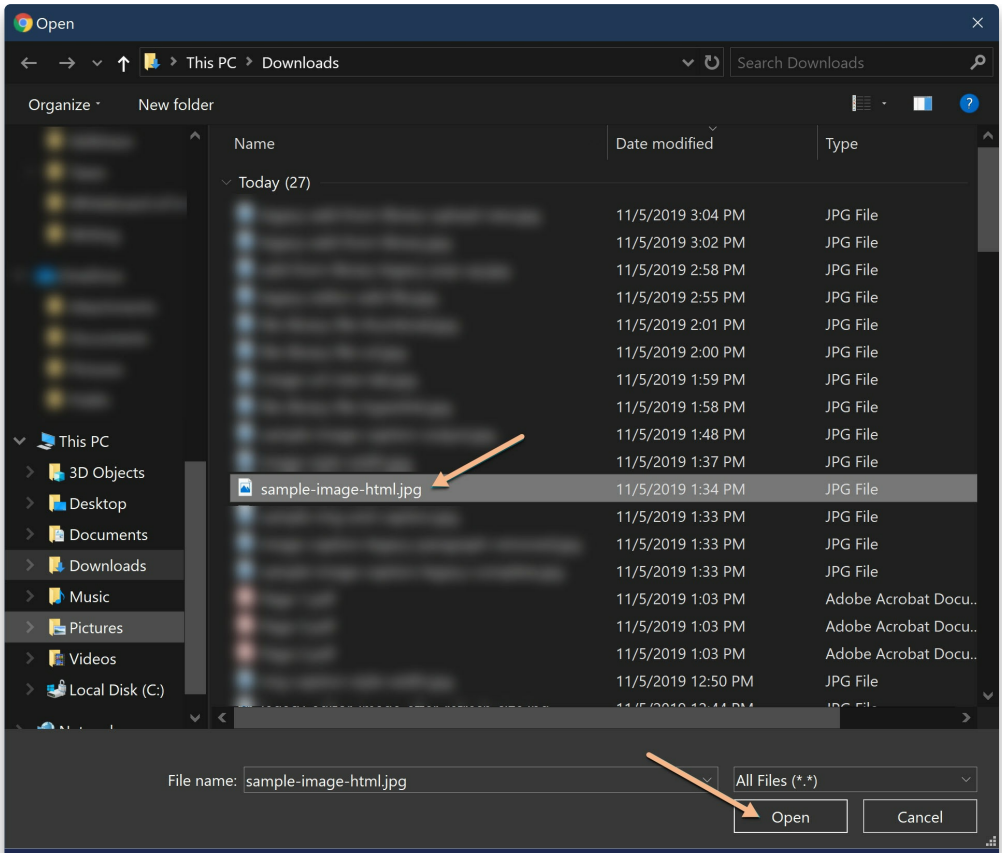
5. To add a new file to your article and the library:

   a. Click the **Upload New File** button in the lower left corner.



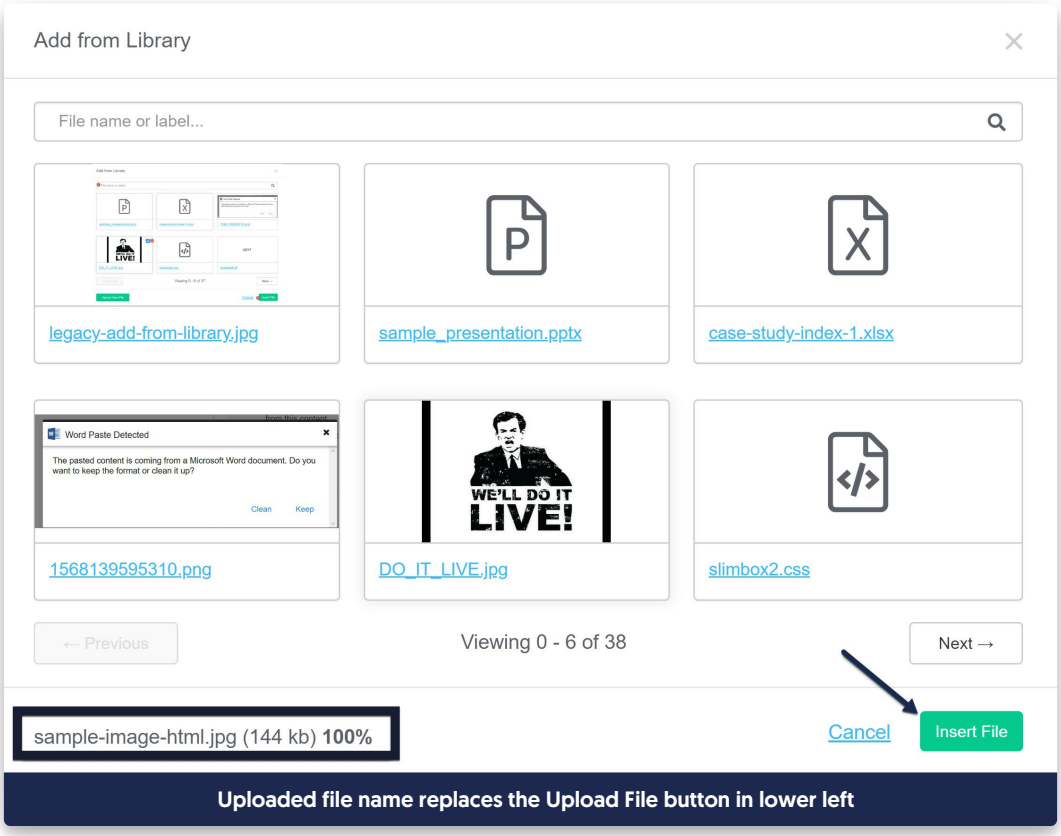
Upload New File button in lower left

   b. This will open an explorer window; navigate to the file you wish to upload, select it, and click the Open button in the lower right.



Sample explorer window to find and select the file you want to upload

c. **You'll see the name of the file you selected for upload in the lower left. Make sure it's what you wanted. Then click the Insert File button to insert the file into your article.**



Uploaded file name replaces the Upload File button in lower left

d. **Select Save once you've added the files or images you want.**

Display PDF file in articles

Last Modified on 05/29/2024 5:28 pm EDT

Note: We used to recommend using Google Docs embed viewer. We stopped recommending this approach in 2018, after all major browsers began supporting displaying PDFs and Google stopped updating the Google Docs embed viewer. We now recommend a basic iFrame, as outlined below.

You can display PDFs inside your articles using an iFrame. This allows you to embed your PDFs inside articles similar to how you can embed YouTube videos using an embed code.

Embedding PDFs is often easier for both authors and readers. Authors don't have to convert the PDFs to web format, and readers can view the PDFs without having to download them. KnowledgeOwl also indexes the content of uploaded PDFs for search so your readers can find articles in search even if the text is inside a PDF.

PDFs or any other files displayed in iframes will not display within the body of KnowledgeOwl-generated PDFs. (For example: if I have an article called "Login instructions", and that article contains a PDF in an iframe, if I then download the PDF KnowledgeOwl automatically generates for "Login instructions", it will display an empty iframe where the embedded PDF is. Iframe content only properly generates while you are online, not viewing a static PDF.)

To embed a PDF in an article using an iframe

1. Upload the PDF to KnowledgeOwl to get the URL. You can upload files under Files > Library, or you can upload the file directly into the article. Both will give you the link. A PDF link looks like this: //dyzz9obi78pm5.cloudfront.net/app/image/id/5b75b38fad121c1c11143be6/n/example-article.pdf
   If you've already uploaded the file you want to work with, so it's in your File Library, you can quickly find the URL for that file.

2. Click on Code View (Source) in the WYSIWYG editor to get to the HTML and paste the following code where you want the PDF to appear.

```
<iframe src="https://dyzz9obi78pm5.cloudfront.net/app/image/id/5b75b38fad121c1c11143be6/n/example-article
```

3. Replace the src URL with the URL of your PDF and save. Be sure to keep the URL in "quotes".

Here's what a PDF looks like embedded in an iframe:

Embed Google Drive files in articles

Last Modified on 07/17/2024 2:29 pm EDT

If you're using Google Drive to create and store some files, Google offers some helpful tools for sharing those resources with others. Google provides publishing options for Sheets, Docs, Slides, and Forms.

There are two main ways you might choose to share files stored in Google Drive:

- URL redirect articles or categories: If everyone accessing your knowledge base already has access to a shared Google Drive, you can consider using URL redirect articles or categories. You can grab the share link for a file and use that as the URL redirect.
- You can also choose to embed your Google file within an article or custom content category in KnowledgeOwl. This can be a good choice if you want someone to be able to preview or see the content without having to click a link.

The downside to embedding or sharing Google files within KnowledgeOwl primarily relates to search: KnowledgeOwl cannot index content stored within Google Drive.

You can get around this by making sure you're providing good search phrases in the article or category, or providing relevant copy written before/after an embed.

If that constraint isn't a dealbreaker for you, follow the instructions below to embed a Google Drive file in an article in KnowledgeOwl!

Before you begin

Before you begin, you'll need:

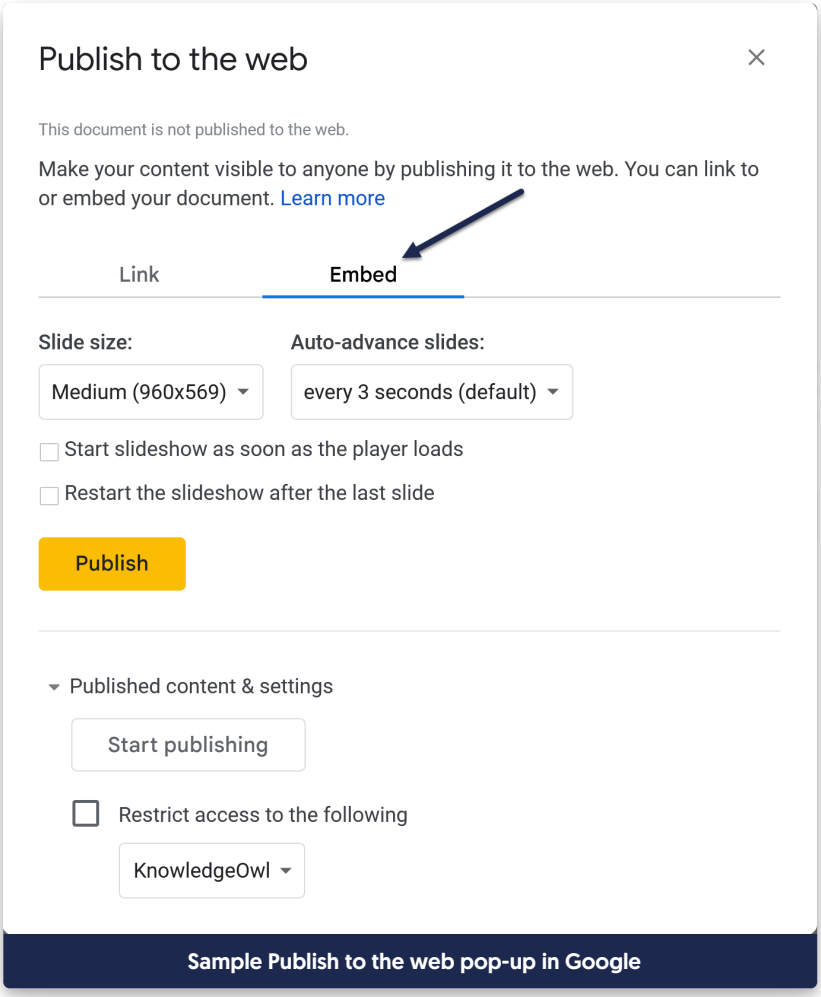
- To know where you want to embed the Google file in your knowledge base. Most likely, you'll want to embed it in an article or a custom content category.
- Access to the Google file you want to embed. Some organizations restrict publishing, so if you don't see the options listed below, you'll likely need to contact your Google organization administrator.

How to embed a Google Drive file in KnowledgeOwl

Once you have that in hand:

1. Open the file in Google Drive you'd like to embed. For this example, we'll be using a Google Slides presentation. ☺
2. In Google, open the **File** menu.
3. Go to **Share**.
4. Select the option to **Publish to web**.
    - Check out the Google documentation on Making Google Docs, Sheets, Slides & Forms public for more details on most of these settings/steps--we offer the following steps just as an example!

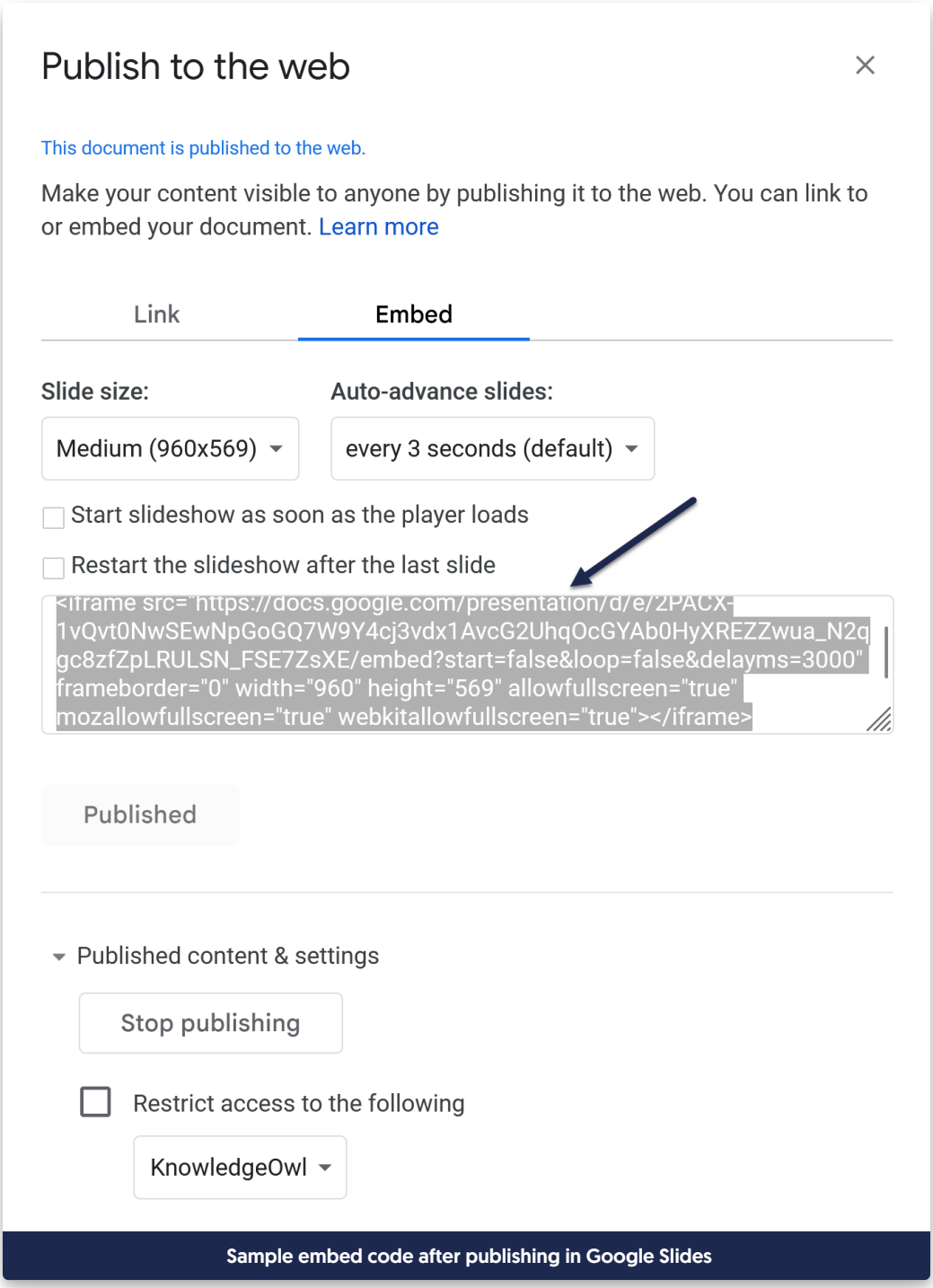
5. **This will open a pop-up with two options: Link and Embed. Select Embed.**



Sample Publish to the web pop-up in Google

6. **This will give you a few options about how you want the embed to work. Choose the settings that make sense to you. The options vary based on which Google Drive product you're using:**
    - **Slideshows will usually give you options for slide size and slide auto advancement, as well as whether to automatically start or restart the slideshow on completion.**
    - **Spreadsheets will give you the option to publish the current sheet or the entire spreadsheet.**
    - **Documents generally have no additional options. :)**
7. **If you see an option for Published content & settings, it's worth opening it to review who will have access once you publish. The options here will vary based on how your Google Drive is set up.**
    - **If you'd like anyone to be able to view it, don't check any boxes to restrict it.**
    - **If you're sharing something internal to your organization and you'd still like to make sure that only people in your organization can see it, check the box for Restrict access to the following and make appropriate selections.**
8. **Once you're done setting the Embed how you'd like it to work, click the Publish button.**
9. **Google will ask you for confirmation that you want to publish; click OK.**

10. **This will generate an iframe embed code in the pop-up:**



Sample embed code after publishing in Google Slides

11. **Copy that entire code and head over to KnowledgeOwl!**
12. **Open the article or custom content category where you'd like to add this content for editing.**
13. ***Optional:*** **If your article or category has a lot of text in it and you want to add the embedded file somewhere in the middle, find some text near where you want to embed your file, and highlight it. This will make the next step easier.**
14. **Select the Code View button in the editor.**
15. **This will toggle you to the raw code view of your content.**

- If you highlighted text in step #13, the same text will still be highlighted in Code View, helping you orient yourself!

16. Move your cursor to the section of your article where you want to embed the file.
17. Paste the iframe embed code you copied from Google in there. Here's a sample of what our embed code looked like:

```
<p>Here are the slides I referenced during this talk, too:</p>

<p style="text-align: center;">
    <iframe src="https://docs.google.com/presentation/d/e/2PACX-1vTqAGlc4tUaBRIl4LQKP1n_Xuxr1xPfPRsqSP-1qmVJQPWcO0nyHhNVx9Jiqg--PAH-GVsi4YEAX9CH/embed?start=false&loop=false&delayms=3000" allowfullscreen="true" mozallowfullscreen="true" webkitallowfullscreen="true" width="960" height="569"></iframe>
</p>

<h2>Related support resources</h2>
```

18. You can now toggle back to the normal editor view by clicking the **Code View** button again. You should be able to see your embedded file displayed in the editor, and clicking **Preview** should also show it.
19. Once you're done making edits to your article or category, be sure to **Save** (or Publish!) your changes.



If anyone uses the **Stop Publishing** option in your original Google file, your embeds will break.

You can see a live version of an embedded Google Slideshow in: Three use cases for snippets (March 15th).

Display Microsoft Office OneDrive files in articles

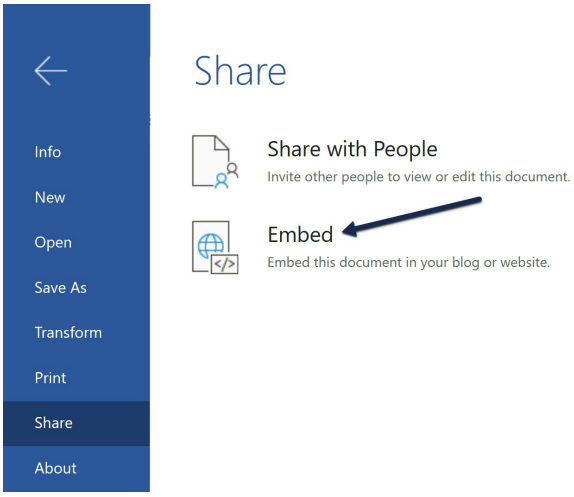
Last Modified on 05/29/2024 5:28 pm EDT

If you are using Microsoft Office Online (including Office 365), you can embed Microsoft Office files directly from your OneDrive account into KnowledgeOwl articles, without uploading those Office files to your knowledge base.

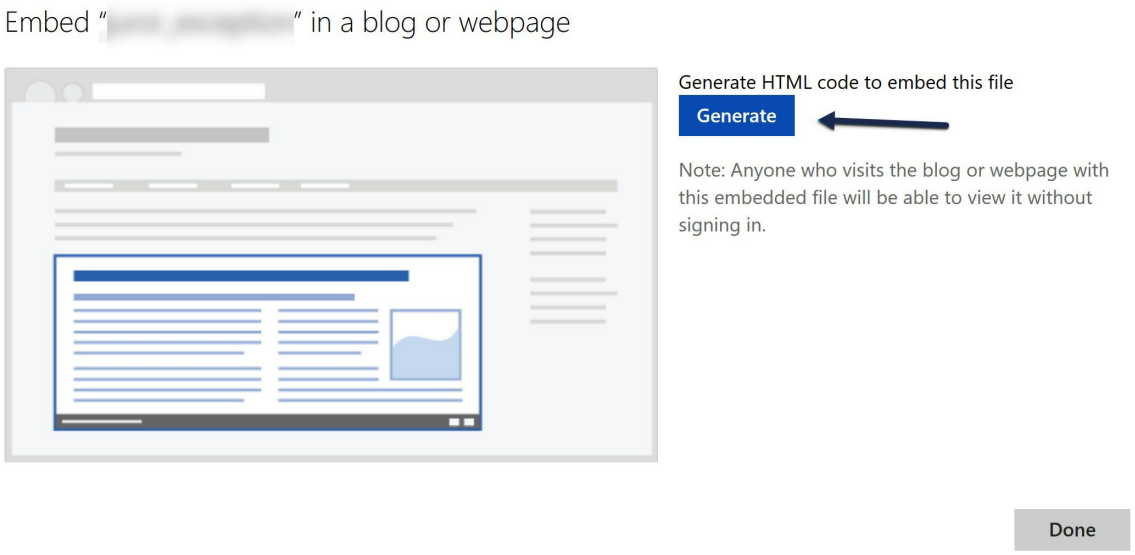
Embedding files is often easier for both authors and readers. Authors don't have to worry about file conversion or incompatible software, and readers can view the files without having to download them. It also guarantees that as soon as you make changes in OneDrive, your knowledge base readers will see the updated file contents.

To embed a Microsoft Office file in OneDrive into an article using an iframe

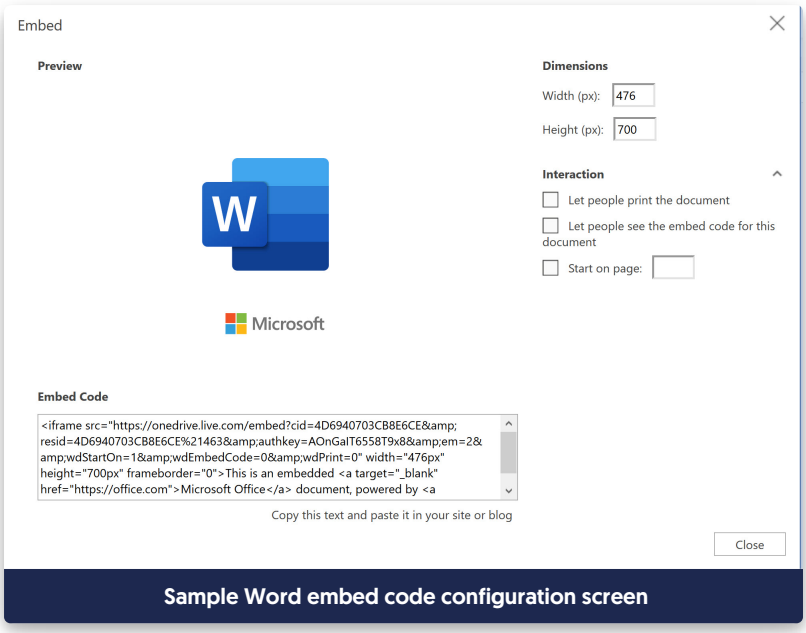
1. Open the OneDrive file you'd like to embed in your article.
2. Go to **File > Share**.
3. Select **Embed**.



4. This will prompt you to **Generate** the embed code (your screen may look slightly different depending on which Office product you're using). Click the **Generate** button.



5. **This will open a pop-up where you can configure your embed code. The options here will vary based on the Office file type (e.g. Powerpoint options are different from Word). For documents and spreadsheets, we recommend using something in the 600px-800px range for your height.**



Sample Word embed code configuration screen

6. **Once you're finished changing the settings, copy the code in the Embed Code box.**

7. **In your article in KnowledgeOwl, click on Code View (Source) in the WYSIWYG editor to get to the HTML and paste that embed code in.**

8. **Save your article.**

Here's a PowerPoint presentation embedded from OneDrive:

Display Microsoft Office file in articles

Last Modified on 05/29/2024 5:28 pm EDT

This approach allows you to embed your MS Office files inside articles similar to how you can embed YouTube videos using an embed code.

Embedding files is often easier for both authors and readers. Authors don't have to worry about file conversion or incompatible software, and readers can view the files without having to download them.



Update October 16, 2019: Microsoft has taken down the web portal for their Office Online Doc Viewer, which we used to recommend using. We've been in contact with Microsoft but haven't found out if it was moved or decommissioned. For now, it looks like they are still supporting the viewer itself, just not the URL encoding. The steps below will help you generate an appropriate encoded file URL to use with the viewer.

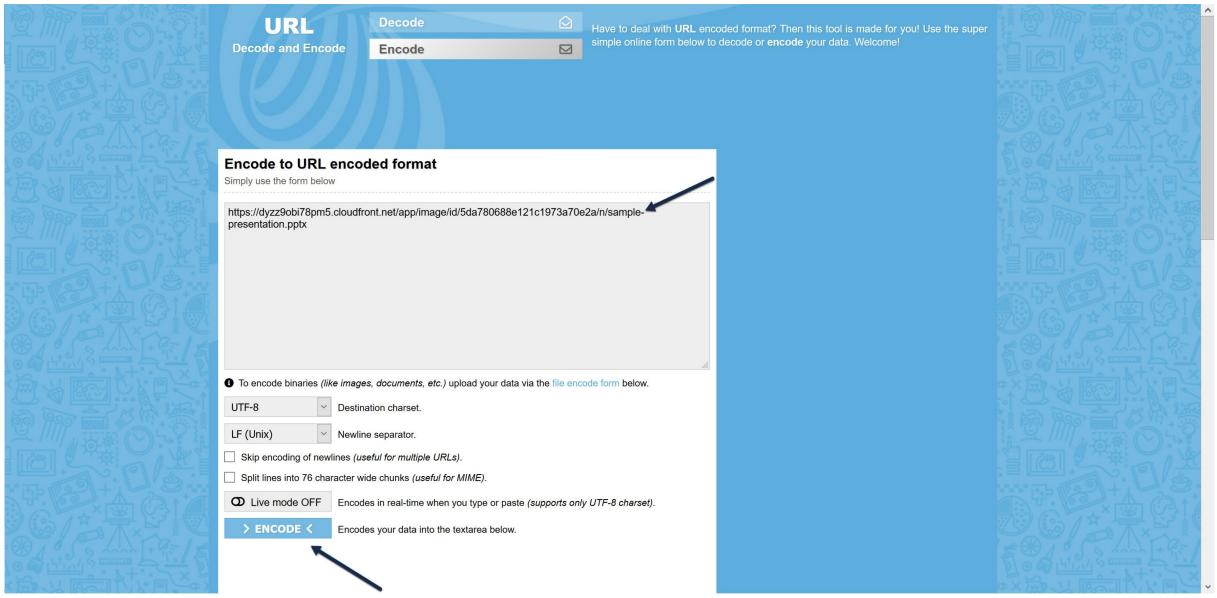
If you use Office Online, we recommend embedding files directly from OneDrive without uploading them to KnowledgeOwl. Contact us if you need help!

To be able to use the Office Online Doc Viewer, your files cannot be larger than:

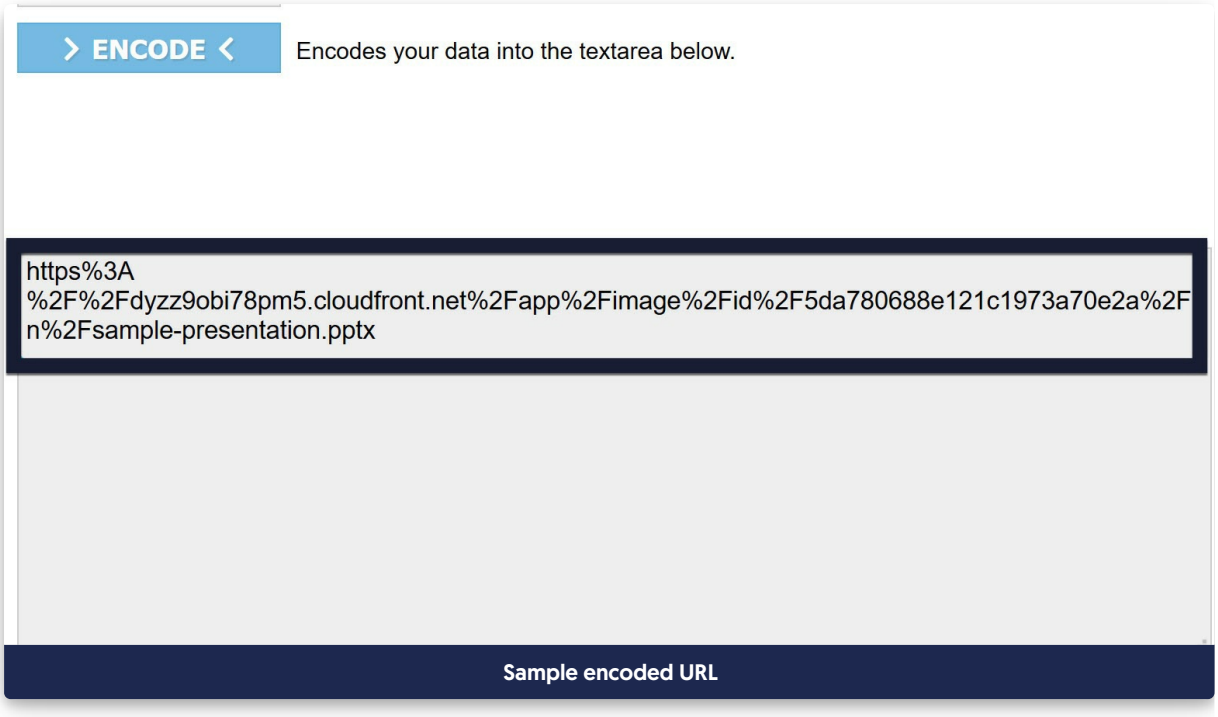
- Word: 10Mb
- PowerPoint: 10Mb
- Excel: 5Mb

To embed a Microsoft Office file in an article using an iframe:

1. Upload the file to KnowledgeOwl to get the URL. You can upload files under **Files > Library**, or you can upload the file directly into the article. Both will give you the link. A sample PowerPoint file link looks like this:
   `https://dyzz9obi78pm5.cloudfront.net/app/image/id/5da780688e121c1973a70e2a/n/sample-presentation.pptx`
2. Once your file is uploaded, copy the URL for that file.
3. Go to URL Encode and Decode. Paste your file's URL into the top section and click the **Encode** button.



4. **This will generate an encoded version of your URL which you can use in your iframe:**

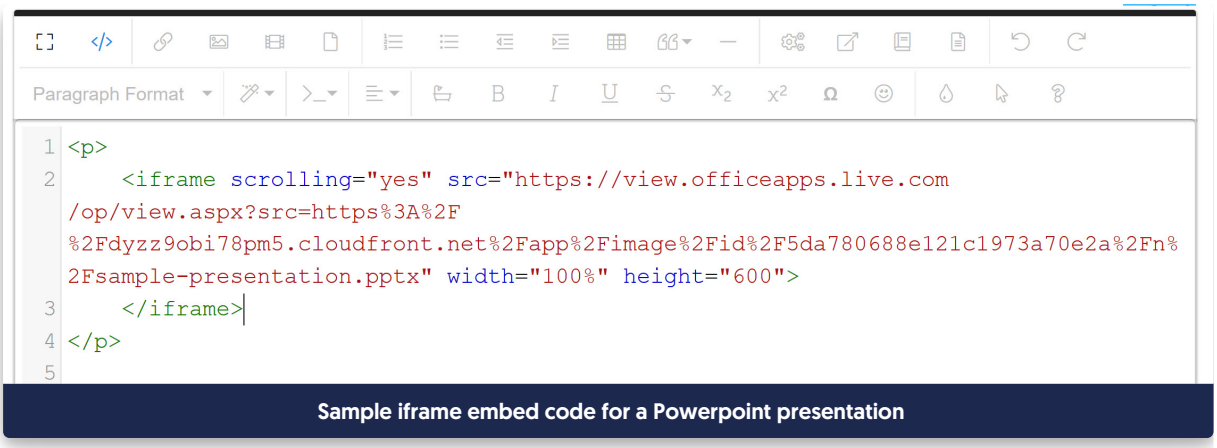


5. **Copy that URL.**

6. **In KnowledgeOwl, click on Code View (Source) in the WYSIWYG editor to get to the HTML and paste the following code where you want the file to appear.**

```
<iframe width="100%" height="600" scrolling="yes" src="https://view.officeapps.live.com/op/view.aspx?src=EN
</iframe>
```

7. **Replace the** `ENCODED-URL-HERE` **with the encoded URL you generated in Step 3 and save.**
   For our example, our embed code would look like this:



Sample iframe embed code for a Powerpoint presentation

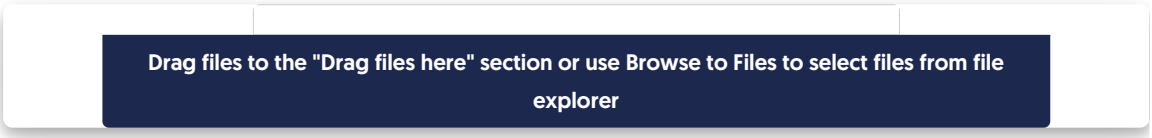
Here's what a PowerPoint presentation looks like embedded in an iframe using this method:

Add files in bulk

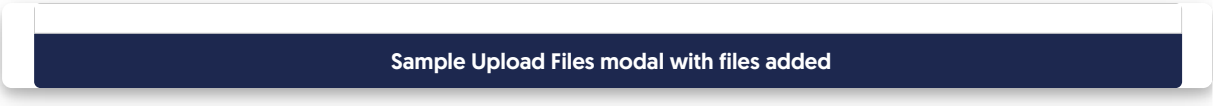
Last Modified on 05/29/2024 5:27 pm EDT

To add multiple images, videos, or files at once:

1. Go to **Library > Files.**
2. Select the **+ Add Files** button in the upper left. The **Upload Files** modal opens.
3. Add files by:
    a. Dragging files from your desktop or File Explorer and dropping them in the modal near **Drag files here.**
    b. Selecting **Browse to Files**, selecting the files you want to add, and opening them.



4. Once you've added the files you'd like to upload, select **Upload Files...** to complete the upload.



5. A progress bar displays in the modal while the upload runs. Once upload is complete, the modal closes.

Duplicate files
If you upload a file with the same name as something that already exists in your File Library, KnowledgeOwl appends a random 6 character code on the end, using a-f0-9. This helps enforce uniqueness in the file names and URLs and makes it easier to identify when you may have duplicate files.

Edit and update files

Last Modified on 05/29/2024 5:27 pm EDT

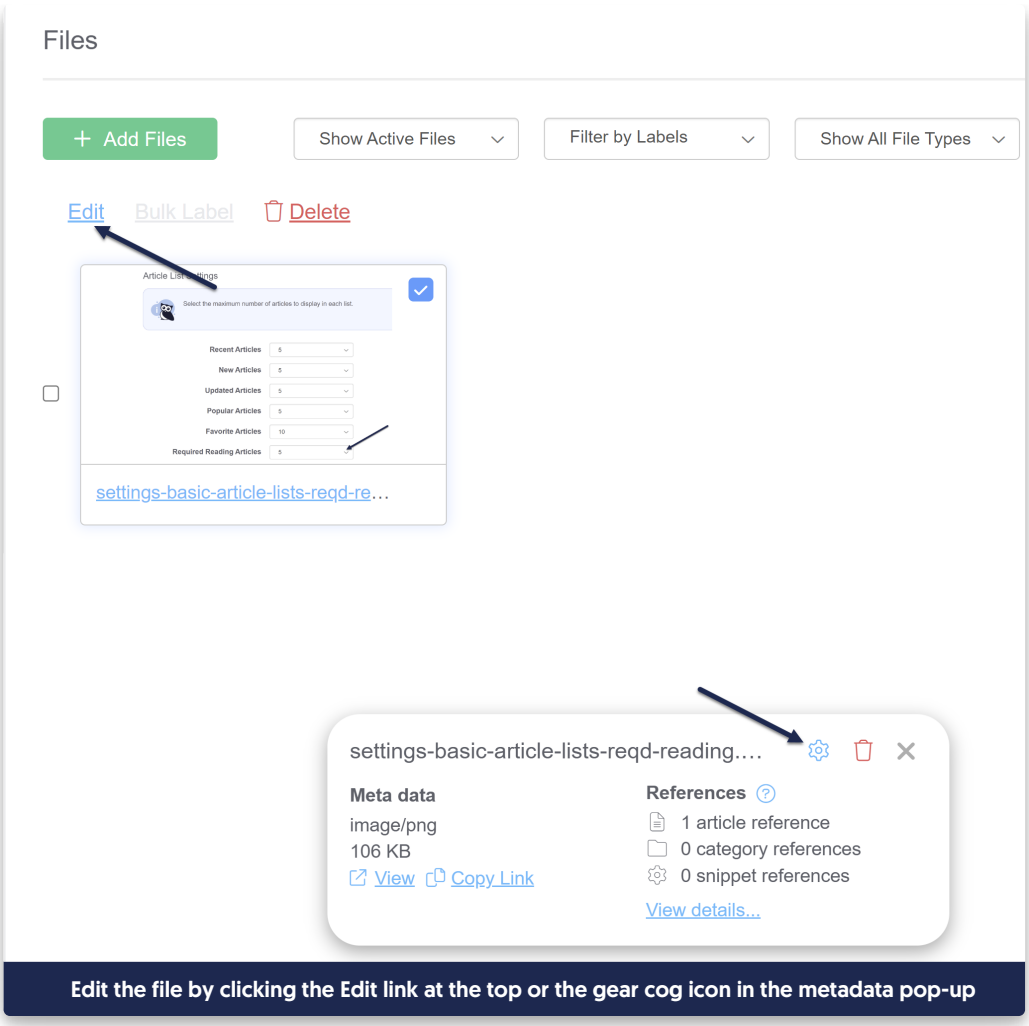
Every file you add to an article in your knowledge base is stored in your File Library. You can access files there to update the name, the file itself, and labels associated with that file.

Renaming files

By default, files are uploaded with a name based on the file you originally uploaded. This is the name that will show up when the file is downloaded/opened.

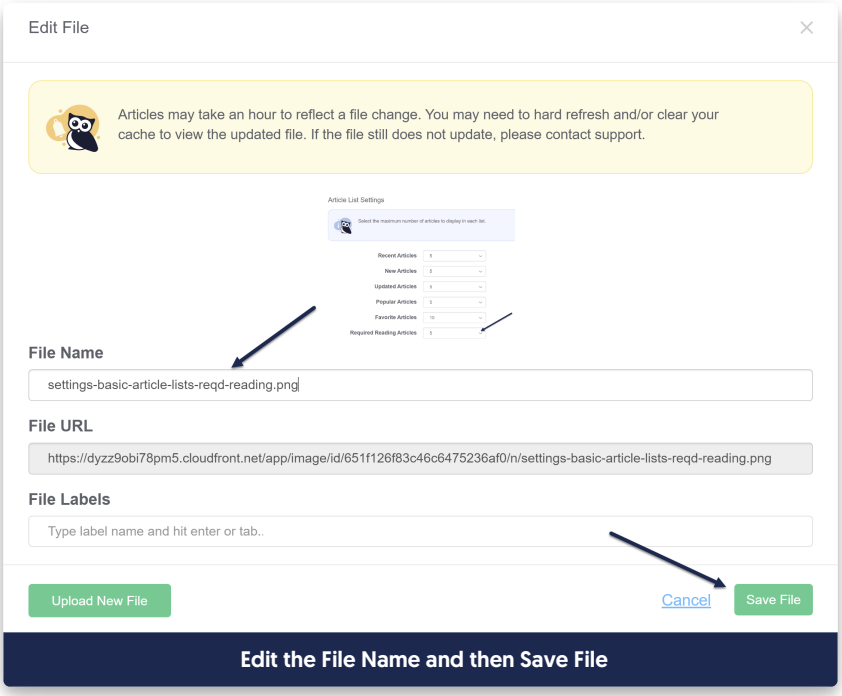
If you'd like to edit this to something more human-friendly or search-friendly:

1. Go to **Library > Files**.
2. Find the file you'd like to edit (use search or the Labels filters if necessary).
3. Click on that file.
4. From here, you can either:
    a. Click the **Edit** link at the top of the page.
    b. Click the gear cog icon in the metadata pop-up at the bottom of the page.



5. **This will open the Edit File pop-up. Edit the File Name to be what you'd like.**

6. **Click the Save File button in the lower right.**



Updating files

Linus is a busy little owl, and he updates a lot of screenshots and articles. Whenever he can, he reuses existing screenshots in the File Library. When it comes time for him to update that screenshot, rather than manually replacing the screenshot in every single article he used it in individually, he updates the existing file in File Library with the new screenshot. This approach has some great advantages:

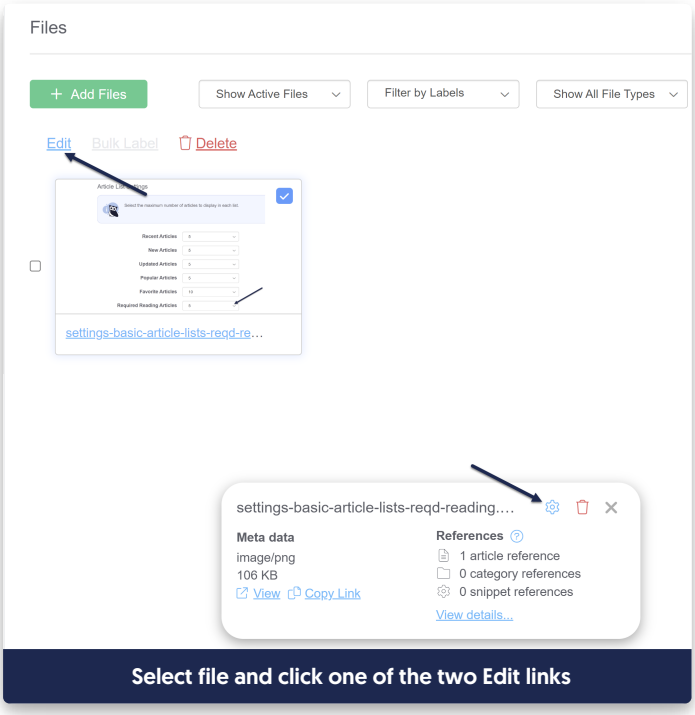
- It's a real time-saver for editors (one update in File Library rather than manually editing a bunch of articles)
- It keeps the File Library from getting bloated with old/outdated/duplicate copies of files
- It guarantees that everywhere the screenshot was used, it's updated to the latest version of the file



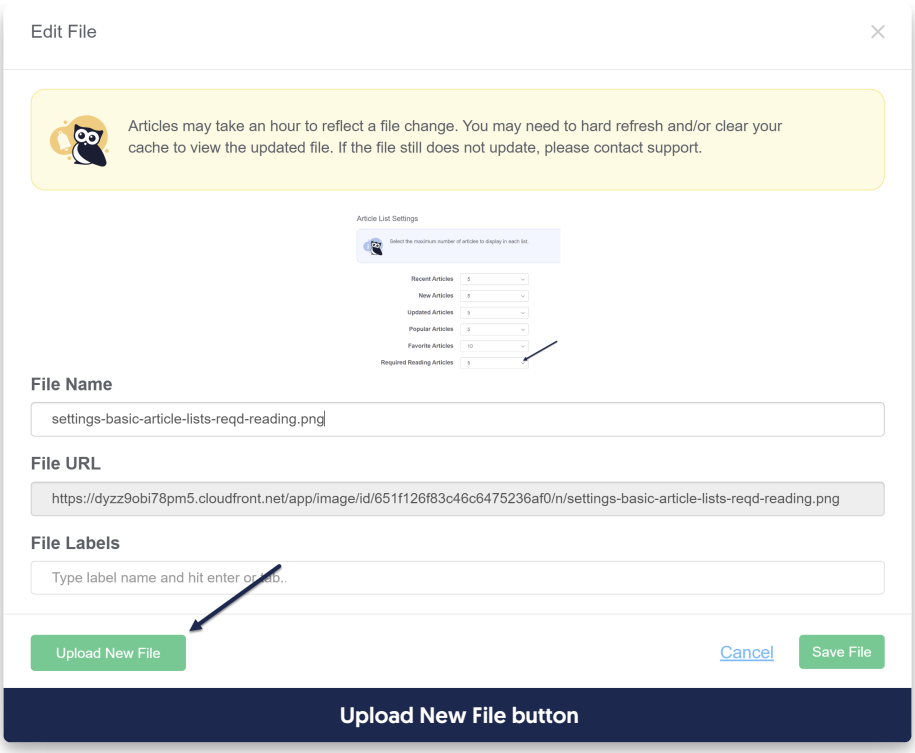
We strongly recommend updating files from the File Library!

To make this kind of update:

1. Go to **Library > Files.**
2. Find the file you'd like to edit (use search or the Labels filters if necessary).
3. Click on that file.
4. Click the **Edit** link just above the file thumbnails or the gear cog icon in the metadata pop-up at the bottom of the screen:

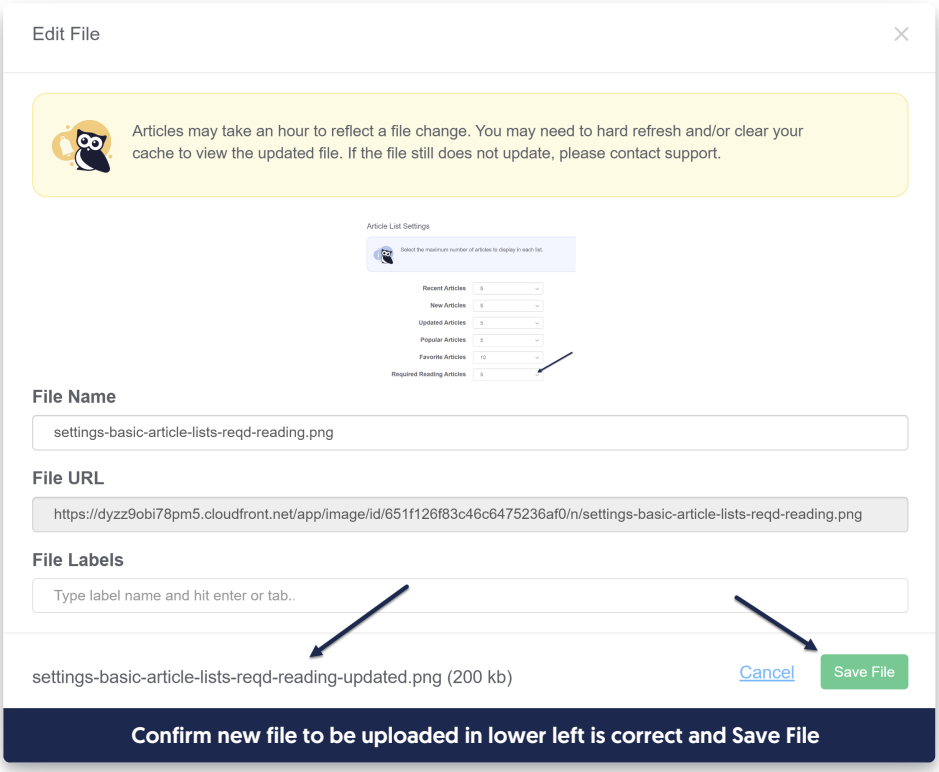


5. This will open the **Edit File** pop-up.
6. Click the **Upload New File** button in the lower left.



7. **Navigate to and select the new version of the file you want to replace the existing one.**

8. **The name of the file you've selected will display in the lower left corner. If this is correct, click the Save File button in the lower right.**



As the warning at the top of the pop-up notes, while most articles will update immediately, some can take up to an hour to update. Contact us if you have issues with a file not updating.

File upload errors

Last Modified on 05/29/2024 5:28 pm EDT

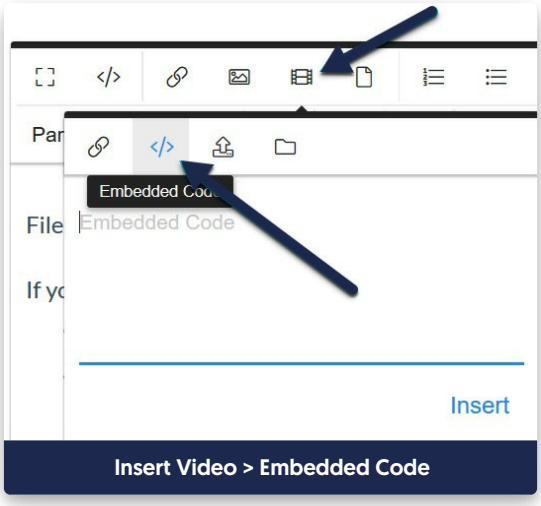
File upload errors are generally caused by one of two things:

1. Files which are too big for KnowledgeOwl storage
2. Files which have been corrupted in some way

Files uploaded to KnowledgeOwl **cannot be bigger than 200MB**. Uploading files larger than 200MB will throw an error.

If you have a file larger than 200MB, we recommend using another hosting provider to store this file. Depending on the tool, you can then either:

- Insert a link to the URL of that file in your article
- Use the hosting provider's embed tools to generate an embed code you can add to your article. For videos, you can use the **Embedded Code** option to paste the embed code from a video hosting platform into your article. See Embed videos for more information.



Insert Video > Embedded Code

If the file you're uploading is under 200MB and it's still throwing an error, the file may be corrupted. Try opening it in the program you created it in, saving a new copy, and uploading that new copy.

Introduction to the File Library

Last Modified on 05/29/2024 5:28 pm EDT

Every file you add to an article in your knowledge base is stored in your File Library. You can access files there to update:

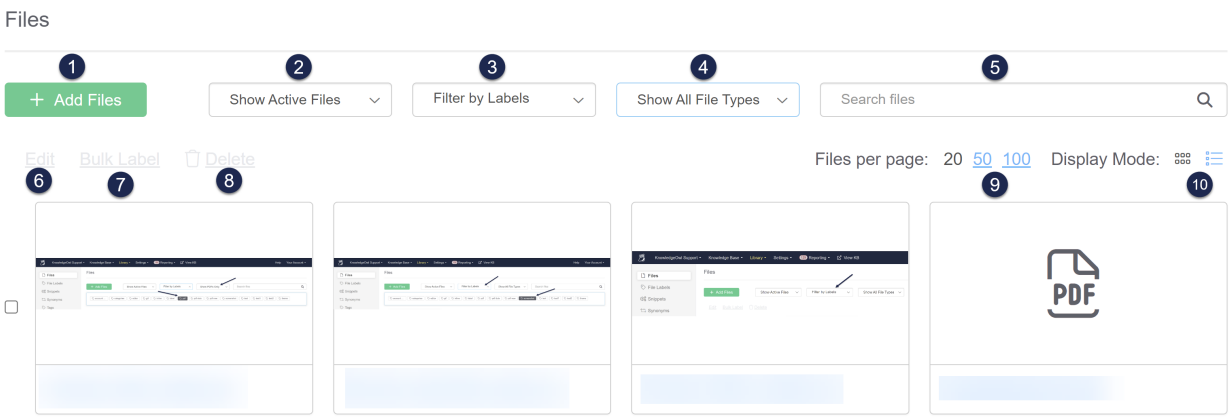
- The name of the file
- The file itself
- The file labels associated with that file

You can also delete files you no longer need and recover files that have been incorrectly deleted.

And for each file, you can view its references: all the places that this file is being used.

Adding file labels, deleting, and recovering files can be done for individual files or for multiple files in bulk. Changing file names or the files themselves must be done for individual files only.

To access your File Library, go to **Library > Files**. You should see something like this:

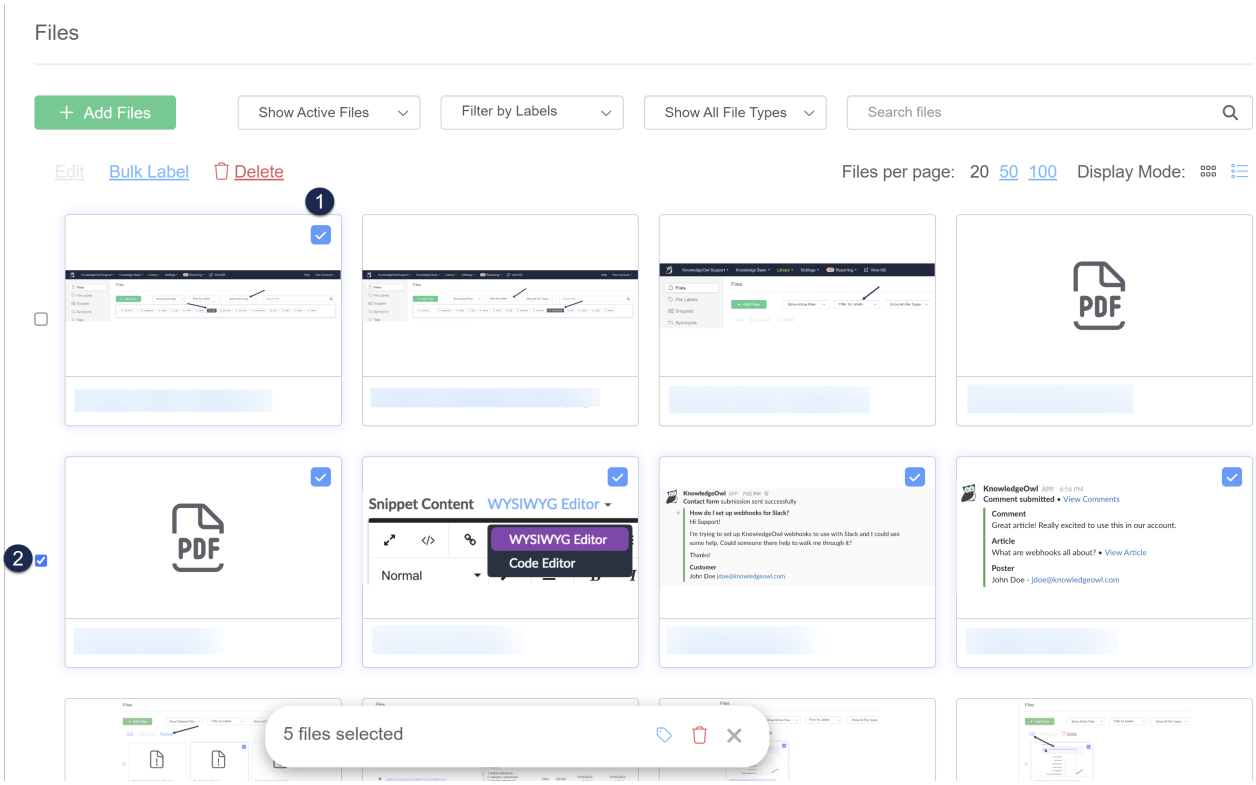


1. To add files directly to the File Library, use the **+ Add Files** button. This will open a pop-up where you can select the files to upload. See Adding files and images in bulk for more info.
2. You can choose to **Show Active Files** or **Show Deleted Files**. If you select Show Deleted Files, you'll see a **Restore** option instead of **Delete**.
3. If you've created File Labels, use the **Filter by Labels** dropdown to filter the File Library to files containing one or more file labels.
4. You can filter the File Library by **File Types**. The options are:
    - Show All File Types (default)
    - Show Images Only
    - Show Videos Only

- Show PDFs Only
- Show Word Files Only
- Show Excel Spreadsheets Only
- Show Powerpoint Presentations Only
- Show Audio Files Only
- Show Zip Files Only

5. You can **search** for a word or file name. Any search phrases entered here will search within the selected filters. Use the default settings (Show Active Files, no Filter by Labels, Show All File Types) to search your entire File Library of active files.
6. When you've selected an individual file, the **Edit** link will activate. You can click that link to open a pop-up to edit the file's name, file itself, and add or remove file labels. This option is disabled when you have no files selected or multiple files selected. See Editing and updating files for more info.
7. When you've selected one or more files, the **Bulk Label** option will activate. You can click that link to open a pop-up to add file labels to all selected files. This option is disabled when you have no files selected or a single file selected. See Using labels as filters for using the label filter and File Labels for more information on file labels themselves!
8. When you've selected one or more files, the **Delete** option will activate. You can click that link to delete the selected files. (Note: deleting files will not delete references to those files from categories, articles, or other places they're used, like your **Settings > Style**. Be sure the file is no longer in use before deleting!) If you've selected the **Show Deleted Files** option, instead of a **Delete** option, you'll see a **Restore** option. See Restoring deleted files for more info on restoring deleted files!
9. Use the **Files per page** options to change how many files are displayed per page in the library. Options are 20, 50, and 100. (Default is 20.)
10. You can toggle between two **Display Modes**. The default mode is the icon or thumbnail view in the screenshot above, represented by the icon with six squares in two rows. You can toggle to list view by clicking the list icon next to it. Not sure which view would be best? See Which File Library display mode should I use? to help decide!

In order to edit, bulk label, or delete files, you'll need to select them. In icon view, you can select a file by clicking anywhere on the file's thumbnail (1 in the screenshot below). You can select all four files in a row by checking the box to the left of the row (2 in the screenshot below):



When a file is selected in the icon view, a white checkmark on a blue square will appear in the upper right corner of the thumbnail.

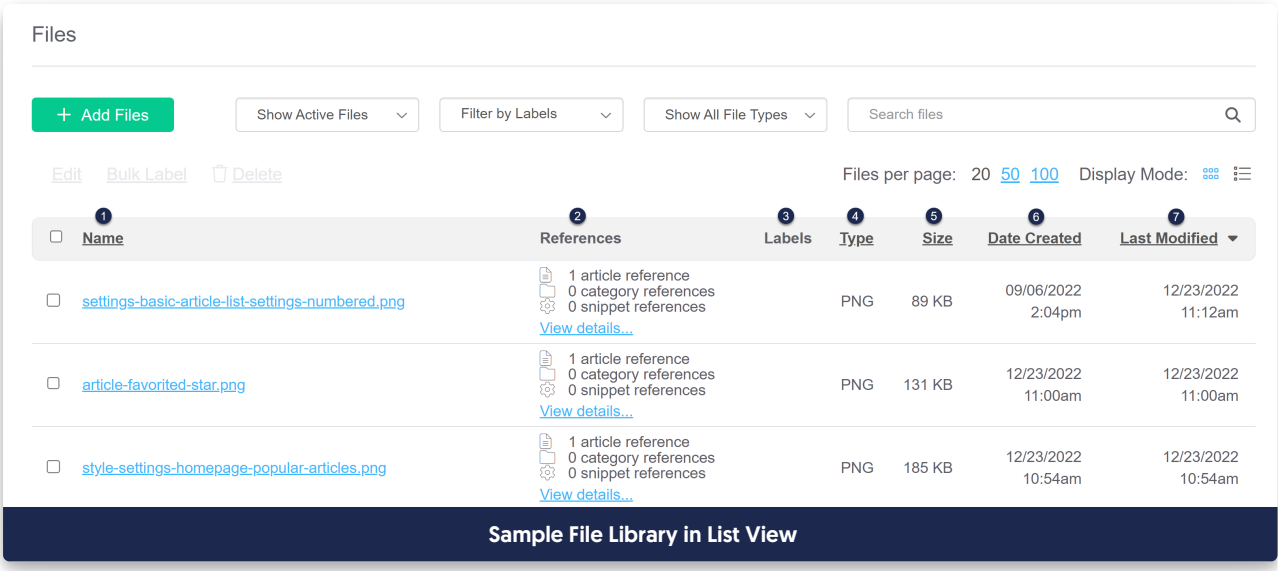
See List View for making file selections in List View.

To open an individual file for viewing rather than editing, click on the hyperlinked name below the file thumbnail. The file should open in a new tab if it's supported by your browser, or download if it's not.

File Library List View

Last Modified on 05/29/2024 5:28 pm EDT

Once you select the List View by clicking on the list icon in the Display Mode section of File Library, the filter options and other controls look the same, but the library view changes:



Sample File Library in List View

Now, you'll see a table with various columns:

1. **Name:** displays the file's name.
2. **References:** displays a summary count of the places this file is used. Click the **View details** link to open a pop-up to see a more detailed list.

   This functionality was added 28 December 2022 and requires a one-time reindex process to be run to fully populate. If your knowledge base existed before 28 December 2022, contact us to run that reindex!

3. **Labels:** displays any File Labels added to the file.
4. **Type:** displays the file's type, as designated by the file extension.
5. **Size:** displays the total size of the file. File Library will only allow files up to 200MB in size.
6. **Date Created:** displays the date the file was originally created.
7. **Last Modified:** displays the date the file was last edited. If it has never been edited, the Date Created and Last Modified will be identical.

You can click any of the underlined column headers (all columns except Labels) to sort the view by that

column. Clicking the same column multiple times will toggle between ascending and descending sort. The column used to sort will have an up arrow or down arrow next to it. For example, in the screenshot above, our File Library is sorted by Last Modified, descending order.

To select a single file in list view, click anywhere in that file's row or explicitly in the checkbox to the left of the file name. A checkmark will appear in the box the left of the file to indicate it's selected. To select multiple files, use the filter and search to display the files you need to select, then click in the checkbox to the left of the **Name** column header to select all displayed files for editing.

To open an individual file for viewing, click on the hyperlinked name. The file should open in a new tab if it's supported by your browser, or download if it's not.

Which File Library view should I use?

Last Modified on 05/29/2024 5:28 pm EDT

The Display Mode in File Library lets you toggle between Icon view and List view. Each view has its own best use cases:

Icon view or thumbnail view is best used for:

- "Seeing" the files: if you're working a lot with visual or video content, icon view can help you visually scan your files quickly to see if they need updates or confirm you have the right file
- Seeing the most recently edited files first (they are always presented at the start of the icon view)

List view is best used for:

- Sorting your file library in different ways
- Seeing the file labels that are added to various files
- Seeing the exact date the file was created or last modified
- Auditing file types to, for example, remove all .jpg files and replace them with .png files
- High-volume bulk labeling or bulk delete/recovery. If you can use the filters and search to display only the files you need, you can bulk-select the entire library for these bulk operations!

They're equally useful for:

- Editing individual file details (name, file labels, the file itself)
- Deleting or restoring files

See Introduction to the File Library for an overview of File Library and the icon view; see List View for more details on the List view.

Add files and images directly in File Library

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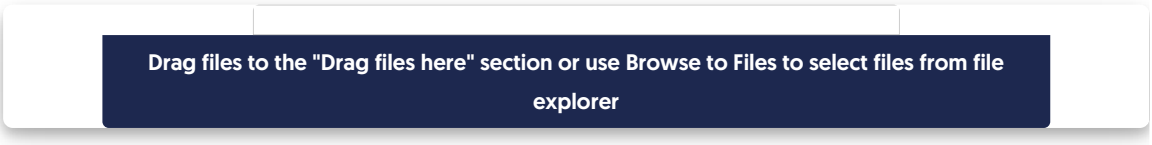
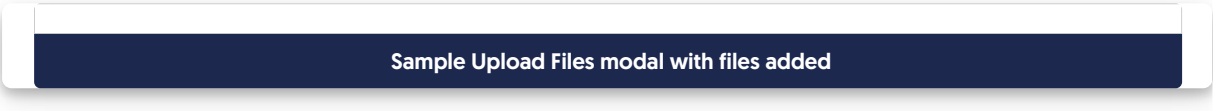
To add multiple images, videos, or files at once:

1. Go to **Library > Files.**
2. Select the **+ Add Files** button in the upper left. The **Upload Files** modal opens.
3. Add files by:
    a. Dragging files from your desktop or File Explorer and dropping them in the modal near **Drag files here.**
    b. Selecting **Browse to Files**, selecting the files you want to add, and opening them.



4. Once you've added the files you'd like to upload, select **Upload Files...** to complete the upload.



5. A progress bar displays in the modal while the upload runs. Once upload is complete, the modal closes.

Duplicate files
If you upload a file with the same name as something that already exists in your File Library, KnowledgeOwl appends a random 6 character code on the end, using a-f0-9. This helps enforce uniqueness in the file names and URLs and makes it easier to identify when you may have duplicate files.

Edit and update files in the File Library

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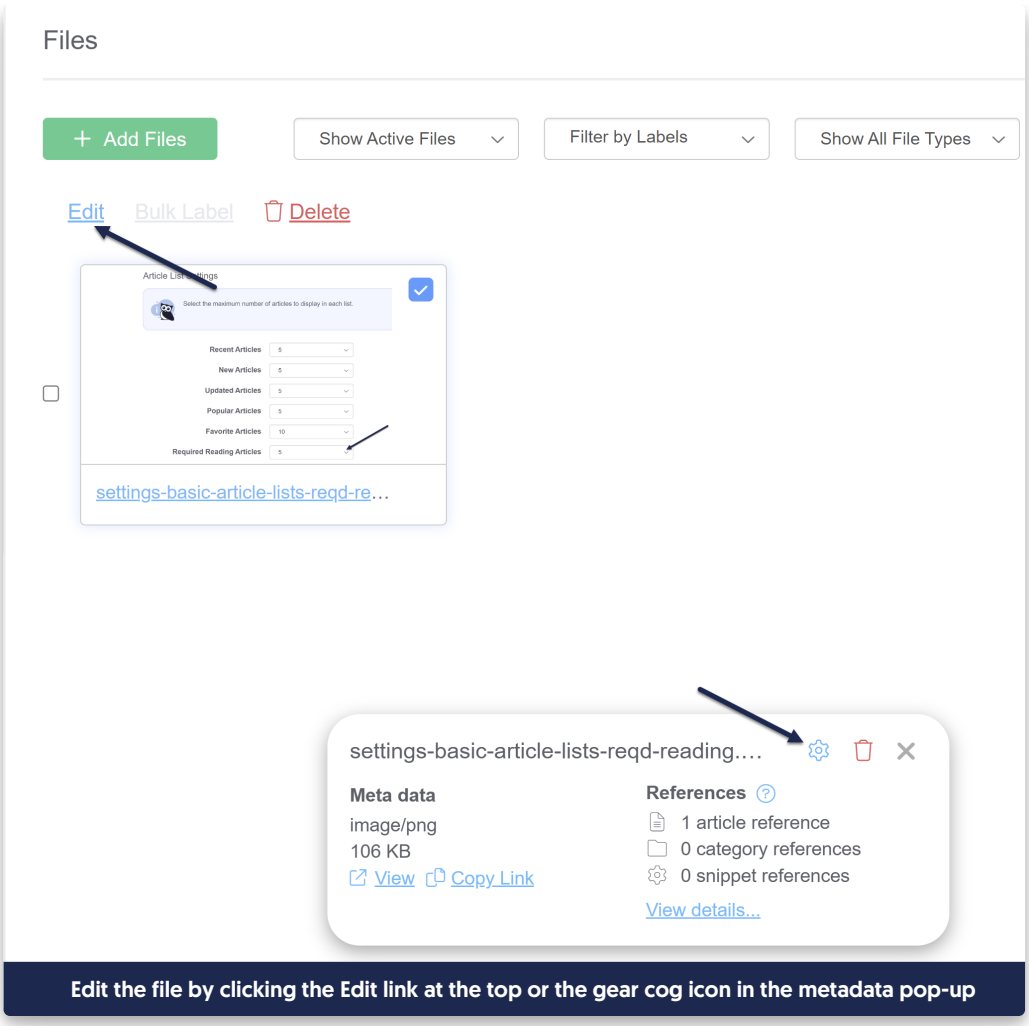
Every file you add to an article in your knowledge base is stored in your File Library. You can access files there to update the name, the file itself, and labels associated with that file.

Renaming files

By default, files are uploaded with a name based on the file you originally uploaded. This is the name that will show up when the file is downloaded/opened.

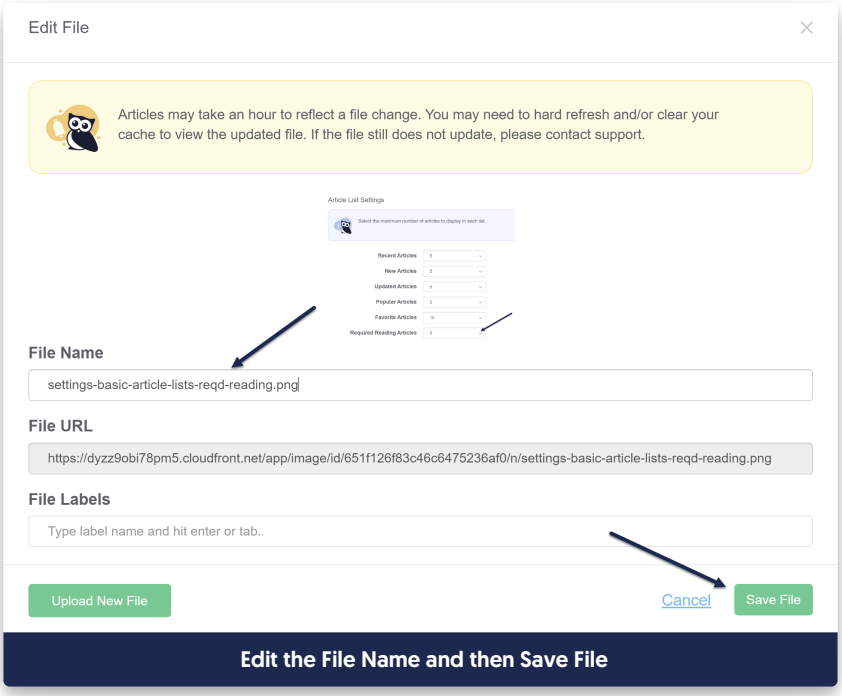
If you'd like to edit this to something more human-friendly or search-friendly:

1. Go to **Library > Files**.
2. Find the file you'd like to edit (use search or the Labels filters if necessary).
3. Click on that file.
4. From here, you can either:
    a. Click the **Edit** link at the top of the page.
    b. Click the gear cog icon in the metadata pop-up at the bottom of the page.



5. **This will open the Edit File pop-up. Edit the File Name to be what you'd like.**

6. **Click the Save File button in the lower right.**



Updating files

Linus is a busy little owl, and he updates a lot of screenshots and articles. Whenever he can, he reuses existing screenshots in the File Library. When it comes time for him to update that screenshot, rather than manually replacing the screenshot in every single article he used it in individually, he updates the existing file in File Library with the new screenshot. This approach has some great advantages:

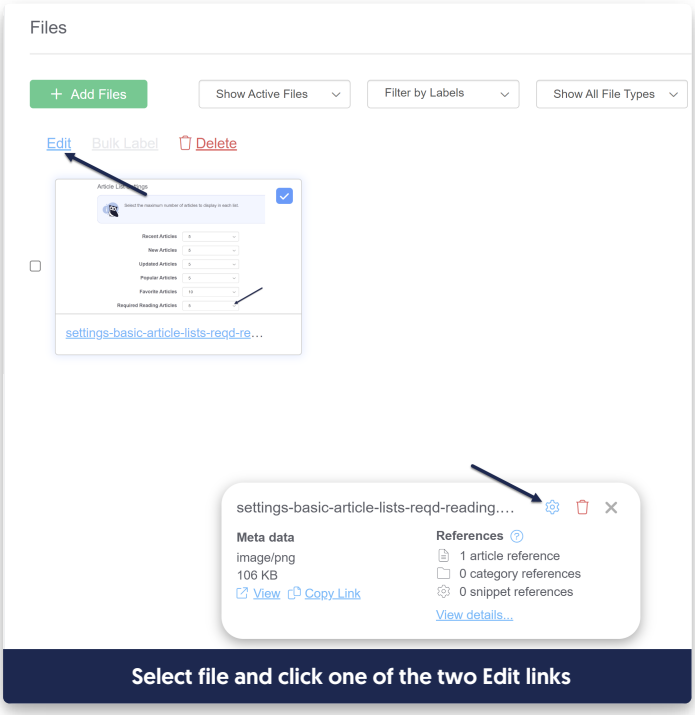
- It's a real time-saver for editors (one update in File Library rather than manually editing a bunch of articles)
- It keeps the File Library from getting bloated with old/outdated/duplicate copies of files
- It guarantees that everywhere the screenshot was used, it's updated to the latest version of the file



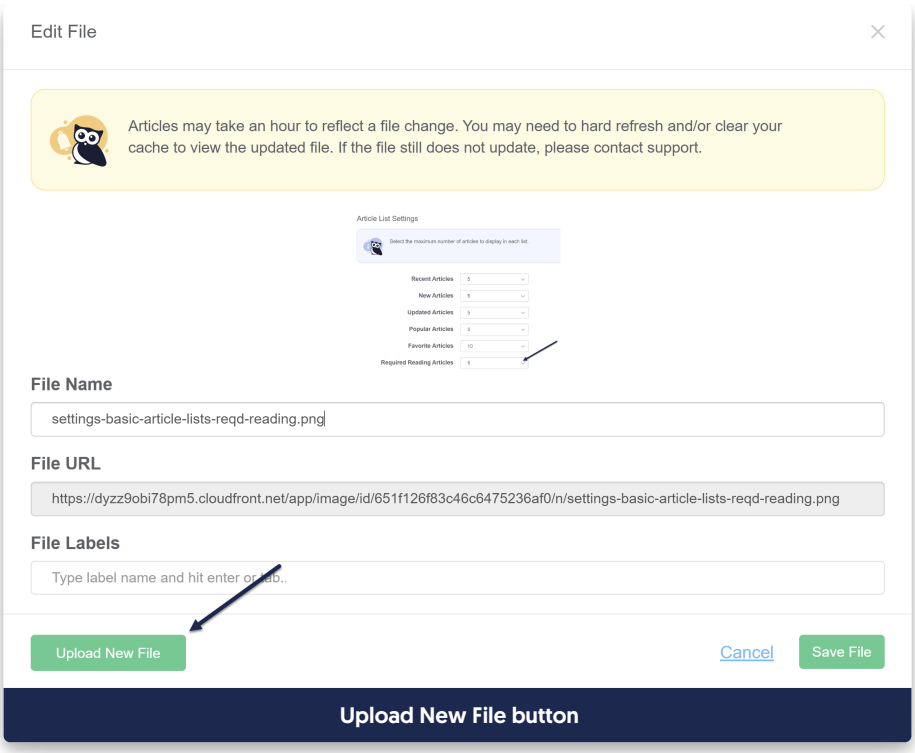
We strongly recommend updating files from the File Library!

To make this kind of update:

1. Go to **Library > Files.**
2. Find the file you'd like to edit (use search or the Labels filters if necessary).
3. Click on that file.
4. Click the **Edit** link just above the file thumbnails or the gear cog icon in the metadata pop-up at the bottom of the screen:

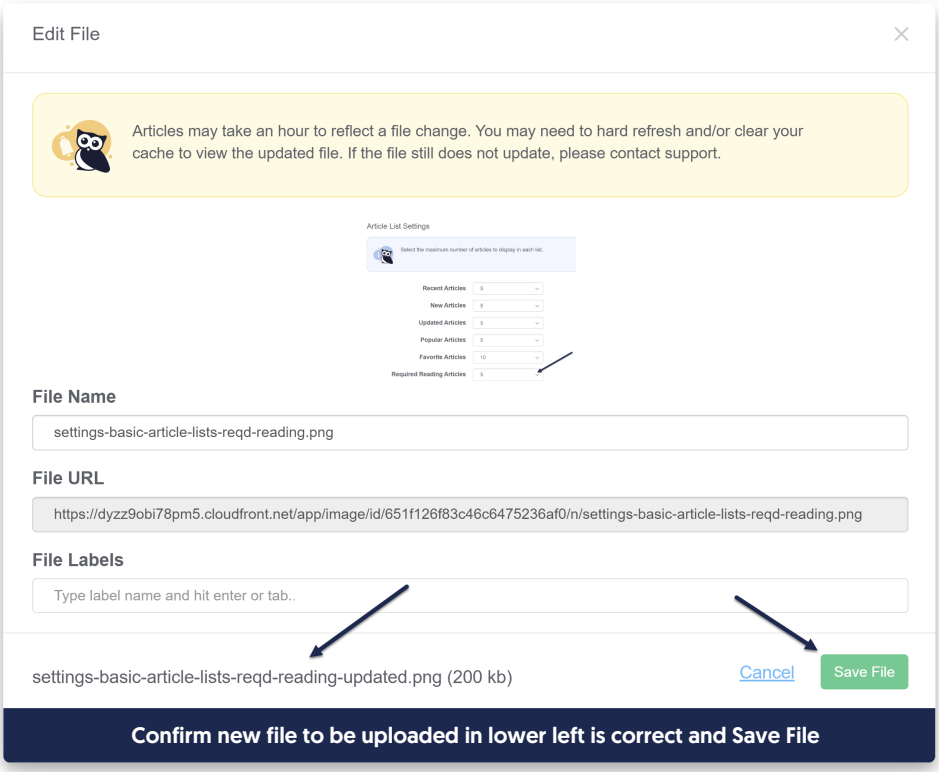


5. This will open the **Edit File** pop-up.
6. Click the **Upload New File** button in the lower left.



7. **Navigate to and select the new version of the file you want to replace the existing one.**

8. **The name of the file you've selected will display in the lower left corner. If this is correct, click the Save File button in the lower right.**



As the warning at the top of the pop-up notes, while most articles will update immediately, some can take up to an hour to update. Contact us if you have issues with a file not updating.

Find a file's URL

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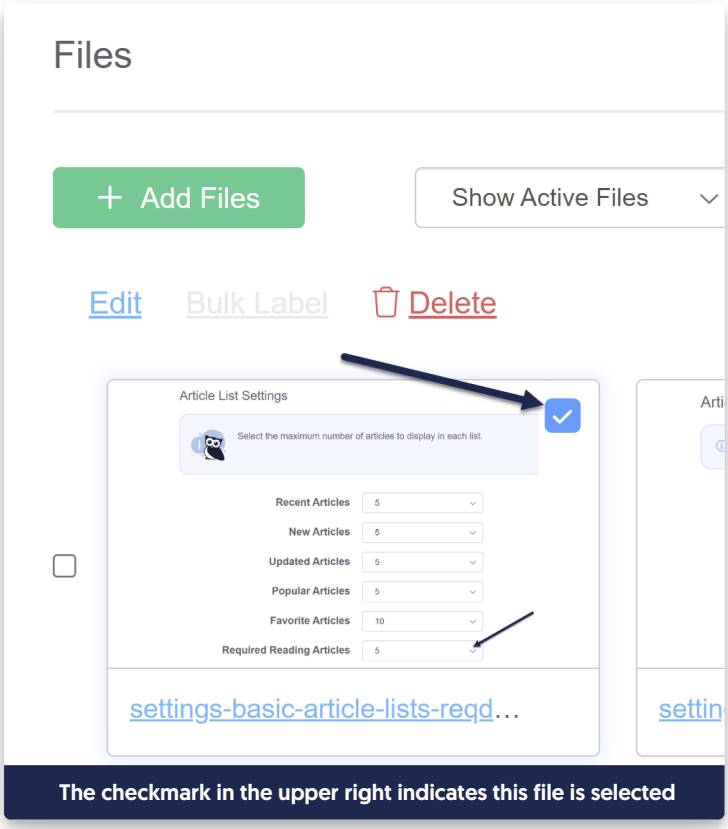
There are a few places within KnowledgeOwl where you might need to have the URL to your image, like Changing the background image on your homepage.

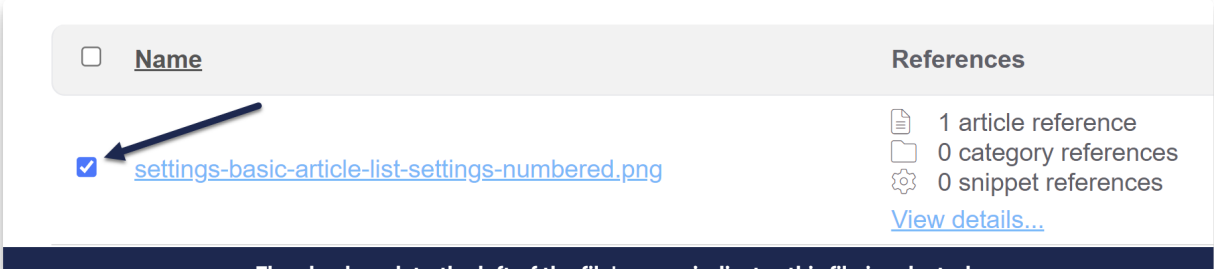
You can copy the URL for a file quickly from the File Library:

1. In the lefthand navigation, go to **Library > Files**.
2. If you're viewing the File Library in Icon view, click on a file thumbnail to select it. You should see a checkmark in the upper right of the thumbnail once you've selected it:



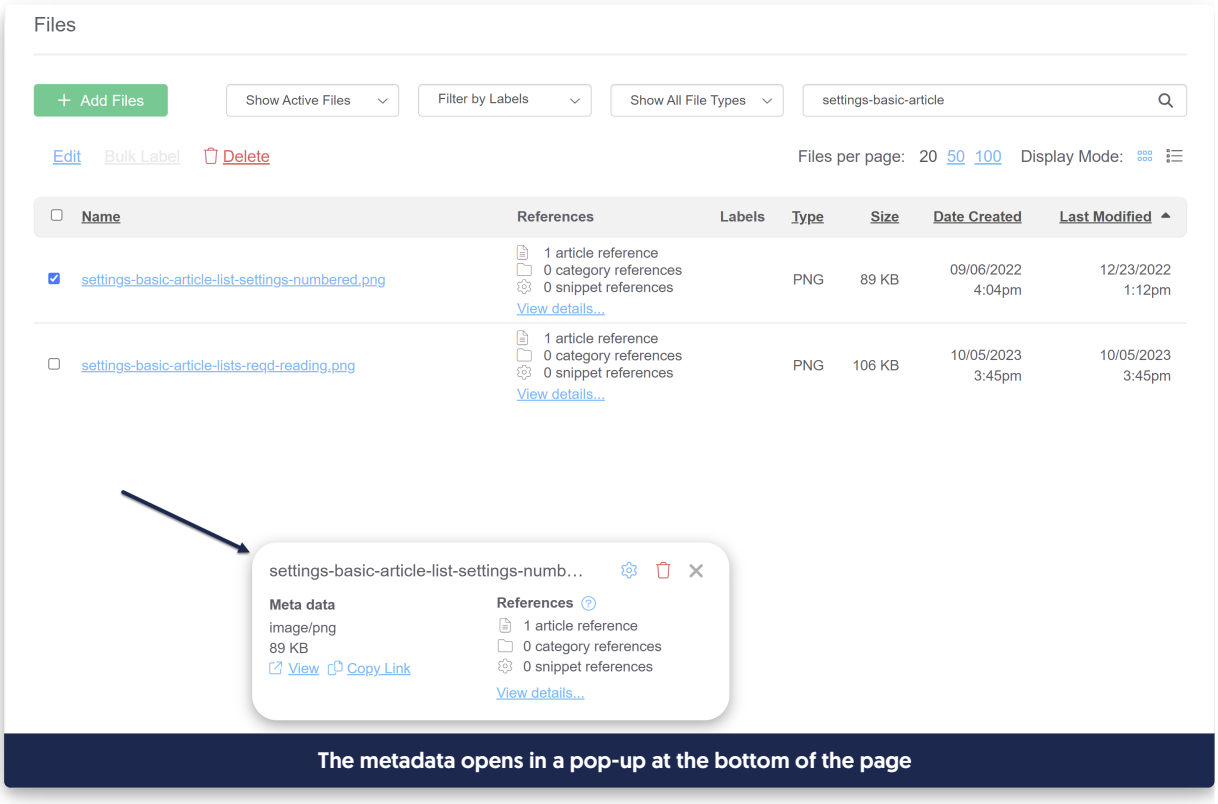
The checkmark in the upper right indicates this file is selected

3. If you're viewing the File Library in List view, click anywhere in the file's row or click the checkbox to the left of the file name to select it. You should see a checkmark to the left of the file's name once you've selected it:



The checkmark to the left of the file's name indicates this file is selected

4. **This will open the details of the file in a pop-up at the bottom of the page.**



5. **Click the Copy Link link to copy the URL to your clipboard.**



File references

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Any time a file is used, we track the reference so that you know whether it's safe to delete that file.

File references are tracked for:

- **Articles**
  - Article body content: will check all draft articles and published articles. Will not check inactive article versions.
  - Article URL redirect
  - Article thumbnail
  - Article banner
- **Categories**
  - Category URL redirect
  - Category icon
  - Category description
  - Custom content category body
  - Category thumbnail and banner (for custom content categories and topic display categories)
- **Snippet** body content
- **Theme**
  - **Settings > Style** logo
  - **Settings > Style** favicon
  - **Settings > Style** Custom HTML templates
  - **Settings > Style** Custom CSS
- **Other**
  - **Homepage**

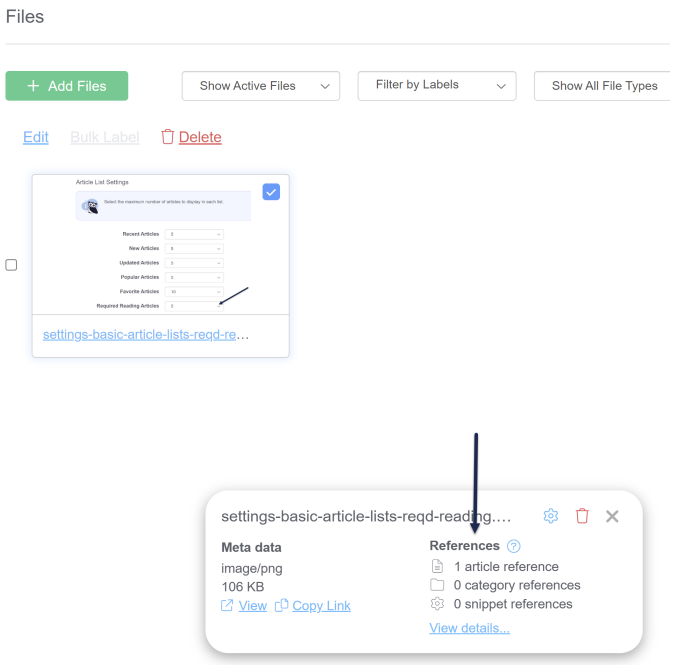
The file references will update once you save changes on any of these pages.



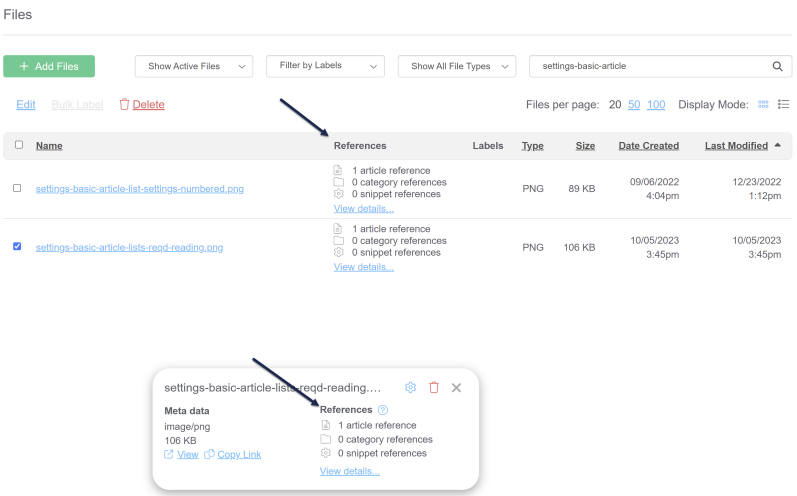
Limitations
Refer to Limitations for some use cases where references aren't tracked.

You can view the file references in **Library > Files** in two places:

- In the Thumbnail View, when you select an individual file, the references are displayed in the file metadata displayed at the bottom of the page:



- In the **List View**, References is included as its own column . Selecting an individual file in this view will also display the references in the file metadata at the bottom of the page:



In either location, click the **View details...** link to open a pop-up that will display a detailed hyperlinked list of all the references. The references will display in 5 sections:

- **Theme References**: Contains references in **Settings > Style**, including the logo, favicon, Custom HTML templates, and Custom CSS.
- **Article References**: Contains references within article body, URL redirect, banner, thumbnail. Each article includes a badge that displays the article's current publishing status.
- **Category References**: Contains references within category description, icon, URL redirect, etc. Each category includes a badge that displays whether it's active or deleted.
- **Snippet References**: Contains references within snippet body. Each snippet includes a badge that displays whether it's active or deleted.
- **Other References**: Contains references within **Homepage** custom content editor.

Here's a sample showing references in all areas:

Sample file References list showing all possible references.

You should be able to safely delete any files which show 0 references for all reference options. This also lets you track down all the places a file is used in case you need to update content relating to it!

Limitations

There are a few limitations to using the file references:

1. **Files used in snippets:** Files used in snippets only list the snippet reference. They won't list all the places that snippet may be referenced.

   Suggested workaround
   If a file has **Snippet References**, you should also check the Snippet references to see where the file might be used.

2. **Only files in this knowledge base:** File references will track references to the file within the **same knowledge base** the file is stored within. If you have multiple knowledge bases and the file is used in other knowledge bases, those references aren't tracked.

   Suggested workaround
   Add a file label or some other method to alert yourself not to delete files referenced by other KBs. For example, we use "used by [other KB name]" and "do not delete" for files we reference in other knowledge bases.

Restoring deleted files

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Sometimes, you delete the wrong file by accident--maybe you didn't realize you'd selected an entire row of files, or two files are named identically and you deleted the wrong one.

KnowledgeOwl allows you to restore files you've deleted. Restoring files will:

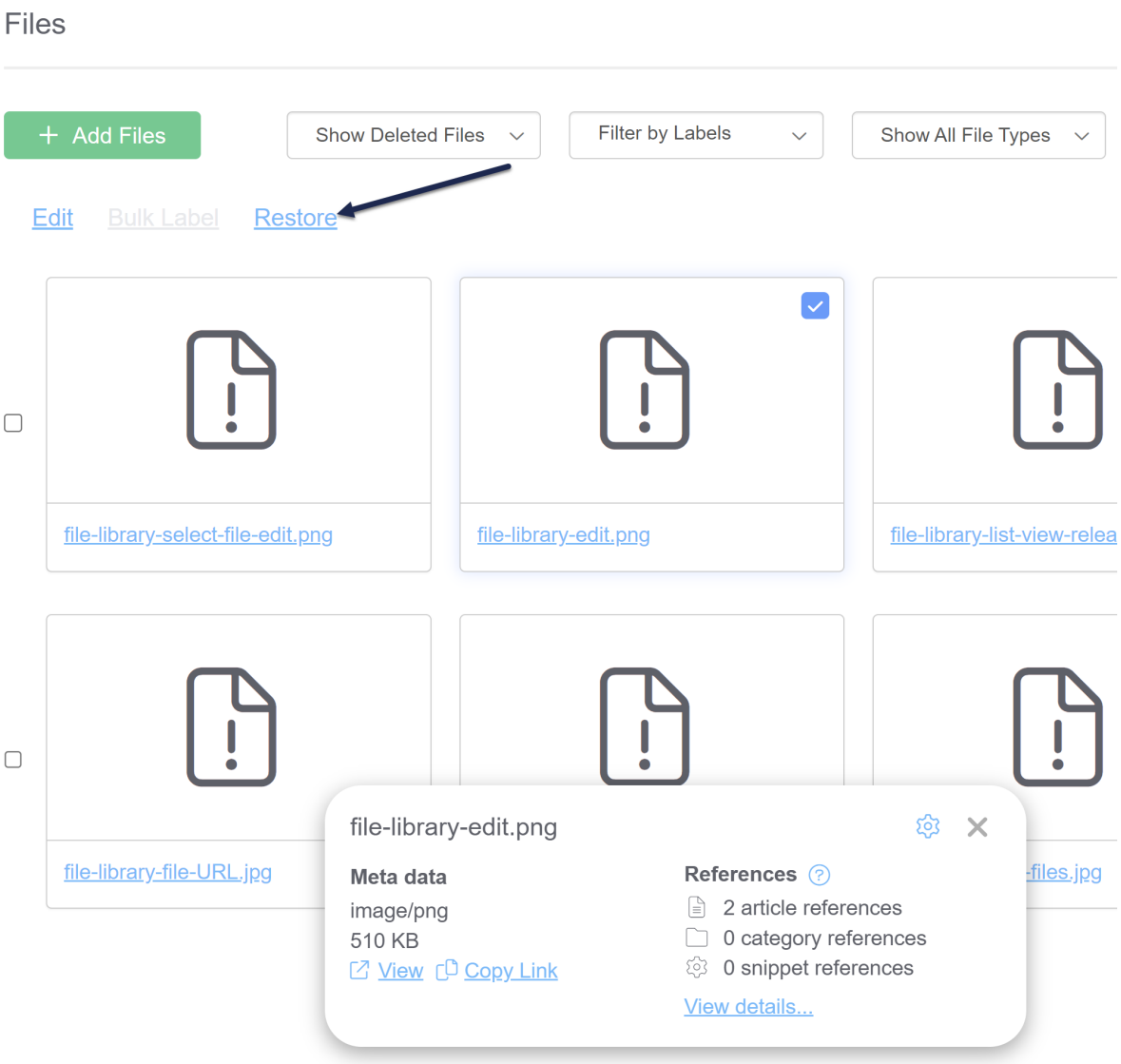
- Restore access to them by the original URL
- Restore any links to files using that original URL
- Add the file back to your main **Library > Files** view
- Add the file back into the **Add from Library** search within the editor

To restore deleted files:

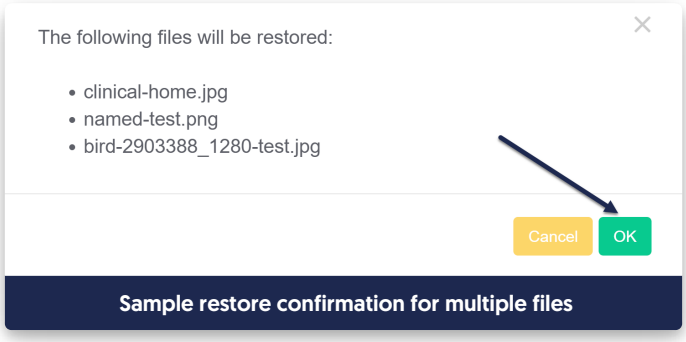
1. Go to **Library > Files**.
2. The first dropdown defaults to "Show Active Files". Select the second option from this dropdown: **Show Deleted Files**.



3. This will display all deleted files in your File Library, with the most recently deleted listed first. You can use the other dropdown filters or the search to locate the file(s) you'd like to restore.
4. For each file you'd like to restore, select the file.
    a. In icon view, click anywhere in the file thumbnail to add a checkmark in the upper right. To restore an entire row of files, click the checkbox to the left of the row.
    b. In list view, click anywhere in the file's row to add a checkmark to the left of the file. To select all files within a filter/search, check the box in the upper left next to the **Name** column header.
5. Once you've finished selecting the files, click the **Restore** link in the upper left.



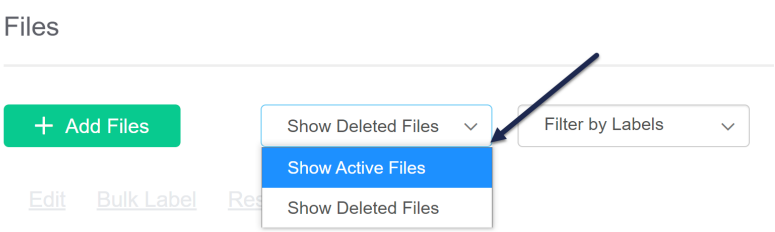
6. **You'll see a confirmation message. For a single file, it will ask if you want to restore "this" file; for multiple files, you'll see a list of the files selected. Click OK to confirm the restoration.**



Sample restore confirmation for multiple files

7. **When the restoration is complete, the view of the deleted files will update and the restored file will no longer show in that view.**

8. **You can now use the dropdown at the top to Show Active Files and the restored file will be there.**


Files
Add Files
Show Deleted Files
Filter by Labels
Show Active Files
Show Deleted Files
Edit
Bulk Label

Purge and fully remove files

Last Modified on 05/29/2024 5:28 pm EDT

By default, when you delete a file in the File Library, KnowledgeOwl doesn't fully delete this file--you can still see it and restore it.

However, there are times when you might want to fully purge or remove deleted files in a knowledge base:

- Just to keep things tidy/avoid confusion
- Due to a GDPR request or other incident

Our support team can run a full purge of all deleted files in your File Library. If you need this service, please contact us and let us know which knowledge base you'd like to purge all deleted files from. Once purged, files will no longer appear within your File Library.

Behind the scenes, we move these files to a different storage location for 30 days. We can recover them during that 30-day window, but after 30 days, they are fully deleted from all of our systems and are **not** recoverable, so use this service with caution!

Manage files with file labels

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Similar to tags in articles, you can add **labels** to files so that you can filter the File Library more easily.

File Labels:

- Are only visible to authors with access to the File Library in app.knowledgeowl.com
- Can be used as filters in the File Library
- Can be added to/removed from files in the File Library
- Can be created in the Files Library or in the File Label Library
- Can be edited, deleted, and merged in the File Label Library

For more information, see File Labels.

Use labels as filters

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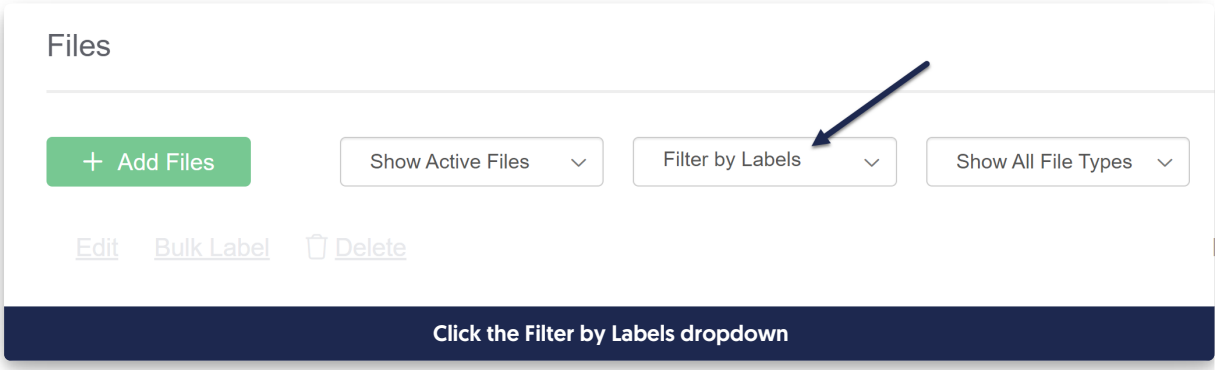
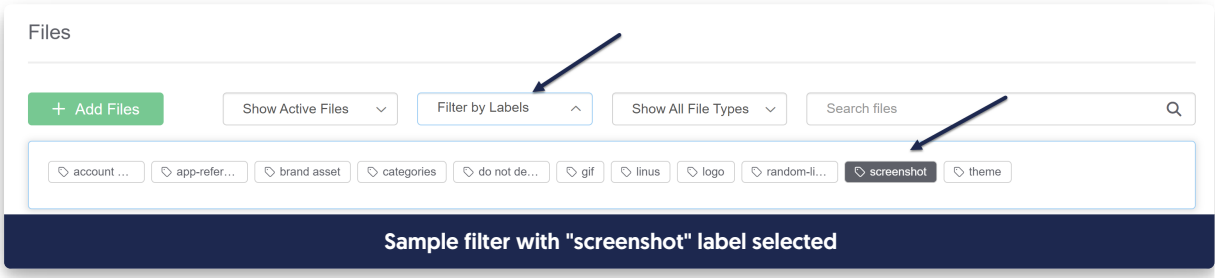
Once you have added file labels to your files, those file labels can be used to filter your File Library. To do so:

1. Go to **Library > Files.**
2. Click the **Filter by Labels** dropdown.



Click the Filter by Labels dropdown

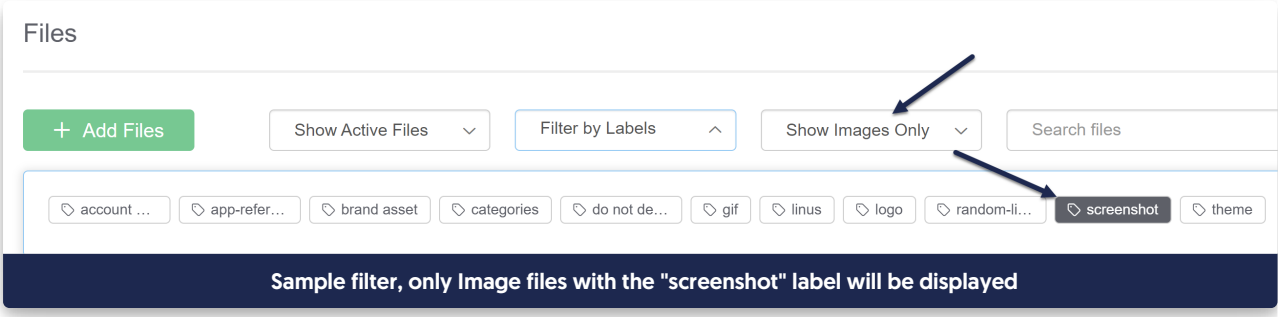
3. Select the label(s) you'd like to use as filters. If you select more than one label, only files with all the selected labels will be displayed.
4. Once you select a label, the File Library display will update to show only the files with that label. Here, I've selected "screenshot":



Sample filter with "screenshot" label selected

5. To remove a label from your filter, click on it again to deselect it. (Or reload the page.)

You can combine the labels filter with the file type filter and search, too.



Sample filter, only Image files with the "screenshot" label will be displayed

Who can access the files stored in my knowledge base?

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The Security Settings for your knowledge base (**Settings > Security**) determine the general security requirements for readers to access your knowledge base.

The files you upload to your knowledge base--PDFs, Excel sheets, screenshots, Word documents, etc.--do not automatically use this same security.

By default, even if your knowledge base requires login, the files you've uploaded do *not* require login. This is by design so that you can give customers the link to specific documents and they can easily download the file by clicking on that link or URL without having to log in to your knowledge base.

However, you can adjust your security settings so that readers have to be logged in to access files and images stored within your knowledge base.

What are tags?

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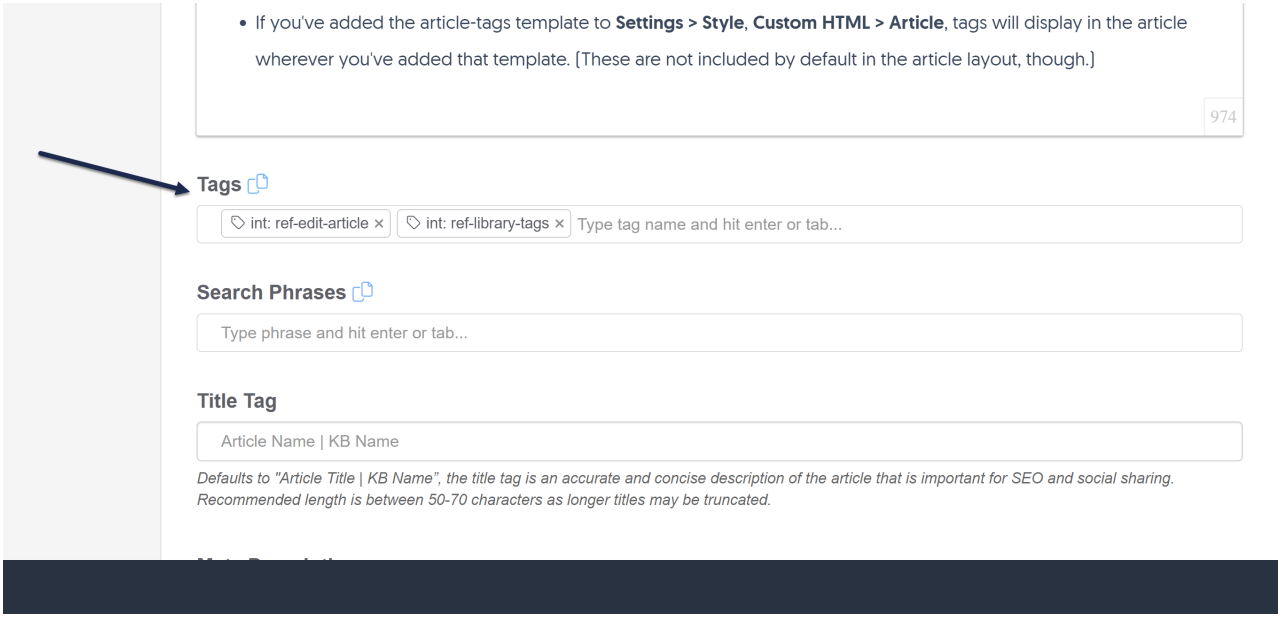
A tag is a word or short phrase that "describes" the article. An article may have as many tags as you like. They can be a great way to add organization and navigation to your knowledge base.

The easiest way to think about tags is to consider them like filters for your content. These filters can be used:

- **By your readers using a tag search (which begins with ":" followed by the tag name)**
- **As custom filters in Knowledge Base > Manage: if you're using tags for these kinds of internal filters only, you can mark tags as "hidden" so they won't show up to readers**



For readers, tags will display:

- **In search results, in a Tags section between the Last Updated and the article blurb**

1. **SSO FAQs**
   Last Updated: 09/09/2021 in Security and permissions » Single sign-on (SSO)
   Tags: sso remote auth
   How does **SSO** work with user permissions? ... Our SAML **SSO** and remote authentication setups support this. ... **SSO** can be used in combination with other authentication methods.

- **In the search autocomplete after they've begun a search phrase with a colon (":")**



- **If you've added the article-tags template to Settings > Style, Custom HTML > Article, tags will display in**

the article wherever you've added that template. (These are not included by default in the article layout, though.)

Create a tag

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You can create tags in three ways:

- In **Library** > **Tags** using the **Create** link.
- In any article or category editor view, by typing into the Tags box and hitting Enter
- In any article or category editor view, by pasting a comma-separated list of tags into the box and hitting Enter or tab. (example: alpha,bravo,charlie pasted in will create three tags: alpha, bravo, and charlie)

Our default **Editor** and **Writer** roles have permission to create tags. If you're using a custom author role, that role must have the Tag Permission to **Add new tags** to create tags.

Tags can contain:

- Upper and lowercase a-z
- Numbers
- Spaces
- Special characters: dash (-) , underscore (_), pound sign/hashtag (#), equals sign (=), @ symbol, exclamation point (!), period (.), comma (,) quotation mark ("), apostrophe ('), colon (:), forward slash (/)

Other special characters (especially ? , + , * , & , ^ , \ , and $) will cause errors with tag search functionality

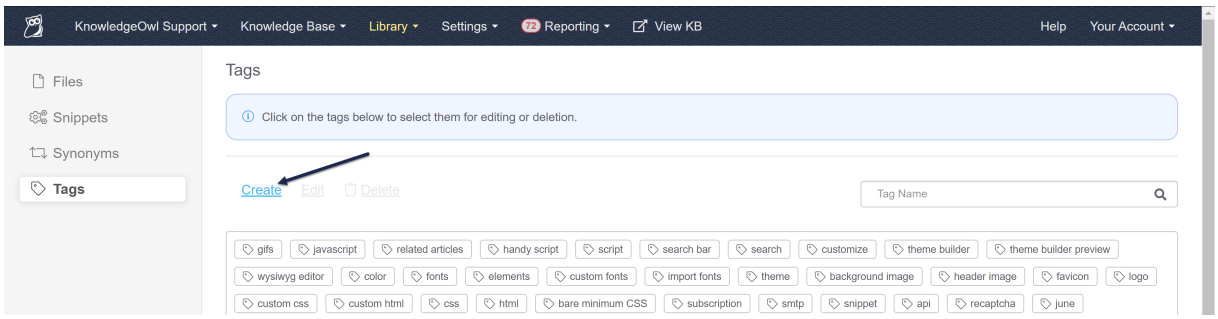
Create tags in Tag Library

Creating tags in the Tag Library can be great if you:

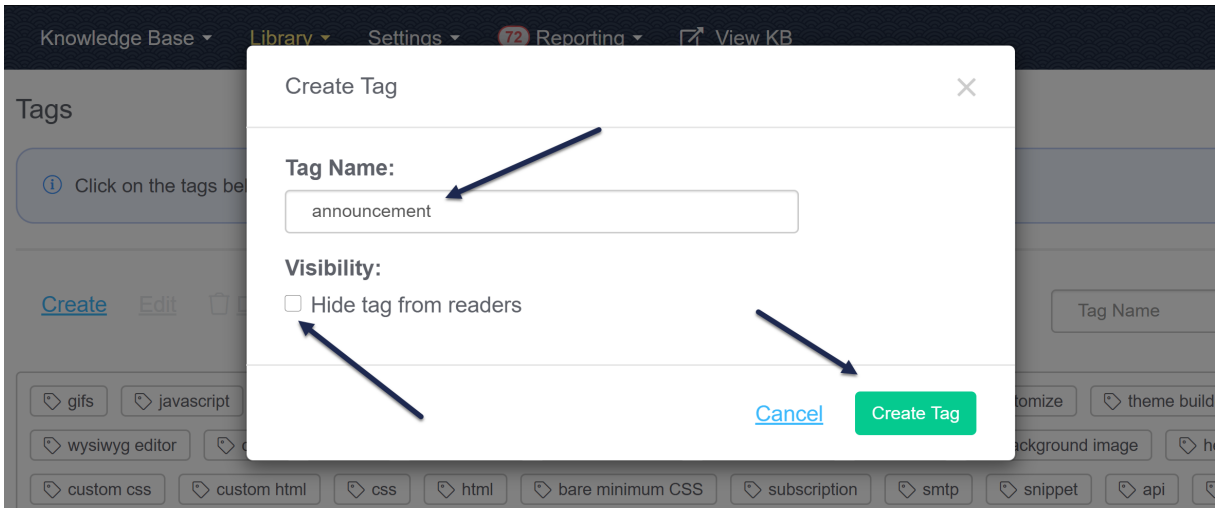
- Need to create a lot of tags at once
- Want to be able to see tags that already exist while you create tags
- Want to be able to create the tag and mark it as internal/hidden from readers

To do so:

1. Go to **Library** > **Tags**.
2. Click the **Create** link near the upper left of the screen.



3. This will open the Create tag pop-up. Add the **Name** you'd like displayed for the tag. If you'd like to use this tag only within app.knowledgeowl.com, check the box under **Visibility** to "Hide tag from readers". If you don't hide from readers, the tag will be visible in search and, potentially, in your article itself, depending on your configuration. See What are tags? for more information.
Here, I've created an "announcement" tag that will be visible to all readers:



4. Once you've finished editing the tag, click the **Create Tag** button. The tag will be added to your library and immediately available for use.

Create tags in the editor individually

You can also create tags on the fly while you're editing an article, topic display category, or custom content category.

To do so:

1. In the article editor and in select category editors (topic display and custom content), click in the **Tags** input box below the editor.
2. To add one tag at a time, type the name of your new tag.
3. Then hit Enter, tab, or comma, or click outside of the box.



Sample tag creation in Article Editor

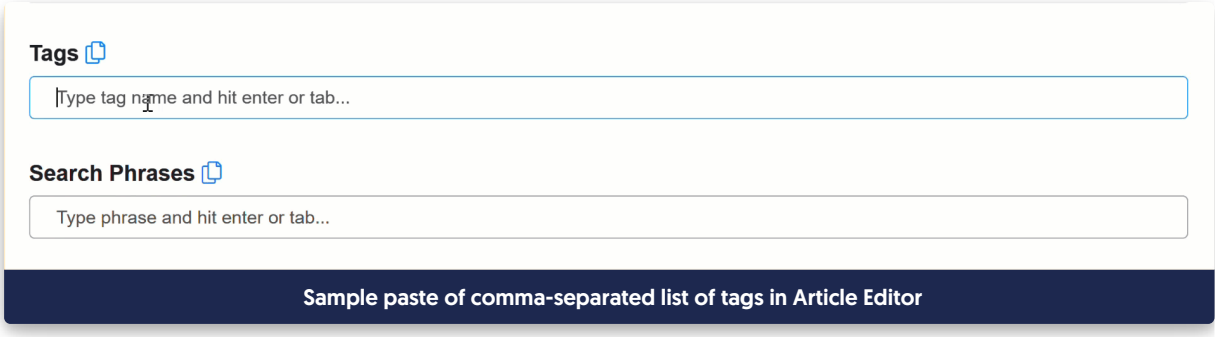
4. The tag(s) will be created in the Tag Library and added to this article.
5. Be sure to **Save** your article once you're done.

Create tags in the editor in bulk

You can add a list of tags separated by commas while you're editing an article, topic display category, or custom content category. This can be a great way to create or add tags in bulk.

To do so:

1. In the article editor and in select category editors (topic display and custom content), click in the **Tags** input box below the editor.
2. Type or paste in the list with each tag separated by a comma. For example: alpha,bravo,charlie,delta



Sample paste of comma-separated list of tags in Article Editor

3. Hit Enter or tab, or click outside of the box.
4. The tags will be created in the Tag Library and added to this article.
5. Be sure to **Save** your article once you're done.

Edit a tag

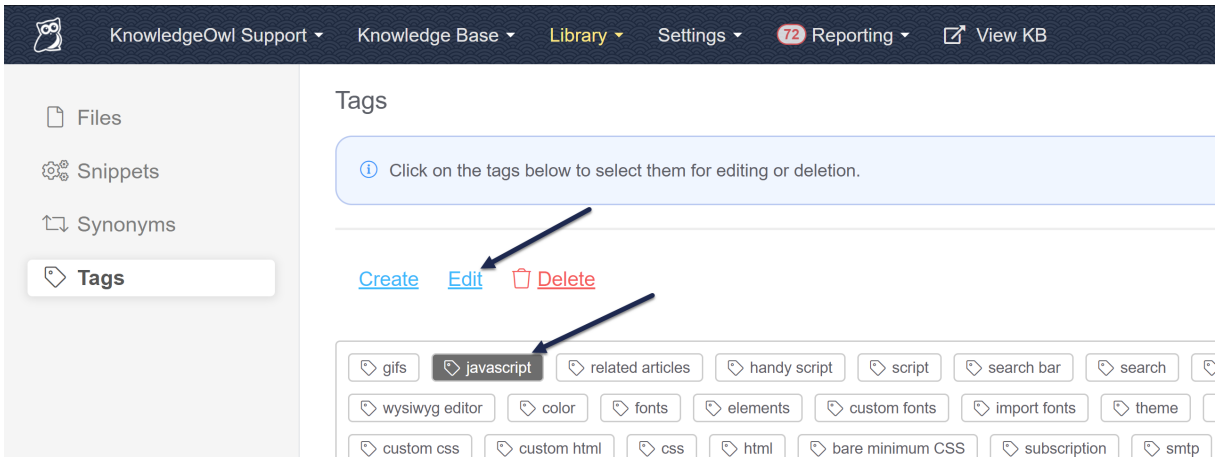
Last Modified on 05/29/2024 5:28 pm EDT

Once a tag has been created, you can edit it to update the name or change whether it's shown or hidden to readers.

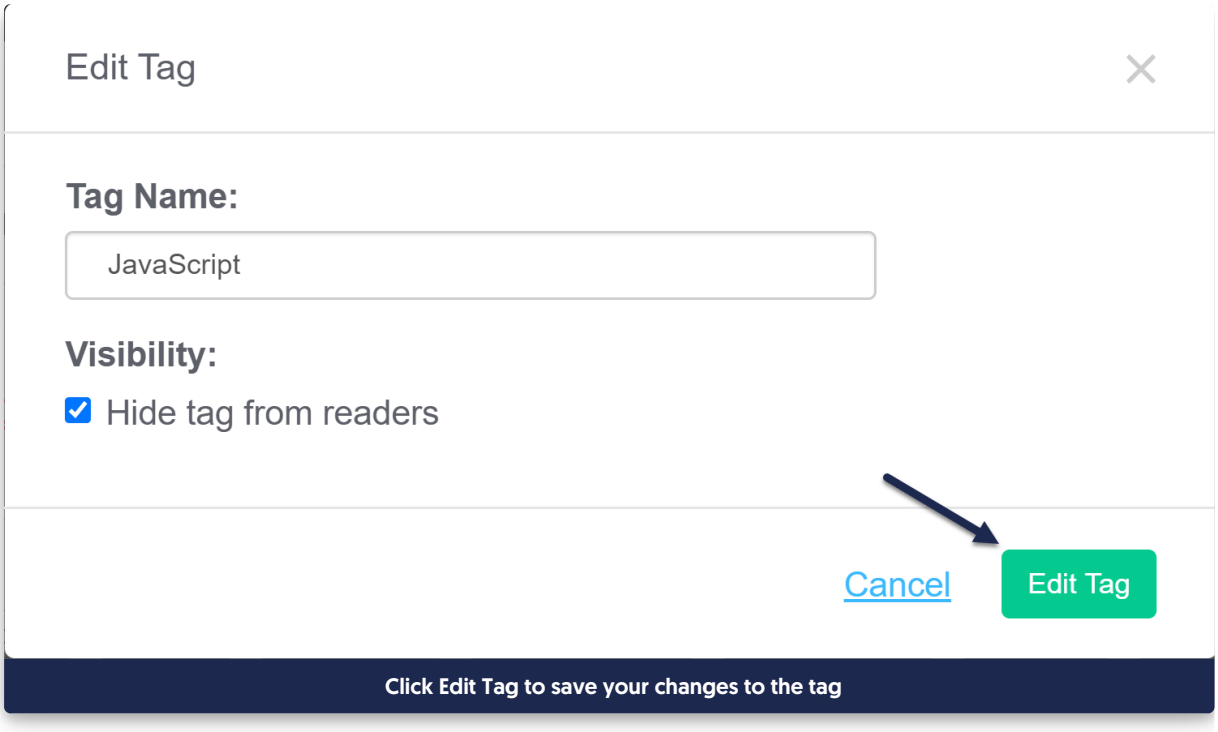
Our default **Editor** and **Writer** roles have permission to edit tags. If you're using a custom author role, that role must have the Tag Permission to **Edit exiting tags** to edit tags.

To do so:

1. Go to **Library > Tags**.
2. Click on the tag you'd like to edit. (If you have a lot of tags, you may need to search to find the tag you want.)
3. Once you've clicked on a tag, the **Edit** link will activate. Click that link.



4. This will open the Edit Tag pop-up, where you can edit the name of the tag or check the box to hide it from readers (use it only in app.knowledgeowl.com).
5. Once you've finished making the changes to your tag, click the **Edit Tag** button in the lower right to save your changes.



6. **All articles with this tag will now display the updated name.**

Delete a tag

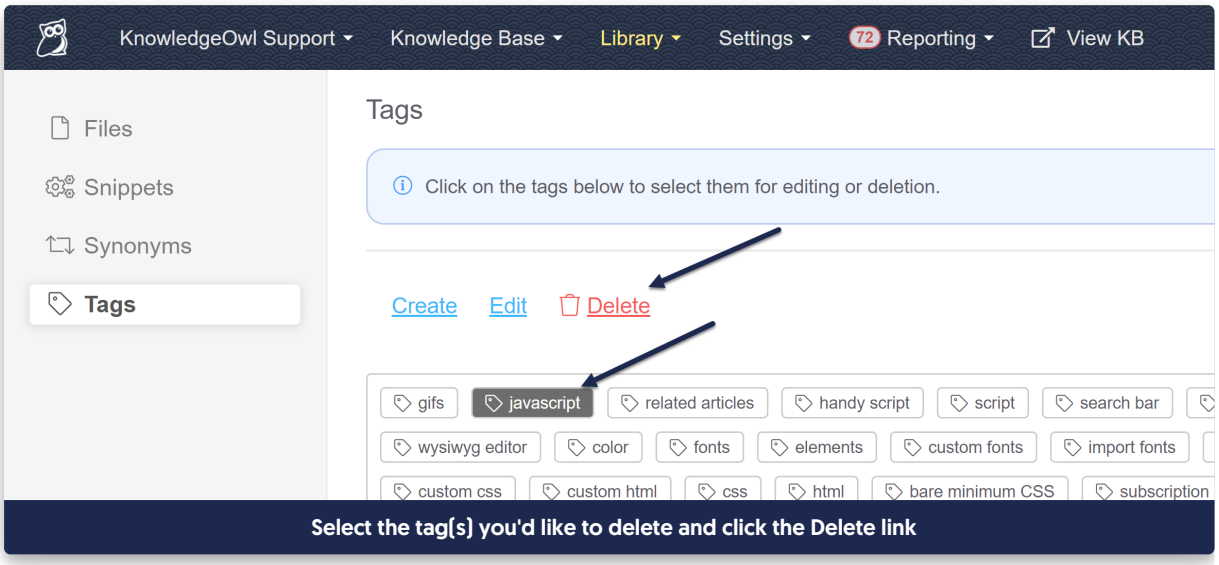
Last Modified on 05/29/2024 5:28 pm EDT

Once a tag has been created, you can delete it from the Tag Library. This will remove the tag from all articles or categories where it's been used.

Our default **Editor** and **Writer** roles have permission to delete tags. If you're using a custom author role, that role must have the Tag Permission to **Delete tags**.

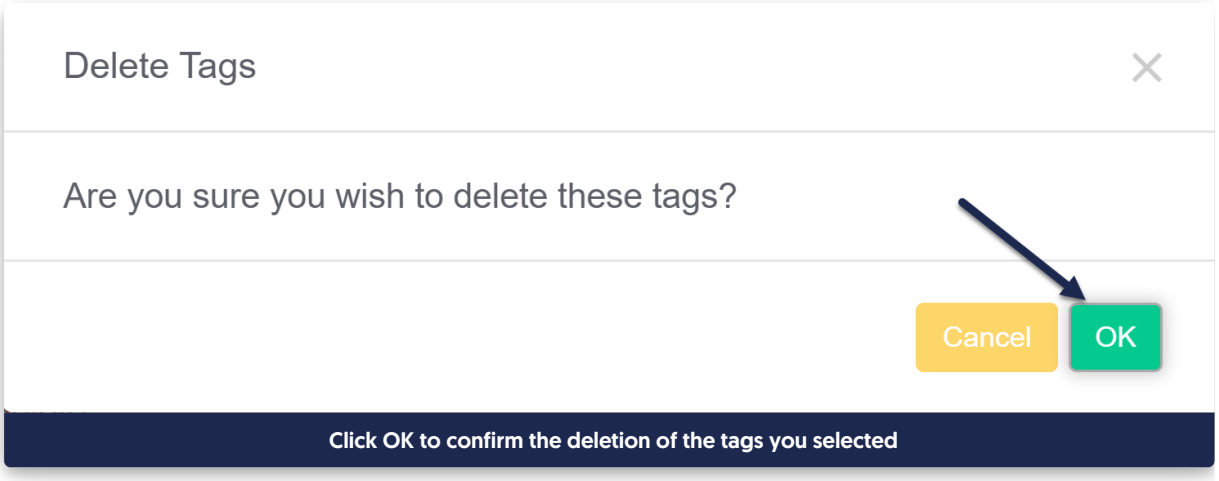
To do so:

1. Go to **Library > Tags**.
2. Click on the tag or tags you'd like to delete. (If you have a lot of tags, you may need to search to find the tags you want.)
3. Once you've clicked on one or more tags, the **Delete** link will activate. Click that link.



Select the tag(s) you'd like to delete and click the Delete link

4. This will open a confirmation pop-up to be sure you want to delete these tags. Click **OK** to delete them.



Click OK to confirm the deletion of the tags you selected

5. **All the tags you selected will be deleted and removed from any articles or categories that referenced them.**

Add an existing tag to an article

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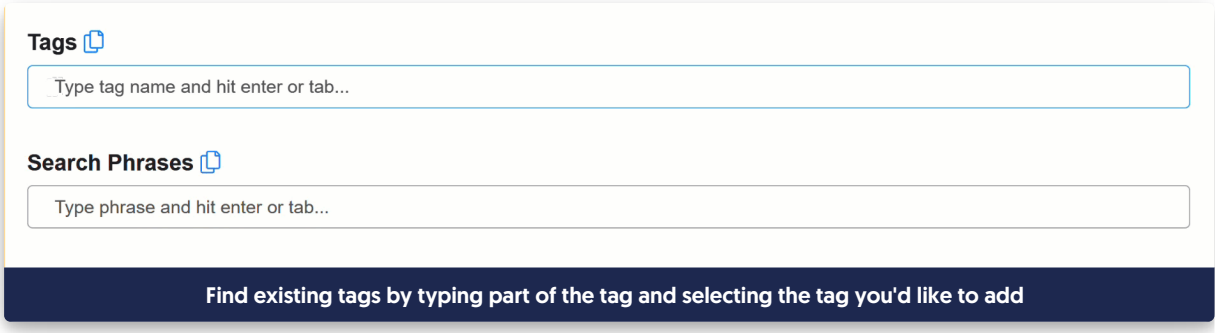
Creating a new tag is not always the same thing as adding a tag to an article.

Our default **Editor** and **Writer** roles have permission to add existing tags to articles and to create new tags. If you're using a custom author role, that role must have the Tag Permission to **Add existing tags to articles** but might not have the ability to **Add new tags**. (If you have both permissions, you can start typing and then create a new tag or select an existing; if you only have the ability to add existing tags to articles, you can only start typing and select from existing tags.)

To add an existing tag to an article:

1. In the article editor and in select category editors (topic display and custom content), click in the **Tags** input box below the editor.
2. Start typing the name of the tag. As you type, you'll get a list of autosuggested matching tags. You can use the arrow keys + Enter or click with your mouse to select the tag you'd like to add.



3. Once you've finished adding tags, be sure to **Save** the article or category you're working in.

Pro-tip: You can also add existing tags in bulk by pasting in a comma-separated list. For example, pasting in "alpha,bravo,charlie,delta" will add the tags "alpha", "bravo", "charlie", and "delta". If you paste in a tag that is already added to the article, the duplicate is detected and removed. See Create a tag for more details.

Remove a tag from an article

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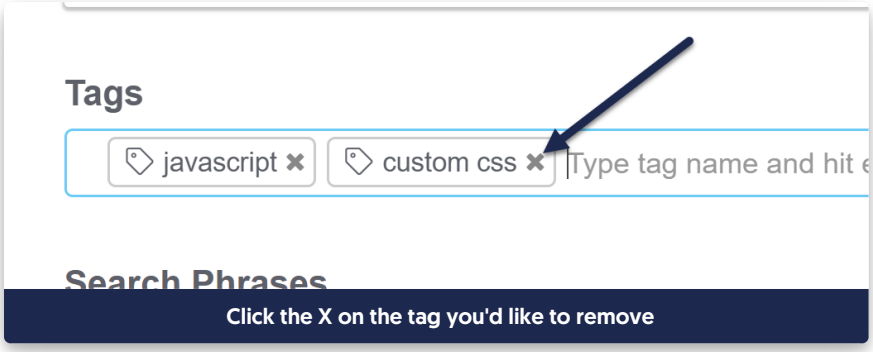
Removing a tag from an article simply removes it from the article--it doesn't delete the tag from your knowledge base. If you'd like to delete a tag from your knowledge base completely, see Delete a tag.

Our default **Editor** and **Writer** roles have permission to remove existing tags from articles (and to delete tags completely). If you're using a custom author role, that role must have the Tag Permission to **Remove tags from articles** but might not have the ability to **Delete tags**.

To remove a tag from an article:

1. In the article editor and in select category editors (topic display and custom content), scroll to the **Tags** input box.
2. Click the x next to the tag you'd like to remove.



3. Be sure to **Save** the article or category.

Tags in searches

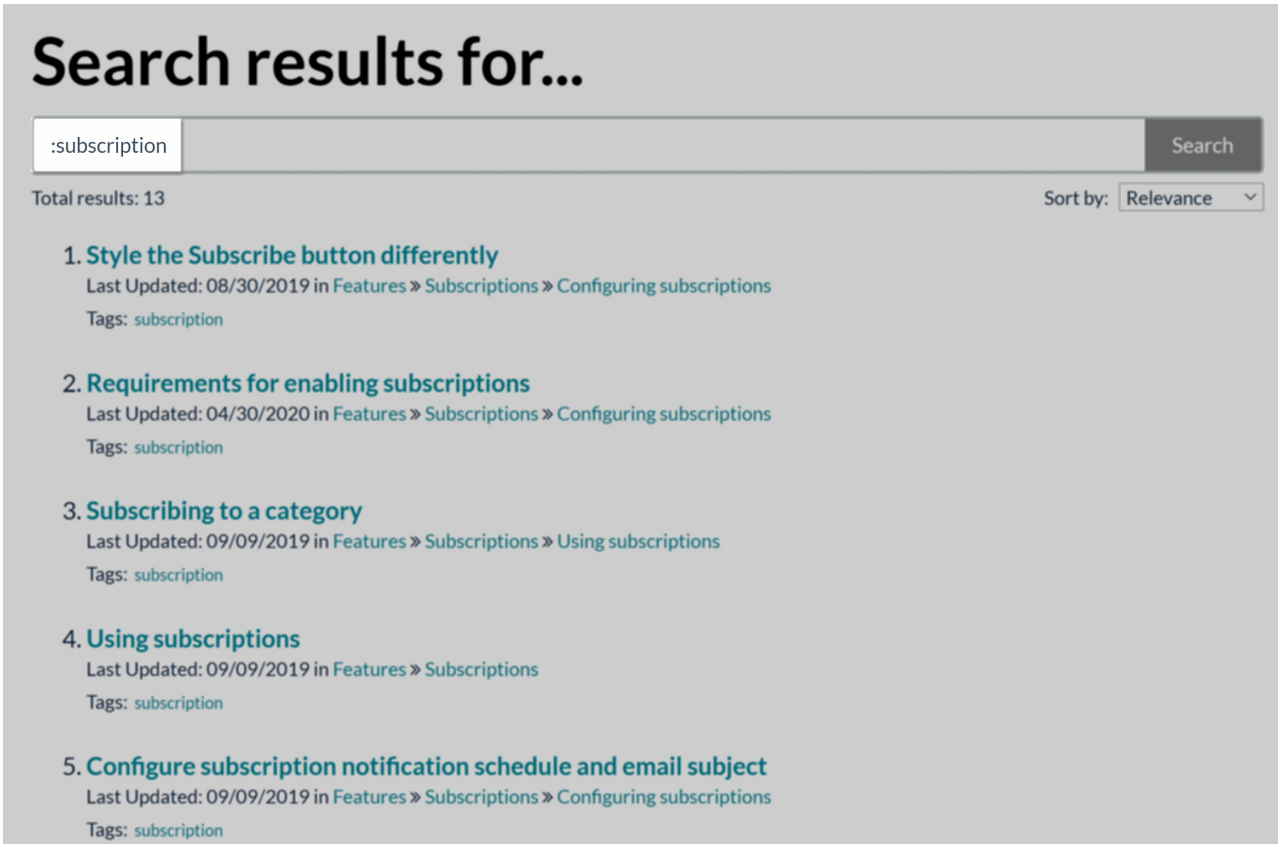
Last Modified on 05/29/2024 5:28 pm EDT

Tags are displayed in search to give the reader additional context as to what the article is about and what it relates to. A reader can click on a tag to navigate to a list of all articles with that tag.

1. Requirements for enabling subscriptions
   Last Updated: 04/30/2020 in Features » Subscriptions » Configuring subscriptions
   Tags: subscription
   Edit your **subscription** settings to enable **subscriptions** . ... third party SMTP server to send **subscription** emails. ... Note : You must complete steps 1-3 for **subscriptions** to work properly.
2. Enable subscriptions
   Last Updated: 09/05/2019 in Features » Subscriptions » Configuring subscriptions
   Tags: subscription
   and added a reCAPTCHA), you're ready to turn on **Subscriptions**. ... Just check the box next to Enable reader **subscriptions** and click Save . ... Do not enable reader **subscriptions** until you have, at minimum, configured your SMTP settings.
3. Subscribing to a category
   Last Updated: 09/09/2019 in Features » Subscriptions » Using subscriptions
   Tags: subscription
   the **Subscribe** button: This will take you to the Manage **Subscriptions** page. ... When **subscriptions** are enabled, you can **subscribe** to receive email notifications when categories have ... either open a pop-up for you to enter your email address into, or take you directly into your Manage **Subscriptions**
4. Configuring subscriptions
   Last Updated: 05/07/2020 in Features » Subscriptions
   Tags: subscription

Sample search results with tags displayed

Clicking on a tag performs a special operation in the search that bypasses the regular search and returns a list of all articles with the same tag. You can manually perform a tag search by putting a colon in front of the tag name, like this:



See Tag Searches for more information on how tag search works.

Don't want a tag to show up in search results? Set it to be hidden from readers: see Hide tags from Search Results for more information!

Listing articles by tag

If you like, you could get really fancy and create a link that lists all articles with a certain tag. The link would look something like this, replacing "flying" with your tag.

/help/search?phrase=:flying

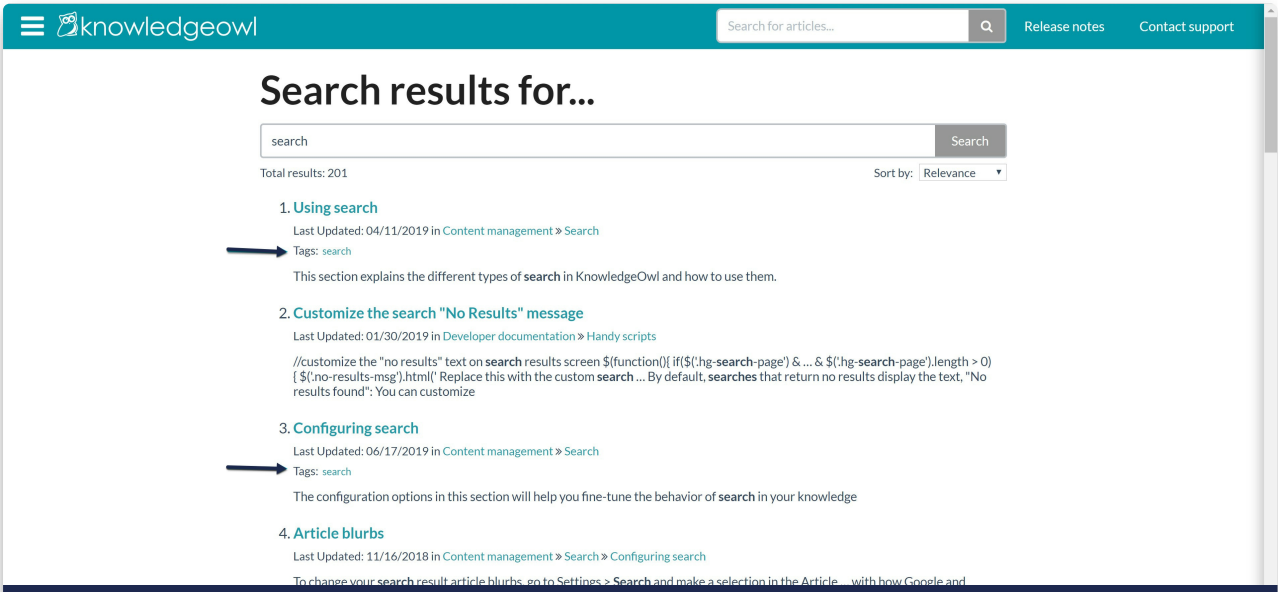
You may also need to replace "help" with "home" if that's how your knowledge base is set up.

For example, this link will search for the "subscription" tag referenced in the above screenshots: https://support.knowledgeowl.com/help/search?phrase=:subscription

Hide tags from Search Results

Last Modified on 05/29/2024 5:28 pm EDT

KnowledgeOwl search results will automatically display all tags assigned to a given article :



Sample of Tags showing in Search Results

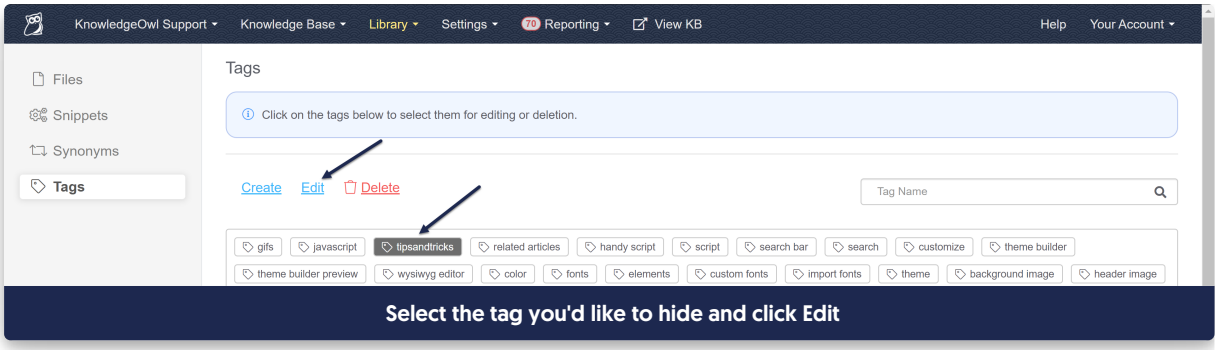
However, if you're using tags for custom filters in the Manage Articles interface, you might not want those internal tags to be shown in search results.

You can mark tags like this as hidden from readers. Hiding a tag from readers:

- **Keeps it visible in the article editor and category editor**
- **Allows it to be used as a filter in Manage Articles custom filters**
- **Prevents the tag from appearing in search results in your knowledge base**
- **Prevents the tag from appearing in the typeahead suggestions when a reader types ":" to begin a tag search**

To hide an existing tag from readers:

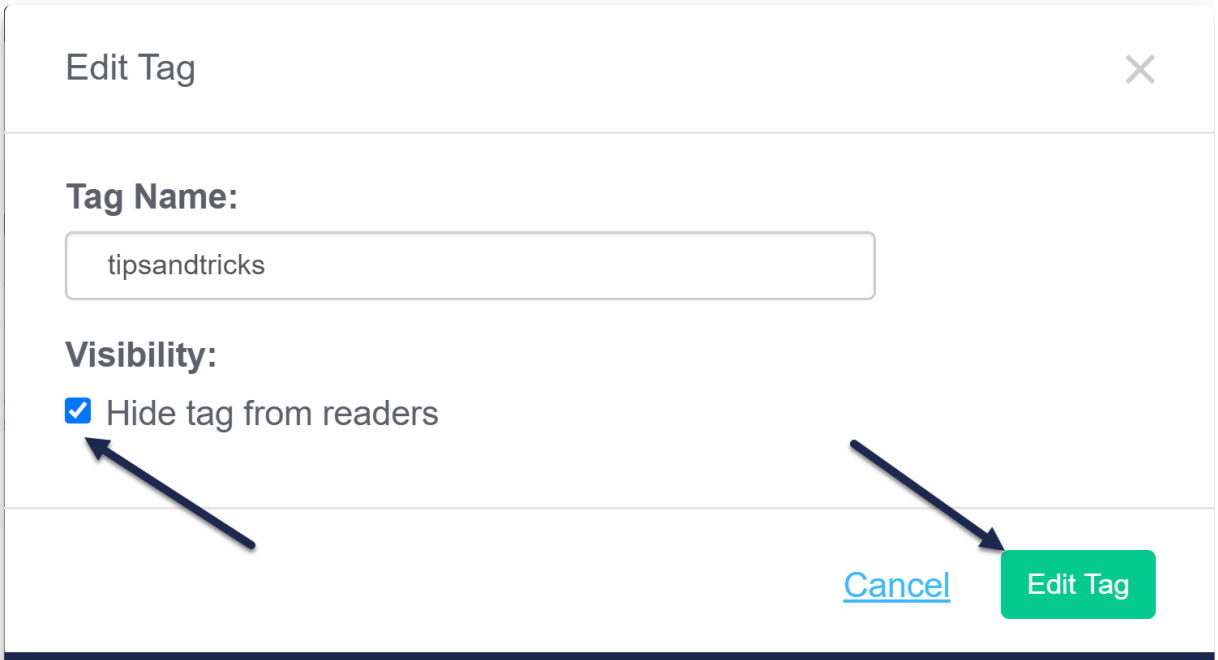
1. **Go to Library > Tags.**
2. **Click to select the tag you'd like to hide from readers.**
3. **Click on the Edit link.**



Select the tag you'd like to hide and click Edit

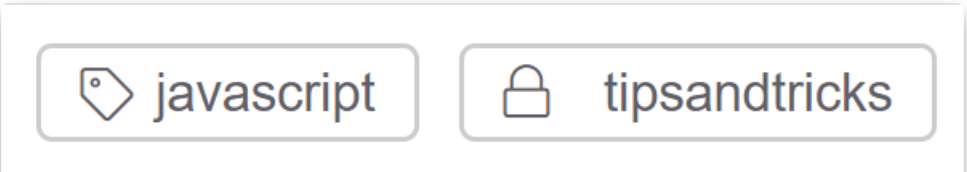
4. In the edit pop-up that appears, under **Visibility**, check the box next to "Hide tag from readers."

5. Click the **Edit Tag** button to finalize your changes.



Check the box to Hide tag from readers, then click Edit Tag to finalize your changes

6. Regular tags will have a normal tag icon in the Tags Library; tags hidden from readers will have a padlock icon. Here, "javascript" is a tag readers can see, and "tipsandtricks" is hidden from readers:



Sample tags; the tag on the left with the tag icon is viewable to readers; the tag on the right with the padlock is not

Merge tags

Last Modified on 05/29/2024 5:28 pm EDT

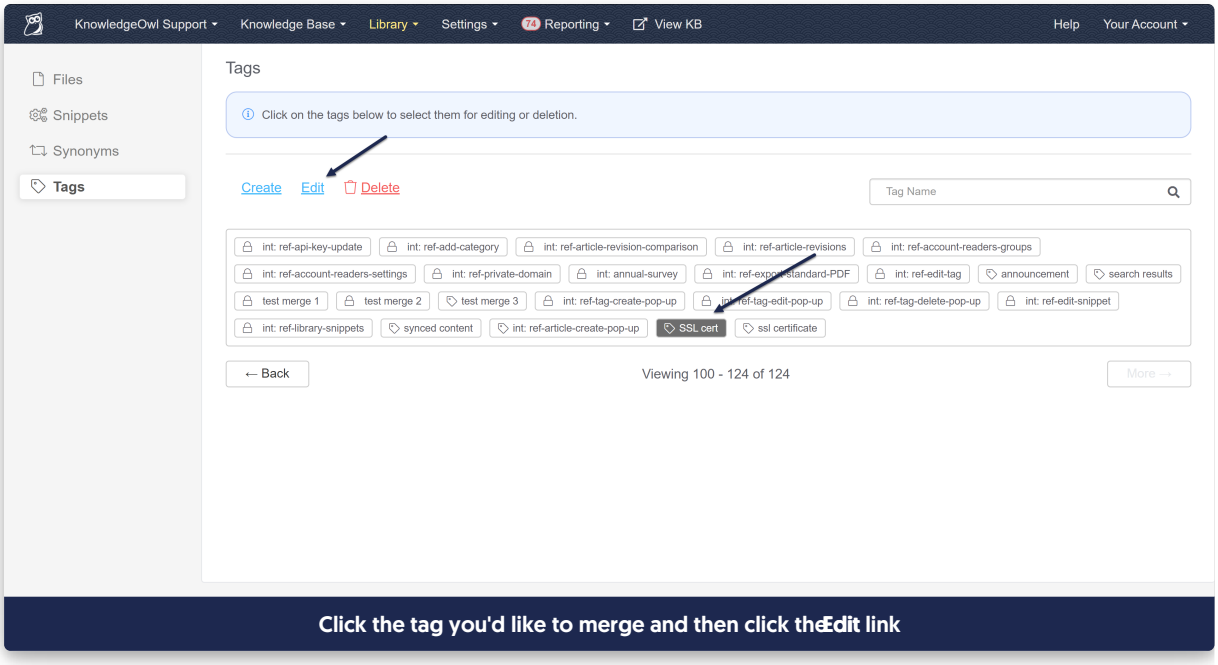
Like your product, company, and policies, tags might change over time. And without clear style guidelines (and even sometimes with them!), different authors might create differently-structured tags. Linus has faced this problem several times in our documentation, for example, some content was tagged with `SSL cert` and some was tagged with `ssl certificate`. What's an owl to do?

Users with our default **Editor** or **Writer** roles, or those with custom roles who have permission to both edit and delete tags have the option to merge two tags together.

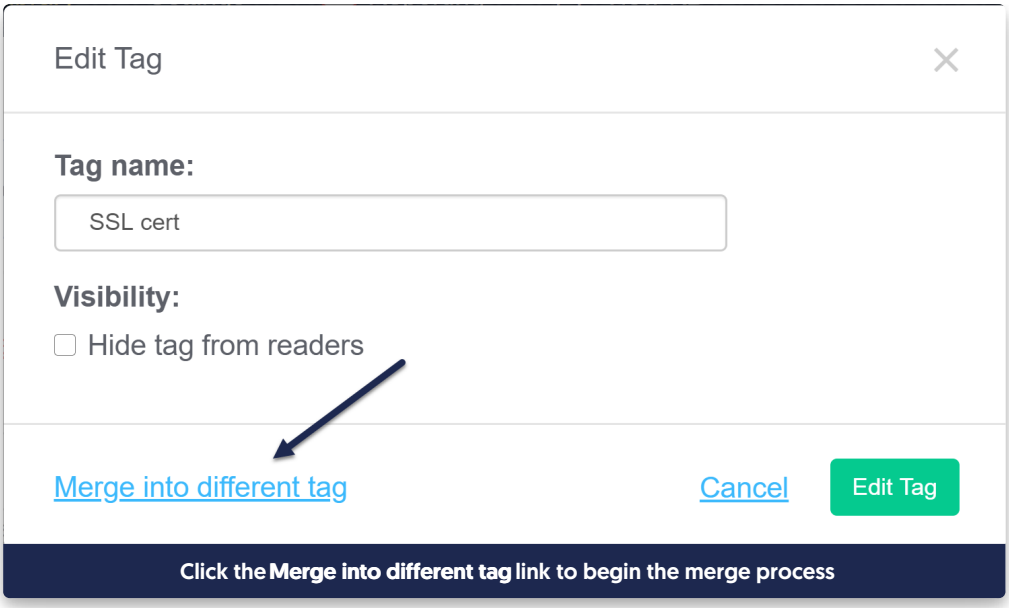
Merging allows you to replace one tag with the other and delete the now unneeded tag. It's fast and much easier than auditing articles through a Manage filter.

To merge tags:

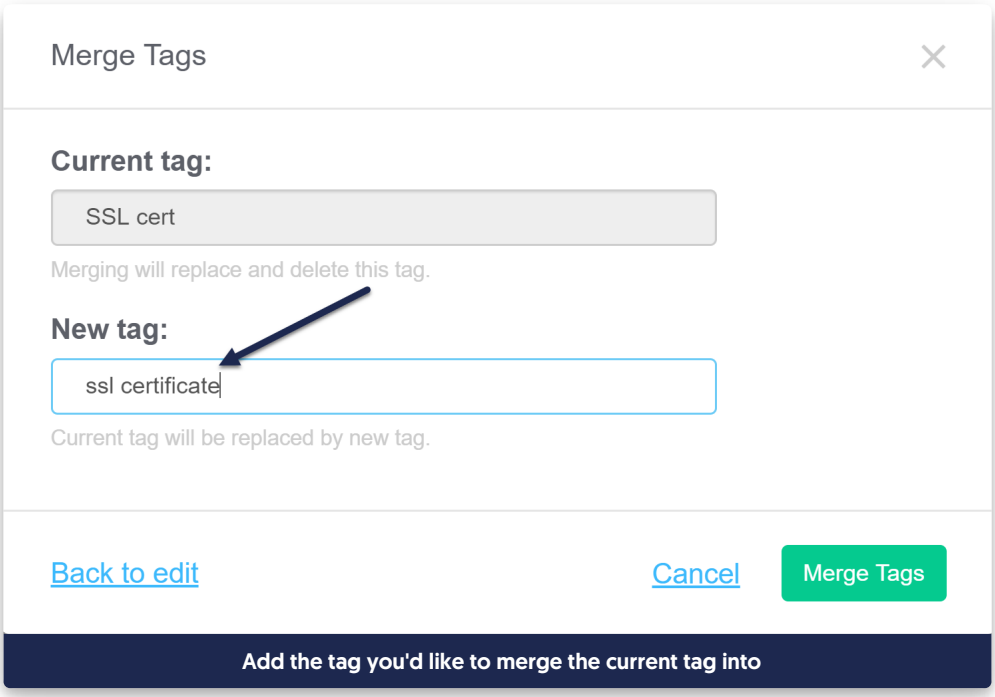
1. Go to **Library > Tags**.
2. Click on the tag you'd like to merge into another tag. This will be the tag that gets removed. Here, we'll use SSL cert and merge it into ssl certificate.
3. With the tag selected, the **Edit** and **Delete** links will become activated. Click on the **Edit** link.



4. This will open the Edit Tag pop-up. If you have the proper permissions to merge tags, you'll see a **Merge into different tag** option in the lower left. Click on this link.



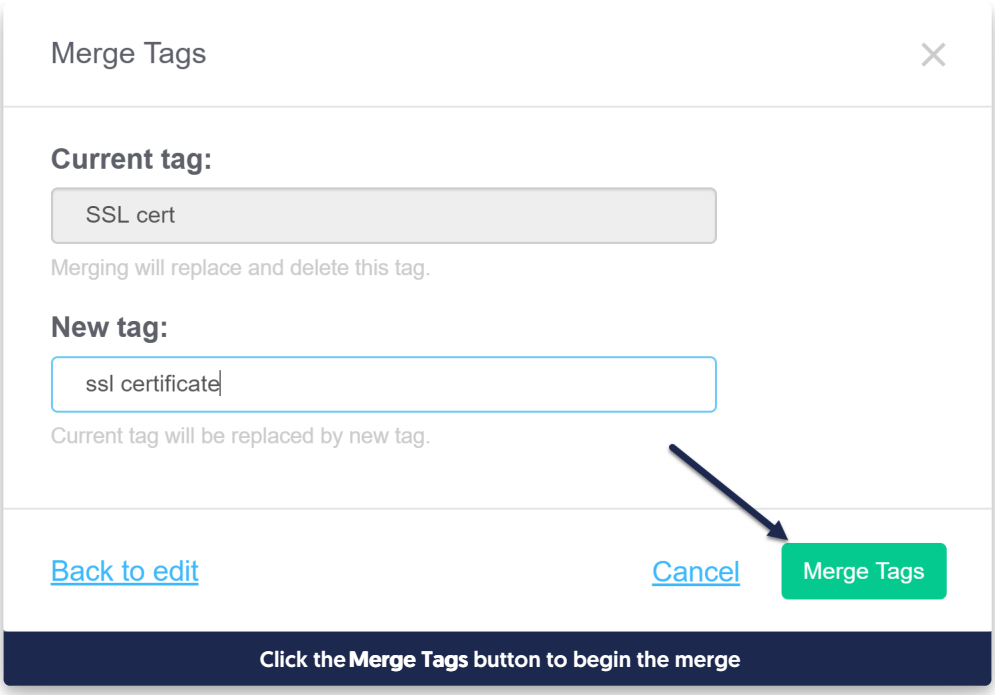
5. On the next screen, you'll be able to search for the "new" tag you'd like to merge this tag into. Start typing the name of the **New tag** you'd like to merge this tag into and select the correct name. Here, I'm using our ssl certificate tag as the new tag.



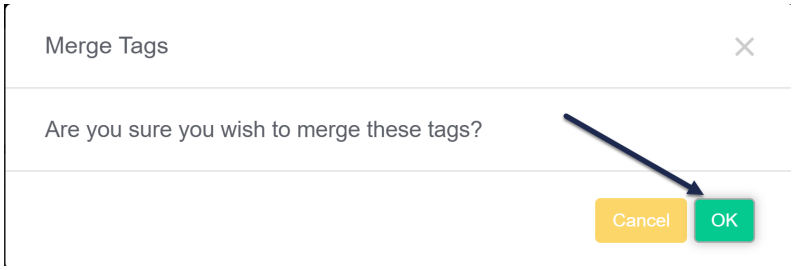
During the merge:

- **The "new tag" will be added to all of the current tag's articles. For example, all articles with "SSL cert" will get the "ssl certificate" tag added as part of the merge. It will also remain in your Tag Library moving forward.**
- **The "current" tag will be deleted from your Tag Library and all articles when the merge is complete. Any Manage filters including this tag will have the tag removed.**

6. **Once you've added the "New tag" you'd like to keep, click the Merge Tags button to begin the merge.**



7. **You'll see a confirmation message to be sure you want to merge these tags. Tag merges cannot be undone. Click OK to complete the merge.**



8. **When the merge is complete, you'll be directed back to the main Tag Library screen.**

What does merging tags do?

Last Modified on 05/29/2024 5:28 pm EDT

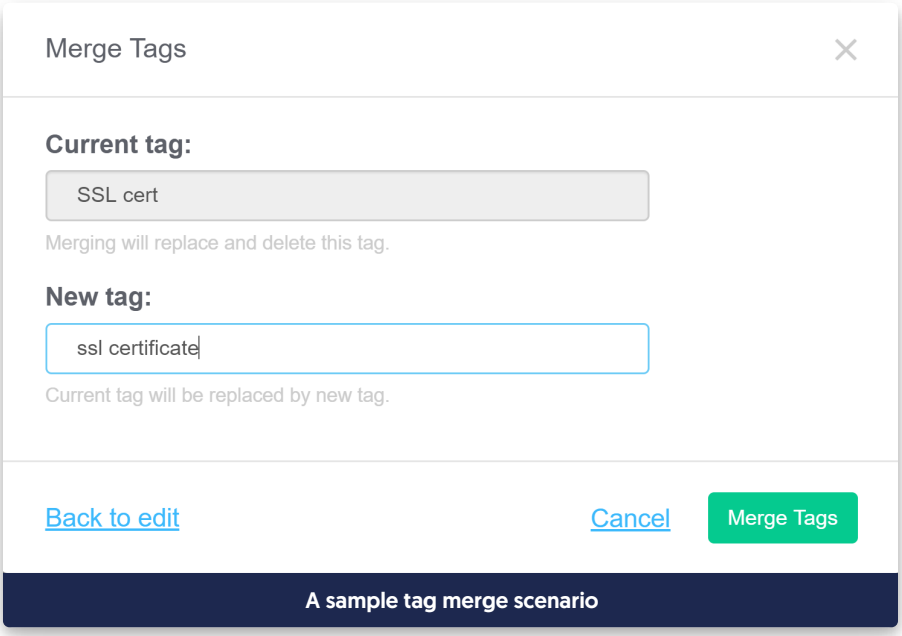
In each tag merge, there are two tags:

- The **current** tag (the tag you began the merge from)
- The **new** tag (the tag that will remain when the merge is complete)

Merging will:

- Add the **new** tag to all articles that have the **current** tag
- Remove the **current** tag from all articles
- Delete the **current** tag from the Tag Library

Let's assume I'm using this scenario in my merge:



A sample tag merge scenario

SSL cert is the tag I began the edit and merge with.

When I complete the merge:

- That `SSL cert` tag won't exist anymore
- All articles that had `SSL cert` as a tag will have the `ssl certificate` tag
- Articles that had both tags will just get the `SSL cert` tag removed
- Any Manage filters that used `SSL cert` tag as a filter will have the tag removed--you'll need to manually update them to add the `ssl certificate` tag

Tags usage report

Last Modified on 05/29/2024 5:28 pm EDT

In the Tags Library, you can generate a Tags Usage Report to help you audit your tags.

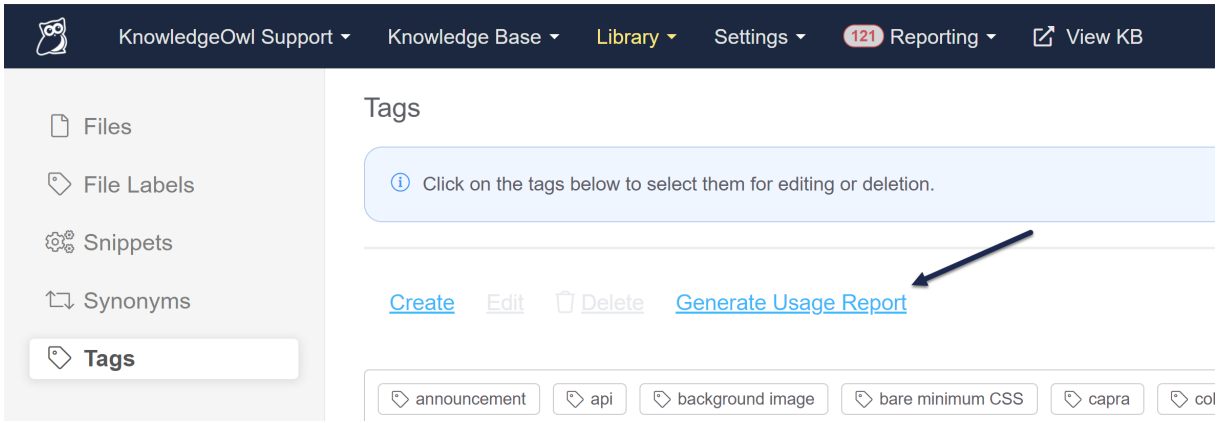
This report comes in CSV format, with three columns:

- **Tag Name**: the text of the tag as it appears in your knowledge base
- **Article Usage**: a count of all the non-deleted articles that use this tag
- **Category Usage**: a count of all the topic display and custom content categories that use this tag

How do I generate a report?

To generate a tags usage report:

1. Go to **Library > Tags**.
2. Select the link to **Generate Usage Report**.



3. You'll see a progress spinner while the usage report is being generated.
4. Once it finishes, the text will change to a link prompting you to **Download Usage Report**.



5. Click that link to download the CSV.

Additional actions will depend on which browser you're using.

How can I use this report?

The tag usage report is great for tag audits. It can help you identify tags:

- That aren't used anywhere (have 0 Article Usage and 0 Category Usage), which are "safe" to **delete**: Sort by the Article Usage column and review
- That are slight variations or duplicates of each other so they can be **merged**: Sort by the Tag Name column and review
- With low usage overall that might be candidates for deletion, merging, or editing: Sort by the Article Usage or Category Usage columns and review
- Identify tags that are misspelled or improperly formatted for editing: Sort by the Tag Name column and review

What does it look like?

Here's a sample of the top of our tag usage report, sorted by the Article Usage column:

	A	B	C	D
1	Tag Name	Article Usage	Category Usage	
2	int: ref-edit-article	63	0	
3	int: low-impact	53	0	
4	int: needs-more-screenshots	37	0	
5	int: ref-settings-basic	30	0	
6	int: needs-use-case	28	0	
7	search	21	3	
8	int: ref-custom-css	24	0	
9	int: ref-html-article	22	0	
10	int: needs-final-sample	22	0	
11	int: needs-updated-screenshots	20	0	
12	int: ref-settings-style	20	0	
13	int: ref-settings-search	19	0	
14	int: ref-edit-snippet	19	0	
15	capra	14	4	
16	int: ref-settings-security	18	0	
17	int: ref-library-files	17	0	
18	int: ref-library-snippets	16	1	
19	int: ref-manage-articles	16	0	
20	int: ref-edit-category	16	0	
21	int: ref-account-readers	16	0	
22	int: ref-settings-widget	15	0	
23	int: ref-glossary	14	0	
24	int: ref-html-body	14	0	
25	int: ref-versions	13	0	
26	subscription	11	2	
27	int: needs-intro	13	0	
28	int: api	12	0	
29	int: ref-articles	12	0	
30	int: ref-account-readers-settings	11	0	
31	int: ref-custom-head	10	0	
32	sso	10	0	
33	int: needs-code-formatting	10	0	
34	int: ref-contact-form-edit	9	0	

What are file labels?

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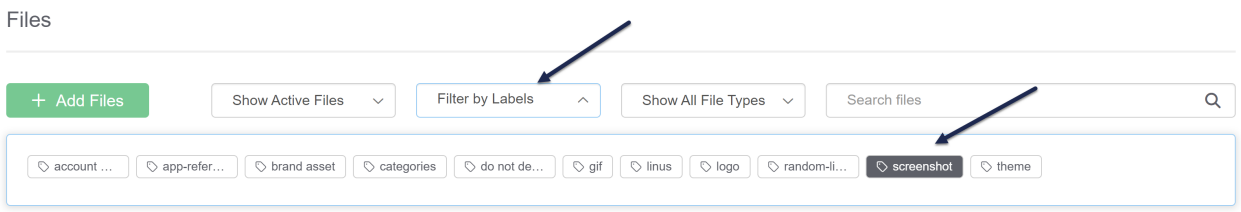
A file label is a word or short phrase that describes or categorizes a file. Files can have as many file labels as you like. They can be a great way to add organization to your file library.

The easiest way to think about file labels is to consider them like filters for your files. These filters can be used in the File Library to make it easier to find files you need quickly.



Common uses for file labels include:

- The relevant feature, functionality, geographic region, policy, procedure, etc. for a given file (e.g. we have file labels for "icons" for the various icons we use in our knowledge base and for some of our prominent features)
- The file's owner (we've seen this used for individuals, teams, departments, etc.)
- Other information relevant for file audits (we've seen people label files for the fiscal year they're relevant to, etc.)

File labels are only displayed in the File Library and in the File Label Library. They're only viewable by people with app.knowledgeowl.com access to one of these two locations.

Create a file label

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You can create file labels in two ways:

- In **Library > File Labels** using the **Create** link.
- In the File Library, while editing an individual file, type new File Labels into the field there and hit Enter or tab

Our default **Editor** and **Writer** roles have permission to create file labels. If you're using a custom author role, that role must have the File Library Permission to **Create file labels** to create file labels.

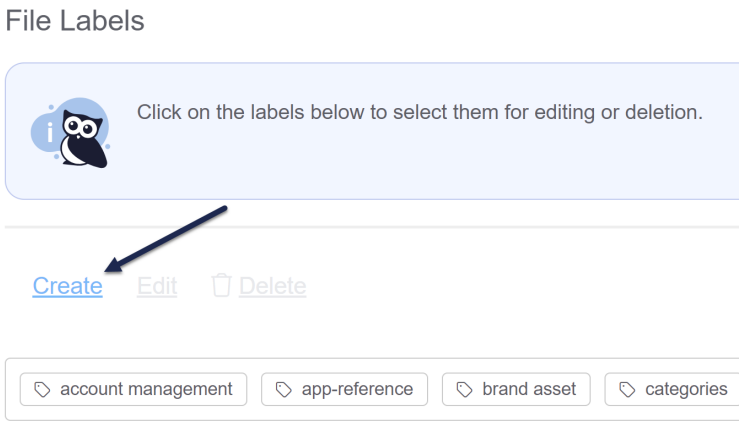
Create file labels in File Label Library

Creating labels in the File Label Library can be great if you:

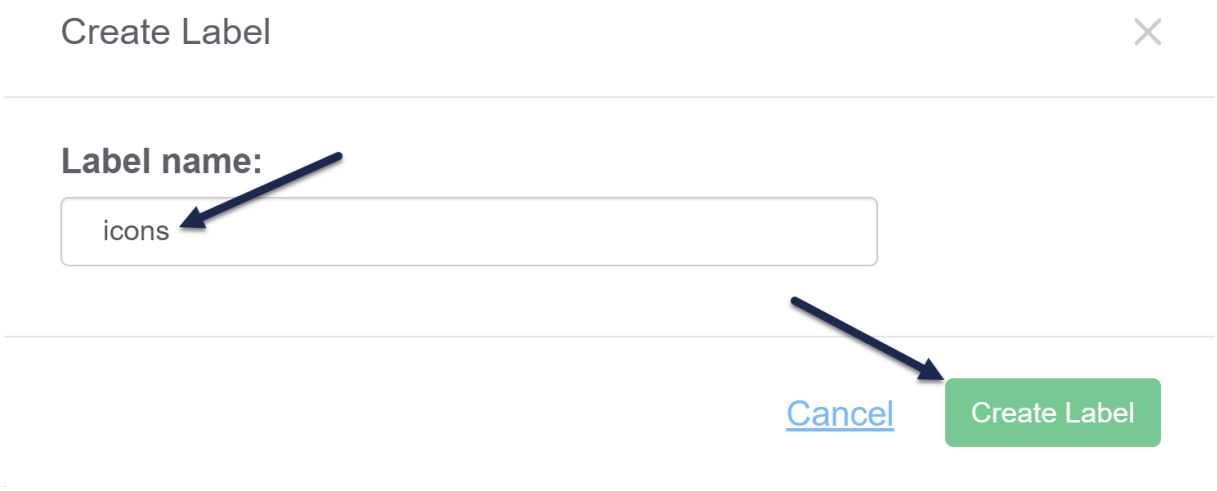
- Need to create a lot of file labels at once
- Want to be able to see file labels that already exist while you create file labels

To do so:

1. Go to **Library > File Labels.**
2. Click the **Create** link near the upper left of the screen.



3. This will open the Create file label pop-up. Add the **Name** you'd like displayed for the file label. Here, I've created an "icons" file label:



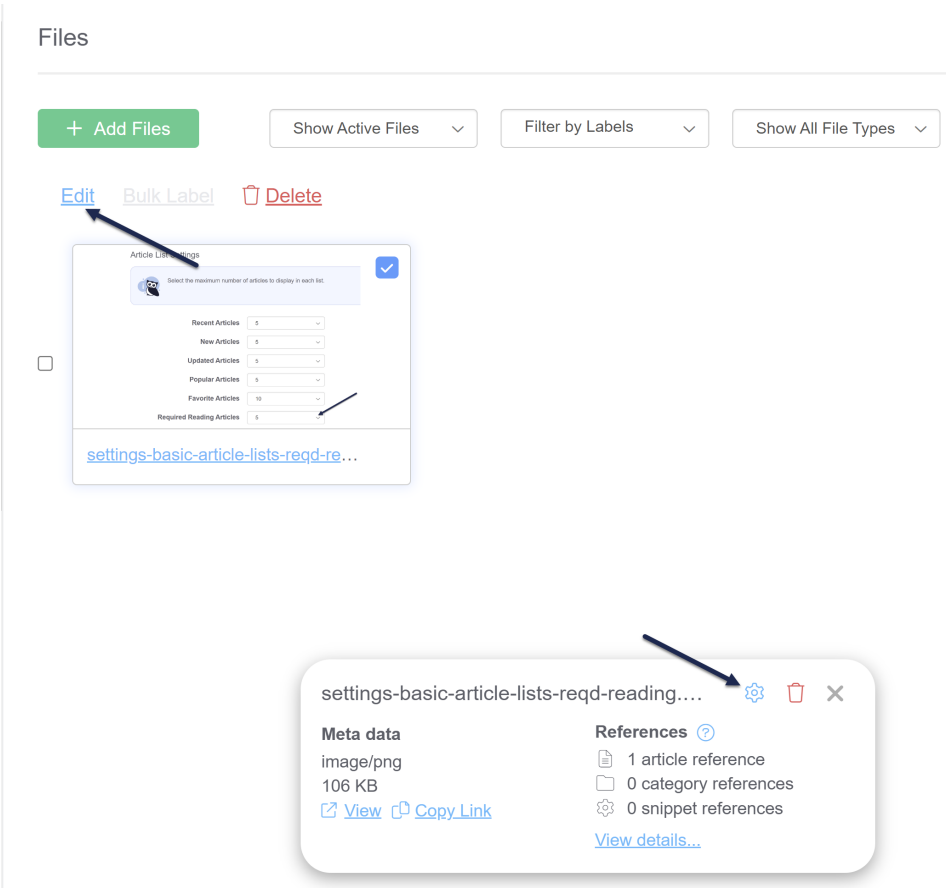
4. Once you've finished editing the file label, click the **Create Label** button. The file label will be added to your library and immediately available for use.

Create file labels in File Library

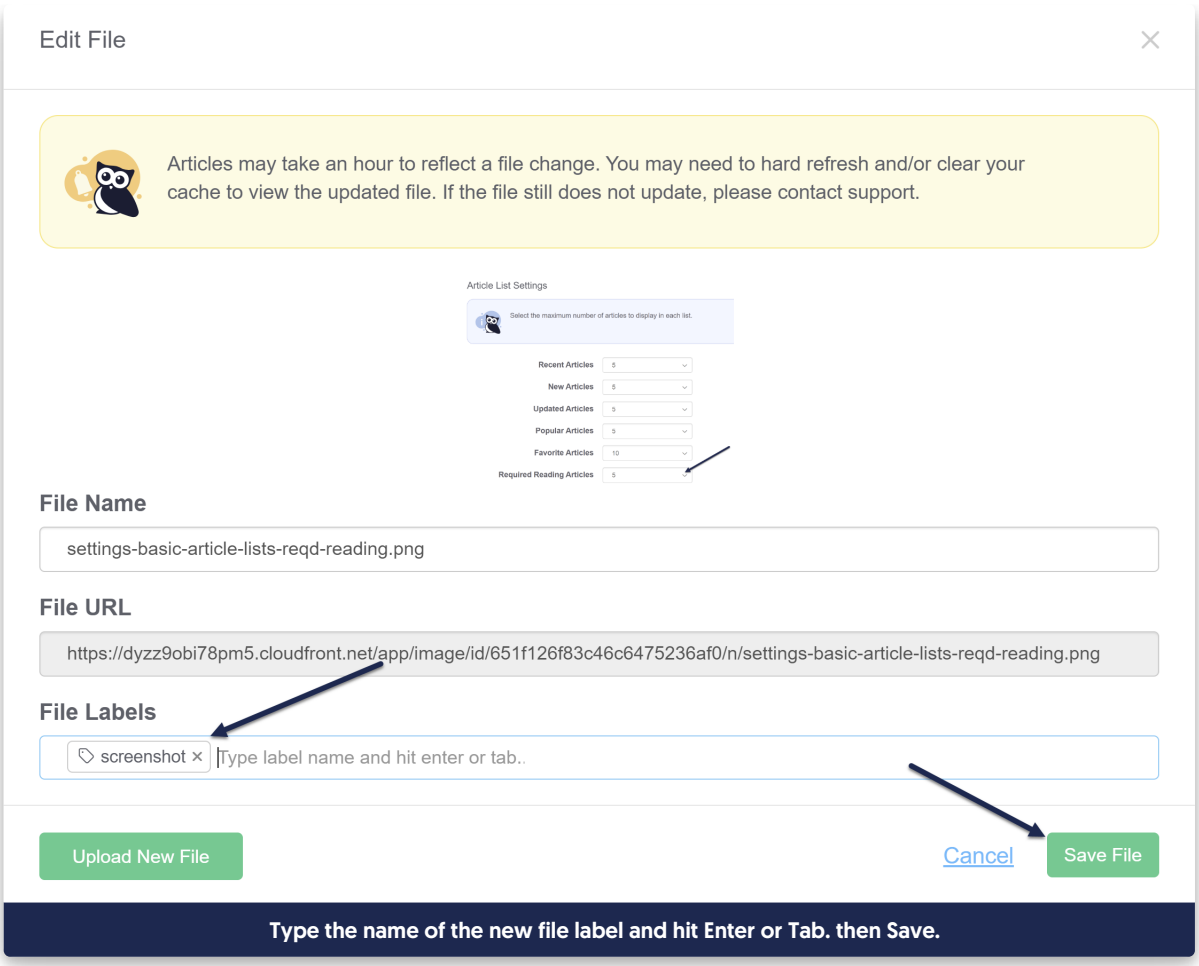
You can also create labels on the fly while you're editing an individual file in the File Library.

To do so:

1. Go to **Library > Files**.
2. Click on the file you'd like to edit.
3. Click the Edit link that appears near the top just below the Add Files button OR the gear cog icon in the metadata pop-up at the bottom of the page:



4. **In the Edit File pop-up, type the name of the label you'd like to add in File Labels. Hit Enter or Tab once you're done typing the name.**



5. **The file label will be created in the File Label Library and added to this file.**
6. **Be sure to Save your file once you're done.**

Edit a file label

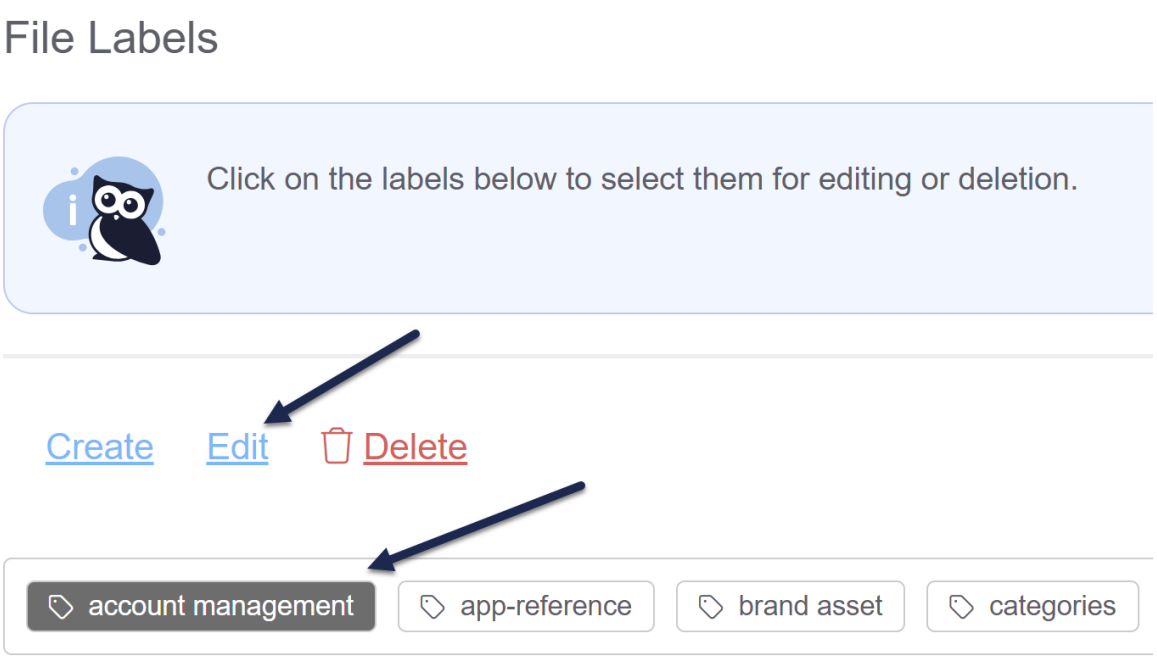
Last Modified on 05/29/2024 5:28 pm EDT

Once a file label has been created, you can edit it to update the name.

Our default **Editor** and **Writer** roles have permission to edit file labels. If you're using a custom author role, that role must have the File Library Permission to **Edit file labels** to edit labels.

To do so:

1. Go to **Library > File Labels.**
2. Click on the file label you'd like to edit. (If you have a lot of labels, you may need to search to find the label you want.)
3. Once you've clicked on a file label, the **Edit** link will activate. Click that link.



4. This will open the Edit Label pop-up, where you can edit the name of the file label.
5. Once you've finished making the changes to your label, click the **Edit Label** button in the lower right to save your changes.



6. **All files with this label will now display the updated name.**

Delete a file label

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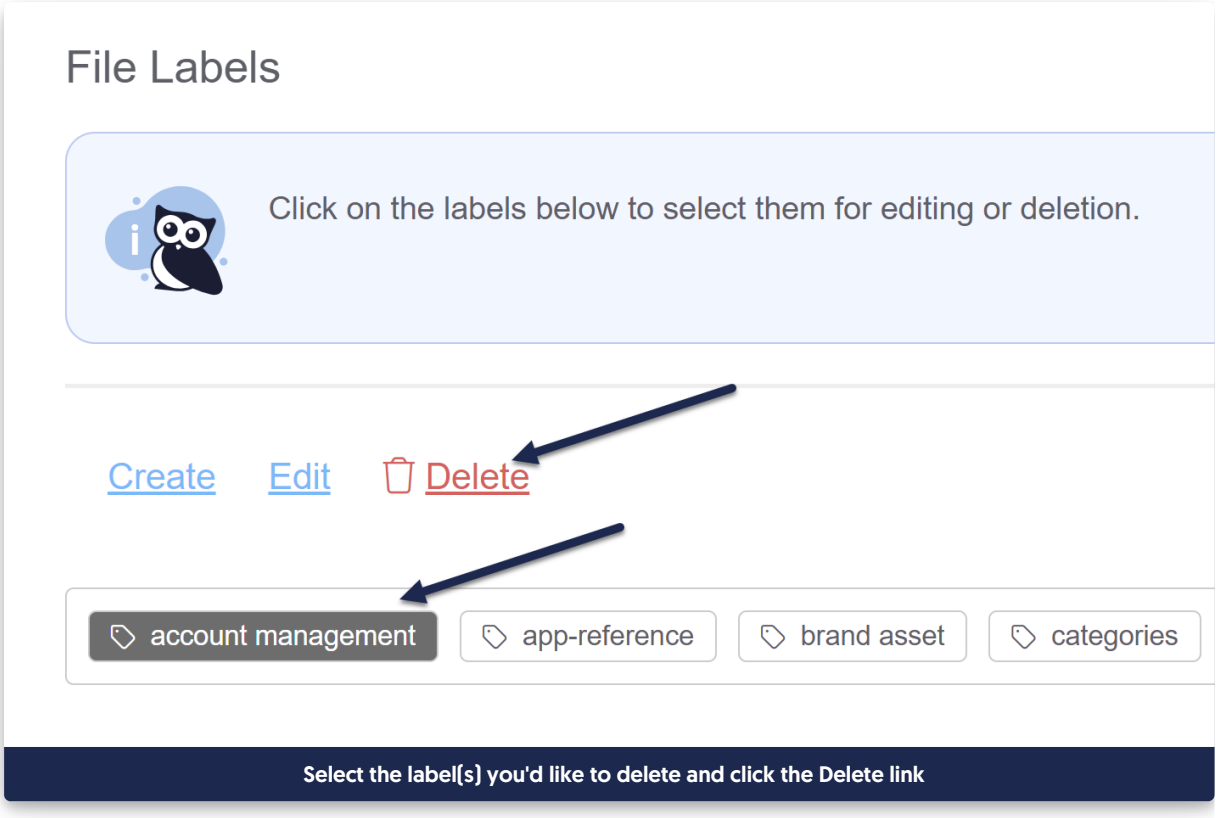
Once a file label has been created, you can delete it from the File Label Library. This will remove the file label from all files where it's been used.

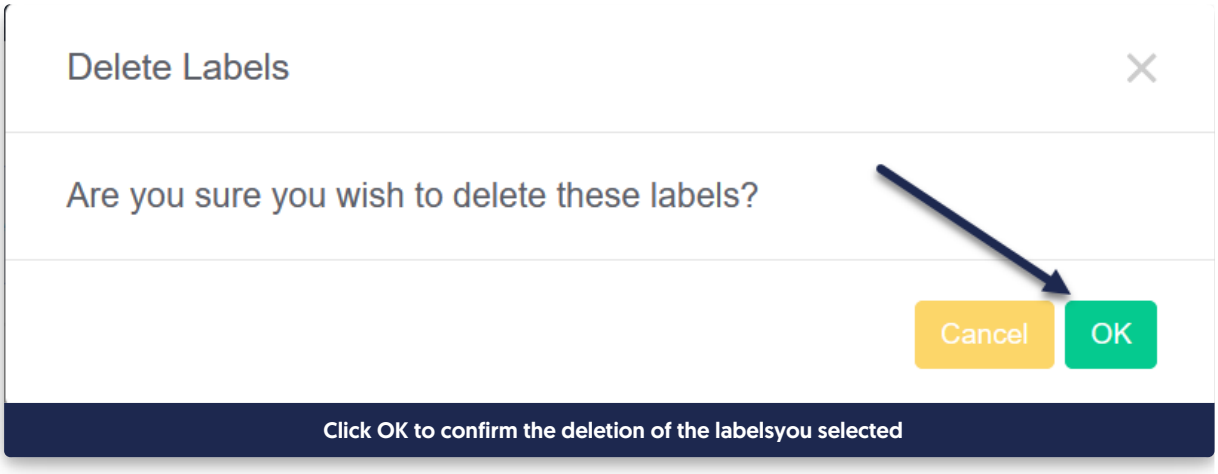
Our default **Editor** and **Writer** roles have permission to delete file labels. If you're using a custom author role, that role must have the File Library Permission to **Delete file labels**.

To do so:

1. Go to **Library > File Labels**.
2. Click on the file label or labels you'd like to delete. (If you have a lot of labels, you may need to search to find the labels you want.)
3. Once you've clicked on one or more labels, the **Delete** link will activate. Click that link.



4. This will open a confirmation pop-up to be sure you want to delete these labels. Click **OK** to delete them.



5. **All the labelsyou selected will be deleted and removed from any files that referenced them.**

Add an existing label to a file

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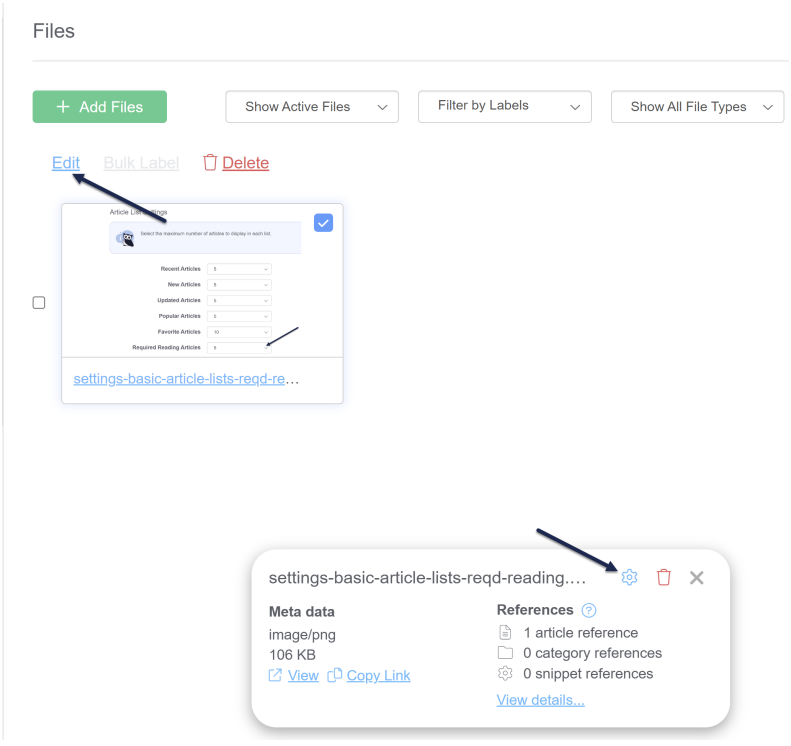
Creating a new label is not always the same thing as adding an existing label to a file.

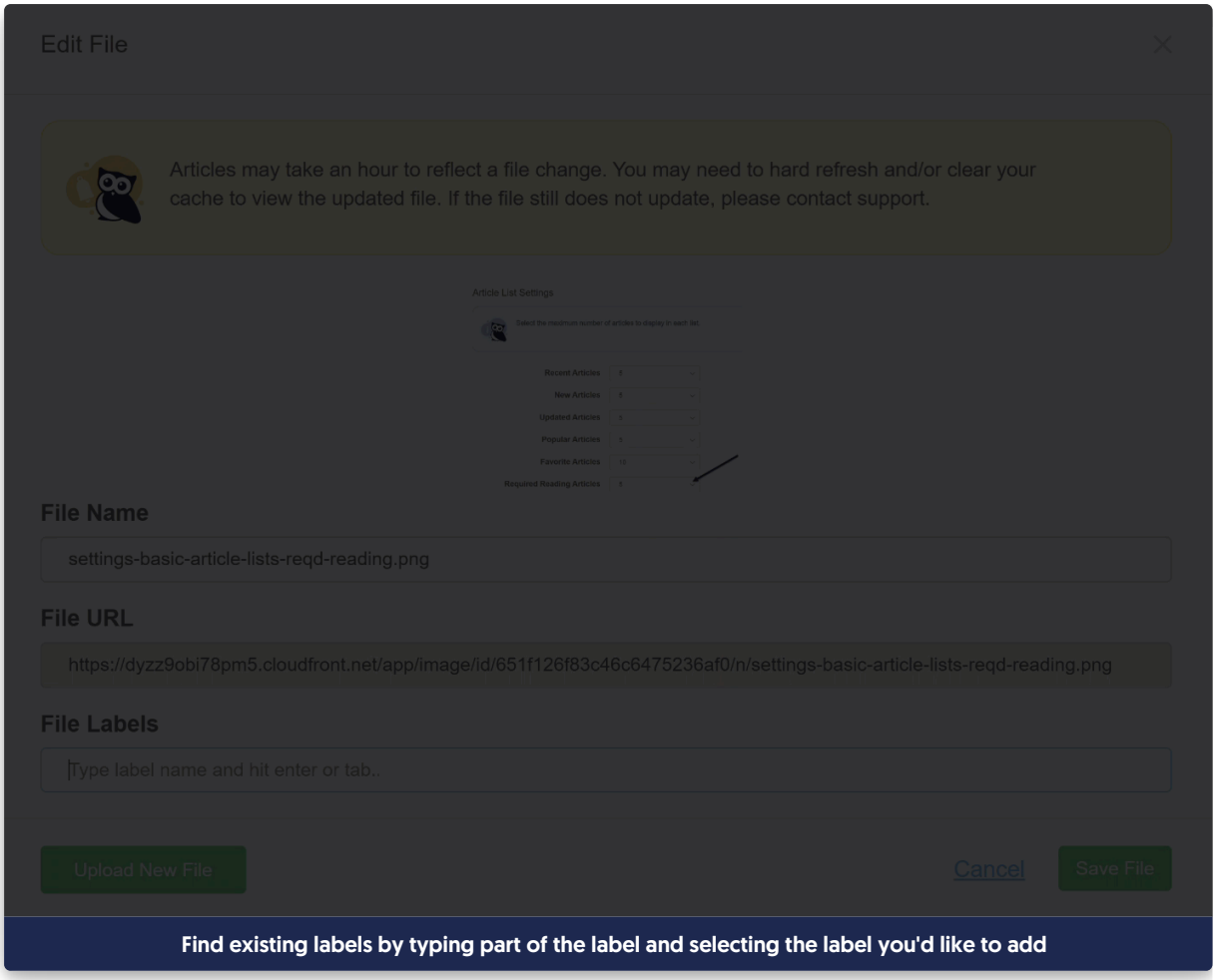
Our default **Editor** and **Writer** roles have permission to add existing labels to articles and to create new labels. If you're using a custom author role, that role must have the File Library Permission to **Edit files** but might not have the ability to **Add new labels**. (If you have both permissions, you can start typing and then create a new label or select an existing; if you only have the ability to edit files, you can only start typing and select from existing labels.)

To add an existing label to a file:

1. Go to **Library > Files**.
2. Click on the file you'd like to add the label to.
3. Click the **Edit** link that appears near the top just below the **+ Add Files** button, or click the gear cog icon in the metadata pop-up at the bottom of the page:



4. In the **Edit File** pop-up, start typing the name of the label. As you type, you'll get a list of autosuggested matching labels. You can use the arrow keys + Enter or click with your mouse to select the label you'd like to add.



Find existing labels by typing part of the label and selecting the label you'd like to add

5. Once you've finished adding labels, be sure to **Save** the file.

Remove a label from a file

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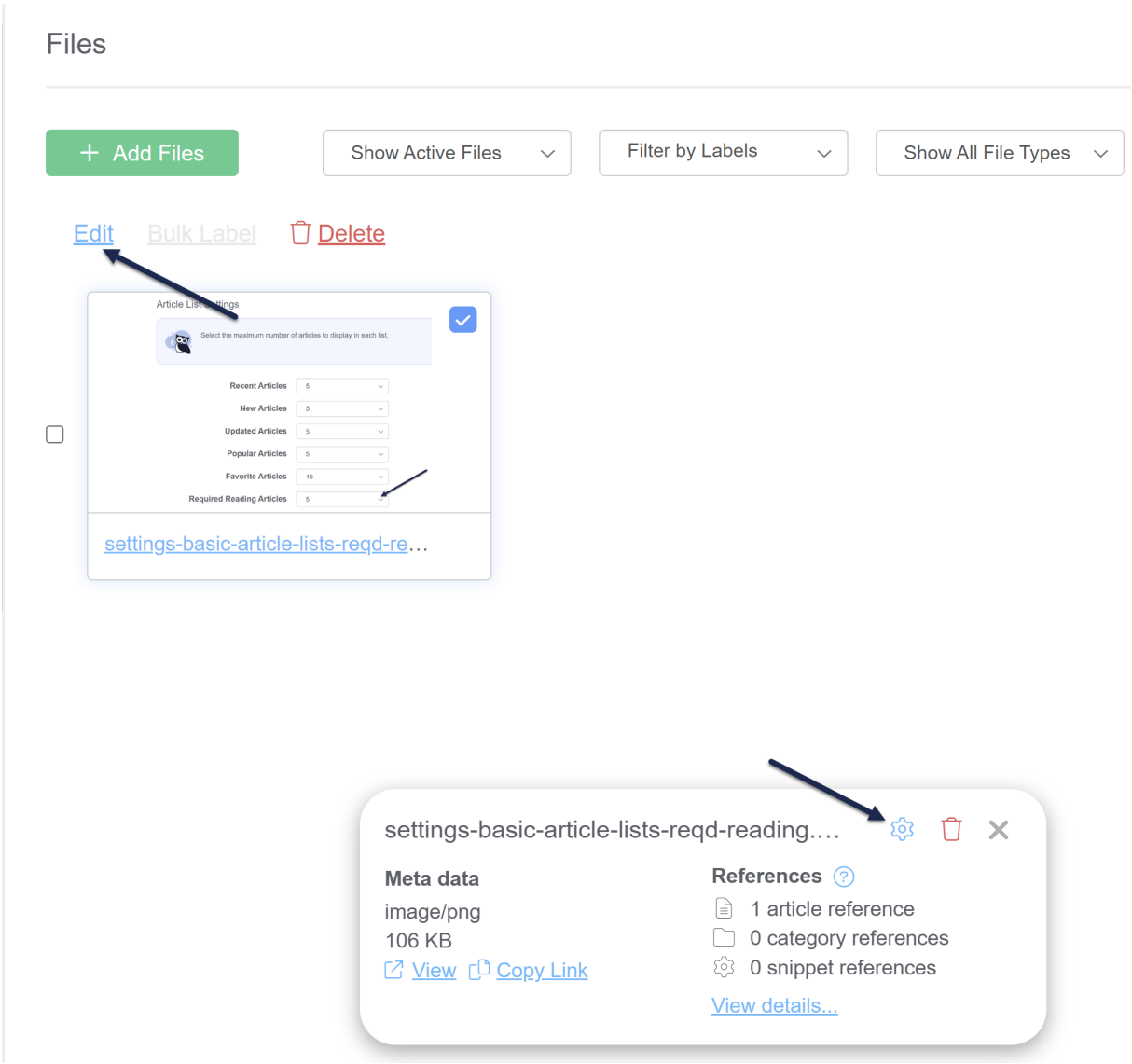
Removing a label from a file simply removes it from the file--it doesn't delete the label from your knowledge base. If you'd like to delete a label from your knowledge base completely, see Delete a label.

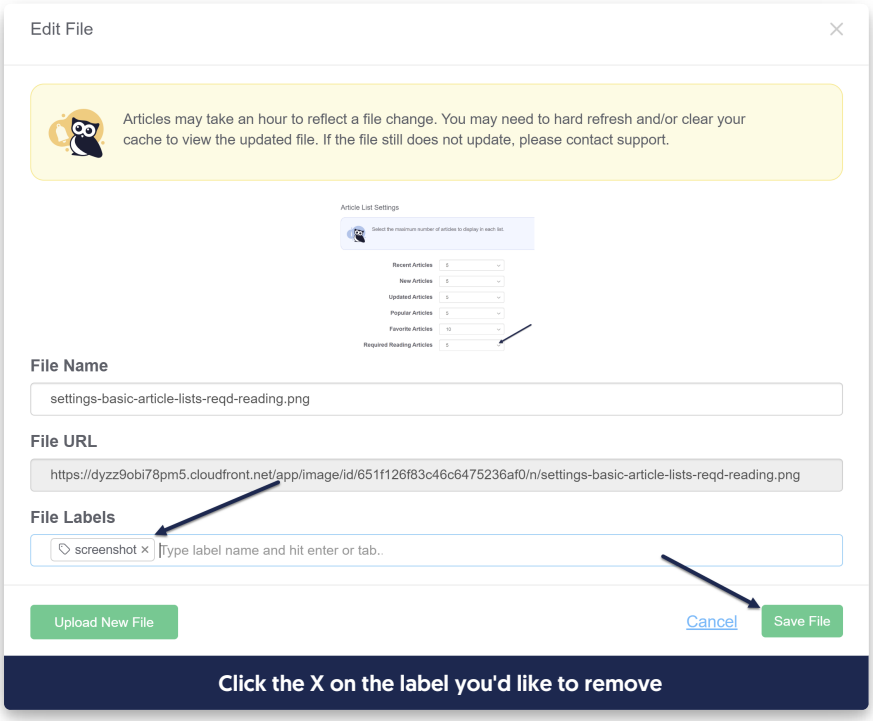
Our default **Editor** and **Writer** roles have permission to remove labels from files. If you're using a custom author role, that role must have the File Library Permission to **Edit files** to remove a label from a file.

To remove a label from a file:

1. Go to **Library** > **Files**.
2. Click on the file whose label you'd like to edit.
3. Click the **Edit** link near the top just below the **+ Add Files** button or the gear cog icon in the metadata pop-up at the bottom of the page:



4. **Click the x next to the label you'd like to remove.**



5. Be sure to **Save** the file.

Merge labels

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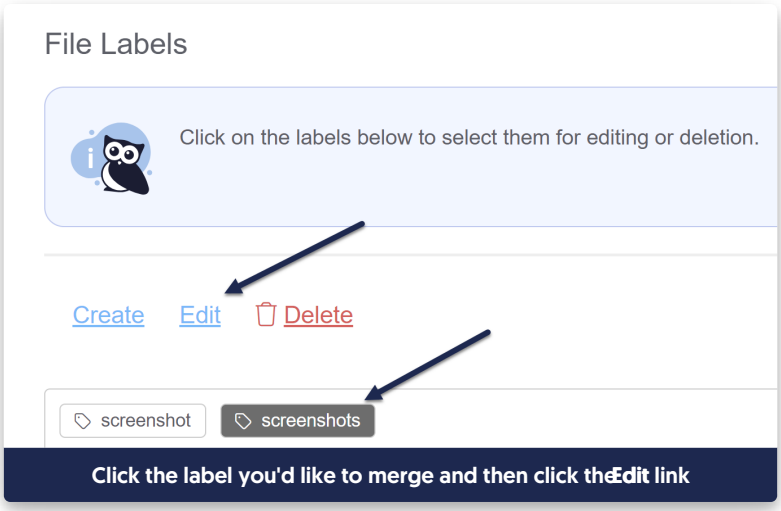
Like your product, company, and policies, file labels might change over time. And without clear style guidelines (and even sometimes with them!), different authors might create differently-structured labels. Linus has faced this problem several times in our documentation, for example, some files were labeled with `screenshot` and some were labeled with `screenshots`. What's an owl to do?

Users with our default **Editor** or **Writer** roles, or those with custom roles who have permission to both edit and delete file labels have the option to merge two labels together.

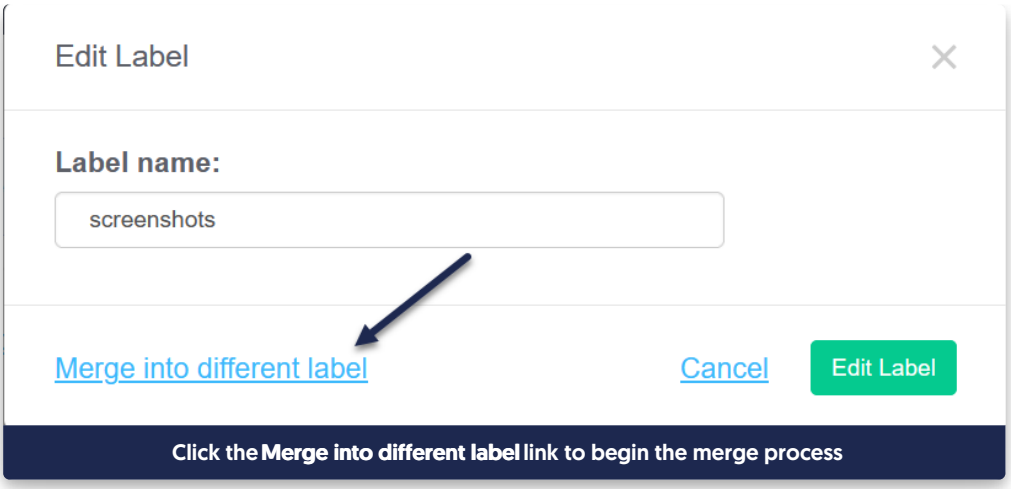
Merging allows you to replace one label with the other and delete the now unneeded label. It's fast and much easier than auditing files through a File Library label filter.

To merge labels:

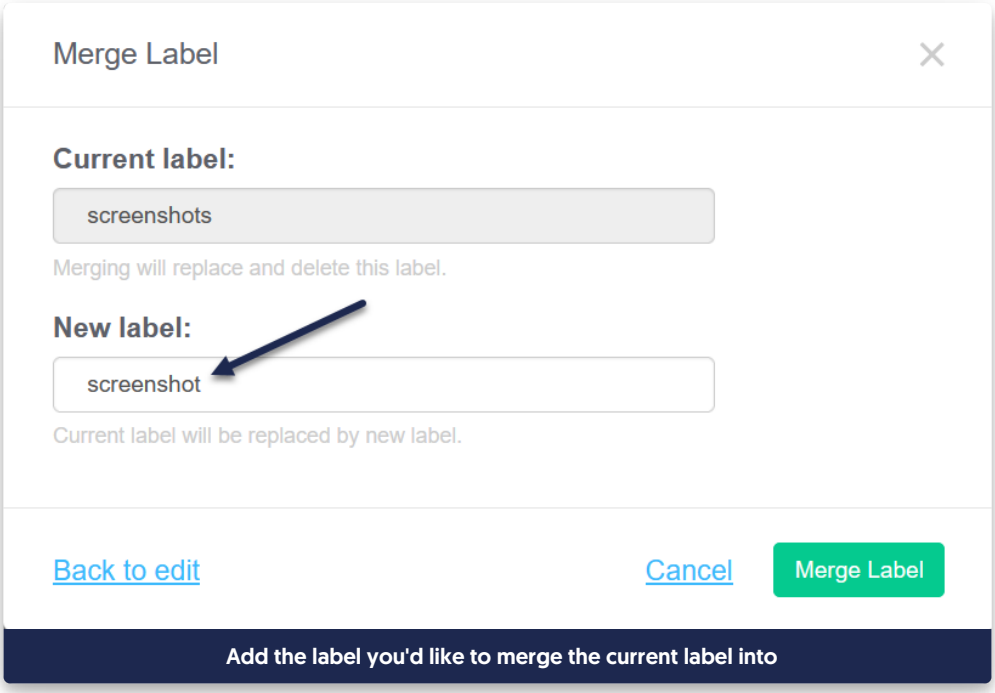
1. Go to **Library > File Labels**.
2. Click on the label you'd like to merge into another label. This will be the label that gets removed. Here, we'll use screenshots and merge it into screenshot.
3. With the label selected, the **Edit** and **Delete** links will become activated. Click on the **Edit** link.



4. This will open the Edit Label pop-up. If you have the proper permissions to merge labels, you'll see a **Merge into different label** option in the lower left. Click on this link.



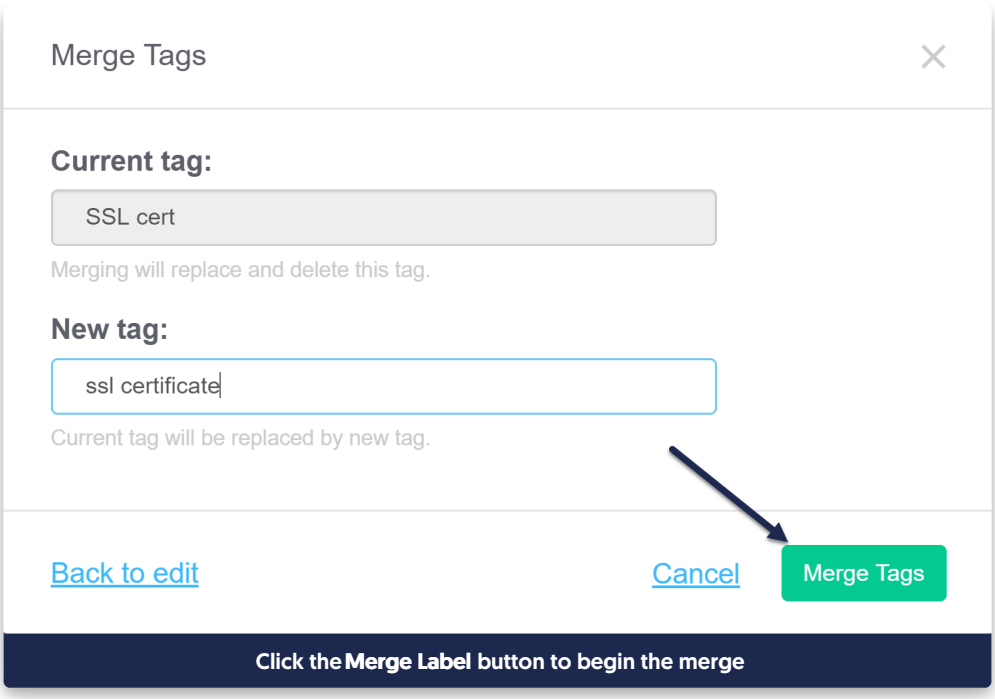
5. On the next screen, you'll be able to search for the "new" label you'd like to merge this label into. Start typing the name of the **New label** you'd like to merge this label into and select the correct name. Here, I'm using our screenshot label as the new label.



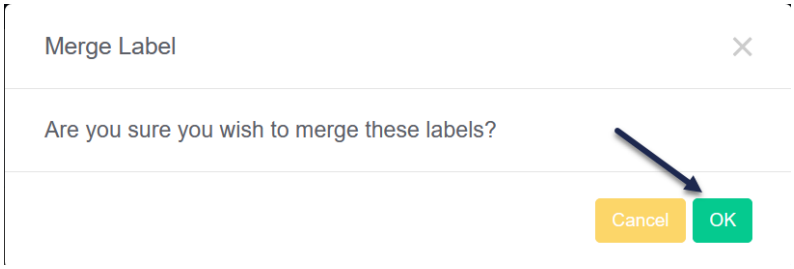
During the merge:

- **The "new label" will be added to all of the current label's files. For example, all files with "screenshots" will get the "screenshot" label added as part of the merge. It will also remain in your File Label Library moving forward.**
- **The "current" label will be deleted from your File Label Library and all files when the merge is complete. The label will drop out of your File Library "Filter by Labels" options.**

6. **Once you've added the "New label" you'd like to keep, click the Merge Label button to begin the merge.**



7. **You'll see a confirmation message to be sure you want to merge these labels. Label merges cannot be undone. Click OK to complete the merge.**



8. **When the merge is complete, you'll be directed back to the main File Label Library screen.**

What does merging labels do?

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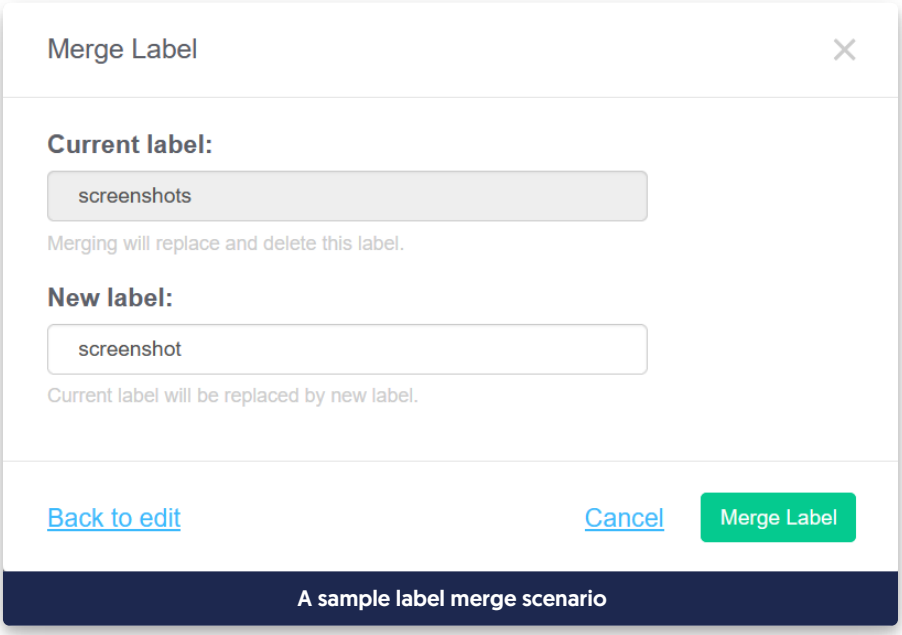
In each label merge, there are two labels:

- The **current** label (the label you began the merge from)
- The **new** label (the label that will remain when the merge is complete)

Merging will:

- Add the **new** label to all files that have the **current** label
- Remove the **current** label from all files
- Delete the **current** label from the File Label Library

Let's assume I'm using this scenario in my merge:



A sample label merge scenario

"screenshots" is the label I began the edit and merge with.

When I complete the merge:

- That `screenshots` label won't exist anymore
- All articles that had `screenshots` as a label will have the `screenshot` label
- Articles that had both labels will just get the `screenshots` label removed
- `screenshots` will no longer appear in the File Library "Filter by label" dropdown, but `screenshot` will

Use file labels as File Library filters

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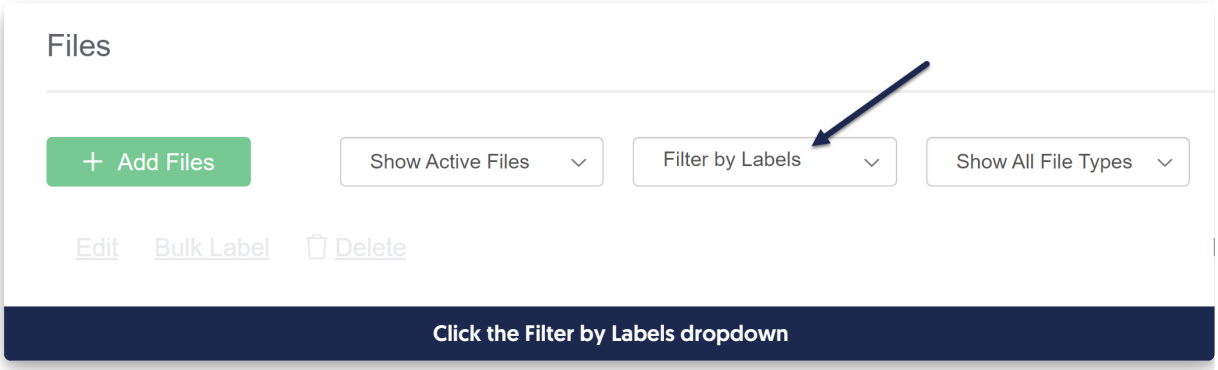
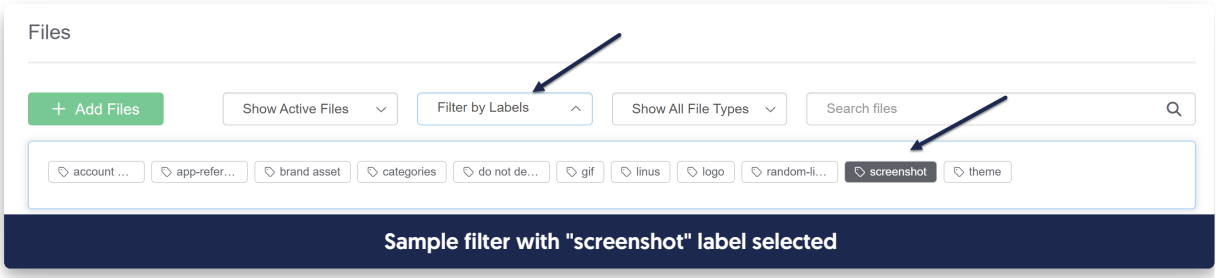
Once you have added file labels to your files, those file labels can be used to filter your File Library. To do so:

1. Go to **Library > Files.**
2. Click the **Filter by Labels** dropdown.



Click the Filter by Labels dropdown

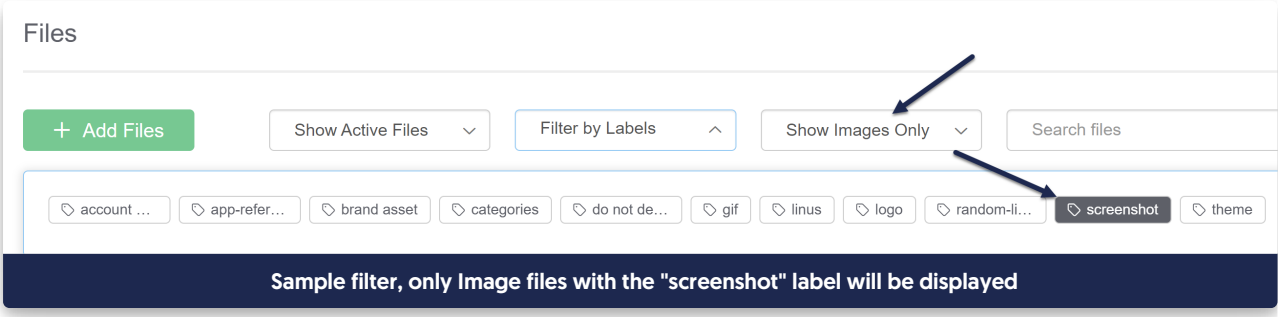
3. Select the label(s) you'd like to use as filters. If you select more than one label, only files with all the selected labels will be displayed.
4. Once you select a label, the File Library display will update to show only the files with that label. Here, I've selected "screenshot":



Sample filter with "screenshot" label selected

5. To remove a label from your filter, click on it again to deselect it. (Or reload the page.)

You can combine the labels filter with the file type filter and search, too.



Sample filter, only Image files with the "screenshot" label will be displayed

What is a snippet?

Last Modified on 07/10/2024 5:26 pm EDT

Snippets are chunks of reusable content that can be placed within articles, categories, and even your theme's HTML. The content of the snippet can be as simple as a single word or sentence, or as complex as a JavaScript function that performs an action on whatever page it is used.

For example, you could create a snippet that contains your company's copyright information. Wherever you want the copyright to appear, instead of typing it out again and again, you would use the snippet's merge code in its place.

When the page displays, the snippet merge code is replaced with the snippet's content. When you need to update your copyright information, you can edit and update the snippet content, and the changes will be automatically reflected wherever the snippet was used.

Text within snippets is **not indexed** for search.



Pro tip
If you have a chunk of content that you'd like to reuse but that also makes sense as a stand-alone article, consider using topic articles instead!

Create a snippet

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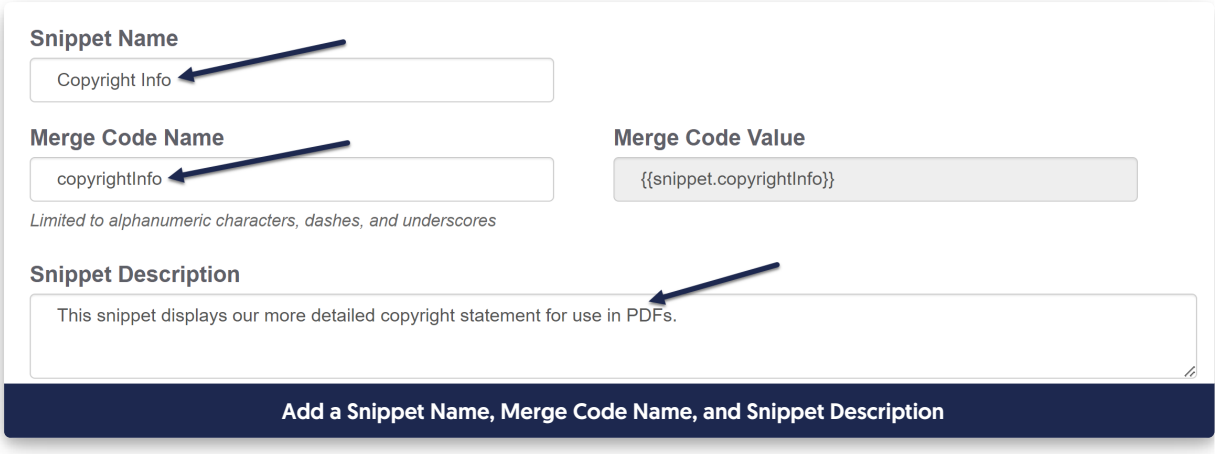
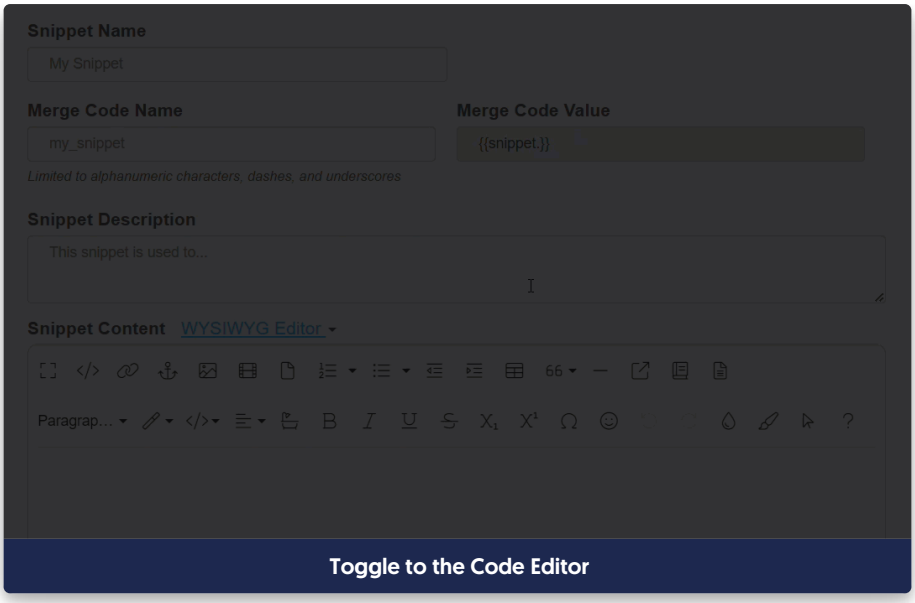
You can choose to create a snippet from scratch or to copy an existing snippet to use as a starting point.

To create a snippet from scratch:

1. Go to **Library > Snippets**.
2. Select the **+ Create New Snippet** button.
3. Give your snippet a **Name**. This is how the name will appear in the Snippet Library and in snippet look-ups. The Merge Code Name will auto-generate from the Snippet Name, but you can edit it if you'd like to.
4. Give your snippet a **Description**. This will help describe what your snippet does to other authors (and may help remind you if you forget!) Here, we've added a name and description for a copyright statement.



5. If your snippet is used to display text (as our copyright is), type and format the text you want to display directly in the WYSIWYG.
6. For code-based snippets containing scripts or style tags, select the dropdown next to **Snippet Content** to select the **Code Editor**, and add your code there.



7. Once you've finished formatting your snippet, select the **Create** button in the upper right to finalize creation and save your snippet.

Your snippet will now display in the Snippet Library, as well as in the look-up field when someone tries to Insert Snippet into an article.

Copy existing snippet

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In order to copy an existing snippet to use as a starting point, go to **Library > Snippets** to view a list of your current snippets. In the top right of each of the snippet panels there is a little gear icon. Click on that and you will see the option to copy which will pop up a confirmation.



Snippets need to have unique unique merge code names, so we will automatically add "Copy" to the new snippet, but you can edit the name and merge code to whatever makes sense to you.

Add snippets in content

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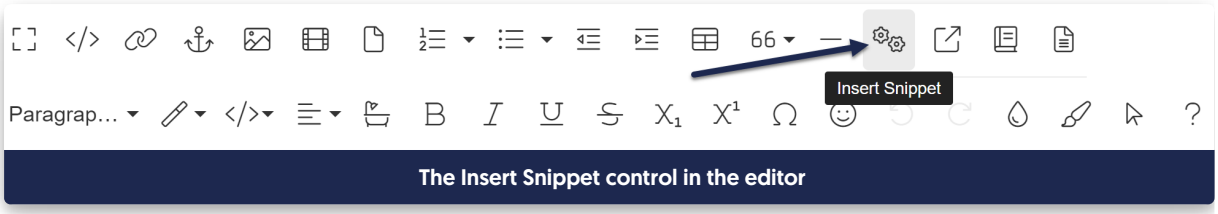
You can add snippets to:

- Individual articles
- Categories
- Custom HTML (adding snippets to Custom HTML > Body is great for adding footer content; you can add snippets to Custom HTML > Article to add them to all articles)

To add a snippet, you will need to add its Merge Code Value--this is a value in double curly brackets, with snippet.MergeCodeName after it.

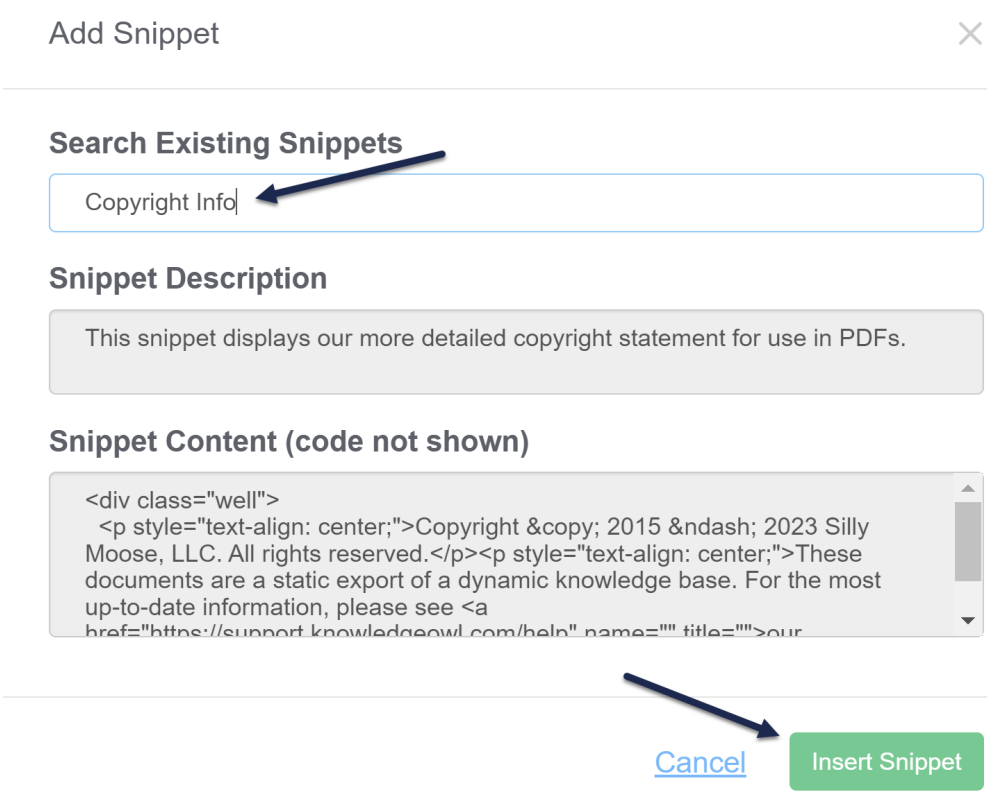
For individual articles:

1. Select the Insert Snippet control (two gear cogs icon) to add a snippet:

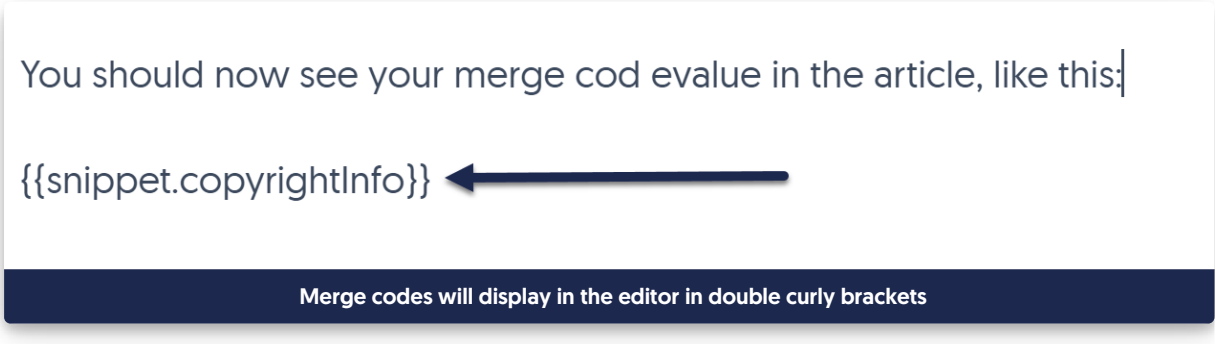


The Insert Snippet control in the editor

2. This will open a pop-up where you can search for your snippet.
3. Type a part of the snippet's name; the window will suggest snippets as you type.
4. Click on the suggestion that matches it. This will display the Description and Snippet body so you can be sure you've selected the correct snippet.
5. Once you're sure you've selected the correct snippet, select **Insert Snippet**.



6. **You should now see your merge code value in the article, like this:**



7. **Once you Save your changes, anyone viewing the knowledge base will see the body of the snippet (if it's text) or will see the results of the code in it. For example:**

Copyright © 2015 – 2024 Silly Moose, LLC. All rights reserved.
These documents are a static export of a dynamic knowledge base. For the most up-to-date information, please see our knowledge base.

Undo changes to a snippet

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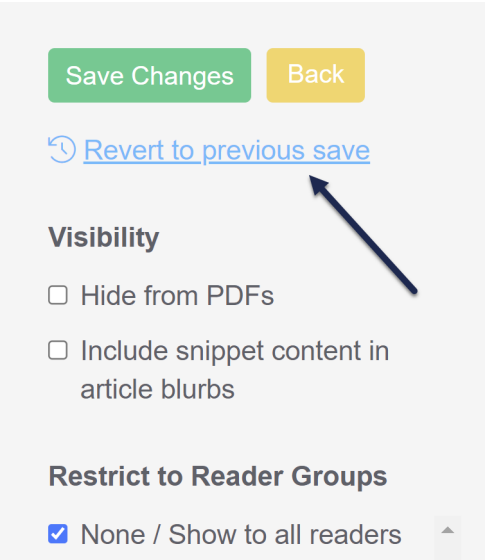
Snippets don't save a full revision history like articles do, but you do have the option to **Revert to previous save**. This feature tracks the last three saves of the snippet so you can roll back changes to one of those previous saves. (It works similarly to our Undo changes to Settings > Style feature.)

Reverting to a previous save will roll back any changes to:

- Snippet Name
- Merge Code Name (and, by extension, the Merge Code Value)
- Snippet Description
- Snippet Content (whether in Code Editor or WYSIWYG Editor)
- **Visibility** settings (Hide from PDFs and Include snippet content in article blurbs)
- Any **Restrict to Reader Groups** selections

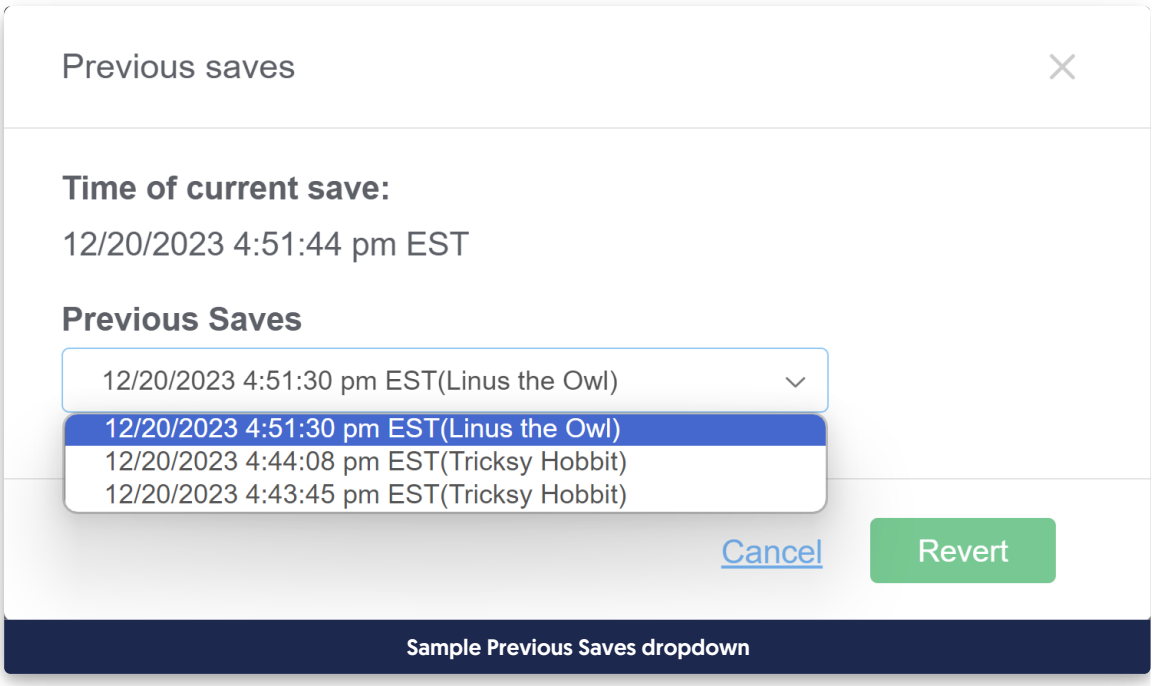
To revert to a previous save, you must have an Editor or Writer role, or a custom author role with the **Edit snippet** permission:

1. Go to **Library > Snippets**.
2. Open the snippet you'd like to recover changes on for editing.
3. Click the link to **Revert previous save** in the upper right corner below the Save Changes and Back buttons to begin the process:



   a. If you don't see this link in the upper right, it means we don't have a record of any previous saves to revert to. This can happen if:
      i. The snippet was created before 30 December 2023 and has been saved 0-1 times since then.
      ii. The snippet was created after 30 December 2023 and has only been saved once after creation.

4. Once you click the link to Revert previous save, a pop-up will open with the most recent save information and a dropdown of available **Previous Saves** you can restore to.
    - KnowledgeOwl will store up to three recent saves for each snippet. These saves will be identified by the date/timestamp of the save, with the author who saved the changes in parentheses:



Sample Previous Saves dropdown

5. Select the save you'd like to go back to from the **Previous Saves** dropdown.
6. Once you've made your selection, click **Revert**.
7. All of the snippet's details will be updated to the reverted save. You must **Save** the snippet for these changes to go live.

Snippet Library

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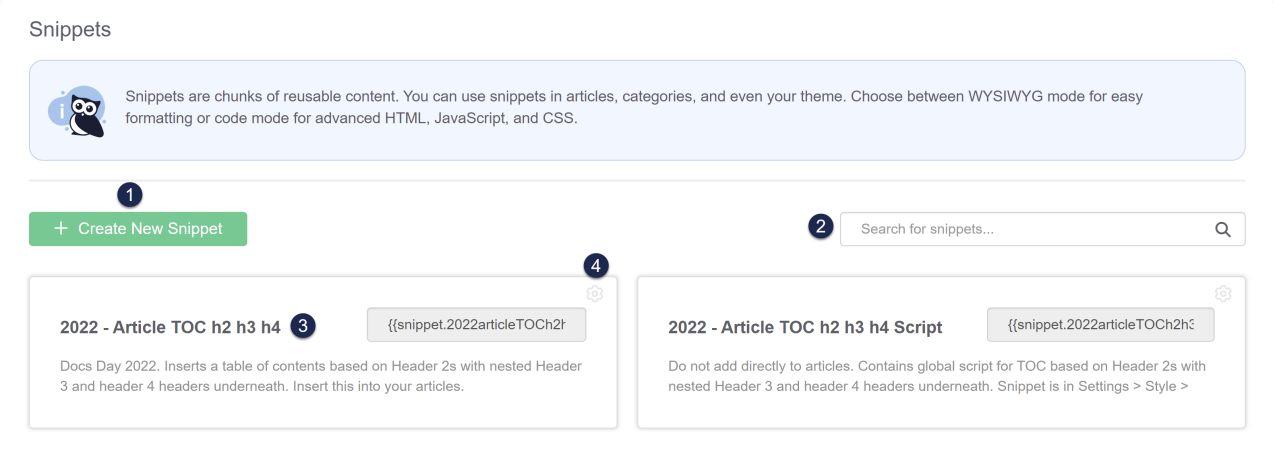
All created snippets are stored in the Snippet Library. To access this library, go to Library > Snippets.



Sample snippet library layout

Within the Snippet Library, you can:

1. Create new snippets.
2. **Search** for existing snippets using words in the snippet title and description.
3. Select any snippet to open it in edit mode.
4. Copy or delete a snippet by clicking the gear cog icon in the upper right corner.

Note: The Snippet Library is sorted alphabetically *and is case sensitive*. This means that all snippets beginning with upper case letters will appear first, in alphabetical order, followed by all snippets beginning with lower case letters, also in alphabetical order.

Snippet use cases

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There are a number of great use cases for snippets:

- Footers or other statements that need to be used a lot of places, such as confidentiality statements
- Brand names or terms that may change frequently: make a snippet for that term, only reference the snippet instead of the full term in all your documentation. When the term needs updating, update only the snippet and all your documentation is updated!
- Specialized sections for articles, such as Article Table of Contents
- Code to handle unusual formatting, or to provide a set of styles for individual articles that differs from your general knowledge base styles
- Adding third-party scripts, embeds, or functionality

See Snippet best practices for more details on how to handle some of these use cases gracefully!

Snippet best practices

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Snippets can be incredibly powerful. Here are some general best practices for making good use of them.

The most common use cases for snippets are:

- Code or CSS
- In-line text
- Reusable content

Below, we've captured some general guidance and best practices for each use case, as well as some examples to help guide you in your snippet journey. Contact us if you have questions about anything not detailed below!

Code or CSS

One of the best use cases for snippets is to add HTML, code, CSS, or any combination of those.

Why you might want to do this:

- The snippet editor will support complex HTML that the article editor strips out on-save.
- You control where snippets are added, so it's a great way to add functionality or styling to a very specific, manually-selected subset of your documentation.
- Snippet references are tracked, so you can see at a glance where this code or CSS has been used, which makes auditing much faster.

For straight HTML, you can use the **Code Editor** for total control, or use the WYSIWYG editor to construct the HTML you need.

Best practices for adding code or CSS to snippets:

1. In the **Snippet Content** section, be sure that **Code Editor** is selected, not WYSIWYG editor.
2. Don't ever toggle back to the WYSIWYG Editor view, as that toggle applies the same extra-vigilant HTML parsing that the article editor does.
3. To add scripts, be sure you include opening and closing `<script>` tags.
4. To add code from other systems for embeds, etc., copy whatever code they give you exactly and paste it in. You don't need to add `<script>` tags if they aren't already in the embed.
5. To add CSS styles, be sure you include opening and closing `<style>` tags.

Here are some examples of those best practices at work:

Script and style

Some snippets can contain both scripts that do things and a style section to do CSS, like this one:

```
<script
src="//dyzz9obi78pm5.cloudfront.net/
t-5">
</script>

<style>
  /* Style the search box */
  #glossary-search {
    height: 28px;
    font-size: 14px;
    float: right;
    width: 300px;
    padding: 2px;
  }

  /* Highlight color for search term matches */
  .highlight {
    background-color: yellow;
  }
</style>
```

HTML and script

We have a snippet to create a Subscribe button for our custom content categories. This includes HTML to add the button merge code in a paragraph, as well as a script to insert the button where we want it:

Snippet Content Code Editor

```
<p>[template("cat-subscribe")]</p>
<script>
    $(function() {
        $(".ko-cat-sub-cntr").insertBefore($(".hg-article-header h1"));
    });
</script>
```

Third-party script and style

Some third-party tools will provide specially-formatted HTML to add functionality. The regular article editor will generally strip these out because they aren't part of the HTML spec. Using a snippet for that special script is great--and you can still tuck a style section in for some extra styling of that element or others. For example, we embed our Zapier integration in our documentation. Zapier provided us with a pre-built script for this, but we also use some CSS to hide the article title. So we use Zapier's code and also include a style section to add our custom CSS:

Snippet Content Code Editor

```
<zapier-full-experience
  client-id=
  theme="light"
  app-search-bar-display="show"
></zapier-full-experience>

<style>
.hg-article-header {
    display: none;
}
</style>
```

In-line text

To use a snippet to add in-line text (such as a text variable you want to use various places), follow these general best practices:

1. **In the Snippet Content section, be sure that Code Editor is selected, not WYSIWYG editor.**
2. **Add your in-line text directly into that Code Editor, with no paragraph or other tags around it.**
3. **Don't ever toggle back to the WYSIWYG Editor view, as that toggle will apply some auto-formatting like the article editor, and your text will get wrapped in a paragraph.**

Example

For example, we have a set limit on the size of files you can upload to KnowledgeOwl. Since that limit might change at some point in the future, we use a snippet to provide the text, so if we update it, we only have to update the snippet and every article referencing it will update too. The Snippet Content for this is in Code Editor and just entered directly with no HTML:

Snippet Description

This snippet contains the text for the current limit on individual file size for upload to KO.

Snippet Content Code Editor

```
200MB
```

Reusable content

The last major use case for snippets is that they can contain content you might want to reuse. Snippets can have reader group restrictions different from the article where they're embedded, so this can sometimes be a way to show content to some folks but not others.

Best practices for using snippets for reusable content include:

1. Be sure a topic article wouldn't be a better choice.
2. Make sure it's content you don't expect to turn up in search; snippet content is NOT indexed for search (topic article content is, though!)
3. We recommend using the WYSIWYG Editor for the **Snippet Content** here, to be sure the content looks and is laid out exactly how you want it.

The best use cases for this include things like:

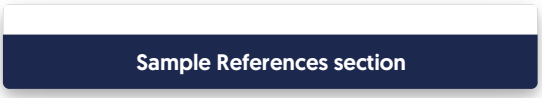
- Callouts or alerts that you want to standardize/reuse and don't need indexed for search
- Copyright statements or other disclaimers

Snippet references

Last Modified on 09/18/2024 11:15 am EDT

To help with content auditing and visibility, KnowledgeOwl tracks when you save an article or a custom content category containing a snippet's merge code. We save this information in the snippet's **References** so you can quickly locate all the places where it's used.

When you have a snippet open for editing, the righthand menu displays this **References** section:



Select **View details...** to open a modal showing a full list of the articles and custom content categories that reference this snippet. Articles include a badge that shows the article's publishing status:



The links open the article and custom content category for editing.

Intro to synonyms

Last Modified on 05/29/2024 5:28 pm EDT

You can create a list of synonyms to tell the search that multiple words or phrases have the same meaning. This allows you to standardize your content to use a single term while having your search fluidly handle different words or phrases your readers might enter.

You define a "base word" (the word you use in your content) and one or more "synonyms" (the alternate words or phrases that should return search results containing the base word).

Synonyms can be a single word or a phrase (multiple words).

When your content is indexed, we will detect any version of a synonym and add the rest of the matching terms to the index.

So if someone searches for one of those synonyms, they'll get search results for articles which have your main term.

For example, we define "knowledge base" as a base word in this Support knowledge base, and then include "kbase", "knowledge base" and "k base" as synonyms.

So if someone searches for "kbase", they'll get articles that contain "knowledge base" in them. (Don't believe us? Go search for kbase now. ☺)

Synonyms can be viewed and edited in **Library > Synonyms**.

> Authors with the default Editor role can update synonyms. If you're using a custom role, you'll need to have the **Admin** Permission to Update search settings, synonyms, and reindex search.

Synonyms are fantastic for things like:

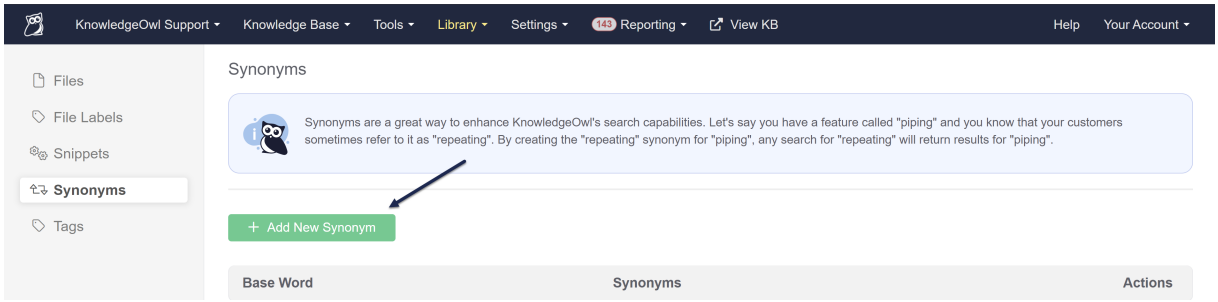
- Variations of the official term you use for something
- Acronyms or abbreviations your readers might search for that correspond to official terms--this way you don't necessarily have to include both the fully-written-out term and the acronym in every article

Create a synonym

Last Modified on 05/29/2024 5:27 pm EDT

To create a new synonym:

1. Go to **Library > Snippets.**
2. Click the **+ Add New Synonym** button.



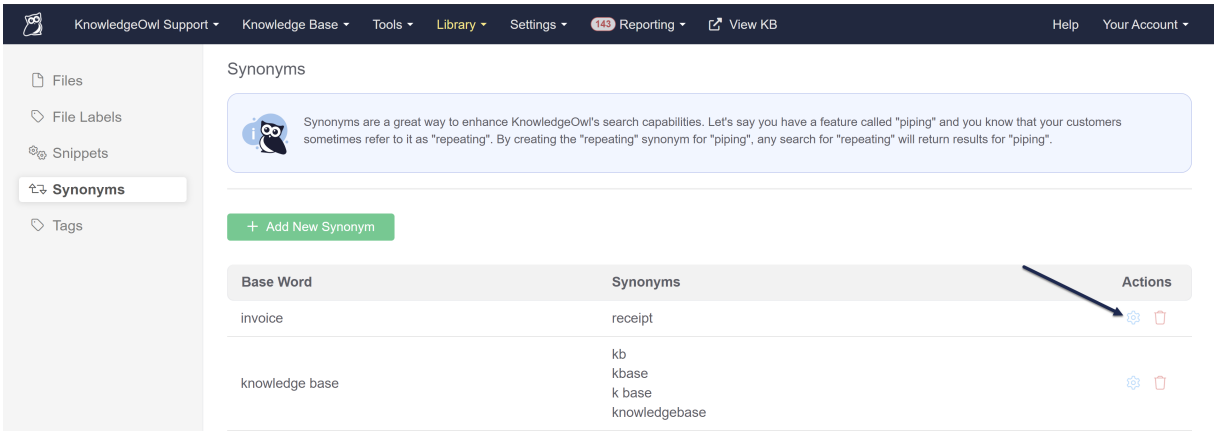
3. In the **Add Synonyms** screen, add the **Original Word** you want to define synonyms for. This should be the official or base word that you're using in your content.
4. Then add one or more **Synonyms** for that word. (You can click the plus icon to the right of the Synonym box to add multiple synonyms.)
5. Once you're done adding Synonyms, click the **Save Synonyms** button.
6. Once you've added a synonym, you'll be prompted to Run a search reindex in your knowledge base. We recommend running that reindex after-hours if your knowledge base is actively used. After you've run the reindex, your new synonym will be live!

Edit a synonym

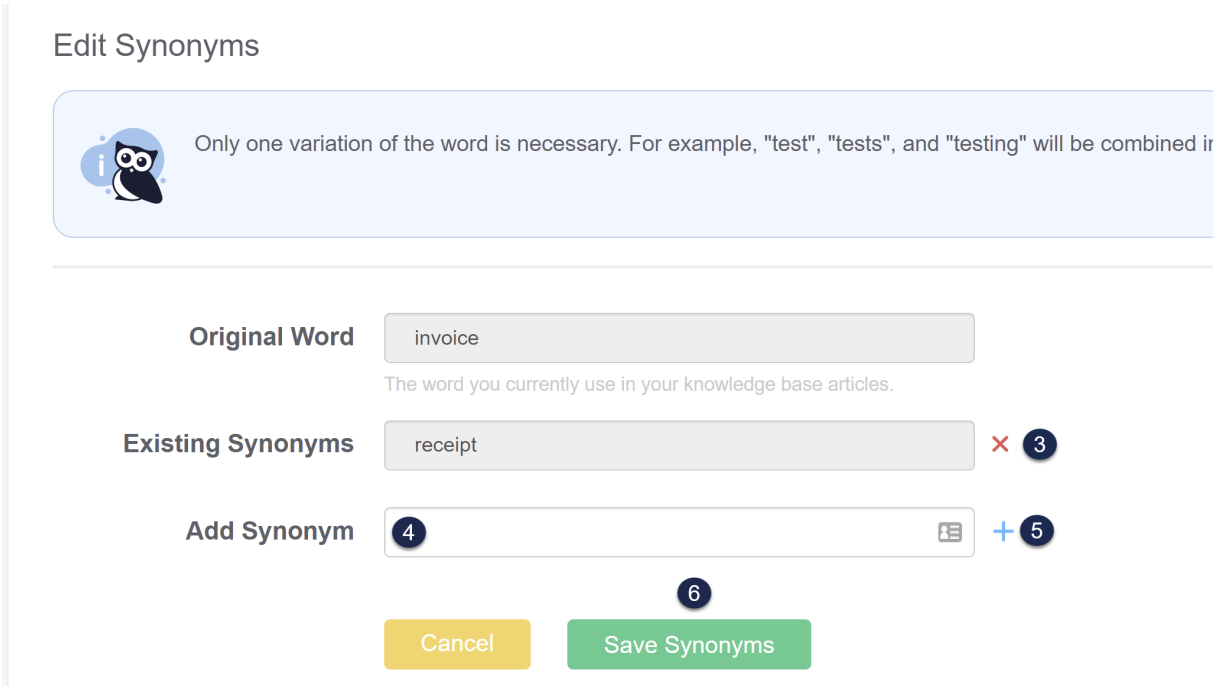
Last Modified on 05/29/2024 5:28 pm EDT

To edit a synonym:

1. Go to **Library > Snippets.**
2. Find the synonym you'd like to edit. Click the gear cog icon next that base word/synonym:



3. You can click the red X next to an **Existing Synonym** to remove it.
4. Or you can use the **Add Synonym** text box to add new synonyms.
5. If you need to add multiple new synonyms, click the plus sign next to the **Add Synonym** text box to add more than one.



6. Once you're done making your changes, click **Save Synonyms** to save your changes.
7. At this point, you'll be prompted to reindex your knowledge base. The edits to synonyms you made will not take effect until that reindex is complete.

Delete a synonym

Last Modified on 05/29/2024 5:28 pm EDT

There are two ways to delete a synonym:

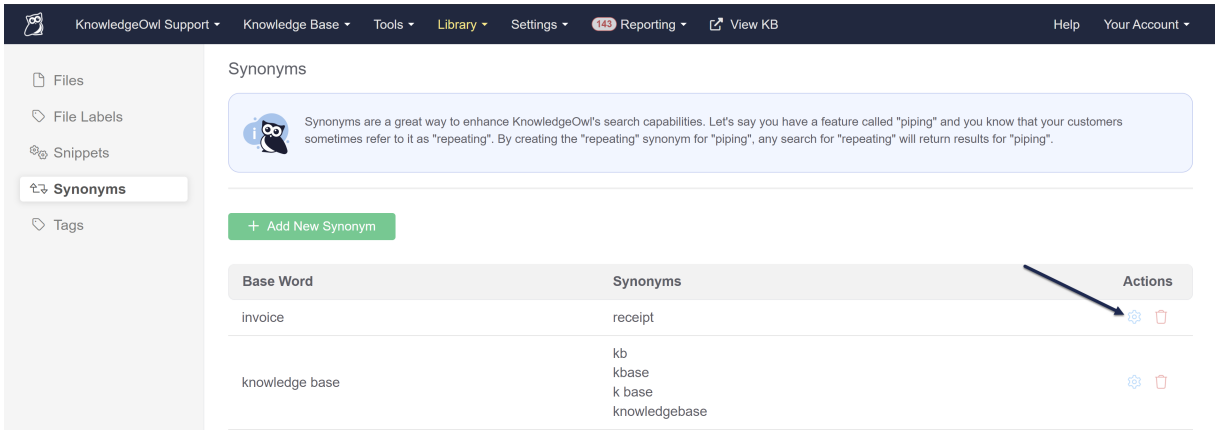
- Delete an individual synonym but leave the base word and other synonyms in place
- Delete a base word and all of its synonyms

See below for instructions on each type of deletion.

Delete an individual synonym

To delete a synonym but leave the base word and other synonyms for that base word in place:

1. Go to **Library > Snippets.**
2. Find the base word/synonym combination you'd like to edit. Click the gear cog icon to the right of it:

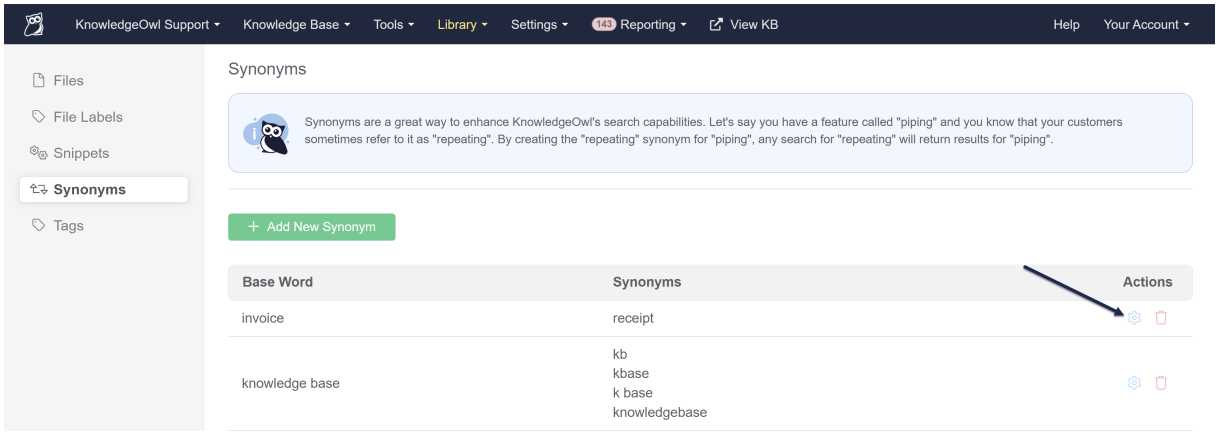


3. Find the synonym you'd like to remove in the **Existing Synonym** list.
4. Click the red X next to it to remove it.
5. Repeat for any additional synonyms you'd like to remove.
6. Once you've finished removing Existing Synonyms, click the **Save Synonyms** button to save your changes.
7. At this point, you'll be prompted to reindex your knowledge base. The deletions to synonyms you made will not take effect until that reindex is complete.

Delete a base word and all its synonyms

1. Go to **Library > Snippets.**

2. **Find the synonym you'd like to delete. Click the trash can icon next that base word/synonym:**



3. **A confirmation pop-up will appear asking you to confirm the deletion. Click OK to complete the deletion.**

4. **At this point, you'll be prompted to reindex your knowledge base. The synonyms/base word you removed will not take effect until that reindex is complete.**

Synced content overview

Last Modified on 05/29/2024 5:28 pm EDT

Have you ever wanted to put the same article in multiple categories? Do you have multiple knowledge bases and some content that should be the same in each of them?

If the answer to either of those questions is yes, then you may want to check out our synced content options below.

Within a single knowledge base, you can create Shared content articles to have the same article's content exist within multiple categories. This will keep the article's body in sync but the synced articles have different permalinks and titles, can belong in different categories, and have different reader group restrictions.

If you have multiple knowledge bases, you can use Shared content categories to sync entire categories between one knowledge base and another. This form of syncing is more thorough (it syncs the permalink and the titles, for example).

Learn more about your synced content options below!

Shared content articles

Last Modified on 05/29/2024 5:28 pm EDT

You can create shared content articles:

- Within different categories of a single knowledge base
- Between 2+ knowledge bases

Both setups behave similarly:

- The original article created first is considered the **parent** article.
- Any articles created afterward using the **Share content from an existing article** option are considered **child** articles.

The child article never has content of its own; it merely points to the content in the parent. So once the shared content article relationship is set up, only the parent's content is ever truly updated; the child just shares that content.

Because of this content mirroring, you won't ever see recent revisions in the child article; they're only visible in the parent. Revisions to both the child and parent will be displayed in the parent's Revision History.

What is shared?

The parent and child articles will share:

- Article body content
- Versions + version notes (once child is published)
- Revision history (only visible on the parent)

What isn't shared?

For parent and child articles in the same knowledge base, the parent and child articles won't share:

- Permalink
- Title
- Internal Article title
- Internal Note
- Tags
- Search phrases
- Title tag
- Meta description
- Publishing Status
- Author
- Internal flags (Template, Topic)
- URL redirect setting & URL (the checkbox as well as the URL to redirect to must be managed independently)
- Reader group restrictions
- Author team restrictions
- Article call outs

- Other restrictions (exclude from search results, etc.)
- Related articles
- Recommend on pages

How do shared content articles work with versions?

Let's say your parent article has versions.

When you first create a shared child content article, you won't see any other versions while the child article is in a Draft publishing status.

Once you publish the child article, you'll see the parent's versions in the child article.

Making a different version active in either the child or parent will automatically update all other shared articles to use that active version.

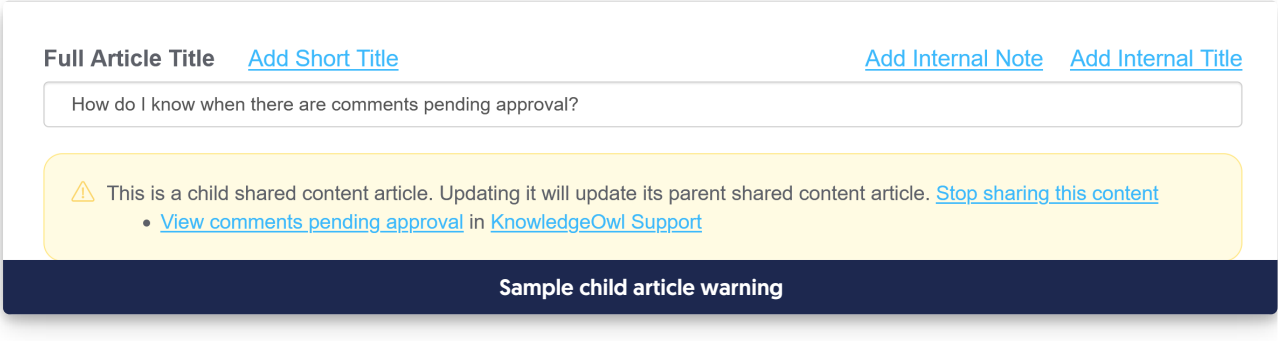
If you stop sharing content from the parent, the child article will lose all versions except the current active published one.

How can I tell if an article is a shared child or parent content article?

You can check the UI, the API, and a Manage export to determine parent-child relationships.

In the UI

Child articles have a warning between the article's title and the editor that says "This is a child shared content article. Updating it will update its parent shared content article." with links to the parent article title and the parent article knowledge base. Here's a sample:



Sample child article warning

Child article warnings will only ever show the parent article, not all children.

Parent articles have a warning in the same place that says "This is a parent shared content article. Updating it will update these child shared content articles:" and will then provide a list of links to the child shared content article's category, the child shared content articles themselves, and the knowledge base the article is in. The category the child article's within will appear before the article name. Here's a sample:



Sample parent article warning with two child articles

In the API

The shared content child article will have the parent article's ID in the `content_article` field.

The parent article will not display any information about links to child articles.

In Manage export

When you export a Manage filter to csv, check the box to include the **Shared Content Article** column in the export.

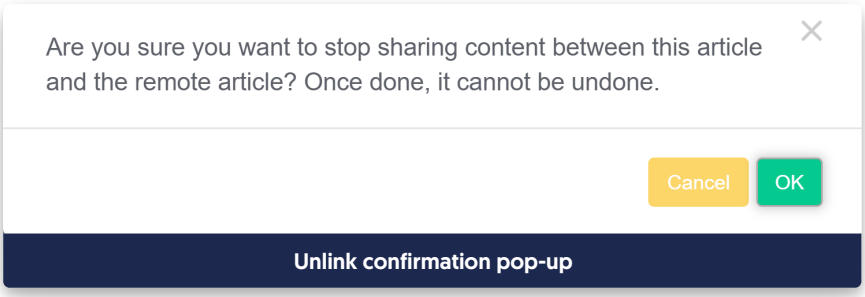
The shared content child article will have the parent article's ID in the **Shared Content ID** field.

The parent article will not display any information about links to child articles.

How do I stop sharing between two articles?

You'll need to stop sharing from the child article.

1. Open the child article in edit mode.
2. Click the **Stop sharing this content** link in the synced content warning.
3. This will open a confirmation pop-up.



Unlink confirmation pop-up

4. Click **OK** in the pop-up to stop sharing the content.

The editor page will refresh; the child article is now independent of the parent!

Side effects of stopping sharing

Obviously, the two articles will no longer share their content or versions, and they won't have the warnings in the editor linking to the other shared content article(s).

The child article:

- Will lose all other versions except the current active published one

- Won't have any revision history (the article body at the moment you stop sharing is considered the first edit to the article)

Can I switch an existing standalone article to be a child article?

Yes, you can. It must be done through the API. (Or you can contact us).

You'll use a PUT method to add the parent article's ID into the child article's `content_article` field.

If the child article had any existing content:

- You will no longer see Revision History in the UI for changes to the child article's content
- Even in the API, the child article will not keep revisions moving forward
- If you have historical revision history for the child article, you also won't see this in the UI. It is recoverable via the articlerevision API endpoint
- If you unlink the articles (using the UI link or using a PUT method which sets the `content_article` field to ''), this will free the revisions and you will see the pre-link revision history for the child article. But you won't see its revision history when it was a mirror of the parent, because that is stored at the parent.

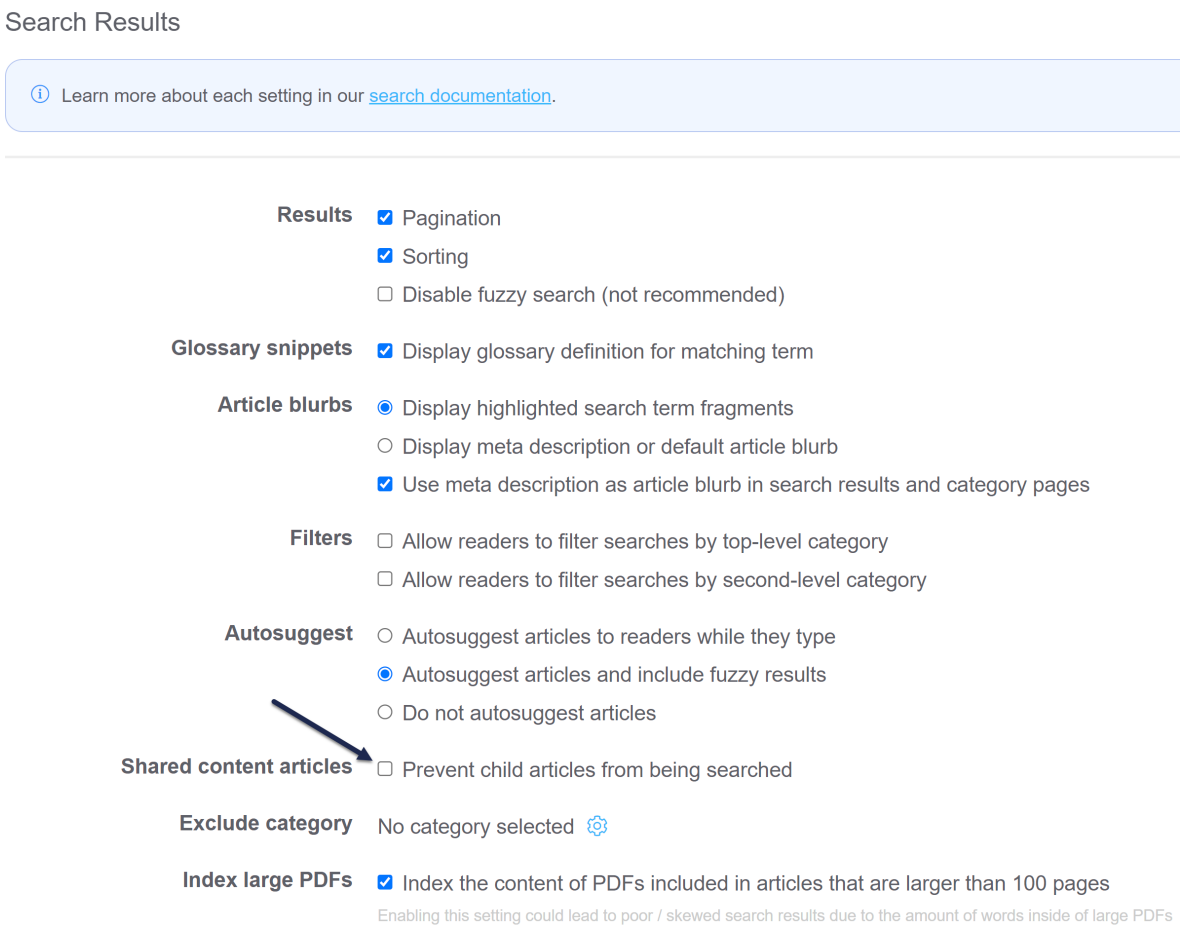
Why aren't some of my shared content articles showing up in search?

Last Modified on 05/29/2024 5:28 pm EDT

By default, KnowledgeOwl will hide child articles from search. Shared content articles and articles in synced categories are considered "child" articles if they're one of the shares or copies.

To solve this issue, you can include child articles in your search results. To do so:

1. **Go to Settings > Search.**
2. **Check the box next to Prevent child articles from being searched.**



3. **Save.**

This change will take effect immediately, and your child articles should show up in search. If they still aren't,

check:

- The article's own Exclude from search results checkbox
- The **Settings** > **Search** option for Excluded category. If a category is selected, all articles contained in the category or its subcategories will be excluded from search.

Sync behavior in shared content categories

Last Modified on 05/29/2024 5:28 pm EDT

The shared content category allows you to pull in and sync the content from a category in a separate knowledge base. You must have access to both knowledge bases to set up this kind of category.

This category type is useful when you are maintaining separate knowledge bases and have content that needs to be shared between them.

The original category is called the parent, and the synced category is called the child. Some content automatically syncs when changed in either the parent or child, while other actions don't result in synced content:

- Updating a synced article in either the parent or child updates the content in both knowledge bases, so you only need to maintain one set of articles.
- When you add new content to the parent category using **+ Add Article** or **+ Add Subcategory**, KnowledgeOwl automatically adds it to the child.
- New content added to the child category is not added to the parent.
- Content that is moved into the parent (for example, by dragging and dropping an article in the content menu) does not automatically appear in the child category.
- When you delete a synced article in the parent, KnowledgeOwl also deletes it from the child.
- Synced content can be deleted from the child without affecting the parent.

The editing permissions for synced category content are also a bit different:

- Users with access to the parent knowledge base can edit content synced to other knowledge bases even if they don't have direct access to those knowledge bases.
- Users with access to child knowledge bases are only able to edit synced content from another knowledge base if they have access to the parent knowledge base.

This allows you to control edits to the synced content by controlling who can edit the parent.

How can I tell multiple shared child articles apart?

Last Modified on 05/29/2024 5:27 pm EDT

The messages for shared child content articles include the article name and the knowledge base name. This works great if your parent and child are in different knowledge bases; but what if you have multiple children in the same knowledge base, and the same title for each?

> ⚠ This is a parent shared content article. Updating it will update these child shared content articles:
> - Onboarding procedure in My Knowledge Base
> - Onboarding procedure in My Knowledge Base

You can certainly right-click on one of those articles to see which category it's in, to tell them apart.

But this similarly-named article issue can become troublesome a number of places (like creating Link to Article, or adding a Related Article). What's an owl to do?

This is exactly what internal article titles were created for! The internal article title lets you set a title for the article that is only displayed within app.knowledgeowl.com. In this case, I could set my internal title to be something like "Onboarding procedure - Customer A" and "Onboarding procedure - Customer B". The articles will still display their full title ("Onboarding procedure") to readers, but all admins working in the editor will see that internal title instead.

Synced content in copied knowledge base

Last Modified on 05/29/2024 5:28 pm EDT

When you copy a knowledge base, all shared content links will remain intact in the knowledge base you are copying. But in the copied knowledge base, no shared content links will exist--we remove them during the copy process. All previously synced content is created as one-time copy.

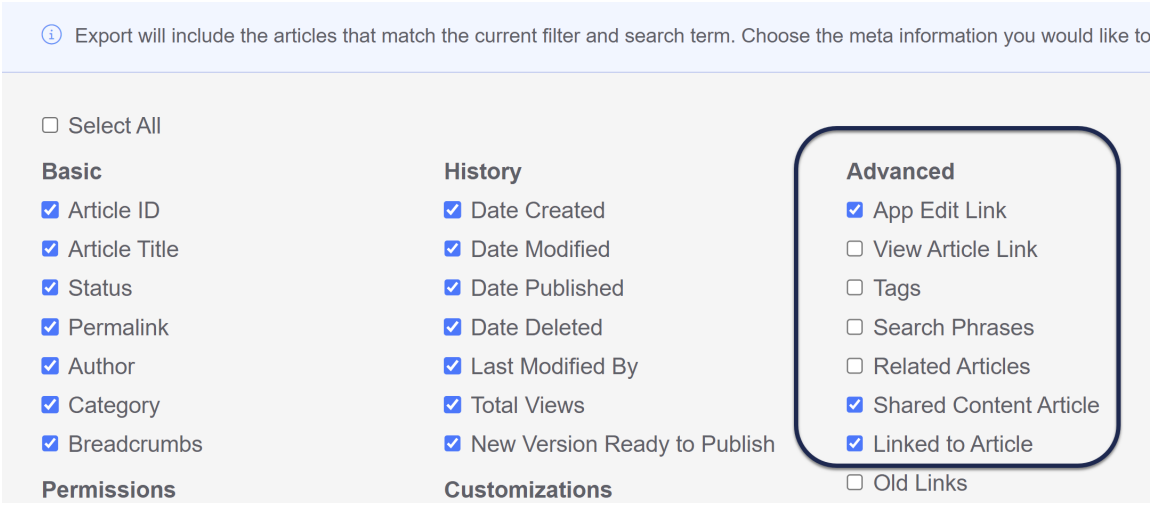
If you'd like to maintain those shared content links, you'll need to manually re-create shared content links in the copied KB. We recommend following a three-step process:

1. Use a CSV export in Manage in the original knowledge base to identify all articles with syncing relationships and determine their parents.
2. Delete and re-create shared content articles in the copied knowledge base.
3. Delete and re-create shared content categories in the copied knowledge base.

Use a CSV export in Manage

To begin this process:

1. In the upper lefthand navigation, go to **Manage**.
2. Select the All Non-Deleted filter from the filter dropdown. See Using standard Manage filters for more information on working with this type of filter.
3. Click on the option to **Export articles to CSV**. See Export the Manage Articles list to CSV for step-by-step instructions on working with these exports.
4. In the Export articles interface, be sure you check the boxes next to:
    - App Edit Link
    - Shared Content Article
    - Linked to Article



5. **Make any other selections you'd like, and then select the Export Articles button.**
6. **Download the CSV once it's available.**
7. **Open the CSV in Excel or another spreadsheet software (we use Excel below).**
8. **You can now follow the steps below to identify child shared content articles and child shared content categories.**

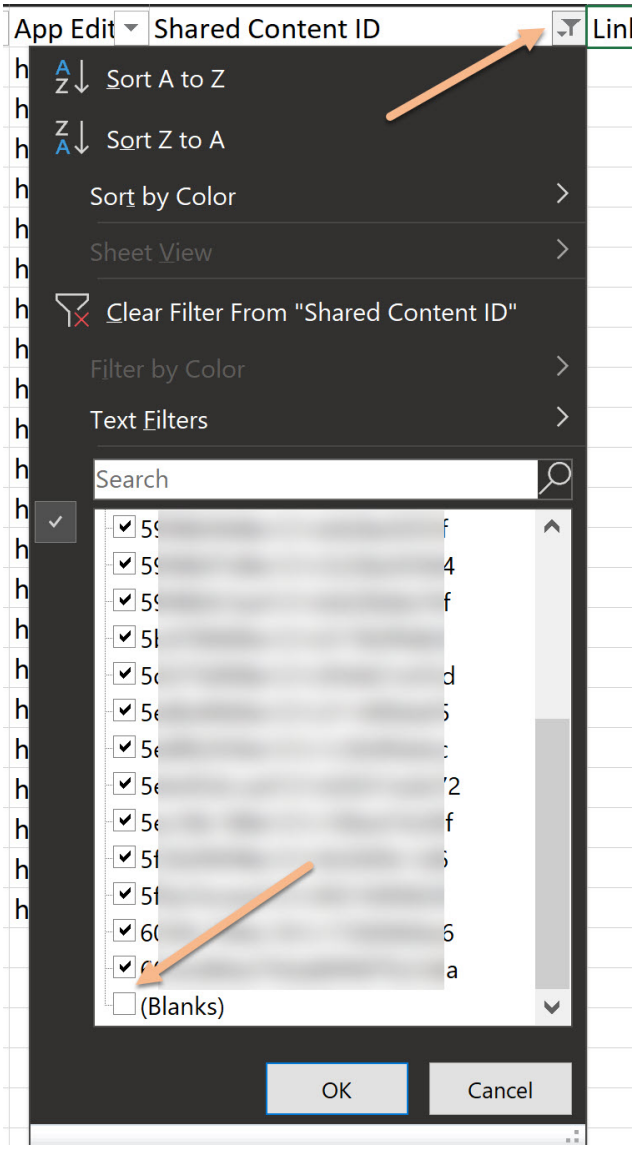
Re-creating child shared content articles

Using the Manage CSV export from above, add a filter to the Shared Content ID column.

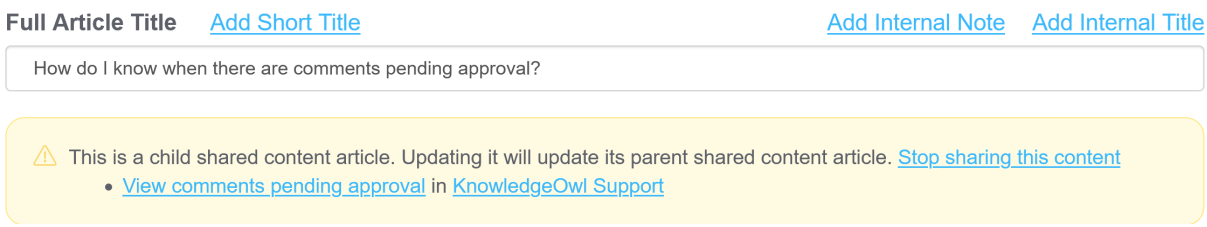
Filter to show all rows with a value in them (remove Blanks).

Articles which are shared content child articles will have the article ID of the parent article here. If this returns anything, you have shared content relationships you may want to re-create.

- **If you're using Excel, you can add filters by going to Data > Filter, then clicking on the dropdown that appears next to the column header. Uncheck the box next to (Blanks) and you'll get the list you need.**



You can use the App Edit Link value to determine the parent article, by copying that value and pasting it into your browser. This will open the article in edit mode, and you can click the hyperlink presented in the message to view its parent article.



(We recommend grabbing the parent article's information and adding it into the CSV spreadsheet in a new column to make it easier to work through this all at once.)

Ultimately, what you'll want to have is:

- **A list of the articles that are child articles (which the filters above will give you)**
- **The original parent article for those (which you can identify using the App Edit Link in the CSV export)**
- **The correct parent in the new copied knowledge base: this might be the same parent article in the original knowledge base *or* it might be an article in the new copied knowledge base--it depends**

whether the original shared content was all within one knowledge base or synced from other knowledge bases.

Using this list, for each shared content child article in your copied knowledge base, if you want to re-create them as shared content articles, you'll want to:

1. Delete the article in the copied knowledge base.
2. Create a new article in the same category, using the Share content from an existing article option.
3. Search for the appropriate parent article, which may be in the copied knowledge base or in a different knowledge base.
4. Create the article using the same title and permalink used previously.

Re-creating shared content categories

Using the Manage CSV export from above, add a filter to the **Linked Article ID** column and filter out all Blanks.

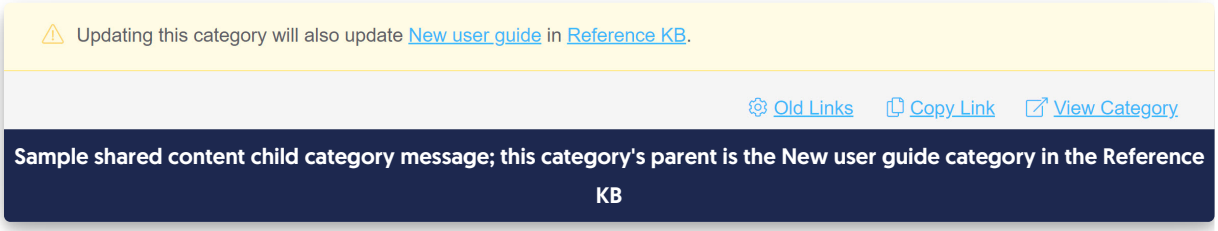
Articles which are linked as part of a shared content category will have their parent article ID in this column.

If this returns anything, you have one or more shared content categories you may want to re-create in the copied knowledge base.

In your copied knowledge base, if you want those categories to be synchronized, you'll need to delete them and re-create them as shared content categories.

First, figure out which category was synced in the original knowledge base, if you don't already know:

1. Review the Category and Breadcrumbs of the articles your filter returned.
2. Open the categories in the full breadcrumb until you get to the top-most shared content category. Shared content categories have a message across the top in the editor letting you know they are synchronized. You can use the hyperlink in the message to identify the knowledge base and category that is the parent:



Sample shared content child category message; this category's parent is the New user guide category in the Reference KB

If you want to have the category and all articles within properly synchronized in the copied knowledge base:

1. In the Articles interface in the copied knowledge base, delete the top-most category that should be a shared content category. This will delete the category and all of the articles created during the copy, which aren't synchronized.
2. In the Articles interface, add a category and use the Shared content option.
3. Use the knowledge base mentioned in the message you identified above, and search for the category by name.

4. **Once you create the category this way, it will automatically create all subcategories and articles as shared content, keeping them fully in-sync.**

Synced knowledge base

Last Modified on 05/29/2024 5:28 pm EDT

When you create a copy of a knowledge base, you can choose to make that a synced copy.

Selecting this option will:

- Create the new (child or clone) knowledge base.
- Create all the top-level categories of the original/parent knowledge base as Shared content categories in the child knowledge base.

However, the cloned knowledge base will not automatically get cloned copies of new top-level categories created in the original knowledge base moving forward.



When you create a new top-level category in the original knowledge base after you've created the synced KB, you'll need to manually create a new Shared content categories in the clone knowledge base.

For more details on how edits, content creation, and syncing happen, see Shared content categories.

Import from Confluence

Last Modified on 09/04/2024 1:10 pm EDT

If you or one of your teams has already been using Confluence as a knowledge base solution, you may have a lot of content there you'd like to move over to KnowledgeOwl. You can import that content from a Confluence space directly into your KnowledgeOwl knowledge base with a few clicks.

Before you start

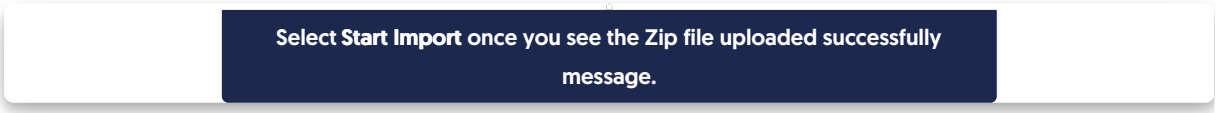
You'll need to generate an HTML export of your Confluence space. Refer to Confluence's instructions for your setup:

- Confluence Cloud: Follow the instructions to Export a space. Be sure you export as HTML.
- Confluence Server: Follow the instructions to Export multiple pages to HTML or PDF section. Be sure you export as HTML.

Download the zipped archive file and have it ready.

Import your content from Confluence

1. In KnowledgeOwl, select **Import** from the left navigation.
2. Select **Confluence Import**.
3. **Upload your Confluence HTML export zip file** by dragging the file into the box or selecting the box, browsing to the file, and selecting it.
4. Once the file's name displays in the box, select **Upload File**.
5. A progress bar displays while the file uploads. Once it's uploaded, we show a confirmation message. Select **Start Import** in that confirmation message:



The import will display a progress bar and confirm once it completes. If you're testing the import in a new knowledge base and want to make changes and try to re-import, you can delete this knowledge base and create a new knowledge base to re-test the import. Refer to Testing imports for more details.

How the Confluence import works

Confluence and KnowledgeOwl are formatted and architected differently, so the importer does some converting as it goes.

Architecturally, Confluence doesn't have the concept of categories versus articles, it just uses pages, which can

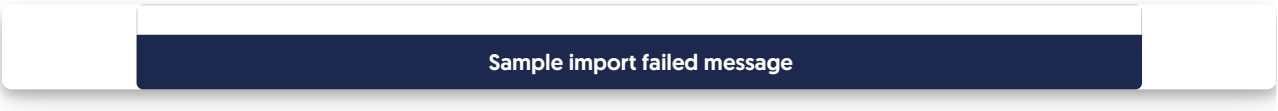
be parent or child pages. When we import them, we convert parent pages to custom content categories. Child pages without any children are converted to articles.

We also perform these style/formatting cleaning steps, designed to get your content behaving like native KnowledgeOwl content as quickly as possible:

- Remove all element class names.
- Remove all inline styles (setting fonts, font sizes, colors, etc.).
- Remove `<style>` blocks from within articles to ensure articles get your knowledge base's default styles.
- Other than the article title, we migrate all h1s to h2s, h2s to h3s, and h3s to h4s, since we display the article title as the lone h1 on the page.
- For all image elements, we add our `img-responsive` class, which helps guarantee the image will resize based on different screen sizes.
- For all tables:
  - Add our `"table-bordered"` class, which we add to new tables by default.
  - Add `style="width: 100%;"` to the table to match our default.
  - Move `<tbody><tr><th>` rows into `<tbody><thead>` rows, so they get our table header styles.

Import failures

If your file fails to import, we'll warn you that there was an issue:



Please contact us and share the HTML zip file that caused the failure so we can troubleshoot what went wrong.

Import from Zendesk

Last Modified on 09/04/2024 12:53 pm EDT

If you or one of your teams has already been using Zendesk as a knowledge base solution, you may have a lot of content there you'd like to move over to KnowledgeOwl. You can import that content from a Zendesk knowledge base/help center directly into your KnowledgeOwl knowledge base with a few clicks.

Before you start

Be sure you have admin access to your Zendesk account before you try to import, since you'll need access some options in Admin Center. Specifically, you'll need:

- your **Zendesk subdomain**
- a **Zendesk user email** with access to the Zendesk knowledge base you're importing content from
- a valid **Zendesk API token**. This may require you to enable API access in your Zendesk account. Refer to Managing access to the Zendesk API for instructions on both.

Import your content from Zendesk

1. Confirm you can get the required information from Zendesk. (Generally you can do all of this if you can access /admin/home in your Zendesk account.)
2. In KnowledgeOwl, go to **Knowledge Base > Import.**
3. Select **Zendesk Import**.
4. Enter a **Zendesk Domain**: this is your Zendesk subdomain name. For example, `knowledgeowl` is the domain we'd enter for a help center located at knowledgeowl.zendesk.com.

   Zendesk private domains
   If you're using a private domain with your Zendesk account, you'll still want to use your Zendesk subdomain here, not the full private domain.

5. Enter a **Zendesk Username**: this is the email address of an existing Zendesk user who has access to the Zendesk knowledge base. If you've accessed Zendesk to gather this information, you can generally use your own.
6. Enter a **Zendesk API Key**: Enter a valid Zendesk API token. Refer to Managing access to the Zendesk API for information on enabling API access and generating tokens. Here's what the import fields might look like importing from a knowledge base that's part of the knowledgeowl.zendesk.com account:

   Sample completed import fields
7. Once you've filled in each of the fields, select **Start Import**.

The import will display a progress bar and confirm once it completes. If you're testing the import in a new knowledge base and want to make changes and try to re-import, you can delete this knowledge base and create a new knowledge base to re-test the import. Refer to Testing imports for more details.

Import from Freshdesk

Last Modified on 09/04/2024 12:56 pm EDT

If you or one of your teams has already been using Freshdesk as a knowledge base solution, you may have a lot of content there you'd like to move over to KnowledgeOwl. You can import that content from a Freshdesk knowledge base/help center directly into your KnowledgeOwl knowledge base with a few clicks.

Before you start

You'll need a few things from the Freshdesk account to get started, specifically:

- your **Freshdesk subdomain**
- a valid **Freshdesk API key**. Refer to Freshdesk's How to find your API key documentation for more information.

Import your content from Freshdesk

1. Confirm you can get the required information from Freshdesk.
2. In KnowledgeOwl, go to **Knowledge Base > Import.**
3. Select **Freshdesk Import.**
4. Enter your **Freshdesk Domain**: this is your Freshdesk subdomain name. For example, `knowledgeowl` is the Freshdesk subdomain for `knowledgeowl.freshdesk.com`.
5. Enter a **Freshdesk API Key**: Enter your Freshdesk API key. Refer to the Freshdesk API documentation for instructions on finding your API key.
6. Once you've filled in each of the fields, select **Start Import.**

The import will display a progress bar and confirm once it completes. If you're testing the import in a new knowledge base and want to make changes and try to re-import, you can delete this knowledge base and create a new knowledge base to re-test the import. See Testing imports for more details.

Import with the API

Last Modified on 09/04/2024 12:57 pm EDT

You can use the KnowledgeOwl API to import content. The API is available on all plans, and you will need development resources to be able to use it. Visit our API documentation to learn more.

Testing imports

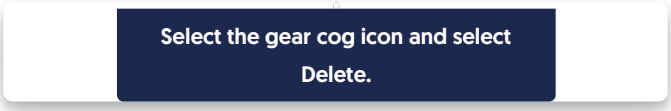
Last Modified on 09/04/2024 1:03 pm EDT

New or trial accounts

If you have a new or trial account without much content or customizations, you can test imports without worry. If something goes wrong or you want to try again, you can delete the current knowledge base and create a new one.

To delete your knowledge base and start over:

1. Select the owl in the top left to go to your dashboard.
2. Select the gear icon next to your knowledge base's name.
3. Select **Delete**.



4. A modal opens confirming you want to delete the knowledge base. Confirm the name displayed is the knowledge base you planned to delete. Select **OK** to complete the deletion.

If you only have one knowledge base, this will restart the setup process for a new knowledge base. If you have multiple knowledge base slots on your account, you can then select **+ New Knowledge Base** to try again.

Refer to Create an additional knowledge base for more information on adding a new knowledge base.

Existing accounts

If you already have an account with a knowledge base set up, you might not want to test an import in your production knowledge base. Here are a few options for testing imports outside of production:

- If you have additional knowledge base slots in your subscription, you can create a new knowledge base to test the import.
- If you do not have additional knowledge base slots, you can add more to your subscriptions under your **profile icon/name > Billing**.
- If you want a temporary knowledge base for testing, contact us so we can set you up with a complimentary sandbox knowledge base.

Import best practices

Last Modified on 09/04/2024 1:07 pm EDT

People migrating from other knowledge base tools get really excited to import content because it will "save so much time." Then, once the import is done, they begin reviewing content and making a change here, a change there, a slight organizational tweak over here...and then suddenly they end up manually reviewing and updating every single piece of content in the entire knowledge base. The total amount of time may be significantly longer than if they'd manually moved content over from scratch and made changes and edits upfront.

So we recommend a three-step approach:

1. If KnowledgeOwl has a prebuilt import tool for your previous provider, test out the import and see how you like it. (Or, if you have developer resources and are working with a different source system, explore using our API to craft your own import.)

2. Try importing a few pages manually by hand.

3. Review the output of each process and how much you like it. Choose the path forward that makes the most sense for you.

Though it may seem counter-intuitive, sometimes manually migrating your content ends up being faster, since you can do content reorganization, cross-referencing, and fix formatting issues as you go and feel fully confident at how good that content looks.

Regardless of whether you're importing in bulk or manually importing content a la carte, we recommend that you:

- Review your existing knowledge base's organization and structure. Does it meet your readers' needs? Have you always wished it was different? Now could be a great time to make some changes.
- Review content for idiosyncrasies or tweaks that were necessary in your existing knowledge base platform, but unnecessary in KnowledgeOwl's. Some differences might be the way categories can be laid out, tables of contents, links, hyperlinks, Link to Article links in KnowledgeOwl, how images or files are referenced, etc.
- Review content to make sure it's up to date. Importing out-of-date content sometimes can cause more headache than just creating new content from scratch.
- Review your content's existing permissions and access. Do you need/want to segregate content by groups? Do you need or want to restrict editing of certain content to particular author teams? If so, setting those groups and teams up in advance of adding your content can allow you to create/import it assigned to the correct access restrictions.

REST API documentation in KnowledgeOwl

Last Modified on 05/29/2024 5:28 pm EDT

When creating API documentation, very often you'll want to be able to automatically generate docs from a specification file or from the code. KnowledgeOwl does not have built-in support for this.

However, it is possible to integrate with other tools that do. This guide covers how to set up REST API documentation in KnowledgeOwl using an OpenAPI specification file (also known as Swagger spec) and Redoc (using its HTML element method). It is the same technique we use for our own endpoint reference docs.

API documentation prerequisites

Last Modified on 05/29/2024 5:27 pm EDT

- You need to have an OpenAPI spec file that is compatible with Redoc. If your spec file is version 3.0, make sure to use Redoc 2.0. Refer to Redoc's version guidance for more information.
- If you want to customize the look and feel of your API docs, you will need some knowledge of HTML and CSS and how to use your browser's developer tools.
- You should familiarize yourself with ReDoc's configuration options.

Create your API documentation

Last Modified on 05/29/2024 5:27 pm EDT

1. Create a new article, or a custom content category.

2. In **Display Settings**, select **Remove feedback ability**, **Remove comment ability**, and **Remove "Download to PDF" icon**.

3. Host your spec file, choose your Redoc source, and make a note of the URLs: your specification file, and the Redoc JavaScript file, must be hosted somewhere so that your page can load them. You can choose to host the spec file anywhere you want, and you can use Redoc's own recommended CDN to load the JavaScript:
   `https://cdn.jsdelivr.net/npm/redoc@latest/bundles/redoc.standalone.js`
   However, you can also use the KnowledgeOwl **File Library** to host both files. Refer to Files and images for information on uploading files and getting the URLs.

   When using the KnowledgeOwl file library, you need to edit the URLs. The full URL of a file has this format: https://<random-id>.cloudfront.net/app/image/id/<id>/n/<filename> Remove everything before 'app', giving you a URL with this format: /app/image/id/<id>/n/<filename>.

4. Create a snippet and add the following in the **Code Editor**view. Replace 'url-to-your-spec-file' with the URL of your OpenAPI specification file, and '' with the URL to redoc.standalone.js (this may be your own copy, or a call to a CDN).

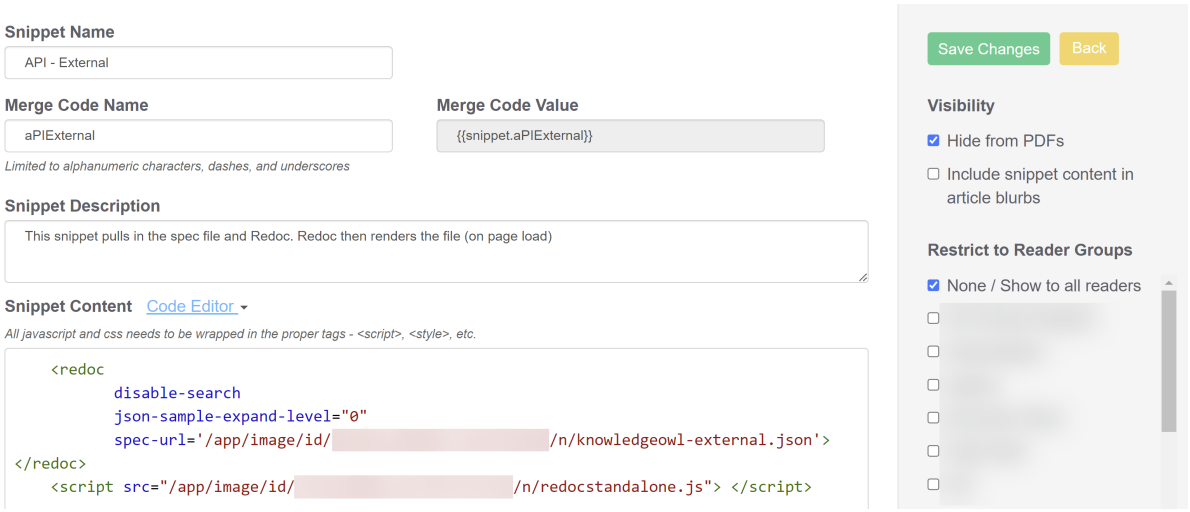
   ```
   <redoc disable-search spec-url='url-to-your-spec-file'></redoc>
   <script src=""></script>
   ```

   This adds the `<redoc>` custom element, which contains the Redoc configuration options and spec file URL. It then loads the Redoc JavaScript. When a reader visits the article, the script runs and renders the spec file.

   We recommend including the `disable-search` option. You can choose to add other configuration options to suit your needs.

5. Under **Visibility**, select **Hide from PDFs**.

6. **Save** the snippet. It should now look like this:



7. **Insert the snippet into the article or category you created in step 1.**
8. **Set the Publishing Status to Published.**
9. **Select Save. You can now view the documentation.**
10. ***Optional:*** **you can add custom styling. Some changes, such as expand/collapse behaviors, hiding elements of the Redoc theme, and so on, should be controlled using the Redoc configuration options. You can also add custom CSS to change things like colors. You could add your custom CSS to the snippet you created in step 4, or in its own snippet.**

Adding custom styles to your REST API documentation

Last Modified on 05/29/2024 5:27 pm EDT

There are two ways to customize the look and feel of Redoc's output:

- Redoc's theming options. You can set these on the `<redoc>` element. Note that the available options for the open source community edition are limited. As of 24 September 2021, there seems to be a bug affecting this functionality. You can follow the issue on GitHub. If you use this option, you may still need some custom CSS to override your knowledge base's default styles.
- Custom CSS, added to the article or category. This is the option we chose for our own docs. It gave us more fine-grained control of the look and feel, and avoided issues caused by the possible bug linked above.



Redoc's class names change with every new release. If you go with the custom CSS option, make sure you are hosting your own copy of redoc.standalone.js, and be aware that if you upgrade the Redoc version, you will need to fix your styles.

To customize the look and feel of our own docs, we created a snippet to hold the CSS. This allows us to reuse it if we wish. We then inserted the CSS snippet into our API endpoint article.

You can find out what CSS classes to target by using your browser's development tools to inspect the page source (you will need to create the documentation first, so that you can inspect it).

The following sections describe some of our custom CSS, as an example to get you started on your own custom styling.

Overriding KnowledgeOwl styles

The first thing we needed to do was override some of the styling inherited from the knowledge base theme. These changes ensure the API docs can use the full width of the screen, remove unwanted whitespace (padding and margin) around the edges, and hide some knowledge base elements that we didn't want on the page, such as the header and breadcrumbs. Your knowledge base theme may use different class names.

```
/* Allow the API docs to use the full width of the browser */
.ko-content-cntr, .hg-article {
 max-width: 100% !important;
}

/* Remove padding and margins */
.hg-minimalist-theme .hg-article-body {
  padding-bottom: 0;
}

.hg-article-body p {
 margin: 0;
}

.ko-site-footer {
 padding: 0;
}

#ko-article-cntr {
 padding-top: 0;
}

/* Hide the back to top button */
.back-to-top {
 display: none !important;
}

/* Hide the header, breadcrumbls, and article footer */
.hg-article-header, .hg-breadcrumbs, .hg-article-footer {
 display: none;
}
```

Overriding Redoc styles

Next, we targeted various Redoc classes to add our brand colors.

```
/* Right hand column background color */
.iQAzHu, .dAURiS {
 background-color: #1D284F;
}

/* Expanding text buttons under 'Responses' - brand colors and improved alignment */
/* 200 */
.jekxwK {
 background-color: #F8FBF9;
 display: flex;
 flex-direction: row;
 align-items: flex-end;
 justify-content: flex-start;
}
.jekxwK > * {
 margin: 2px;
}

/* Error */
.epQWfk {
 background-color: #F4E2E2;
 border: 1px solid #E6ADA9;
 color: #FD4339;
 display: flex;
 flex-direction: row;
 align-items: flex-end;
 justify-content: flex-start;
}
.epQWfk > * {
 margin: 2px;
}

/* Verb labels in left and right hand column - colors */
.bGXNhC, .ifwede.post {
 background-color: #017AFF;
}
.gPqqEc, .ifwede.get {
 background-color: #5c995b;
}
.hAtMod, .ifwede.put {
 background-color: #9E57B4;
}
.eZVHeg, .ifwede.delete {
 background-color: #FD4339;
}
```

REST API documentation with content security headers

Last Modified on 05/29/2024 5:28 pm EDT

If you have content security policy headers enabled in your knowledge base security settings, you cannot host the files in the KnowledgeOwl file library. The security settings prevent loading the JSON or YAML spec file.

You can still load the files from an external server, but must make sure they load over HTTPS. For example, Redoc's own example will work, so long as you update the URL to the example spec to use HTTPS:

```
<redoc spec-url='https://petstore.swagger.io/v2/swagger.json'></redoc>
<script src="https://cdn.jsdelivr.net/npm/redoc@latest/bundles/redoc.standalone.js"> </script>
```

Understand Redoc's standalone API docs

Last Modified on 05/29/2024 5:28 pm EDT

Redoc offers several ways to create API docs. For our own documentation, we use a custom HTML element and Redoc's 'redoc.standalone.js' script. This works by loading the spec file and any configuration options set in the custom element, then assembling the documentation and applying the Redoc theme. It does this every time the page loads.

There are pros and cons to this approach. It is relatively simple to implement, requires no additional software or build processes, and the look and feel are fairly easy to customize by adding additional CSS. However, be aware that large spec files will take some time to load and build, resulting in a loading screen.

An alternative method is to generate the documentation using the Redoc CLI. You can then upload the generated HTML into the file library (or host it yourself), and include it in your knowledge base using a URL redirect category or article. This removes the build step on page load, meaning faster load times and no loading screen. However, it makes it harder to apply custom styling (you are limited to the theming options supported by Redoc, which are minimal for the open source community edition). It also adds a build process that you must manage, for example installing Node.js and the Redoc CLI on your computer.

Next steps

Last Modified on 05/29/2024 5:27 pm EDT

This article has described one method of creating REST API documentation from an OpenAPI spec in KnowledgeOwl. If you want to use it, it's worth spending time reading Redoc's README and documentation. You can also view our own endpoint docs as an example.

If you don't use OpenAPI as your API specification, consider looking for other tooling similar to Redoc: if it can either pre-generate HTML, or provides a way to generate in the browser, then it may be possible to use it alongside KnowledgeOwl. We'd love to hear from you if you discover any interesting tools!

Multi-version documentation in KnowledgeOwl

Last Modified on 05/29/2024 5:27 pm EDT



While KnowledgeOwl has a built-in versions feature, this feature is intended for content management and only one version can be live at a time. If your product or software requires multiple versions to be live, you will need to use a different set of features.

If your product or software has multiple versions, you might need to have multiple versions of the documentation live at the same time. While we don't have a built-in solution, there are multiple ways to solve this with KnowledgeOwl.

1. Multiple knowledge bases, with one knowledge base per software version.
2. One knowledge bases with different articles for different versions, controlled by reader groups
3. One knowledge base using tabs in article for versions.

Pros and cons of multi-version documentation approaches

Approach	Pros	Cons	Recommended situations
Multiple knowledge bases	• Ease of use - you can copy a knowledge base and only update the documentation that changed • Works with public knowledge base - readers can choose which version and toggle between kbs • Synced categories and share content articles - keep content updated between kbs	• Cost - each knowledge base (kb) is $40/kb/month) • Setup - each kb has its own URL and security, so this will need to be set up in each kb • Maintenance - global chances will need to be made in multiple kbs	• One-time major software rebrands/updates • Enterprise customers with a custom version of the software • Similar products with different names/brand but shared content • Very small number of versions

Approach	Pros	Cons	Recommended situations
Reader groups	• Only show a single version to the reader • Can show specific content to only certain versions using snippets or topic articles	• Requires authentication • Maintenance - reader groups must be set up and managed for readers and content • No ability to toggle between versions	• Bespoke software versions where you want to restrict who can see the documention • Small number of versions
Tabs in articles	• Reader ease of use - allow readers to toggle between versions in a single article • Author ease of use - allow authors to maintain all versions in a single article • Promote upgrading to recent software versions with callouts • Optionally pass in version information through the URL or reader groups/custom fields to set the version	• Set up - tabs require custom scripting • Maintenance - scripts must be kept updated and articles must follow proper formatting for versions	• Products and software with ongoing version upgrades • Must support most recent x versions • Want to show all documentation to everyone

Use SurveyGizmo Surveys to Generate Content in KnowledgeOwl

Last Modified on 05/29/2024 5:28 pm EDT

Looking for a way to generate content quickly? Using SurveyGizmo's HTTP Connect action you can take content from a survey response and push it straight to KnowledgeOwl to create a new article!

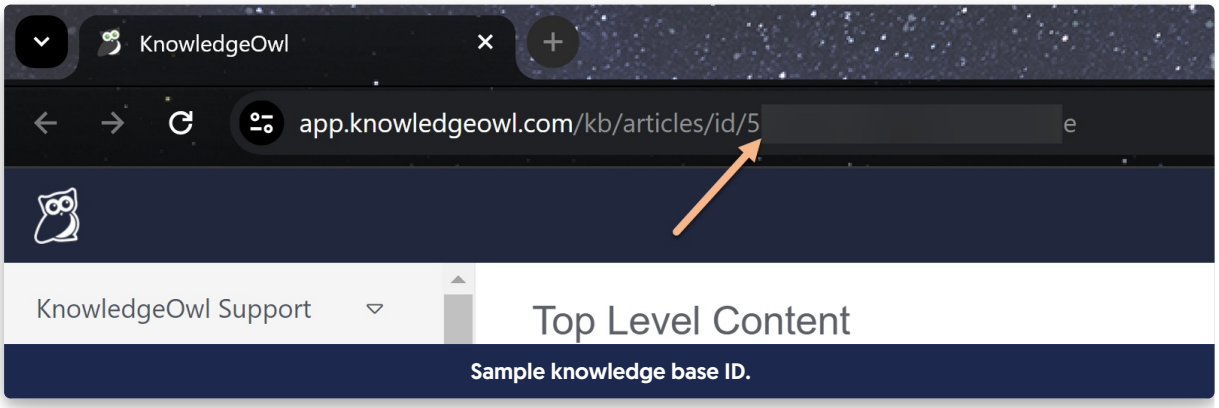
There are a million ways you can use this simple integration. SurveyGizmo uses it for outage/incident report tracking, release note archiving, and requests for new knowledge base content.

KnowledgeOwl setup

From KnowledgeOwl you'll need three things:

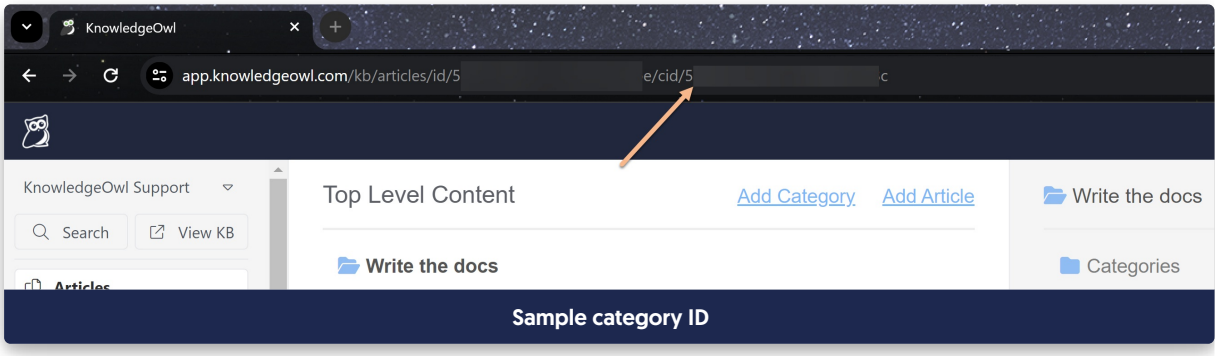
1. **Your API Key** - You can find this by going to **Your Account > API**. You can add a new key or copying an existing one. See API keys for more information.

2. **Your Knowledge Base ID** - Visible in the URL of your knowledge base. See Find your knowledge base ID or project ID for more information.



Sample knowledge base ID.

3. **Your Category ID** - You can find this by clicking on the specific category you'd like to create content. The number after **/cid/** in your URL.



Sample category ID

SurveyGizmo setup

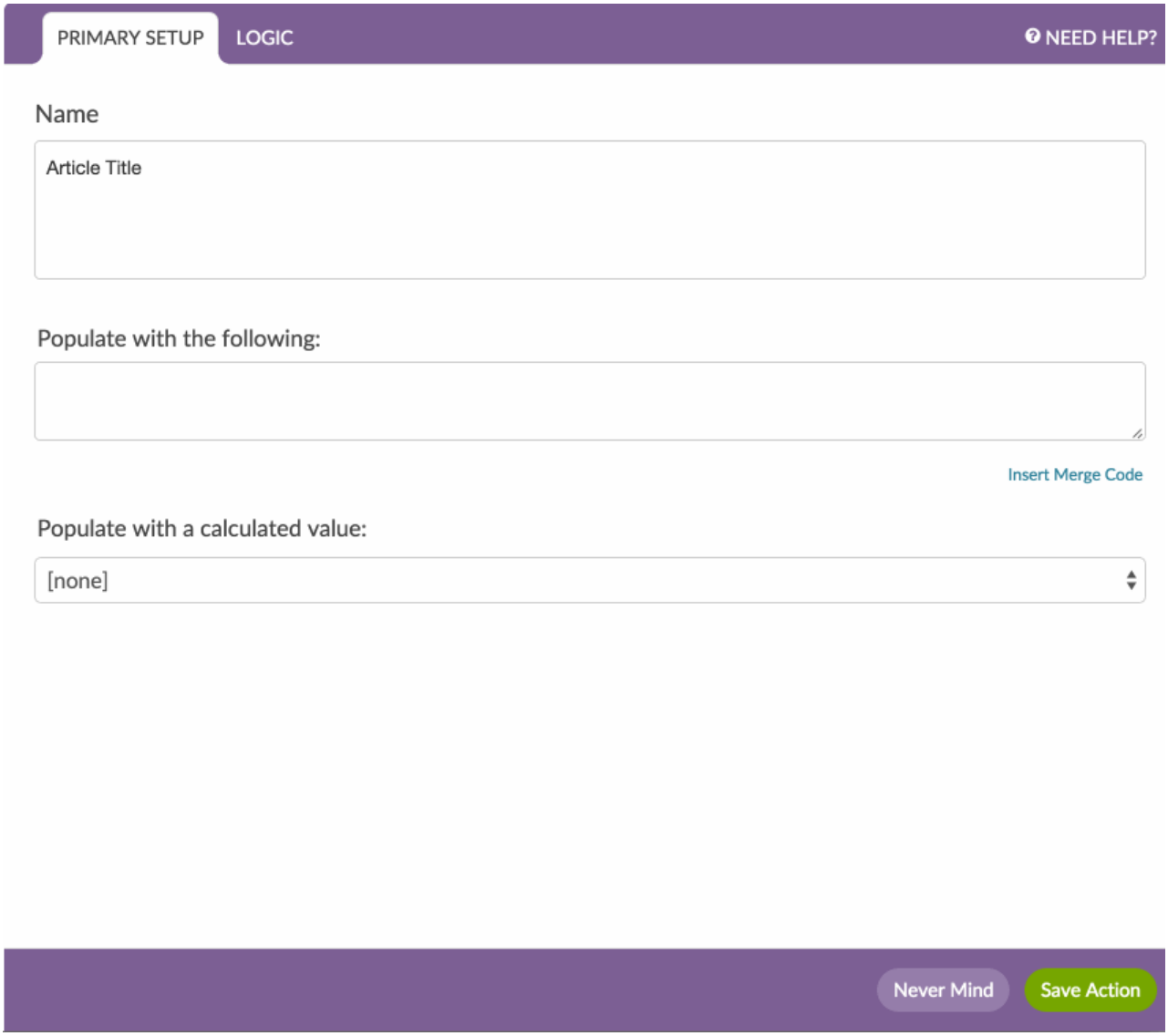
Step 1: Create your survey

In SurveyGizmo, create a survey that includes questions to collect all the data you wish to include in the new article you are creating in KnowledgeOwl. Your survey can be multiple pages if you wish.

Step 2: Set up hidden values to store your new article title and body

On *a new page that follows your question*s add two Hidden Values. One Hidden Value will store the title of the article and the other will store the of body of the article.

In both of these Hidden Values you'll be using merge codes to pull the data from your survey questions to populate the fields. For example, below is a quick demo of how we set up our Article Title Hidden Value.



As you can see, our Article Title is set up to send "New article requested by" plus what the respondent enters in the "Who are you?" question in our survey. Thus, our article titles will look like so: New article requested by James.

In the second Hidden Value include all the content that you wish to include in the body of the article. You'll

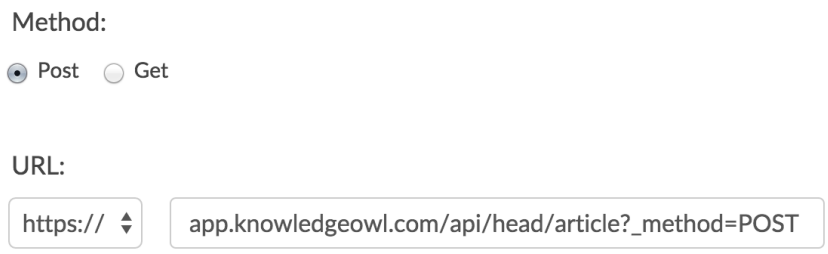
need to use HTML for any type of formatting you wish to include. We recommend, at the very least, including line breaks (<br />) so the resulting article is not one giant block of text. If you'd like to include additional formatting such as, bolding, bulleted or numbered list here is a great guide to get you started: html4_cheatsheet.pdf!

```
<b>Requester:</b> [question("value"), id="8"]
<br />
<b>Data:</b> [question("value"), id="6"] <br />
<b>More Data: </b>[question("value"), id="5"] <br />
```

Step 3: Set up an HTTP Connect Action to create your new article

Next, create an HTTP Connect Action; you'll be using this integration to send information to KnowledgeOwl.

1. Click **Add Action** on a page that follows your Hidden Values for the article title and body.
2. Give your action a name, select **HTTP Connect** and click **Save Action and Edit**.
3. For **Method** choose: **POST**.
4. The **URL** protocol must be **https**.
5. In the **URL** field copy and paste the following URL:
   app.knowledgeowl.com/api/head/article?_method=POST



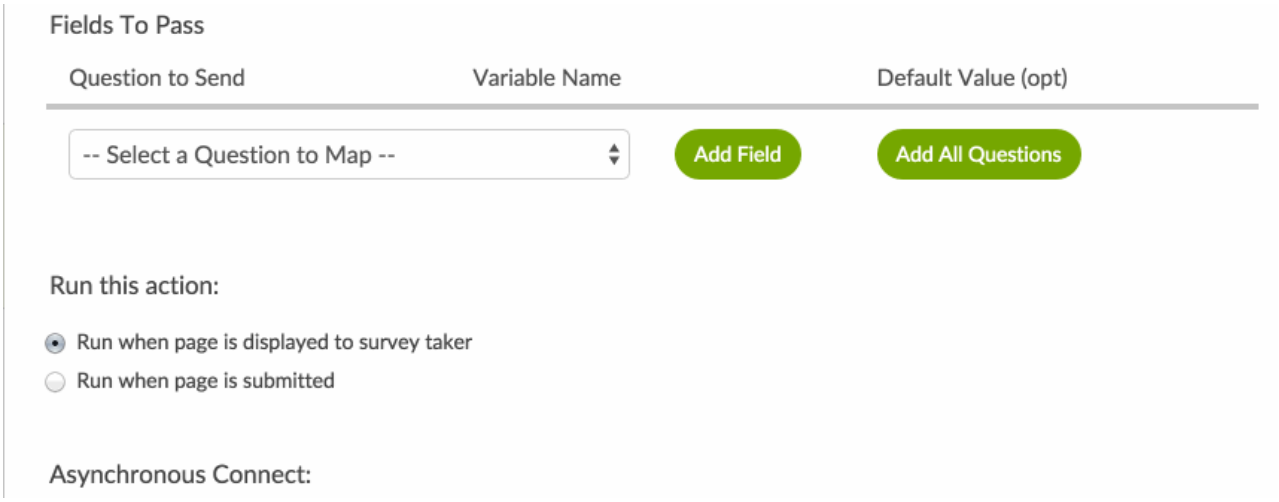
6. Under **Fields to Pass** you'll need to set up a number of fields. Some of these fields will be Static Values others will pull from a question in your survey. Here's how to set up each of these.

Setting up static fields to pass

We'll start with your API key, which is a static field.

Click the **Question to Send** dropdown and choose **Static Value (use default)**. Click **Add Field** and enter **_authbykey** (this is the authentication parameter for KnowledgeOwl's API) in the **Variable Name** field that appears. In the **Default Value** field, paste your KnowledgeOwl API key.

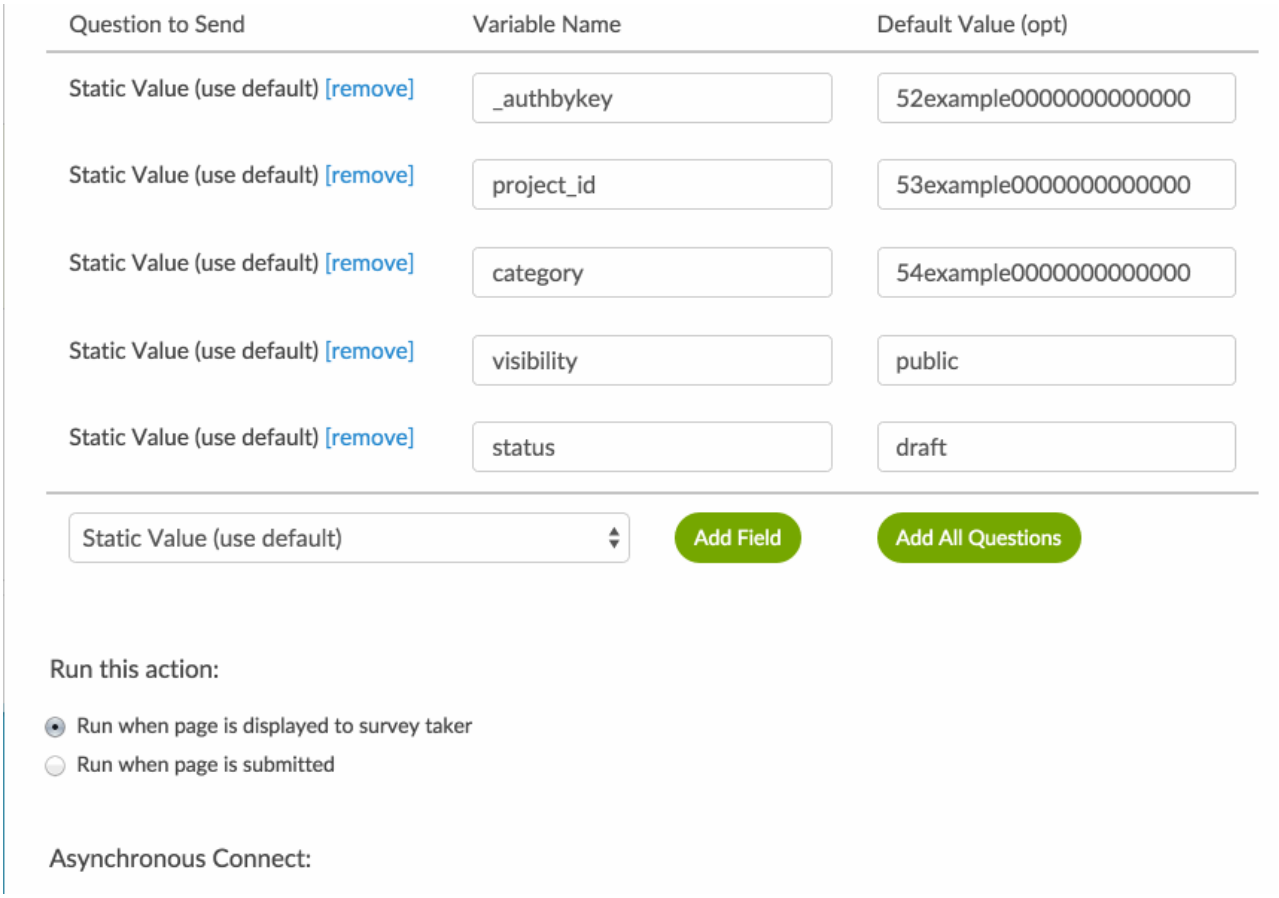
Repeat these steps for all static values that you will pass to KnowledgeOwl to create your new article. See the fields to pass reference.



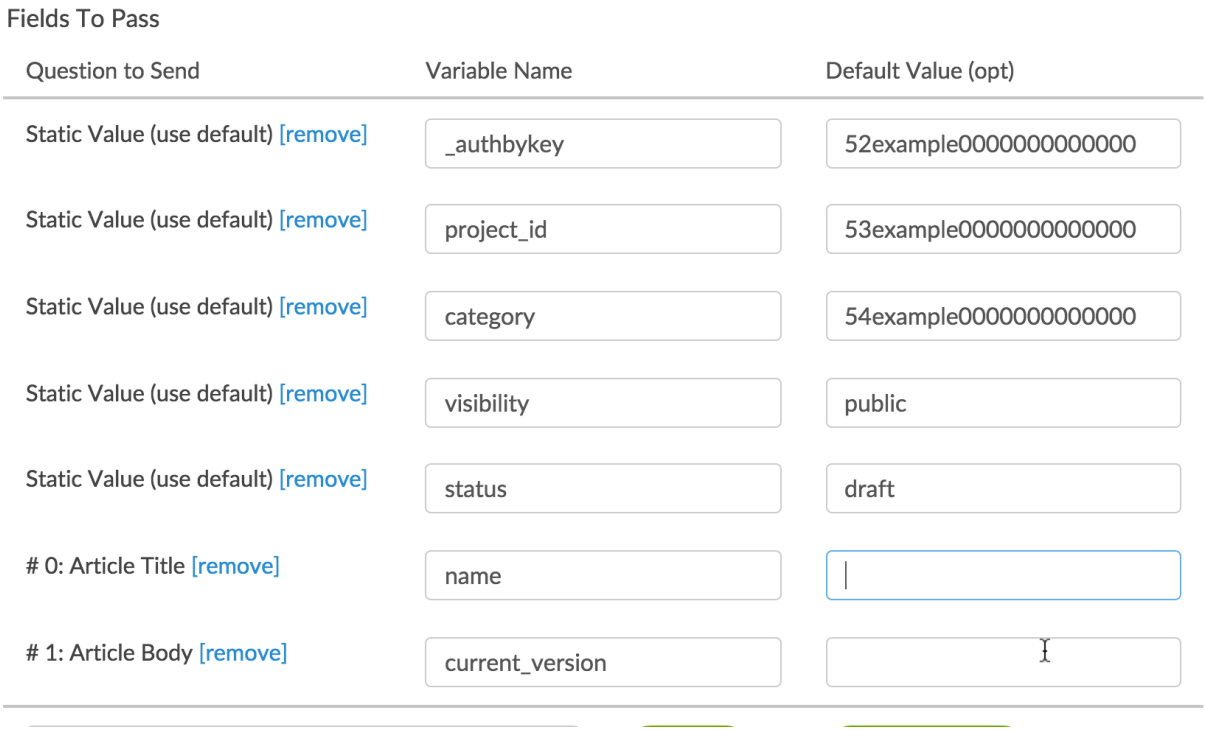
Setting up a field from your survey to pass

To add something from your survey like the Hidden Values you set up for the name of the article and article body follow these steps:

Click the Question to Send dropdown and choose the question you want to pass. Click Add Field and enter name (this is the parameter required by KnowledgeOwl for the article title) in the Variable Name field.



When you are finished your Fields To Pass section should have the following fields set up:



Reference: Fields to pass to KnowledgeOwl to create an article

Variable Name	Description	Question to Send	Default Value (If applicable)
_authbykey*	Your KnowledgeOwl API key	Static Value	ex: 52example000000000
project_id*	Your Knowledge Base ID	Static Value	ex: 52example000000000
category*	Your Knowledge Base Category you want to add the articles to	Static Value	ex: 557example00000000
visibility*	This will determine who can see your article. See knowledge owl docs for more info.	Static Value	public or custom
status*	Sets the status of the article	Static Value	published or draft
name*	This will be the name of the new article	Select the Hidden Value from the survey that contains the article name	Optional
current_version*	This will body of the the new article	Select the Hidden Value from the survey that contains the article body	Optional
index	This is the position in the category list	Static Value	Passing a 1 will add article to the top of the category

For more help building http connect actions, check out our HTTP Connect Tutorial.

To learn about other variables you can pass to KnowledgeOwl check out our API endpoint documentation.

Troubleshooting

If you get this all set up and your article does not appear in your category when testing, check the HTTP Connect action within each Individual Response. If it didn't work there are often helpful errors that appear here

like: "NONSECURE," which means you need to change your protocol in your action to https.

Tags

Last Modified on 05/29/2024 5:27 pm EDT

A tag is a word or short phrase that can be used to filter to find the article. An article may have as many tags as you like.



You do not need to add tags to optimize your content for search! Tags are not factored into search result relevancy scores.

The easiest way to think about tags is to consider them like filters for your content. These filters can be used:

- By your **readers** using a tag search (which begins with ":" followed by the tag name)
- As custom filters in **Knowledge Base** > **Manage**: if you're using tags for these kinds of internal filters only, you can mark tags as "hidden" so they won't show up to readers

For more information on working tags, see Tags.

Search Phrases

Last Modified on 05/29/2024 5:27 pm EDT

Your article title, permalink, body, meta description, and search phrases are indexed automatically for search.

You can add optional search phrases to:

- Add a phrase or term that isn't already in any of those fields so this article will be returned when someone searches those fields. Consider using the Synonyms feature for this if you consistently want the same search phrase to be associated with the same term.
- Increase the search weight of this article when the search phrase is searched. Since each of the indexed fields contribute to the search relevancy score, adding the same word or phrase here can help bump this article higher in the search results when that word or phrase is searched.

Article Short Title

Last Modified on 05/29/2024 5:27 pm EDT

If your Full Article Title is very long, you can choose to add a **Short Title** for use in navigation.

If it's defined, the Short Title is used in the table of contents instead of the Full Article Title.

If the article is within a topic display category, the Short Title can also be used in:

- The Quick Links section (if applicable)
- In place of the Full Article Title on the topic display category content itself, including:
  - Default Layout
  - Accordions Layout
  - Tabs Layout

You can control this usage of Short Titles by checking or unchecking the **Short Article Titles** Display Option in the topic display category.

Reuse Flags

Last Modified on 05/29/2024 5:27 pm EDT

The **Reuse Flags** section allows you to mark this article for two types of content reuse:

Template

What it does: Checking this box will make this article available as an article template when you choose the "Create from template" option when you're creating a new article.

What it impacts: Articles with this box checked populate the **Choose a Template Article** dropdown when the "Create from template" option is selected.

The template article is a point-in-time reuse:

- After the new article is created from the template, their content is no longer kept in sync in any way.

Topic

What it does: Checking this box will make this article available as a topic article that can be embedded in other articles.

What it impacts: Articles with this box checked will be available in search when you select **Insert Topic Article** in the Article Editor.

When a topic article is embedded in other articles:

- The content is continuously kept in sync, so edits to the topic article will also appear wherever the topic article is embedded.
- Topic articles can include Reader Group restrictions different from the article they're embedded in. For example, they can be a way to show support or troubleshooting instructions to your support team without showing those same instructions to your customers.

URL Redirect

Last Modified on 05/29/2024 5:27 pm EDT

Want to include resources that aren't categories or articles, and might not even be in KnowledgeOwl? No problem.

Use URL redirects to direct your readers to other websites, external resources, or specific files.

To use this feature, check the box to get the URL redirect fields to appear, then configure the URL redirect and the behavior you want. See our URL redirect documentation for step-by-step instructions.

Category Short Title

Last Modified on 05/29/2024 5:27 pm EDT

By default, the category's Full Category Title is what will display across your knowledge base. If this title is very long, you can add a **Short Title**.

The category's Short Title is used in the table of contents. The Full Category Title is used everywhere else.

Reader Groups

Last Modified on 05/29/2024 5:27 pm EDT

If you have individual readers logging in to your knowledge base, Reader Groups allow you to display content only to specific groups and assign which readers should see which content.

Use the **Restrict to Groups** option to restrict the current article or category to any of the reader groups in your knowledge base.

If you use the **Restrict to Groups** option for a category, all subcategories and articles within the category inherit these restrictions.

If this section shows **Add More Restrictions**, this content is already inheriting reader group restrictions from one of the categories it belongs to. Adding more groups in this section means that a reader must be a member of one of the **Inherited Restrictions** groups AND a member of one of the **Add More Restrictions** groups.

See How do reader groups work? for more information on working with reader groups.

Author Teams

Last Modified on 05/29/2024 5:27 pm EDT

By default, all authors can edit all content in your knowledge base.

If you'd like to prevent certain authors from editing articles or categories, you can create Author Teams for your authors and restrict articles or categories to editing by specific teams only.

The **Restrict Editing to Teams** section displays Author Teams configured for your account. Check the boxes next to the team(s) you'd like to restrict editing of this content to.

Authors who aren't a member of the team will be able to see the content, but they won't be able to save any changes to it.

If you restrict a category to specific author teams, all of the subcategories and articles within that category will be restricted to the same teams. When you view a subcategory or article in this situation, the **Restrict Editing to Teams** section will only display the author team(s) that the parent category is restricted to. See Inherited author team restrictions on working with this type of restriction.

Related Articles

Last Modified on 05/29/2024 5:27 pm EDT

Add articles or categories here to have them display in the Related Articles section (usually located in the footer of your article).

Click on the arrows and drag to reorder the list, or use the X to remove a related article.

Recommend On Pages

Last Modified on 05/29/2024 5:27 pm EDT

If you're using our Contextual Help Widget, use this section to identify which pages in your source website you want this content to be recommended on.

Use a relative page path for your recommendations, like `/app/documentation` rather than `https://app.knowledgeowl.com/app/documentation`.

When someone navigates to one of the page paths listed, this article or category will appear in the Recommended tab.

Topic Display Category Display Options

Last Modified on 05/29/2024 5:27 pm EDT

Here's what each of the topic display category **Display Options** does:

Quick links

When checked, this setting automatically generates and displays a clickable table of contents at the top of the category.

- If an Intro article is used, the Quick Links will display below that intro article.

Short article titles

If Short Article Titles are available for the articles, the category will display those instead of the full article title.

- This includes in the Quick Links and however the articles are displayed (accordions, tabs, etc.)

Override article links

If this box is unchecked, an article can be opened by itself at its direct URL or within the topic display category.

Checking this box means the article will always display within this category page, not on its own article page.

Intro article

When checked, this setting will display the first article in this category at the top of the page with no title.

- If this setting and Quick Links are both used, the Quick Links will display below the Intro article.

Hide description

By default, the topic display category will display its category description before anything else. When this box is checked, the category description is hidden.

See Topic display categories for more details on these settings!

Topic Display Category Layout Options

Last Modified on 05/29/2024 5:27 pm EDT

Here's what each of the topic display category **Layout Options** does:

Default

This option displays the full body of all articles on the topic display category page. The topic display category title is a Heading 1; each article title is a Heading 2 and displays the full text of the article beneath it.

Accordions

This option places each article into an expandable block, with the article title (or short title) displayed as the block heading. The blocks are collapsed and include a + / - icon displayed before them

Tabs

This option creates a separate tab for each article, using the article's title (or short title) as the tab label.

See Topic display categories for more details and screenshot comparisons of these settings!

Table of Contents Options

Last Modified on 05/29/2024 5:27 pm EDT

These options control the behavior of the category in the table of contents:

Toggle

When this option is selected, when someone clicks on or selects the category in the table of contents, the category will expand to show its contents (or collapse, if it's already expanded). Someone would need to toggle a category open and then select a subcategory or article to navigate there.

Navigate

When this option is selected, when someone clicks on or selects the category in the table of contents, that category page will open. Once the category page opens, the table of contents will display the full contents for this category.

Hide contents

By default, categories will display their contents when opened. When this box is checked, no subcategories or articles within this category will ever display in the table of contents.

See Customize category behavior in the table of contents for more details on using these settings.

Subcategory Display Types

Last Modified on 05/29/2024 5:27 pm EDT

Default categories support four subcategory display types:

Icon panels

Displays each category and its icon in a panel. If no icon has been added to the category, we'll display one of four default icons. With this layout, you can:

- Set how many categories you'd like to appear per row
- Limit how many categories to show
- Decide whether to show the category description



This is our most popular subcategory display type!

Title and description

Displays category titles and description in a simple grid format with three categories to a row.

Content list

Displays the title of each subcategory with a list of links to the first five subcategories or articles in the categories. The total number of subcategories and articles are displayed in parentheses with a link to view all. There is an option to show all child content rather than the first five.

Subcategory panels

Displays subcategory titles in plain square panels with borders, three categories to a row. Does not display category icons in the panels.

See Control subcategory display for more details on these options.

Article Display Options

Last Modified on 05/29/2024 5:27 pm EDT

You can put both articles and subcategories into default categories. The Article Display Options help you control where the articles display in relation to the categories:

Below subcategories (default)

This option will display an Articles header below your subcategories, with each article and a brief blurb about it below that. Articles will display in the order they appear in the Articles page.

Above subcategories

Use this option if you'd like the Articles section to be at the top of the category's landing page, above the subcategories.

Inline

This option won't put articles in a separate section--it will display them just like categories, using whatever subcategory display type is selected.



Inline Article Display is NOT compatible with the Icon Panels subcategory display type!

Homepage overview

Last Modified on 07/17/2024 1:26 pm EDT

Your knowledge base's homepage is the initial landing page that readers will see if they go to your default link. Usually, the homepage includes things like customer support contact information, announcements, or a description of what the knowledge base contains. You can also show a list of newest and most popular articles!

There are two places you can edit your homepage, depending on what type of edit you want to make:

1. The **Homepage** option in the lefthand navigation: This opens the homepage editor where you can add more content to your homepage, like announcements, instructions, or welcome videos.

2. **Settings > Style > Custom HTML > Homepage**: Here you can edit the overall layout, add or remove the article lists, and more. (You can also adjust styles for how things display in the **Custom CSS** section.) The text entered in the **Homepage** editor mentioned above gets inserted wherever the `[homepage("body")]` template is:



Older knowledge bases
Knowledge bases created before October 2022 or created from copies of knowledge bases created before then may have most of their HTML in **Homepage** instead of **Settings > Style > Custom HTML > Homepage**.

If you are editing **Settings > Style > Custom HTML > Homepage**, the homepage("body") template mergecode **must** appear in the Custom HTML for the Homepage, even if the **Homepage** editor is empty.

Change the homepage welcome text

Last Modified on 07/17/2024 12:29 pm EDT

A new knowledge base will display a title at the top saying "Welcome to...." with the knowledge base name after it. We populate this text based on the name you initially picked out for your knowledge base.

If you want to change that text, there are a couple different ways to do it.

If you just want to update the portion that comes after "Welcome to...": that text is based on the name of your knowledge base as it's defined in **Settings > Basic**. If you want to rename your knowledge base completely (which will also update that welcome text):

1. Go to **Settings > Basic**.
2. Update the **Knowledge base name**.
3. Be sure to **Save** your changes.

If you want to update the "Welcome to..." text in any other way:

1. Go to **Homepage**.
2. In the **Homepage content** section, edit the **Title** text.
3. You can **Preview** your changes to be sure you like them.
4. Then **Save** once you're done.

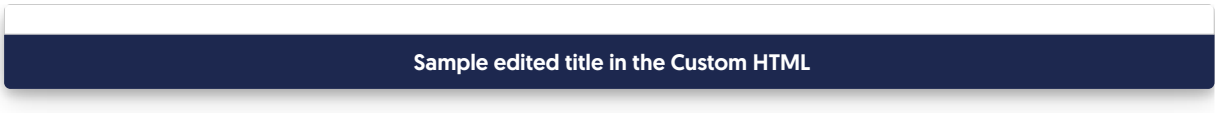
(You can also Remove the homepage welcome text completely if you so choose!)

That didn't work...

If editing the Homepage content **Title** in **Homepage** doesn't make any changes in your knowledge base, that generally means someone's already customized your homepage a bit.

In this case:

1. Go to **Settings > Style**.
2. Below the preview pane, be sure **Custom HTML** is selected.
3. In the Custom HTML dropdown, select **Homepage**.
4. Our default layout includes the title in an h1 with `class="hg-article-title xcolor"`, and someone may have edited the text there. You can update the title to one of your choice here, too!



5. You can **Preview Changes** to be sure you edited the right thing.
6. Be sure to **Save** once you like the changes you've made.

Add a background image to my homepage

Last Modified on 08/21/2024 11:36 am EDT

All new knowledge bases are created with no banner image on the homepage. If you'd like to add one, you can choose to replace it with:

- A solid color
- A color gradient
- An image of your choice

Steps for each are outlined below.

Before you begin

> **Only use if you have no banner**
> These instructions assume you do not already have a banner image set up on your homepage. If you DO already have some type of banner image or colored section on your homepage, check out Change the background image on my homepage!

Before you begin, you'll need to know two things:

- The color(s) you'd like to use for a solid color or color gradient background (hexes, RGB, or browser default names are fine) OR the image you'd like to use
- Whether you're using our out-of-the-box Support Theme or a customized theme (read on in this section for more details)

To figure out if you're using our out-of-the-box Support Theme, first, be sure your knowledge base currently doesn't display a banner image of any kind on the homepage. If it does, head over to Change the background image on my homepage instead.

Then:

1. Check if your Custom CSS begins with a comment with **General structure** at the top:



2. If it does, you're using our new Support Theme. You can follow any of the instructions below without making any adjustments.

3. If it doesn't begin with that section, your knowledge base has a customized theme. You'll need to see if there's any CSS that includes `.ko-homepage-top` and adjust that CSS. You can use the instructions below as a guide, but you may need to make additional tweaks.

Replace with a solid color

To add a solid color to your homepage banner area:

1. Go to **Settings > Style**.
2. In the **Customize HTML, CSS, and JS** section, be sure **Custom CSS** is selected.
3. Find the **Homepage Top and General** section of your Custom CSS, which should be at or near row 332:



4. The changes we're making should all be within the `.hg-minimalist-theme .ko-homepage-top` section, rows 334-338 in the screenshot above.
5. Remove `background: none;`
6. Copy the code below and paste it in where the `background: none;` was:

```
  background-color: #8bc34a; /* set background color for homepage banner */
  background-image: none; /* ensure no background image displays */
```

7. Adjust the background-color value to be the hex or rgb value of your choice.
8. Your final CSS should look something like this, with your background-color hex of choice:

```
/************************************************** Homepage Top and General */
/* get rid of background banner and add some padding to top of homepage */
.hg-minimalist-theme .ko-homepage-top {
  background-color: #8bc34a; /* set background color for homepage banner */
  background-image: none; /* ensure no background image displays */
  padding-top: 2em;
  padding-bottom: 0em;
}
```

9. *Optional:* if you'd like the banner to extend slightly below the search box on the homepage, remove the `padding-bottom: 0em;` line from that Custom CSS.
10. Be sure to **Save** your changes.

Replace with a color gradient

What if you'd rather use a color gradient, instead of a solid color, for your banner area?

Don't worry, you don't have to know anything about image editing tools and don't have to generate it yourself. There's a built-in CSS function that can do color gradients for you--you just need to know which colors you want to feed in! You'll need at least two colors to pass in to the function; you can used browser default named colors (like red, yellow, blue), hexes, or rgb values for specific brand colors.

In our example below, we use browser default named colors.

To add a color gradient area to the top of your homepage:

1. Go to **Settings > Style**.
2. In the **Customize HTML, CSS, and JS** section, be sure **Custom CSS** is selected.
3. Find the **Homepage Top and General** section of your Custom CSS, which should be at or near row 332:



4. The changes we're making should all be within the `.hg-minimalist-theme .ko-homepage-top` section, rows 334-338 in the screenshot above.
5. Remove `background: none;`
6. Copy the code below and paste it in where the `background: none;` was:

```
background-image: linear-gradient(red, yellow); /* set background color gradient */
```

7. Replace the linear-gradient values with your choice. You must have at least two colors but can have more, and you can also specify direction and/or degree. Refer to the W3School's entry for linear-gradient function for more details.
8. Your final CSS should look like this, with whatever colors you've selected:

```
/************************************************** Homepage Top and General */
/* get rid of background banner and add some padding to top of homepage */
.hg-minimalist-theme .ko-homepage-top {
  background-image: linear-gradient(red, yellow); /* set background color gradient */
  padding-top: 2em;
  padding-bottom: 0em;
}
```

9. *Optional:* if you'd like the banner to extend slightly below the search box on the homepage, remove the `padding-bottom: 0em;` line from that Custom CSS.
10. Be sure to **Save** your changes.

Replace with your own image

First, you'll need to find an image you'd like to use. This can involve some trial and error.

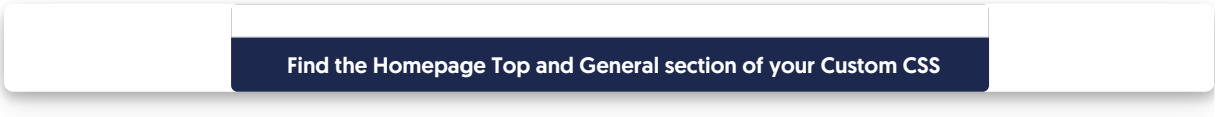
Here are some tips to help you find a good image:

- Ideally you want an image with a 5:1 aspect ratio, so it's much wider than it is tall.
- Large overall dimensions tend to work better, around 1500px x 300px is a good place to start, though we have no set requirements.
- The overall image file size should be relatively small. Ideally the image file size is in kilobytes (KB) not megabytes (MB) as large files will slow down your page load time.
- If you have the choice between a .jpg and a .png file, **choose the .png**. PNG files tend to scale better with different screen sizes, whereas .jpg can become a little fuzzy at certain resolutions. If you have the choice

for a .webp file, use that.
- Alternatively, choose a smaller image that would look nice as tiles in the background.

Once you have an image that you'd like to work with:

1. Go to **Library > Files** and upload it to your File Library.
2. Once you've uploaded your image file, find the URL. Copy it and paste it into a text editor or somewhere else--we'll need it later!
3. Go to **Settings > Style**.
4. In the **Customize HTML, CSS, and JS** section, be sure **Custom CSS** is selected.
5. Find the **Homepage Top and General** section of your Custom CSS, which should be at or near row 332:



6. The changes we're making should all be within the `.hg-minimalist-theme .ko-homepage-top` section, rows 334-338 in the screenshot above.
7. Remove `background: none;`
8. Copy the code below and paste it in where the `background: none;` was:

```
    background-image: url("/css/images/tweed.png");
```

9. Replace `/css/images/tweed.png` with the URL you copied in Step 2 from the File Library. Keep the URL in "quotes". So, for example, here's what it might look like using a URL from our File Library:

```
/********************************************************* Homepage Top and General */
/* get rid of background banner and add some padding to top of homepage */
.hg-minimalist-theme .ko-homepage-top {
  background-image: url("https://dyzz9obi78pm5.cloudfront.net/app/image/id/1ab1ab1ab1ab1ab1ab1ab1ab1/n/sa
  padding-top: 2em;
  padding-bottom: 0em;
 }
```

10. *Optional:* if you'd like the banner to extend slightly below the search box on the homepage, remove the padding-bottom line from that Custom CSS.
11. Once you're happy with your image changes, be sure to **Save** your changes.
12. If you have repeating or other issues, see the steps below to troubleshoot further.

Is your image repeating or stretched weirdly?

If your image is smaller than the space provided it will repeat itself or stretch oddly:

Sample of a repeating/tiled image

To fix this, you have two options:

1. **Add** `background-size: cover;` **to your CSS. This will stretch the image to make it fit the overall dimensions. Sometimes this works well, but sometimes it distorts or cuts off parts of the image, so take a good look at the results. Your resulting CSS should look something like this:**

```
.hg-minimalist-theme .ko-homepage-top {
    background-image: url('https://dyzz9obi78pm5.cloudfront.net/app/image/id/1ab1ab1ab1ab1ab1ab1ab1ab1/n/s
-banner-image.png');
    background-size: cover;
    padding-top: 2em;
    padding-bottom: 0em;
}
```

2. **If you don't like the look of** `background-size: cover;` **, try adding** `background-size: 100% 100%;` **to your CSS. This will try to stretch the image proportionately to fit the screen it's displayed on, which can be more elegant for lots of different devices and sometimes bypasses the off-center distortion of** `background-size: cover;` **. Your resulting CSS should look like something like this:**

```
.hg-minimalist-theme .ko-homepage-top {
    background-image: url('https://dyzz9obi78pm5.cloudfront.net/app/image/id/1ab1ab1ab1ab1ab1ab1ab1ab1/n/s
-banner-image.png');
    background-size: 100% 100%;
    padding-top: 2em;
    padding-bottom: 0em;
}
```

Change the background image on my homepage

Last Modified on 07/10/2024 4:29 pm EDT

If your knowledge base homepage already has some kind of banner image or colored background and you'd like to change it, you can change it to:

- A solid color
- A color gradient
- An image



If your knowledge base homepage doesn't have any kind of background color or image, see Add a background image to my homepage.

Before you begin

If your knowledge base already has an image on the homepage of some kind:

1. Go to **Settings > Style**.
2. Check your Custom CSS to see if it already has something set for `.ko-homepage-top.`
3. If it doesn't, you should be able to follow the instructions below exactly.
4. If it does, you'll need to adjust the CSS. You can use the instructions below as a guide.

Replace with a solid color

You can add a solid color to your homepage banner area:

1. Go to **Settings > Style**.
2. Below the preview pane, be sure **Custom CSS** is selected.
3. To add a solid background color, copy the code below and paste it anywhere into the Custom CSS editor:

```
/* Set homepage banner image */
.ko-homepage-top {
   background-color: #8bc34a; /* set background color for homepage banner */
   background-image: none; /* ensure no background image displays */
}
```

4. Replace the background-color hex in row 3 with a color of your choice.

5. You can use Preview Changes to see the difference.

6. Be sure to **Save** your changes once you're done.

Replace with a color gradient

To replace the background image with a color gradient:

1. Go to **Settings > Style**.

2. Below the preview pane, be sure **Custom CSS** is selected.

3. Copy the code below and paste it anywhere into the Custom CSS editor:

```
/* Set homepage banner image */
.ko-homepage-top {
    background-image: linear-gradient(red, yellow); /* set background color gradient */
}
```

4. Replace the linear-gradient values with your choice. You must have at least two colors but can have more, and you can also specify direction and/or degree. See the W3School's entry for linear-gradient function for more details.

5. You can use Preview Changes to see the difference.

6. Be sure to **Save** your changes once you're done.

Replace with your own image

First, you'll need to find an image you'd like to use. This can involve some trial and error. Here are some tips to help you find a good image:

- Ideally you want an image with a 5:1 aspect ratio, so it's much wider than it is tall.
- Large overall dimensions tend to work better, around 1500px x 300px is a good place to start, though we have no set requirements here.
- The overall image file size should be relatively small. Ideally the image file size is in kilobytes (KB) not megabytes (MB) as large files will slow down your homepage load time.
- If you have the choice between a .jpg and a .png file, **choose the .png**. PNG files tend to scale better with different screen sizes, whereas .jpg can become a little fuzzy at certain resolutions.
- You might also choose a smaller image that would look nice as tiles in the background.

Once you have an image that you'd like to work with:

1. Go to **Library > Files** and upload it to your File Library.

2. Once you've uploaded your image file, find the URL. Copy it and paste it into a text editor or somewhere else--we'll need it later!

3. Go to **Settings > Style**.

4. Below the preview pane, be sure **Custom CSS** is selected.

5. **Copy the code below and paste it anywhere into the Custom CSS editor:**

```
/* Set homepage banner image */
.ko-homepage-top {
   background-image: url("/css/images/tweed.png");
}
```

6. **Replace** `/css/images/tweed.png` **in row 3 with the URL you copied in Step 2 from the File Library. Keep the URL in "quotes". So, for example, here's what it might look like using a URL from our File Library:**

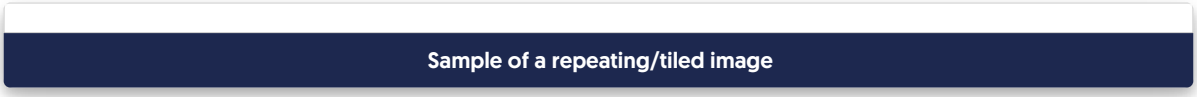
```
/* Set homepage banner image */
.ko-homepage-top {
  background-image: url("https://dyzz9obi78pm5.cloudfront.net/app/image/id/1ab1ab1ab1ab1ab1ab1ab1ab1ab1/n/sa
  padding-top: 2em;
  padding-bottom: 0em;
}
```

7. **You can Preview Changes to see the difference. If you have repeating or other issues, see the steps below to troubleshoot further.**

8. **Once you're happy with your image changes, be sure to Save your changes.**

Is your image repeating?

If your image is smaller than the space provided it will repeat itself:



To fix this, you have two options:

1. **Add** `background-size: cover;` **to your CSS. This will stretch the image to make it fit the overall dimensions. Sometimes this works well, but sometimes it distorts or cuts off parts of the image, so take a good look at the results. Your resulting CSS should look something like this:**

```
.ko-homepage-top {
   background-image: url("/css/images/tweed.png");
   background-size: cover;
}
```

2. **If you don't like the look of** `background-size: cover;` **, try adding** `background-size: 100% 100%;` **to your CSS. This will try to stretch the image proportionately to fit the screen it's displayed on, which can be more elegant for lots of different devices and sometimes bypasses the off-center distortion of** `background-size: cover;` **. Your resulting CSS should look like something like this:**

```
.ko-homepage-top {
   background-image: url("/css/images/tweed.png");
   background-size: 100% 100%;
}
```

Remove the homepage welcome text

Last Modified on 07/17/2024 1:35 pm EDT

By default, the title of your knowledge base will display above the search bar of your homepage in a "Welcome to...." statement:



You can Change the welcome text on my homepage, but in some cases you might want to remove it entirely. (For example, if you add a banner image that has your company name/logo in it already!)

To remove that welcome text completely, delete one line of HTML from the Homepage Custom HTML template:

1. Go to **Settings** > **Style**.
2. Below the preview pane, be sure **Custom HTML** is selected.
3. In the **Custom HTML** dropdown, select **Homepage**.
4. Delete the line that says `<h1 class="hg-article-title xcolor">[homepage("title")]</h1>`. In our default template and the sample below, it's in row 2:

```
<div class="ko-homepage-top">
  <h1 class="hg-article-title xcolor">[homepage("title")]</h1>
  [template("large-search")]
</div>
<div class="hg-article">
  <div class="hg-article-body">
```

5. You can **Preview Changes** to see the updated look.
6. Your custom HTML should now look something like this, and your title should be gone:

```
<div class="ko-homepage-top>
  [template("large-search")]
</div>
<div class="hg-article">
  <div class="hg-article-body">
```

7. Be sure to **Save** your changes once you're done.

Change the color of the homepage welcome text

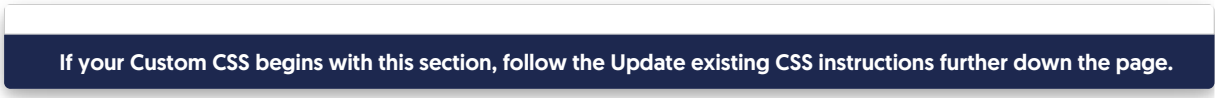
Last Modified on 07/17/2024 1:40 pm EDT

By default, the color of the "Welcome to..." statement on the homepage (the homepage title) is set to a dark blue:



To change it to another color:

1. Go to **Settings > Style**.
2. Below the preview pane, be sure **Custom CSS** is selected.
3. Check if your Custom CSS begins with a comment with **General structure** at the top:

4. If it does, follow the Update existing CSS instructions. If the Custom CSS section doesn't look like the above, stay with these instructions.
5. Copy the code below and paste it into your Custom CSS pane:

```
/* Change color of homepage title */
.ko-homepage-top .hg-article-title {
   color: #000000; /* Update to use the color of your choice */
}
```

6. Replace the #000000 on row 3 with the hex code or rbg value of your choice.
7. You can **Preview Changes** to see the difference.
8. Be sure to **Save** once you've got it looking the way you'd like.

Update existing CSS

If your Custom CSS included the **General structure** CSS in the screenshot above, you don't need to add any new CSS. You'll just need to update what's there.

1. In **Settings > Style**, still in that Custom CSS pane, scroll about halfway down the pane until you find the **Homepage Top and General** section, which is just above the halfway point:



2. Look for the third commented section here for **change default color for homepage title**, shown here in rows 5-8.

```
/* make sure category title is clickable */
.hg-minimalist-theme .hg-home-page .category-header {
  z-index: 2;
}
/* change default color for homepage title */
.hg-minimalist-theme .ko-homepage-top .hg-article-title {
  color: #1d284f;
}

/******************************************************** Content Lists */
```

3. Update the color listed in that section from hex code `#1d284f` to the hex code or rgb value of your choice.

4. Be sure to **Save** your changes once you're done!

Add category icons to your homepage category panels

Last Modified on 08/21/2024 12:32 pm EDT

By default, all new knowledge bases use category icons on their homepage. If you're using one of our older knowledge base themes, or you're using a knowledge base created from a copy of an older knowledge base, you may need to manually update your knowledge base to use category icons on the homepage.

There are two ways to use category icons in your homepage category panels:

1. **Use our pre-built merge code to do the work for you:** This requires less work and technical knowledge, but it will change the HTML structure of your homepage, which may mean you'll need to update Custom CSS to style the panels the same way.

   Recommended
   We recommend starting with this approach, since it uses built-in functionality.

2. **Keep your existing styles and use a script** (and some additional Custom CSS) to style your icons: This is a bit trickier but means you won't have to touch your current styles much.

We'll walk through each option in more detail below.

Use the merge code

To use the merge code, you'll need to update your homepage so that it's no longer using the [template("base-cats")] template.



Look before you leap
If your knowledge base is actively being used, contact us to request a sandbox copy of your knowledge base to test this template in, since it will change the styles a bit!

To generate the automatic panels for your current homepage, a template for base-cats is used. This template is usually added in one of two places:

- Top-level **Homepage**
- **Settings > Style, Custom HTML > Homepage**

1. Check each of these pages to see where [template("base-cats")] is referenced; you'll want to make the edits in the same place.

2. Once you've found where the template is added, replace "base-cats" with "icon-cats". So your merge code should now look like:

```
[template("icon-cats")]
```

3. By default, the icon-cats template will:
    - Display all of your categories
    - Display four categories per row
    - Won't display the category description
4. If you're happy with that, you can **Save** now. Otherwise, you can adjust the merge code to change this behavior.
5. To limit the number of categories it shows, add `,max=<#>`. Make sure you have no spaces, and replace <#> with maximum number of categories you want to show. For example, this merge code will limit the number of categories displayed to eight:

```
[template("icon-cats,max=8")]
```

6. To adjust the number of categories displayed per row, add `,col=<#>`. Make sure you have no spaces, and replace <#> with the number of columns of categories you want per row. For example, this merge code will display three categories per row instead of the default four:

```
[template("icon-cats,col=3")]
```

7. To show the category description below the category's icon and title, add `,desc=1`, which tells the merge code to show descriptions:

```
[template("icon-cats,desc=1")]
```

8. You can use any combination of these settings together, too. This merge code will display a total of nine categories even if there are more, and will display them in rows of three with the category descriptions shown:

```
[template("icon-cats,max=9,col=3,desc=1")]
```

9. You can use the **Update Preview** option to get a sneak peek of how that will look.
10. Once you've finished making changes, be sure to **Save** them.

If you're using the default styles on the homepage, that will shift the homepage from having two or three categories per row with this styling:



A sample knowledge base using the base-cats template

To have four categories per row with this styling:

A sample knowledge base using the icon-cats template

Styling the panels

If you have Custom CSS already applied to your homepage category tiles, that CSS won't generally work on the icon-cats template, since it constructs the HTML and CSS classes differently.

In the base-cats format, the row of category tiles is put within a `div class="category-list"` with divs for `faq-cat-panel-container` and `faq-cat-panel`, something like this:

Sample HTML structure of a homepage using base-cats

Most of the Custom CSS to style these is applied to the `faq-cat-panel` div, which handles background, border, text alignment, and more.

Once you switch to icon-cats, the format changes significantly:

- The `category-list` div picks up two extra classes (`panels` and `colx`, where x is replaced with the number of columns specified in the merge code).
- The extra `faq-cat-panel-container` is completely removed.
- The `faq-cat-panel` class changes to `cat-icon-panel`.
- The div also includes a div for `category-icon`.
- The `cat-icon-panel` gets a title set, which helps with accessibility.

Sample HTML structure of a homepage using icon-cats

The default styles we use for the icon-cats classes are:

```
.cat-icon-panel {
    border: 1px solid #e6e6e6;
    display: flex;
    align-items: center;
    justify-content: center;
    flex-direction: column;
    box-shadow: none;
    padding: 16px;
    border-radius: 5px;
    cursor: pointer;
    transition: all .2s ease-in-out;
    backface-visibility: hidden;
}

.category-icon {
    height: 100px;
    transition: all .2s ease-in-out;
}

.hg-minimalist-theme .cat-icon-panel .category-header,
.cat-icon-panel .category-header {
    font-size: 18px;
    color: #1d284f;
}

.cat-icon-panel .category-header {
    text-align: center;
}

.cat-icon-panel:hover {
    transform: scale(1.01) translateZ(0);
    box-shadow: 2px 4px 4px #aeaeae;
}

.cat-icon-panel:hover .category-icon {
    transform: scale(1.10);
}
```

You can copy these and paste them into your Custom CSS and start tweaking them to do your styles.

Updating your existing CSS

Alternatively, you can try to update your existing CSS in-place. This will take some trial and error, but here are some tips:

- **If you have any CSS that is setting the `.faq-cat-panel-container` width, you should be able to remove this completely. We no longer wrap the panels in a container to handle width; the icon-cats `col=` variable lets you set this width directly in the merge code. Be sure that your merge code contains the appropriate `col=` setting to mimic this width CSS.**
- **If you have any existing CSS specifying that `.faq-cat-panel-container` or `.faq-cat-panel` use `flex` (or any of the flex attributes), you should be able to remove that entirely. The icon-cats structure uses flex automatically.**
- **If you have existing `.faq-cat-panel` styles, try copying that CSS and adding it to the `.cat-icon-panel` class.**
    - **For example, if I have this CSS in my existing knowledge base:**

```
.hg-home-page .category-list .faq-cat-panel {
  border: 2px solid black;
  box-shadow: none;
  padding: 16px;
  border-radius: 5px;
}
```

- I can add a comma and add the same selectors but replace .faq-cat-panel with .cat-icon-panel:

```
.hg-home-page .category-list .faq-cat-panel,
.hg-home-page .category-list .cat-icon-panel {
  border: 2px solid black;
  box-shadow: none;
  padding: 16px;
  border-radius: 5px;
}
```

- Changes to the base styles for the `.cat-icon-panel` as well as the h3 within them should be fairly easy to update using this method.
- You may need to add new `:hover` styles for `.cat-icon-panel:hover` and `.cat-icon-panel:hover .category-icon` rather than updating existing styles for `.faq-cat-panel:hover`, depending on how the existing CSS was formatted. You can use the default CSS in the previous section as a base and compare that with your current CSS for hover effects to try to find the right combination.
- **Preview** is your friend when testing these CSS changes, or ask our team for a sandbox copy of your current knowledge base to test in!

Use a script

If you don't want to use the merge code, you can use the base-cats template combined with a script to extract the icons. This is a little clunkier but does work.

We strongly encourage you to try the merge code approach though, as it is slightly more accessible for screen readers and much easier to work with for future styling needs.

You can add to your knowledge base's Custom HTML and Custom CSS to extract the category icons and display them!



Before you begin
It's a great idea to have at least one category icon added to a category, so you can confirm the script is working and figure out what style tweaks might be necessary.

To get the category icons displaying on your homepage:

1. Go to **Settings > Style**.
2. Below the preview pane, select **Custom HTML**.
3. In the dropdown, select **Homepage**.
4. Copy the script below and paste it into the bottom of the Custom HTML editing pane:

```
<script>
//This script runs on the homepage and looks for category icons added to the category, extracts and displays then
  $(function() {
    $.each($(".faq-cat-panel-container"), function() {
      var imageURL = $(this).find("input.category-icon-url").val();
      $(this).find(".faq-cat-panel").prepend("<div><img class='category-icon' src='"+imageURL+"' alt=''></div>")
    });
    $('.faq-cat-panel-container').show();
  });
</script>
```

5. **Now select Custom CSS.**

6. **Copy the CSS below and paste it into your CSS. The** `.category-icon` **class can be used to style your icons as you'd like--the style here is just an example. You can play with this more or talk to our support team for additional help getting the icons to appears as you'd like!**

```
/* Hide the homepage category containers at first, so that the category icon script will display them once they run
This prevents a blip where the panels show briefly without the icon */
.hg-home-page .faq-cat-panel-container {
  display: none;
}
/* Style the category icon; you can use any variety of CSS here */
.category-icon {
  max-width: 3em;
  padding-bottom: 0.5em;
}
```

7. **You can preview your changes; just be sure you Save them once you're done.**

Variations

If you'd like the alt text of the image to be populated by the category title, use this script instead:

```
<script>
    //This script runs on the homepage and looks for category icons added to the category, extracts and displays them.
  $(function() {
    $.each($(".faq-cat-panel-container"), function() {
      var imageURL = $(this).find("input.category-icon-url").val();
      var catTitle = $(this).find(".category-header a").text();
      $(this).find(".faq-cat-panel").prepend("<div><img class='category-icon' src='"+imageURL+"' alt='"+catTitle+"'></
    });
    $('.faq-cat-panel-container').show();
  });
</script>
```

Article Lists

Last Modified on 08/07/2024 5:32 pm EDT

KnowledgeOwl offers six article lists that you can use in your knowledge base to help readers find new, updated, popular, recently viewed, required, and relevant content. These lists are automatically generated. Four are added to your homepage or articles by default; the other three are optional lists you can choose to add!

To change the number of articles displayed in each list, see Article List Settings.

Pre-added lists

Popular Articles list

Our Popular Articles List displays articles with the most traffic. This will increase your readers' engagement and your ability to get them the most common answers they might need. This list is added to your homepage by default. Refer to Remove article lists from your homepage if you'd like to remove this list from your homepage.

New Articles list

Our New Articles List displays articles that have been recently created or published. This helps your readers stay aware of newly published content. This list is added to your homepage by default. Refer to Remove article lists from your homepage if you'd like to remove this list from your homepage.

Updated Articles list

Our Updated Articles List displays articles that have recently updated content. This will increase your readers' engagement and your ability to get them the most up-to-date answers they need. This list is added to your homepage by default. Refer to Remove article lists from your homepage if you'd like to remove this list from your homepage.

Related Articles list

Our Related Articles List is used in articles to display articles that have content related to the current article the reader is reading. This will increase your readers' engagement and the your ability to get them the answers they need. This list is added to the article footer by default.

Optional/Feature-specific lists

Favorite Articles list

For knowledge bases that use reader logins and have Article Favorites enabled, the Favorite Articles List will display the articles a reader has chosen to favorite.

Recent Articles list

For knowledge bases that use reader logins, the Recently Viewed Articles List displays the current reader's most recently viewed articles. This will help readers return to articles or categories they have recently viewed. Your homepage or righthand column is an excellent place to add this list.

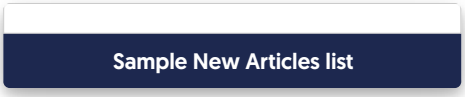
Required Articles list

For knowledge bases that use reader logins and have Required Reading enabled, the Required Articles List will display all articles marked as required. Readers can click to open articles to acknowledge them, or click the See more... link to navigate to the Required Reading page to view the complete list and see which articles they need to acknowledge.

New Articles list

Last Modified on 07/10/2024 1:44 pm EDT

Our New Articles list allows you to display articles that have been created or published most recently. This list is included by default on the homepage of all new knowledge bases.



How does it work?

KnowledgeOwl will search behind the scenes for the newest articles and display them within the list, with newest displayed at the top. Articles which have the **New** callout added to them will display before articles which do not have that callout.

A "See more..." link at the bottom of the list will take you to a full page of all New articles, located at /help/new-articles (or /home/new-articles or /docs/new-articles depending on which root path you've chosen). You can see ours here: https://support.knowledgeowl.com/help/new-articles

Out of the box, this list will display five articles. If no articles are available, it will display the text "None". If more than five are available, it includes a "See more..." link after the five articles.

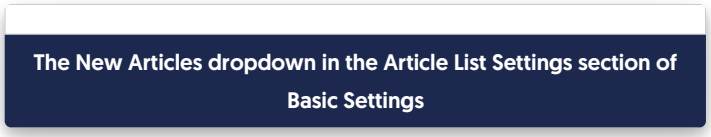
You can choose to display up to 10 articles. You can also change the article list heading, the New Articles page heading, "None", and "See more..." text.

To update any of the text, use the options in **Tools** > **Customize Text** in the **Article Lists** Knowledge Base Section. See Customize Text: Article Lists for more information.

Change number of articles in the list

By default, the five most recent articles will be displayed. You can change this to display between 1-10:

1. Go to **Settings** > **Basic**.
2. Scroll to the **Article List Settings** section.
3. Select the dropdown next to **New Articles** and select the number of articles you'd like the list to display (1-10).



4. Be sure to **Save** your changes.

In our default themes, the New Articles List is already added to:

- Your knowledge base homepage
- Your 404 error page
- Your default right column HTML

If you'd like to add it somewhere else, or if you've customized the HTML and no longer see the list on the pages listed above, review the directions below to add it! You'll need this merge code: `[template("new-articles")]`

Add the New Articles list to all articles

You can place the new articles merge code in the HTML of all articles. Go to **Settings > Style > Custom HTML** and select **Article**. You can place the merge code after the article body merge code or in the hg-article-footer div.

Either of these locations will display at the bottom of each article.

You'll probably also want to add a header to display above the new article links as well and perhaps a div with a class so that you can style the list. Something like the following should do:

```
<div class="new-articles">
 <h3>[translation("article-lists:new-articles")]</h3>
[template("new-articles")]
 </div>
```

Add the New Articles list to individual articles

If you only want to display the New Articles list in certain articles you can place the new article merge code at the bottom of individual articles. To do so, edit the article and select the **Code View** button in the upper left of the editor toolbar:



The Code View button in the editor

Scroll to the bottom of the article and paste the merge code.

You'll probably also want to add a header to display above the new article links as well and perhaps a div with a class so that you can style the list.

Something like the following should do:

```
<div class="new-articles">
 <h3>[translation("article-lists:new-articles")]</h3>
[template("new-articles")]
 </div>
```



Pro-tip
If you do this often, you can create a snippet that holds the above HTML and insert the snippet into your article, instead!

Re-add the New Articles list to the right column of your Knowledge Base

If you've removed the New Articles List from the right column of your knowledge base, you can re-add it by copying the relevant HTML from Default Right Column HTML and pasting it into **Settings > Style > Custom HTML > Right Column**.

Re-add the New Articles list to your homepage

If you've removed the New Articles list from your homepage, you can re-add it to by copying and pasting the relevant HTML from Default Homepage Article HTML into either the code view of the top-level **Homepage** or into **Settings > Style > Custom HTML > Homepage**.

Updated Articles list

Last Modified on 07/10/2024 1:41 pm EDT

Our Recently Updated Articles list allows you to display articles that have recently updated content. This will increase your readers' engagement and your ability to get them the most updated answers they need. By default, we add this list to your homepage but you can use it almost anywhere.



How does it work?

Wherever the updated articles merge code is used, KnowledgeOwl will search behind the scenes to pull a list of the articles with last modified dates, with the most recently updated at the top. Articles which have the **Updated** callout added to them will display before articles which do not have that callout.

A "See more..." link at the bottom of the list will take you to a full page of all Updated articles, located at /help/updated-articles (or /home/updated-articles or /docs/updated-articles depending on which root path you've chosen). You can see ours here: https://support.knowledgeowl.com/help/updated-articles

Out of the box, this list will display five articles. If no articles are available, it will display the text "None". If more than five are available, it will include a "See more..." link below the articles.

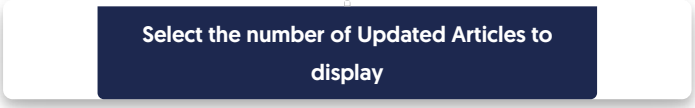
You can choose to display up to 10 articles. You can also change the article list heading, the New Articles page heading, "None", and "See more..." text.

To update any of the text, use the options in **Tools > Customize Text** in the **Article Lists** Knowledge Base Section. See Customize Text: Article Lists for more information.

Change number of articles in the list

By default, the five most recently updated articles will be displayed. You can change this to display between 1-10:

1. Go to **Settings > Basic**.
2. Scroll to the **Article List Settings** section.
3. Select the dropdown next to **Updated Articles** and select the number of articles you'd like the list to display (1-10).



4. Be sure to **Save** your changes.

In our default themes, the Updated Articles List is already added to:

- Your knowledge base homepage
- Your 404 error page
- Your default right column HTML

If you'd like to add it somewhere else, or if you've customized the HTML and no longer see the list on the pages listed above, review the directions below to add it! You'll need this merge code: `[template("up-articles")]`

Add the Recently Updated Articles list to all articles

You can place the updated articles merge code in the HTML of all articles. Go to **Settings > Style > Custom HTML** and select **Article**. You can place the merge code after the article body merge code or in the hg-article-footer div.

Either of these locations will display at the bottom of each article.

You'll probably also want to add a header to display above the updated article links as well and perhaps a div with a class so that you can style the updated articles list.

Something like the following should do:

```
<div class="updated-articles">
 <h3>[translation("article-lists:updated-articles")]</h3>
[template("up-articles")]
 </div>
```

Add the Recently Updated Articles list to individual articles

If you only want to display the updated articles list in certain articles you can place the updated article merge code at the bottom of individual articles. To do so, edit the article and select the **Code View** button in the upper left of the editor toolbar:



Scroll to the bottom of the article and paste the merge code.

You'll probably also want to add a header to display above the updated article links as well and perhaps a div with a class so that you can style the updated articles list.

Something like the following should do:

```
<div class="up-articles">
 <h3>[translation("article-lists:updated-articles")]</h3>
[template("up-articles")]
 </div>
```

Save time

If you do this often, you can create a snippet that holds the above HTML and insert the snippet into your article, instead!

Re-add the Updated Articles list to the right column of your Knowledge Base

If you've removed the Updated Articles List from the right column of your knowledge base, you can re-add it by copying the relevant HTML from Default Right Column HTML and pasting it into **Settings > Style > Custom HTML > Right Column**.

Re-add the Updated Articles list to your homepage

If you've removed the Updated Articles List from your homepage, you can re-add it to by copying and pasting the relevant HTML from Default Homepage Article HTML into either the code view of the top-level **Homepage** or into **Settings > Style > Custom HTML > Homepage**.

Popular Articles list

Last Modified on 07/10/2024 1:42 pm EDT

Our Popular Articles List displays articles with the most views. This will increase your readers' engagement and your ability to get them the most common answers they might need. By default, we display this on your homepage.

Sample Popular Articles list in a knowledge base

How does it work?

Wherever the popular articles merge code is used, KnowledgeOwl will search behind the scenes to pull a list of the articles with the highest number of views (as displayed in the Popular Articles Report in **Reporting > Dashboard**), sorted with the most views at the top. You can also Reset article views in the Popular Articles report.

A "See more..." link at the bottom of the list will take you to a full page of all Popular articles, located at /help/popular-articles (or /home/popular-articles or /docs/popular-articles depending on which root path you've chosen). You can see ours here: https://support.knowledgeowl.com/help/popular-articles

Out of the box, this list will display five articles. If no articles are available, it displays the text "None." If more than five are available, it includes a "See more..." link at the bottom of the list.

You can choose to display up to 10 articles. You can also change the article list heading, the Popular Articles page heading, "None", and "See more..." text.

To update any of the text, use the options in **Tools > Customize Text** in the **Article Lists** Knowledge Base Section. See Customize Text: Article Lists for more information.

Change number of articles in the list

By default, the 5 most popular articles (those with the most views) will be displayed. You can change this to display between 1-10:

1. Go to **Settings > Basic**.
2. Scroll to the **Article List Settings** section.
3. Select on the dropdown next to **Popular Articles** and select the number of articles you'd like the widget to display (1-10).

Select the number of articles to display from the Popular Articles dropdown

4. Be sure to **Save** your changes.

In our default themes, the Popular Articles List is already added to:

- Your knowledge base homepage
- Your 404 error page
- Your default right column HTML

If you'd like to add it somewhere else, or if you've customized the HTML and no longer see the list on the pages listed above, review the directions below to add it! You'll need this merge code: `[template("pop-articles")]`

Add the Popular Articles list to all articles

You can place the popular articles merge code in the HTML of all articles. Go to **Settings > Style > Custom HTML** and select **Article**. You can place the merge code after the article body merge code or in the `hg-article-footer` **div.**

Either of these locations will display at the bottom of each article.

You'll probably also want to add a header to display above the popular article links as well and perhaps a div with a class so that you can style the list.

Something like the following should do:

```
<div class="pop-articles">
 <h3>[translation("article-lists:popular-articles")]</h3>
[template("pop-articles")]
 </div>
```

Add the Popular Articles list to individual articles

If you only want to display the Popular Articles List in certain articles you can place the popular article merge code at the bottom of individual articles. To do so, edit the article and select the **Code View** button in the upper left of the editor toolbar:



Scroll to the bottom of the article and paste the merge code.

You'll probably also want to add a header to display above the popular article links as well and perhaps a div with a class so that you can style the list. Something like the following should do:

```
<div class="pop-articles">
 <h3>[translation("article-lists:popular-articles")]</h3>
[template("pop-articles")]
 </div>
```



Save time
If you do this often, you can create a snippet that holds the above HTML and insert the snippet

into your article, instead!

Re-add the Popular Articles list to the right column of your Knowledge Base

If you've removed the Popular Articles List from the right column of your knowledge base, you can re-add it by copying the relevant HTML from Default Right Column HTML and pasting it into **Settings > Style > Custom HTML > Right Column**.

Re-add the Popular Articles list to your homepage

If you've removed the Popular Articles list from your homepage, you can re-add it to by copying and pasting the relevant HTML from Default Homepage Article HTML into either the code view of the top-level **Homepage** or into **Settings > Style > Custom HTML > Homepage**.

Recent Articles list

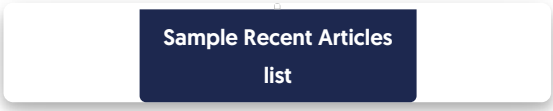
Last Modified on 07/17/2024 4:27 pm EDT

For knowledge bases using individual reader accounts, our Recent Articles list displays a reader's most-recently-viewed articles, topic display categories, and custom content categories. These links can help readers return to content where they left off, or content they frequently reference. Your homepage is an excellent place to add this article list, though you can also add it to the right column of your layout, if you're using the right column.

This list only works with individual reader accounts. Knowledge bases with default access set to public, shared passwords, or shared IP addresses will not properly populate this list.

How does it work?

To set up, you'll add the merge code for the list where you'd like the information to be displayed. Behind the scenes, KnowledgeOwl will track up to ten of the most recently viewed articles, topic display categories, and custom content categories for each reader, and display those back to the reader in the article list.



Articles are displayed with a document icon; topic display and custom content categories are displayed with a folder.

The Recent Articles list will not show:

- Default categories
- Blog style categories
- URL redirect categories
- Articles set with URL redirects

With topic display categories, if you have the option set to Override Article Links (so that opening an article always opens it within the topic display category), when a reader views an article in the category, both the topic display category and the article will appear in their recent articles list.

Setup

By default, the reader's five most recently viewed articles will be displayed. You can change this to display between 1-10:

1. Go to **Settings > Basic**.
2. Scroll to the **Article List Settings** section.
3. Select the dropdown next to **Recent Articles** and select the number of articles you'd like the list to display

(1-10):



4. Be sure to **Save** your changes.



We don't add this list to any section of your knowledge base by default.

If you'd like to add it, you'll add two merge codes into either the top-level **Homepage** or into the **Settings > Style > Custom HTML** of the relevant layouts:

- `[translation("article-lists:recent-articles")]` : this merge code grabs the Recent articles list heading in **Tools > Customize Text > Article Lists**, making it so no one has to edit the code in the future to update the title.
- `[reader("recent-articles")]` : this merge code generates the individual reader's recent articles list.

Different setups are discussed further below.

Add the Recent Articles list to your homepage (Settings > Style)

Most knowledge bases have their article lists set in **Settings > Style**. If your knowledge base uses this layout, you can follow these instructions to add the Recent Articles list there. (If your knowledge base doesn't show any article lists in **Settings > Style > Custom HTML > Homepage**, follow the next set of instructions!)

1. Go to **Settings > Style**.
2. Below the Preview pane, be sure **Custom HTML** is selected.
3. Select **Homepage** from the Custom HTML dropdown.
4. Near the bottom of the code editor, find the div with class="homepage-widgets row".
5. Copy one of the other article lists and paste that code in again.
6. Replace the title merge code with: `[translation("article-lists:recent-articles")]`
7. Replace the list merge code with: `[reader("recent-articles")]`
8. Your code should now look something like this:

```
<div class="homepage-widgets row">
   <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:popular-articles")]</h3>[template("pop-ar
   <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:new-articles")]</h3>[template("new-articl
   <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:updated-articles")]</h3>[template("up-art
   <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:recent-articles")]</h3>[reader("recent-art
</div>
```

9. You can **Preview** your changes to be sure they look right.
10. Be sure to **Save** your changes once you're done!

Add the Recent Articles list to your homepage (top-level Homepage)

There are two ways to do this, depending on how your knowledge base is set up. If you're using our older homepage:

1. In the top lefthand navigation, go to **Homepage**.
2. Copy one of the other homepage lists and paste it in again.
3. Replace the title with this merge code: `[translation("article-lists:recent-articles")]`
4. Replace the merge code with: `[reader("recent-articles")]`
5. **Save**.

Add the Recent Articles list to all articles

You can place the recent articles merge code and title in the HTML of all articles. To do so, it's best to create a div and add the title within a header and the article list merge code below that. We provide a code sample below you can copy and paste and adjust as you'd like:

1. Go to **Settings > Style**
2. Be sure the **Custom HTML** tab is selected.
3. Select **Article** from the Custom HTML dropdown.
4. Copy the code below:

```
<div class="recent-articles text-center">
  <h3>[translation("article-lists:recent-articles")]</h3>
  [reader("recent-articles")]
</div>
```

5. Paste it in wherever you'd like. We recommend placing this in the hg-article-footer div, either above or below the Related Articles section:



6. Once you're done adding the merge code, text, and any Custom CSS to style it, be sure to **Save**.

Add the Recent Articles list to individual articles

If you only want to display the Recent Articles list in certain articles, we recommend creating a snippet that includes the recent articles merge code and whatever additional formatting you'd like, and then adding that to the individual articles where you'd like the list displayed.

This helps standardize the appearance of the list, regardless of where it's added.

To do so:

1. Go to **Library > Snippets.**
2. Select the **+ Create New Snippet** button.
3. Give your snippet a **Snippet Name** and **Snippet Description.**
4. In the **Snippet Content**, create the layout you'd like for the list (usually a heading, etc.). Add the merge code for both the list and the list heading into it. Here's a sample:



5. Once you're satisfied with your snippet, select **Create.**
6. With the snippet created, you can add the snippet into any article using the **Insert Snippet** option in the editor.



Add the Recent Articles list to the right column of your Knowledge Base

If you're using an older theme that shows the right column, you might decide to display the Recent Articles list in the right column of your knowledge base. To do so:

1. Go to **Settings > Style.**
2. Be sure the **Custom HTML** tab is selected.
3. In the Custom HTML dropdown, select **Right Column.**
4. Copy the code below and paste it in where you'd like. We recommend putting it before or after one of the existing article lists:

```
<div class="panel panel-default right-col-panel recent-panel">
 <div class="panel-heading">[translation("article-lists:recent-articles")]</div>
 [reader("recent-articles")]
</div>
```

5. Be sure to **Save** your changes.

Remove article lists from your homepage

Last Modified on 08/07/2024 5:29 pm EDT

By default, your knowledge base includes three article lists on the homepage: Popular Articles list, New Articles list, and Updated Articles list.

You can remove any of these article lists.

The steps to follow depend on how old your knowledge base is.

Remove from Style Settings

In most knowledge bases, the articles are coded into the raw HTML in the **Settings > Style** page. To remove one or more article lists from your homepage:

1. Go to **Settings > Style**.
2. In the **Customize HTML, CSS, and JS** section, select **Custom HTML**.
3. In the **Select HTML section to edit** dropdown, select **Homepage**.
4. The article lists HTML begins at row 9:

```
<div class="ko-homepage-top">
  <h1 class="hg-article-title xcolor">[homepage("title")]</h1>
  [template("large-search")]
</div>
<div class="hg-article">
  <div class="hg-article-body">
    <div>[template("icon-cats,max=8,col=4,desc=0")]</div>
    <div>[homepage("body")]</div>
    <div class="homepage-widgets row">
      <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:popular-articles")]</h3>[template("p
      <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:new-articles")]</h3>[template("new-a
      <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:updated-articles")]</h3>[template("u
    </div>
  </div>
</div>
```

5. To delete the entire article lists section, delete all of rows 9-13. So your HTML would now look like this:

```
<div class="ko-homepage-top">
  <h1 class="hg-article-title xcolor">[homepage("title")]</h1>
  [template("large-search")]
</div>
<div class="hg-article">
  <div class="hg-article-body">
    <div>[template("icon-cats,max=8,col=4,desc=0")]</div>
    <div>[homepage("body")]</div>
  </div>
</div>
```

6. **To delete only one of the of the article lists, delete the row it's on from rows 10-12. So if we deleted the Popular Articles list only, our HTML might look like this:**

```
<div class="ko-homepage-top">
  <h1 class="hg-article-title xcolor">[homepage("title")]</h1>
  [template("large-search")]
</div>
<div class="hg-article">
  <div class="hg-article-body">
    <div>[template("icon-cats,max=8,col=4,desc=0")]</div>
    <div>[homepage("body")]</div>
    <div class="homepage-widgets row">
      <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:new-articles")]</h3>[template("new-a
      <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:updated-articles")]</h3>[template("u
    </div>
  </div>
</div>
```



Resize remaining lists

If you want to remove one list and have the others expand to use more space, change `col-md-4` **to** `col-md-6` **for each remaining article list.**

7. **Be sure to Save your changes to make them live!**

Remove from Homepage content editor

If your Homepage Custom HTML doesn't look like that in the samples above, your article lists are probably in the Homepage content editor. Go to the top-level Homepage option in the left navigation and use the editor to delete the article lists from the Homepage content editor.

Create a custom homepage articles list

Last Modified on 07/10/2024 1:50 pm EDT

By default, your knowledge base comes with three article lists on the homepage:

- Popular Articles list
- New Articles list
- Updated Articles list

You can also add a Recent Articles list to your homepage. But what if you'd like to build your own list?

Learn how to build a homepage articles list that populates with articles assigned a specific tag, using an API Snippet. It can be useful for setting up Frequently Referenced articles, Quick Links, and so on.



Before you begin
You must have at least one active API key in your account with **ONLY** GET permission to use this functionality. To retrieve / generate a KnowledgeOwl API key, have an account administrator go to to **Your Account > API** and create/verify that a GET-only API key exists. Refer to API keys for more information.

Step 1: Create your tag and add it to articles

In order to have a list that pulls all articles with a particular tag, the tag needs to exist and needs to be assigned to articles.

You can create a tag any time on the fly by opening an article in edit mode and typing into the **Tags** section. Once you save, the tag is created and assigned to the article.

You can see all tags in your knowledge base by going to **Library > Tags**.

Step 2: Get your tag's ID

Once your tag has been created, you'll need to know its tag ID, which is a unique identifier for that tag. We use the ID here in case the tag is ever edited--the ID won't change even if the spelling of the tag does.

There are few ways to get your tag's ID. The fastest way is to go the Tags Library and inspect the tag. We offer instructions on how to do that below. (If you have an API key and you're comfortable using it, you can make an API call to the tag endpoint to get it.)

Getting the tag ID from the Tags Library

To get the tag ID from the Tags Library, we'll use your browser's built-in Inspect option to look at the code in the page.

1. Go to **Library > Tags**.
2. Right-click on the tag whose ID you want to get and select **Inspect**.
3. This will open some element details for the tag in a different pane. Look two rows up from the tag-pill with the text of the tag you selected. The **value** listed there is the tag ID:

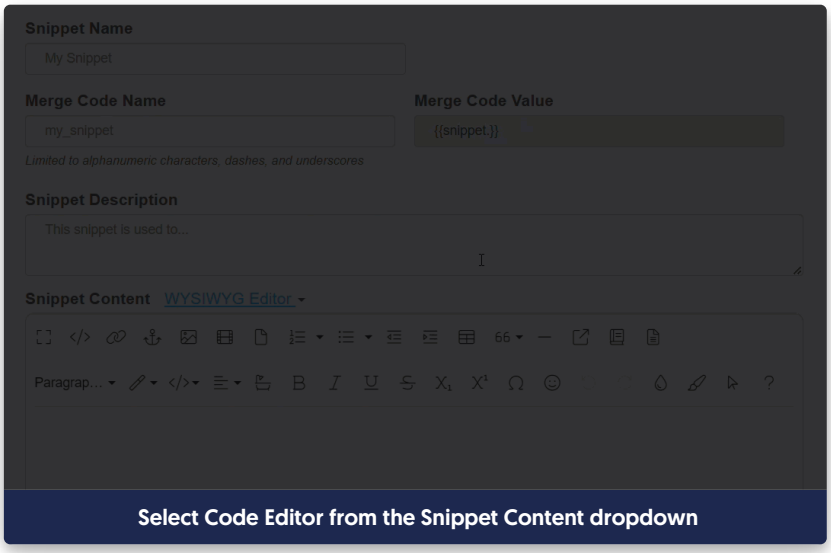
Sample tag ID in dev tools

4. Copy and paste this tag ID somewhere for later.

Step 3: Create a snippet that looks up articles for your tag

Now the real fun begins. We'll create an API snippet that will pull the list of articles that have that tag assigned, so it can be displayed in a list on the homepage:

1. Go to **Library > Snippets**.
2. Select the **+ Create New Snippet** button.
3. Give your snippet a name. In this example, since I'm using the tipsandtricks tag, I'll call it tipsandtricks Articles.
4. The Merge Code Name will be automatically generated from the snippet name. You can edit it if you'd like.
5. Add a description so you remember what this snippet does.
6. Select the **Snippet Content** editor, which should say **WYSIWYG Editor**, and select **Code Editor** instead.



Select Code Editor from the Snippet Content dropdown

7. Once in Code Editor, copy and paste the code below into the editor:

```
<ul class="list-unstyled stat-list" id="<name>">
</ul>


<script>
$(function(){
   //get all articles inside
   $.get('[ko_api(article|{"project_id": "%cur_kb_id%", "tags": {"$in":["<tag-id>"]},"status": {"$in": ["published", "
      function(data) {
         if(data && data.data && data.data.length > 0) {
              $.each(data.data, function(index, article){
                $("#<name>").append('<li><div><a href="https://support.knowledgeowl.com/help/'+article.url_has
             });
          }
        }).fail(function(error) {
        //failed
   });
});
</script>
```

8. In row 1, replace `<name>` with a label or name that makes sense for your list. Be sure you keep the quotes around it. So if I'm creating this for my tips and tricks, I might use `id="tips"`.
9. Use that same name in row 12, where it says `$("#<name>")`. Be sure to keep the quotes and the # in front of it. So if I used `id="tips"` for the first one, I'll use `$("#tips")` here.
10. In row 8, replace `<tag-id>` with the tag ID you copied in Step 3. Keep it in "quotes".
11. In row 12, if your knowledge base URL ends in something other than /help (such as /docs or /home), update the <a href="https://support.knowledgeowl.com/help/' portion to have the correct location. Replace "/help' with "/home' or "/docs' as appropriate.
12. Here is what my complete snippet looks like for my tipsandtricks tag. In my case, the knowledge base I'm in was using /docs, so I updated row 12 to reflect that change:

    Sample completed snippet that uses the id "tips" and the /docs/ URL instead of /help/
13. *Optional:* if you'd like this list to only be displayed to certain groups, use the **Restrict to Reader Groups** checkboxes in the right panel to choose the groups to show it to.
14. Once you've finished making changes, select the **Create** button to create and save your snippet.

Step 4: Test your snippet

To test that your snippet is working:

1. Create a new article.
2. Add the snippet to your article.
3. Publish the article and view it. If your snippet is working, you'll see a list of the articles with the tag you used. If it's not working, be sure you have at least one API key, and be sure that the a href path matches

your knowledge base. Reach out to our support team if you're having issues.

Step 5: Add your snippet to your homepage

Now that all the architecture is built for the list, let's add it to the homepage. How to do this depends on where you'd like to add the list:

- If you'd like to add the list in with your existing article lists, or replace one of those article lists, follow the instructions to Update the Homepage Custom HTML.
- If you'd like to add the list below the categories on the homepage but above all the other lists, follow the instructions to Update the Homepage content.
- If you're using an older theme with a Right Column and you'd like to add the list there, follow the instructions to Update the right column.

Update the Homepage Custom HTML

If your knowledge base is not using the [homepage("body")] template, you can add the snippet merge code for your API snippet directly into the Custom HTML. You'll need to reference the snippet's Merge Code Value:

1. Go to **Library > Snippets**.
2. Open the snippet you created for this list.
3. Copy the snippet's **Merge Code Value**.
4. Go to **Style > Settings**.
5. Be sure **Custom HTML** is selected.
6. Select **Homepage** from the Custom HTML dropdown.
7. Paste the merge code into an appropriate div, paragraph, or whatever you'd like here. If in doubt, you can copy the HTML for one of the other lists, swap out the titles, and replace the article list's template merge code with the snippet merge code.

Update the Homepage content

If you want to place this list in your homepage's body content within the [homepage("body")] template, rather than editing the Custom HTML directly, it is easier to edit the homepage content itself. To do so:

1. Select **Homepage** from the lefthand navigation.
2. Create a heading for the section, like "Tips & Tricks".
3. Use the **Insert Snippet** option to insert your snippet merge code beneath the heading.



4. You can **Preview** the changes if you'd like, but be sure you click **Save** to save them!



If something in the format doesn't look correct, you can switch to Code View here, copy the HTML for one of the other lists to ensure it matches, paste it, and then update it with the snippet

merge code and title of your choice!

Update the right column

If you want to add the new list into your Homepage Right column:

1. Go to **Library > Snippets**.
2. Click on the snippet you created for this list.
3. Copy the snippet's **Merge Code Value** and paste it somewhere where you can find it.
4. Go to **Settings > Style**.
5. Select **Custom HTML > Right Column**.
6. Wherever you'd like to add the list, copy the code below and paste it into that HTML:

```
<div class="panel panel-default right-col-panel <custom-panel>">
 <div class="panel-heading"><list-title></div>
 <snippet-merge-code>
</div>
```

7. In row 1, replace `<custom-panel>` with a label for this panel that makes sense (I used "tip-panel"). Be sure that you leave the closing quotation mark.
8. In row 2, replace `<list-title>` with the title you'd like displayed (I used Tips & Tricks).
9. In row 3, replace the `<snippet-merge-code>` with the merge code you copied in Step 3.
10. So if I adjust this for my Tips & Tricks setup, it might look like this:

```
<div class="panel panel-default right-col-panel tips-panel">
 <div class="panel-heading">Tips &amp;amp; Tricks</div>

</div>
```

11. **Save** your changes.

Use Cases

You can use lists like this to provide curated lists of content on your homepage that will update dynamically based on a tag being added to or removed from articles. In internal knowledge bases, these can be a great way to put frequently-referenced articles on your homepage. In software support knowledge bases, these can be a great way to highlight documentation from your latest release. We've also seen customers use these for Announcements.

You can replace all the out-of-the-box homepage article lists, or just one, or add additional lists (though you may have to play with formatting for more than 3 to look good).

Have you added a custom article list to your homepage? Share your use case with us!

Add a custom banner with built-in div styles

Last Modified on 07/17/2024 12:28 pm EDT

It can be helpful to add a banner or announcement to your homepage to draw attention to outages, changes in policy/procedure, or to highlight certain content. There are a number of ways to do this, but here we'll use a fairly straightforward approach: using your knowledge base's existing div styles.



The fastest way to create this banner and get it looking exactly how you want is to use our built-in div styles in the article editor, create the banner exactly how you'd like, and then copy that raw HTML and paste it straight into your theme.

If that sounds intimidating, don't worry, let's walk through it step by step!

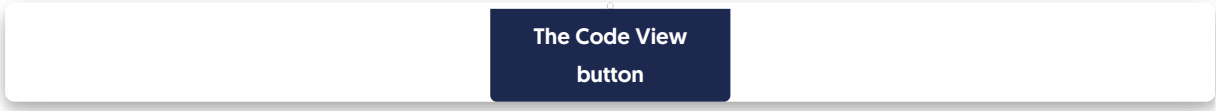
Step 1: Create your div

First things first: let's use the article editor to create and style the div we want to use.

1. Open an article in edit mode (we find it easier to create a new article for this so it's empty of any other code, but do whatever you feel comfortable with!).
2. In the editor controls, select the magic wand next to the text formatting controls to view **Div Style**:



3. Select the div style you want.
4. With your div added to the editor, type whatever text and use the regular editor controls to insert hyperlinks and other formatting.
5. Then, select the </> **Code View** button in the editor to switch to Code View.



6. Copy the HTML code for the div you created. For example, mine looks a bit like this:

```
<div class="alert alert-success">
  <p><strong>Stay informed</strong>
    <br>Read our latest <a href="https://support.knowledgeowl.com/help/release-notes">release notes</a>!</
</div>
```

Step 2: Add to your homepage

Congratulations, you now have a fully-formed div in HTML format! Now we'll add this into the homepage itself:

1. Go to **Settings > Style**.
2. Below the preview pane, be sure **Custom HTML** is selected.
3. In the Custom HTML dropdown, select **Homepage**.
4. This page is going to look a bit different depending on how you've customized your knowledge base, so you may need to play with positioning a bit to get the look you want.
5. For our standard layout, most often we see people put an announcement banner below the search bar and above the category panels, so that's what we'll do in this example.
6. To add the banner here, look for the `<div class="hg-article-body>` .
7. Add a new line between the hg-article-body div and the icon-cats template (or the homepage body template if that comes first in your Homepage HTML).
8. Paste your HTML onto that line.
9. So the Custom HTML should now look a little like this, with the new div at rows 7-10 (though your div is probably a bit different!):

```
<div class="ko-homepage-top">
  <h1 class="hg-article-title xcolor">[homepage("title")]</h1>
  [template("large-search")]
</div>
<div class="hg-article">
  <div class="hg-article-body">
    <div class="alert alert-success">
      <p><strong>Stay informed</strong>
        <br>Read our latest <a href="https://support.knowledgeowl.com/help/release-notes">release notes</
    </div>
    <div>[template("icon-cats,max=8,col=4,desc=0")]</div>
    <div>[homepage("body")]</div>
    <div class="homepage-widgets row">
      <div class="col-md-4 col-sm-6"><h3></h3>[template("pop-articles")]</div>
      <div class="col-md-4 col-sm-6"><h3></h3>[template("new-articles")]</div>
      <div class="col-md-4 col-sm-6"><h3></h3>[template("up-articles")]</div>
    </div>
  </div>
</div>
```

10. You can **Preview** your changes to be sure they look good. If you're comfortable with HTML, you can make tweaks here, or head back to the article editor to re-create your div.
11. Once you like the look of it, be sure to **Save** your changes.

Alternatives

If you have some HTML skills, you can also design your own div rather than using the default styles of the call-outs. Create a div and specify a background color, padding, etc. You can include a graphic or icon, as well. So, for example, this code:

```
<div style="background-color: #a5edef; color: #7f0707; padding: 15px; margin-bottom: 20px; border: 1px solid transpa
   <img src="https://dyzz9obi78pm5.cloudfront.net/app/image/id/5e5d6e4c8e121c80424f245f/n/lightbulb-linus200px.pi
</div>
```

Produces this:



Read our latest COVID-19 Updates.



Formatting your div

For simplicity's sake, we used in-line styles in the HTML example here. You can always use Custom CSS and classes.

Add a custom icon and header link on your homepage

Last Modified on 07/10/2024 4:33 pm EDT

Do you want to add an icon with text to your homepage? This can be a great way to encourage people to jump to a particular category or resource or encourage awareness of specific issues or content.

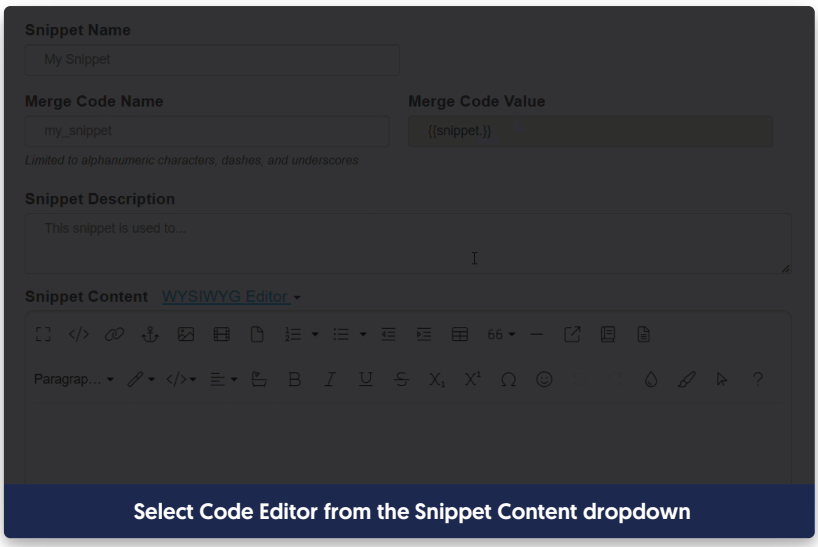
In this example, we walk through creating a snippet that contains a div with a Font Awesome icon, some text, and a link to content in your knowledge base. You can then add that snippet to your homepage to display it.

The end-result will look something like this:



Create the snippet

1. Go to **Library > Snippets**.
2. Select the **+ Create New Snippet** button.
3. Enter a **Name** for your snippet. The **Merge Code Name** is automatically calculated from the name.
4. Enter a **Snippet Description**. When anyone tries to insert a snippet using the editor, this description will be shown to them, so make it useful.
5. Select the **Snippet Content** dropdown and select **Code Editor**.



Select Code Editor from the Snippet Content dropdown

6. Copy the code below and paste it into the editor window:

```
<div class="homepage-callout-icon">
 <!--Adjust the URL below to point to the location you want to use -->
 <a href="https://support.knowledgeowl.com/help/breaking-news">
  <!--FontAwesome icon. Can be replaced with code for other FA icons -->
    <i class="fa fa-life-ring" aria-hidden="true"></i>
  <!--Text you want displayed below the icon-->
  <div>Breaking News!</div>
 </a>
</div>
<style>
 /* Style for icon */
 .homepage-callout-icon i {
  max-width: 240px;
  color: #A1222F;
  font-size: 48px;
 }
 /* Style for hyperlink text */
 .hg-minimalist-theme div.homepage-callout-icon a {
  color: #A1222F;
 }

 /* For next section, choose one alignment and remove/comment out the other two
 Left is used as default */

 /* Center*/
 /*.homepage-callout-icon {
  text-align:center;
  margin: 20px 0;
 }*/
 /* Left */
 .homepage-callout-icon {
  display: inline-block;
  text-align:center;
  margin: 20px 0;
 }
 /* Right */
 /* .homepage-callout-icon {
  display: inline-block;
  text-align:center;
  margin: 20px 0;
  float: right;
 }*/
</style>
```

7. **In row 3, change the** `href="https://support.knowledgeowl.com/help/breaking-news"` **to reference the URL you'd like this section to point to. If it's within your knowledge base, you only need to use the relative URL (/help/, /home/, or /docs/ with the URL of the specific article or category).**

8. **In row 5: we use a Font Awesome life preserver ring icon. To change this:**
    - **Head to the free Font Awesome icons.**
    - **Browse or search for an icon you'd like to use.**
    - **Select it and copy the HTML it displays for the icon.**
    - **Replace the HTML in row 5 with the HTML you copied from Font Awesome.**

9. **In row 7: Update the text you want displayed with the icon by editing this line.**

10. In row 14, change the color and size of the icon by adjusting the styles for `.homepage-callout-icon i`.
11. In row 19, change the color of the text font by changing the color for `.hg-minimalist-theme div.homepage-callout-icon a`.
12. Rows 22-42: Choose one of the **alignment options** and delete or comment out the other two. In our sample, we have used the Left alignment and commented out the other two. But you can change the commenting and delete the alignments you don't want.
13. *Optional:* If you'd like the linked icon and text to be visible only to certain reader groups, select those reader groups using the boxes in the **Restrict to Reader Groups** section.
14. When you're done making adjustments, select **Create**.

Here's a completed snippet using the "Center" align with a newspaper icon and text "Latest Releases!" and the colors changed to a dark blue:

```
<div class="homepage-callout-icon">
 <!--Adjust the URL below to point to the location you want to use -->
 <a href="https://support.knowledgeowl.com/docs/release-notes">
  <!--FontAwesome icon. Can be replaced with code for other FA icons -->
   <i class="fa-regular fa-newspaper"></i>
  <!--Text you want displayed below the icon-->
  <div>Latest Releases!</div>
 </a>
</div>
<style>
 /* Style for icon */
 .homepage-callout-icon i {
  max-width: 240px;
  color: #1d284f;
  font-size: 48px;
 }
 /* Style for hyperlink text */
 .hg-minimalist-theme div.homepage-callout-icon a {
  color: #1d284f;
 }
 /* Center*/
 .homepage-callout-icon {
  text-align:center;
  margin: 20px 0;
 }
</style>
```

Add the snippet to your homepage

1. Copy the **Merge Code Value** of the snippet.
2. Go to **Settings > Style.**
3. Below the preview pane, select **Custom HTML.**
4. Select **Homepage** from the dropdown.
5. Paste the merge code value where you'd like it to appear in your homepage. This may take some trial and error.

- To place it below the search bar but above the category icons, enter it on a new line between the hg-article-body div and the div with the icon-cats template in it, for example, here it is in row 7:

```
<div class="ko-homepage-top">
   <h1 class="hg-article-title xcolor">[homepage("title")]</h1>

</div>
<div class="hg-article">
   <div class="hg-article-body">

      <div></div>
      <div>[homepage("body")]</div>
```

Sample of how that code displays in the live knowledge base

- To place it between the title and the search bar, enter it on a new line between the h1 with the homepage title merge code and the large-search template, for example, here it is in row 3:

```
<div class="ko-homepage-top">
   <h1 class="hg-article-title xcolor">[homepage("title")]</h1>


</div>
<div class="hg-article">
   <div class="hg-article-body">
```

Sample of how that code displays in the live knowledge base

6. **Save** your changes.

Access the theme builder

Last Modified on 08/28/2024 3:06 pm EDT

Our theme builder (accessible in **Settings > Style**) has lots of tools and options to customize the look and feel of your knowledge base. You can easily customize your colors, fonts, logo, theme, and layout without needing to know HTML or CSS.

Our theme builder previews changes as you go so you don't need to save to see what that new font would look like. The preview allows you to toggle between the Homepage view, an Article view, the Contact Form view, and the Login Page view. You can also simulate viewing the site from a desktop/laptop, tablet, or phone to make sure your theme looks great on all size devices.

Authors also have access to Custom CSS, Custom HTML, and Custom Head at the bottom of the theme builder.

Choose your colors

Last Modified on 05/29/2024 5:28 pm EDT

Our theme designer allows you to customize your knowledge base colors. There are four main ways you can change your colors:

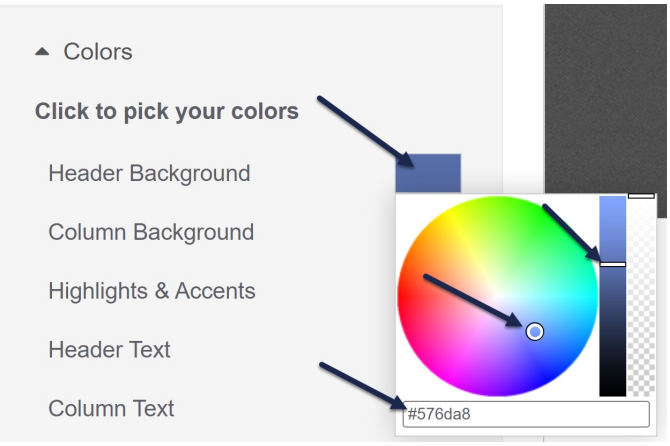
1. If you know the **hex codes** for the colors you'd like to use, or you're comfortable picking a close-enough color on a color wheel, you can click the color swatch next to the knowledge base color area you'd like to change and add the color.
2. You can extract a list of colors from a **URL** like your company website.
3. You can extract colors from an **Image**.
4. You can use one of our pre-built **Palettes** and iterate from that.

Each option is described in more detail below. See Color picker: Which colors control which parts of my theme? for more info on what each color swatch area controls.

Add individual colors directly

If you already have a list of hex codes you'd like to use from a brand or style guide, or you'd like to randomly pick colors from a color wheel:

1. Go to **Settings > Style**.
2. Be sure the **Colors** section is expanded.
3. Click the color swatch next to the color area you'd like to edit.
4. This will open a small pop-up with a color wheel and a hex code text box.



   - If you know the hex code, you can type or paste it into the box.
   - If you want to select from the color wheel, click in the wheel to select a general color. If you need

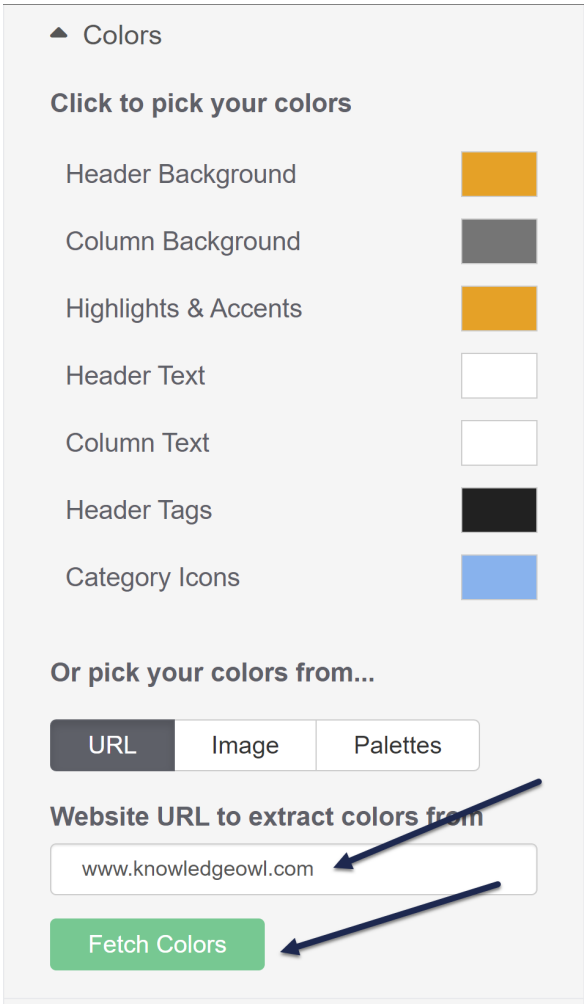
to change the darkness of that color, click in the color column immediately to the right of the wheel to adjust it.

5. Once you've added the hex code or made your color wheel selections, click anywhere outside of the pop-up to close it and see your changes in the Preview Pane.

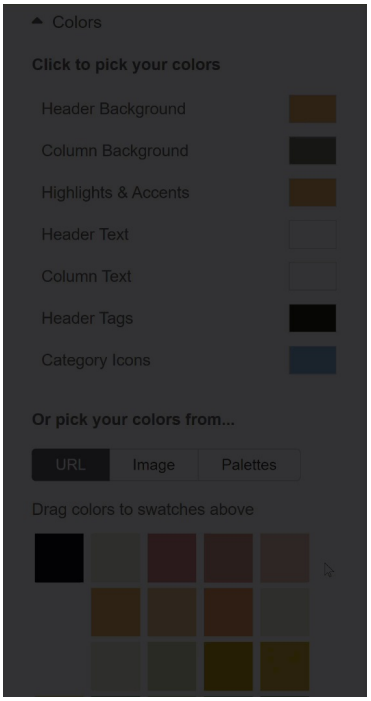
Extract colors from a URL

If you'd like to pull in colors automatically from a website (like your company website, for example):

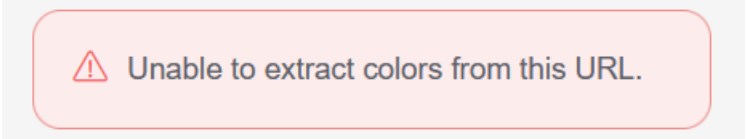
1. Go to **Settings > Style**.
2. Be sure the **Colors** section is expanded.
3. Select the **URL** option from the **Or pick your colors from...**section if it isn't already selected.
4. Add the URL you'd like to extract colors from in the **Website URL to extract colors from** box.
5. Select the **Fetch Colors** button.



6. If we're able to extract colors from that URL, you'll see a variety of color swatches displayed where the URL was. Drag those colors into the color area swatches above to update the theme's colors. The Preview Pane should automatically update as you make color changes.



- If we aren't able to extract colors from that URL, you'll see a message letting you know of the failure.

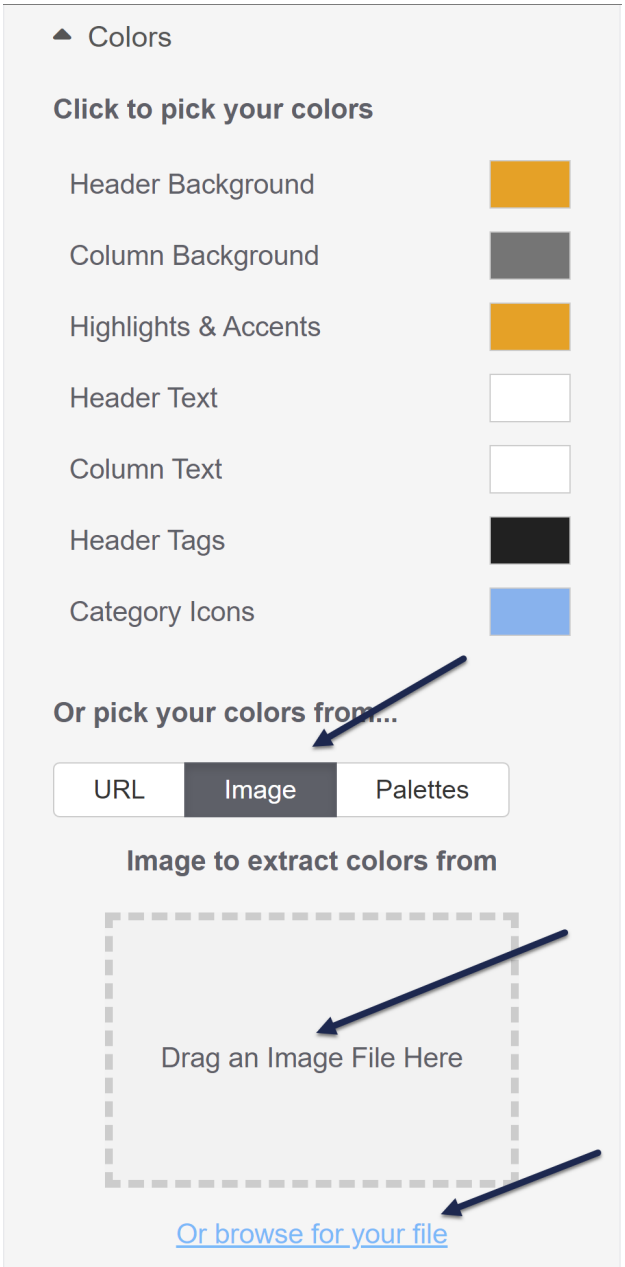


7. Once you have your colors set the way you'd like, be sure to **Save** your changes!

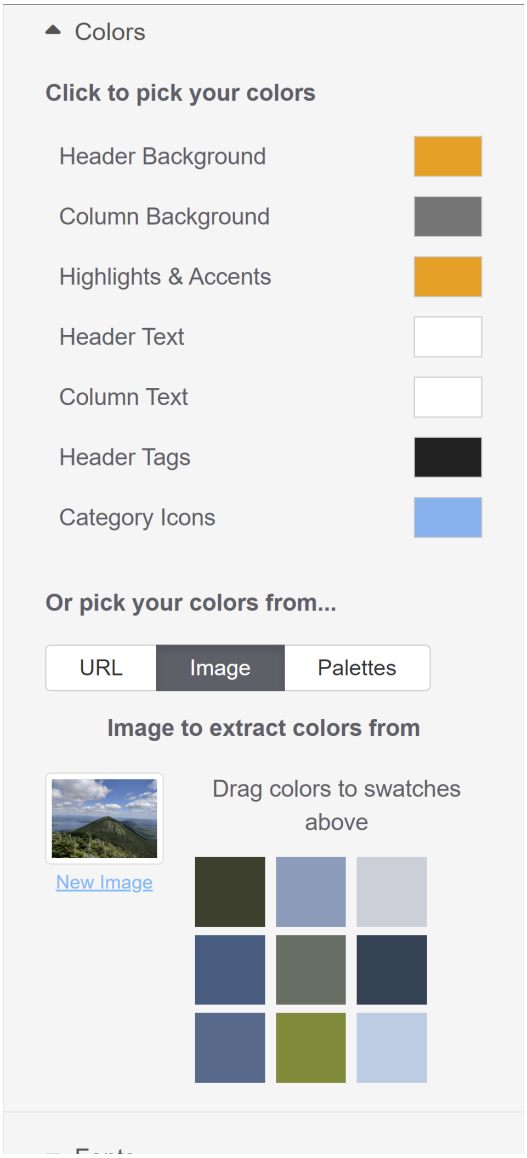
Extract colors from an image

If you'd like to pull in colors automatically from an image (like a banner image, photograph, or picture of a color palette):

1. Go to **Settings > Style**.
2. Be sure the **Colors** section is expanded.
3. Select the **Image** option from the **Or pick your colors from...**section.
4. You can either drag the image file into the **Drag an Image File Here** section, or select the **Or browse for your file** link to open a File Explorer browse window to locate the file you'd like to upload.



5. **Once you've added your images, a thumbnail of the image will display along with the colors extracted from it. Drag those colors into the color area swatches above to update the theme's colors. The Preview Pane should automatically update as you make color changes.**



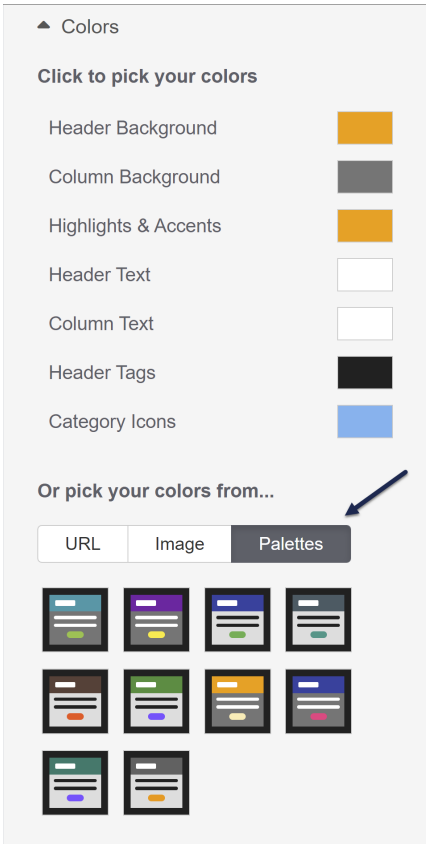
- If you need to change the uploaded image to get a different set of swatches, select the **New Image** option located under the image thumbnail to start the process over again.

6. Once you have your colors set the way you'd like, be sure to **Save** your changes!

Use a pre-built color palette

If you don't have a set color palette you'd like to start with, or you just want to test out the functionality, you can choose from 10 pre-built palettes. To do so:

1. Go to **Settings > Style**.
2. Be sure the **Colors** section is expanded.
3. Select the **Palettes** option from the **Or pick your colors from...**section.
4. Once selected, a handful of palettes will appear.
5. Select an individual palette to see the Preview Pane and the color areas update.



6. **Once you've found the palette you'd like to use, be sure to Save your changes.**

Color picker: Which colors control which parts of my theme?

Last Modified on 08/21/2024 12:00 pm EDT

Different options
The color picker options will look different depending on whether you're using our older themes or our latest theme. To figure out which description you need, go to **Settings > Style**. Look at the first option under **Colors**. If it says "Top navigation bar", use New theme. If it says "Header background", use Old theme.

New theme | Old theme

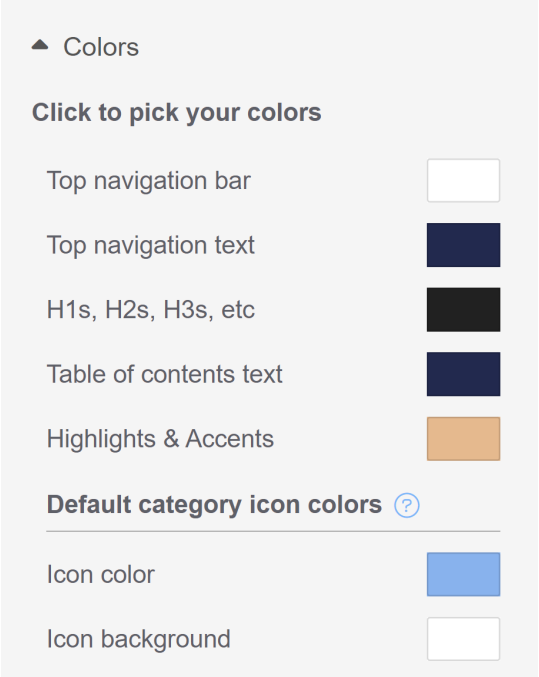
New theme

The **Click to pick your colors** section includes seven different color areas you can set:

- Top navigation bar
- Top navigation text
- H1s, H2s, H3s, etc.
- Table of contents text
- Highlights & Accents

Default category icon colors:

- Icon color
- Icon background



Refer to the sections below for more detailed descriptions of what each color setting does.

Limitations
If you have custom CSS, HTML, or snippets in your knowledge base, those customizations may override these general color area settings.

Top navigation bar

Top navigation bar changes the color background of the top navigation bar in your knowledge base.

Top navigation text

Top navigation text changes the color of:

- Any text in your top navigation
- Table of contents hamburger icon
- The text color of the buttons impacted by the Highlight & accents button color

H1s, H2s, H3s, etc.

H1s, H2s, H3s, etc. changes the colors of:

- The headers for the homepage article lists (New, Popular, etc.)
- All headings in articles: article title, any headings in the article body, and the Related Articles heading
- The "Search results for..." header on the Search Results page (* default theme includes CSS that overrides this setting)
- The header on the Contact Form once it's opened

Table of contents text

Table of contents text changes the color of the text in your table of contents for both articles and categories.

Highlights & accents

Highlights and accents are used throughout your knowledge base. Assuming there is no CSS to style them differently, changing this color will impact:

- **Icons** in the Table of contents
- **Hyperlinks** in article lists, related articles, category landing pages, search results, Contact Form results, article text (* default theme includes CSS that overrides this setting)
- **Breadcrumbs** displayed in articles (* default theme includes CSS that overrides this setting)
- **Article actions icons**: PDF, print, email, favorite (* default theme includes CSS that overrides this setting)
- Search results **breadcrumbs** and **article titles** (* default theme includes CSS that overrides this setting)
- Search bar text box and comments text box **border highlighting** on-focus
- All **buttons** except Search button (login submit, Contact Form submit, etc.)

Icon color

Icon color changes the default color that the Choose a Font Awesome icon pop-up uses when you add a new category icon. It will not change any of your existing category icon colors. Once a category icon has been saved with a specific color, you'll need to edit that category to change the color.

Icon background

When category icons are displayed, they're displayed within a small box. We set that default icon background color to white. The Icon background changes the default icon background color that the Choose a Font Awesome icon pop-up uses when you add a new category icon. It will not change any of your existing category icon background colors. Once a category icon has been saved with a specific background color, you'll need to edit that category to change the color.

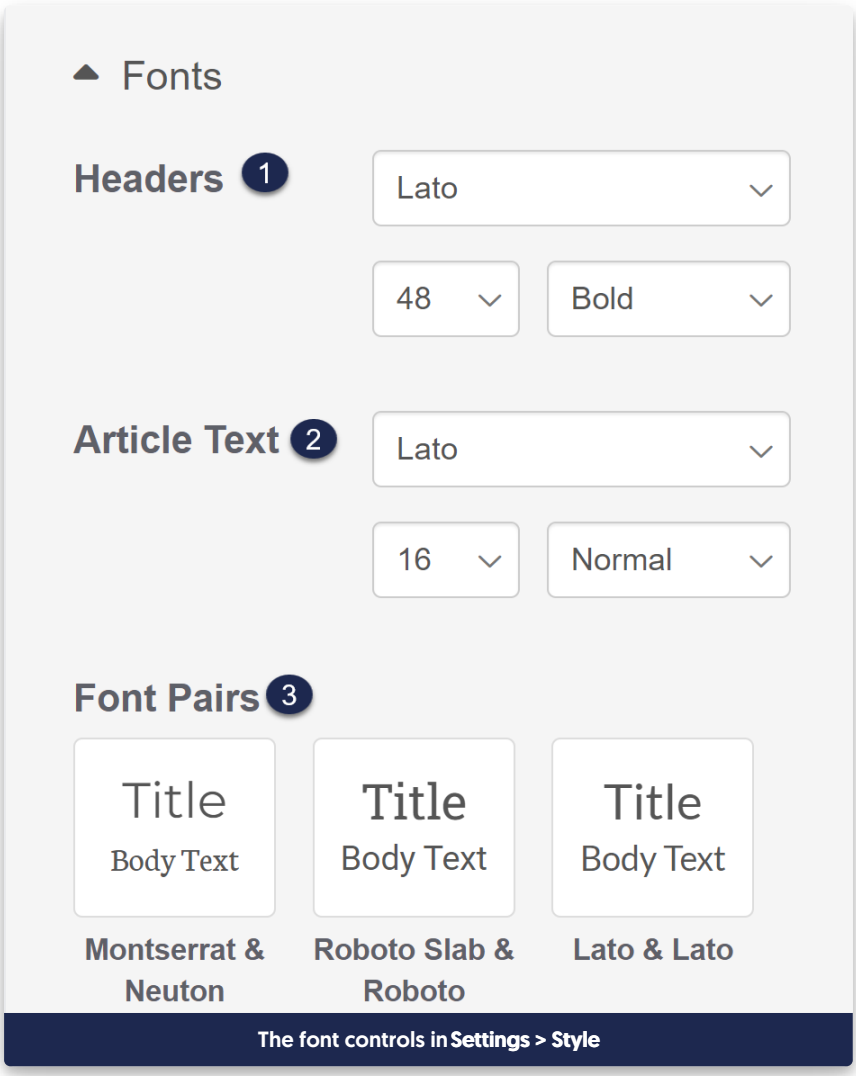
Choose your font

Last Modified on 05/29/2024 5:27 pm EDT

The themer comes with a number of fonts built into it. You can also choose to use your own Custom fonts.

All built-in fonts are hosted directly by KnowledgeOwl.

If you're using any of the built-in fonts, you can select them using the **Fonts** controls in the lefthand panel of **Settings > Style**.



The font controls in **Settings > Style**

As you make changes to the font controls, the Preview pane should automatically update so you can get a feel for how the fonts look.

The available Fonts controls are:

1. **Headers:** Sets the font family, font size, and font weight for all header text across your knowledge base. Default is Lato 48 Bold. Changing this font will impact:
    - The homepage text/header
    - Headers used in category panels on your homepage or subcategory panels displayed in category landing pages
    - The article list headers
    - Top navigation links
    - Table of contents links
    - Text in the footer
    - The title header of a category
    - The description of a category (on a category landing page, etc.)
    - The title header of an article
    - Any headers or subheaders used within articles
    - The Related Articles section
    - Article ratings
    - Most of the text in the knowledge base Contact Form
2. **Article Text:** Sets the font family, font size, and font weight for all article text in your knowledge base. The default is Lato 16 Normal. Changing this font will impact:
    - Any text in the body of an article that is not a header
    - The hyperlinks in various article lists (like Popular, New, Updated)
3. **Font Pairs:** If you don't have brand requirements for using specific fonts and you just want to explore options, you can test out some pre-packaged Font Pairs.
    - Selecting one of these pairs will automatically update the **Headers** and **Article Text** controls with the font pairs.
4. Once you've made changes, be sure to **Save** them!

We offer the following fonts:

- Amati SC
- Arial
- Courier New
- Cutive
- Georgia
- Great Vibes
- Holtwood One SC
- Inconsolata

- Inter
- Lato
- Lobster
- Merriweather
- Montserrat
- Neuton
- Noto Sans JP
- Open Sans
- Oswald
- Pacifico
- Patrick Hand
- Poiret One
- Poppins
- Quattrocento
- Raleway
- Roboto
- Roboto Condensed
- Roboto Mono
- Roboto Slab
- Rokkitt
- Source Sans Pro
- Special Elite
- Tahoma
- Times New Roman
- Trebuchet MS
- Verdana

And these font pairs:

- Roboto & Roboto Condensed
- Open Sans & Noto Sans JP
- Montserrat & Poppins
- Tahoma & Trebuchet MS
- Roboto Slab & Roboto
- Lato & Lato
- Merriweather & Open Sans
- Raleway & Inter
- Neuton & Poppins

Custom fonts

Last Modified on 05/29/2024 5:28 pm EDT

Our knowledge base theme builder allows you to choose from a variety of fonts, sizes, and weights. We even have pre-built font pairs picked by a designer.

You can also specify a custom font, either as a web font available via URL, or 1+ custom font files you've downloaded.

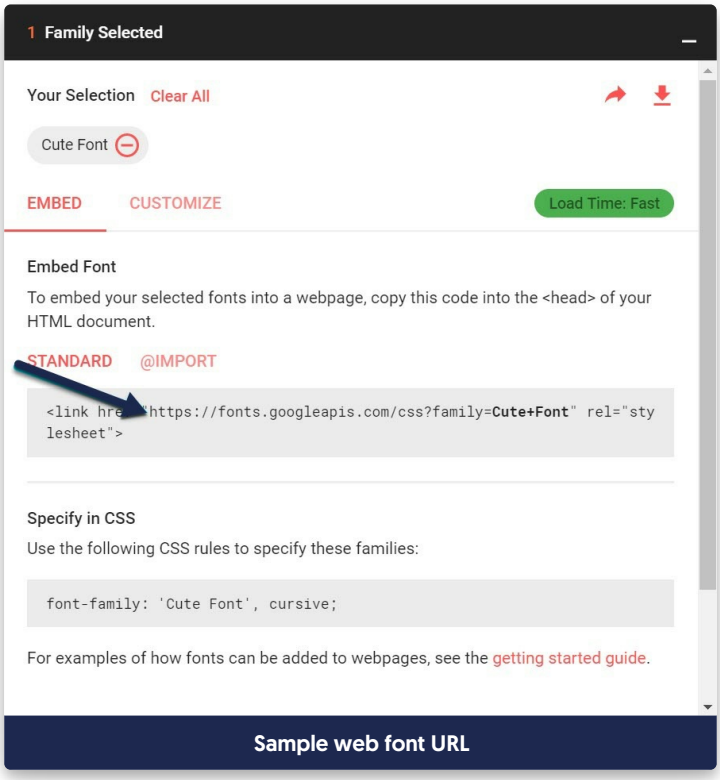
These custom fonts can be applied via Custom CSS to very specific font cases, or you can apply them to all Article Text or Header Text using our built-in Custom Web Font options.

Preliminary steps

Regardless of whether you want to apply your custom font to specific types of text or to all Article/Header text, you'll need to have a URL for that font. You can either reference a public URL for a web font, or you can upload a font file you already have and reference the File Library URL for it. Here are sample steps for each.

Get a web font URL

Most web fonts will provide you a URL to reference to include the font on your site:



If you're using a web font URL, follow the Adding custom fonts via external URL for use in all Article text or Headers instructions.

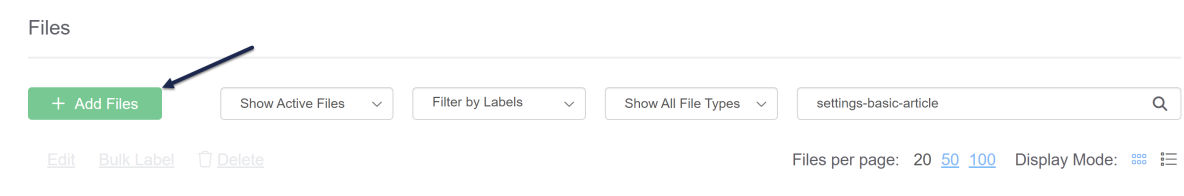
Custom font files

What if your font isn't referenced via URL, but through specific files? For example:

- Your company has its own set of official fonts
- You downloaded font files from a web font
- You paid for a proprietary font

In these scenarios, you'll need to add the font files to your File Library. To do so:

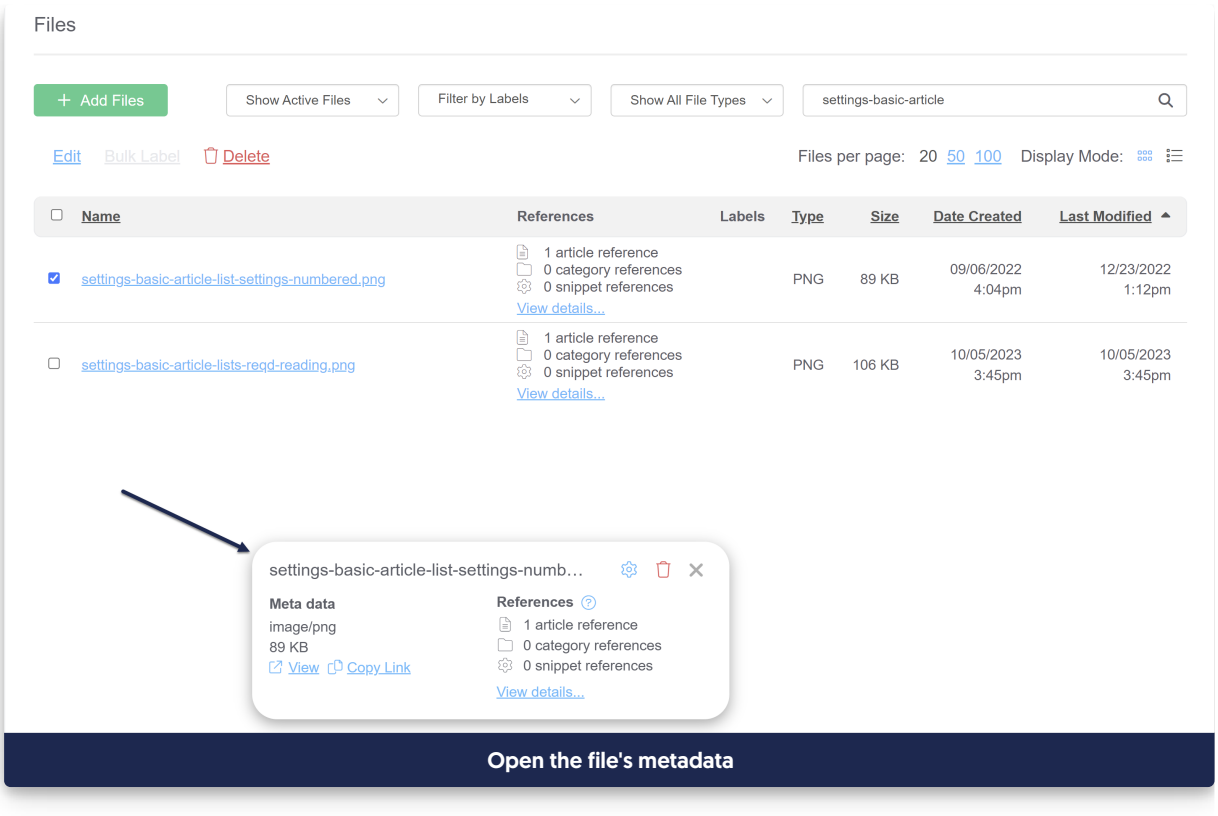
1. Go to **Library > Files.**
2. Select the **+ Add Files** button.



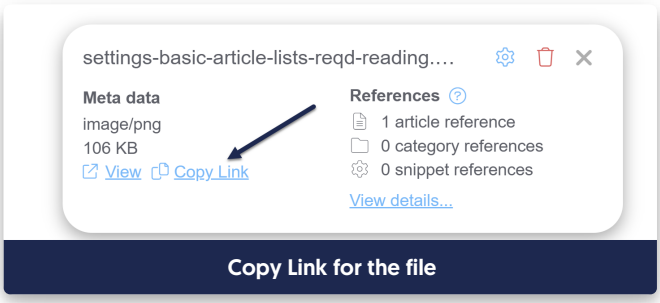
3. Either drag and drop font files in, or browse to them, select, and click Open to add them to the Upload Files pane.
4. Once you've added all the font files you need, click the **Upload Files...** button.



5. You will need the URL for each font file you uploaded to reference it later on. To get the URL, click on the file to open the file's metadata at the bottom of the library.



6. Then click the **Copy Link** option to copy the file's URL to your clipboard.

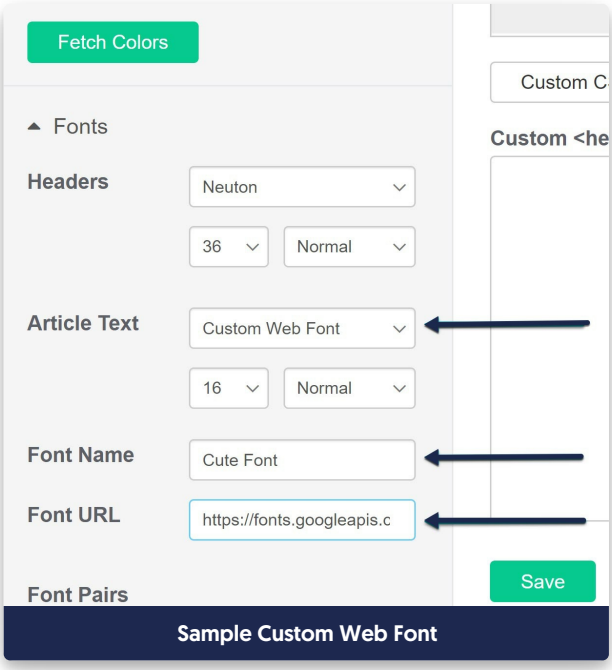


If you're using a font file uploaded to KnowledgeOwl, follow the Adding custom fonts from KnowledgeOwl for use in all Article text or Headers instructions.

Adding custom fonts via external URL for use in all Article text or Headers

1. Go to **Settings > Style**.
2. In the **Fonts** section on the left, select which font classes in your knowledge base you want this custom font applied to: Headers, Article Text, or both. For this example, we'll apply it to Article Text.
3. For the font class you want to update, select **Custom Web Font** from the dropdown (it is the last menu option).
4. Set the size and weight for the font.
5. Add the **Font Name**. This should match the font-family name in the URL or CSS for the custom font (Cute Font, in this example).

6. For the **Font URL:** if you are using a URL from somewhere outside of KnowledgeOwl (such as Google Fonts), paste the URL directly:



7. *Optional:* To set one of these fonts as the default for the search bar, comments placeholder, and other non-article and non-header text, follow the instructions below to Use custom font as default font for placeholders.

8. You can **Preview** your changes to see how they look.

9. Be sure to **Save** once you've finished making changes.

Adding custom fonts from KnowledgeOwl for use in all Article text or Headers

1. Go to **Settings > Style**.

2. In the **Fonts** section on the left, select which font classes in your knowledge base you want this custom font applied to: Headers, Article Text, or both. For this example, we'll apply it to Article Text.

3. For the font class you want to update, select **Custom Web Font** from the dropdown (it is the last menu option).

4. Set the size and weight for the font.

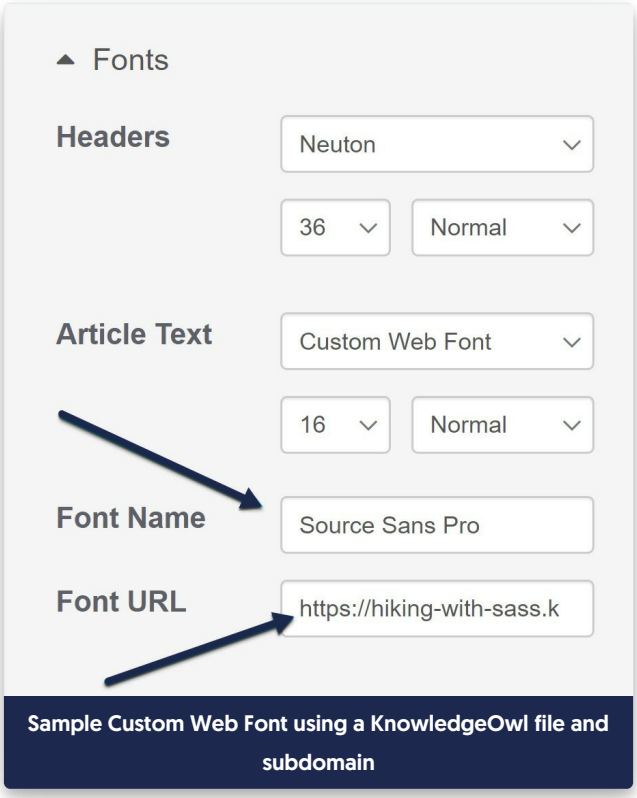
5. Add the **Font Name**. This should match the font-family name in the URL or CSS for the custom font (Cute Font, in this example).

6. For the **Font URL:** If you are using a URL for a file you've uploaded to KnowledgeOwl, you will need to edit the URL to include your knowledge base's URL. (Files stored in KnowledgeOwl are stored on Cloudfront, but using a Cloudfront URL will prevent your font from loading properly.) The URL you copied for your file likely looks something like this:

```
https://dyzz9obi78pm5.cloudfront.net/app/image/id/5d3f365dec161c2860e78829/n/sourcesanspro-regular.ttf
```

Replace the `https://whatever.cloudfront.net` **portion of the URL with your knowledge base's subdomain and domain. For example:**

```
https://support.knowledgeowl.com/app/image/id/5d3f365dec161c2860e78829/n/sourcesanspro-regular.ttf
```



Sample Custom Web Font using a KnowledgeOwl file and subdomain

If you've uploaded multiple files (say, a Regular file, Bold file, etc.), reference the URL for the one that is the default weight you want.

7. **Under the preview pane, be sure Custom CSS is selected.**
8. **Copy the CSS below and paste it into the top of your Custom CSS.**

```
@font-face {
font-family: MyFontFamily;
src: url(/app/image/id/626ac8eb4c03de5903752be1/n/myfontregular.otf);
}
```

9. **Replace MyFontFamily in row 2 with the Font Name you used before.**
10. **Replace the src url in row 3 with the URL for the font. If you're using a file stored in the File library, remove the portion before /app/image/id. So if the file URL looks like this:**

```
https://dyzz9obi78pm5.cloudfront.net/app/image/id/5d3f365dec161c2860e78829/n/sourcesanspro-regular.otf
```

I would use this URL:

```
/app/image/id/5d3f365dec161c2860e78829/n/sourcesanspro-regular.otf
```

11. *Optional:* To set one of these fonts as the default for the search bar, comments placeholder, and other non-article and non-header text, follow the instructions below to Use custom font as default font for placeholders.
12. You can **Preview** your changes to see how they look.
13. Be sure to **Save** once you've finished making changes.

Use custom font as default font for placeholders

If you'd also like this font family to be used as the default font for things like the search bar placeholder, comments placeholder, and more:

1. In **Settings > Style**, under the preview pane, be sure **Custom CSS** is selected.
2. Copy the CSS below and paste it into the top of your Custom CSS. (If you already added the @font-face rule, just copy the second portion)

```
@font-face {
font-family: MyFontFamily;
src: url(/app/image/id/626ac8eb4c03de5903752be1/n/myfontregular.otf);
}

.hg-site .hg-project-name, body, .form-control {
font-family: MyFontFamily, sans-serif;
}
```

3. Replace MyFontFamily in rows 2 and 7 with the Font Name you used before.
4. Replace the src url in row 3 with the URL for the font. If you're using a file stored in the File library, remove the portion before /app/image/id. So if the file URL looks like this:

```
https://dyzz9obi78pm5.cloudfront.net/app/image/id/5d3f365dec161c2860e78829/n/sourcesanspro-regular.otf
```

I would use this URL:

```
/app/image/id/5d3f365dec161c2860e78829/n/sourcesanspro-regular.otf
```

5. You can **Preview** your changes to see how they look.
6. Be sure to **Save** once you've finished making changes.

See our Best Practices section below for additional recommendations.

Applying custom web fonts via custom CSS

If you'd like to apply your custom font via custom CSS--to apply only in certain cases, rather than all Article text or all Headers--you'll add the custom font entirely via Custom CSS rather than the Fonts option. To do so:

1. Go to **Settings > Style**.
2. Below the preview pane, be sure **Custom CSS** is selected.
3. Copy the CSS below and paste it into the top of your Custom CSS:

```
@font-face {
font-family: MyFontFamily;
src: url(/app/image/id/626ac8eb4c03de5903752be1/n/myfontregular.otf);
}

.documentation-article h1, .cke_editable h1,
.documentation-article h2, .cke_editable h2,
.documentation-article h3, .cke_editable h3,
.documentation-article h4, .cke_editable h4,
.documentation-article h5, .cke_editable h5,
.documentation-article h6, .cke_editable h6,
.hg-article-body, .hg-article-body p, .cke_editable, .cke_editable p,
.hg-site .hg-project-name, body, .form-control {
font-family: MyFontFamily, sans-serif;
}
```

4. Replace MyFontFamily in rows 2 and 14 with the name of the font you're using.
5. Replace the src url in row 3 with the URL for the font. If you're using a file stored in the File Library, remove the portion before /app/image/id. So if the file URL looks like this:

   ```
   https://dyzz9obi78pm5.cloudfront.net/app/image/id/5d3f365dec161c2860e78829/n/sourcesanspro-regular.otf
   ```

   I would use this URL:

   ```
   /app/image/id/5d3f365dec161c2860e78829/n/sourcesanspro-regular.otf
   ```

6. Adjust the CSS block to include only the areas you'd like to target with the given font.
7. You can **Preview** your changes to see how they look.
8. Be sure to **Save** once you've finished making changes.

See our Best Practices (next section) for additional tips.

Best Practices

Over the years, we've set up a lot of custom fonts for customers. Here are some of the tricks we most recommend following.

Use @font-face rules rather than Custom head

Many tutorials on basic website layout will tell you to add custom fonts into the Custom <head>. We don't

recommend this in KnowledgeOwl because loading fonts this way does not load them into the Article Editor. If you use Custom <head>, what your content writers and editors will see will be a different font/display than what is displayed on your live knowledge base to your readers.

Test your PDFs and fix fonts that don't load

Some custom fonts **will not load** in PDFs. You can either leverage an online tool to encode your font in base64 or set PDFs to use a font provided in KnowledgeOwl. To set a different fallback default for PDFs, add something like this to your **Custom CSS** in **Settings > Style**:

```
.hg-pdf .hg-article-body,
.hg-pdf .hg-article-body p,
.hg-pdf .documentation-article h1 {
    font-family: sans-serif;
}
```

Customize font in form fields

Updating Article text using Custom Web Fonts will not automatically update the fonts in webforms like the Search bar, the Contact Form, etc. To update those to use the same font family, use this CSS in **Custom CSS** with the appropriate font-family and font style from your web font:

```
.form-control {font-family: 'Cute Font', sans-serif;}
```

Set custom font to global default

Updating Header and Article text using Custom Web Fonts will not automatically change the global default fonts (used for most of the placeholder text in the search and other forms). If you'd like to use a custom font as a **global default**, add the font-family to the body in Custom CSS, for example:

```
body {
    font-family: 'Cute Font', sans-serif;
}
```

Use relative URLs when loading fonts from file library

As mentioned above, some font files require the font URL and the website domain to be the same in order to work. To fix this, upload the font file to your KnowledgeOwl library and use a relative link when referencing it in @font-face, for example:

```
@font-face {
  font-family: Abingdon;
  src: url(/app/image/id/5cc205568e121c6a65ffb076/n/abingdon-regular.otf);
}
```

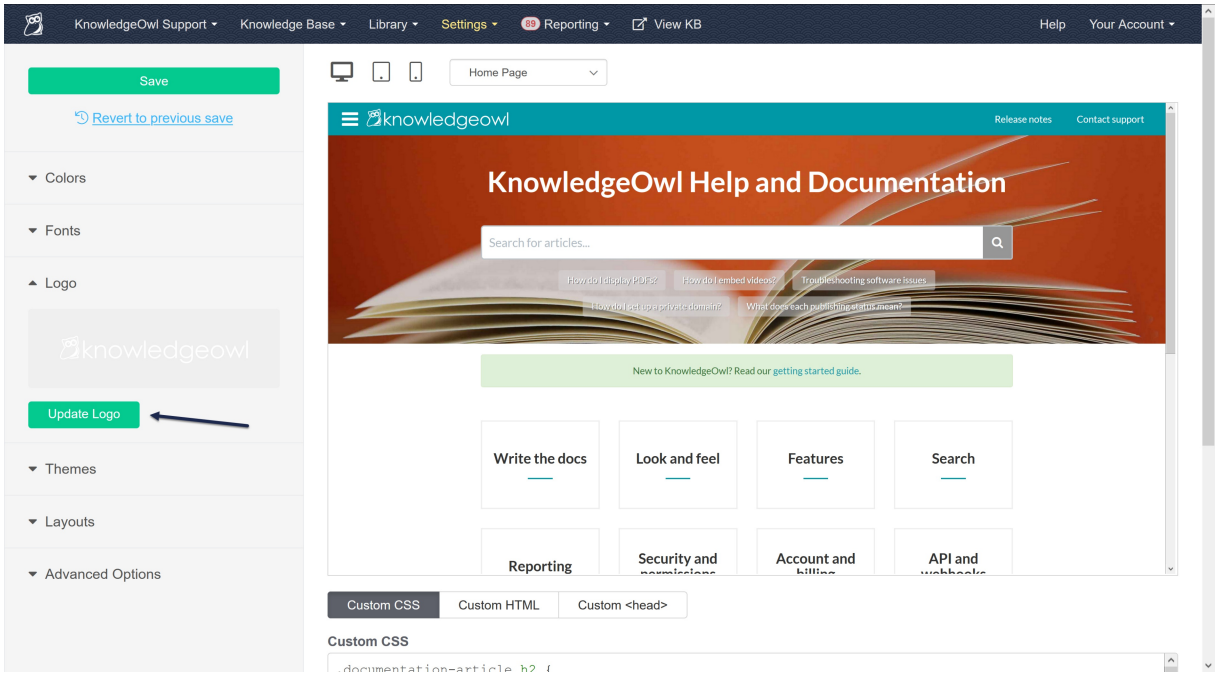
Choose your logo

Last Modified on 05/29/2024 5:28 pm EDT

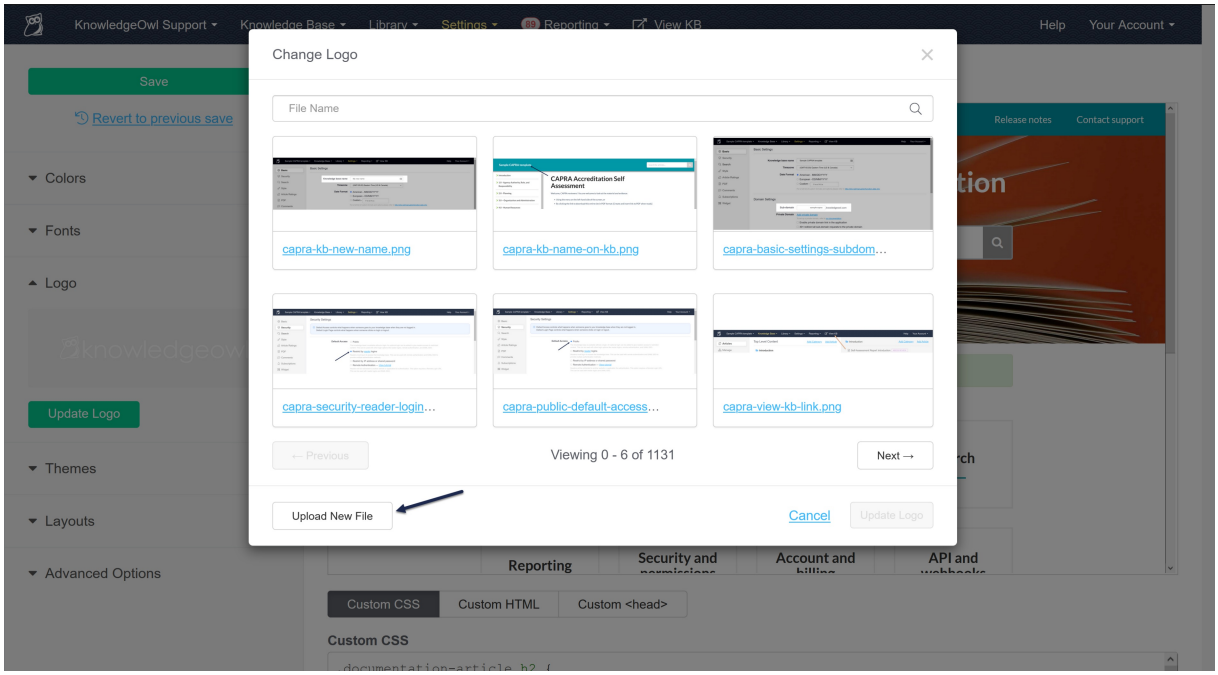
All of our theme templates include a space for a logo in the header of your knowledge base. We recommend using an image that is no taller than 60px and no wider than 300px, though you can use CSS overrides to resize larger images.

To set a logo or update it:

1. Go to **Settings > Style**.
2. In the **Logo** section, click the **Update Logo** button.

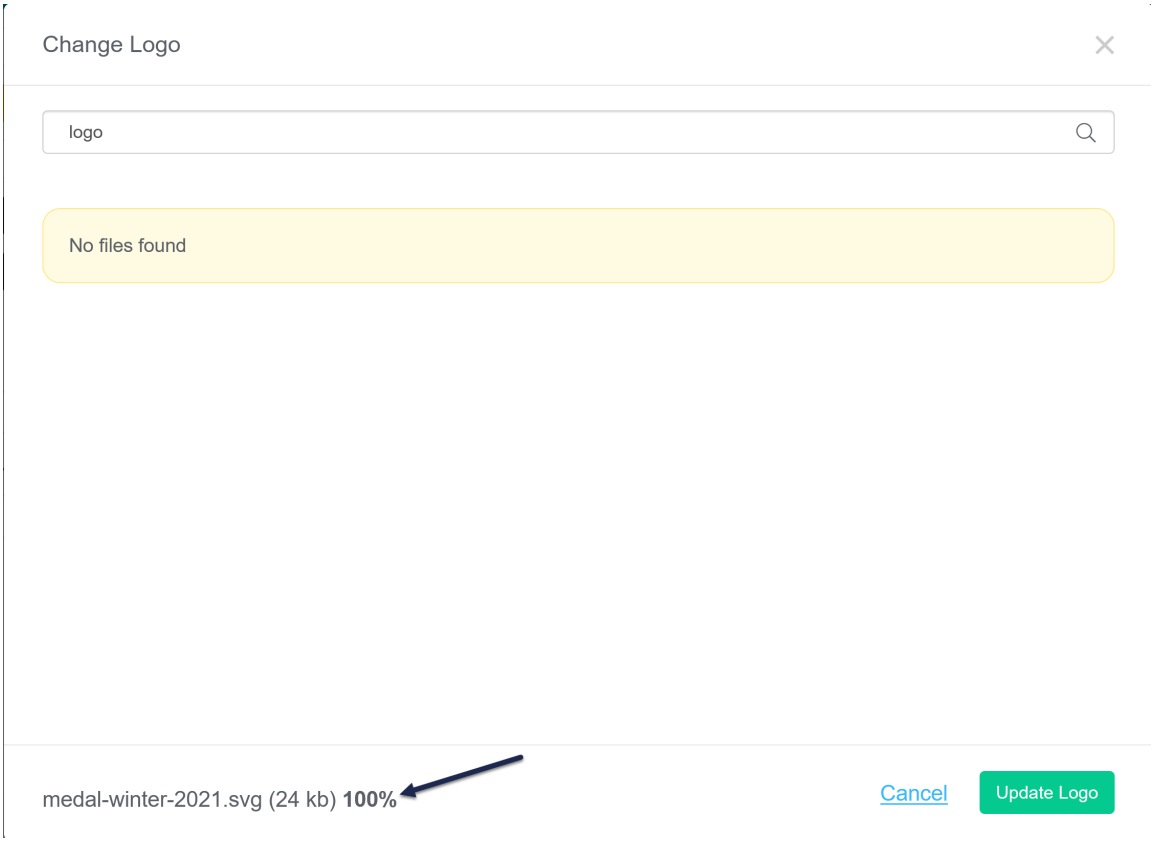


3. This will open a file selector window where you can choose the file you'd like to upload. To use an existing file in your File Library, click on the file (you can use the Search bar at the top to help locate it). To upload a new file, click the **Upload New File** button in the lower left:

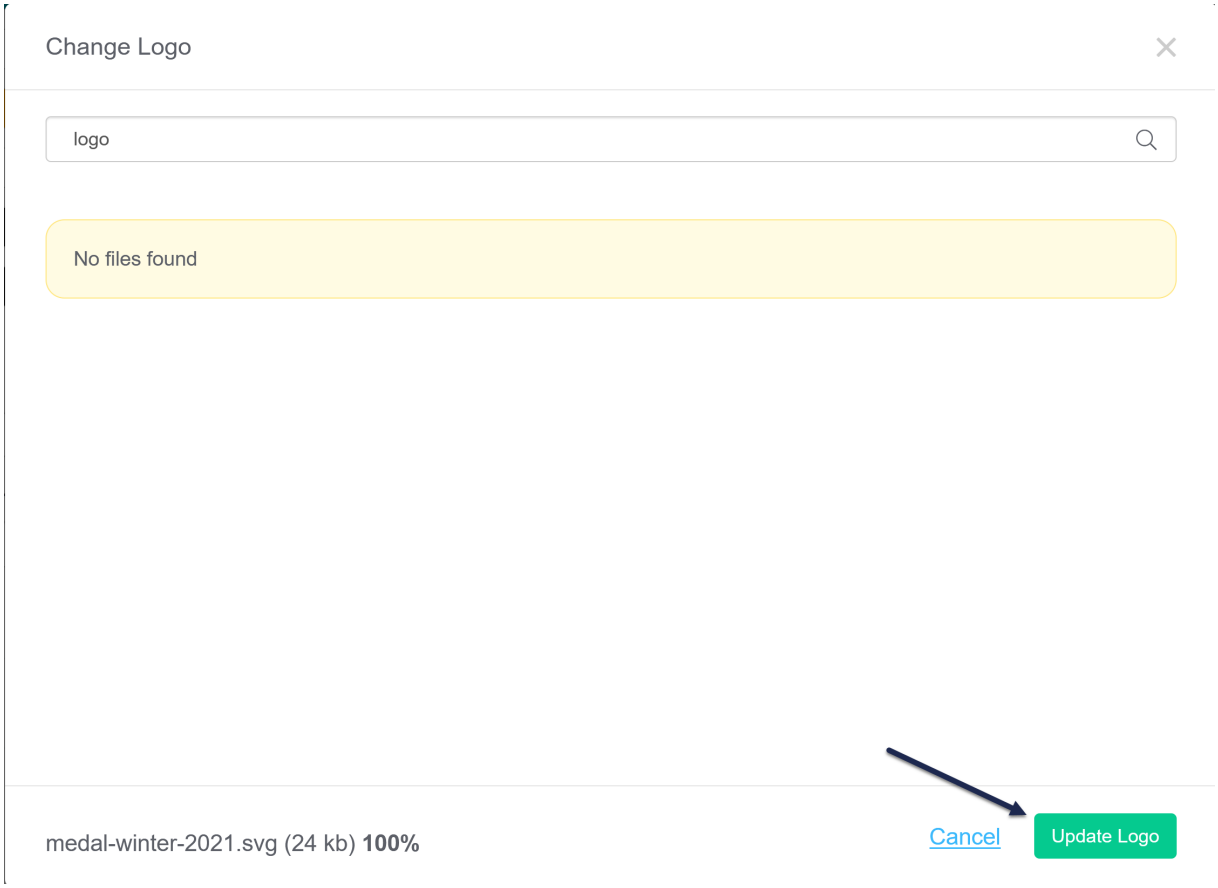


a. **Find the file you want to upload, select it, and click OK. This will begin the upload process.**

b. **In the Change Logo pop-up, you'll see the name of the file you selected to upload. When it's done uploading, you'll see a 100% after the file name. Once you see this, you can continue with the next step:**



4. **With your file selected (or uploaded), click the Update Logo button in the lower right to complete the logo update.**

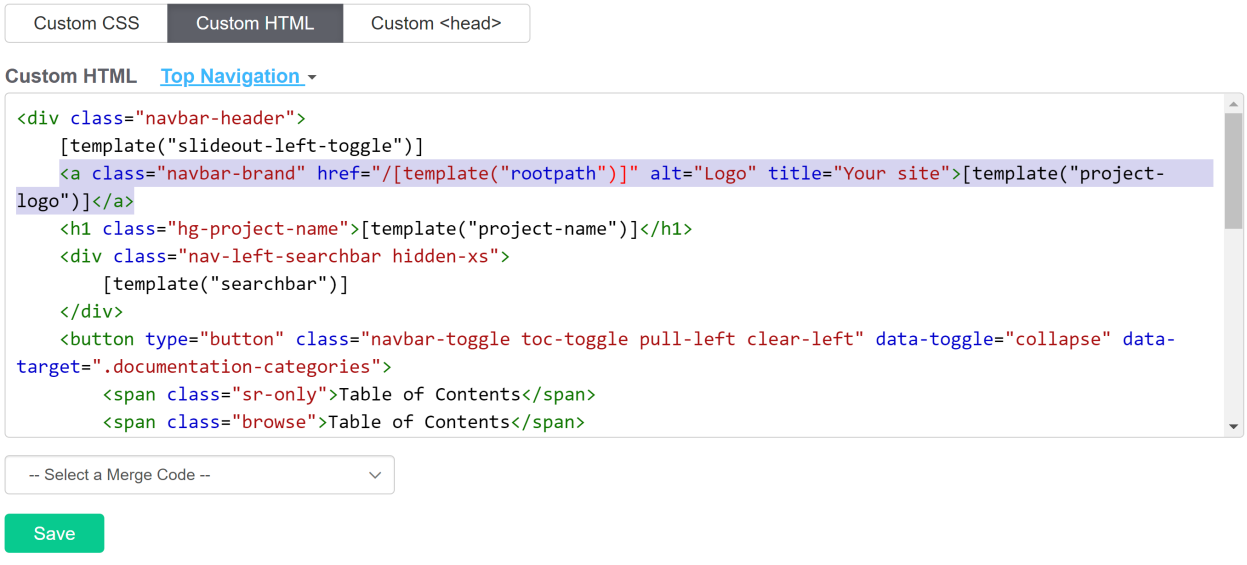


5. **If you are using the default HTML styles, after you upload a logo it will automatically appear in the header of your knowledge base.**

If you accidentally deleted the markup for the logo, you can go to Custom HTML > Top Navigation and add this HTML after the slideout-left-toggle template:

```
<a class="navbar-brand" href="/" alt="Logo" title="Your site">[template("project-logo")]</a>
```

This merge code will pull in the markup for the image automatically. Here's a sample of what that final product might look like:



Choose your theme

Last Modified on 08/21/2024 2:01 pm EDT

Only available to older knowledge bases
New knowledge bases created after 6 December 2023 don't have the option to select different themes or layouts; they use the Minimalist theme and Left two column layout.
If you have a new knowledge base that needs to use one of our older themes, please contact us to enable the older themes. (Note that switching to the older themes removes some options, like the Table of Contents control.)

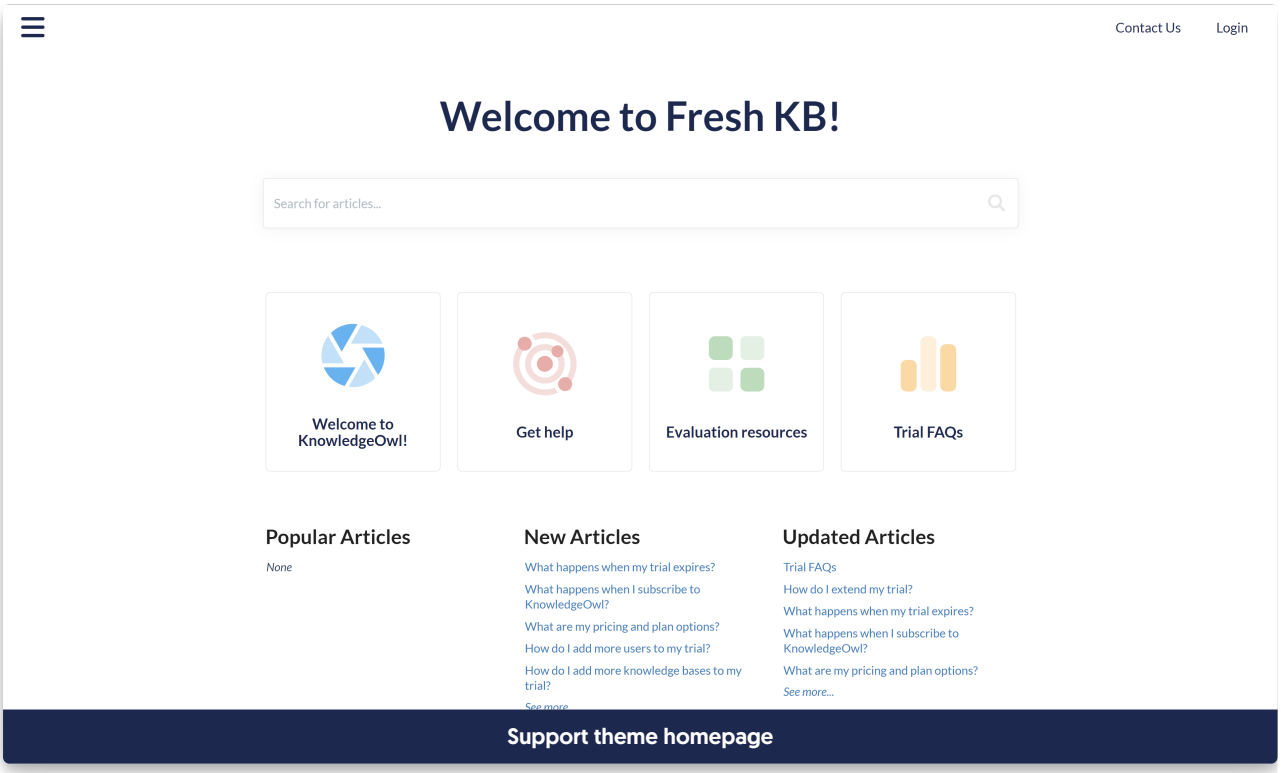
Your knowledge base theme dictates the overall layout of your knowledge base, including the top navigation, table of contents, search bar, and article layout.

You can choose from one of four themes on the **Settings** > **Style** page.

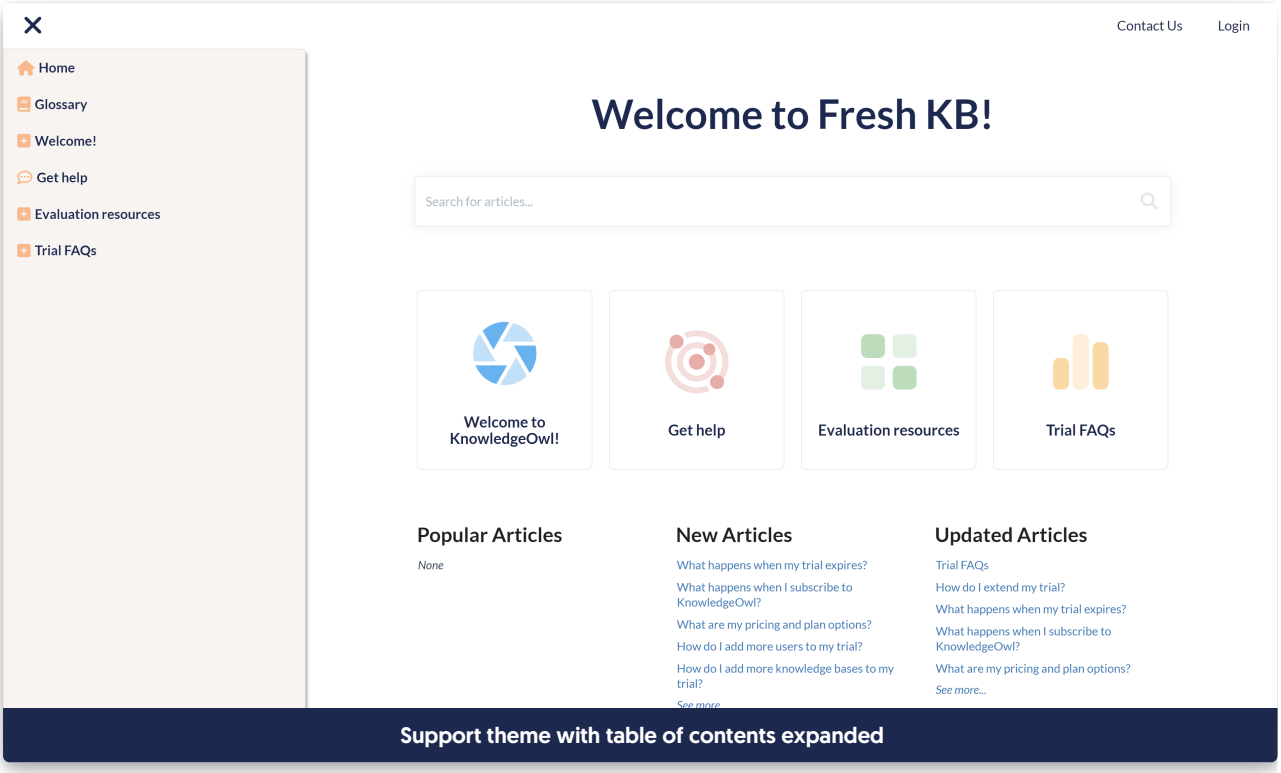
Each theme has a different layout and style associated with it:

Support

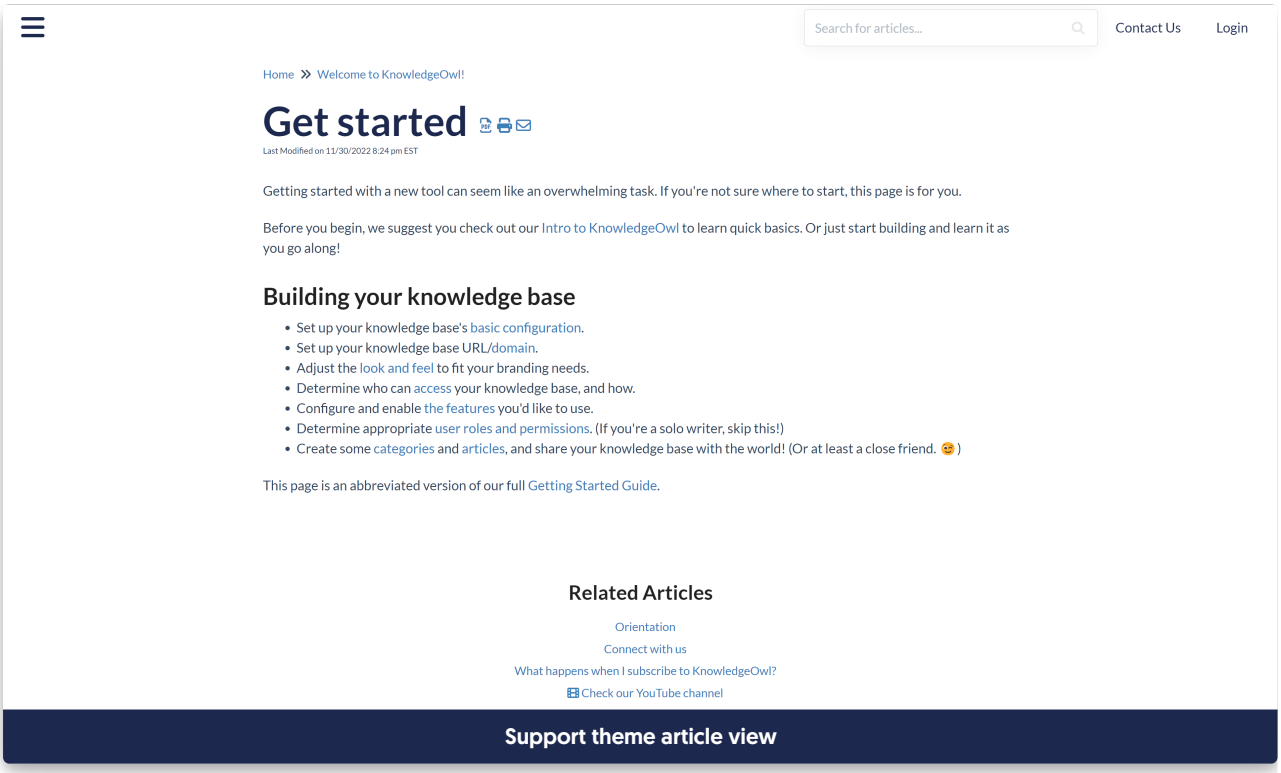
The Support theme is a theme built on top of the **Minimalist** theme. Loosely based on the theme we use here in our support knowledge base, you can achieve it using the **Minimalist** theme with **Two left columns** layout. We automatically copy this theme customization into all new-from-scratch knowledge bases, but if you'd like to try out adapting an existing knowledge base using the Custom CSS and other tweaks we use, see Use the new Support theme for full details!



Support theme homepage



Support theme with table of contents expanded

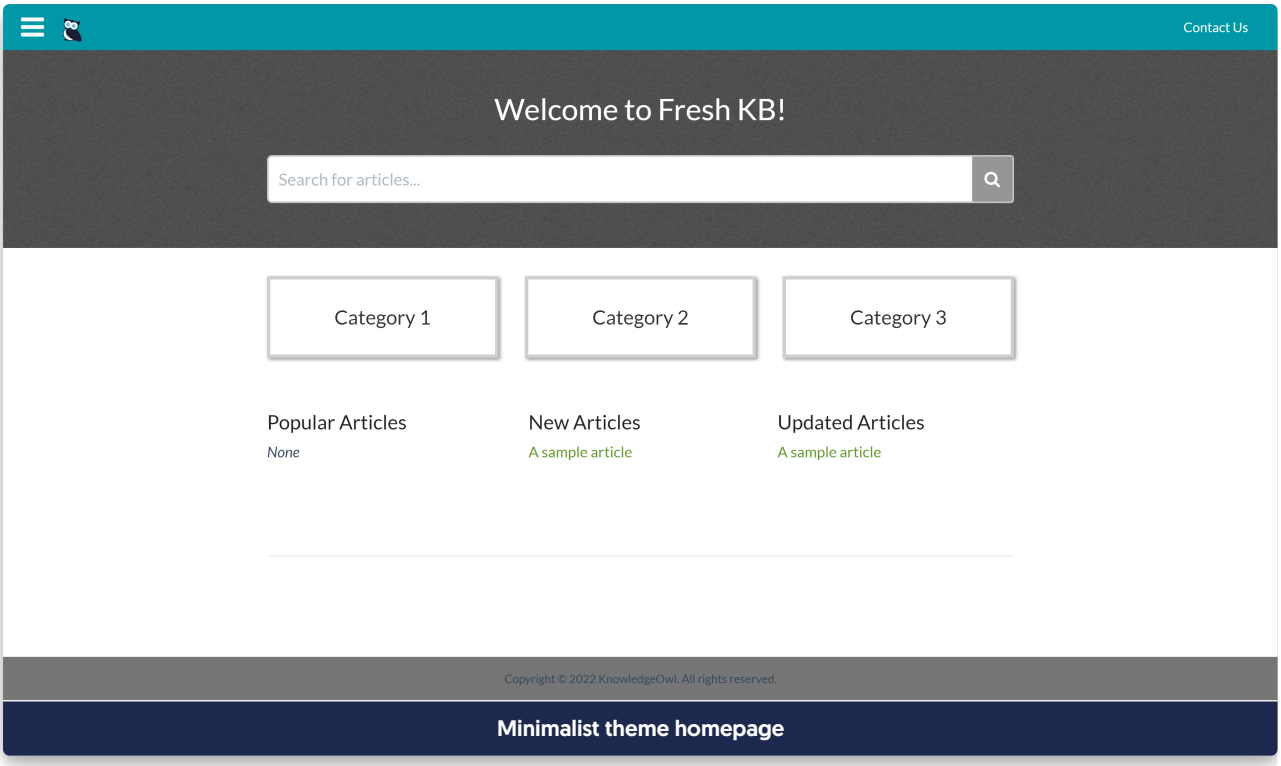


Minimalist

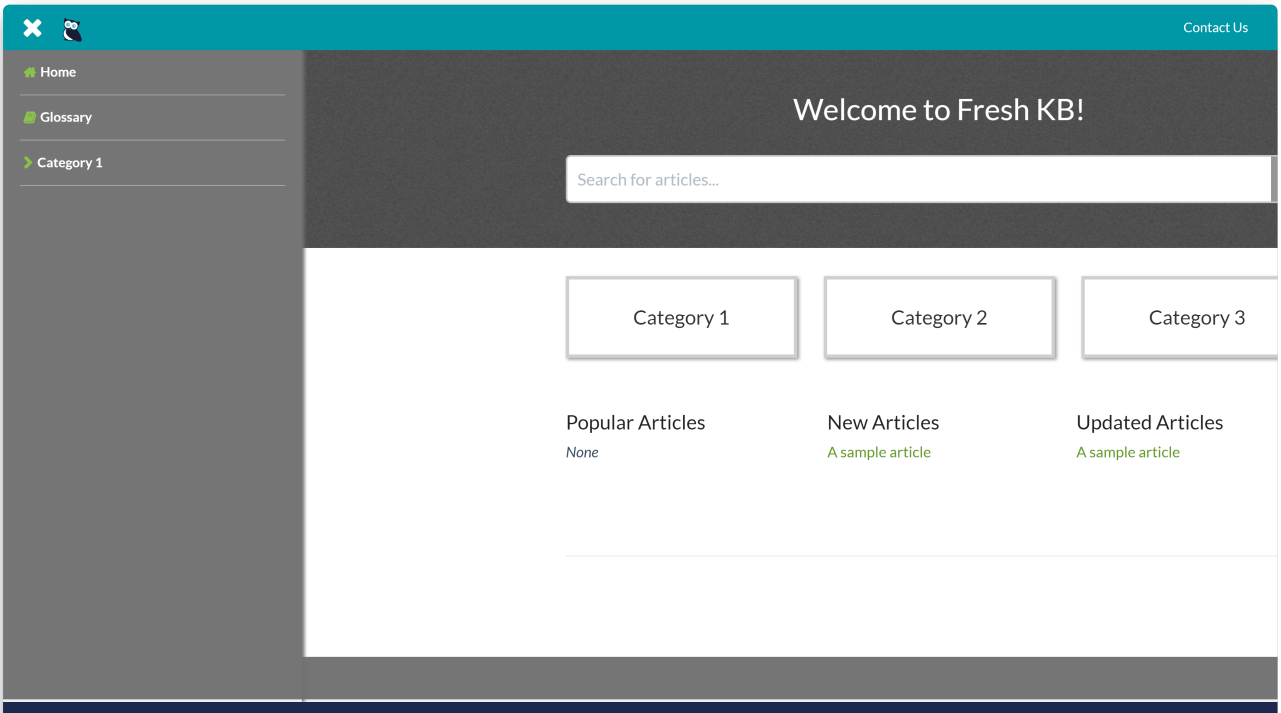
Minimalist is our default theme, inspired by some common theme changes we've seen customers make in their own knowledge bases.

It features:

- **A slide-out table of contents automatically collapsed to maximize screen real estate.**
  - **You can Change the slideout Table of Contents' width if you'd like.**
- **A simplified design to keep the focus on your content**
- **A site-wide footer**
- **No default knowledge base text in the top navigation, so you can add a logo that has its own text.**
- **Left- and right-hand white space to keep the focus on content, though you can add things to the righthand column.**
- **The tightest integration with the various color area pickers of all our themes.**



Minimalist theme homepage



Minimalist theme with table of contents expanded

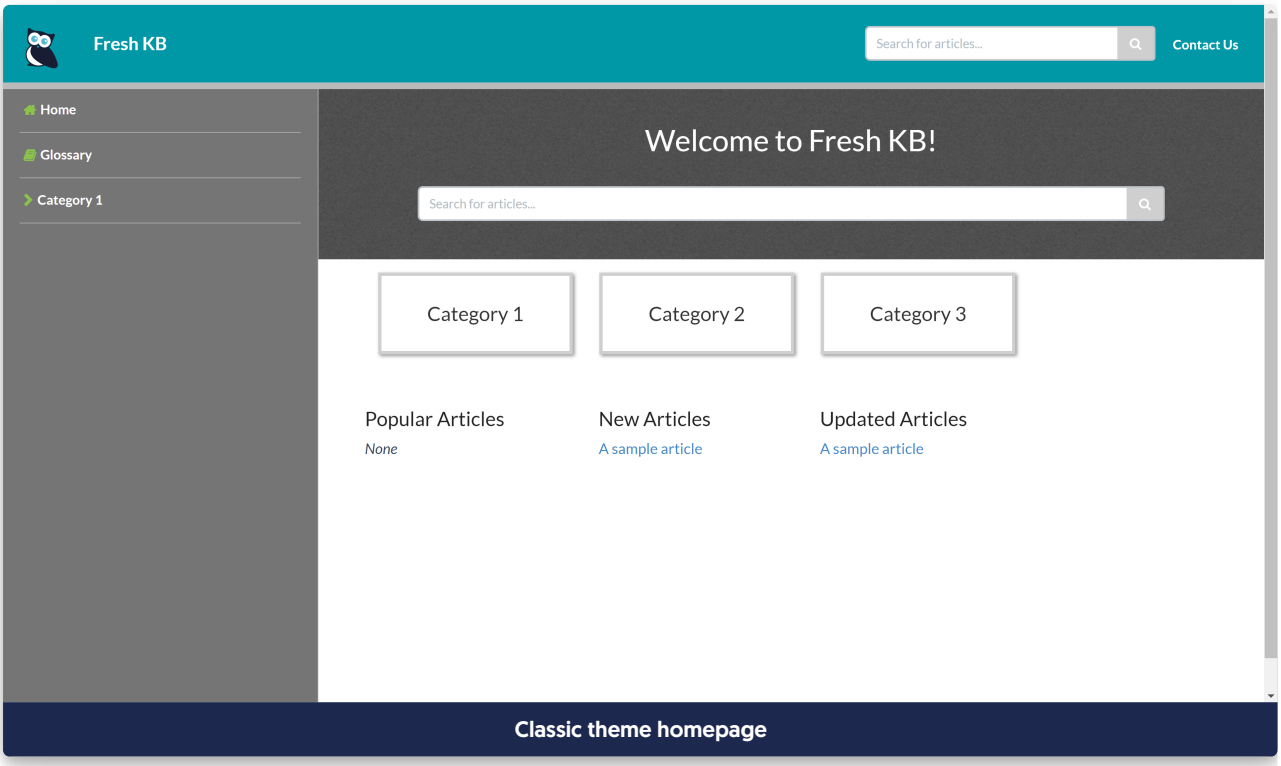


Minimalist theme article view

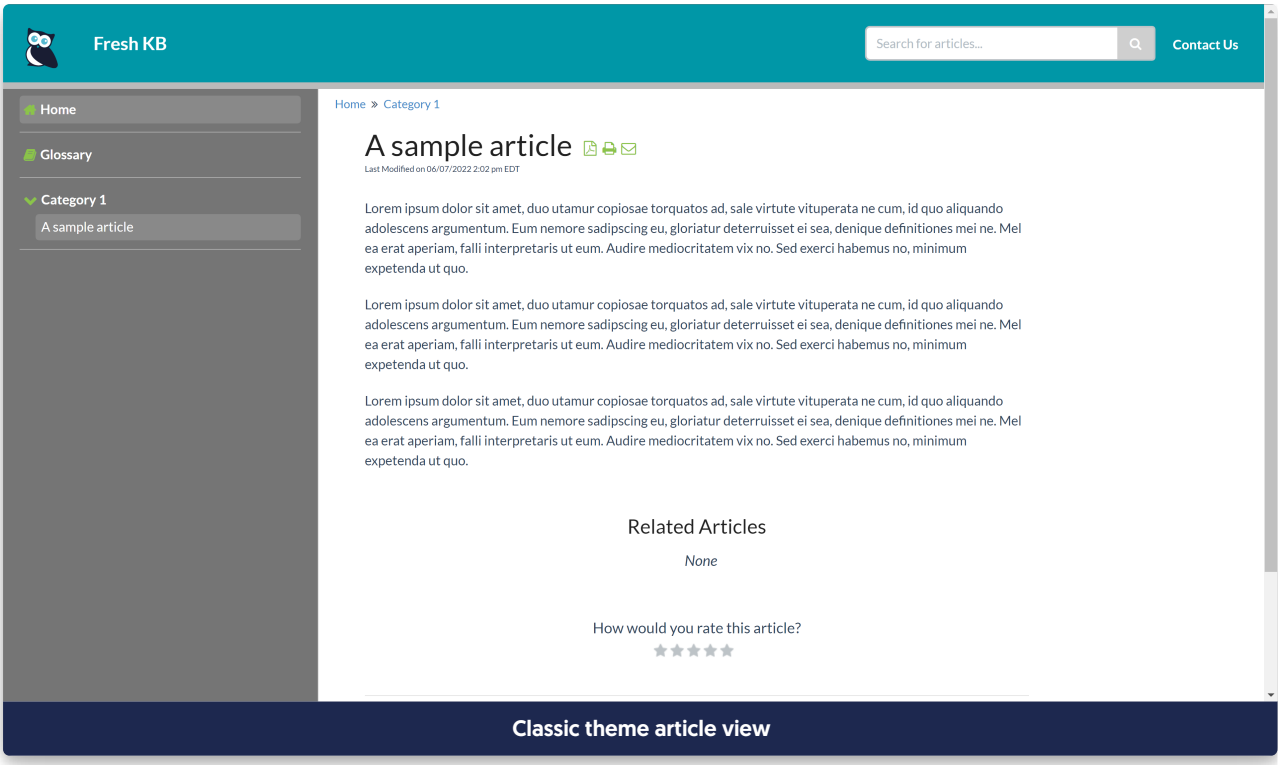
Classic

Our Classic theme features:

- **An always-present table of contents on the lefthand side which scrolls independently from the contents of the page.**
- **A standard navigation bar across the top, with space for a logo.**
- **Automatic display of your knowledge base's name**
- **Can be configured to keep the righthand column empty or display content such as related articles, etc.**



Classic theme homepage

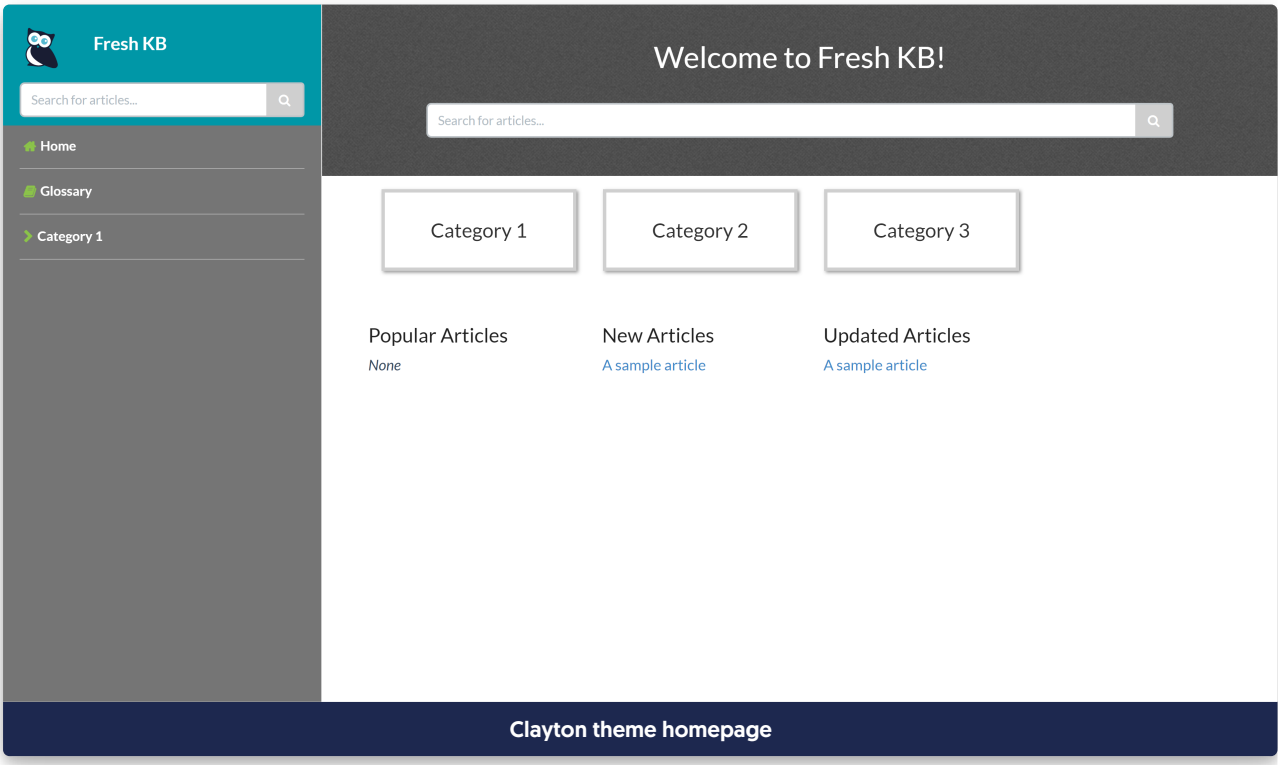


Classic theme article view

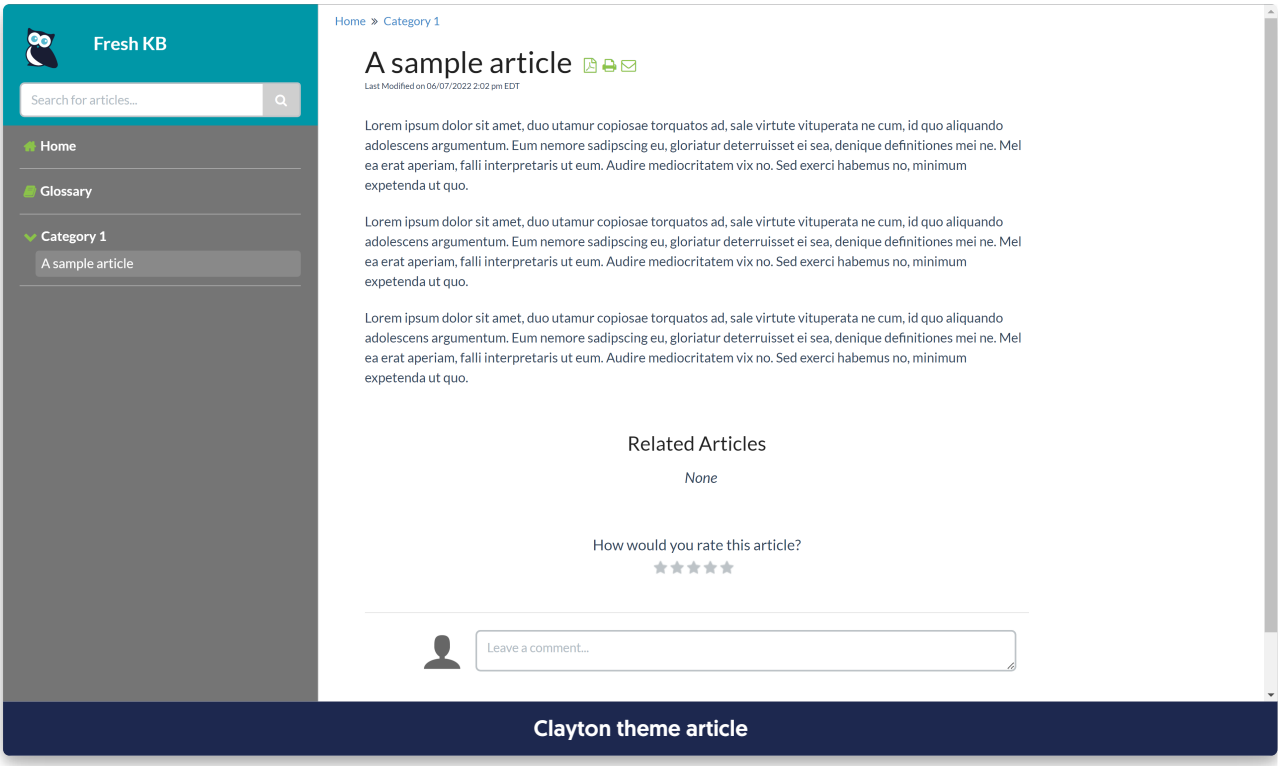
Clayton

Our Clayton theme was created by and named for one of our customers, and its focus is on using the full height of your screen for your content. It features:

- **An always-present lefthand table of contents which includes all navigation.**
- **No standard navigation bar across the top; all navigation is done through the lefthand column.**
- **Can be configured to keep the righthand column empty or display content such as related articles, etc.**



Clayton theme homepage

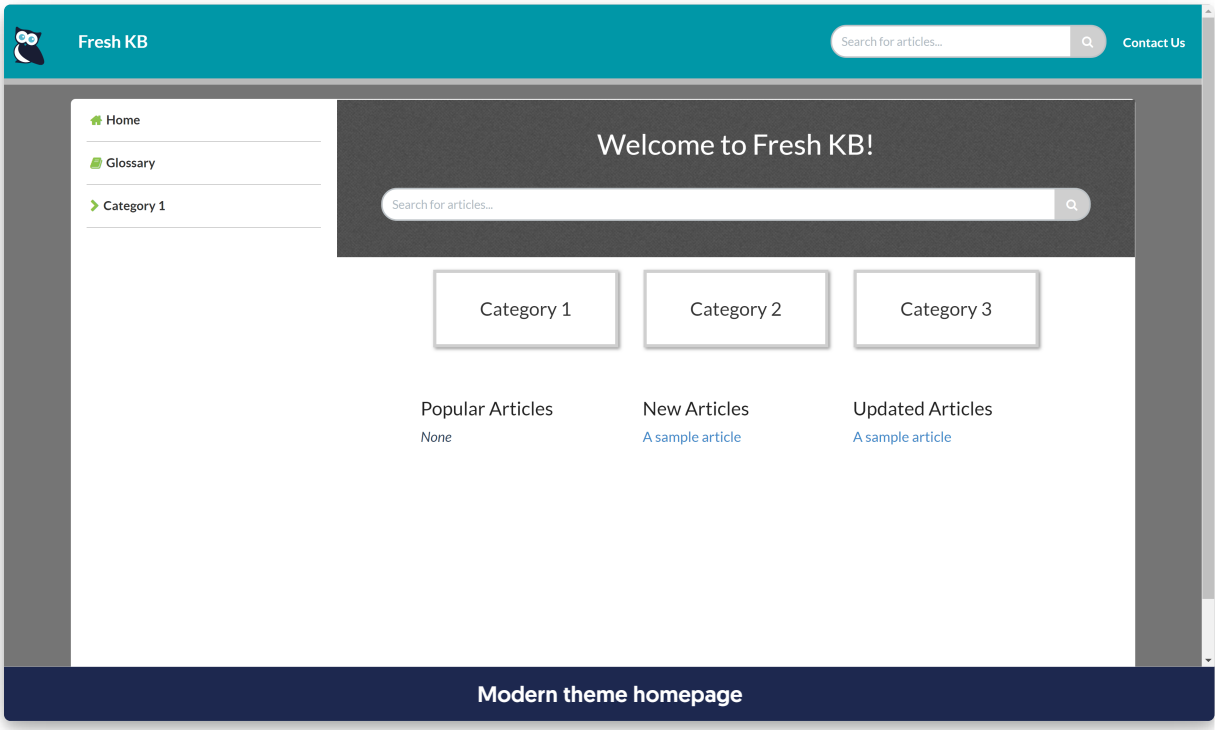


Clayton theme article

Modern

Our Modern theme features:

- **An always-present table of contents on the lefthand side which scrolls as the page scrolls.**
- **A standard navigation bar across the top, with space for a logo.**
- **Automatic display of your knowledge base's name**
- **Nearly full-screen width to display content.**



Modern theme homepage


Fresh KB
Search for articles...
Contact Us
Home
Glossary
Category 1
A sample article
Home » Category 1
A sample article
Last Modified on 06/07/2022 2:02 pm EDT
Lorem ipsum dolor sit amet, duo utamur copiosae torquatos ad, sale virtute vituperata ne cum, id quo aliquando adolescens argumentum. Eum nemore sadipscing eu, gloriatur deterruisset ei sea, denique definitiones mei ne. Mel ea erat aperiam, falli interpretaris ut eum. Audire mediocritatem vix no. Sed exerci habemus no, minimum expetenda ut quo.
Lorem ipsum dolor sit amet, duo utamur copiosae torquatos ad, sale virtute vituperata ne cum, id quo aliquando adolescens argumentum. Eum nemore sadipscing eu, gloriatur deterruisset ei sea, denique definitiones mei ne. Mel ea erat aperiam, falli interpretaris ut eum. Audire mediocritatem vix no. Sed exerci habemus no, minimum expetenda ut quo.
Lorem ipsum dolor sit amet, duo utamur copiosae torquatos ad, sale virtute vituperata ne cum, id quo aliquando adolescens argumentum. Eum nemore sadipscing eu, gloriatur deterruisset ei sea, denique definitiones mei ne. Mel ea erat aperiam, falli interpretaris ut eum. Audire mediocritatem vix no. Sed exerci habemus no, minimum expetenda ut quo.
Related Articles
None
How would you rate this article?
Modern theme article

Use the new Support theme

Last Modified on 08/21/2024 11:57 am EDT

In November 2022, we released a partial new theme for all new-from-scratch knowledge bases.

This theme is built on top of the **Minimalist** theme and uses the **Left 2 columns** layout, and it works best with that combination. You may need to adjust CSS if you are using other themes or layouts.

The CSS and HTML tweaks for this theme are automatically added to all knowledge bases created from scratch. If you'd like to try the theme out in an existing knowledge base, you'll need:

- **Custom CSS:** The full Custom CSS we use to modify the Minimalist theme is included below.
- **The back-to-top snippet:** if you copy the full Custom CSS from below, you can ignore the CSS portion of the instructions.
- **Custom HTML tweaks:** You'll need to make a couple small tweaks to your Custom HTML, and either to your **Custom HTML > Homepage** top-level **Homepage** depending on where your homepage HTML lives.

More detailed instructions:

1. If you'd like the back-to-top behavior, follow the instructions to Display a back to top icon when scrolling. You can skip steps 16 & 17, since the Custom CSS is included further below.
2. Go to **Settings > Style**.
3. In the **Customize HTML, CSS, and JS** section, select **Custom HTML**.
4. In the **Select HTML section to edit** dropdown, select **Homepage**.
5. Look through your Custom HTML for your homepage.
    - If the HTML there includes `[template("base-cats")]`, replace it with the icon-cats merge code instead. Refer to Add category icons to your homepage category panels for full details.
    - If the HTML there does not include `[template("base-cats")]`, go to **Homepage** in the upper left navigation. Replace the base-cats template merge code there with the icon-cats merge code. Refer to Add category icons to your homepage category panels for full details. Then come back here to **Settings > Style**!
6. In the **Select HTML section to edit** dropdown, select **Body**.
7. Update the top div here to add the `slideout-new` class:

```
<div class="row hg-site-body slideout-new">
  [template("layout")]
 {{snippet.backToTop}}
</div>
```

9. *Optional:* In the **Select HTML section to edit** dropdown, select **Article.** If this template has the article actions as raw HTML, as in the sample code block below, replace that HTML with the article action_icons merge code:

```
<div class="hg-article">
   <div class="hg-article-header">
      <h1 class="hg-article-title">[article("title")]<span class="ko-article-actions"><span class="pdf" title="PDF
```

   This is not required but it can help you clean up the code here a little. See Update your article actions merge code for full details.

10. Select **Custom CSS.**

11. Copy the CSS below and paste it into your Custom CSS pane. Once you're done, be sure to **Save** your changes.

```
/******************************************************* General structure ***************************/
/* smooth article resizing on TOC open/close */
.hg-minimalist-theme #ko-article-cntr {
  transition: all 300ms ease-in-out;
  width: 100%;
}
/* hide right col when TOC open */
.hg-minimalist-theme #ko-article-cntr.slideout-panel-left.open+.col-lg-3.visible-lg.right-column {
  opacity: 0;
  visibility: hidden;
}
/* size and position right column if in use */
.hg-minimalist-theme.hg-3column-layout .right-column {
  top: 65px;
  padding-right: 35px;
  z-index: 2;
  max-width: calc((100vw - 920px) / 2);
  transition: all 200ms ease-in-out;
  opacity: 1;
}
/* make sure footer is full width */
.hg-minimalist-theme.hg-3column-layout .ko-site-footer {
  width: 100%;
}
/* self clear page contents */
.documentation-body::after {
  content: "";
  display: table;
}
/* make site background white */
.hg-minimalist-theme .documentation-body {
  background: #ffffff;
}
.hg-site {
  background: #ffffff;
}

/******************************************************* Font overrides ***********************/
/* color for h1 */
.hg-minimalist-theme .documentation-article h1 {
  color: #1d284f;
}
```

```
/* article content h2 size */
.documentation-article h2 {
  font-size: 28px;
}
/* article content h3 size */
.documentation-article h3 {
  font-size: 24px;
}
/* article content h4 size */
.documentation-article h4 {
  font-size: 18px;
}
/* default color of a text (links) */
.hg-minimalist-theme a:not(.btn),
a:not(.btn) {
  color: #3C80BA;
}
/* remove bottom margin from paragraphs in article content */
.documentation-article p {
  margin-bottom: 0;
}
/* force default font size for blockquote */
blockquote {
  font-size: inherit;
}
/* override default font size for home page search bar */
.hg-minimalist-theme .ko-large-search input.form-control {
  font-size: 15px;
}

/****************************************************** Topic Category styles *********************/
/* remove top border, bottom margin from title container */
.hg-minimalist-theme .topics-top-wrapper {
  border-bottom: none;
  margin-bottom: 0px;
}
/* remove border, add padding for topic articles */
.hg-minimalist-theme .topics-articles .hg-article-body,
.hg-minimalist-theme .hg-category-page .hg-article-body {
  border-bottom: none;
  padding-bottom: 40px;
}
/* remove padding between topic articles */
.hg-minimalist-theme .topics-articles .hg-article-body {
  padding-bottom: 0px;
}
/* topic aricle h2 size */
.documentation-article .topics-articles h2.hg-article-title {
  font-size: 24px;
}
/* topic aricle h3 size */
.documentation-article .topics-articles h3 {
  font-size: 18px;
}
/* topic aricle h4 size */
.documentation-article .topics-articles h4 {
  font-size: 16px;
}

/****************************************************** Default Category Styles ********************/
/* add top and bottom margin to category panels */
.hg-minimalist-theme .category-list {
  margin-bottom: 40px;
  margin-top: 40px;
```

```
}
/* remove bottom border from title */
.hg-minimalist-theme .faq-header {
  border-bottom: none;
}
/* remove right margin from category description */
.hg-minimalist-theme .faq-top-description {
  margin-right: 0;
}
/* change category panels into 2x2 grid */
.hg-minimalist-theme .faq-nav-content .category-list {
  display: grid;
  grid-template-columns: repeat(auto-fit, minmax(400px, 1fr));
  gap: 20px;
  grid-auto-rows: 1fr;
}
/* get rid of psuedo html elements */
.hg-minimalist-theme .faq-nav-content .category-list .clear-left,
.hg-minimalist-theme .faq-nav-content .category-list .clear-both {
  display: none !important;
}
/* style category panels */
.hg-minimalist-theme .faq-nav-content .faq-cat-container {
  margin-left: 0;
  margin-right: 0;
  width: auto;
  border: 1px solid #dcdcdc;
  border-radius: 4px;
  transition: all .2s ease-in-out;
  backface-visibility: hidden;
}
/* hover effect for category panels */
.hg-minimalist-theme .faq-nav-content .faq-cat-container:hover {
  background-color: #fff;
  box-shadow: 2px 4px 4px #aeaeae;
  transform: scale(1.01) translateZ(0);
}
/* add bottom margin to list of articles */
.hg-minimalist-theme .faq-nav-content {
  margin-bottom: 40px;
}
/* remove right margin from category title */
.hg-minimalist-theme .faq-header {
  margin-right: 0;
}
/* hide h2 Articles from default categories */
.hg-minimalist-theme .faq-nav-content h2 {
  display: none;
}
/* Force main area to be full width */
.hg-minimalist-theme .hg-category-page .category-list .col-md-6.col-lg-4 {
  width: 100% !important;
}
/* adjust position of subscribe button */
.hg-minimalist-theme .ko-cat-sub-cntr {
  margin-top: 12px;
  margin-right: 0;
}
/* apply hover effects to subscribe button */
.hg-minimalist-theme .btn.btn-default.ko-cat-sub {
  border: 1px solid #b3b3b3;
  transition: all .1s ease-in-out;
  backface-visibility: hidden;
}
```

```
}
.hg-minimalist-theme .btn.btn-default.ko-cat-sub:hover {
  box-shadow: 1px 2px 2px #aeaeae;
  transform: scale(1.01) translateZ(0);
}
/* subcategory panel display tweaks */
.hg-minimalist-theme .faq-nav-content .faq-cat-panel-container {
  padding: 0;
}
.hg-minimalist-theme .faq-nav-content .faq-cat-panel {
  border: none;
  box-shadow: none;
  border-radius: 4px;
}
/* subcategory content-list display tweaks */
.hg-minimalist-theme .category-list.faq-content-list {
  margin-bottom: 0;
}
.hg-minimalist-theme .faq-content-list-container {
  width: auto;
  padding: 0;
}
.hg-minimalist-theme .faq-content-list-container .category-header {
  border-bottom: none;
  margin-bottom: 10px;
}
.hg-minimalist-theme .faq-nav-content .article-block div {
  margin-left: 0;
}

/********************************************************** Table of Contents ***********/
/* add border and box-shadow to TOC */
.hg-minimalist-theme.hg-2column-layout .slideout-menu {
  display: block;
  padding: 0;
  box-shadow: none;
  border: 1px solid #ddd;
  border-radius: 0 4px 0 0;
  background-color: #F8F4F1;
  left: -360px;
  transition: all 300ms ease-in-out;
}
/* remove TOC padding */
.hg-minimalist-theme .hg-site-body .documentation-outter-list {
  padding: 0;
}
/* style top level content */
.hg-minimalist-theme .documentation-categories li.level-0,
.hg-minimalist-theme .documentation-outter-list > .article-container {
  border-bottom: 0;
  padding: 0;
  margin-right: 0;
  margin-top: 0;
  margin-bottom: 0;
}
/* style child content containers */
.hg-minimalist-theme .documentation-categories li {
  margin-right: 5px;
  margin-top: 5px;
  margin-bottom: 5px;
}
.hg-minimalist-theme .documentation-categories li.level-0 > .category-link-container,
.hg-minimalist-theme .documentation-outter-list > .article-container {
  padding: 5px 10px;
}
```

```
}
/* style top level articles */
.hg-minimalist-theme .documentation-outter-list > .article-container .article-link {
  padding: 0 5px;
  line-height: 33px;
}
/* background color for active and hovered child content */
.hg-minimalist-theme .documentation-categories li.active,
.hg-minimalist-theme .category-link-container.active,
.hg-minimalist-theme .documentation-categories .article-container:hover,
.hg-minimalist-theme .documentation-categories li a:hover,
.hg-minimalist-theme .category-link-container:hover {
  background-color: #e8e8e8;
}
/* background color for active and hovered top level content */
.hg-minimalist-theme .level-0 > .category-link-container:hover,
.hg-minimalist-theme .level-0 > .category-link-container.active,
.hg-minimalist-theme .documentation-outter-list > .article-container:hover,
.hg-minimalist-theme .documentation-outter-list > .article-container.active,
.hg-minimalist-theme .documentation-outter-list > .article-container .article-link:hover,
.hg-minimalist-theme .documentation-outter-list > .article-container .article-link.active {
  background-color: #f2e9e3;
  border-radius: 0;
}
.hg-minimalist-theme .documentation-categories .level-0 > .category-link-container a:hover {
  background-color: #f2e9e3;
}
/* override default toc slideout behavior */
.hg-minimalist-theme #ko-article-cntr.slideout-panel.open {
  transform: translateX(360px);
  width: calc(100% - 360px);
}
/* Change TOC chevron-right to plus-square */
.hg-minimalist-theme .documentation-categories .fa-chevron-right:before {
  content: "\f0fe" !important;
}
/* Change TOC chevron-down to minus-square */
.hg-minimalist-theme .documentation-categories .fa-chevron-down:before {
  content: "\f146" !important;
}
/* make icons slightly larger */
.hg-minimalist-theme .cat-icon, .hg-minimalist-theme .home-icon, .hg-minimalist-theme .alt-icon {
  padding: 8px 0 0 6px;
  font-size: 18px;
}
/* override default box shadow when side TOC is open */
.hg-minimalist-theme .documentation-categories.slideout-menu.open {
  box-shadow: 2px 4px 4px #aeaeae;
  left: 0;
}

/************************************************************ Modals ********************/
/* adjust input border width in modals */
.hg-minimalist-theme .modal .form-control {
  border-width: 1px;
}

/************************************************************ PDF Adjustments ***********/
/* hide .pdf-header outside of actual PDFs */
.hg-minimalist-theme .pdf-header {
  display: none;
}
/* show .pdf-header in actual PDFs */
.hg-minimalist-theme .hg-pdf .pdf-header {
  display: block;
```

```
  display: block;
}
/* height of image in .pdf-header */
.hg-minimalist-theme .hg-pdf .pdf-header img {
  height: 80px;
}

/******************************************************* Home Page Top and General */
/* get rid of background banner and add some padding to top of home page */
.hg-minimalist-theme .ko-homepage-top {
  background: none;
  padding-top: 2em;
  padding-bottom: 0em;
}
/* make sure category title is clickable */
.hg-minimalist-theme .hg-home-page .category-header {
  z-index: 2;
}
/* change default color for home page title */
.hg-minimalist-theme .ko-homepage-top .hg-article-title {
  color: #1d284f;
}

/******************************************************* Content Lists */
/* tweak padding and line heights */
.hg-minimalist-theme .stat-list {
  line-height: 1.3;
  font-size: 14px;
  margin-left: 1px;
}
.hg-minimalist-theme .stat-list li {
  padding: 4px 0;
}
/* remove bottom border from page title */
.hg-minimalist-theme .page-header {
  border-bottom: none;
}
/* remove border above "see more..." */
.hg-minimalist-theme .list-action {
  border-top: none;
}
/* correct margin and padding for content lists on homepage */
.hg-minimalist-theme .homepage-widgets {
  margin: 2em -15px;
}
.hg-minimalist-theme .homepage-widgets .col-md-4.col-sm-6 {
  padding-left: 15px;
}

/******************************************************* Search Bar */
/* remove border from individual search bar elements */
.hg-minimalist-theme .hg-search-bar input.form-control,
.hg-minimalist-theme .input-group-btn .btn,
.hg-minimalist-theme .input-group-btn .btn:hover,
.hg-minimalist-theme .hg-search-bar input.form-control:focus,
.hg-minimalist-theme .input-group-btn .btn:focus,
.hg-minimalist-theme .input-group-btn .btn-default.dropdown-toggle:active,
.hg-minimalist-theme .input-group-btn .btn-default.dropdown-toggle:focus {
  border: none;
}
/* add border to outer search bar */
.hg-minimalist-theme .hg-search-bar .input-group {
  border: 1px solid #E6E6E6;
  border-radius: 4px;
```

```
  transition: border .25s linear,color .25s linear,background-color .25s linear;
}
/* change border color on focus/active */
.hg-minimalist-theme .hg-search-bar .input-group:active,
.hg-minimalist-theme .hg-search-bar .input-group:focus,
.hg-minimalist-theme .hg-search-bar .input-group:focus-within {
  border: 1px solid #f8b88b;
}
/* remove background color from search button */
.hg-minimalist-theme .input-group-btn .btn {
  background: none;
}
/* adjust color and sizing for the refine button */
.hg-minimalist-theme .input-group-btn .btn-default.dropdown-toggle {
  color: #1d284f;
  font-size: 16px;
  border: none;
}
/* restyle the dropdown caret */
.hg-search-bar .category-dropdown .dropdown-toggle .caret {
  border: none;
  display: inline;
  font-family: 'Font Awesome 6 Pro';
  font-weight: 300;
  font-size: 14px;
}
.hg-search-bar .category-dropdown .dropdown-toggle .caret::before {
  content: "\f0d7";
}
/* change font color and remove border for search button */
.hg-minimalist-theme span.input-group-btn .btn-default,
.hg-minimalist-theme span.input-group-btn .btn-default:hover {
  color: #E6E6E6;
  border-left: none;
}
.hg-minimalist-theme .ko-large-search input.form-control,
.hg-minimalist-theme .hg-search-bar input.form-control {
  border-right: none;
}
/* add box-shadow to search bar */
.hg-minimalist-theme .input-group {
  box-shadow: 0px 2px 20px rgba(0, 0, 0, 0.05);
}
/* remove box shadow from type-ahead suggestion box */
.hg-minimalist-theme .navbar-collapse.in .input-group,
.hg-minimalist-theme .navbar-collapse.collapsing .input-group {
  box-shadow: none;
}
/* handle styles for showing/hiding type-ahead suggestion box */
.hg-minimalist-theme #navbar-collapse.in,
.hg-minimalist-theme #navbar-collapse.collapsing {
  margin-bottom: 0;
  padding: 10px;
  border-radius: 0px 0px 4px 4px;
  box-shadow: 0px 10px 20px -8px #ccc;
}

/******************************************************** Search Pages */
/* adjust bottom spacing page titles and containers */
.hg-minimalist-theme .recommended-container h2,
.hg-minimalist-theme .hg-contact-form-container h2,
.hg-minimalist-theme .hg-article-search {
  margin-bottom: 40px;
}
```

```
/* add bottom margin to search controls */
.hg-minimalist-theme .ko-srch-meta-cntr {
  margin-bottom: 20px;
}
/* add more top margin to full search results */
.hg-minimalist-theme #homepage-search-form .hg-article-search {
  margin-top: 20px;
}
/* remove bottom spacing from recommended article titles */
.hg-minimalist-theme .hg-article-search h4 {
  margin-bottom: 0;
}
/* increase space between article results */
.hg-minimalist-theme .hg-article-search li {
  margin-bottom: 25px;
}
/* adjust size/spacing of article meta data */
.hg-minimalist-theme .hg-article-info {
  font-size: 12px;
  margin-bottom: 5px;
}
/* add spacing after article blurbs */
.hg-minimalist-theme .hg-article-blurb {
  margin-bottom: 25px;
}
/* make last modified text for recommended articles smaller */
.hg-minimalist-theme .hg-article-search .hg-date {
  font-size: 14px;
}
/* adjust font size and line height for contact form labels */
.hg-minimalist-theme .hg-contact-form-container label {
  font-size: 18px;
  line-height: 1.3;
}
/* decrease width of contact form field borders */
.hg-minimalist-theme .hg-contact-form-container .form-control {
  border: 1px solid #bdc3c7;
}
/* update colors for the results paging buttons */
.hg-minimalist-theme .ko-search-pager li.current {
  background: #1d284f;
}
.hg-minimalist-theme div.ko-search-pager .pull-left:not(.current) a:not(.btn) {
  color: #1d284f;
}
.hg-minimalist-theme div.ko-search-pager .pull-left:not(.current) a:not(.btn):hover {
  color: #f8b88b;
}

/*********************************************************** Tables ************************************/
/* adjust table header cell styles */
.table-bordered > thead > tr > th {
  background-color: #1d284f;
  color: #ffffff;
  padding-left: 1em;
}
/* give left aligned cells some left padding */
.table-bordered>tbody>tr>td,
.table-bordered>tfoot>tr>td,
table.table-bordered tr td[style*="text-align: left"] {
  padding-left: 1em;
}

/*********************************************************** Article HTML ************************************/
```

```
/* add some padding to line items */
.hg-article-body ol li {
  padding: 10px 0;
}
/* first level - use regular numeric decimals  */
.hg-article-body ol {
  list-style-type: decimal;
}
/* second level - use lowercase alphabetic */
.hg-article-body ol > li > ol {
  list-style-type: lower-alpha;
}
/* third level - use lowercase Roman numerals */
.hg-article-body ol > li > ol > li > ol {
  list-style-type: lower-roman;
}
/* optional .article-block styles */
.article-block div {
  margin-left: 20px;
  font-size: 15px;
  line-height: 1.2;
}
/* default margin for p in lists */
.hg-article-body ul p,
.hg-article-body ol p {
  margin: 20px 0 0;
}
/* give more top space to article ratings */
.hg-minimalist-theme .hg-ratings {
  margin-top: 15px;
}
/* space out the article rating thumbs */
.hg-minimalist-theme .hg-ratings .hg-helpful {
  margin-right: 20px;
}
/* styles for check-list bullet points */
ul.check-list {
  list-style: none;
  padding-left: 0;
}
ul.check-list li {
  position: relative;
  padding-left: 1.5em;
}
ul.check-list li:before {
  font-family: 'FontAwesome';
  content: "\f00c" !important;
  padding-right: 0.5em;
  font-size: smaller;
  color: green;
}
/* remove top border from comment form */
.hg-minimalist-theme #hg-comment-form {
  border-top: none;
}

/************************************************** List pages **********/
/* remove top border from glossary page */
.hg-minimalist-theme .glossary-letter ~ .glossary-letter {
  border-top: none;
}
/* left align article lists */
.hg-minimalist-theme .hg-widget-page .ko-content-cntr ol {
  padding-inline-start: 20px;
```

```
}

/*************************************************** Alert boxes **********/
/* give alerts, wells, pre some top margin */
.alert, .well, pre {
  margin-top: 20px;
}
/* icon styling for all alerts */
.alert::before {
  display: block;
  width: 65px;
  height: 60px;
  float: left;
  margin-top: 0px;
  font-size: 48px;
  font-weight: 900;
  font-family: 'Font Awesome 6 Pro';
  -moz-osx-font-smoothing: grayscale;
  font-style: normal;
  font-variant: normal;
  line-height: 60px;
  text-rendering: auto;
}
/* danger alert styling */
.alert.alert-danger {
  background: #F4E2E2;
  border: 1px solid #E6ADA9;
}
.alert.alert-danger:before {
  content: "\f071";
  color: #f8918b;
}
/* info alert styling */
.alert.alert-info {
  background: #F0F7FD;
  border: 1px solid #69B2F0;
}
.alert.alert-info:before {
  content: "\f05a";
  color: #97c4ed;
}
/* success alert styling */
.alert.alert-success {
  background: #F8FBF9;
  border: 1px solid #BDDCBC;
}
.alert.alert-success:before {
  content: "\f058";
  color: #9bdbae;
}
/* warning alert styling */
.alert.alert-warning {
  background: #FDF9E6;
  border: 1px solid #FBD9A4;
}
.alert.alert-warning:before {
  content: "\f8fa";
  color: #ffcc7a;
}
/* remove top margin from p tags in alerts */
.alert.alert-info p,
.alert.alert-success p,
.alert.alert-warning p,
.well p {
```

```
  margin-top: 0;
}
/* make sure there is vertical room icons in alerts */
.alert.alert-info,
.alert.alert-success,
.alert.alert-danger,
.alert.alert-warning {
  min-height: 90px;
}
/* Offset lists that are within alert divs */
.alert ul,
.alert ol {
  margin-left: 75px;
}

/********************************************************************************** Image Captions *****/
/* Set dark background for captions */
.hg-minimalist-theme .documentation-article .fr-img-caption .fr-img-wrap>span {
  background: #1d284f;
}
/* Remove border for image captions */
.hg-minimalist-theme .documentation-article span.fr-img-caption {
  border: none;
}
/* Fix hyperlinks in image captions, now that we have the dark background */
.hg-minimalist-theme span.fr-inner a {
  color: #F6A267;
  text-decoration: none;
}
/* Image caption hyperlinks should be a different color and underlined on-hover */
.hg-minimalist-theme .fr-inner a:hover {
  color: #F8B88B;
  text-decoration: underline;
}

/********************************************** Back to top snippet styling */
/* basic styles */
.back-to-top {
  background-color: #fff;
  margin: 0;
  position: fixed;
  bottom: 100px;
  right: 45px;
  width: 55px;
  height: 45px;
  z-index: 100;
  text-decoration: none;
  text-align: center;
  border-radius: 4px;
  border: 1px solid #acacac;
  box-shadow: 1px 3px 3px #aeaeae;
  visibility: hidden;
  opacity: 0;
  transition: all .2s ease-in-out;
}
/* make visible when scrolled down on page */
.back-to-top.visible {
  visibility: visible;
  opacity: 1;
}
/* icon styles */
.back-to-top i {
  font-size: 45px;
  color: #3a3a3a;
```

```
}
/* mouse effect styles */
.back-to-top:hover,
.back-to-top:active,
.back-to-top:focus {
  color: #ffffff;
}

/********************************************** Miscellaneous */
/* optional .margin-top-20 class */
.hg-minimalist-theme .margin-top-20 {
  margin-top: 20px;
}
/* panels within the right column */
.hg-minimalist-theme .right-col-panel {
  border-radius: 4px;
}
.hg-minimalist-theme .right-col-panel .panel-heading {
  color: #fff;
  background: #1d284f;
  border-radius: 4px 4px 0 0;
}
/* Add styles for in article TOC snippet to work*/
.hg-minimalist-theme .toc-top {
  background-color: #f5f5f5;
  border: 1px solid #e3e3e3;
  border-radius: 4px;
  box-shadow: 0 1px 1px rgba(0, 0, 0, 0.05) inset;
  margin-bottom: 20px;
  min-height: 20px;
  padding: 5px 30px;
}
/* In article TOC snippet style */
.hg-minimalist-theme .toc-anchor {
  display: block;
  height: 140px;
  margin-top: -140px;
  visibility: hidden;
}
/* remove bottom border for articles */
.hg-minimalist-theme .hg-article-body {
  border-bottom: none;
}
.ko-content-cntr .pager {
  margin-top: 40px;
}

/********************************************************************** 404 page **********************/
/* remove top border */
.hg-minimalist-theme .error-page-top {
  border: none;
}

/********************************************************************** No access page ****************/
/* vertically center h4 */
.hg-site-login .alert h4 {
  margin-top: 10px;
}
/* remove duplicate icon */
.hg-site-login .alert h4 i {
  display: none;
}

/********************************************************************** Screen size specific adjustments ***********
```

```
/* will apply to screen widths narrower than 1474px */
@media (max-width: 1473px) {
  /* shrink main content area */
  .hg-minimalist-theme.hg-3column-layout:not(.hg-home-page) .ko-content-cntr {
    max-width: 700px;
  }
  /* expand right col size */
  .hg-minimalist-theme.hg-3column-layout .right-column {
    max-width: calc((100vw - 720px) / 2);
  }
}
/* will apply to screen widths narrower than 992px */
@media (max-width: 991px) {
  .hg-minimalist-theme #ko-article-cntr.slideout-panel.open {
    width: 100%;
  }
}
/* will apply to screen widths wider than 575px, not narrower */
@media (min-width: 576px) {
  .hg-minimalist-theme .hg-home-page .category-list>div {
    width: 50%;
    float: left;
  }
  .hg-minimalist-theme .category-img {
    max-width: 50%;
  }
}
/* will apply to screen widths wider than 767px */
@media(min-width:768px) {
  .hg-minimalist-theme .lead,
  .hg-minimalist-theme .lead p {
    font-size: 30.01px !important
  }
}
/* will apply to screen widths wider than 991px */
@media (min-width: 992px) {
  .hg-minimalist-theme .hg-home-page .category-list>div {
    width: 25%;
  }
  .hg-minimalist-theme .category-img {
    max-width: 50%;
  }
}
```

Choose your layout

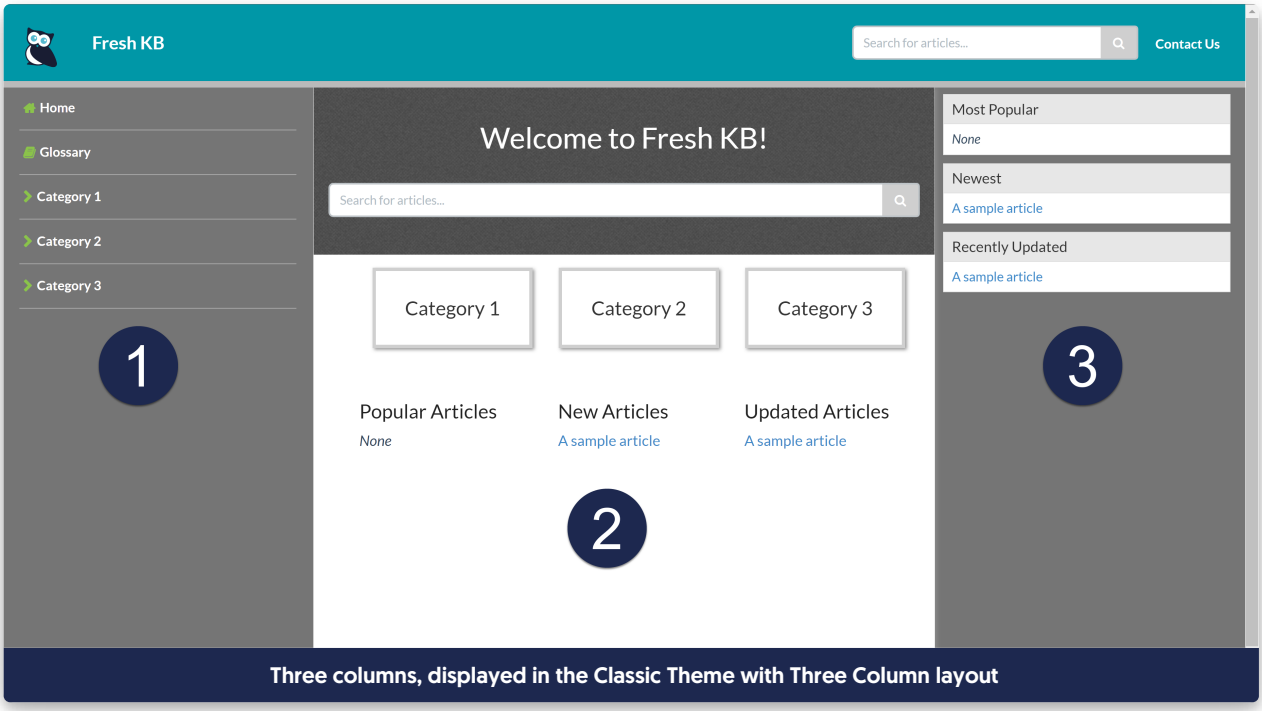
Last Modified on 07/10/2024 4:25 pm EDT

Only available to older knowledge bases
New knowledge bases created after 5 December 2023 don't have the option to select different themes or layouts; they use the Minimalist theme and Left two column layout.
If you have a new knowledge base that needs to use one of our older themes, please contact us to enable the older themes. (Note that switching to the older themes removes some options, like the Table of contents control.)

Layouts control the visible columns in your knowledge base. You will always have at least one column for your main content like the homepage, search results, and articles.

The layout options include one, two, or three columns:

1. The **left column** is generally reserved for the table of contents; choosing the Right Two Columns or One Column layouts generally disables the table of contents.
2. The **middle column** is used for displaying article or category content. This column is included in all layouts.
3. The **right column** is used for metadata (such as Related Articles, article lists, etc.) and is generally governed by the Custom HTML for Right Column.



Three columns, displayed in the Classic Theme with Three Column layout

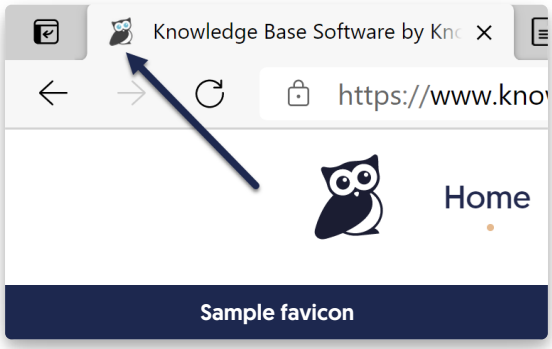
Here's a more detailed breakdown of each layout option:

- **Three Columns:** Displays three columns. Right Column uses the Custom HTML for Right Column in all themes.
    - For the Classic, Clayton, and Modern themes, this will significantly reduce the amount of screen space for article content.
    - In Minimalist theme, no left column is displayed, since the table of contents is hidden in the slide-out menu. When the table of contents is opened, the Right Column will slide off the screen.
- **Left Two Columns (default):** This displays the table of contents properly in Classic, Clayton, and Modern themes while maximizing the available space for article content. It produces no noticeable changes in the Minimalist theme.
- **Right Two Columns:** This option will hide the table of contents completely in the Classic, Clayton, and Modern themes and display the right column with metadata. It produces no noticeable changes in the Minimalist theme.
- **One Column:** This option will hide the table of contents as well as the right column in all four themes, and will also left-justify article breadcrumbs wherever they appear.
    - In the Minimalist theme, this layout also removes the hamburger menu to expand the table of contents.
    - In Clayton theme, this layout overrides the lefthand navigation and forces a top navigation bar that is oversized and overlaps the article title. We do NOT recommend using this layout with the Clayton theme!

Change your favicon

Last Modified on 05/29/2024 5:28 pm EDT

A favicon is the tiny image that appears to the left of website names in browser tabs. Here is an example:



Sample favicon

If you are interested in learning more about them, take a look at the favicon Wikipedia article.

By default, when readers view your knowledge base, they will see a document favicon like this:



Default favicon in your knowledge base

Change your favicon

To change the favicon displayed when anyone views your knowledge base, you will need to have an `.ico`, `.png`, or `.gif` file of the image you'd like to use. We recommend using an .ico or .png file, as .gifs generally don't display as well as you want them to. 😉

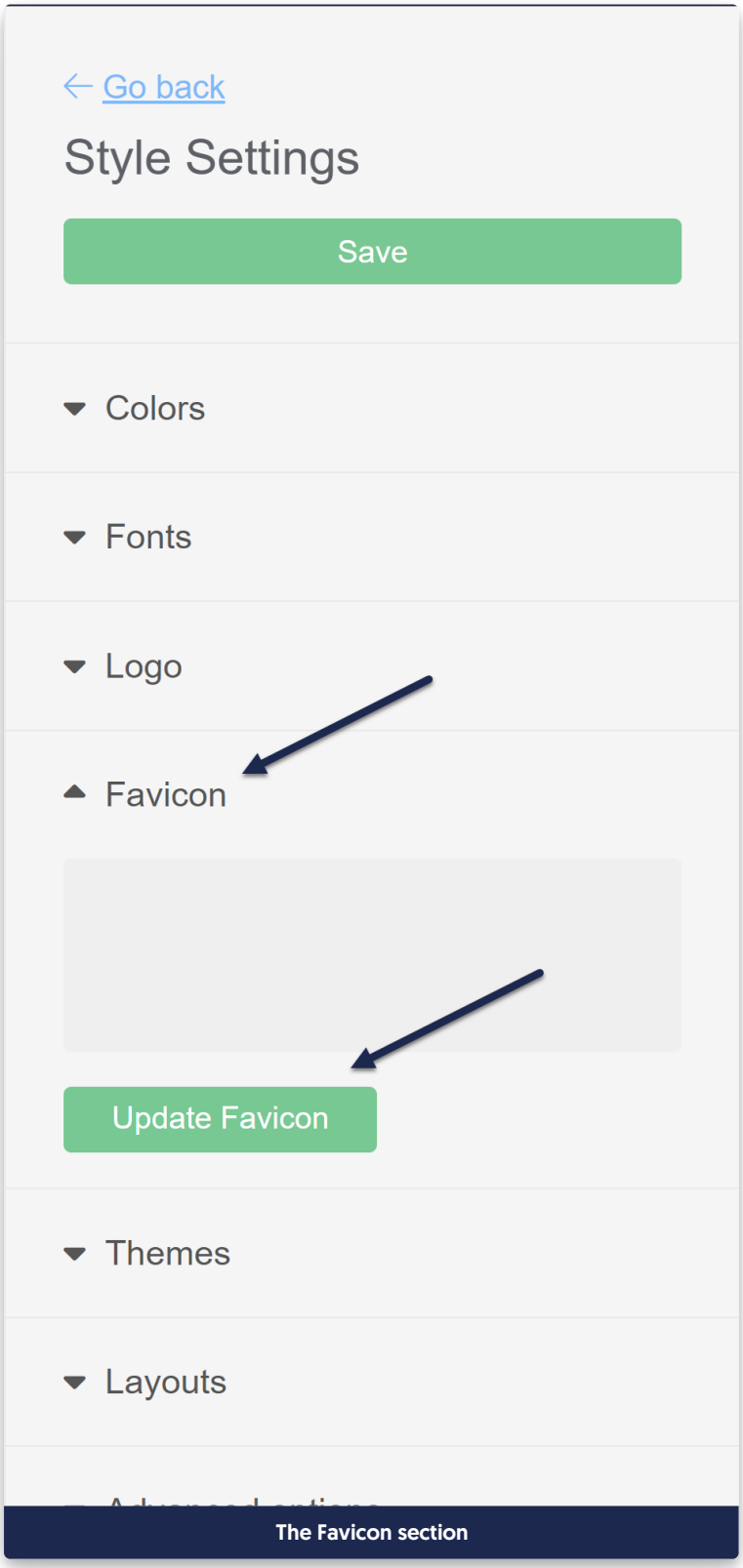
If you don't have an existing file, there are a number of Favicon Generators and instructions online on how to create your own. Get creative!

Most favicon generators suggest a 100px x 100px image or icon. We recommend 32px x 32px, but the main point is to have something that's square and small.

Once you have your file:

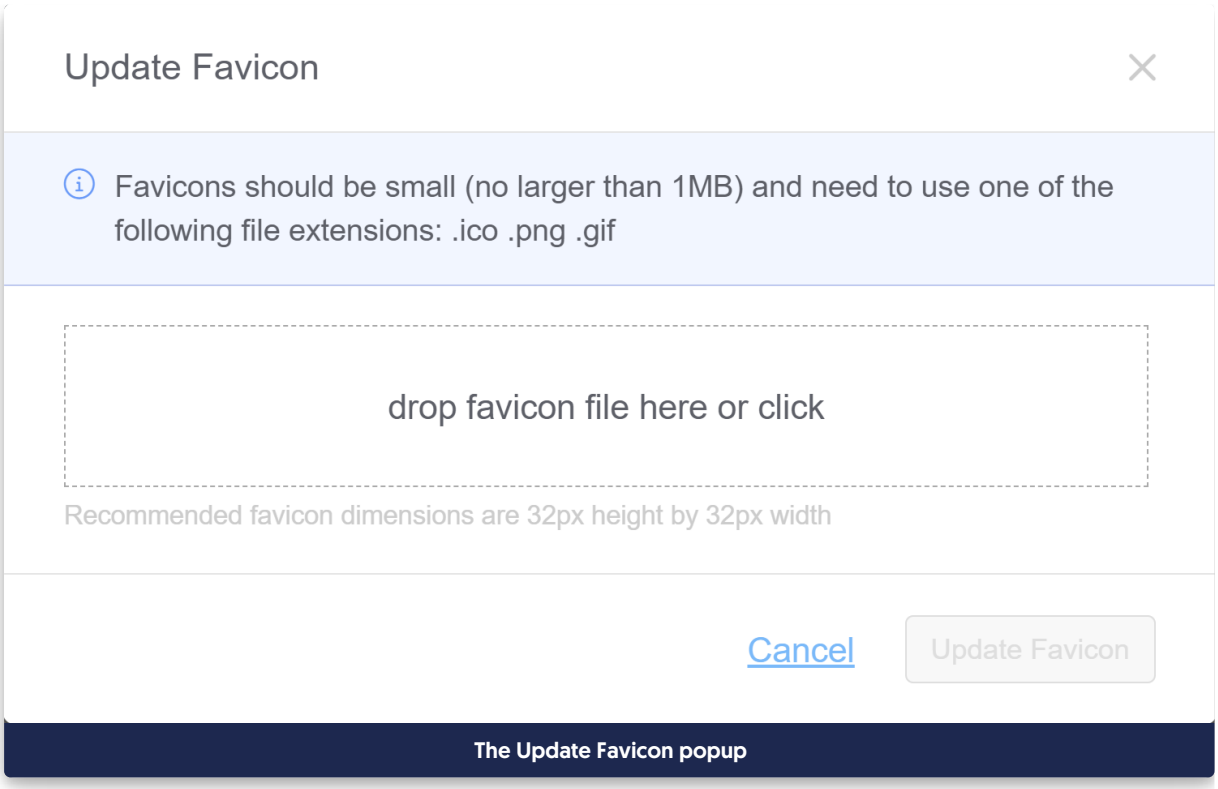
1. Go to **Settings > Style**.
2. In the lefthand pane, click to expand the **Favicon** section.

3. Select the **Update Favicon** button.



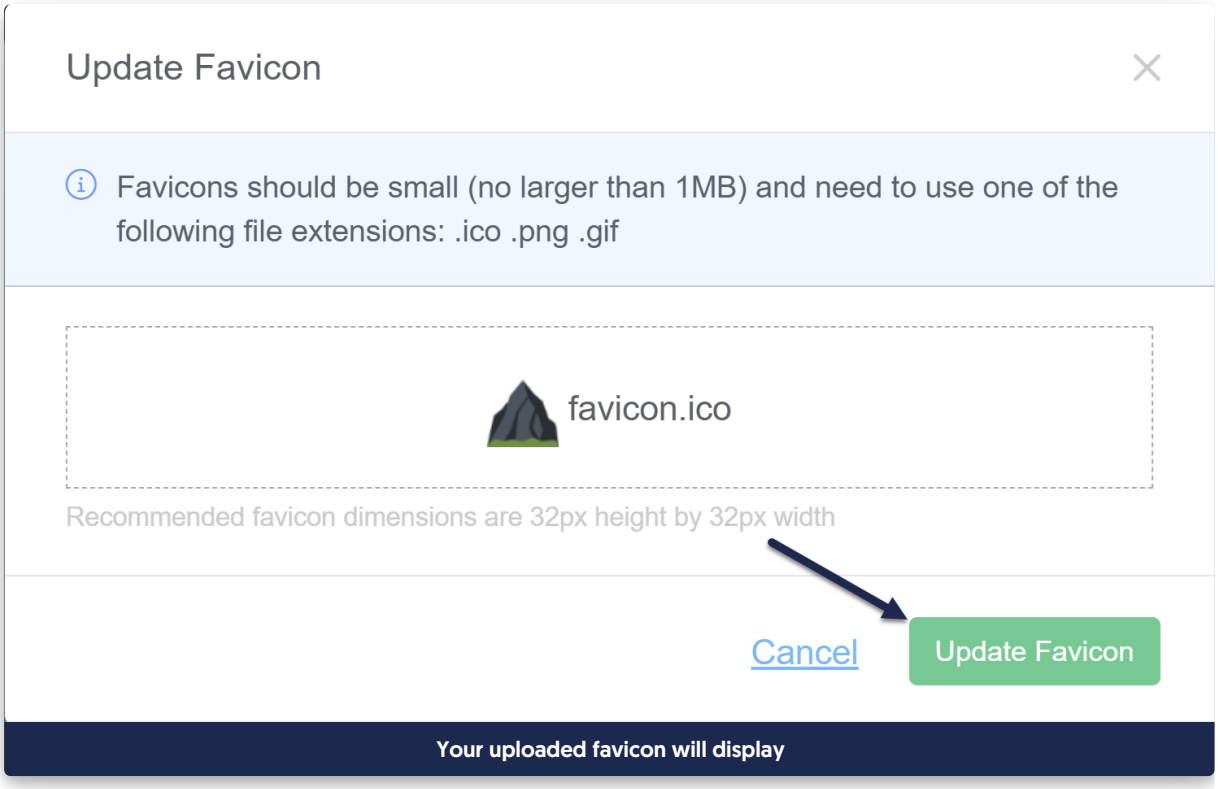
The Favicon section

4. This will open the **Update Favicon** pop-up. You can drag to add the file or click to browse to your file:



The Update Favicon popup

5. **Once you've added your file, the window will display a preview of your file. If everything looks correct, click the Update Favicon button.**



Your uploaded favicon will display

6. **Be sure to Save your changes once you're done.**

Your new favicon will now be live!

Our previous instructions for adding a favicon had you add some HTML code to the Custom

<head> section, which looked like this:

```
<link href="" rel="shortcut icon" type="image/x-icon" />
```

For example:

Custom CSS | Custom HTML | Custom <head>

Custom <head>

```
<link rel='shortcut icon' href='//dyzz9obi78pm5.cloudfront.net/app/image/id/5
/n/linus-fav-510.ico' type='image/x-icon'/ >
```

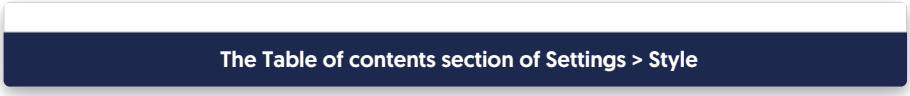
Sample favicon HTML

If you already had a favicon in your knowledge base added this way, we recommend removing that line of HTML from your Custom <head> section after you've uploaded the favicon. The uploaded favicon will still work properly if you don't, but removing it helps to keep that Custom <head> section tidy!

Choose your table of contents behavior

Last Modified on 07/17/2024 10:47 am EDT

Limitations
This option is only available for knowledge bases that do not have theme/layout selection options (these knowledge bases are hard-coded to Minimalist theme with Left two columns layout).
If you're using Minimalist theme with Left two columns layout and you'd like to use the Table of contents control, please contact us to enable the option! This will disable the theme and layout options.



The **Table of contents** section in **Settings > Style** allows you to control the table of contents open/closed behavior. It has three options:

- **Always open**: The table of contents is open on all pages and the reader cannot close it.
  - On smaller screens, the table of contents will be closed until the reader opens it using the hamburger menu.
- **Closed on the homepage, open everywhere else**: The table of contents is closed on the homepage until a reader selects the hamburger menu to open it. On all other pages, it's open with no way of closing it.
  - On smaller screens, the table of contents will be closed on all pages until the reader opens it using the hamburger menu.
- **Closed until opened**: The table of contents is closed on all pages until the reader clicks the hamburger menu to open it.

Once you've made your selection, be sure to **Save** your changes.

Set your knowledge base time zone, date, and language

Last Modified on 05/29/2024 5:28 pm EDT

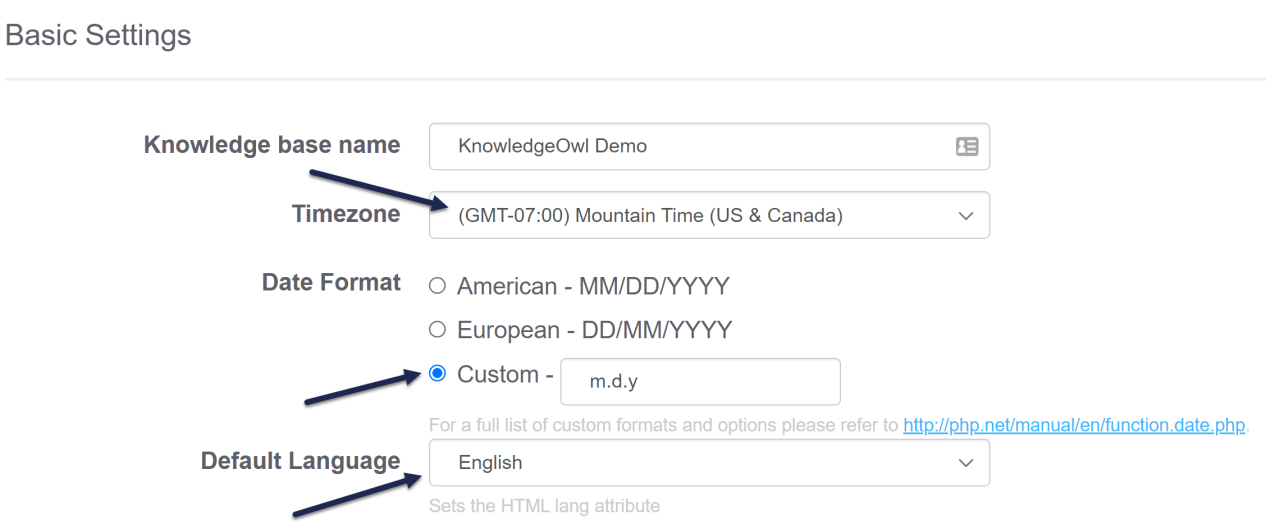
In your knowledge base, you can localize your knowledge base to set:

- The time zone your dates will display in
- The format for dates
- The default language (sets the underlyingHTML "lang" attribute, which helps screen readers know what the primary language you're using is)

To do so:

1. Go to **Settings** > **Basic**.
2. In **Basic Settings**, use the Timezone dropdown to select the time zone of your choice.
3. In the same section, you can choose an appropriate **Date Format**. The default is American: MM/DD/YYYY. You can also choose a pre-built European format: DD/MM/YYYY or define your own Custom format. For the custom format, you can see some samples with their output in the official PHP documentation, in the date() Formatting section.
    - For example, to use a format of YYYY-DD-MM, use: `Y-m-d`
    - Or, to use MM.DD.YY, use `m.d.y`
4. Also in the same section, be sure to set your knowledge base's **Default Language**.
5. Be sure to **Save** your changes once you're done.

Here, for example, we've set our knowledge base to use the US & Canada's Mountain Time zone, a Custom date format of month.day.year, and English as our Default Language:



Customize style or layout with HTML/CSS

Last Modified on 08/21/2024 1:59 pm EDT

All plans have full access to the HTML and CSS of your knowledge base theme. This allows you to customize your theme to your liking.

Almost any element of your knowledge base can be customized. If you're HTML and CSS savvy you can override/add to KnowledgeOwl's defaults from your Style page. Throughout this support knowledge base, you'll likely also see changes you can make to HTML and CSS to add customized behavior or look/feel, too. Got a question not answered by our documentation? Contact us and our friendly support owls will do their best to help.

To edit Custom HTML and Custom CSS globally, head to **Settings > Style**. Changes made here will apply across your entire knowledge base.

To make changes within an individual article, you can add a `<style>` section directly into the HTML. To prepackage HTML or CSS to be used repeatedly but not globally, try creating it in a snippet and adding that snippet where you want the changes applied.

Custom HTML

You can use Custom HTML to choose what elements to display and where you want them to display. We have a built-in merge code helper to allow you to insert common elements into your theme like our article lists and a search bar.

You can use Custom HTML not only to customize and adjust the layout of your theme but also to include custom functionality using JavaScript/jQuery.

To modify any of your HTML:

1. Go to **Settings > Style**.
2. In the **Customize HTML, CSS, and JS** section, select **Custom HTML**.
3. Use the **Select HTML section to edit** dropdown to view the various hTML templates.
4. For most changes, use **Update Preview** to see how your changes look in the Preview Pane above.
5. Be sure to **Save** your changes to make them available live.

The available Custom HTML templates are:

- **Body:** HTML in here loads on most pages in your knowledge base. It "surrounds" every article and category page of your knowledge base, as well as your homepage.
- **Top Navigation:** This HTML makes up your header, and appears on all article and category pages, as well

as your homepage. This also includes some aspects of your table of contents.

- **Article:** This HTML governs how your articles are laid out.
- **Homepage:** This is your homepage HTML. This "surrounds" the content from the **Homepage** custom content in the upper left navigation.
- **Login:** If you restrict your knowledge base to readers, this page is what readers see when they try to log in to your knowledge base. The Body and Top Navigation HTML does not display here.
- **404 Error Page:** This is what your readers see when they've accessed a page that does not exist. The Body and Top Navigation HTML does not display here.
- **Restricted Access Page:** This is what your readers see when they've attempted to load a page they don't have access to.
- **Right Column:** This is the HTML that governs your right column, if you have a right column set up in your Layout settings.

If you've edited your Custom HTML and you want to get back to a "clean" or default state, check out Default HTML to see what it used to look like!

Custom CSS

To modify your CSS:

1. Go to **Settings > Style**.
2. In the **Customize HTML, CSS, and JS** section, select **Custom CSS**. The CSS here is loaded on every single page of your knowledge base, so you don't need to have different rules for different page types.
3. For most changes, use **Update Preview** to see how your changes look in the Preview Pane above.
4. Be sure to **Save** your changes to make them available live.

If you're using one of our contextual help widgets (such as Widget 2.0 or Modern), add CSS for the widgets themselves in **Settings > Widget**.

Custom Head

You can also modify your `<head>` tag in **Settings > Style** by opening the Custom Head tab. This can be a good place to load external stylesheets, scripts, or third-party tool tracking codes. Refer to Access to the Header via Custom Head for more information.

Add a link to the upper right (top navigation)

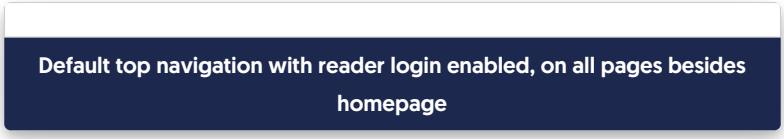
Last Modified on 08/21/2024 1:55 pm EDT

By default, your knowledge base will include two items in your top navigation:

- A Contact Us link
- A Login/Logout link (if you have this option selected)

If you'd like to make changes to the text used for either of those links, use the Customize Text tool's Top Navigation section to update them.

On pages besides the homepage, you'll also see a search bar up there:



Default top navigation with reader login enabled, on all pages besides homepage

You can customize this top navigation a bit to add a link to your own help desk, company intranet, or to match links on your main website.

To do so:

1. Go to **Settings > Style**.
2. In the **Customize HTML, CSS, and JS** section, select **Custom HTML**.
3. In the **Select HTML section to edit** dropdown, select **Top Navigation**.
4. Scroll to the bottom of the HTML and find the `ul` with the `navbar-right` class, usually around row 25:

```
<div class="navbar-collapse collapse" id="navbar-collapse">
  [template("slideout-right-toggle")]
  <ul class="nav navbar-nav navbar-right">
    <li>[template("searchbar")]</li>
    <li>[template("contact")]</li>
    <li>[template("login")]</li>
  </ul>
</div>
```

5. Each of the list items here is one of the elements of your top navigation. The list items at the top will appear furthest to the left; the items at the bottom will appear furthest to the right. To add a list item, add appropriate HTML into the correct spot on the list. If you're adding a hyperlink and you don't have custom HTML or Custom CSS to explicitly style those links differently, add the `hg-header-link` class to the hyperlink so it displays the same size and color as your other top navigation links. If you have custom HTML or styles, you'll need to check those styles to add the appropriate classes. Here's some sample code for you to start with:

```
<li><a class="hg-header-link" href="https://www.knowledgeowl.com/terms-and-conditions" target="_blank">Ter
```

6. If you're using the sample code above, replace the href with the link you'd like. To open in a new tab, keep `target="_blank"` in the copied code. To open in the same tab, remove the target entirely.
7. You can **Update Preview** to see the new top navigation element in action.
8. Be sure to **Save** once you've gotten the link to look how you'd like.

Here, I've added a hyperlink to our terms and conditions. Notice that it uses the hg-header-link class:

```
<div class="navbar-collapse collapse" id="navbar-collapse">

   <ul class="nav navbar-nav navbar-right">
      <li></li>
      <li><a class="hg-header-link" href="https://www.knowledgeowl.com/terms-and-conditions" target="_blank">Terr
      <li></li>
      <li></li>
   </ul>
</div>
```

And here's how it looks in my knowledge base:



Undo changes to Settings > Style

Last Modified on 08/21/2024 2:54 pm EDT

Sometimes, while trying out changes in our Look and Feel documentation or making other changes on the fly, you might suddenly get your knowledge base looking...not so great. Maybe you accidentally deleted something you needed, or you changed to a new color and you don't remember what was used before.

For these situations, you can rollback to a previous Style Setting save. To do so:

1. Select the **Revert to previous save** link in the upper left, below the Save button:



2. This will open the **Previous saves** modal, which displays the date and timestamp of the current active save and a dropdown of available previous saves. We save a maximum of three previous saves. For each previous save, you'll see:
    - The date the change was made
    - The time of the save
    - The name of the author who saved those changes
3. Use the dropdown to select the previous save you'd like to revert to.
4. Then select **Revert**.



5. This will open a confirmation window letting you know it will instantly rollback Style settings to the previous save and asking if you want to continue. Once you've confirmed you've selected the correct previous save, select **OK** to proceed with reverting to that save.

> **Use only when ready**
> Once you select **OK**, the previous settings are instantly applied to your live knowledge base. (You don't tt need to **Save** for them to be applied.)

6. Your previous save's settings are now applied and live.

How many previous saves are available?

We will save the **three** most recent saves.

Which settings will be affected?

Reverting a previous change will rollback all changes to all settings available on this page. That includes:

- All of the style settings in the left menu (colors, fonts, logo, favicon, and so on)
- All Custom CSS
- All Custom HTML templates
- The Custom head

How quickly does the change take effect?

Once you select a previous save to revert to and confirm it, those settings will **immediately** replace the current Style Settings. You won't need to Save or make any other changes.

If I rollback to my oldest save, can I then "roll forward" to a more recent save?

Yes. Once you have reverted to a previous save, the other recent saves remain available, so if you rollback to the oldest save, you can still "roll forward" to the more recent saves.

Why don't I see a "Revert to previous save" link?

The link only appears once your Style Settings have been saved twice. Make some more changes and save again!

Who can rollback to a previous save?

Authors with the default Editor role can use this option.

If you're using custom roles, authors with the **Admin permission** to **Update style / theming** can revert to a previous save.

Breadcrumbs

Last Modified on 07/17/2024 10:33 am EDT

A breadcrumb is a navigation aid that helps readers understand where they are in your knowledge base, whether they opened a page from search or by navigating to it. Here's a sample:



In the screenshot above, the breadcrumbs show us that the page we're currently viewing is in the top-level **Write the docs** category, and the in the **Articles** subcategory. We can select any of these breadcrumbs to quickly navigate to one of those categories or back to the homepage. So if this page isn't exactly what we're looking for, we could hop up one level and browse around to try to find related content.

Besides being a useful navigation aid, breadcrumbs also help your readers learn your knowledge base's organization and content hierarchy.

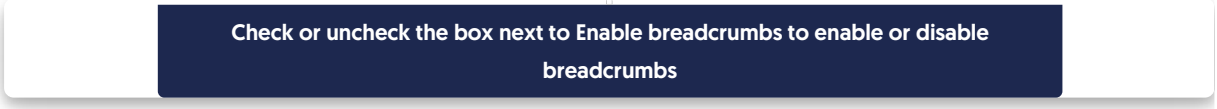
When breadcrumbs are enabled, all categories and subcategories will be displayed in breadcrumbs unless they have been hidden from both the table of contents and the homepage / parent category landing page.

> Categories with both the "Hide from table of contents" and the "Hide from homepage / parent category landing page" boxes checked will **not** show in breadcrumbs. See Hide a category from navigation for more information.

Enable or disable breadcrumbs

New knowledge bases automatically have breadcrumbs enabled. If you need to enable or disable breadcrumbs:

1. Go to **Settings** > **Basic**.
2. In the **Website Settings** section, find the **Navigation** heading.
3. Check the box next to **Enable breadcrumbs** enable breadcrumbs or uncheck it to disable breadcrumbs.



4. Be sure to **Save** your changes.

If you'd like to replace the word "Home" in your breadcrumbs, you can use the Table of Contents section of the Customize Text tool to update it.

Access to the header via Custom Head

Last Modified on 08/21/2024 3:14 pm EDT

If you're looking to add any integrations to your knowledge base, **Custom <head>** is a powerful tool to help you customize your knowledge base.

You can access it using these steps:

1. Go to **Settings** > **Style**.
2. In the **Customize HTML, CSS, and JS** section, select **Custom <head>**.
3. Paste in any scripts, stylesheets, font files, etc., that may need to be loaded in your knowledge base.
4. Be sure to **Save** your changes.

Here are some of the reasons you might need to use your Custom <head>:

Script or stylesheet references

Some customizations require adding a script and/or a CSS stylesheet for the integration to work properly; these can be added directly into the Custom <head>. For example, adding an external syntax highlighter requires you to add both a .js script and a .css stylesheet.

If your organization already has stylesheets that you'd like to reference here, you can also load them straight into the Custom <head>.

Third-party analytics/tracking tools

Third-party analytics tools like Google Analytics and Plausible or heat map tools like Hotjar typically require a script be added to the Custom <head>. Follow these tools' instructions on what script to add to your knowledge base and, if it needs to be added to the Custom <head>, you have the power to do that!

Refer to Analytics for more info on getting started with these types of tools. 😉

Favicon

You don't need to touch the Custom <head> to add a favicon! You can add it directly using **Favicon** option in the left menu. Refer to Change your favicon for more detailed instructions.

Reset your theme

Last Modified on 08/28/2024 5:26 pm EDT

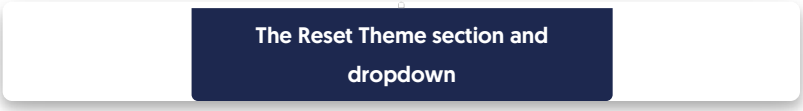
Sometimes, whether due to testing or experiments (or just due to an unfortunate copy and paste), you might want to undo changes to your Style Settings to take your theme back to a happier, more pristine time.

One way to do this is to rollback to a previous save.

But if you'd like to go back to our default initial theme (or you have an older knowledge base and you'd like to use our newest default theme), you can reset your theme to the "initial" default, which copies our current, beautiful default theme. Call it the blank slate option. 😉

To reset your theme:

1. Go to **Settings > Style**.
2. In the left menu, select **Reset Theme** to expand the section.
3. Select the **Reset to default or use settings from another knowledge base** dropdown.



4. In the **Themes** section, select **Initial Settings - Minimalist Theme**.
5. Select **Reset**.
6. A modal opens to confirm that you want to reset the current knowledge base to the initial settings. Select **OK** to complete the reset.

What is reset

The reset updates:

- Colors
- Fonts
- Logo
- Favicon
- All Custom CSS
- All Custom HTML
- The Custom <Head>
- All Colors

What isn't reset

There's only one element of the theme that doesn't get reset, and it generally only happens if you're resetting an older knowledge base. It depends whether the **Theme**, **Layout**, and **Table of contents** sections in the left

menu of Style Settings are shown or hidden:

- Older knowledge bases show the Theme and Layout sections, but don't show the Table of contents section.
- Newer knowledge bases don't show the Theme and Layout sections, but do show the Table of contents section.

If the knowledge base you're resetting shows the Theme and Layout sections and doesn't show the Table of contents section, your knowledge base will keep those settings even after the theme reset.

Our initial theme doesn't use those same settings, so once you perform this reset, contact us and one of our support owls can toggle the setting behind the scenes to show the Table of contents section and hide the Theme and Layout sections!

Copy a knowledge base's theme

Last Modified on 08/28/2024 5:27 pm EDT

If you have more than one knowledge base in your account, you can import a theme from another knowledge base using the **Reset Theme** option, the last section in the left menu:



This can be a fantastic timesaver if you have branding, colors, or other customizations that you don't want to painstakingly copy into a new knowledge base.

To use this option:

1. Go to **Settings** > **Style**.
2. In the left menu, select **Reset Theme** to expand the section.
3. Select the **Reset to default or use settings from another knowledge base** dropdown.
4. In the **Knowledge Bases** section, select the knowledge base whose theme you'd like to copy.
5. Select **Reset**.
6. A modal opens to confirm that you want to reset the current knowledge base with the other knowledge base's theme. Select **OK** to complete the reset.

What is reset

The reset updates:

- Colors
- Fonts
- Logo
- Favicon
- All Custom CSS
- All Custom HTML
- The Custom <Head>
- All Colors

What isn't reset

There's only one element of the theme that doesn't get reset, and that's whether the **Theme**, **Layout**, and **Table of contents** sections in the left menu of Style Settings are shown or hidden.

- Older knowledge bases show the Theme and Layout sections, but don't show the Table of contents section.

- Newer knowledge bases don't show the Theme and Layout sections, but do show the Table of contents section.

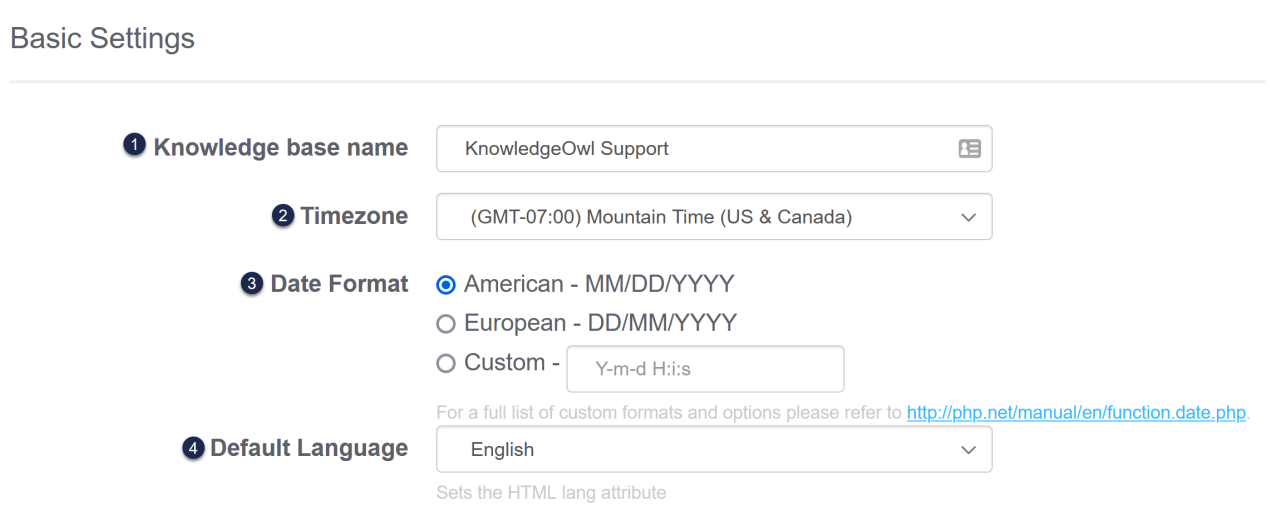
If the reset knowledge base and the source knowledge base don't both show the same sections, the reset knowledge base defaults to showing the Theme and Layout sections and not showing the Table of contents section.

If you need to enable or disable the Table of contents section after performing a reset, contact us and one of our support owls can toggle the setting behind the scenes that enables that section!

Basic Settings

Last Modified on 07/10/2024 4:41 pm EDT

The Basic Settings section of Settings > Basic contains settings to control your knowledge base's overall format for language and dates/times:



1. **Knowledge base name:** This name is what we use for the display everywhere within app.knowledgeowl.com, including:
    - On the dashboard tiles when you first log in to app.knowledgeowl.com
    - In the knowledge base selector in the top navigation of app.knowledgeowl.com
    - In reader and author knowledge base / site access lists
    - If you make changes to the knowledge base name, this should automatically update the "Welcome to {knowledge base name}" displayed on your homepage. You can change or remove that text without having to rename your knowledge base.

2. **Timezone:** This timezone is what we'll use for all date/timestamps within app.knowledgeowl.com and within your live knowledge base.

3. **Date Format:** The date format you select here is how we'll display date/timestamps within app.knowledgeowl.com and within your live knowledge base. Options include:
    - **American:** MM/DD/YYYY format (so July 23, 2022 displays as: 07/23/2022)
    - **European:** DD/MM/YYYY format (so July 23, 2022 displays as: 23/07/2022)
    - **Custom:** You can use PHP custom formats tto define your own custom date/time format. See some samples with their output in the official PHP documentation, in the date() Formatting section.
        - For example, to use a format of YYYY-MM-DD, use: `Y-m-d`

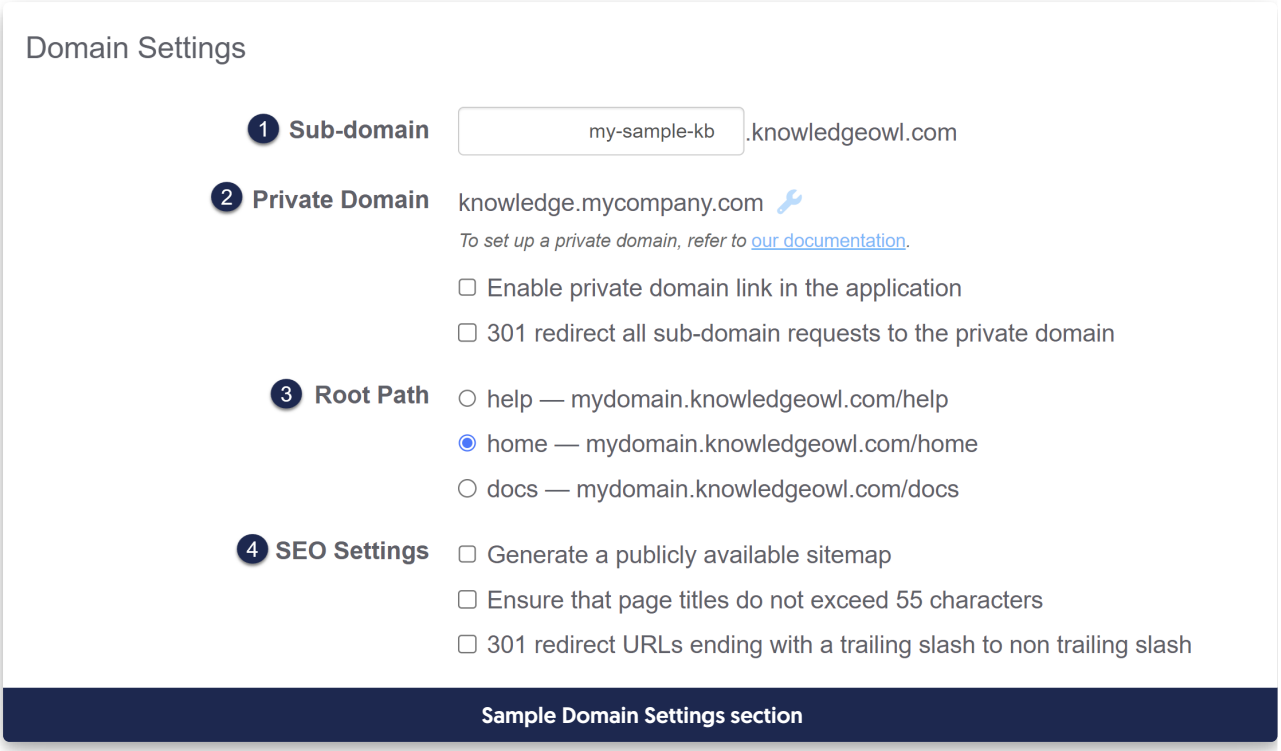
- Or, to use MM.DD.YY, use `m.d.y`

4. **Default Language**: The language selected here sets the underlying HTML "lang" attribute, which helps screen readers know what the primary language you're using is. This is a must for knowledge bases with accessibility requirements, but an all-around best practice, too.
5. If you make any changes to this section, be sure you **Save** them!

Domain Settings

Last Modified on 05/29/2024 5:28 pm EDT

The Domain Settings section of Settings > Basic contains settings to configure your KnowledgeOwl subdomain and/or private domain. It also includes some high-level SEO settings:



Sample Domain Settings section

1. **Sub-domain: This is the KnowledgeOwl subdomain used for your knowledge base. You set this up when you first created the knowledge base, but you can change it any time. In the screenshot above, this is set to** `my-sample-kb.knowledgeowl.com` **.**

2. **Private Domain: If you'd like to use your own domain for your knowledge base, you configure it here. See Add a private domain for full instructions.**

    - **Enable private domain link in the application: By default, the "View KB", "View Article", and "View Category" links in app.knowledgeowl.com will open to your knowledge base's KnowledgeOwl subdomain. You can force these links to open to your private domain by checking this box. We recommend only using this setting once you've confirmed your private domain and SSL certificate are working properly.**

    - **301 redirect all sub-domain requests to the private domain: By default, you can use either the KnowledgeOwl subdomain or your private domain. If you'd like to redirect all use of your KnowledgeOwl subdomain to your private domain, check this box. We recommend only using this setting once you've confirmed your private domain and SSL certificate are working properly.**

3. **Root Path: All KnowledgeOwl knowledge bases are initially set up to direct to your KnowledgeOwl**

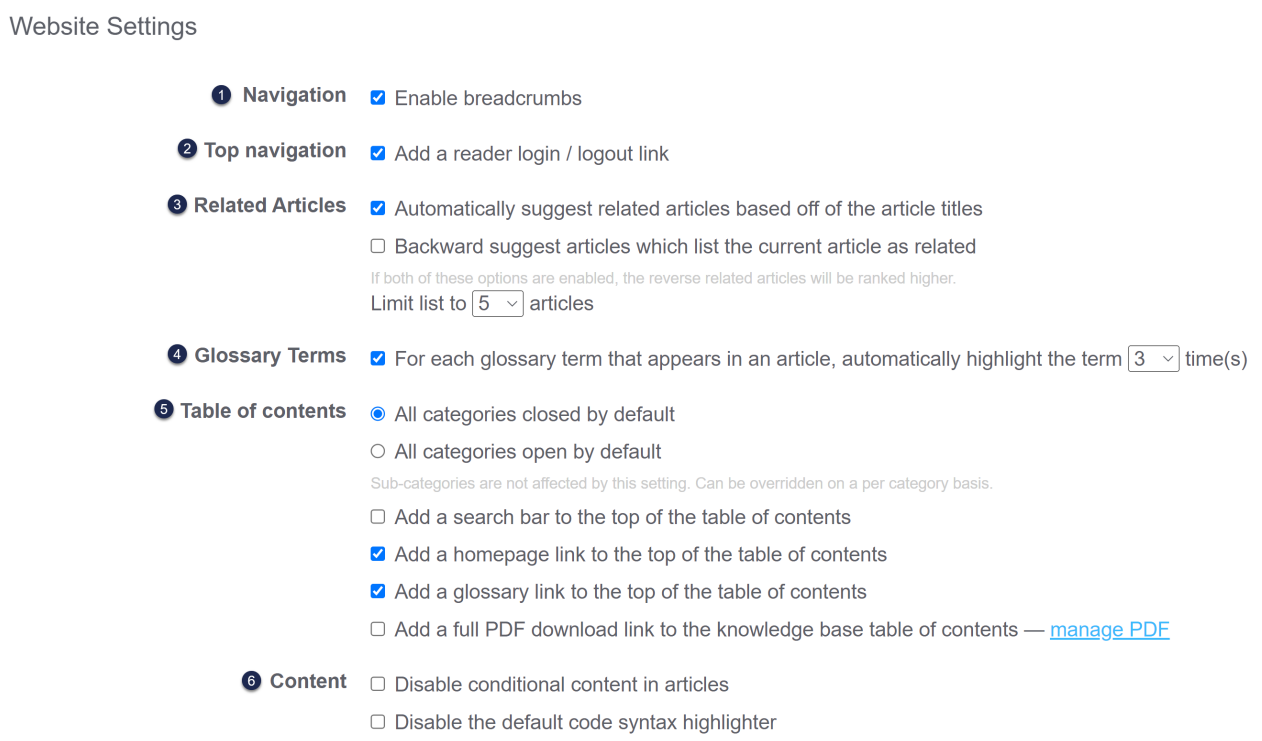
subdomain/help. You can choose from two other root paths: /home or /docs.

4. **SEO Settings**: These settings govern some general SEO behavior for your knowledge base.
    - **Generate a publicly available sitemap**: If any part of your knowledge base is available without logging in, you will likely want to generate a publicly available sitemap to streamline search engines crawling your website. Check this box to enable that sitemap. See Generate your sitemap for more information.
    - **Ensure that page titles do not exceed 55 characters**: By default, KnowledgeOwl won't enforce this restriction for article or category titles, though it is considered an SEO best practice. If you'd like to enforce a 55-character limit for titles, check this box.
    - **301 redirect URLs ending with a trailing slash to non trailing slash**: In the land of search engine indexing, a trailing slash (such as https://support.knowledgeowl.com/help/seo-guide#best-practices/) is treated as a directory. The same URL without a trailing slash is treated as a file or page. Those two URLs are indexed and tracked separately by search engines, though, so if you have readers who have somehow bookmarked or typed in an article URL with a "/" at the end, their visits won't factor into SEO reports and algorithms in the same way. Forcing these trailing slash URLs to redirect to the normal article permalink maximizes your SEO. Check this box to enforce this behavior. See SEO best practices for more details.
5. If you make any changes to this section, be sure you **Save** them!

Website Settings

Last Modified on 05/29/2024 5:28 pm EDT

The Website Settings section of Settings > Basic controls some default behaviors for your knowledge base's Navigation, Top navigation, Related articles, Glossary terms, Table of contents, and some content display/formatting:



1. **Navigation**
    - **Enable breadcrumbs: Breadcrumbs are the navigation displayed at the top of a page to show which category or categories the page you're viewing is within. These are generally considered a web best practice. By default, your knowledge base will have breadcrumbs enabled, but if you'd like to disable them, uncheck this box. See Breadcrumbs for more information on how breadcrumbs work.**
2. **Top navigation**
    - **Add a reader login / logout link: If you're requiring a login to your knowledge base for people to access the content, you'll need to check this box to enable the reader login / logout link. See Enable reader logins for more information.**
3. **Related Articles: These settings control some behavior of the Related Articles section.**
    - **Automatically suggest related articles based off of the article titles: All knowledge bases include the ability to manually assign related articles. By default, we also check the box here to automatically suggest related articles based off of the article titles. If you'd like to turn off these automatic suggestions so that only manual suggestions are used, uncheck this box. See Enabling and disabling**

automatic suggestions for Related Articles for more information.

- **Backward suggest articles which list the current article as related:** This is another form of automatic related article relationships, which will create an automatic mirrored suggestion from a manually-created related article assignment. See bBackward suggest Related Articles for more information.

- **Limit list to xx articles:** By default, knowledge bases are set up to automatically display 5 related articles (this limit has no impact on manually-assigned related articles--we always display all of those). You can change this number from 1-10. See Set the number of Related Articles to automatically display for more information.

4. **Glossary Terms**
    - **For each glossary term that appears in an article, automatically highlight the term xx times:** This setting enables automatic glossary term highlighting in articles and lets you set how many occurrences of the term should be highlighted. For more information, see our Glossary documentation, especially Automatically highlight definitions in articles.

5. **Table of contents:** These settings control the default behavior of categories in the table of contents and adding/removing specific links to the table of contents.
    - **All categories closed by default / All categories open by default:** You can select only one of these two options. They determine categories' default behavior in the table of contents, whether categories should be open or closed by default. Individual categories also have controls where you can override this behavior. New knowledge bases will have the default set to closed. See Display categories open by default for more information.

    - **Add a search bar to the top of the table of contents:** You can opt to add a search bar to the top of your table of contents. See Add search bar to table of contents for more information.

    - **Add a homepage link to the top of the table of contents:** You can opt to show or hide a link to your knowledge base's homepage at the top of the table of contents. This link is included by default with new knowledge bases. See Add Home button to table of contents for more information. You can also edit the text for this link using the Table of Contents section of the Customize Text tool.

    - **Add a glossary link to the top of the table of contents:** You can opt to show or hide a link to your knowledge base's Glossary in the table of contents. This link is included by default with new knowledge bases. See Add glossary link to table of contents for more information. You can also edit the text for this link using the Table of Contents section of the Customize Text tool.

    - **Add a full PDF download link to the knowledge base table of contents:** If you are using our Standard PDF export (Full PDF Download), you can choose to include a link to that PDF in your table of contents. See Add a link to the full PDF download to table of contents for more information on this setting. You can also edit the text for this link using the Table of Contents section of the Customize Text tool.

6. **Content**
    - **Disable conditional content in articles:** This setting was for an older integration we had and is no longer used. We need to tidy up the interface to remove it, but you can ignore this setting for now!

    - **Disable the default code syntax highlighter:** If you're adding content in Code Blocks,

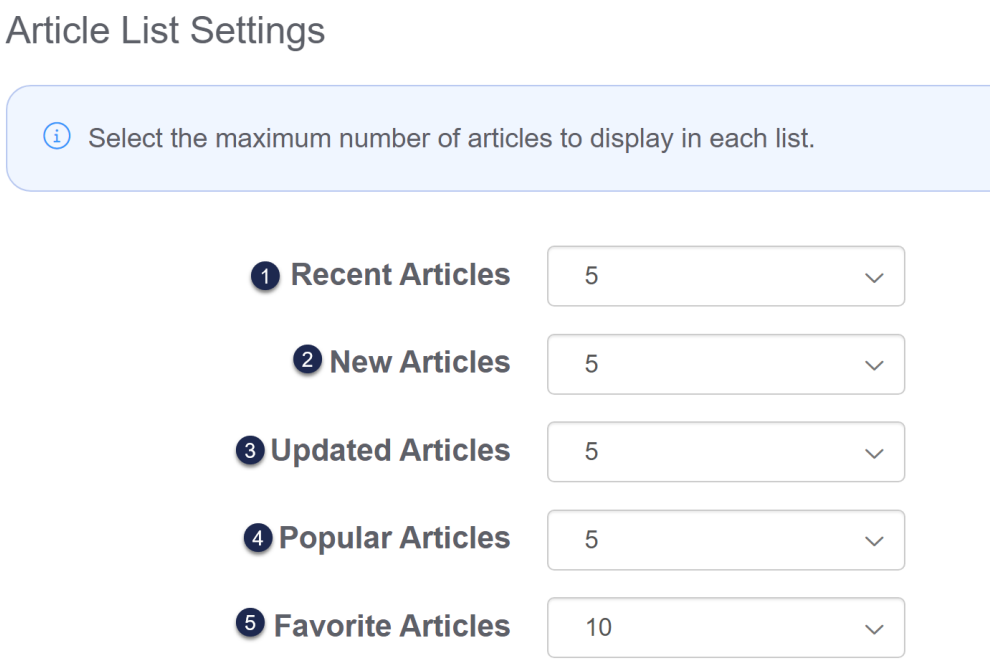
KnowledgeOwl has a default syntax highlighter to highlight that code based on the language you select. If you don't want to use the default syntax highlighter, you can disable it by checking this box. See Use your own syntax highlighter for code blocks for a sample set of instructions on using your own syntax highlighter (Prism is used in our example).

7. If you make any changes to this section, be sure you **Save** them!

Article List Settings

Last Modified on 05/29/2024 5:27 pm EDT

The Article List Settings section of Settings > Basic allows you to control how many articles are displayed in the various pre-built article lists we have available. You can select anywhere from 1-10. (Note that making a selection here doesn't automatically turn on the feature.)



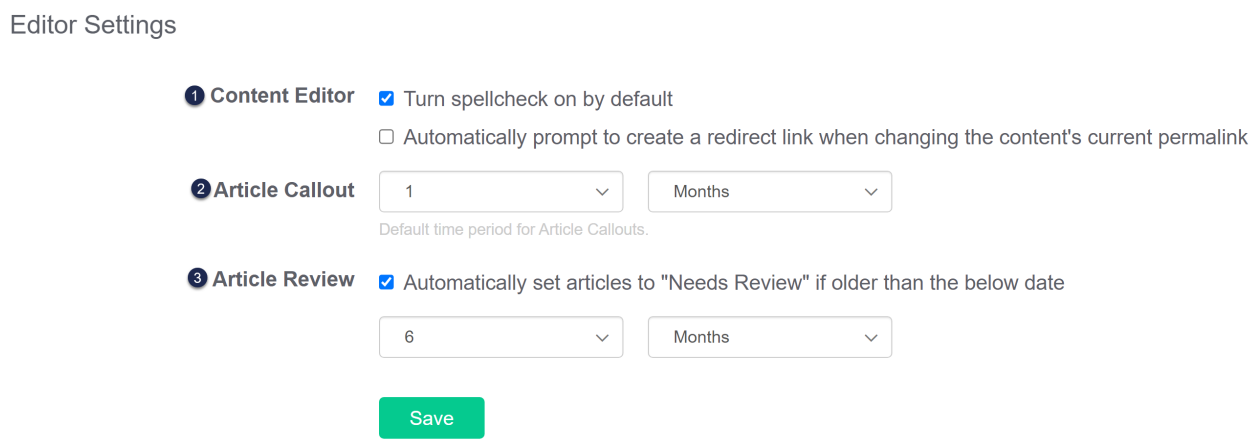
For more information on each list, see:

1. **Recent Articles: This article list is not included in any of our knowledge bases by default. For logged-in readers, it will display xx articles that the reader has most recently accessed.**
2. **New Articles: Shows the xx most recently published articles, sorted by create date. Prioritizes articles with the New article callout ahead of those without. This article list is included on the homepage of new knowledge bases by default, and in the righthand column of certain themes by default.**
3. **Updated Articles: Shows the xx most recently updated articles, sorted by last modified date. Prioritizes articles with the Updated article callout ahead of those without. This article list is included on the homepage of new knowledge bases by default, and in the righthand column of certain themes by default.**
4. **Popular Articles: Shows the xx most popular articles, determined by page views, mimicking the Popular Articles Report. This article list is included on the homepage of new knowledge bases by default, and in the righthand column of certain themes by default.**
5. **Favorite Articles: If Article Favorites is enabled for the knowledge base, this list will display to each reader their favorited articles.**
6. **If you make any changes to this section, be sure you Save them!**

Editor Settings

Last Modified on 05/29/2024 5:28 pm EDT

The Editor Settings section of Settings > Basic controls some of the default behavior for the article and category editors:



1. **Content Editor:**
    - **Turn spellcheck on by default:** This setting applies to the Legacy Editor only; Modern Editor automatically uses the browser's spellcheck. See SCAYT Spell Check for more information.
    - **Automatically prompt to create a redirect link when changing the content's current permalink:** With this setting turned on, any time you try to save an article after editing the permalink, the editor will ask if you want to save the previous permalink as an Old Link--automatically. (We love this feature!) See Automatically redirect when you update an article's URL for more information. This box is checked by default for all new knowledge bases created after July 2023.
2. **Article Callout:** When the New and Updated callouts are used, this setting determines their default length to automatically set an expiration date. The default can be manually overwritten in individual articles. Use the two dropdown controls to set your desired duration, from 1 day all the way up to 12 months.
3. **Article Review:**
    - **Automatically set articles to "Needs Review" if older than the below date:** This setting will automatically change articles' publishing status from Published to Needs Review if they haven't been modified for the selected time interval.
    - Articles in Needs Review status appear just like Published articles to your readers, but received a different status callout in the Articles display in-app and can be viewed in their own filter in Manage Articles.
    - KnowledgeOwl runs a scheduled job each night to set these, so you'll see statuses update as a result of this roughly once a day.

- Use the two dropdown controls to set the time period you'd like to use, anywhere from 1 day to 12 years.

4. If you make any changes to this section, be sure you **Save** them!

Private domain overview

Last Modified on 05/29/2024 5:28 pm EDT

Each knowledge base has its own unique KnowledgeOwl subdomain, like ours is "support.knowledgeowl.com". Your subdomain can be customized under **Settings > Basic**, in the Domain Settings section.

You can also set up a private domain (your own custom URL with no reference to KnowledgeOwl) and point that to your KnowledgeOwl subdomain. You or your webmaster will need to add a CNAME record for your subdomain. Once created, the private domain may take up to 24 hours to be fully synced.

If your private domain uses https:, you can use our integration with Let's Encrypt to provide an automatically renewed SSL cert for your knowledge base, too!

Here's the overall process:

1. Have your webmaster set up a CNAME record that points your private domain (such as help.mycompany.com) to your KnowledgeOwl subdomain shown on Settings > Basic (such as mycompany.knowledgeowl.com).
2. In **Settings > Basic**, add the private domain.
3. Once the private domain has synced, generate a Let's Encrypt SSL certificate. The domain can take up to 24 hours to sync, but usually it completes in a few minutes.
4. Once you've confirmed the private domain and SSL cert are all working properly, check a couple boxes to ensure that all requests use your private domain, rather than the subdomain.
5. If you're using features that leverage reCAPTCHA, add a reCAPTCHA key.

See below for more detailed information on each step and how to troubleshoot errors you might run into.

Create a CNAME record on your DNS

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You will need to have your webmaster create a CNAME entry on your DNS that points your private domain to the KnowledgeOwl subdomain you use in **Settings > Basic**.

Example: help.mycompany.com CNAME record pointing to mycompany.knowledgeowl.com

Add a private domain

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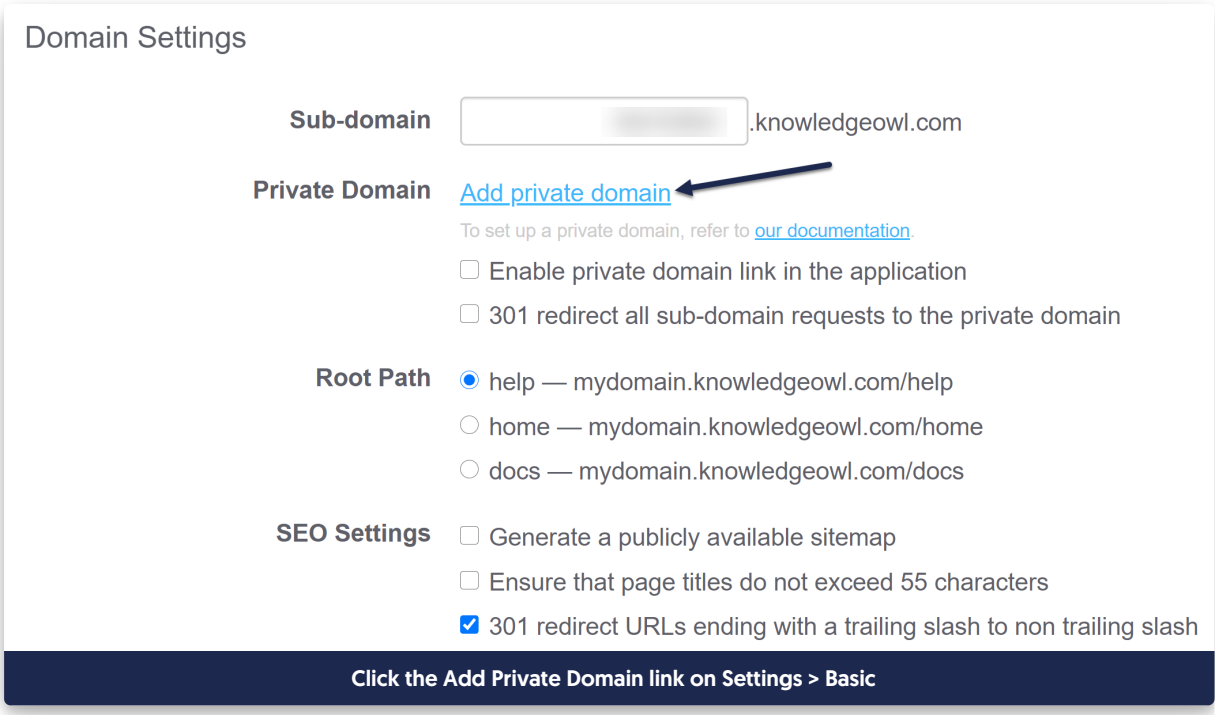
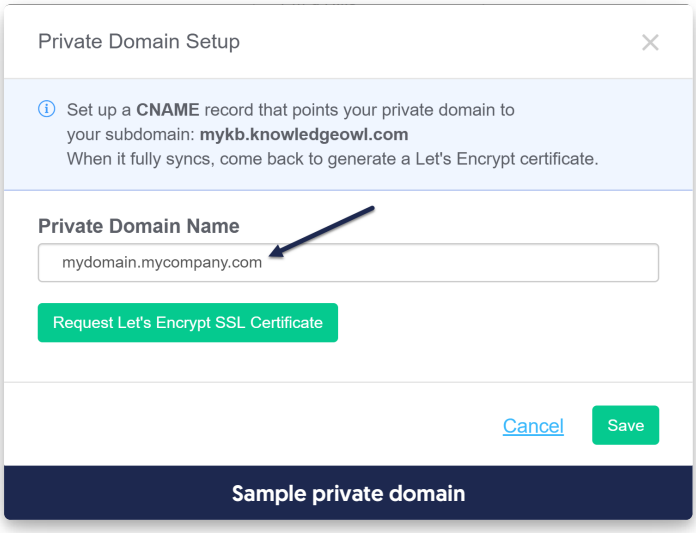
Once your webmaster has created a CNAME record to handle the relationship between your private domain and your KnowledgeOwl subdomain, you can add your private domain:

1. **Go to Settings > Basic.**
2. **Click the Add private domain link next to Private Domain**



3. **This will open a Private Domain Setup popup. Enter the URL you'd like to use for your private domain. You can save at this point, but you'll also need to add an SSL certificate.**



Set up your SSL cert

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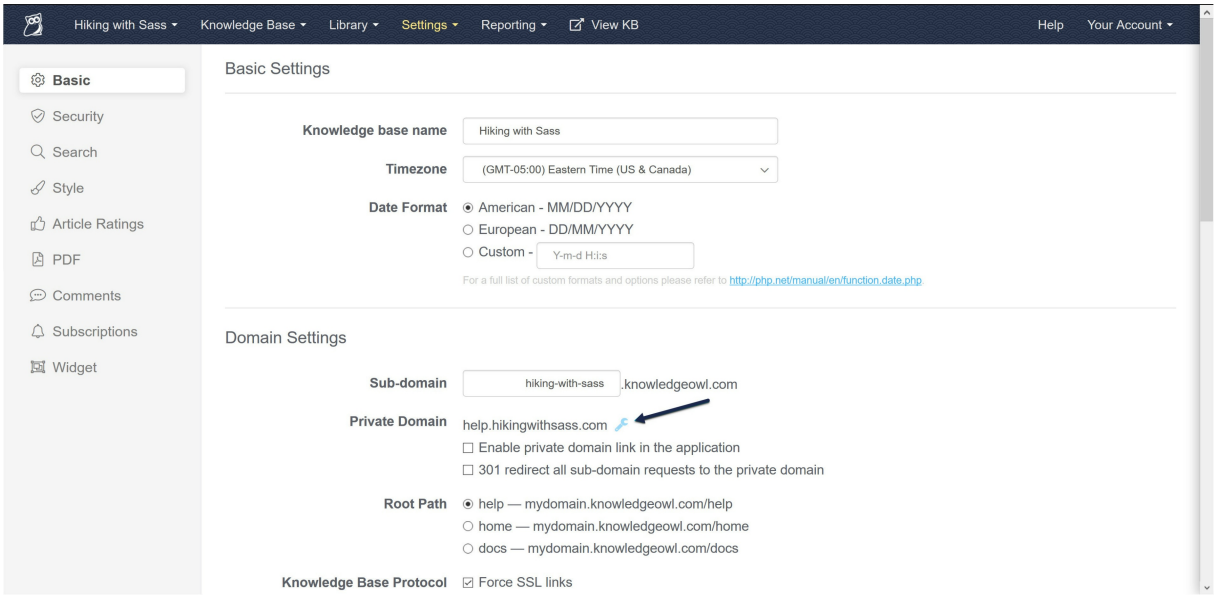
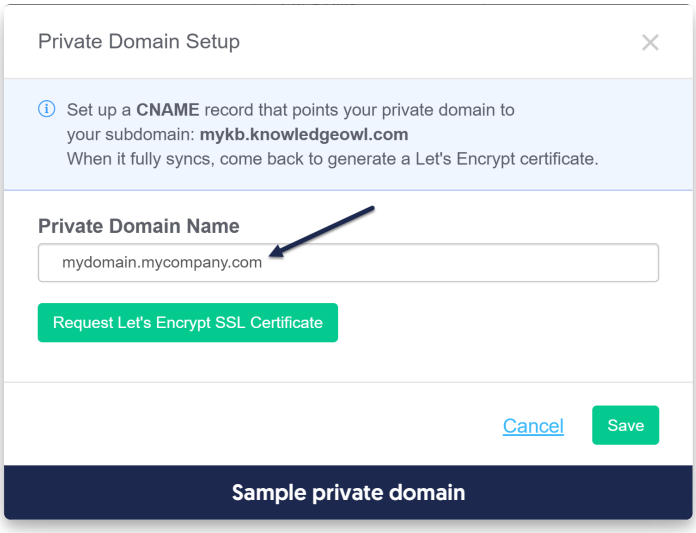
If your private domain uses https: (most do, and it's a security best practice), you'll need to set up an SSL certificate. For your convenience, we have an integration with Let's Encrypt to set up an autorenewing certificate at no cost to you.

Don't want to use a Let's Encrypt SSL certificate? For our Business and Enterprise-level customers, we can upload your own SSL cert directly for you. If you are in one of these subscription tiers and want to use your own SSL cert, contact us for more info.

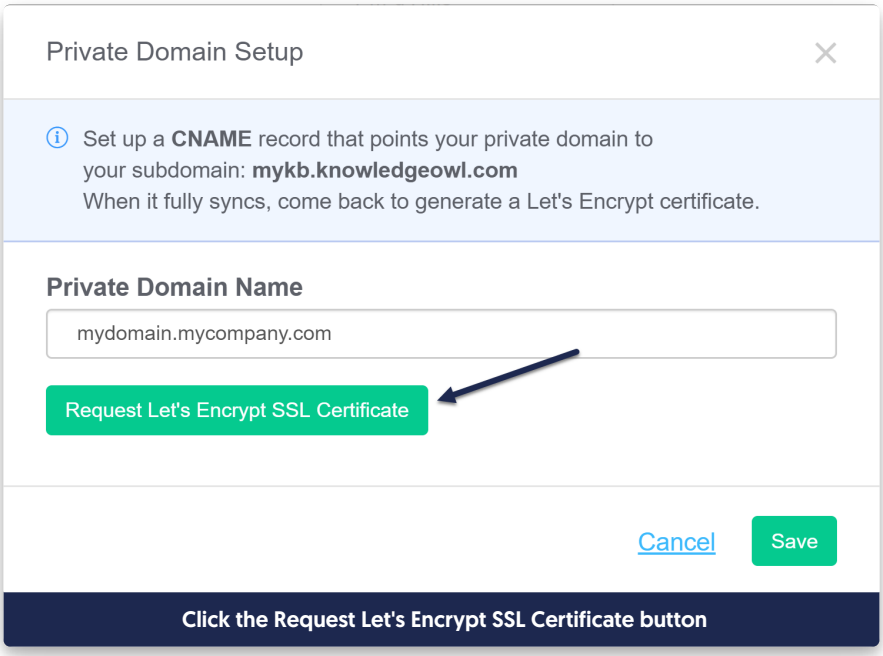
1. Go to **Settings > Basic.**
2. Click the wrench icon next to your private domain (or just continue from adding it in the previous steps!)



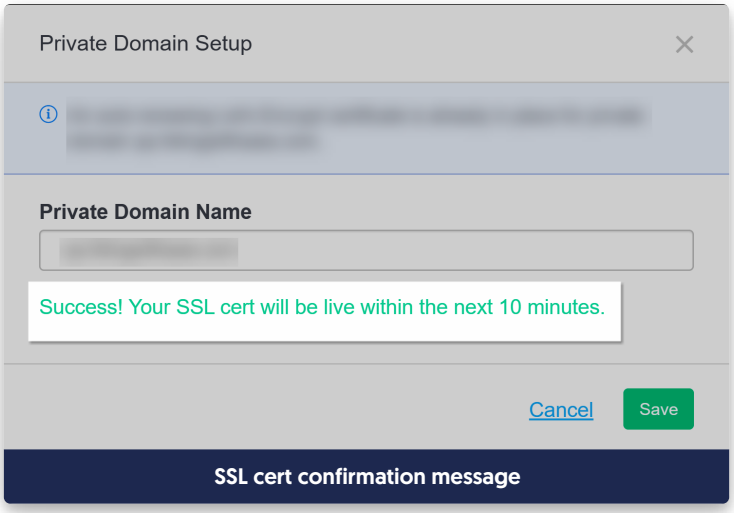
3. This will open a Private Domain Setup popup.



4. **Click the Request Let's Encrypt SSL Certificate button to set up an autorenewing certificate through Let's Encrypt.**



5. **If your CNAME record is properly formatted and has synced, you should see this success message:**

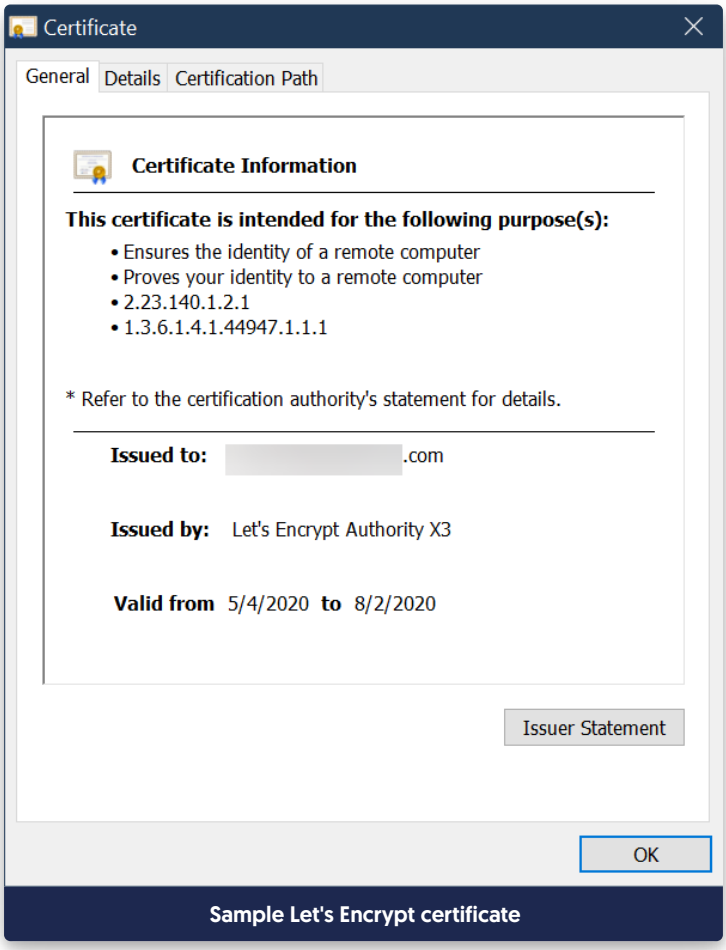


If you get an error message, click here to troubleshoot:

- SSL cert troubleshooting: CNAME record has not fully synced
- SSL cert troubleshooting: CAA conflict

6. Click **Save**.

The certificate should appear on your knowledge base within the next 10 minutes. Most browsers let you you click the security icon to view the certificate. If this certificate has been applied, you'll see details for a Let's Encrypt Authority X3 certificate, similar to this:



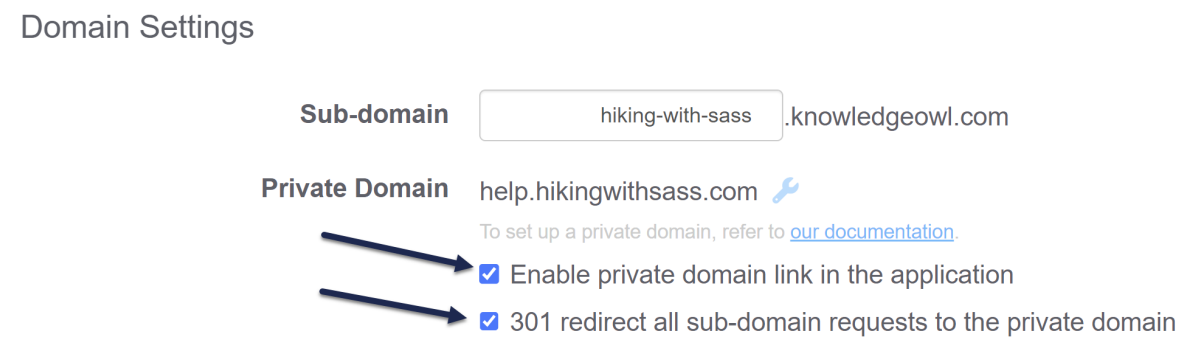
Sample Let's Encrypt certificate

Make all requests use your new private domain

Last Modified on 05/29/2024 5:28 pm EDT

When your private domain is set up and your SSL cert is working correctly, try navigating to your private domain and confirm your knowledge base is loading.

Once you've confirmed that, we recommend making two additional changes, both in Settings > Basic in the Domain Settings section, directly underneath your private domain:



1. **Check the box next to Enable private domain link in the application. This will ensure that any time one of your authors clicks the View KB button in the top navigation or the View Article/View Category link in the editor, they are taken to the private domain, not your KO subdomain.**

2. **Check the box next to 301 redirect all sub-domain requests to the private domain. This will ensure that if anyone does have your KO subdomain link, they'll be redirected to the private domain. This setting also ensures that any pages of your knowledge base which are publicly available will only be indexed by Google or other search engines under the private domain, not the KO subdomain.**

3. **Be sure to Save your changes!**

Add reCAPTCHA

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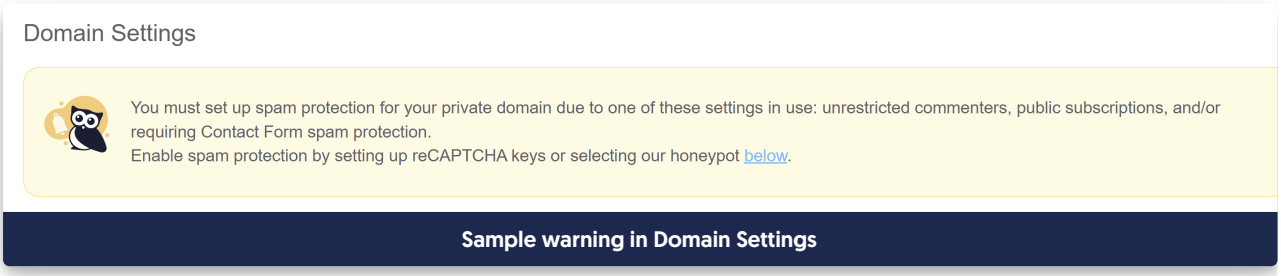
If you've selected to use reCAPTCHA as your spam protection and set up certain features in specific ways, you may also need to add reCAPTCHA once you've added a private domain.

If you do, you'll see a warning in the Domain Settings section after you've saved your private domain settings:



Sample warning in Domain Settings

You can add the reCAPTCHA Key and Secret further below in the **Spam Protection Settings** section.

If you're using honeypot spam protection, you won't need to do anything extra.

If you're using reCAPTCHA spam protection with a KnowledgeOwl subdomain (such as my-amazing-kb.knowledgeowl.com), you don't need to configure your own reCAPTCHA.

However, if you're using reCAPTCHA spam protection and you've customized your knowledge base to use your own private domain, such as www.mykb.mycompany.com, you'll need to add your own reCAPTCHA to your site if you have any of these options enabled:

- **Settings > Comments:** The "Only allow logged in readers and authors to leave comments" box is unchecked (e.g. you allow unrestricted commenters)
- **Settings > Subscriptions:** The "Enable public subscriptions" box is checked (e.g. you allow public subscriptions)
- **Contact Form:** The "Use spam protection on ticket submissions" box is checked
    - If you are using this setting and also using Contextual Help Widget (2.0), you'll also need to add a V3 reCAPTCHA to add reCAPTCHA to the Contact tab on the Widget.
    - If you are using this setting and don't have reCAPTCHA enabled, your contact form will display an invalid domain error to your end-readers.

What is reCAPTCHA?

reCAPTCHA is a free service from Google that helps prevent spam activity in your knowledge base.

It's designed to verify that someone signing up for a subscription is a real person and not a bot. A "CAPTCHA" is a simple test--usually a task that is very easy for a human to perform, but hard for bots and other malicious software to figure out. There are two versions of reCAPTCHA:

- v2: Verify requests with a challenge. Example: checking a box next to "I am not a robot."
- v3: Verify requests with a score. Example: click on all the images that have cars in them.

KnowledgeOwl currently supports specific versions in specific places:

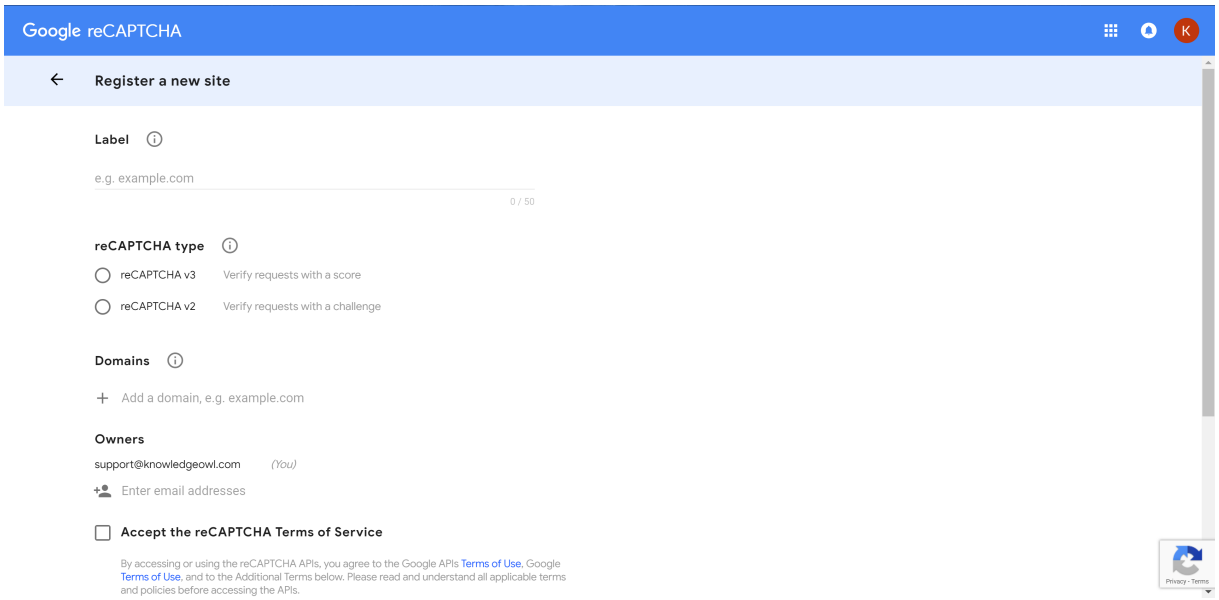
- v2: Supported in the full knowledge base; not supported in Contextual Help Widget (2.0). For these reCAPTCHAs, configurations with "I am not a robot" reCAPTCHAs, and you can see one in action if you try to subscribe to a category in this knowledge base.
- v3: Supported in Contextual Help Widget (2.0); not supported in the full knowledge base.

Only v2 reCAPTCHAs will work properly in your main knowledge base. We've tested our configurations with "I am not a robot" reCAPTCHAs, and you can see one in action if you try to subscribe to a category in this knowledge base!

Creating a new reCAPTCHA

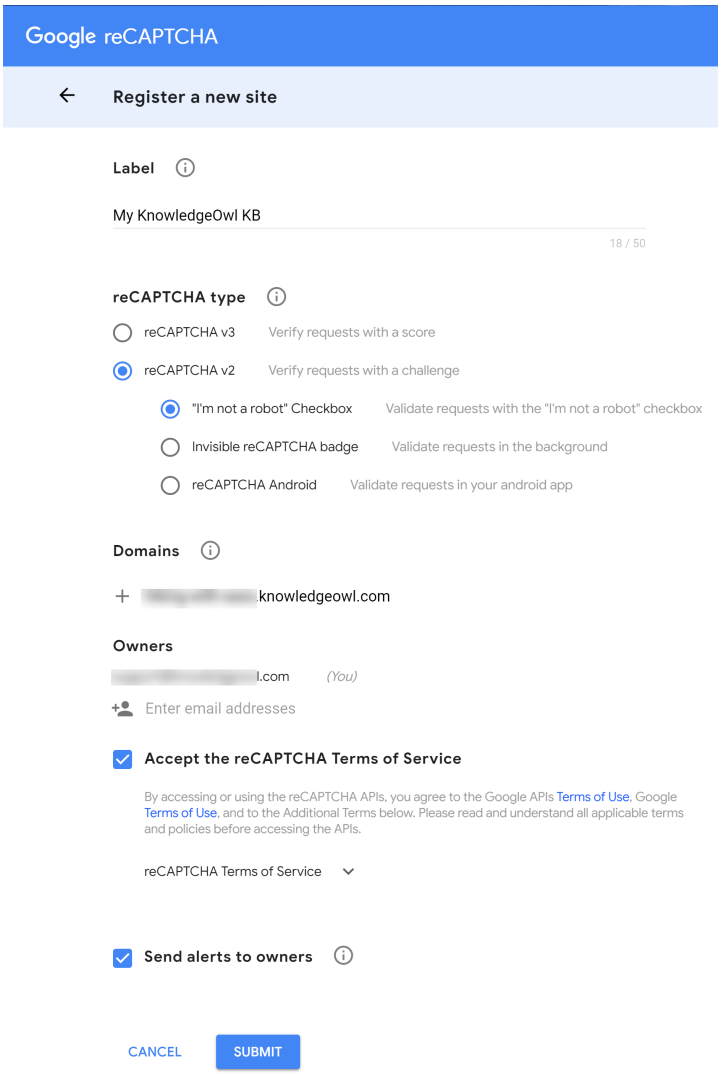
To create a new reCAPTCHA, you'll need a Google account.

1. Go to https://www.google.com/recaptcha/admin
2. If you've never generated a reCAPTCHA before, this should take you directly into the page to create one. If you've generated a reCAPTCHA before, you'll need to click the + in the upper right to Create a new reCAPTCHA.



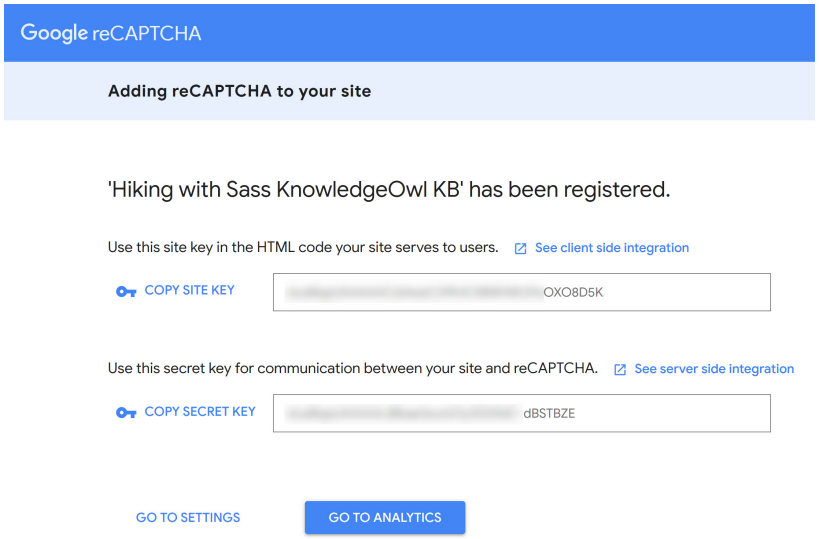
3. Pick a **label** for your reCAPTCHA. You might use the name of your knowledge base or the URL for it.
4. Select the **reCAPTCHA type**:
    - For use in your overall knowledge base, use reCAPTCHA v2. The "I'm not a robot" checkboxes work well.
    - For use in Contextual Help Widget (2.0) Contact Form, use reCAPTCHA v3. See Protect Widget 2.0 Contact Form with reCAPTCHA for more information.
5. For **domain**, use the URL of your KnowledgeOwl knowledge base.
6. Your Gmail account will automatically be added as an **Owner**. You can add additional email addresses. If you'd like us to be able to help troubleshoot issues with your reCAPTCHA, add support@knowledgeowl.com as an owner.
7. You'll need to check the box next to **Accept the reCAPTCHA Terms of Service**.

8. **You can choose to receive or opt out of alerts to owners. These alerts will notify you if Google detects problems with your site, such as misconfigurations affecting the reCAPTCHA or increases in suspicious traffic. We recommended receiving the alerts.**
   So a completed v2 reCAPTCHA might look something like this:



9. **Once you've entered all your selections, click Submit.**

10. **This will take you to a confirmation screen that will provide you with the Site Key and the Secret Key for your reCAPTCHA.**

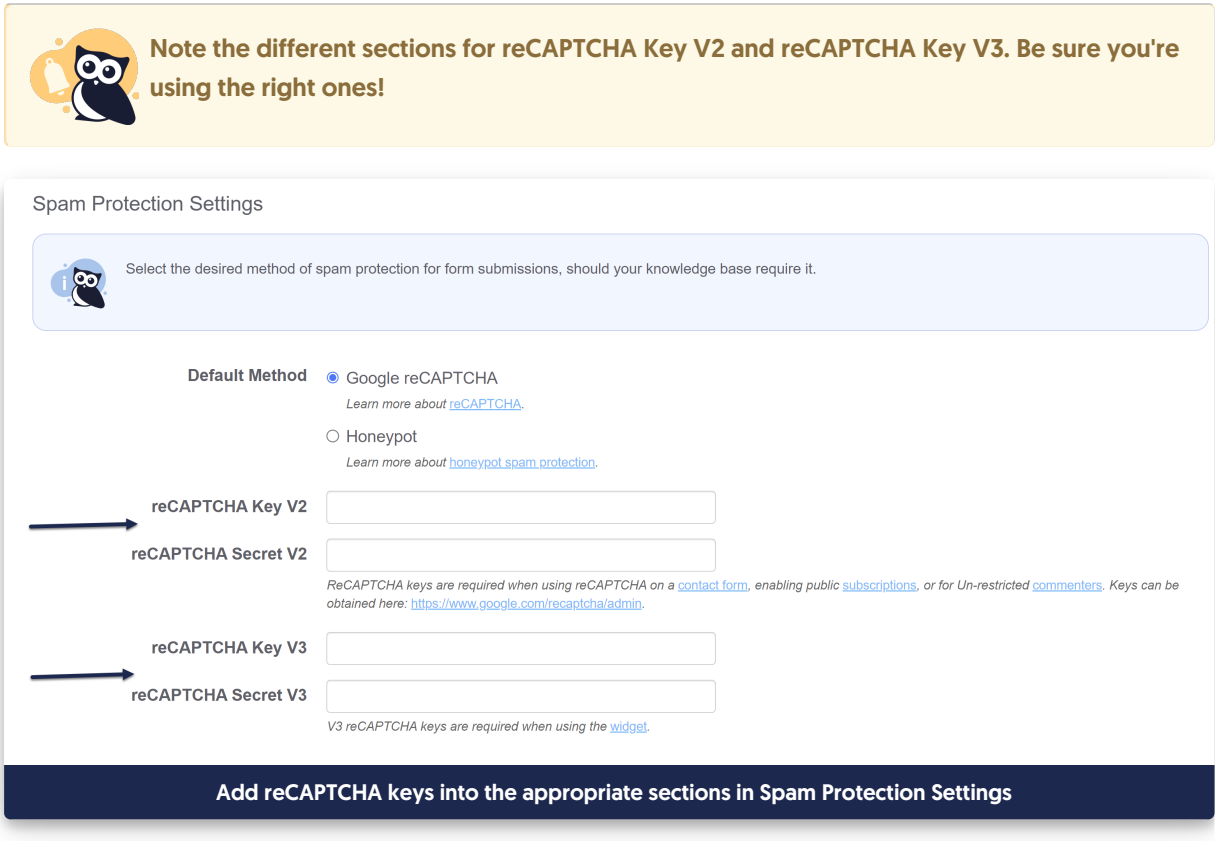


You'll need these to add them to your knowledge base!

Add your reCAPTCHA to your knowledge base

With your reCAPTCHA generated, you can add the site key and secret key to your knowledge base. To do so:

1. **Go to Settings > Basic.**
2. **In Spam Protection Settings, copy and paste your reCAPTCHA site key and secret key from Google into the appropriate fields here.**

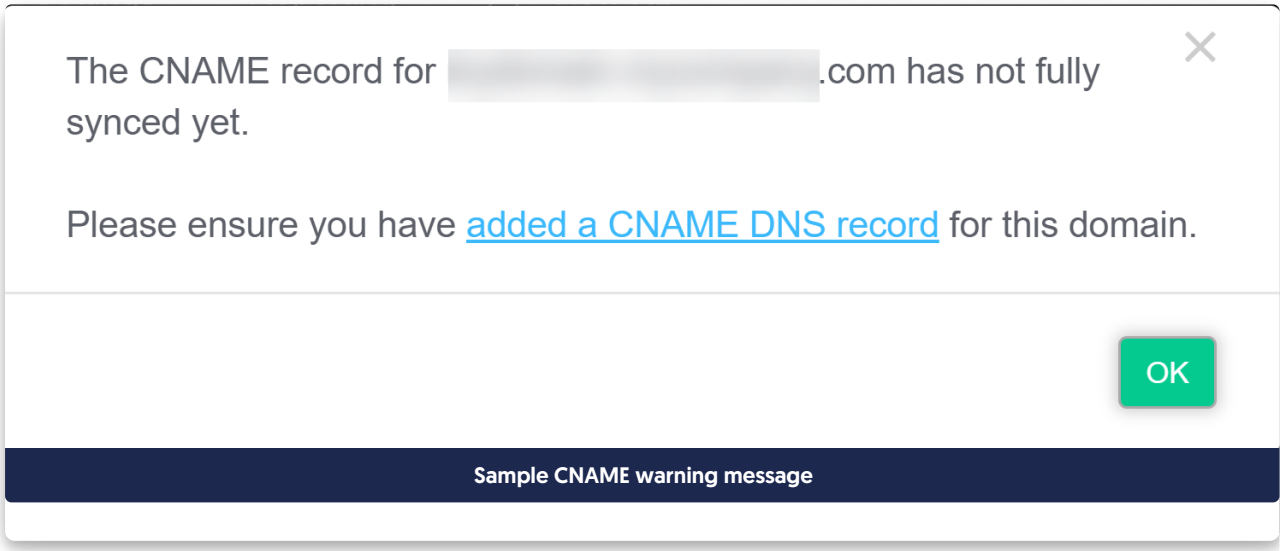


3. **When you're done making changes, click Save.**

SSL cert troubleshooting: CNAME record has not fully synced

Last Modified on 05/29/2024 5:28 pm EDT

If your CNAME record hasn't been created yet, was just created and hasn't synced, or was improperly formatted, you might see this message:



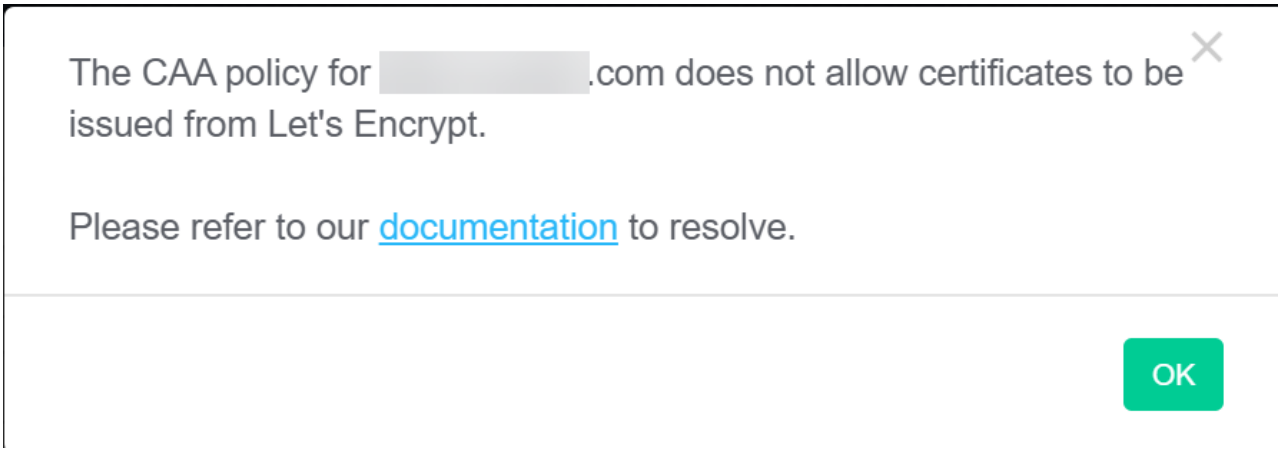
Sample CNAME warning message

If you see this message, you may need to create or update your CNAME record, or just wait a few more minutes for it to sync.

SSL cert troubleshooting: CAA policy does not allow

Last Modified on 05/29/2024 5:28 pm EDT

You may see a warning about a CAA policy not allowing certificates to be issued from Let's Encrypt:



Certificate Authority Authorization (CAA) records and policies determine which authorities are allowed to issue certificates for a given domain. If you see this warning, it means that it looks like your domain has a CAA which does not include Let's Encrypt as a valid authority.

To fix this error, contact your IT department/network admin and ask them to add `letsencrypt.org` to the current CAA policy or record. Once they've added Let's Encrypt as an authorized authority, come back and request the SSL cert again.

Changing your private domain

Last Modified on 05/29/2024 5:27 pm EDT

If your company rebrands or changes up their website, you may need to change the private domain associated with your knowledge base. When you change your knowledge base's private domain, this will break links to your previous private domain.

To avoid breaking any existing bookmarks or links, you or your webmaster can set up a redirect in your domain registrar account to forward your previous private domain to your new private domain. That way, anyone visiting a link using the old domain will be forwarded to the right place.

Here are the basic steps for changing your private domain:

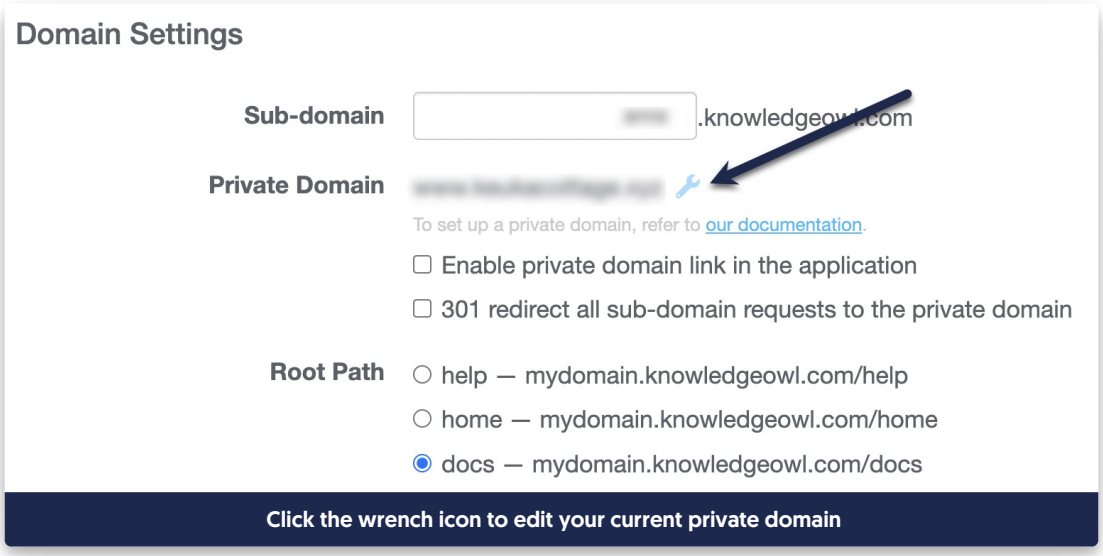
1. Have your webmaster create a CNAME record in the DNS settings for your new domain that points the new domain to your KnowledgeOwl subdomain shown in **Settings > Basic**.
   Example: help.mycompany.com CNAME record pointing to mycompany.knowledgeowl.com

2. Have your webmaster set up a redirect from your previous private domain to your new private domain.
   Example: redirect helpcenter.mycompany.com (your old private domain) to help.mycompany.com (your new private domain)

3. In the DNS settings for your previous private domain, have your webmaster remove the CNAME record that was pointing that domain to your KnowledgeOwl subdomain.

4. In your KnowledgeOwl account, navigate to **Settings > Basic**.

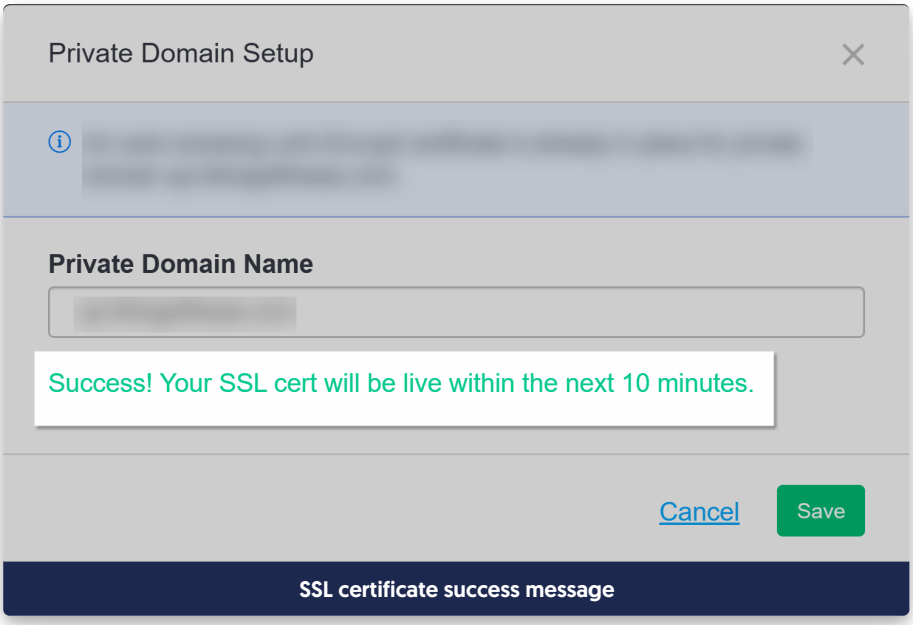
5. Click the wrench icon next to your current private domain.



6. In the Private Domain Name field, replace the old private domain with your new private domain.

7. Click the **Request Let's Encrypt SSL Certificate button** to set up an autorenewing certificate through Let's Encrypt.

8. If your new CNAME record is properly formatted and has synced, you should see this success message:



9. Click **Save**.

Your knowledge base should now be using your new private domain and your SSL certificate will appear within the next 10 minutes. Any links to your old knowledge base private domain will redirect to the new domain.

About Fancybox

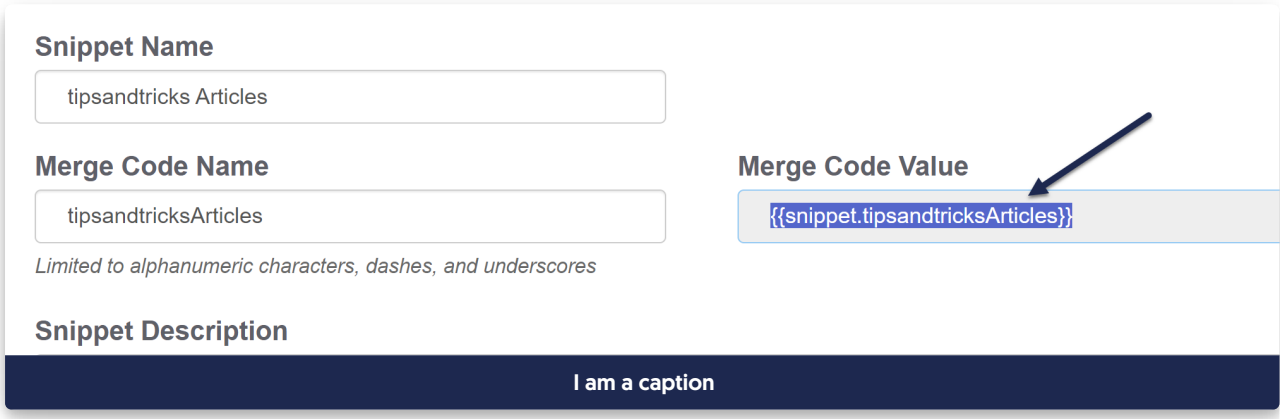
Last Modified on 05/29/2024 5:27 pm EDT

Fancybox is a JavaScript library for working with and displaying images and multimedia.

KnowledgeOwl pays for an Extended Fancybox Commercial license. As long as you are using it within your knowledge base and are not developing your own commercial products with Fancybox, you do not need to purchase your own license. To purchase your own, visit Fancybox licenses.

Our authors most commonly use Fancybox to add a click to zoom/enlarge functionality to images in their knowledge base, so that's what these instructions will cover.

Here's a sample image handled by Fancybox:



Install Fancybox

Last Modified on 05/29/2024 5:28 pm EDT

We support two installation options with Fancybox:

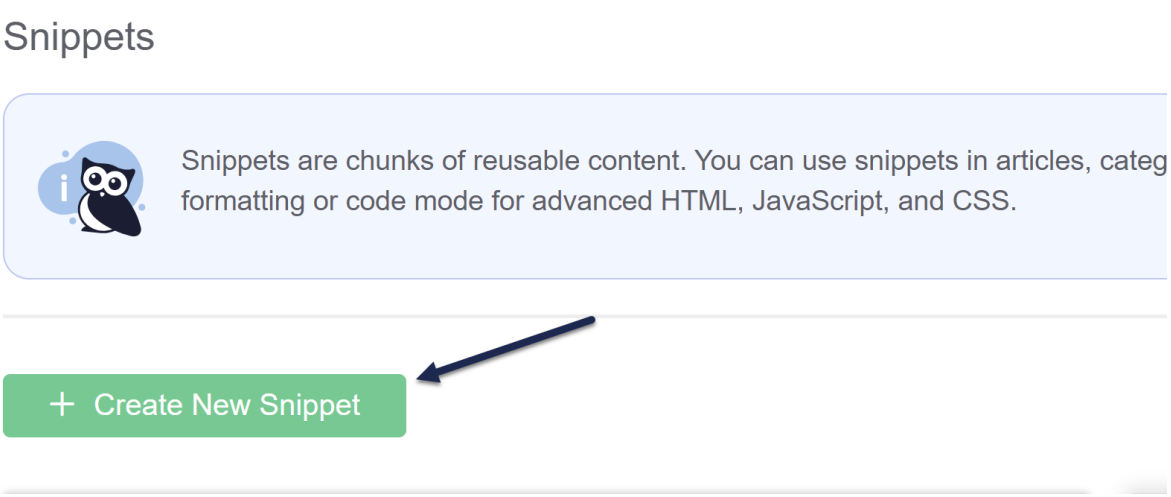
- Run Fancybox in all articles across your entire knowledge base
- Run Fancybox in specific articles of your choice

For both installations, you'll create a snippet to store the Fancybox script and references. You'll then use that snippet in different ways depending on your installation type.

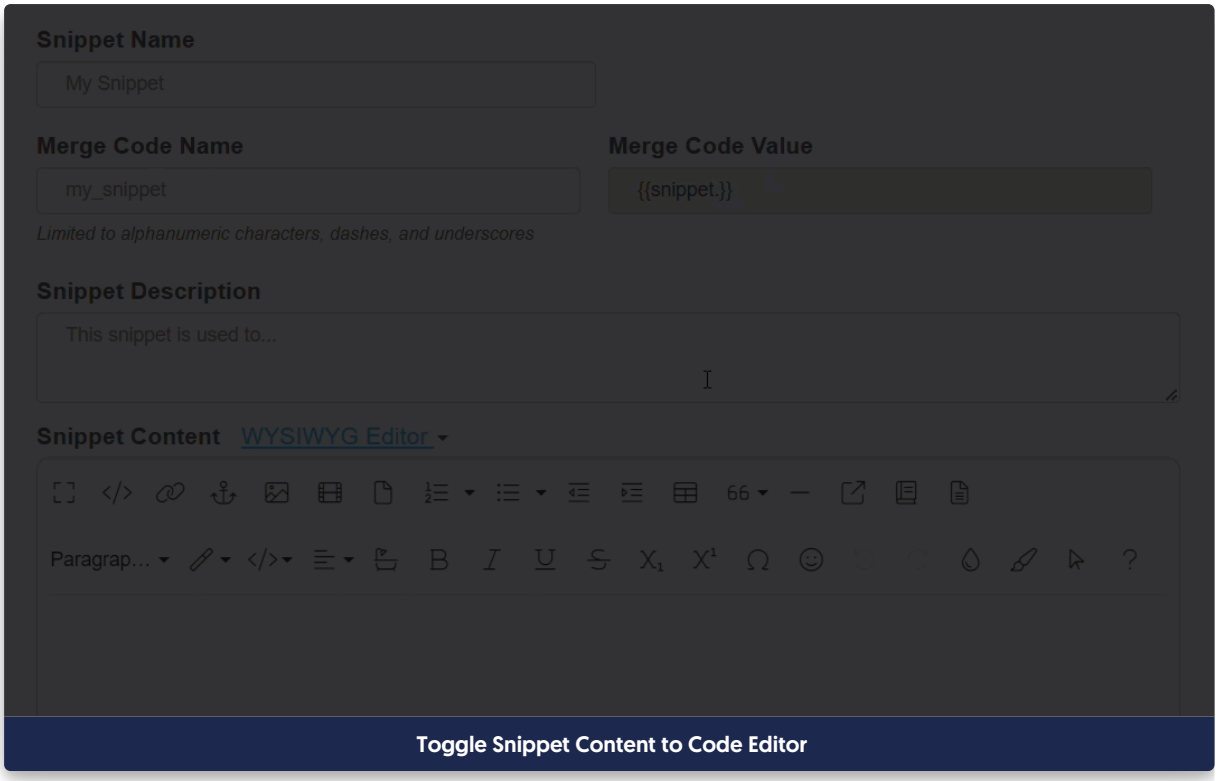
Create the snippet

First, let's create the snippet:

1. Go to **Library > Snippets.**
2. Select the **+ Create new snippet** button to begin creating a new snippet.



3. Give it a **SnippetName**, such as "Fancybox script" or "zoom in images".
4. Give it a **Snippet Description**, like "Add the Fancybox hover/click to zoom treatment to article images."
5. Use the dropdown next to **Snippet Content** to toggle to the **Code Editor:**



6. **Copy the code below and paste it into the Code Editor:**

```
<link rel="stylesheet" href="https://cdn.jsdelivr.net/npm/@fancyapps/ui@5.0/dist/fancybox/fancybox.css" />
<script src="https://cdn.jsdelivr.net/npm/@fancyapps/ui@5.0/dist/fancybox/fancybox.umd.js"></script>
<script>
  $(function(){
     var addToAll = true;
     var gallery = true;
     $(addToAll ? '.hg-article-body img' : '.hg-article-body img.fancybox').each(function(){
      if($(this).parent("a").attr("href") === undefined){
        var $this = $(this);
        var title = $this.next('.fr-inner').text();
        var src = $this.attr('data-big') || $this.attr('src');
        var a = $('<a href="#" data-fancybox data-caption="'+title+'"></a>').attr('href', src);
        $this.wrap(a);
      }
     });
     if (gallery)
        $('a[data-fancybox]').attr('data-fancybox', 'group');

     Fancybox.bind('[data-fancybox]', {
       Toolbar: {
       display: {
        left: ["infobar"],
        middle: [
          "zoomIn",
          "zoomOut",
          "toggle1to1",
          "rotateCCW",
          "rotateCW",
          "flipX",
          "flipY",
        ],
        right: ["slideshow", "thumbs", "close"],
       },
      },
      });
  });
</script>
```

7. **In the righthand column of the snippet editor, check the box to Hide from PDFs.**
8. **See Style Fancybox for optional style sections you can also add into this snippet.**
9. **Once you're done making your edits, select the Create button to finish creating and saving your snippet.**

With your snippet created, it's now decision time: do you want to run Fancybox in all articles, or only in specific articles?

All articles installation

To run Fancybox in all articles in your knowledge base:

1. **In the snippet editor, copy the Merge Code Value from the snippet you created in the previous steps.**
2. **Go to Settings > Style.**
3. **Below the preview pane, be sure Custom HTML is selected.**

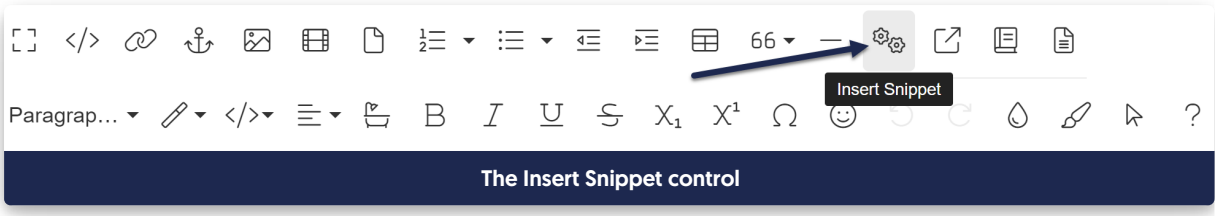
4. In the Custom HTML dropdown, select **Article**.
5. Paste the merge code value you copied in step one into the very bottom of the article HTML editor.
6. Be sure to **Save** your changes.

Fancybox will now be applied to all images in your knowledge base.

Specific articles only installation

To run Fancybox only in specific articles in your knowledge base, you'll add the snippet to those articles directly:

1. Open the article you'd like to apply the Fancybox styles to.
2. Place your cursor at the very bottom of your article on a blank line.
3. From the editor controls, select the **Insert Snippet** control (the two gear cogs icon):



The Insert Snippet control

4. Type in part of the name of the snippet you created in the previous steps. The snippet pop-up will autosuggest snippets as you type.
5. Select the correct snippet.
6. The pop-up will display some summary information about the snippet; be sure you've selected the correct one, and then select **Insert Snippet**.
7. The merge code will be inserted into your article.
8. Be sure to **Save** these changes to your article.

The Fancybox script will now apply to all the images in this article!

Style Fancybox

Last Modified on 05/29/2024 5:28 pm EDT

There are three common style customizations we've had requests for with Fancybox:

- Adding a drop shadow to the images
- Adding a slight zoom-in effect to the image when someone initially hovers over it
- Turning the cursor into a magnifying glass when the image is hovered over

See each section below for how to apply these customizations:

Drop shadow

To add the drop shadow to the images:

1. Open the snippet you created when you installed Fancybox.
2. Copy the code below.

```
<style type="text/css">
   a[data-fancybox] img {
      border: none;
      box-shadow: 0 1px 7px rgba(0,0,0,0.6);
      -o-transform: scale(1,1); -ms-transform: scale(1,1); -moz-transform: scale(1,1); -webkit-transform: scale(1,1);
   }
</style>
```

3. Paste it into the snippet you created. You can either do it at the very top or at the very bottom.
4. Be sure to **Save** the changes to your snippet.

Slight magnification of image on-hover

1. Open the snippet you created when you installed Fancybox.
2. Copy the code below.

```
<style type="text/css">
   a[data-fancybox]:hover img {
      position: relative; z-index: 999; -o-transform: scale(1.03,1.03); -ms-transform: scale(1.03,1.03); -moz-transfo
   }
</style>
```

3. Paste it into the snippet you created. You can either do it at the very top or at the very bottom.

4. Be sure to **Save** the changes to your snippet.



If you want to use the magnification AND the drop shadow, you can put them into a single style block in the snippet, provided below for you to copy:

```
<style type="text/css">
   a[data-fancybox] img {
      border: none;
      box-shadow: 0 1px 7px rgba(0,0,0,0.6);
      -o-transform: scale(1,1); -ms-transform: scale(1,1); -moz-transform: scale(1,1); -webkit-transform: scale(1,1); transf
   }
   a[data-fancybox]:hover img {
      position: relative; z-index: 999; -o-transform: scale(1.03,1.03); -ms-transform: scale(1.03,1.03); -moz-transform: sca
   }
</style>
```

Add magnifying glass on hover

By default, when you hover an image getting the Fancybox treatment, the cursor will turn into a hand icon.

You can change this to another image, like a magnifying glass, by adding the following code to your snippet:

```
<style>
.hg-article-body a[data-fancybox] img:hover {
  cursor: url('https://dyzz9obi78pm5.cloudfront.net/app/image/id/629e18fd5078ca790f415b03/n/search-solid-2.png'), au
}
</style>
```

If you don't want to use a magnifying glass, you can upload the image you'd like to use to your LIbrary > Files, copy the URL, and swap out the URL in row 3 (just be sure your new URL is still within parentheses and ('single quotes').

As with the other style options, you can add this within the same style block as the rest of the code. 😎

Customize Fancybox toolbar options

Last Modified on 05/29/2024 5:27 pm EDT

In our installation script, the `Fancybox.bind` section contains a Toolbar section that sets which toolbar controls are displayed on the left, middle, and right of the toolbar. (You should be able to figure out what most of these are just from playing with one of the images in the other tabs.)

See the Fancybox available buttons documentation for a full list of options.

We've included a subset of the available options in our example; most of those are in the "middle" portion of the display. You can tweak where the controls go by moving them to a different section, or change the controls entirely by adding or removing new options.

Apply Fancybox only to specific images

Last Modified on 05/29/2024 5:27 pm EDT

All the instructions up to this point have assumed you wanted to apply Fancybox to most--if not all--of the images in the article(s) where you're using it.

But what if you'd rather only apply Fancybox to specific images?

You can modify the installation script slightly and then use the Code View in Article Editor to identify which images should get the Fancybox treatment by adding the "fancybox" class to those images.

See below for more detailed instructions.

Modified installation instructions

Follow the overall Install Fancybox instructions, with one change:

In row 5, change `var addToAll = true` to `false`.

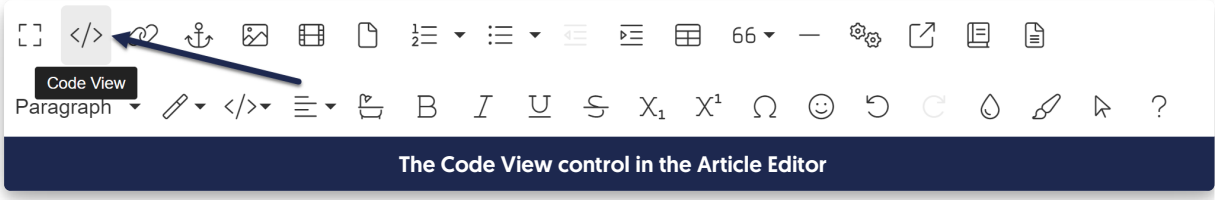
The top of your modified installation script should look like this:

```
<link rel="stylesheet" href="https://cdn.jsdelivr.net/npm/@fancyapps/ui@5.0/dist/fancybox/fancybox.css" />
<script src="https://cdn.jsdelivr.net/npm/@fancyapps/ui@5.0/dist/fancybox/fancybox.umd.js"></script>
<script>
  $(function(){
    var addToAll = false;
    var gallery = true;
    $(addToAll ? '.hg-article-body img' : '.hg-article-body img.fancybox').each(function(){
```

Add fancybox class to images in Article Editor Code View

Once you have your snippet created and added wherever is appropriate:

1. Open the article containing the images you'd like to use Fancybox for editing.
2. Highlight some text either before or after the image in the editor (this is just for ease of navigating the HTML!).
3. Select the </> control in the editor to toggle to Code View:



The Code View control in the Article Editor

4. **For images with no captions:**
    a. **The image HTML should be formatted like:**

```
<img class="img-responsive" src="" style="xxxx">
```

    b. **Add a space and the word** `fancybox` **between the** `img-responsive` **class and the closing** `"` **. So the example above would become:**

```
<img class="img-responsive fancybox" src=""language-html">xxxxxxxxxxxxxxxx.cloudfront.net/app/image/pid/xxxxxxxxxxxxxxxxxxxxxxxx/id/xxxxxxxxxxxxxxxxxxxxxxxx/n/my-image-name.png" style="xxxx">
```

    c. **Save your article.**

5. **For images with captions:**
    a. **The image HTML should be formatted like this:**

```
<div class="fr-img-space-wrap"><span class="fr-img-caption img-responsive" style="xxxx"><span class=
```

    b. **between** `img` **and** `src=` **, add** `class="fancybox"` **. So the example above would become:**

```
<div class="fr-img-space-wrap"><span class="fr-img-caption img-responsive" style="xxxx"><span class=
```

    c. **Save your article.**

Exclude specific images from Fancybox treatment

Last Modified on 05/29/2024 5:28 pm EDT

There are some cases where you might want to exclude some images from the Fancybox treatment: maybe you're displaying images of icons, for example, that people would have no reason to zoom in on.

For this, you can create a class that you'd add to the images in the article's Code View, and adjust the script to exclude that class.

We've done this using a "no-magnify" class.

This involves one adjustment to row 7 of the script to add `:not(.your-new-class)` into the first part of the statement. Here's a sample using no-magnify as our new class:

```
$(addToAll ? '.hg-article-body img:not(.no-magnify)' : '.hg-article-body img.fancybox').each(function(){
```

Be sure to **Save** those changes to your snippet.

Then, for articles that contain images you don't want magnified:

1. Highlight text close to the image (this is just so you can easily find the code you need in the following steps).
2. Select the </> control in the editor to toggle the editor to Code View.



The Code View icon in the editor

3. Look for the opening <img tag for the image you want, which should have something like `<img class="img-responsive fr-fil fr-dib"` in it.
4. In the existing class list, add the new class you added to the script. So if we use "no-magnify", the code for the img would now look like: `<img class="img-responsive fr-fil fr-dib no-magnify"`
    a. Be sure the additional class is still within the "" wrapping all of the classes, and that it does not have a period in front of it.
5. Be sure to **Save** your changes.

Any images with that class will be ignored by the Fancybox script.

Upgrade Fancybox

Last Modified on 05/29/2024 5:28 pm EDT

Follow these instructions only if you already had Fancybox added to your knowledge base.

Our previous instructions for Fancybox were for a much older version (version 3.5.6 instead of version 5!).

Our older instructions also generally advised you to add the script to **Settings > Style > Custom HTML > Article** and the CSS to **Settings > Style > Custom CSS**, though the script may also be added in **Settings > Style > Custom Head**.

We recommend shifting to this all-in-one-snippet approach for easier maintainability moving forward.

The best way to upgrade is to follow the steps in Install Fancybox and remove the existing code and CSS from **Settings > Style**.

If you don't want to do that, we recommend still copying the full code from Install Fancybox and replacing the Fancybox code in **Settings > Style** (in either **Custom HTML > Article** or **Custom Head**) with the updated script.

Here are some key components to be sure get updated:

- **Update the URLs that appear in the first two lines of the script:** the stylesheet and Fancybox jss references. You'll need these to point to version 5.0 rather than 3.5.6. These are lines 1 and 2 in the installation script.
- **Update the var title line of the script:** In our Legacy Editor, captions were wrapped in a figcaption element. If you've only ever used Modern Editor, you won't have any instances of that caption format, but our existing script still referenced it. You have two options:
  - If all your authors have only ever used the Modern Editor, you can update row 11 from `var title = $this.next('figcaption').text();` to

    ```
    var title = $this.next('.fr-inner').text();
    ```

  - If any of your authors use the Legacy Editor, update row 11 from `var title = $this.next('figcaption').text();` to

    ```
    var title = $this.next('.fr-inner').text() || var title = $this.next('.fr-inner').text();
    ```

- **Remove the fancybox references to titlePosition:** There were two references to these in the old script:
  - The variable defined in row 7: `var titlePosition = 'inside';`
  - And this portion of the script, after row 18:

    ```
    $('a[data-fancybox]').fancybox({
      titlePosition: titlePosition
    ```

- **Add the Fancybox.bind code in the second half of the script:** This code replaces the second titlePosition script. These are lines 20-36 in the updated installation script. Review the full installation script to be sure you have everything you need and the correct closing parentheses and brackets!



The toolbar and controls won't show once you click on an image if you don't add this code.

Troubleshooting

If you add the upgraded script, click on an image in the live knowledge base, and no zoomed-in image appears, this usually means that there are still references to the old Fancybox version somewhere in your knowledge base.

We recommend checking these places for the older links:

- **Settings > Style > Custom HTML > Article:** Scripts or references directly in the HTML or within snippets.
- **Settings > Style > Custom Head:** Scripts or references directly in the HTML or within snippets.



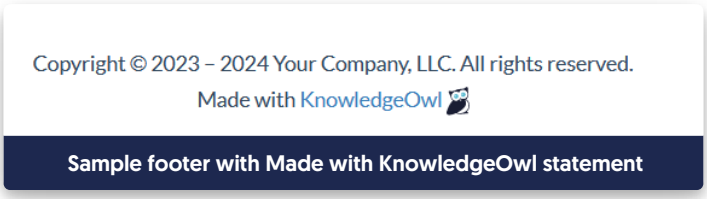
Be sure you have commented out or completely removed these old stylesheet and Fancybox jss references anywhere they appear:

```
<link rel="stylesheet" href="https://cdnjs.cloudflare.com/ajax/libs/fancybox/3.5.6/jquery.fancybox.min.css" />
<link rel="stylesheet" type="text/css" media="screen" href="https://cdnjs.cloudflare.com/ajax/libs/fancybox/1.3.4/
```

Remove "Made with KnowledgeOwl" statement from footer

Last Modified on 05/29/2024 5:28 pm EDT

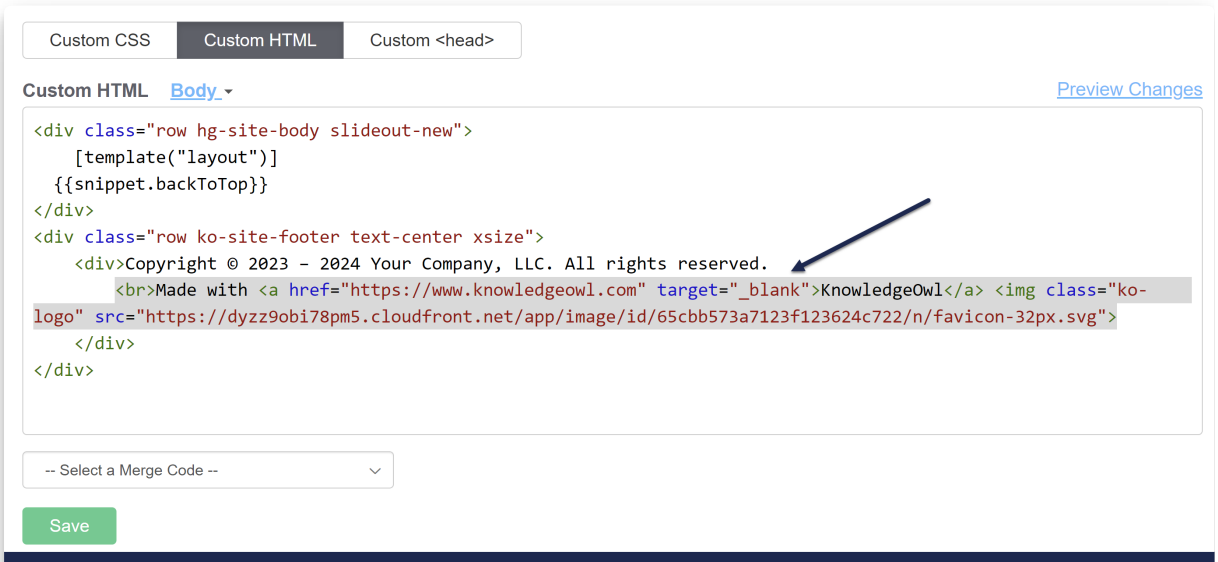
New knowledge bases created from scratch include a "Made with KnowledgeOwl" statement in the footer:



Sample footer with Made with KnowledgeOwl statement

To remove this statement:

1. **Go to Settings > Style.**
2. **Below the Preview pane, be sure Custom HTML is selected.**
3. **In the dropdown next to Custom HTML, select Body.**
4. **Look for the footer text at the bottom of the Custom HTML pane.**
5. **Delete the lines beginning with** `<br>Made with` **and ending with** `favicon-32px.svg">`**:**



Find the <br> section that contains the footer and delete the whole section.

6. **Be sure you do NOT delete either** `</div>` **that comes after it! Your footer should still look something like this:**

Custom HTML Body

```
<div class="row hg-site-body slideout-new">
    [template("layout")]
  {{snippet.backToTop}}
</div>
<div class="row ko-site-footer text-center xsize">
    <div>Copyright © 2023 – 2024 Your Company, LLC. All rights reserved.
    </div>
</div>
```

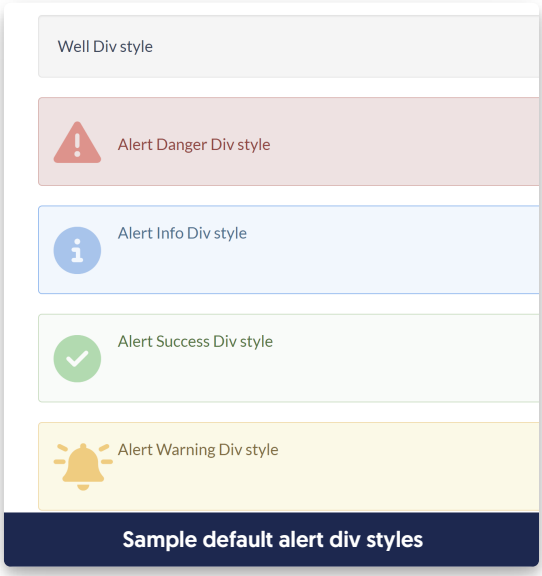
Sample footer with the "Made with KO" section removed

7. You can **Preview Changes** to be sure you like the look of things.
8. Be sure to **Save** your changes.

Change Alert div icon

Last Modified on 11/29/2024 1:33 pm EST

By default, we include some icons in our various alert divs:



As you've likely noticed, we change those icons here in the Support KB to use Linus icons instead (because...well, why wouldn't we? He's cute!).

If you'd like to make a similar change in your own knowledge base, you can!

You have two options:

1. Replace the icons with a different Font Awesome icon.
2. Replace the icons with a custom image or icon of your choice.

We'll walk through each setup below.

Replace with different Font Awesome icon

If you'd like to replace those icons with a different Font Awesome icon, you'll need to know what the unicode value for the new icons is.

To find this, open an icon in Font Awesome.

1. Near the top, they'll list a Unicode value (they often begin with f). That's the value we'll need for the instructions below.
2. For example, if we wanted to use the circle plus icon:

   The value we'd need is: `f055`

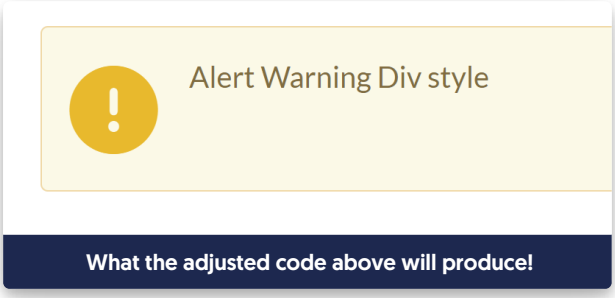
Once you have a feel for the icons you want to use:

1. Go to **Settings > Style**.
2. Below the preview pane, be sure **Custom CSS** is selected.
3. If you're using our default Custom CSS, about 2/3 of the way down that page, there should be a section for "Alert boxes".
4. In that section, look for CSS with :before on it. The exact class varies based on which alert you want to update:
    a. **Alert Danger:** `.alert.alert-danger:before`
    b. **Alert Info:** `.alert.alert-info:before`
    c. **Alert Success:** `.alert.alert-success:before`
    d. **Alert Warning:** `.alert.alert-warning:before`
5. Once you've found the CSS for the div alert you want to update, update the content: "\fxxx"; row with the unicode for the new icon you want. Keep the quotes and the beginning \.
6. In that same CSS, you can adjust the color of the icon by adding a new hex code.
7. So, for example, here's the default CSS for the Alert Warning:

```
.alert.alert-warning:before {
 content: "\f8fa";
 color: #ffcc7a;
}
```

8. And here, we've adjusted it to use the circle-exclamation icon, which has a unicode value of f06a, and a slightly different color:

```
.alert.alert-warning:before {
 content: "\f06a";
 color: #fcb900;
}
```



What the adjusted code above will produce!

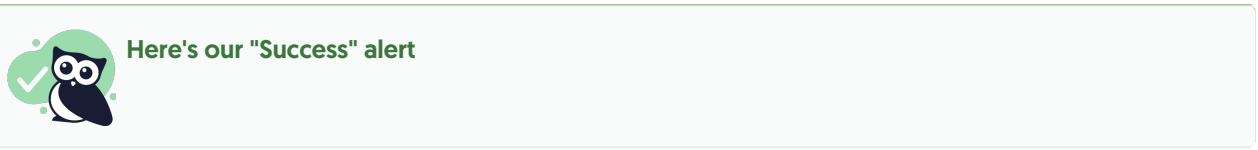
9. Once you've adjusted your CSS for the icons you want to update, be sure to **Save**.

You can also change the background color for the entire alert by looking for the CSS for for the alerts that doesn't have the :before class and adjusting the background or border colors of those:

```
.alert.alert-warning {
  background: #FDF9E6;
  border: 1px solid #FBD9A4;
}
```

Replace with custom icon/image

Our alerts use a custom icon/image instead of a built-in Font Awesome one, for example:



If you would like to make a similar change:

1. **First, be sure all of your images are available online.**
    a. **If you already have brand resources available at your own publicly-accessible site, grab the URLs for each of the images from there.**
    b. **If you don't already have brand resources available anywhere, upload the files to Library > Files. Follow the instructions to Find a file's URL.**
2. **Go to Settings > Style.**
3. **Below the preview pane, be sure Custom CSS is selected.**
4. **If you're using our default Custom CSS, about 2/3 of the way down that page, there should be a section for "Alert boxes".**
5. **First, let's comment out the CSS that adds the icons by default by adding /* before them and */ after (this is so that you can rollback these changes should you ever need to!). Look for these classes and comment them out:**
    a. **Alert Danger:** `.alert.alert-danger:before`
    b. **Alert Info:** `.alert.alert-info:before`
    c. **Alert Success:** `.alert.alert-success:before`
    d. **Alert Warning:** `.alert.alert-warning:before`
    e. **So this section of CSS should look like this once you're done.**
6. **Scroll to the very bottom of that section, so that you're adding this new CSS below all of the other alert CSS.**
7. **Copy the code below for any of the alerts you want to update, and paste it into that section:**

```
.hg-site .alert.alert-danger:before,
.alert.alert-danger:before {
  background-image: url('//dyzz9obi78pm5.cloudfront.net/app/image/id/5fd04fb5ad121ce30d79bdc3/n/alert-red.png');
}
.hg-site .alert.alert-info:before,
.alert.alert-info:before {
  background-image: url('//dyzz9obi78pm5.cloudfront.net/app/image/id/5fd04fb4ad121ce30d79bdc2/n/alert-blue.png');
}
.hg-site .alert.alert-success:before,
.alert.alert-success:before {
  background-image: url('//dyzz9obi78pm5.cloudfront.net/app/image/id/5fd04fb3ad121c127b79c7b0/n/alert-green.png');
}
.hg-site .alert.alert-warning:before,
.alert.alert-warning:before {
  background-image: url('//dyzz9obi78pm5.cloudfront.net/app/image/id/5fd04fb5ad121c230e79bce0/n/alert-yellow.png');
```

8. **Update the url listed to be the one for your custom image/icon. Be sure it stays in the format of url('my-image-url.png');**
9. **You'll also need to style that image a bit. We use this CSS, which applies the same layout and format to all the alert types, and add it just before the URLs we added above:**

```
.hg-site:not(.hg-home-page) .alert:before,
.alert:before {
  content: "";
  display: block;
  width: 75px;
  height: 60px;
  float: left;
  margin-top: 0px;
  background-size: contain;
  background-repeat: no-repeat;
}
```

10. **Be sure to Save your changes.**



This approach may require additional tinkering depending on the files/icons you're using; contact us if you get stuck or need help!

Display a back to top icon when scrolling

Last Modified on 05/29/2024 5:28 pm EDT

As you may have noticed, we have an automatic arrow that appears as you scroll down our support pages, which will take you back to the top of the page if you click it. We love the back-to-top icon since it's an easy way for your readers to quickly scroll back to the top of a long page.

We add this customization to all new-from-scratch knowledge bases as of December 2022, but if you have a knowledge base that was created before then--or if you've removed it from your knowledge base, you can follow these instructions to add it yourself.

To set this up, you'll:

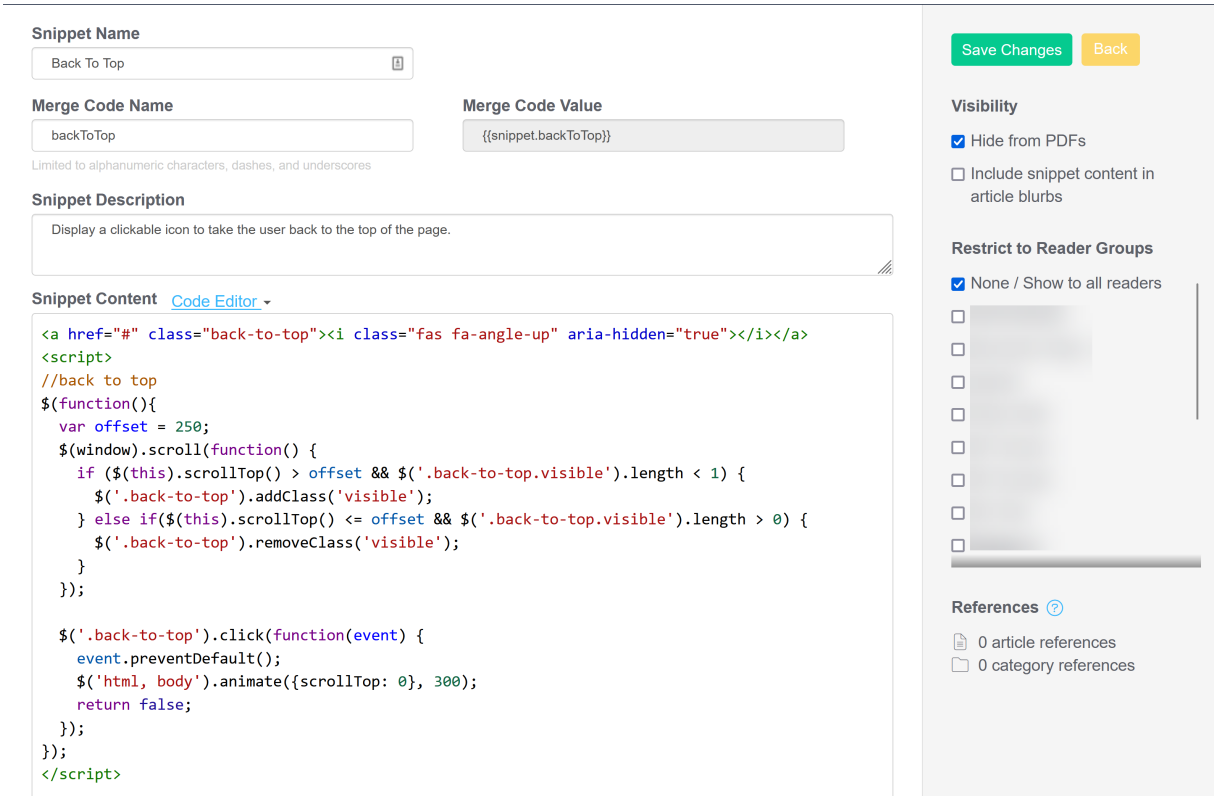
1. Create a snippet that includes the HTML and code to add the functionality.
2. Add that snippet to your **Settings > Style** page.
3. Add some **Custom CSS** to your **Settings > Style** page to style the back to top icon.

Here are the full detailed instructions:

1. Go to **Library > Snippets**.
2. Create a new snippet called "Back to Top".
3. That name should autopopulate the Merge Code Name to be backToTop, or something similar.
4. Give it a **Snippet Description** that makes sense. We recommend: "Display a clickable icon to take the reader back to the top of the page."
5. Use the dropdown next to the **Snippet Content** pane to select **Code Editor**.
6. Copy the code below and paste it into the Snippet Content pane.

```
<a href="#" class="back-to-top"><i class="fas fa-angle-up" aria-hidden="true"></i></a>
<script>
//back to top
$(function(){
 var offset = 250;
 $(window).scroll(function() {
if ($(this).scrollTop() > offset && $('.back-to-top.visible').length < 1) {
  $('.back-to-top').addClass('visible');
} else if($(this).scrollTop() <= offset && $('.back-to-top.visible').length > 0) {
  $('.back-to-top').removeClass('visible');
}
 });

 $('.back-to-top').click(function(event) {
event.preventDefault();
$('html, body').animate({scrollTop: 0}, 300);
return false;
 });
});
</script>
```

7. In **Visibility**, check the Hide from PDFs box.
8. In **Restrict to Reader Groups**, be sure the None / Show to all readers box is checked.
9. Your completed snippet should look like this:



10. Click **Create** to finish creating the snippet.
11. Once the snippet has been created and saved, copy the **Merge Code Value**.
12. Now go to **Settings > Style**.

13. **Below the preview pane, select Custom HTML.**

14. **In the Custom HTML dropdown, be sure Body is selected.**

15. **Paste the snippet merge code you copied below the template("layout") merge code:**



16. **Select Custom CSS.**

17. **Copy the CSS below and paste it in to the bottom of your Custom CSS pane. Adjust as needed to get the color combination and positioning you'd like.**

```
/********************************************** Back to top snippet styling */
/* Set the color, size, and more for the back to top square */
.back-to-top {
  background-color: #fff;
  margin: 0;
  position: fixed;
  bottom: 100px;
  right: 45px;
  width: 55px;
  height: 45px;
  z-index: 100;
  text-decoration: none;
  text-align: center;
  border-radius: 4px;
  border: 1px solid #acacac;
  box-shadow: 1px 3px 3px #aeaeae;
  visibility: hidden;
  opacity: 0;
  transition: all .2s ease-in-out;
}
/* Icon styles--set the icon color */
.back-to-top i {
  font-size: 45px;
  color: #3a3a3a;
}
/* make visible when scrolled down on page */
.back-to-top.visible {
  visibility: visible;
  opacity: 1;
}
/* mouse effect styles */
.back-to-top:hover,
.back-to-top:active,
.back-to-top:focus {
  color: #ffffff;
}
```

18. **You can Preview your changes.**

19. **Once you're satisfied, be sure to Save your changes!**

To update the CSS, you'll most likely want to adjust:

- **The background-color of the back-to-top square in row 4.**
- **The border in row 15 (adjust thickness, color, etc.)**
- **The color of the icon in row 24.**

Only play GIFs while hovering

Last Modified on 05/29/2024 5:28 pm EDT

While we don't use a lot of GIFs, we do use them occasionally for showing interactive elements that can't be adequately captured in a screenshot.

Generally, the browser will start playing GIFs as soon as the article they're in loads. This can be a bit distracting.

The steps below will help you set up a script so that the GIFs will initially display the first frame of the GIF. The GIF will only animate when a reader hovers their mouse over the GIF. While the mouse is hovered over the GIF, it will repeat indefinitely. Once they move their mouse off the GIF, it will return to that first frame.

You can see an example by hovering over this GIF:



GIF with Freeze Frame

Setup

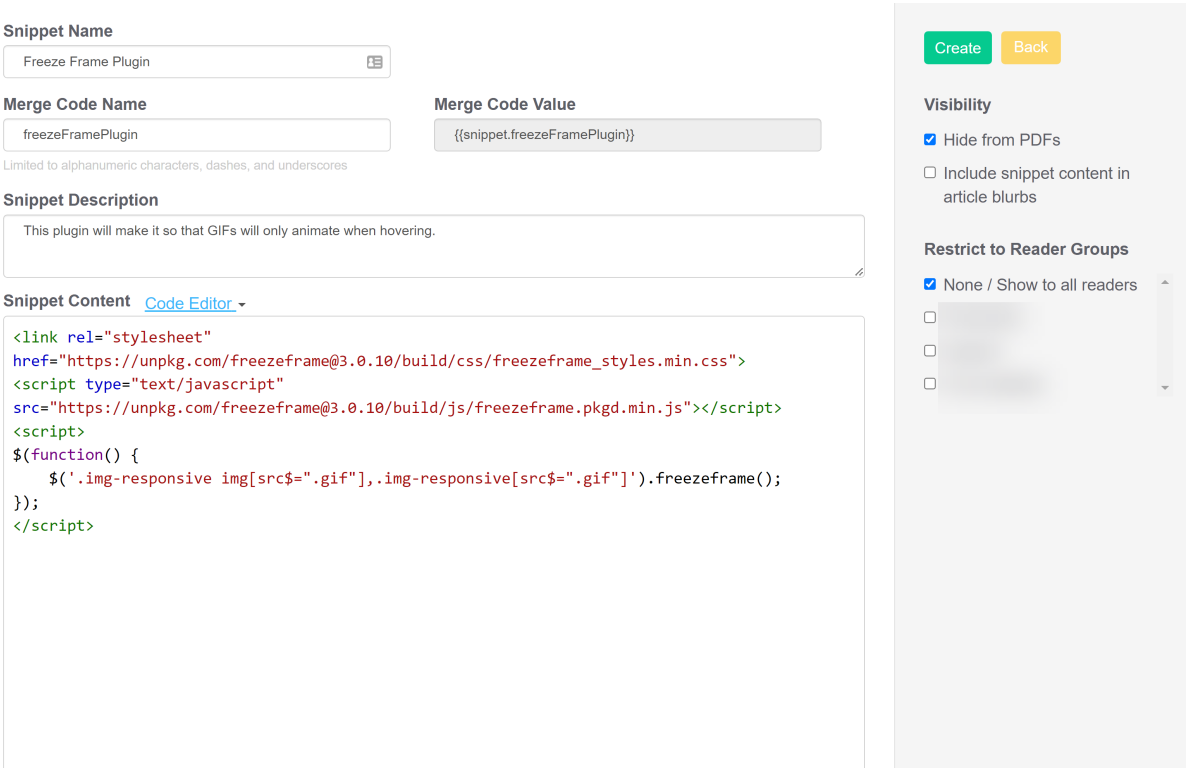
There is no way to do this natively within KnowledgeOwl, but you may use a great little plugin called FreezeFrame. Follow these steps:

1. Go to **Library** > **Snippets**.
2. Click the **+ Create New Snippet** button to create a new snippet.
3. Give your snippet a **Name**, like Freeze Frame Plugin.
4. Give your snippet a **Description**, like "This plugin will make it so that GIFs will only animate when hovering."
5. In the **Snippet Content** section, use the dropdown to select **Code Editor**.

6. **Copy the script below and paste it into the Code Editor.**

```
<link rel="stylesheet" href="https://unpkg.com/freezeframe@3.0.10/build/css/freezeframe_styles.min.css">
<script type="text/javascript" src="https://unpkg.com/freezeframe@3.0.10/build/js/freezeframe.pkgd.min.js"></s
<script>
$(function() {
   $('.img-responsive img[src$=".gif"],.img-responsive[src$=".gif"]').freezeframe();
});
</script>
```

7. **In Visibility, check the box to Hide from PDFs. Your snippet should look something like this:**



8. **Then select Create to finish creating your snippet.**

With your snippet created, you can:

- **Add your snippet into individual articles with GIFs you'd like to receive this treatment.**
- **Add your snippet to your overall Article Custom HTML template so it's applied to all articles.**

See below for steps on each.

FreezeFrame has a number of other options, including an overlay icon, the option to have to click to start/stop, and more (see their sample page for more info).

Single article use

If you'd only like to apply Freeze Frame to articles where you use it:

1. **Open the article with the GIF you'd like Freeze Frame applied to.**

2. **Insert the snippet anywhere into the article, preferably before the GIF is used.**

3. **Save** your article.

Any GIFs in this article will now get the Freeze Frame treatment you used.

All articles

To apply Freeze Frame to all articles with GIFs in them:

1. Copy the snippet merge code from the snippet you created in the setup.
2. Go to **Settings** > **Style**.
3. Below the Preview Pane, be sure **Custom HTML** is selected.
4. In the Custom HTML dropdown, select **Article**.
5. Paste the snippet merge code in anywhere in your Article Custom HTML. The bottom works well.
6. **Save** your changes.

Freeze Frame should now be applied to all GIFs across your knowledge base.

Use different logos for different reader groups

Last Modified on 05/29/2024 5:28 pm EDT

Some knowledge bases use different Reader Groups to show different content to different readers.

On occasion, we've been asked if it's possible to show a different logo in the upper left depending on reader group membership. The short answer is: yes.

The longer answer is: you'll need to use a script to do this.

To do so:

1. Go to **Library** > **Files**.
2. Upload all the logos you want to use here, using the **+ Add Files** button.
3. Once you've uploaded your logos, you'll need to get the URL for each of them. See Find a file's URL for more complete steps. As you copy each URL, save it to a text editor--we'll need it later!
4. Go to **Settings** > **Style**.
5. Below the Preview Pane, be sure that **Custom HTML** is selected.
6. In the Custom HTML dropdown, be sure **Body** is selected.
7. Copy the code below and paste it into the bottom of the Body editor. Here, we use three groups, but you can use as few as two and as many as you'd like.

```
<script>
 //Show different logos depending on which reader group a reader belongs to
 $(function(){
  //Get which groups current reader belongs to
  var groups = '[reader("groups")]';

  //Switch logo for Group1 where "Group1" is the exact name of the reader group. Update to your group name.
  if(groups.indexOf("Group1") >= 0)
  {
   //Specify the image URL for Group1 and switch
      var src = "//dyzz9obi78pm5.cloudfront.net/app/image/id/{yourimageid}/n/{yourimagename.png}";
      $('.navbar-brand img').attr("src", src);
  }

  //Switch logo for Group2 where "Group2" is the exact name of the reader group. Update to your group name.
  if(groups.indexOf("Group2") >= 0)
  {
   //Specify the image URL for Group2 and switch
      var src = "//dyzz9obi78pm5.cloudfront.net/app/image/id/{yourimageid}/n/{yourimagename.png}";
      $('.navbar-brand img').attr("src", src);
  }

  //Switch logo for Group3 where "Group3" is the exact name of the reader group. Update to your group name.
  if(groups.indexOf("Group3") >= 0)
  {
   //Specify the image URL for Group3 and switch
      var src = "//dyzz9obi78pm5.cloudfront.net/app/image/id/{yourimageid}/n/{yourimagename.png}";
      $('.navbar-brand img').attr("src", src);
  }

 });
</script>
```

8. **In row 7, replace "Group1" with the exact name of your first reader group, as it appears in Your Account > Readers > Groups.**
9. **In row 10, replace the URL listed in "quotes" with the URL you copied from your File Library for the icon you'd like displayed for this group.**
10. **In row 15, replace "Group 2" with the exact name of your second reader group, as it appears in Your Account > Readers > Groups.**
11. **In row 18, replace the URL listed in "quotes" with the URL you copied from your File Library for the icon you'd like displayed for this group.**
12. **If you're using a third group, in row 23, replace "Group3" with the exact name of your second reader group, as it appears in Your Account > Readers > Groups, and replace the file URL in row 26. If you're not using a third group, you can delete rows 22-28.**
13. **If you're using more than three groups, you can copy rows 22-28 and paste them to add additional groups. Just be sure you update the group name in each and the URL of the file.**
14. **Once you're done, be sure to Save your changes.**

For example, here we have two groups called "Support" and "Production":

Custom HTML Body Preview Changes

```
<script>
  //Show different logos depending on which reader group a reader belongs to
  $(function(){
    //Get which groups current reader belongs to
    var groups = '[reader("groups")]';

    //Switch logo for Group1 where "Group1" is the exact name of the reader group. Update to your group name.
    if(groups.indexOf("Production") >= 0)
    {
      //Specify the image URL for Group1 and switch
         var src = "https://dyzz9obi78pm5.cloudfront.net/app/image/id/                    /n/mandolinus-
1.svg";
         $('.navbar-brand img').attr("src", src);
    }

    //Switch logo for Group2 where "Group2" is the exact name of the reader group. Update to your group name.
    if(groups.indexOf("Support") >= 0)
    {
      //Specify the image URL for Group2 and switch
         var src = "https://dyzz9obi78pm5.cloudfront.net/app/image/id/                    /n/kate.svg";
         $('.navbar-brand img').attr("src", src);
    }

  });
</script>
```

You can test that this script is working as expected by selecting "View KB" from the top navigation. This will open your knowledge base with the author footer, and you can use the Change Reader Groups option to toggle to see what each group will see. See Test reader group access for complete steps!

Set your footer copyright year to automatically update

Last Modified on 08/28/2024 11:53 am EDT

Browser compatibility
If you added this script to your knowledge base before June 2022, we recommend updating it! The old version used a method that Chrome sometimes blocked and Firefox warned about and sometimes blocked (`document.write`). We've updated the script to use a JQuery method that's better supported by all browsers.

If you're using our default theme or the Minimalist theme, your knowledge base by displays a footer with a copyright year.

The years used will depend on when you created your knowledge base and whether you've manually edited it.

For example, if you've created your knowledge base recently, the default Custom HTML for your knowledge base's footer will set the Copyright to: `Copyright © 2023 - 2024 Your Company, LLC. All rights reserved.`

You might choose to keep this range or set it to the current year.

While you can manually edit the current or ending year, that can be a bit of a pain to remember to update. Here's a quick custom HTML change you can add to make it so you never have to update your copyright year again.

PDF limitations
This script will not work in the PDF Footer for **Settings** > **Individual PDFs**.

1. Go to **Settings** > **Style**.
2. In the **Customize HTML, CSS, and JS** section, select **Custom HTML**.
3. Select **Body** from the **Select HTML section to edit** dropdown.
4. The copyright statement is at or near row 6:

```
<div class="row hg-site-body slideout-new">
 [template("layout")]
 {{snippet.backToTop}}
</div>
<div class="row ko-site-footer text-center xsize">
   <div>Copyright © 2023 – 2024 Your Company, LLC. All rights reserved.
      <br>Made with <a href="https://www.knowledgeowl.com" target="_blank">KnowledgeOwl</a> <img class
   </div>
</div
```

5. **Copy the code below and paste it in below the rest of your Custom HTML:**

```
<!-- Get current year for copyright statement -->
<script>
 $('#spanYear').html(new Date().getFullYear());
</script>
```

6. **Once you've done that, find the year portion of your copyright statement that you'd like to autoupdate. Replace that year with this code:**

```
<span id="spanYear"></span>
```

7. **You can Update Preview to see how it looks.**

8. **Once you're happy with how your dates look, be sure to Save your changes.**

For example, here's what the HTML might look like if we chose to keep the range:

```
<div class="row hg-site-body slideout-new">
   [template("layout")]
 {{snippet.backToTop}}
</div>
<div class="row ko-site-footer text-center xsize">
   <div>Copyright © 2023 – <span id="spanYear"></span> Your Company, LLC. All rights reserved.
      <br>Made with <a href="https://www.knowledgeowl.com" target="_blank">KnowledgeOwl</a> <img class="ko-l
   </div>
</div>

<!-- Get current year for copyright statement -->
<script>
 $('#spanYear').html(new Date().getFullYear());
</script>
```

And here's what it might look like if we removed the range and kept it to a single year:

```
<div class="row hg-site-body slideout-new">
    [template("layout")]
  {{snippet.backToTop}}
</div>
<div class="row ko-site-footer text-center xsize">
    <div>Copyright © <span id="spanYear"></span> Your Company, LLC. All rights reserved.
        <br>Made with <a href="https://www.knowledgeowl.com" target="_blank">KnowledgeOwl</a> <img class="ko-l
    </div>
</div>

<!-- Get current year for copyright statement -->
<script>
  $('#spanYear').html(new Date().getFullYear());
</script>
```

Fix anchor links hidden by top navigation

Last Modified on 05/29/2024 5:28 pm EDT

A common issue with clicking on an anchor links to navigate on the same page or to an anchor on a different page is that the top navigation bar can cover part of the content (usually the header or the exact spot that the anchor is tied to).

While we used to suggest a CSS solution or a JS solution, we've found a single CSS solution that seems to work quite well; it basically just helps enforce whatever the height of your top navigation is.

If you're the top navigation overlap your content, try this:

1. Go to **Settings > Style**.
2. Below the Preview Pane, be sure **Custom CSS** is selected
3. Copy the code below and paste it into the Custom CSS pane.

```
/* Make sure that the top navigation never overlaps content when an anchor is clicked */
body, html {
  scroll-padding-top: 55px; /* adjust the pixel amount here for your top navigation bar height */
}
```

4. You can adjust the pixel amount listed for the scroll-padding-top based on the height of your top navigation. More pixels = more padding.
5. Be sure to **Save** your changes once you're done.

Why do we use both body and html? In our testing, body seems to work better with Chrome and html seems to work better with other browsers, so using it on both seems to cover all your browser bases.

Use your own syntax highlighter for code blocks

Last Modified on 08/21/2024 3:03 pm EDT

By default, KnowledgeOwl offers a basic syntax highlighting color scheme:

Sample default code syntax highlighting for HTML

You might want to add a bit more color to your syntax, so that it matches your overall knowledge base theme, maybe something like this:

Sample Prism code syntax highlighting for HTML

You can do this with a third-party syntax highlighter.

Below, we walk through using a third-party syntax highlighter called Prism, which we use in this knowledge base. We're not specifically endorsing Prism as a syntax highlighter, just using it as an example!

General setup

Each syntax highlighter may have a slightly different setup process, but generally speaking, there's a two-step setup process:

Step 1: Overall setup

This is a one-time setup to include the syntax highlighter's relevant files in your knowledge base in **Settings > Style**.

Most likely you'll need:

- One or more scripts provided as part of the syntax highlighter to actually complete the highlighting. Generally in the form of a minified .js file, though it can take other forms!
- One or more CSS files (usually provided as part of the syntax highlighter, often customizable) to handle the styling/theme of the highlighter.
- Additional scripts may be necessary for specific plugins, languages, or functionality from your syntax highlighter.

You'll also need to disable the default syntax highlighting in **Settings > Basic**.

Step 2: Add appropriate class, attribute, or tag in your content

As you add code in your content, add the appropriate formats to trigger the highlighting. Most syntax highlighters use the convention of code needing to be placed in a Preformatted block, and then placed within

a code block. You can use our WYSIWYG editor to create this overall setup, but you may need to modify the code formatting.

Our built-in code functionality uses data-language attributes, and many syntax highlighters use different attributes. You'll need to pay attention to what your syntax highlighter uses and be comfortable hopping into the Code View in KnowledgeOwl to adjust it accordingly.

For example, Prism uses a class that is set to language-xxx where xxx is the language the code is in.

So if you used our WYSIWYG, what you'd see for a simple block of HTML code might look like this in Code View:

```
<pre><code data-language="html">
  <!DOCTYPE html>
  <html>
    <head>
      <link rel="stylesheet" href="">
      <script src=""></script>
    </head>
    <body>
      <h1>My First Heading</h1>
      <p>My first paragraph.</p>
    </body>
  </html>
</code></pre>
```

But you'd need to edit it to replace the `data-language="html"` attribute with `class="language-html"`, like this:

```
<pre><code class="language-html">
  <!DOCTYPE html>
  <html>
    <head>
      <link rel="stylesheet" href="">
      <script src=""></script>
    </head>
    <body>
      <h1>My First Heading</h1>
      <p>My first paragraph.</p>
    </body>
  </html>
</code></pre>
```

Example setup: Prism syntax highlighter

To help you understand how to set up a sample syntax highlighter, we'll walk you through how we set up Prism. Note that these steps are specific to Prism and you should follow any instructions provided by your syntax highlighter.



Source file
The steps below include downloading your own Prism JS and CSS files. Prism has many of its files available on CDNJS, so you could also source them from there and just add references to those URLs in your Custom Head.

Step 1: Get your Prism JS and CSS

1. Go to https://prismjs.com.
2. Review the instructions (it's especially helpful to look at the themes and the plugins).
3. Once you have a sense for which options you'd like, select the **Download** option at the top of the page.
4. For our purposes, we're using the minified version, since this keeps it fairly lightweight. You can choose whatever option you'd like.
5. Prism's download gives you the option to select themes, languages, and extra plugins.We use these options:
    a. **Theme:** Tomorrow Night (because dark mode!)
    b. **Languages:** We kept the defaults (Markup + HTML + XML + SVG + MathML + SSML + Atom + R, CSS, C-like, and JavaScript) and also added JSON + Web App Manifest, Bash (which works for cURL highlighting), and PHP, since we occasionally show JSON examples and PHP examples.
    c. **Extra plugins:** Use what seems good to you. We like line numbers, inline color, toolbar, and copy to clipboard button--those are all in-use here in our knowledge base. 😉
6. At the bottom of the page, select **Download JS** and select **Download CSS**. This downloads the JS and CSS files based on your selections.
7. If you'd like to customize the color choices in your theme, you'll need to make edits to the prism.css file directly. We tweaked ours a bit so that the syntax highlighting uses color hexes from our branded color palette, but that's not necessary! Just be sure you resave your css file if you do make changes.

Step 2: Add your Prism JS and CSS to KnowledgeOwl



Source file
Prism has many of its files available on CDNJS, so you could also source them from there and just add references to those URLs in your Custom Head. That page includes links to copy the script files directly, but you'd need to select all the files you needed--each language, plugin, etc.

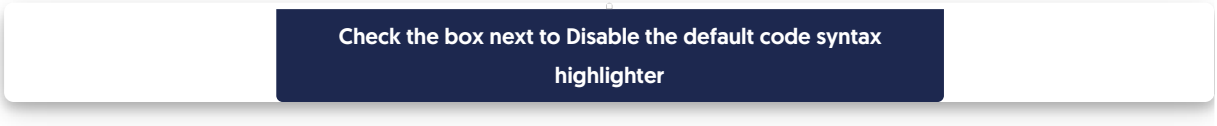
1. In KnowledgeOwl, go to **Library > Files**.
2. Select **Add files** and upload your prism.js and prism.css files.
3. Once you've added them, you'll need the URL for each file. Refer to Find a file's URL for more information. We recommend copying and pasting the URLs to a text editor for now.
4. Go to **Settings > Style**.
5. In the **Customize HTML, CSS, and JS** section, select **Custom <head>**.
6. Copy the code below and paste it into your Custom head:

```
<link rel="stylesheet" href="">
<script src=""></script>
```

7. Replace the stylesheet href URL in row 1 with the URL of your prism.css file, copied in step 4.
8. Replace the src URL in row 2 with the URL of your prism.js file, copied in step 4.
9. **Save** your changes.

Step 3: Disable default syntax highlighting

1. Go to **Settings > Basic**.
2. In the **Website settings** section, look for **Content** and check the box next to **Disable the default code syntax highlighter:**



3. **Save** your changes.

Step 4/ongoing: Use the correct format in your code blocks

As mentioned above, Prism will only apply syntax highlighting to code that's in a preformatted text section, in a code block, with class set to language-xxx where the language references a code/format it understands.

So the format you'll need to appear in your code blocks is:

```
<pre><code class="language-xxx">
   Actual code goes here
</code></pre>
```

Where language-xxx is replaced by a valid language code in Prism's formatting, like "language-html" or "language-css". You can see the supported language formats on their site in the Supported Languages section. They do loosely align to the code data-language our WYSIWYG uses.

Preformatted text that doesn't have a code block in it--or code blocks that lack the class="language-xxx" format--will not be highlighted.

The fastest way to get to this setup using our WYSIWYG is to:

1. Paste your code into the editor.
2. Highlight the code and select the Preformatted Text option in the formatting dropdown (or use Ctrl + Alt + 7).
3. With the code still highlighted, use the Code Block control to add a Code block with whatever language formatting you want.
4. Then shift into Code View to edit the code to change data-language="whatever" to class="language-

whatever", or whatever format your syntax highlighter uses.

Some plugins, like the line numbers plugin, require additional formatting.

For the easiest use of the line numbers plugin, we found that editing **Settings > Style, Custom HTML > Article** to add the "line-numbers" class to the div that contains the article body template worked easiest, as that automatically adds line-numbers to all blocks of code, like this in row 10:

```
<div class="hg-article-body line numbers">
  [article("body")]
  [article("required_reading_acknowledgement")]
</div>
```

Create an article table of contents (TOC) from headers

Last Modified on 05/29/2024 5:27 pm EDT

For long articles, you may want to create create a table of contents inside your articles with links to different sections of content. Rather than use manually-created anchors, you can save a bunch of time on setup by using one of our snippets.



Pro tip: Consider using a topic display category with individual articles for each section, rather than these snippets. Topic display categories give you an automatic Quick Links section at the top and the option to have each article they contain within an expanding/collapsing accordion.

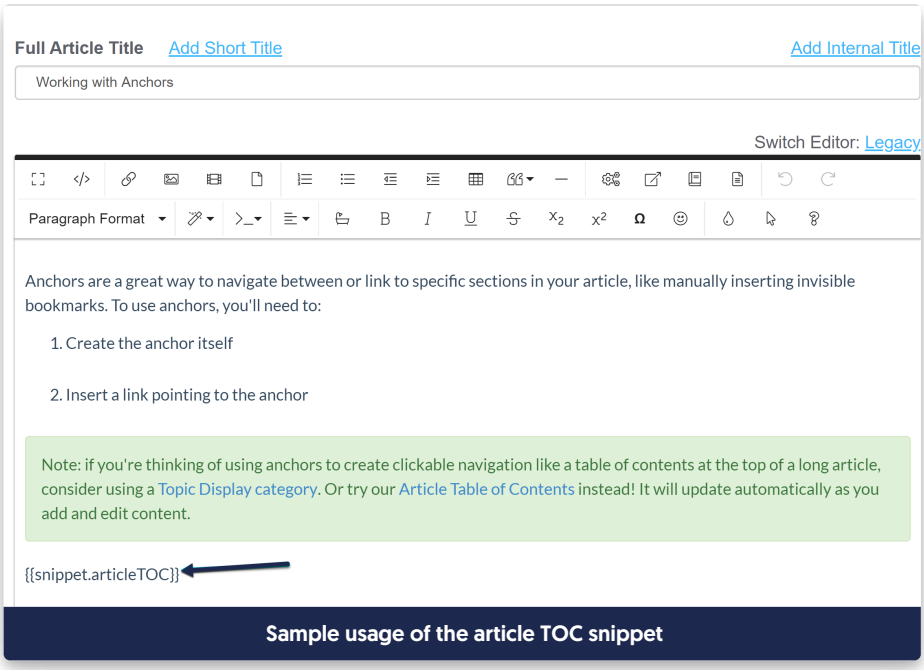
We have two snippets for you to use: one will create a table of contents using a single level of headings (Heading 2). The other will create a nested table of contents using several levels of headings (Heading 2, Heading 3, and Heading 4). This article demonstrates the nested table of contents.



We offer snippets like this as courtesy standalone customizations for your knowledge base. Using multiple snippets together may cause unintended consequences. Please snippet responsibly and remember that some problems are best solved by a developer!

How to use the snippets

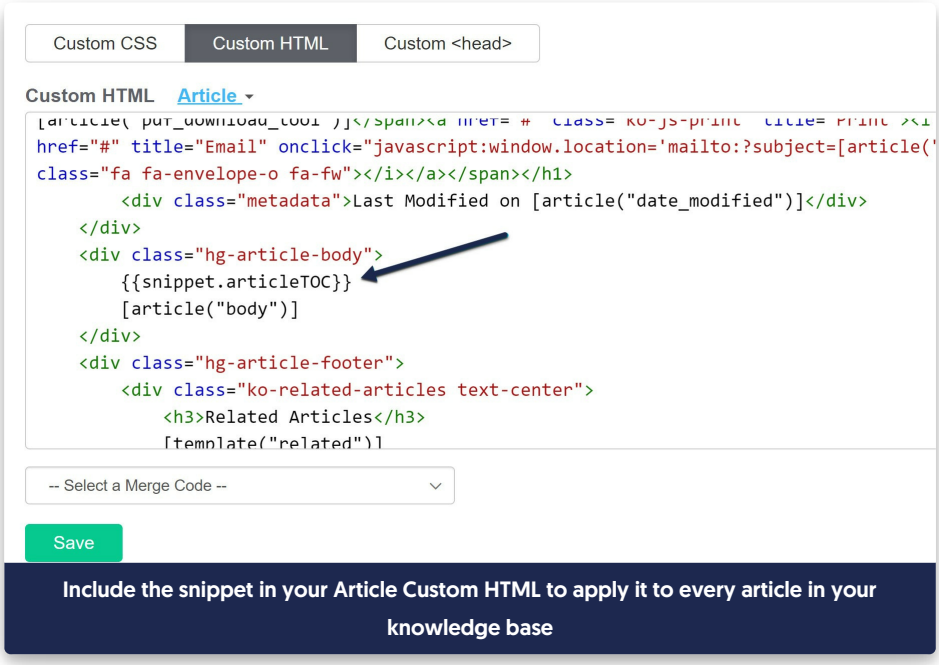
Using one of these snippets will create a clickable table of contents in list format that links to either all of the Heading 2s in your article, or all of the Headings in the levels you specify in the article. You can place the snippet wherever you would like the table of contents to appear:



Sample usage of the article TOC snippet

If you'd like to apply the article table of contents snippet to all articles in your knowledge base, you can add it to the Custom HTML for article:

1. **Go to Settings > Style.**
2. **Click on Custom HTML and select Article from the dropdown.**
3. **Add the snippet mergecode in where you'd like it to appear. For example, adding it here will place it after the article title and Last Modified line but before the start of the article's text itself:**



Include the snippet in your Article Custom HTML to apply it to every article in your knowledge base

4. **Click Save.**



Be warned: these snippets will not generate a table of contents in downloaded PDFs, as they depend on Javascript executing after the page loads, whereas PDFs are generated when the article is saved. They also won't work properly if added to articles that are within a topic display

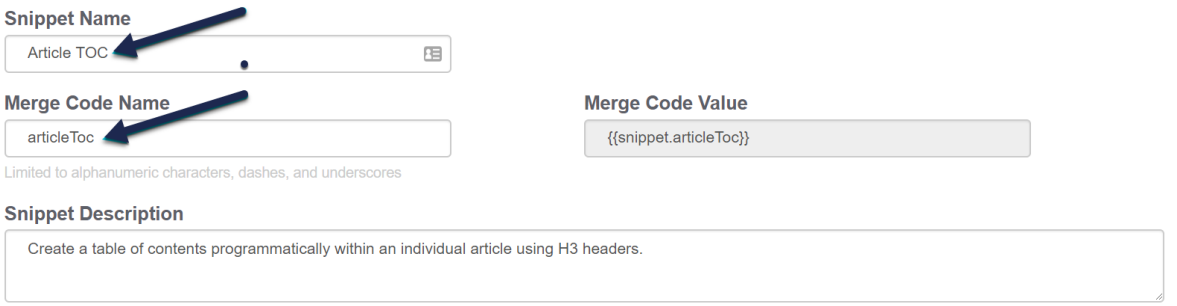
category.

Snippet 1: Article TOC with one level of headings

This snippet will create a table of contents listing all of the headings of a specific level (by default, the snippet uses Heading 2, but you can edit this to suit your style guide.) You can see this snippet in action in Working with Anchors.

To use this snippet:

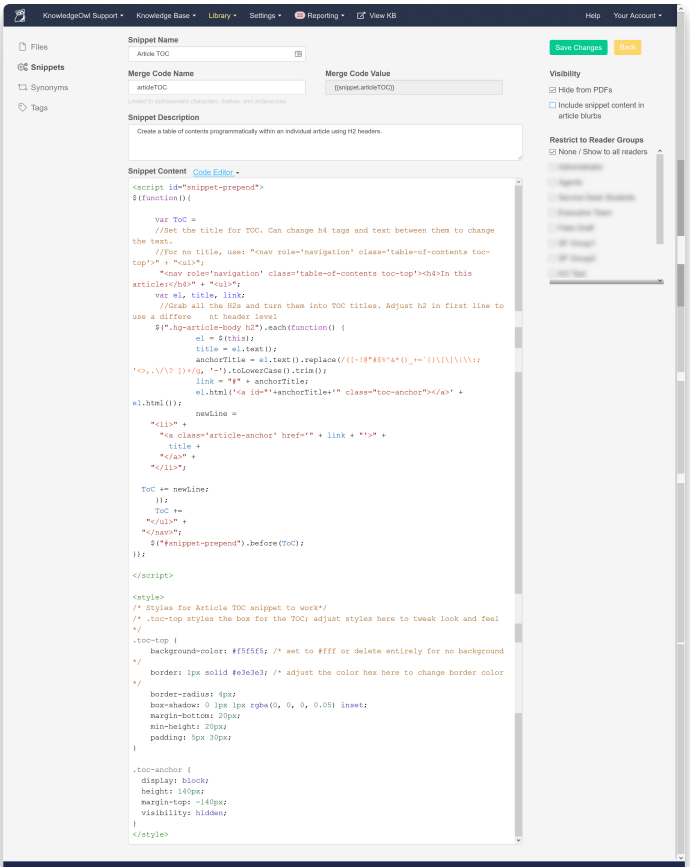
1. Go to **Library > Snippets**.
2. Click on **Create New Snippet**.
3. Give your Snippet a name and a merge code, and choose to **hide it from PDFs** (since it won't work in this format).



4. Change the editor type to 'Code Editor' first (instead of the WYSIWYG one) and then copy and paste the following code into the Snippet text area:

```
<script id="snippet-prepend">
$(function(){

    var ToC =
    //Set the title for TOC. Can change h4 tags and text between them to change the text.
    //For no title, use: "<nav role='navigation' class='table-of-contents toc-top'>" + "<ul>";
     "<nav role='navigation' class='table-of-contents toc-top'><h4>In this article:</h4>" + "<ul>";
    var el, title, link;
     //Grab all the H2s and turn them into TOC titles. Adjust h2 in first line to use a different header level
    $(".hg-article-body h2").each(function() {
            el = $(this);
            title = el.text();
            anchorTitle = el.text().replace(/([~!@"#$%^&*()_+=`{}\[\]\|\\:;'<>,.\/\? ])+/g, '-').toLowerCase().trim();
            link = "#" + anchorTitle;
            el.html('<a id="'+anchorTitle+'" class="toc-anchor"></a>' + el.html());
            newLine =
   "<li>" +
     "<a class='article-anchor' href='" + link + "'>" +
       title +
     "</a>" +
   "</li>";

  ToC += newLine;
    });
    ToC +=
  "</ul>" +
 "</nav>";
   $("#snippet-prepend").before(ToC);
});

</script>

<style>
/* Styles for Article TOC snippet to work*/
/* .toc-top styles the box for the TOC; adjust styles here to tweak look and feel */
.toc-top {
   background-color: #f5f5f5; /* set to #fff or delete entirely for no background */
   border: 1px solid #e3e3e3; /* adjust the color hex here to change border color */
   border-radius: 4px;
   box-shadow: 0 1px 1px rgba(0, 0, 0, 0.05) inset;
   margin-bottom: 20px;
   min-height: 20px;
   padding: 5px 30px;
}

.toc-anchor {
  display: block;
  height: 140px;
  margin-top: -140px;
  visibility: hidden;
}
</style>
```

Your final snippet should look something like this when you save it:



Sample Article TOC snippet using H2s

5. Click **Create**.

6. Copy and paste the merge code for your snippet into any article where you want the table of contents to appear, as shown in the Editor screenshot at the top of this article.

Customize the Table of Contents header/wording

You can tweak this code to customize the appearance and functionality of your Article Table of Contents.

- Customize the Table of Contents header text. Replace "In this article:" with wording of your choice in row 7:

```
"<nav role='navigation' class='table-of-contents toc-top'><h4>Quick Links</h4>" + "<ul>";
```

- Change the "In this article" text from an h4 to a div, p, or any other HTML element in row 7. Or remove it. Here, we've changed it to paragraph:

```
"<nav role='navigation' class='table-of-contents toc-top'><p>In this article:</p>" + "<ul>";
```

- Customize the script to build the table of contents of header 3s instead of header 2s in row 10:

```
  $(".hg-article-body h3").each(function() {
```

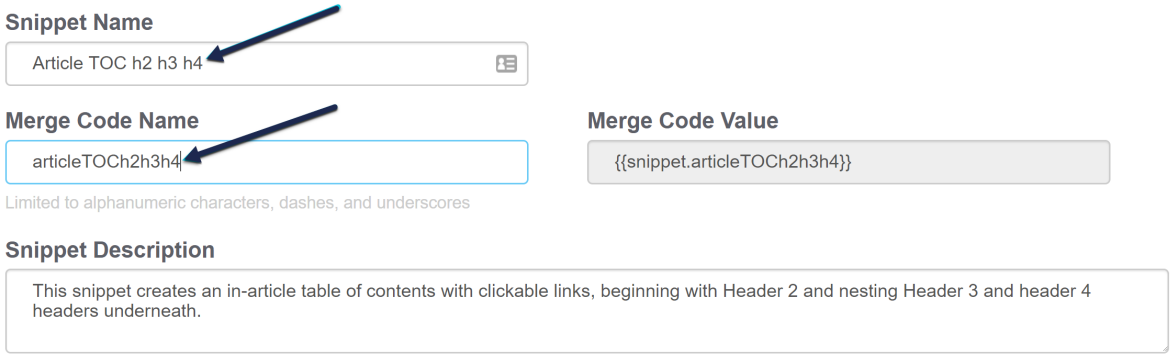
Snippet 2: Article TOC with nested headers

This snippet will create a table of contents with nested/bullet point headings for multiple layers of headings. By

default, the snippet uses Headings 2, 3, and 4 but you can edit these. You can see this snippet in action if you go back to the top.

To use this snippet:

1. Go to **Library > Snippets.**
2. Click on **Create New Snippet.**
3. Give your Snippet a name and a merge code, and choose to **hide it from PDFs** (since it won't work in this format).

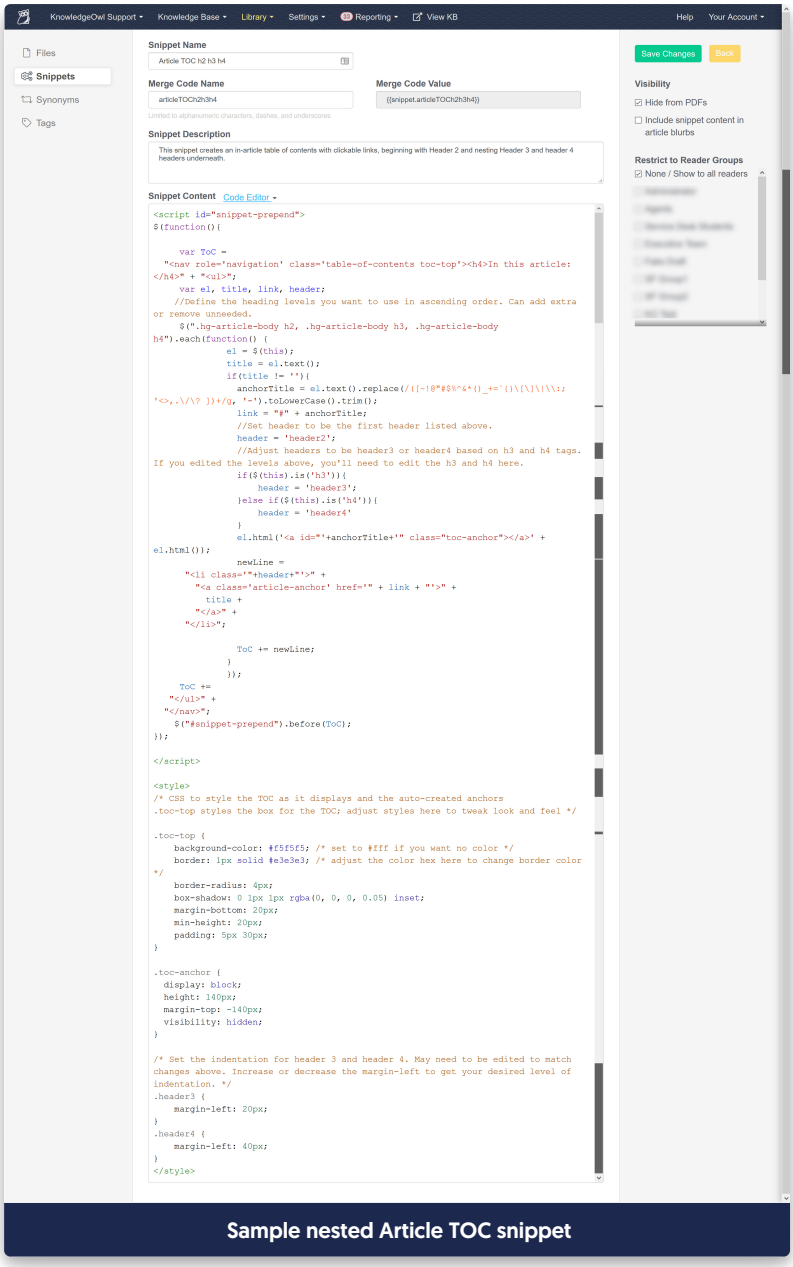


4. Change the editor type to 'Code Editor' first (instead of the WYSIWYG one) and then copy and paste the following code into the Snippet text area:

```
<script id="snippet-prepend">
$(function(){

   var ToC =
 "<nav role='navigation' class='table-of-contents toc-top'><h4>In this article:</h4>" + "<ul>";
   var el,     title, link, header;
    //Define the heading levels you want to use in ascending order. Can add extra or remove unneeded.
   $(".hg-article-body h2, .hg-article-body h3, .hg-article-body h4").each(function() {
          el = $(this);
          title = el.text();
            if(title != ''){
          anchorTitle = el.text().replace(/([~!@"#$%^&*()_+=`{}\[\]\|\\:;'<>,.\/\? ])+/g, '-').toLowerCase().trim();
          link = "#" + anchorTitle;
          //Set all headers to a 0-nesting level.
          header = 'header-nesting-0';
          //Adjust header-nesting layers so that they point to the correct html tag. header-nesting-1 should match t
          if($(this).is('h3')){
             header = 'header-nesting-1';
          }else if($(this).is('h4')){
             header = 'header-nesting-2'
          }
          el.html('<a id="'+anchorTitle+'" class="toc-anchor"></a>' + el.html());
          newLine =
    "<li class='"+header+"'>" +
      "<a class='article-anchor' href='" + link + "'>" +
        title +
      "</a>" +
    "</li>";


          ToC += newLine;
        }
        });
```

```
    ToC +=
  "</ul>" +
 "</nav>";
   $("#snippet-prepend").before(ToC);
});

</script>

<style>
/* CSS to style the TOC as it displays and the auto-created anchors
.toc-top styles the box for the TOC; adjust styles here to tweak look and feel */

.toc-top {
   background-color: #f5f5f5; /* set to #fff or delete entirely for no background */
   border: 1px solid #e3e3e3; /* adjust the color hex here to change border color */
   border-radius: 4px;
   box-shadow: 0 1px 1px rgba(0, 0, 0, 0.05) inset;
   margin-bottom: 20px;
   min-height: 20px;
   padding: 5px 30px;
}


.toc-anchor {
 display: block;
 height: 140px;
 margin-top: -140px;
 visibility: hidden;
}

/* Set the indentation for the nesting levels. May need to be edited to match changes above. Increase or decrease t
.header-nesting-1 {
   margin-left: 20px;
}
.header-nesting-2 {
   margin-left: 40px;
}
</style>
```

Your final snippet should look something like this when you click Save Changes:



Sample nested Article TOC snippet

6. Click **Save**.

7. Copy and paste the merge code for your snippet into any article where you want the table of contents to appear, as shown in the Editor screenshot at the top of this article.

Customize the headings used

You can add additional heading levels beyond the example, remove unneeded headings, or begin them at a different level. Here is an example of how to begin them at a different level:

1. Customize the script to build the table of contents using different heading levels. This involves edits in a few places. First, edit the list in row 8. Here we begin with heading 3 and add heading 4 and 5:

```
$(".hg-article-body h3, .hg-article-body h4, .hg-article-body h5").each(function() {
```

2. Next, adjust the header if statement so that it references the nesting-layers we changed above (nesting

layer 1 is now h4 and layer 2 is now h5):

```
//Adjust header-nesting layers so that they point to the correct html <h> tag.
            if($(this).is('h4')){
                header = 'header-nesting-1';
            }else if($(this).is('h5')){
                header = 'header-nesting-2'
```

Customize the Table of Contents header/wording

- Customize the Table of Contents header text. Replace "In this article:" with wording of your choice in row 5:

```
"<nav role='navigation' class='table-of-contents toc-top'><h4>Quick Links</h4>" + "<ul>";
```

- Change the "In this article" text from an h4 to a div, p, or any other HTML element in row 5. Or remove it. Here, we've changed it to paragraph:

```
"<nav role='navigation' class='table-of-contents toc-top'><p>In this article:</p>" + "<ul>";
```

Create expanding/collapsing sections in an article

Last Modified on 05/29/2024 5:27 pm EDT

Over the years, we've worked up a few different solutions for customers who want to collapse some content by default and then expand it--an accordion structure designed to keep pages looking cleaner so readers can engage with what they are most interested in. Here are a few of the solutions we've come up with, so you can adapt them as you see fit.

Use case

Accordion-style text interaction often seems like a great way to avoid overwhelming your readers. However, we like the guidelines provided by Nielsen-Norman Group: if you are hiding content that would effectively answer your readers' questions, it's not a wise move. User experience research shows that most users prefer to scroll over clicking, which requires more interaction. (The exception to this is, of course, mobile-only or mobile-dominant interactions.) If you're going to implement accordion-style collapses, it's a great time to revisit your internal style guide to set good guidance for when and how they should be used.

Topic display categories

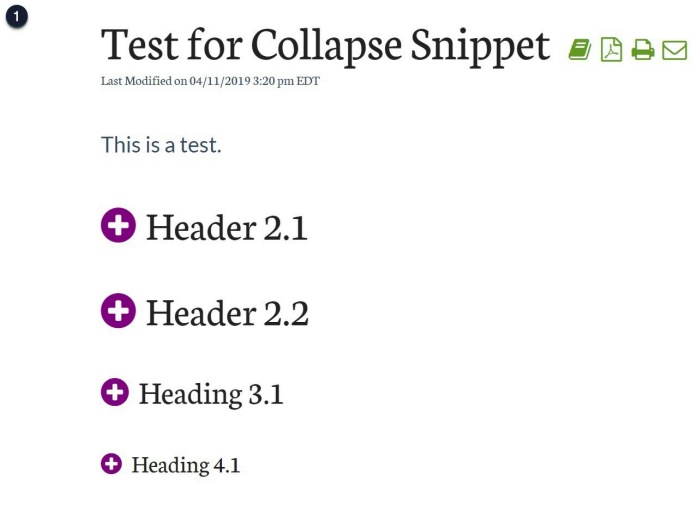


If you aren't familiar with topic display categories, please go check them out before you read on. Topic display categories include a built-in accordion option for the articles they contain, and can often be used instead of these solutions!

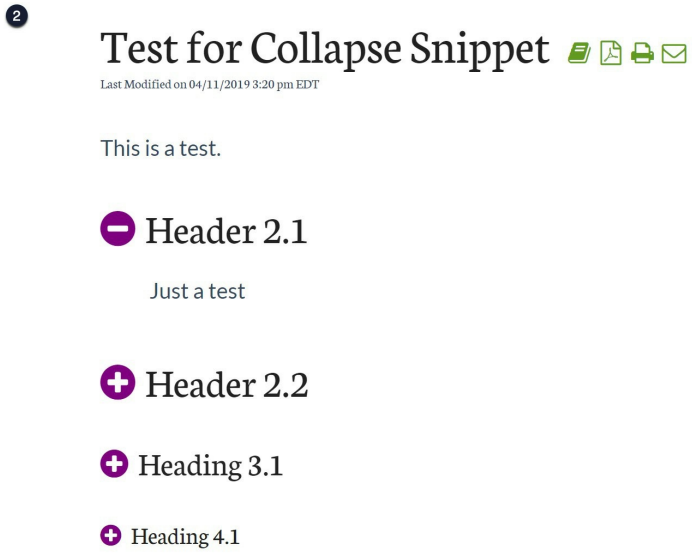
Automatically collapse all text between headers of all sizes

Implementation Method: Snippet created in **Library > Snippets**; snippet mergecode added to relevant articles

This snippet hides any text under every size heading throughout the entire article, which can then be expanded and collapsed using plus/minus toggles:



Initial View



After click to expand top section

Setup and usage

To implement this functionality, create a snippet that handles the logic and styling.

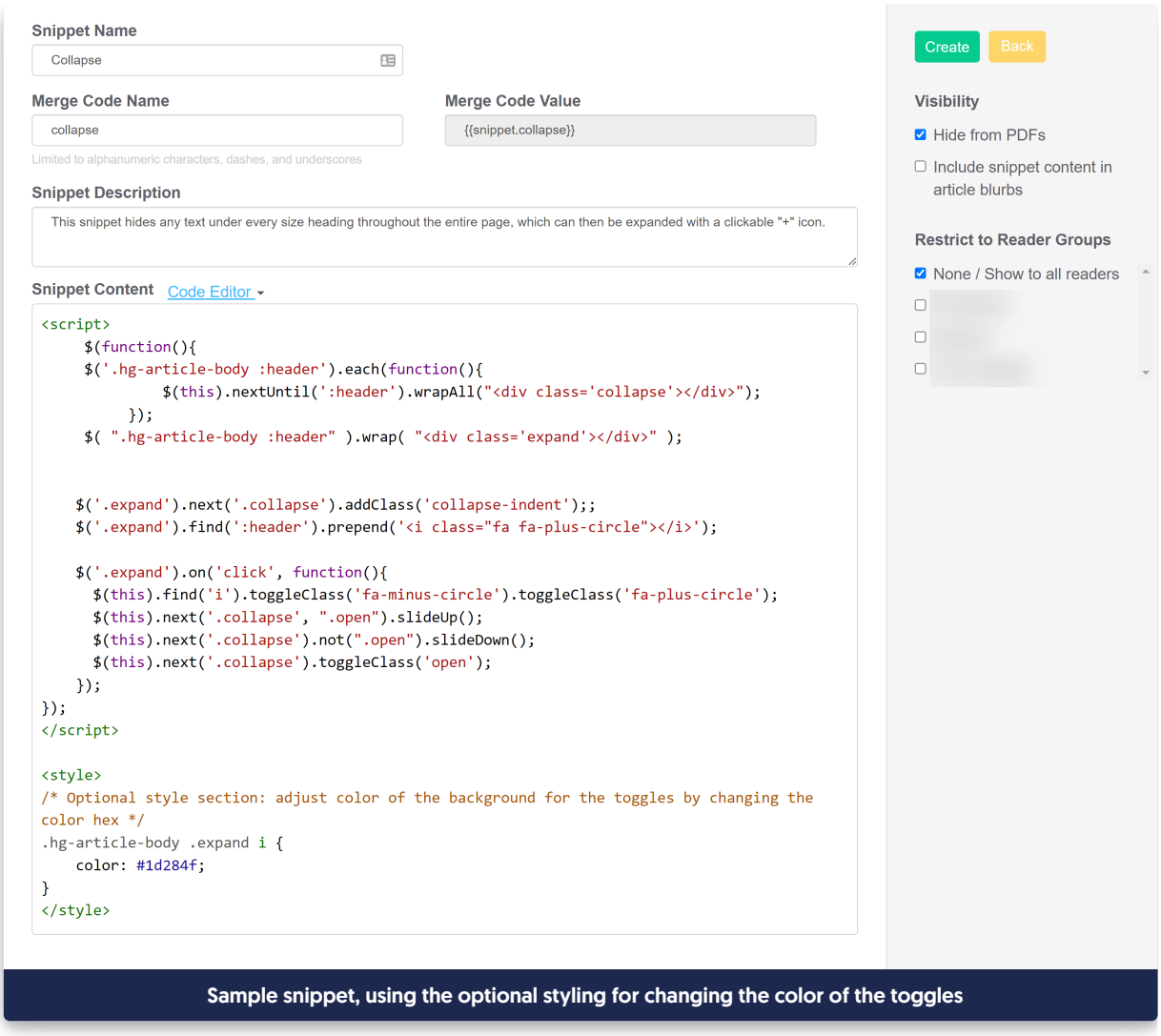
1. **Go to Library > Snippets.**
2. **Click the + Create New Snippet button.**
3. **Give your snippet a name (such as Collapse). The Merge Code Name will auto-generate from the Snippet Name, though you can also override this to something shorter.**
4. **Add a Snippet Description, like: This snippet hides any text under every size heading throughout the entire page, which can then be expanded with a clickable "+" icon.**
5. **Click the dropdown next to Snippet Content to open the Code Editor.**
6. **Copy the script below and paste it into the Code Editor:**

```
<script>
    $(function(){
    $('.hg-article-body :header').each(function(){
            $(this).nextUntil(':header').wrapAll("<div class='collapse'></div>");
        });
    $( ".hg-article-body :header" ).wrap( "<div class='expand'></div>" );


   $('.expand').next('.collapse').addClass('collapse-indent');;
   $('.expand').find(':header').prepend('<i class="fa fa-plus-circle"></i>');

   $('.expand').on('click', function(){
     $(this).find('i').toggleClass('fa-minus-circle').toggleClass('fa-plus-circle');
     $(this).next('.collapse', ".open").slideUp();
     $(this).next('.collapse').not(".open").slideDown();
     $(this).next('.collapse').toggleClass('open');
   });
});
</script>
```

7. **In the Visibility section just below the Save button, check the box next to Hide from PDFs. PDFs do not support expanding/collapsing content in this way. If you don't check this box, the content will be collapsed and unable to be expanded!**

8. ***Optional*: If you'd like to change the color of the plus/minus toggles, copy the code below and paste it into the same Code Editor below the script in Step #6, replacing the color hex with a color of your choice:**

```
<style>
/* Optional style section: adjust color of the background for the toggles by changing the color hex */
.hg-article-body .expand i {
   color: #800080;
}
</style>
```



Sample snippet, using the optional styling for changing the color of the toggles

9. Click the **Create** button (or **Save Changes** if you've already clicked Create).

To apply this style to an article, insert the snippet you created above following the steps in Snippets.

To apply this snippet to all articles:

1. Copy the snippet's merge code.
2. Go to **Settings > Style**.
3. Below the preview pane, be sure **Custom HTML** is selected.
4. Select **Article** from the dropdown.
5. Paste the snippet merge code in anywhere in this template. When in doubt, put it at the bottom.
6. **Save** your changes.

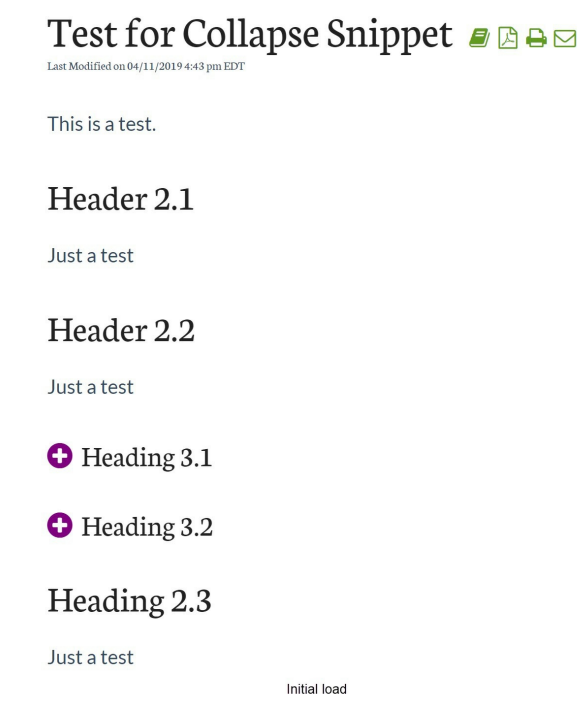
We offer snippets like this as courtesy standalone customizations for your knowledge base. Using multiple snippets together may cause unintended consequences. Please snippet responsibly and remember that some problems are best solved by a developer!

Automatically collapse text between headers of specific sizes

Implementation Method: Snippet created in **Library > Snippets**; snippet mergecode added to relevant articles

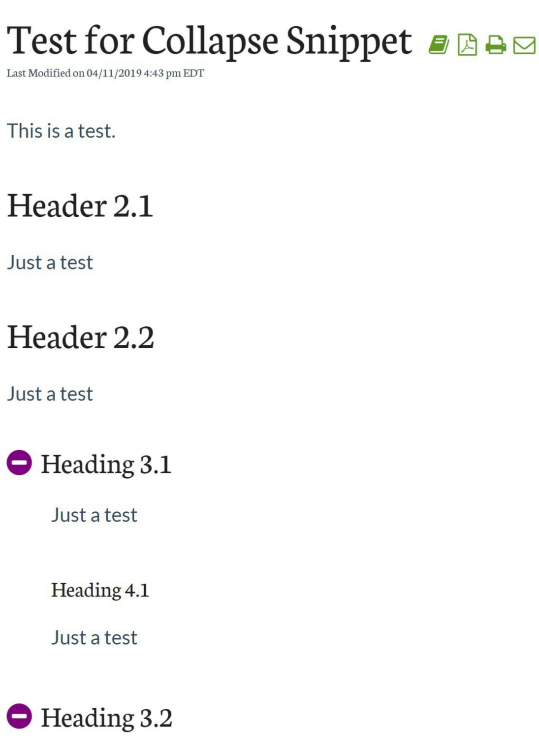
This snippet will collapse all text--including smaller headings--within specific headings into accordions, using plus/minus toggles. It automatically applies to all headings of the specified levels:

1



Initial load

2



After expanding Heading 3s

Note: This script will keep smaller headings' content within the collapsed headings as normal content (no expand/collapse), as seen with Heading 4.1 above.

Setup & Usage

To implement this functionality, create a snippet that handles the logic and styling.

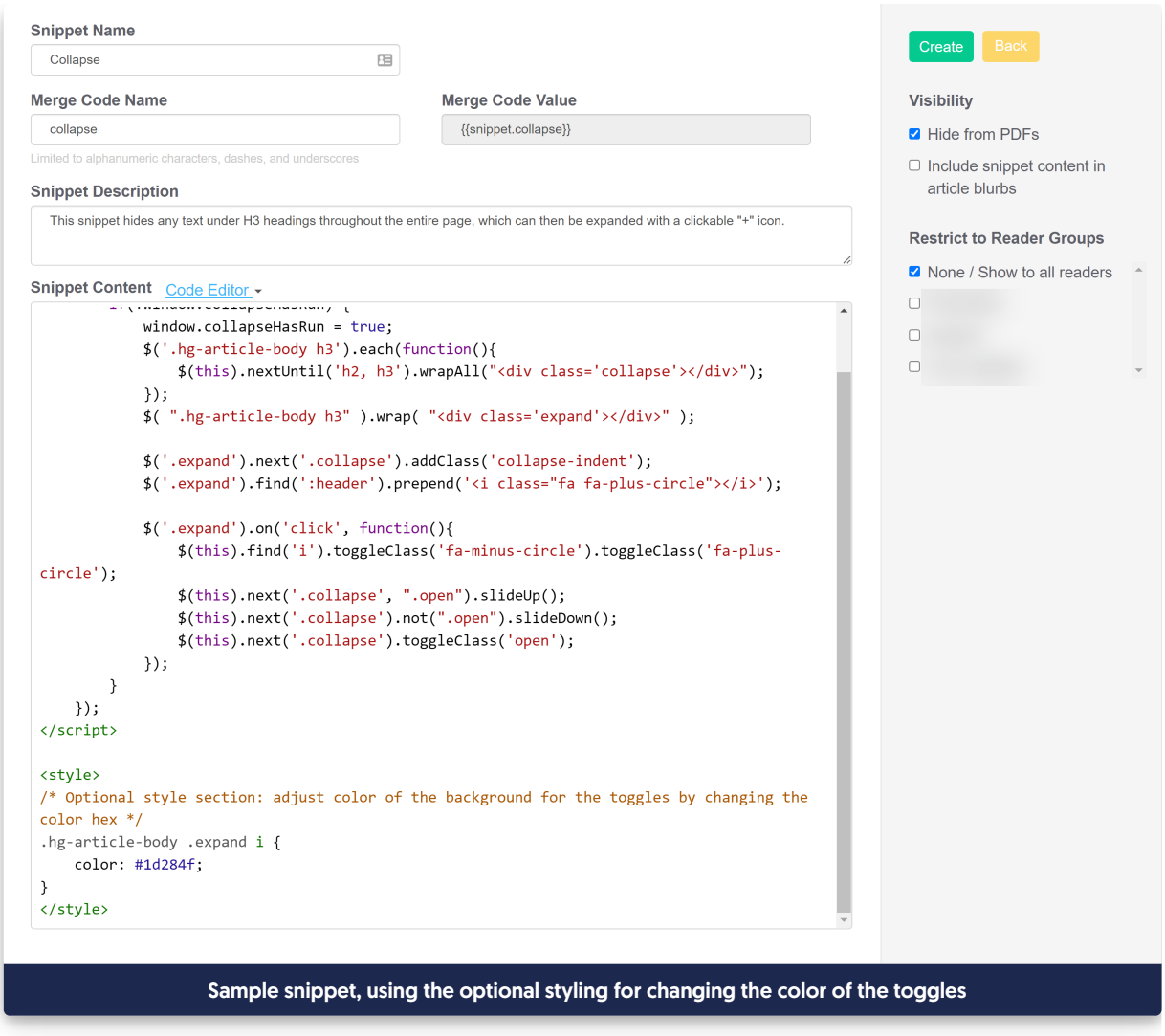
1. Go to **Library > Snippets**.
2. Click the **+ Create New Snippet** button.
3. Give your snippet a name (such as Collapse). The Merge Code Name will auto-generate from the Snippet Name, though you can also override this to something shorter.
4. Add a Snippet Description, like: This snippet hides any text under H3 headings throughout the entire page, which can then be expanded with a clickable "+" icon.
5. Click the dropdown next to **Snippet Content** to open the Code Editor.
6. Copy the script below and paste it into the Code Editor:

```
<script>
   $(function(){
      if(!window.collapseHasRun) {
         window.collapseHasRun = true;
         $('.hg-article-body h3').each(function(){
            $(this).nextUntil('h2, h3').wrapAll("<div class='collapse'></div>");
         });
         $( ".hg-article-body h3" ).wrap( "<div class='expand'></div>" );

         $('.expand').next('.collapse').addClass('collapse-indent');
         $('.expand').find(':header').prepend('<i class="fa fa-plus-circle"></i>');

         $('.expand').on('click', function(){
            $(this).find('i').toggleClass('fa-minus-circle').toggleClass('fa-plus-circle');
            $(this).next('.collapse', ".open").slideUp();
            $(this).next('.collapse').not(".open").slideDown();
            $(this).next('.collapse').toggleClass('open');
         });
      }
   });
</script>
```

7. **In the Visibility section just below the Save button, check the box next to Hide from PDFs. PDFs do not support expanding/collapsing content in this way. If you don't check this box, the content will be collapsed and unable to be expanded!**

8. ***Optional*: If you'd like to change the color of the plus/minus toggles, copy the code below and paste it into the same Code Editor below the script in Step #6, replacing the color hex with a color of your choice:**

```
<style>
/* Optional style section: adjust color of the background for the toggles by changing the color hex */
.hg-article-body .expand i {
   color: #800080;
}
</style>
```



Sample snippet, using the optional styling for changing the color of the toggles

9. Click the **Create** button (or **Save Changes** if you've already clicked Create).

To apply this style to an article, insert the snippet you created above following the steps in Snippets.

To apply this snippet to all articles:

1. Copy the snippet's merge code.
2. Go to **Settings > Style**.
3. Below the preview pane, be sure **Custom HTML** is selected.
4. Select **Article** from the dropdown.
5. Paste the snippet merge code in anywhere in this template. When in doubt, put it at the bottom.
6. **Save** your changes.

We offer snippets like this as courtesy standalone customizations for your knowledge base. Using multiple snippets together may cause unintended consequences. Please snippet responsibly and remember that some problems are best solved by a developer!

Variations

You can adjust this script so that it generates the expand/collapse for a different heading level. To do so, you'll need to update lines 4, 5, and 7 of the script.

Line 4 and line 7: change "h3" to be the heading level you'd like to see the expand/collapse icons at

```
$('.hg-article-body h3').each(function(){
```

```
$( ".hg-article-body h3" ).wrap( "<div class='expand'></div>" );
```

Line 5: Change the list of headings to include all higher-level headings you use before this one, so that higher-level content isn't hidden, as well as the heading level you've selected for the rest of the script:

```
$(this).nextUntil('h2, h3').wrapAll("<div class='collapse'></div>");
```

Here is a sample of what an h5 version of this script looks like:

```
<script>
   $(function(){
      if(!window.collapseHasRun) {
         window.collapseHasRun = true;
         $('.hg-article-body h5').each(function(){
            $(this).nextUntil('h2, h3, h4, h5').wrapAll("<div class='collapse'></div>");
         });
         $( ".hg-article-body h5" ).wrap( "<div class='expand'></div>" );

         $('.expand').next('.collapse').addClass('collapse-indent');
         $('.expand').find(':header').prepend('<i class="fa fa-plus-circle"></i>');

         $('.expand').on('click', function(){
            $(this).find('i').toggleClass('fa-minus-circle').toggleClass('fa-plus-circle');
            $(this).next('.collapse', ".open").slideUp();
            $(this).next('.collapse').not(".open").slideDown();
            $(this).next('.collapse').toggleClass('open');
         });
      }
   });
</script>
```

Collapse/expand any chunk of text with a Read More/Read Less link

Implementation Method: Two snippets created in Library > Snippets to begin and end the collapsed section; Custom HTML added to Settings > Style to style those; snippet mergecodes added to relevant articles

The previous chunks of code all automatically collapse chunks of text. If you'd rather be able to control exactly which sections of text are expanded and collapsed, this code will work better for you. This code will work when the Begin Snippet is used on a blank line or in some type of regular paragraph text. If you'd like an expand/collapse to appear after a header, see the alternate version for headers below.



Note: this is the set of snippets used just below.

Here, we use it with the same plus and minus signs as before, but with a Read More/Read Less text:

1



Collapsed

2



Expanded

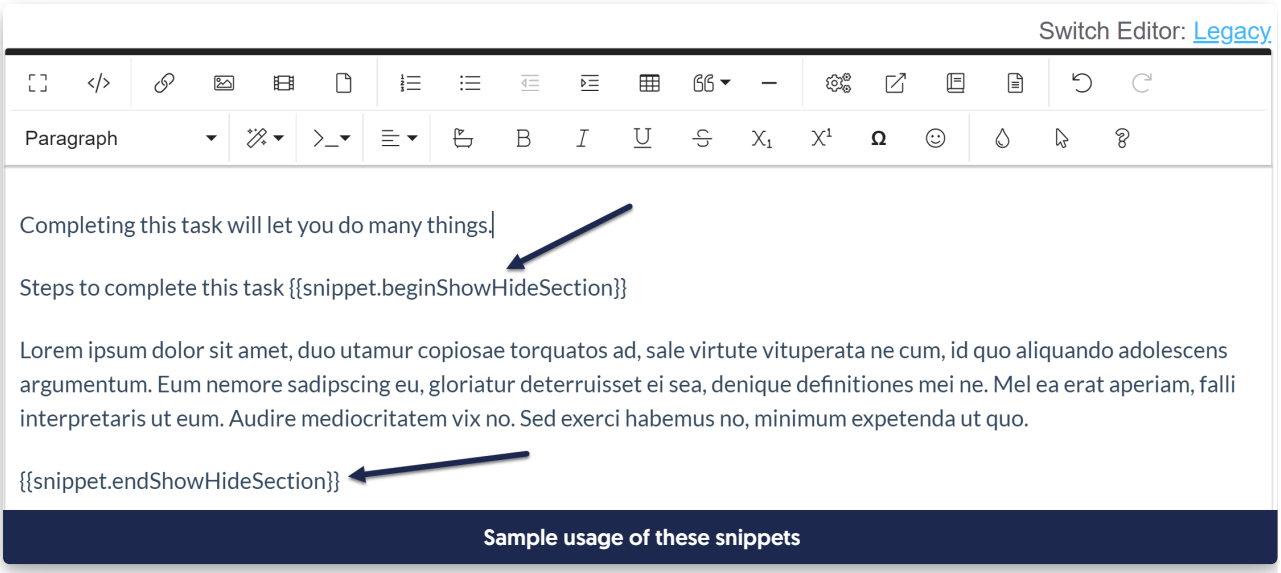
Setup and usage

To implement this functionality, create two snippets to handle the styling and expand/collapse logic and edit Custom HTML in **Style > Settings** to handle the rest of the logic. Click "Read more" below to see the full steps. 😉

To apply this style to an article, insert the beginShowHideSection snippet before the text you want to be collapsed, and the endShowHideSection snippet where you want the collapsing section to end using the steps in Snippets.

We offer snippets like this as courtesy standalone customizations for your knowledge base. Using multiple snippets together may cause unintended consequences. Please snippet

responsibly and remember that some problems are best solved by a developer!



Sample usage of these snippets

Variations

You can adjust the "Read More" and "Read Less" text by updating the text used in the script added to Settings > Style. Here, we replace them with "Expand" and "Collapse":

```
<script>
$(function(){
   $('.toggle').each(function(){
      $(this).prev().append('<a href="" class="toggleLink">Expand <i class="fa fa-plus-circle"></i></a>');
   });
    $('.toggleLink').click(function(){
       if($(this).hasClass('toggle-open') == false){
         $(this).html('Collapse <i class="fa fa-minus-circle"></i>').addClass('toggle-open');
          $(this).parent().next('.toggle').show();
      }else{
         $(this).html('Expand <i class="fa fa-plus-circle"></i>').removeClass('toggle-open');
          $(this).parent().next('.toggle').hide();
      }
   });
});
</script>
```

You can change the plus and minus icons, as well. Here, we change them to a right arrow and an up arrow:

```
<script>
$(function(){
   $('.toggle').each(function(){
      $(this).prev().append('<a href="" class="toggleLink">Read More <i class="fa fa-arrow-right"></i></a>');
   });
    $('.toggleLink').click(function(){
       if($(this).hasClass('toggle-open') == false){
         $(this).html('Read Less <i class="fa fa-arrow-up"></i>').addClass('toggle-open');
          $(this).parent().next('.toggle').show();
      }else{
         $(this).html('Read More <i class="fa fa-arrow-right"></i>').removeClass('toggle-open');
          $(this).parent().next('.toggle').hide();
      }
   });
});
</script>
```



These are using KnowledgeOwl's FontAwesome icon offerings. You can upload your own icons for this purpose or use other FontAwesome icons.

Collapse/expand text after a header with a +/- option next to the header

Implementation Method: Two snippets created in Library > Snippets to begin and end the collapsed section; Custom HTML added to Settings > Style to style those; snippet mergecodes added to relevant articles

This code works much like the Read More/Read Less code above, except it can be used to place a + or - on the same line as a header:





The begin snippet is actually placed on the line *before* the section you want to have expand/collapse, and the code will look for the children of that section and collapse them. This is specifically for use with headers, and you can't combine this method with the other expand/collapse mentioned above.

Setup and usage

We offer snippets like this as courtesy standalone customizations for your knowledge base. Using multiple snippets together may cause unintended consequences. Please snippet responsibly and remember that some problems are best solved by a developer!

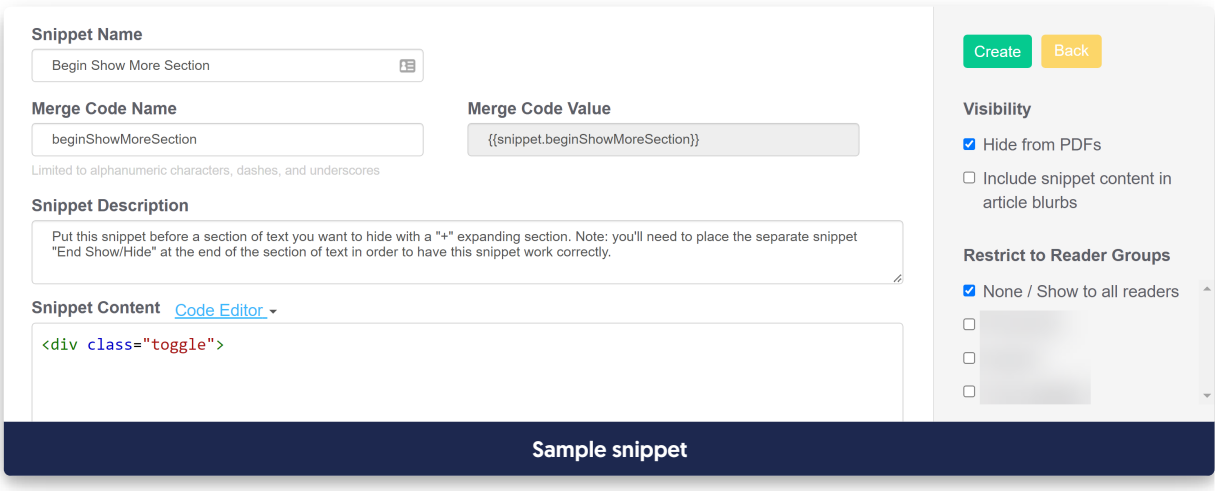
To implement this functionality, create two snippets to handle the styling and expand/collapse logic and edit Custom HTML in Style > Settings to handle the rest of the logic.

1. **Go to Library > Snippets.**
2. **Click the + Create New Snippet button.**
3. **Give your snippet a name (such as Begin Show/Hide Section). The Merge Code Name will auto-generate from the Snippet Name, though you can also override this to something shorter.**
4. **Add a Snippet Description, like: Put this snippet before a section of text you want to hide with a "+" expanding section. Note: you'll need to place the separate snippet "End Show/Hide" at the end of the section of text in order to have this snippet work correctly.**
5. **Click the dropdown next to Snippet Content to open the Code Editor.**
6. **Copy the script below and paste it into the Code Editor:**

```
<div class="toggle">
```

7. **In the Visibility section just below the Save button, check the box next to Hide from PDFs. PDFs do not support expanding/collapsing content in this way. If you don't check this box, the content will be**

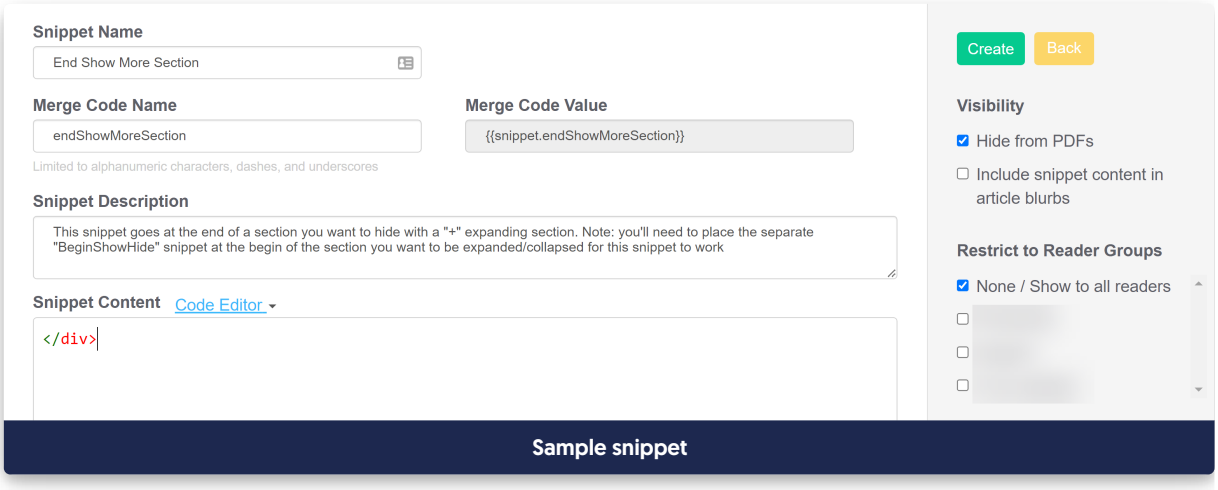
collapsed and unable to be expanded!



8. Click the **Create** button (or **Save Changes** if you've already clicked Create).
9. Create another new snippet.
10. Give your snippet a name (such as End Show/Hide Section). The Merge Code Name will auto-generate from the Snippet Name, though you can also override this to something shorter.
11. Add a Snippet Description, like: This snippet goes at the end of a section you want to hide with a "+" expanding section. Note: you'll need to place the separate "BeginShowHide" snippet at the begin of the section you want to be expanded/collapsed for this snippet to work correctly.
12. Click the dropdown next to **Snippet Content** to open the Code Editor.
13. Copy the script below and paste it into the Code Editor:

```
</div>
```

14. In the **Visibility** section just below the Save button, check the box next to **Hide from PDFs**. PDFs do not support expanding/collapsing content in this way. If you don't check this box, the content will be collapsed and unable to be expanded!

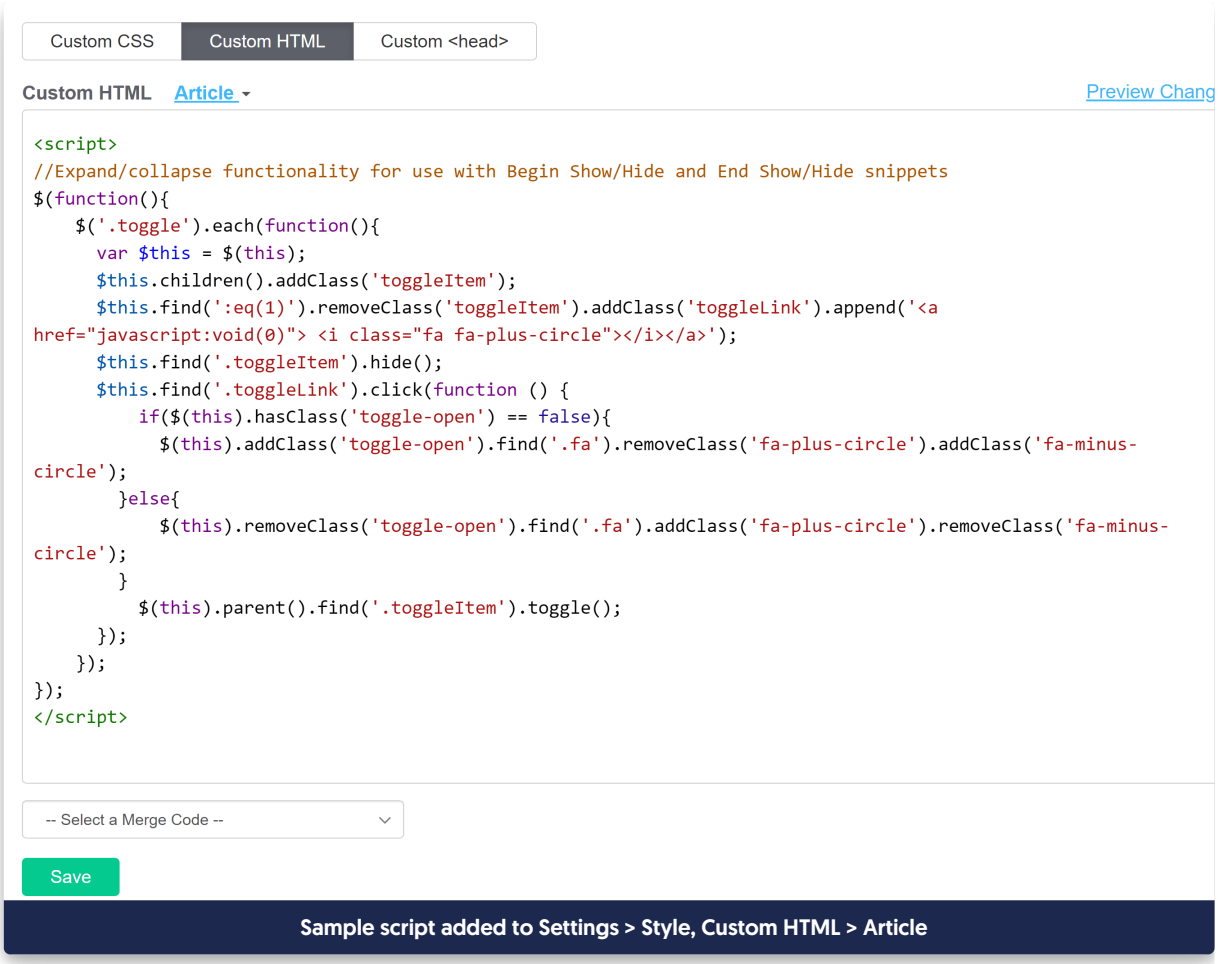


15. Click the **Create** button (or **Save Changes** if you've already clicked Create).

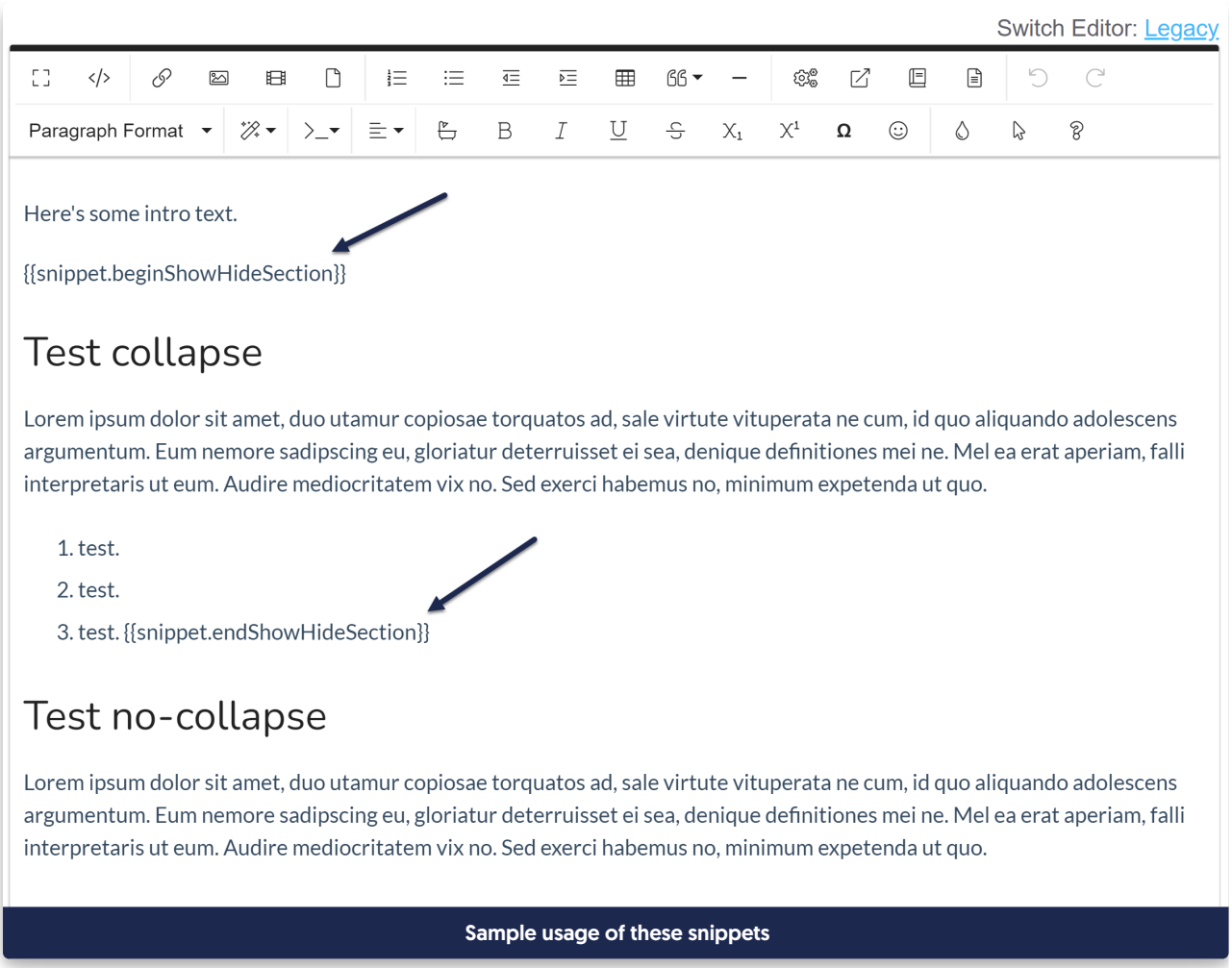
16. Go to **Settings > Style.**
17. Click on **Custom HTML.**
18. Select **Article** from the dropdown.
19. Paste this script into the bottom of the Custom HTML editor:

```
<script>
//Expand/collapse functionality for use with Begin Show/Hide and End Show/Hide snippets
$(function(){
   $('.toggle').each(function(){
     var $this = $(this);
     $this.children().addClass('toggleItem');
     $this.find(':eq(1)').removeClass('toggleItem').addClass('toggleLink').append('<a href=""> <i class="fa fa-plus-
     $this.find('.toggleItem').hide();
     $this.find('.toggleLink').click(function () {
        if($(this).hasClass('toggle-open') == false){
          $(this).addClass('toggle-open').find('.fa').removeClass('fa-plus-circle').addClass('fa-minus-circle');
       }else{
          $(this).removeClass('toggle-open').find('.fa').addClass('fa-plus-circle').removeClass('fa-minus-circle');
       }
        $(this).parent().find('.toggleItem').toggle();
     });
   });
});
</script>
```

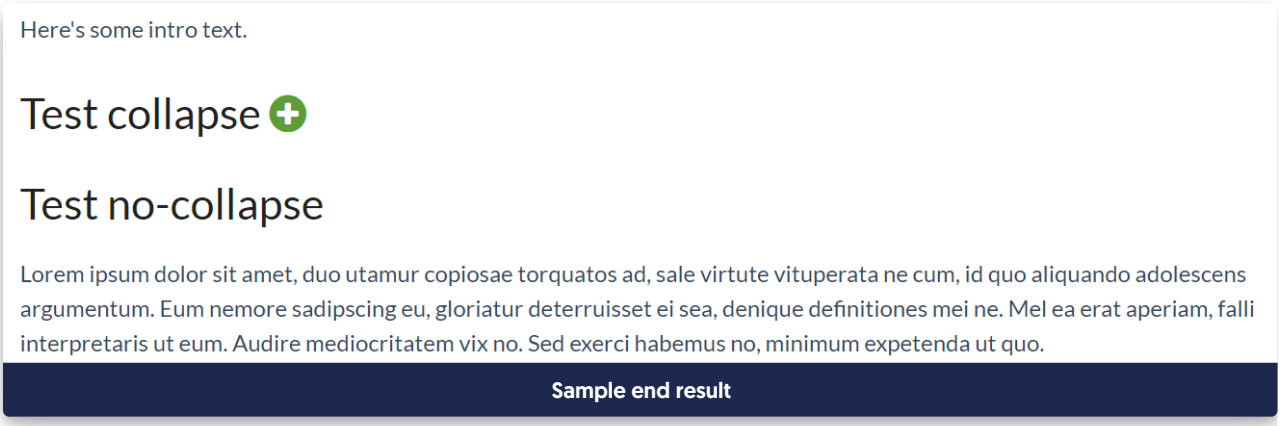
20. Click **Save.**



To apply this style to an article, insert the beginShowHideSection snippet before the header whose content you'd like to collapse, and the endShowHideSection snippet where you want the collapsing section to end using the steps in Snippets.



The above layout will produce:



Adjust line spacing

Last Modified on 05/29/2024 5:27 pm EDT

By default, the line spacing, or line-height CSS attribute, is set to 1.5 for maximum web readability. This number basically gets multiplied with the current font-size to determine the actual line spacing/height that is displayed.

You can adjust the line-height of your text by adjusting the line-height using Custom CSS. To do so:

1. Go to **Settings > Style**.
2. Below the preview pane, be sure the **Custom CSS** tab is selected.
3. Copy the code below and paste it into your Custom CSS field.

```
.hg-article-body p,
.hg-article-body,
.hg-article {
  line-height: 2.0;
}
```

4. Replace 1.5 with the line-height measure you'd like to use. You can use a pixel measure (e.g. 25px); a number (like 1.2, 2.0, etc.); or a percent of the current font size (e.g. 90%). If you're unfamiliar with this CSS, see the w3 Schools page on line-height for more information or reach out to our support team. These settings will be applied to all articles.
5. Save your changes.

Your Custom CSS might look like this:



Format numbered list spacing and borders

Last Modified on 05/29/2024 5:28 pm EDT

If you are using numbered lists to outline steps, you can adjust the formatting of your lists using some simple CSS. Adjusting these styles can help you consistently format lists with the same spacing and borders across your entire knowledge base. This can keep your content more consistent and help keep your knowledge base content matching official branding/style guidelines.

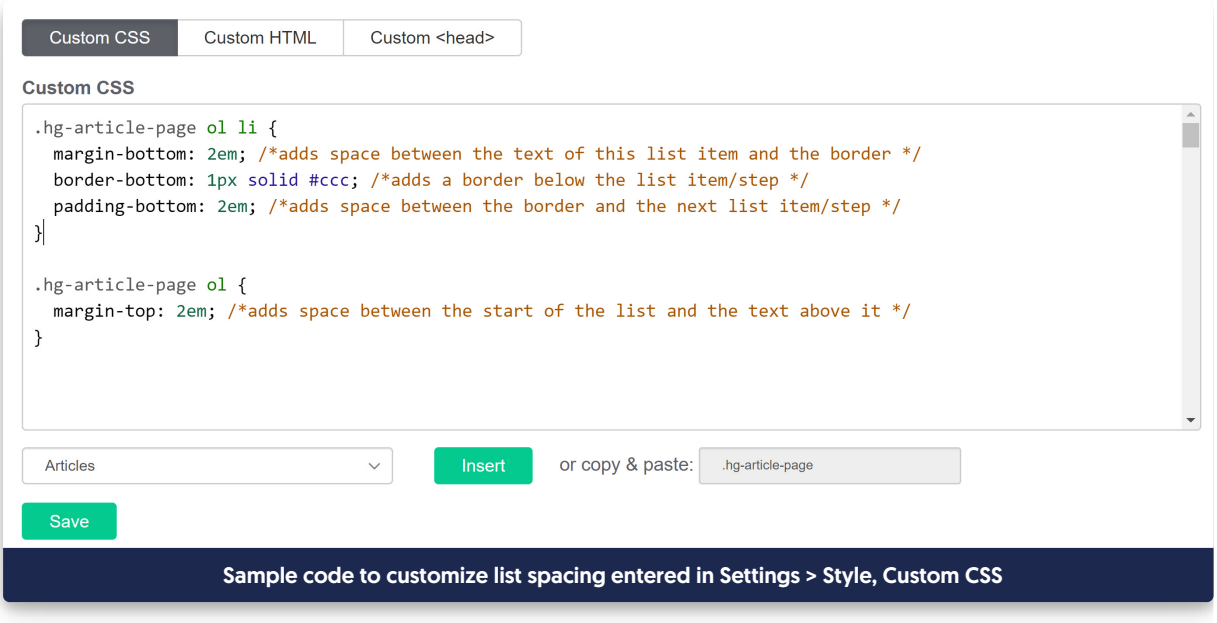
Adjust spacing and add a border between steps

This sample code which will add spacing and a border between your numbered steps. Customize it to get the list format you've always wanted!

1. Go to **Settings** > **Style**.
2. Scroll down to **Custom CSS**.
3. Paste the following code into the CSS:

```
.hg-article-page ol li {
 margin-bottom: 2em; /*adds space between the text of this list item and the border */
 border-bottom: 1px solid #ccc; /*adds a border below the list item/step */
 padding-bottom: 2em; /*adds space between the border and the next list item/step */
}

.hg-article-page ol {
 margin-top: 2em; /*adds space between the start of the list and the text above it */
}
```

Here's a sample of what that looks like:



4. Click **Save.**

Here is what your lists might look like before you applied this change:

1. Item 1
2. Item 2
3. Item 3
4. Item 4

Text in a paragraph following a list.

Text in a paragraph preceding a list.

1. Item 1 in a second list
2. Item 2 in a second list.

And after you applied it:

1. Item 1

2. Item 2

3. Item 3

4. Item 4

Text in a paragraph following a list.

Text in a paragraph preceding a list.

1. Item 1 in a second list

2. Item 2 in a second list.

If you'd like to apply these kinds of changes to a bulleted list instead of a numbered list, adjust the CSS to apply to ul instead of ol:

```
.hg-article-page ul li {
  margin-bottom: 2em; /*adds space between the text of this list item and the border */
  border-bottom: 1px solid #ccc; /*adds a border below the list item/step */
  padding-bottom: 2em; /*adds space between the border and the next list item/step */
}

.hg-article-page ul {
  margin-top: 2em; /*adds space between the start of the list and the text above it */
}
```

Customize nested numbered list styles

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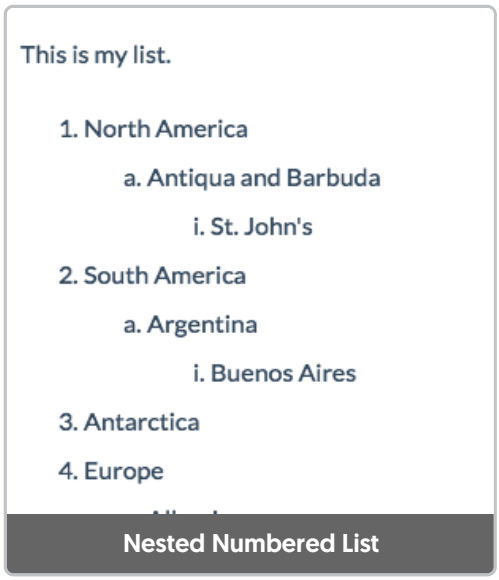
By default, numbered lists with nested/indented items will display with the same numeric format as the main list. You can use custom CSS styles to globally set how your nested numbered list items display. This can be a great way to guarantee that all numbered lists follow your official/branded guidelines for numbered list styles.

Set different levels of nested items to different display types

You might want to keep your main numbers as the standard decimal (1, 2, 3), but the second level to be lower-case letters (a, b, c), and the third level to be lower-case Roman numerals (i, ii, iii). For example:



Nested Numbered List

To achieve the above styles:

1. Go to **Settings** > **Style**.
2. Go to **Custom CSS**.
3. Add this Custom CSS:

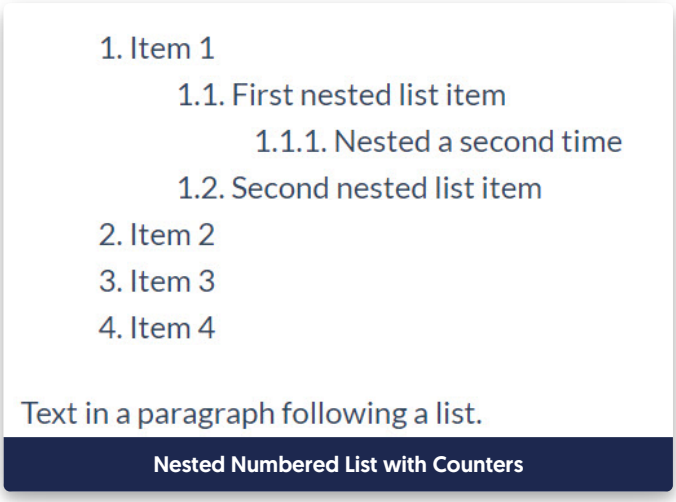
```
/* -- Nested List  -- */

/* Set the first layer of list items to regular numeric decimals */
.hg-article-body ol {
   list-style-type: decimal;
}

/* Set the second layer of list items to lowercase alphabetic */
.hg-article-body ol > li > ol {
   list-style-type: lower-alpha;
}

/* Set the third layer of list items to lowercase Roman numerals */
.hg-article-body ol > li > ol > li > ol {
   list-style-type: lower-roman;
}
```

4. Click **Save**.

Looking for a particular number format? See the W3 Schools page on CSS list-style-types for additional options.

Use nested numbers with counters

You might want to use all numbers, but have each indented layer add a .+number onto it. For example:



Nested Numbered List with Counters

To achieve the above styles, you can use a counter within the numbered list, so that it numbers the 1.x and 1.1.x strings, etc., based on the count and position of the list items:

1. Go to **Settings** > **Style**.
2. Go to **Custom CSS**.
3. Add this Custom CSS:

```
/* Styles for formatting sub-ordered-list-items with 1.1., 1.1.1., etc.)*/

/* First, set all numbered lists to use counter-reset */
.hg-article-body ol {
    counter-reset: item;
}

/* Display all list items in a numbered list in block display */
.hg-article-body ol>li {
    display: block;
}

/* Use a counter that checks the number of items and adds a "." between them and ends with ". " */
.hg-article-body ol>li:before {
    content: counters(item, ".") ". ";
    counter-increment: item;
}
```

4. Click **Save**.

Use thumbnails and banner images

Last Modified on 08/21/2024 2:43 pm EDT

No automatic display
Thumbnail and banner images won't be displayed anywhere in your knowledge base automatically.

You can add one or both to your **Custom HTML Article** template using merge codes. To do so:

1. Go to **Settings > Style**.
2. In the **Customize HTML, CSS, and JS** section, select **Custom HTML**.
3. Select **Article** from the **Select HTML section to edit** dropdown.
4. Put your cursor where you'd like to insert the banner or thumbnail.
5. Copy the merge code you want to add:
    a. Banner:

```
[article("banner")]
```

    b. Thumbnail:

```
[article("thumbnail")]
```

6. Paste it where you'd like it to be displayed in your article.
    a. For example, you may want to put the banner in the article header and display the thumbnail next to the title:

```
<div class="hg-article">
  <div class="hg-article-header">
  [article("thumbnail")]
    [article("banner")]<h1 class="hg-article-title">[article("title")][article("action_icons")]</h1>
    <div class="metadata">
```

7. Be sure to **Save** your settings.

Styling your banner and thumbnail

You may need to rework the custom HTML a bit or add some custom CSS to size/style the images

appropriately. For CSS, you can use these classes:

- **Banner image class:** `.article-banner`
- **Thumbnail image class:** `.article-thumbnail`

For example, adding this Custom CSS would place the banner above and display the article thumbnail inline with the article title:

```
.article-banner {
  max-width: 100%;
}

.article-thumbnail {
  display: inline-block;
  width: 25px;
  vertical-align: inherit;
  margin-right: 1em;
}

.hg-article-page .hg-article-title {
  display: inline-block;
}
```

Update your article actions merge code

Last Modified on 08/21/2024 2:35 pm EDT

Until December 2022, the icon hyperlinks next to the article header to print, email, and view the article's PDF were hard-coded HTML added to **Settings > Style, Custom HTML > Article:**

```
<div class="hg-article">
   <div class="hg-article-header">
      <h1 class="hg-article-title">[article("title")]<span class="ko-article-actions"><span class="pdf" title="PDF">[art
```

If you wanted to hide one or more of those options, you either needed to remove or comment out the HTML.

In December 2022, we streamlined this format by replacing all that hard-coded HTML with a single merge code:

```
[article("action_icons")]
```

This merge code proactively creates that HTML and does so in a more consistent structure.

We suggest all customers with knowledge bases that pre-date this change update their Article HTML to use that new merge code.

To do so:

1. Go to **Settings > Style**.
2. In the **Customize HTML, CSS, and JS** section, select **Custom HTML**.
3. Select **Article** from the **Select HTML section to edit** dropdown.
4. Find the section of your article HTML that contains a span with class="ko-article-actions". You'll want to remove this entire span, which generally runs from after the article title to the </h1> tag. Here's a sample of the HTML you'll want to delete:

   ```
   <span class="ko-article-actions"><span class="pdf"></span><a href="#" class="ko-js-print"><i class="fa fa-p
   ```

5. Highlight that HTML and delete it.
6. Copy the merge code below and paste it in where that ko-article-actions span used to be.

   ```
   [article("action_icons")]
   ```

7. **So we might now have:**

```
<div class="hg-article">
  <div class="hg-article-header">
    <h1 class="hg-article-title">[article("title")][article("action_icons")]</h1>
```

8. **Save your changes once you're done.**

9. **If you'd like to hide any of these icons in all articles across your knowledge base, follow the instructions at Remove the PDF, print, or email icon from all articles.**

Remove the PDF, print, or email icon from all articles

Last Modified on 05/29/2024 5:28 pm EDT

By default, all KnowledgeOwl knowledge bases are set up to have three icons displayed next to each article's title:

- A **PDF** icon: Downloads the PDF of the currently displayed article
- A **printer** icon: Opens the browser's print dialog
- An **envelope** icon: Opens a new email using the end-user's default email program, with the hyperlink for the currently displayed article included in the body

You can remove the PDF icon in individual articles using the checkbox in the **Restrictions**.

But if you'd like to disable one or more of these icons across your entire knowledge base, you can!

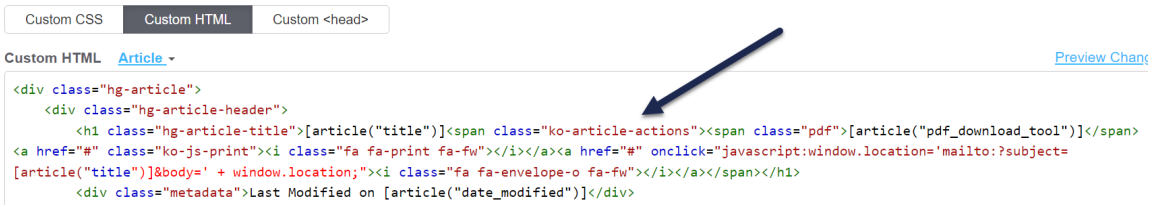
First, you'll need to check out **Settings > Style** to figure out which article-actions configuration your knowledge base is using, and then edit the Style Settings differently depending on which setup you're using.

To do so:

1. Go to **Settings > Style**.
2. Below the Preview pane, be sure **Custom HTML** is selected.
3. Select **Article** from the Custom HTML dropdown.
4. Now look carefully at the custom HTML displayed after hg-article-title to figure out which solution you need to use:
    - If your Custom Article HTML includes a span with class="ko-article-actions": You're using our older, hard-coded article actions. See **Hard-coded HTML article action** below. Your HTML may look like this:



    - If your Custom Article HTML includes the `[article("action_icons"]` merge code, you're using our newer action icons merge code. See **Action icons merge code** below.



Hard-coded HTML article action

If your knowledge base is using the hard-coded HTML article action, first, consider updating it to use the action_icons merge code.

If you don't want to update to use the new merge code, you'll need to look at the HTML there and either delete or comment out the HTML for the icon you want to remove globally. To comment out HTML, add a `<!--` before the start of the HTML and a `-->` at the end of it. For example, here we've commented out the HTML for the PDF action icon:



Once you've edited the **Custom HTML** to remove or comment out the icon(s) you don't need, be sure to **Save** your changes.

Hide the PDF action icon

To hide the PDF action icon, you'll want to delete or comment out this HTML:

```
<span class="pdf"></span>
```

Hide the print action icon

To hide the print action icon, you'll want to delete or comment out this HTML:

```
<a href="#" class="ko-js-print"><i class="fa fa-print fa-fw"></i></a>
```

Hide the email action icon

To hide the email action icon, you'll want to delete or comment out this HTML:

```
<a href="#" onclick="javascript:window.location='mailto:?subject=Remove the PDF, print, or email icon from all article
```

Action icons merge code

If you're using the action_icons template merge code, you don't need to edit any HTML. To remove one of the action icons across your entire knowledge base:

1. In **Settings > Style**, select **Custom CSS** below the Preview Pane.
2. Copy the appropriate CSS for the icon you'd like to hide from the sections below.
3. Paste that CSS anywhere into your Custom CSS.
4. **Save** your changes.

Hide the PDF action icon

To hide the PDF action icon, copy the CSS below and paste it in using the steps outlined above:

```
/* Hide PDF article action icon globally */
.ko-article-actions .pdf {display:none;}
```

Hide the print action icon

To hide the print action icon, copy the CSS below and paste it in using the steps outlined above:

```
/* Hide print article action icon globally */
.ko-article-actions .print-article {display:none;}
```

Hide the email action icon

To hide the email action icon, copy the CSS below and paste it in using the steps outlined above:

```
/* Hide email article action icon globally */
.ko-article-actions .email-article {display:none;}
```

Fix for article editor removing a script

Last Modified on 05/29/2024 5:27 pm EDT

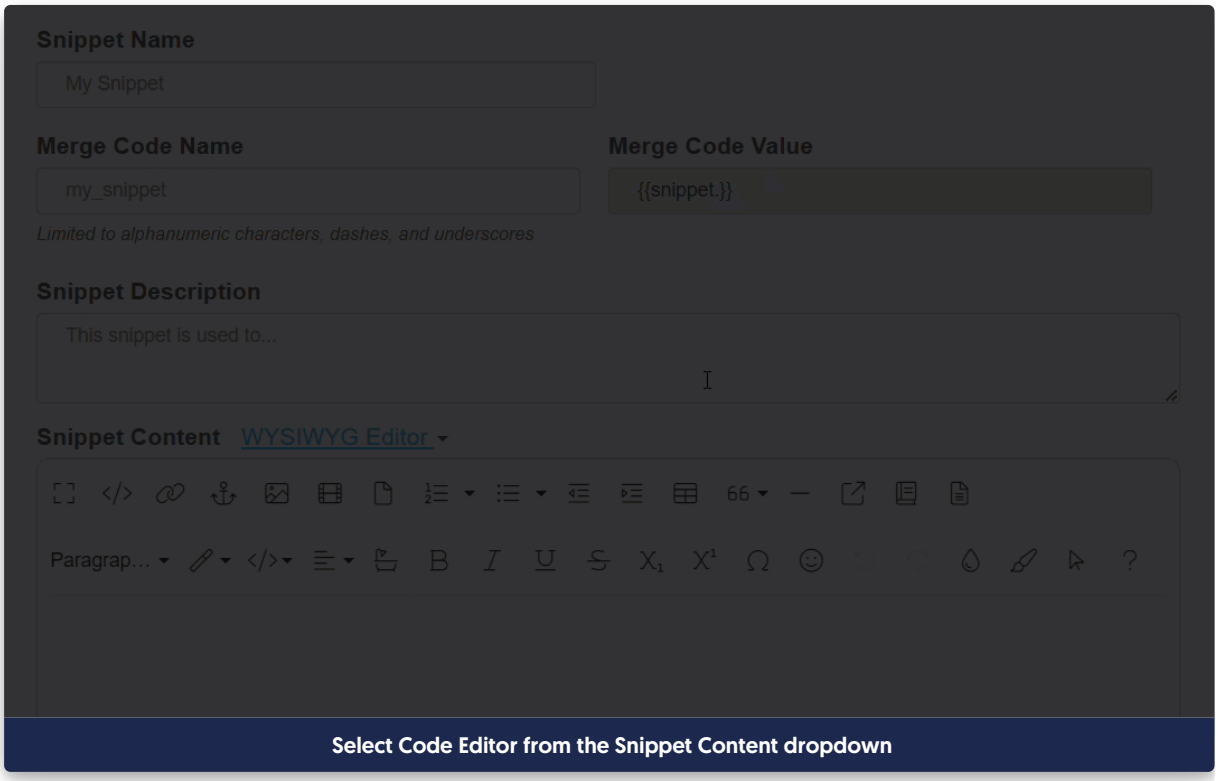
The article editor does its best to ensure that you have valid HTML in your article. Unfortunately, sometimes it can be a little heavy-handed with how it interprets "valid" HTML. Sometimes, it can remove a custom script you've added.

We've seen this happen most often with scripts that use their own HTML tags, such as:

- Tableau
- Redocly

As a workaround to this issue, you can:

1. Create a snippet to put the script into.
2. When you are creating the snippet, select the dropdown next to **Snippet Content** and select **Code Editor** instead of **WYSIWYG Editor**:



Select Code Editor from the Snippet Content dropdown

3. Paste your script in.
4. Keep the snippet in **Code Editor** whenever you open it. This particular Code Editor bypasses all of the HTML-cleaning functions that the WYSIWYG Editor has, so your script will stay whole and functional.
5. Once you've finished creating the snippet, you can insert that snippet into any article where you need the

script to run.

You can see more how to set this up in our Wisdom Wednesday recording on the topic (this particular solution is the third and final use case discussed in that video!)

Fix email article for articles with apostrophes

Last Modified on 05/29/2024 5:28 pm EDT

Customers sometimes run into an issue where the email option does not work on certain articles. The most common culprit is an apostrophe in the article title, which breaks our legacy code for the email option.



We've fixed the issue for new themes, but existing customers might still run into this issue. Luckily it's an easy fix!

1. Go to **Settings > Style**.
2. Below the preview pane, click on the **Custom HTML** tab.
3. In the Custom HTML dropdown, select **Article** to edit the article html template.
4. Replace this section:

```
<a href="#" onclick="javascript:window.location='mailto:?subject=[article("title")]&body=' + window.location;">
```

With this:

```
<script>function sendEmail() {var title = '[article("title")]'.replace("'","\'").replace("'", "\'");window.location = 'ma
```

5. **Save.**

Now you should be able to email those articles with apostrophes!

Make the PDF icon prettier

Last Modified on 05/29/2024 5:28 pm EDT

If you're using the Clayton, Classic, or Modern themes, your PDF icon next to article titles might look like this:



You can replace it with a Font Awesome icon that will match the other icons next to the article:



(The color of the icon will depend on your knowledge base settings.)

To do so:

1. Go to **Settings > Style**.
2. Below the preview pane, be sure **Custom HTML** is selected.
3. From the Custom HTML dropdown, select **Article**.
4. Copy the code below and paste it into the very bottom of the template:

```
<script>
 //Update PDF icon so it uses Font Awesome PDF icon
 $(function() {
   $('.hg-article-pdf img').replaceWith('<i class="fa fa-file-pdf-o fa-fw"></i>');
 });
</script>
```

5. You can **Preview Changes** and use the preview dropdown at the top to see your article with the new icon.
6. Be sure to **Save** your changes.

Here's what the code might look like entered in your custom HTML:

Custom CSS | Custom HTML | Custom <head>

Custom HTML Article

```
    <div class="hg-article-footer">
        [template("rating")]
        [template("comments")]
    </div>
</div>

<script>
  //Update PDF icon so it uses Font Awesome PDF icon
  $(function() {
    $('.hg-article-pdf img').replaceWith('<i class="fa fa-file-pdf-o"></i>');
  });
</script>
```

Conditional content based on tags

Last Modified on 05/29/2024 5:27 pm EDT

Here we describe how to display one of any number of snippets based on the tags an article has. Some comfort playing with code is required, but no coding knowledge is needed - we will give you everything you need, just follow these steps.

You may have alerts or other content that you only want displayed in certain circumstances. For example, maybe your articles fall into various plan or privacy levels that your customer service employees should be aware of when advising a customer. The uses for this tutorial are versatile and varied.

For the purposes of this article, let's role-play - my knowledge base is for a customer service team for a product that has three plan levels: Basic, Pro and Extreme. Each of the articles in my knowledge base is only relevant to one of these plan levels.



Note: Once you have completed these setup steps, the display of these snippets depends on the tags an article has. Instead of using tags, you could just manually insert the snippet that is relevant to the article each time. This setup is only useful if you already do or plan to use tags to identify articles this way. Also, the use of tags means articles can be bulk edited, and the tags are visible in search results too.

The overall steps to set this up are:

1. Create the conditional content you want to display in individual snippets.
2. Create tags for each snippet.
3. Edit your Article HTML template to include all your snippet merge codes.
4. Add a script that will look at a given article's tags and determine which snippet's content to display.

Each step is explained in detail below.

Create your conditional content & tags

Before we do anything else, we should prepare our conditional content and create our tags.



We are using **three** tags & snippets here, but you can use as many as you like.

1. Start by creating your conditional content, each one in its own snippet. If you're new to creating snippets, check out Creating a snippet.

- Alert boxes work really well for this, but you can include whatever content you like - the snippet WYSIWYG editor has all the same features as our article editor.
- You could also use topic articles for your conditional content, if that suits your use case better.

2. Once your snippets are created, copy each snippet's merge code to a text editor of your choice. We'll need them later.
3. Now create and add your tags to your articles. In this example, I have three tags for my three plan levels - "Basic Plan", "Pro Plan" and "Extreme Plan". You can learn more about adding and managing tags here.
   - Each article should only have one of these tags. If it has more than one, the last tag in the list is the only one that will be used.
   - The article may have other tags that aren't used for conditional content. They won't impact how all of this works.

Add code to your article HTML template

Now that you have your content and tags ready, we need to add the snippets to our article HTML template. This helps pull in those pieces of content into all your articles so that the tags and the script will select which of the snippets to display in each article.

To do so:

1. Go to **Settings > Style**.
2. Below the preview pane, be sure **Custom HTML** is selected.
3. In the Custom HTML dropdown, select **Article**.
4. Right near the top, look for `<div class="hg-article-header">`. Copy the code below and paste it in just below that:

```
<div class="article-tags">[template("article-tag-names")]</div>
```

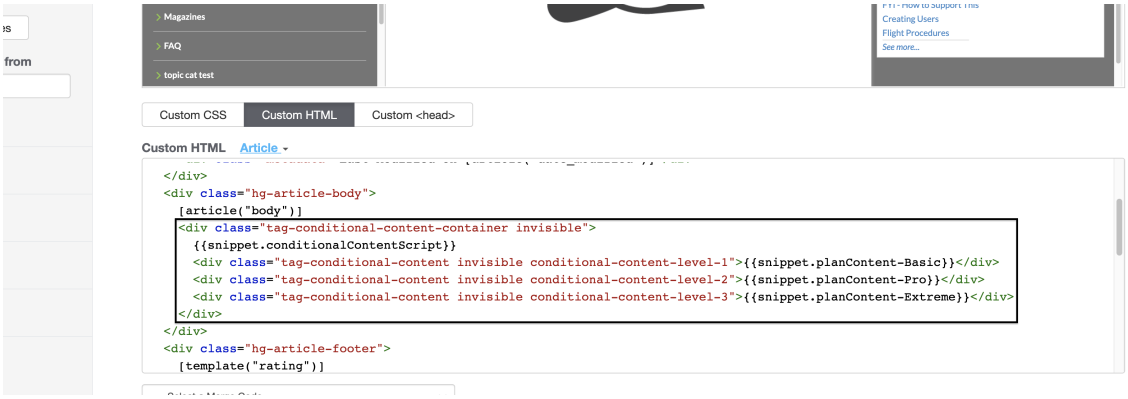


5. A little further down, look for `[article("body")]`. Copy the code below and paste it in directly below that:

```
<div class="tag-conditional-content-container invisible">
  {{snippet.conditionalContentScript}}
  <div class="tag-conditional-content invisible conditional-content-level-1">MERGE CODE GOES HERE</div>
</div>
```



6. Now add and modify a line for each chunk of conditional content you created earlier:
    a. Copy the line with **MERGE CODE GOES HERE** and paste as many below as needed (we needed three so we copied the first one and pasted two more).
    b. In the middle of each line you'll see **conditional-content-level-1** - on each line, change the number at the end to 2, 3 etc.
    c. Replace **MERGE CODE GOES HERE** with each of your snippet merge codes.
    The end result should look something like this:



7. Take note of which snippet you put at each conditional-content-level. You'll need it later.
8. Now select the **Custom CSS** tab.
9. Copy the code below and paste it anywhere in your Custom CSS:

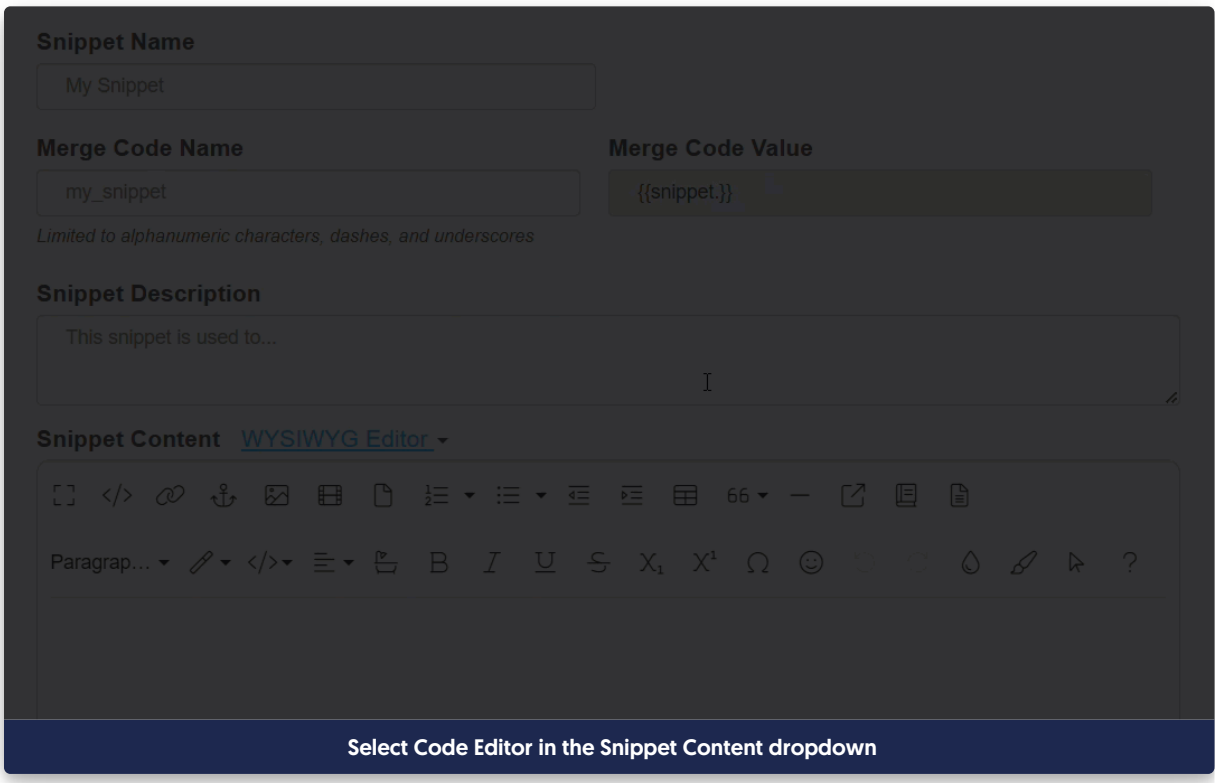
```
/* Tag-based conditional content */
.tag-conditional-content-container {
  opacity: 100;
  transition: all 0.5s;
}
.tag-conditional-content-container.invisible {
  opacity: 0;
}
.tag-conditional-content.invisible {
  display: none;
}
.article-tags {
  display: none;
}
```

10. Be sure to **Save** your changes once you're done.

Create your script

We have our content, our tags, and all the HTML and CSS framework we need. Now we just need a script to determine what to do with all of it.

1. Go to **Library > Snippets**.
2. Create a new snippet.
3. Give your snippet a **Name**, like Conditional Content Script.
4. Next to **Snippet Content**, select **Code Editor** from the dropdown.



Select Code Editor in the Snippet Content dropdown

5. Copy the code below and paste it into the Code Editor.

```
<script>
 $(function() {

  /** Modify the tag names below to match your conditional content. You can identify which is which by heading t

  var contentLevelDefs = [{
   'class': 'conditional-content-level-1',
   'tagName': 'Basic Plan'
  },{
   'class': 'conditional-content-level-2',
   'tagName': 'Pro Plan'
  },{
   'class': 'conditional-content-level-3',
   'tagName': 'Extreme Plan'
  }];

  /**** Leave everything below here as is ****/
  var def; // Prepare an empty variable to store the tag definition we need
  var tags = $('.article-tags').text().split(','); // Convert the tag names into an array
  // For each tag in the array we just created, find the tag name that matches one of our definitions.
  // NB If there are multiple tag names that match definitions, the last one to be matched will be used
  tags.forEach(function(tag) {
   var matches = contentLevelDefs.filter(function(o) { return o['tagName'] === tag });
 if (matches.length > 0) {
  def = matches[0];
 }
  });
  // If we matched a definition...
  if (def) {
   // Remove the invisible class from the matched element
   $('.'+def.class).removeClass('invisible');
   // And display the entire container
   $('.tag-conditional-content-container').removeClass('invisible');
  } else {
   // If we didn't find a match, send an error to the console to help diagnose why this may have happened
   console.log("No conditional content tag definition found for this article's tags");
   console.log('Article tags:', tags);
   console.log('Content level definitions:', contentLevelDefs);
  }

 });
</script>
```

6. **Modify the "contentLevelDefs" Defs stands for definitions - these create a connection between the HTML and snippet merge codes we pasted in earlier with your tag names .**
   - **'class': this helps the script identify which line of HTML (and in turn, which snippet merge code) we are talking about. You shouldn't need to change this, but you can use it to identify each of the lines by looking at your HTML:**



- 'tagName': update this with the name of the tag that you want to associate with that line of HTML code - if the article has this tag, that line of code (and the snippet it contains) will be displayed. Be sure you've captured the tag name exactly as it appears in your tag library--spelling, capitalization, and so forth need to be an exact match.
- Be sure to keep the class and tagName in 'single quotation marks'.
- If you need to add another definition because you have more than three chances of conditional content, ensure formatting remains consistent. Each definition should be separated by a comma and it should look something like this:

```
{
 'class': 'class-name-from-your-html',
 'tagName': 'Tag Name'
}
```

7. **Save** your snippet.
8. Copy the snippet's merge code.
9. Go to **Settings > Style**.
10. Below the preview pane, be sure **Custom HTML** is selected.
11. In the Custom HTML dropdown, select **Article**.
12. Paste your snippet merge code in anywhere in the Article Custom HTML edit pane.
13. **Save** your changes.

You should now have your content display based on what tag is present on the article! If your article is showing the wrong content, or none at all, contact us and we'll take a look.

Style your table footer

Last Modified on 05/29/2024 5:28 pm EDT

By default, the table footer row will get a light grey background color, but no other style treatment.

If you'd like to globally style your table footer row differently--to change the background color or font color, for example--you can do so by adding some Custom CSS:

1. In the lefthand navigation, go to **Settings > Style**.
2. Below the Preview pane, be sure that **Custom CSS** is selected.
3. Copy the CSS below and paste it in to the Custom CSS pane (at the bottom is always a good choice if you aren't sure where to put it).

```
/* Adjust table footer */
body table tfoot td {
  background: #ececec;
}
```

4. To update the background color from the default grey, adjust the hex code in row 3.
5. You can also include styles here for font-style or color to change the font. For example, this code:

```
/* Adjust table footer */
body table tfoot td {
  background: #1d284f;
  font-style: italic;
  color: #ffffff;
}
```

Will produce a dark blue background with italicized white text:

Header 1	Header 2
row 1, cell 1	row 1, cell 2
row 2, cell 1	row 2, cell 2
Footer 1	*Footer 2*

6. Be sure to **Save** your changes.

We recommend viewing a table with a footer to verify that you got the look you were going for.

Icon panels styles

Last Modified on 05/29/2024 5:28 pm EDT

If you're using the icon panels subcategory display in your categories, you may want to style those icon panels differently.

We use the same styles for the Icon Panels subcategory display as we do for the homepage category panel icons. The CSS below by default will apply to both places, but if you'd like to only style the Icon Panels subcategory display, you can add the .hg-category-page class in to the start of most styles and target your CSS that way.

Category header/title

By default, the category header (the title that's displayed) will use the default weight for h3s in your knowledge base, which is usually a 700 weight (bold).

We override this in our knowledge base to be a "normal" font weight of 400 using this CSS, added to **Settings > Style > Custom CSS:**

```
.cat-icons-wrapper h3 {
  font-weight: 400;
}
```

Category description

If the option to display category descriptions is enabled, the description will be styled by two CSS elements: some CSS tied to .faq-description and the color comes from the non-button hyperlink colors set across your entire knowledge base. The text color will match other hyperlinks across your knowledge base and the font will be size 18px.

Here's the default CSS for the .faq-description:

```
.faq-description {
    max-height: 125px; /* sets maximum height for the description */
    overflow: hidden; /* what happens if the descript is taller than that height */
    line-height: 1.2; /* Line height for description */
}
```

The above CSS will impact category descriptions everywhere they appear. If you want to limit it only to category descriptions within the icon panels, we suggest adjusting the class from `.faq-description` to `.cat-icon-panel .faq-description`

If you want to change the color or font size of the category description, we suggest adding custom CSS using that combo of classes, so you're not overriding hyperlink colors across your entire knowledge base. So for example, this code would adjust the font-size and color of the description:

```
.cat-icon-panel .faq-description {
    color: #808080; /* color of the category description text */
    font-size: 14px; /* font size of the category description text */
}
```

Overall panel default styles

The default styles we use for the icon panels are listed below.

You can copy this block of CSS and keep just the pieces you need to update.

```
/* Base style for panels themselves, including border, shadow, curved corners */
.cat-icon-panel {
    border: 1px solid #e6e6e6;
    display: flex;
    align-items: center;
    justify-content: center;
    flex-direction: column;
    box-shadow: none;
    padding: 16px;
    border-radius: 5px;
    cursor: pointer;
    transition: all .2s ease-in-out;
    backface-visibility: hidden;
}

/* Category icon height and transition on hover */
.category-icon {
    height: 100px;
    transition: all .2s ease-in-out;
}

/* Font size and color for category name */
.hg-minimalist-theme .cat-icon-panel .category-header,
.cat-icon-panel .category-header {
    font-size: 18px;
    color: #1d284f;
}

/* Alignment of category name */
.cat-icon-panel .category-header {
    text-align: center;
}

/* On hover behavior for the whole panel to make slightly bigger and add shadow */
.cat-icon-panel:hover {
    transform: scale(1.01) translateZ(0);
    box-shadow: 2px 4px 4px #aeaeae;
}

/* On hover behavior to make the icon bigger */
.cat-icon-panel:hover .category-icon {
    transform: scale(1.10);
}
```

Topic display: Hide category description

Last Modified on 05/29/2024 5:28 pm EDT

Category descriptions are displayed in certain areas (such as Title and Description layout in Default category). But if you're using a topic display category, the description is also displayed as the first text when you're viewing the category itself.

If you're also using the Intro Article setting, this means that the category description will display first, followed by the intro article's text.

While you can write the description so that it flows with the intro article, this can also create some redundant information. We've found it's often easier to just hide the category description, since the intro article is more descriptive.

To hide the category description:

1. Open the category for editing.
2. In the **Display Options** section, check the box next to **Hide description**.
3. Be sure to **Save** your changes.

Topic display: Style your tabs

Last Modified on 08/21/2024 2:45 pm EDT

By default, the Tabs layout option will use a thin grey border around the active tab and under the inactive tabs.

The color of the inactive tabs depends on which theme you're using. They all use the default color for hyperlinks across your knowledge base, but that color is different depending on your theme:

- Minimalist theme: Will use a color based on your Highlights & Accents color set in Settings > Style
- Classic, Clayton, and Modern themes: Will use a default blue hyperlink color

To update any of the styles for your tabs:

1. Go to **Settings > Style**.
2. In the **Customize HTML, CSS, and JS** section, be sure **Custom CSS** is selected.
3. Copy the appropriate CSS below.
4. Paste it into your Custom CSS pane.
5. Adjust the colors or other details to your liking.
6. Be sure to **Save** your changes once you're done!

Use the CSS below for step 3. And if you want to change an element of the styles that you don't see listed below, drop a comment on this article with what you're looking for so we can help you and update the documentation to include it!

Active tabs

Use this CSS to change the color of the active/selected tab:

```
/* Change color of active tab */
.nav-tabs>li.ko-topic-display-tab.active a {
  background-color: #fff; /* tab background color */
  color: #555; /* tab label color */
  border: 1px solid #ddd /* change border/outline */
}
```

Inactive tabs

Use this CSS to change the color of the inactive tabs and the font color they use:

```
/* Change color of inactive tabs */
.nav-tabs>li.ko-topic-display-tab:not(.active) a {
  background-color: #ddd; /* tab background color, default is none */
  color: #ddd; /* tab label color */
  border: 1px solid #ddd; /* border around top of tabs, default is transparent */
}
```

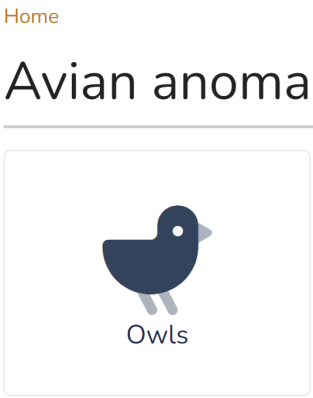
Use this CSS to change the border that displays beneath the inactive tabs:

```
/* Change inactive tabs border color/thickness */
.nav-tabs {
  border-bottom: 1px solid #ddd;
}
```

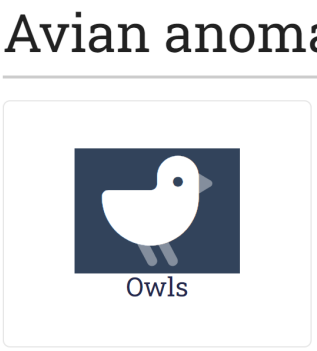
Icon panels: Change panel background color/category title color

Last Modified on 08/21/2024 2:06 pm EDT

By default, the Icon panels subcategory display will create white tiles with a colored icon, like this:

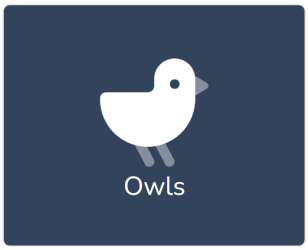


When you use the category icon background color, it will add a small square of color behind the icon only:



If you'd prefer to set the entire icon panel to use a colored background with a white icon, you can combine the icon color and background color with some Custom CSS:

Avian anomalies



You can choose to apply this Custom CSS to:

- All icon panels across your entire knowledge base (including your homepage)
- The icon panels on your homepage only (ignore categories)
- The icon panels in categories only (ignore the homepage)

See below for more details on each of these approaches. In all cases, you'll want to know the color you want to set the tiles to (this can be a hex code or RGB value) and the color you'd like to set the text to (we use white in our examples).

All icon panels, including homepage

You can choose to use the same color treatment across your entire knowledge base, anywhere icon panels are used. This will apply to icon panels on the homepage as well as any category landing pages where you're using the icon panels subcategory display option.

To set your knowledge base up to use the same treatment everywhere:

1. Go to **Settings > Style**.
2. In the **Customize HTML, CSS, and JS** section, be sure **Custom CSS** is selected.
3. Copy the CSS below and paste it into the Custom CSS editor. If you already have Custom CSS, we recommend adding it to the bottom.

```
/* Set icon panels to use colored background instead of default white */
.cat-icon-panel {
  background-color: #26435c; /* change color here */
}

/* Change color of text for category label in panels from default to white */
.hg-minimalist-theme .cat-icon-panel .category-header,
.cat-icon-panel .category-header {
  color: #ffffff; /* change color here */
}
```

4. Update the background-color in row 3 to be the color you'd like used for the tiles themselves, to override the default white. Our sample uses a dark blue.
5. Update the color in row 9 to adjust the color used for the category titles. Our sample uses white.
6. You can **Update Preview** your to see your homepage update in the Preview pane above.

7. Be sure to **Save** your changes.

> **Category icons unaffected**
> This CSS will **NOT** impact the color of category icons. We recommend reviewing all categories with icons to be sure the colors still look good. White icons will only preview well in the category editor if you've explicitly set a category icon background color!

Homepage icon panels only

To apply style changes to your homepage icon panels only:

1. Go to **Settings > Style**.
2. In the **Customize HTML, CSS, and JS** section, be sure **Custom CSS** is selected.
3. Copy the CSS below and paste it into the Custom CSS editor. If you already have Custom CSS, we recommend adding it to the bottom.

```
/* Set homepage icon panels to use colored background instead of default white */
.hg-home-page .cat-icon-panel {
  background-color: #26435c; /* change color here */
}

/* Change color of text for category label in homepage panels from default to white */
.hg-minimalist-theme.hg-home-page .cat-icon-panel .category-header,
.hg-home-page .cat-icon-panel .category-header {
  color: #ffffff; /* change color here */
}
```

4. Update the background-color in row 3 to be the color you'd like used for the tiles themselves, to override the default white. Our sample uses a dark blue.
5. Update the color in row 9 to adjust the color used for the category titles. Our sample uses white.
6. You can **Update Preview** your to see your homepage update in the Preview pane above.
7. Be sure to **Save** your changes.

> This CSS will **NOT** impact the color of your top-level category icons! We recommend reviewing those categories to be sure the colors still look good. White icons will only preview well in the category editor if you've explicitly set a category icon background color!

All subcategory panels only (no homepage)

To apply style changes to all categories but NOT your homepage:

1. Go to **Settings > Style**.
2. In the **Customize HTML, CSS, and JS** section, be sure **Custom CSS** is selected.
3. Copy the CSS below and paste it into the Custom CSS editor. If you already have Custom CSS, we recommend adding it to the bottom.

```
/* Set homepage icon panels to use colored background instead of default white */
.hg-category-page .cat-icon-panel {
  background-color: #26435c; /* change color here */
}

/* Change color of text for category label in homepage panels from default to white */
.hg-minimalist-theme.hg-category-page .cat-icon-panel .category-header,
.hg-category-page .cat-icon-panel .category-header {
  color: #ffffff; /* change color here */
}
```

4. Update the background-color in row 3 to be the color you'd like used for the tiles themselves, to override the default white. Our sample uses a dark blue.
5. Update the color in row 9 to adjust the color used for the category titles. Our sample uses white.
6. Be sure to **Save** your changes.



Subcategory icons unaffected
This CSS will **NOT** impact the color of your subcategory icons! We recommend reviewing those categories with icons to be sure the colors still look good. White icons will only preview well in the category editor if you've explicitly set a category icon background color!

Topic display: Change Quick Links style and/or add header

Last Modified on 11/29/2024 1:19 pm EST

In a topic display category, the Quick Links section looks like this by default:

- What features are available during my trial?
- What are my pricing and plan options?
- How do I add more users to my trial?
- How do I add more knowledge bases to my trial?
- How do I extend my trial?
- What happens when my trial expires?
- What happens when I subscribe to KnowledgeOwl?

Here in our Support KB, we add a "Table of Contents" header with a border, change the icon displayed, and the colors. So ours looks like this:

Table of contents

- How do I add more authors to my trial?
- How do I add more knowledge bases to my trial?
- How do I extend my trial?
- What happens when my trial expires?
- What are my pricing and plan options?
- How do I update my trial to the Business or Enterprise plan?
- What happens when I subscribe to KnowledgeOwl?
- How do I cancel my trial?

Interested in making a similar set of changes? Below, we walk through the various elements on how we did it.

Change the bullet points to an icon

To change the bullet points to the right-pointing caret, we add some Custom CSS and remove some existing Custom CSS (if it exists!). This uses our existing integration with Font Awesome.

1. **Go to Settings > Style.**
2. **Below the preview pane, be sure Custom CSS is selected.**
3. **Copy the CSS below and paste it in to the CSS pane. If your knowledge base already has a lot of CSS in it, see if you have a section for Topic Category styles and add it there.**

```
/* In topic display categories, add > before the toc items */
.topic-toc-item::before {
  font-family: 'FontAwesome';
  content: "\f105" !important;
  color: #F8B88B;
  font-size: 12px;
}
```

4. The code above sets the icon to be our brand-specific light orange color. To use a different color, adjust the hex code listed in row 5 of the code from #F8B88B to the color of your choice.

5. The code above sets the icon displayed to be a >. You can update this to use nearly any FontAwesome icon you'd like. To adjust the icon, replace the \f105 with the content value for another FontAwesome icon:

   a. You can see the content value if you open an icon in FontAwesome. Near the top, they'll list a Unicode value (they often begin with f). You can copy that Unicode value and replace the content value in row 4. Be sure to keep the slash and the quotes, so your value should still have "\fxxx" in the format.

   b. For example, if we wanted to use the circle plus icon:

   We would use this code in row 4: `content: "\f055" !important;`

6. *Optional:* You may need to play with the pixel size (px) of the font-size listed, as we picked one that looked good for our default font sizes and family.

7. If your knowledge base already has a lot CSS in it, you may also need to *remove* some default CSS we add. If your CSS had the Topic Category styles section, you'll want to remove the third set of styles defined in that section:

```
/* change quick links styles */
.hg-minimalist-theme  .topic-toc-item {
  margin-bottom: 10px;
  display: list-item;
  line-height: 1.2;
}
```

8. Delete that code completely.

9. Be sure to **Save** your changes! (And if something goes awry, you can also Style Settings rollback to previous save to undo it!)

Change the background color and borders

We've also tweaked the background color and the borders slightly in our example. You certainly don't have to do that, but here's the Custom CSS we added to **Settings > Style** to achieve that look:

```
/* Change background color and borders */
.topics-toc-cntr {
  background: #FAFBFC;
  border: 1px solid #E6E6E6;
  border-radius: 5px;
}
```

You can add this CSS into the same section as you added the icon-adjusting CSS above.

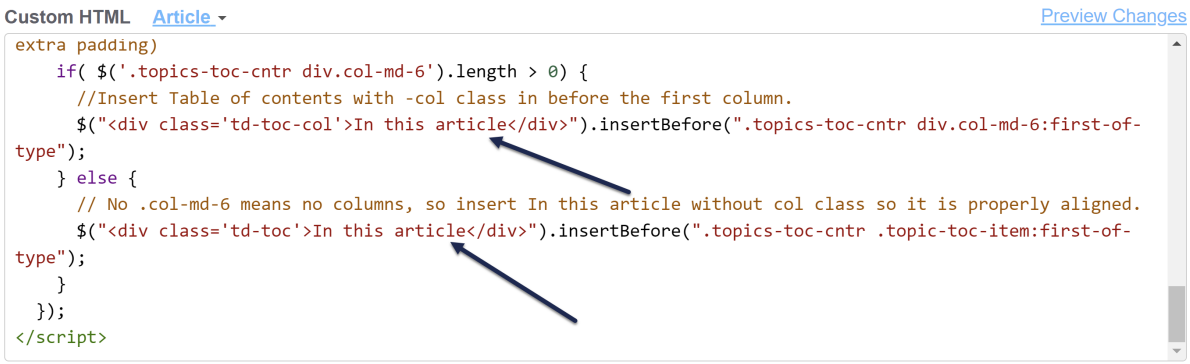
Add the Table of Contents header

For this part, we run a script in the Article Custom HTML to create a div to house the table of contents header and insert it. First, we add a script to the Custom HTML to handle the div itself; then, we add some Custom CSS to style that div.

1. **Go to Settings > Style.**
2. **Below the preview pane, be sure Custom HTML is selected.**
3. **Select Article from the Custom HTML dropdown.**
4. **Copy the code below and paste it in to the bottom of the HTML pane.**

```
<script>
 //This script will add a "Table of contents" title into the Quick Links of a topic display category, formatted appro
priately.
 $(function() {
  //check if the .topics-toc-cntr exists and has col-md-6 divs in it (means it spans two columns and has extra pa
dding)
  if( $('.topics-toc-cntr div.col-md-6').length > 0) {
   //Insert Table of contents with -col class in before the first column.
   $("<div class='td-toc-col'>Table of contents</div>").insertBefore(".topics-toc-cntr div.col-md-6:first-of-type"
);
  } else {
   // No .col-md-6 means no columns, so insert Table of contents without col class so it is properly aligned.
   $("<div class='td-toc'>Table of contents</div>").insertBefore(".topics-toc-cntr .topic-toc-item:first-of-type");
  }
 });
</script>
```

5. **If you'd like to use a header other than Table of Contents, replace Table of contents in rows 7 and 10 with the text you'd like to use. Here, we've replaced it with In this article:**



6. **Be sure to Save your changes.**

Once you've added that header, you'll need to style it, too. We add some Custom CSS to Settings > Style, in the Topic Category styles section (if it exists):

1. Still in **Settings > Style**, select **Custom CSS** below the preview pane, instead of Custom HTML.
2. Copy the CSS below and paste it in to the CSS pane. If your knowledge base already has a lot of CSS in it, see if you have a section for Topic Category styles and add it there:

```
/* Script in Custom HTML > Article adds Table of contents div with .td-toc and .td-toc-col classes, style that */
.td-toc,
.td-toc-col {
  border-bottom: 1px #E6E6E6 solid; /* Add a border underneath the header */
  font-weight: bold; /* Set to bold, otherwise default font weight is used */
  color: #1D284F; /* Override default color */
  padding-bottom: 10px; /* Add some space below the header/above the border */
  margin-bottom: 10px; /* Add equal amount of space below the border/above the article list */
}

/* Extra padding to the ToC div when there are multiple columns so the header indents to match the content */
.td-toc-col {
  padding-left: 15px;
}
```

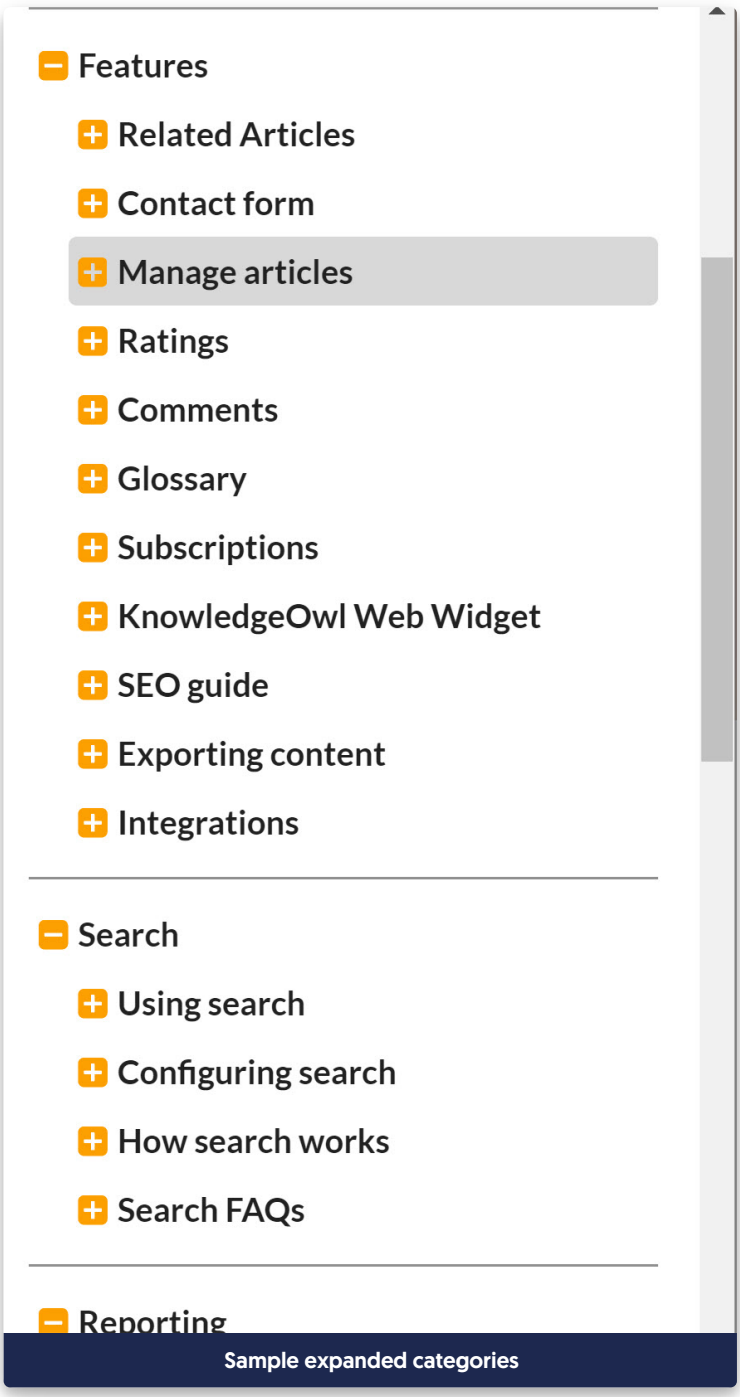
3. Be sure to **Save** your changes. (And if something goes awry, you can also Style Settings rollback to previous save to undo it!)

You should be able to play around with some of these settings to get the look and feel you're going for. For example, if you don't want a border between the header and the body content, you can remove lines 4, 7, and 8 from the CSS sample. If you don't want to bold the header, you can remove row 5.

Display categories open by default

Last Modified on 05/29/2024 5:28 pm EDT

Depending on your audience and the size of your knowledge base, you may want to open your categories in the table of contents by default.

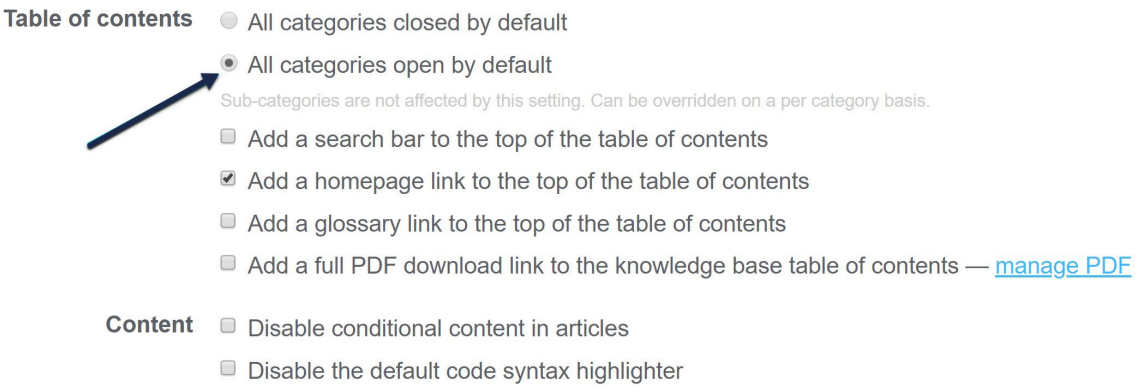


Sample expanded categories

To set this up:

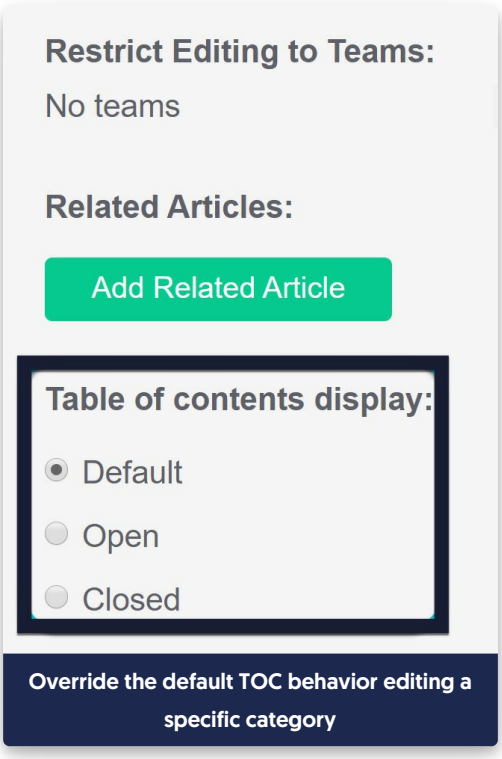
1. Go to **Settings > Basic.**

2. **In the Table of contents section, check the option to that says "All categories open by default".**



3. **Save and your categories will be open by default.**

Note: You can also set individual categories and sub-categories to show as open or closed by editing them and choosing the appropriate override in the Table of contents display section in the righthand column:



Override the default TOC behavior editing a specific category

See Website Settings for more information on other settings available in **Settings > Basic.**

Add Home link to table of contents

Last Modified on 07/10/2024 4:24 pm EDT

While your uploaded logo is automatically linked to your knowledge base homepage, you might want to add a button or a link for readers to easily navigate back.



To add a home button to the top of your table of contents:

1. Go to **Settings > Basic.**
2. In the **Website Settings** section, look for the **Table of contents** header.
3. Check the box next to **Add a homepage link to the top of the table of contents.**
4. **Save.** You should now see the Home link in your TOC.

See Website Settings for more information on other settings available in **Settings > Basic.**

Add search bar to table of contents

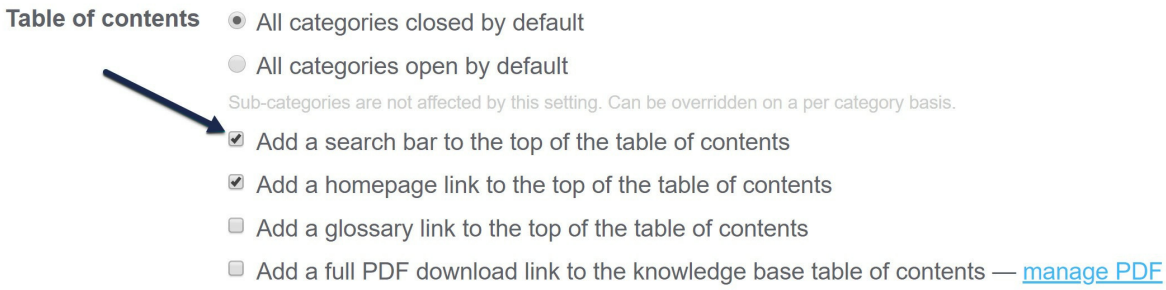
Last Modified on 05/29/2024 5:27 pm EDT

Though most themes include a search bar in the top navigation, you might want to include a search bar in your table of contents, as well.



To add a search bar to the top of your table of contents:

1. **Go to Settings > Basic.**
2. **In the Table of contents section, check the box next to "Add a search bar to the top of the table of contents".**



3. **Save. You should now see the search bar at the top of your TOC.**

See Website Settings for more information on other settings available in Settings > Basic.

Add glossary link to table of contents

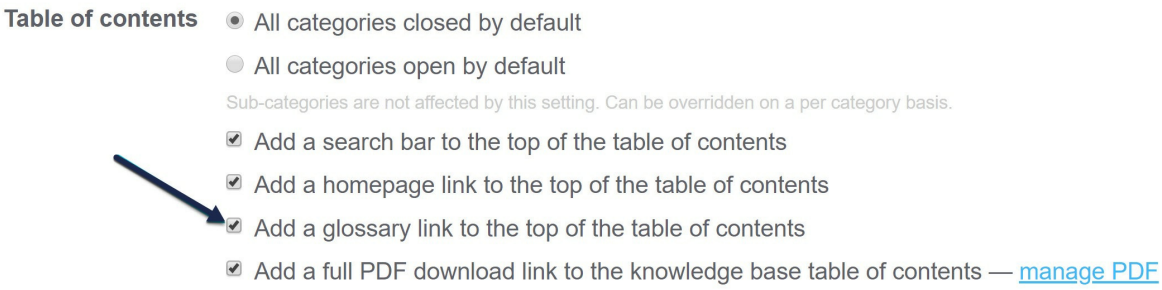
Last Modified on 05/29/2024 5:27 pm EDT

If you're using the Glossary, you can add a link to the glossary to your table of contents.



To add a glossary link to the top of your table of contents:

1. Go to **Settings > Basic.** (Or, from the **Glossary** page, click the **Edit in settings** link next to "Link in the table of contents.")
2. In the **Table of contents** section, check the box next to "Add a glossary link to the top of the table of contents".



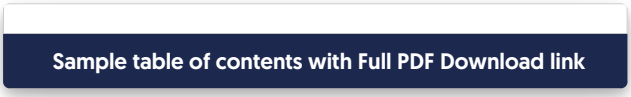
3. **Save.** You should now see the glossary at the top of your TOC.

See Website Settings for more information on other settings available in **Settings > Basic.**

Add a link to the full PDF download to table of contents

Last Modified on 12/05/2024 1:55 pm EST

If you're using a Standard PDF export (Full PDF Download) of your knowledge base, you can add a download link for the PDF to your table of contents.



There are two different ways you can add a link to the full PDF download to the bottom of your table of contents; one is through the **Standard PDF** configuration; the other is through **Settings > Basic**. Below, we describe how to add it through the Standard PDF configuration; refer to Website Settings for adding it from **Settings > Basic**.

1. In the left navigation, go to **Exports**.
2. In the **Standard PDF** tab, check the **Display to readers** box to **Add a full PDF download link to the knowledge base table of contents**.



3. **Save** and regenerate the PDF. You should now see the PDF link at the bottom of your TOC.
4. By default, the table of contents link is "Full PDF Download". If you'd like to change that wording, use the Table of Contents section of the Customize Text tool to update it!

Refer to Website Settings for more information on other settings available in **Settings > Basic**.

Manual updates required
This PDF will **not** automatically update as you update content. You must manually regenerate the PDF!

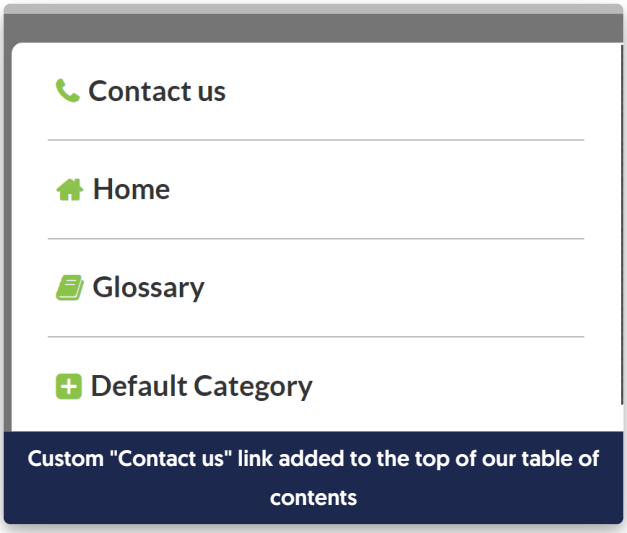
Add contact us link to table of contents

Last Modified on 05/29/2024 5:27 pm EDT

If you'd like to add links to your table of contents, you can do so in two ways:

- To add a link in with your categories, create a URL redirect category with the link of your choice.
- To add a link to the very top or bottom of your table of contents, see the instructions below.

If you're using the contact form, you might want to add a link to the contact form in your table of contents, so let's use that as an example:



Custom "Contact us" link added to the top of our table of contents

Prep work

Before you begin, you'll need a few things:

- The link you'd like to add to your table of contents.
- A free FontAwesome icon you'd like to use for that link. We already have a few icons used, like home, or the book used next to glossary. You'll need to know the FontAwesome class for the icon.
- Where you'd like the link placed. The scripts we provide below will put it:
  - At the top of the table of contents, above all other links (including Home, if it's enabled)
  - Below the Home link but above everything else in the table of contents, if Home link is enabled
  - At the very bottom of the table of contents

Setup

1. Go to **Settings** > **Style**.
2. Below the Preview Pane, be sure **Custom HTML** is selected.
3. In the Custom HTML dropdown, be sure **Body** is selected.

4. **Choose your script:**

    a. **If you'd like to add this link to very top of your table of contents, even above the Home link (if it's enabled) copy this script and paste it into the editor:**

```
<script>
 //Add Contact Support link to top of table of contents, before Home link
 $(function(){
   $(".documentation-outter-list").prepend('<li data-type="category" class="category-container nav-header
 });
</script>
```

    b. **If you have the Home link enabled and you'd like this new link to appear right below the Home link, copy this script and paste it into the editor:**

```
<script>
 //Add Contact Support link to top of table of contents, after Home link
 $(function(){
   $(".documentation-outter-list li:eq(1)").before('<li data-type="category" class="category-container nav-h
 });
</script>
```

    c. **If you'd like your new link to appear at the bottom of your table of contents after your final category, copy this script and paste it into the editor:**

```
<script>
 //Add Contact Support link to bottom of table of contents
 $(function(){
   $(".documentation-outter-list").append('<li data-type="category" class="category-container nav-header
 });
</script>
```

5. **If you'd like to send this to your contact form, regardless of which script you chose above, if your knowledge base uses /docs or /home in the URL instead of /help, update the** `href="https://support.knowledgeowl.com/help/contact-us"` **to be the appropriate URL (such as "/docs/contact-us" or "/home/contact-us").**

6. **To use a link that's not the Contact Form, replace the URL in** `href="https://support.knowledgeowl.com/help/contact-us"` **with the URL you'd like to use. This can be a link to something else in your knowledge base (such as** `href="https://support.knowledgeowl.com/help/add-a-category"` **) or to something outside of your knowledge base (like** `href="https://www.knowledgeowl.com/terms-and-conditions"` **)**

7. **We used the text label "Contact Support" for our example. To display a different text label, replace Contact Support with the text of your choice.**

8. **To use a different FontAwesome icon, replace the** `fa-life-ring` **in your script with the FontAwesome class for that icon.**

9. You can Preview Changes to see how your code looks.
10. Be sure to **Save** your changes once you're done.

For example, here, we've chosen the 4a script, which will place our new link at the very top of the table of contents, above Home. We've adjusted the icon to use the phone icon ("fa-phone") and the text to read "Contact us". Here's how the script looks:

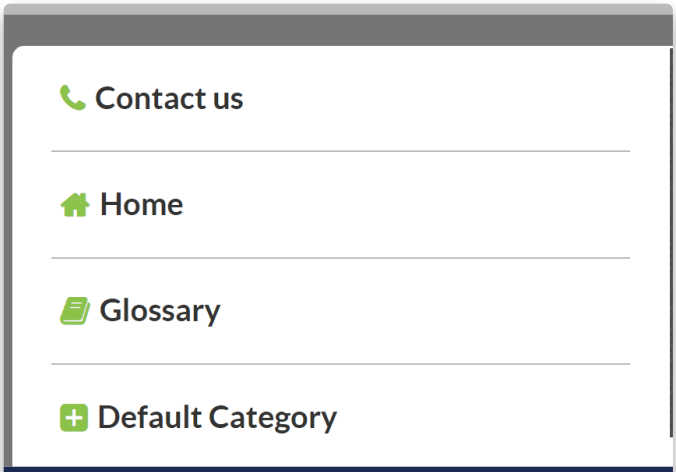
Custom CSS | Custom HTML | Custom <head>

Custom HTML Body Preview Chang

```
lite-ring"></i></a><a class="documentation-category" href="/help/contact-us">Contact Support</a></div></li>');
  });
</script>
```

```
<script>
  //Add Contact us link to top of table of contents, above Home link
  $(function(){
    $(".documentation-outter-list").prepend('<li data-type="category" class="category-container nav-header nav-header-sub level-0"><div class="category-link-container "><a href="/help/contact-us"><i class="home-icon fa fa-phone"></i></a><a class="documentation-category" href="/help/contact-us">Contact us</a></div></li>');
  });
</script>
```

And here's how it displays in our table of contents:



Sample output from that script. Note that the link appears above Home since we chose script 3a.

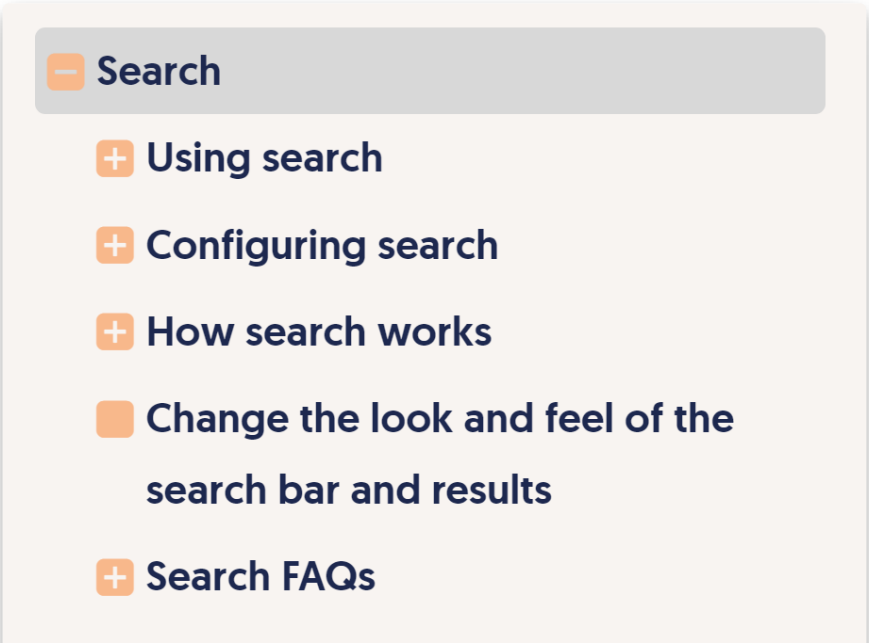
Change the icons used in the table of contents

Last Modified on 11/29/2024 1:19 pm EST

The default table of contents icons use right-pointing and down-pointing arrows to indicate category navigation.

If you take a look in our table of contents in this knowledge base, you'll see different icons:

- A plus + icon when a category can be expanded to view content
- A minus - icon to collapse a category
- And a solid square when a category contains no content



Sample of our table of contents icons

If you'd like to use a similar treatment in your own table of contents, here's how we did it.

The steps below should work in any of our default knowledge base themes.

Setup to change right/down chevrons to plus/minus icons:

To change the right and down chevrons/arrows to plus and minus icons:

1. Go to **Settings > Style**.
2. Below the Preview Pane, be sure **Custom CSS** is selected.
3. Copy the code below and paste it into your Custom CSS editor (at the bottom is fine). This code will replace the right-chevron with the plus-square and the down-chevron with the minus-square:

```
/* Adjust TOC icons, part one: */
/* Change TOC chevron-right to plus-square */
.documentation-categories .fa-chevron-right:before {
   content: "\f0fe" !important;
}
/* Change TOC chevron-down to minus-square */
.documentation-categories .fa-chevron-down:before {
   content: "\f146" !important;
}
```

4. You can Preview Changes to see the effect.

5. Be sure to **Save** your changes once you're done.

Tweaks

The code above uses free FontAwesome icons. You can update the code to use different icons.

To do so:

- In Step 3, replace the `content` values we used in rows 4 and 8 with the content values for other FontAwesome icons.
- You can see the content value if you open an icon in FontAwesome. Near the top, they'll list a Unicode value (they often begin with f). You can copy that Unicode value and replace the content values in rows 4 and 8. Be sure to keep the slash and the quotes, so your value should still have "\fxxx" in the format.
- For example, if we wanted to use the circle plus icon instead of the square plus:

  We would use this code in row 4: `content: "\f055" !important;`

Setup to change the "empty" category icon

To change the icon for "empty" categories so it's not the right-chevron:

1. Go to **Settings > Style**.

2. Below the Preview Pane, be sure **Custom HTML** is selected.

3. In the Custom HTML dropdown, be sure **Body** is selected.

4. Copy the code below and paste it into the bottom of your Body Custom HTML editor. This code will check to see if the category is empty; if it is empty, it will remove the chevron-right and add the plain square icon.

```
<script>
$(function(){
 //Adjust TOC icons, part 2: For Table of Contents items with no content, change chevron-right to plain square
     $('.nav-header-sub').each(function() {
       if($(this).find('ul').find('li').length < 1)  {
       $(this).find('i:not(".fa-home,.fa-envelope-o,.fa-book")').removeClass("fa-chevron-right").addClass("fa-square
      };
    });
  });
</script>
```

5. You can Preview Changes to see your table of contents update.

6. Be sure to **Save** your changes once you're done.

Tweaks

The code above uses free FontAwesome icons. You can update the code to use an icon other than the plain square:

- In Step 6, replace the `fa-square` class being added at the end of row 6 with the class of the icon you'd like to use instead.
- To find the class of a FontAwesome icon, open the details for the icon and look at the HTML being used. For the `circle-plus` displayed above, the class is `fa-circle-plus`. So we could update row 6 of our script to be:

```
$(this).find('i:not(".fa-home,.fa-envelope-o,.fa-book")').removeClass("fa-chevron-right").addClass("fa-circle-plus");
```

Change the slideout Table of Contents' width (Minimalist Theme)

Last Modified on 05/29/2024 5:27 pm EDT

The Minimalist theme uses a slideout Table of Contents, which is set to 360px by default.

If you'd like to change the width of that Table of Contents:

1. Go to **Settings > Style**.
2. Below the preview pane, select **Custom HTML**.
3. In the Custom HTML dropdown, select **Body**.
4. Copy and paste the code below anywhere into your Body Custom HTML, changing the value="number" to be the pixel width you'd like to use (here, we use 450):

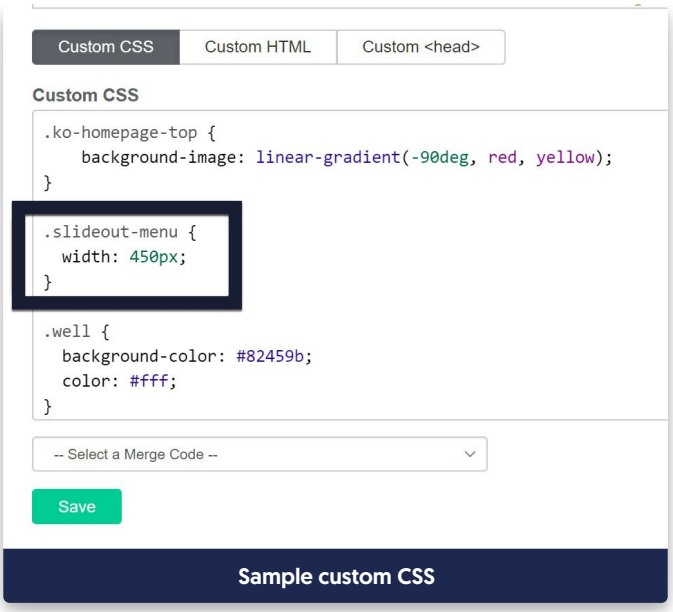
```
<input type="hidden" class="slideout-width" value="450">
```



Sample Body Custom HTML

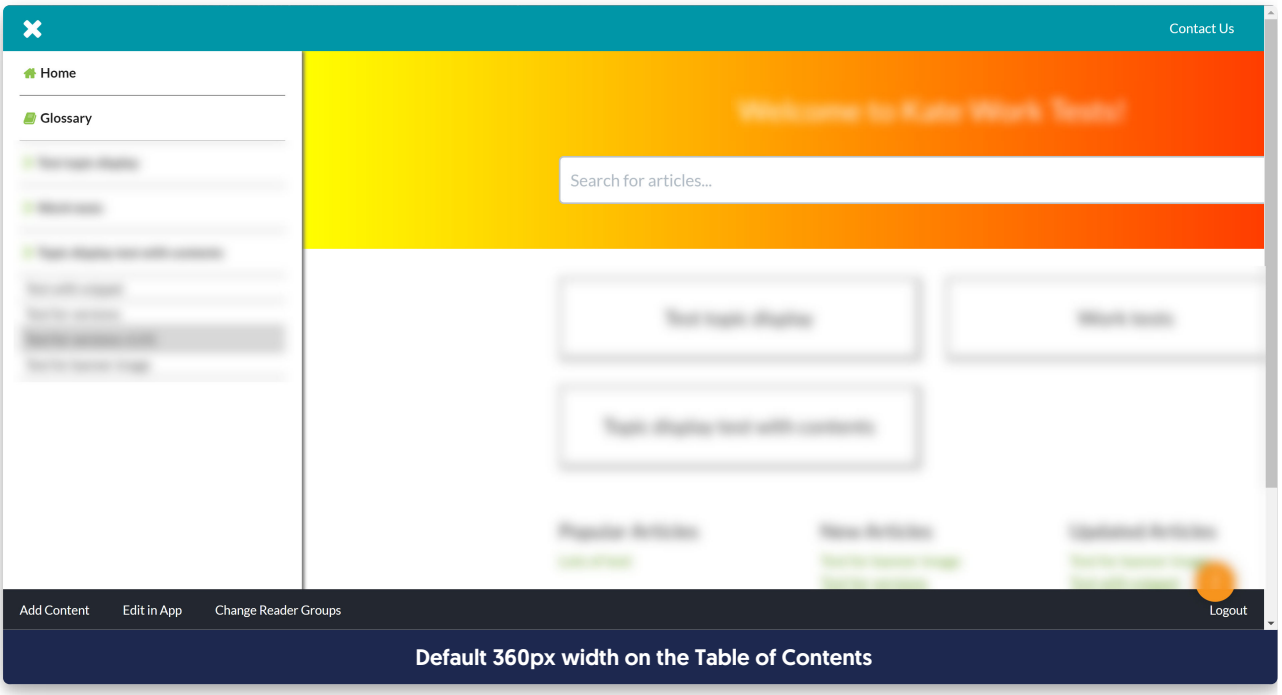
5. Now go to **Custom CSS**.
6. Copy and paste the code below into your Custom CSS, changing the width pixel number to match the width you used above (here, we're using 450 again):

```
.slideout-menu {
  width: 450px;
}
```

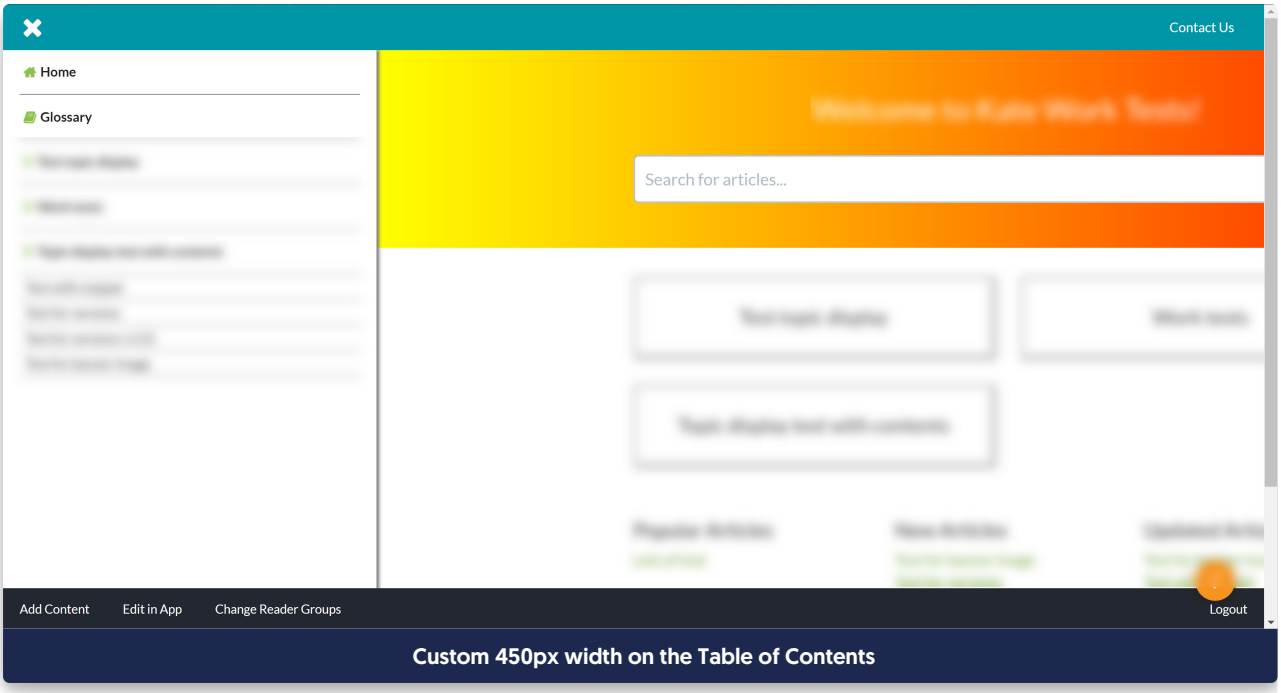


7. **Save.**

For comparison, here's what the knowledge base looked like before these changes, with the default 360px width:



And here's what it looked like after, with the custom 450px width:



Custom 450px width on the Table of Contents

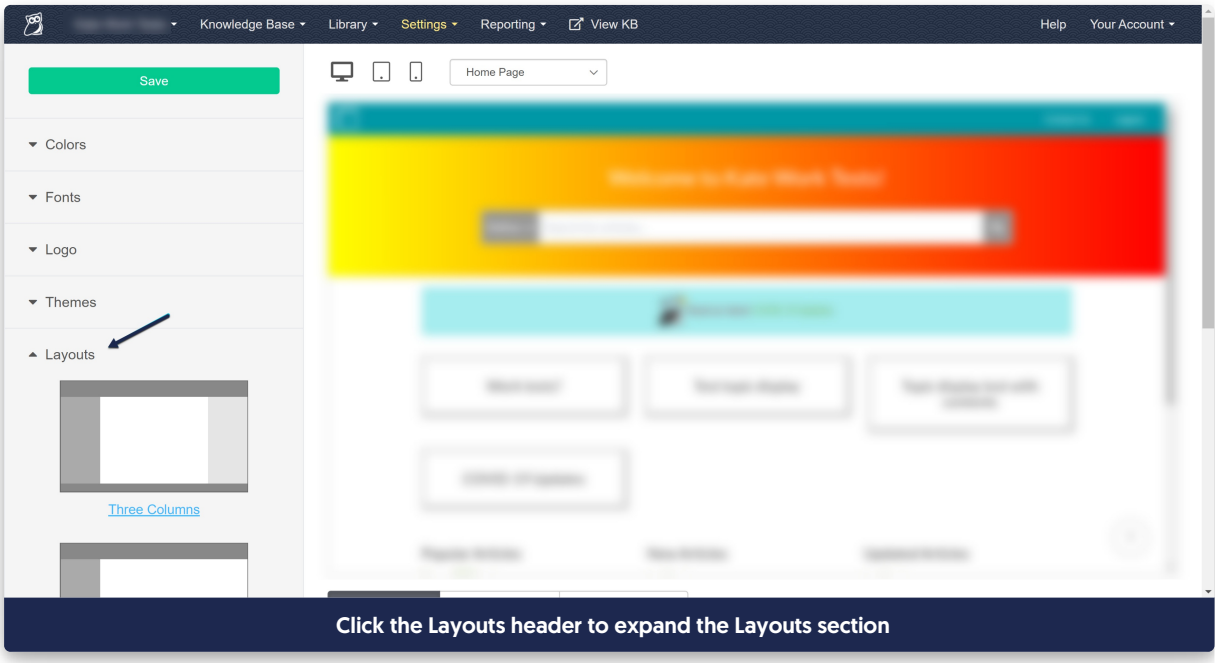
Hide the table of contents

Last Modified on 05/29/2024 5:28 pm EDT

You might want to hide the table of contents completely in your knowledge base--maybe to save some screen real estate, or to force people to work through navigation, or simply because your knowledge base isn't complex enough to need a table of contents everywhere.

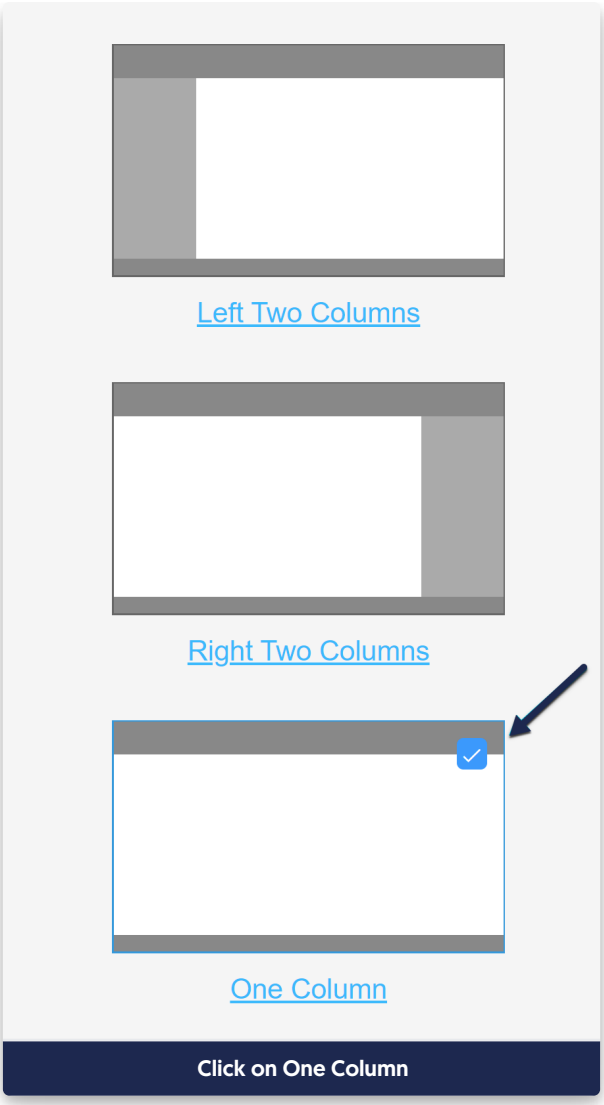
To do so, you'll need to use the Single Column layout:

1. Go to **Settings > Style**.
2. Expand the Layouts section.



Click the Layouts header to expand the Layouts section

3. Click on the One Column layout option.



4. The Preview pane should update. Click the **Save** button to save these changes.

Depending on the Theme you're using, you may see other changes in various pages. We recommend doing a quick review of a few pages to be sure the new layout looks good. If you find specific pages that seem to need adjustment, contact us for help making those changes.

Change your search bar placeholder

Last Modified on 05/29/2024 5:27 pm EDT

You can customize the text in your search bar placeholder using our Customize Text tool. To do so:

1. Go to **Tools > Customize Text**.
2. Select **Search** from the Knowledge Base Section dropdown.
3. Find the row for "Search for articles..." (generally the top row!).
4. Click the gear cog icon next to that row.
5. Add the new placeholder text you'd like to display.
6. Once you have the text as you'd like, be sure to select **Update Text String**.

The change will now be live in your knowledge base!

For more detailed instructions on working with the Customize Text tool, see Add or edit your own text string.

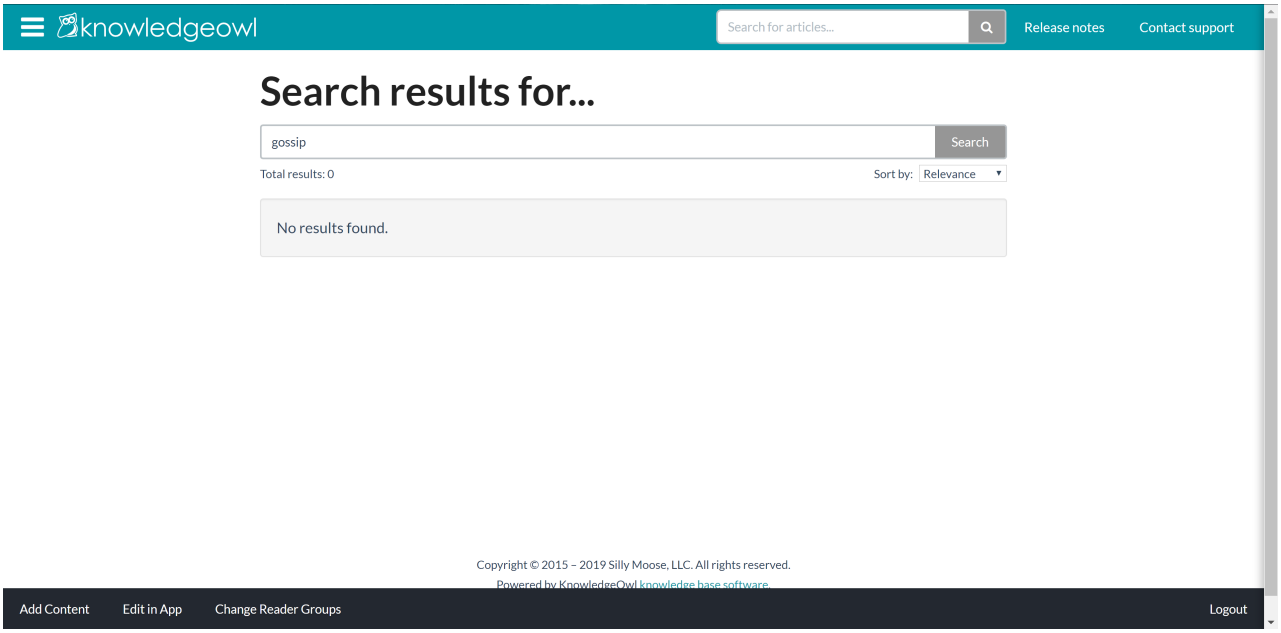
Other search-related text you can customize includes:

- The global search bar placeholder ("Search for articles...")
- The global search bar autocomplete call to action ("Hit enter to search")
- The Search results... page header
- All of the sort options on the search results page
- Most of the metadata on the search results page
- The No results found message
- If you're using the options to Filter search by categories, all of the text related to those.

Customize the search "No Results" message

Last Modified on 05/29/2024 5:28 pm EDT

By default, searches that return no results display the text, "No results found":



You can customize the text in that message using our Customize Text tool. To do so:

1. Go to **Tools > Customize Text**.
2. Select **Search** from the Knowledge Base Section dropdown.
3. Find the row for "No results found".
4. Click the gear cog icon next to that row.
5. Add the new text you'd like to display.
6. Once you have the text as you'd like, be sure to select **Update Text String**.

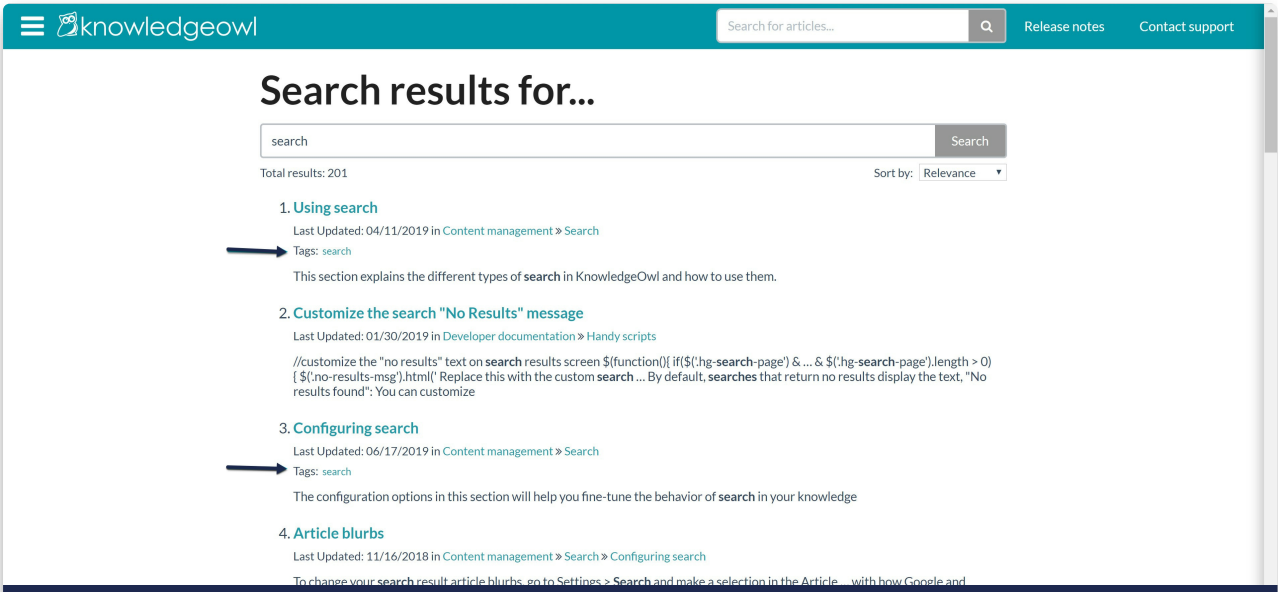
The change will now be live in your knowledge base!

For more detailed instructions on working with the Customize Text tool, see Add or edit your own text string.

Hide tags from Search Results

Last Modified on 05/29/2024 5:28 pm EDT

KnowledgeOwl search results will automatically display all tags assigned to a given article :



Sample of Tags showing in Search Results

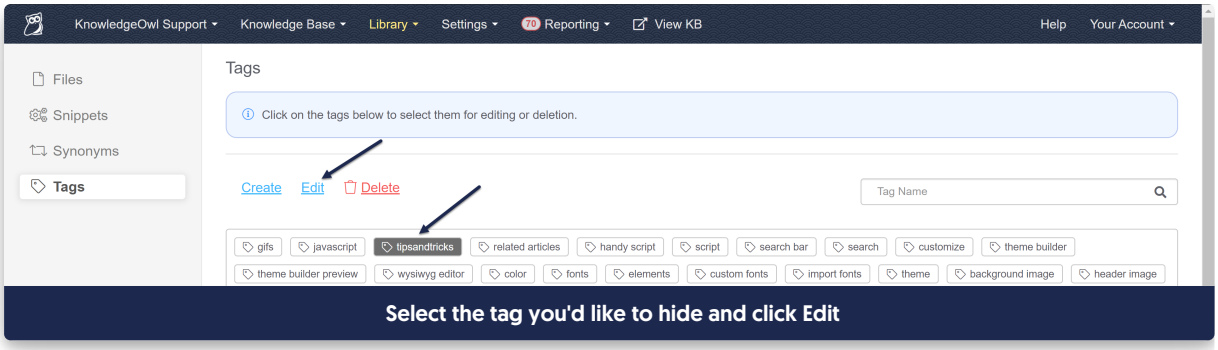
However, if you're using tags for custom filters in the Manage Articles interface, you might not want those internal tags to be shown in search results.

You can mark tags like this as hidden from readers. Hiding a tag from readers:

- **Keeps it visible in the article editor and category editor**
- **Allows it to be used as a filter in Manage Articles custom filters**
- **Prevents the tag from appearing in search results in your knowledge base**
- **Prevents the tag from appearing in the typeahead suggestions when a reader types ":" to begin a tag search**

To hide an existing tag from readers:

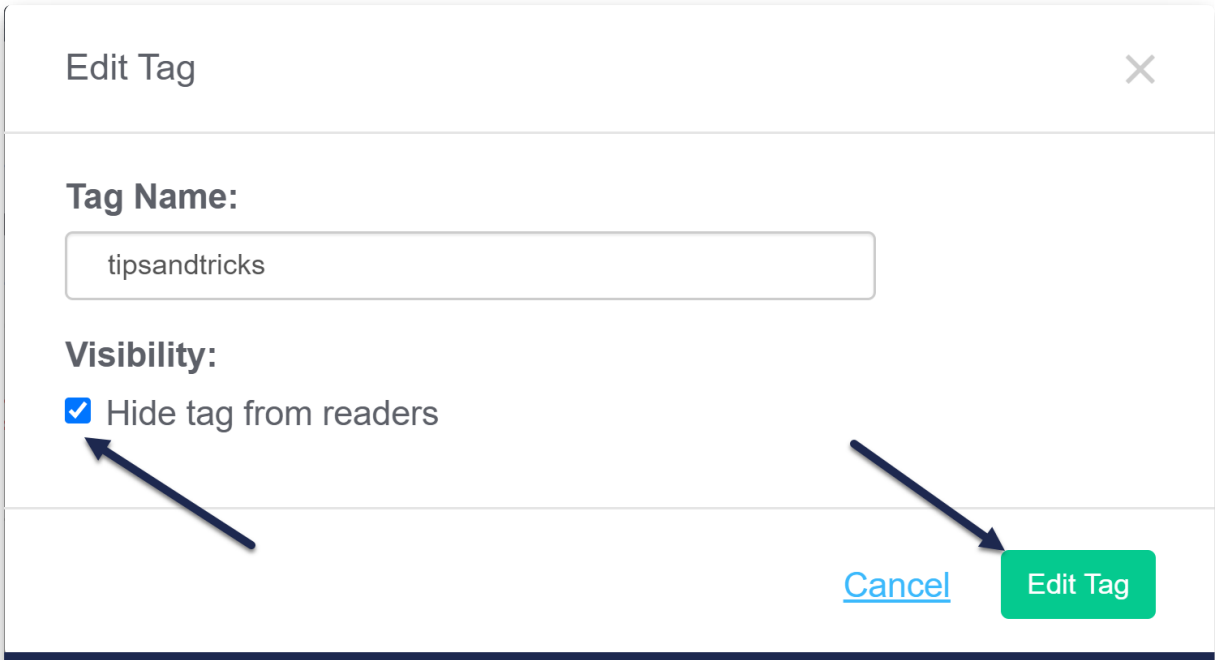
1. **Go to Library > Tags.**
2. **Click to select the tag you'd like to hide from readers.**
3. **Click on the Edit link.**



Select the tag you'd like to hide and click Edit

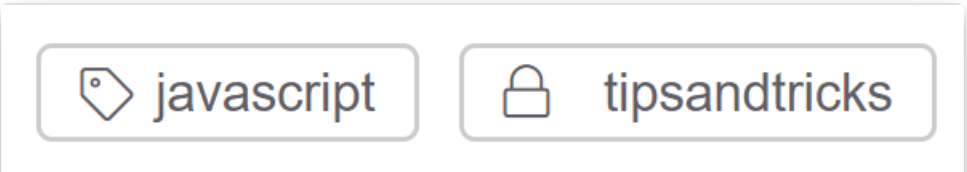
4. In the edit pop-up that appears, under **Visibility**, check the box next to "Hide tag from readers."

5. Click the **Edit Tag** button to finalize your changes.



Check the box to Hide tag from readers, then click Edit Tag to finalize your changes

6. Regular tags will have a normal tag icon in the Tags Library; tags hidden from readers will have a padlock icon. Here, "javascript" is a tag readers can see, and "tipsandtricks" is hidden from readers:

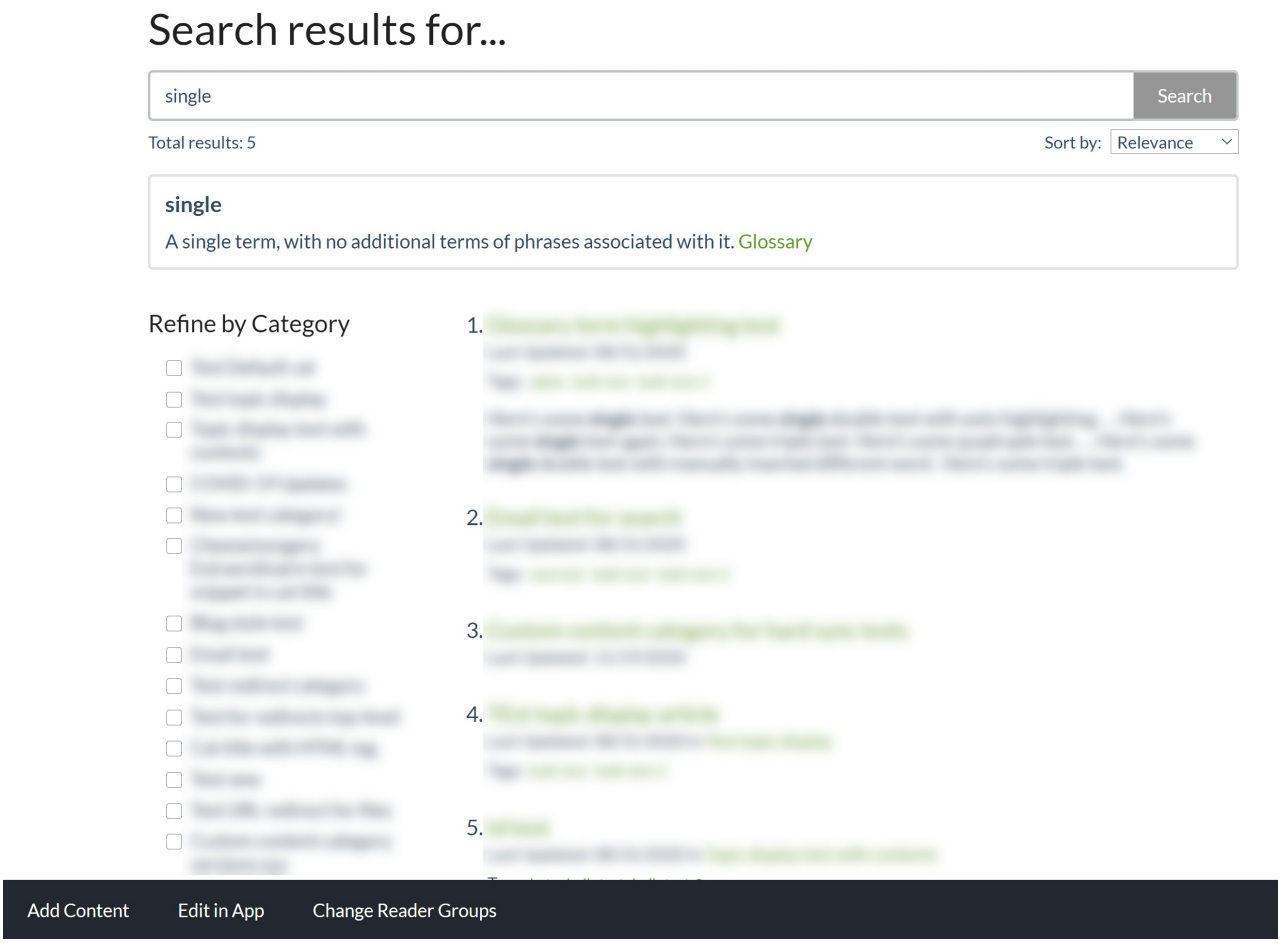


Sample tags; the tag on the left with the tag icon is viewable to readers; the tag on the right with the padlock is not

Style the glossary snippet search results

Last Modified on 05/29/2024 5:28 pm EDT

If you've enabled the option to display glossary snippets in your search results, you can style the snippets in a few ways.



Style the box

You can style the box the result displays in, to adjust the background color, border, border color, thickness, and so on.

The default styling for this box is:

```
.ko-glossary-search {
    border: 2px solid #e3e3e3;
    border-radius: 4px;
    margin: 15px 0;
    padding: 12px;
    position: relative;
}
```

This creates a box with a light grey border, with a white background and some padding between the text and the border, as seen in the screenshot above.

If you'd like to change any or all of this styling:

1. Go to **Settings > Style**.
2. Below the preview window, select **Custom CSS**.
3. Add CSS to style the `.ko-glossary-search` class the way you'd like.
4. **Save** your changes.

For example, this CSS will keep the border the same size and width but change it to dark red, gives the entire box a light pink background color, and changes the font-color of all regular text in the box to white:

```
.ko-glossary-search {
    border: 2px solid #9c4728;
    background-color: #dc9b83;
    color: #ffffff;
}
```

It looks like this:



Sample of the glossary snippet search result box as styled using the above code

Style the term

By default, the term will be displayed in bold, and the definition will appear below it in slightly smaller regular font text.

The glossary term is styled using the `.ko-glossary-search-header` class. You can add custom CSS to change the font-weight, color, font-family, and so on. To do so:

1. Go to **Settings > Style**.
2. Below the preview window, select **Custom CSS**.

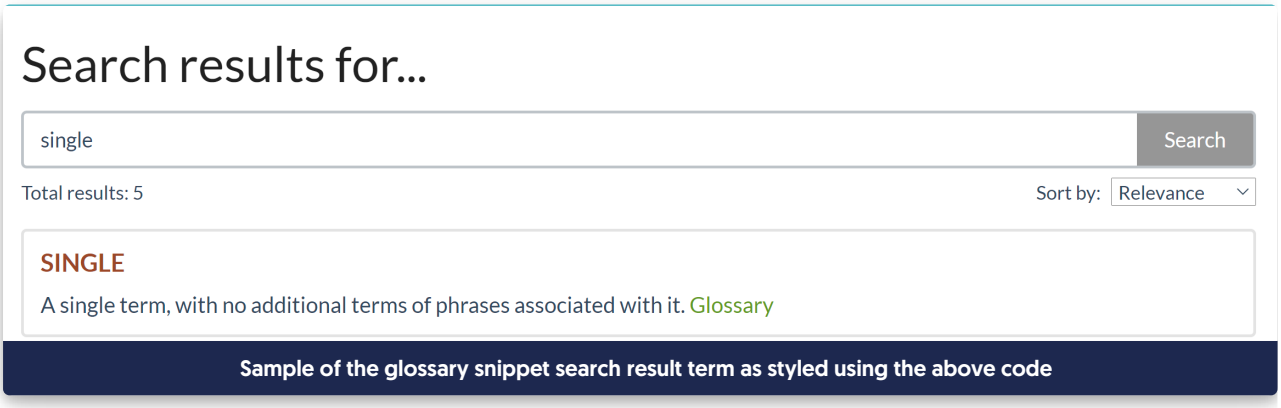
3. **Add CSS to style the** `.ko-glossary-search-header` **class the way you'd like.**

4. **Save your changes.**

For example, this CSS will display the glossary term in all uppercase letters and in a dark pink color:

```
.ko-glossary-search-header {
   text-transform: uppercase;
   color: #9c4728;
}
```

It looks like this:



Sample of the glossary snippet search result term as styled using the above code

Style the definition

By default, the term's definition will be displayed in bold, and the definition will appear below it in slightly smaller regular font text. You can style the definition font differently using one of two classes:

- `.ko-glossary-search-result` **will style the definition as well as the Glossary hyperlink at the end. Use this class if you want to set the font-family, etc., for all the text there. (Since the Glossary is a hyperlink, the color and a few other traits cannot be styled here and need to be styled for the Glossary hyperlink itself--see below. But the font-family added here will apply to that hyperlink!)**
- `.ko-glossary-search-result-definition` **will only style the definition. Use this class if you want to style the definition only but not touch the Glossary hyperlink.**

To add styling for either of these classes:

1. **Go to Settings > Style.**

2. **Below the preview window, select Custom CSS.**

3. **Add CSS to style the** `.ko-glossary-search-result` **class or the** `.ko-glossary-search-result-definition` **class the way you'd like.**

4. **Save your changes.**

For example, this code will set the full search result to display in Garamond, in all uppercase, and a dark pink color:

```
.ko-glossary-search-result {
    text-transform: uppercase;
    color: #9c4728;
    font-family: Garamond;
}
```

Which will produce this result:

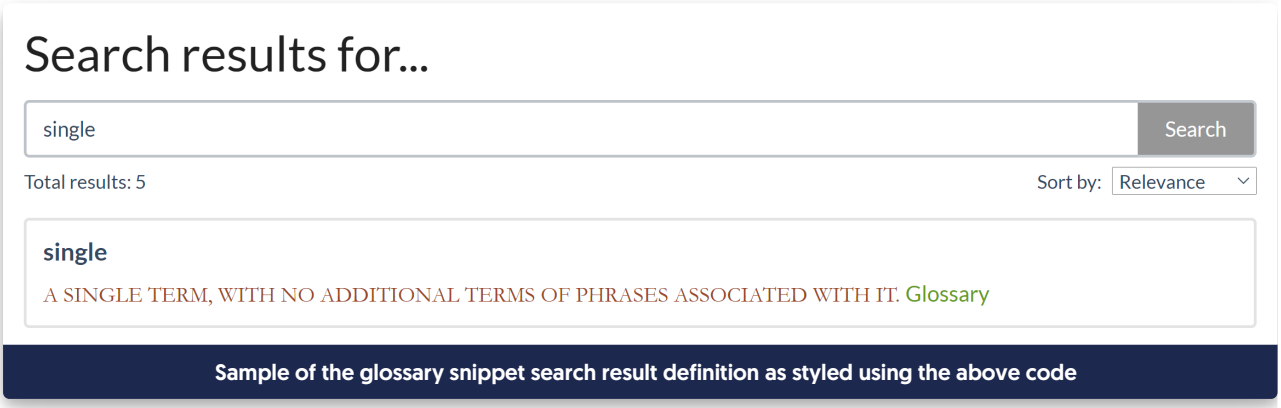


Sample of the glossary snippet search result text as styled using the above code

Whereas this code will make those changes only for the definition itself:

```
.ko-glossary-search-result-definition {
    text-transform: uppercase;
    color: #9c4728;
    font-family: Garamond;
}
```

Which looks like this (note that the Glossary link is still in the original font and case):



Sample of the glossary snippet search result definition as styled using the above code

Style the Glossary link

Last but not least, you can also style the hyperlink pointing to the Glossary. This gets styled using the .ko-glossary-search-link class, but since our themes have some global styles for hyperlinks specifically, the CSS to change it looks a little different.

If you're using the Minimalist theme, you'll want to style using: `.hg-minimalist-theme a.ko-glossary-search-link:not(btn)`. If you're using any of our other themes, style using `a.ko-glossary-search-link`. (And if you might switch between themes, you can use both, as we do in our code examples below!)

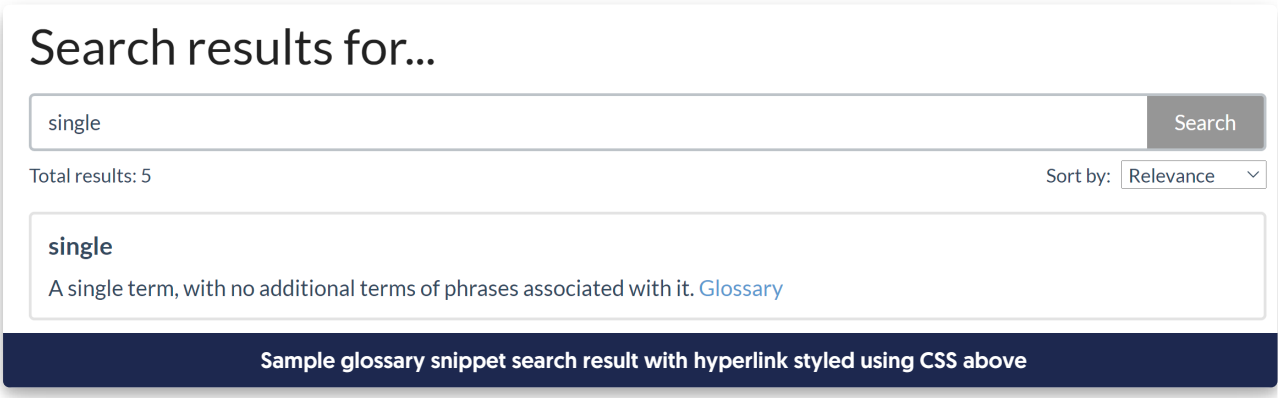
To

1. **Go to Settings > Style.**

2. **Below the preview window, select Custom CSS.**
3. **Add CSS to style the** `a.ko-glossary-search-link` **class for the link in its original state, or the** `a.ko-glossary-search-link:hover` **class for the link in its hover state. For the Minimalist theme only, include** `.hg-minimalist-theme` **first, as noted above.**
4. **Save your changes.**

For example, this CSS will change the hyperlink to a blue color:

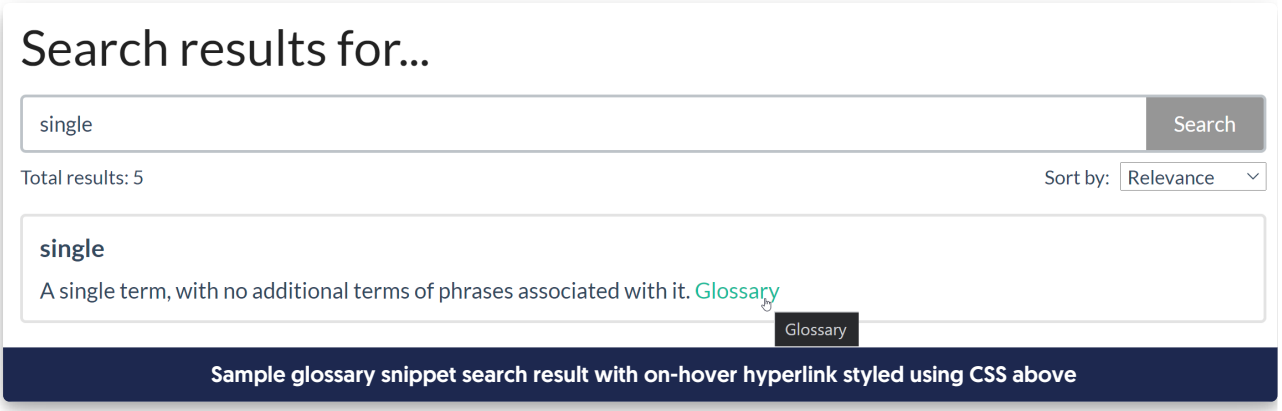
```
.hg-minimalist-theme a.ko-glossary-search-link:not(btn),
a.ko-glossary-search-link {
  color: #5C9AD1;
}
```



Sample glossary snippet search result with hyperlink styled using CSS above

And this CSS will change it to a blue-green color on-hover:

```
.hg-minimalist-theme a.ko-glossary-search-link:not(btn):hover,
a.ko-glossary-search-link:hover {
  color: #1abc9c;
}
```



Sample glossary snippet search result with on-hover hyperlink styled using CSS above

Add page numbers to PDFs

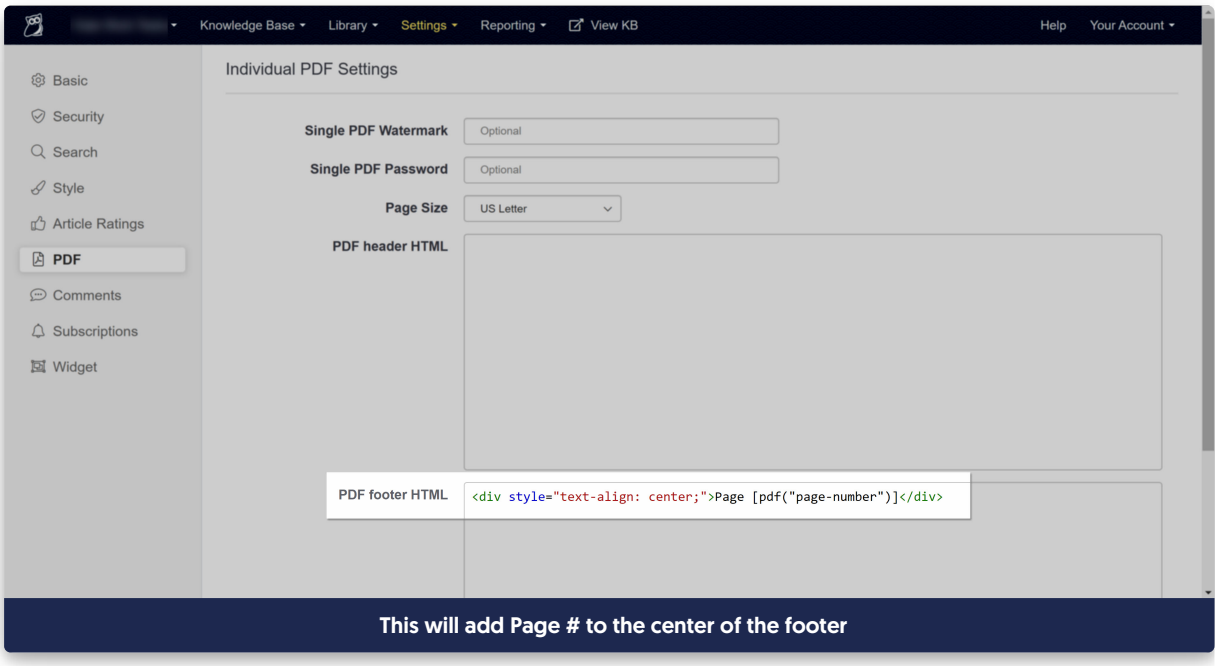
Last Modified on 12/05/2024 2:01 pm EST

You can add page numbers to the header or footer of all PDF exports in KnowledgeOwl, though the exact setup varies a bit based on the type of PDF. All methods use this merge code: `[pdf("page-number")]`

Individual article PDFs

To add page numbers to your individual article PDFs:

1. Go to **Settings > PDF**.
2. Add PDF Header HTML or PDF Footer HTML that includes the `[pdf("page-number")]` merge code. Here, I've added a centered div that will create "Page [number]":



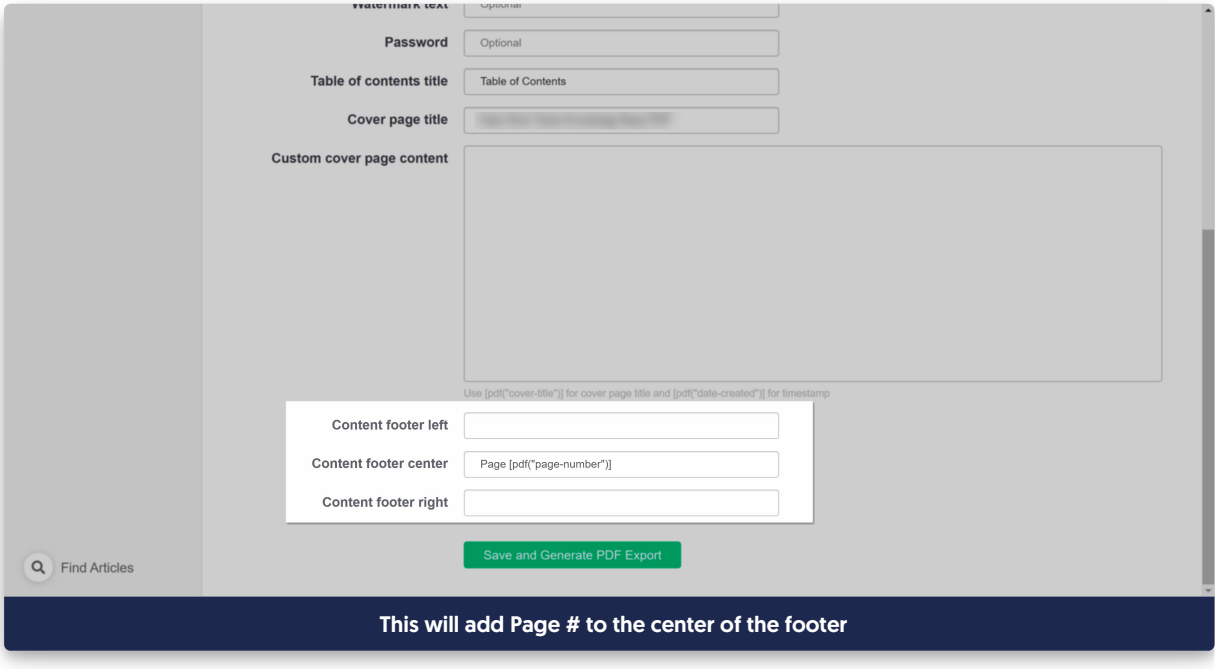
3. Be sure to **Save** your changes.

Standard & Custom PDF exports

For both the Standard and Custom PDF exports, you don't need to add full HTML. You can just add the page number merge code directly to the relevant field:

1. Go to **Knowledge Base > Exports.**
2. Click on **Standard PDF** to edit the full knowledge base standard PDF, or **Custom PDFs** and then the gear icon next to the custom PDF you'd like to add page numbers to.
3. Add the `[pdf("page-number")]` merge code into the Content footer left, center, or right, depending on where you'd like it. Here, we've added it to the center to get the same treatment as in the individual PDFs

above:



4. Be sure to **Save** and generate your PDF export.

Display content only in PDFs

Last Modified on 05/29/2024 5:28 pm EDT

There are two ways to customize the look and feel of individual article PDFs.

For general structure/layout of individual articles, go to Settings > PDF and adjust the settings there--you can add a watermark, password, header HTML, and footer HTML.

But if you want to show or hide content in PDFs, custom CSS is your friend.

The class "hg-pdf" is added to our PDF downloads. You can use this class to style elements differently in your PDF downloads. Add this class before the element you want to target, and you can create customized styles for your PDFs!

Here's how to add your logo to your PDFs:

1. Go to **Settings > Style**.
2. Below the preview pane, select **Custom HTML**.
3. Select **Article** from the Custom HTML dropdown.
4. Near the top of your article, wherever you'd like the logo to appear, add some HTML for your logo. We recommend using a div overall with a class of "pdf-logo", and putting the image inside that div, like this:

```
<div class="pdf-logo" align="center">
    <img src="https://dyzz9obi78pm5.cloudfront.net/app/image/id/1111/n/pdflogo.png" />
</div>
```

5. If you use the above code as a sample, be sure to replace the img src in row 2 with a URL of a valid image file in your File Library!
6. Go to **Custom CSS**.
7. Copy the CSS below and paste it into your Custom CSS. The first CSS here will hide the PDF logo in the live knowledge base; the second will display it only in PDFs.

```
/* Hide PDF logo in live knowledge base */
.pdf-logo {
   display:none;
}

/* Display PDF logo in PDFs only */
.hg-pdf .pdf-logo {
   display:block;
}
```

8. Be sure to **Save** your changes.



Note: Once you make changes to PDF styling, you'll only see these changes once PDFs are regenerated. For the Standard PDF and Custom PDF exports, you can generate these yourself. For individual article PDFs, save the article with a small change (such as some added text or a new paragraph break) to regenerate the PDF to see if you like your changes. Once you have the styling the way you want, contact us to regenerate all your article PDFs.

Snippet to force page breaks in PDFs

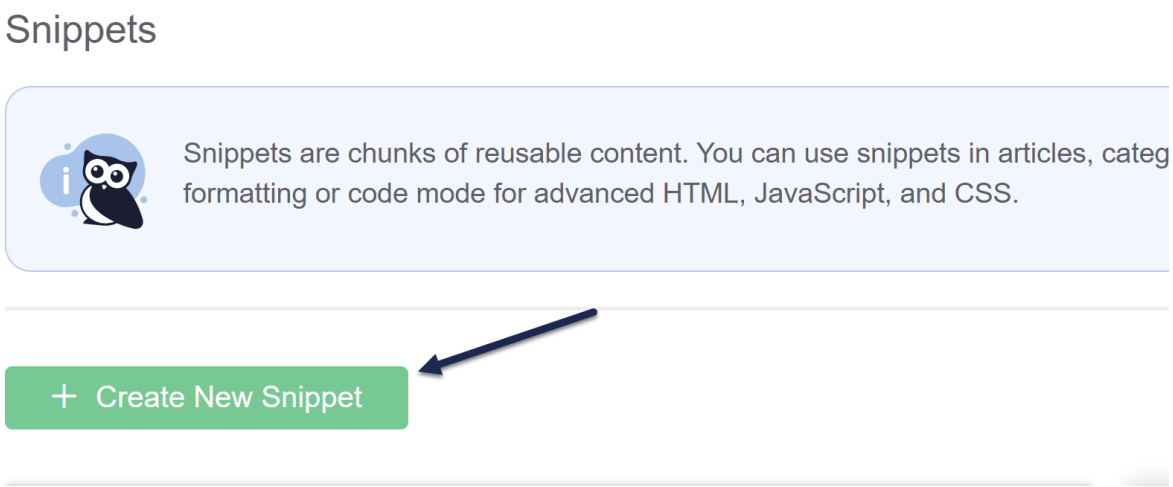
Last Modified on 05/29/2024 5:28 pm EDT

For individual article PDFs as well as the standard and custom PDF export options, sometimes a page break comes between two chunks of content you'd like to stay together (such as a numbered step and the screenshot that goes with that numbered step).

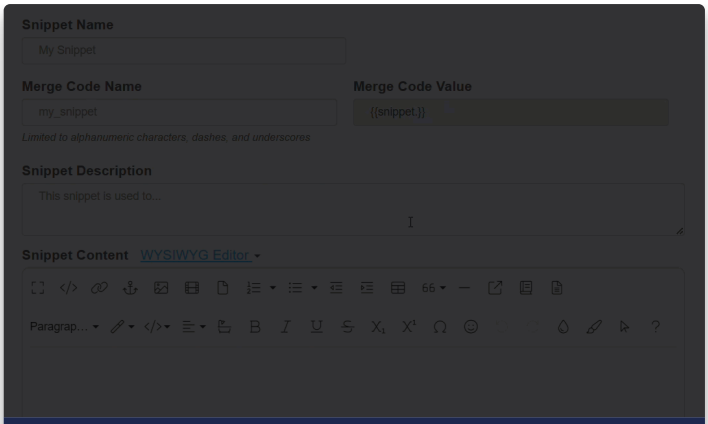
If you'd like to be able to enforce a page break before or after certain portions of an article, you can create a snippet that will force a PDF page break.

To do so:

1. Go to **Library > Snippets.**
2. Select the **+ Create New Snippet** button.



3. This will open a new page where you can define your snippet.
4. Be sure to give it a **Snippet Name.** Here, we use "PDF Page Break After."
5. The merge code will be automatically generated based on the snippet name.
6. Add a **Snippet Description** to explain what this snippet does. For example: "Add this snippet anywhere in individual articles where you'd like to force a page break in the PDF exports."
7. In the **Snippet Editor**, be sure **Code Editor** is selected from the dropdown.

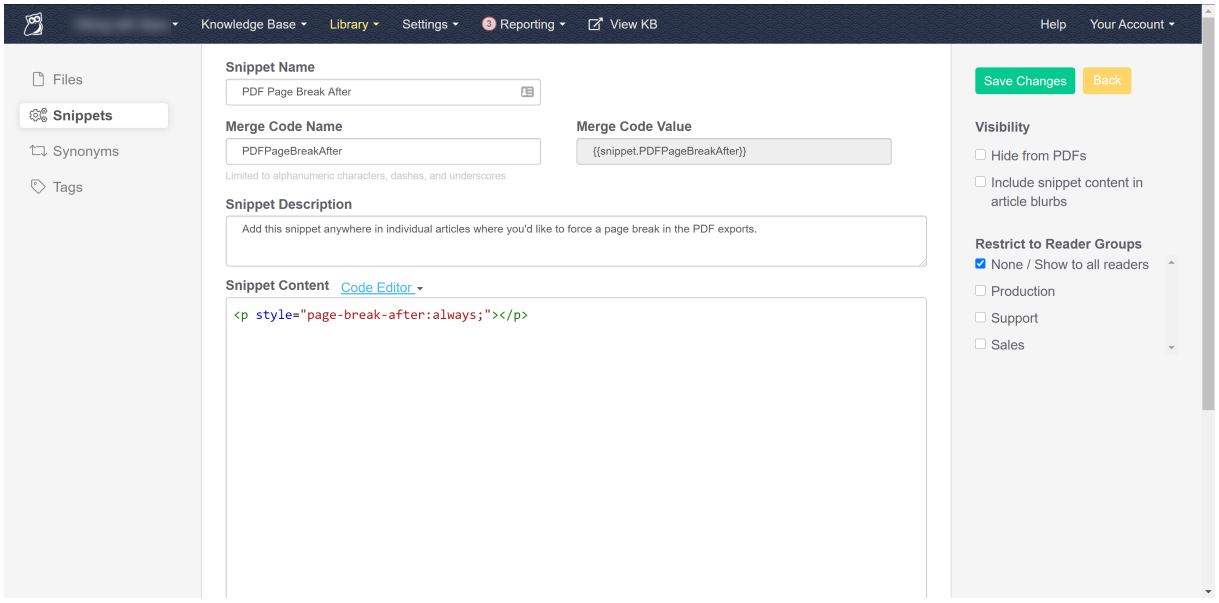


Select Code Editor in the Snippet Content dropdown

8. **Copy the code below and paste it into the Code Editor. This code creates an empty paragraph with CSS to force a page break after it:**

```
<p style="page-break-after:always;"></p>
```

9. **Click the Create button. Your completed snippet should look something like this:**



10. **Now that your snippet exists, use the Insert Snippet option in the editor to add the snippet into the place in any article where you'd like the page break to occur.**

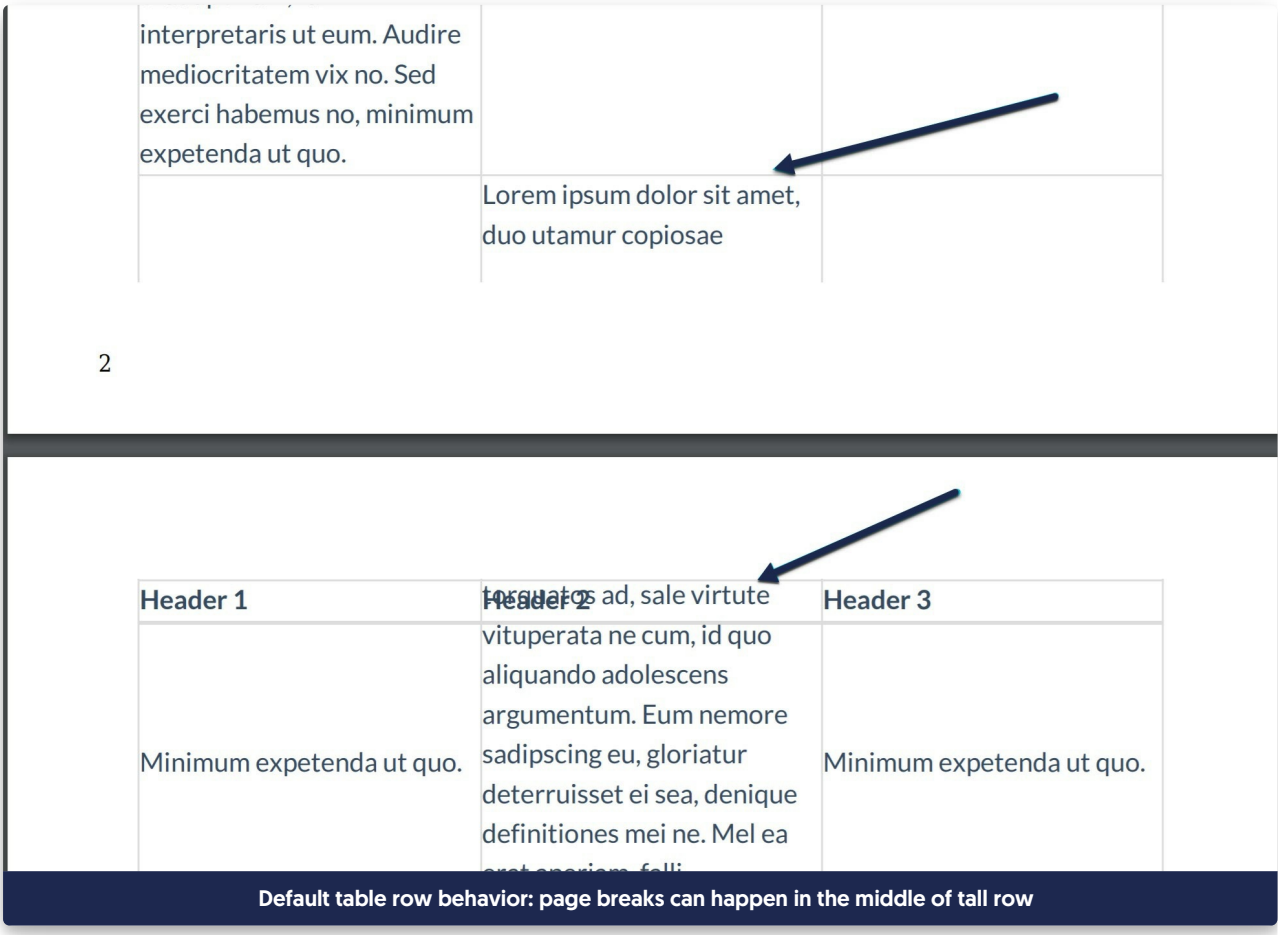


The Insert Snippet control in the editor

Prevent Page Breaks in PDF Table Rows

Last Modified on 05/29/2024 5:28 pm EDT

If you have table rows that span multiple lines, by default, the PDF generator won't make any effort to keep those multi-line rows on the same page if they fall on a page break. This is most evident when you have table row headers:



Default table row behavior: page breaks can happen in the middle of tall row

You can add some Custom CSS to prevent this mid-row page break and force page breaks to occur between table rows:

1. **Go to Settings > Style.**
2. **Copy the code below and paste it anywhere into the Custom CSS section below the preview pane.**

```
/* Force PDF page breaks between rows, not mid-row */
.hg-pdf table tr {
  page-break-inside: avoid;
}
```

Your code should look like this:

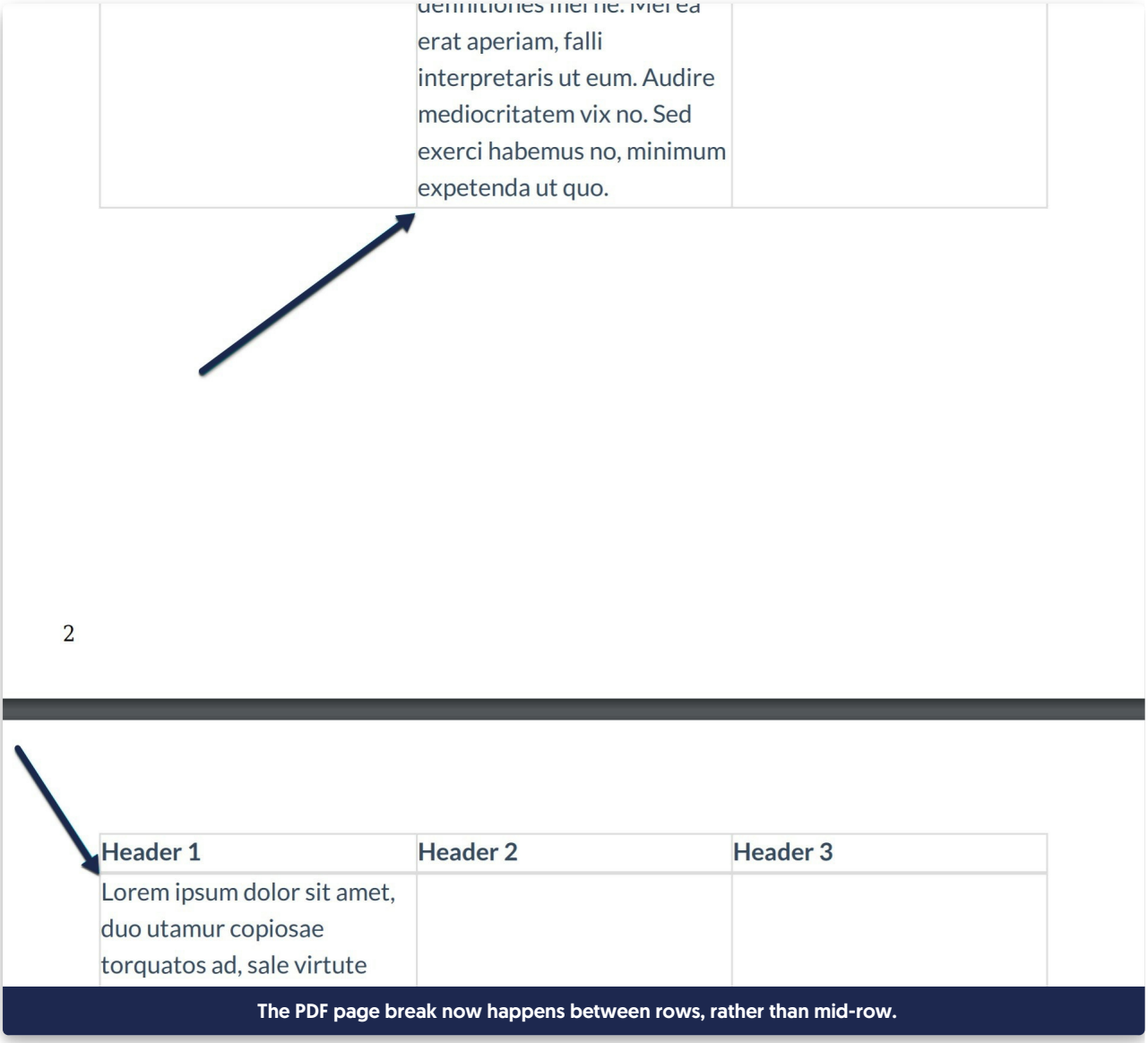
Custom CSS | Custom HTML | Custom <head>

Custom CSS

```
/* Force PDF page breaks between rows, not mid-row */
.hg-pdf table tr {
  page-break-inside: avoid;
}
```

3. **Save.**

Once you re-save the article, your PDF should now break properly between the rows:



The PDF page break now happens between rows, rather than mid-row.

As with all PDF style settings, by default this style change will only be applied to existing articles once they are resaved. Contact us to have all of your existing article PDFs regenerated with the new style.

To choose where to insert page breaks in an article, check out our Snippet to Force Page Breaks in PDFs.

Display full URL of links in PDFs

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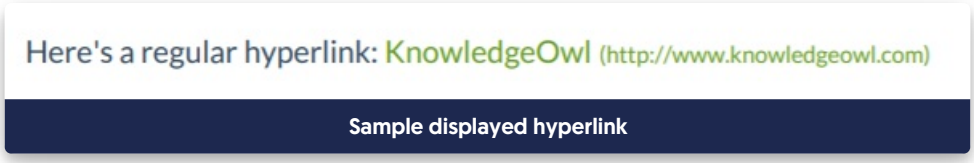
The PDF generator will create clickable hyperlinks for most hyperlinks. (It just doesn't handle anchor hyperlinks well.)

But if you're using PDFs as printed resources, you may want to also display the actual URL of the hyperlink. You can display something like:



To create these parentheses with the full URL text automatically, you can add some CSS to your knowledge base and then regenerate PDFs:

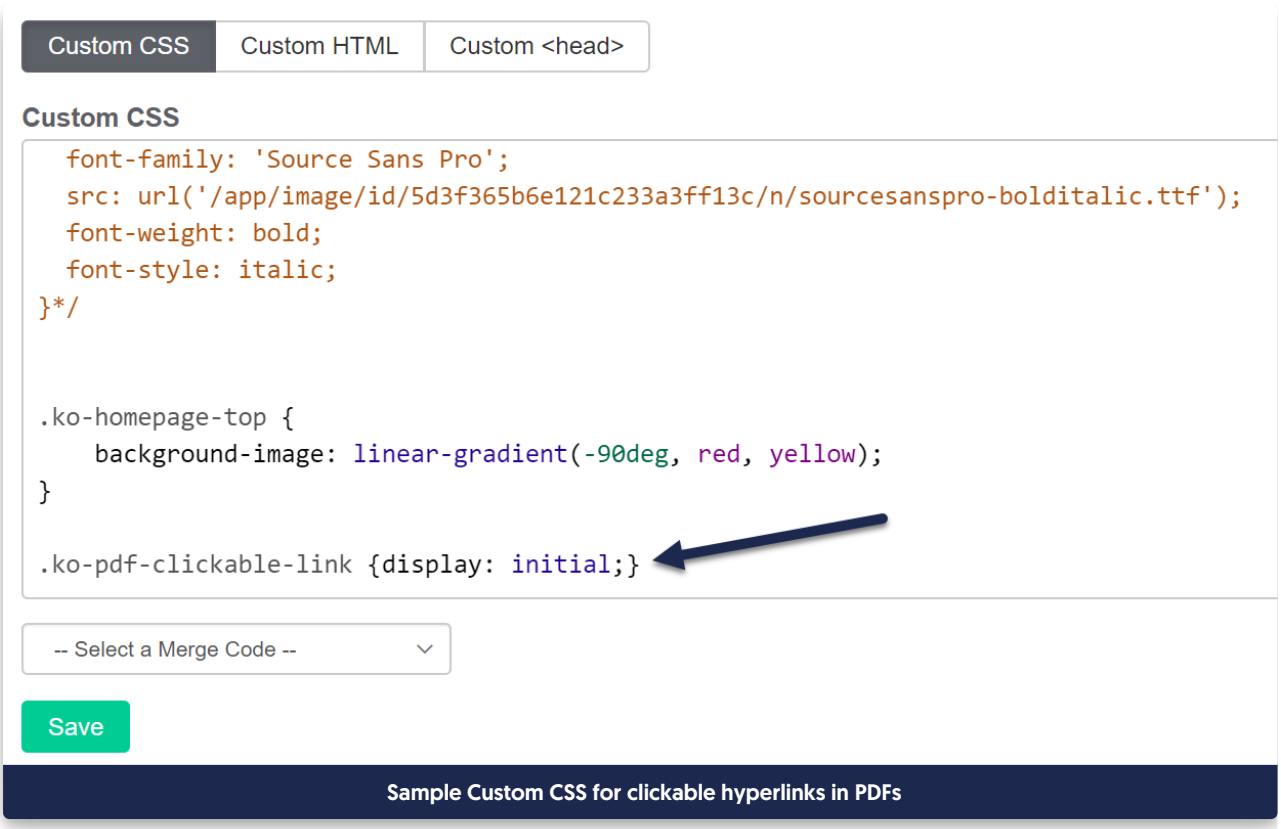
1. Go to **Settings > Style**.
2. Below the preview pane, be sure **Custom CSS** is selected.
3. Copy the code below and paste it into the bottom of your Custom CSS.

```
.ko-pdf-clickable-link {display: initial;}
```

4. **Save** your changes.

Note: This Custom CSS will not generate clickable hyperlinks for same-page anchors.

Once you're done, your Style Settings should include this line:



Sample Custom CSS for clickable hyperlinks in PDFs

Which will produce a treatment like this (though the exact color of your hyperlinks will vary based on your style settings!):



Sample in-PDF clickable hyperlink

Customize how highlighted glossary terms and definitions look

Last Modified on 05/29/2024 5:28 pm EDT

The default highlighting of a glossary term looks like this: test.

You can customize this a bit using custom CSS.

Terms

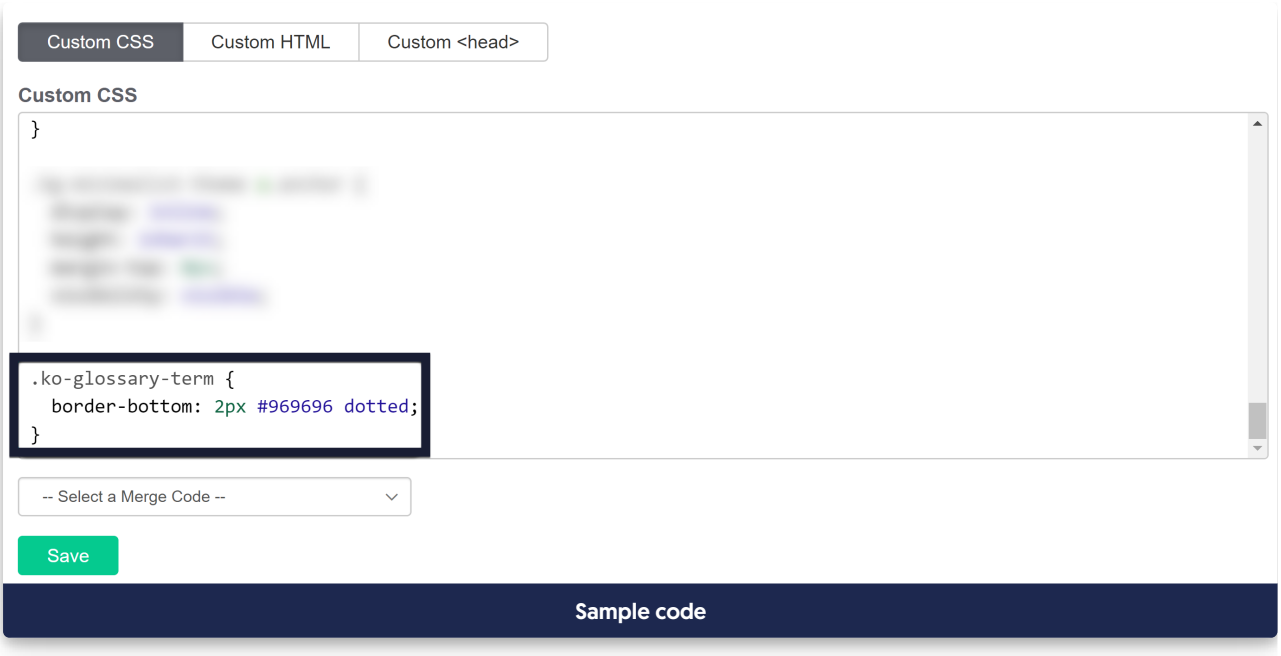
You can customize the look and feel of your glossary terms (the double underline) to change the thickness of the lines, the color, and the line style. To do so:

1. Go to **Settings > Style**.
2. Under the preview pane, select **Custom CSS**.
3. Copy the code below and paste it into the Custom CSS window.

```
/* Change glossary term underlining look */
.ko-glossary-term {
  border-bottom: 3px #bbb double;
}
```

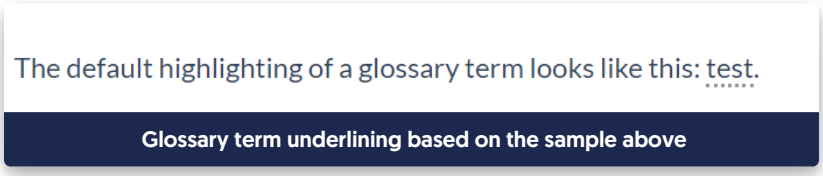
4. You can make changes to the look by editing:
    - The thickness of the underlines: change 3px to the thickness you'd like to use. Lower pixels are thinner; higher are thicker
    - The color of the underlines: change #bbb to the color of your choice
    - The style of the line: change "double" to the style of your choice, using standard border-style options (double, dashed, dotted, etc.). If you're unfamiliar with border-style, see this quick reference for the available options.
5. Once you've made your changes, **Save** your Style Settings. All glossary terms are now updated with the changes you've made.

In this sample, we've change the line width to 2px, made it a darker grey, and shifted it to a single dotted line instead:



Sample code

Which will produce this treatment:



Glossary term underlining based on the sample above

Definitions

The hover-over definition can also be customized.

1. **Go to Settings > Style.**
2. **Under the preview pane, select Custom CSS.**
3. **Copy the code below and paste it into the Custom CSS window.**

```
/* Change on-hover glossary definition display */
span.ko-glossary-term + .popover {
  font-size: 14px;
  font-weight: normal;
  line-height: 1.2;
}
```

4. **You can change the font size and weight (bold vs. normal) by editing appropriately. The popover is done using Bootstrap. See their popover documentation for more options.**
5. **Once you've made your changes, Save your Style Settings. All glossary definitions are now updated with the changes you've made.**

Keep glossary header visible when scrolling

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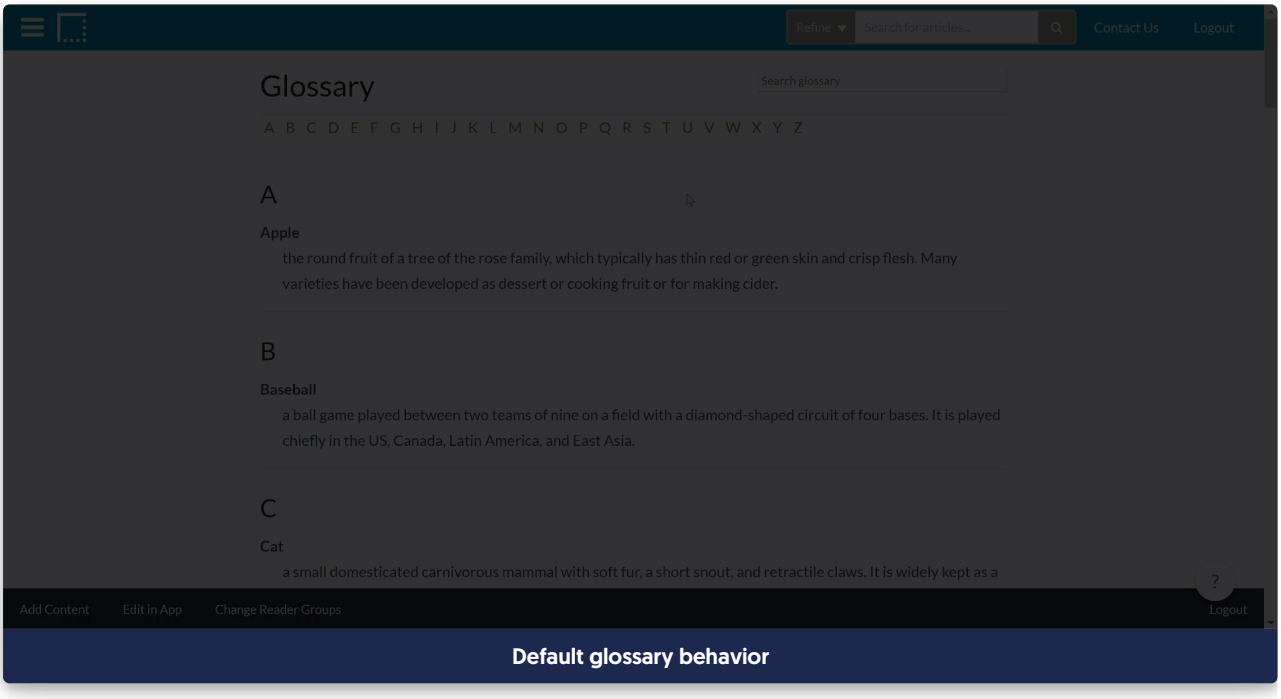
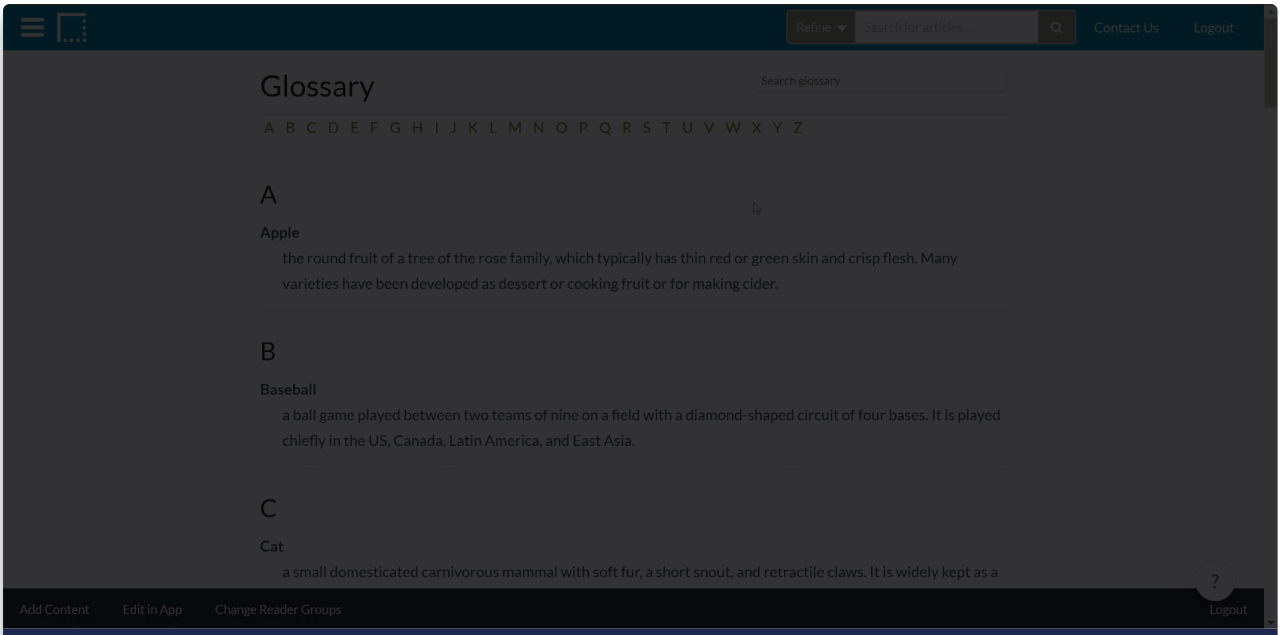
By default, when you view the Glossary, the title and the quick-links to each letter will disappear as you scroll the page.



Default glossary behavior

If you have a lot of glossary terms and you're linking to your glossary in your table of contents or navigation, you may want to keep the Glossary header visible while scrolling.



Sticky glossary header

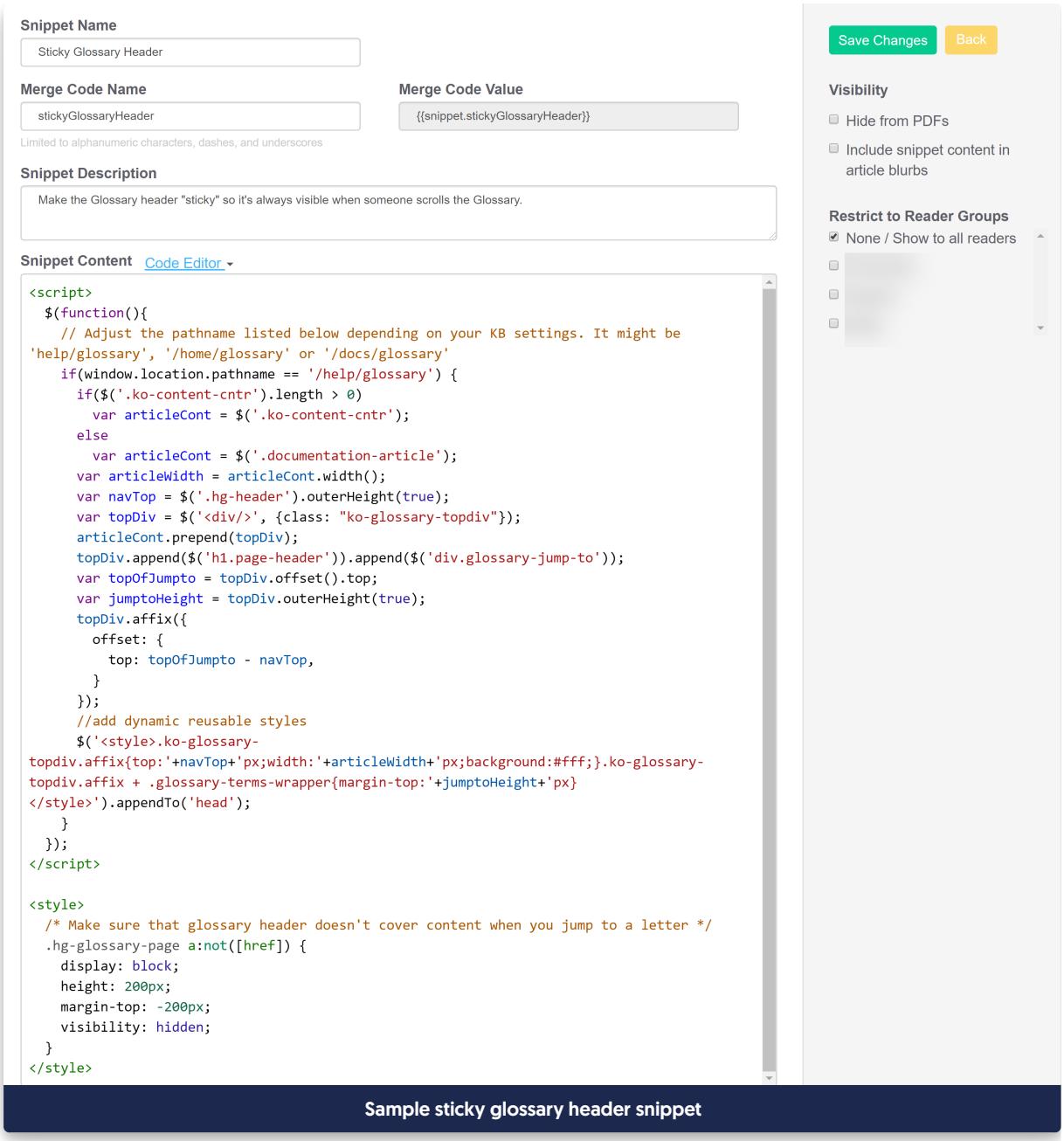
To add this functionality to your knowledge base, you'll create a snippet to store the code and then add that snippet to the Custom HTML:

1. Go to **Library > Snippets**.
2. Click the **+ New Snippet** button.
3. Give your snippet a **Name** (Sticky glossary header, in our example).
4. Give your snippet a **Description**, like "Make the glossary header "sticky" so it's always visible as people scroll."
5. Click the dropdown next to **Snippet Content** to select **Code Editor**.
6. Copy the script below and paste it into the code editor.

```
<script>
 $(function(){
  // Adjust the pathname listed below depending on your KB settings. It might be 'help/glossary', '/home/glossary'
  if(window.location.pathname == '/help/glossary') {
   if($('.ko-content-cntr').length > 0)
    var articleCont = $('.ko-content-cntr');
   else
    var articleCont = $('.documentation-article');
   var articleWidth = articleCont.width();
   var navTop = $('.hg-header').outerHeight(true);
   var topDiv = $('<div/>', {class: "ko-glossary-topdiv"});
   articleCont.prepend(topDiv);
   topDiv.append($('h1.page-header')).append($('div.glossary-jump-to'));
   var topOfJumpto = topDiv.offset().top;
   var jumptoHeight = topDiv.outerHeight(true);
   topDiv.affix({
    offset: {
     top: topOfJumpto - navTop,
    }
   });
   //add dynamic reusable styles
   $('<style>.ko-glossary-topdiv.affix{top:'+navTop+'px;width:'+articleWidth+'px;background:#fff;}.ko-glossary
  }
 });
</script>

<style>
 /* Make sure that glossary header doesn't cover content when you jump to a letter */
 .hg-glossary-page a:not([href]) {
  display: block;
  height: 200px;
  margin-top: -200px;
  visibility: hidden;
 }
</style>
```

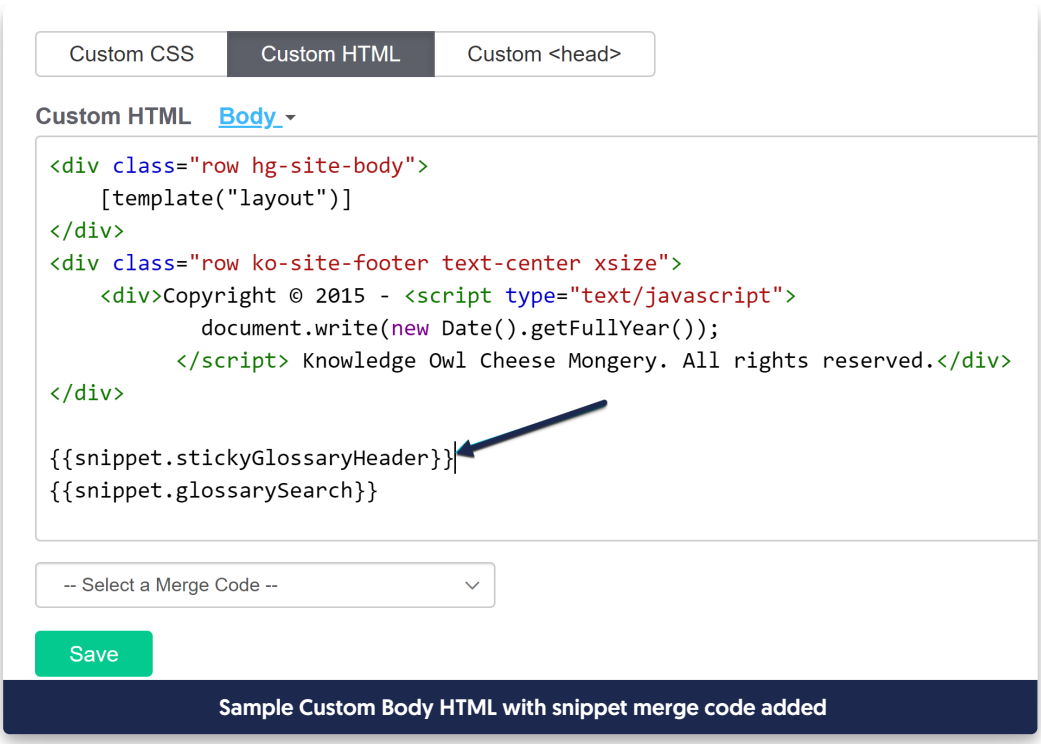
7. **The code is used for knowledge bases with /help/ in their URLs. If you are using 'home' or 'docs' instead, you'll need to update the window.location.pathname in line 4 based on your knowledge base's settings to** `'/home/glossary'` **or** `'/docs/glossary'` **.**

8. **Click the Create button in the upper right. Here's what a completed snippet might look like:**



Sample sticky glossary header snippet

9. Once it confirms your snippet is created, copy the Merge Code Value ({{snippet.stickyGlossaryHeader}} in our example).
10. Go to **Settings > Style**.
11. Below the preview pane, click on **Custom HTML** and select **Body** from the dropdown.
12. Paste the snippet merge code value into the bottom of the window.
13. Click **Save**.



Sample Custom Body HTML with snippet merge code added

Your glossary's header should now stay at the top regardless of how far down your readers scroll.

Style the letters at the top of the glossary

Last Modified on 05/29/2024 5:28 pm EDT

When you view the glossary, all letters in the alphabet are displayed across the top for quick navigation.

When no glossary terms begin with a letter, that letter is displayed as normal text. The letters containing glossary terms are hyperlinked, and will appear the same color as other hyperlinks in your knowledge base.

You can customize the color and look and feel of inactive (no hyperlink) and active (hyperlinked) glossary header letters.

Active letters

To change the color of the glossary active/hyperlinked letters:

1. Go to **Settings** > **Style**.
2. Make sure you're viewing the **Custom CSS** section.
3. Copy this code and paste it into the bottom of your Custom CSS:

```
/* Set color of active Glossary navigation letters */
a.glossary-jump-to-link:not(.btn) {
  color: #1f9baa;
}
```

4. To change the color, update the hex codein line 3 to be the color you'd like. You can also add additional styling, like changing the font-weight, font-family, underlining, etc.
5. If you'd like, you can also update the color of the link on-hover. To do so, repeat the steps above but copy and paste this code:

```
/* Set color of active Glossary navigation letters on-hover*/
a.glossary-jump-to-link:not(.btn):hover {
  color: #fc9f00;
}
```

6. Be sure to **Save** your changes.

Inactive letters

To change the color of the glossary inactive/unhyperlinked letters:

1. Go to **Settings > Style**.
2. Make sure you're viewing the **Custom CSS** section.
3. Copy this code and paste it into the bottom of your Custom CSS:

```
/* Set color of inactive Glossary navigation letters */
span.glossary-jump-to-link {
  color: #1f9baa;
}
```

4. To change the color, update the hex code in row 2 to be the color you'd like. You can also add additional styling, like changing the font-weight, font-family, underlining, etc.
5. Be sure to **Save** your changes.

See an example

Here, I've added Custom CSS to adjust the active glossary letters to be blue, the inactive letters to be a light orange, and active glossary letters to turn a dark orange and get underlined when they're hovered over:



And here's the sample end-product, where I have active terms in A and S and I'm hovering over the S:


Glossary
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
Sample letter treatment

Add search to the glossary page

Last Modified on 05/29/2024 5:27 pm EDT

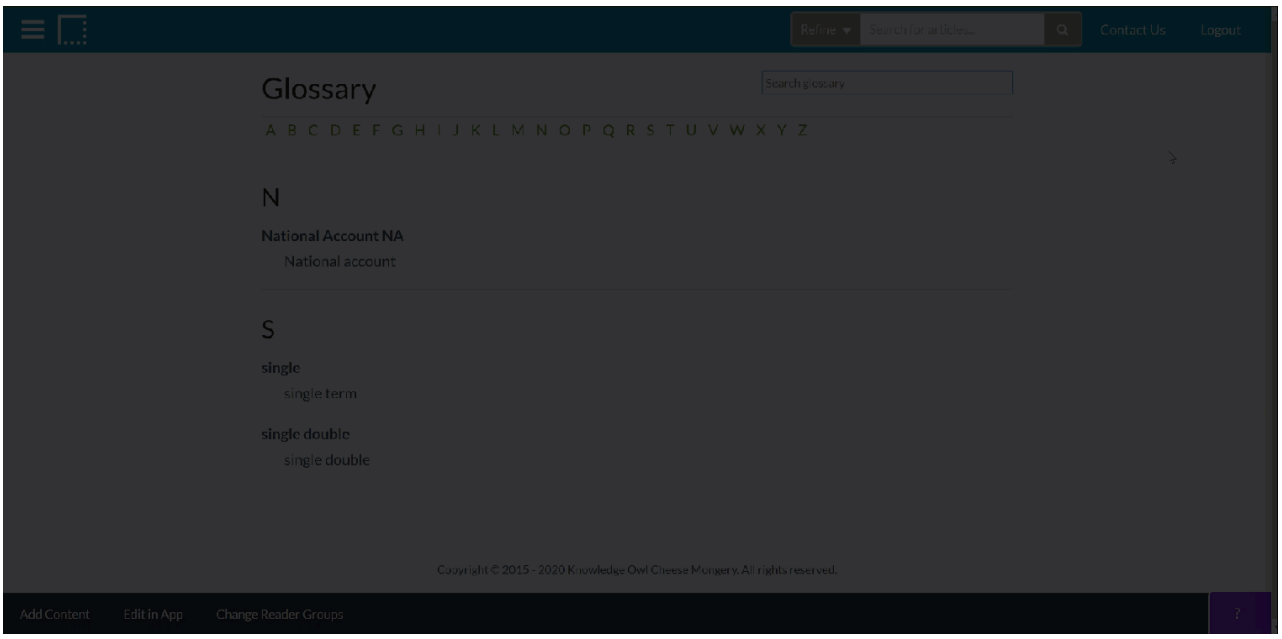
You might want to add a search box to your glossary page if you:

- Have a lot of glossary terms
- Have readers who frequently reference your glossary
- and/or have a link to your glossary in your table of contents

We've worked up a code snippet that:

- Creates a search box at the top of the Glossary with "Search glossary" placeholder text
- As you type to search, it will collapse glossary letters/sections with no matches and highlight terms that match your search phrase in yellow (you can change this color)

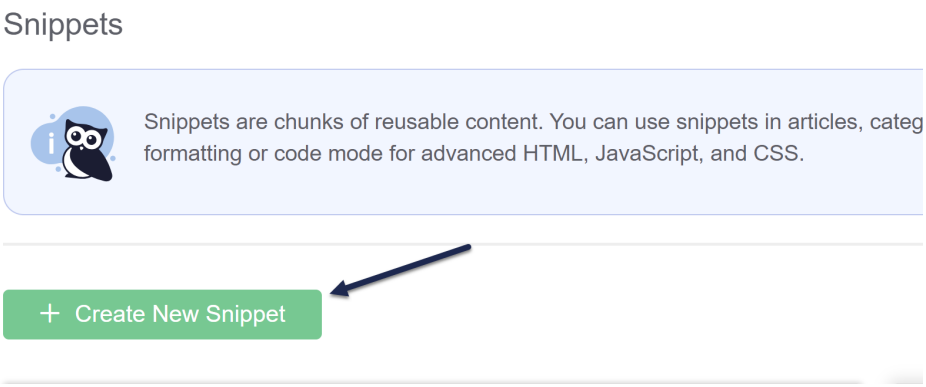
Here it is in action with the default settings:



Create the snippet and add it to your knowledge base

To add this search box to your glossary:

1. Go to **Library > Snippets.**
2. Click the **+ Create New Snippet** button.

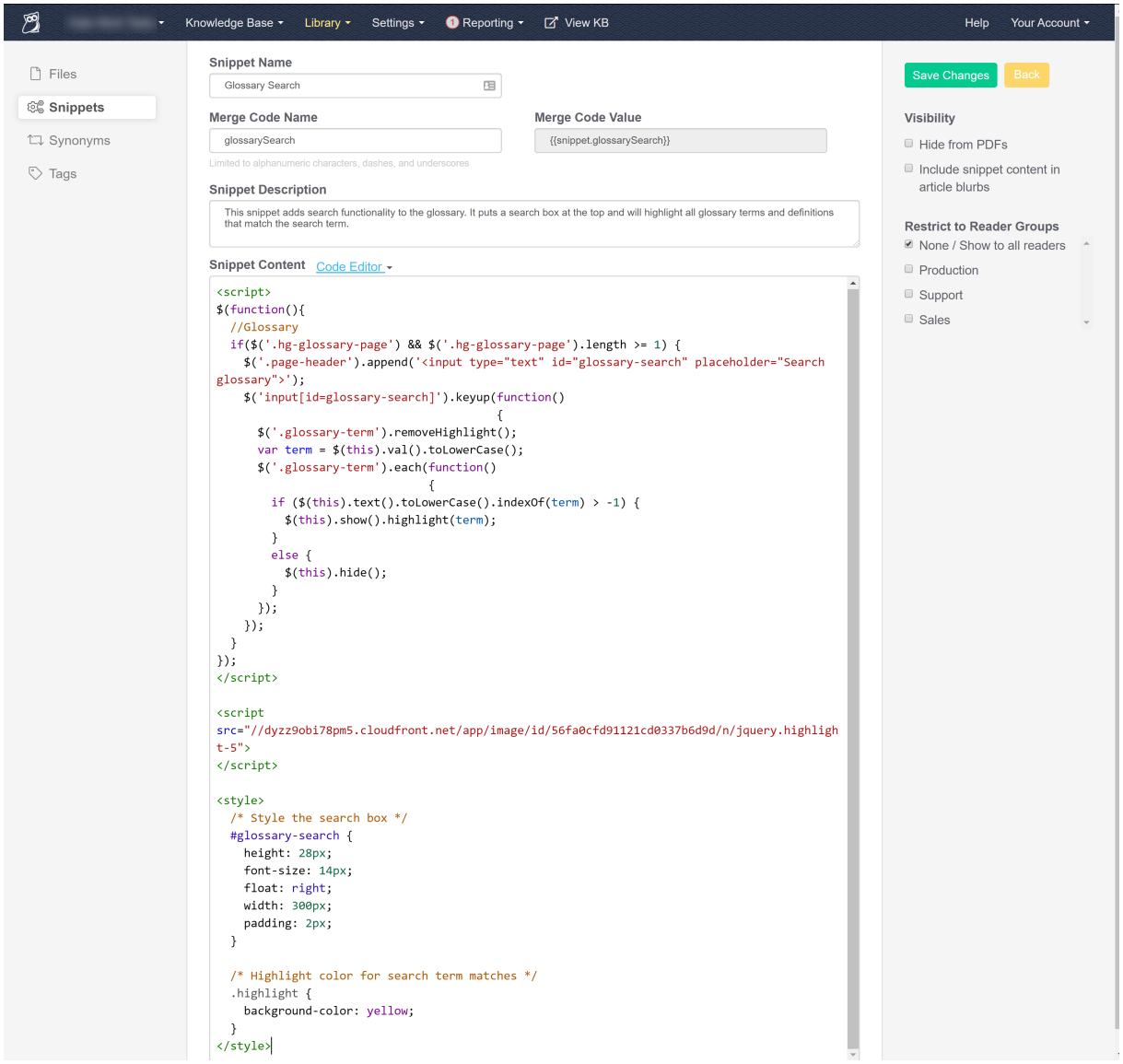


3. **This will open a Snippet details screen. Give your snippet a Name, like "Glossary Search".**
4. **Give your snippet a Description, like "This snippet adds a search box to the glossary."**
5. **In the Snippet Content section, click the dropdown to select the Code Editor.**
6. **Copy the code below and paste it into the Code Editor window.**

```
<script>
$(function(){
 //Glossary
 if($('.hg-glossary-page') && $('.hg-glossary-page').length >= 1) {
  $('.page-header').append('<input type="text" id="glossary-search" placeholder="Search glossary">');
  $('input[id=glossary-search]').keyup(function()
                                {
    $('.glossary-term').removeHighlight();
    var term = $(this).val().toLowerCase();
    $('.glossary-term').each(function()
                         {
      if ($(this).text().toLowerCase().indexOf(term) > -1) {
        $(this).show().highlight(term);
      }
      else {
        $(this).hide();
      }
    });
  });
 }
});
</script>


<script src="https://dyzz9obi78pm5.cloudfront.net/app/image/id/56fa0cfd91121cd0337b6d9d/n/jquery.highlight-5
</script>


<style>
 /* Style the search box */
 #glossary-search {
  height: 28px;
  font-size: 14px;
  float: right;
  width: 300px;
  padding: 2px;
 }

 /* Highlight color for search term matches */
 .highlight {
  background-color: yellow;
 }
</style>
```

7. **Once you're done, click the Create button in the upper right.**

8. **So a completed snippet might look like this:**



9. Once your snippet is created, copy the snippet **Merge Code Value**.
10. Go to **Settings > Style**.
11. Below the preview pane, click on **Custom HTML** and be sure the **Body** is selected.
12. Paste your merge code in at the bottom of your Custom HTML Body (or between scripts), and save.
13. You should now have a search box on your glossary page!

Common tweaks

Once the snippet is working, you can make changes to the snippet to adjust the style:

- **Change the placeholder text:** In row 4 (the first script at the top):

```
$('.page-header').append('<input type="text" id="glossary-search" placeholder="Search glossary">');
```

Replace "Search glossary" with the placeholder text you'd like to use, for example:

```
$('.page-header').append('<input type="text" id="glossary-search" placeholder="Start typing to search glossary.
```

- **Change the highlight color: in the style section, at row 41, replace the .highlight background-colorwith a color of your choice, for example:**

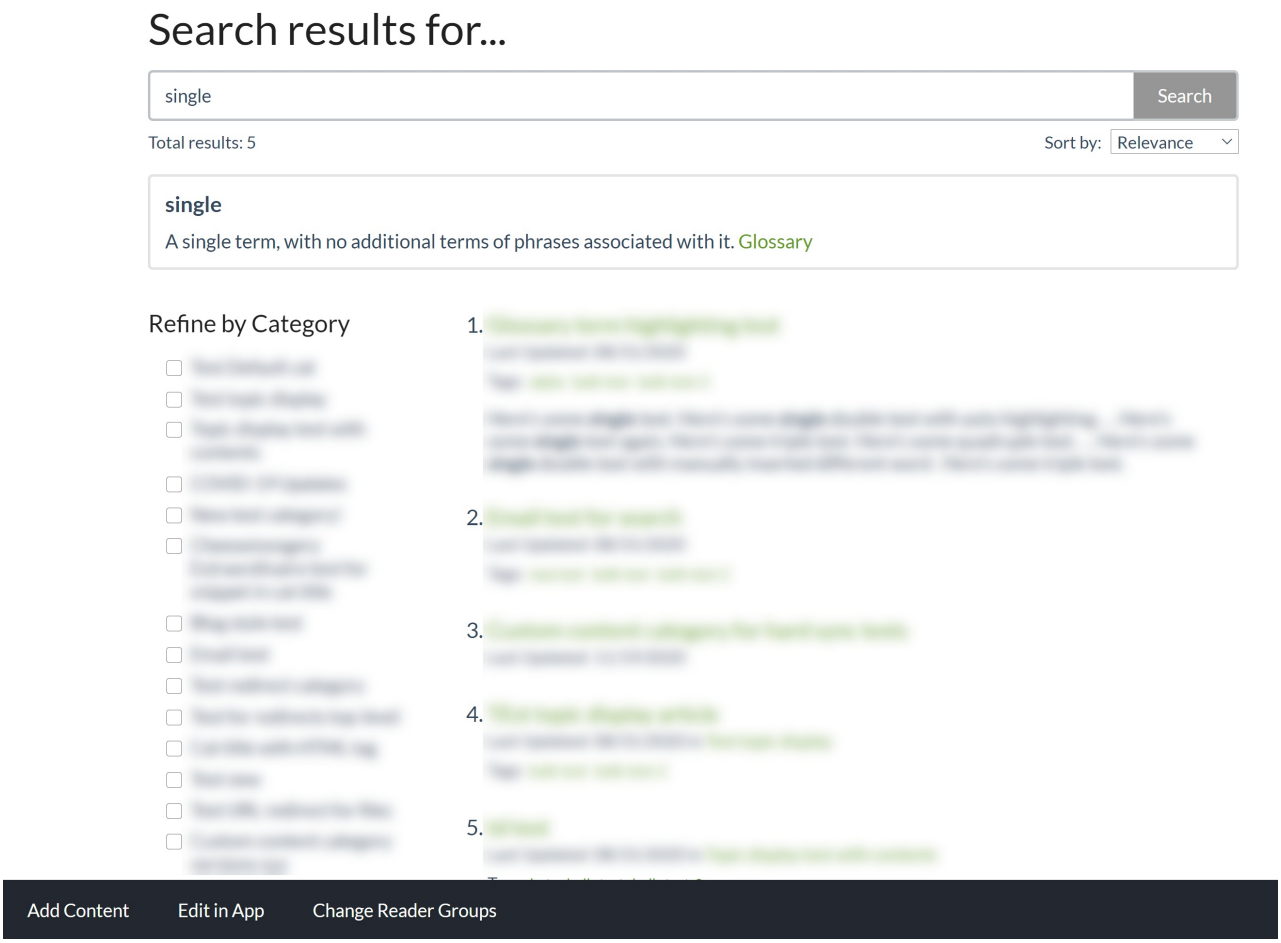
```
/* Highlight color for search term matches */
  .highlight {
    background-color: #80bd01;
  }
```

- **Change the style of the search box: you can change the height, font-size, width, etc. by updating the appropriate values in the style section's #glossary-search styles.**

Style the glossary snippet search results

Last Modified on 05/29/2024 5:28 pm EDT

If you've enabled the option to display glossary snippets in your search results, you can style the snippets in a few ways.



Style the box

You can style the box the result displays in, to adjust the background color, border, border color, thickness, and so on.

The default styling for this box is:

```
.ko-glossary-search {
    border: 2px solid #e3e3e3;
    border-radius: 4px;
    margin: 15px 0;
    padding: 12px;
    position: relative;
}
```

This creates a box with a light grey border, with a white background and some padding between the text and the border, as seen in the screenshot above.

If you'd like to change any or all of this styling:

1. Go to **Settings > Style**.
2. Below the preview window, select **Custom CSS**.
3. Add CSS to style the `.ko-glossary-search` class the way you'd like.
4. **Save** your changes.

For example, this CSS will keep the border the same size and width but change it to dark red, gives the entire box a light pink background color, and changes the font-color of all regular text in the box to white:

```
.ko-glossary-search {
    border: 2px solid #9c4728;
    background-color: #dc9b83;
    color: #ffffff;
}
```

It looks like this:



Sample of the glossary snippet search result box as styled using the above code

Style the term

By default, the term will be displayed in bold, and the definition will appear below it in slightly smaller regular font text.

The glossary term is styled using the `.ko-glossary-search-header` class. You can add custom CSS to change the font-weight, color, font-family, and so on. To do so:

1. Go to **Settings > Style**.
2. Below the preview window, select **Custom CSS**.

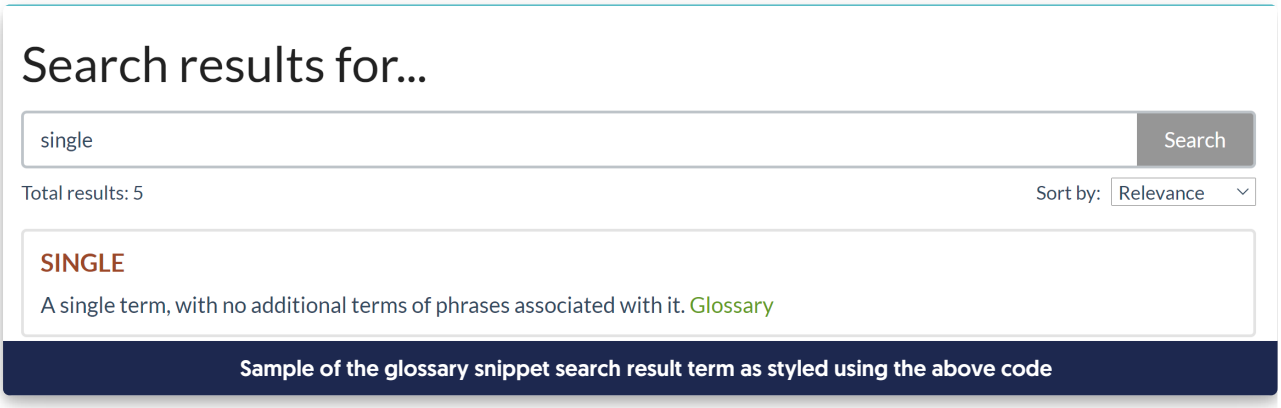
3. **Add CSS to style the** `.ko-glossary-search-header` **class the way you'd like.**

4. **Save your changes.**

For example, this CSS will display the glossary term in all uppercase letters and in a dark pink color:

```
.ko-glossary-search-header {
   text-transform: uppercase;
   color: #9c4728;
}
```

It looks like this:



Sample of the glossary snippet search result term as styled using the above code

Style the definition

By default, the term's definition will be displayed in bold, and the definition will appear below it in slightly smaller regular font text. You can style the definition font differently using one of two classes:

- `.ko-glossary-search-result` **will style the definition as well as the Glossary hyperlink at the end. Use this class if you want to set the font-family, etc., for all the text there. (Since the Glossary is a hyperlink, the color and a few other traits cannot be styled here and need to be styled for the Glossary hyperlink itself--see below. But the font-family added here will apply to that hyperlink!)**
- `.ko-glossary-search-result-definition` **will only style the definition. Use this class if you want to style the definition only but not touch the Glossary hyperlink.**

To add styling for either of these classes:

1. **Go to Settings > Style.**

2. **Below the preview window, select Custom CSS.**

3. **Add CSS to style the** `.ko-glossary-search-result` **class or the** `.ko-glossary-search-result-definition` **class the way you'd like.**

4. **Save your changes.**

For example, this code will set the full search result to display in Garamond, in all uppercase, and a dark pink color:

```
.ko-glossary-search-result {
    text-transform: uppercase;
    color: #9c4728;
    font-family: Garamond;
}
```

Which will produce this result:

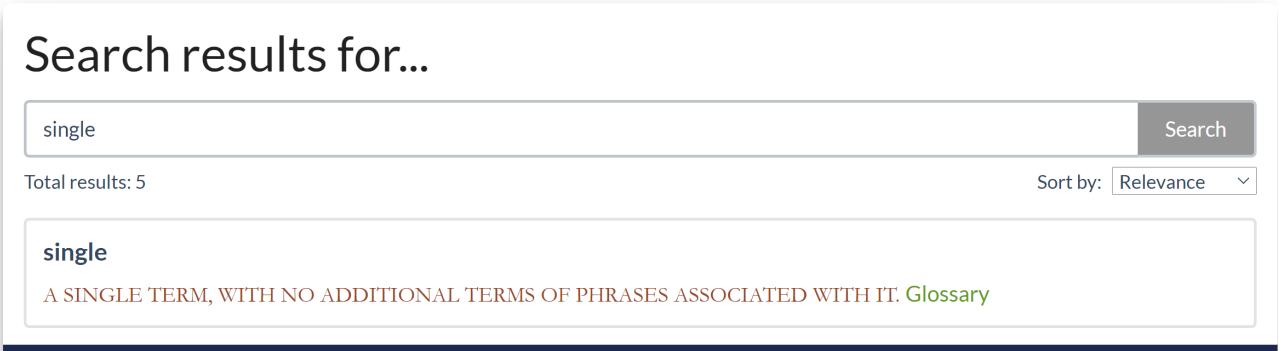


Sample of the glossary snippet search result text as styled using the above code

Whereas this code will make those changes only for the definition itself:

```
.ko-glossary-search-result-definition {
    text-transform: uppercase;
    color: #9c4728;
    font-family: Garamond;
}
```

Which looks like this (note that the Glossary link is still in the original font and case):



Sample of the glossary snippet search result definition as styled using the above code

Style the Glossary link

Last but not least, you can also style the hyperlink pointing to the Glossary. This gets styled using the .ko-glossary-search-link class, but since our themes have some global styles for hyperlinks specifically, the CSS to change it looks a little different.

If you're using the Minimalist theme, you'll want to style using: `.hg-minimalist-theme a.ko-glossary-search-link:not(btn)` **. If you're using any of our other themes, style using** `a.ko-glossary-search-link` **. (And if you might switch between themes, you can use both, as we do in our code examples below!)**

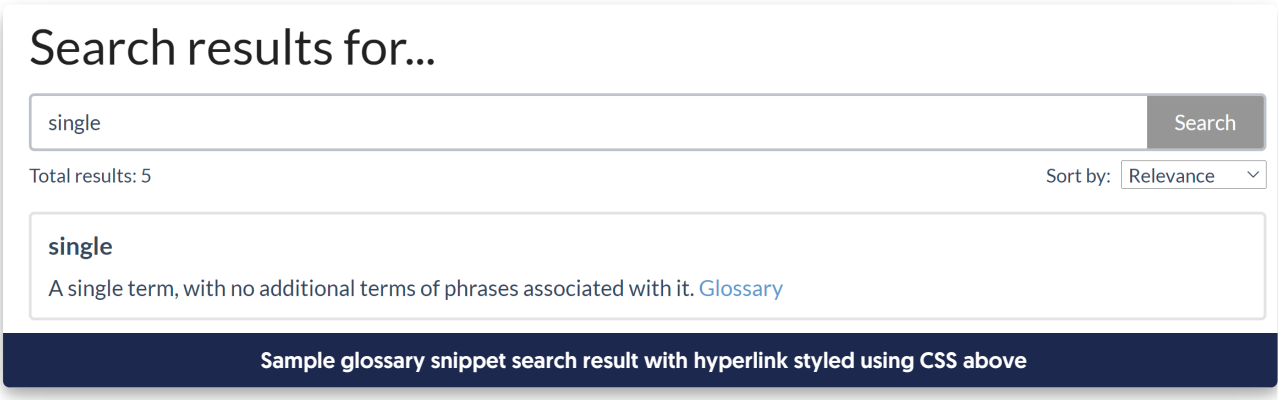
To

1. **Go to Settings > Style.**

2. **Below the preview window, select Custom CSS.**
3. **Add CSS to style the** `a.ko-glossary-search-link` **class for the link in its original state, or the** `a.ko-glossary-search-link:hover` **class for the link in its hover state. For the Minimalist theme only, include** `.hg-minimalist-theme` **first, as noted above.**
4. **Save your changes.**

For example, this CSS will change the hyperlink to a blue color:

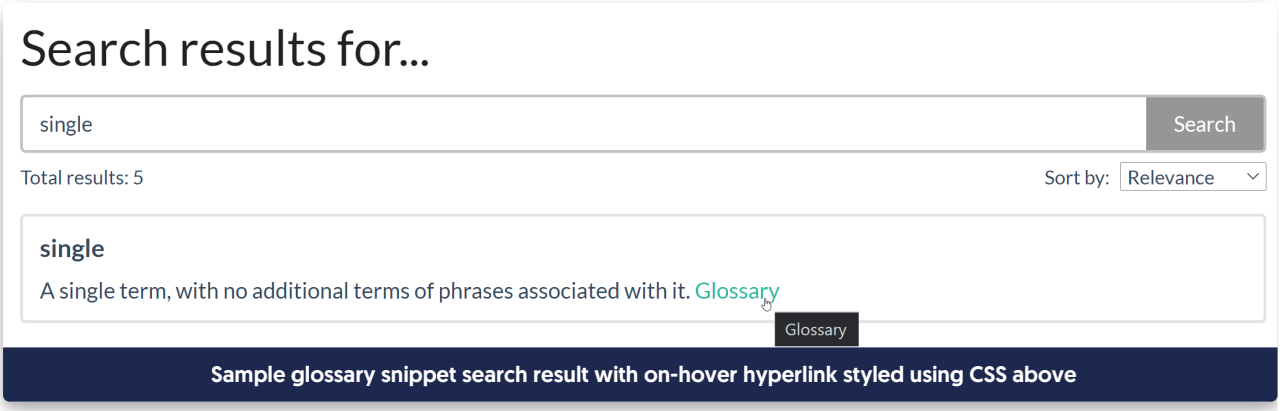
```
.hg-minimalist-theme a.ko-glossary-search-link:not(btn),
a.ko-glossary-search-link {
  color: #5C9AD1;
}
```



Sample glossary snippet search result with hyperlink styled using CSS above

And this CSS will change it to a blue-green color on-hover:

```
.hg-minimalist-theme a.ko-glossary-search-link:not(btn):hover,
a.ko-glossary-search-link:hover {
  color: #1abc9c;
}
```



Sample glossary snippet search result with on-hover hyperlink styled using CSS above

Add a print icon to the Glossary page

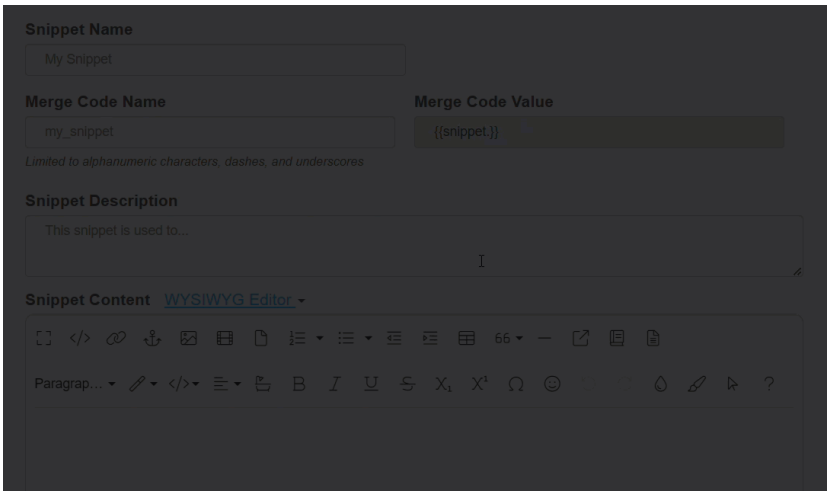
Last Modified on 08/28/2024 11:54 am EDT

By default, the Glossary page doesn't include PDF, email, or print icons. If you'd like to add a print icon to the Glossary page, you can do so using these steps.

Add a print icon like this to your Glossary page

Create a snippet to generate the print icon

1. Go to **Library > Snippets**.
2. Select **+ Create New Snippet**. If you're not familiar with creating snippets, refer to Creating a snippet.
3. Enter a **Snippet Name** like `Glossary Print`.
4. Enter a **Snippet Description**, like `Add a print icon to the Glossary page`.
5. Select the **Snippet Content** dropdown and select **Code Editor**.



6. Copy the code below and paste it into the code editor:

```
<script>
$(function(){
 if($('.hg-glossary-page') && $('.hg-glossary-page').length >= 1) {
   $('.page-header').append('<span class="ko-article-actions"><a href="#" class="ko-js-print" title="Print"><i cl
   };
});
</script>
```

7. Select **Create** to finish creating your snippet.

Add the snippet to Settings > Style

1. Copy the **Merge Code Value** of the snippet you created above.
2. Go to **Settings** > **Style**.
3. In the **Customize HTML, CSS, and JS** section, select **Custom HTML**.
4. Select **Body** from the **Select HTML section to edit** dropdown.
5. Paste your snippet merge code anywhere into the Body code editor pane (the bottom is always a good choice). For example:

```
<div class="row hg-site-body slideout-new"
   [template("layout")]
 {{snippet.backToTop}}
</div>
<div class="row ko-site-footer text-center xsize">
   <div>Copyright © 2023 – 2024 Your Company, LLC. All rights reserved.
      <br>Made with <a href="https://www.knowledgeowl.com" target="_blank">KnowledgeOwl</a> <img class
   </div>
</div>
{{snippet.glossaryPrint}}
```

6. Be sure to **Save** your changes.

Once you save those changes, the print icon appears on your glossary page:



Default Homepage HTML

Last Modified on 07/10/2024 1:32 pm EDT

This is the default HTML for Settings > Style > Custom HTML > Homepage. You can use it for reference or copy/paste it in and resave to return to the original default state.

For the default HTML for Knowledge Base > Homepage for older knowledge bases that use that HTML, see Default Homepage Article HTML.

```
<div class="ko-homepage-top">
 <h1 class="hg-article-title xcolor">[homepage("title")]</h1>
[template("large-search")]
</div>
<div class="hg-article">
 <div class="hg-article-body">
[homepage("body")]
 </div>
</div>
```

Default Body HTML

Last Modified on 05/29/2024 5:28 pm EDT

This is the default HTML for Settings > Style > Custom HTML > Body. You can use it for reference or copy/paste it in and resave to return to the original default state.

```
<div class="row hg-site-body slideout-new">
   [template("layout")]


</div>
<div class="row ko-site-footer text-center xsize">
   <div>Copyright © 2023 – 2024 Your Company, LLC. All rights reserved.
      <br>Made with <a href="https://www.knowledgeowl.com" target="_blank">KnowledgeOwl</a> <img class="ko-l
   </div>
</div>
```

Default Top Navigation HTML

Last Modified on 05/29/2024 5:28 pm EDT

This is the default HTML for Settings > Style > Custom HTML > Top Navigation. You can use it for reference or copy/paste it in and resave to return to the original default state.

```
<div class="navbar-header">
[template("slideout-left-toggle")]
<a class="navbar-brand" href="/[template("rootpath")]" alt="Logo" title="Your site">[template("project-logo")]</a>
<h1 class="hg-project-name">[template("project-name")]</h1>
<div class="nav-left-searchbar hidden-xs">
[template("searchbar")]
</div>
<button type="button" class="navbar-toggle toc-toggle pull-left clear-left" data-toggle="collapse" data-target=".docur
<span class="sr-only">Table of Contents</span>
<span class="browse">Table of Contents</span>
<span class="icon-bar"></span>
<span class="icon-bar"></span>
<span class="icon-bar"></span>
</button>
[template("slideout-right-toggle")]
<button type="button" class="navbar-toggle" data-toggle="collapse" data-target=".navbar-collapse">
<span class="sr-only">Toggle navigation</span>
<span class="icon-bar"></span>
<span class="icon-bar"></span>
<span class="icon-bar"></span>
</button>
</div>
<div class="navbar-collapse collapse" id="navbar-collapse">
[template("slideout-right-toggle")]
<ul class="nav navbar-nav navbar-right">
<li>[template("searchbar")]</li>
<li>[template("contact")]</li>
<li>[template("login")]</li>
</ul>
</div>
```

Default Article HTML

Last Modified on 05/29/2024 5:28 pm EDT

This is the default HTML for Settings > Style > Custom HTML > Article. You can use it for reference or copy/paste it in and resave to return to the original default state.

```
<div class="hg-article">
  <div class="hg-article-header">
    <h1 class="hg-article-title">[article("title")]
      <span class="ko-article-actions">
        <span class="pdf">[article("pdf_download_tool")]</span>
        <a href="#" class="ko-js-print">
          <i class="fa fa-print fa-fw"></i>
        </a>
        <script>
        function sendEmail() {
          var title = '[article("title")]'.replace("'", "\'").replace("&#039;", "\'");
          window.location = 'mailto:?subject=' + title + '&body=' + window.location;
          }
        </script>
        <a href="#" onclick="sendEmail()">
          <i class="fa fa-envelope-o fa-fw"></i>
        </a>
      </span>
    </h1>
    <div class="metadata">Last Modified on [article("date_modified")]</div>
  </div>
  <div class="hg-article-body">
    [article("body")]
  </div>
  <div class="hg-article-footer">
    <div class="ko-related-articles text-center">
      <h3>Related Articles</h3>
      [template("related")]
    </div>
    [template("rating")]
    [template("comments")]
  </div>
</div>
```

Default Article Version HTML

Last Modified on 05/29/2024 5:28 pm EDT

This is the default HTML for Settings > Style > Custom HTML > Article Version. You can use it for reference or copy/paste it in and resave to return to the original default state.

```
<div class="hg-article">
   <div class="hg-article-header">
      <h1 class="hg-article-title">[article("title")][article("action_icons")]</h1>
      <div class="version-metadata">
         <div class="version-number">[translation("article:version-number")] [article("version")]</div>
         <div class="version-author">[translation("article:version-author")] [article("version_author")]</div>
         <div class="version-creation-date">[translation("article:version-date-created")] [article("version_created")]</di
         <div class="version-activation-date">[translation("article:version-date-activated")] [article("version_activated")
         <div class="version-activation-author">[translation("article:version-activating-author")] [article("version_activa
         <div class="version-deactivation-date">[translation("article:version-date-deactivated")] [article("version_deacti
         <div class="version-deactivation-author">[translation("article:version-deactivating-author")] [article("version_d
      </div>
   </div>
   <div class="hg-article-body">
      [article("body")]
   </div>
   <div class="hg-article-footer">
      <div class="ko-related-articles text-center">
         <h3>[translation("article:related-articles-heading")]</h3>
         [template("related")]
      </div>
   </div>
</div>
```

Default Login HTML

Last Modified on 05/29/2024 5:28 pm EDT

This is the default HTML for Settings > Style > Custom HTML > Login Page. You can use it for reference or copy/paste it in and resave to return to the original default state.



This is the default html for the Login Page. Default HTML to add a login link back to your Top Navigation is in Default Top Navigation HTML.

```
<div class="container login-container">
 [template("login-page")]
</div>
```

Default Manage Reader Subscriptions HTML

Last Modified on 05/29/2024 5:28 pm EDT

This is the default HTML for Settings > Style > Custom HTML > Manage Reader Subscriptions. You can use it for reference or copy/paste it in and resave to return to the original default state.

```
<div class="container reader-subscriptions-container">

</div>
```

Default 404 Error Page HTML

Last Modified on 05/29/2024 5:28 pm EDT

This is the default HTML for Settings > Style > Custom HTML > 404 Error Page. You can use it for reference or copy/paste it in and resave to return to the original default state.

```
<div class="documentation-article">
  <div class="ko-content-cntr">
    <div class="hg-article">
      <div class="error-page-top text-center">
        <h1 class="top-marginless">Uh oh! We're sorry.</h1>
        <h2>We weren't able to find that page.</h2>
        <h3>Try a search or let us take you <a href="https://support.knowledgeowl.com/help">home</a>.</h3>
        [template("large-search")]
      </div>
      <div class="homepage-widgets">
        <div class="col-md-4">
          <h3>Popular Articles</h3>
          [template("pop-articles")]
        </div>
        <div class="col-md-4">
          <h3>Recently Updated Articles</h3>
          [template("up-articles")]
        </div>
        <div class="col-md-4">
          <h3>New Articles</h3>
          [template("new-articles")]
        </div>
      </div>
    </div>
  </div>
</div>
```

Default Restricted Access Page HTML

Last Modified on 05/29/2024 5:28 pm EDT

This is the default HTML for Settings > Style > Custom HTML > Login. You can use it for reference or copy/paste it in and resave to return to the original default state.

```
<div class="hg-site-login">
 <div class="alert alert-danger text-center">
 <h4><i class="fa fa-exclamation-triangle"></i> You do not have access to view this content.</h4>
 </div>
</div>
```

Default Right Column HTML

Last Modified on 05/29/2024 5:28 pm EDT

This is the default HTML for Settings > Style > Custom HTML > Right Column. You can use it for reference or copy/paste it in and resave to return to the original default state.

```
<div class="panel panel-default right-col-panel art-info-panel">
 <div class="panel-heading">About this Article</div>
 <ul class="list-unstyled stat-list">
 <li>Created: [article("date_created")]</li>
 <li>Last updated: [article("date_modified")]</li>
 <li class="hg-article-controls-right">
 <a href="#" class="js-print"><i class="fa fa-print fa-fw"></i></a>
 <a href="#">[article("pdf_download_tool")]</a>
 <a href="#" onclick="javascript:window.location='mailto:?subject=[article("title")]&body=' + window.location;"><i cla
 </li>
 </ul>
</div>
<div class="panel panel-default right-col-panel related-panel">
 <div class="panel-heading">Related Articles</div>
[template("related")]
</div>
<div class="panel panel-default right-col-panel feedback-panel">
 <div class="panel-heading">Was this article helpful? </div>
[template("rating")]
</div>
<div class="panel panel-default right-col-panel pop-panel">
 <div class="panel-heading">Most Popular</div>
[template("pop-articles")]
</div>
<div class="panel panel-default right-col-panel new-panel">
 <div class="panel-heading">Newest</div>
[template("new-articles")]
</div>
<div class="panel panel-default right-col-panel recent-panel">
 <div class="panel-heading">Recently Updated </div>
[template("up-articles")]
</div>
```

Default CSS

Last Modified on 05/29/2024 5:27 pm EDT

This is the default HTML for Settings > Style > Custom CSS. You can use it for reference or copy/paste it in and resave to return to the original default state.

```
/******************************************************** General structure ****************************/
/* smooth article resizing on TOC open/close */
.hg-minimalist-theme #ko-article-cntr {
  transition: all 300ms ease-in-out;
  width: 100%;
}
/* hide right col when TOC open */
.hg-minimalist-theme #ko-article-cntr.slideout-panel-left.open+.col-lg-3.visible-lg.right-column {
  opacity: 0;
  visibility: hidden;
}
/* size and position right column if in use */
.hg-minimalist-theme.hg-3column-layout .right-column {
  top: 65px;
  padding-right: 35px;
  z-index: 2;
  max-width: calc((100vw - 920px) / 2);
  transition: all 200ms ease-in-out;
  opacity: 1;
}
/* make sure footer is full width */
.hg-minimalist-theme.hg-3column-layout .ko-site-footer {
  width: 100%;
}
/* self clear page contents */
.documentation-body::after {
  content: "";
  display: table;
}
/* make site background white */
.hg-minimalist-theme .documentation-body {
  background: #ffffff;
}
.hg-site {
  background: #ffffff;
}

/******************************************************** Font overrides *************************/
/* color for h1 */
.hg-minimalist-theme .documentation-article h1 {
  color: #1d284f;
}
/* article content h2 size */
.documentation-article h2 {
  font-size: 28px;
}
/* article content h3 size */
.documentation-article h3 {
  font-size: 24px;
```

```
}
/* article content h4 size */
.documentation-article h4 {
  font-size: 18px;
}
/* default color of a text (links) */
.hg-minimalist-theme a:not(.btn),
a:not(.btn) {
  color: #3C80BA;
}
/* remove bottom margin from paragraphs in article content */
.documentation-article p {
  margin-bottom: 0;
}
/* force default font size for blockquote */
blockquote {
  font-size: inherit;
}
/* override default font size for home page search bar */
.hg-minimalist-theme .ko-large-search input.form-control {
  font-size: 15px;
}

/******************************************************* Topic Category styles *********************/
/* remove top border, bottom margin from title container */
.hg-minimalist-theme .topics-top-wrapper {
  border-bottom: none;
  margin-bottom: 0px;
}
/* remove border, add padding for topic articles */
.hg-minimalist-theme .topics-articles .hg-article-body,
.hg-minimalist-theme .hg-category-page .hg-article-body {
  border-bottom: none;
  padding-bottom: 40px;
}
/* remove padding between topic articles */
.hg-minimalist-theme .topics-articles .hg-article-body {
  padding-bottom: 0px;
}
/* topic aricle h2 size */
.documentation-article .topics-articles h2.hg-article-title {
  font-size: 24px;
}
/* topic aricle h3 size */
.documentation-article .topics-articles h3 {
  font-size: 18px;
}
/* topic aricle h4 size */
.documentation-article .topics-articles h4 {
  font-size: 16px;
}

/******************************************************* Default Category Styles *********************/
/* add top and bottom margin to category panels */
.hg-minimalist-theme .category-list {
  margin-bottom: 40px;
  margin-top: 40px;
}
/* remove bottom border from title */
.hg-minimalist-theme .faq-header {
  border-bottom: none;
}
/* remove right margin from category description */
.hg-minimalist-theme .faq-top-description {
```

```
  margin-right: 0;
}
/* change category panels into 2x2 grid */
.hg-minimalist-theme .faq-nav-content .category-list {
  display: grid;
  grid-template-columns: repeat(auto-fit, minmax(400px, 1fr));
  gap: 20px;
  grid-auto-rows: 1fr;
}
/* get rid of psuedo html elements */
.hg-minimalist-theme .faq-nav-content .category-list .clear-left,
.hg-minimalist-theme .faq-nav-content .category-list .clear-both {
  display: none !important;
}
/* style category panels */
.hg-minimalist-theme .faq-nav-content .faq-cat-container {
  margin-left: 0;
  margin-right: 0;
  width: auto;
  border: 1px solid #dcdcdc;
  border-radius: 4px;
  transition: all .2s ease-in-out;
  backface-visibility: hidden;
}
/* hover effect for category panels */
.hg-minimalist-theme .faq-nav-content .faq-cat-container:hover {
  background-color: #fff;
  box-shadow: 2px 4px 4px #aeaeae;
  transform: scale(1.01) translateZ(0);
}
/* add bottom margin to list of articles */
.hg-minimalist-theme .faq-nav-content {
  margin-bottom: 40px;
}
/* remove right margin from category title */
.hg-minimalist-theme .faq-header {
  margin-right: 0;
}
/* hide h2 Articles from default categories */
.hg-minimalist-theme .faq-nav-content h2 {
  display: none;
}
/* Force main area to be full width */
.hg-minimalist-theme .hg-category-page .category-list .col-md-6.col-lg-4 {
  width: 100% !important;
}
/* adjust position of subscribe button */
.hg-minimalist-theme .ko-cat-sub-cntr {
  margin-top: 12px;
  margin-right: 0;
}
/* apply hover effects to subscribe button */
.hg-minimalist-theme .btn.btn-default.ko-cat-sub {
  border: 1px solid #b3b3b3;
  transition: all .1s ease-in-out;
  backface-visibility: hidden;
}
.hg-minimalist-theme .btn.btn-default.ko-cat-sub:hover {
  box-shadow: 1px 2px 2px #aeaeae;
  transform: scale(1.01) translateZ(0);
}
/* subcategory panel display tweaks */
.hg-minimalist-theme .faq-nav-content .faq-cat-panel-container {
  padding: 0;
```

```
}
.hg-minimalist-theme .faq-nav-content .faq-cat-panel {
  border: none;
  box-shadow: none;
  border-radius: 4px;
}
/* subcategory content-list display tweaks */
.hg-minimalist-theme .category-list.faq-content-list {
  margin-bottom: 0;
}
.hg-minimalist-theme .faq-content-list-container {
  width: auto;
  padding: 0;
}
.hg-minimalist-theme .faq-content-list-container .category-header {
  border-bottom: none;
  margin-bottom: 10px;
}
.hg-minimalist-theme .faq-nav-content .article-block div {
  margin-left: 0;
}

/******************************************************** Table of Contents **********/
/* add border and box-shadow to TOC */
.hg-minimalist-theme.hg-2column-layout .slideout-menu {
  display: block;
  padding: 0;
  box-shadow: none;
  border: 1px solid #ddd;
  border-radius: 0 4px 0 0;
  background-color: #F8F4F1;
  left: -360px;
  transition: all 300ms ease-in-out;
}
/* remove TOC padding */
.hg-minimalist-theme .hg-site-body .documentation-outter-list {
  padding: 0;
}
/* style top level content */
.hg-minimalist-theme .documentation-categories li.level-0,
.hg-minimalist-theme .documentation-outter-list > .article-container {
  border-bottom: 0;
  padding: 0;
  margin-right: 0;
  margin-top: 0;
  margin-bottom: 0;
}
/* style child content containers */
.hg-minimalist-theme .documentation-categories li {
  margin-right: 5px;
  margin-top: 5px;
  margin-bottom: 5px;
}
.hg-minimalist-theme .documentation-categories li.level-0 > .category-link-container,
.hg-minimalist-theme .documentation-outter-list > .article-container {
  padding: 5px 10px;
}
/* style top level articles */
.hg-minimalist-theme .documentation-outter-list > .article-container .article-link {
  padding: 0 5px;
  line-height: 33px;
}
/* background color for active and hovered child content */
.hg-minimalist-theme .documentation-categories li.active,
```

```
.hg-minimalist-theme .category-link-container.active,
.hg-minimalist-theme .documentation-categories .article-container:hover,
.hg-minimalist-theme .documentation-categories li a:hover,
.hg-minimalist-theme .category-link-container:hover {
  background-color: #e8e8e8;
}
/* background color for active and hovered top level content */
.hg-minimalist-theme .level-0 > .category-link-container:hover,
.hg-minimalist-theme .level-0 > .category-link-container.active,
.hg-minimalist-theme .documentation-outter-list > .article-container:hover,
.hg-minimalist-theme .documentation-outter-list > .article-container.active,
.hg-minimalist-theme .documentation-outter-list > .article-container .article-link:hover,
.hg-minimalist-theme .documentation-outter-list > .article-container .article-link.active {
  background-color: #f2e9e3;
  border-radius: 0;
}
.hg-minimalist-theme .documentation-categories .level-0 > .category-link-container a:hover {
  background-color: #f2e9e3;
}
/* override default toc slideout behavior */
.hg-minimalist-theme #ko-article-cntr.slideout-panel.open {
  transform: translateX(360px);
  width: calc(100% - 360px);
}
/* Change TOC chevron-right to plus-square */
.hg-minimalist-theme .documentation-categories .fa-chevron-right:before {
  content: "\f0fe" !important;
}
/* Change TOC chevron-down to minus-square */
.hg-minimalist-theme .documentation-categories .fa-chevron-down:before {
  content: "\f146" !important;
}
/* make icons slightly larger */
.hg-minimalist-theme .cat-icon, .hg-minimalist-theme .home-icon, .hg-minimalist-theme .alt-icon {
  padding: 8px 0 0 6px;
  font-size: 18px;
}
/* override default box shadow when side TOC is open */
.hg-minimalist-theme .documentation-categories.slideout-menu.open {
  box-shadow: 2px 4px 4px #aeaeae;
  left: 0;
}

/********************************************************** Modals ********************/
/* adjust input border width in modals */
.hg-minimalist-theme .modal .form-control {
  border-width: 1px;
}

/********************************************************** PDF Adjustments ***********/
/* hide .pdf-header outside of actual PDFs */
.hg-minimalist-theme .pdf-header {
  display: none;
}
/* show .pdf-header in actual PDFs */
.hg-minimalist-theme .hg-pdf .pdf-header {
  display: block;
}
/* height of image in .pdf-header */
.hg-minimalist-theme .hg-pdf .pdf-header img {
  height: 80px;
}

/********************************************************** Home Page Top and General */
```

```
/* get rid of background banner and add some padding to top of home page */
.hg-minimalist-theme .ko-homepage-top {
  background: none;
  padding-top: 2em;
  padding-bottom: 0em;
}
/* make sure category title is clickable */
.hg-minimalist-theme .hg-home-page .category-header {
  z-index: 2;
}
/* change default color for home page title */
.hg-minimalist-theme .ko-homepage-top .hg-article-title {
  color: #1d284f;
}

/****************************************************** Content Lists */
/* tweak padding and line heights */
.hg-minimalist-theme .stat-list {
  line-height: 1.3;
  font-size: 14px;
  margin-left: 1px;
}
.hg-minimalist-theme .stat-list li {
  padding: 4px 0;
}
/* remove bottom border from page title */
.hg-minimalist-theme .page-header {
  border-bottom: none;
}
/* remove border above "see more..." */
.hg-minimalist-theme .list-action {
  border-top: none;
}
/* correct margin and padding for content lists on homepage */
.hg-minimalist-theme .homepage-widgets {
  margin: 2em -15px;
}
.hg-minimalist-theme .homepage-widgets .col-md-4.col-sm-6 {
  padding-left: 15px;
}

/****************************************************** Search Bar */
/* remove border from individual search bar elements */
.hg-minimalist-theme .hg-search-bar input.form-control,
.hg-minimalist-theme .input-group-btn .btn,
.hg-minimalist-theme .input-group-btn .btn:hover,
.hg-minimalist-theme .hg-search-bar input.form-control:focus,
.hg-minimalist-theme .input-group-btn .btn:focus,
.hg-minimalist-theme .input-group-btn .btn-default.dropdown-toggle:active,
.hg-minimalist-theme .input-group-btn .btn-default.dropdown-toggle:focus {
  border: none;
}
/* add border to outer search bar */
.hg-minimalist-theme .hg-search-bar .input-group {
  border: 1px solid #E6E6E6;
  border-radius: 4px;
  transition: border .25s linear,color .25s linear,background-color .25s linear;
}
/* change border color on focus/active */
.hg-minimalist-theme .hg-search-bar .input-group:active,
.hg-minimalist-theme .hg-search-bar .input-group:focus,
.hg-minimalist-theme .hg-search-bar .input-group:focus-within {
  border: 1px solid #f8b88b;
}
```

```
}
/* remove background color from search button */
.hg-minimalist-theme .input-group-btn .btn {
  background: none;
}
/* adjust color and sizing for the refine button */
.hg-minimalist-theme .input-group-btn .btn-default.dropdown-toggle {
  color: #1d284f;
  font-size: 16px;
  border: none;
}
/* restyle the dropdown caret */
.hg-search-bar .category-dropdown .dropdown-toggle .caret {
  border: none;
  display: inline;
  font-family: 'Font Awesome 6 Pro';
  font-weight: 300;
  font-size: 14px;
}
.hg-search-bar .category-dropdown .dropdown-toggle .caret::before {
  content: "\f0d7";
}
/* change font color and remove border for search button */
.hg-minimalist-theme span.input-group-btn .btn-default,
.hg-minimalist-theme span.input-group-btn .btn-default:hover {
  color: #E6E6E6;
  border-left: none;
}
.hg-minimalist-theme .ko-large-search input.form-control,
.hg-minimalist-theme .hg-search-bar input.form-control {
  border-right: none;
}
/* add box-shadow to search bar */
.hg-minimalist-theme .input-group {
  box-shadow: 0px 2px 20px rgba(0, 0, 0, 0.05);
}
/* remove box shadow from type-ahead suggestion box */
.hg-minimalist-theme .navbar-collapse.in .input-group,
.hg-minimalist-theme .navbar-collapse.collapsing .input-group {
  box-shadow: none;
}
/* handle styles for showing/hiding type-ahead suggestion box */
.hg-minimalist-theme #navbar-collapse.in,
.hg-minimalist-theme #navbar-collapse.collapsing {
  margin-bottom: 0;
  padding: 10px;
  border-radius: 0px 0px 4px 4px;
  box-shadow: 0px 10px 20px -8px #ccc;
}

/*************************************************** Search Pages */
/* adjust bottom spacing page titles and containers */
.hg-minimalist-theme .recommended-container h2,
.hg-minimalist-theme .hg-contact-form-container h2,
.hg-minimalist-theme .hg-article-search {
  margin-bottom: 40px;
}
/* add bottom margin to search controls */
.hg-minimalist-theme .ko-srch-meta-cntr {
  margin-bottom: 20px;
}
/* add more top margin to full search results */
.hg-minimalist-theme #homepage-search-form .hg-article-search {
  margin-top: 20px;
}
```

```
}
/* remove bottom spacing from recommended article titles */
.hg-minimalist-theme .hg-article-search h4 {
  margin-bottom: 0;
}
/* increase space between article results */
.hg-minimalist-theme .hg-article-search li {
  margin-bottom: 25px;
}
/* adjust size/spacing of article meta data */
.hg-minimalist-theme .hg-article-info {
  font-size: 12px;
  margin-bottom: 5px;
}
/* add spacing after article blurbs */
.hg-minimalist-theme .hg-article-blurb {
  margin-bottom: 25px;
}
/* make last modified text for recommended articles smaller */
.hg-minimalist-theme .hg-article-search .hg-date {
  font-size: 14px;
}
/* adjust font size and line height for contact form labels */
.hg-minimalist-theme .hg-contact-form-container label {
  font-size: 18px;
  line-height: 1.3;
}
/* decrease width of contact form field borders */
.hg-minimalist-theme .hg-contact-form-container .form-control {
  border: 1px solid #bdc3c7;
}
/* update colors for the results paging buttons */
.hg-minimalist-theme .ko-search-pager li.current {
  background: #1d284f;
}
.hg-minimalist-theme div.ko-search-pager .pull-left:not(.current) a:not(.btn) {
  color: #1d284f;
}
.hg-minimalist-theme div.ko-search-pager .pull-left:not(.current) a:not(.btn):hover {
  color: #f8b88b;
}

/******************************************************** Tables *************************************/
/* adjust table header cell styles */
.table-bordered > thead > tr > th {
  background-color: #1d284f;
  color: #ffffff;
  padding-left: 1em;
}
/* give left aligned cells some left padding */
.table-bordered>tbody>tr>td,
.table-bordered>tfoot>tr>td,
table.table-bordered tr td[style*="text-align: left"] {
  padding-left: 1em;
}

/******************************************************** Article HTML *************************************/
/* add some padding to line items */
.hg-article-body ol li {
  padding: 10px 0;
}
/* first level - use regular numeric decimals  */
.hg-article-body ol {
  list-style-type: decimal;
```

```
}
/* second level - use lowercase alphabetic */
.hg-article-body ol > li > ol {
  list-style-type: lower-alpha;
}
/* third level - use lowercase Roman numerals */
.hg-article-body ol > li > ol > li > ol {
  list-style-type: lower-roman;
}
/* optional .article-block styles */
.article-block div {
  margin-left: 20px;
  font-size: 15px;
  line-height: 1.2;
}
/* default margin for p in lists */
.hg-article-body ul p,
.hg-article-body ol p {
  margin: 20px 0 0;
}
/* give more top space to article ratings */
.hg-minimalist-theme .hg-ratings {
  margin-top: 15px;
}
/* space out the article rating thumbs */
.hg-minimalist-theme .hg-ratings .hg-helpful {
  margin-right: 20px;
}
/* styles for check-list bullet points */
ul.check-list {
  list-style: none;
  padding-left: 0;
}
ul.check-list li {
  position: relative;
  padding-left: 1.5em;
}
ul.check-list li:before {
  font-family: 'FontAwesome';
  content: "\f00c" !important;
  padding-right: 0.5em;
  font-size: smaller;
  color: green;
}
/* remove top border from comment form */
.hg-minimalist-theme #hg-comment-form {
  border-top: none;
}

/******************************************************** List pages ***********/
/* remove top border from glossary page */
.hg-minimalist-theme .glossary-letter ~ .glossary-letter {
  border-top: none;
}
/* left align article lists */
.hg-minimalist-theme .hg-widget-page .ko-content-cntr ol {
  padding-inline-start: 20px;
}

/******************************************************** Alert boxes **********/
/* give alerts, wells, pre some top margin */
.alert, .well, pre {
  margin-top: 20px;
}
```

```
/* icon styling for all alerts */
.alert::before {
  display: block;
  width: 65px;
  height: 60px;
  float: left;
  margin-top: 0px;
  font-size: 48px;
  font-weight: 900;
  font-family: 'Font Awesome 6 Pro';
  -moz-osx-font-smoothing: grayscale;
  font-style: normal;
  font-variant: normal;
  line-height: 60px;
  text-rendering: auto;
}
/* danger alert styling */
.alert.alert-danger {
  background: #F4E2E2;
  border: 1px solid #E6ADA9;
}
.alert.alert-danger:before {
  content: "\f071";
  color: #f8918b;
}
/* info alert styling */
.alert.alert-info {
  background: #F0F7FD;
  border: 1px solid #69B2F0;
}
.alert.alert-info:before {
  content: "\f05a";
  color: #97c4ed;
}
/* success alert styling */
.alert.alert-success {
  background: #F8FBF9;
  border: 1px solid #BDDCBC;
}
.alert.alert-success:before {
  content: "\f058";
  color: #9bdbae;
}
/* warning alert styling */
.alert.alert-warning {
  background: #FDF9E6;
  border: 1px solid #FBD9A4;
}
.alert.alert-warning:before {
  content: "\f8fa";
  color: #ffcc7a;
}
/* remove top margin from p tags in alerts */
.alert.alert-info p,
.alert.alert-success p,
.alert.alert-warning p,
.well p {
  margin-top: 0;
}
/* make sure there is vertical room icons in alerts */
.alert.alert-info,
.alert.alert-success,
.alert.alert-danger,
.alert.alert-warning {
```

```
  min-height: 90px;
}
/* Offset lists that are within alert divs */
.alert ul,
.alert ol {
  margin-left: 75px;
}

/********************************************************************************** Image Captions *****/
/* Set dark background for captions */
.hg-minimalist-theme .documentation-article .fr-img-caption .fr-img-wrap>span {
  background: #1d284f;
}
/* Remove border for image captions */
.hg-minimalist-theme .documentation-article span.fr-img-caption {
  border: none;
}
/* Fix hyperlinks in image captions, now that we have the dark background */
.hg-minimalist-theme span.fr-inner a {
  color: #F6A267;
  text-decoration: none;
}
/* Image caption hyperlinks should be a different color and underlined on-hover */
.hg-minimalist-theme .fr-inner a:hover {
  color: #F8B88B;
  text-decoration: underline;
}

/********************************************** Back to top snippet styling */
/* basic styles */
.back-to-top {
  background-color: #fff;
  margin: 0;
  position: fixed;
  bottom: 100px;
  right: 45px;
  width: 55px;
  height: 45px;
  z-index: 100;
  text-decoration: none;
  text-align: center;
  border-radius: 4px;
  border: 1px solid #acacac;
  box-shadow: 1px 3px 3px #aeaeae;
  visibility: hidden;
  opacity: 0;
  transition: all .2s ease-in-out;
}
/* make visible when scrolled down on page */
.back-to-top.visible {
  visibility: visible;
  opacity: 1;
}
/* icon styles */
.back-to-top i {
  font-size: 45px;
  color: #3a3a3a;
}
/* mouse effect styles */
.back-to-top:hover,
.back-to-top:active,
.back-to-top:focus {
  color: #ffffff;
}
```

```
/****************************************** Miscellaneous */
/* optional .margin-top-20 class */
.hg-minimalist-theme .margin-top-20 {
  margin-top: 20px;
}
/* panels within the right column */
.hg-minimalist-theme .right-col-panel {
  border-radius: 4px;
}
.hg-minimalist-theme .right-col-panel .panel-heading {
  color: #fff;
  background: #1d284f;
  border-radius: 4px 4px 0 0;
}
/* Add styles for in article TOC snippet to work*/
.hg-minimalist-theme .toc-top {
  background-color: #f5f5f5;
  border: 1px solid #e3e3e3;
  border-radius: 4px;
  box-shadow: 0 1px 1px rgba(0, 0, 0, 0.05) inset;
  margin-bottom: 20px;
  min-height: 20px;
  padding: 5px 30px;
}
/* In article TOC snippet style */
.hg-minimalist-theme .toc-anchor {
  display: block;
  height: 140px;
  margin-top: -140px;
  visibility: hidden;
}
/* remove bottom border for articles */
.hg-minimalist-theme .hg-article-body {
  border-bottom: none;
}
.ko-content-cntr .pager {
  margin-top: 40px;
}

/****************************************************************** 404 page *********************/
/* remove top border */
.hg-minimalist-theme .error-page-top {
  border: none;
}

/****************************************************************** No access page ****************/
/* vertically center h4 */
.hg-site-login .alert h4 {
  margin-top: 10px;
}
/* remove duplicate icon */
.hg-site-login .alert h4 i {
  display: none;
}

/****************************************************************** Screen size specific adjustments ***************/
/* will apply to screen widths narrower than 1474px */
@media (max-width: 1473px) {
  /* shrink main content area */
  .hg-minimalist-theme.hg-3column-layout:not(.hg-home-page) .ko-content-cntr {
    max-width: 700px;
  }
  /* expand right col size */
```

```
  .hg-minimalist-theme.hg-3column-layout .right-column {
    max-width: calc((100vw - 720px) / 2);
  }
}
/* will apply to screen widths narrower than 992px */
@media (max-width: 991px) {
  .hg-minimalist-theme #ko-article-cntr.slideout-panel.open {
    width: 100%;
  }
}
/* will apply to screen widths wider than 575px, not narrower */
@media (min-width: 576px) {
  .hg-minimalist-theme .hg-home-page .category-list>div {
    width: 50%;
    float: left;
  }
  .hg-minimalist-theme .category-img {
    max-width: 50%;
  }
}
/* will apply to screen widths wider than 767px */
@media(min-width:768px) {
  .hg-minimalist-theme .lead,
  .hg-minimalist-theme .lead p {
    font-size: 30.01px !important
  }
}
/* will apply to screen widths wider than 991px */
@media (min-width: 992px) {
  .hg-minimalist-theme .hg-home-page .category-list>div {
    width: 25%;
  }
  .hg-minimalist-theme .category-img {
    max-width: 50%;
  }
}
```

Default Homepage Article HTML (deprecated)

Last Modified on 07/10/2024 1:34 pm EDT

This is the default HTML for the top-level Homepage content editor, used as the default for knowledge bases created before 14 December 2022. You can use it for reference or copy/paste it in and resave to return to the original default state.

For the default HTML in Settings > Style > Custom HTML > Homepage, refer to Default Homepage HTML.



Only for older knowledge bases
This default HTML was used in knowledge bases created before 14 December 2022. New knowledge bases created after that date do not use Homepage and instead store all their HTML in Settings > Style > Custom HTML > Homepage. Only use the HTML below if you're restoring the theme on an older knowledge base.

```
<div>[template("icon-cats")]</div>
<div class="homepage-widgets">
<div class="col-md-4 col-sm-6">
   <h3>Popular Articles</h3>
   [template("pop-articles")]</div>
<div class="col-md-4 col-sm-6">
   <h3>New Articles</h3>
   [template("new-articles")]</div>
<div class="visible-sm clear-both"></div>
<div class="col-md-4 col-sm-6">
   <h3>Updated Articles</h3>
   [template("up-articles")]</div>
</div>
```

What are merge codes?

Last Modified on 05/29/2024 5:27 pm EDT

Merge codes act as placeholders for content. KnowledgeOwl replaces the merge code with the appropriate content when it builds the page. They are mainly used when creating custom layouts, look and feel. They can also allow you to create dynamic content.

Example one: creating custom layouts

When creating a custom article layout, adding the [article("**title**")] merge code results in KnowledgeOwl displaying the article title at that point in the document.

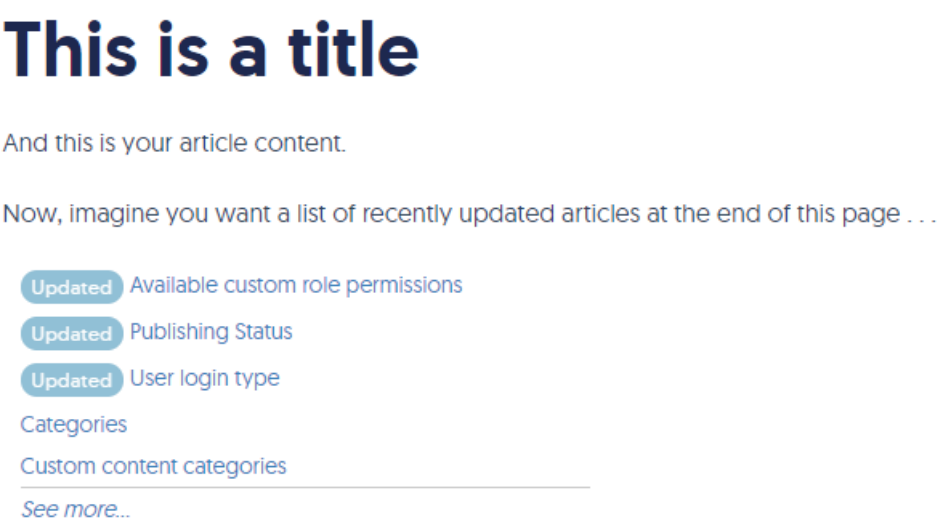
Example two: adding pieces of functionality

There are also merge codes that add larger pieces of functionality. For example, [template("**up-articles**")] causes KnowledgeOwl to display a list of recently updated articles.

Using this HTML:

```
<h1>This is a title</h1>
<p>And this is your article content.</p>
<p>Now, imagine you want a list of recently updated articles at the end of this page . . . </p>
[template("up-articles")]
```

Results in this:



KB Merge Codes

Last Modified on 05/29/2024 5:28 pm EDT

Here are the available template merge codes in the KB merge codes list, which you can use in any of the **Settings > Style, Custom HTML** templates. Many can also be used directly within individual articles, categories, and subcategories.

Template Merge Code	Description	Example
[template("**article-tags**")]	Creates a Tags: [hyperlinked tags] list for an article or category wherever it's used. The "Tags:" test is controlled by a setting in the Customize Text tool.	Tags: search subscription
[template("**article-tag-names**")]	Creates a comma-separated list of the article tag names associated with a given article or category.	tag1,tag2,tag3,search,subscription
[template("**project-logo**")]	Inserts the knowledge base logo set in **Settings > Style**. Used in the Default Top Navigation HTML	
[template("**project-name**")]	Inserts the knowledge base's name, as set in **Settings > Basic**. Used in the Default Top Navigation HTML.	
[template("**contact**")]	Adds the link to Contact Form. Should be added somewhere in your knowledge base if you're using the Contact Form.	
[template("**glossary**")]	Creates a link to the Glossary page.	

Article Merge Codes

Last Modified on 05/29/2024 5:27 pm EDT

Here are the available template merge codes for use in **Settings > Style, Custom HTML > Article.** Many can also be used directly within individual articles, categories, and subcategories.

Template Merge Code	Description	Example
[article("body")]	The "body" merge code will display the contents of the current category or article.	This merge code only works in **Custom HTML > A** does not work inside articles. If it did, it would cr infinite loop of loading content inside of conte might be fun to see, but it would break Knowlec horribly.
[article("title")]	The "title" merge code will display the category or article title.	Article Merge Codes
[article("toc_title")]	The "toc_title" merge code will display the Table of Contents Title (if set).	Article
[article("pdf_download_tool")]	The "pdf_download_tool" merge code will display a PDF icon that will download the contents of the current category or article when clicked.	
[article("version")]	The "version" merge code will display the version number of the current active version.	2024.04.11
[article("url")]	The "url" merge code will display the full URL to the article.	https://support.knowledgeowl.com/help/art merge-codes
[article("date_created")]	The "date_created" merge code will display the date and time the current category or article was created.	07/12/2015 2:24 pm EDT
[article("date_modified")]	The "date_modified" merge code will display the date and time the current category or article was last modified.	05/29/2024 5:27 pm EDT
[article("date_published")]	If an article has an explicit Published Date set, the "date_published" merge code will display that date.	07/12/2015
[article("last_modified_by")]	The "last_modified_by" merge code displays the name of the author who most recently saved changes to this article.	Kate Mueller
[article("thumbnail")]	The "thumbnail" merge code displays a thumbnail image, if one is set in the article editor.	
[article("banner")]	The "banner" merge codes displays a banner image, if one is set in the article editor.	
[article("category")]	The "category" merge code displays the ID of the article's immediate parent category.	59a4a799ad121cd61e410479
[article("parent_ids")]	The "parent_ids" merge code displays a comma-separated list of the article's parent categories as they appear in the breadcrumbs.	5db75805ad121c7361e3c5bd,59a4a799ad121cd61
[article("action_icons")]	The "action_icons" merge code displays the various article action icons next to the article's title (PDF, print, email, and favorites if Favorites have been enabled). This merge code replaces older hard-coded HTML.	See icons at the top of this page next to the arti :)

[article["favorites_action"]]	The "favorites_action" merge code displays the favorites icon (a star), if Favorites are enabled in the knowledge base.	See How favorites work for sample screenshot Change the favorites star icon for updating to a c icon.
[article["required_reading_flag"]]	The "required_reading_flag" merge code displays the "this article is required to read" statement for use with Required Reading.	See Required Reading overview for sample scre
[article["required_reading_acknowledgement"]]	The "required_reading_acknowledgement" merge code displays the acknowledgement section for use with Required Reading.	See Required Reading overview for sample scre
[template["rating"]]	The "rating" merge code displays the rating text and controls as set up in Settings > Article Ratings.	
[template["comments"]]	The "comments" merge code displays the leave a comment options as set up in Settings > Comments.	

Homepage Merge Codes

Last Modified on 07/10/2024 1:58 pm EDT

Here are the available template merge codes for use in **Settings > Style > Custom HTML > Homepage.** These merge codes will only work in the knowledge base homepage; they will not work inside categories or articles.

Homepage Merge Code	Description	Example
[homepage("title")]	The "title" merge code will display whatever text you have in the **Title** field under **Homepage > Homepage content.** You can change the title there.	NA - will not work in articles
[homepage("body")]	The "body" merge code will display the content inside the **Custom content** field of the **Homepage** content editor in the left navigation. You can update the content here.	NA - will not work in articles

Reader Merge Codes

Last Modified on 08/21/2024 11:25 am EDT

Here are the available template merge codes for use in any of the following locations:

- **Settings > Style**
- **Homepage**
- **Knowledge Base > Articles**
- **Knowledge Base > Contact Form**

Template Merge Code	Description
[reader("id")]	The "id" merge code will display the current reader's ID (which you can see in the UI if you open the reader's details--the ID is the final portion of the URL).
[reader("username")]	The "username" merge code will display the current reader's username / login. This will work with both readers and authors.
[reader("first-name")]	The "first-name" merge code will display the current reader's first name.
[reader("last-name")]	The "last-name" merge code will display the current reader's last name.
[reader("full-name")]	The "full-name" merge code will display the current reader's first and last name.
[reader("groups")]	The "groups" merge code will display a comma-separated list of the current reader's groups.
[reader("ssoid")]	The "ssoid" merge code will display the current reader's SSOID. Only shows anything for readers logging in through Single Sign-On.
[reader("custom1")]	The "custom1" merge code will display whatever is specified in the Custom 1 field for any given reader.
[reader("custom2")]	The "custom2" merge code will display whatever is specified in the Custom 2 field for any given reader.
[reader("custom3")]	The "custom3" merge code will display whatever is specified in the Custom 3 field for any given reader.
[reader("custom4")]	The "custom4" merge code will display whatever is specified in the Custom 4 field for any given reader.
[reader("custom5")]	The "custom5" merge code will display whatever is specified in the Custom 5 field for any given reader.

Body Merge Codes

Last Modified on 08/21/2024 2:02 pm EDT

Here are the available template merge codes for use in **Settings > Style > Custom HTML > Body.** All merge codes except "contents" will also work inside articles.

Template Merge Code	Description	Example
[template("project-logo")]	The "project-logo" merge code will display whatever image you have uploaded under **Settings > Style > Logo**. You can change the logo there or by replacing the original file in your library.	
[template("project-name")]	The "project-name" merge code will display the knowledge base name from **Settings > Basic**.	
[template("contact")]	The "contact" merge code will display a "Contact Us" link to your contact form if you have this feature enabled. You can enable your contact form under Knowledge Base > Contact Form. You can also customize your contact form link or add it to the table of contents.	
[template("searchbar")]	The "searchbar" merge code will display a search bar with the text "Search for articles".	
[template("contents")]	The "contents" merge code will display the contents of the current page whether that is the homepage, the contact form, or an article.	This merge code does not work inside articles. If it did, it would create an infinite loop of loading content inside of content. It might be fun to see, but it would break KnowledgeOwl horribly.
[template("is-editor-check")]	Checks if the current viewer is an author. Returns a "true" value if the viewer is an author and a "false" value if they are not.	true

PDF Merge Codes

Last Modified on 05/29/2024 5:28 pm EDT

We have several merge codes that can be used in the Standard, Custom, and Individual Article PDFs:

PDF Merge Code	Description	Applies to
[pdf("page-number")]	This will automatically add a page number to the PDFs. We recommend using this in either the header or footer.	Individual Article PDFs Standard PDF Custom PDF
[pdf("cover-title")]	This will add the text from the **Table of Contents Title** for Standard and Custom PDFs. Cannot be used in Settings > PDF for Individual Article PDFs.	Standard PDF Custom PDF
[pdf("date-created")]	This will add the date the PDF was created. It can be used in the header, footer, or on a cover page. Cannot be used in Individual Article PDFs.	Standard PDF Custom PDF

Custom content category merge codes

Last Modified on 05/29/2024 5:28 pm EDT

These merge codes can be used in Custom content categories to display subcategories.

Template Merge Code	Description
[template("content-list")]	The template content-list merge code will display subcategories in content list format.
[template("panel-list")]	The template panel-list merge code will display subcategories in subcategory panel format.
[template("icon-cats")]	The template icon-cats merge code will display subcategories in the icon panel format. See Add category icons to your homepage category panels for additional options of working with this merge code.

Other merge codes

Last Modified on 05/29/2024 5:28 pm EDT

These merge codes can be used in Custom HTML but also in individual articles, categories, etc. See usage notes:

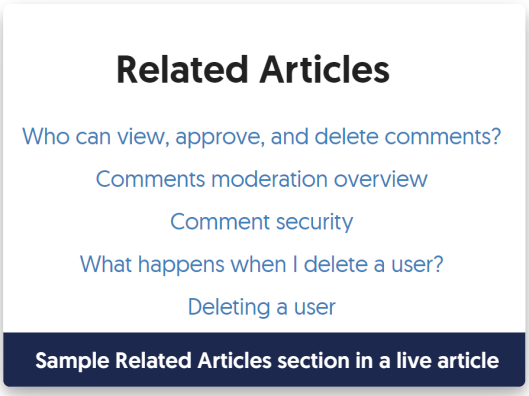
Template Merge Code	Description	Usage
[template("object-id")]	The "object-id" merge code can be used in articles and categories and will pull the ID of that article or category. Generally this is most useful in API snippets or for advanced logic that depends on a particular ID being present.	Can be used in Custom HTML > Article and in individual articles and categories. Adding it to other pages will cause a silent failure. Doesn't work in snippets.

How Related Articles work

Last Modified on 05/29/2024 5:28 pm EDT

The Related Articles feature allows you to present a list of "related" articles, topic display categories, and custom content categories to any article or category in your knowledge base.

This can help your readers find other relevant content if the content they're viewing didn't quite answer their questions or encourage them to browse to other content.



Sample Related Articles section in a live article

There are three basic ways you can use Related Articles:

- Use automatic recommendations only
- Use manual recommendations only
- Use a combination of manual + automatic

Where do Related Articles show up?

Last Modified on 05/29/2024 5:28 pm EDT

The display varies slightly based on what type of content you're looking at:

- For articles, the Related Articles section will display by default in the article footer. (You can see ours at the bottom of the page, which is the default display.)
- For topic display categories, the Related Articles section displays at the bottom of the category, after all the articles. No related articles for individual articles within the category are shown.
- For custom content categories, the Related Articles section displays at the bottom of the category, after any content.
- While you can add Related Articles to Default categories and Blog style categories, the section will never display in these category types.

If you're customizing your knowledge base theme, you may want to change where the Related Articles section displays, remove it entirely, or only display it within specific articles.

You can remove the `[template("related")]` merge code from **Settings > Style > Custom HTML > Article** and add it various other places to customize your theme.

If you want to remove it globally but only display it in particular articles, see Display Related Articles only in specific articles.

Do deleted or archived articles show in Related Articles?

Last Modified on 05/29/2024 5:28 pm EDT

When you delete, archive, or switch an article back to draft status (or delete a category) and it was listed as a Related Article somewhere:

- The article or category will still appear in the Related Articles section of the editor for any content where it was added.
- The article or category will NOT display in the live knowledge base when a reader views this article or category.

We know this can be a bit confusing, but we do this on purpose:

This way, if you end up recovering or republishing the article, you don't have to redo those related article relationships.

And if you know that the article will never be recovered or republished, you can manually remove it as a Related Article in the editor.

Use automatic Related Articles

Last Modified on 05/29/2024 5:28 pm EDT

By default, all new knowledge bases come with automatic Related Article suggestions enabled in **Settings > Basic > Website Settings**.

When you use this option, behind the scenes, KnowledgeOwl searches and displays **up to ten** articles, topic display categories, or custom content categories that have content related to the content you're looking at using the article titles as a match.

Using automatic Related Articles has several advantages:

- You don't need to do any work to show them, so it can be a way to quickly populate resources on a lot of existing content
- You can still use them in combination with manual Related Articles, so you can slowly transition over to manual

You can configure these automatic suggestions in a few ways:

1. You can enable/disable automatic suggestions completely. See Enable automatically suggested Related Articles if you've previously disabled it; see Disable automatic suggestions for Related Articles if you'd like to turn it off completely.
2. You can decide to only suggest articles that are within the same top-level category as the currently-viewed article.
3. You can backward suggest Related Articles.
4. You can change the number of automatically displayed related articles, anywhere from 1-10.

See Enable automatically suggested Related Articles for more information on the last three options.

Manually suggest Related Articles

Last Modified on 05/29/2024 5:28 pm EDT

Whether you use automatic Related Articles or not, you can always manually add Related Articles to your content.

Unlike automatic Related Article suggestions, you aren't limited to 10 manually suggested Related Articles. Add as many as you like! (Though more than 10 would probably get overwhelming...)

You can add:

- Articles
- Topic display categories
- Custom content categories

See Add related articles for detailed instructions on adding these Related Articles!

Use both manual and automatic Related Articles

Last Modified on 05/29/2024 5:28 pm EDT

If you use automatically suggested articles and add some related articles manually, the knowledge base will always try to display the number of articles you've specified. Let's say you've kept it at the default (5):

- When you have **0** manually added Related Articles, **up to 5** automatically suggested articles will be displayed.
- When you have **1-4** manually added Related Articles, we will display a maximum of 5 articles, filling in the empty slots with automatic suggestions (where we can find them).
- When you have **5 or more** manually added Related Articles, only those will be displayed.

Note: automatic suggestions are created using keyword matching between article titles; if the system can't find enough matches, it won't display the full number of articles.

So, for example, let's say I've set the number of Related Articles to automatically display to five.

I have manually added three Related Articles to my article:



When I view this in the knowledge base, I'll see those three articles first, in the order I selected. Automatic suggestions will try to fill the remaining two spots:



The automatic suggestions help fill this to a total of five, but they aren't always the best resources to suggest. If you want to have total control over what's displayed, you'll want to disable the automatic suggestions across your entire knowledge base.

Turn on automatic Related Article suggestions

Last Modified on 12/03/2024 3:32 pm EST

No setup required for manual Related Articles
You don't need to change any settings to manually add Related Articles to your content, though you might want to Backward suggest Related Articles.

Want to save you or your writers some time? Let the knowledge base automatically suggest up to ten related articles, either from across the entire knowledge base or only from within the same top-level category as the current content.

This can be a great time-saving feature if you've inherited a knowledge base or imported content from another tool, before you've had a chance to manually suggest related articles.

To enable automatic Related Articles:

1. Go to **Settings > Basic**.
2. In the **Website Settings** section, look for the **Related article suggestions**.
3. Check the box to **Automatically suggest related articles based off of the article titles**.



4. *Optional:* Related Articles will automatically suggest articles across the entire knowledge base. If you would like to only suggest related articles from within the same top-level category as the current article or category, check the box to **Only automatically suggest articles from the current top level category**. (For example, if we use this setting for this page, you'd only see automatic related articles from within the Features category.)
5. *Optional:* If you still plan to manually add some related articles, we recommend you check the box to **Backward suggest articles**. Refer to Backward suggest Related Articles for more information.
6. *Optional:* Use the **Related articles limit** dropdown to change how many automatically-suggested related articles are displayed. Refer to Set the number of Related Articles to automatically display for more information.
7. Once you've finished making your selections, be sure to **Save** your changes.

Backward suggest Related Articles

Last Modified on 12/03/2024 3:29 pm EST

If you're using manually suggested Related Articles, you can save yourself a little bit of work using a knowledge base-wide setting to **Backward suggest articles**.

When you add a Related Article manually, you're only editing the article you're viewing. To create a perfect experience, you'd also need to go edit the related article to add the first article as related.

The **Backward suggest articles** setting basically does this for you.

For example, I edit **Article A** and add **Article B** as a related article.

- Without backward suggest, if I view **Article B**, I won't see **Article A** in the Related Articles section unless I specifically add it there.
- With backward suggest, if I view **Article B**, I will see **Article A** in the Related Articles section, even though I never specifically added it there. Article A won't show in the article editor for Article B, but it will show in the live knowledge base.

Basically, this setting makes the live knowledge base mirror all related article relationships automatically.

Backward suggestions are disabled by default. If you'd like to turn them on:

1. Go to **Settings > Basic**.
2. In the **Website Settings** section, look for the **Related article suggestions** section.
3. Check the box next to **Backward suggest articles which list the current articles as related.**



4. Be sure to **Save** your changes.

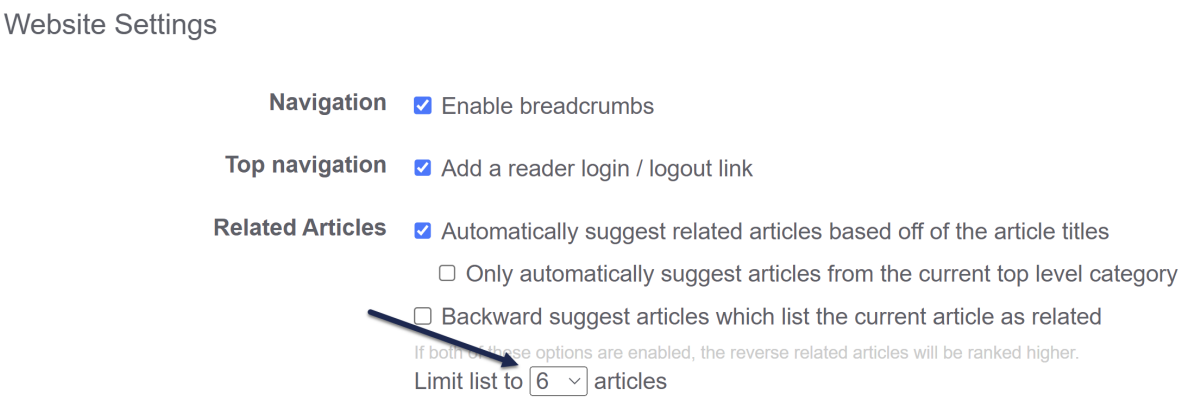
Set the number of Related Articles to automatically display

Last Modified on 05/29/2024 5:28 pm EDT

By default, our knowledge bases are set to display 5 Related Articles.

You can set this to any number between 1-10:

1. **Go to Settings > Basic.**
2. **Scroll to the Website Settings section.**
3. **In the Related Articles section, click on the Limit list dropdown and select the number of articles you'd like the section to display (1-10).**



4. **Be sure to Save your changes.**

This setting only sets the list limit for automatically suggested related articles. You can always manually add more than this limit and they will display!

Disable automatically suggested Related Articles

Last Modified on 05/29/2024 5:28 pm EDT

If you want to show only manually specified Related Articles, you can turn off automatic suggestions across your entire knowledge base. To do so:

1. Go to **Settings > Basic.**
2. In the **Website Settings** section, uncheck the box next to "Automatically suggest related articles based off of the article titles".



3. **Save.**

Articles and categories will now only display related articles that you've manually added. See Adding related articles for more information.

Display Related Articles only in specific articles

Last Modified on 12/03/2024 2:51 pm EST

What if, instead of showing this in all articles, you just want to show Related Articles in specific articles?

You can remove the merge code that generates the list from your Custom HTML, create a snippet to format a Related Articles section with the merge code, and then add that snippet to articles. More detailed instructions follow:

Step 1: Remove the merge code from Custom HTML

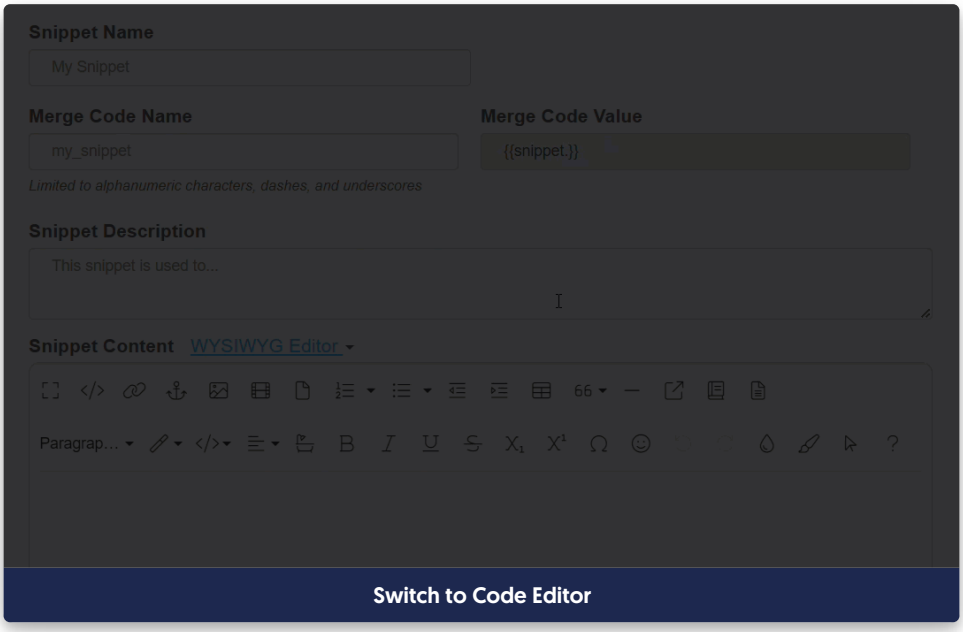
First, remove the merge code and any headings or surrounding divs from **Settings > Style > Custom HTML > Article**.

If you're unfamiliar with this HTML, see Default Article HTML, rows 26-29 for our default placement to help you find it so you can remove it.

Step 2: Create a snippet

Next, create a snippet that will format the section and add the merge code:

1. Create a snippet. We recommend using "Related Articles section" or something similar as the Snippet Name.
2. In the **Snippet Content** dropdown, select **Code Editor**.

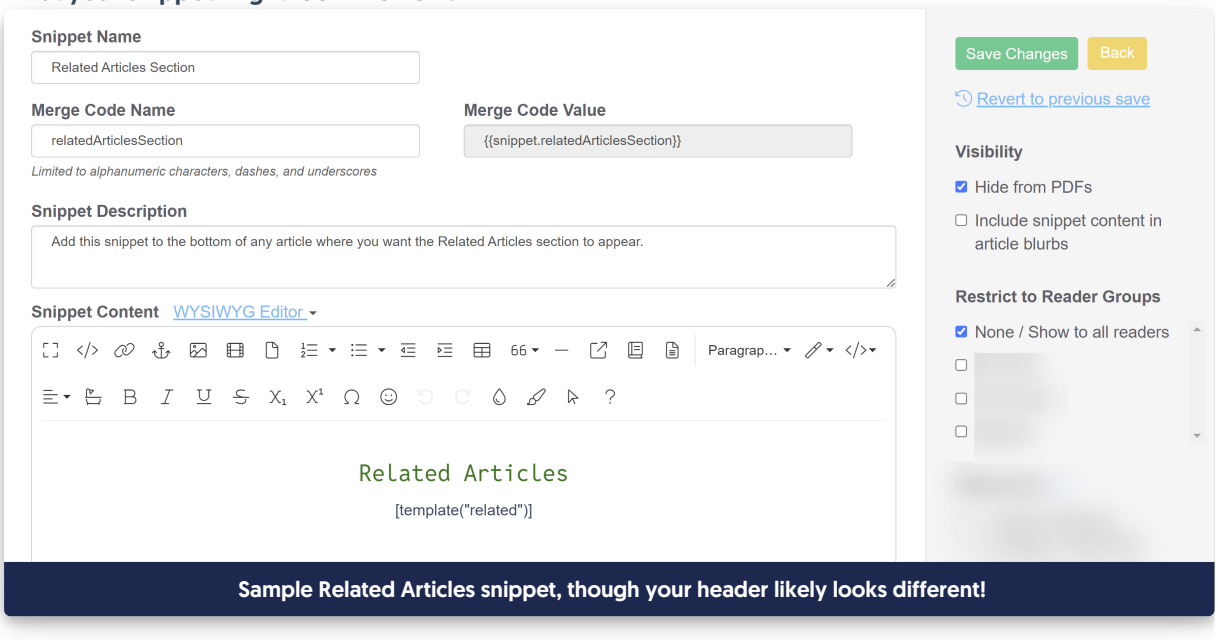


3. Copy the code below and paste it into the Code editor.

```
<div class="ko-related-articles text-center">
  <h3>Related Articles</h3>
  [template("related")]
</div>
```

4. You can toggle back to the WYSIWYG editor using the **Snippet Content** dropdown if you'd like to make further changes to the Related Articles header, add explanatory text, etc. We recommend keeping the div wrapped around the whole section to guarantee the text stays centered, though!

5. In the right column of the snippet editor, in the **Visibility** section, check the box to **Hide from PDFs**. Here's what your snippet might look like now:



Sample Related Articles snippet, though your header likely looks different!

6. Once you're done editing the snippet, select the **Create** button to fully create it!

Step 3: Use the snippet

With your snippet created, you can now add that snippet into the articles where you'd like to display this section.

See Add snippets in content for full steps on how to do this.

You can also add the snippet merge code into a topic display category Category Description or the body of a custom content category!

Readd the Related Articles section to my articles

Last Modified on 05/29/2024 5:27 pm EDT

If you have a customized theme, the Related Articles section might have been removed entirely. Below, we offer instructions on how to re-add it to your main article body or the right column. Choose the implementation that makes sense for you!

Add the Related Articles List to all articles

If for some reason you don't see the Related Articles list, it's probably previously been removed in custom theme work. You can place the related articles merge code in the HTML of all articles to get it back. See Default Article HTML, rows 26-29 for our default placement.

Add the Related Articles List to the right column of your knowledge base

By default, we also include the Related Articles in the right column (which is generally only used/displayed in our older themes).

If you're using one of our older themes that displays the right column and you're not seeing Related Articles there, you can grab some HTML from our Default Right Column HTML to re-add it, see rows 14-16.

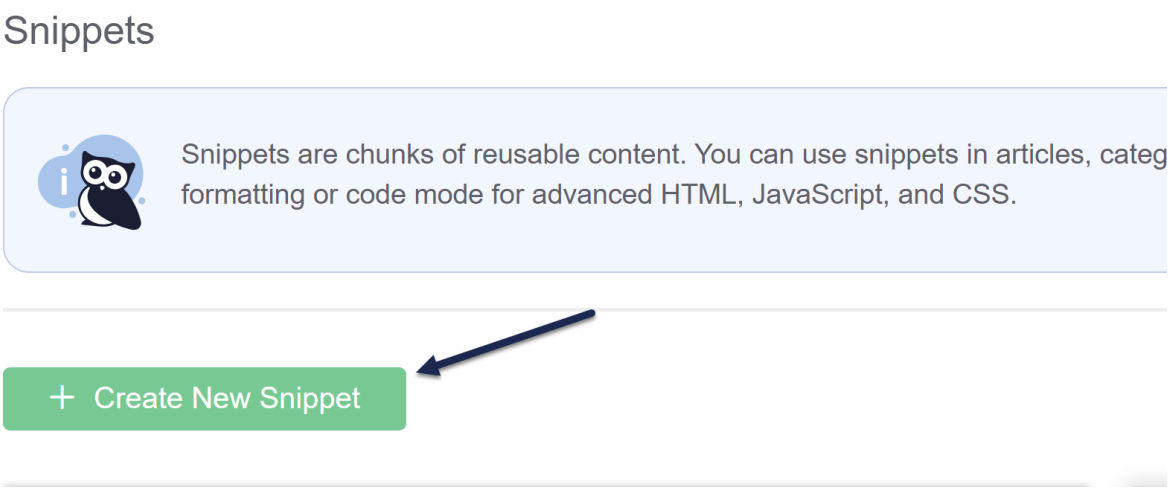
Hide Related Articles section from a specific article

Last Modified on 12/03/2024 2:52 pm EST

If you've added the Related Articles template to your article template globally, sometimes it's useful to be able to hide it from specific individual articles. For example, maybe you are using automatically suggested related articles overall, but this particular article, the suggestions don't make sense (perhaps this article contains your company W9 and everything it's suggesting as related is product documentation, for example).

For this scenario, we recommend creating a snippet that will hide the Related Articles section and then only adding that snippet to the specific articles where you want to hide the section. First, create the snippet:

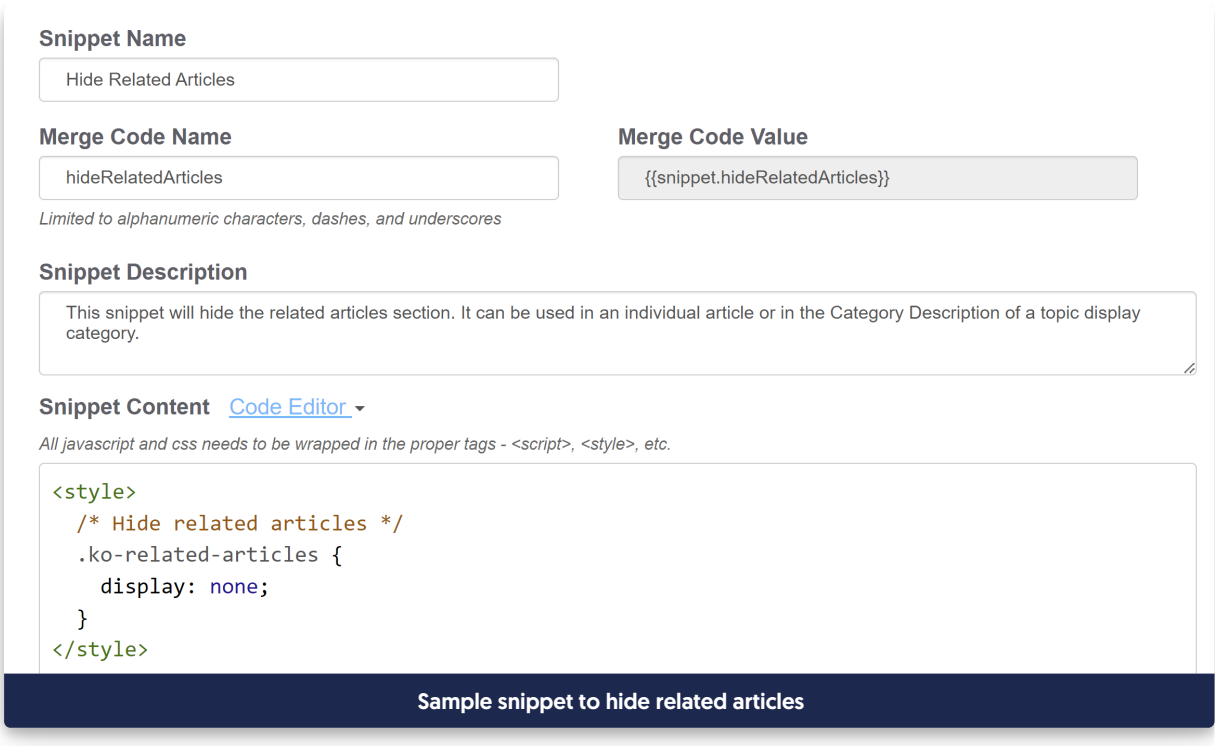
1. Go to **Library > Snippets.**
2. Select **+ Create New Snippet.**



3. Give your snippet a name, like "Hide Related Articles."
4. Give your snippet a description, like "Use this snippet in articles to hide the Related Articles section."
5. Click the dropdown to change the editor to the Code Editor.
6. Copy the code below and paste it into the Code Editor window in your snippet.

```
<style>
 /* Hide related articles */
 .ko-related-articles {
  display:none;
 }
</style>
```

Your completed snippet should look something like this:



7. Click the **Create** button.

Now that your snippet exists, any of your content writers or editors can add it to an article using the Insert snippet option.

Troubles creating your snippet? Review the instructions on creating a snippet for more help.

Optional tweak to hide horizontal line

If your Related Articles section is the only thing in your article footer, and hiding it leaves behind a mystery grey line, you can edit the snippet to include logic to hide that grey divider line, as well. The structure depends on your theme; you may need to right-click on the divider line and Inspect Element to see which classes to use, but here's a sample for our Minimalist theme:

```
<style>
 /* Hide related articles */
 .ko-related-articles {
   display:none;
 }
 /* Hide grey bottom border of article body */
 .hg-minimalist-theme .hg-article-body {
   border-bottom: none;
 }
</style>
```

Snippet Name

Hide Related Articles

Merge Code Name

hideRelatedArticles

Limited to alphanumeric characters, dashes, and underscores

Merge Code Value

{{snippet.hideRelatedArticles}}

Snippet Description

This snippet will hide related articles and the line that appears above them. It can be used in an individual article or in the Category Description of a topic display category.

Snippet Content Code Editor

All javascript and css needs to be wrapped in the proper tags - <script>, <style>, etc.

```
<style>
  /* Hide related articles */
  .ko-related-articles {
    display: none;
  }
  /* Hide grey bottom border of article body */
  .hg-minimalist-theme .hg-article-body {
    border-bottom: none;
  }
</style>
```

Sample snippet to hide Related Articles and the grey line

Hide Related Articles when there are none

Last Modified on 05/29/2024 5:28 pm EDT

You can add some code to hide the Related Articles section when there are no Related Articles present.

1. Go to **Settings** > **Style**.
2. Click on the **Custom HTML** tab.
3. Select **Article** from the dropdown.
4. If your Related Articles section appears at the bottom of all articles, copy this code. Otherwise, skip to step 5:

```
<script>
 //If Related Articles section at bottom of the article has no related articles, hide the section
 $(function() {
   if( $('.ko-related-articles ul li:eq(0)').text().trim() == "None" )
     $('.ko-related-articles').hide();
 });
</script>
```

5. If your Related Articles section appears in the right hand column of all articles, copy this code:

```
<script>
 //If Related Articles section in the righthand column is empty, hide the section
 $(function() {
   if( $('.related-panel ul li:eq(0)').text().trim() == "None" )
     $('.related-panel').hide();
 });
</script>
```

6. Paste the code you copied above into the bottom of the Article Custom HTML code editor. For example:



Example of the script added to hide the empty Related Articles section at the bottom of articles

7. **Be sure to Save your changes.**

Hide Related Articles when there is only one or less

Last Modified on 12/03/2024 2:50 pm EST

You can add some code to hide the Related Articles section when it contains 1 or 0 articles.

To do so:

1. Go to **Settings** > **Style**.
2. Click on the **Custom HTML** tab.
3. Select **Article** from the dropdown.
4. If your Related Articles section appears in the right hand column of all articles, copy this code. Otherwise, skip to step 5:

```
<script>
 //If Related Articles section in righthand column has 1 or 0 articles, hide the section
 $(function() {
  if( $('.related-panel ul li').length < 2 )
   $('.related-panel').hide();
 });
</script>
```

5. If your Related Articles section appears at the bottom of all articles, copy this code:

```
<script>
 //If Related Articles section at bottom of article has 1 or 0 articles, hide the section
 $(function() {
  if( $('.ko-related-articles ul li').length < 2 )
   $('.ko-related-articles').hide();
 });
</script>
```

6. Paste the code you copied above into the bottom of the Article Custom HTML code editor.
7. Be sure to **Save** your changes.

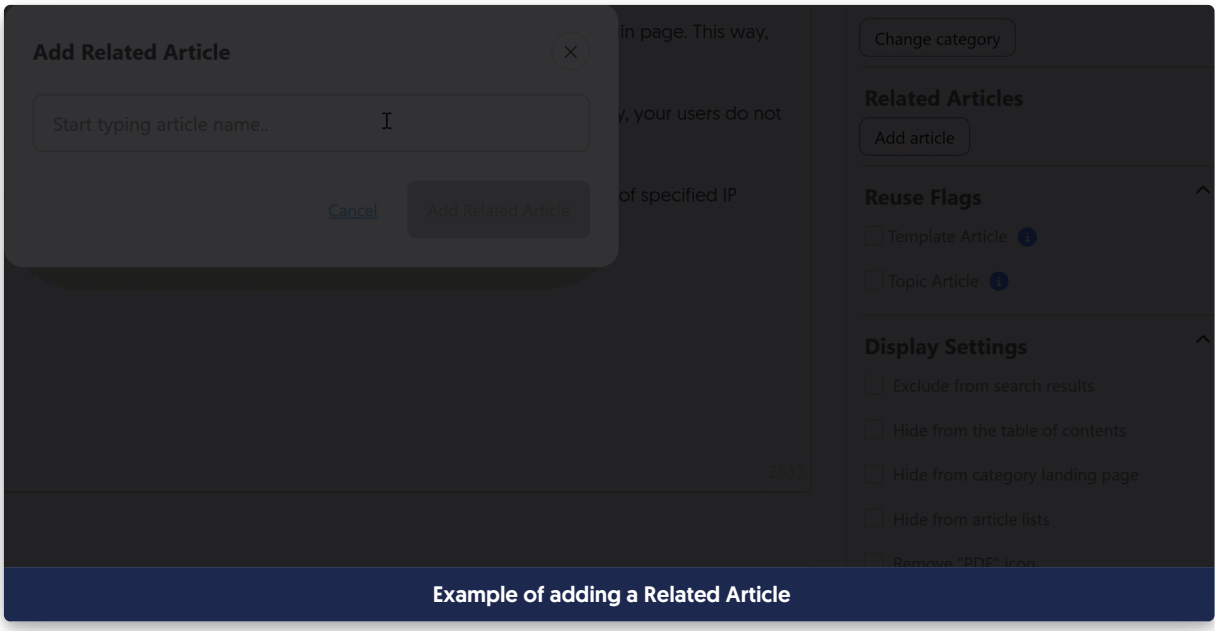
Add related articles

Last Modified on 12/03/2024 3:35 pm EST

While you can use automatic suggestions for your related articles, for the best control, you'll want to manually suggest them.

To add a related article:

1. **Open the article or category for editing.**
2. **In the Related Articles section, select Add article.**
3. **Type the article or category title you want to add as a related article. The dropdown autosuggests articles or categories based on what you've typed.**
4. **Select the article or category, then select Add Related Article.**



Example of adding a Related Article

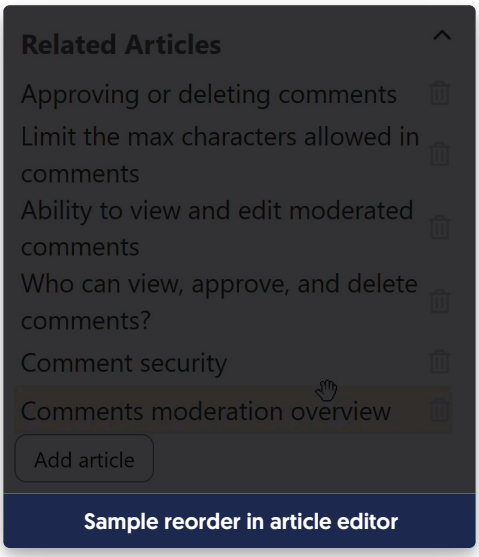
5. **Be sure to Save the article.**

Reorder or remove Related Articles

Last Modified on 12/03/2024 2:44 pm EST

Once you have two or more Related Articles added, you can reorder them and remove them.

To reorder your related articles, click on the article title and drag it where you'd like it to go:



Sample reorder in article editor

To remove a related article, select the trashcan icon next to its title.

Contact form overview

Last Modified on 05/29/2024 5:27 pm EDT

KnowledgeOwl's Contact Form gives your readers a way to email you or submit a ticket to your existing ticketing system.

The contact form is not meant to replace your current ticketing system. It is designed to add some power to it. With the KnowledgeOwl contact form, you can continue to use the email address or help desk account you are currently using for support tickets but it will be funneled through our system first.

Our contact form easily integrates with Zendesk, Freshdesk, and any other existing systems that accept email submissions. You can also use the contact form within our contextual help widget, which can create a contextual popup contact form and suggestion tool in your knowledge base, website or application.



By default, all knowledge bases are created with the Contact Form enabled, using the email address of the person who created the knowledge base as the Send To email address.

Why should I use your contact form?

By having support requests go through our system, we can track additional information such as what the person was searching for and what they did after they searched. If you utilize both the contact form and the widget, we can get even more information like the exact screen of your application they were on when they performed the search.

Are there any other benefits?

Our contact form is designed with preventative support in mind. Because of this, when a reader tries to submit a ticket we will first ask them to enter the subject line of their request. We then take that subject line and do a search for any articles in your knowledge base that might be able to answer their question.

If we find any articles that match, we will display them inline to the reader so that they can look at them without having to leave the contact form. If they do find help in one of those articles, great! We prevented a ticket. If they don't find help there, they can click "Submit" and finish filling out the rest of the form. By having them go through this process we can collect data about them, and try to answer their question before they have to contact us.

What data is collected in the Contact Form?

Last Modified on 05/29/2024 5:28 pm EDT

The Contact Form can track:

- Data that your reader explicitly adds into it
- Metadata about your reader's browser, location, etc.

Data from your reader

When a reader fills out the Contact Form, they'll include:

- The subject of their request (the original search they used in the Contact Form is used by default, though they can edit this)
- Details about their request (a text field they can add additional information to)
- Their name
- Their email address
- Optional: Uploaded file(s)
- Optional: Any additional custom fields you've enabled in your contact form

Metadata about your reader

KnowledgeOwl also captures:

- Date and time of the search/contact form submission
- The sender's IP address
- The sender's browser
- The sender's operating system
- In our contextual help widgets, the sender's location (the relative URL of the page the widget was opened on)

Where is this data used?

By default, KnowledgeOwl will store the above information in Reporting > Contact Form.

Can I restrict this data?

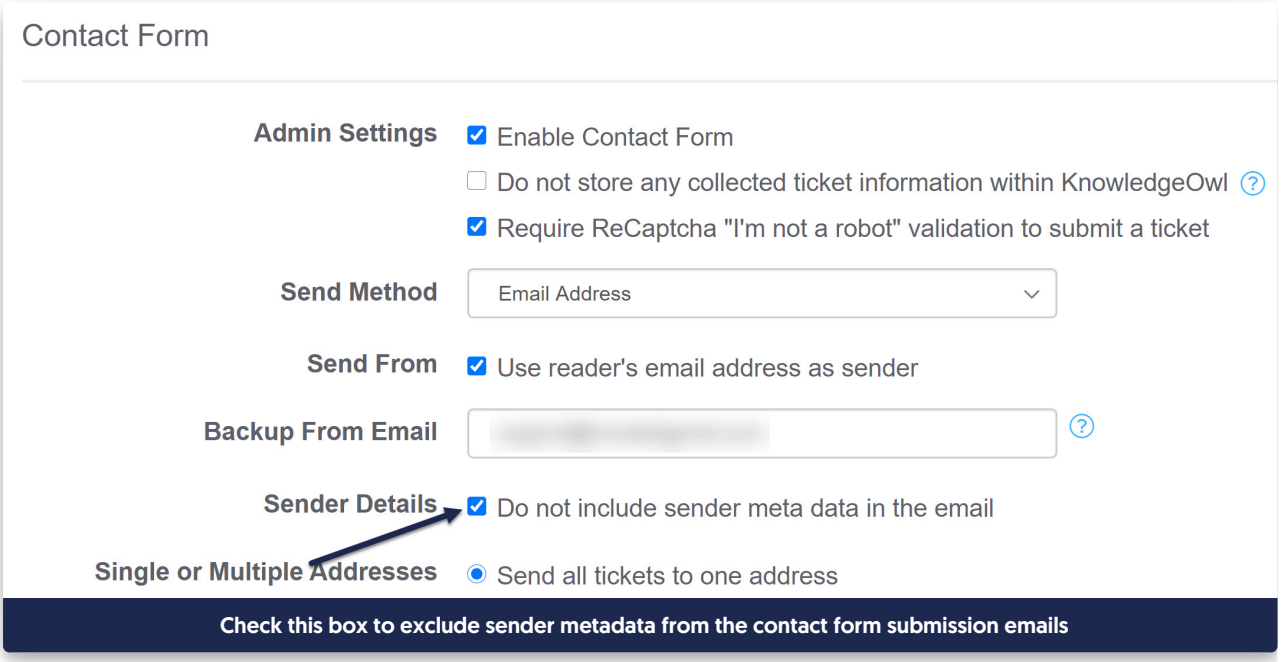
You have two ways you can further restrict this data: excluding the sender's metadata from your emails, and not storing any collected ticket information within KnowledgeOwl.

Exclude sender metadata from emails

If you are using the Email Address Send Method for your contact form, you can choose to exclude the sender's metadata from the email. This will include all of the information the reader added but will exclude their IP

address, browser, and OS from the body of the email.

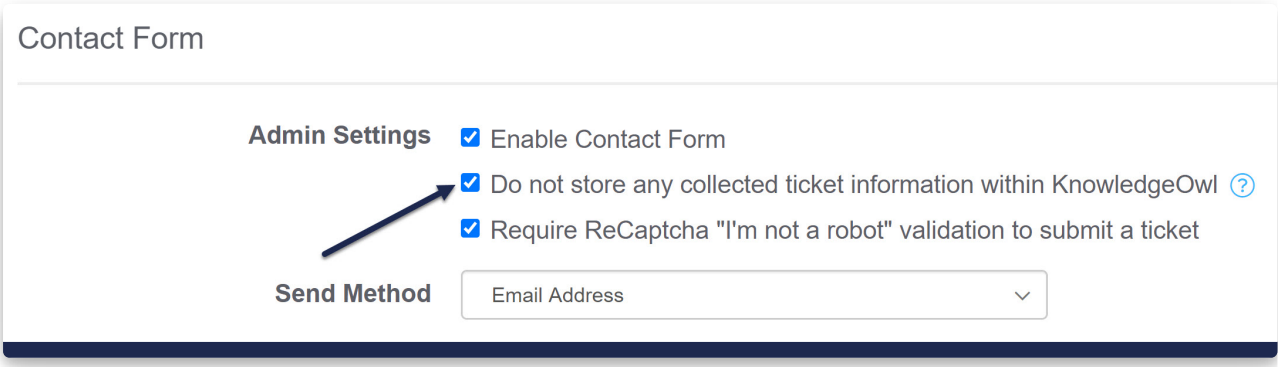
This setting will exclude that metadata from the email but it will still be included in Reporting > Contact Form.



Use this setting when you don't want the sender's metadata included in emails for security purposes, but you still want it tracked.

Don't store any ticket information within KnowledgeOwl

If you don't want KnowledgeOwl to store any data about your requestor, you can check the box next to "Do not store any collected ticket information within KnowledgeOwl":



Check this box to disable data storage of contact form submissions in KnowledgeOwl

When this box is checked, KnowledgeOwl will pass along the information the requestor entered and their metadata, but will not store any of that data in Reporting > Contact Form. While this affords greater security, it also means that KnowledgeOwl cannot recover information on any submissions that fail due to email or integration issues.

Use this setting only when you absolutely do not want KnowledgeOwl to store any of your ticket information.

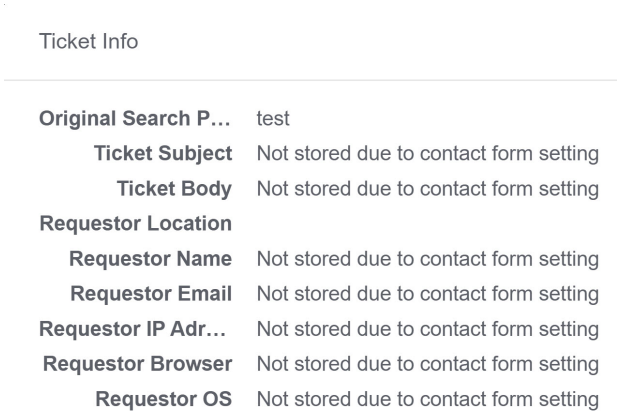
With this setting selected, the only data displayed in Reporting > Contact Form will be:

- Date/timestamp of the ticket submission

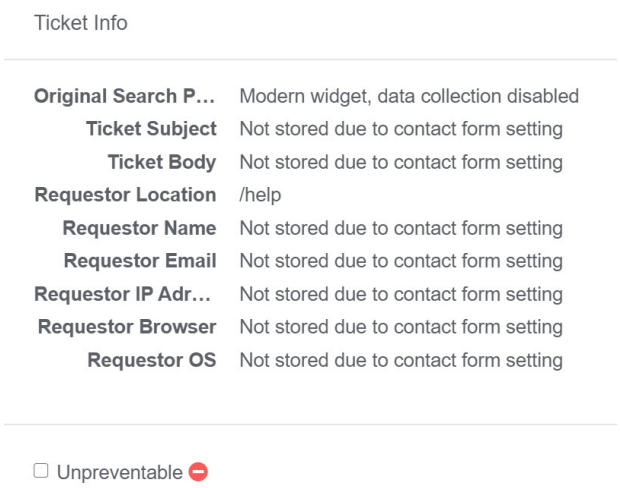
- The original search phrase
- If submitted through the widget, the location the ticket was submitted through (called Requestor Location)

All other fields will show the same string: "Not stored due to contact form setting". We use this wording so that you can still track overall ticket deflection/submission even without storing ticket information in KnowledgeOwl.

Here's an example of the information stored in Reporting > Contact Form with the "Do not store any collected ticket information within KnowledgeOwl" box checked, submitted through the knowledge base Contact Form (not the widget):



And here's an example with the same box checked, contact form submitted through the widget:



Create Tickets from Customers in your Help Desk or CRM

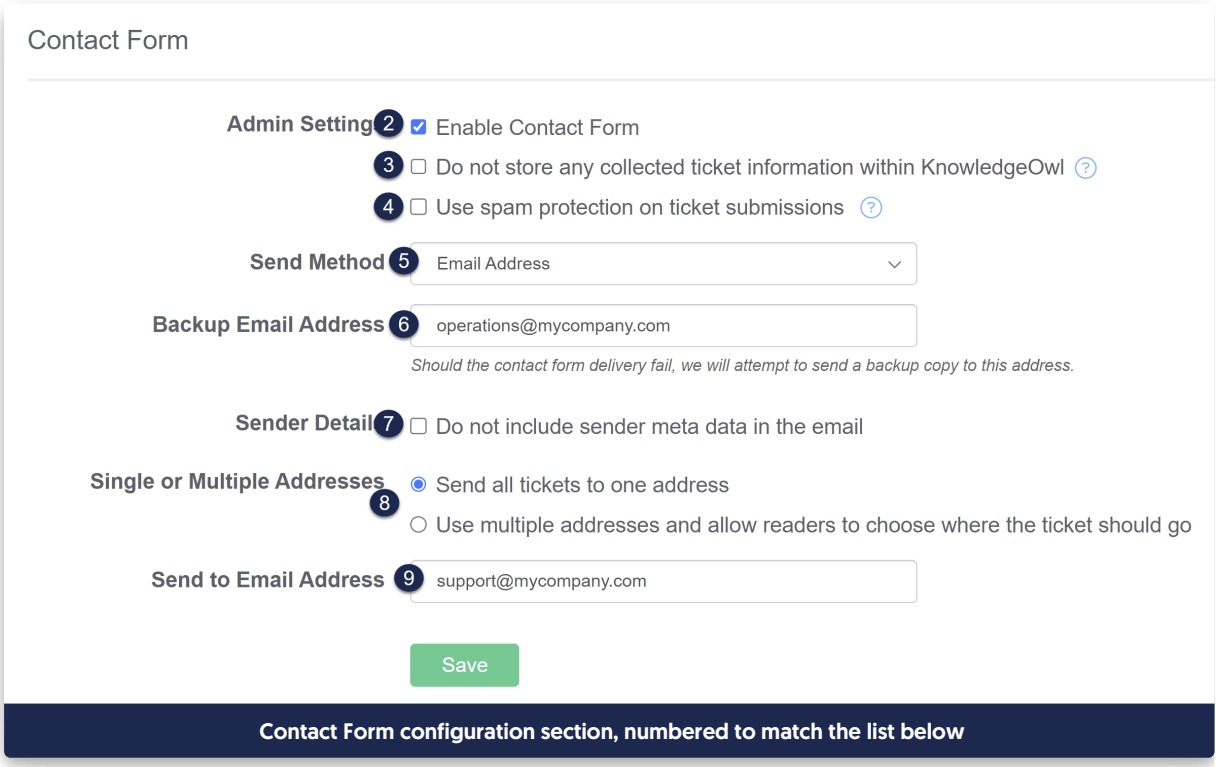
Last Modified on 05/29/2024 5:27 pm EDT

The most popular configuration for our Contact Form is to use the Email Address Send Method. This method allows you to send an email from your readers to one or more email addresses of your choice.

These email addresses can be shared inboxes or can feed directly into your help ticketing/help desk, CRM, or other system. Basically any system that allows email submission can be integrated with our Contact Form using this method!

To set up your contact form this way:

1. **In the lefthand navigation, go to Contact Form.**



Contact Form configuration section, numbered to match the list below

2. **Check the box next to Enable Contact Form to activate the contact form in your knowledge base.**

3. ***Optional:* If you don't want any information about the ticket to be stored in KnowledgeOwl, check the box next to Do not store any collected ticket information within KnowledgeOwl. See What data is collected in the Contact Form? for more info.**

4. ***Optional, Recommended for any public-facing content:* You can choose to Use spam protection on ticket submissions. If your knowledge base requires logins, you probably don't need this, but if your knowledge base is available to the public, we strongly recommend checking this box!**
    - **This setting will use whatever spam protection method has been saved in Settings > Basic > Spam**

Protection Settings.

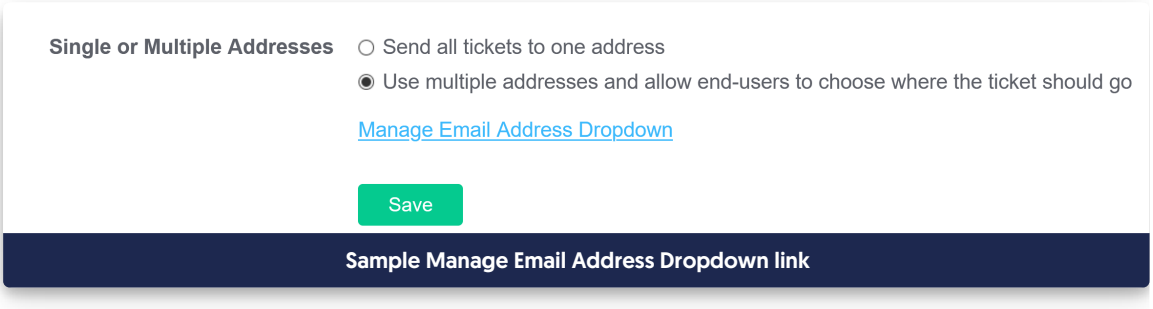
- If you are using a private domain with the reCAPTCHA spam protection method, you'll need to add reCAPTCHA information to **Settings > Basic** for this feature to work. See Add reCAPTCHA for more details.

5. Choose **Email Address** as your **Send Method**. (We have direct integrations with Zendesk and Freshdesk, too).

6. *Optional, Recommended:* Add a **Backup Email Address**. If we have any issues sending emails to your **Send to Email Address**, we'll resend the contact form submissions to this backup. See Contact form submission email delivery issues for more information on this setting.

7. *Optional:* By default, the contact form captures some metadata about your senders. If you don't want to capture this metadata, check the box next to **Do not include sender meta data in the email**. See What data is collected in the Contact Form? for more info.

8. You can choose to send contact form submissions to a single email address (the default selection) or to multiple addresses.
   - When multiple addresses is selected, your readers will be able to see the different addresses and select one from a list. You'll see options to Manage the Email Address Dropdown if you select the multiple email address option:

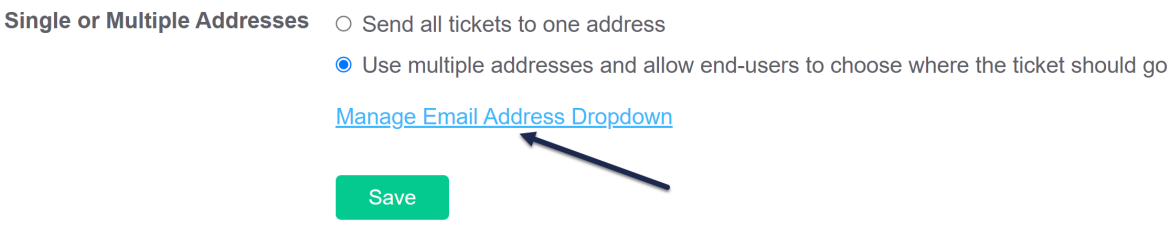


Sample Manage Email Address Dropdown link

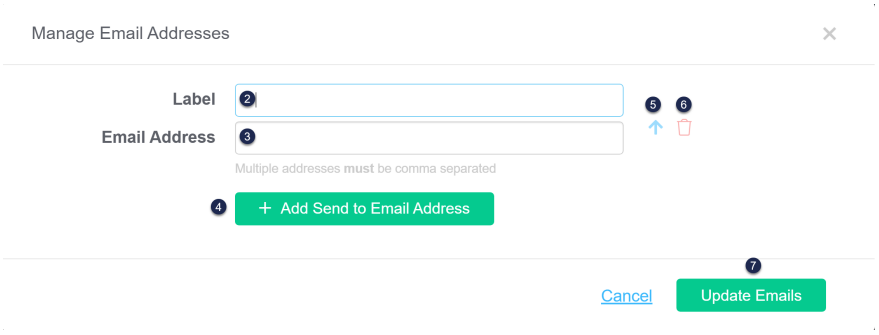
9. If you are sending all tickets to one address, add that email address in the **Send to Email Address** field. This can be an individual email, shared group email, or an email address that creates tickets or conversations in your CRM, ticketing system, etc.

> Contact form submissions will be sent from helprequest@knowledgeowl.com. You may need to set up rules or exceptions for these emails to be delivered properly.

10. If you selected multiple email addresses, click the **Manage Email Address Dropdown** to add the email addresses.



i. In the Manage Email Addresses pop-up, you'll configure what your reader will see when they interact with the Contact Form (the **Label**) and the Email address(es) that will be emailed when that selection is made:



ii. Add the **Label** you'd like your readers to see in the Contact Form dropdown.

iii. Add at least one **Email Address** for that label--this is where the contact form submissions will be sent if the reader selects this option. You can send to multiple email addresses for each label by providing a comma-separated list, like:
`email1@knowledgeowl.com, email2@knowledgeowl.com`

iv. To add an additional dropdown option, select the **+ Add Send to Email Address** button.

v. To reorder your dropdowns, use the up arrow to the right of a label/email address combo.

vi. To remove one of your dropdown options, use the trashcan to the right of the label/email address combo.

vii. Once you're done adding configuring your email addresses, select the **Update Emails** button to close the pop-up.

11. *Optional:* Use the Contact Form Text fields to customize the Body fields for your Contact Form. Non-body field text can be customized using the Customize Text tool. See Section breakdown: Contact Form for more information.

12. *Optional:* Use the Contact Form Custom Inputs fields to add more custom fields you'd like readers to fill out, and mark them as optional or required for submission.

13. Once you've finished making changes, be sure to **Save**.

Your Contact Form is now live at /contact-us! You can Update wording in the Contact Form and/or Customize Contact Form Link to make it even more your own.

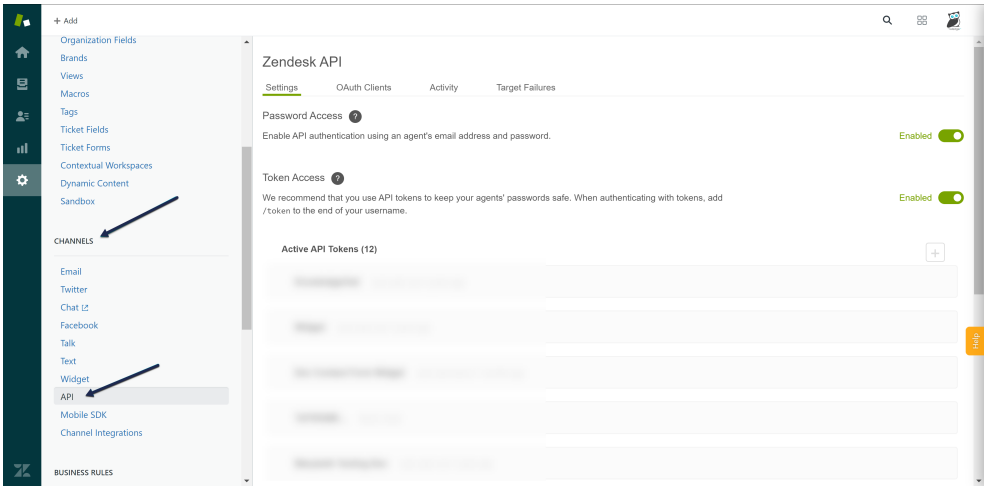
Create Zendesk Tickets

Last Modified on 05/29/2024 5:27 pm EDT

You can set up your contact form and Contextual Help Widget (2.0) to automatically create tickets in your Zendesk account. The contact form will then create tickets via the API as your specified user and include some helpful metadata in a private comment.

To set this up, you'll need this info from Zendesk:

- Your Zendesk **domain** - this appears before zendesk.com when you set up your account. It's also viewable in Zendesk through **Admin > Account > Branding** in the Subdomain section.
- Your Zendesk **username** - what you use to log in to Zendesk with
- A Zendesk **API key** - you can create one through **Admin > Channels > API**:



Once you have this information in hand, you can configure your KnowledgeOwl Contact Form to use Zendesk:

1. In the lefthand menu, select **Contact Form**.
2. Check the box next to **Enable Contact Form**.
3. *Optional:* If you don't want KnowledgeOwl to store any of your contact form submission details, check the box next to **Do not store any collected ticket information within KnowledgeOwl**. See What data is collected in the Contact Form? for more information.
4. *Optional, Recommended:* If your knowledge base is public in any way, we recommend checking the box to **Use spam protection on ticket submissions** to try to prevent spam/bot submissions. This setting will add whichever spam protection method is set in **Settings > Basic > Spam Protection Settings**.
5. *Optional, Recommended:* Add a **Backup email**. If the Zendesk API integration isn't working for any reason, we will email contact form submissions to this backup email account.
6. Choose Zendesk as your **Send Method**.
7. Add your Zendesk domain, username, and API key.

8. *Optional:* If you'd like to include the Zendesk Priority field in your KnowledgeOwl contact form, check the box next to **Enabled**. You can make it **Required** by checking that box, too.

9. *Optional:* If you're using custom fields in Zendesk that you want included in your contact form, add them into the Custom Fields section:

    a. The **label** specifies how the field will be labeled in the contact form.

    b. The **Type** defines what kind of data it should accept.

    c. The **ID**is the ID as it appears in your Zendesk configuration.

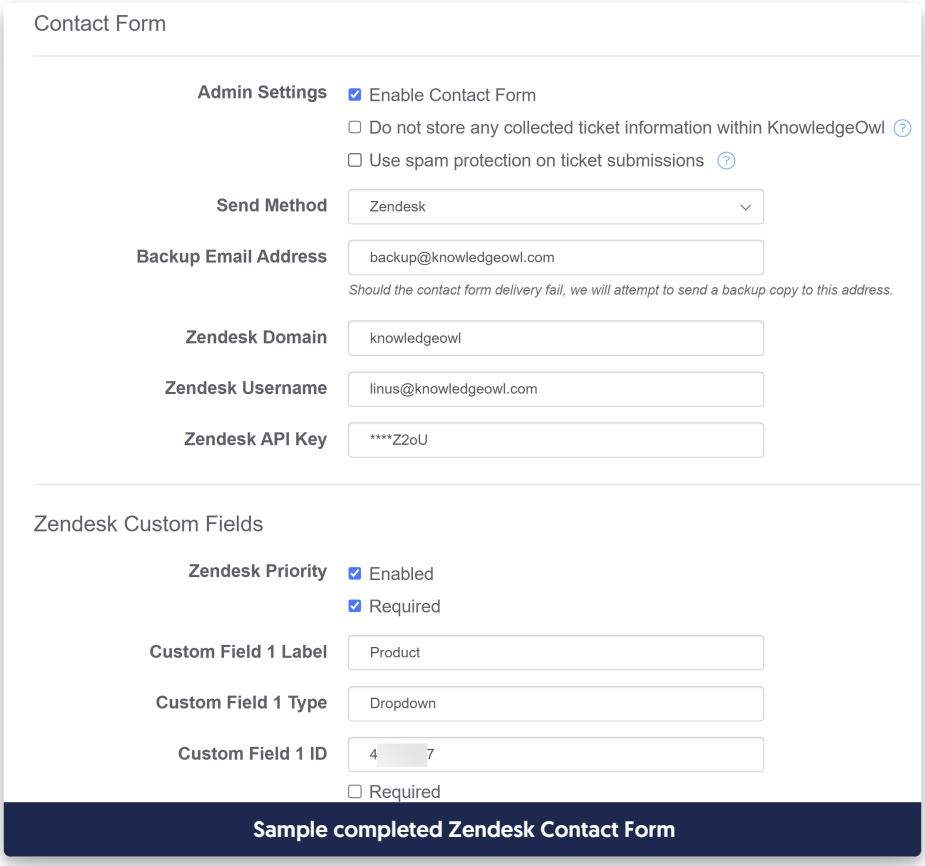


Zendesk custom fields are not compatible with Contextual Help Widget (2.0).

10. Be sure to **Save** your changes.

Your Contact Form is now live at /contact-us! You can Update wording in the Contact Form and/or Customize Contact Form Link to make it even more your own.

A completed setup might look like this:



Sample completed Zendesk Contact Form

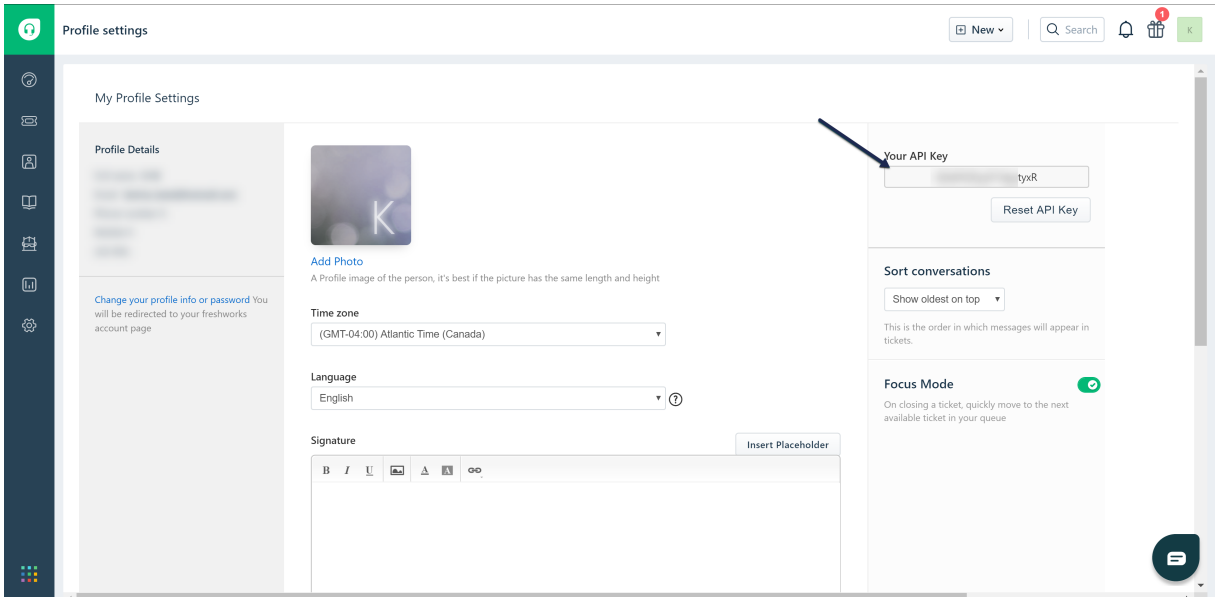
Create Freshdesk Tickets

Last Modified on 05/29/2024 5:27 pm EDT

You can set up your contact form and embedded contact widget to automatically create tickets in your Freshdesk account. The contact form will then create a Freshdesk ticket via the API as your specified user.

To set this up, you'll need this info from Freshdesk:

- **Your Freshdesk domain** - this appears before freshdesk.com when you set up your account.
  - If your Freshdesk account uses a custom URL (like helpdesk.yourcompany.com), don't enter that custom URL here.
  - If you don't know your original Freshdesk subdomain, you can go to **Admin > Portals**, click to select the portal, and check the Portal URL settings, which will show the freshdesk subdomain.
  - You can also go to https://freshdesk.com/login, click the **Forgot your helpdesk domain** link, and enter your email address to find it.
- **Your Freshdesk API key** - you can find your API key or reset it by clicking your profile icon in the upper right and selecting **Profile Settings**. You'll see your API key in the upper right:



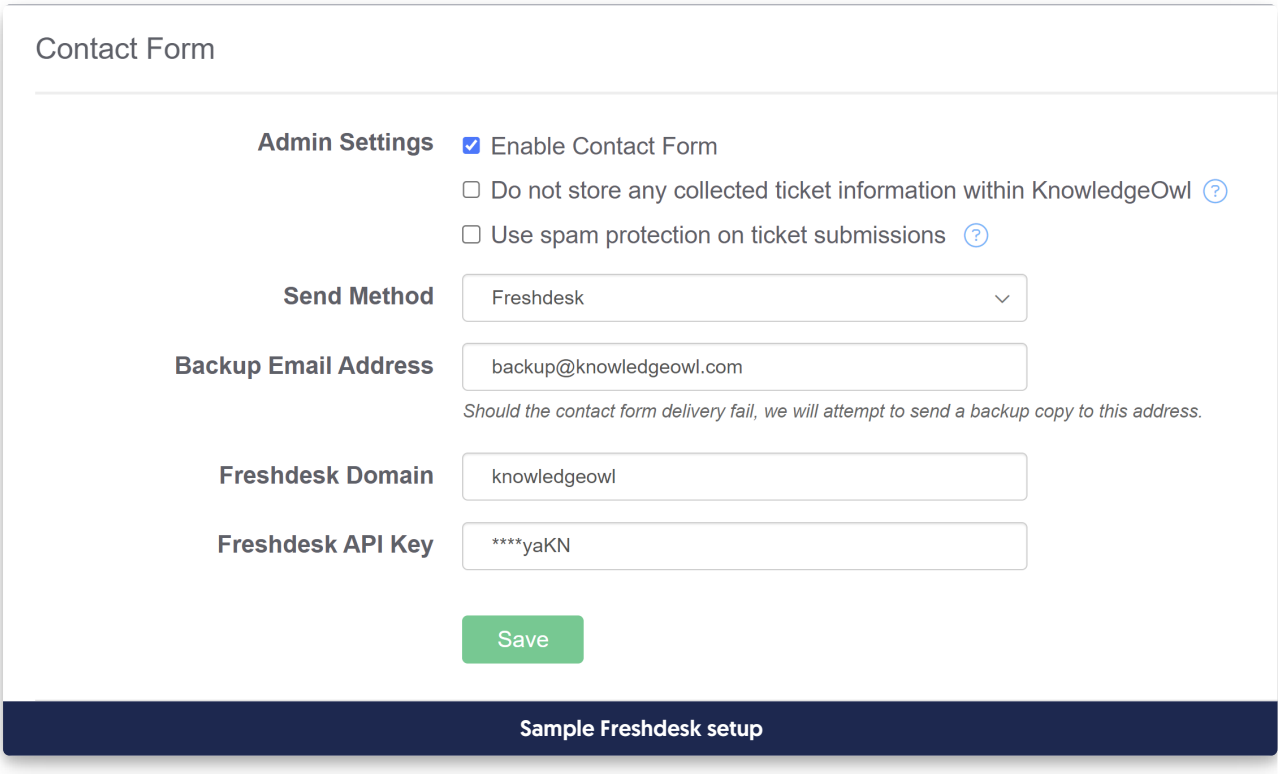
Once you have this information in hand, you can configure your KnowledgeOwl Contact Form to use Freshdesk:

1. In the lefthand menu, select **Contact Form**.
2. Check the box next to **Enable Contact Form**.
3. *Optional:* If you don't want KnowledgeOwl to store any of your contact form submission details, check the box next to **Do not store any collected ticket information within KnowledgeOwl**. See What data is collected in the Contact Form? for more information.
4. *Optional, Recommended:* If your knowledge base is public in any way, we recommend checking the box to **Use spam protection on ticket submissions** to try to prevent spam/bot submissions. This setting will add whichever spam protection method is set in **Settings > Basic > Spam Protection Settings**.

5. Choose Freshdesk as your **Send Method.**
6. *Optional, Recommended:* Add a **Backup email.** If the Zendesk API integration isn't working for any reason, we will email contact form submissions to this backup email account.
7. Specify your **Freshdesk domain** and **API Key.**
8. **Save.**

Your Contact Form is now live at /contact-us! You can Update wording in the Contact Form and/or Customize Contact Form Link to make it even more your own.

A completed setup might look like this:



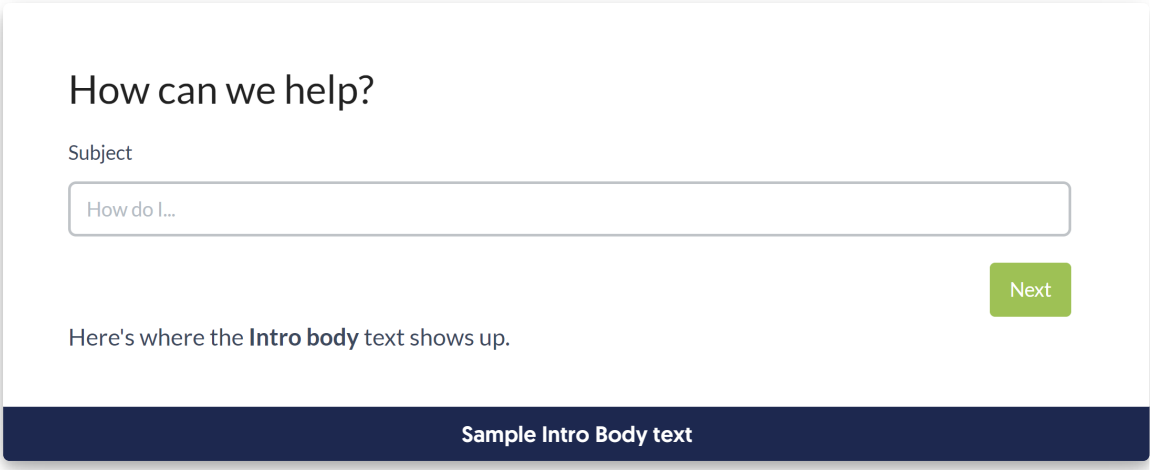
Sample Freshdesk setup

Update wording in the Contact Form

Last Modified on 05/29/2024 5:28 pm EDT

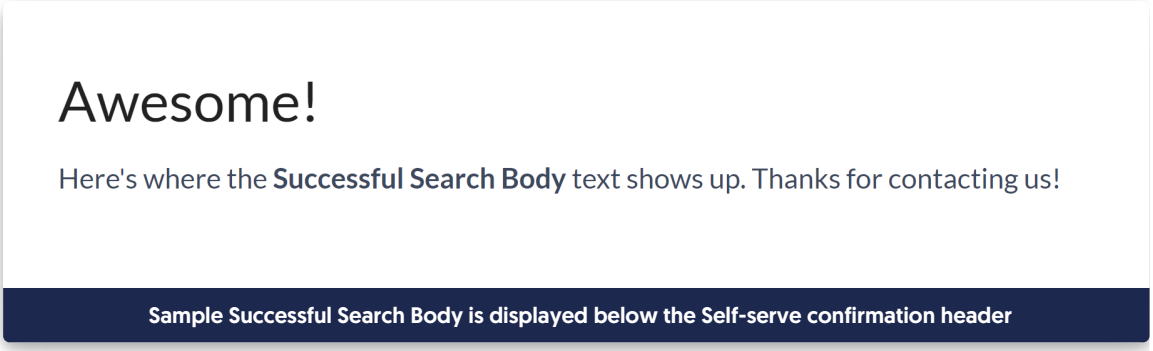
You can update wording for the Contact Form in two places:

- **Tools > Customize Text:** For all of the text-only fields in the Contact Form, go to **Tools > Customize Text**. Select **Contact Form** in the Knowledge Base Section dropdown and customize the text strings used. See Section breakdown: Contact Form for more information on the individual strings, and Add or edit your own text string for using the tool.
- **Knowledge Base > Contact Form:** The Contact Form supports three body fields that accept raw HTML: Intro Body, Successful Search Body, Form Submitted Body. This is the body of the form that's displayed at various steps along the way. Go to **Knowledge Base > Contact Form** and look for the **Contact Form Text** section to update these sections!
  - **Intro Body: This text is displayed on the Contact Form intro page, below the search bar and the Next button:**



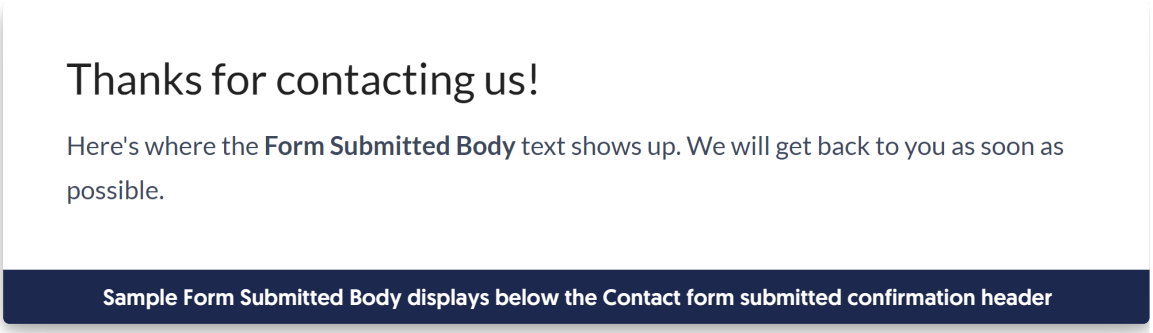
Sample Intro Body text

  - **Successful Search Body: This text is displayed after the reader confirms a successful self-serve by clicking the "Yes! That Helped!" button or its equivalent. It displays beneath the Self-serve confirmation header text string:**



Sample Successful Search Body is displayed below the Self-serve confirmation header

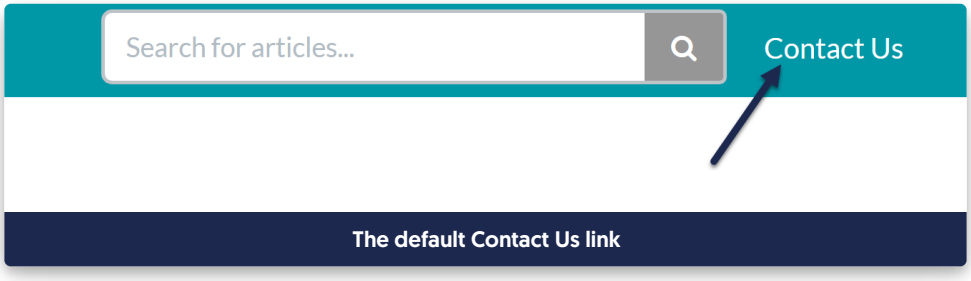
  - **Form Submitted Body: This text is displayed after the reader submits the contact form. It displays beneath the Contact form submitted confirmation header text string:**


Thanks for contacting us!
Here's where the Form Submitted Body text shows up. We will get back to you as soon as possible.
Sample Form Submitted Body displays below the Contact form submitted confirmation header

Customize Contact Form Link

Last Modified on 05/29/2024 5:28 pm EDT

Once you've enabled the contact form, you can change the Contact Us link in the top navigation.



The default Contact Us link

To do so:

1. Go to **Tools > Customize Text.**
2. Select **Top Navigation** from the Knowledge Base Section dropdown.
3. Find the row for the "Contact Us" default text string.
4. Click the gear cog icon next to that row.
5. Add the new link text you'd like to display.
6. Once you have the text as you'd like, be sure to select **Update Text String**.

The change will now be live in your knowledge base!

For more detailed instructions on working with the Customize Text tool, see Add or edit your own text string or check out Section breakdown: Top Navigation for other top navigation elements you can customize.

Contact form submission email delivery issues

Last Modified on 05/29/2024 5:27 pm EDT

We know how important contact form submissions can be, so we provide two methods to handle cases where we may have problems sending those messages:

- A **Backup Email Address**: we will send contact form submissions to this backup email address if we detect any issues sending emails to the Send To Email Address.
- **Email delivery issue warning**: when our email delivery provider gets any errors or issues delivering to the Send to Email Address, we'll display a warning to let you know there are problems. The details of this warning will give you the option to resend messages sent within the last three days, information on the error(s) with the email address, etc.

See the corresponding sections below for more details on each.

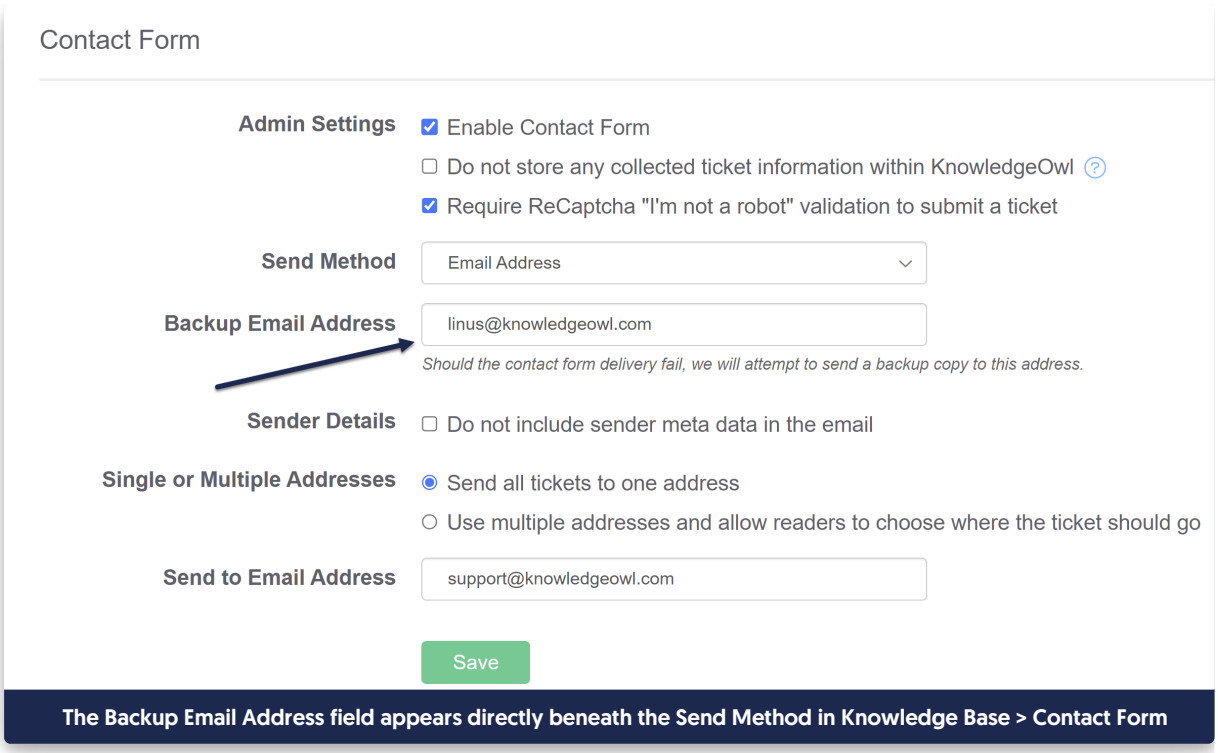
Backup Email Address

If we detect any problems with your Send to Email Address, we will also send your contact form submissions to your Backup Email Address, so it's a great idea to add one!

The Backup Email Address should be different from your Send to Email Address.

To configure a Backup Email Address:

1. Select **Contact Form** from the lefthand navigation menu.
2. Add the email address you'd like to use as a **Backup Email Address**:

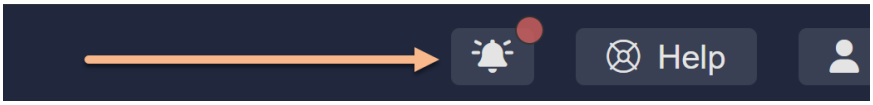


The Backup Email Address field appears directly beneath the Send Method in Knowledge Base > Contact Form

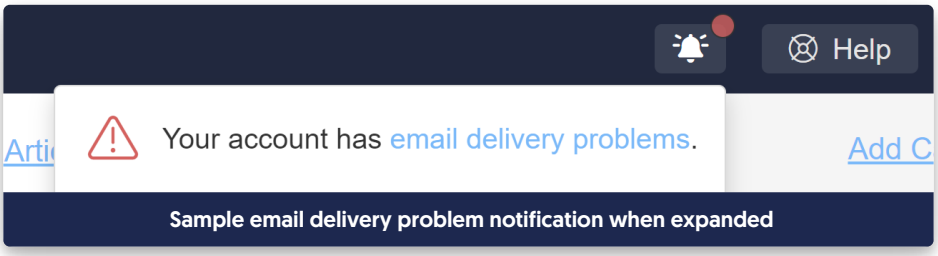
3. Be sure to **Save**.

Email delivery issue warning

If we have issues delivering contact form submission emails, a red notification dot appears over the notification bell in the site banner:



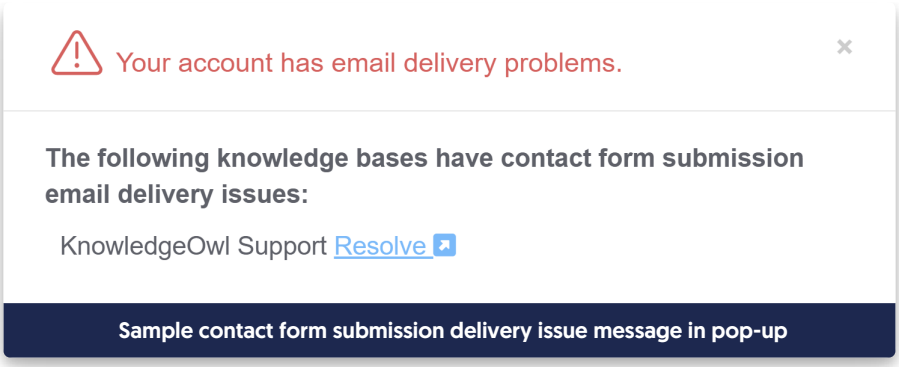
If you click on the notification bell icon, a message that your account has email delivery problems will appear:



Sample email delivery problem notification when expanded

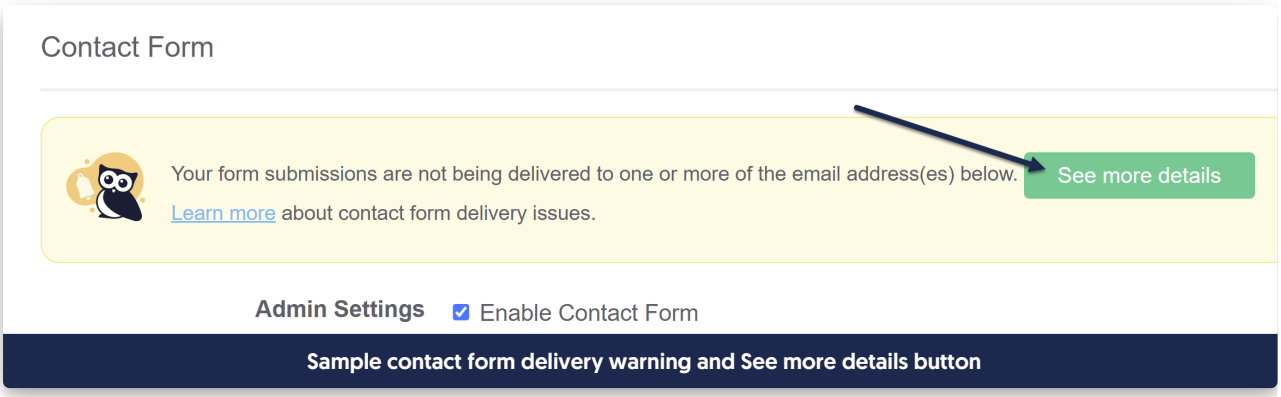
Click the hyperlinked email delivery problems text to open a pop-up that tells you what delivery issues there are.

When contact form submission delivery issues exist, we'll identify that and display the name of the knowledge base that's having issues. Click the Resolve link next to the knowledge base name to jump directly to that knowledge base's Contact Form.



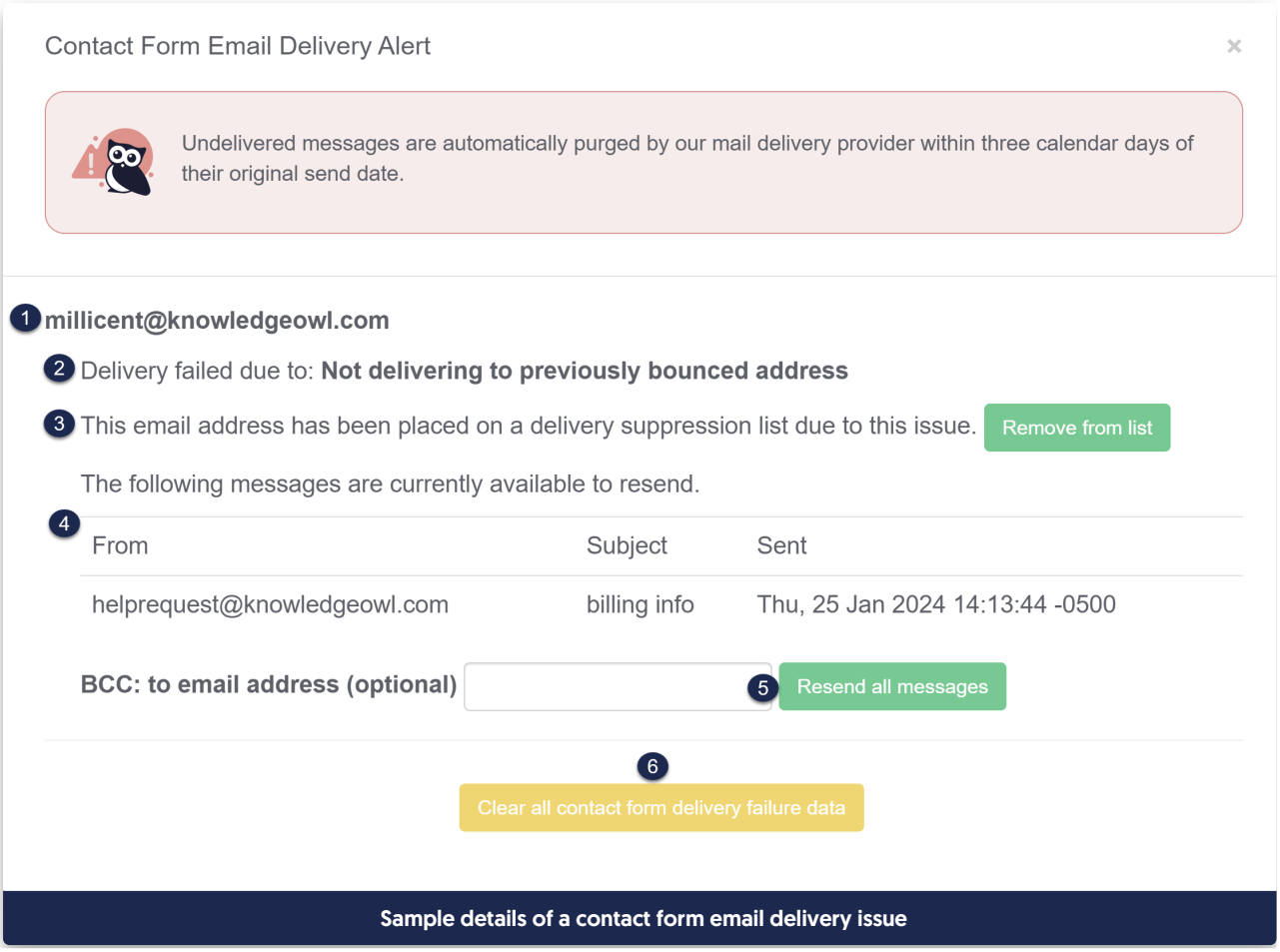
Sample contact form submission delivery issue message in pop-up

When there are delivery issues, the Contact Form page displays a warning at the top with a See more details button. Click that button to view the full details for the issue:



Sample contact form delivery warning and See more details button

A pop-up will open to show more details. Depending on your contact form issues, the number of messages available, etc., the exact details of this pop-up will vary, but it should look generally like this:



Sample details of a contact form email delivery issue

1. The **email address** we're having trouble sending to. If you're using a single Send to Email Address, this will be that email. If you're using Multiple Email Addresses, you may see one or more email addresses listed here.

2. **Delivery failure reason**: Our mail delivery provider captures an error code or reason why the emails are failing. We'll display the message exactly as we've received it.

    a. If you're just starting to use the contact form, the most common errors here are a typo in the email address or using an email address that hasn't been fully configured to receive email.

    b. If your contact form was fully functioning and stopped working, you're more likely to see a detailed error code or more verbose reason why something may not be working. We recommend sending a test email to the email address in question to see if you're still having delivery issues. If you are, reach out to your email administrator to get them resolved (you can share the error code or message displayed here).

3. **Remove from list** *(Only displayed when applicable):* If your issue caused our mail delivery provider to add your contact form email address to a suppression list, we'll display a statement to this effect along with a **Remove from list** button.

    If you see this option, you **must** click the Remove from list button to start receiving email again, even if you've resolved other issues!

4. **Messages available to resend** *(Only displayed when applicable):* Our mail delivery provider stores messages for up to 3 calendar days. If we have contact form submissions sent within the last 3 days that were impacted by this delivery issue, we'll display them here.

    a. Any messages displayed here have already been sent to the Backup Email Address (if one exists).

5. **Resend all messages** *(Only displayed when applicable):* If you have messages displayed, you can choose to Resend all messages. This will resend to the existing email address(es) we have for the Send To Email Address.

    a. If that address is still experiencing issues, we recommend using the **BCC: to email address** option to re-send the messages to a different email address.

    b. If you don't see this section, it means that we have no messages available to resend from within the last 3 days.

6. Once you've finished troubleshooting and resending messages, use the **Clear all contact form delivery failure data** button. This basically resets the contact form and will:

    a. Clear out any messages available to resend. If you have any messages available for resend, you'll get a confirmation message warning you about this!

    b. Remove the warning from within **Knowledge Base > Contact Form**.

    c. Remove the warning banner from within the app.



If you don't resolve the issue with this email address but clear the warning anyway, the warning will reappear the next time a reader submits a question to your contact form.

No warning displays in your live knowledge base, and your readers will be able to submit to your contact form despite any delivery issues, so we recommend resolving these issues quickly or checking the messages for resend until you can things resolved!

Custom fields

Last Modified on 05/29/2024 5:28 pm EDT

By default, KnowledgeOwl will ask for this information in the contact form:

- Subject
- Body/more detailed explanation
- Name
- Email
- File attachments

In some cases, you may want to ask your readers for a little more information. This might be things like their phone number, what product or product version they're writing in about, their department, their company, or their favorite owl species.

Depending on your **Send Method**, you may be able to add custom fields to your contact form to capture this information:

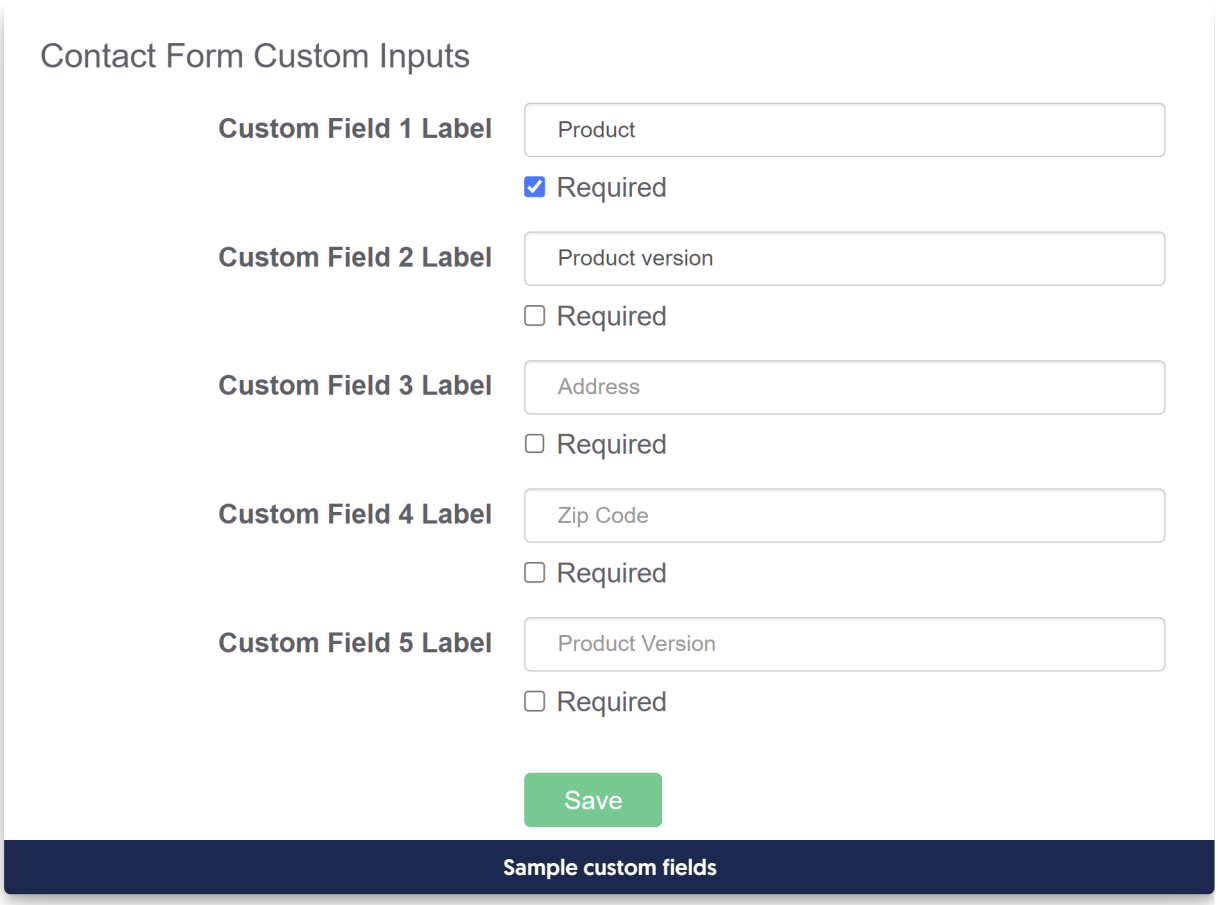
- **Email**: Add up to 5 custom fields. See below for more information on custom fields, or Create Tickets from Customers in your Help Desk or CRM on setting up the contact form with this method.
- **Zendesk**: Add up to 7 custom fields, but you'll need to map these to appropriate fields in Zendesk. See Create Zendesk Tickets for more information.
- **Freshdesk**: No custom fields supported. See Create Freshdesk Tickets for more information.

Custom fields display between the Email input and File attachment sections of the contact form.

Contact form custom fields will not display in the Contextual Help Widget (2.0).

To add custom fields to your contact form:

1. Go to **Knowledge Base > Contact Form**.
2. Scroll to the **Contact Form Custom Inputs** section.
3. Add the **Label** you want each custom field to have. This is the label that will be displayed in the contact form to your readers.
4. If you want your reader to have to add a value to the custom field before they can submit the form, check the **Required** box underneath the custom field's label.
5. Repeat with any additional custom fields you'd like to add. For example, here we've added a required custom field for Product and an optional field for Product version:



6. **Be sure to Save your changes.**

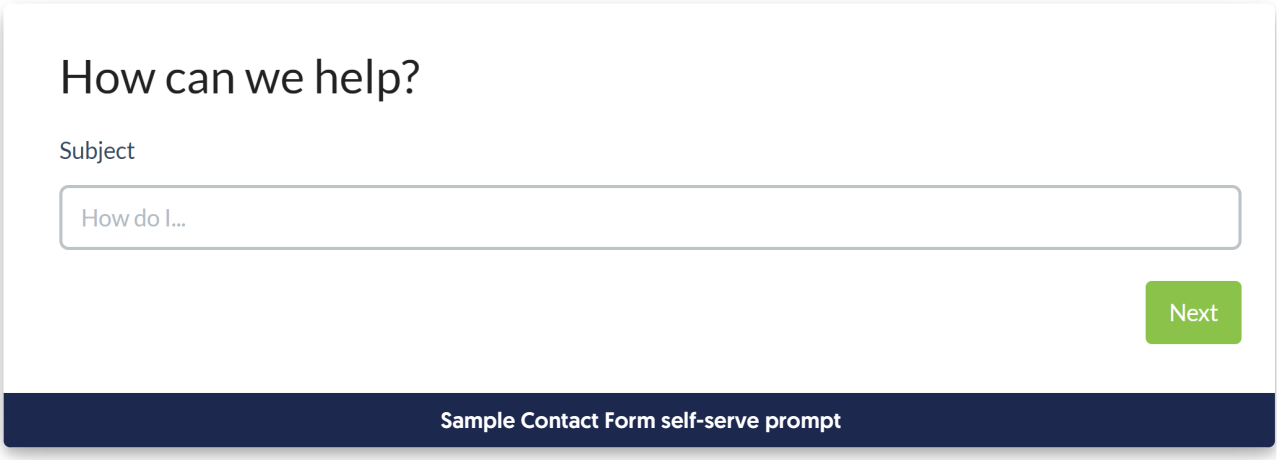
These fields will display in the contact form below the email field and above the file attachment section:



Bypass contact form self-serve

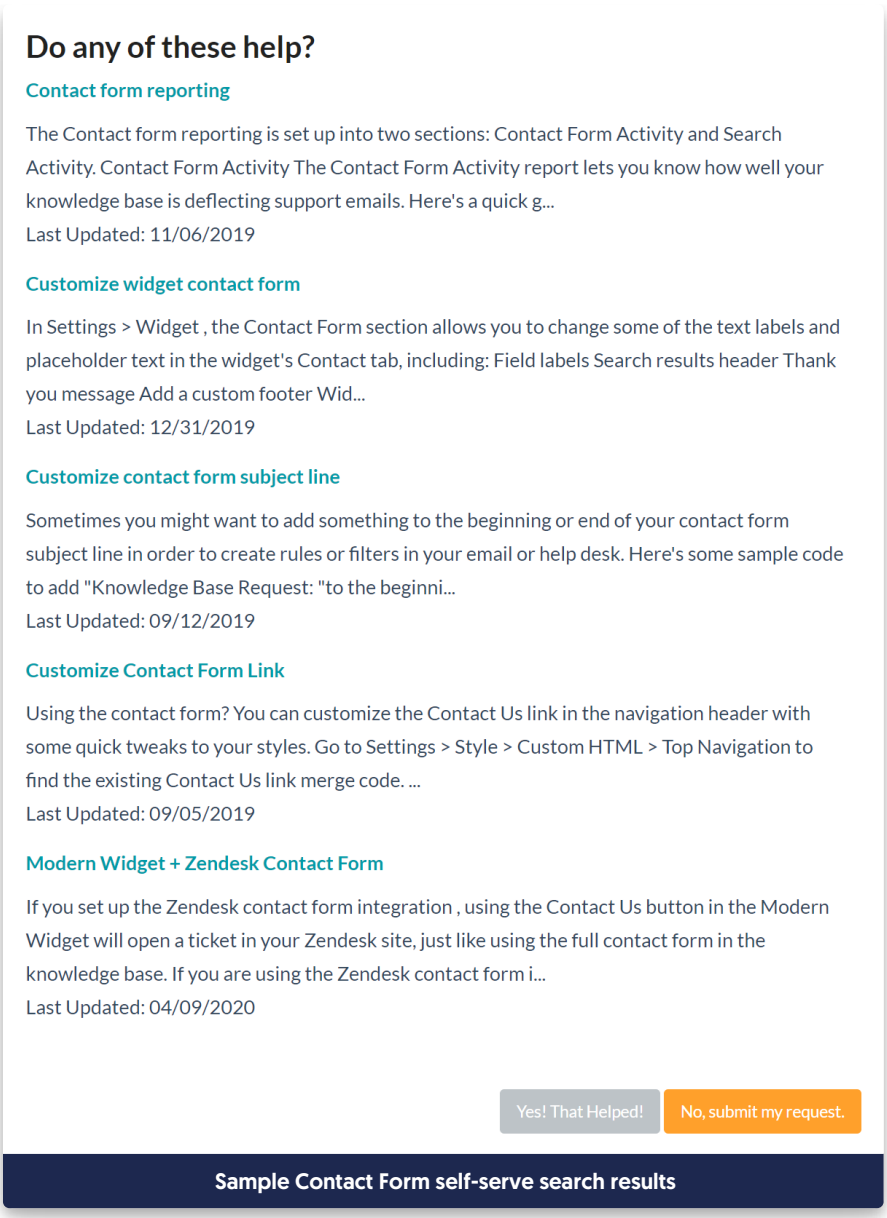
Last Modified on 05/29/2024 5:27 pm EDT

Our full contact form template directs your readers to a self-serve search like this:



Sample Contact Form self-serve prompt

Readers can search the topic they want help with, and the form will return a list of possible resources.



Sample Contact Form self-serve search results

Only once a reader clicks "No, submit my request." can they get to the actual contact form.

This is great for knowledge bases that provide support and you're trying to encourage self-service before ticket creation.

But in some knowledge bases, it makes more sense to have the Contact Us link take you straight to the contact form itself, bypassing the self-service piece entirely.

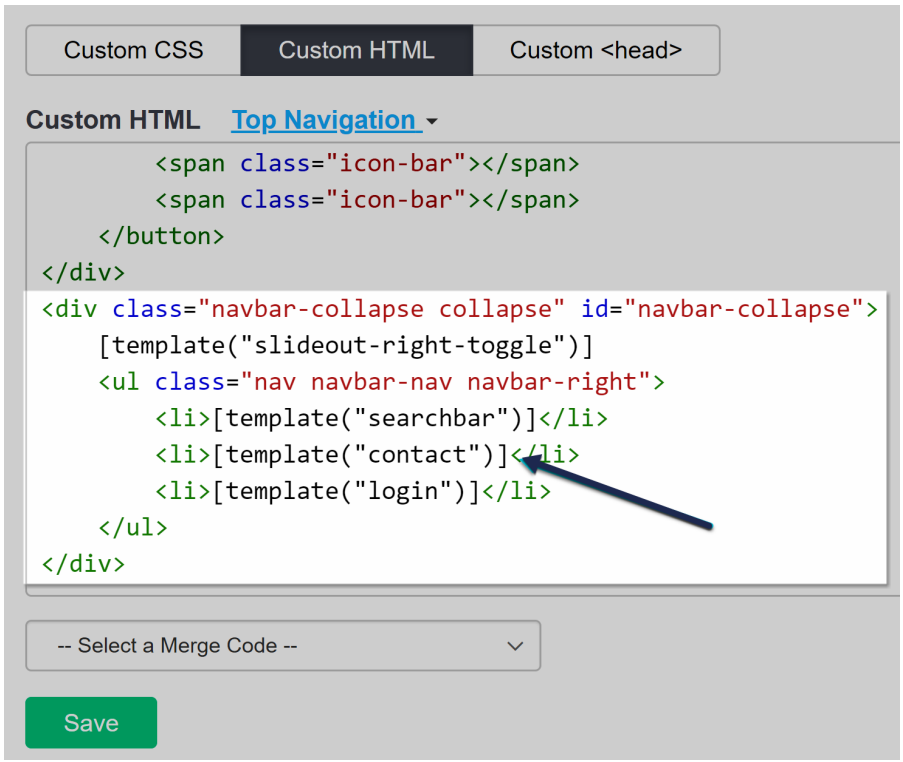
If you skip the self-service questions, the Contact Form Reporting will capture these hits, but they won't appear in the Search Phrase list, since we can't detect deflection if there is no point for deflection.

If you'd like to make that change:

1. **Go to Settings > Style.**
2. **Below the preview pane, click on Custom HTML.**

3. Select **Top Navigation** from the Custom HTML dropdown.

4. Look for the navbar-collapse div that contains your navbar-right, and within that, look for the contact template:



5. Copy the code below and paste it to replace the template("contact") merge code:

```
<a class="hg-header-link" href="https://support.knowledgeowl.com/help/contact-feedback">Contact Us</a>
```

   Your knowledge base might use the **/home/** or **/docs/** root path instead of /help/. If it does, replace **/help/** in the href to match what your knowledge base uses.

6. You can also adjust the text to say something besides "Contact Us", if you'd like.

7. With the change in place, click **Save**.

Here's a sample with this change made, using the /help/ root path:


Custom CSS
Custom HTML
Custom <head>
Custom HTML
Top Navigation

</button>

[template("slideout-right-toggle")]
<ul class="nav navbar-nav navbar-right">
[template("searchbar")]
Contact Us
[template("login")]

-- Select a Merge Code --
Save
Sample with /help/ root path and Contact Us as text

Open the contact form with certain details filled in

Last Modified on 05/29/2024 5:27 pm EDT

The contact form generally opens with most fields empty. If you require readers to login, the reader's name and email address will be automatically filled in, but otherwise, all fields are empty.

But what if you'd like to be able to insert a link to your contact form that will prepopulate a few fields, like the contact form's subject or the submitter's name? You can pass these variables in as part of a link you're providing.

Here are the URL parameters you can use:

- `?subject=` will add text to Subject
- `?body=` will add text to Details
- `?name=` will add text to Your Name
- `?email=` will add text to Your Email

To create a link using one of these parameters, you'll use the base URL of your knowledge base (which may end in /help, /home, or /docs) + /contact-feedback

> Example: https://support.knowledgeowl.com/help/contact-feedback

Add the first parameter after that with a question mark before it. Add any additional parameters with an & before them.

> Example: https://support.knowledgeowl.com/help/contact-feedback?subject=Beta%20testing%20feedback (Will open the contact form with "Beta testing feedback" as the subject)

To include text with spaces or special characters, you'll need to encode those characters for the URL. You can see this in the example above where each space is a %20. If you're not familiar with URL encoding, don't worry! You can put the text you want encoded into this tool: https://www.urlencoder.org/ click Encode, and copy what it gives you.

Here's a much longer example using all the parameters:

https://support.knowledgeowl.com/help/contact-feedback?subject=This%20form%20was%20pre-filled&body=As%20an%20example&name=Linus%20Owl&email=linus@knowledgeowl.com



Avoid long **body** text sent via the URL. Including more than a few words here may throw an error, especially if you're populating some of the other fields.

To use links like this within articles in KnowledgeOwl, create the full URL with the parameters you need, use the Insert Link option, and use that URL as the URL for the link.

Use cases

Linus likes using these parameters to make the contact form more convenient for his readers: if he knows why someone's contacting us (by clicking a link), it can be helpful to save them some time by prepopulating the subject and details with relevant information.

Example: Insert a link into your documentation that reads "Contact us to upgrade your account", and pass "Account Upgrade" in as the subject line.

It can also be useful if you're referencing the contact form in your own website or application, where you might already have customer name and email information. You can pass that name and email over as part of the link they're clicking, so they don't have to fill out those fields.

Add template text to the start or end of the contact form's subject

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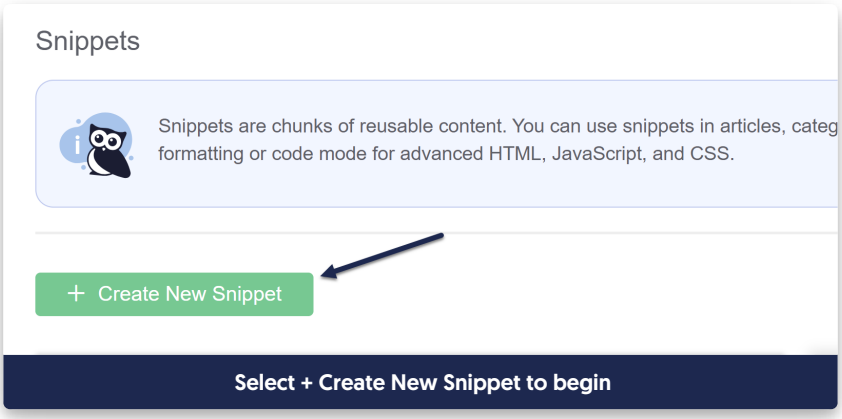
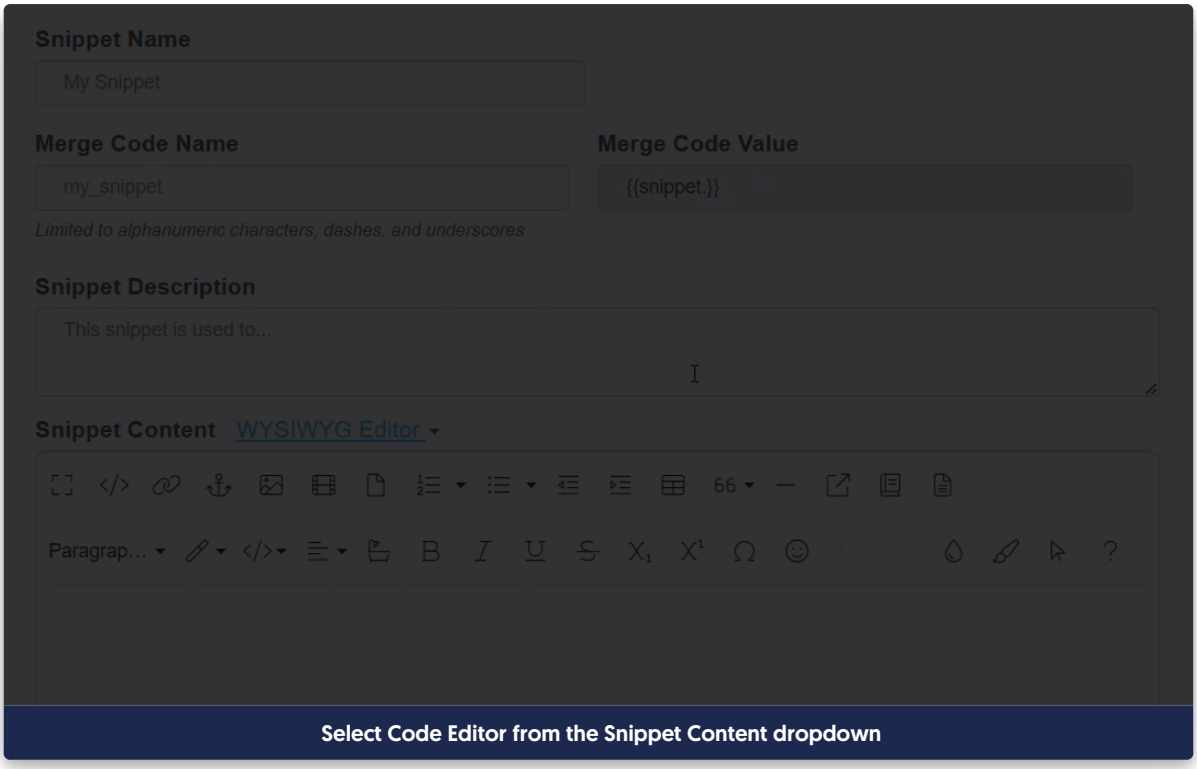
Sometimes you might want to add something to the beginning or end of your contact form subject line in order to create rules or filters in your email or help desk. This text is added to the beginning or end of the subject line after a reader clicks submit, so there's no chance that they could delete it or change it. They never know it's there, and you can set up email or help desk queue rules and filters to help process these submissions.

We like to use a code snippet added to the the Custom HTML to solve this problem. To set it up:

1. Go to **Library > Snippets.**
2. Select the **+ Create New Snippet** button.



3. Give your snippet a **Name**. This is how the snippet will appear in the Snippet Library and in snippet look-ups. The Merge Code Name will auto-generate from the Snippet Name, but you can edit it if you'd like to. For example: Contact Form Subject.
4. Give your snippet a **Description**. This will help describe what your snippet does to other authors (and may help remind you if you forget!) For example: Add "Knowledge Base Request: " to the start of all contact form submissions.
5. Click the dropdown next to Snippet Content to select the Code Editor.

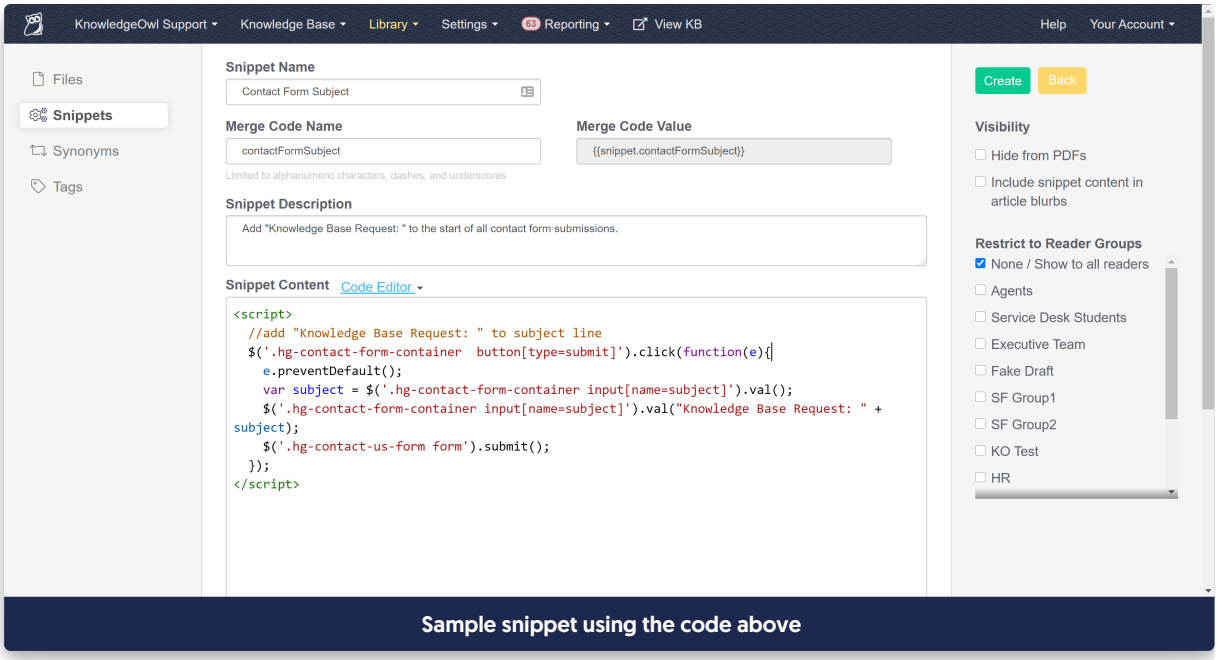


Select Code Editor from the Snippet Content dropdown

6. **Copy the code below and paste it into the Code Editor. The code below will add "Knowledge Base Request: " to the subject line of all contact form submissions. You can edit that text in row 6 to be what you'd like to use.**

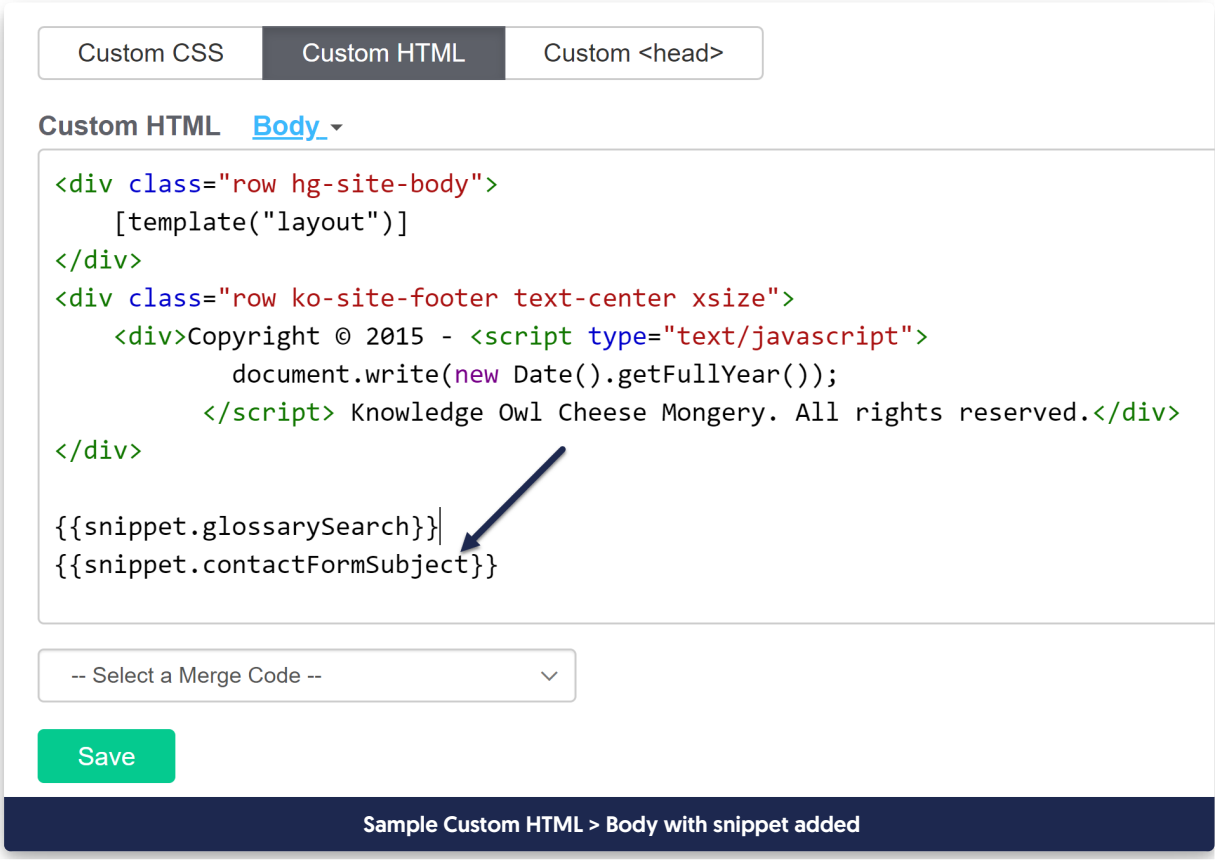
```
<script>
 //add "Knowledge Base Request: " to subject line
 $('.hg-contact-form-container  button[type=submit]').click(function(e){
  e.preventDefault();
  var subject = $('.hg-contact-form-container input[name=subject]').val();
  $('.hg-contact-form-container input[name=subject]').val("Knowledge Base Request: " + subject);
  $('.hg-contact-us-form form').submit();
 });
</script>
```

7. **Here's what a finished snippet might look like:**



Sample snippet using the code above

8. Click the **Create** button.
9. Copy the snippet's Merge Code Value. (In our example, it's {{snippet.contactFormSubject}}).
10. Go to **Settings > Style**.
11. Click the **Custom HTML** tab below the preview pane.
12. Be sure the dropdown is set to **Body**.
13. Paste your merge code anywhere into the Body.



Sample Custom HTML > Body with snippet added

14. **Save** your changes.

Customize the subject line order

The code sample will put the text you have into the start of the contact form's subject. If you'd rather put it into the end, adjust the script so that subject + comes before the text string, for example:

```
<script>
 //add "Knowledge Base Request: " to subject line
 $('.hg-contact-form-container  button[type=submit]').click(function(e){
   e.preventDefault();
   var subject = $('.hg-contact-form-container input[name=subject]').val();
   $('.hg-contact-form-container input[name=subject]').val(subject + " - Knowledge Base Request");
   $('.hg-contact-us-form form').submit();
 });
</script>
```

Fix error for site owner on Contact Form

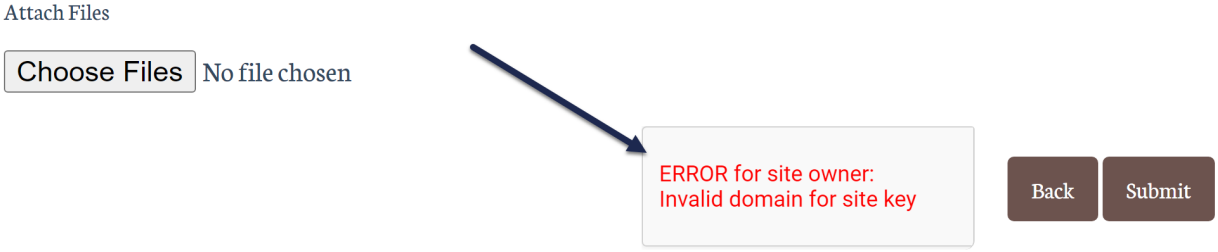
Last Modified on 05/29/2024 5:28 pm EDT

Error text

ERROR for site owner: Invalid domain for site key

Error location

This error may show up on your live Contact Form just before someone goes to submit to the form. It usually presents right next to the Back and Submit buttons:



Cause

This error is a reCAPTCHA error.

It generally occurs because you have set up a private domain in KnowledgeOwl, have set your Contact Form to require reCAPTCHA, but have not properly added a reCAPTCHA key and secret to Settings > Basic.

Solution

To remove this error, follow the instructions to add reCAPTCHA in Add reCAPTCHA.

All customers with this error will need to add a V2 reCAPTCHA key and secret. If you're using Widget 2.0, you'll also need to add a V3 reCAPTCHA key and secret. See the reCAPTCHA instructions for more details!

Manage Articles overview

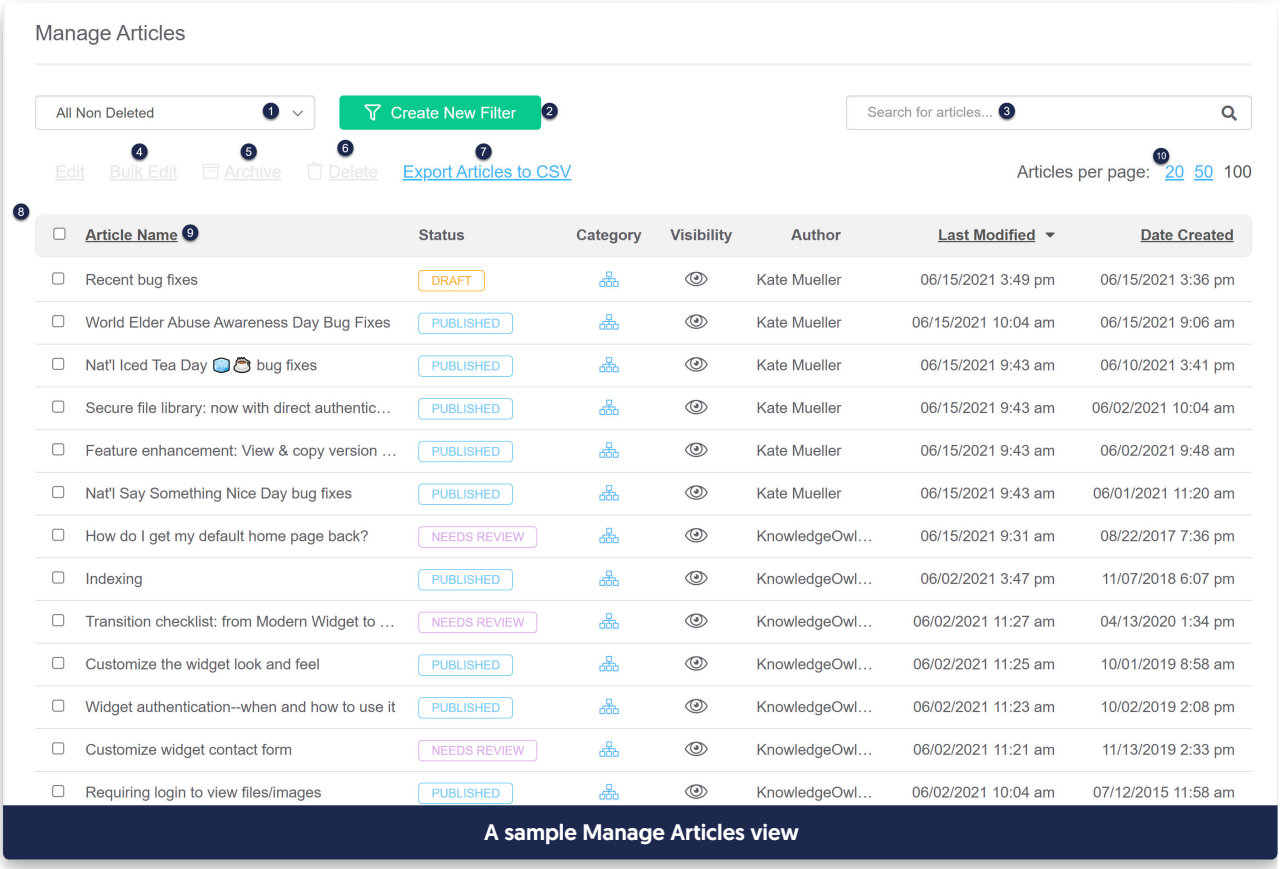
Last Modified on 05/29/2024 5:28 pm EDT

Manage Articles is designed to give you a view of all your articles across all categories and publishing statuses.

You can sort and filter it, and you can export any view in Manage Articles to CSV.

From here, you can open individual articles for editing, delete articles individually or in bulk, and edit articles in bulk.

Let's take a quick look to get oriented. To access your Manage Articles dashboard, in the top section of the lefthand navigation, select Manage.



A sample Manage Articles view

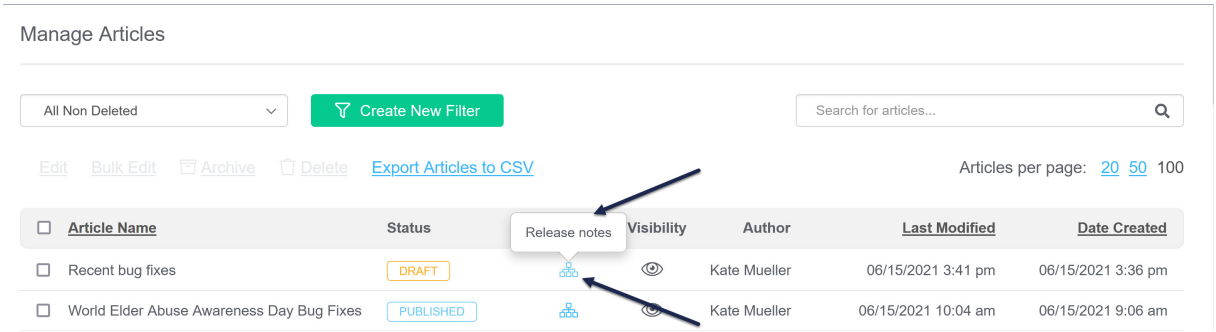
Here are the main elements and controls:

1. **The filter dropdown at the top allows you to select a filter of articles to display. You can use the dropdown here to select standard filters or any of the custom filters you've created.**

2. **Use the Create New Filter button to create a new filter to be added to the filter selector.**

3. **You can search the current article list using the search box in the upper right. This will further refine the displayed article list.**

4. Once you select one or more articles using the checkboxes, you can bulk edit the selected articles.
5. Once you select one or more articles using the checkboxes, you can bulk archive the selected articles.
6. Once you select one or more articles using the checkboxes, you can bulk delete the selected articles.
7. You can **Export Articles to CSV**. This will export all pages of the current article list to a CSV.
8. The article list will display all articles that meet the selected filter's criteria. You can click on any article here to open it in edit mode in a new tab. You can hover over the category icon to see the category an article is located within.



9. Clicking any of the underlined column headings will sort the article list by that column:
    - Article Name (sort this from A to Z or Z to A)
    - Last Modified (sorted by date - newest to oldest or oldest to newest)
    - Date Created (sorted by date - newest to oldest or oldest to newest)
10. By default, Manage Articles will display 20 articles at a time. You can toggle this to 50 or 100.

Use standard Manage filters

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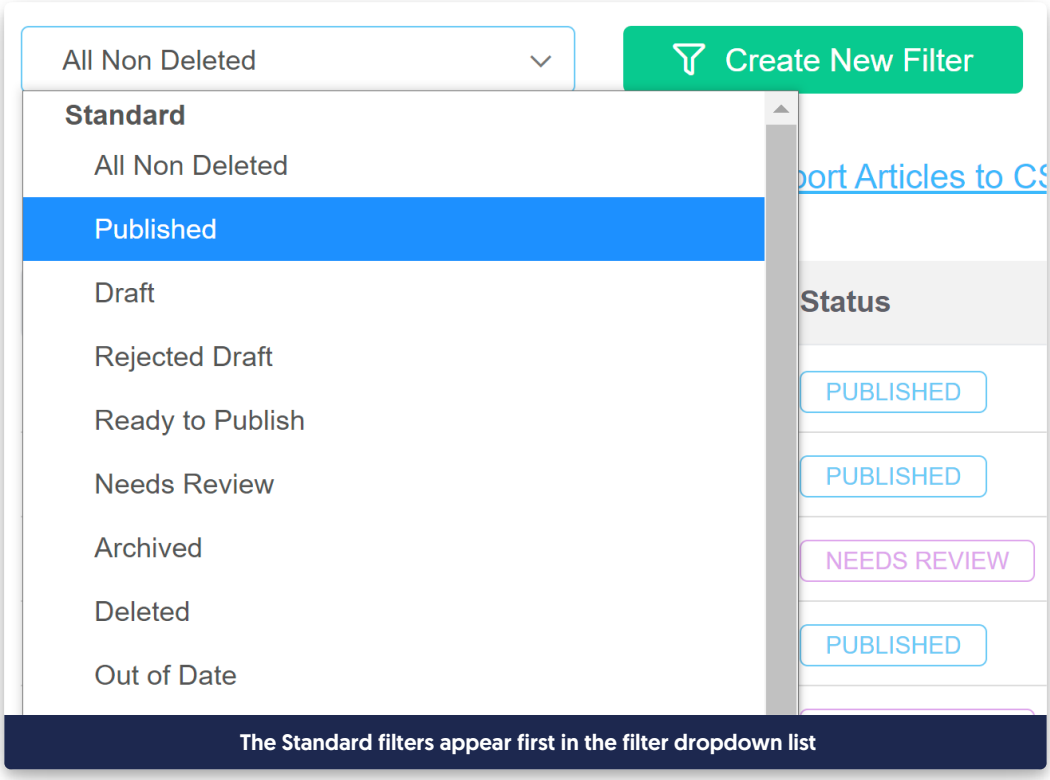
Manage Articles includes eight standard filters, which are generally based on Publishing Status:

- **All Non-Deleted:** displays all articles without a Deleted status
- **Published:** displays all articles with a Published status
- **Draft:** displays all articles with a Draft status
- **Rejected Draft:** displays all articles with a Rejected Draft status
- **Ready to Publish:** displays all articles with a Ready to Publish status
- **Needs Review:** displays all articles with a Needs Review status
- **Archived:** displays all articles with an Archived status
- **Deleted:** displays all articles with a Deleted status in your knowledge base
- **Out of Date:** displays all Published or Needs Review articles that haven't been modified in the last six months

To apply one of these filters:

1. In the top section of the lefthand navigation, select **Manage**.
2. Click the filter selector and click the filter you'd like applied.



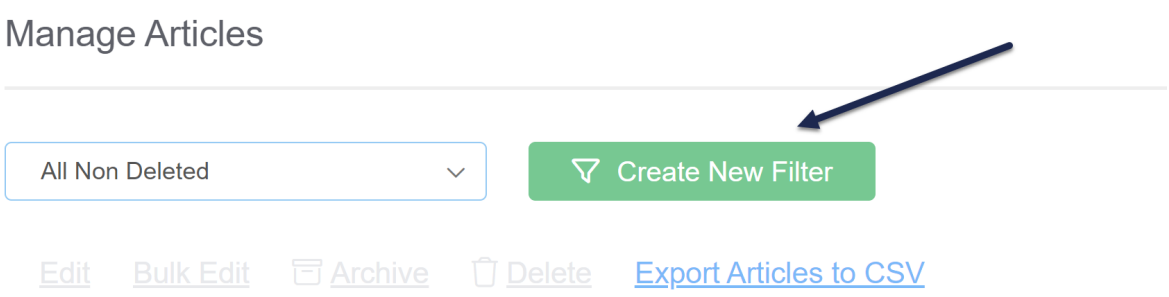
The Standard filters appear first in the filter dropdown list

Create a custom Manage filter

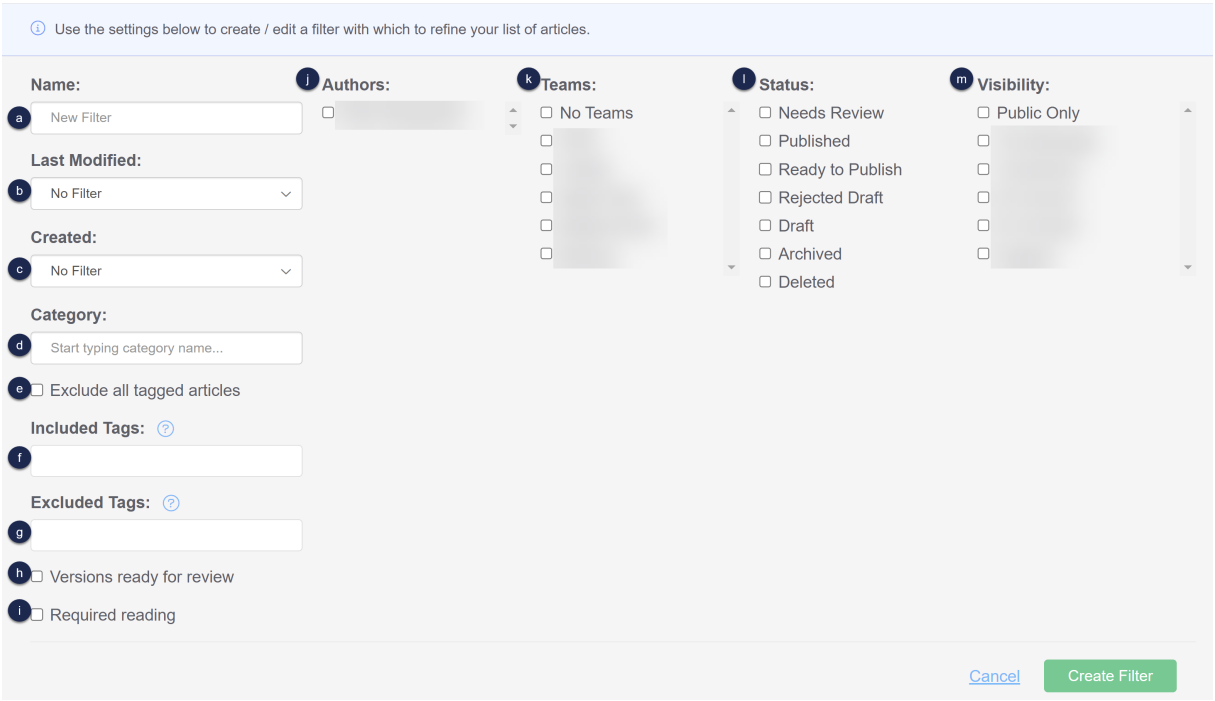
Last Modified on 05/29/2024 5:28 pm EDT

In addition to the Standard Manage filters, you can also create your own custom Manage filters. To do so:

1. In the top section of the lefthand navigation, select **Manage**.
2. Select the **Create New Filter** button next to the filter selector.



3. This will open a pop-up where you can select the filter parameters you'd like to use:



   a. The **Name** you enter is the label that will appear in the filter selector dropdown.

   b. Use the **Last Modified** filter to display articles last edited or modified within a particular time range.

   c. Use the **Created** filter to display articles created within a particular time range.

   d. Display articles from a specific category only using the **Category** filter. This will include all articles

directly within the category or within any subcategories of that category.

e. Display articles that don't have any tags by checking the **Exclude all tagged articles** box. This is a great way to identify articles that don't have any tags! Once you check this box, the Included Tags and Excluded tags filters disappear.

f. Display articles that have specific tags using the **Included Tags** filter. These work great if you've used concepts, subject areas, etc., as article tags.

g. Display articles that do not have specific tags by adding those tags to the **Excluded Tags** filter. These work great if you want to find all articles that don't have a "version 1.1" tag, for example.

h. If you are using article versions, you can check the **Versions ready for review** checkbox to show only articles that have versions with a ready for review status.

i. If you are using Required Reading, check the **Required reading** checkbox to show only articles that are marked as required.

j. By default, the filter will include articles authored by anyone. You can limit it to articles authored by a specific person or people using the **Authors** checkboxes.

k. By default, the filter will include articles restricted to specific author teams or no author teams. You can limit it to articles restricted to specific author teams using the **Teams** checkboxes.

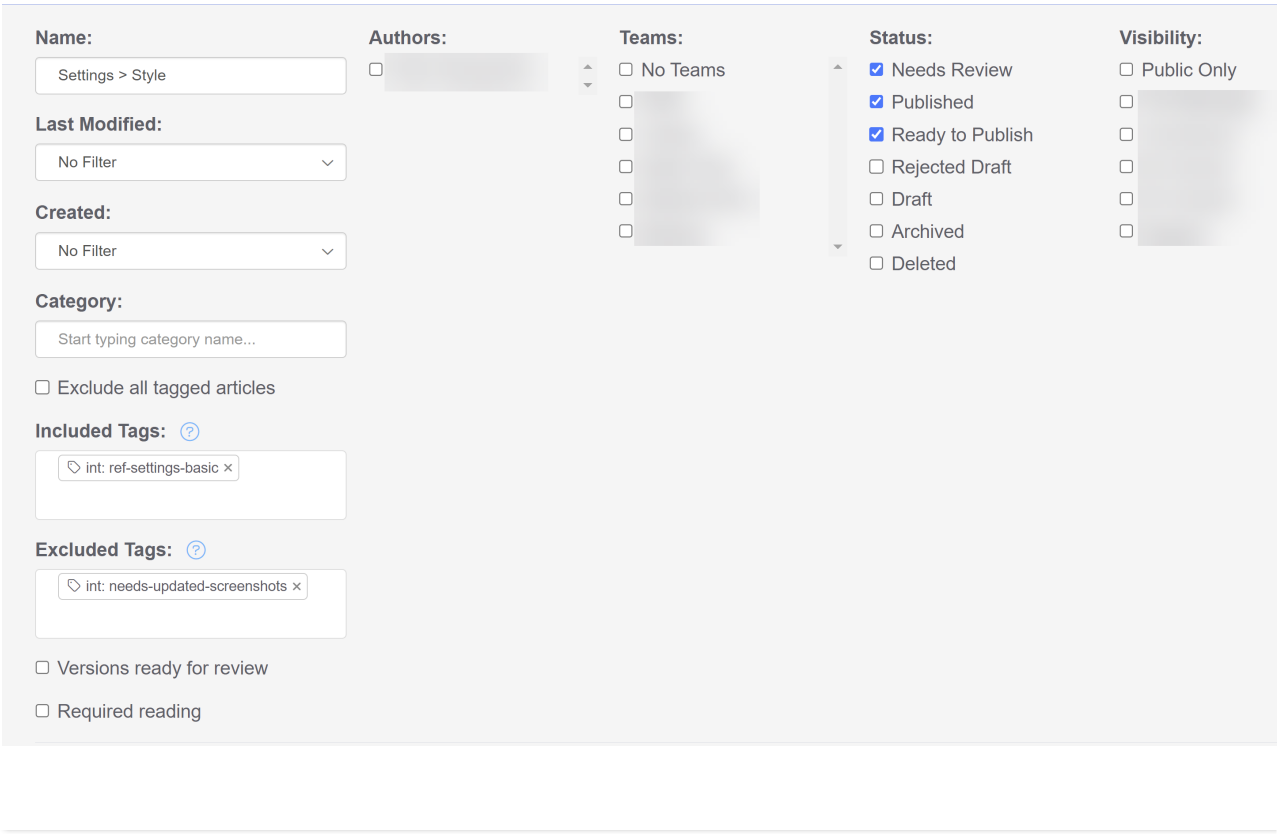
l. By default, the filter will include all articles regardless of Publishing Status. You can limit it to specific publishing status(es) using the **Status** checkboxes.

m. By default, the filter will include all articles available to all readers and any reader group. You can limit it to articles viewable to only specific reader groups using the **Visibility** checkboxes.

    i. Public Only will show only articles that have no reader group restrictions whatsoever.

4. Once you have made your selections, select the **Create Filter** button in the lower right to create the filter and view its results.

Here is a sample custom filter called Settings > Style which will produce a list of all Published, Needs Review, and Ready to Publish articles that have been assigned the "int: ref-settings-basic" tag and do not have the "int: needs-updated-screenshots" tag:


Name:
Settings > Style
Last Modified:
No Filter
Created:
No Filter
Category:
Start typing category name...
Exclude all tagged articles
Included Tags:
int: ref-settings-basic ×
Excluded Tags:
int: needs-updated-screenshots ×
Versions ready for review
Required reading
Authors:
Teams:
No Teams
Status:
Needs Review
Published
Ready to Publish
Rejected Draft
Draft
Archived
Deleted
Visibility:
Public Only

Edit a custom Manage filter

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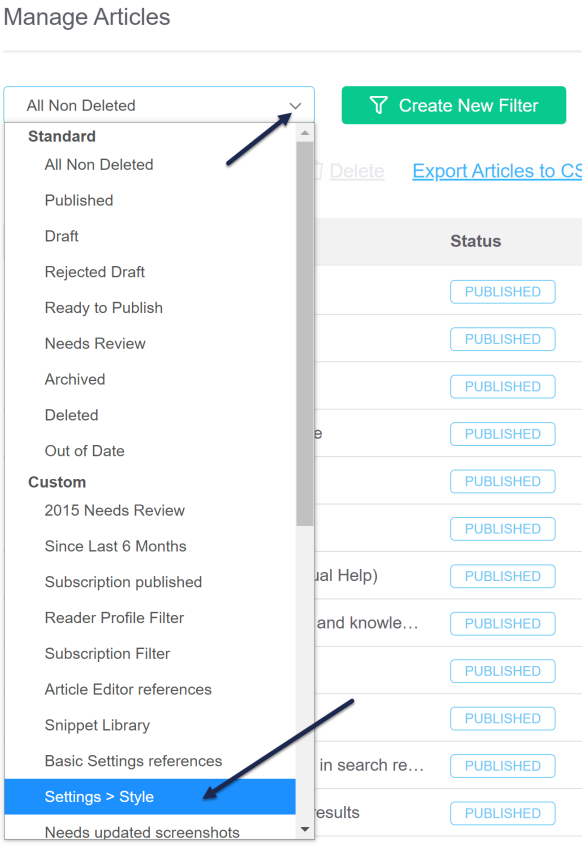
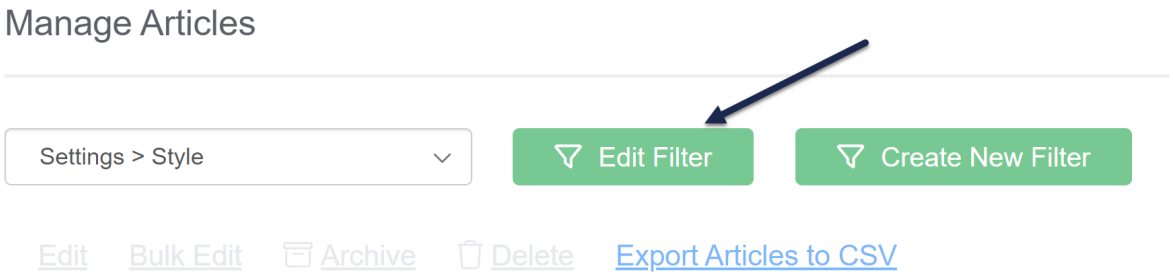
To view the details of an existing custom filter or edit it:

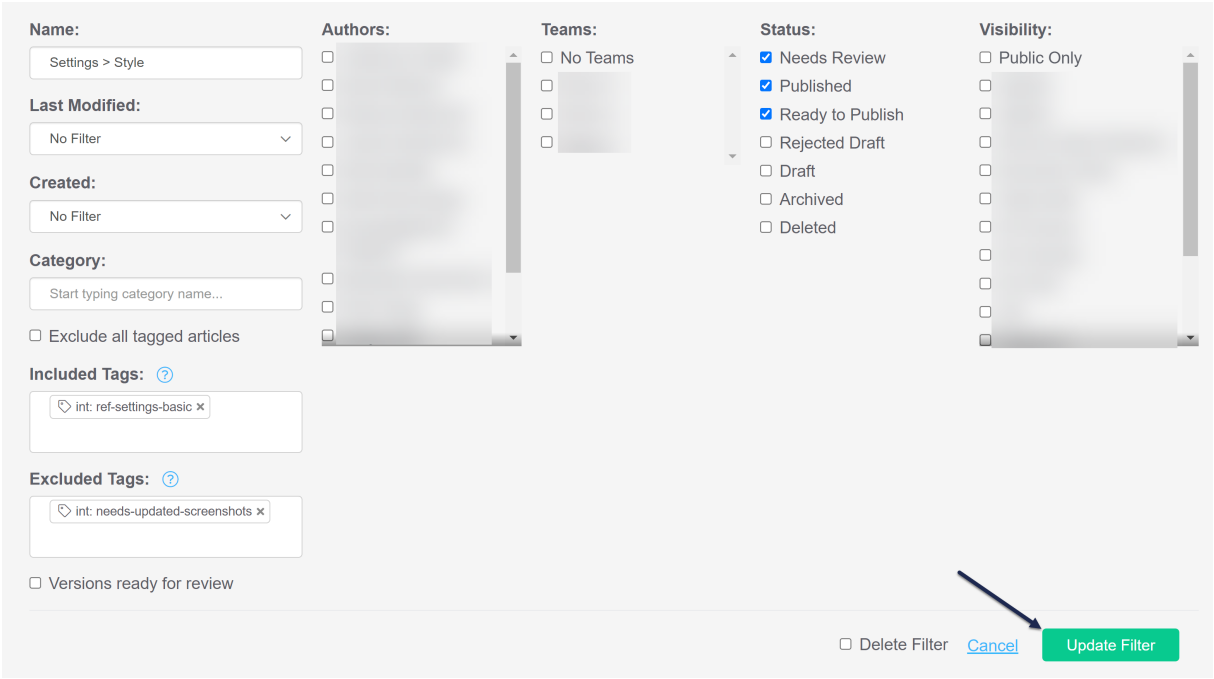
1. **In the top section of the lefthand navigation, select Manage.**
2. **Select the filter from the filter dropdown.**



3. **Select the Edit Filter button that appears to the right of the filter dropdown.**



4. **Make the changes in the filter's details and then select the Update Filter button.**


Name:
Settings > Style
Last Modified:
No Filter
Created:
No Filter
Category:
Start typing category name...
Exclude all tagged articles
Included Tags:
int: ref-settings-basic
Excluded Tags:
int: needs-updated-screenshots
Versions ready for review
Authors:
Teams:
No Teams
Status:
Needs Review
Published
Ready to Publish
Rejected Draft
Draft
Archived
Deleted
Visibility:
Public Only
Delete Filter
Cancel
Update Filter

Included Tags vs. Excluded Tags

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When you're creating or editing a Manage filter, there are two options for tag filters:

- Included Tags
- Excluded Tags

The **Included Tags** filter makes sure that the filter returns only articles that **have** (or include) the selected tags. For example, if I add the Included Tag for "subscriptions", I'll get a list of all articles with the subscriptions tag.

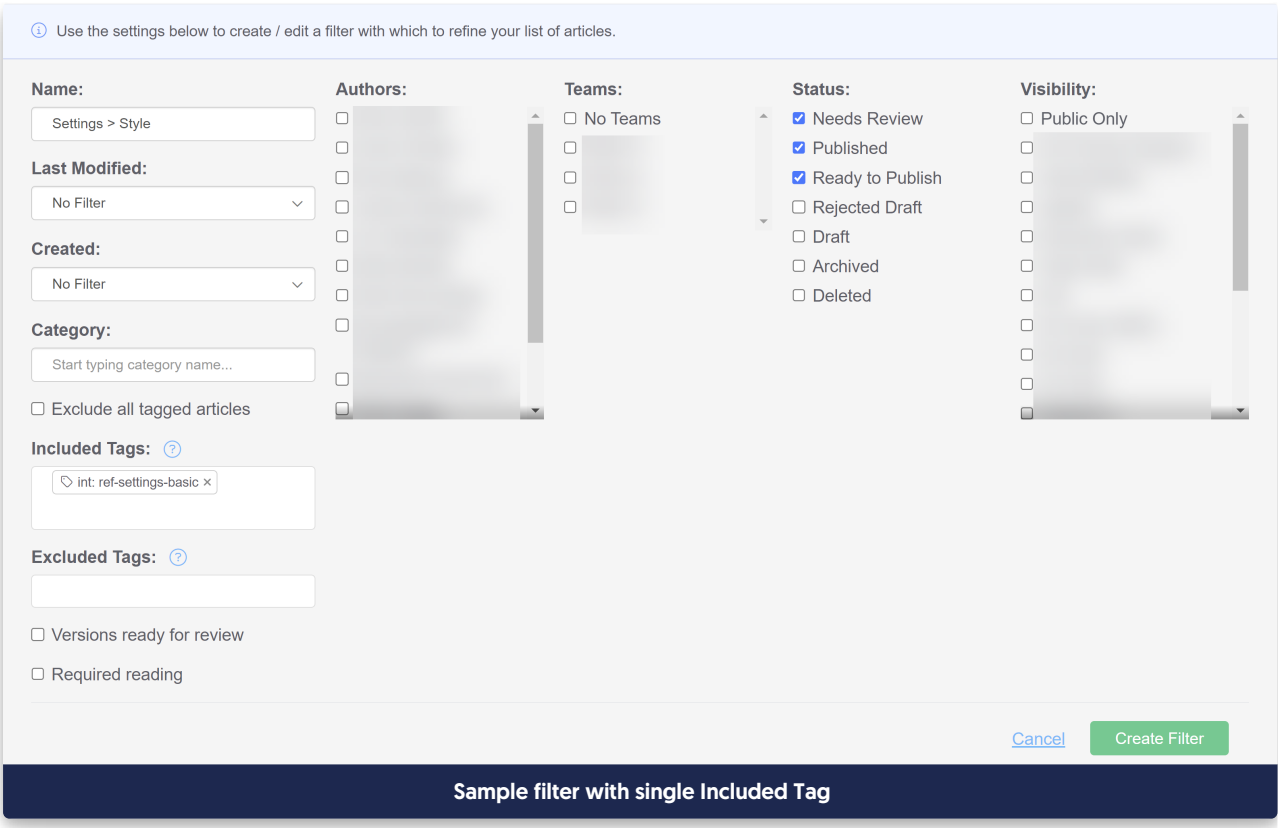
The **Excluded Tags** filter will remove (or exclude) articles that have the selected tags. For example, if I add the Excluded Tag of "settings", I will get all articles that do not have the settings tag.

For both filters, multiple tags are treated as "or" filters:

- 2 or more tags in **Included Tags** will give you all articles that have any one of the tags. For example, if I add Included Tags for "subscriptions" and "settings", I'll get all articles that have either (or both) of those tags.
- 2 or more tags in **Excluded Tags** will exclude articles that have any one of the tags. For example, if I add Excluded Tags for "needs-updated-screenshots" and "needs content review", I will get all articles that don't have either of those tags.

These two filters are incredibly powerful if you use them together.

For example, let's say that we've made updates to our Basic Settings page. We have a tag in our content for that page ("int: ref-settings-basic"), so I can start off my filter by adding that tag as an Included Tag, to get a list of all articles that reference this page:

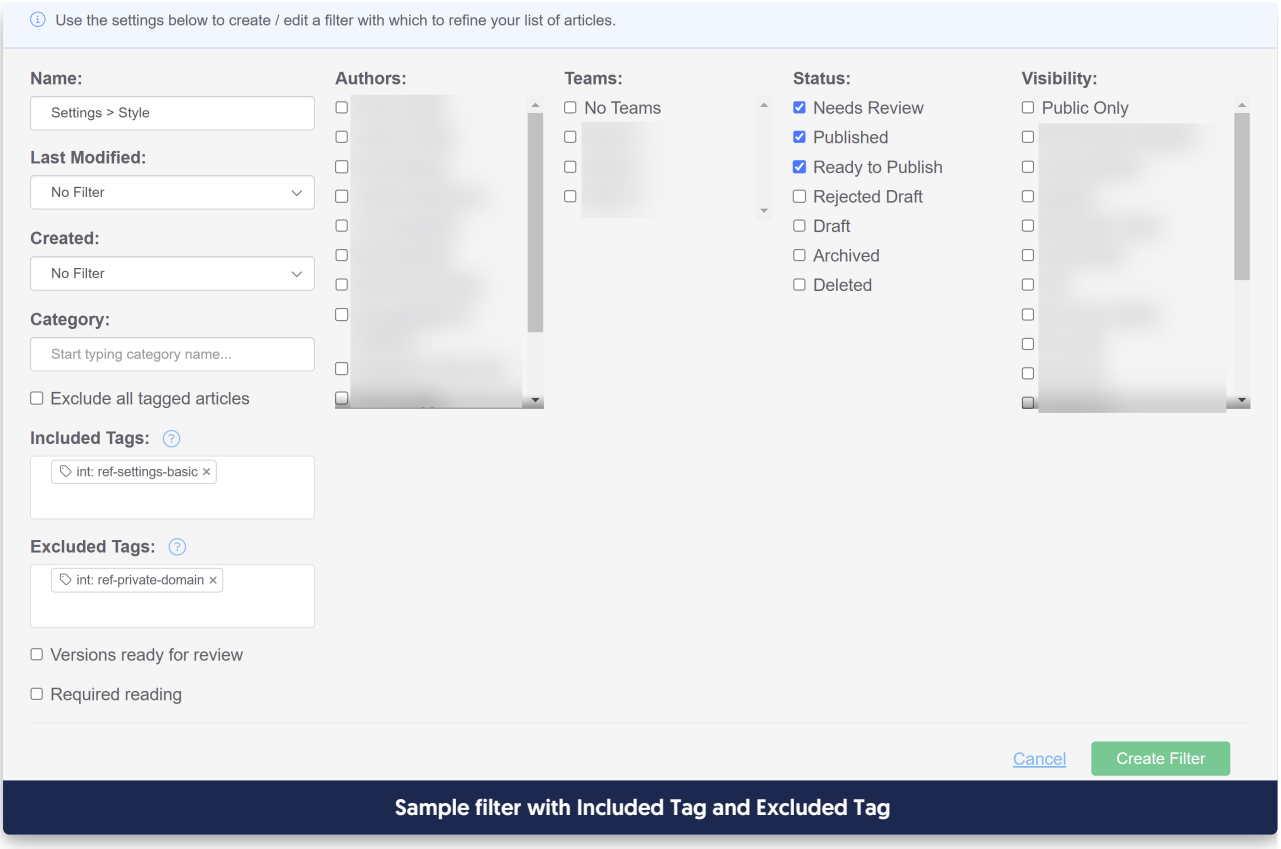


Sample filter with single Included Tag

This filter basically says: pull all articles with the "int: ref-settings-basic" tag with a status of Needs Review, Published, or Ready to Publish.

It returns 23 articles.

A lot of our content on Basic Settings talks about setting up a private domain, which we use a separate tag for ("int: ref-private-domain"). If we haven't made updates to that functionality, I'd like to filter out all content that references the private domain setup. I can add that tag as an Excluded Tag:



Sample filter with Included Tag and Excluded Tag

This filter now says: pull all articles with the "int: ref-settings-basic" tag, that don't have the "int: ref-private-domain" tag, with a status of Needs Review, Published, or Ready to Publish.

This narrows my list of articles down to 18, which means my content audit can go a lot faster.

I could further refine this to exclude additional tags.

Recommended uses

The Included Tags and Excluded Tags filters become more powerful the more consistently you use tags. They can be a valuable auditing tool if you're using tags for things like:

- **Product version/release information** - If you add tags for each version or release, you can pull documentation specific to some versions and not others
- **Policy/procedure version information** - If you add tags for specific policies and procedures (or revisions of those policies and procedures), you can pull documentation specific to certain versions of policies or procedures
- **Reviewer/Subject Matter Export (SME) information** - If you add tags for designated reviewers or SMEs, you can pull documentation relevant to a specific reviewer or SME

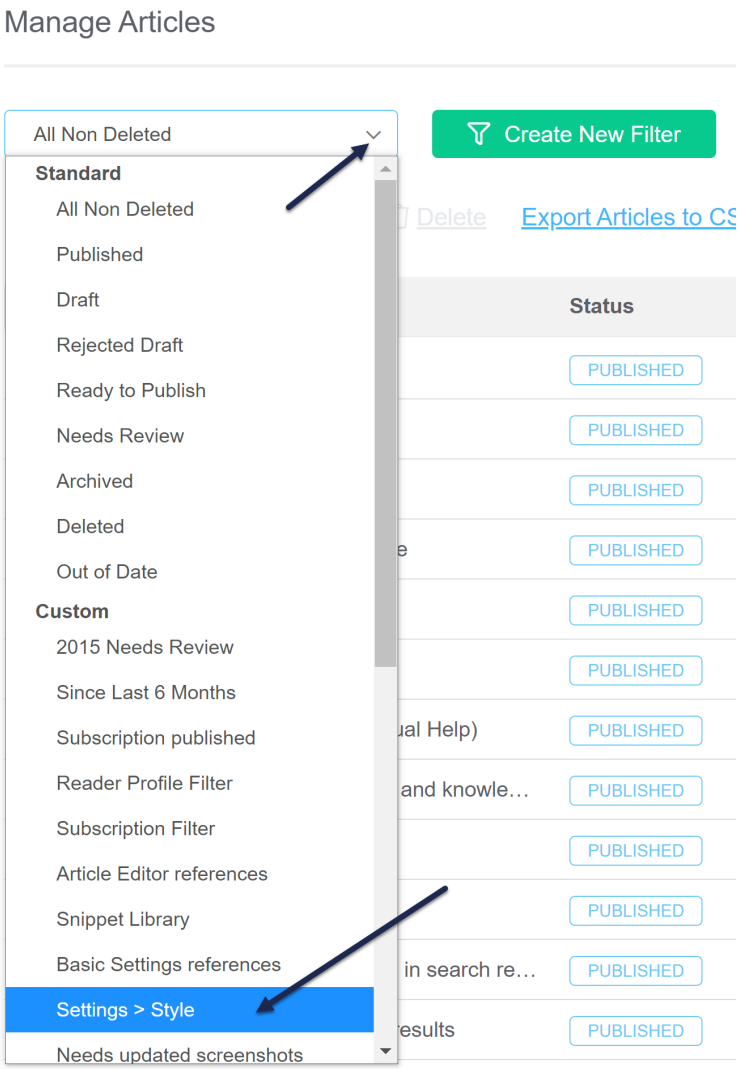
Delete a custom Manage filter

Last Modified on 05/29/2024 5:28 pm EDT

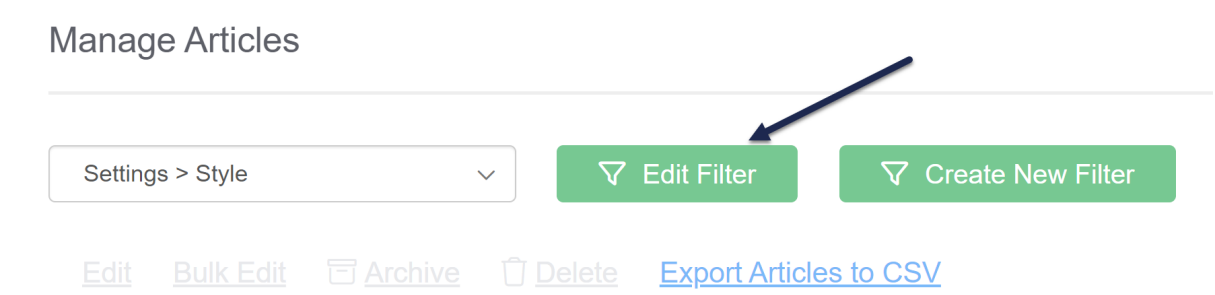
Deleting a filter will not delete any of the articles in the filter. If you'd like to delete articles, use the checkboxes next to the articles and the Delete option near the top.

To delete a custom Manage filter:

1. **In the top section of the lefthand navigation, select Manage.**
2. **Select the filter you'd like to delete from the dropdown.**

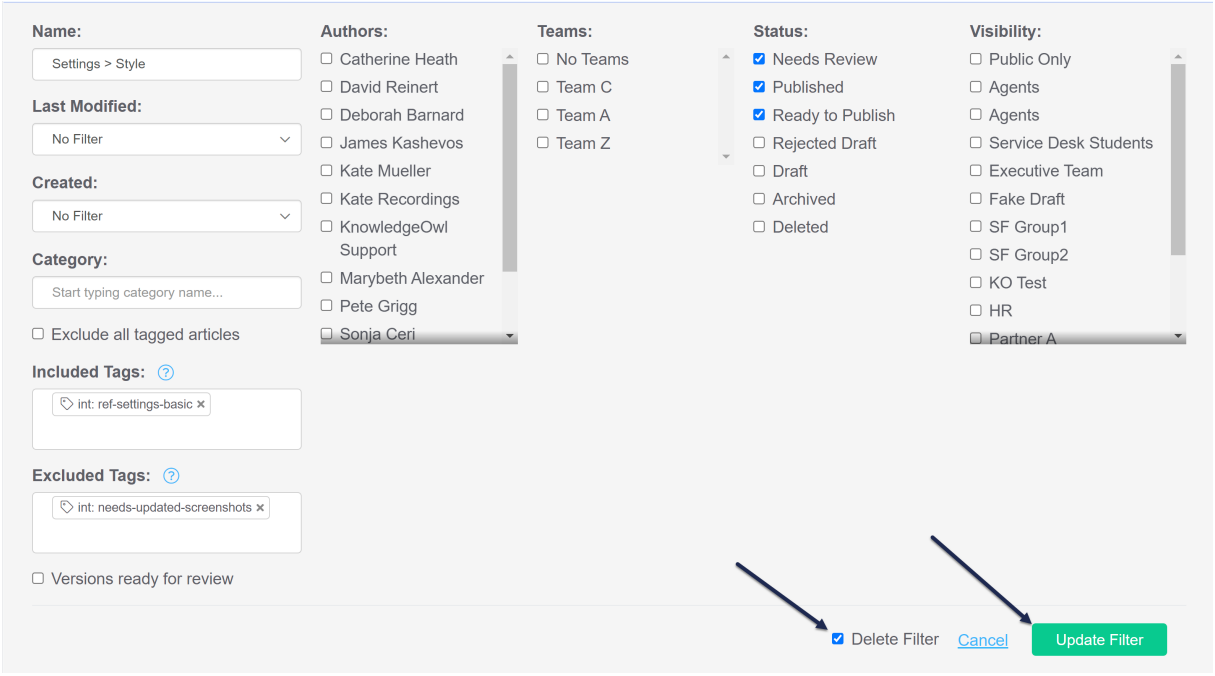


3. **Select the Edit Filter button.**



4. **In the filter details screen, check the box next to Delete Filter.**

5. **Then select the Update Filter button.**



Your filter will be deleted.

Export the Manage Articles list to CSV

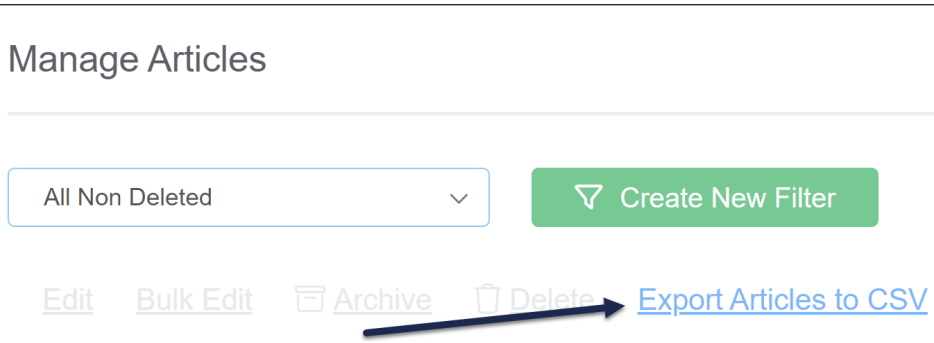
Last Modified on 05/29/2024 5:28 pm EDT

Once you've generated your article list, you can export that list to CSV. There are a few advantages to using the CSV export:

- CSV exports can act like Excel-styled reports on the number of articles you have, who authored them, and so on.
- The CSV export includes far more columns and information than the Manage Articles display shows. These can be useful for detailed audits of permissions, publishing status, and so on.
- CSV exports include the full available article list, so if you have a lot of articles in your filter, you don't have to deal with paging through them.
- They can provide great master lists to share for audits, updates, reporting, etc.

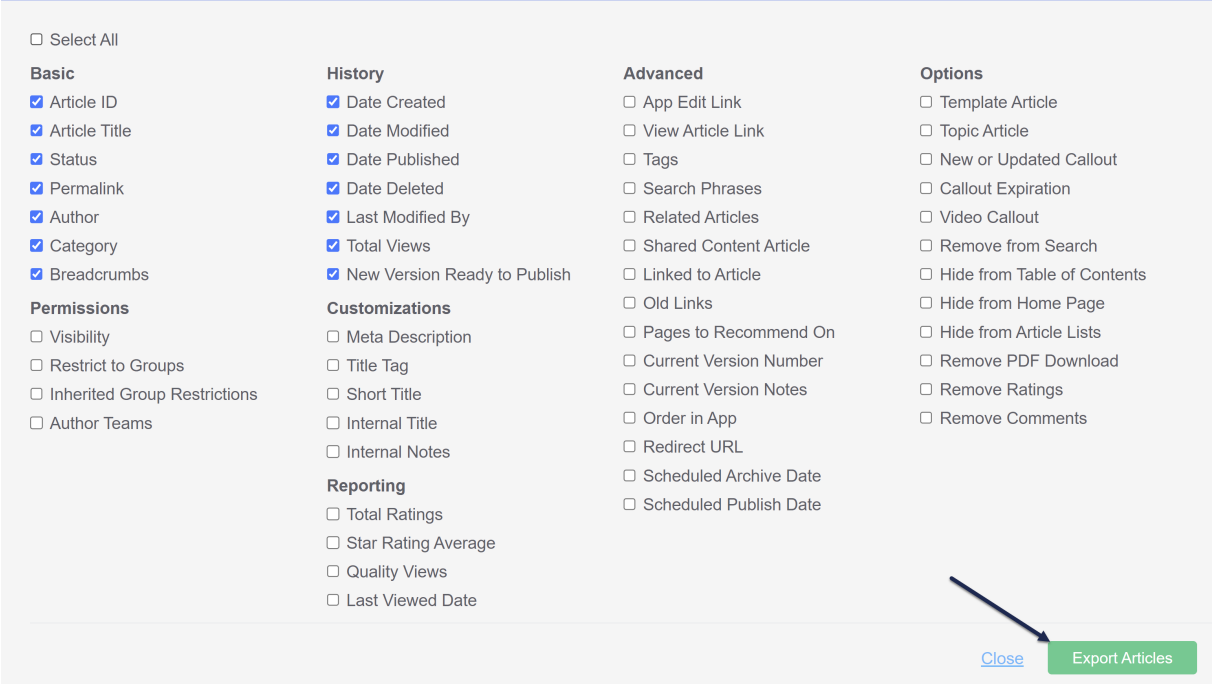
The CSV export will include all articles that match the current filter, so be sure you have the filter you'd like selected before you begin:

1. Select the **Export Articles to CSV** link.

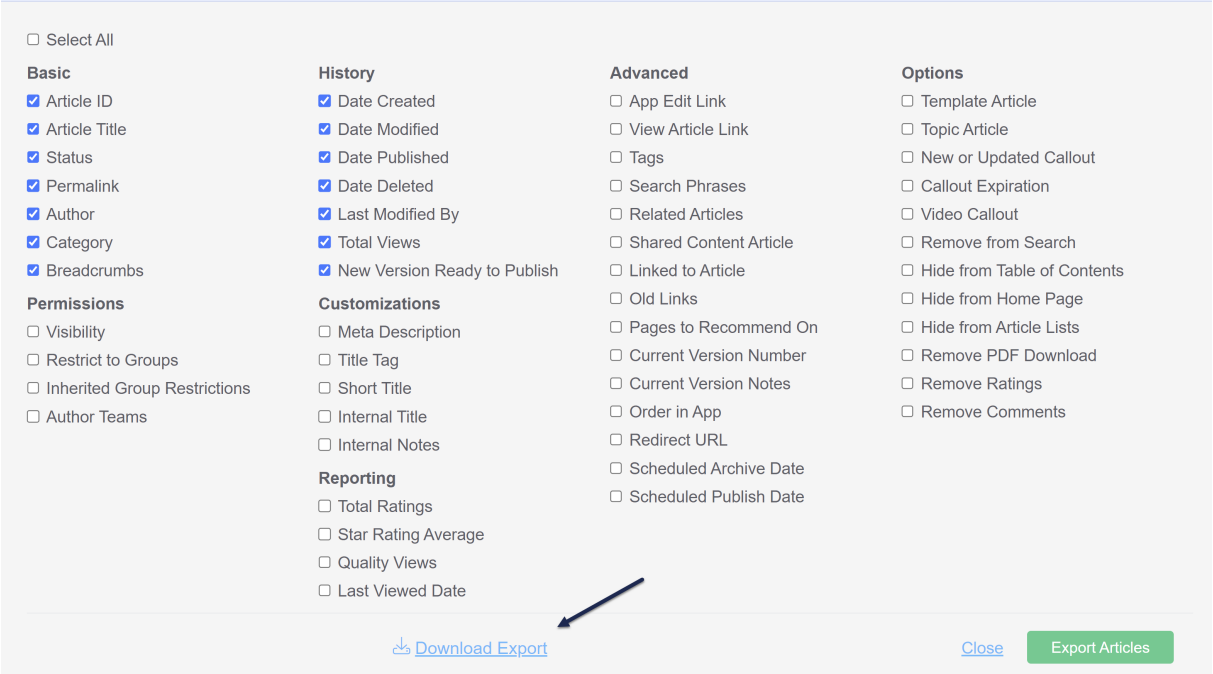


2. This will slide open a panel with checkboxes for you to select which columns you want to include in your export. Anything with a check will be included.

3. Once you've made your column selections, click the **Export Articles** button.



4. **Very large exports may take a couple minutes to generate; most will generate in under two minutes. You'll know when an export has generated because the "Generating Export" message will change to a Download Export link. Select this link to download your CSV:**



5. **Select Close in the lower right to collapse the export options.**

Tips & tricks

We've seen customers use the Manage Articles CSV export in a variety of ways, but here are some of our favorite tricks:

- **Reviewing knowledge base layout: To review which articles are located in all of your categories, include the Category and Breadcrumbs columns. Category will show you the article's direct parent category; Breadcrumbs will show you the article's full table of contents hierarchy.**

- **Auditing reader group restrictions:** If you'd like to export a list of articles to review which articles are viewable by certain groups, or which are restricted vs. public, include the **Restrict to Groups** and the **Inherited Group Restrictions** columns. Restrict to Groups will show you reader group restrictions that have been assigned to the individual article; Inherited Group Restrictions will show you reader group restrictions that the article has inherited from the category or categories it's in.
- **Viewing articles by clicking a link in the CSV:** If you'd like someone who views the CSV to be able to open articles directly from the spreadsheet, consider using the **App Edit Link** and **View Article Link** columns. App Edit Link includes the app.knowledgeowl.com link that will open the article in edit mode; View Article Link provides the URL of the article as it appears to your knowledge base readers.
- **Reviewing shared/synchronized content:** If you have articles that link and synchronize their content with other articles, consider using the **Shared Content Article** and **Linked to Article** columns. Shared Content Article will show links to individual articles in the same knowledge base; Linked to Article will show links to articles in other knowledge bases.
- **Redirects:** There are two ways articles can involve redirects: an article can be set up as a URL redirect article (which will take someone to another website entirely, usually used for resources outside of KnowledgeOwl), and redirecting an old article permalink to a new one (useful when you've deleted old articles or renamed them and you want to be sure existing links don't break). You can audit for each of these types of redirects; the **Redirect URL** field will capture URLs entered for URL redirect articles, and the **Old Links** field will capture any old links added for the article.

Bulk edit articles in Manage

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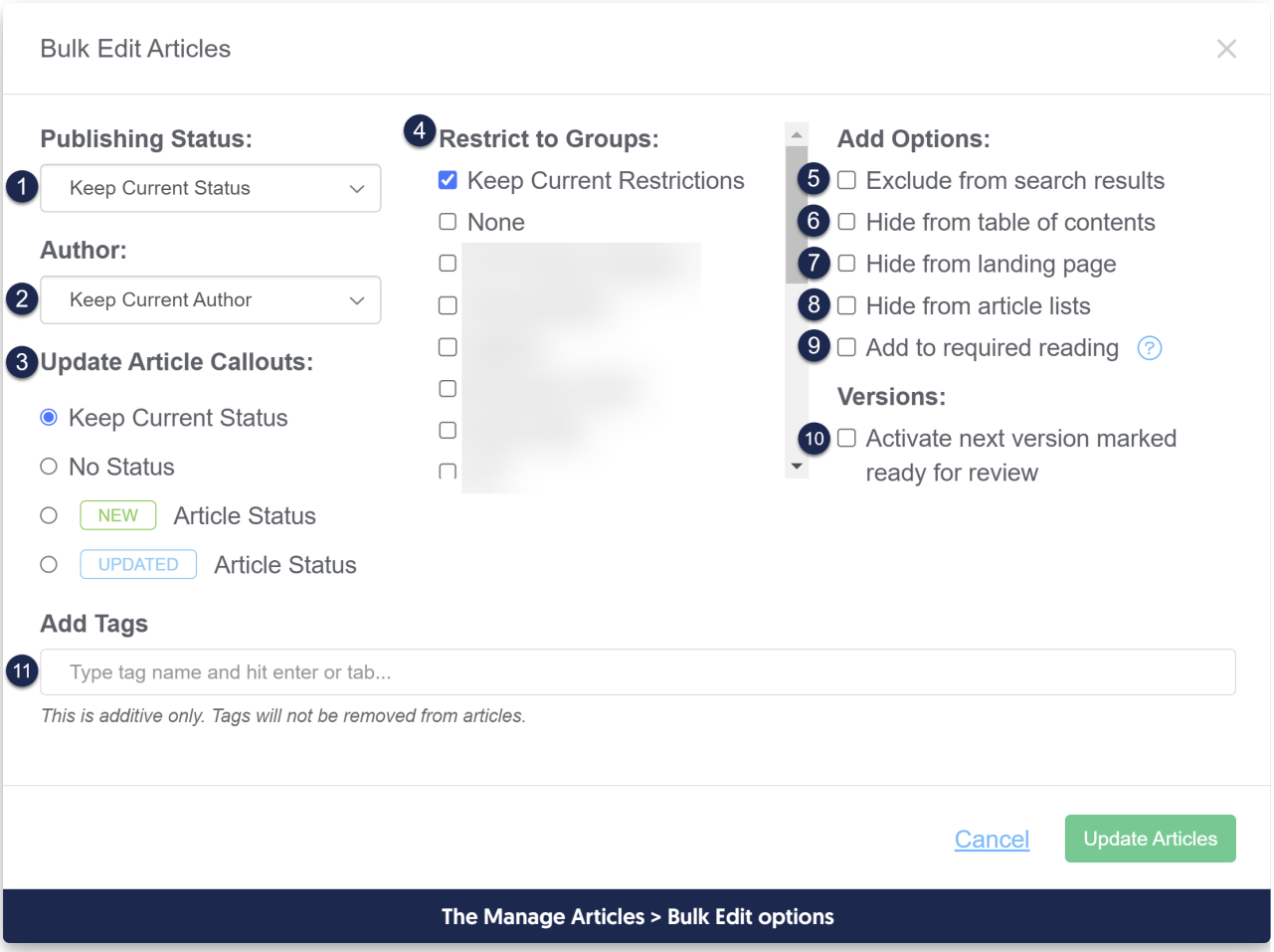
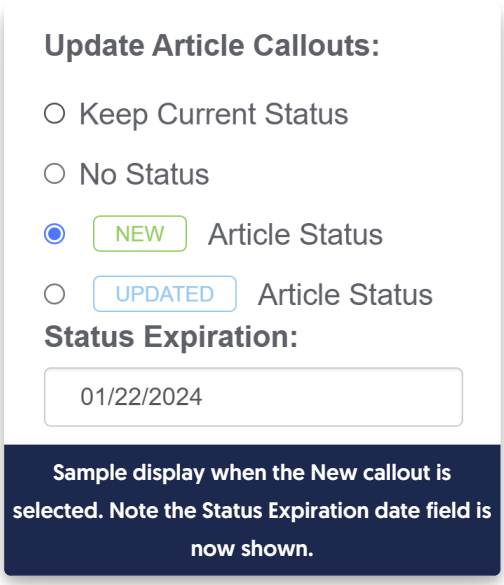


The Manage Articles > Bulk Edit options

In Manage Articles, you can **Bulk Edit** articles in a few ways:

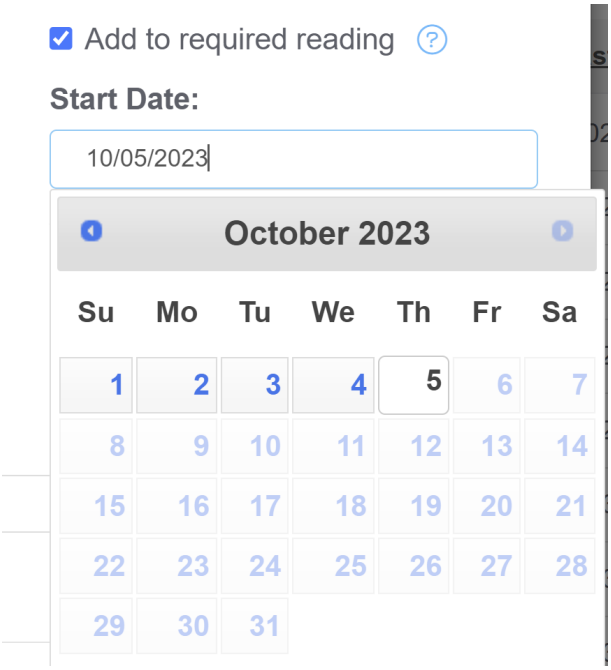
1. Change the **Publishing Status** for all selected articles (e.g. set these articles to Published status)
2. Change the **Author** for all selected articles (e.g. set these articles to have yourself as the author)
3. **Update Article Callouts** to add New or Updated callouts to articles. Useful for triggering subscription notification emails and adding New/Updated callouts in your table of contents. This section has four options:
    - **Keep Current Status:** the article callout field won't be touched during the bulk edit
    - **No Status:** Overwrites any existing status to set the selected articles to No Status.
    - **New Article Status:** will assign the New article callout to selected articles. If selected, the status expiration date field will display and will use your knowledge base's default callout expiration, which you can manually override, just as in Article Editor.



Sample display when the New callout is selected. Note the Status Expiration date field is now shown.

- **Updated Article Status:** will assign the Updated article callout to selected articles. If selected, the status expiration date field will display and will use your knowledge base's default callout expiration, which you can manually override, just as in Article Editor.

4. Change the explicitly-assigned reader group **restrictions** for all selected articles (e.g. restrict these articles to your "Administrator" reader group; or set these articles to have no reader group restrictions using None)
    a. **Keep Current Restrictions** will guarantee that no other groups are added to the content, even if boxes below that have been checked.
    b. **None** will remove any explicitly assigned reader group restrictions from the articles. To remove inherited reader group restrictions, edit the category that's adding the restriction.
    c. Checking boxes next to any of the reader groups in the list will overwrite any reader group restrictions added to the article and replace them with the group(s) who's boxes you've checked.
5. Set all selected articles to **Exclude from search results**. (There is no way to bulk edit/undo this to include them, so use with caution!)
6. Set all selected articles to **Hide from table of contents**. (There is no way to bulk edit/undo this to show in the table of contents, so use with caution!)
7. Set all selected articles to **Hide from landing page** (home or category landing page). (There is no way to bulk edit/undo this to show in the table of contents, so use with caution!)
8. Set all selected articles to **Hide from article lists**. (There is no way to bulk edit/undo this to show in the table of contents, so use with caution!)
9. Set all the selected articles to be **required**. This option only displays if Required Reading is enabled. Once selected, a Start Date field will appear so you can set the Start Date of the articles' required status (which is required for it to properly display to readers as required!)



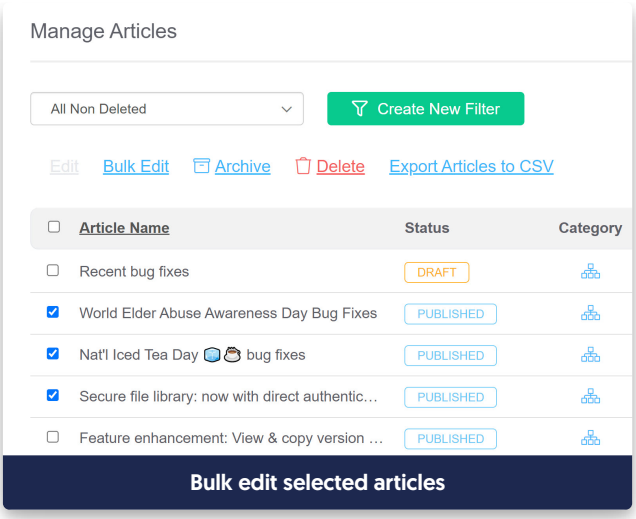
10. For selected articles with versions marked "Ready for review," activate the next ready for review version.
11. Add tags to all selected articles (e.g. add "needs-update" tag to these articles) -- Note: this will only add tags to the articles; it will not remove or overwrite any existing tags they might already have

All Bulk Edits to articles will update the **Last Modified** date for the articles selected.

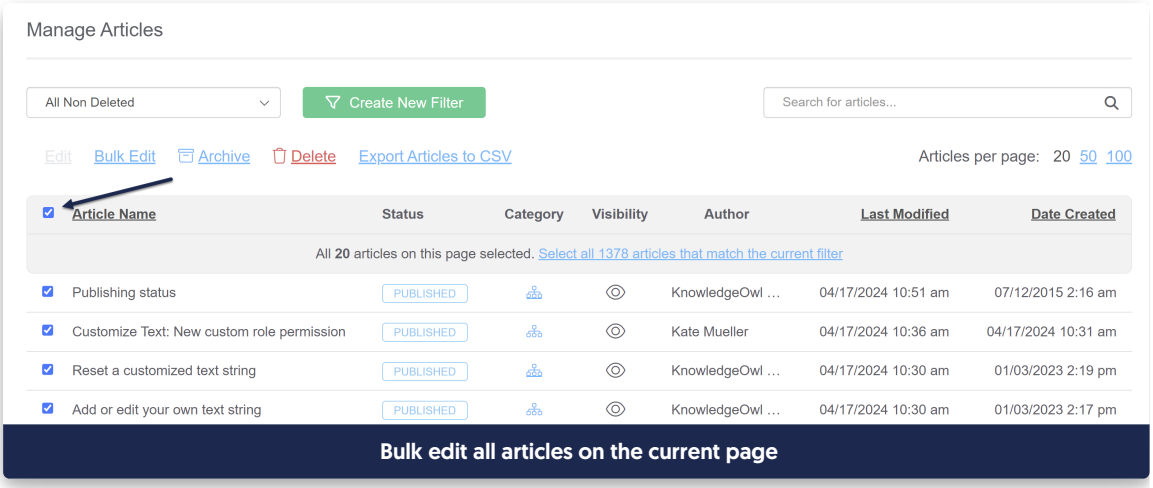
Our default **Editor** and **Writer** roles have permission to bulk edit articles. If you're using a custom author role, that role must have the Article Permission to **Edit articles in bulk** to bulk edit articles.

To make these kinds of bulk edits:

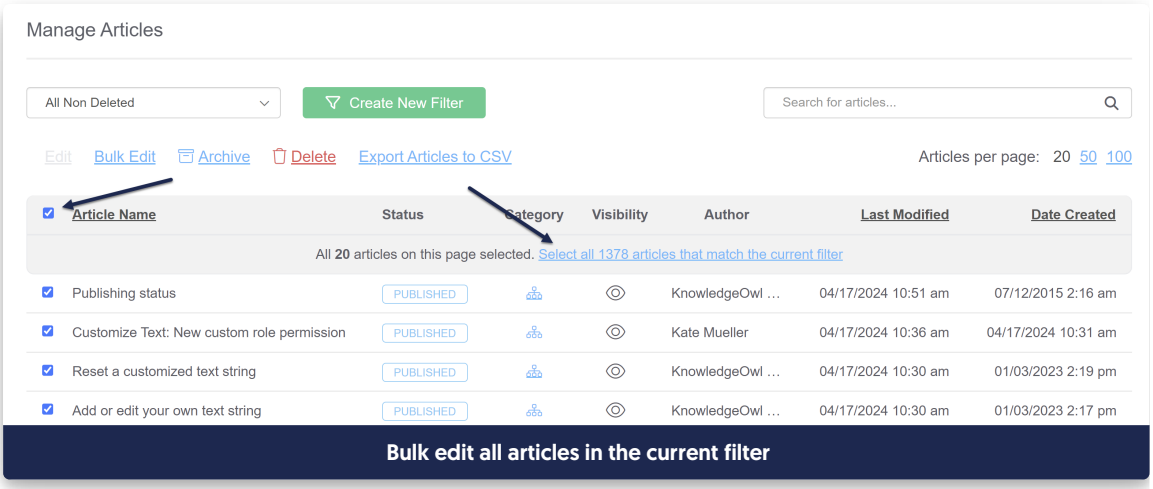
1. In the top section of the lefthand navigation, select **Manage**.
2. Use the checkboxes to select the articles you'd like to edit. To make your selection, you can:
    - Select individual checkboxes to select only specific articles:



- **Select all articles on the page using the checkbox in the header:**

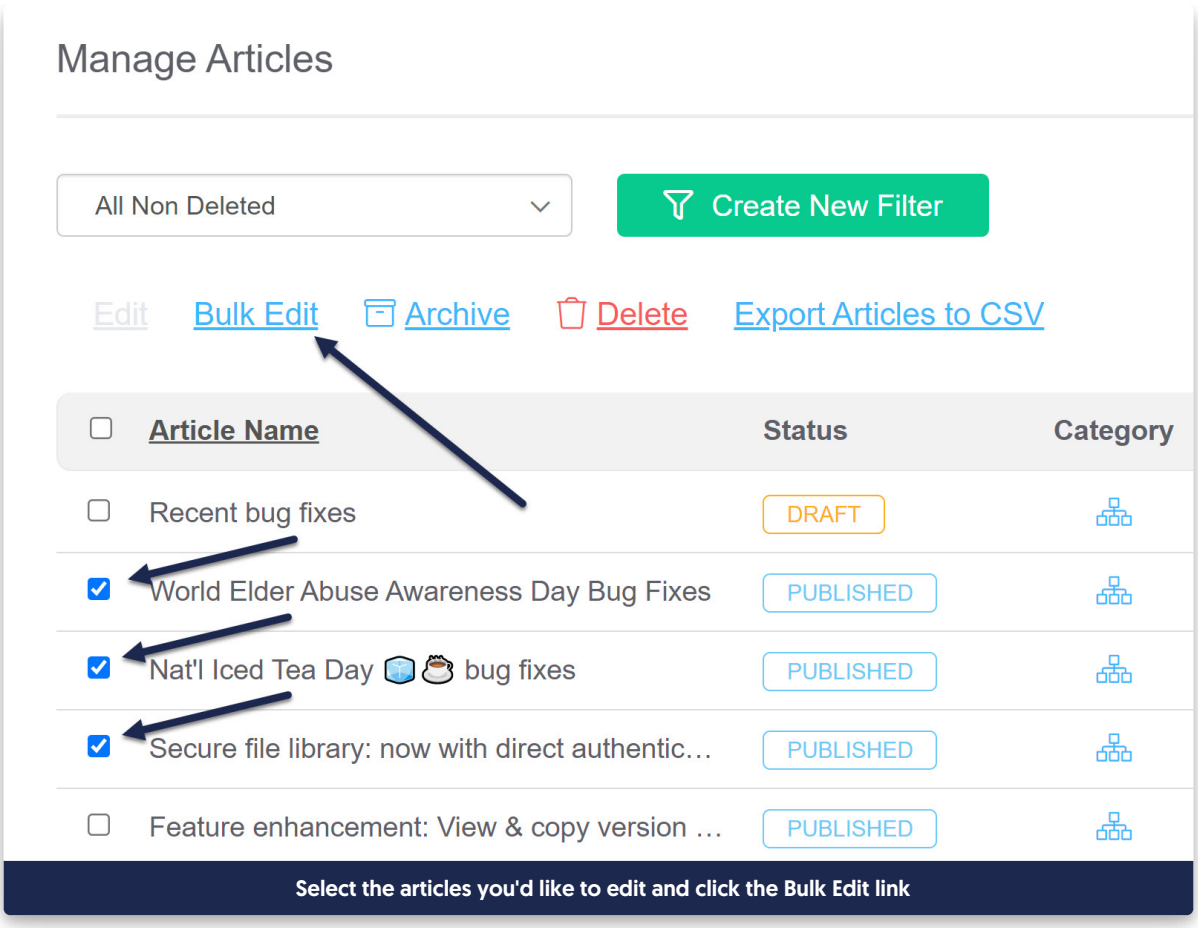


- **Select all articles in the current filter view (all pages) by checking the box in the header and clicking the "Select all xxx articles that match the current filter" link. This will select all articles in the view you've selected, regardless of pagination:**



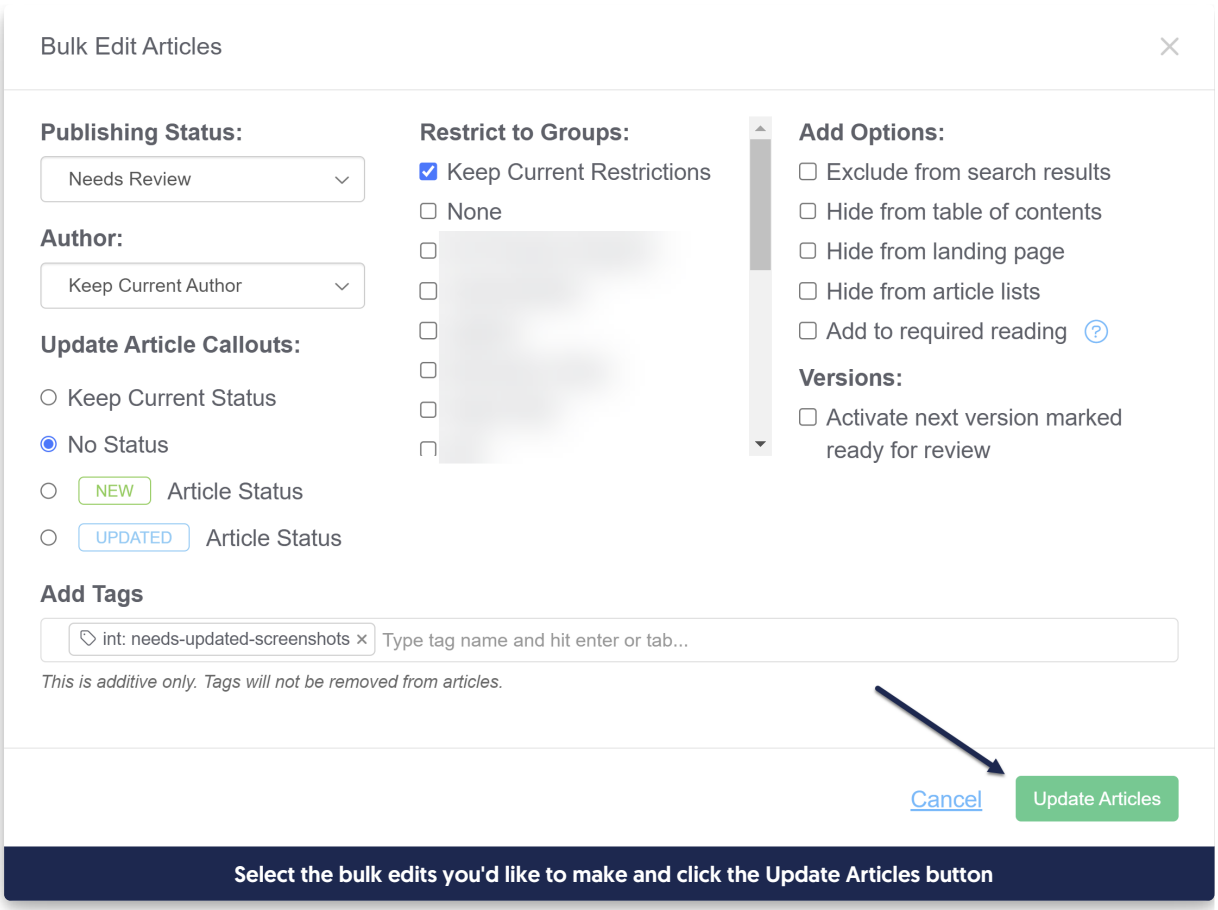
When all in filter is selected, you'll see a different message across the top, saying "All xxx articles that match the current filter selected." You can undo this by selecting the Clear selection link that appears.

3. **With your articles selected, select the Bulk Edit link above the article list.**



4. **Select the changes you'd like to make in the Bulk Edit Articles pop-up.**

5. **Once you've finished selecting the bulk edits you'd like to apply, select the Update Articles button in the lower right to make the edits.**



In the screenshot above, I'm setting all the selected articles to a "Needs Review" status and adding the "int: needs-updated-screenshots" tag. The "No Status" in Update Article Callouts will ensure that none of these articles have a New or Updated callout, even if one did previously exist. No other changes will be made.



See How do bulk edits/deletes work? for more information on what you can expect to see during a bulk edit. See Bulk activating "ready for review" versions for more information on using the "Activate next version marked ready for review" option.

Bulk activate "ready for review" versions

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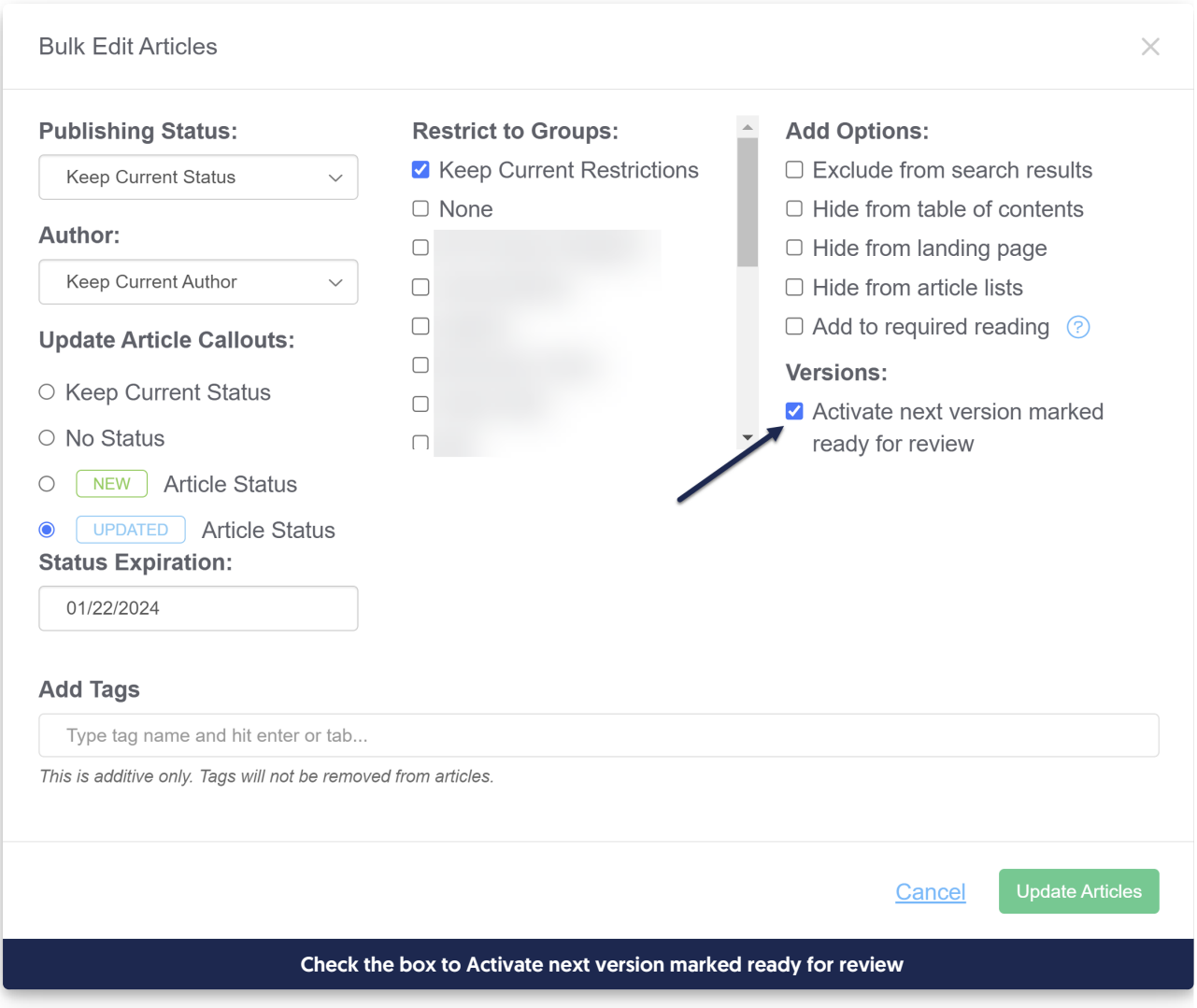
As part of the bulk editing options, you can also choose to "Activate next version marked ready for review." If you have a lot of versions that need to go "live" at the same time, as part of a release or policy update, this can be a great way to activate them all at the same time.

We recommend also setting the Updated Article Callout when you activate a new version, but that step is totally optional!



To access this screen:

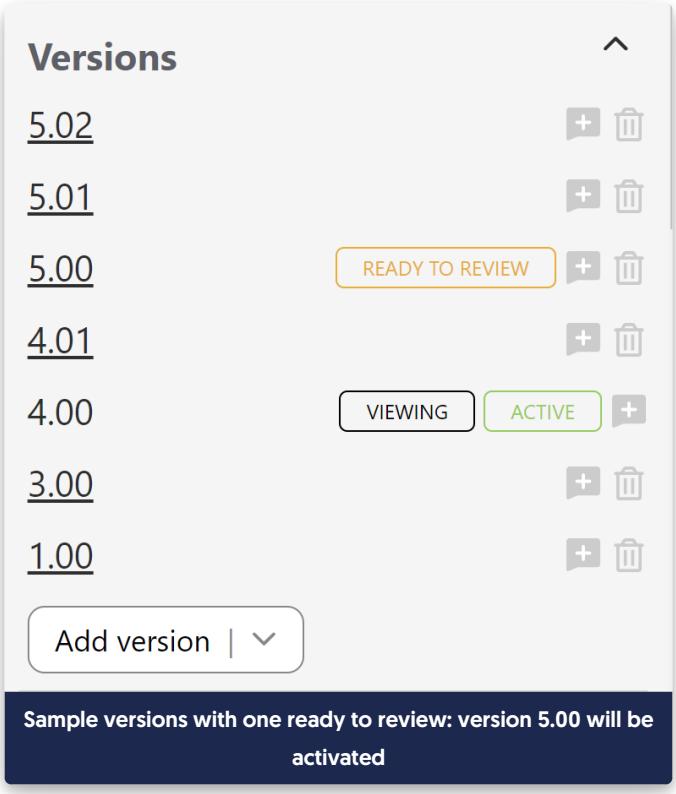
1. **In the top section of the lefthand navigation, select Manage.**

2. Check the boxes next to the articles you'd like to bulk activate.
3. Select the **Bulk Edit** link to open the pop-up in the screenshot above.
4. Check the box next to "Activate next version marked ready for review."
5. *Optional:* If you use Article callouts, this is a great time to add the Updated article callout, too, as shown in the screenshot above!
6. Select the **Update Articles** button to complete the activation.

If you're unfamiliar with bulk editing, see Bulk editing articles in Manage for more details on steps 1-3.

"Activate next version marked ready for review" will check the selected articles. If any of them are articles with multiple versions, and one of those versions is marked as "Ready for review", it will automatically set that version to be active. If the articles have no versions currently ready for review, they'll simply be re-saved.

So, for example, if we bulk edit this article to activate the next version:



Sample versions with one ready to review: version 5.00 will be activated

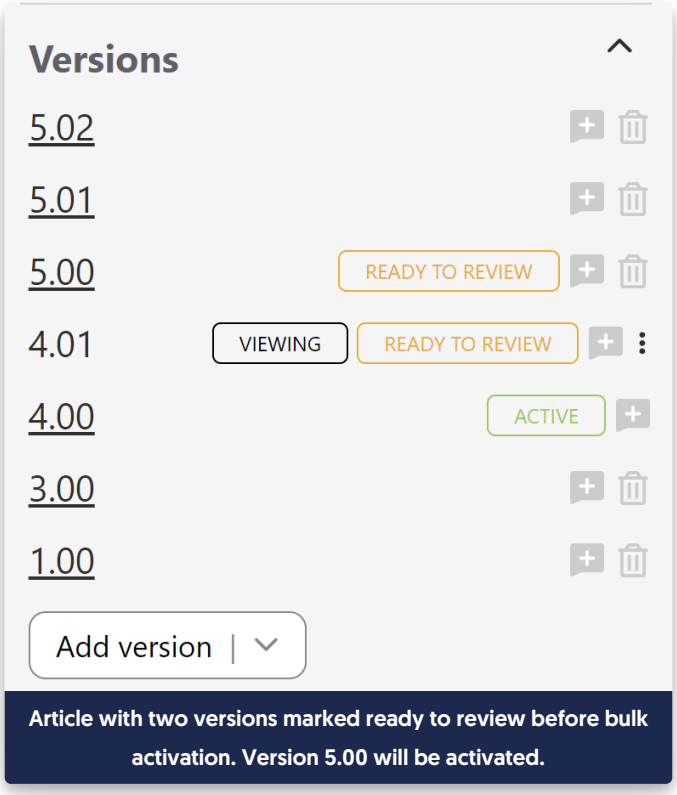
After the bulk edit completes, version 5.00 will be the current active version.

For the publishing status, that activated version will:

- If Keep Current Status is used, the version will inherit whatever publishing status the article already has overall.
- If you've selected a specific publishing status in the bulk edit screen, the newly-activated version will receive that publishing status.

If I have multiple versions marked ready for review, which version gets activated?

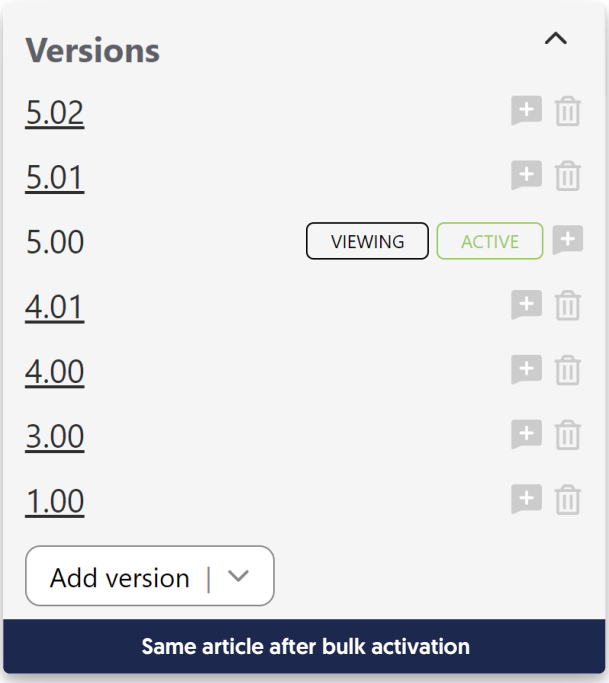
If an article has *multiple* revisions in a ready for review state, such as in this example:



Article with two versions marked ready to review before bulk activation. Version 5.00 will be activated.

The most recent/newest version marked ready for review will be activated and the Ready to Review flag will be removed from the other versions.

So in this example, once we bulk edit to activate versions, version 5.00 will be the current active version and 4.01 will no longer be marked ready to review:



Same article after bulk activation

For this reason, we don't recommend marking multiple versions as ready for review at the same time if you're using bulk activation. If multiple ready versions makes sense for your workflow,

we recommend manual activation of versions.

Bulk edit articles to make them required reading

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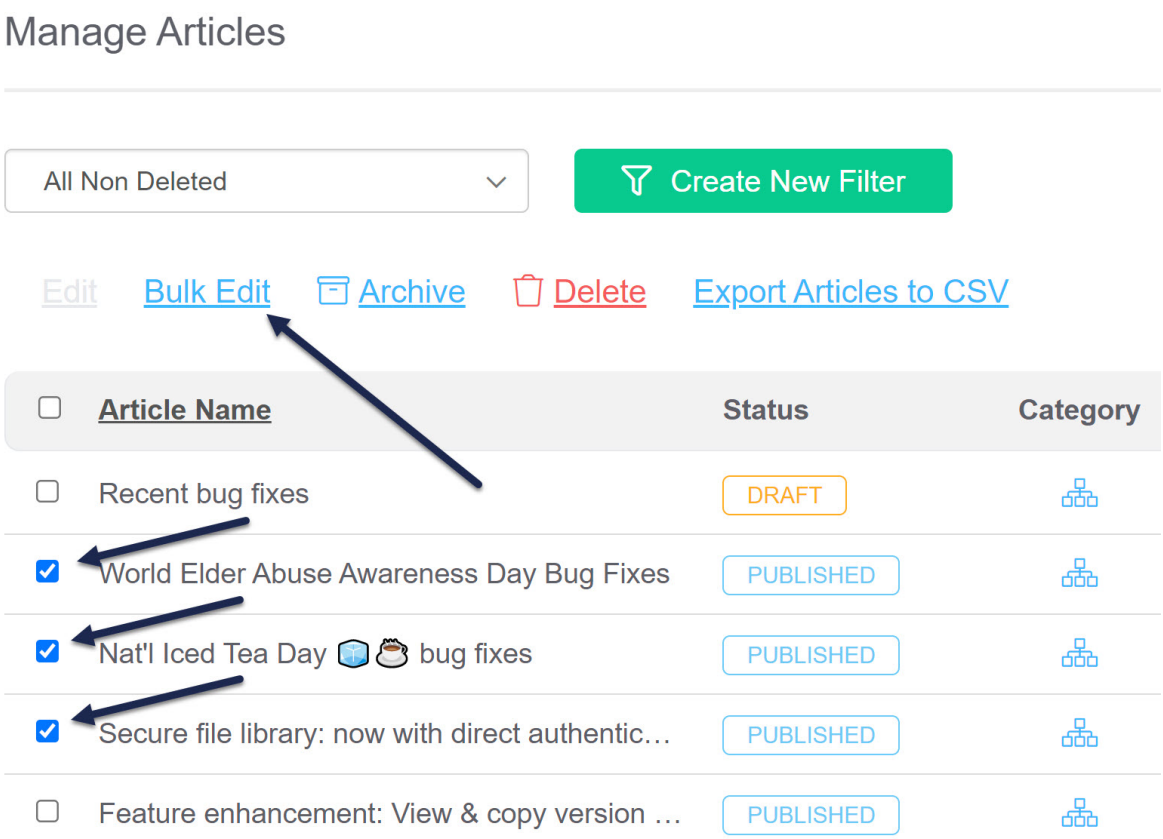
If you have multiple articles you'd like to mark as required, you can either choose to edit them individually or you can use the **Bulk Edit** feature in **Manage** to mark them all required at once.

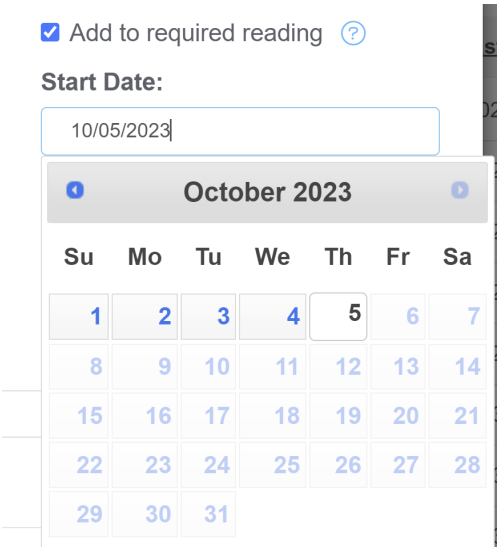
To bulk edit multiple articles to mark them as required:

1. In the top section of the lefthand navigation, select **Manage**.
2. If necessary, use a Standard or Custom filter and/or search to display the articles you want to mark as required.
3. Check the boxes next to the articles you'd like to mark as required.
4. Select the **Bulk Edit** link.



5. In the Bulk Edit Articles pop-up, in the **Add Options** section, check the box next to **Add to required reading**.

6. Once you check the box, a Start Date field will appear. Use the date picker to select the date you'd like to use as the Start Date for the required reading. (When all else fails, use today's date!)



7. Make any other bulk edit selections you'd like.

8. Once you've done making your selections, select the **Update Articles** button to begin the bulk edit.

Once your bulk edit is complete, all articles you selected will be marked as Required and have the Start Date set to whatever date you selected.

You cannot set articles in topic display categories or URL redirect articles to be required. Bulk Edits on these articles won't go through.

For more information on all the options in the Bulk Edit pop-up, see Bulk editing articles in Manage.

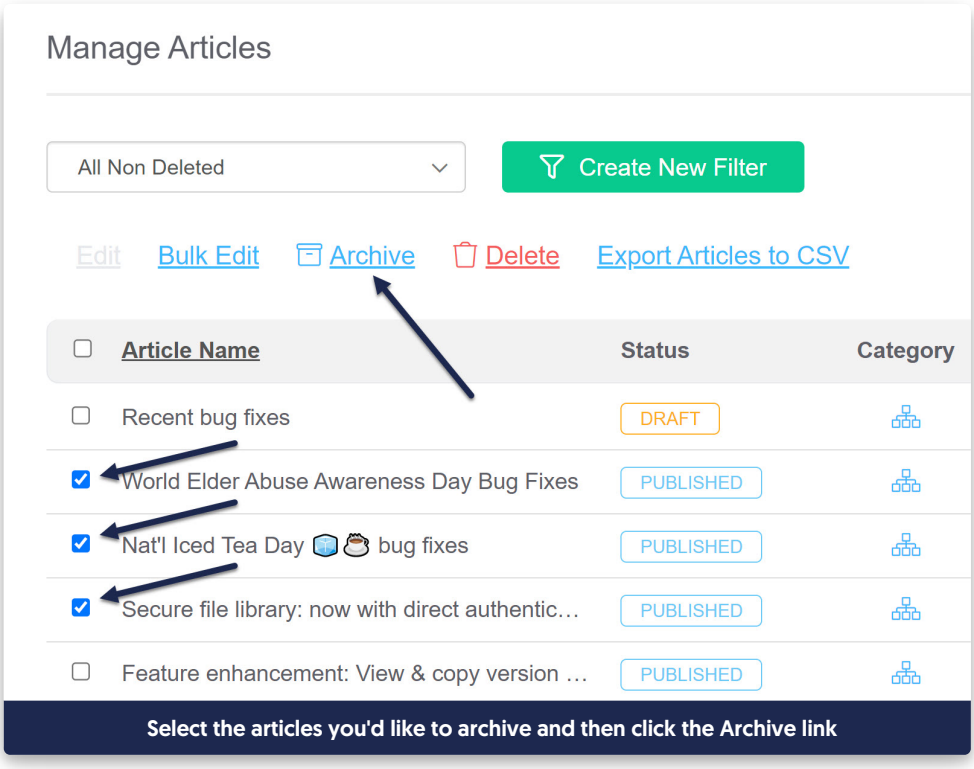
Archive articles in bulk in Manage

Last Modified on 05/29/2024 5:27 pm EDT

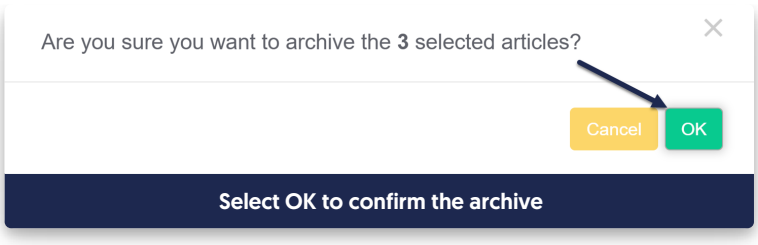
Our default **Editor** and **Writer** roles have permission to archive articles. If you're using a custom author role, that role must have the Article Permission to **Archive articles** to bulk archive articles.

You can archive multiple articles at once using Manage Articles. To do so:

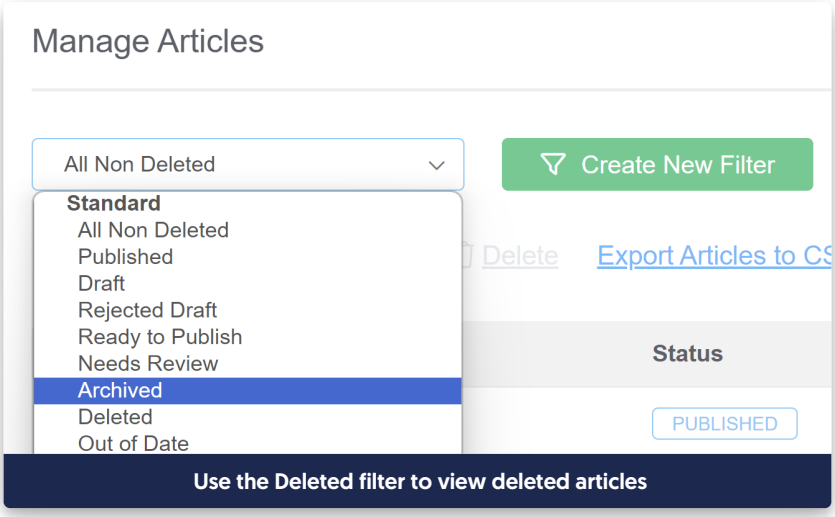
1. In the top section of the lefthand navigation, select **Manage**.
2. Use a filter or search to display the articles you'd like to archive.
3. Check the box next to each article you'd like to archive. (Or use the checkbox in the header to select all displayed articles/all articles in filter.)
4. Select the **Archive** link just above the article list.



5. A confirmation message will appear, identifying how many articles you've selected to archive. Select **OK** to archive the articles you selected.



Once the articles are archived, if you need to view or edit them, select Archived from the filter dropdown at the top to view a full list of archived articles:



Delete articles in bulk in Manage

Last Modified on 05/29/2024 5:28 pm EDT

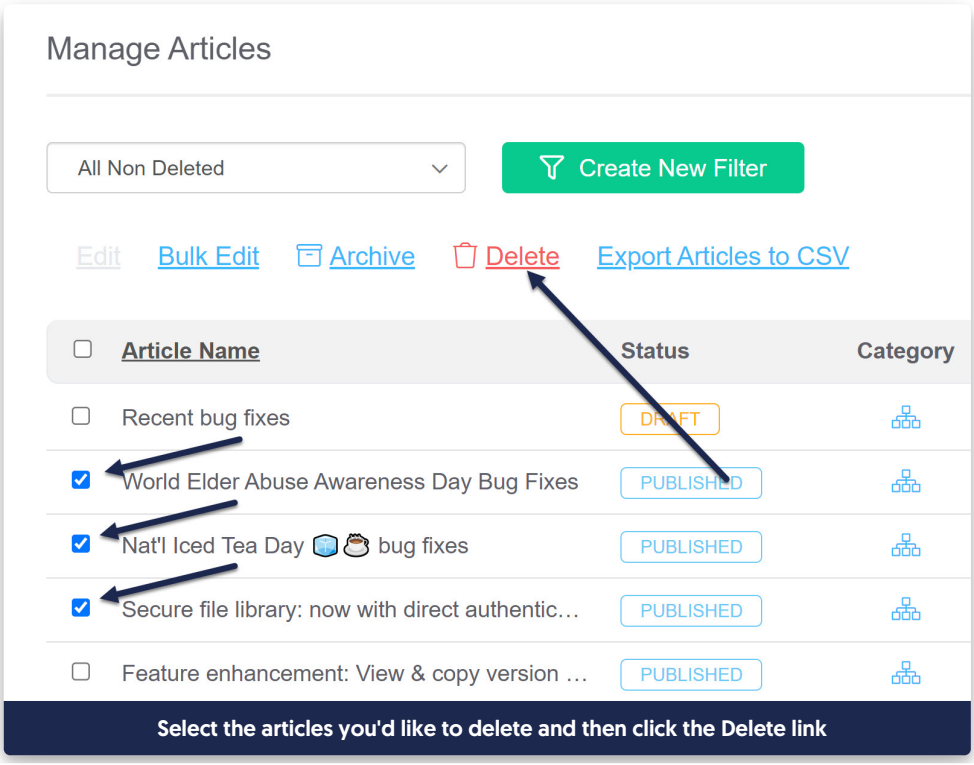
Our default **Editor** and **Writer** roles have permission to delete articles. If you're using a custom author role, that role must have the Article Permission to **Delete articles** to bulk delete articles.

Deleting an article will:

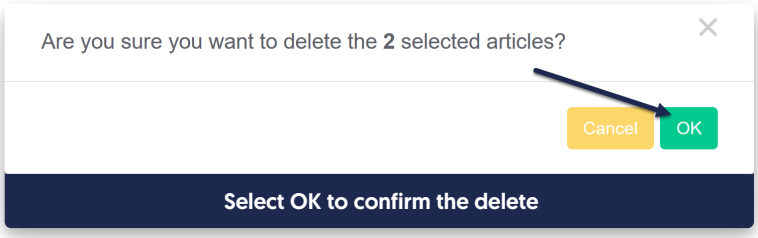
- Remove it completely from your live knowledge base (the table of contents, category landing pages, search results, article lists)
- Show a 404 page when someone navigates to the article's URL, unless you've set up an old link to redirect to a different page.
- Delete all view data for the article. This data will not be recovered if you recover the article and will disappear from the Popular Articles Report.
- Remove it from the Articles hierarchy (though you can still find it in the **Manage > Deleted** filter)

You can delete multiple articles at once using Manage Articles. To do so:

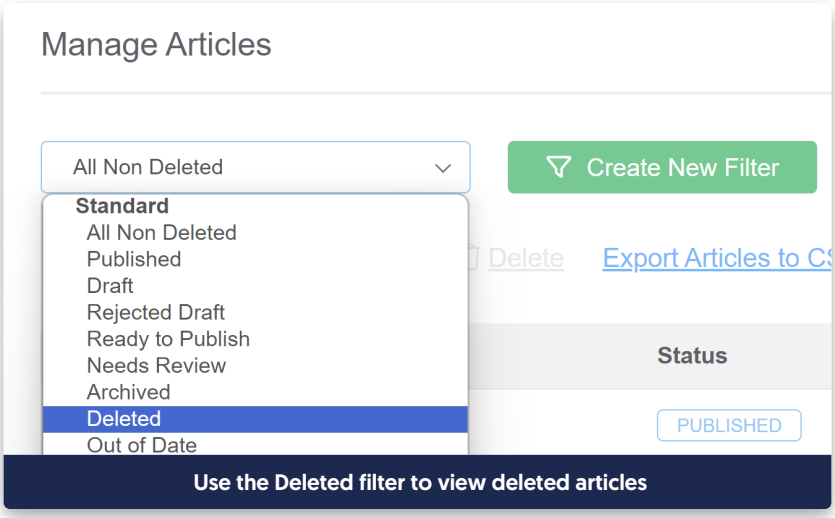
1. In the top section of the lefthand navigation, select **Manage**.
2. Use a filter or search to display the articles you'd like to delete.
3. Check the box next to each article you'd like to delete. (Or use the checkbox in the header to select all displayed articles/all articles in filter.)
4. Select the **Delete** link just above the article list.



5. **A confirmation message will appear, identifying how many articles you've selected to delete. Select OK to delete the articles you selected.**



Once the articles are deleted, if you need to view or edit them, selected Deleted from the filter dropdown at the top to view a full list of deleted articles:



How do bulk edits, archives, and deletes work?

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In Manage Articles, the number of articles being edited, archived, or deleted and the type of bulk edit influence how long a bulk edit takes:

- Bulk edits to **add tags** complete fairly quickly, regardless of how many articles are selected.
- Selecting articles and clicking the **Delete** link completes fairly quickly, regardless of how many articles are selected.
- All other bulk edit types take longer, and will take longer the more articles you've selected.

Bulk edits, archives, and deletes for 9 or fewer articles will load almost instantly, regardless of the type of edit.

For bulk edits, archives, and deletes for 10 or more articles, you'll see a progress bar shown across the top of the screen, letting you know how many articles remain:



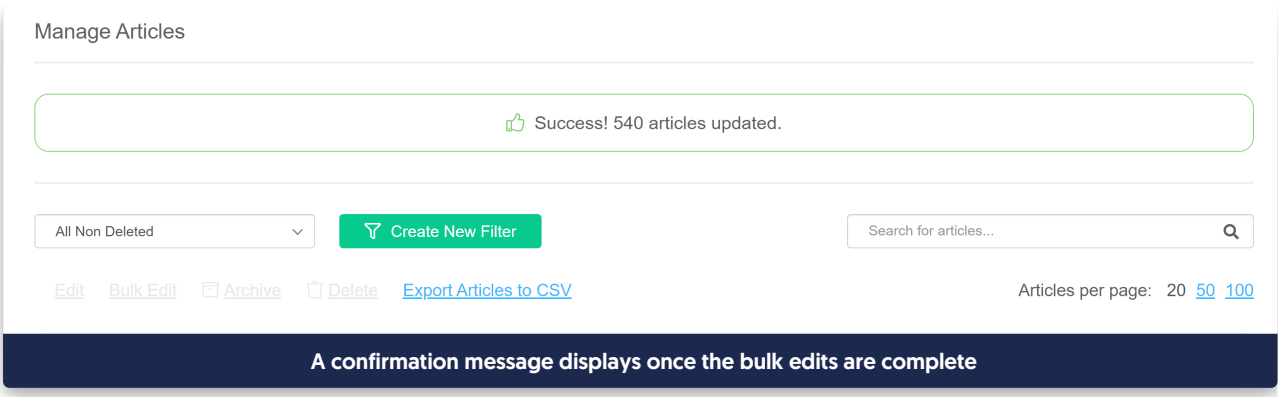
Sample initial bulk edit progress bar

The remaining articles countdown will update in chunks of 50 (so in this example starting with 540 articles, it will say 540, 500, 450, etc.), so that you can get a sense for how many articles remain:



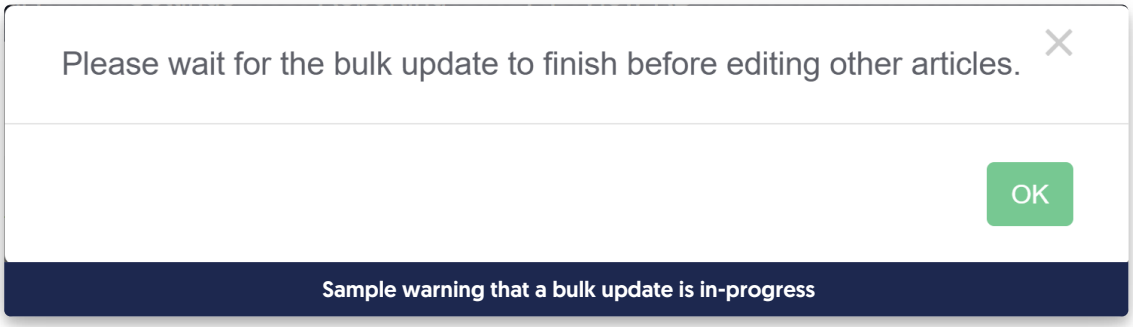
The progress bar will countdown in chunks of 50

Once the action is complete, the progress bar disappears and a confirmation message is displayed:



A confirmation message displays once the bulk edits are complete

You can only run one bulk edit at a time. With the progress bar present, if you try to select other things, you'll get a warning letting you know a bulk update is in progress:



Sample warning that a bulk update is in-progress

Once the update is complete, you can run another.

Ratings overview

Last Modified on 05/29/2024 5:27 pm EDT

The Ratings feature is one way for you to capture feedback from your readers about the quality of your content.

Using either a thumbs up/thumbs down or a five-star rating system, with the click of a button readers can rate your content. This lets your readers know you care about their input and helps you make that input actionable.

All ratings are captured in a dashboard so you can see:

- Which articles have been rated
- The total number of ratings each article receives
- The average rating the article receives

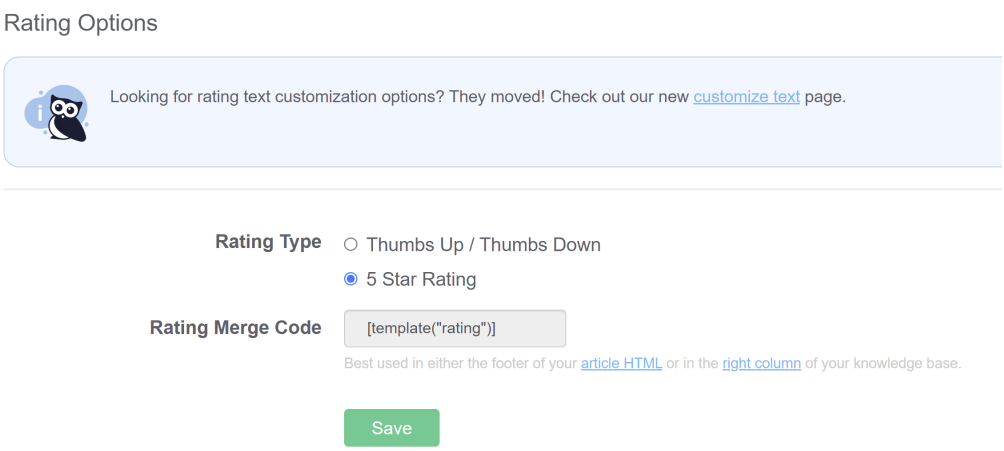
This way, you can target low-rated content for improvement, or consider using high-rated content as templates for future content creation.

Enable ratings

Last Modified on 05/29/2024 5:28 pm EDT

To get started using ratings:

1. **Go to Settings > Article Ratings.**
2. **Select the Rating Type.**



   a. **You can choose between Thumbs Up / Thumbs Down and 5 Star Rating. Here's how those display in the article itself:**



Sample Thumbs up / Thumbs Down



Sample 5 Star Rating

3. Once you've configured the Ratings the way you'd like, **Save** your changes.

> If you'd like to change the text used for the ratings section, go to **Tools > Customize Text** and select the **Article** section.

4. Next, be sure that the **Rating Merge Code** is added where you'd like it in your knowledge base. By default, it's added to the Article template and the Right Column. You don't need to do anything if you're happy with the placement!

If you'd like to make changes to where the rating template is added in the Article template:

1. Go to **Settings > Style**.
2. Below the preview pane, select **Custom HTML**.
3. Select **Article** from the dropdown.
4. Look for the merge code in the footer section. You can cut/paste it anywhere else in the template (or remove it entirely).

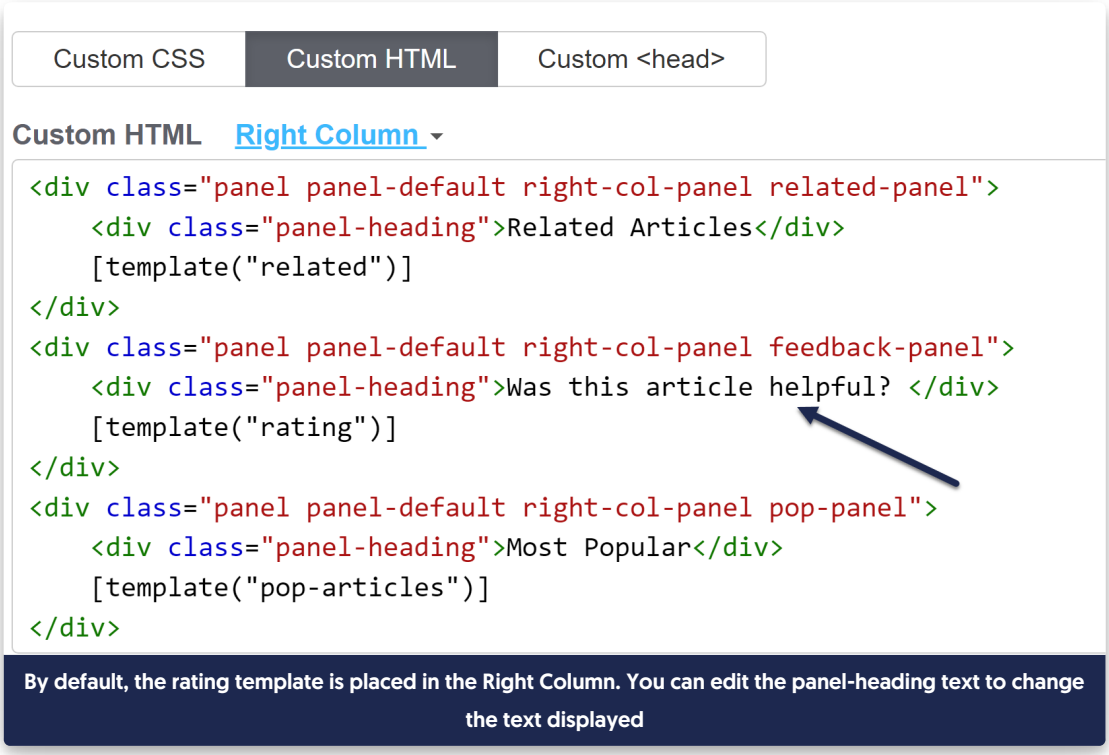


5. **Save** your changes.

If you're using a layout with the Right Column displayed and you'd like to make changes to where the Rating template is displayed:

1. Go to **Settings > Style**.

2. Below the preview pane, select **Custom HTML**.
3. Select **Right Column** from the dropdown.
4. Look for the section with the merge code.
5. If you want to move the Rating section, highlight the entire div with class feedback-panel, cut it from this location, and paste it in somewhere else in the Right Column.
6. If you're happy with the location but just want to change the text, edit the panel-heading text that appears within that div:



7. **Save** your changes.

Add ratings to all articles

Last Modified on 08/28/2024 11:04 am EDT

By default, the rating merge code is added to the HTML of all articles.

If you've removed this merge code and want to readd it:

1. Go to **Settings** > **Style**.
2. In the **Customize HTML, CSS, and JS** section, select **Custom HTML**.
3. Select **Article** from the **Select HTML section to edit** dropdown.
4. Copy the merge code below and paste it in wherever you'd like the ratings to appear. (Refer to Default Article HTML to see our default placement directly above the comments template, but put it wherever you'd like.)

```
[template("rating")]
```

5. Be sure to **Save** your changes.

The merge code will automatically display a title and the rating system you've selected (either the thumbs up/thumbs down or the stars).

To edit the title displayed, head to **Tools** > **Customize Text** > **Article** and update the **Article star rating label** (if using stars) or **Article thumb rating label** (if using thumbs). Refer to Section breakdown: Article for more detailed instructions.

Add ratings to individual articles

Last Modified on 08/28/2024 11:55 am EDT

By default, the Ratings section displays in all articles.

You can override this behavior in individual articles by selecting the **Remove feedback ability** option in **Display Settings**.

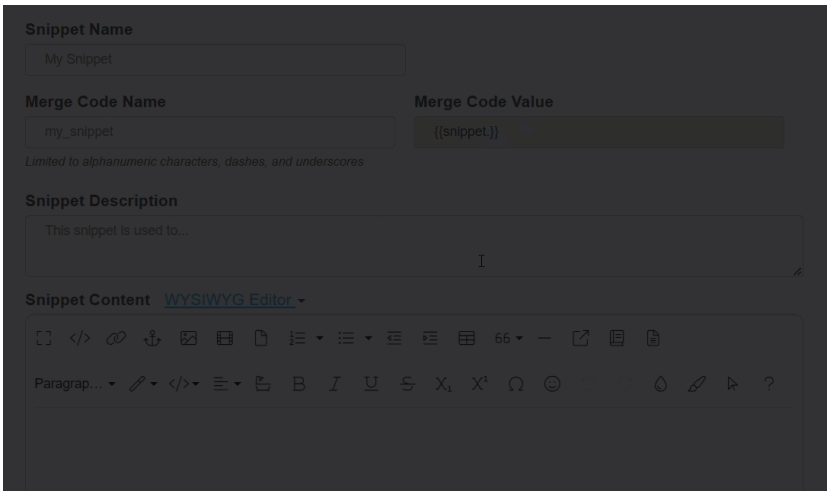
But if you'd prefer to have the ratings section only in a small number of specific articles, you can remove the template from your articles overall and then add it only to the articles you want. We recommend using a snippet for this so you don't have to remember the template merge code.

First, let's remove the template from all articles:

1. Go to **Settings > Style**.
2. In the **Customize HTML, CSS, and JS** section, select **Custom HTML**.
3. Select **Article** from the **Select HTML section to edit** dropdown.
4. Delete `[template("rating")]` at or around row 19.
5. **Save** your changes.

Now let's create a snippet that contains the template so you can add it to the articles you'd like:

1. Go to **Library > Snippets**.
2. Select **+ Create New Snippet**. If you're not familiar with creating snippets, refer to **Creating a snippet**.
3. Enter a **Snippet Name**, like `Article Rating section`.
4. Enter a **Snippet Description**, like `Add this snippet to articles to display the ratings section`.
5. Select the **Snippet Content** dropdown and select **Code Editor**.



6. Copy the code below and paste it into the code editor:

```
[template("rating")]
```

7. Select **Create** to finish creating your snippet.

Now you can insert the snippet into the bottom of any article where you want the ratings section displayed.

Ratings reporting

Last Modified on 05/29/2024 5:27 pm EDT

You can obtain a report on article ratings from **Reporting -> Dashboard**.

Note: You must have the Ratings feature enabled and the ratings template added to your knowledge base for this report to work.



Sample Article Ratings report

The Article Ratings report displays all articles and categories that have received a rating. It allows for sorting. The layout will look a little different depending on which rating scale you've selected:

- Thumbs Up / Down displays a column for each
- Star Rating displays the average rating out of 5 stars

Articles are displayed with the full title; categories are displayed with a folder to the left of the full title.

You can reset ratings for individual articles or your entire knowledge base: see Reset article ratings for complete instructions!

Resetting an article's ratings will permanently delete all existing ratings from the dashboard and the Export to CSV export. This action cannot be undone.

The table will show 10 articles at a time; to view the full list at once, use the Export to CSV link next to the

Article Ratings header.

Reset article ratings

Last Modified on 05/29/2024 5:28 pm EDT

Once you're using article ratings, there may be times when you want to be able to reset an article back to zero ratings. This might be:

- When you publish a new version, to ensure that all ratings apply only to the latest version.
- On a set schedule, depending on your quality control processes.

From **Reporting > Dashboard**, you can delete all article ratings:

- For an individual article
- For all articles' ratings, ever



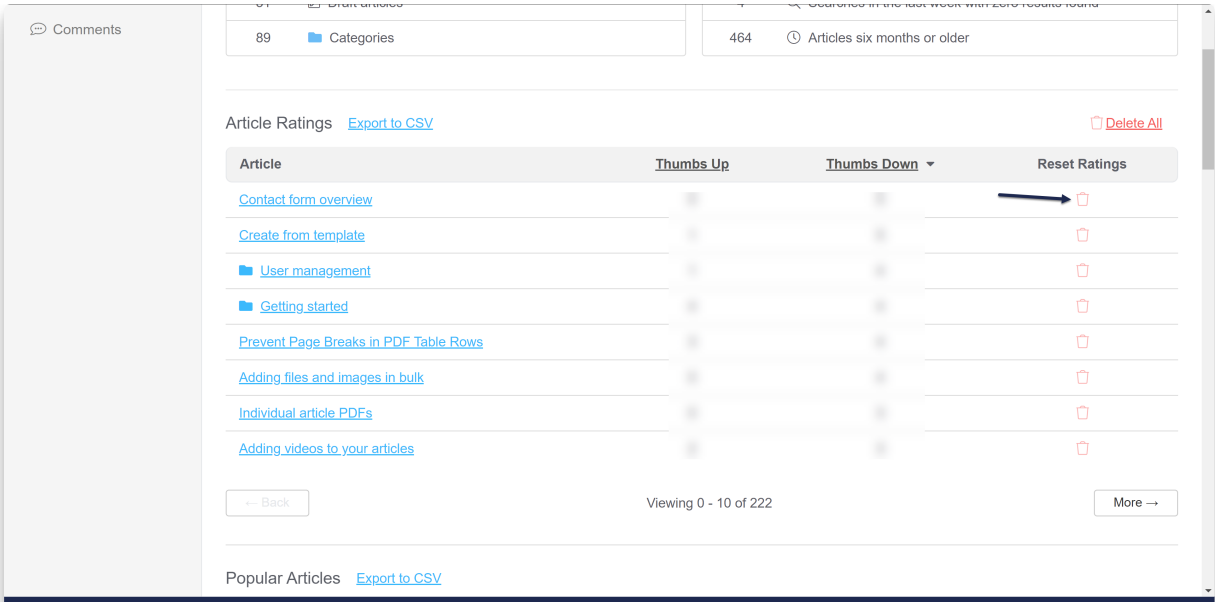
Resetting an article's ratings will permanently delete all existing ratings from the dashboard and the Export to CSV export. **This action cannot be undone!**

Our default **Editor** role has permission to reset article ratings. If you're using a custom author role, that role must have the Dashboard Permissions to **Reset individual article ratings** and **Reset all article ratings**, respectively.

Delete an individual article's ratings

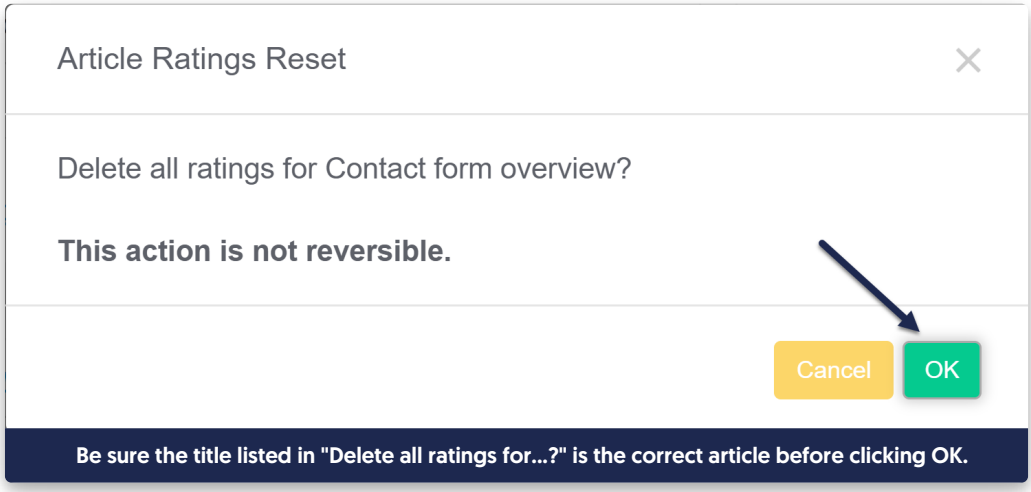
To delete all ratings for an individual article:

1. Go to **Reporting > Dashboard**.
2. In the Article Ratings Report, find the article whose ratings you'd like to reset.
3. Click the **Reset Ratings** trashcan in the row of that article.



Click the Reset Ratings trashcan to delete all ratings. Here, we're deleting them for Contact form overview.

4. This will open a pop-up which will confirm the name of the article whose ratings you're trying to reset. Be sure the article named there matches what you're looking for. If it does, click **OK**.



Be sure the title listed in "Delete all ratings for...?" is the correct article before clicking OK.

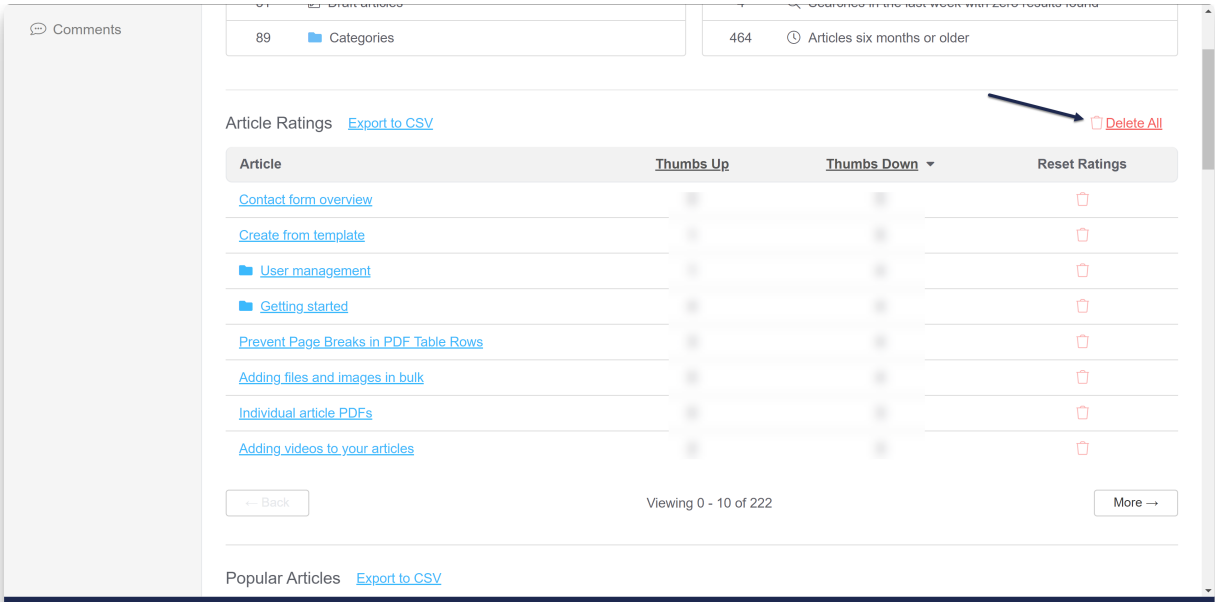
5. The ratings will be removed from the dashboard as well as the Export to CSV option in the dashboard.

Delete all articles' ratings

Resetting all articles' ratings will permanently delete all existing article ratings from the dashboard and the Export to CSV export. This action cannot be undone!

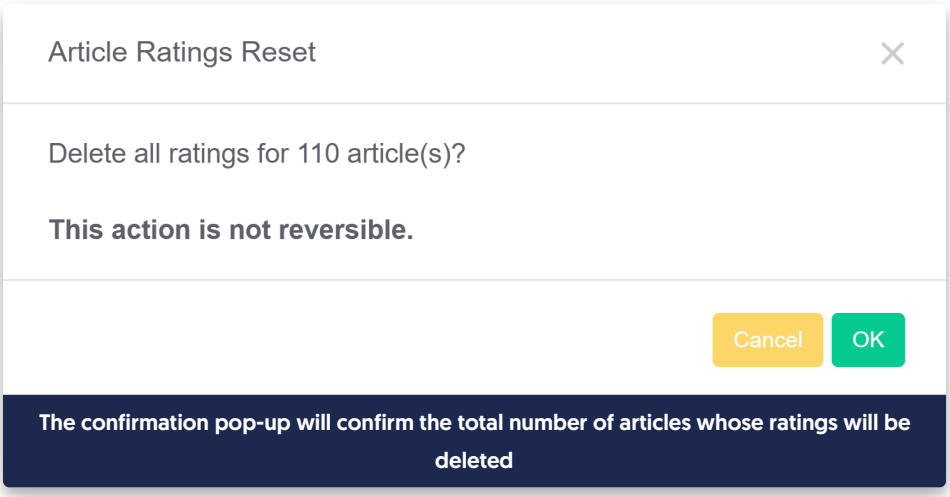
To delete all ratings for all articles:

1. Go to **Reporting > Dashboard**.
2. In the Article Ratings Report, click the **Delete All** link in the upper right.



Click the Delete All link

3. **This will open a pop-up which will confirm the number of articles whose ratings you are resetting. If you wish to continue, click OK. This action cannot be undone.**



The confirmation pop-up will confirm the total number of articles whose ratings will be deleted

4. **The ratings will be removed from the dashboard as well as the Export to CSV option in the dashboard.**

Disable ratings

Last Modified on 05/29/2024 5:28 pm EDT

You can check the box next to **Remove feedback ability** in the **Restrictions** section of the editor to disable ratings in individual articles.

But if you'd like to remove ratings completely from your knowledge base:

1. Go to **Settings > Style**.
2. Below the Preview pane, be sure **Custom HTML** is selected.
3. Select **Article** from the Custom HTML dropdown.
4. Scroll to the bottom of the HTML. Find the line that contains `[template("rating")]`:



5. Delete that line completely. Your HTML should look something like this now:



6. Be sure to **Save** your changes.



If your knowledge base is using a layout that displays the **Right Column**, that ratings template may also have been added there. You can adjust the Custom HTML dropdown to **Right Column** and remove the same template from there.

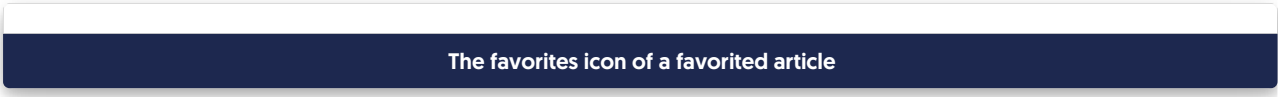
Article favorites feature overview

Last Modified on 12/03/2024 2:53 pm EST

Use case

If you use individual reader accounts (either directly within KnowledgeOwl or via Single Sign-on or remote authentication), article favorites can be a real cloud-pleaser.

With this feature turned on, your readers and authors can favorite up to 50 articles by selecting an icon next to the article title. This makes it easy for them to quickly jump to the articles they use the most.



The favorites icon of a favorited article

Setup notes

You can choose to display these favorites in a few places in your knowledge base, including the table of contents, an article list you can add to your homepage, or a top navigation link to jump to the Favorite Articles page.



Sample Favorites section in the table of contents

By default, the feature uses a star icon next to the article title, but you can Change the favorites star icon to something else, like a bookmark!

Don't like the word "Favorite"? You can also customize the default text to use terminology that makes sense to you (like Bookmarks, for example).

Start using favorites

Follow instructions in Set up favorites to make sure favorites are displayed where and how you want.

And grab the instructions outlined in Add and access favorite articles to share with your readers so they can get the most out of favorites!

Enable favorites

Last Modified on 11/29/2024 12:55 pm EST

Getting favorites fully set up is a two-step process, in which you:

1. Enable favorites if it's not already. (It's enabled by default for most new knowledge bases).
2. Choose where you'd like to display favorites in your theme:
    a. Add it to the table of contents. (Also enabled by default for most new knowledge bases.)
    b. Use a merge code to add a shortened Favorites article list to your homepage or right column.
    c. Create a navigation link to take readers directly to the Favorite Articles page.

Below, we walk through step 1. Refer to the linked resources above for the different options in step 2.

> Authors with the default Editor role can enable article favorites. If you're using a custom role, you'll need to have the **Admin** Permission to Update article favorites settings.

To enable favorites in your knowledge base:

1. Go to **Settings > Article favorites**.
2. Check the **Enable article favorites** checkbox to turn the feature on.
3. While you're here, if you'd like to add favorites to your table of contents,check the **Show article favorites in the table of contents** checkbox. (Refer to Display favorites in the table of contents for more information.)
4. Be sure to **Save** your changes.

Use the **View knowledge base** or **View article** options to view an article in your live knowledge base. If you see a star icon, congratulations: Favorites are enabled!



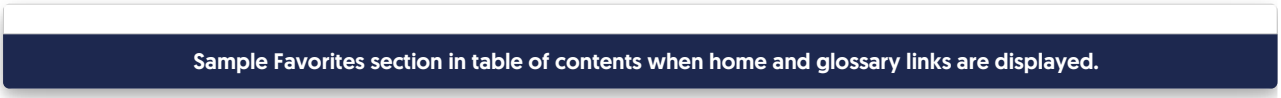
If you don't see the star icon next to an article title when you're logged into the knowledge base, your knowledge base's theme likely pre-dates the release of this feature. Refer to Fix missing favorites icon for additional configuration steps.

Display favorites in the table of contents

Last Modified on 11/29/2024 1:03 pm EST

Want your readers to have quick access to all of their favorites? Add them to your table of contents. This will add a Favorites section to the top of the table of contents, above your content hierarchy, and will display all the articles a reader has favorited (up to 50).

If you have the **Settings > Basic** options enabled to add a search bar, homepage link, or glossary link to the table of contents, the Favorites section displays below those:



Sample Favorites section in table of contents when home and glossary links are displayed.

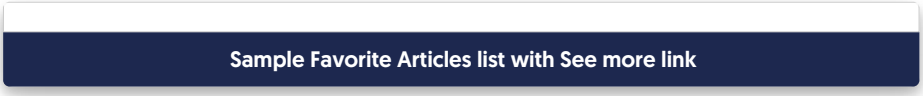
To add Favorites to your table of contents:

1. Go to **Settings > Article favorites**.
2. Check the box next to **Show article favorites in the table of contents**.
3. Be sure to **Save** your changes.

Display favorites outside the table of contents

Last Modified on 11/29/2024 1:13 pm EST

Besides adding Favorites to your table of contents, you can also add the Favorites article list to various areas of your theme using the merge code displayed on **Settings > Article favorites**.



This list displays up to 10 article favorites, not the full 50 that are available. A **See more...** link at the bottom of the list opens the Favorite Articles page, which will list them all (with pagination).

To add this list, you'll need to add the merge code for the list into your knowledge base's HTML somewhere.

Consider adding this merge code in one of these places:

- To the footer of all articles, similar to the Related Articles section, in **Settings > Style, Custom HTML** in either the **Body** or the **Article** template.
- If your knowledge base is older and has had minimal customizations, most of your homepage likely lives in the top-level **Homepage** in the lefthand navigation. You can add a section for your Favorites here.
- If your knowledge base is from at least October 2022 and/or has had theme customizations, your homepage code likely lives in **Settings > Style, Custom HTML > Homepage**. You can add a section for your Favorites here.
- If you are using an older layout that includes the Right Column, you can add a section to your **Settings > Style, Custom HTML > Right Column** for your favorites.

Below, we'll walk through a couple of these as examples (**Homepage** custom content and some **Settings > Style** options). For all options, you can control the number of favorites displayed in the list, too.

Add Favorites to Homepage custom content

If the body of your homepage is set in the top-level **Homepage** custom content, you can replace one of the existing article lists with the Favorites list, or add the Favorites list on as an additional section.

Replace existing article list with Favorites

To replace an existing article list with Favorites:

1. Go to **Homepage**.
2. Find the list you'd like to replace. In this example, we'll replace the Popular Articles list. Here's what that looks like before we make any changes:



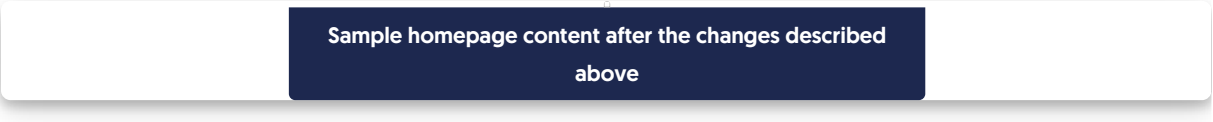
3. Each pre-built article list has a template below it. For example, for the Popular Articles list, this is `[template("pop-articles")]`.
4. Copy the merge code below and paste it in to replace the existing list merge code:

```
[reader("favorite-articles")]
```

5. Update the heading for the article list to use the Customize Text merge code for the Favorites list:

```
[translation("article-lists:favorite-articles")]
```

6. Your homepage might now look like this:

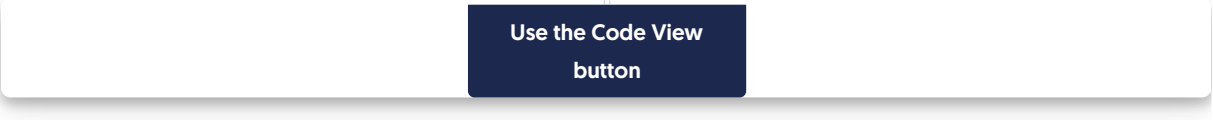


7. You can **Preview** your changes to be sure they look good.
8. Be sure to **Save** your changes once you're done.

Add new article list section for Favorites

To add the Favorites article list without replacing an existing article list:

1. Go to **Homepage**.
2. In the upper left of the editor, select the </> button to toggle to Code View.



3. The existing article lists are each set up within a div with class="col-md-4 col-sm-6", which helps handle the spacing. Your code should look something like this:

```
<div>[template("icon-cats,max=8,col=4,desc=0")]</div>
<div class="homepage-widgets row">
    <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:popular-articles")]</h3>[template("pop-a
    <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:new-articles")]</h3>[template("new-artic
    <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:updated-articles")]</h3>[template("up-a
</div>
```

4. Copy the code below and paste it in wherever you'd like the Favorites article list to appear:

```
<div class="col-md-4 col-sm-6"><h3>[translation("article-lists:favorite-articles")]</h3>[reader("favorite-ar
```

5. For example, if you add the Favorites articles section after the other articles lists, your code should should look a bit like this once you're done:

```
<div>[template("icon-cats",max=8,col=4,desc=0")]</div>
<div class="homepage-widgets row">
    <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:popular-articles")]</h3>[template("pop-a
    <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:new-articles")]</h3>[template("new-artic
    <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:updated-articles")]</h3>[template("up-a
    <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:favorite-articles")]</h3>[reader("favorite
</div>
```

6. By default, this setup will bump the fourth list onto a new row. If you'd rather shrink all your lists a little so that you can fit all 4 onto a single row on medium to large screens, you can adjust the div class for *all* the article lists to `col-md-3` instead of `col-md-4`. That would look something like this:

```
<div>[template("icon-cats",max=8,col=4,desc=0")]</div>
<div class="homepage-widgets row">
    <div class="col-md-3 col-sm-6"><h3>[translation("article-lists:popular-articles")]</h3>[template("pop-a
    <div class="col-md-3 col-sm-6"><h3>[translation("article-lists:new-articles")]</h3>[template("new-artic
    <div class="col-md-3 col-sm-6"><h3>[translation("article-lists:updated-articles")]</h3>[template("up-a
    <div class="col-md-3 col-sm-6"><h3>[translation("article-lists:favorite-articles")]</h3>[reader("favorite
</div>
```

7. You can **Preview** your changes to see what they look like.
8. Be sure to **Save** once you've finished making changes!

Add Favorites to Settings > Style

If your homepage code is not in **Homepage**, it will be in **Settings > Style**. If you'd like to add your Favorites section to your Right Column, you'll also head to **Settings > Style**.

For homepage adjustments here, you can follow the same basic steps whether you're editing the Right Column or the Homepage, but you'd select the appropriate area in the Custom HTML dropdown.

Here, we'll walk through the Homepage:

1. Go to **Settings > Style**.
2. Below the Preview pane, be sure **Custom HTML** is selected.
3. Select **Homepage** from the Custom HTML dropdown.
4. In this Custom HTML, you can either edit one of your existing article lists to change it to Favorites, or add a new section. The same basic steps are followed as in the **Homepage** instructions above, though there is no WYSIWYG in this view.
5. To edit an existing article list:
    a. Locate the div with class="homepage-widgets", which is usually on row 9. That's where new knowledge bases get the article lists added. Your code should look something like this:

```
<div class="homepage-widgets row">
   <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:popular-articles")]</h3>[template("p
   <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:new-articles")]</h3>[template("new-
   <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:updated-articles")]</h3>[template("u
</div>
```

b. Locate the article list you'd like to repurpose. Here, we'll replace Popular Articles, in row 2 of the code sample above.

c. Remove the text or merge code between the `<h3>` and `</h3>` tags that was your previous list's title. Replace it with the Customize Text merge code for the Favorites list:

```
[translation("article-lists:favorite-articles")]
```

d. Delete the template merge code that comes after that text, beginning with the [and ending with the]. So you should go straight from the `</h3>` to the `</div>`.

e. Leave your cursor between the `</h3>` and the `</div>`

f. Copy this merge code and paste it in there:

```
[reader("favorite-articles")]
```

g. Your code should now look like this:

```
<div class="homepage-widgets row">
   <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:favorite-articles")]</h3>[reader("fav
   <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:new-articles")]</h3>[template("new-
   <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:updated-articles")]</h3>[template("u
</div>
```

h. You can **Preview** your changes; just be sure to **Save** them once you're done!

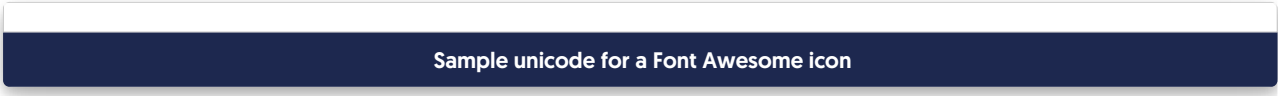
6. To add to your existing article lists, copy one of the full divs for an article list and paste it where you'd like to add the Favorites. Then proceed with replacing the text and merge code as in the steps above. If you already have three article lists and you're adding a fourth, you can consider adjusting all the article lists to use `col-md-3` instead of `col-md-4` to get them to fit on a single row.

Change the favorites star icon

Last Modified on 11/29/2024 1:18 pm EST

If you don't want to use the star for your Favorites icon, you can change that action to a different icon by adding a little Custom CSS to your knowledge base.

Before you make this change, you'll need to select a new icon to use. We recommend using Font Awesome icons. Once you find the icon you'd like to use, you'll need to copy the Unicode for it. In Font Awesome, the Unicode value is listed once you view the details for an icon:



Once you have located the icon and the Unicode you'd like to use, in KnowledgeOwl:

1. Go to **Settings > Style**.
2. Below the Preview pane, in **Customize HTML, CSS, and JS**, be sure **Custom CSS** is selected.
3. Copy the CSS below and paste it in to your Custom CSS. (If you're not sure where to put it, the bottom is usually a safe choice!)

```
/* Change favorites icon from star to bookmark */
i.favorite-article-icon:before {
  content: "\xxx"; /* icon unicode value */
}
```

4. Update the content `"\xxx"` value in row 3 to the Unicode for the icon you selected. Be sure you keep the \ at the start and keep the whole value in quotes. For example, here we replace the icon with a bookmark, whose unicode value is f02e:

```
/* Change favorites icon from star to bookmark */
i.favorite-article-icon:before {
  content: "\f02e"; /* bookmark icon unicode value */
}
```

5. You can **Preview** your changes to see how they look.
6. Be sure to **Save** your changes once you're satisfied with the icon you've selected!

Change how many favorites are displayed in the Current reader's favorites article list

Last Modified on 11/29/2024 11:59 am EST

Like other article lists, you can set the total number of favorites displayed in the list across your knowledge base, from 1-10.

To do so:

1. Go to **Settings > Basic**.
2. In the **Article list settings** section, use the **Current reader's favorites** dropdown to change the number of articles displayed. (It defaults to 10, the maximum number of favorites a reader can have.)
3. Be sure to **Save** your changes once you're done making them.

Add a top navigation link to the Favorite Articles page

Last Modified on 11/29/2024 12:23 pm EST

The Favorite Articles page displays the current reader or author's favorited articles, ten articles at a time.

It's accessed at `/favorite-articles` in your knowledge base. So for example, logged-in readers could access the Favorite Articles page for this Support KB at `https://support.knowledgeowl.com/help/favorite-articles`.

By default, the only hyperlink to this page is in the **See more...** link in the Favorite Articles article list.

If you'd like to add a link to it in the top navigation of your knowledge base:

1. Follow the general instructions in Add a link to the upper right (top navigation).
2. Instead of copying the sample code in step 5 from those instructions, copy this code instead:

```
<li><a class="hg-header-link" href="https://support.knowledgeowl.com/help/favorite-articles">Link title</a></li>
```

3. If your knowledge base uses the `/home/` or `/docs/` root path, replace `help` in the href with the root path you use.
4. Adjust the "Link title" to be the text you'd like displayed.
5. Be sure to **Save** your changes.

Fix missing favorites icon

Last Modified on 11/29/2024 12:56 pm EST

Follow these instructions only if you've already Enabled favorites, viewed an article as a logged-in reader or author, and aren't seeing the favorites star icon next to the article title.

Once you've turned on favorites, if you don't see the star icon next to article titles, you're likely using an older knowledge base whose theme pre-dates the release of Article Favorites. Never fear, we just need to get your theme updated so it knows Favorites exists!

To do so:

1. Go to **Settings > Style**.
2. In the **Customize HTML, CSS, and JSS** section, be sure **Custom HTML** is selected.
3. In the **Select HTML section to edit** dropdown, select **Article**.
4. Look for the `h1 class="hg-article-title"`, usually around row 3 in the Custom HTML. If you don't see `article("action_icons")`, we need to make more changes. Your HTML likely has a `span class="ko-article-actions"`, something like this:

```
<div class="hg-article">
   <div class="hg-article-header">
    <h1 class="hg-article-title">[article("title")]<span class="ko-article-actions"><span class="pdf">[article("pdf_download_tool")]</span><a href="#" class="ko-js-print"><i class="fa fa-print fa-fw"></i></a><a href="#" onclick="javascript:window.location='mailto:?subject=[article("title")]&body=' + window.location;"><i class="fa fa-envelope-o fa-fw"></i></a></span></h1>
      <div class="metadata">
```

5. You have two options:
   a. *Recommended:* Highlight all of the HTML for the ko-article-actions span, remove it, and replace it with the `article("action_icons")` template. For more detailed instructions, refer to Update your article actions merge code.
   b. If you don't want to touch that HTML due to existing customizations, add a new merge code into the HTML to enable the favorites icon:
      i. Copy the merge code below:

```
[article("favorites_action")]
```

      ii. Look for the final `</span>` before the `</h1>` tag (row 3 usually wraps onto multiple lines, this should be right at the end of the final wrapped line). Paste the merge code in between the

`</a>` and the `</span>`. Our code sample from above now looks like this:

```
<div class="hg-article">
   <div class="hg-article-header">
     <h1 class="hg-article-title">[article("title")]<span class="ko-article-actions"><span class="
pdf">[article("pdf_download_tool")]</span><a href="#" class="ko-js-print"><i class="fa fa-prin
t fa-fw"></i></a><a href="#" onclick="javascript:window.location='mailto:?subject=[article("titl
e")]&body=' + window.location;"><i class="fa fa-envelope-o fa-fw"></i></a>[article("favorites_
action")]</span></h1>
      <div class="metadata">
```

6. You can **Preview** your changes to be sure they look good.
7. Just be sure to **Save** your changes once you're done!

Use **View "My KB"** at the top of the Style page and navigate to an article. If you've done everything correctly, you'll now see the favorites star icon:



If you're still not seeing the star icon, contact us for help.

Add an article to your favorites

Last Modified on 11/29/2024 11:41 am EST

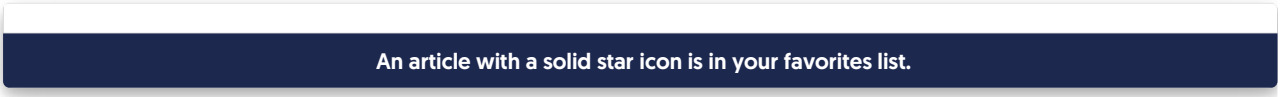
All favorites are tied to an individual reader or author's account, so each of you can control what you see in this list.

To add an article to your favorites, you must be logged in to the knowledge base. (For authors, the fastest way to do this is to select **View knowledge base** or **View article**).

Select the star (or whatever icon you've replaced it with) next to the article title:



Favorited articles will have a filled-in icon:



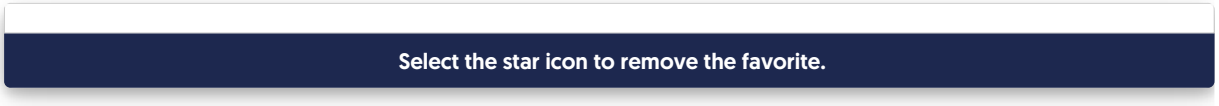
You can favorite up to 50 articles. Once you have reached that maximum, you won't be able to favorite any more.

Remove an article from your favorites

Last Modified on 11/29/2024 11:41 am EST

To remove an article from your favorites:

1. Open the article.
2. The star (or other icon) next to the article's title should be filled in if the article's in your favorites list:



3. Select it once. The icon returns to an outline-only state. It's now removed from your favorites.



Reorder your favorites

Last Modified on 11/29/2024 11:41 am EST

Your favorites will display in the order you added them, with the most recent at the top of the list.

To change the order, unfavorite and refavorite articles until you get the order you want.

Access your favorite articles

Last Modified on 11/29/2024 11:52 am EST

Access favorite articles in several ways, depending on how your knowledge base has been configured:

1. The **Favorites** section of the table of contents
   This section shows your entire Favorites list (up to 50 articles), with the most recently favorited first.

   > This access method requires that the **Enable article favorites in the table of contents** setting is turned on for the knowledge base. Refer to Display favorites in the table of contents for more detailed instructions.

2. The Favorite Articles list, usually on the homepage or right column
   This article list shows up to 10 of your favorite articles with a **See more...** link to view the full list.

   > An administrator must add this article list to your knowledge base layout for you to use this access method.

3. The **Favorites** page
   This page displays your full Favorites list, 10 articles at a time. It matches the order of the table of contents display and is opened from the **See more...** link in the Favorites article list. The page is always available to logged-in readers and authors at `/favorite-articles` in your knowledge base.

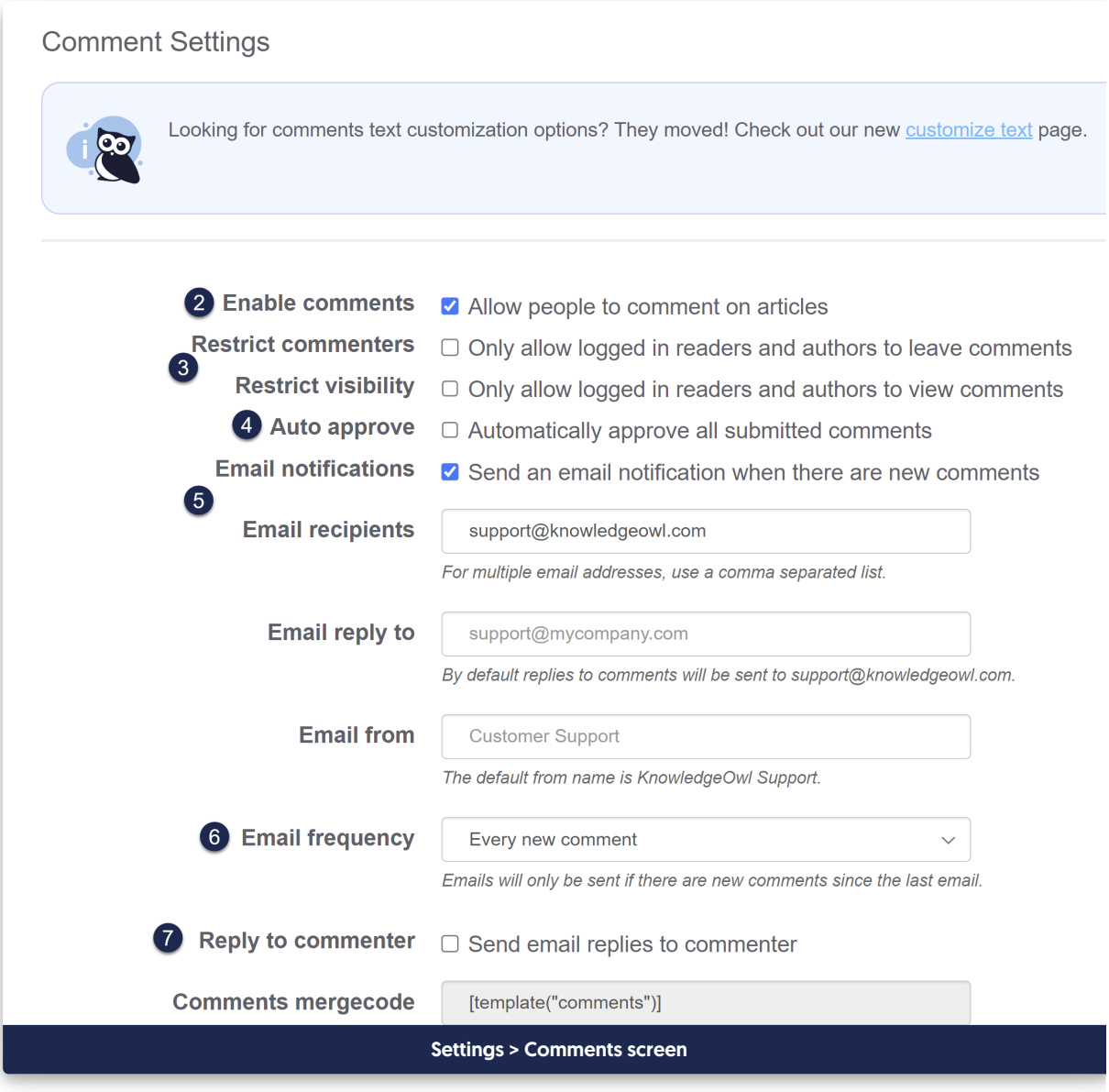
Enable and configure comments

Last Modified on 05/29/2024 5:28 pm EDT

By default, your knowledge base will come with Comments enabled. If you need to re-enable comments in a knowledge base that's had them disabled--or if you want to learn more about the various settings available within comments--follow the instructions below!

To enable Comments in your knowledge base:

1. **Go to Settings > Comments.**
2. **Select the checkbox next to Enable comments to "Allow people to comment on articles."**



Settings > Comments screen

3. **Restrict commenters sets who can physically comment on your knowledge base; Restrict visibility sets who can see those comments. See Comment restrictions and permissions for more detail on each option.**

4. By default, all comments are set to require approval before they'll be displayed. If you'd prefer all comments be automatically approved (and displayed) as soon as they've been submitted, check the box next to **Auto Approve**.

5. Comments are automatically shown in the Comments reporting dashboard. If you'd also like to send email notifications to particular address(es) when comments are submitted, check the box next to **Email Notifications** and add the email addresses you'd like to send to in the **Email Recipients** list.
    - You can also choose to adjust the **Email Reply To** and **Email From** fields so that they aren't coming from Knowledge Support (support@knowledgeowl.com).

6. Email notifications of new comments will default to an **Email Frequency** of Every new comment. You can change this frequency to Hourly, Daily, or Weekly digests.



You can customize all the text shown in the Comments section in **Tools > Customize Text** in the **Article** knowledge base section. Learn more.

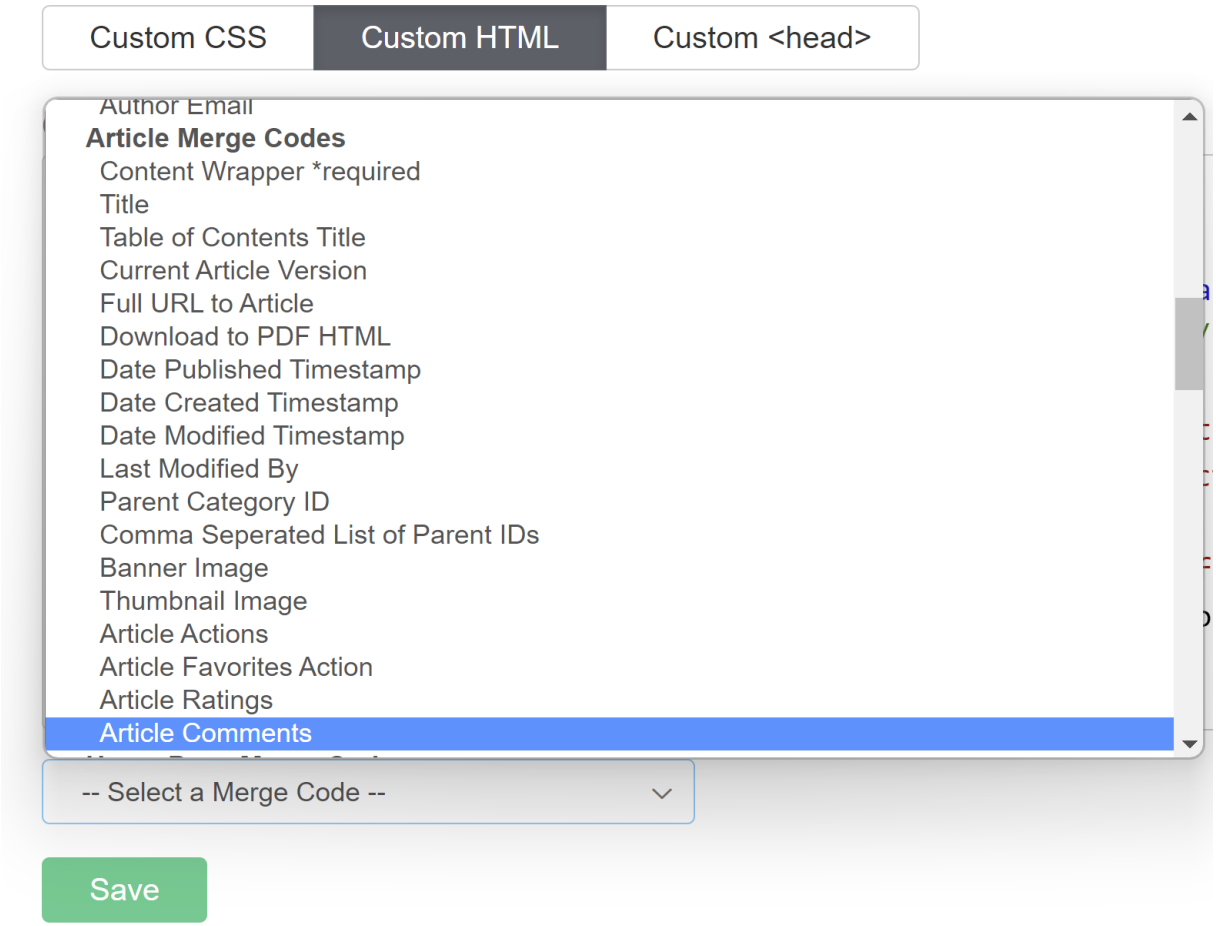
7. If Email Frequency is set to "Every new comment", the **Reply to commenter** option appears.
    a. When unchecked, comment notification emails will use the **Email reply to** field as the reply-to address.
    b. When checked, comment notification emails will use the commenter's own email as the reply-to address. This is a great setting to use if you're feeding comment notifications into a help ticketing/support desk system!

8. Be sure to **Save** your changes.

If you're re-enabling comments in a knowledge base, you may need to re-add them to one of your Custom HTML templates to have them fully display. While you can add them anywhere, we recommend adding them either into the Article footer or the Right Column (if you're using it).

To add to the Article footer:

1. Go to **Settings > Style.**
2. Below the preview pane, be sure **Custom HTML** is selected.
3. Select **Article** from the Custom HTML dropdown.
4. Click the *Select a Merge Code* dropdown, find the **Article Merge Codes** section, and select **Article Comments.**



5. **Click to put your cursor where you want to add the comments section (in the hg-article-footer is a great place!) and click the Insert button to add the merge code. (You can always move the merge code around in the HTML to get it exactly where you want.) You can see where we put the comments section by default in Default Article HTML.**

6. **You can Preview your changes (be sure you're looking at an Article in preview though!)**

7. **Once you're satisfied with your changes, be sure to Save.**

Your comments section is now live!

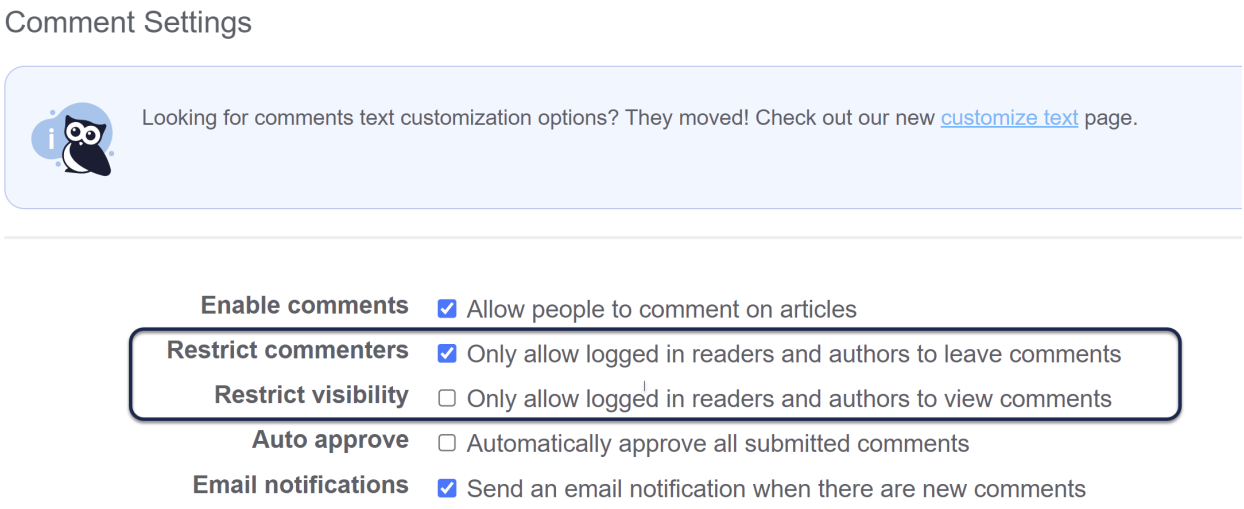
Adding comments into the right column is a similar process, but you may want to create a separate right-col-panel div to add it into--it depends on how your right column is laid out!

Comment restrictions and permissions

Last Modified on 05/29/2024 5:27 pm EDT

You can choose who can comment on articles and who can view those comments. The two main groups are:

- **Allow everyone, whether logged in or not**
- **Allow only logged-in readers and/or authors**



There are two settings here you may want to explore, to restrict commenters or restrict visibility:

- **Restrict commenters sets who can actually comment on your articles. When checked, only authors and readers who are logged in to your knowledge base are allowed to leave comments. Anyone who is not logged in won't be able to submit comments.**
  - **If you have a private domain and you are using reCAPTCHA spam protection, you must have reCAPTCHA V2 site and key added in Settings > Basic > Spam Protection Settings to uncheck this box. See Add reCAPTCHA for more details.**
- **Restrict visibility sets who can view comments. When this box is checked, only authors and readers who are logged in to your knowledge base will be able to view comments. People not logged in will not see comments at all.**

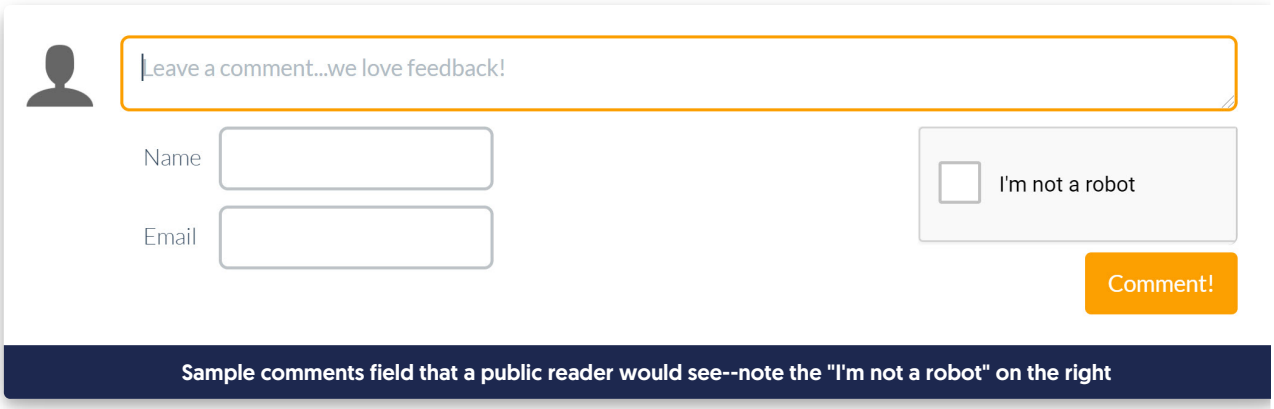
Comment security

Last Modified on 05/29/2024 5:27 pm EDT

Comments have some built-in security measures to prevent issues such as spam, abusive comments, or private information from being posted for all to see. Public commenters must pass the robot test. By default, all comments go into a moderation queue for approval; only approved comments are shown.

SPAM, reCAPTCHA, or the Robot Test

Spam is mostly a concern with comments on publicly accessible knowledge bases. To combat spam, we've added reCAPTCHA when folks who are not logged in comment. Most of your commenters will be able to comment by clicking a box confirming they are, in fact, not a robot. If reCAPTCHA notices anything fishy, the commenter will have to perform an additional task that robots would have a difficult time performing but are fairly straightforward for humans.



Sample comments field that a public reader would see--note the "I'm not a robot" on the right

Logged in readers and authors will not see reCAPTCHA.

If you're using a KnowledgeOwl subdomain (such as my-amazing-kb.knowledgeowl.com), reCAPTCHA is handled as part of our knowledgeowl.com domain. If you're using a private domain, you'll need to configure reCAPTCHA for your domain.

View comments pending approval

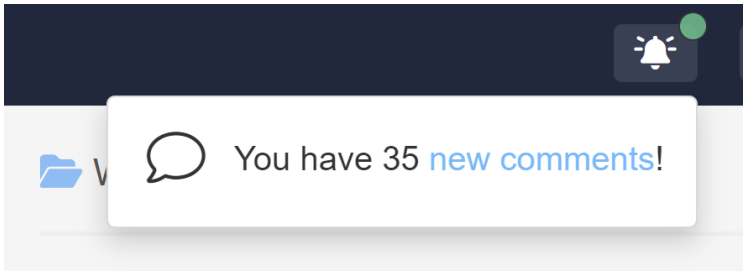
Last Modified on 05/29/2024 5:27 pm EDT

There are two ways you'll know about new comments:

- You'll see a green dot in the notifications area in the KnowledgeOwl banner.



  If you click on the bell icon, a message will tell you how many comments you have, and you can click the **new comments** link to jump directly to **Reporting > Comments:**



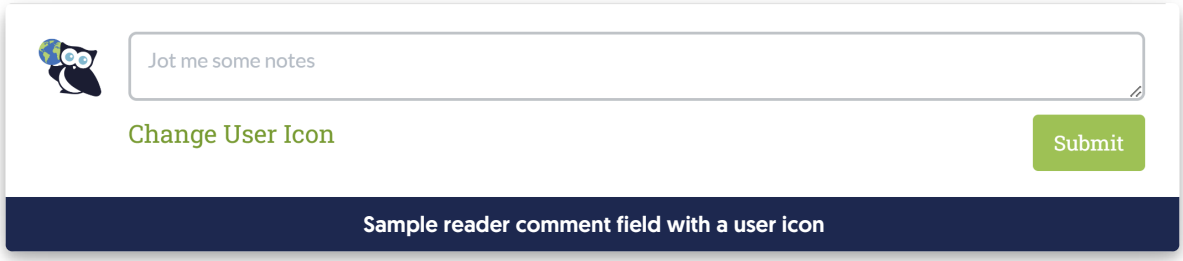
- If you've enabled email notifications for comments in **Settings > Comments**, the email address(es) you've added will receive an email based on the **Email frequency** you've selected. See Enable and configure comments for more details.

Only approved comments will show in your knowledge base.

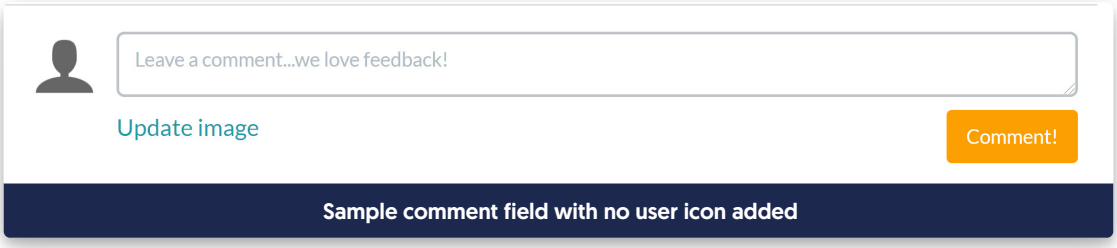
Commenter icons / images / avatars

Last Modified on 05/29/2024 5:27 pm EDT

Comments include not only the name of the commenter but also an image. This is the default image and the image that will appear for public comments:



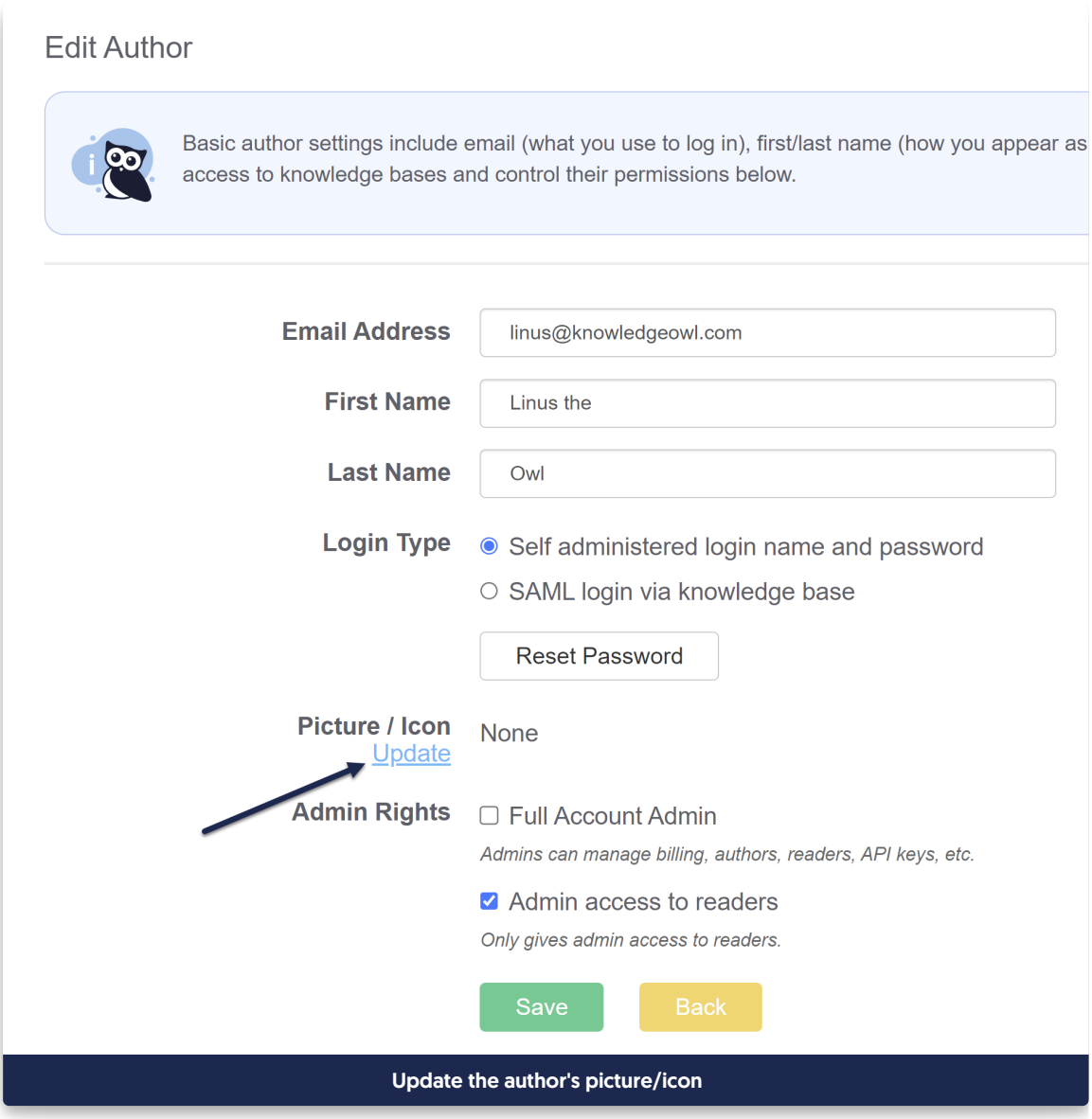
Sample reader comment field with a user icon



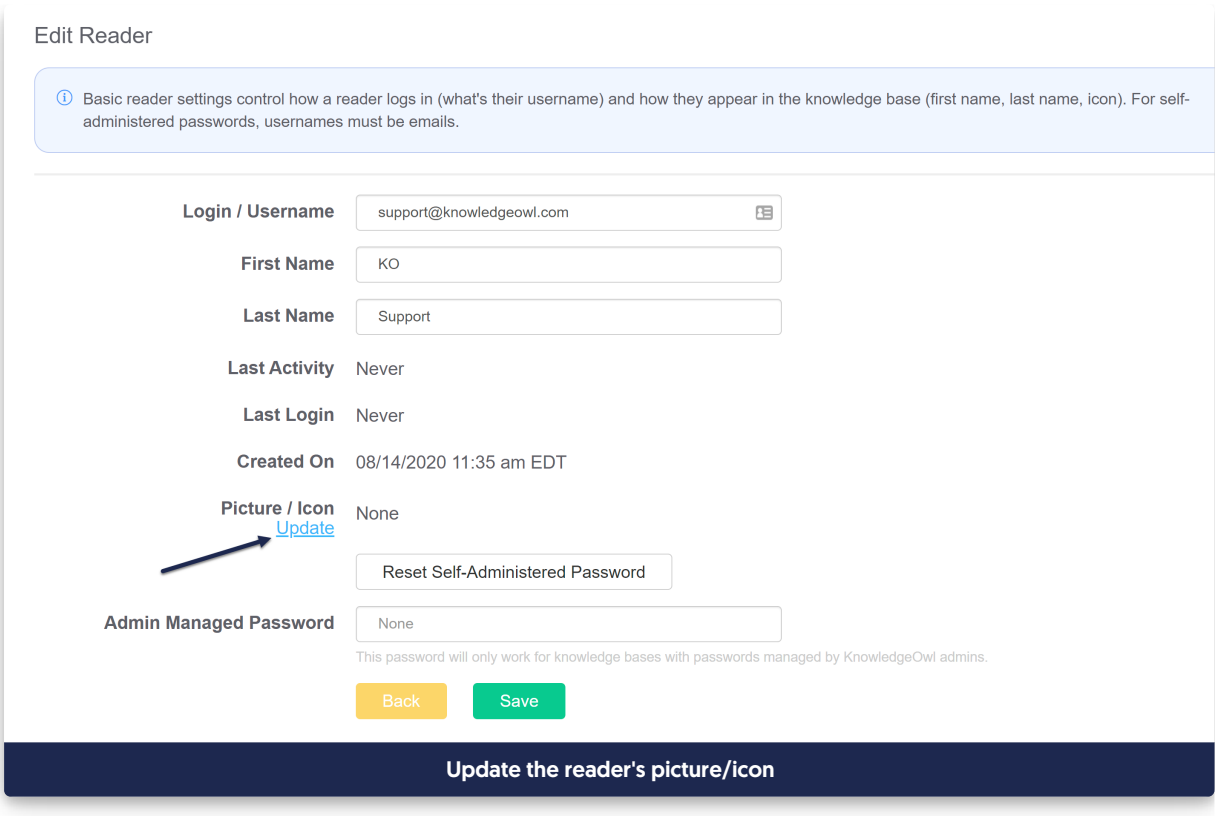
Sample comment field with no user icon added

Logged in authors and readers can customize this image:

1. When commenting, by clicking the **Update image** link (this text is customizable, so it might say something different in your knowledge base!)
2. For authors, by clicking on your **profile icon/name** in the upper right and either
    - Selecting **My Account** to update your own image, or
    - Selecting **Authors**, clicking on the author whose image you want to update, and updating their author profile



3. **Authors can also add images for readers by going to your profile icon/name in the upper right, selecting Readers, clicking on the Reader account, and updating the image in the reader's profile.**



Notice images showing up on their own?

If you see images appear before you upload them, don't panic! We are using Gravatar to display avatars for authors and readers who have set up a Gravatar in the past.

Limit the max characters allowed in comments

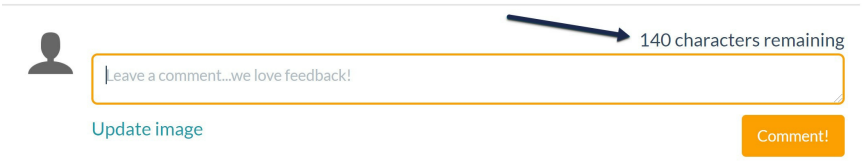
Last Modified on 05/29/2024 5:28 pm EDT

Are your readers writing their own version of War and Peace in your comments?



Comments can be useful, but if you're finding that people are sending inappropriately long comments, limiting them to a set number of characters can help encourage them to shorten things up.

We have a script you can adapt to limit the total number of characters for the comments and show commenters how many characters they have remaining.



To add this character limit to your comments:

1. **Go to Settings > Style.**

2. Below the preview pane, click on **Custom HTML** and select **Article** from the dropdown.

3. Copy the script below and paste it into the bottom of the Custom HTML:

```
<script>
 $(function(){
  //Set character limit on comments
  var maxchars = '300'; //Change this number to change the character limit
  $('.hg-comment-post textarea').before('<div class="text-right"><span id="remain">'+maxchars+'</span> ch
  $('.hg-comment-post textarea').keyup(function () {
      var tlength = $(this).val().length;
      $(this).val($(this).val().substring(0, maxchars));
      var tlength = $(this).val().length;
      remain = maxchars - parseInt(tlength);
      $('#remain').text(remain);
  });
 });
</script>
```

4. In row 4, change the number set for var maxchars to the number of characters you want to use. Be sure it stays in 'single quotes'.

5. **Save.**

Readers will be shown the maximum character count and it will count down as they type. They will not be able to type more than the allowed characters. It even works with copy and paste.



We've added the code to this page so you can see it in action. We set a limit of 140 characters so if you can't tweet it, it won't fit in a comment!

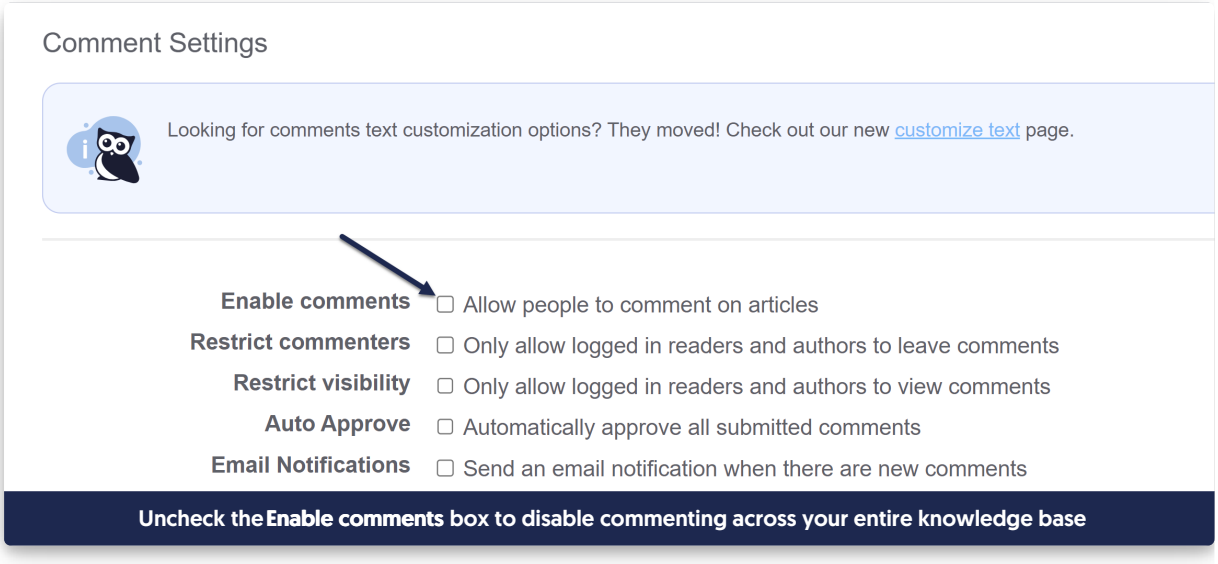
Disable comments in your knowledge base

Last Modified on 05/29/2024 5:28 pm EDT

You can disable comments for specific articles by checking the box next to **Remove comment ability** in the **Restrictions** section of the Article Editor.

But if you'd prefer to disable comments completely in your knowledge base:

1. Go to **Settings** > **Comments**.
2. Uncheck the box next to **Enable comments**.



3. Be sure to **Save** your changes.

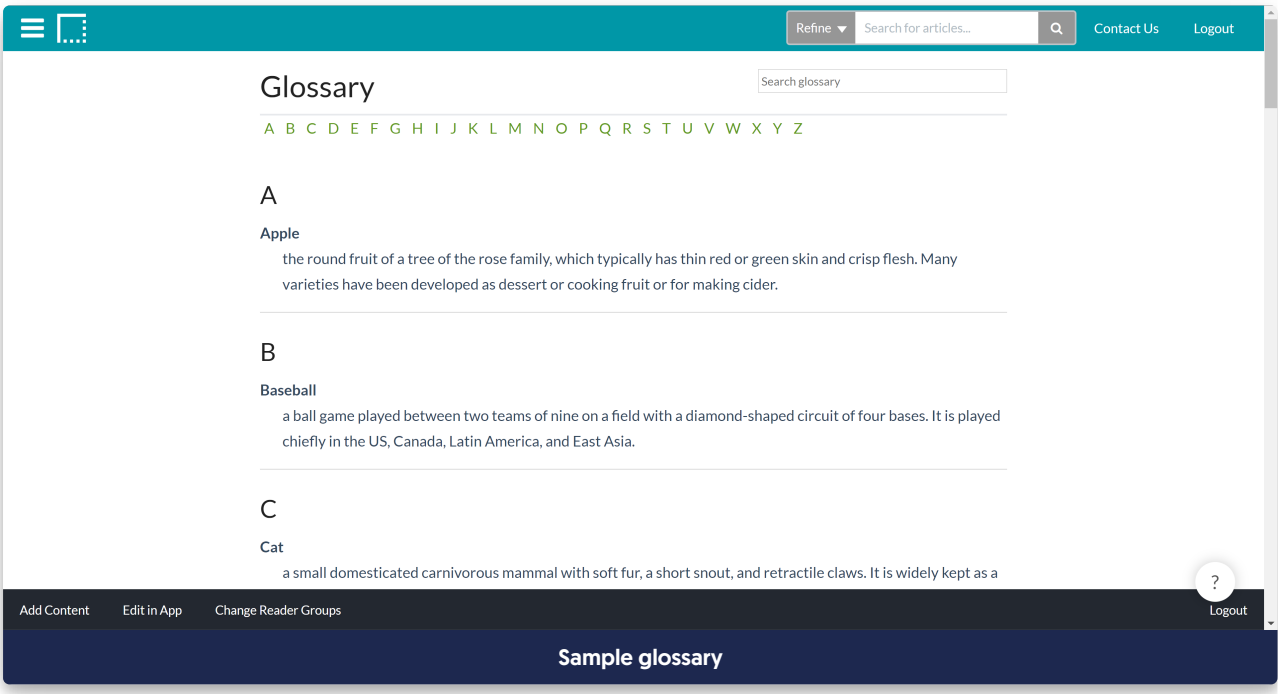
Any existing comments submitted while comments were enabled will still be available in **Reporting** > **Comments**.

Glossary overview

Last Modified on 05/29/2024 5:28 pm EDT

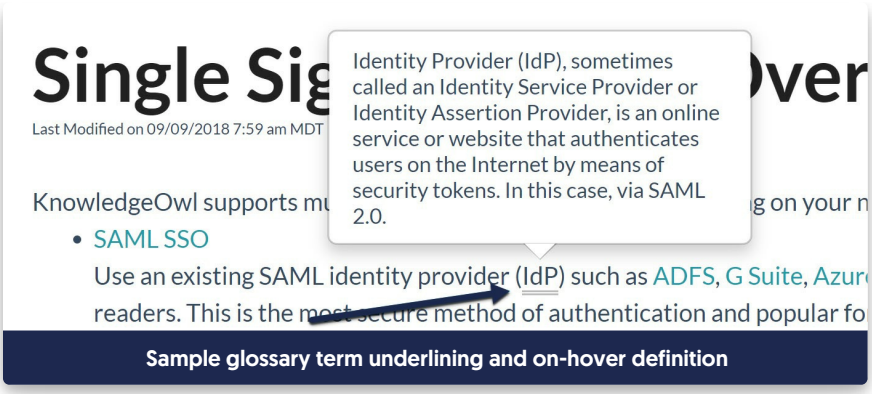
One of the challenges facing content creators is making sure that readers understand common terms, acronyms, and abbreviations without disrupting the flow of content. At its worst, editors are left defining a term once and linking back to that, or repeatedly manually adding definitions into the body of their articles by copying and pasting or retyping, which is either redundant work or potentially inconsistent work.

That's why KnowledgeOwl has a built-in Glossary (**Knowledge Base > Glossary**).



Here, you can define the terms, acronyms, and abbreviations used in your documentation. They're sorted and displayed alphabetically automatically. If you have terms beginning with numbers, these will be sorted and displayed first. Readers can view your full glossary and you can add a link to it to your table of contents. You can opt to automatically highlight glossary terms a set number of times in articles, or to manually insert definitions as you create content.

Highlighted glossary terms get a double underline in articles and the definition will appear in a pop-up when readers hover over that term:



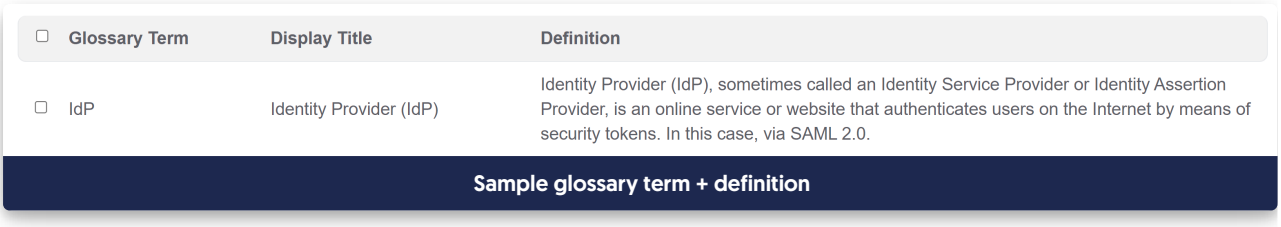
The glossary highlighting feature is a great way to improve consistency in your documentation while minimizing redundant work and keeping your docs looking clean.

Glossary formatting

Last Modified on 05/29/2024 5:28 pm EDT

To use the glossary, you'll need to create glossary **terms** and give each term a **definition**. You can also include an optional **display title**.

The term is the word that you expect someone to see in your documentation; the definition is the definition you'd like displayed for that term. If you're using the built-in glossary page or are showing glossary terms in search results, the display title is used in those places instead of the term, which allows you to include an acronym alongside the term, etc.



Glossary Term	Display Title	Definition
IdP	Identity Provider (IdP)	Identity Provider (IdP), sometimes called an Identity Service Provider or Identity Assertion Provider, is an online service or website that authenticates users on the Internet by means of security tokens. In this case, via SAML 2.0.

Sample glossary term + definition

Terms

Glossary terms may contain:

- Alpha-numeric characters
- Spaces ( )
- Dashes (- and --)
- Underscores (_)
- Apostrophes (')

Other characters (like parentheses and quotation marks) will be removed.

Display titles

Use display titles to display a different title for the term on:

- The built-in glossary page
- Glossary term search results, if used

These titles are automatically formatted in bold. They can include parentheses and quotation marks, which are prohibited in the terms.

When a display title is used, that title's spelling will be used for the glossary page alphabetical listing.

Display titles are used for the glossary page display *only* and have no impact on automatic highlighting.

Definitions

You can style text in glossary definitions using HTML:

- **Bold** `<b>`
- **Italics** `<i>`
- **Underline** `<u>`
- **Hyperlinks** `<a>`
- **Superscript** `<sup>`
- **Subscript** `<sub>`
- **Paragraph breaks** `<br>`
- **Strong** `<strong>`
- **Emphasis** `<em>`

Use plain HTML format to add these.



If you're not familiar with HTML, you can also format the text you want in an article editor, switch to the Code View or Source, copy the HTML from there, and paste it into your glossary definition.

You can add links to articles or other pages in glossary definitions using plain html:

```
This is the definition. For more information, see <a href="https://support.knowledgeowl.com/help/amazing-article">th
is amazing article</a>.
```

Glossary definitions cannot contain images. They often don't format well in the pop-overs and can lead to broken HTML, so we don't allow them. We recommend inserting a link to the image in the definition, instead.

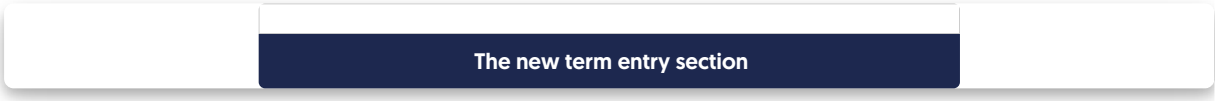
Add a new glossary term

Last Modified on 12/05/2024 1:45 pm EST

You can add glossary terms and definitions individually or in bulk.

To add a single glossary term:

1. In the left navigation, go to **Glossary**. The Glossary page opens.
2. Select the **+ Add Term** button. An area expands just below the button where you can add the details for your glossary term:



3. Enter the word that you want to appear in the glossary as the **Term**. If you're using automatic highlighting, this term should be what you want the highlighting to match on.
4. Enter the **definition** you'd like displayed with that term. The definition can contain basic HTML, including hyperlinks and text formatting. Refer to Glossary formatting for more information.
5. *Optional:* If you want to display a longer or alternate version of the automatic highlighting term in your glossary, enter it as a **Display Title**. This won't impact the automatic highlighting, but does allow you to include an acronym after the without impacting highlighting. For example, if we have a term for SSO, we might set a display title of "Single Sign-On (SSO)" to explain the acronym. Refer to When should I use display titles? if you're unsure whether you need or want a display title.
6. Once you've added your term and definition, select the **Add Term** button.



7. Your term will now appear in the glossary. If you have automatic highlighting turned on, the term will also be highlighted.

Import glossary terms

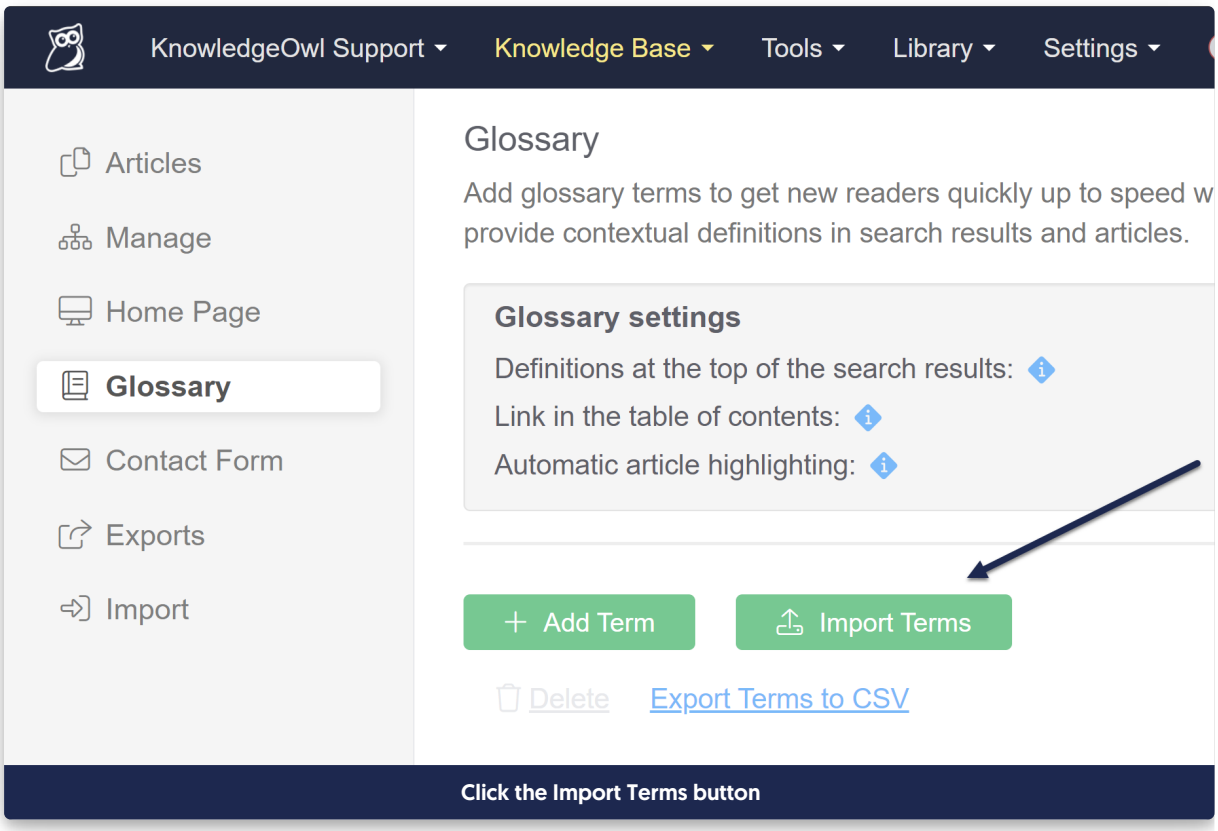
Last Modified on 05/29/2024 5:28 pm EDT

If you already have a list of terms you'd like to add to your glossary, you can choose to import those terms in bulk, saving you time from having to create them each individually. To do so, you'll need the terms in a CSV file that includes columns for:

- The glossary **term**: the word or phrase you want to define
- An **alternate title** (in the interface, this is called the **display title**): If you want to display a phrase with an acronym or other prohibited punctuation, you'll need to use a display title. While you don't have to use a display title, the import won't succeed without having an alternate title column present.
- The term's **definition**

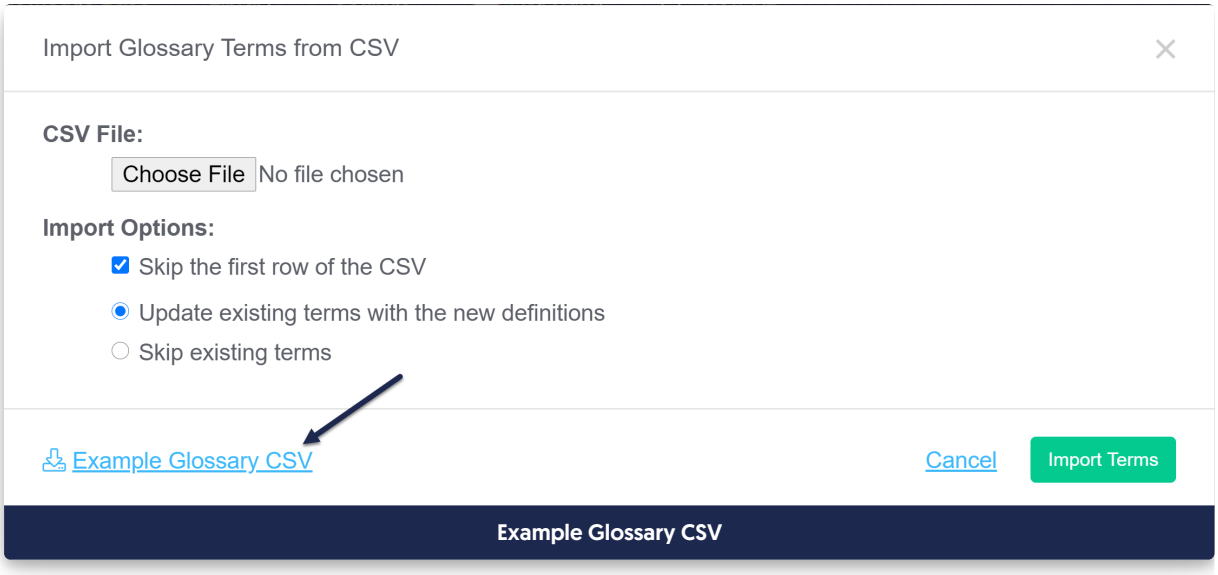
To add multiple glossary terms at once:

1. Go to **Knowledge Base > Glossary**.
2. Click the **^ Import Terms** button.

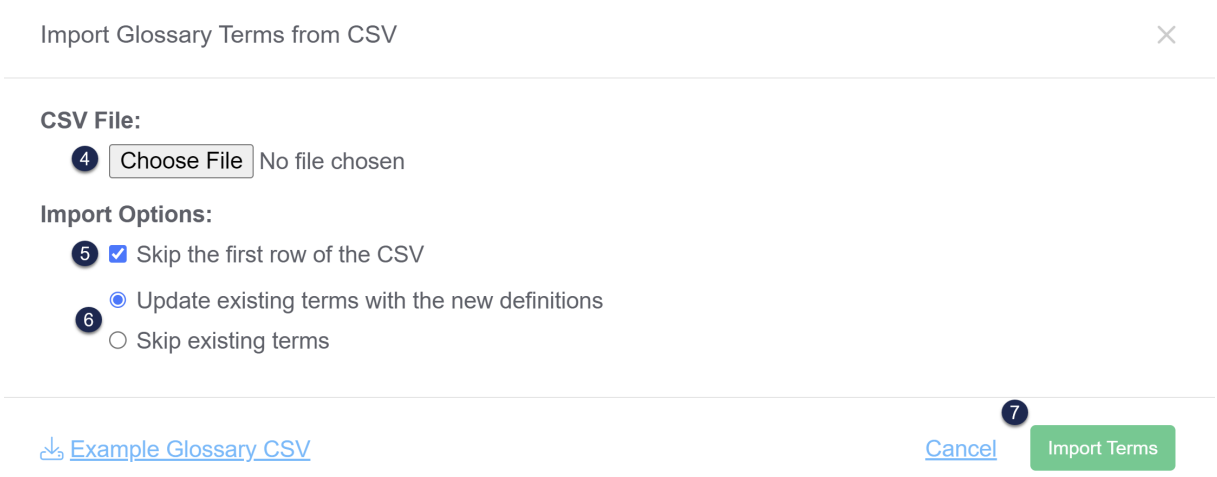


Click the Import Terms button

3. Click the **Example Glossary CSV** link in the lower left to download a sample CSV file you can use as a template.



4. **Use the template as a model; replace the terms, display titles, and definitions there with your own. Once your CSV has all your glossary terms in it, you can repeat the steps above and click Choose File to add your file.**

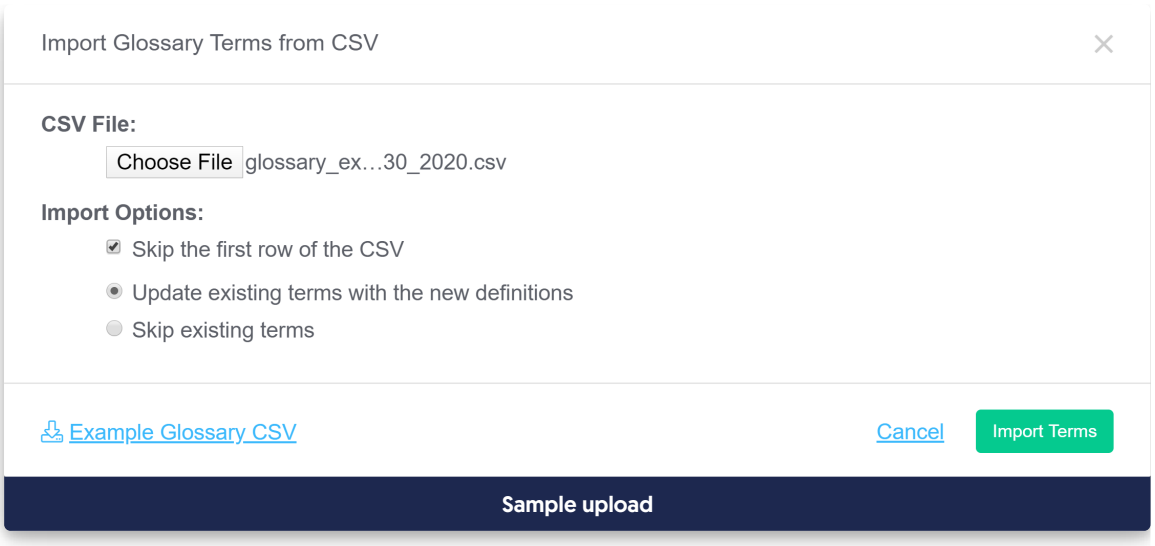


5. **If your CSV contains a header row, like our sample CSV file, check the box next to Skip the first row of the CSV. If your CSV file has no header row, leave this box unchecked.**



Be sure that the first two rows of your CSV are not empty. (If they are, the importer won't "see" any data and won't import anything!)

6. **If this is your first time adding terms, you can choose either the Update or Skip option. If you already have glossary terms, you'll need to tell the importer what you want it to do if your CSV contains terms that match terms you already have:**
   a. **Update existing terms with the new definitions** will overwrite the existing definition with the term's definition in your CSV file
   b. **Skip existing terms** will keep the existing definition you have for the term
   c. **Here's a sample upload with my file added, skipping the first row and updating existing terms:**



7. Once you've made your selections, click the **Import Terms** button.
8. If for some reason we are unable to import your glossary terms due to an invalid character, a message will be displayed with the rows that threw the error. See Troubleshooting glossary term imports if you run into this issue.
9. If we're able to import the CSV file, you'll see a progress bar while the import processes. Depending on the size of your glossary, this may appear for a split second or up to a minute.
10. Once the progress bar disappears and redirects you back to the Glossary page, your terms have been imported.

Glossary terms will automatically be displayed in alphabetical order, with terms beginning with numbers appearing first. When your glossary gets larger, you can use the search feature to quickly find a term.

Add glossary terms to your search results

Last Modified on 05/29/2024 5:27 pm EDT

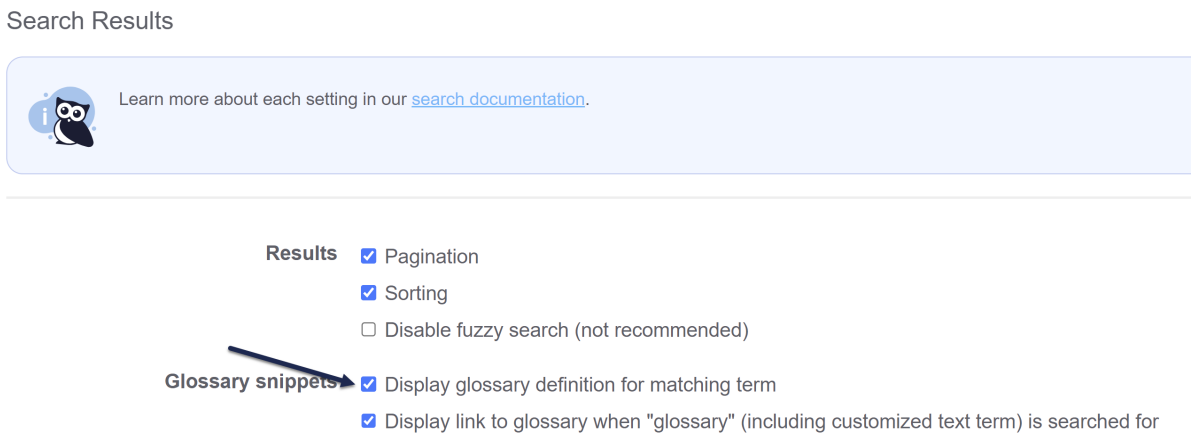
You can choose to display glossary terms and their definitions at the top of relevant search results.

If you're using Glossary, you can choose to display glossary terms that match the search phrase at the top of search results. Here's how it works:

- If your reader searches a phrase that exactly matches a glossary term, the term and its definition will be displayed in a box at the top of the search results.
- The glossary search result also includes a link to the specific letter in the Glossary that this term falls under.
- You can add custom CSS to style this box however you'd like.

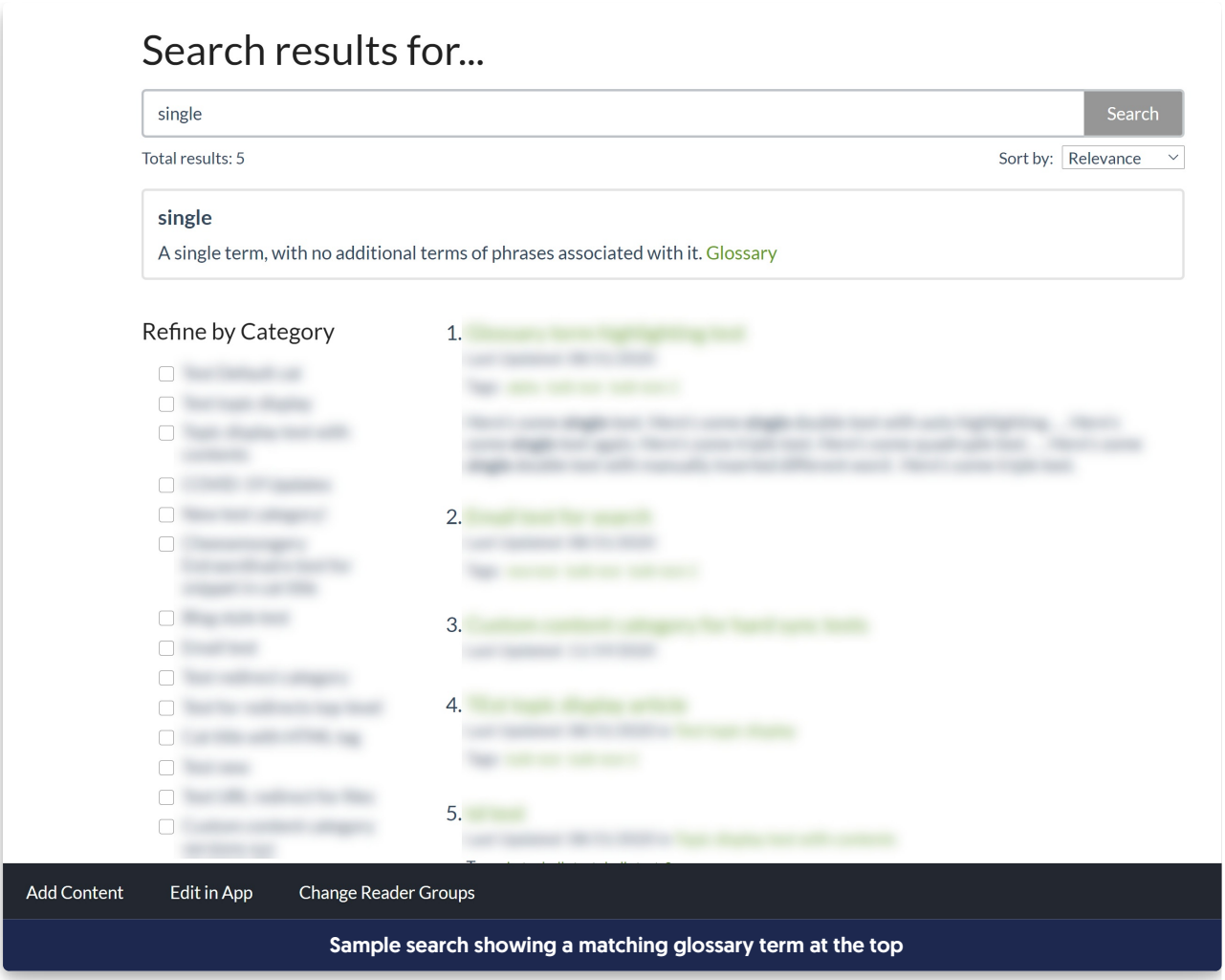
To enable the setting:

1. Go to **Settings > Search**. (Or, from the **Glossary** page, click the **Edit in settings** link next to "Definitions at the top of the search results.")
2. In the **Glossary snippets** section, check the box next to "Display glossary definition for matching term."

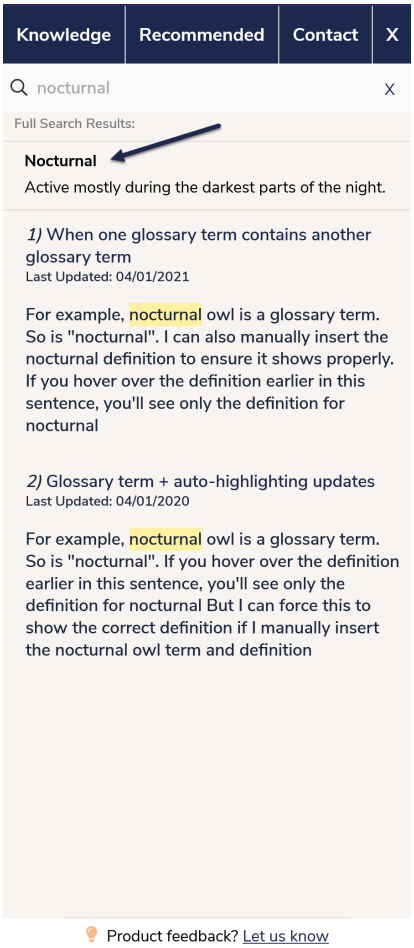


3. **Save** your changes.

You can now run a search for a glossary term and see it appear at the top of search results:



If you're using Contextual Help Widget (2.0), these search results will also be displayed in widget searches:



With glossary snippets enabled, see Style the glossary snippet search results to give these results the look and feel you want! Don't like the word "Glossary"? Use the Search section of the Customize Text tool to change the text that appears there!

Add the glossary page to your search results

Last Modified on 05/29/2024 5:27 pm EDT

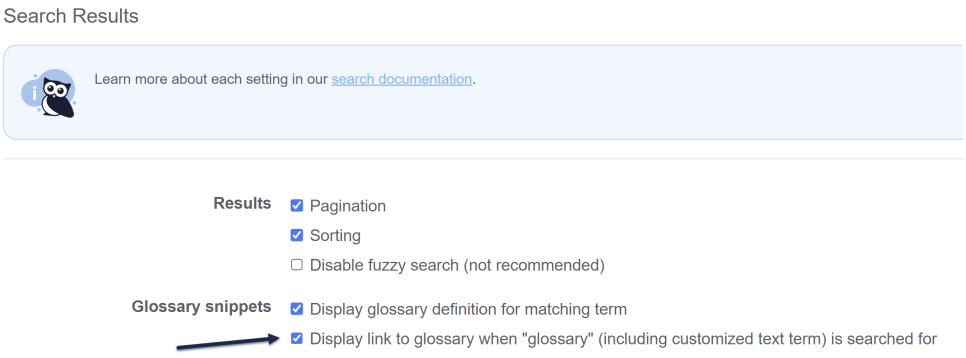
By default, your glossary page doesn't show up in search results. This means that if a reader types "glossary" in search, they won't get any results, or at least won't get the glossary page as a result.

But you can set it so that someone searching for "glossary" will get the glossary page as a result.

> Unlike the Glossary snippets functionality, this result will NOT display in Widget 2.0 search results.

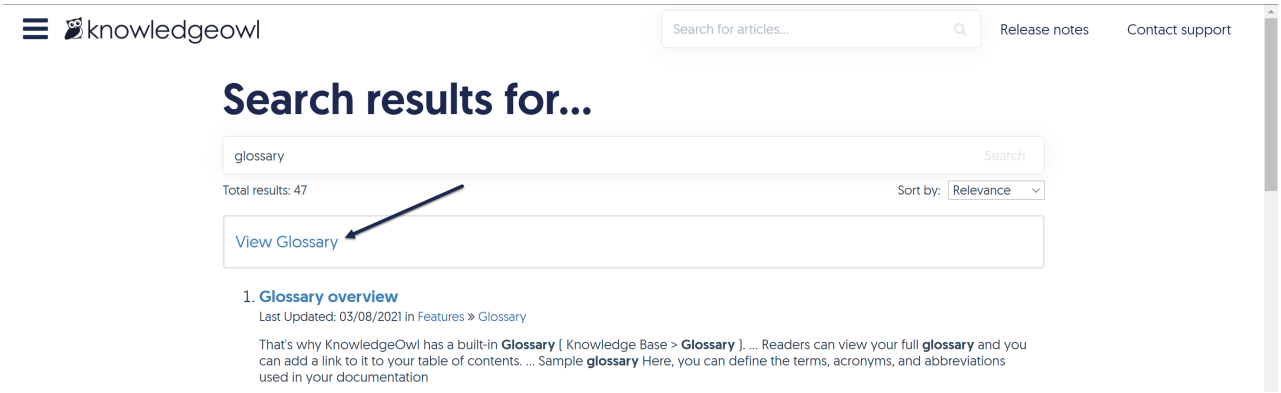
To enable this option:

1. Go to **Settings > Search**. (Or, from the **Glossary** page, click the **Edit in settings** link next to "Definitions at the top of the search results.")
2. In the **Glossary snippets** section, check the box next to **Display link to glossary when "glossary" is searched for**.



3. **Save** your settings.

Now, when a reader searches for "glossary", they'll see an option to **View Glossary** at the top of the search results:



You can change the look and feel of that section using the Style the glossary snippet search results options, too!

Don't like the wording for "View Glossary"? Never fear--use the Search section of the Customize Text tool to change it. ☺

Have you used the Customize Text tool to change the word "Glossary" to something else on the Glossary page itself? Never fear! This setting will apply to both the word "glossary" and whatever custom text string you've used!

Add glossary link to table of contents

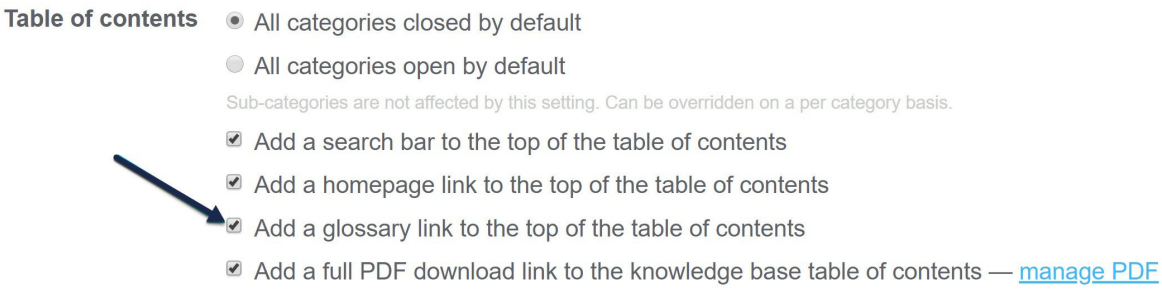
Last Modified on 05/29/2024 5:28 pm EDT

If you're using the Glossary, you can add a link to the glossary to your table of contents.



To add a glossary link to the top of your table of contents:

1. Go to **Settings > Basic.** (Or, from the **Glossary** page, click the **Edit in settings** link next to "Link in the table of contents.")
2. In the **Table of contents** section, check the box next to "Add a glossary link to the top of the table of contents".



3. **Save.** You should now see the glossary at the top of your TOC.

See Website Settings for more information on other settings available in **Settings > Basic.**

When should I use display titles?

Last Modified on 05/29/2024 5:28 pm EDT

All glossary term highlighting is driven by the glossary term itself. This term cannot contain parentheses, quotation marks, and other special characters.

This works well for highlighting, but it's not uncommon to want to display a more complete version of the term in the Glossary page itself or in the glossary term search results.

For example: in our glossary, we have a glossary term for IdP. This is the term that we use everywhere in our documentation, so we keep that as the term itself so our highlighting works properly.

But for our glossary page itself, we like to display the full title alongside the acronym. This is what the display title is for: it's basically the version of the term you'd like to appear on the glossary page.

If no display title is specified, then the term itself is used. If a display title is present, that's what's used.

So here's what the term's setup looks like in **Knowledge Base > Glossary**:

Glossary Term	Display Title	Definition
IdP	Identity Provider (IdP)	Identity Provider (IdP), sometimes called an Identity Service Provider or Identity Assertion Provider, is an online service or website that authenticates users on the Internet by means of security tokens. In this case, via SAML 2.0.

And here's how it displays in our glossary:

I

Identity Provider (IdP)

Identity Provider (IdP), sometimes called an Identity Service Provider or Identity Assertion Provider, is an online service or website that authenticates users on the Internet by means of security tokens. In this case, via SAML 2.0.

Note that the display title is what's used on the glossary page, but IdP is still used in the autohighlighting of glossary terms.

Display titles can be great for:

- Displaying the full term with an acronym in parentheses (e.g. term = We Love Owls and display title = **We Love Owls (WLO)**)
- Displaying a term with a list of additional terms (e.g. term = Identity Provider and display title = **Identity Provider (a.k.a. Identity Service Provider; Identity Assertion Provider)**)
- If you use the glossary to provide contact details on departments or individuals, this could be the full department name or the person's name + title (e.g. term = HR Dept and display title = Human Resources Department)

View the glossary

Last Modified on 07/10/2024 4:30 pm EDT

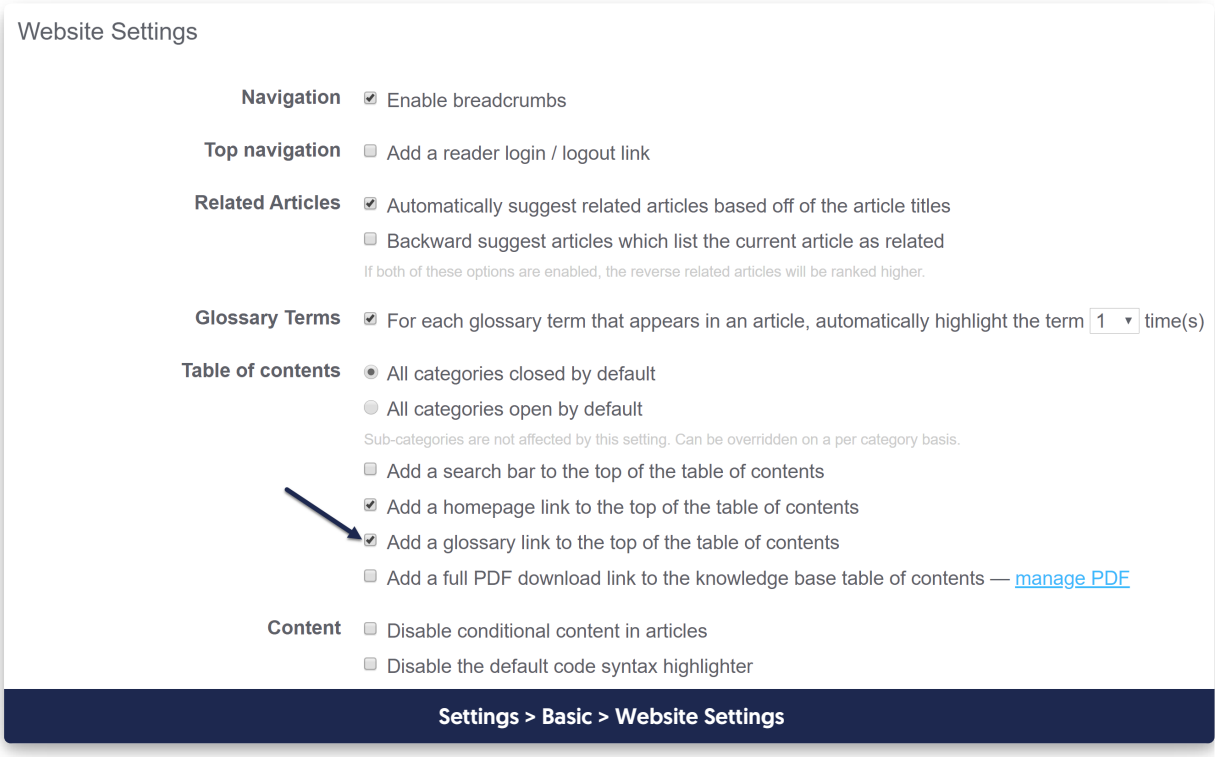
The glossary is a default page in every knowledge base. Its permalink is always "glossary", so you can get to the glossary by going to "/help/glossary" in your knowledge base (or "/home/glossary" or "/docs/glossary" if you are using a different root path).

For example, here is the glossary page for our help and documentation (we haven't set ours up yet so you'll only see some test terms): https://support.knowledgeowl.com/help/glossary

The Glossary page displays all alphabet letters at the top. When that letter has one or more glossary terms available, the letter is hyperlinked, and clicking on it will direct you to that letter's section in the Glossary.

If you are ready to share your glossary with your readers, you can add it to the table of contents:

1. Go to **Settings > Basic**.
2. Look for the **Website Settings**.
3. In the **Table of contents** section, check the box next to "Add a glossary link to the top of the table of contents".



4. **Save**.

You can also manually link to it from your top navigation, homepage, or articles using the link "/help/glossary".

Rename the glossary

Last Modified on 05/29/2024 5:28 pm EDT

If you'd like to rename the Glossary to something else (like Dictionary), there are a few places in the Customize Text tool you should update:

- **Miscellaneous:** Update the *Glossary page title* text string. See Section breakdown: Miscellaneous for more information.
    - If Settings > Search has the option to Display link to glossary when "glossary" (including customized text term) is searched for enabled, the custom text string you enter here will also return the glossary page when it's searched for. For example, if we use Dictionary, someone will be able to search for "dictionary" and the glossary page will return in search results. See the Search settings below on how to update the text there!
- **Table of Contents:** If **Settings > Basic** has the option to Add a glossary link to the top of the table of contents enabled, update the *Table of contents glossary link* text string. See Section breakdown: Table of Contents for more information.
- **Search:**
    - If **Settings > Search** has the option to Add the glossary page to your search results enabled, update the *Glossary snippet link to Glossary text* string
    - If **Settings > Search** has the option to Display glossary definition for matching term enabled, update the *Glossary snippet search result link to Glossary* text string
    - See Section breakdown: Search for more information



You cannot currently customize the /glossary URL.

Automatically highlight definitions in articles

Last Modified on 05/29/2024 5:27 pm EDT

Once you have set up glossary terms, you can automatically provide hover-over definitions for these terms in your articles. To turn on this option:

1. Go to **Settings > Basic**. (Or, on the Glossary page, click the **Edit in settings** link next to "Automatic article highlighting" to jump there!)
2. Scroll to the **Website Settings** section.
3. In **Glossary Terms**, check the box next to "For each glossary term that appears in an article..."



Check the box next to Glossary Terms and use the numeric dropdown to set the number of highlights

4. Set the numeric dropdown at the end of that row to set the number of times you want each term to be automatically highlighted in each article. To prevent readers from being overwhelmed by tons of underlines, we limit you to 10 automatically highlighted terms per article. We will highlight terms starting from the top of the article and working down, so if you choose 3 here, we will highlight the first 3 appearances of each glossary term in the article.
5. **Save** your changes.

For automatic highlighting to work, the terms in the articles must exactly match the terms in the glossary. If your article contains variations of a term (such as abbrevations, plurals, etc.), you can manually create a link to the glossary definition.



Auto-highlighting will not work on glossary terms within tables, divs (including the Well, Alert Danger, Alert Info, Alert Success, and Alert Warning divs), and embedded topic articles. To highlight terms within tables, divs, or topic articles, Add glossary definitions in articles manually.

See Website Settings for more information on other settings available in **Settings > Basic**.

Add glossary definitions in articles manually

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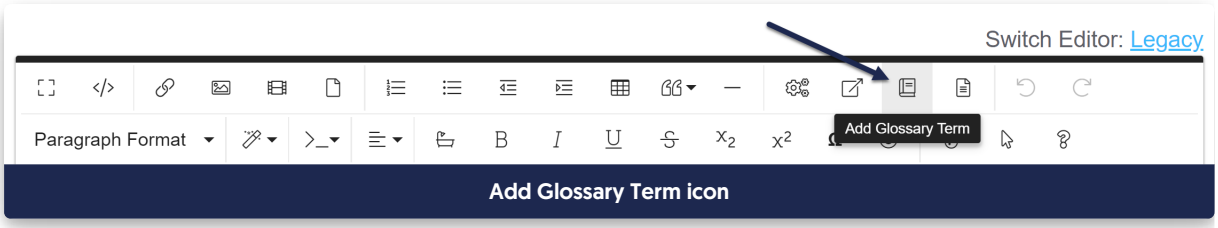
In addition to automatically highlighting up to 10 glossary terms per article, you can also manually insert glossary definitions. Manually inserting definitions has several advantages:

- Since you are specifying when and where you want to define terms, it gives you the most control.
- Automatic highlighting requires an exact match; manually inserting definitions allows you to include definitions for variations of words, acronyms, and so on.
- It can help guarantee that a multi-word term is properly highlighted even when it includes another glossary term.
- You can see in the article editor which definition terms will be highlighted (with automatic highlighting, you have to preview or view the published article).
- Manually inserting definitions is the only way to highlight glossary terms within tables, embedded topic articles, and divs, including the Well, Alert Danger, Alert Info, Alert Success, and Alert Warning divs.

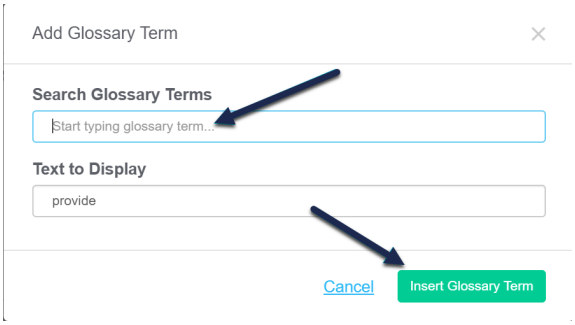
To manually insert a definition for a term in an article:

1. Make sure the glossary term and definition exist in the glossary.
2. In the article editor, highlight the word or phrase you want to provide a definition for.
3. Click on the Add Glossary Term icon in the editor.



Add Glossary Term icon

4. This will open a pop-up where you can search for and select the glossary term.
5. **Text to Display** will display the text you had highlighted to begin this process. You can edit it here if you'd like to change it.
6. Once you've selected the term you want, click the **Insert Glossary Term** button to finish inserting the definition into your article.



7. Be sure to **save** your article with these changes.

Once you insert the glossary term, you will see a double underline in the editor. The hover-over definitions can be viewed in preview or using the article live.

When one glossary term contains another glossary term

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Sometimes, you might have a glossary term that is contained in a longer glossary term. For example, I might have glossary terms defined for **check** and **price check**.

If you use these terms in the same article, the automatic highlighting won't always behave consistently. In some cases, it will highlight the shorter term (check) and won't highlight the longer term (price check). In other cases, it will highlight the longer term (price check) and won't highlight the shorter term (check). It depends a bit on the order the terms appear in, how you've configured your automatic highlighting (how many times it will autohighlight the same term), punctuation, and other formatting.

If you run into this situation, we recommend manually adding the glossary terms using the steps in Add glossary definitions in articles manually.

For example, nocturnal owl is a glossary term. So is "nocturnal". If you hover over the definition earlier in this sentence, you'll see only the definition for nocturnal is showing--not for the full multi-word term.

But I can force this to show the correct definition if I manually insert the nocturnal owl term and definition to ensure it highlights properly (which I've done in this sentence). I can also manually insert the nocturnal definition to ensure it shows properly.

This manual highlighting of multi-word glossary terms should only be necessary when you have other glossary terms that contain a portion of that term, or when you want to include highlighting for a term that doesn't match exactly, such as nocturnal owls.

Change the style of glossary terms, the glossary page, or glossary search results

Last Modified on 05/29/2024 5:27 pm EDT

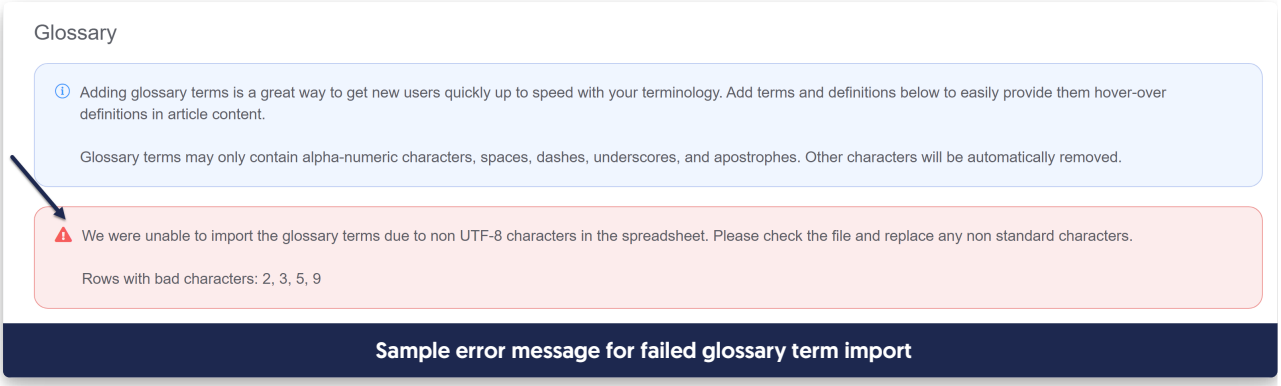
See Glossary look and feel for a more detailed look at all the ways you can change the style of glossary terms, the glossary page itself, or glossary search results!

Troubleshooting glossary term imports

Last Modified on 05/29/2024 5:28 pm EDT

Sometimes, your CSV file might contain characters that our Glossary doesn't support. If this happens, after you click the button to import terms, you'll see an error message displayed near the top of the page, noting that we were unable to import the glossary terms due to non UTF-8 characters in the spreadsheet. We'll provide a list of the rows from the CSV that contained these characters.

Here's what the error message looks like:



Sample error message for failed glossary term import

Resolving this message can get a little tricky. If you open the CSV in Excel or another spreadsheet program, they will often hide or display nothing for non UTF-8 characters.

So here's what we recommend for trying to resolve your errors:

1. Find wherever you have the CSV File stored on your computer.
2. Right-click and select **Open With**.
3. Choose a text editor, such as Notepad, Notepad++, Visual Studio Code, or any other basic text editor you have installed on your computer to open the CSV.
4. Find the rows in the CSV that correspond to the rows in the warning message displayed in KnowledgeOwl.
5. Text editors generally either display the characters outright OR they'll display an icon when they're unable to display a character (such as). Look for an icon like that, an unusual character, or any kind of weird code/characters.
6. Once you find what you think is the offending character(s), delete them from the CSV in the text editor.
7. Once you've edited all of the rows that threw errors, **Save** your CSV file.
8. You can now try re-importing this same CSV file. Hopefully those changes did the trick!

If you're continuing to get glossary import errors and you can't figure out why, please contact us and include a copy of the CSV file. Our support owls should be able to help get things sorted out.

Glossary FAQs

Last Modified on 05/29/2024 5:28 pm EDT

Do glossary terms show up in search?

They can, yes! The Glossary snippets option to "Display glossary definition for matching term" in **Settings > Search** will display a glossary term that exactly matches the search phrase. See Glossary snippets for more details.

Does the Glossary page show up in search?

Not by default, but you can set it so that searching the word "glossary" will direct readers to your glossary. See Add the glossary page to your search results for more details.

Can you add synonyms for glossary terms?

You can add synonyms as part of a definition or add synonyms as separate terms with text like "See xyz". We recommend defining the most commonly used term and listing synonyms in the definition. You can always manually provide definitions for the synonyms in articles using the Add Glossary Term option.

Example:

```
This is a definition. Synonyms: this, that, the other thing
```

We do have a feature request to add a synonyms feature. Contact us if you are interested in this feature and we can add you to the list!

Can you link from one glossary term to another?

Not currently. You can alternatively use text like "See also: this, that, this other thing" or link to an article. Contact us if you are interested in this feature and we can add you to the list!

Can you have more than one glossary?

No. Each knowledge base has a single glossary that is used for the glossary page as well as for automatic highlighting. If you have a need for multiple glossaries, you might consider having separate knowledge bases for the content that requires different glossaries.

Can you share a glossary between multiple knowledge bases?

We don't currently have a way to share a single glossary across multiple knowledge base. However, you can create a glossary in one, export the terms, and import them into other kb. You will need to manage the glossary for each knowledge base independently.

Can you insert the full definition into an article as plain text rather than a popover?

Not currently but we do have a feature request to create a merge code or snippet for glossary terms. Contact us if you are interested in this feature and we can add you to the list!

Can you prevent a term from being highlighted in a particular article?

If you want to prevent a glossary term from appearing highlighted in a particular place, go to the Code View and put a span tag around part of the word. For example, if you have a glossary term for an acronym like ARE but you want to prevent highlighting on something like: "These are the instructions":

```
These a<span>re</span> the instructions
```

This will prevent the glossary term highlighting.

Broken Links Report overview

Last Modified on 05/29/2024 5:27 pm EDT

The Broken Links Report is located in the **Tools** menu. You can use this report to clean up your broken links and rerun it to be sure they are fixed.

Our default **Editor** and **Writer** roles have permission to generate the Broken Links Report. If you're using a custom author role, that role must have the Tools Permission to **Run Broken Links Report**.

This report will scan all articles with Published (or Needs Review) publishing statuses in your knowledge base to check for broken hyperlinks and produce a Broken Links Report CSV file of all detected broken links. It includes most hyperlinks across your knowledge base, though there are some links it won't check.

You can refine the report to include additional content, such as:

- "Draft" articles
- "Archived" articles
- Article Versions (this will include all non-active versions in the checks, including historical versions)



The report can only check links that are publicly available. If you have hyperlinks to resources behind a company firewall, VPN, or other login, those links will show up in the report even though you might have no trouble accessing them. You may want to ignore 401 or 403 codes if you're seeing a lot of these.

By default, the report will ignore links that trigger a 301 or 302 code, since these codes indicate a redirection and a successful ultimate load. Not familiar with HTTP status codes? See Exclude codes for a quick primer!

Once the report has been generated, it remains available in **Tools > Broken Link Checker** until you generate a new one, so you can also start this report, go do other things, and then come back and download it later.

The checker will only allow one report per knowledge base to be generated at a time, so if you have multiple authors and one person starts it, everyone else will be prevented from running a new report until that report has finished generating.

See the links below for more information on generating a report, how to read it, and tips and tricks for handling odd situations!

Generating a Broken Links Report

Last Modified on 05/29/2024 5:28 pm EDT

Our default **Editor** and **Writer** roles have permission to generate the Broken Links Report. If you're using a custom author role, that role must have the Tools Permission to **Run Broken Links Report**.

To generate a Broken Links Report:

1. Go to **Tools > Broken Link Checker**.
2. If you'd like to include draft or archived article statuses or article versions, check the appropriate boxes in the Additional content options section.
3. If you'd like to ignore specific status codes (or include 301 and 302 response codes), check the appropriate boxes in the Exclude codes section.
4. Once you've finished making selections, select **Generate Report**.
5. The checker will display a detailed progress bar as it's running, letting you know as it checks content.
6. Once the checker has completed, it will display a success message and a **Download** button will appear next to the **Generate Report** button. The timestamp for the "Last report ran on..." statement will also update.
7. Select **Download** to download the Broken Links Report in CSV format.

You can then peruse the report and update content as you see fit. See How to read the Broken Links Report for more information.

Once the report has been generated, it remains available in **Tools > Broken Link Checker** until you generate a new one, so you can also start this report, go do other things, and then come back and download it later.

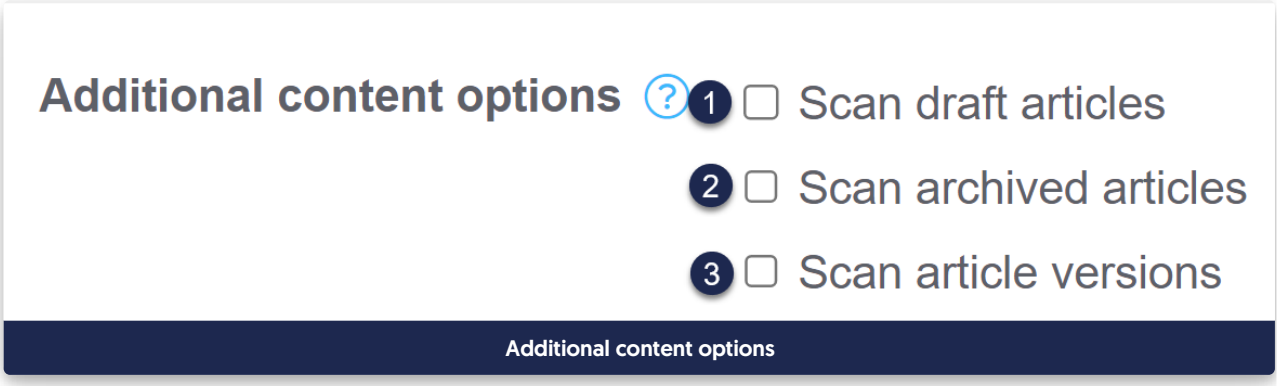
The checker will only allow one report per knowledge base to be generated at a time, so if you have multiple authors and one person starts it, everyone else will be prevented from running a new report until that report has finished generating.

Additional content options

Last Modified on 05/29/2024 5:27 pm EDT

By default, the Broken Links Report will check all articles with either a Published or Needs Review status.

Use the checkboxes in the **Additional content options** section to include additional content:



Additional content options

1. **Scan draft articles:** Include articles with any of the three draft statuses (Draft, Ready to Publish, Rejected Draft) in the report
2. **Scan archived articles:** Include articles with the Archived status in the report
3. **Scan article versions:** Include non-active versions of articles with the designated statuses in the report
    - This will include historical versions

Exclude codes

Last Modified on 05/29/2024 5:28 pm EDT

The Broken Link Checker will check for HTTP status codes at the 3xx, 4xx, and 5xx level.

You have the option to ignore certain codes:



Exclude codes checkboxes

Not sure which codes you need to worry about? We recommend using the default settings in this section to ignore 301 and 302 response codes and include all the rest.

1. **Ignore 301 response codes:** 301 status code means a resource has a permanent redirect in place.
    - 301 codes are generally safe to ignore, since they indicate a redirect but ultimately a successful resource load.
    - The box to ignore 301 codes is checked by default when you open this page.
    - See the 3xx section below for more detail.
2. **Ignore 302 response codes:** Like 301, a 302 status code means a resource has a redirect in place, though it's a temporary one.
    - 302 status codes are generally safe to ignore, since they indicate a redirect but ultimately a successful resource load.
    - The box to ignore 302 codes is checked by default when you open this page.
    - If you've used Old Links, you may see 302 redirects appear if you have hyperlinks to the old link. While you don't have to resolve these, it doesn't hurt to tidy them up. :)
    - See the 3xx section below for more detail.

3. **Ignore 401 response codes**: 401 status code means "Unauthorized". It's specifically used when a link or resource requires authentication and authentication has either failed or hasn't been provided.
    - We recommend including 401 response codes the first time you run a report. We often end up ignoring 403 codes in subsequent runs.
    - If you're referencing protected resources that you have access to but KnowledgeOwl doesn't (such as on a company intranet or behind a VPN), those resources might throw a 401 error code.
    - As long as you've confirmed that you and your readers can access these resources, you may choose to ignore this code when you rerun the report.
    - See the 4xx section below for more detail.
4. **Ignore 403 response codes**: 403 status code means "Forbidden." It's used when a resource requires authentication but the authentication provided does not grant the user access (such as lacking appropriate permissions).
    - We recommend including 403 response codes the first time you run a report. We often end up ignoring 403 codes in subsequent runs.
    - If you're referencing protected resources that you have access to but KnowledgeOwl doesn't (such as on a company intranet or behind a VPN), those resources might throw a 403 error code.
    - As long as you've confirmed that you and your readers can access these resources, you may choose to ignore this code when you rerun the report.
    - See the 4xx section below for more detail.
5. **Ignore 500 response codes**: 500 status code means "Internal Server Error". It's a catch-all error when a resource can't be accessed but there isn't a more specific reason.
    - We recommend including 500 codes the first time you run the report and only ignoring them if they feel noisy.



If you're seeing a particular code show up that you'd like to ignore, contact us and let us know which code it is. We started with some we ran into while testing but imagine there may be other "noisy" codes people would like to remove!

More detail on HTTP status codes

If you're not very familiar with HTTP status codes, here's a general breakdown on what they cover:

- **3xx: redirection**: These links are not generally broken but must hop through at least one redirection to be opened.
    - By default, we choose to ignore 301 and 302 codes since those are functioning, but you can opt to include them.
    - We include these codes in the report in case you are referencing external resources that have moved and you'd like to identify them and grab the new URL to bypass that redirect step. If your own resources throw one of these errors, you can generally ignore them.
- **4xx: client errors**: These are links that are definitely broken, and you generally want to resolve them.

    - The only error codes you might want to ignore here are 401 and 403 codes, since they don't necessarily require resolution.
    - Both of these codes are generally triggered when a server recognizes a request as valid but the server won't return the resource. These are usually due to authentication issues. This can be caused by the resource being hidden behind a firewall or login that our systems can't access. If you or your readers can successfully access the resource, then you don't need to resolve these error codes, but you may want to ignore these codes when you run the report in the future.
- **5xx: server errors**: These are links that are also definitely broken. These are generally all errors you'd want to resolve.
    - 5xx errors include some old favorites like: 500 Internal Server Error (a generic error to let you know something went wrong); 502 Bad Gateway; 503 Service Unavailable; 504 Gateway Timeout. These errors generally indicate that a given resource can't be found or the overall server itself has issues.

For more information on HTTP status codes, you can check out the formal HTTP spec or the more readable Wikipedia list of HTTP status codes.

Which codes should I worry about?

Last Modified on 05/29/2024 5:28 pm EDT

Broken Links Reports are a lot like SEO audits--you get a large list of things you could fix, but the reality is that a lot of them are mostly functioning and you have to make some decisions about what you'll prioritize fixing. Some sites will *always* throw a particular code (particularly the 300-level codes), and working with your report means figuring out what those are so you can ignore that noise. Here's some general guidance:

In general, 400- and 500-level codes signify broken links (while most 300-levels are redirects that load successfully). But that's not always true.

While you might want to spot-check a few of them, ignoring 401 or 403 codes is likely a safe choice. Most of the 403 errors we investigated seemed to be perfectly functioning pages, and we now use the ignore checkboxes for these codes when we run our own reports.

You may also learn that certain errors seem tied to certain sites and aren't "real" broken links. We've noticed in our own testing that certain domains throw some errors on all URLs, even valid ones. In most cases, this is because the domains or sites block the kinds of automated requests we make to check the status code.

For example: We reference Zapier documentation a lot. Basically every link to Zapier documentation throws a 405 error (405: Method Not Allowed). If we view the pages in our browser, they load fine. But if we make the cURL request that our broken link checker uses (curl -I https://url-to-check.com), the 405 error is again returned. Zapier doesn't support this method of checking URLs.

We now generally ignore 405 codes on Zapier hyperlinks since we know this is an issue.

You'll likely develop your own set of quirks like this as you work with your own report. If there's a status code you'd like us to add to the checkbox options of codes to ignore, contact us and let us know which code and some examples of sites that are throwing it. These reports can be noisy and we're happy to add some more filters to make them a bit quieter as you need!

How to read the Broken Links Report

Last Modified on 07/17/2024 12:15 pm EDT

The Broken Links Report includes eight columns:

- **Object ID**: ID of the object, relevant for individual objects like articles, snippets, and categories. Left blank for KB-wide things like Theme or Homepage.
- **Object Type**: One of 6 options:
  - Article
  - Article Version (only included if article versions are included as content)
  - Category
  - Homepage
  - Snippet
  - Theme
- **App Edit Link**: Editor link to the page that contains the broken link, so you can open it to resolve the issue.
  - For theme sections, this is just the URL to **Settings > Style**.
- **View Link**: Link to the live KB page that contains the broken link, so you can view it and try to open the link to see what happens. Some objects (such as snippets, theme, etc.) do not have a live View Link.
- **Object Field**: Indicates which "field" on the object contains the link. This list varies based on the object; for Theme, this field includes which portion of the Custom HTML is triggering it.
  - Most options are detailed in What content is checked.
- **Link URL**: the URL that's considered broken
- **Link Text**: for URLs included in body or HTML content, the link text is shown. This can help you identify where in the body you need to update the link.
  - Shows N/A for areas where you just assign the URL directly (such as URL redirects, icons, banners, thumbnails).
- **Link Type**: Contains either "Internal" or "External"
  - **Internal** for links that refer to resources within KnowledgeOwl (files, other articles, etc.)
  - **External** for links that refer to websites and resources outside of KnowledgeOwl
- **Status Code**: the code that we're returning that's prompting this link to be included in the report. See Exclude codes for a description of some common status codes.
- **Author**: For objects that have an author (such as articles or some category types), this will display the name of the current designated author.
  - **N/A** is displayed if this information is not tracked (such as for theme)
  - A blank is shown if the author has been deleted since they saved a change.
- **Last Modified Author**: For objects where we track the date and author when modifications are made, this displays the name of the author who last saved changes to the object.
  - **N/A** is displayed if this information is not tracked (such as for theme)
  - A blank is shown if the author has been deleted since they saved a change.

You can work through this report in any number of ways. We've found it useful to open the CSV in Excel or a similar program, filter by the **Object Type** column, and then work through each Object Type in more detail. See Tips & tricks for broken links for more suggestions on working through the report.

What content is checked

Last Modified on 07/17/2024 12:16 pm EDT

Here are all the objects and fields the Broken Link Checker will examine as it creates the Broken Links Report:

- **Article**
  - **Article Content:** all text entered in the editor of the article.
  - **Redirect URL:** If an article has the URL Redirect box checked, we will check that URL.
  - **Thumbnail URL** and **Banner URL:** If an article has a designated thumbnail and banner, we will check those URLs.
- **Category**
  - **Category description:** We'll check the category description field.
  - **Redirect URL:** If a category is set up as a URL Redirect category type, we will check that URL.
  - **Icon URL:** If a category has a designated icon, we'll check that URL.
  - **Thumbnail URL** and **Banner URL:** Topic Display categories and Custom Content categories can also have thumbnails and banners. If these categories have those fields, we'll also check those URLs.
  - **Category Content:** If it's a Custom Content category, we will check all text entered in the editor, just like an article.
- **Snippet**
  - **Snippet Content:** all text entered in the editor of the snippet.
- **Homepage**
  - **Homepage Content:** all text entered in the **Homepage** editor.
- **Theme**
  - **Custom HTML:** all HTML entered into any of the Custom HTML templates in **Settings > Style**.
  - The report will identify which Custom HTML template is the issue in the Object Field column (404 Error, Article, Body, Homepage, Login, Manage Reader Subscriptions, Restricted Access Page, Right Column, or Top Navigation)
- **Article Versions (if versions are included):**
  - **Version Content:** all text entered in the editor of the article version.



For all **Content** checks, the report WILL NOT check img, video, and iframe sources (src), just straight hyperlinks. So if you've used the editor options to Insert Image or Insert Video, those URLs will not be checked. See What is not checked for more information.

What is not checked

Last Modified on 05/29/2024 5:28 pm EDT

The Broken Link Checker has three known limitations:

1. **Displayed images, videos, and iframes:** For all Content checks, the report will not check the source value; it only checks explicit hyperlinks. So if you've used the editor options to Insert Image or Insert Video, or you've inserted your own iframe, those src URLs will not be checked. If you'd like to see image, video, or iframe sources included in these reports, please contact us and let us know!

2. **Anchors:** The Broken Links Checker will not check the validity of anchor or other hash portions of a hyperlink. Issues with anchors don't surface as independent HTTP status codes, so we had no way to check these.
    - The Checker will ignore same-page anchors altogether.
    - For external page URLs that include an anchor, it will check the base URL of the page only.

3. **Private content:** If you are linking to resources that require a login of some kind to view (such as within your company intranet, or behind a VPN, or documentation elsewhere that is behind a login page), those links will generally show up in the report with some 400-level status code. While we can validate resources that are stored within KnowledgeOwl, we have no way to pass authorization to check private resources stored elsewhere.

4. **mailto: links:** Since these links aren't a true URL, they cannot be verified through the automated process we use. The report ignores these links.

5. **javascript links:** Since these links usually perform an action rather than hitting a URL, they cannot be verified through the automated process we use. The report ignores these links.

6. **tel: links:** As with the mailto links, these links cannot be verified through the automated process we use. The report ignores these links.

Tips & tricks for broken links

Last Modified on 05/29/2024 5:28 pm EDT

The Broken Links Report can generate a lot of links the first time you run it, and some links won't seem broken. Here are some tips and tricks we've learned while working with these reports.

Use the link text

The Broken Links Report includes the Link Text for all hyperlinks. If you're looking at a broken link that has "Article Content" in the Object Field, the Link Text is your best way to find that link in your article. (We usually use either the Editor Link or Live Link and then use browser search to find the text.)

Article content link has no link text

Some broken links have "Article Content" in the Object Field, but no Link Text, like this:

	A	B	C	D	E	F	G	H	I
1	Object ID	Object Type	Editor Link	Live Link	Object Field	Link URL	Link Text	Status Code	
2	6050ec93	Article	https://ap	https://wc	Article Content	[[hg-id:5dbb55e4ed121c8d5c70eb09]]	Administra	404	
3	6050ec93	Article	https://ap	https://wc	Article Content	[[hg-id:5dbb55d1ed121c8d5c70eaf1]]	Administra	404	
4	633cb086	Article	https://ap	https://wc	Article Content	http://www.playhouse-preschool.com/index.html	http://ww	403	
5	633cb086	Article	https://ap	https://wc	Article Content	https://www.knowledgeowl.com/fake-page		404	
6	633cb086	Article	https://ap	https://wc	Article Content	https://www.knowledgeowl.com/fake-page		404	
7	633cb086	Article	https://ap	https://wc	Article Content	[[hg-id:633486118e80fe1f39134723]]	Apple	404	
8	633cb086	Article	https://ap	https://wc	Article Content	[[hg-id:633cb188e6ed19188f0ad35f]]	I am delet	404	
9	62bb344b	Article	https://ap	https://wc	Article Content	https://dyzz9obi78pm5.cloudfront.net/app/image,	2	400	
10	62bb344b	Article	https://ap	https://wc	Article Content	https://dyzz9obi78pm5.cloudfront.net/app/image,	2	400	

Row 5 has no Link Text

The problem with these links is that you have nothing to search for. In fact, since these links have no text, they're not displayed in the live article or in the article WYSIWYG editor.

This situation is usually caused by a specific workflow:

- At some point, the link was inserted
- When someone went to remove it, they did not use the **Unlink** option; they just deleted the text itself

With this set of interactions, the WYSIWYG editor does something unusual: it keeps the hyperlink in the code, but just deletes the text from it.

To find these hyperlinks:

1. Open the article in the editor using the Editor Link provided in the report.
2. In the upper left of the editor, toggle to **Code View** by selecting the </> button in Modern Editor or the **Source** button in Legacy Editor.



3. You should be able to use a browser search for the hyperlink from here, though for really long articles we'll sometimes copy that code view into a text editor and use that search functionality.

4. Generally, these hyperlinks should be deleted (they haven't been visible/used since that text was deleted), though this might also prompt you to revisit if there should be a link here and where it should point.

5. Be sure to **Save** your changes.

To avoid having these types of links show up in your report in the future, we recommend this workflow whenever you remove a hyperlink:

1. Find the text for the link and click on it to open the Hyperlink menu.

2. Select the **Unlink** option.



3. Once the hyperlink has been unlinked, you can delete the text as usual.

Article content link has

  is the HTML encoded version of a space, so this is another situation where the hyperlink won't display in the WYSIWYG editor or the live article. Follow the same instructions mentioned above for Article content link has no link text.

LinkedIn link has 999 code

999 is not a "real" error code, and you likely won't see these error codes for pages outside of LinkedIn.

They appear here because LinkedIn does not like automated URL checks, and has set up their pages to return a 999 code when these kinds of link checks are made, regardless of whether the URL is valid or invalid.

For these links, it's probably good to review them the first time you run the report to be sure they seem to work, but we generally filter them out after that since they're not informative at all.

If you're seeing these a lot and would like us to add a checkbox so you can ignore 999 codes, contact us and let us know!

Demio link has 502 code

Links to Demio resources will generally show up with a 502 error in the reports. We contacted Demio and discovered that they don't support the automated checks our broken link checker runs, so these links will always generate a 502. You can choose to skip these in the report or manually check them.

Codes you can probably ignore

In working with our own reports, we have found most pages with these status codes to load fine:

- 307 (a type of redirect, similar to the 301 code we ignore by default)
- 308 (a type of redirect, similar to the 302 code we ignore by default)
- 405

For now, we are including these codes in all reports. If you find that these--or any other error codes--consistently are things you want to ignore, contact us and let us know--we'd be happy to add some more ignore options!

External link has 404 code but loads fine for me

Most of us are trained that a 404 page is an error, so these are often the status codes we prioritize first when reviewing a report.

But there are cases where some external links throw a 404 code in the report but seem to load fine for you when you check them. What's going on?

This can happen for a few different reasons:

- Our Broken Link Checker will only wait 5 seconds when it's checking a URL. If it doesn't get a response within 5 seconds, it will log the URL as a 404 and move on. We do this to try to keep the reports from taking a long time to generate. So if the page loads for you--but it loads slowly--that can be the issue.
- Try testing the URL in an Incognito or Private window. Sometimes, you have accepted a security risk (such as an expired SSL certificate) or otherwise saved a cookie that makes a resource available. Incognito or Private browser windows don't allow cookies, so they should give you the cleanest slate to test with.
- External links are very much at the mercy of availability at the exact time the report was run. If the server the page or resource is hosted on had a small blip, it might trigger a 404 in our report but open just fine.
- Like LinkedIn, the provider who hosts that site might not like automated link checkers and may throw 404s on perfectly valid resources just because they can. We've noticed this with a lot of the Google documentation we link to, all of which loads perfectly fine to a human browser, for example.

Who can run the Broken Links Report?

Last Modified on 05/29/2024 5:28 pm EDT

Our default **Editor** and **Writer** roles have permission to generate the Broken Links Report. If you're using a custom author role, that role must have the Tools Permission to **Run Broken Links Report**.

Customize Text tool overview

Last Modified on 05/29/2024 5:28 pm EDT

Throughout your knowledge base, there are certain text strings that KnowledgeOwl generates. Previously, we had set these as static text fields and you needed to add custom scripts to override that text.

With the Customize Text tool, we're converting those text strings so that you can customize them directly yourself--no coding required!

We've marked this feature as in Beta because we're still building out all of the sections, but here's what we have so far:

- Search
- Table of Contents/Breadcrumbs
- Reader Login
- Top Navigation
- Article
- Miscellaneous
- Required Reading
- Article Lists
- Contact Form

Use the **Knowledge Base Section** selector at the top of the page to move between these sections.

For each section, we provide a list of the **Default Text Strings** and a more detailed **Description** of where/how that text string is used. If you've set your own customized text string, it is displayed in the **Your Text String** column.

> Authors with the standard **Editor** and **Writer** roles can use Customize Text; if you're using custom author roles, you'll need to have the **Tools** Permission to **Update Customize Text**.

Add or edit your own text string

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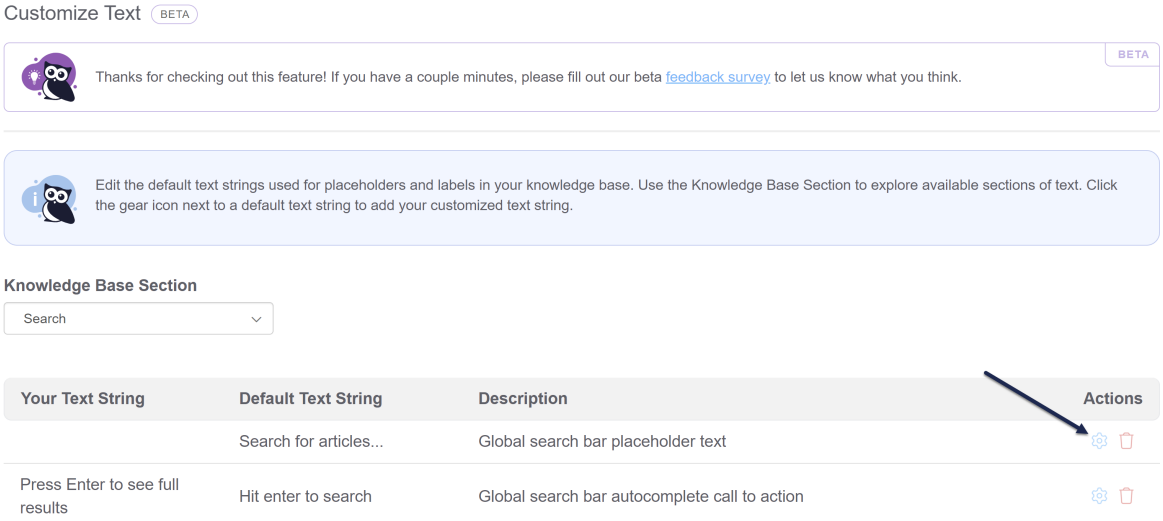
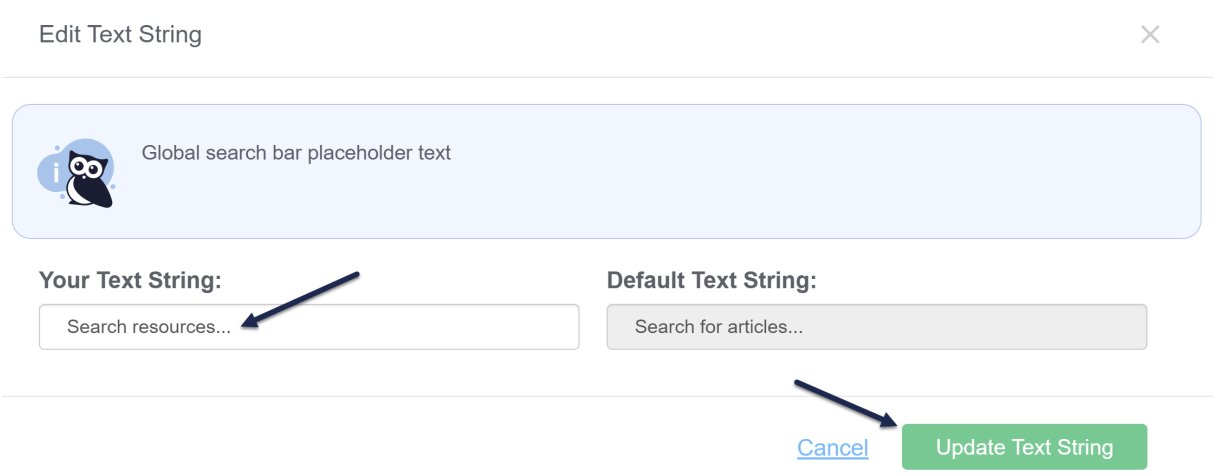
> Authors with the standard **Editor** and **Writer** roles can update Customize Text strings; if you're using custom author roles, you'll need to have the **Tools** Permission to **Update Customize Text**.

To add a new customized text string or edit an existing customized text string:

1. Review the available **Knowledge Base Sections** and select the section your text string belongs to. (This may require some trial and error!)
2. Find the string you'd like to update.
3. Click the gear cog icon to the right of it in the **Actions** column:



4. This will open the **Edit Text String** pop-up, where you can enter or edit the text string.
5. Once you've added the text you'd like used in **Your Text String**, click the **Update Text String** button to save your change.



These changes will immediately be live in your knowledge base, though if you were already viewing your knowledge base you may need to refresh to see them!

Some tips on adding text strings:

- **You cannot enter a blank/empty text string or a text string that is all spaces.**
- **In most places, you can insert an emoji and it will work properly!**
- **Raw HTML entered here will not render as HTML, but will instead display as an encoded text string.**

Reset a customized text string

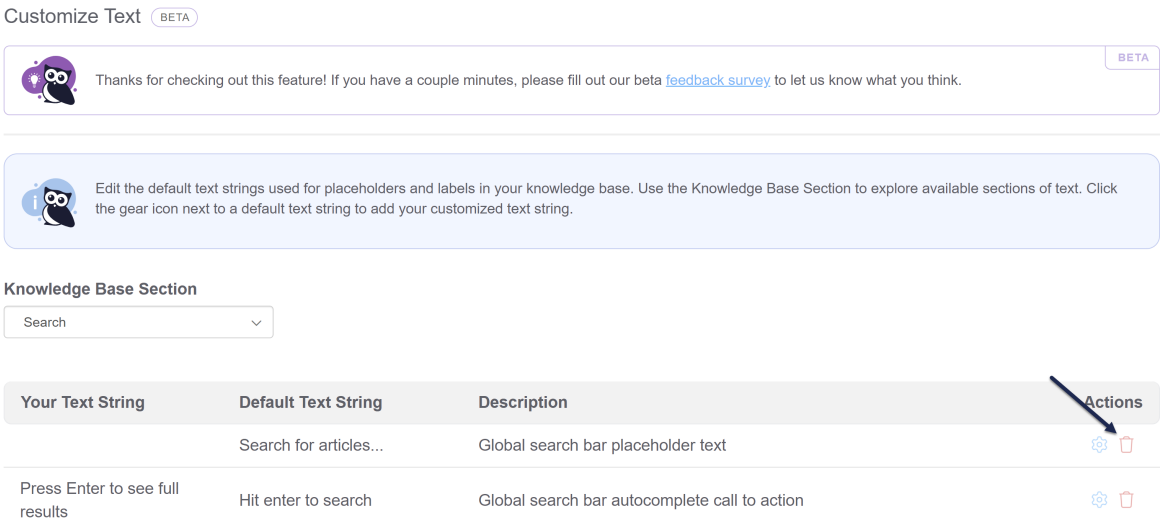
Last Modified on 05/29/2024 5:28 pm EDT

> Authors with the standard **Editor** and **Writer** roles can update Customize Text strings; if you're using custom author roles, you'll need to have the **Tools** Permission to **Update Customize Text**.

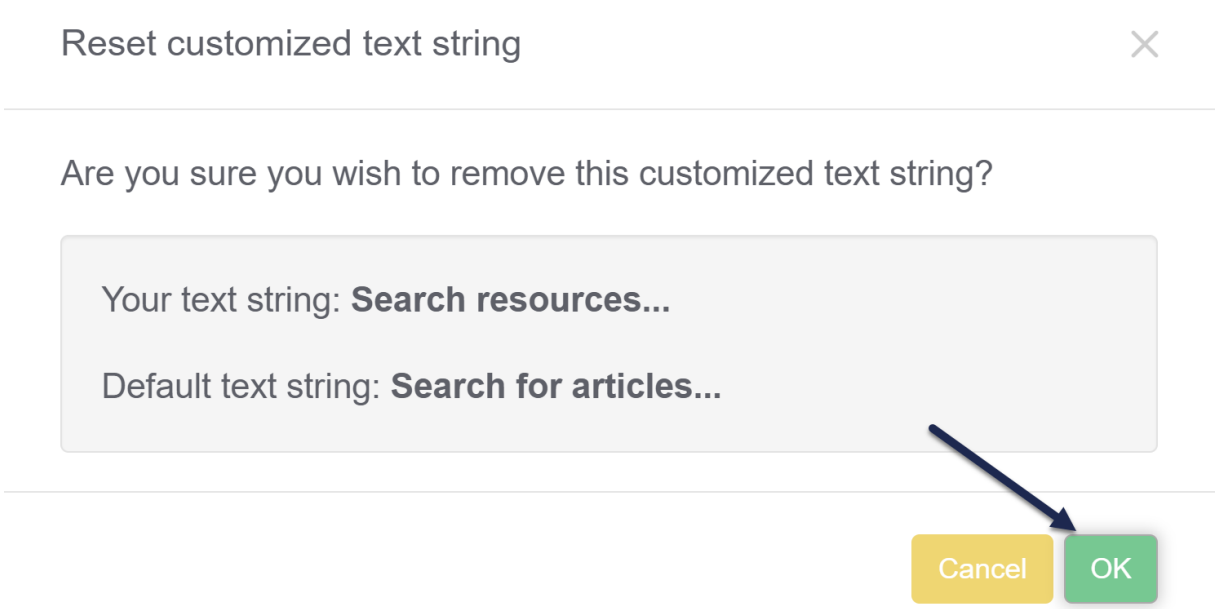
Resetting a customized text string will remove whatever text you have entered for the string and switch your knowledge base back to using the Default Text String.

To reset a customized text string:

1. **Go to Tools > Customized Text.**
2. **Find the customized text string you'd like to remove.**
3. **In the Actions column, click the trashcan icon to the right of that text string.**



4. **This will open a pop-up which will ask you to confirm that you really want to remove your customized text string.**
5. **Click OK to complete the text string reset.**



6. **Your text string will be removed and your knowledge base will immediately start using the Default Text String again.**

Section breakdown: Search

Last Modified on 12/05/2024 11:04 am EST

Here's a full list of the Default Text Strings available in the Search Knowledge Base Section, with accompanying screenshots to show how they're used:

Default Text String	Description	Additional notes/description	Screenshot References
Search for articles...	Global search bar placeholder text	This placeholder is used wherever the search bar appears, including on the homepage and top navigation.	Global Search screenshots, #1
Hit enter to search	Global search bar autocomplete call to action	When someone has started to type in a search, this text appears at the bottom of the typeahead search results. It appears everywhere the search bar is used.	Global Search screenshots, #3
Refine	Global search bar category filter button label	The button added to all search bars when the Filter search by categories option is enabled.	Global Search screenshots, #2
Search results...	Search results page header		Search Results Page screenshots, #4
Search	Search bar button label, search results page	When you're viewing the Search Results page, the search bar displayed there shows this text label instead of the magnifying glass button.	Search Results Page screenshots, #5
Search	Search input field title in search bar and search results page	This text is displayed when you hover over the search bar anywhere other than the homepage.	Global Search screenshots, #23
Total results:	Search results page total search results count label	This is the label for the total number of search results returned, which is displayed just below the search bar on the Search Results page.	Search Results Page screenshots, #6

Default Text String	Description	Additional notes/description	Screenshot References
Sort by:	Search results page sort control label	The label displayed to the left of the Sort by dropdown, just beneath the Search bar. Only displayed when Sorting is enabled in search.	Search Results Page screenshots, #7
Relevance	Search results page Relevance sort option	The default and first option in the **Sort by** dropdown, which sorts based entirely on relevancy and ranking algorithms. Only displayed when Sorting is enabled in search.	Search Results Page screenshots, #8
Popularity	Search results page Popularity sort option	The second option displayed in the **Sort by** dropdown, which sorts based on views. Only displayed when Sorting is enabled in search.	Search Results Page screenshots, #14
Last Updated	Search results page Last Updated sort option	The third option displayed in the **Sort by** dropdown, which sorts based on last modified date. Only displayed when Sorting is enabled in search.	Search Results Page screenshots, #16
Newest	Search results page Newest sort option	The final option displayed in the **Sort by** dropdown, which sorts based on create date. Only displayed when Sorting is enabled in search.	Search Results Page screenshots, #17
Glossary	Glossary snippet search result link to Glossary	The link to the Glossary that is displayed in a glossary snippet search result. Only displayed when Glossary snippets are enabled in search and a glossary term has been searched.	Search Results Page screenshots, #19

Default Text String	Description	Additional notes/description	Screenshot References
Glossary	Glossary snippet link to Glossary	The link to the Glossary that is displayed when the word "Glossary" is searched. Only displayed when Add the glossary page to your search results is enabled in search and the word "glossary" has been searched.	Search Results Page screenshots, #20
Refine by Category	Search results page category filter heading	The header displayed above the category filters on the Search Results Page. Only displayed when the Filter search by categories option is enabled.	Search Results Page screenshots, #9
Refresh results	Search results refresh results button	When the category filters have been changed on the Search Results Page, this text appears with the refresh action to update the search results to use the new filter selections. Only displayed when the Filter search by categories option is enabled.	Search Results Page screenshots, #10
No results found.	Search results page text shown when no search results match	Message displayed when no search results have been found.	Search Results Page screenshots, #21
Update in progress. Please wait a minute and try again.	Text displayed when search reindex is running	This message is only displayed when someone tries to search and a search reindex is running.	Search Results Page screenshots, #22
Search is temporarily unavailable. Please wait a moment and try again.	Text displayed when there is an error searching	This message is only displayed if an error occurs during the search, which is a pretty rare event. The display is similar to the Update in progress message.	

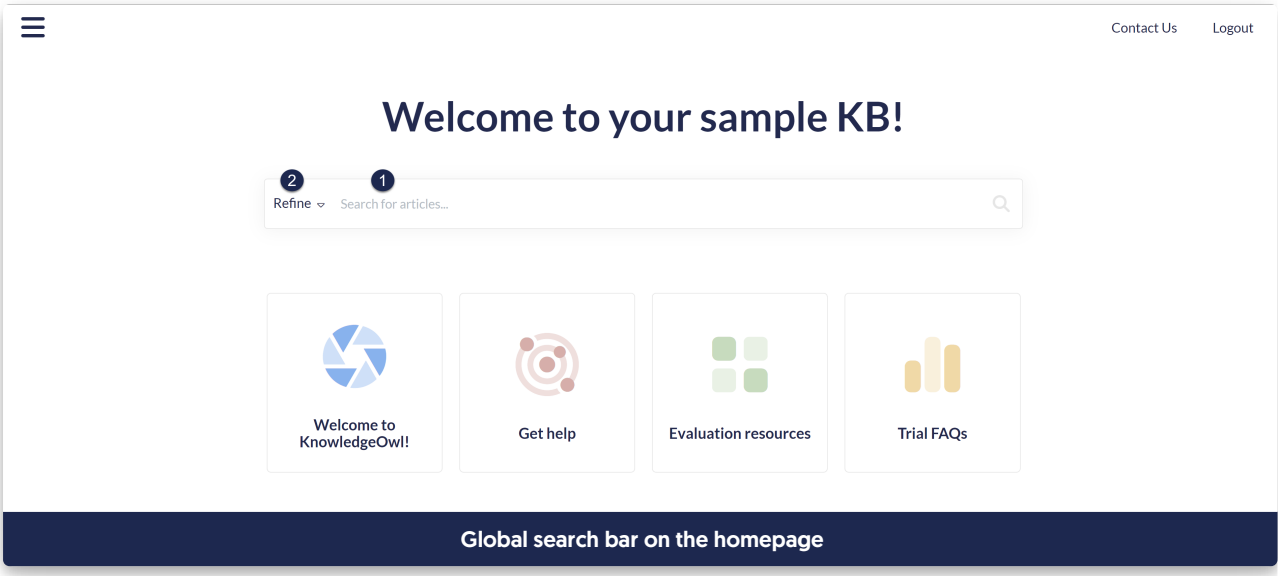
Default Text String	Description	Additional notes/description	Screenshot References
Total views:	Individual search result metadata label when Popularity sort used	When the Popularity sort order is selected, this label precedes the view count displayed for an individual search result. Only displayed when Sorting is enabled in search.	Search Results Page screenshots, #15
Created on:	Individual search result metadata label when Newest sort used	When the Newest sort order is selected, this label precedes the create date displayed for an individual search result. Only displayed when Sorting is enabled in search.	Search Results Page screenshots, #18
Last Updated:	Individual search result metadata label when default Relevance or Last Updated sort used	If sorting is not enabled, this label is shown at all times in individual search results. If Sorting is enabled in search, this labels is shown when the default Relevance sort or the Last Updated sort is selected.	Search Results Page screenshots, #11
Tags:	Individual search result label for tags list	If an article has tags, the tags are displayed in the individual search result. This label precedes the tag list. If you have added the article-tags merge code to your Article HTML, this will also update that label in articles and PDFs.	Search Results Page screenshots, #13
in	Individual search result text between tags and parent category link	In an individual search result, this preposition is displayed between the initial metadata line (which varies based on sort) and the category the article is stored within.	Search Results Page screenshots, #12

Global Search screenshots

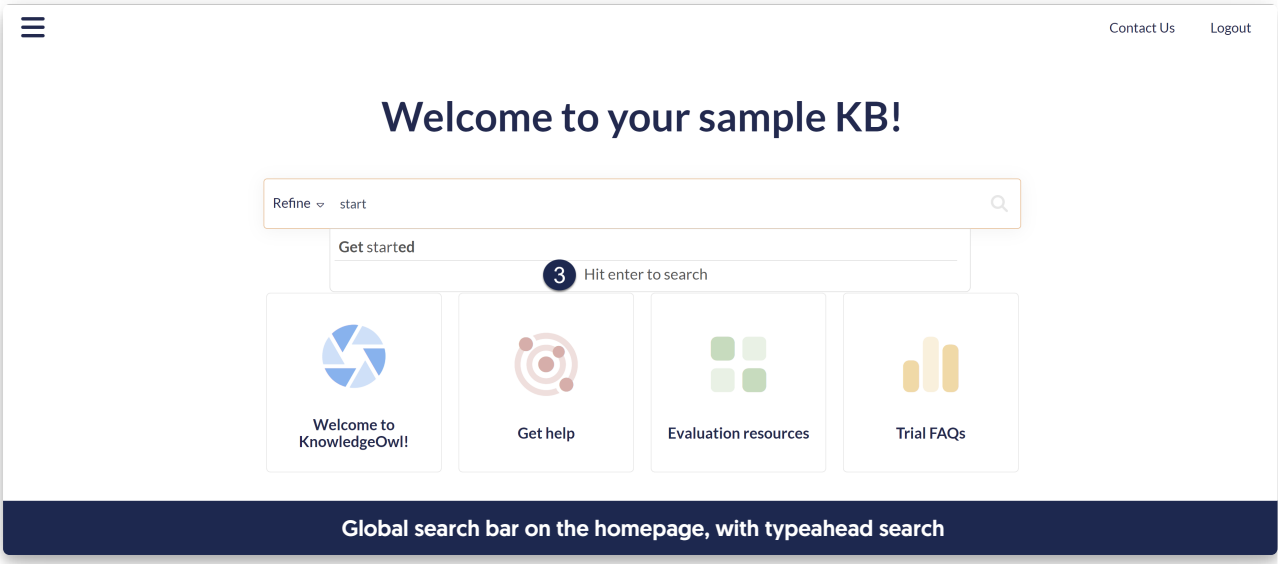
The global search bar can appear many places, including:

- **The homepage**
- **The top navigation**
- **The table of contents**
- **The right column**

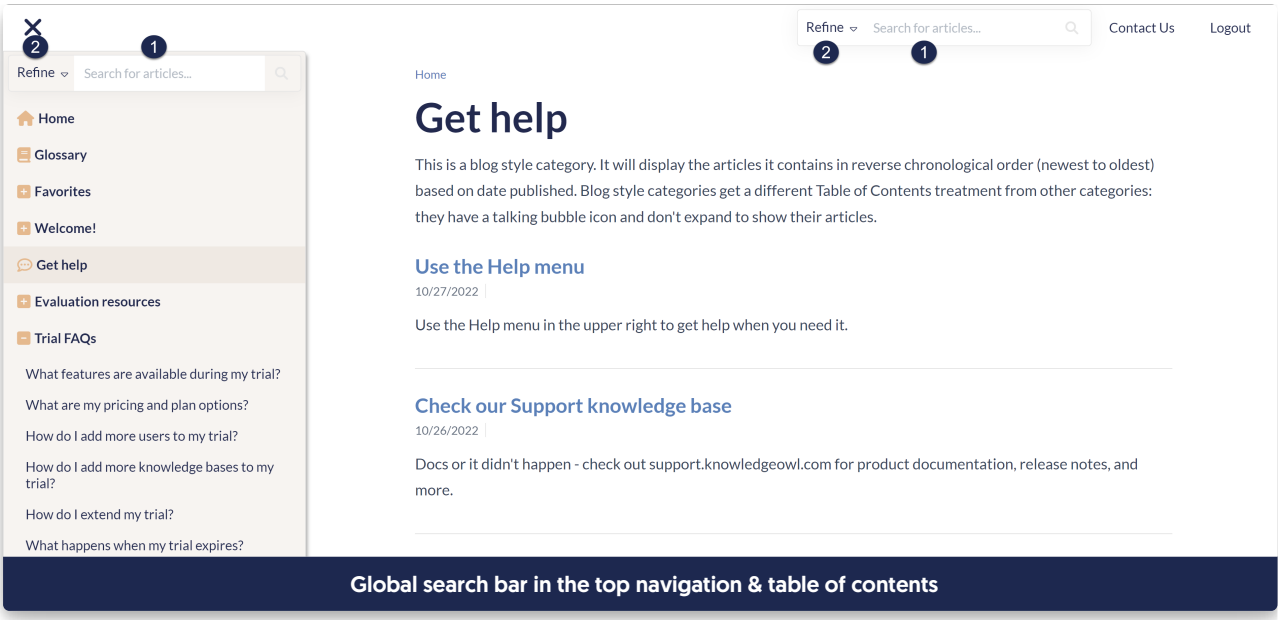
Here are a few examples of where it's used:



Global search bar on the homepage



Global search bar on the homepage, with typeahead search

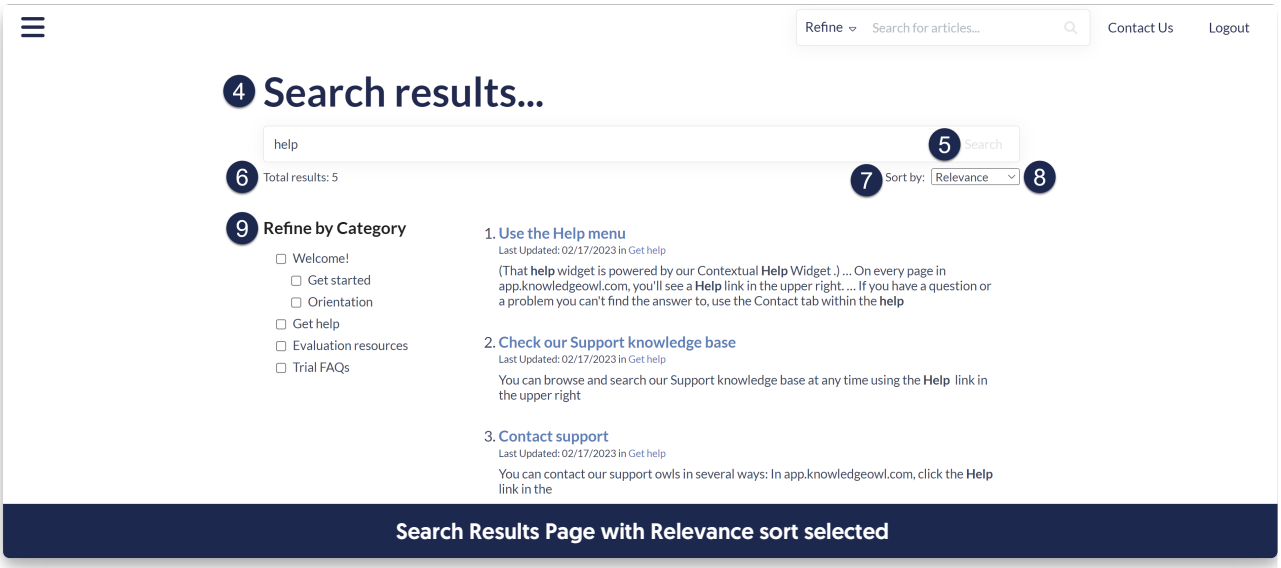




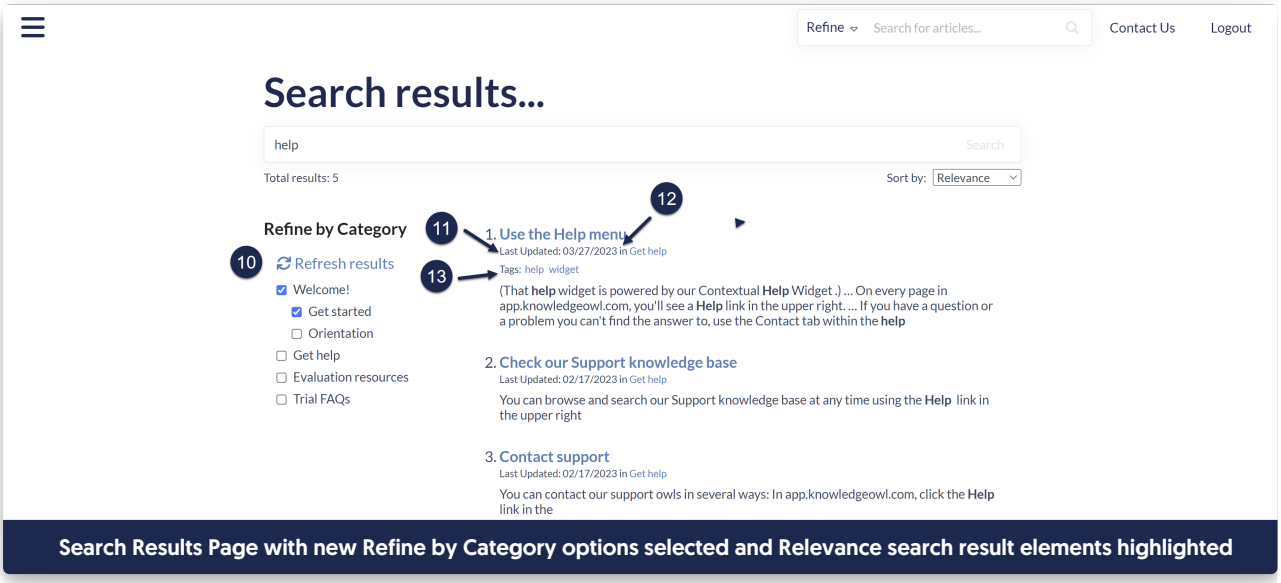


Search Results Page screenshots

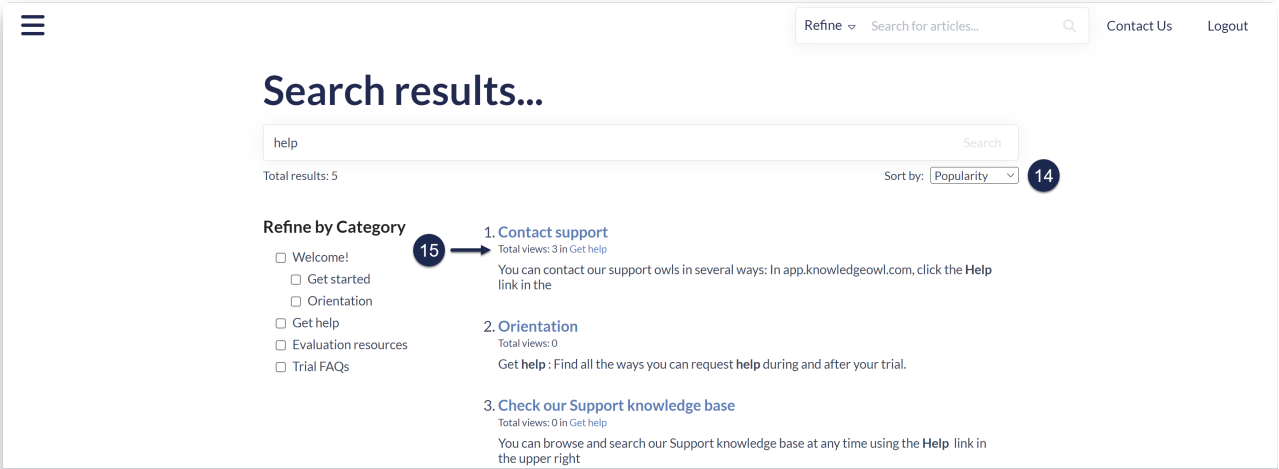
The Search Results Page will look a bit different depending on whether you the option to Filter search by categories enabled or not. These screenshots show the page with that option enabled, but if you aren't using it, the Refine by Category section and its elements won't be visible.



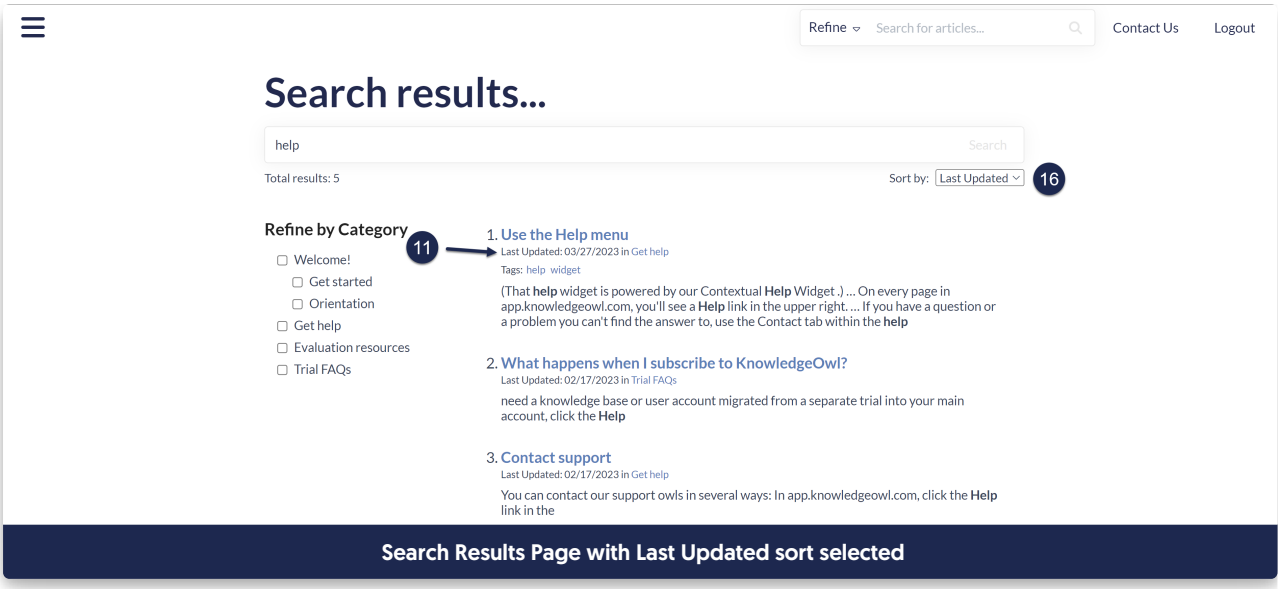
Search Results Page with Relevance sort selected



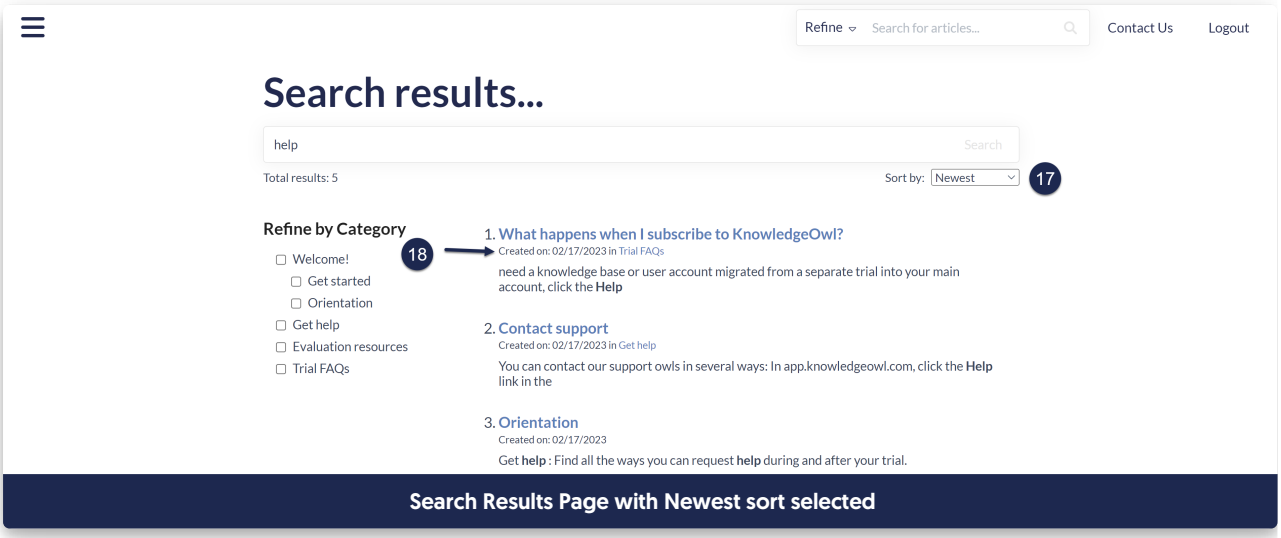
Search Results Page with new Refine by Category options selected and Relevance search result elements highlighted



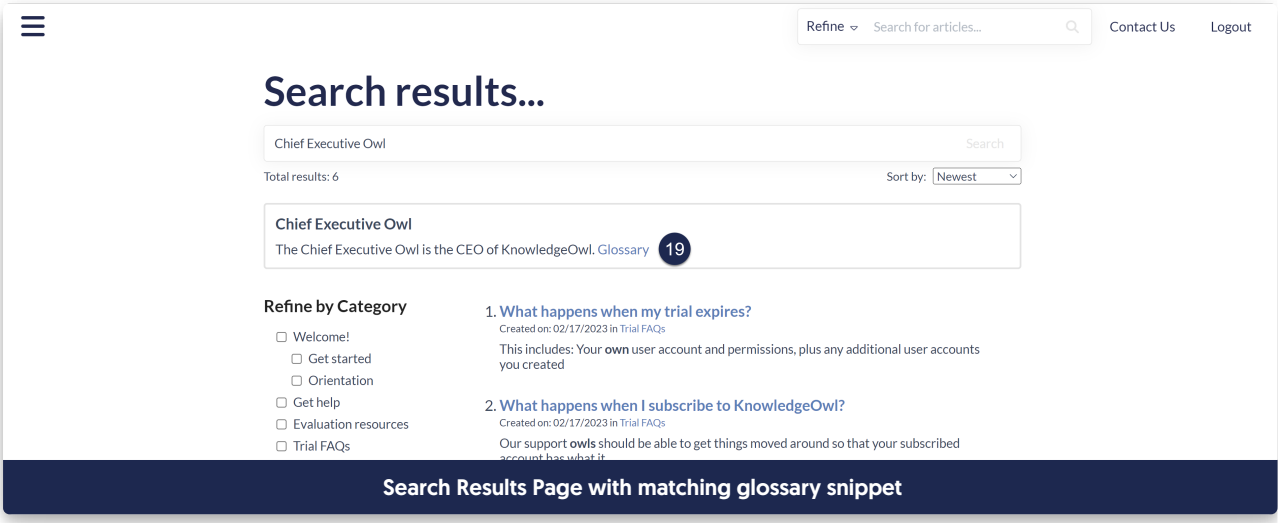
Search Results Page with Popularity sort selected



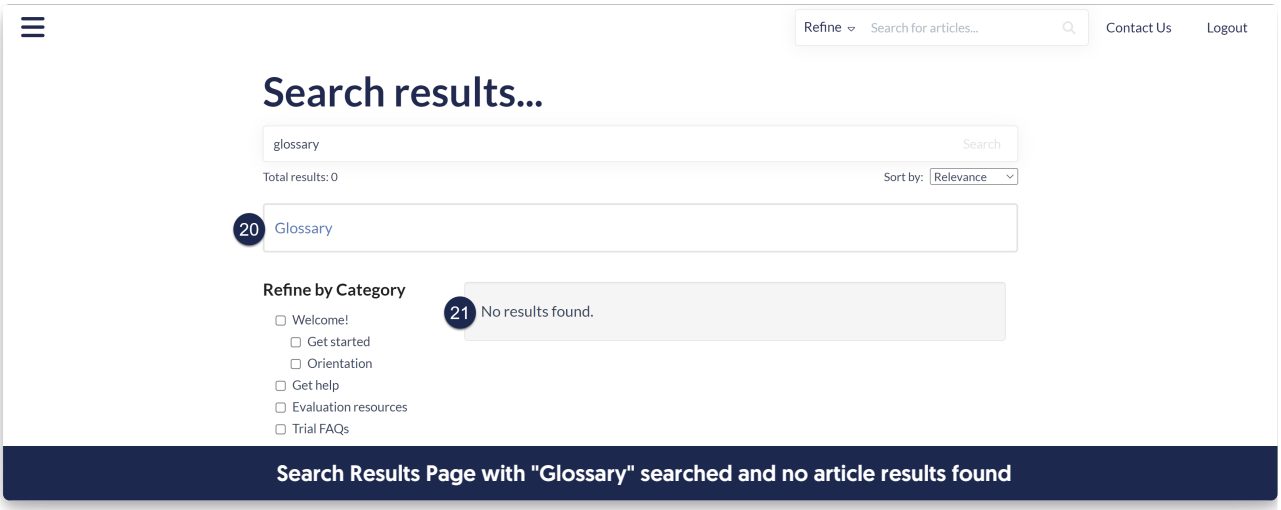
Search Results Page with Last Updated sort selected



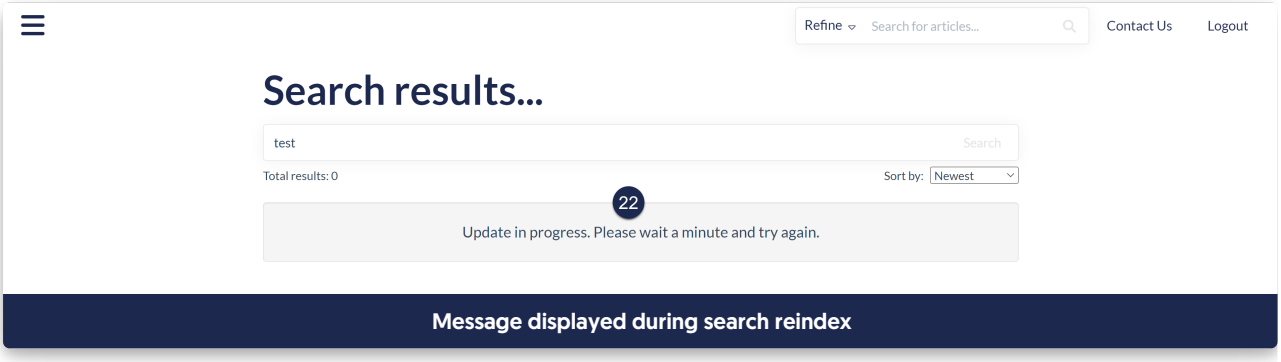
Search Results Page with Newest sort selected



Search Results Page with matching glossary snippet



Search Results Page with "Glossary" searched and no article results found



Message displayed during search reindex

Section breakdown: Table of Contents

Last Modified on 05/29/2024 5:28 pm EDT

Here's a full list of the Default Text Strings available in the Table of Contents Knowledge Base Section, with accompanying screenshots to show how they're used:

Default Text String	Description	Additional notes/description	Screenshot References
Home	Breadcrumb homepage link text	The "Home" link text displayed if Breadcrumbs are enabled in **Settings** > **Basic** > Website Settings	Breadcrumbs screenshot, #1
Home	Table of contents homepage link text	The "Home" link displayed in the table of contents, if Add a homepage link to the top of the table of contents is enabled in **Settings** > **Basic** > Website Settings.	Table of Contents screenshot, #1
Glossary	Table of contents glossary link text	The "Glossary" link displayed in the table of contents, if Add a glossary link to the top of the table of contents is enabled in **Settings** > **Basic** > Website Settings.	Table of Contents screenshot, #2
Full PDF Download	Table of contents full PDF download link text	The link to the full PDF download that is displayed in the table of contents if Add a link to the full PDF download to table of contents is enabled in **Settings** > **Basic** > Website Settings	Table of Contents screenshot, #3

Breadcrumbs screenshot

If Breadcrumbs are enabled, all content will display a breadcrumb beginning with the "Home" text, which you can customize:

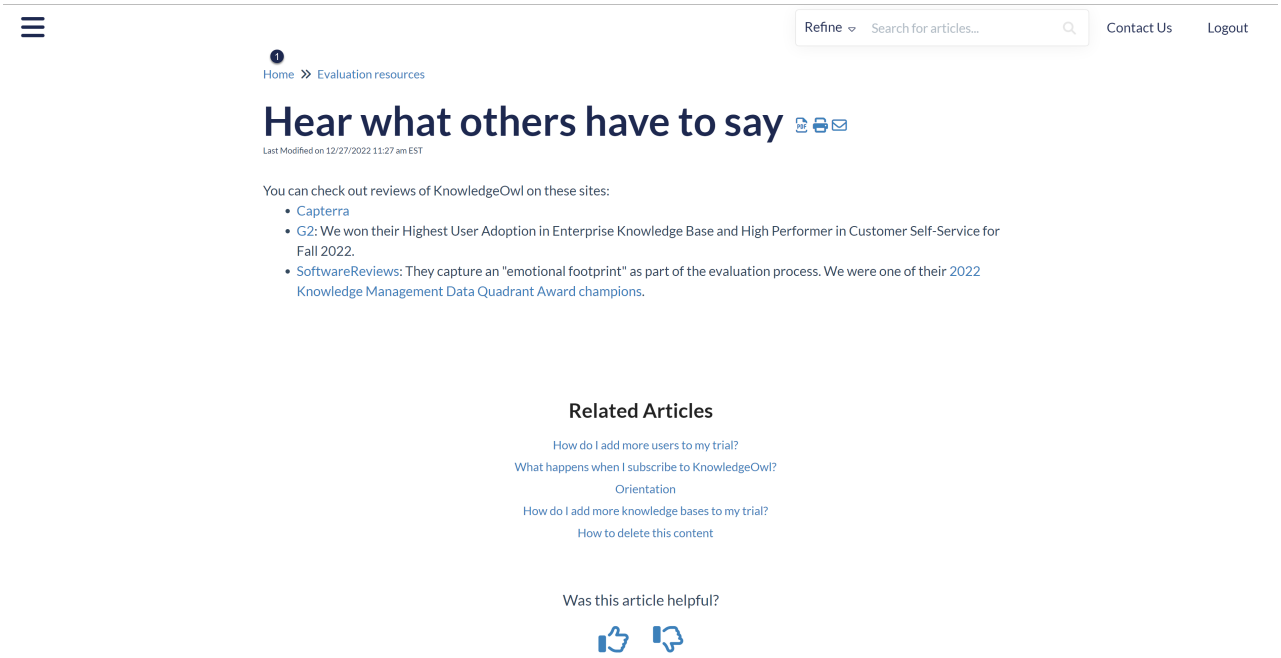
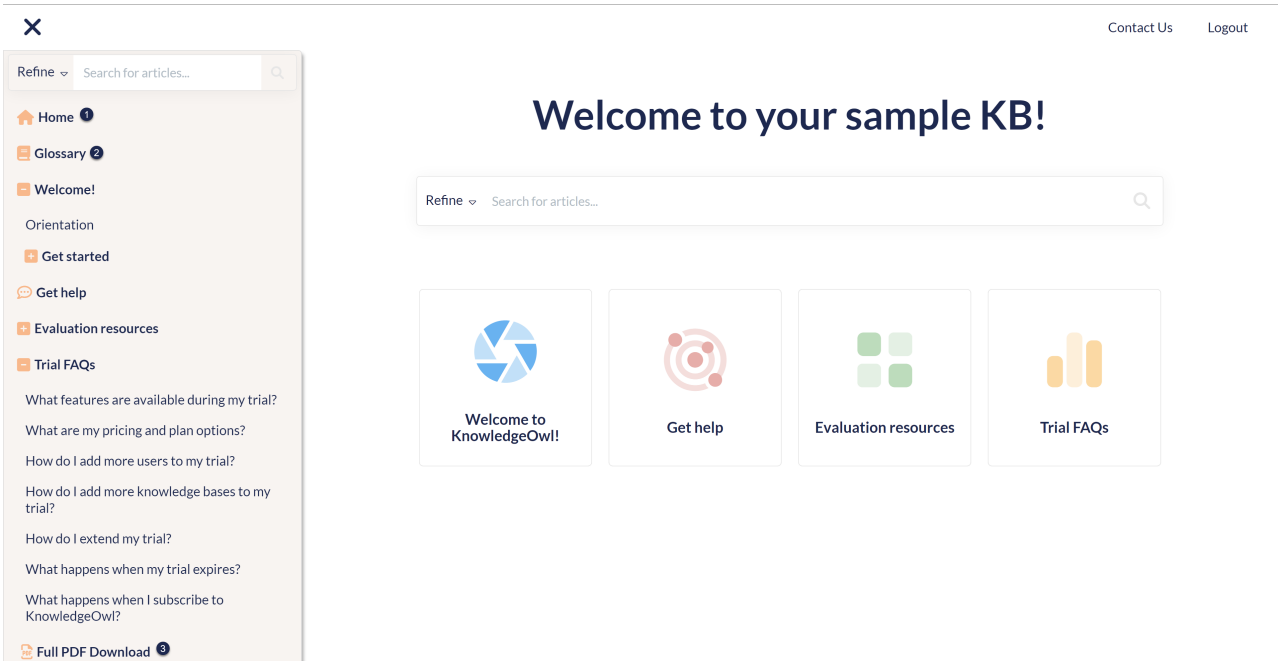


Table of Contents screenshot

The Table of Contents options highlighted here are all set in **Settings** > **Basic** in the **Website Settings** section:



Section breakdown: Top Navigation

Last Modified on 05/29/2024 5:28 pm EDT

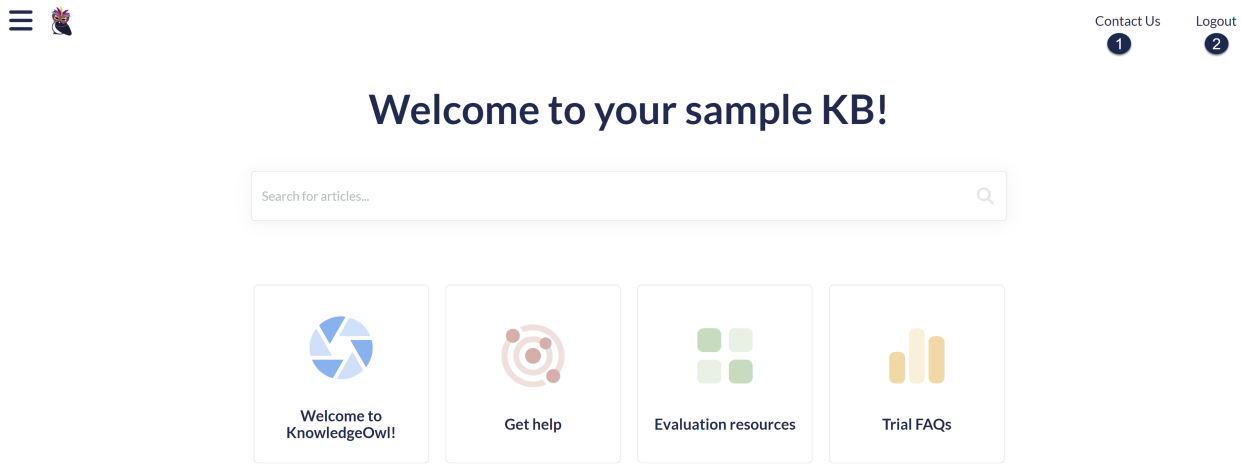
Here's a full list of the Default Text Strings available in the Top Navigation Knowledge Base Section, with accompanying screenshots to show how they're used:

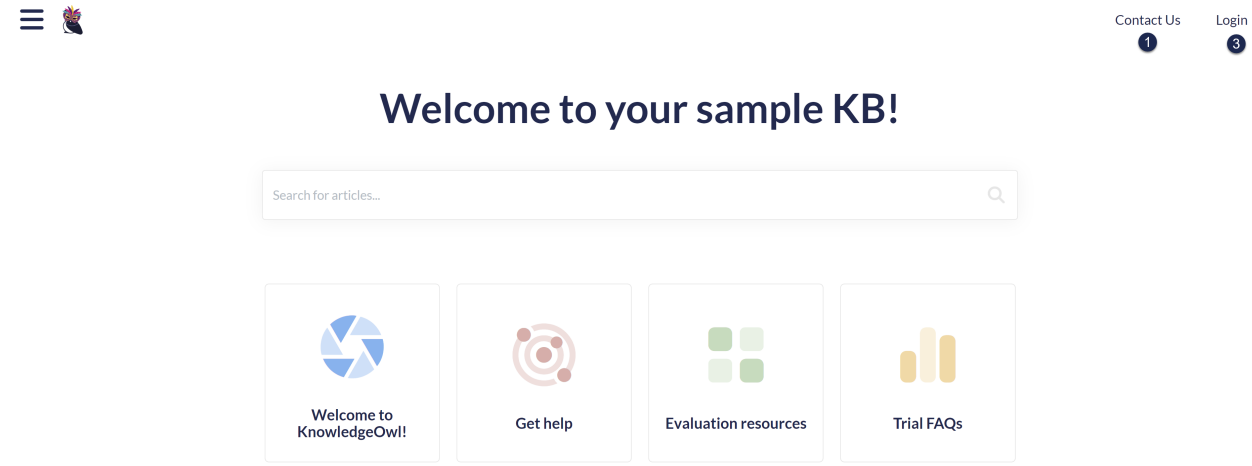
Default Text String	Description	Additional notes/description	Screenshot References
Knowledge Base Logo	Knowledge base logo alt text	This sets the alt text used where your knowledge base logo is used; it won't impact the visual display of the logo at all. It will only be displayed to readers if the logo image is broken, and can be read by screen-readers.	Top Navigation text-only screenshot, #4
Contact Us	Text for link to Contact Form	This adjusts the text used for the link to the Contact Form. Only applies if you have the Contact Form enabled and the contact template merge code used.	Top Navigation visible screenshot, #1
Login	Text for reader login option	This adjusts the text for the "login" option if your **Settings > Security** has default access set to public and has reader logins enabled but also has reader logins enabled.	Top Navigation visible screenshot, #3
Logout	Text for reader logout option	If reader logins are enabled, this adjusts the text for the "logout" link.	Top Navigation visible screenshot, #2

Default Text String	Description	Additional notes/description	Screenshot References
Toggle navigation	Text for search icon on mobile devices, screen-reader only	On mobile devices where the screen is quite small, the search bar in top navigation is collapsed under an icon. This text label is used for screen-readers only. If you have a knowledge base created before June 2023, you'll also need to update **Settings > Style** to recognize these text changes. See Update Style Settings with Customize Text merge code for more details.	Top Navigation text-only screenshot, #5
Table of Contents	Text for table of contents button, screen-reader only	This text label is used as the text for the Table of Contents button. It is generally only displayed to screen-readers. If you have a knowledge base created before June 2023, you'll also need to update **Settings > Style** to recognize these text changes. See Update Style Settings with Customize Text merge code for more details.	Top Navigation text-only screenshot, #6

Top Navigation visible screenshots

These Top Navigation elements are hyperlinks visible to all readers if the feature is enabled:





Top Navigation text-only screenshot

These Top Navigation text options are generally only used by screen-readers or if there are problems displaying logos or icons. Unless one of these situations happens, you can really only see them by looking at the underlying HTML:

```
<!DOCTYPE html>
<html lang="en">
 ▶ <head>…</head>
 ▼ <body class="hg-site hg-minimalist-theme  hg-home-page hg-2column-layout" cz-shortcut-listen="true">
••• ▼ <nav class="hg-header navbar navbar-default navbar-fixed-top" role="navigation"> == $0
     ::before
   ▼ <div class="ko-nav-wrapper">
     ▼ <div class="navbar-header">
         ::before
       ▶ <button type="button" class="ko-slideout-left-toggle">…</button>
       ▼ <a class="navbar-brand" href="/help" title="your sample KB">
           <img class="documentation-logo-image" alt="Knowledge Base Logo" src="//dyzz9obi78pm5.cloudfront.net/app/image/id/63e2960…/n/kate-v21.svg">
         </a>
         <div class="hg-project-name">Test for content seeding</div>
       ▶ <div class="nav-left-searchbar hidden-xs">…</div>
       ▼ <button type="button" class="navbar-toggle toc-toggle pull-left clear-left" data-toggle="collapse" data-target=".documentation-categories">
           <span class="sr-only">Table of Contents</span>
           <span class="browse">Table of Contents</span>
           <span class="icon-bar"></span>
           <span class="icon-bar"></span>
           <span class="icon-bar"></span>
         </button>
       ▼ <button type="button" class="navbar-toggle" data-toggle="collapse" data-target=".navbar-collapse">
           <span class="sr-only">Toggle navigation</span>
           <span class="icon-bar"></spa
           <span class="icon-bar"></span>
           <span class="icon-bar"></span>
         </button>
         ::after
```

4

5

6

#5 and #6 (the screen reader only text) may require some updates to your Style Settings. See Update Style Settings with Customize Text merge code for more details.

Section breakdown: Reader Login

Last Modified on 07/10/2024 1:52 pm EDT

Reader Login text customizations are only necessary if the Reader Login page is being used in your knowledge base. The Reader Login page will be shown if you have Enabled reader logins and:

- Default Access is set to public + someone clicks the Login link
- Default Access is set to Restrict by reader logins and someone navigates to any article or the homepage without being logged in

Here's a full list of the Default Text Strings available in the Customize Text Reader Login Knowledge Base Section, with accompanying screenshots to show how they're used:

Default Text String	Description	Additional notes/description	Screenshot References
Login	Login form title	The title displayed on the login form	Reader login screenshot, #1
Username	Username input label	The label used to prompt the reader for their username.	Reader login screenshot, #2
Password	Password input label	The label used to prompt the reader for their password.	Reader login screenshot, #3
Reset Password	Reset password link text	The text for the Reset password link displayed on the login.	Reader login screenshot, #4
Reset Password	Reset password header text	When a reader has clicked the link to reset their password, this is the header of the pop-up that opens.	Reset password screenshot, #9
Email Address	Password reset email address input label	When a reader has clicked the link to reset their password, this is label used to prompt the reader for their email address.	Reset password screenshot, #10
Cancel	Reset password cancel button text	When a reader has clicked the link to reset their password, this is the label for the "Cancel" button to back out/not reset the password.	Reset password screenshot, #11
Reset Password	Reset password confirmation button text	When a reader has clicked the link to reset their password, this is the label for the button to confirm the password reset.	Reset password screenshot, #12
Submit	Login button text	The button to submit the login credentials.	Reader login screenshot, #5
Continue as Guest	Guest login button text	This link will only appear if the Default Access is set to Public AND the reader login form has been enabled.	Reader login screenshot, #6
Don't have a login?	Signup link intro text	This text only appears if you have Reader signups enabled.	Reader login screenshot, #7

Default Text String	Description	Additional notes/description	Screenshot References
Click here to signup.	Signup link text	This link only appears if you have Reader signups enabled.	Reader login screenshot, #8
Signup	Signup header text	This header is on a pop-up that only appears if you have Reader signups enabled and someone has clicked the Signup link.	Reader signup screenshot, #13
Email Address	Signup email address input label	This input is in a pop-up that only appears if you have Reader signups enabled and someone has clicked the Signup link. The name entered here will be stored as the reader's email address and is what they'll use to login.	Reader signup screenshot, #14
First Name	Signup first name input label	This input is in a pop-up that only appears if you have Reader signups enabled and someone has clicked the Signup link. The name entered here will be stored as the reader's first name in **Readers**.	Reader signup screenshot, #15
Last Name	Signup last name input label	This input is in a pop-up that only appears if you have Reader signups enabled and someone has clicked the Signup link. The name entered here will be stored as the reader's last name in **Readers**.	Reader signup screenshot, #16
Signup	Signup confirmation button text	This button is in a pop-up that only appears if you have Reader signups enabled and someone has clicked the Signup link.	Reader signup screenshot, #17
Cancel	Signup cancel button text	This button is in a pop-up that only appears if you have Reader signups enabled and someone has clicked the Signup link.	Reader signup screenshot, #18

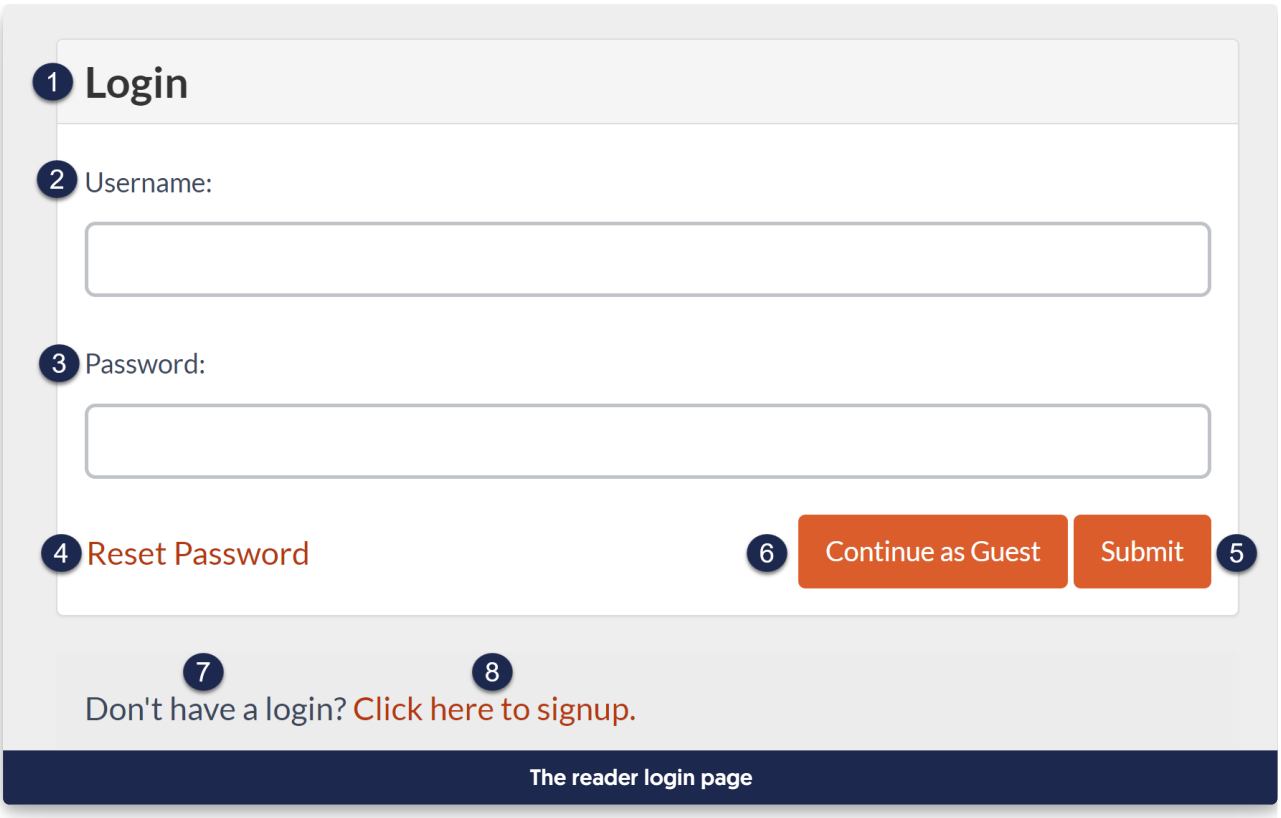


If you are using custom fields in the reader signup form, the text for those fields can be changed in your **profile icon/name > Readers > Settings**.

Reader login screenshot

The Reader Login page will be shown if you have Enabled reader logins and:

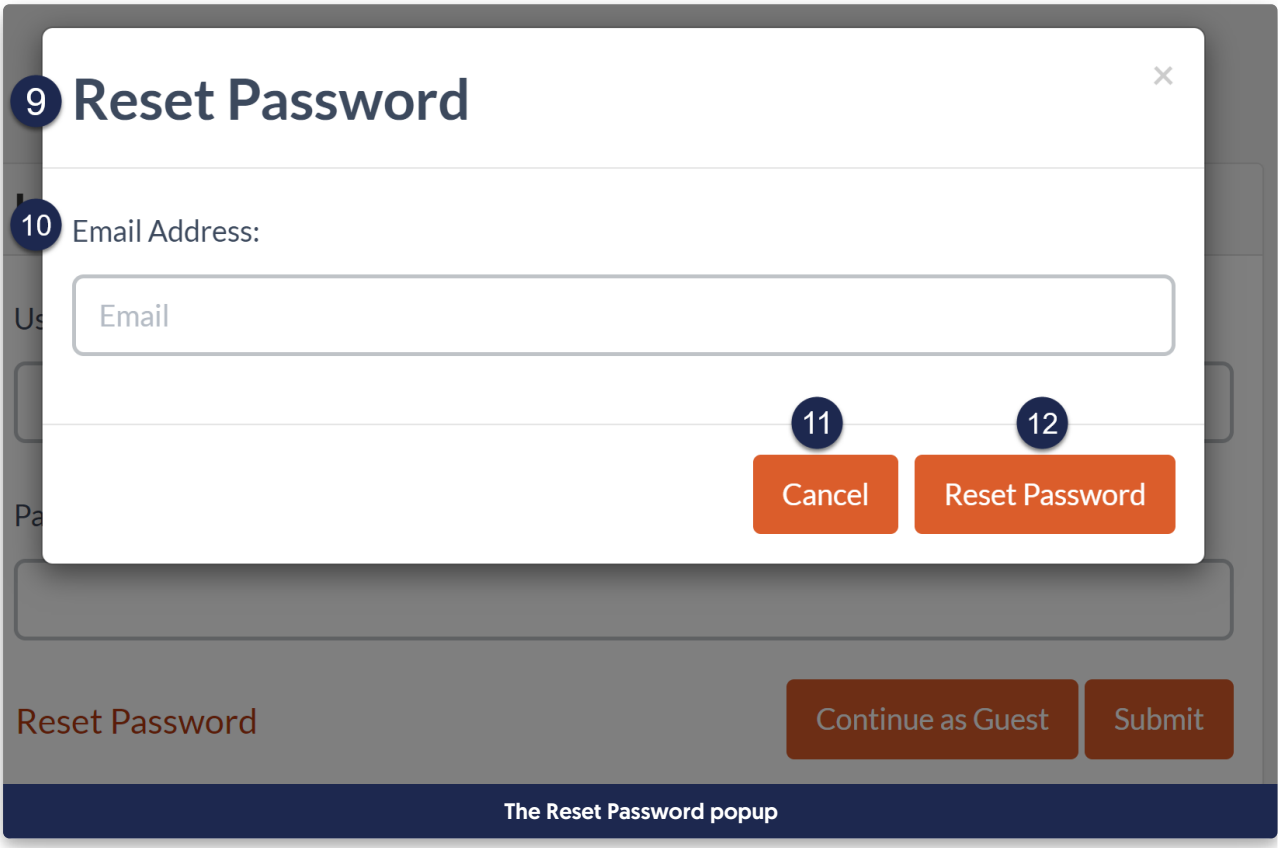
- Default Access is set to public + someone clicks the Login link
- Default Access is set to Restrict by reader logins and someone navigates to any article or the homepage without being logged in



The reader login page

Reset password screenshot

The Reset Password pop-up will open once someone clicks the Reset Password link on the main Reader Login page.

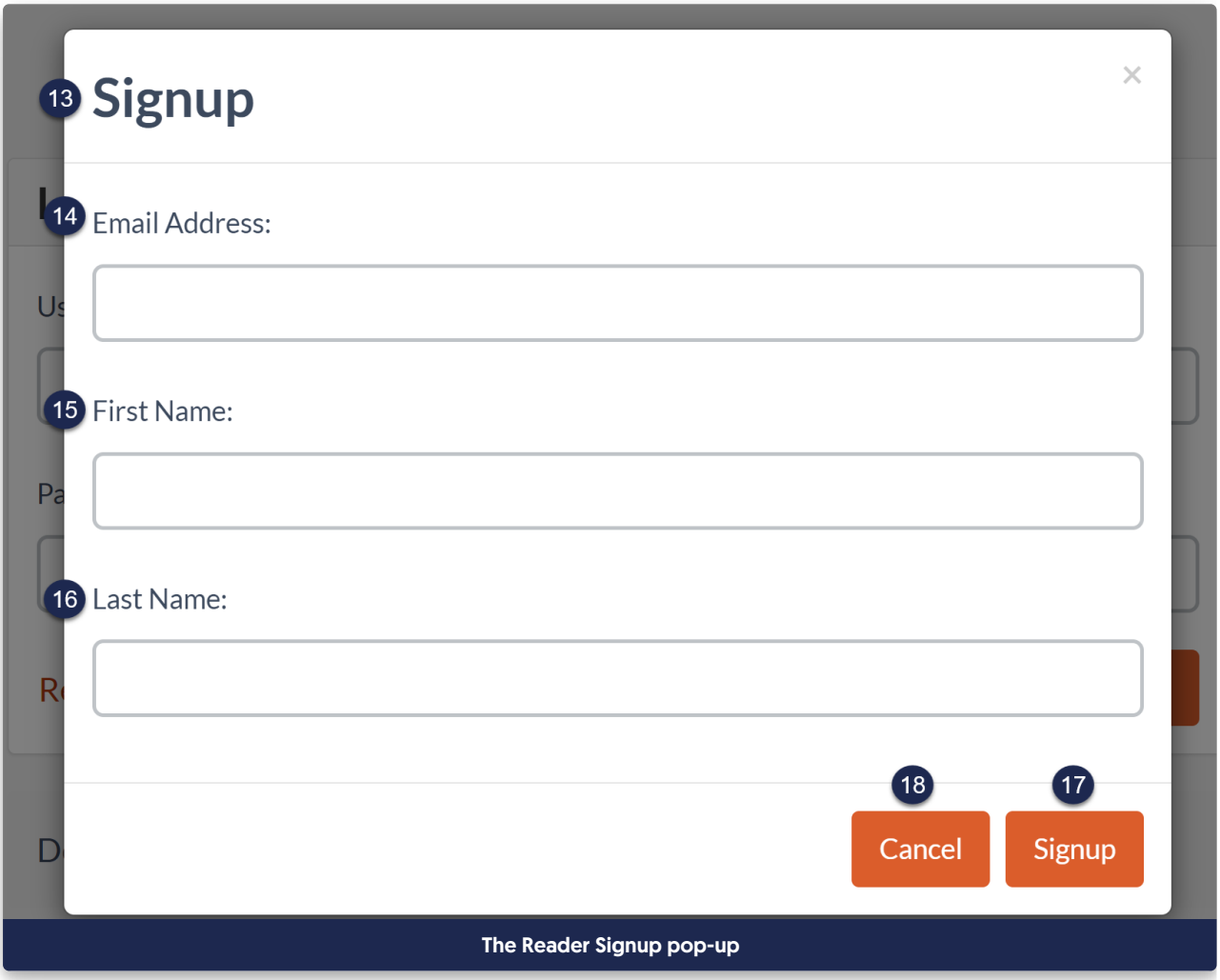


The Reset Password popup

Reader signup screenshot

The Reader signup text and link will only be displayed in the main Reader Login page if you have enabled Reader signups. If you aren't using Reader signups, you can ignore these text strings.

If you have enabled any custom fields in the reader signup form, the text for those can be edited in your **profile icon/name > Readers > Settings** in the **Reader Signup Custom Fields** section.



The Reader Signup pop-up

Section breakdown: Article

Last Modified on 05/29/2024 5:28 pm EDT

Here's a full list of the Default Text Strings available in the Article Knowledge Base Section, with accompanying screenshots to show how they're used:

Default Text String	Description	Additional notes/description	Screenshot References
Last Modified on	Last modified timestamp label	This text is displayed beneath the article's title in both the live knowledge base and in Individual article PDFs (if used). It precedes the Last updated date. If you have a knowledge base created before June 2023, you'll also need to update **Settings > Style** to recognize these text changes. See Update Style Settings with Customize Text merge code for more details.	Full Article screenshot, #1
Related Articles	Related articles list heading	Only applicable if you are using Related Articles. If you have a knowledge base created before June 2023, you'll also need to update **Settings > Style** to recognize these text changes. See Update Style Settings with Customize Text merge code for more details.	Full Article screenshot, #2
Download PDF	Download PDF button name and title	If you are displaying individual article PDFs, this text is displayed when someone hovers over the PDF icon (or when they are using a screen reader).	Article Header screenshot, #12
How would you rate this article?	Article star rating label	If article ratings are enabled and set to 5 Star Rating, this text will display as the rating prompt.	Article Ratings screenshots, #7

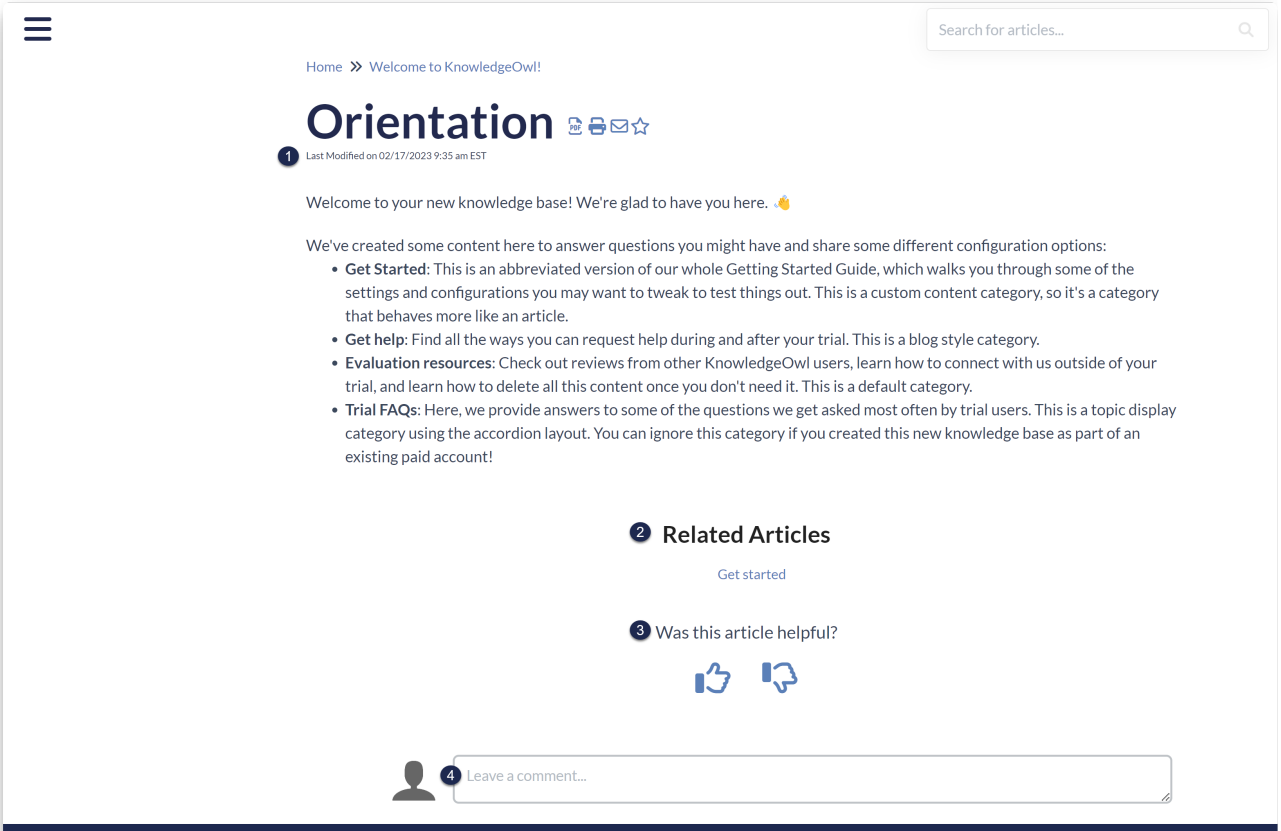
Default Text String	Description	Additional notes/description	Screenshot References
Was this article helpful?	Article thumbs rating label	If article ratings are enabled and set to Thumbs Up / Thumbs Down, this text will display as the rating prompt.	Full Article screenshot, #3
Helpful	Name and title for the helpful rating link	If article ratings are enabled and set to Thumbs Up / Thumbs Down, this text will display when someone hovers over the thumbs up icon.	Article Ratings screenshots, #5
Unhelpful	Name and title for the unhelpful rating link	If article ratings are enabled and set to Thumbs Up / Thumbs Down, this text will display when someone hovers over the thumbs down icon.	Article Ratings screenshots, #6
Thank you for your feedback!	Rating success message	This message is displayed if article ratings are enabled and someone has submitted a rating. It replaces the rating section entirely.	Article Ratings screenshots, #13
Leave a comment...	Article comment placeholder text	If comments are enabled, this placeholder text is displayed in the Comments box.	Full Article screenshot, #4
User Icon	Alt text for user icons	If comments are enabled, this is the alt text for the user icon. It is only displayed if the user icon image can't load.	N/A
Change User Icon	Label for change user icon button	If comments are enabled, this is the label for the "change user icon" link displayed. (It will appear once someone activates the comments text box.)	Article Comments screenshots, #8
Submit	Label for comment submit button	If comments are enabled, this is the text displayed on the Submit button. (It will appear once someone activates the comments text box.)	Article Comments screenshots, #9
Submit comment	Title attribute for comment submit button	If comments are enabled, this is the text that will display when a reader hovers over the Submit button.	Article Comments screenshots, #10

Default Text String	Description	Additional notes/description	Screenshot References
Thank you! Your comment has been submitted for approval.	Feedback text shown when a comment is submitted.	If comments are enabled and someone has submitted a comment, this text will display as confirmation that their comment was submitted.	Article Comments screenshots, #11
Version Number	Version number or custom identifier	The text label for an inactive version's number. Currently used in version PDFs only.	Article Version PDF screenshot, #1
Version Author	Name of author who created this version	The text label for the author who created an inactive version Currently used in version PDFs only. Only populated for versions created after 11 October 2023.	Article Version PDF screenshot, #2
Version Creation Date	Date this version was created	The date and timestamp when an inactive version was first created. Currently used in version PDFs only. May not be populated for versions created before 11 October 2023.	Article Version PDF screenshot, #3
Version Activation Date	Date this version was activated	The date and timestamp when an inactive version was activated. Currently used in version PDFs only. Only populated for versions activated after 11 October 2023.	Article Version PDF screenshot, #4
Author Activating	Author who activated this version	The text label for the author who activated a version. Currently used in version PDFs only. Only populated for versions activated after 11 October 2023.	Article Version PDF screenshot, #5
Version Deactivation Date	Date this version was deactivated	The date and timestamp when an active version was deactivated. Currently used in version PDFs only. Only populated for versions deactivated after 11 October 2023.	Article Version PDF screenshot, #6

Default Text String	Description	Additional notes/description	Screenshot References
Author Deactivating	Author who deactivated this version	The text label for the author who deactivated a version by activating another one. Currently used in version PDFs only. Only populated for versions deactivated after 11 October 2023.	Article Version PDF screenshot, #7

Full Article screenshot

Here are where most of the text string sections appear within a full article:



Full Article Screenshot

#2 is only relevant if you are using Related Articles.

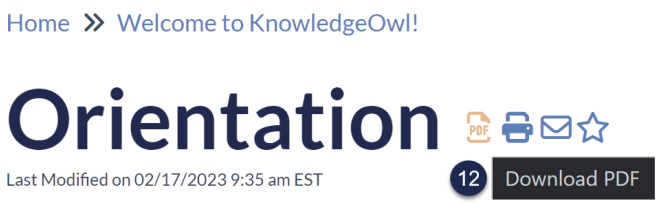
#3 is only relevant if Ratings have been enabled and the Thumbs Up / Thumbs Down rating type is used.

#4 is only relevant if Comments are enabled.

#1 and #2 (Last modified on and Related Articles) may require some updates to your Style Settings. See Update Style Settings with Customize Text merge code for more details.

Article Header screenshot

The Download PDF text string is only visible when someone hovers over the PDF icon in the header (and if the PDF icon is displayed in the article):



Article Rating screenshots

The screenshots below only apply if Ratings have been enabled.

The Helpful and Unhelpful text strings are displayed when the Thumbs Up / Thumbs Down rating type is used and someone hovers over the icons:

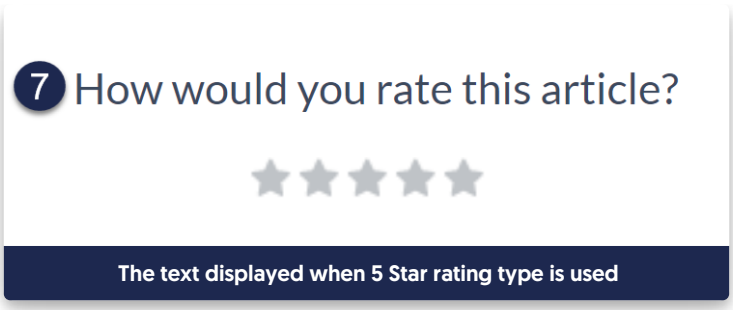


Hovering over the thumbs up icon



Hovering over the thumbs down icon

When the 5 Star rating type is used, a different text string displays above the stars:



The text displayed when 5 Star rating type is used

With either Article Rating type, once someone submits a rating, the ratings section is replaced by the feedback message:



The rating section is replaced with a feedback message once a rating is submitted

Article Comments screenshots

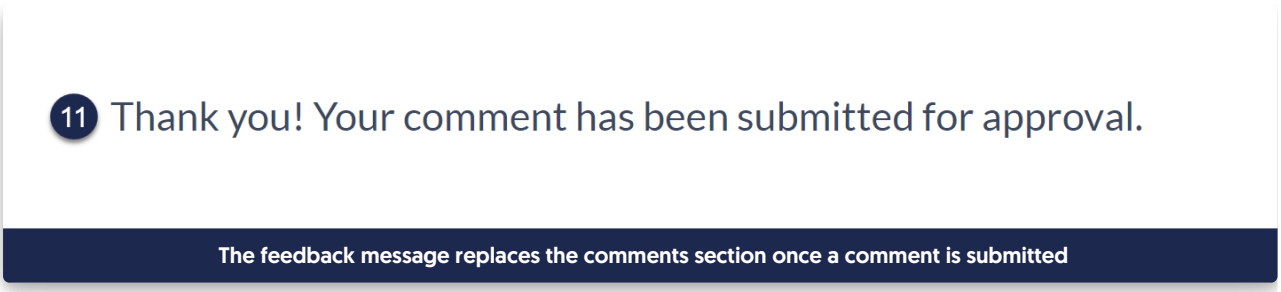
The screenshots in this section only apply if Comments are enabled.

Once someone clicks in the comments placeholder, the Change User Icon link and Submit button appear. Hovering over the Submit button will display the Submit comment text string.



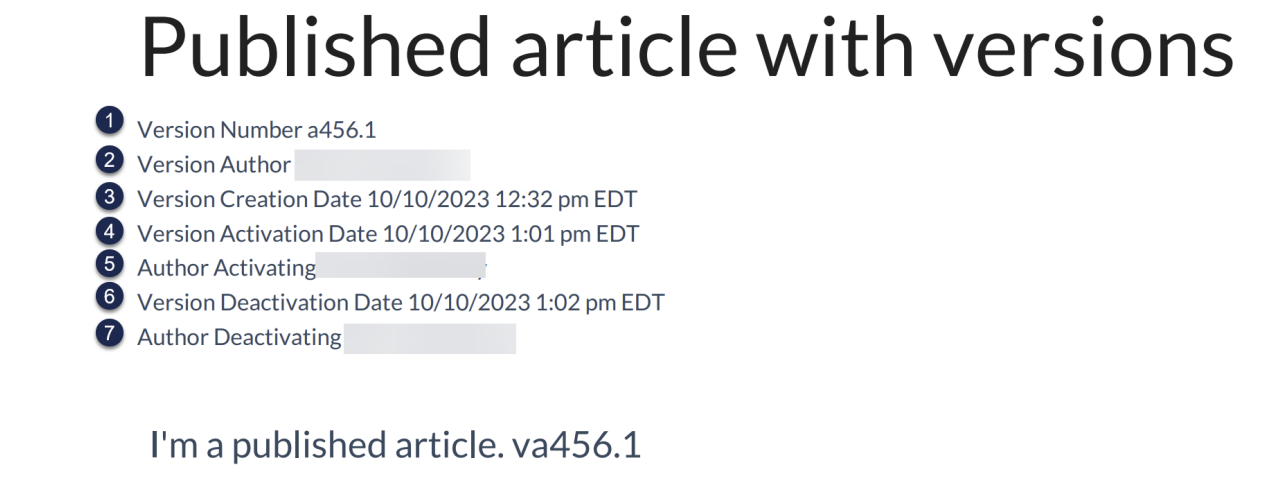
The comments section as it appears once someone clicks into the comments text box.

Once someone submits a comment, the comments section is replaced with feedback text:



Article Version PDF screenshot

The text strings below are currently only used in article version PDFs. Many of these text strings will be empty for versions created, activated, or deactivated prior to 11 October 2023. The layout of these PDFs may look different if you've edited Settings > Style > Custom HTML > Article Version.



Section breakdown: Miscellaneous

Last Modified on 05/29/2024 5:28 pm EDT

Here's a full list of the Default Text Strings available in the Miscellaneous Knowledge Base Section, with accompanying screenshots to show how they're used:

Default Text String	Description	Additional notes/description	Screenshot References
Glossary	Glossary page title	The title of the page displayed at /glossary. If the Search Setting to Add the glossary page to your search results is enabled, the word "glossary" and the custom text string you enter here will return the glossary page in search results.	Glossary screenshot, #1

Glossary screenshot

The Glossary page title is the header displayed at the top of the /glossary page in your knowledge base:



If you customize this text string and you have the Add the glossary page to your search results option enabled in **Settings > Search**, the Glossary page will be returned as a result when someone searches:

- The word "glossary"
- The custom text string you have entered

Be sure to adjust Table of Contents and Search options for Glossary references to get a total re-naming in place!

Section breakdown: Required Reading

Last Modified on 05/29/2024 5:28 pm EDT

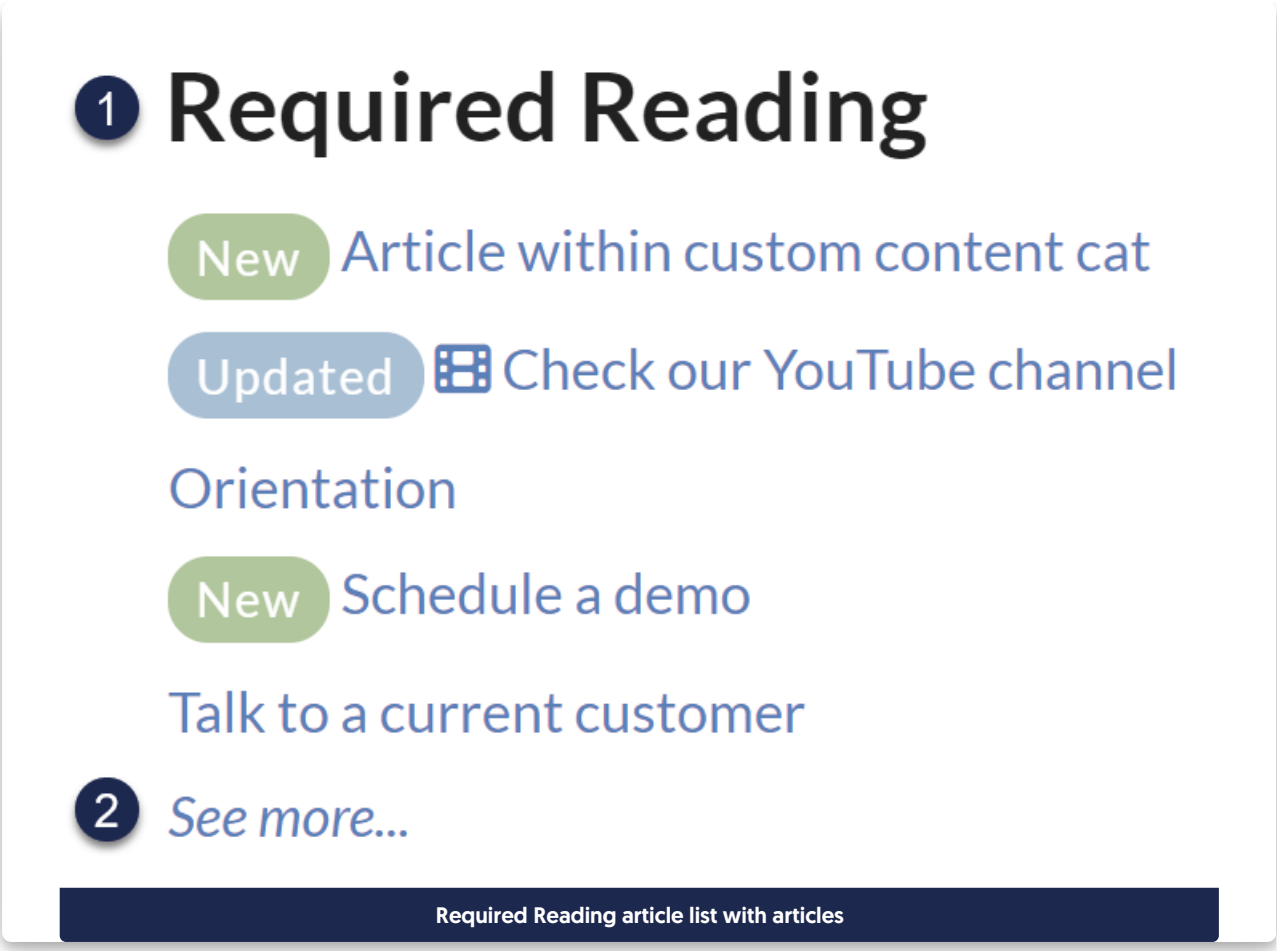
Here's a full list of the Default Text Strings available in the Required Reading Knowledge Base Section, with accompanying screenshots to show how they're used:

Default Text String	Description	Additional notes/description	Screenshot References
Required Reading	Required reading articles list heading	This is the heading for the Required Reading articles list where it is displayed. This article list is not automatically added to new knowledge bases.	Homepage screenshots, #1
Required Reading	Required reading page title	This is the title of the Required Reading page displayed at /{root}/required-reading in your knowledge base (this page also opens when the "See more" link is opened from the Required Reading articles list.)	Required Reading screenshots, #1
Required	Required description in legend at top of required reading page	This is the description of the required icon displayed in the legend at the top of the Required Reading page.	Required Reading screenshots, #2
Acknowledged	Acknowledged description in legend at top of required reading page	This is the description of the acknowledged icon displayed in the legend at the top of the Required Reading page.	Required Reading screenshots, #3
This article is required to read	Article required reading top of page callout	This is the text displayed by the Required Reading flag merge code when a required article has not yet been confirmed as read. You can add this merge code anywhere in your article template.	Article screenshots, #1

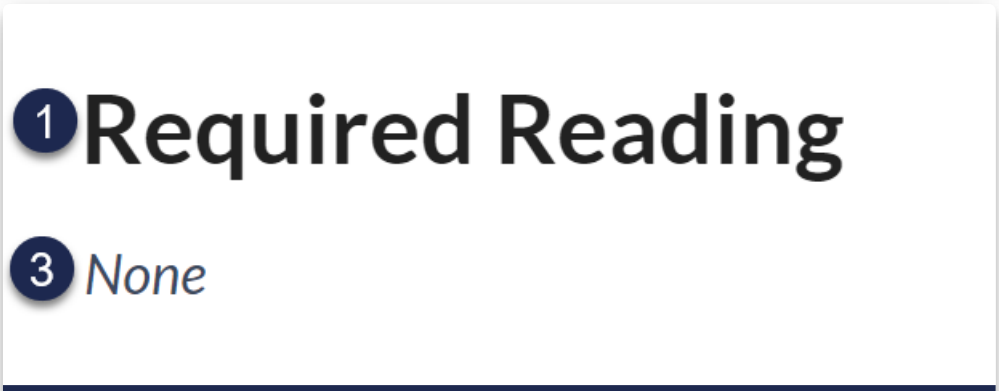
Default Text String	Description	Additional notes/description	Screenshot References
This article is required reading. Please click to confirm that you have read and understood it.	Article required reading checkbox text	This is the text displayed by the Required Reading acknowledgement merge code when a required article has not yet been confirmed as read. You can add this merge code anywhere in your article template.	Article screenshots, #2
Acknowledged	Required reading flag with acknowledgement	This is the text displayed by the Required Reading flag merge code when a required article has been confirmed as read.	Article screenshots, #3
Thank you for reading the article and confirming that you completed it.	Article required reading checkbox text for acknowledged article	This is the text displayed by the Required Reading acknowledgement merge code when a required article has been confirmed as read.	Article screenshots, #4
No results found.	Required reading page message if no required reading found	This message is displayed on the Required Reading page if there are no articles marked as required	Required Reading screenshots, #4
See more...	Required reading article list see more	This is the "See more..." link displayed in the Required Reading articles list when it contains more articles than can be displayed.	Homepage screenshots, #2
None	Required reading article list empty text	The text that is displayed if the Required Reading article list is shown but has no articles within it.	Homepage screenshots, #3

Homepage screenshots

If you add the Required Reading article list to your homepage (or another page), these text fields are the ones we'll display:



Required Reading article list with articles

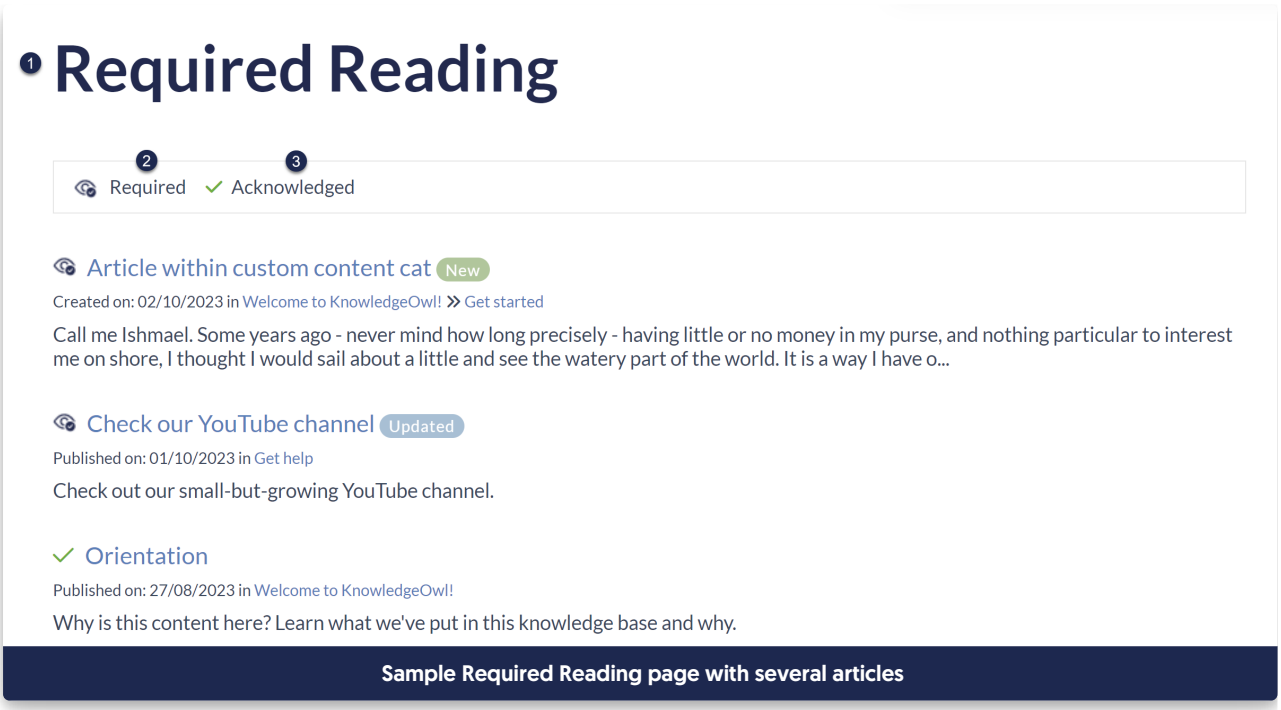


Required Reading article list without articles

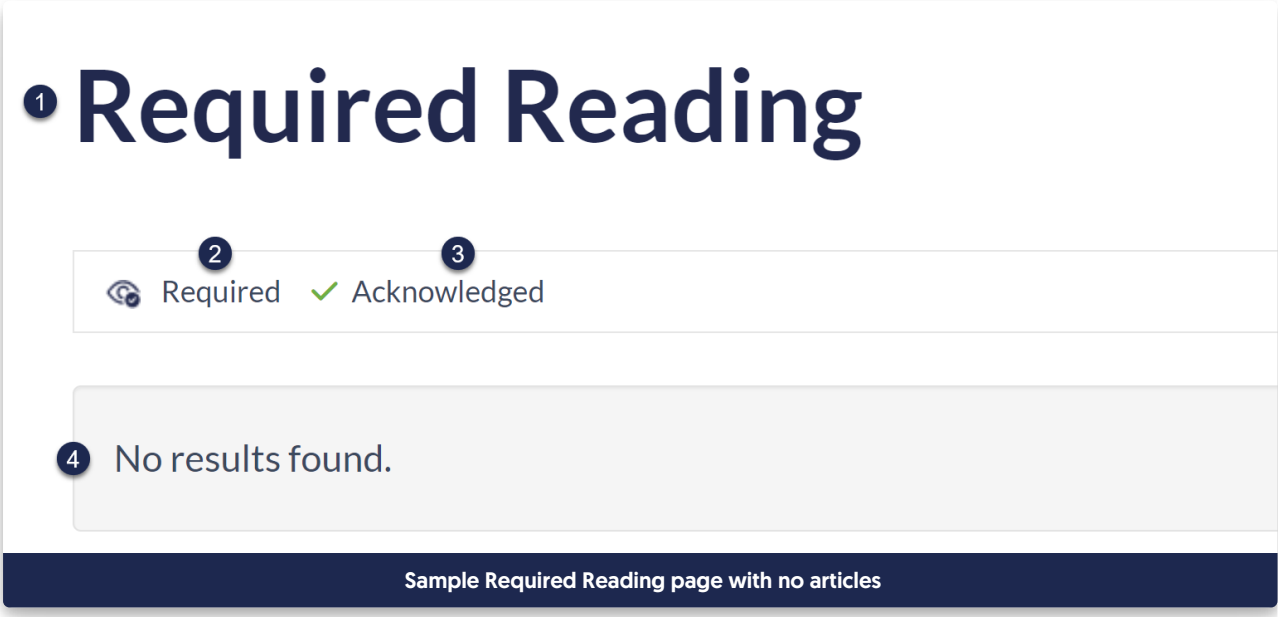
Required Reading screenshots

The Required Reading page can be accessed:

- **by navigating to /{root}/required-reading**
- **by clicking the "See more..." link in the Required Reading article list**



Sample Required Reading page with several articles



Sample Required Reading page with no articles

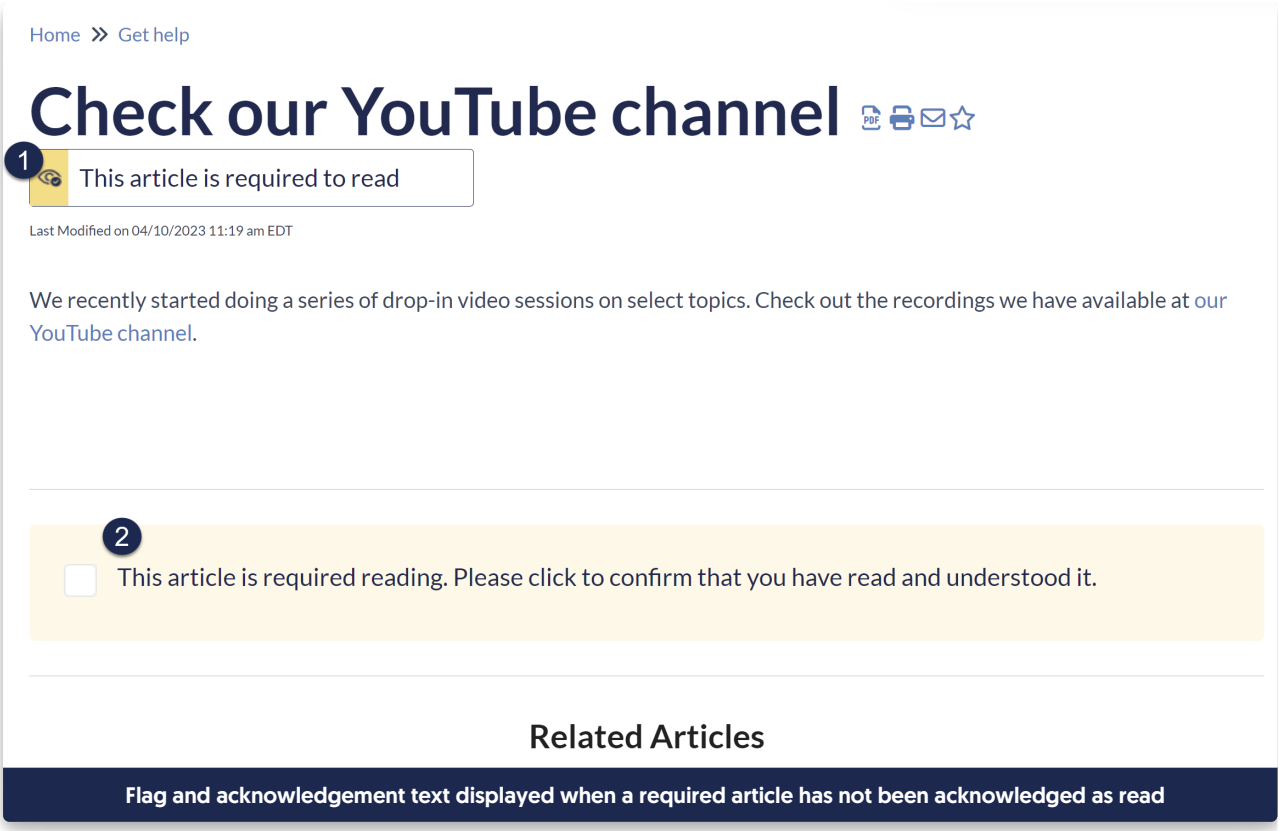
To customize the text in the pagination controls of this page, see Section breakdown: Article Lists for the default text strings for the pagination controls.

Article screenshots

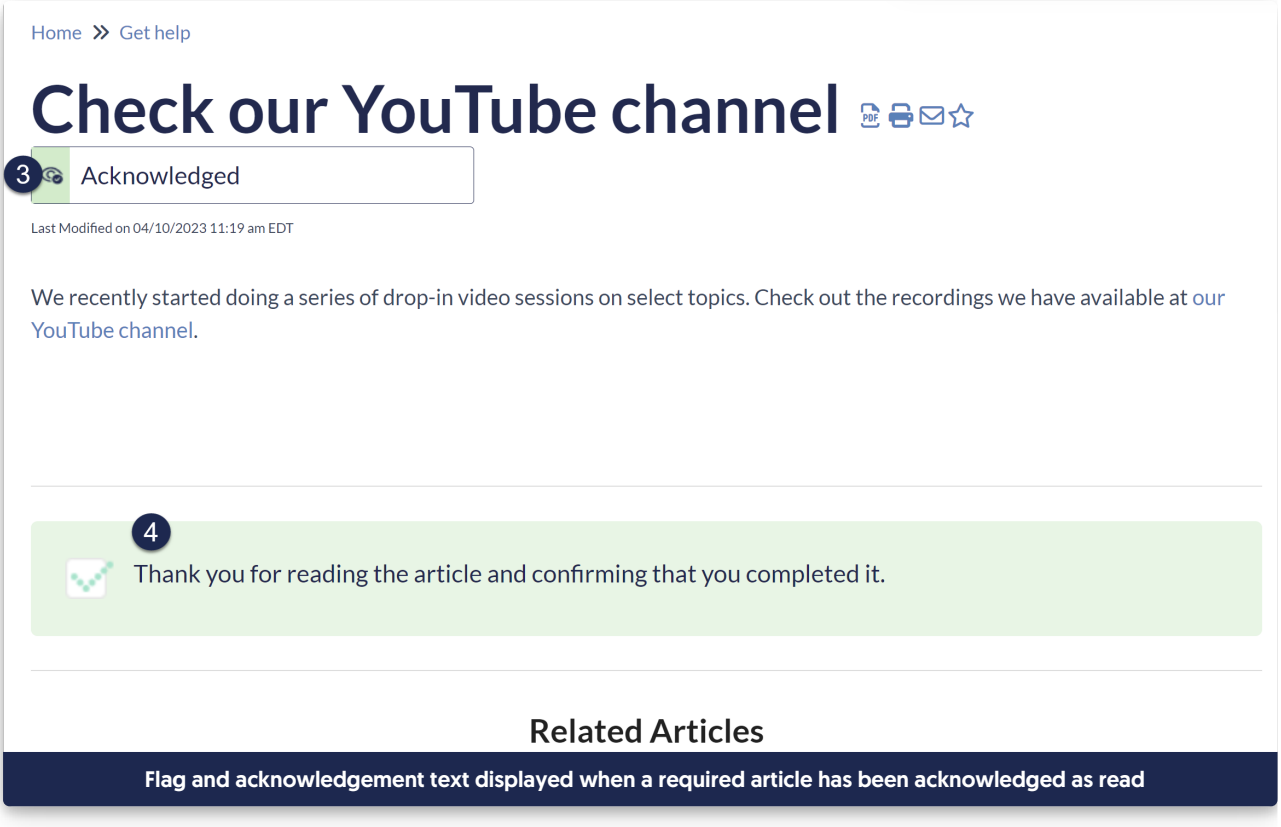
The screenshots below only apply when:

- **Required Reading has been enabled**
- **Merge codes for the flag and acknowledgement are in the Article Custom HTML template**
- **Someone is viewing an article marked as "Required".**

The exact placement of these sections depends on where you've put them:



Flag and acknowledgement text displayed when a required article has not been acknowledged as read



Flag and acknowledgement text displayed when a required article has been acknowledged as read

Section breakdown: Article Lists

Last Modified on 11/29/2024 1:30 pm EST

Here's a full list of the Default Text Strings available in the Article Lists Knowledge Base Section, with accompanying screenshots to show how they're used:

Default Text String	Description	Additional notes/description	Screenshot References
Popular Articles	Popular articles list heading	This is the heading for the Popular Articles list where it is displayed. If you have a knowledge base created before September 2023, you'll also need to update either the top-level **Homepage** or **Settings > Style** to recognize this text change. See Update Style Settings with Customize Text merge code for more details.	Homepage Default Article Lists screenshots, #1
Popular Articles	Popular articles page heading	The heading displayed on the full Popular Articles page (/{root}/popular-articles). This page is opened when someone clicks the "See more..." link in the Popular Articles list.	Popular Articles screenshot, #1
See more...	Popular articles see more	The text displayed at the bottom of the Popular Articles list when it contains more articles than can be displayed.	Homepage Default Article Lists screenshots, #2
None	Popular articles empty text	The text that is displayed if the Popular Articles list is shown but has no articles within it.	Homepage Default Article Lists screenshots, #7

Default Text String	Description	Additional notes/description	Screenshot References
New Articles	New articles list heading	This is the heading for the New Articles list where it is displayed. If you have a knowledge base created before September 2023, you'll also need to update **Settings > Style** to recognize this text change. See Update Style Settings with Customize Text merge code for more details.	Homepage Default Article Lists screenshot, #3
New Articles	New articles page heading	The heading displayed on the full New Articles page (/{root}/new-articles). This page is opened when someone clicks the "See more..." link in the New Articles list.	New Articles screenshot, #1
See more...	New articles see more	The text displayed at the bottom of the New Articles list when it contains more articles than can be displayed.	Homepage Default Article Lists screenshots, #4
None	New articles empty text	The text that is displayed if the New Articles list is shown but has no articles within it.	Homepage Default Article Lists screenshots, #8
Updated Articles	Updated articles list heading	This is the heading for the Updated Articles list where it is displayed. If you have a knowledge base created before September 2023, you'll also need to update **Settings > Style** to recognize this text change. See Update Style Settings with Customize Text merge code for more details.	Homepage Default Article Lists screenshots, #5
Updated Articles	Updated articles page heading	The heading displayed on the full Updated Articles page (/{root}/updated-articles). This page is opened when someone clicks the "See more..." link in the Updated Articles list.	Updated Articles screenshot, #1

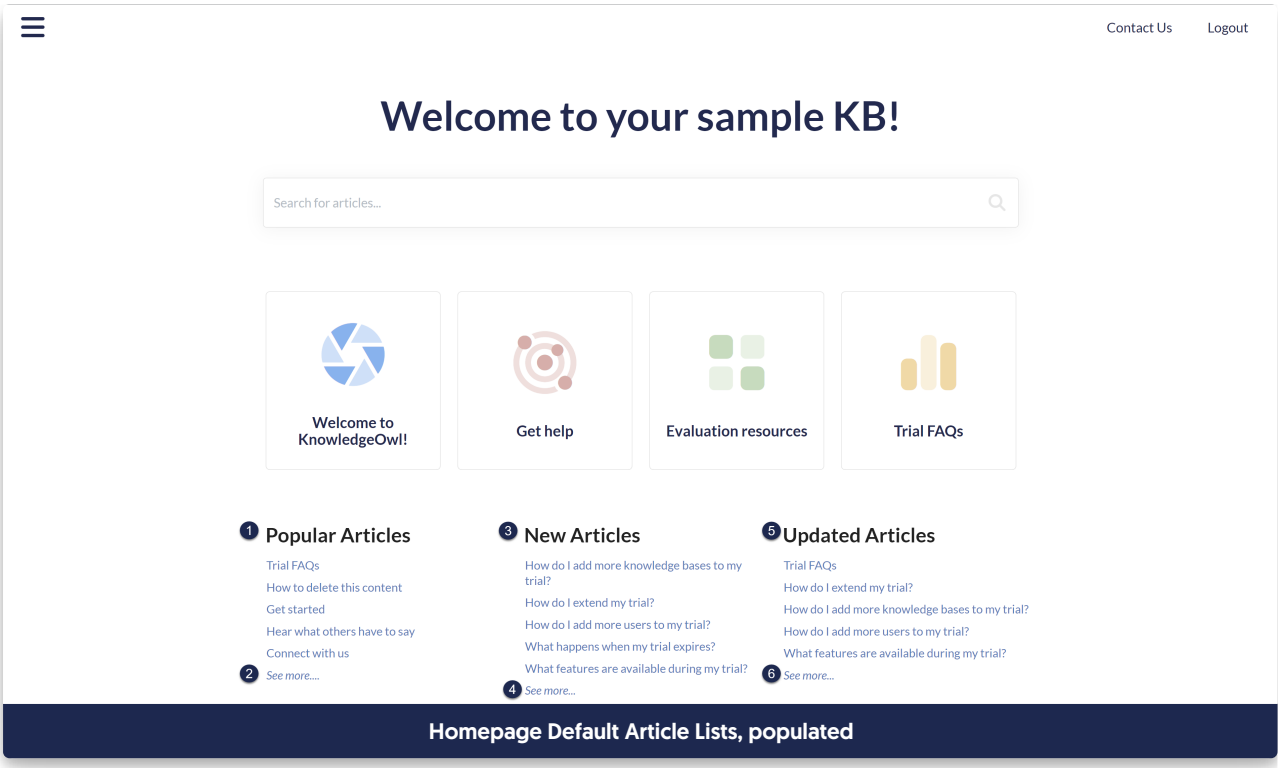
Default Text String	Description	Additional notes/description	Screenshot References
See more...	Updated articles see more	The text displayed at the bottom of the Updated Articles list when it contains more articles than can be displayed.	Homepage Default Article Lists screenshots, #6
None	Updated articles empty text	The text that is displayed if the Updated Articles list is shown but has no articles within it.	Homepage Default Article Lists screenshots, #9
Recent Articles	Recent articles heading	This is the heading for the Recent Articles list where it is displayed. This article list is not automatically added to new knowledge bases. If you've added the list yourself, you may need to update **Homepage** or **Settings > Style** to recognize this text change. See Update Style Settings with Customize Text merge code for more details.	Optional Article Lists screenshot, #1
None	Recent articles empty text	The text that is displayed if the Recent Articles list is shown but has no articles within it.	Optional Article Lists screenshot, #2
Favorite Articles	Favorite articles heading	This is the heading for the Favorite Articles list where it is displayed. This article list is not automatically added to new knowledge bases. If you've added the list yourself, you may need to update **Homepage** or **Settings > Style** to recognize this text change. See Update Style Settings with Customize Text merge code for more details.	Optional Article Lists screenshots, #3
Favorite Articles	Favorite articles page heading	The heading displayed on the full Favorite Articles page (/{root}/favorite-articles). This page is opened when someone clicks the "See more..." link in the Favorite Articles list.	Favorite Articles screenshot, #1

Default Text String	Description	Additional notes/description	Screenshot References
See more...	Favorite articles see more	The text displayed at the bottom of the Favorite Articles list when it contains more articles than can be displayed.	Optional Article lists screenshot, #5
None	Favorite articles empty text	The text that is displayed if the Favorite Articles list is shown but has no articles within it.	Optional Article Lists screenshot, #4
Last Updated:	Popular articles last updated label	This wording introduces the last updated date for each article in the Popular Articles page. If you've customized your Search results text strings to replace Last Updated, we recommended matching those changes here.	Popular Articles screenshot, #2
Last Updated:	Updated articles last updated label	This wording introduces the last updated date for each article in the Updated Articles page. If you've customized your Search results text strings to replace Last Updated, we recommended matching those changes here.	Updated Articles screenshot, #2
Created On:	New articles created on label	On the New Articles page, this wording introduces the creation date for each article. If you've customized your Search results text strings to replace Created On, we recommended matching those changes here.	New Articles screenshot, #2
Published On:	New articles published on label	On the New Articles page, this wording introduces the published date for each article. This text is only shown if a published date has been explicitly added to an article AND if that date is more different from the date the article was created.	New Articles screenshot, #3

Default Text String	Description	Additional notes/description	Screenshot References
More	Article list pagination next button label	When the New, Popular, or Updated Articles page contain more articles than they can hold, this is the label for the control that navigates to the next page.	Article List Pagination screenshot, #4
Back	Article list pagination previous button label	When the New, Popular, or Updated Articles page contain more articles than they can hold, this is the label for the control that navigates to the previous page.	Article List Pagination screenshot, #1
Viewing	Article list current page label	When the New, Popular, or Updated Articles page contain more articles than they can hold, this is the label to indicate which articles in the list you're currently viewing.	Article List Pagination screenshot, #2
of	Article list current page preposition	When the New, Popular, or Updated Articles page contain more articles than they can hold, this is the label to offset what you're currently viewing from the total number of articles.	Article List Pagination screenshot, #3

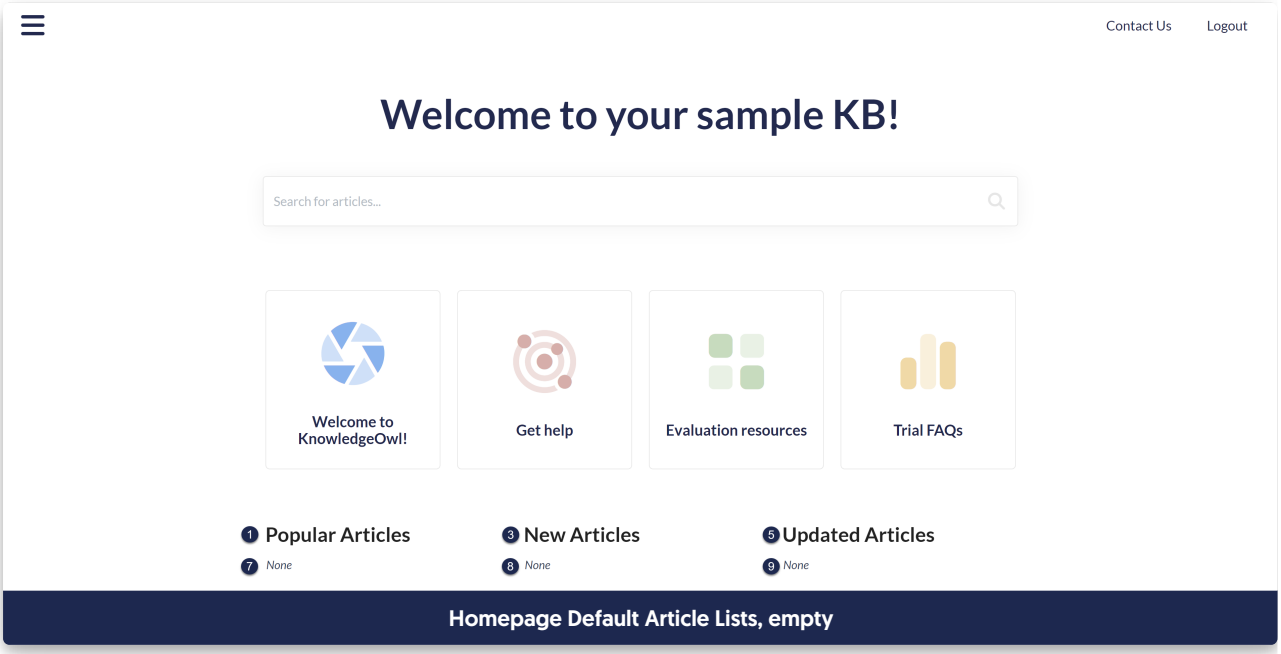
Homepage Default Article Lists screenshots

By default, new knowledge bases are created with the Popular Articles, New Articles, and Updated Articles sections on the homepage:



Homepage Default Article Lists, populated

#1, #3, and #5 (the titles for each list) may require some updates to **Settings > Style** or **Homepage**. See **Update Style Settings with Customize Text merge code** and **Update Homepage with Customize Text merge code** for more details.

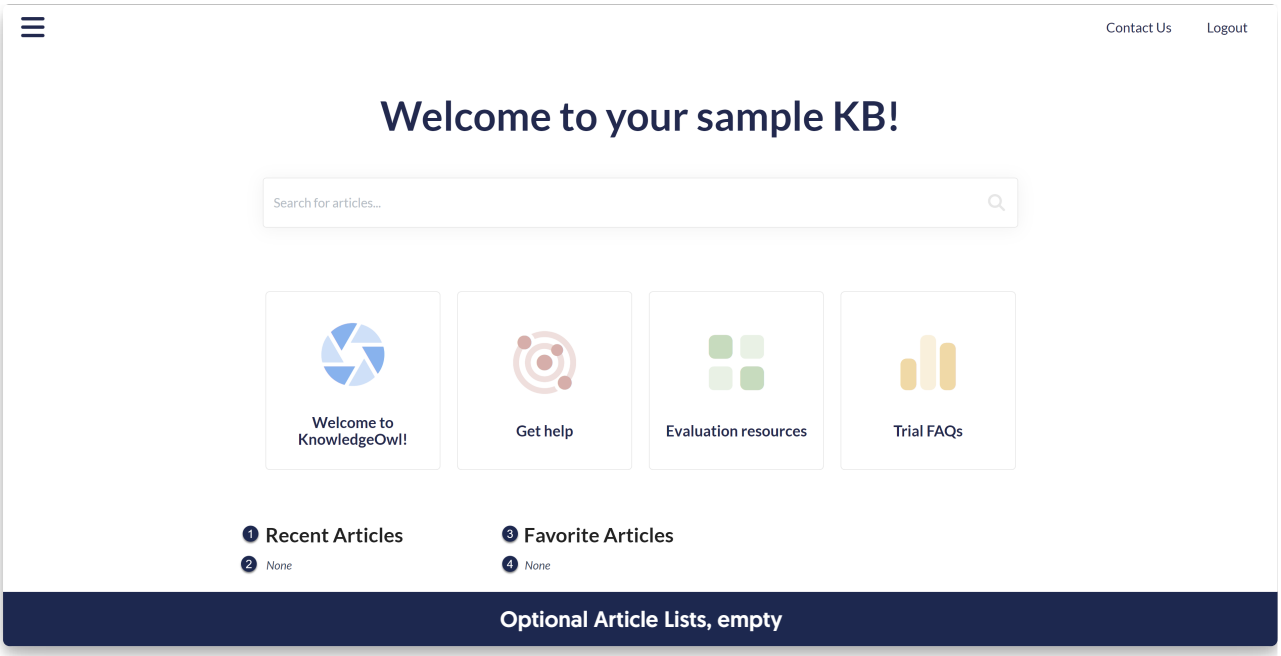


Homepage Default Article Lists, empty

Optional Article Lists screenshot

The **Favorite Articles** and **Recent Articles** lists aren't included in your knowledge base by default, but you can choose where to add them. Both lists require individual reader logins to work.

Here's an example of what they'd look like added to your homepage, with the corresponding text strings numbered, when the lists contain nothing:



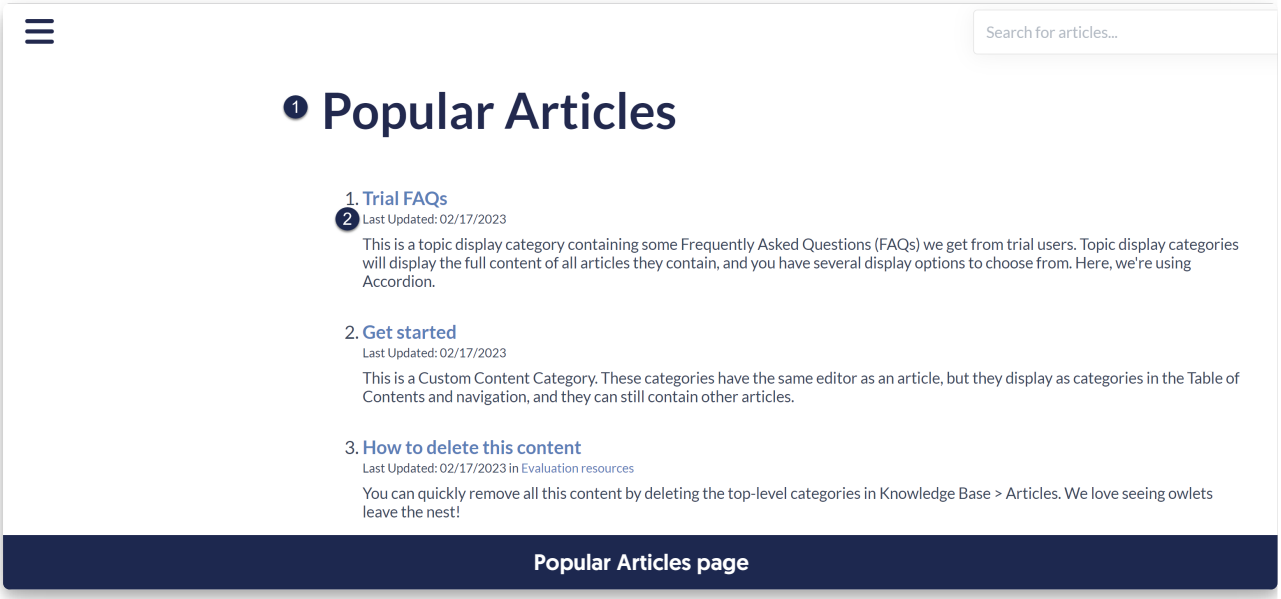
Optional Article Lists, empty

Readers can favorite up to 50 articles; the list displays only up to 10. If the reader's favorited more than 10 articles, a See more link is displayed:

Favorite Articles list, populated

Popular Articles screenshot

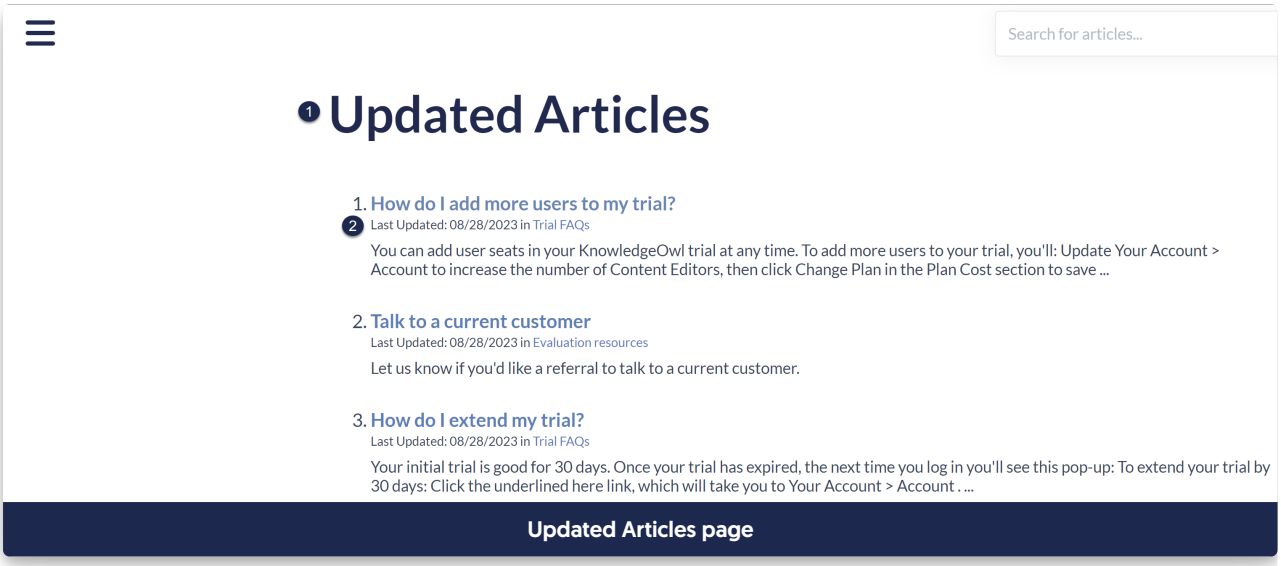
Once you click the "See more..." link in the Popular Articles list (or navigate to /{root}/popular-articles in your knowledge base), you're presented with the full Popular Articles page:



Popular Articles page

Updated Articles screenshot

Once you click the "See more..." link in the Updated Articles list (or navigate to /{root}/updated-articles in your knowledge base), you're presented with the full Updated Articles page:



Updated Articles page

To change the "in" used between the date and the category breadcrumb, update the "in" default text string in the Search section.

New Articles screenshot

Once you click the "See more..." link in the New Articles list (or navigate to /{root}/new-articles in your knowledge base), you're presented with the full New Articles page:



New Articles page

To change the "in" used between the date and the category breadcrumb, update the "in" default text string in the Search section.

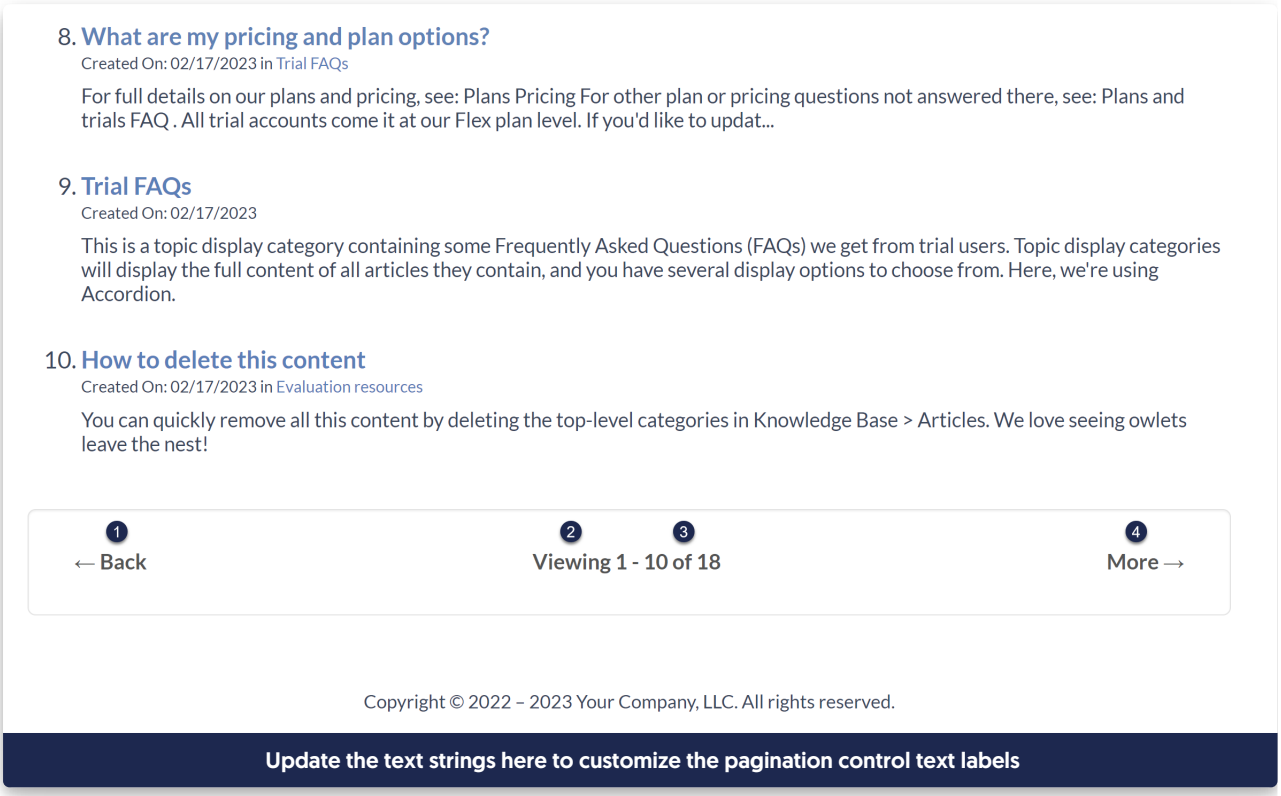
Favorite Articles screenshot

Once you click the "See more..." link in the Favorite Articles list (or navigate to /{root}/favorite-articles in your knowledge base), you're presented with the full Favorite Articles page:

Favorite Articles page

Article List Pagination screenshot

The full page for the Popular, Updated, or New Articles pages displays pagination controls at the bottom if there are more than 10 articles on the page. The text strings here allow you to customize the text associated with those controls.



Section breakdown: Contact Form

Last Modified on 05/29/2024 5:28 pm EDT

Contact Form text customizations are only necessary if the Contact Form is being used.

The Contact Form basically has three main pages:

- **The initial search page**: this page prompts the viewer to search for something
- **A search results page**: their initial question or phrase is searched and we return potentially useful articles. They select whether the article there answered their question. If they say it did answer their question, they're kicked to a confirmed self-serve success page and finish the form. If they say it did not answer their question, they move to the full form.
- **The full contact form**: Once someone has navigated through the first two pages and confirmed that none of the suggested resources answered their question, they're presented with the full contact form. Submitting this form will trigger an email (or whatever method of contact form submission you've selected!) and will then present a confirmed submission page.



These text strings will update the Contact Form in the full knowledge base only. If you're using the Contextual Help Widget (2.0), update that text in **Settings > Widget**. (Text in Modern & Legacy Contextual Help Widget (deprecated) will not be updated).

Here's a full list of the Default Text Strings available in the Customize Text Contact Form Knowledge Base Section, with accompanying screenshots to show how they're used:

Default Text String	Description	Additional notes/description	Screenshot References
Contact Form	Contact form page title tag	The title tag is what's used as the label for the browser tab. It's displayed throughout the contact form interaction, but only shown in one screenshot here.	Initial search screenshot, #1
How can we help?	Contact form introduction header text	The header displayed when someone first opens the contact form.	Initial search screenshot, #2
We need just a bit more information before you submit your question.	Contact form header		Full contact form screenshots, #1
Do any of these articles answer your question?	Contact form search header		Search results page screenshot, #1
Next	Contact form search submit button text	The Next button is displayed when someone first opens the Contact Form. They select this once they've entered their initial question/search.	Initial search screenshot, #5

Default Text String	Description	Additional notes/description	Screenshot References
Yes! That Helped!	Contact form search confirmed self-serve button text	This button is displayed once someone completes the initial search in the Contact Form, when we suggest resources based on that search. If they click this button, it gets marked as a confirmed self-serve and they're taken to a success page that uses the Self-serve confirmation header as the header.	Search results page screenshot, #2
No, submit my request	Contact form search submit ticket button text	This button is displayed once someone completes the initial search in the Contact Form, when we suggest resources based on that search. If they click this button, they're taken to the full Contact Form so they can submit a query.	Search results page screenshot, #3
Awesome!	Self-serve confirmation header	If someone selects the "Yes! That Helped!" button, this is the header of the page that gets displayed. The body of the text displayed below this header can be edited in **Knowledge Base > Contact Form** in the **Successful Search Body** field.	Confirmed self-serve screenshot, #1
Where should this ticket go?	Multiple email label	If the Contact Form is set up to send via email and the option to send to multiple email addresses is selected, this is label is displayed above the dropdown for the reader to select where to send it.	Full contact form screenshots, #11
Subject	Contact form subject label	This label is placed above the question field on the first page, and gets carried through as the "Subject" if they proceed with submitting to the full Contact Form.	Initial search screenshot, #3 Full contact form screenshots, #2

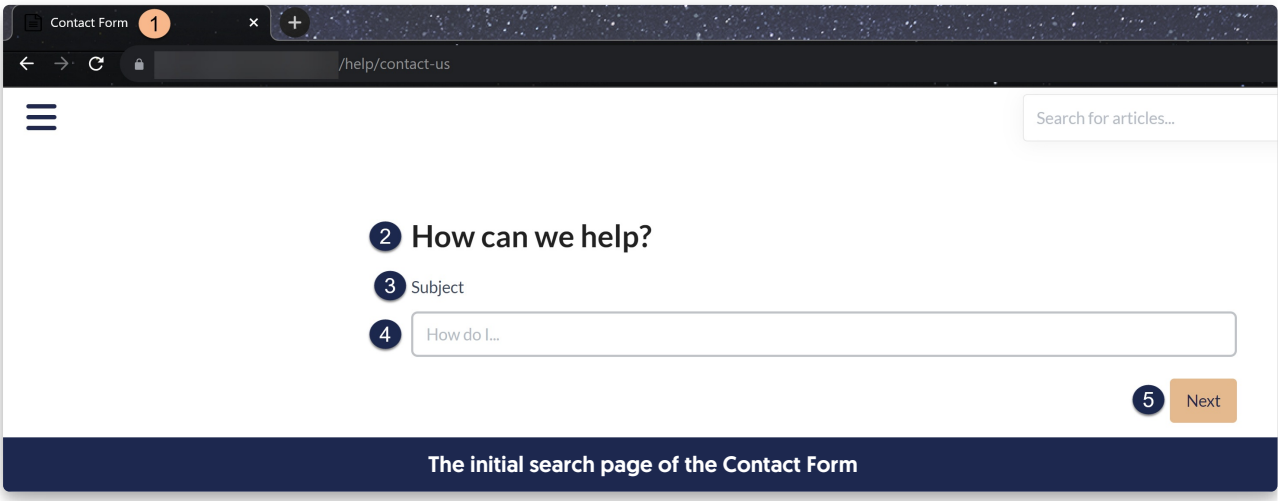
Default Text String	Description	Additional notes/description	Screenshot References
How do I...	Contact form subject placeholder	This placeholder is displayed in the search bar when the Contact Form is first loaded. If someone goes to submit the full form and deletes all of the text they previously entered in the Subject field, this placeholder will display again in the full form.	Initial search screenshot, #4
Details	Contact form details label	This is the label for the body or details section of the full contact form. It's only displayed if someone selects "No, submit my request	Full contact form screenshots, #3
Your Name	Contact form full name label	This label displays above the name field in the full contact form.	Full contact form screenshots, #4
John Doe	Contact form full name placeholder	This placeholder is displayed in the name field in the full contact form. If readers are logged in, the name associated with their account is pre-populated and they won't see this placeholder.	Full contact form screenshots, #5
Your Email Address	Contact form email address label	This label displays above the email field in the full contact form.	Full contact form screenshots, #6
john@doe.com	Contact form email address placeholder	This placeholder is displayed in the email field in the full contact form. If readers are logged in, the email associated with their account is pre-populated and they won't see this placeholder.	Full contact form screenshots, #7
Attach Files	Contact form file attachments label	This label appears above the file picker in the full contact form.	Full contact form screenshots, #8
Submit	Contact form feedback submit button label	This button is what readers click to submit the full contact form.	Full contact form screenshots, #10
Back	Contact form feedback cancel button label	This button allows readers to back out of the full contact form to return the search results page.	Full contact form screenshots, #9

Default Text String	Description	Additional notes/description	Screenshot References
Awesome!	Contact form submitted confirmation header	Once someone submits the full contact form, this is the header of the page that gets displayed. The body of the text displayed below this header can be edited in **Knowledge Base > Contact Form** in the **Form Submitted Body** field.	Submission confirmation page screenshot, #1

To customize the wording for the "Contact Us" link your top navigation, go to Knowledge Base Section: Top Navigation. See Section breakdown: Top Navigation for more information.

Initial search screenshot

The Initial search page is displayed when someone first opens the Contact Form, and contains a streamlined set of fields:



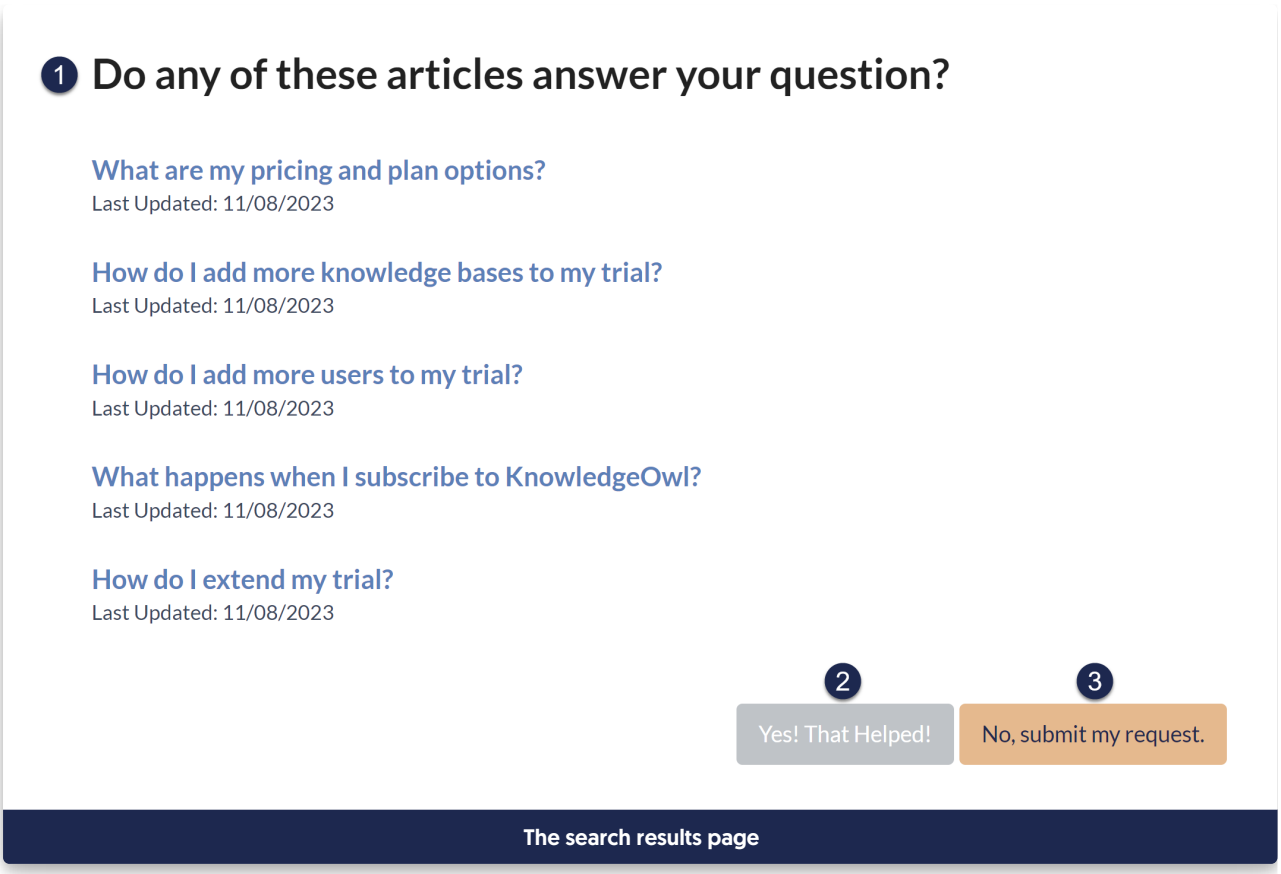
The initial search page of the Contact Form

Once the reader clicks the "Next" button, a search is performed and they're taken to the search results page.

Search results page screenshot

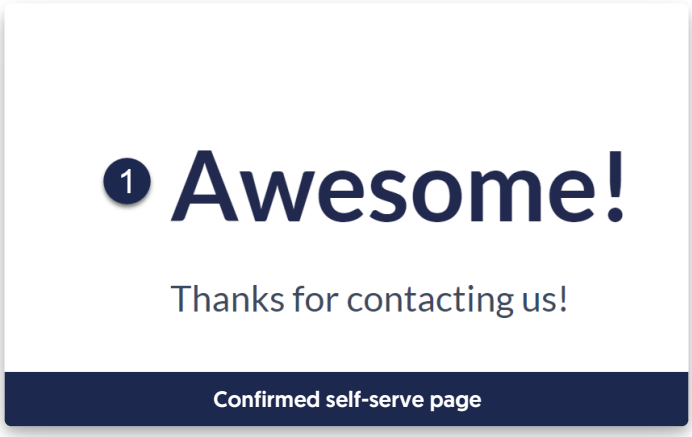
Once a reader clicks Next on the initial search page, we'll perform a search for relevant articles. The reader will be taken to an intermediate Search results page to see if we can encourage them to self-serve with a relevant resource.

They use the two buttons at the bottom to either confirm that their question has been answered (Yes! That Helped!) or to confirm that their question hasn't been answered and they need to go to the full contact form (No, submit my request.):



Confirmed self-serve screenshot

If the reader selects "Yes! That Helped!" from the search results, they'll exit the contact form and be taken to a confirmation page. This will log their search as a self-serve in Contact form reporting.

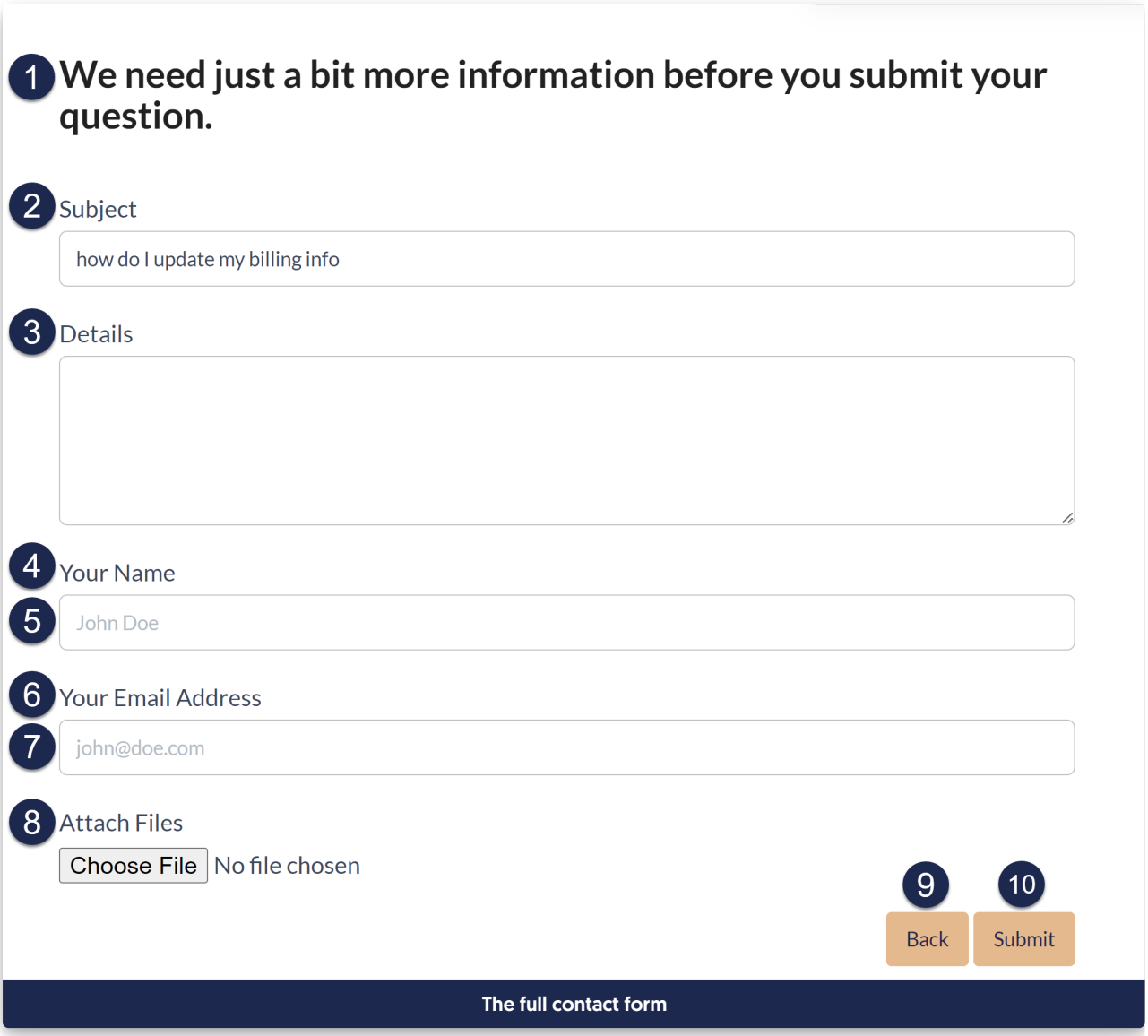


The "Awesome!" header is the only text on this page you can edit in Tools > Customize Text. The "Thanks for contacting us!" message can be edited in Knowledge Base > Contact Form by updating the Successful Search Body field.

Full contact form screenshots

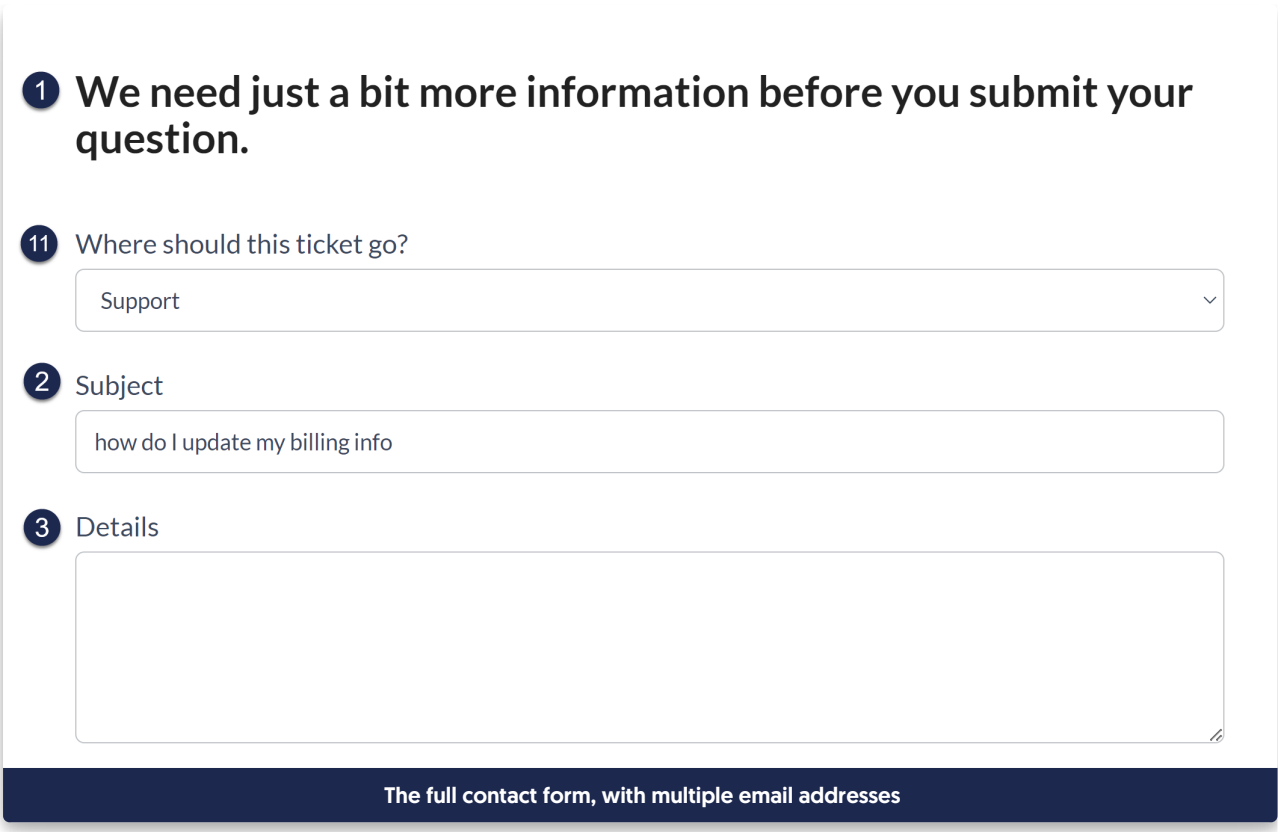
If the reader clicks the "No, submit my request" button on the search results page, they'll be taken to the full contact form. Once they fill out the details here and select "Submit", the contact form submission will be

delivered to you through whatever method you've selected in your configuration.



The full contact form

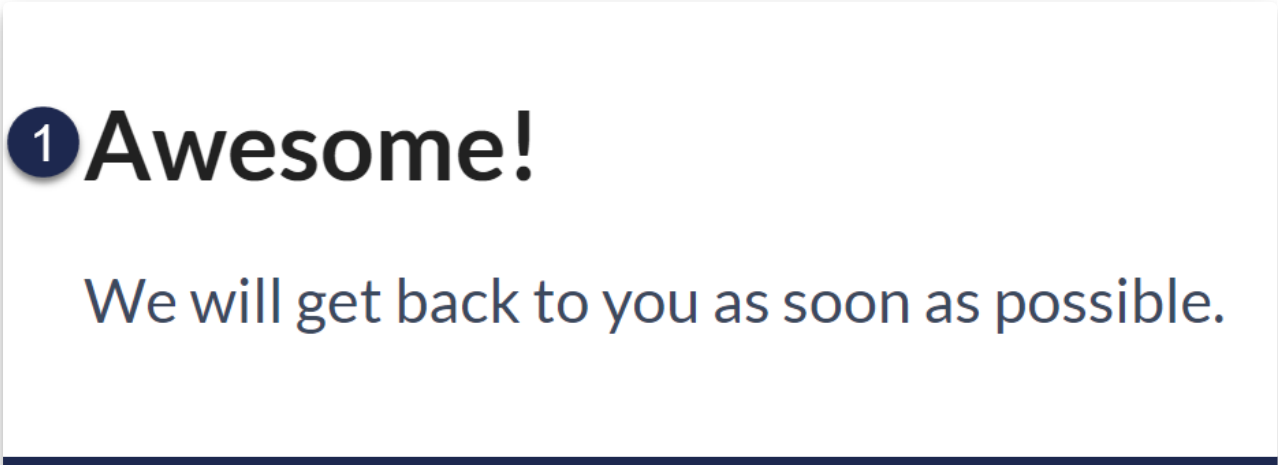
If the contact form has been set up to use multiple email addresses, that field will display between the full contact form header and the Subject:



The full contact form, with multiple email addresses

Submission confirmation page screenshot

Once a reader selects the "Submit" button from the full contact form, they're presented with a submission confirmation page:



The submission confirmation page

The "Awesome!" header is the only text on this page you can edit in Tools > Customize Text. The "We will get back to you as soon as possible" message can be edited in Knowledge Base > Contact Form by updating the Form Submitted Body field.

Update Style Settings with Customize Text merge code

Last Modified on 08/21/2024 11:47 am EDT

In some cases, when you edit a text string in the Customize Text tool, you'll see a warning that says you need to update your knowledge base theme and/or your homepage:



The warning appears because we used to hard-code these text strings into the Custom HTML templates used in **Settings > Style** (and top-level **Homepage**), before the Customize Text merge codes existed. It will take a little bit of sleuthing to update the text accordingly. If you're unsure what to update, contact us and one of our support owls will happily help you!

This warning message can be displayed for these knowledge base sections' text strings:

- Article: Last Modified on
- Article: Related Articles
- Top Navigation: Toggle navigation
- Top Navigation: Table of Contents
- Article Lists: Popular articles list heading
- Article Lists: Updated articles list heading
- Article Lists: New articles list heading
- Article Lists: Recent articles list heading
- Article Lists: Favorite articles list heading

Article list location
For the article list headings, older knowledge bases may have these lists in **Homepage**. If you don't see the list in **Settings > Style**, follow the instructions in Update Homepage with Customize Text merge code.

Here's an overview of what you'll need to do if you see this warning:

1. Select the **knowledge base theme** link or navigate to **Settings > Style**.
2. Open the appropriate Custom HTML template (Article or Top Navigation).
3. Find the previously hard-coded text and replace it with a new merge code.
4. **Save** your changes.

We have more detailed instructions for each scenario below!

Article: Last Modified on

If you try to edit the default text string for Last Modified on in the Article section and receive the warning:

1. Select the **knowledge base theme** link in the warning or navigate to **Settings > Style**.
2. In the **Customize HTML, CSS, and JS section**, select **Custom HTML**.
3. Select **Article** from the **Select HTML section to edit** dropdown.
4. Identify the text that needs to be replaced. The Last modified on statement is usually near the top, in the `<div class="metadata">` section, which begins on row 4. Here, we see it in row 4:

```
<div class="hg-article">
  <div class="hg-article-header">
    <h1 class="hg-article-title">[article("title")][article("action_icons")]</h1>
    <div class="metadata">Last Modified on [article("date_modified")] by [author("name")]</div>
  </div>
  <div class="hg-article-body">
    [article("body")]
```

5. Put your cursor at the start of the text you'd like to replace.
6. Copy the merge code below and paste it in there:

```

```

7. Delete the original "Last modified on" text.
8. Your code should now look something like this:

```
<div class="hg-article">
  <div class="hg-article-header">
    <h1 class="hg-article-title">[article("title")][article("action_icons")]</h1>
    <div class="metadata"> [article("date_modified")] by [author("name")]</div>
  </div>
  <div class="hg-article-body">
    [article("body")]
```

9. You can **Preview** your changes (be sure you select **Article** from the preview dropdown to see the correct page!).
10. Be sure to **Save** your changes when you're done.



Individual article PDFs

If you use individual article PDFs and you update the **Last Modified on** text string, the article PDFs will update as you save changes to the articles. Contact us to regenerate your individual article PDFs in bulk so they display the new text!

Article: Related Articles

If you try to edit the default text string for Related Articles in the Article section and receive the warning:

1. Select the **knowledge base theme** link in the warning or navigate to **Settings > Style**.
2. Below the preview pane, be sure **Custom HTML** is selected.
3. Select **Article** from the Custom HTML dropdown.
4. Identify the text that needs to be replaced. The Related Articles heading usually appears near the bottom, in the `<div class="hg-article-footer">` within an h3. Here, we see it in row 6:

```
<div class="hg-article-body">
  [article("body")]
</div>
<div class="hg-article-footer">
  <div class="ko-related-articles text-center">
    <h3>Related Articles</h3>
    [template("related")]
```

5. Put your cursor at the start of the text you'd like to replace.
6. Copy the merge code below and paste it in there:

```
```

7. Now delete the original heading. Your Custom HTML should now look something like this:

```
<div class="hg-article-body">
  [article("body")]
</div>
<div class="hg-article-footer">
  <div class="ko-related-articles text-center">
    <h3></h3>
    [template("related")]
```

8. You can **Preview** your changes (be sure you select **Article** from the preview dropdown to see the correct page!).
9. Be sure to **Save** your changes when you're done.

Top Navigation: Toggle navigation

If you try to edit the text string for Toggle navigation in the Top Navigation section and receive the warning:

1. Select the **knowledge base theme** link in the warning or navigate to **Settings > Style**.
2. Below the preview pane, be sure **Custom HTML** is selected.
3. Select **Top Navigation** from the Custom HTML dropdown.

4. **Identify the text that needs to be replaced. The Toggle navigation text is usually about halfway down the pane below a slideout-right-toggle template. Here, it's in row 3:**

```
[template("slideout-right-toggle")]
<button type="button" class="navbar-toggle" data-toggle="collapse" data-target=".navbar-collapse">
   <span class="sr-only">Toggle navigation</span>
   <span class="icon-bar"></span>
   <span class="icon-bar"></span>
   <span class="icon-bar"></span>
</button>
```

5. **Put your cursor before the "T" in "Toggle navigation".**

6. **Copy the merge code below and paste it in.**

```

```

7. **Delete the original "Toggle navigation" text. Your Custom HTML should now look something like this:**

```
[template("slideout-right-toggle")]
<button type="button" class="navbar-toggle" data-toggle="collapse" data-target=".navbar-collapse">
   <span class="sr-only"></span>
   <span class="icon-bar"></span>
   <span class="icon-bar"></span>
   <span class="icon-bar"></span>
</button>
```

8. **Be sure to Save your changes when you're done.**

Top Navigation: Table of contents

If you try to edit the text string for Table of in the Top Navigation section and receive the warning:

1. **Select the knowledge base theme link in the warning or navigate to Settings > Style.**

2. **Below the preview pane, be sure Custom HTML is selected.**

3. **Select Top Navigation from the Custom HTML dropdown.**

4. **Identify the text that needs to be replaced. The Table of Contents text actually involves TWO sections of text you'll need to replace. Both are fairly close to the top of the Top Navigation, under the button with target=".documentation-categories":**
   `<span class="sr-only">Table of Contents</span>` **and** `<span class="browse">Table of Contents</span>`**. Here, they're in rows 6-7:**

```
<h1 class="hg-project-name">[template("project-name")]</h1>
<div class="nav-left-searchbar hidden-xs">
   [template("searchbar")]
</div>
<button type="button" class="navbar-toggle toc-toggle pull-left clear-left" data-toggle="collapse" data-target=
   <span class="sr-only">Table of Contents</span>
   <span class="browse">Table of Contents</span>
```

5. Put your cursor before the "T" in the "Table of Contents" text.
6. Copy the merge code below and paste it in:

```
```

7. Delete the "Table of contents" text.
8. Repeat steps 5-7 for the second Table of Contents text span.
9. Your Custom HTML should now look something like this:

```
<h1 class="hg-project-name">[template("project-name")]</h1>
<div class="nav-left-searchbar hidden-xs">
   [template("searchbar")]
</div>
<button type="button" class="navbar-toggle toc-toggle pull-left clear-left" data-toggle="collapse" data-target=
   <span class="sr-only"></span>
   <span class="browse"></span>
```

10. Be sure to **Save** your changes when you're done.

Article Lists: Any list heading

If you try to edit the default text string for any of the article list headings (New, Popular, Updated, Recent, Favorites) and receive the warning:

1. Select the **knowledge base theme** link in the warning or navigate to **Settings > Style**.
2. Below the preview pane, be sure **Custom HTML** is selected.
3. Select **Homepage** from the Custom HTML dropdown.
4. Identify the text that needs to be replaced. The Popular Articles, New Articles, and Updated Articles headings usually appear near the bottom, in the div class="homepage-widgets row" within an h3, in rows 10-12 below:

```
<div class="ko-homepage-top">
  <h1 class="hg-article-title xcolor">[homepage("title")]</h1>
  [template("large-search")]
</div>
<div class="hg-article">
  <div class="hg-article-body">
    <div>[template("icon-cats,max=8,col=4,desc=0")]</div>
    <div>[homepage("body")]</div>
    <div class="homepage-widgets row">
      <div class="col-md-4 col-sm-6"><h3>Popular Articles</h3>[template("pop-articles")]</div>
      <div class="col-md-4 col-sm-6"><h3>New Articles</h3>[template("new-articles")]</div>
      <div class="col-md-4 col-sm-6"><h3>Updated Articles</h3>[template("up-articles")]</div>
    </div>
  </div>
</div>
```

Recent Articles and Favorites Articles lists need to be added manually, so you may need to look around a bit for them!

5. **Put your cursor at the start of the text you'd like to replace.**
6. **Copy the appropriate merge code below and paste it in:**
   a. **Popular articles list heading:**

   ```
   [translation("article-lists:popular-articles")]
   ```

   b. **New articles list heading:**

   ```
   [translation("article-lists:new-articles")]
   ```

   c. **Updated articles list heading:**

   ```
   [translation("article-lists:updated-articles")]
   ```

   d. **Recent articles list heading:**

   ```
   [translation("article-lists:recent-articles")]
   ```

   e. **Favorite articles list heading:**

   ```
   [translation("article-lists:favorite-articles")]
   ```

7. **Delete the original text. Here's a sample of what Custom HTML might look like if we replaced all three of the article lists with the merge codes:**

```
<div class="ko-homepage-top">
   <h1 class="hg-article-title xcolor">[homepage("title")]</h1>
   [template("large-search")]
</div>
<div class="hg-article">
   <div class="hg-article-body">
      <div>[template("icon-cats,max=8,col=4,desc=0")]</div>
      <div>[homepage("body")]</div>
      <div class="homepage-widgets row">
         <div class="col-md-4 col-sm-6"><h3></h3>[template("pop-articles")]</div>
         <div class="col-md-4 col-sm-6"><h3></h3>[template("new-articles")]</div>
         <div class="col-md-4 col-sm-6"><h3></h3>[template("up-articles")]</div>
      </div>
   </div>
</div>
```

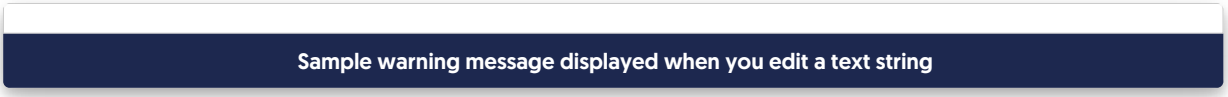
8. **You can Preview your changes.**

9. **Be sure to Save your changes when you're done.**

Update Homepage with Customize Text merge code

Last Modified on 07/17/2024 11:43 am EDT

In some cases, when you edit a text string in the Customize Text tool, you'll see a warning that says you need to update your knowledge base theme:



Sample warning message displayed when you edit a text string

The warning appears because we used to hard-code these text strings into either the top-level **Homepage** content editor (for knowledge bases created before October 2022) or the Custom HTML templates used in **Settings** > **Style** before the Customize Text merge codes existed.

It will take a little bit of sleuthing to update the text accordingly. If you're unsure what to update, contact us and one of our support owls will happily help you!

This warning message can be displayed for these knowledge base sections' text strings:

- Article Lists: Popular articles list heading
- Article Lists: Updated articles list heading
- Article Lists: New articles list heading
- Article Lists: Recent articles list heading
- Article Lists: Favorite articles list heading

Here's an overview of what you'll need to do if you see this warning:

1. Figure out where the article lists are stored. Select the **homepage** link to navigate to **Homepage** and check for the lists there first. (Knowledge bases created before October 2022 often have this setup.) If you see the article list you want to edit here, keep using these instructions!
    a. If you don't see the lists there, they're likely in **Settings** > **Style**. Follow the instructions in Update Style Settings with Customize Text merge code instead.
2. Find the previously hard-coded text and replace it with a new merge code.
3. **Save** your changes.

Since the steps are fairly similar for all three article lists, we'll walk through how to update one list as an example:

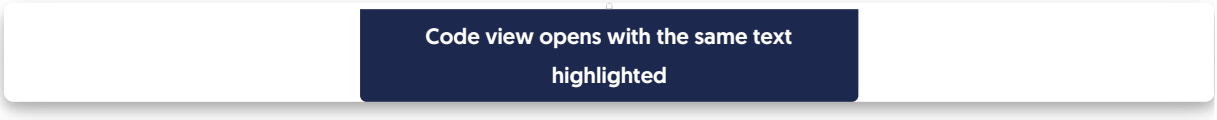
Article Lists in Homepage

If you try to edit the default text string for the New, Popular, Updated, Recent, or Favorites Articles list headings and receive the warning:

1. Select the **homepage** link in the warning or navigate to **Homepage**.
2. In the **Homepage content** pane, look for the list title you want to update. Here, we'll update the Popular Articles list.
3. Highlight part or all of the text you want to update.



4. Select the </> icon in the editor controls to toggle to code view.
5. With the text highlighted, the code editor will open with that same text highlighted. ☺



6. Delete that text.
7. Copy the appropriate merge code from below and paste it in where the text was. Be sure you keep any <h3></h3> or other tags that were already there.
    a. Popular articles list heading:

```
[translation("article-lists:popular-articles")]
```

    b. New articles list heading:

```
[translation("article-lists:new-articles")]
```

    c. Updated articles list heading:

```
[translation("article-lists:updated-articles")]
```

    d. Recent articles list heading:

```
[translation("article-lists:recent-articles")]
```

    e. Favorite articles list heading:

```
[translation("article-lists:favorite-articles")]
```

8. Your code view should now look something like this:

```
<div>[template("base-cats")]</div>
<div class="homepage-widgets">
   <div class="col-md-4 col-sm-6">

      <h3></h3>[template("pop-articles")]</div>
   <div class="col-md-4 col-sm-6">
```

9. And if you toggle back to the regular editor, you'll see the title replaced with the merge code you added:



Sample editor with the customize text merge code used

10. Be sure to **Save** your changes.

At this point, any updates to **Tools** > **Customize Text** for the article list heading should properly show in your knowledge base!

Advanced Search overview

Last Modified on 12/05/2024 2:05 pm EST

When you run a search in your live knowledge base, in **Manage**, or using the **Search for articles...** option in the top navigation, you run a text search. This is great for situations where you have a distinct phrase or word that appears in the text to search for.

But you may also want to run searches for:

- Specific URLs
- Specific HTML (such as color hexes or rgb values, certain classes, etc.)
- Some underlying HTML elements, like iframes

In these cases, you really want to search the underlying HTML of your articles, not the text.

And these cases are exactly what we built **Tools > Advanced Search** for!

Here, you can search for an exact text string or use regex to find combinations of values.

Once you search, we'll search your articles in batches and generate a CSV export of all the articles we found that matched your search phrase.

See the options below to dig into this report in more detail.

Run an Advanced Search

Last Modified on 05/29/2024 5:28 pm EDT

To run an Advanced Search:

1. Go to **Tools > Advanced Search.**
2. Select your **Search type**:
    - Exact matches: good when you can enter the exact value or string you are looking for. This search is case sensitive.
    - Regex pattern: good when you are trying to find variations on a string. This search is case insensitive.
3. Enter your **Search Text**. For an Exact match, this should be the exact string you are looking for. For regex, use regex patterns and escape special characters like / with a \ in front of them.
4. By default, Advanced Search will search all articles with a Published or Needs Review status only. You can use the **Additional content options** to include draft or archived articles by checking the boxes next to them.
5. Once you've finished your selections, select **Search Knowledge Base** to run the advanced search.
6. A progress bar and article count will appear at the top of the page. While this advanced search is running, no one can run an additional advanced search.
7. Once the search is complete, you'll see a confirmation message. The Last search ran on data and Text searched for will update, and you can select the **Download** button to download a CSV export of the articles we found that matched your search terms.

Advanced Search exact match

Last Modified on 08/07/2024 4:56 pm EDT

The exact match is generally the best place to begin learning Advanced Search.

The exact match will look for an exact, case-sensitive word or phrase in your knowledge base.

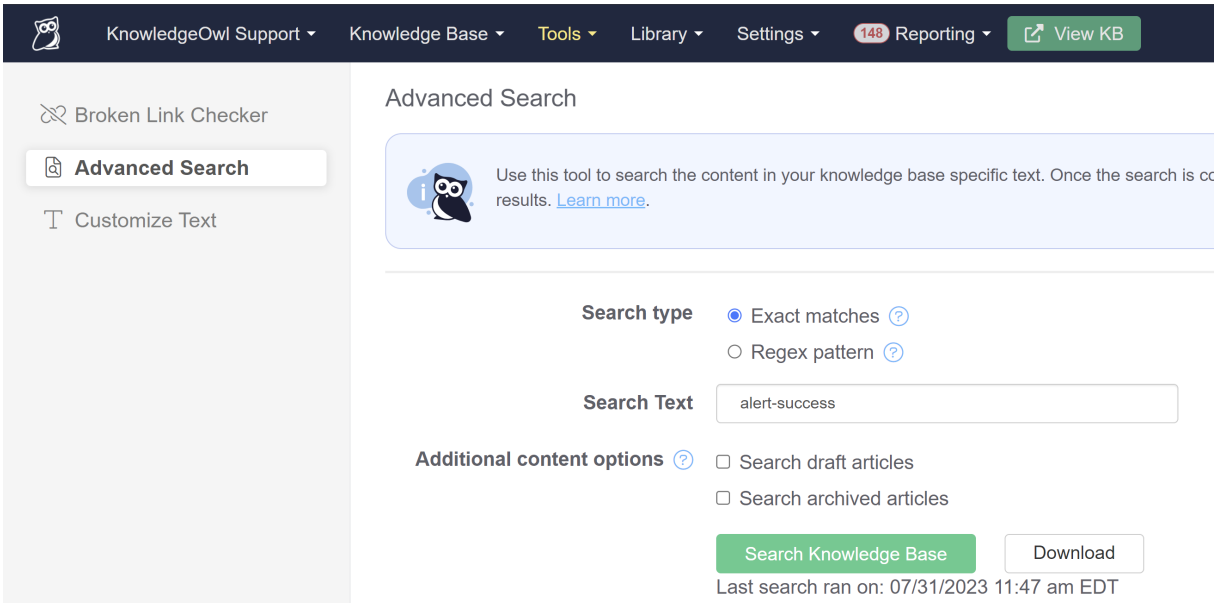
You can add things like:

- **Link to Article references:** Link to Article references get inserted as [[hg-id:*articleid*]]. Search for hg-id:*id* to find all articles that link to a given article.
  - **Example:** `hg-id:632b7cdc027d150f97264dfe`
- **Topic article references:** topic article references get inserted as [[ko-topic:*id*]]. You can run an exact match search for the ko-topic:*id* portion to find all places a topic article has been embedded.
  - **Example:** `ko-topic:632b7cdc027d150f97264dfe`
- **Snippet merge code references:** you can do a search for snippet.*mergeCode* to find all articles referencing a given snippet (though snippet references are usually a faster way to do this one!)
  - **Example:** `snippet.contactUs`
- **Exact URLs** referenced as hyperlinks in your articles.
  - **Example:** `https://calendly.com/knowledgeowl-support`
- **Words** that appear in the text of articles.
  - **Example:** `Advanced Search` **(or** `advanced search` **depending on case!)**
- **Non-image files:** When you add a non-image file like a PDF, Excel spreadsheet, or Word document to an article (not embedded, but just the link to it), the link gets added with class="fr-file". So if you're trying to find all articles that have a file uploaded to them, you can run a search for this class.
  - **Example:** `fr-file`
- **Raw HTML** like classes, hex codes, or rgb values.
  - **Example: search for the** `alert-success` **class**
  - **Example: search for a color used, like** `rgb(29, 40, 79)` **or** `#1d284f`
- **Manually-inserted glossary terms:** when you use the editor control to **Add Glossary Term**, this creates some underlying HTML that we can search, either to find all articles with manually inserted glossary terms, or with a specific manually-inserted glossary term
  - **Example: find all articles with a manually-inserted glossary term by searching for the ko-glossary-term class:** `ko-glossary-term`
  - **Example: find all articles with a specific manually-inserted glossary term:** `data-glossaryid="5ad52bc9ad121c0453099161"` **. (You'll need to know the ID of the glossary term--you can grab this by manually inserting it into an article and toggling to Code View!)**

Tips on using this type of search

- Since the search is case sensitive, be sure you're using values exactly as they appear in your knowledge base
- Since this is an exact match, you do not need to escape special characters in any way: put them in exactly how they appear in your content
- To search HTML, you may want to hop into Code View on an article to see exactly what you want to grab. For example, if I want to find every article where I've used an Alert Success div, I can search for the

alert-success class using an exact match:



If you want to run a case-insensitive search or have familiarity with regex searches, see Regex pattern search for more information on running those searches!

Advanced Search regex pattern

Last Modified on 05/29/2024 5:27 pm EDT

If exact match won't get you what you need, the regex pattern should.

Regex is a common abbreviation of 'regular expressions'. Regular expressions are "a sequence of characters that specifies a *search pattern*. Usually such patterns are used by string-searching algorithms for "find" or "find and replace" operations on strings, or for input validation." (from Wikipedia - Regular expression).

Regex can be very powerful, and can look very complicated. Don't panic!

There are basically two ways to use regex in our Advanced Search:

1. To run a case-insensitive search
2. To do a full regex pattern

For many of our authors, the case-insensitive search is all the further you'll need to go, so let's start there!

Regex for case insensitive search

For individual words or phrases that do not contain any punctuation, you can largely just run the regex pattern exactly as you would an exact match search.

If the word or phrase contains punctuation, though, you'll need to escape those characters by putting a "\" in front of them. This includes the following punctuation:

- Forward slash: /
- Plus sign: +
- Asterisk: *
- Question mark: ?
- Square brackets, opening or closing: [or]
- Parentheses, opening or closing: (or)
- Curly brackets, opening or closing: { or }
- Dollar sign: $
- Caret: ^
- Equals sign: =
- Exclamation point: !
- Greater than and less than symbols: < and >
- Vertical bar/pipe: |

So, for example, if I were adding a URL into the regex pattern search, I would want to add a backslash \ in front of any of any of the forward slashes /: `https://calendly.com/knowledgeowl-support` becomes: `https:\/\/calendly.com\/knowledgeowl-support`

Full regex patterns

Full regex patterns are generally best suited to advanced authors who are somewhat familiar with regex.

To construct your expression, we recommend using a tool like regex101, using the **PCRE2 (PHP >=7.3)** flavor of regex.

Then you can work with regex patterns to find what you're looking for. For more details on working with regex, you can check out:

- W3 Schools PHP Regular Expressions: see the Regular Expression Patterns and Metacharacters sections
- The Quick Reference guide within regex101 (be sure you have the PCRE2 (PHP >=7.3) flavor selected!)

An example:

- "|" means "or" in regex, so you can search for one term or another by separating them with a |. We recommend placing the entire phrase in parentheses, particularly if you're using phrases rather than individual words.
  - Example: Search for articles containing either the word author or reader: `(author|reader)`
- "." acts as a wildcard so you can use it in interesting ways.
  - Example: Search for articles that might contain either Berkshire or Cheshire by matching on shire with a wildcard: `.shire`

Tips on using this type of search

- With regex patterns, it often helps to have an article you know should match the pattern to test against
- If your word or phrase contains punctuation, remember to escape it using a \. See the list above in Regex for case insensitive search for more information.
- Only use this search type if you can't get what you need from an exact match!

Reading the Advanced Search CSV

Last Modified on 05/29/2024 5:28 pm EDT

The Advanced Search CSV export contains 9 columns:

- **Object ID**: This is a unique identifier we use behind the scenes to identify every object in your knowledge base. You can generally ignore this column.
- **Object Type**: Advanced Search will search within articles and custom content categories. This column identifies whether the result returned is from an Article or a Category.
- **Title**: The title of the article or category
- **Edit Link**: A link to jump directly to the article or category within app.knowledgeowl.com
- **View Link**: A link to view the article or category in your live knowledge base
- **Parent Category**: The title of the article or category's immediate parent category. This shows N/A if it is a top-level article or category.
- **Status**: For articles, this displays the Publishing Status. For categories, this will display "active" if the category is active (deleted categories are not searched).
- **Author**: The first and last name of the officially-identified author for the article. This will show as N/A for categories, since they have no listed author.
- **Last Modified Author**: The first and last name of the author who last saved changes to this article or category.

Advanced Search video walkthrough

Last Modified on 05/29/2024 5:27 pm EDT

If you prefer video to text, here's Kate's original Wisdom Wednesday session on working with Advanced Search from August 30th, 2023.

How subscriptions work

Last Modified on 05/29/2024 5:28 pm EDT

If your knowledge base has subscriptions enabled, readers can subscribe to categories to receive email notifications when:

- New articles are added to the category
- Existing articles in the category are updated

Subscription notification emails go out using your own SMTP server, so you can configure the "From" email address and name and guarantee that these emails are seen as coming from a non-spam source.

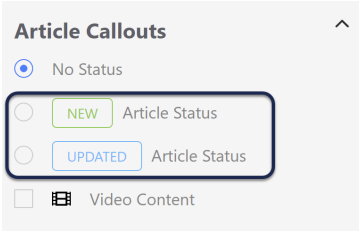
When and how often are subscription notification emails sent?

You can configure your knowledge base to send subscription notification emails on a weekly or daily schedule, at a time of your choice. All subscribed readers will receive notifications at the same time.

Notifications for multiple categories are bundled into a single email, so your readers don't have to worry about getting multiple notification emails every scheduled day.

Which articles are included in a subscription notification?

The power is in your hands. Articles are only included in subscription notifications if they have a New or Updated article callout:



So you can make as many small edits for typos, grammar, etc., without triggering a notification. Once you set the New/Updated callout and save the article, it will be included in the next scheduled notification.

Does a reader need to be logged in to subscribe?

By default, subscriptions are only enabled for logged-in readers. If you have a mixture of public content and restricted content that readers must log in to access, only logged-in readers will see the subscribe button. They'll see that option for all categories of content--public and restricted alike.

If you have a public knowledge base, or a mixture of public and restricted content and you want public readers to be able to subscribe to public categories, you can opt to enable public subscriptions. This will enable the Subscribe button for anyone who visits your knowledge base--logged in or not. If you want to use public subscriptions and you're using your own private domain (such as help.my-amazing-company.com rather than my-amazing-kb.knowledgeowl.com), you'll need to configure reCAPTCHA for these public

subscriptions.

Who controls subscriptions?

Individual readers choose which categories to subscribe or unsubscribe from. Readers can unsubscribe at any time.

Knowledge base administrators choose the email schedule (weekly vs. daily) and time.

The SMTP settings determine the "From" email address and name.

How do readers subscribe to categories?

When subscriptions are enabled, category landing pages have a **Subscribe** button to the right of the category title. Readers can click that to subscribe to the category.

You can also opt to include subscribe buttons in your table of contents.

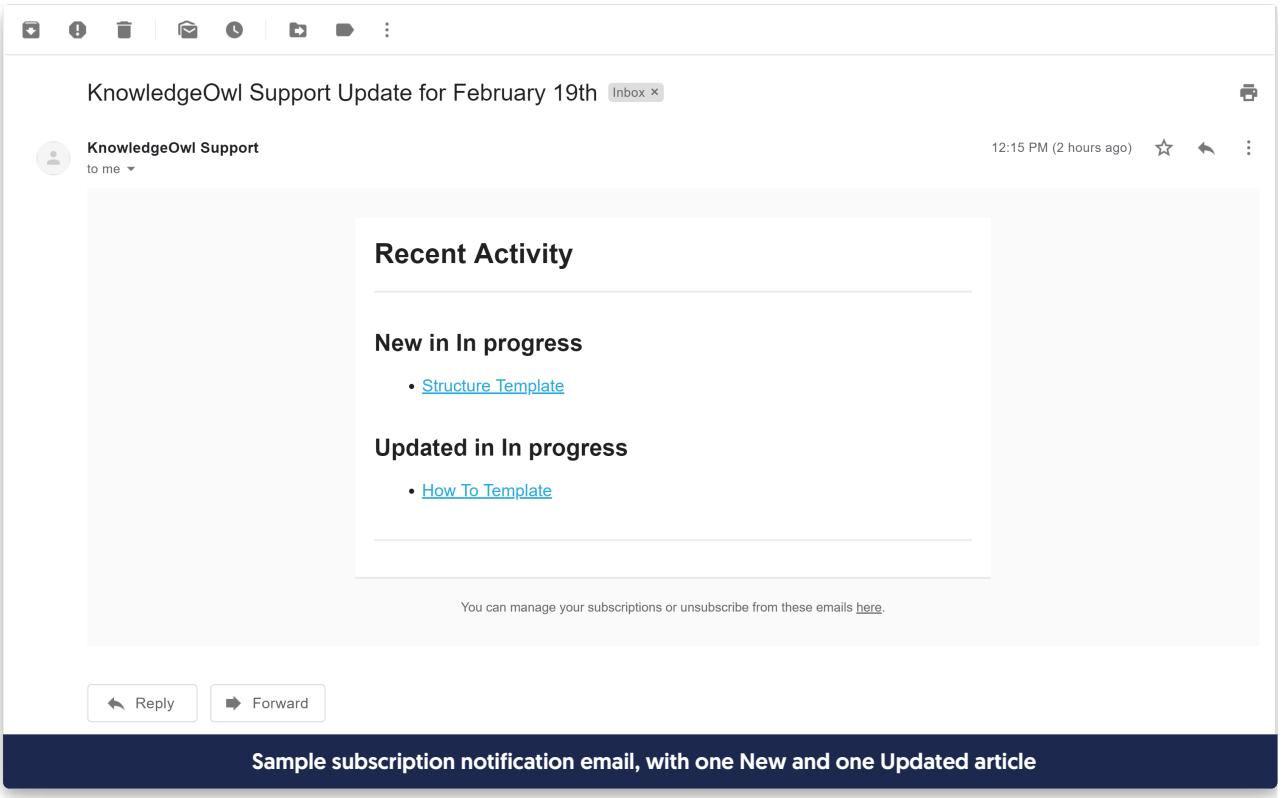
Subscribe buttons will not automatically show up in Custom Content categories. They'll need to be explicitly added.

What do subscription notification emails look like?

By default, the subject line will look like: [[Knowledge Base Name]] Update for [[date]]

So if you subscribe to our KnowledgeOwl Support knowledge base, you'll get email notifications that say: KnowledgeOwl Support Update for February 18th.

For each category with activity, you'll see a list of New articles, followed by a list of Updated articles. Links will take you directly to the articles:



Sample subscription notification email, with one New and one Updated article

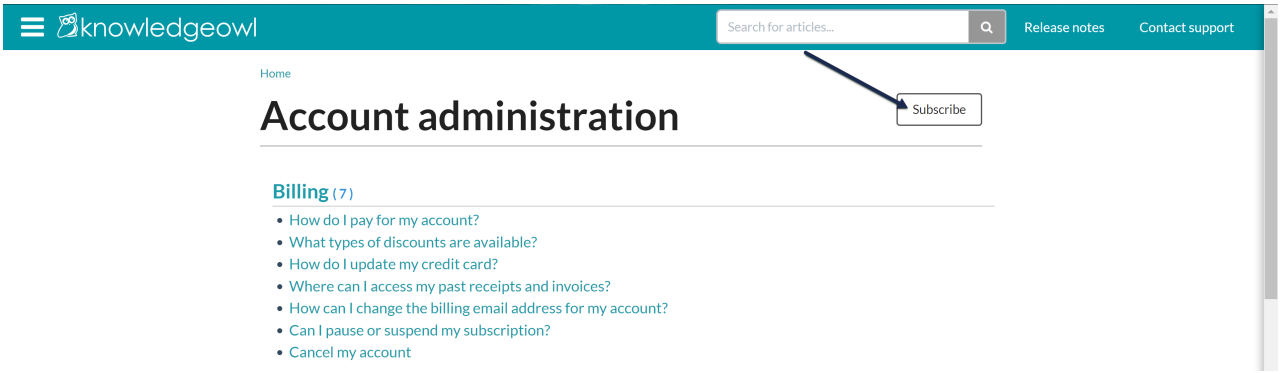
Subscribe to a category

Last Modified on 05/29/2024 5:28 pm EDT

When subscriptions are enabled, you can subscribe to receive email notifications when categories have new or updated articles.

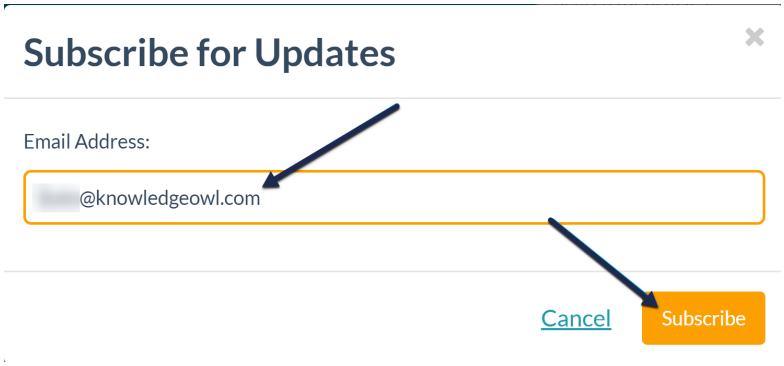
To subscribe, go to the Category landing page.

Click the **Subscribe** button next to the Category title:

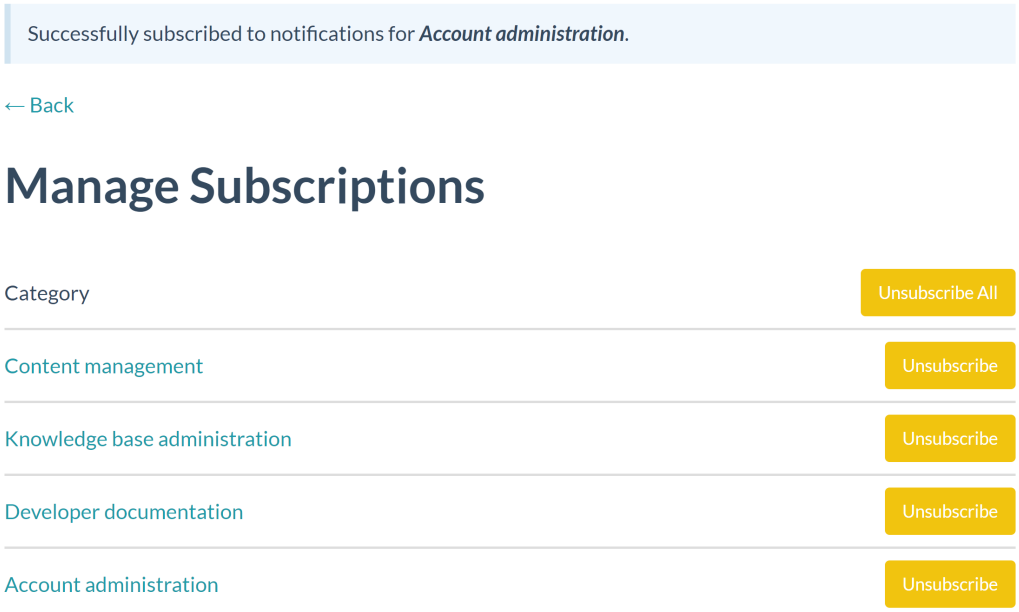


Depending on your site configuration, this will either open a pop-up for you to enter your email address into, or take you directly into your Manage Subscriptions screen.

If the Subscribe for Updates pop-up opens, enter the email address you'd like to subscribe and click the **Subscribe** button:



This will take you to the **Manage Subscriptions** page. You'll see a confirmation across the top showing which category you just subscribed to, as well as a list of all the categories in this knowledge base you're subscribed to.



You can click any of the category links or the Back button to return to the knowledge base content.

How often will I receive notifications for categories I'm subscribed to?

Depending on how your knowledge base is configured, you will either receive updates every day at a set time, or once a week at a set time. Check with your knowledge base administrator to confirm the schedule.

Unsubscribe from a category

Last Modified on 05/29/2024 5:28 pm EDT

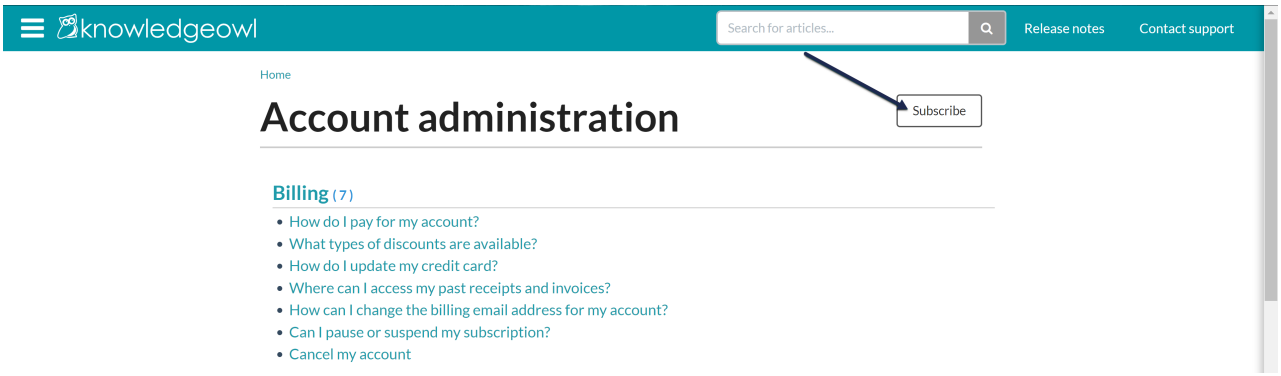
To stop receiving email notifications for a category, you unsubscribe from that category.

You can do this in two ways:

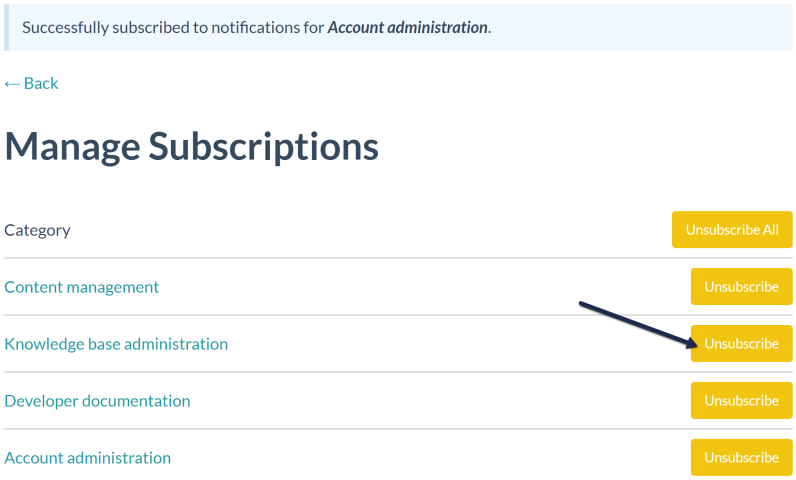
1. From within the knowledge base, by clicking the Unsubscribe button next to the category's name.
2. From any subscription email, click the link at the footer to manage your subscriptions.

Unsubscribe from within the knowledge base

You can click the **Suscribe** button next to any category landing page header to open the **Manage Subscriptions** page.



When the **Manage Subscriptions** page opens, you can either click **Unsubscribe all** to unsubscribe from all categories, or click the **Unsubscribe** button next to the category you don't want to be subscribed to any more. All subscription changes are instantly saved.



Unsubscribe from an email notification

At the bottom of each notification email, you'll see the sentence:

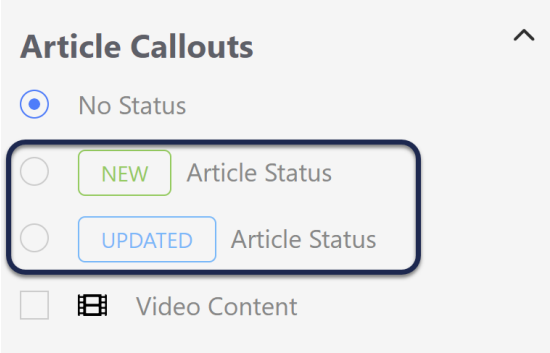
> **You can manage your subscriptions or unsubscribe from these emails here.**

Click the hyperlinked here from any email to open your Manage Subscriptions page.

Trigger/retrigger subscriptions

Last Modified on 05/29/2024 5:28 pm EDT

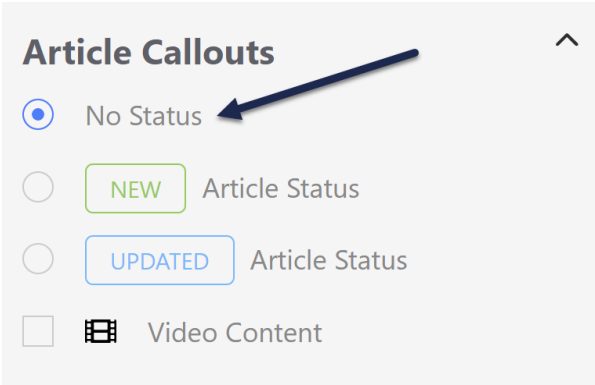
Article saves will trigger a subscription notification email the first time the **New** or **Updated** callout is added to the article:



When an article is saved with one of these article status callouts, we add the article to the subscription queue. The next time your subscription notifications are scheduled to go out, we process that queue and include the article in the email.

If an article has an existing New or Updated callout set and you'd like to retrigger the subscription notification email, you can:

1. Open the article for editing.
2. In the **Article Call Outs** section, select the **No Status** option.



3. Save the article.
4. Now edit the article again to add either the **New** or **Updated** callout.
5. Resave the article.

Saving to No Status basically resets the subscription queue for this article, and then resaving with the New/Updated callout will trigger it anew.

Requirements to enable subscriptions

Last Modified on 09/18/2024 10:55 am EDT

To enable subscriptions, you'll need to:

1. Make sure you have at least one SMTP service configured in your **profile > SMTP**. You must use your own or a third party SMTP server to send subscription emails.
2. Configure the email schedule and subject for notification emails.
3. Update **Settings > Subscriptions** to use the desired SMTP and send a test email to be sure everything's working properly.
4. Edit your subscription settings to enable subscriptions.
5. Enable spam protection for public subscriptions. By default, subscriptions are only enabled for logged-in readers. If you have a fully public or mixed public-and-private knowledge base and you want viewers who aren't logged in to be able to subscribe, enable this option.
    a. Depending on your spam protection settings, you may need to make adjustments in **Settings > Basic**. The page will warn you if there's anything else you need to do.



Look before you leap
You must complete steps 1-4 for subscriptions to work properly. You'll need the SMTP details for your email server before you begin this process.

Configure subscription notification schedule and email subject

Last Modified on 05/29/2024 5:27 pm EDT

To enable subscriptions, you'll configure a global notification schedule and email subject line.

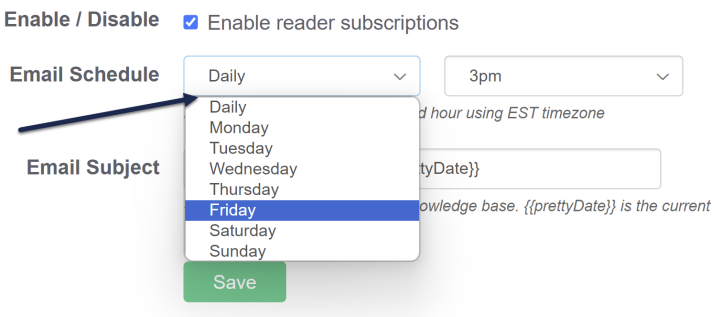
To do so:

1. Go to **Settings** > **Subscriptions**. These settings are all in the **Subscription Settings** section at the top of the page.
2. For the **Email Schedule**, you can choose to send emails on either a Daily basis or on a Weekly basis.

> Regardless of the email schedule you select, subscription notification emails will only be sent if there is New or Updated content to notify subscribers about. See Triggering/retriggering subscriptions for more information.

   a. To send subscription notifications every day, select **Daily** from the dropdown.

   b. To send subscription notifications once a week, select the day of the week you'd like to send the emails from the dropdown.



3. Use the second dropdown to select the time of day you'd like the emails to send. All times used in this schedule are U.S. Eastern timezone.

> Emails generally send between :10 and :15 after the hour that you've selected.

4. The default email subject for notification emails is:

```
Update for
```

The **kbName** mergecode displays your knowledge base name as it appears in **Settings > Basic**. The **prettyDate** merge code displays the date as "Month day" (e.g. February 19th). You can modify the subject however you'd like.

5. Be sure to **Save** once you've made these changes!

Configure SMTP for subscriptions

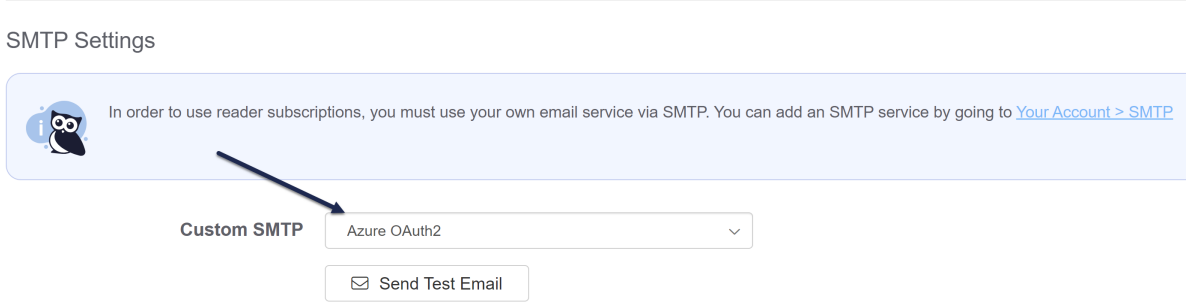
Last Modified on 05/29/2024 5:27 pm EDT

The KnowledgeOwl subscription notification system uses your own or a third-party SMTP email server to send email notifications. Before you enable subscriptions in your knowledge base, you'll need to configure the SMTP settings so that KnowledgeOwl can talk to your SMTP server.

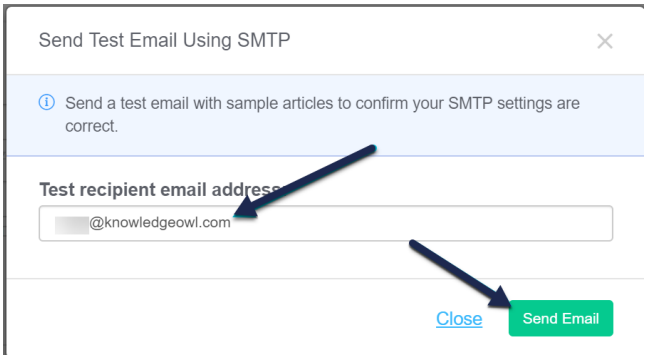
Before you can set up SMTP for your Subscriptions, you must set up an account-wide SMTP service to use. See SMTP for more information!

Once you have at least one SMTP service configured in your account:

1. Go to **Settings > Subscriptions.**
2. In the **SMTP Settings** section, select the SMTP configuration you'd like to use from the **Custom SMTP** dropdown. The dropdown will show the Friendly Names set up for the SMTP services in your account.



3. Click the **Send Test Email** button to send a test Subscription email. This helps to confirm that the SMTP has been properly configured. (And it helps you see a sample of what the emails look like!)
    a. Once you click the button, a pop-up will open where you can enter the email address you'd like to send the test to. For Azure OAuth2 SMTP services, you'll need to send the test to another Azure email.
    b. Enter the test recipient email address and click **Send Email.**



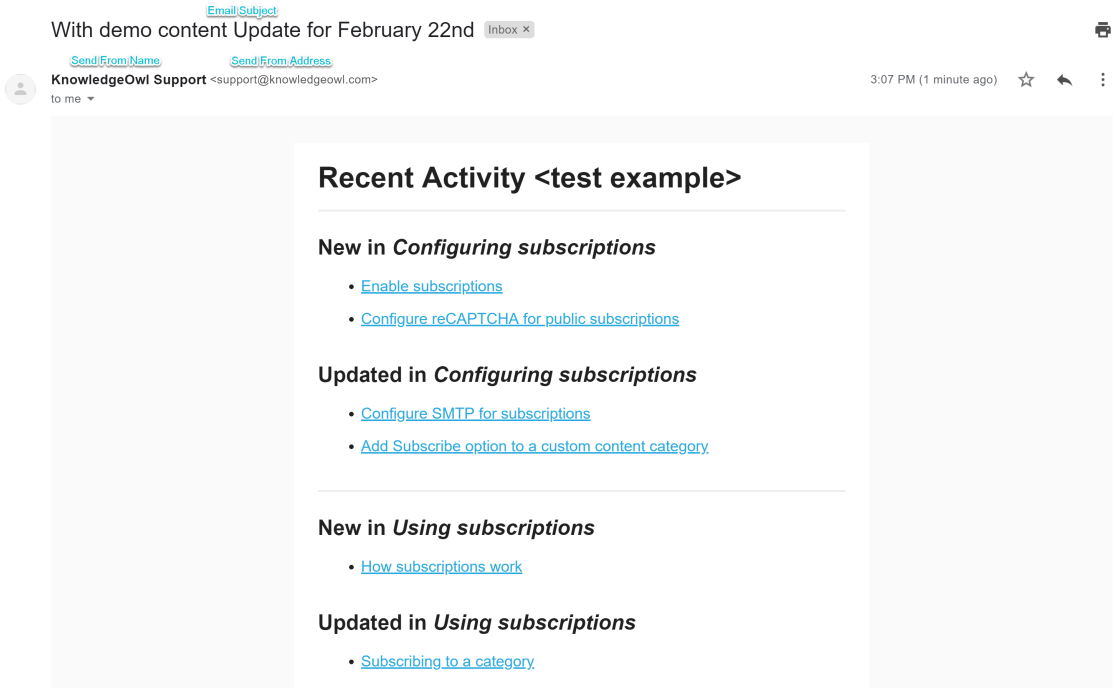
c. If you receive a message that the email failed, this likely means there's something wrong with your SMTP configuration overall. You may need an IT admin to help troubleshoot your SMTP configuration. See SMTP for more detailed instructions on working with different SMTP services. Error messages should be one of two types:

   - **Basic validation**: we'll alert you if the email addresses you've entered don't follow standard email address conventions or if required fields have been left blank.
   - **SMTP provider validation**: if the error comes from the call to your SMTP provider, we'll return the error message they provide.

d. If everything is properly configured, you'll see a confirmation message:



e. You should receive an email with the subject line matching the **Email Subject** defined in the **Subscription Settings** section, from the address specified in your SMTP service's **Send From Address**. It should look something like this:



4. You can **Save** your changes to come back and finish the setup later, or finish enabling subscriptions now!

Configure public subscriptions

Last Modified on 05/29/2024 5:27 pm EDT

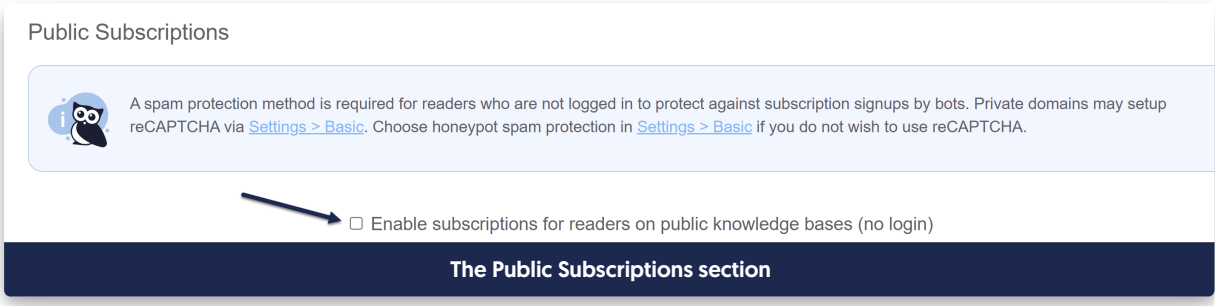
By default, subscriptions will only be enabled for logged-in readers only.

If you have a knowledge base that is partially or fully available to the public (e.g. doesn't require people to log in to read content), you might want to enable subscriptions for readers who aren't logged in. We call these Public Subscriptions.

Enabling public subscriptions in knowledge bases using honeypot spam protection

If you are using honeypot spam protection, to enable public subscriptions:

1. Go to **Settings > Subscriptions**.
2. In the **Public Subscriptions** section, check the box next to **Enable subscriptions for readers on public knowledge bases**



The Public Subscriptions section

3. Be sure to **Save**.

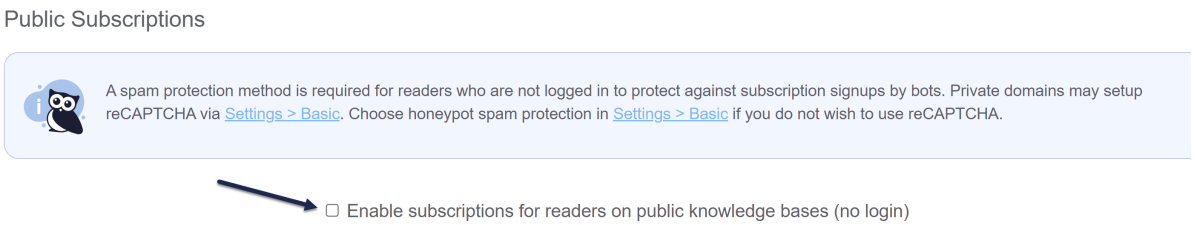
Enabling public subscriptions in knowledge bases using reCAPTCHA spam protection

If you are using reCAPTCHA spam protection with a KnowledgeOwl subdomain (such as support.knowledgeowl.com), skip to step 2 below.

If you are using reCAPTCHA spam protection with a private domain for your knowledge base (such as help.our-amazing-company.com), you will need to add a reCAPTCHA for your public subscriptions. We require this to prevent bot traffic:

1. Be sure you have a V2 reCAPTCHA key and secret added to **Settings > Basic > Spam Protection Settings**. See Add reCAPTCHA for more details.
2. Go to **Settings > Subscriptions**.

3. **In the Public Subscriptions section at the bottom of the page, check the box next to "Enable subscriptions for readers on public knowledge bases (no login)".**



4. **Be sure to Save your changes.**

The Subscribe button will now be visible to anyone viewing your knowledge base, whether they've logged in or not.

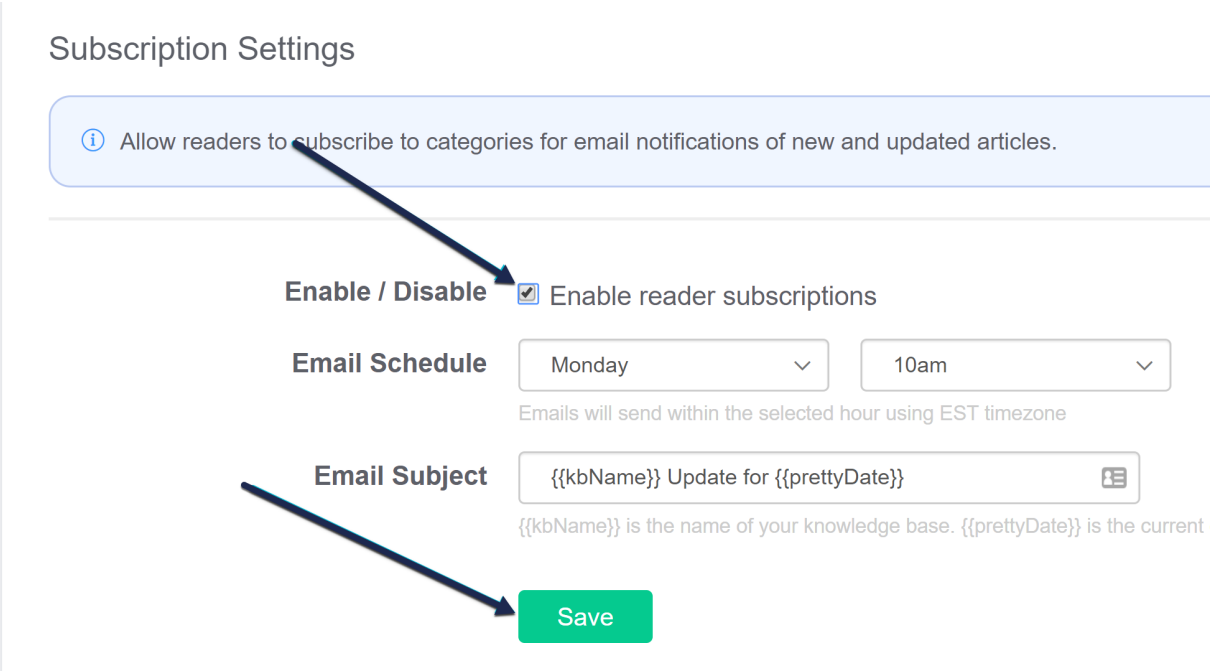
Enable subscriptions

Last Modified on 05/29/2024 5:28 pm EDT

Once you've edited your Email Schedule and Subject to your liking, set up and tested your SMTP, and (optionally) enabled Public Subscriptions and added a reCAPTCHA, you're ready to turn on Subscriptions.

To enable subscriptions:

1. In **Settings > Subscriptions** in the **Subscription Settings** section, check the box next to "Enable reader subscriptions".



2. Be sure to **Save** your changes.

At this point, subscriptions are live! Use the New/Updated callouts to trigger subscriptions to send.

Do not enable reader subscriptions until you have, at minimum, configured your SMTP settings. Without a valid SMTP configuration, no emails will be sent.

Add Subscribe button to topic and custom content categories

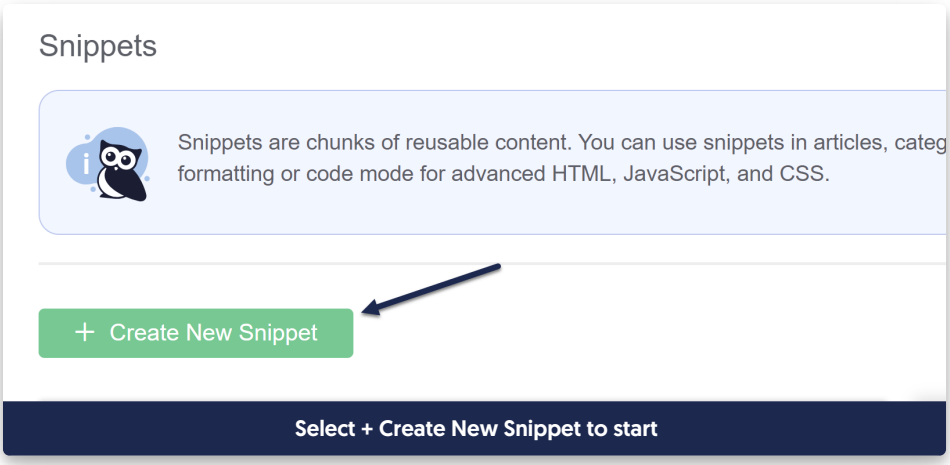
Last Modified on 05/29/2024 5:27 pm EDT

Subscribe buttons are automatically added to most category landing pages. They do not appear by default on topic or custom content categories.

If you'd like to add a Subscribe button to a custom content category or topic display category and have it float next to the category header (as is the default for standard categories), you can handle this by creating a snippet that will generate the Subscribe button and adding it to the categories manually.

To do so:

1. Go to **Library > Snippets.**
2. Click on the + **Create New Snippet** button.



3. Give your snippet a **Snippet Name**, like "Custom Content Subscribe Button". The **Merge Code Name** will be automatically generated from that Snippet Name, though you can adjust it if you'd like.
4. Give your snippet a **Description**, like "This snippet adds the Subscribe button to custom content categories and topic display categories it's added to. It positions the button in the category header. For custom content categories, insert the snippet anywhere into the body of the category; for topic display categories, paste the snippet merge code into the category description."
5. Click the dropdown next to **Snippet Content** to select **Code Editor**.
6. Copy the script below and paste it into the Code Editor:

```
<p>[template("cat-subscribe")]</p>
<script>
 $(function() {
  $(".ko-cat-sub-cntr").insertBefore($(".hg-article-header h1"));
 });
</script>
```

7. Once you're done editing your snippet, be sure to **Create** it.

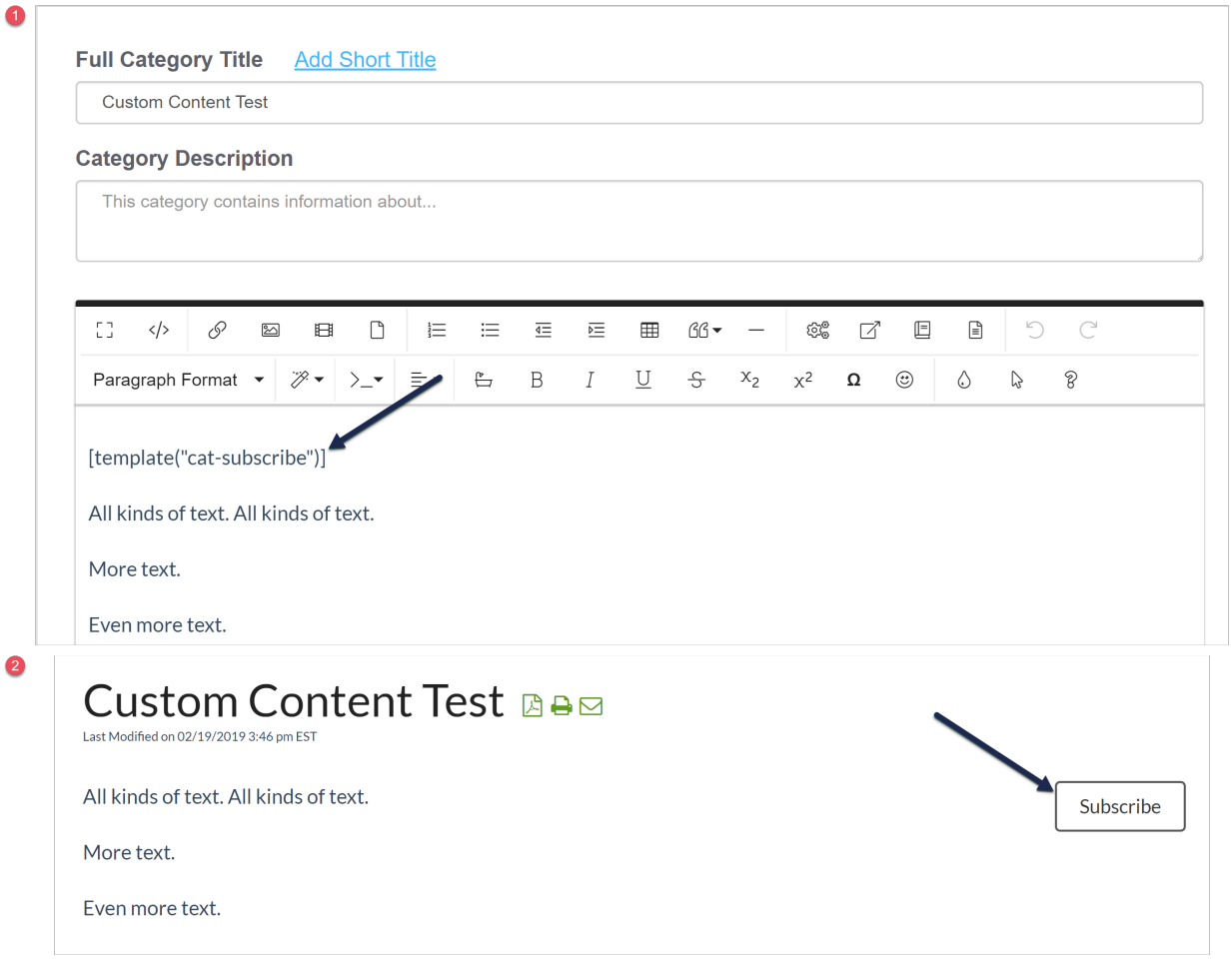
With your snippet created, you can now add it to the categories you wish:

- For custom content categories, you can use the Insert Snippet control in the editor bar to add the snippet anywhere in the custom content category body.
- For topic display categories, copy the snippet merge code and paste it directly into the category's description.

Alternatives

If you'd like to play around with where the Subscribe button is positioned, you can see the default behavior by copying this merge code and pasting it into your description of topic categories or the body content of custom content categories:

This will create a float-right Subscription button wherever you've placed the template code:



This Subscribe button will inherit the styling for Subscription buttons across your site. You can also Style the

Subscribe button differently.

Style the Subscribe button differently

Last Modified on 05/29/2024 5:28 pm EDT

There are two CSS classes that impact the Subscribe button:

- `.btn.btn-default.ko-cat-sub` : This is the styling for the button itself. So if you'd like to change the button styling in some way, here's where you do it. This might include: background color, the color (for the text), the border, box-shadow, or padding between the text and the button edges.
- `.ko-cat-sub-cntr` : This container is what gives the Subscribe button its float: right positioning and the margin-right. If you'd like to change button positioning on the page, you'll want to add custom CSS for this class.

To adjust the style for the button:

1. Go to **Settings > Style**.
2. Below the preview pane, be sure **Custom CSS** is selected.
3. Copy the default styling for the button from here and paste it into your Custom CSS:

```
.btn.btn-default.ko-cat-sub {
   background: #fff; /* Button color */
   color: #333; /* Subscribe font color */
   border: 1.5px solid #555; /* Button border--#555 sets the color */
   box-shadow: none;
   padding: 8px 18px;
}
```

4. Edit as necessary to get the look and feel you want.
5. **Save** your changes.

For example, here, we've added CSS to style the Subscribe button font color and button border to match the color we use across our theme:

```
.btn.btn-default.ko-cat-sub {
   color: #1d284f; /* Change button font color to KO theme*/
   border: 1.5px solid #1d284f; /* Change border color to KO theme*/
}
```

Force readers to subscribe with their reader account email address

Last Modified on 05/29/2024 5:28 pm EDT

By default, when readers subscribe to a category, they will first see a pop-up where they can enter the email address of their choice. This is by design, since some of our customers have readers who share accounts (such as one reader account per client, consulting firm, partner, etc.).

But if you always require your readers to have their own email address, you can bypass the screen where they enter an email address entirely, and take them straight to the Manage Subscriptions page.

This approach has a few advantages:

- **It's more foolproof**. There's no risk that they'll enter an improperly-formatted email address, or one with a typo in it.
- **It's faster**. It removes the extra step to enter an address and click another button before they're subscribed.
- **It prevents the use of personal email addresses**. You may have security or compliance reasons why you don't even want links to your knowledge base content to be emailed to non-work email addresses.



Note: you cannot make these changes if you are using Public Subscriptions.

To make these changes:

1. Go to **Settings > Style**.
2. Below the Preview pane, be sure **Custom HTML** is selected.
3. Next to the **Custom HTML** dropdown, be sure **Body** is selected.
4. Copy the code below and paste it into the bottom of the Custom HTML editor:

```
<script>
 $('.documentation-article .ko-cat-sub').click(function(){
    $('#subscription-modal form').submit();
 });
</script>
```

5. Now select **Custom CSS** below the Preview pane.
6. Copy the CSS Below and paste it anywhere into the Custom CSS section:

```
/* Hide the Subscription modal by default */
#subscription-modal {
    display: none !important;
}
```

7. **Save** your changes.

Widget 2.0 overview

Last Modified on 07/10/2024 4:33 pm EDT

One of the biggest concerns folks have when adopting a knowledge base is that toughest of questions: how do I get people to actually use my documentation? Requiring readers to go to yet another website--like your KnowledgeOwl knowledge base--seems like an extra step that may discourage people from using your documentation.

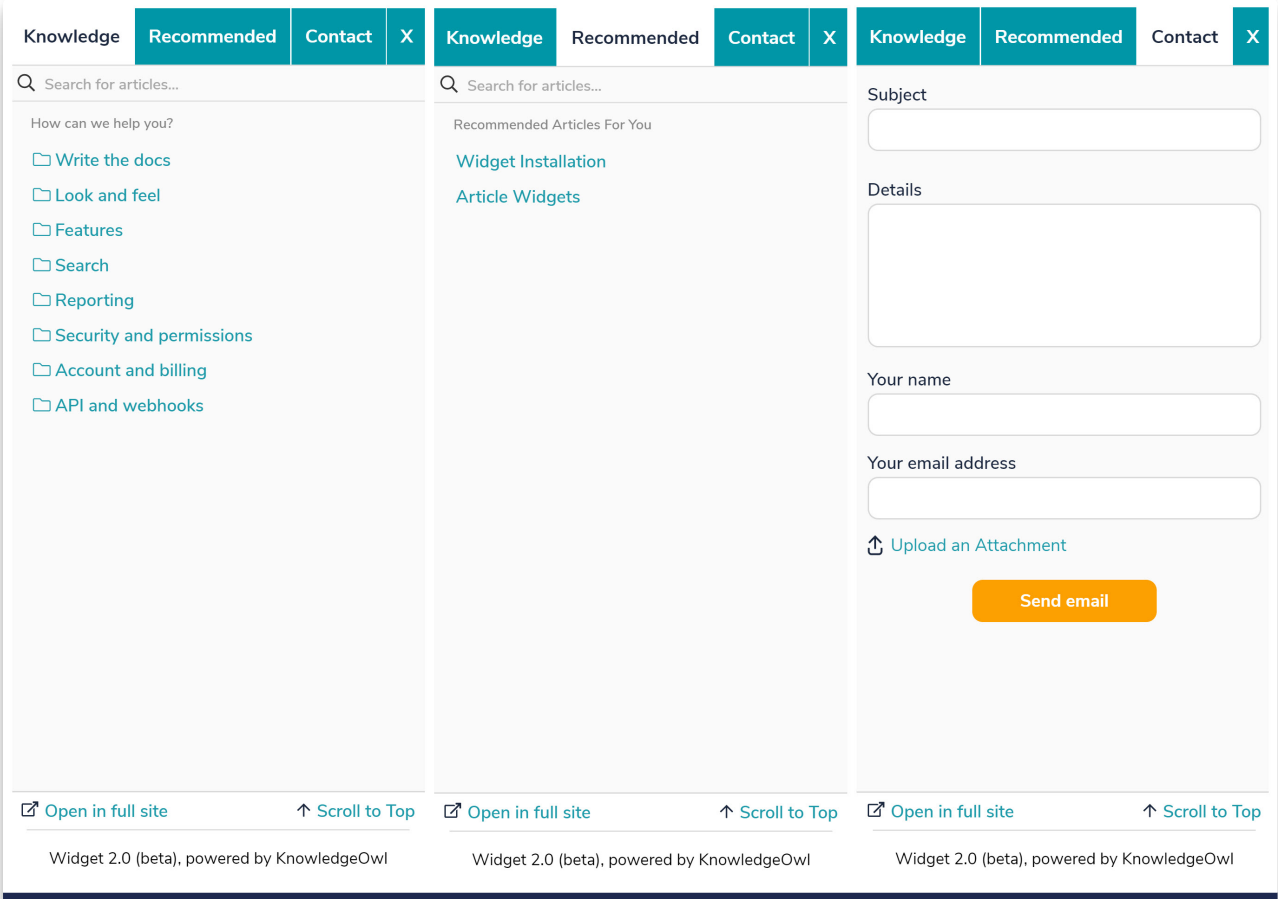
That's where our knowledge base widget comes in handy. You can embed this widget directly in other websites and browser-based applications. You set a few things up on the KnowledgeOwl side, copy an embed code from your knowledge base, and have your developers add that script to the website or application where you want your knowledge base web widget.

You can see this widget in action:

- On this documentation site, click "Contact Support" in the upper right (set to open to the Contact tab)
- In app.knowledgeowl.com as you are editing things, click the Help link in the upper right corner

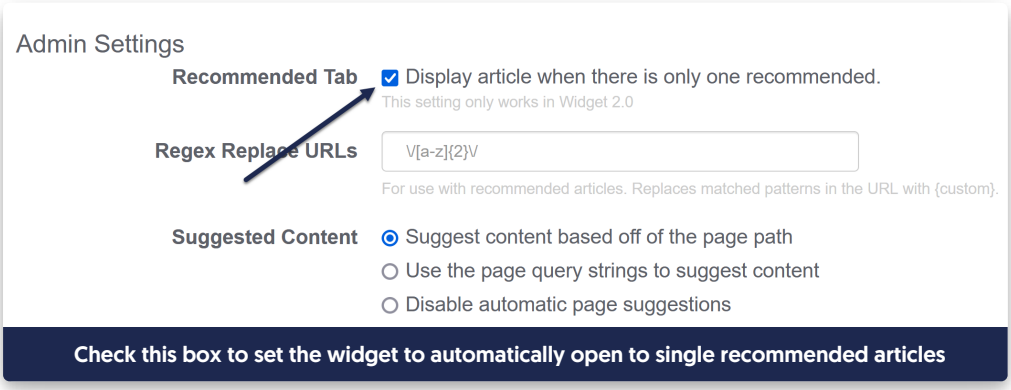
Widget layout

Out of the box, the widget has three tabs:



Sample widget tabs

- **Knowledge: This tab is basically a miniature version of your entire knowledge base. It opens to the homepage of your knowledge base by default. It's streamlined for navigation, so you can click into any of the content here to drill into it, just as you would on your full knowledge base.**
  - **If no recommended articles for the current page exist, the widget will automatically open to this tab.**
- **Recommended: This tab will display articles that are recommended for the page you're currently on. Learn more about Using the Widget for Contextual Help: Pages to Recommend On.**
  - **If recommended articles exist, the widget will automatically open to this tab.**
  - **You can control the order in which recommended articles appear by editing Recommended Article Weights in Reporting > Widget.**
  - ***Optional:* when only one recommended article exists, you can set the widget to automatically open to that article instead of opening to the Recommended tab:**



Check this box to set the widget to automatically open to single recommended articles

- **Contact: If you have enabled the Contact Form in your knowledge base, this tab will display it. If you aren't using Contact Form, you won't see this tab. Once a reader submits the contact form, the Contact tab will display a thank-you message until that reader either:**

- Closes and reopens the widget
- Clicks to one of the other tabs and then clicks back to the Contact tab

How to use the widget

First, configure the widget in **Settings > Widget**.

Once you've saved those configurations, copy the embed code provided at the bottom. Give this code to your developers to embed in your website, software application, etc. (We recommend tying it to a button or a link, but there are all kinds of possibilities.) See Widget configuration & installation for more information.

Once your developers have added the embed code and properly tied it to something in your website/application (such as a button, link, etc.), your readers will be able to use the widget. To get your Recommended tab working fully, see Using Widget 2.0 for Contextual Help: Pages to Recommend On.

If your knowledge base requires readers to login to view your knowledge base, or if you have content restricted to specific groups and you want the widget to know about that, you'll need to add authentication to your widget to show the restricted content. Widget 2.0 supports OAuth2 and JWT authentication.

If you're working with one of your developers, you might also want to review the options in Advanced widget configuration & methods, particularly if you're trying to use the widget in a single page application.

Modern Widget vs. Widget 2.0 Comparison

Last Modified on 05/29/2024 5:28 pm EDT

For customers already using Modern or Legacy Widget, sometimes we're asked: why should I switch to Widget 2.0?

We're so glad you asked.

First, the big reason:

While we don't plan to totally discontinue Modern Widget any time soon, we also aren't going to prioritize working on it, either.



As of January 2022, we will no longer be releasing new features or functionality for the Modern or Legacy Widgets. We're focusing our developer resources on Widget 2.0. As of August 2022, we are largely not fixing newly reported bugs with these widgets.

But more importantly, Widget 2.0 offers a lot of things that Modern Widget (and Legacy Widget) do not.

Here's a full side-by-side feature comparison. Here's a quick breakdown of the color coding:

- No background: Widget 2.0 and Modern Widget have the exact same feature
- Green background: Widget 2.0 has a feature that Modern Widget lacks
- Yellow background: Widget 2.0 has a feature that exists in a different way from Modern Widget; you decide which you prefer
- Red background: Widget 2.0 lacks a feature that Modern Widget has

Area	Feature	Modern Widget	Widget 2.0
Layout & Navigation			
	Widget layout	Single page, contact form accessed through button	Separate tabs for Knowledge, Recommended, and Contact
	Widget container width	Preset; uneditable	Preset; uneditable
	Navigation through knowledge base	Limited; navigation through Popular Articles list, Recommended Articles list, hyperlinks within content, and search only	Full navigation possible through Knowledge tab
	Breadcrumbs	No content breadcrumbs displayed	Summary breadcrumbs always displayed; full breadcrumb display available with toggle

Area	Feature	Modern Widget	Widget 2.0
	Open in full site link in footer	Must be manually created/added	Automatically included in footer
	Scroll to top link in footer	Must be manually created/added	Automatically included in footer
	Accessibility	Widget iframes have ids, but no titles	Widget iframes have ids and titles
Content Display			
	Article content display	Supported	Supported
	Custom content category display	Supported	Supported
	Topic display category display	Supported	Supported
	Default category display	Not supported; prompts to open in full site	Supported
	Blog style category display	Not supported; prompts to open in full site	Supported
	Display of recommended articles	In **Suggested For You** section (if none, section isn't displayed)	In **Recommended** tab (Widget opens to this tab if there are any; if none, opens to Knowledge tab)
	Popular Articles list	Displayed in its own section	Not displayed anywhere
Search			
	Typeahead search vs. full search UI	No visible difference/hard to tell which search is being used	Visible difference and text to make full search discoverable
	Glossary terms in search results	Not supported	Supported
	Contact form search	Regular search bar shown, but no deflection in contact form subject	Contact Form subject does auto-suggested search, so ticket deflection is possible
Authentication			
	Supported authentication methods	JWT, OAuth2	JWT, OAuth2
Custom Widget Content			
	Custom body content	HTML block editable in settings to insert under Suggested for you/Popular Articles display	No explicit custom body content section
	Custom footer content	HTML block editable in settings	HTML block editable in settings
Contact Form			
	Contact Form Zendesk custom fields	Supported	Not supported
	Contact Form custom fields	Supported	Not supported

Area	Feature	Modern Widget	Widget 2.0
	Contact Form multiple email addresses	Supported	Supported
	Contact Form reCAPTCHA	Not supported	Supported; automatic for KO subdomains; must be manually configured for private domains
Reporting			
	Article views	Tracked in Popular Articles report	Tracked in Popular Articles report

Why stick with Modern Widget?

In case tables aren't your thing, there are a couple features in Modern Widget that do not yet exist in Widget 2.0:

- Zendesk contact form integration using custom fields
- Contact Form custom fields
- Popular Articles in-widget display
- Editable Custom HTML block in widget body

If you're heavily using those features, Modern Widget might not be right for you. (Though if you are using these features and that's the only thing holding you back from making the switch, please contact us so we can add you to these feature requests and let you know once they're available!)

Transition checklist: from Modern Widget to Widget 2.0

Last Modified on 05/29/2024 5:28 pm EDT

Here's a list of key considerations if you're considering or planning to upgrade from using the Modern Widget to Widget 2.0:

- ☐ **Update Widget Settings to use Widget 2.0** (**Settings > Widget**, select Widget 2.0 rather than Modern Widget. Click **Save**.)

- ☐ **Copy the new embed script into your test environment or application.** The Modern Widget in your live environment should continue to work while you do this testing. If you'd prefer, we're happy to provide a sandbox copy of your live knowledge base so you can test Widget 2.0 settings without any potential impact to your current widget usage; contact us to request a sandbox copy and let us know how long you think you'll need it. We recommend using a sandbox if you're switching authentication types, etc., during this process.

- ☐ **Choose display settings and tweak colors to match your branding.** You can use Custom CSS to change fonts, styles, etc. We also no longer do the tab + label display automatically--default display options are a ? icon or attach to element. See Widget configuration & installation for more details.

- ☐ **Customize tab labels, text, and headers**: Modern Widget had all content in a single scrolling tab. Widget 2.0 has three different tabs (Knowledge, Recommended, and Contact), so it may take some time for you to decide on tweaks to the tab labels, headers, contact form, etc.



As of August 2021, the Widget 2.0 Contact Form does not incorporate Custom Fields or ZenDesk fields in the main **Knowledge Base > Contact Form** settings. Contact us if you'd like to be added to the feature request for any of these fields.

- ☐ **Update Outer Widget Styles and Contact Form CSS**: Styles included in Outer Widget Styles and Contact Form CSS of Modern Widget should be reviewed before being included in Widget 2.0's Custom Widget styles, as containers and styles have changed.

- ☐ **Update Javascript**: If you have custom JS in your website/application or included in the Custom Body Content of your Modern Widget, add that to Widget 2.0's Custom Widget Javascript. This entire section gets wrapped in `<script>` tags, so you don't need to include them.

- ☐ **Update your authentication**: If you previously used an authenticated widget, you can now choose between JWT and OAuth2 authentication. Some authorization used to be partially included in our embed script in the `_ko16_p.push(['_setToken', 'OAUTH2 TOKEN']);` section; it is no longer included and you'll need to handle that code yourself.

- ☐ **Review your existing implementation for uses of _ko16 functions and methods**: These will no longer work in Widget 2.0 and need to be transitioned to their _ko19 equivalents. See Widget methods and functions

dictionary for all options available in Widget 2.0.

- `_ko16.openArticle('article-permalink');` would open the widget to a specific article; in Widget 2.0, `_ko19.OpenArticle['article-permalink'];` needs to be used followed by `_ko19.open();`
    - To open Modern Widget to a specific tab, several different methods might have been used; in Widget 2.0, you can choose several different load methods and choose them onOpen (end-user still must click to open the widget) or onLoad (widget will open and display that tab on full page load, no interaction required.
    - For Single Page Application behavior, Modern Widget used `__ko16.updatePageLoc('currentUrl');` whereas Widget 2.0 uses `_ko19.updateRecommended('currentUrl');`
    - Using a _ko16 method not referenced here, and unsure how to update it? Contact us with a sample of the code and behavior and we'll get you what you need.

☐ Replace the existing embed script in your website or application with the new embed script.

Widget Settings section

Last Modified on 05/29/2024 5:28 pm EDT

The **Widget Settings** section is the first section in **Settings > Widget** (yes, these are confusingly similar). These settings determine how the widget will be opened or launched in your website/application.

The settings are basically divided into two options here:

- An automatic circular "?" icon -- no coding required!
- Attach the widget to an element of your choice (such as a menu option, top navigation link, hyperlink, icon, image, etc.) by element ID

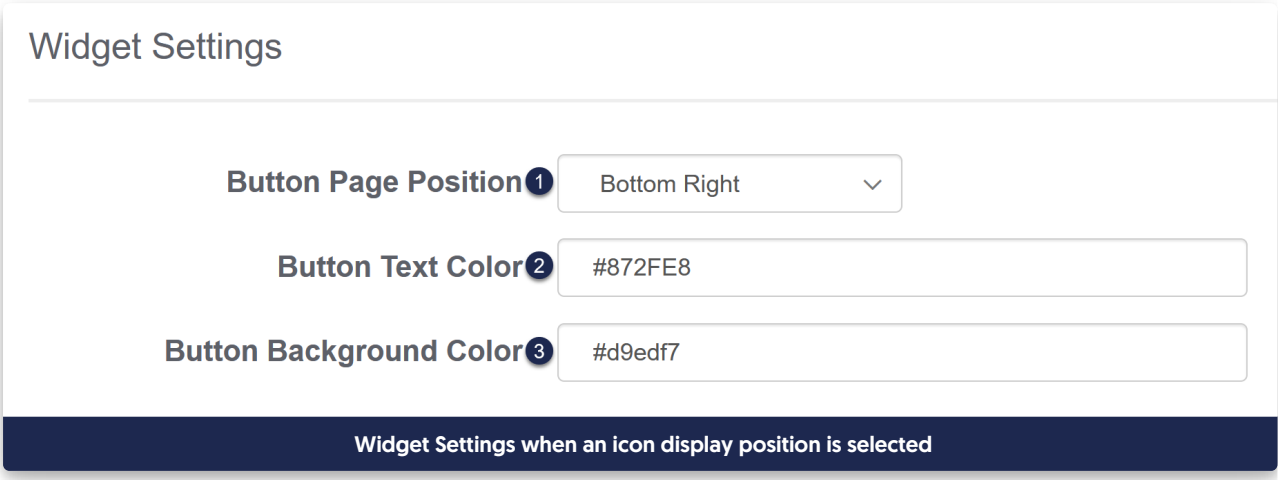
See details below for setting up either option.

If you make changes to these settings, it may take up to an hour to see them in your browser due to caching. You can bypass the caching by doing a hard refresh.

Automatic icon

With the automatic icon option, you don't need to adjust anything else on the website you're adding the code to. The script will automatically create the icon and place it based on the location setting you select.

To use this configuration, select any of the **Page Position** options other than Attach to Element (e.g. Bottom Right, Top Center, etc.). If you want to move the icon, you simply select a different display location from the dropdown:



Widget Settings when an icon display position is selected

1. **Button Page Position:** use this dropdown to select the display location for the icon.
2. **Button Text Color:** sets the color of the "?" on the icon. Use a hex color.
3. **Button Background Color:** sets the color of the icon button. Use a hex color.

4. Be sure to **Save** any changes you made here.

Here's what a widget icon will look like if it's configured with:

- **Button Page Position:** Bottom Right
- **Button Text Color:** White
- **Button Background Color:** Orange



Widget using the "Bottom Right" display settings

Attach to element

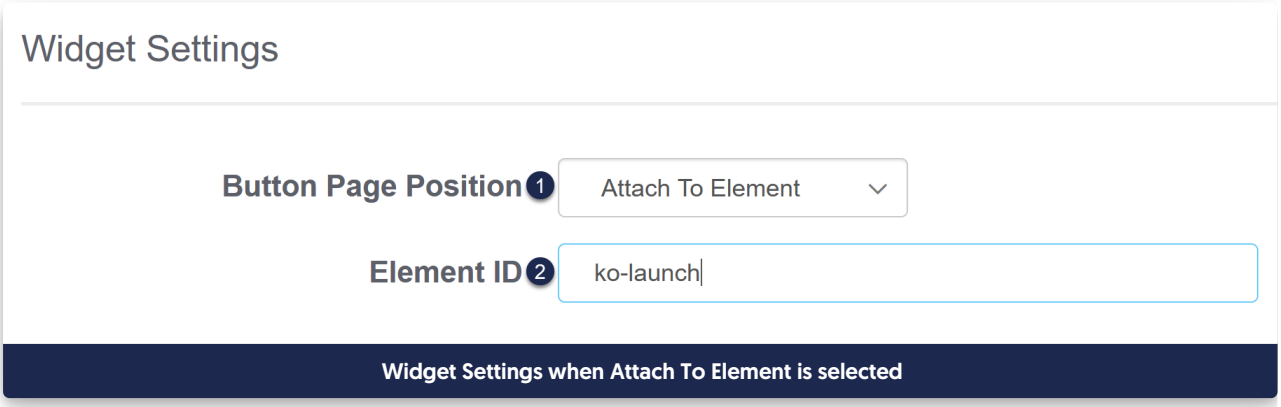
Rather than having us automatically create an icon, you can launch the widget by attaching it to an element of your choice--this can be a menu option, an icon, a hyperlink, etc.

For example, in this screenshot, the "Widget Help" link in the upper right will open the widget:



Widget Help top navigation link will launch the widget using Attach To Element

To use this option, select Attach to Element from the **Button Page Position** dropdown:



Widget Settings when Attach To Element is selected

1. In the **Button Page Position** dropdown, select Attach to Element. Attach To Element is the only Button Page Position option which will let you attach the widget to an element of your choice; all other options will use the icon.

2. Once Attach To Element is selected, you'll see an **Element ID** field. Set the Element ID to match the html ID attribute of the element you want the widget attached to in your website or application. When someone clicks on this element, the widget will open. If your developers are creating an element from scratch, we recommend using ko-launch or another obviously KnowledgeOwl-related element ID. You can use any Element ID you choose except for `ko-widget`; we prevent that ID from being used, and you'll see an error message if you try to use it.

3. Be sure to **Save** any changes you made here.

For example, if we used "ko-launch" as our Element ID, we might add this HTML element to a top navigation option in our other website:

```
<li><a class="header-link" id="ko-launch" href="">Widget Help</a></li>
```

That code might be included in the top navigation, producing something like this:



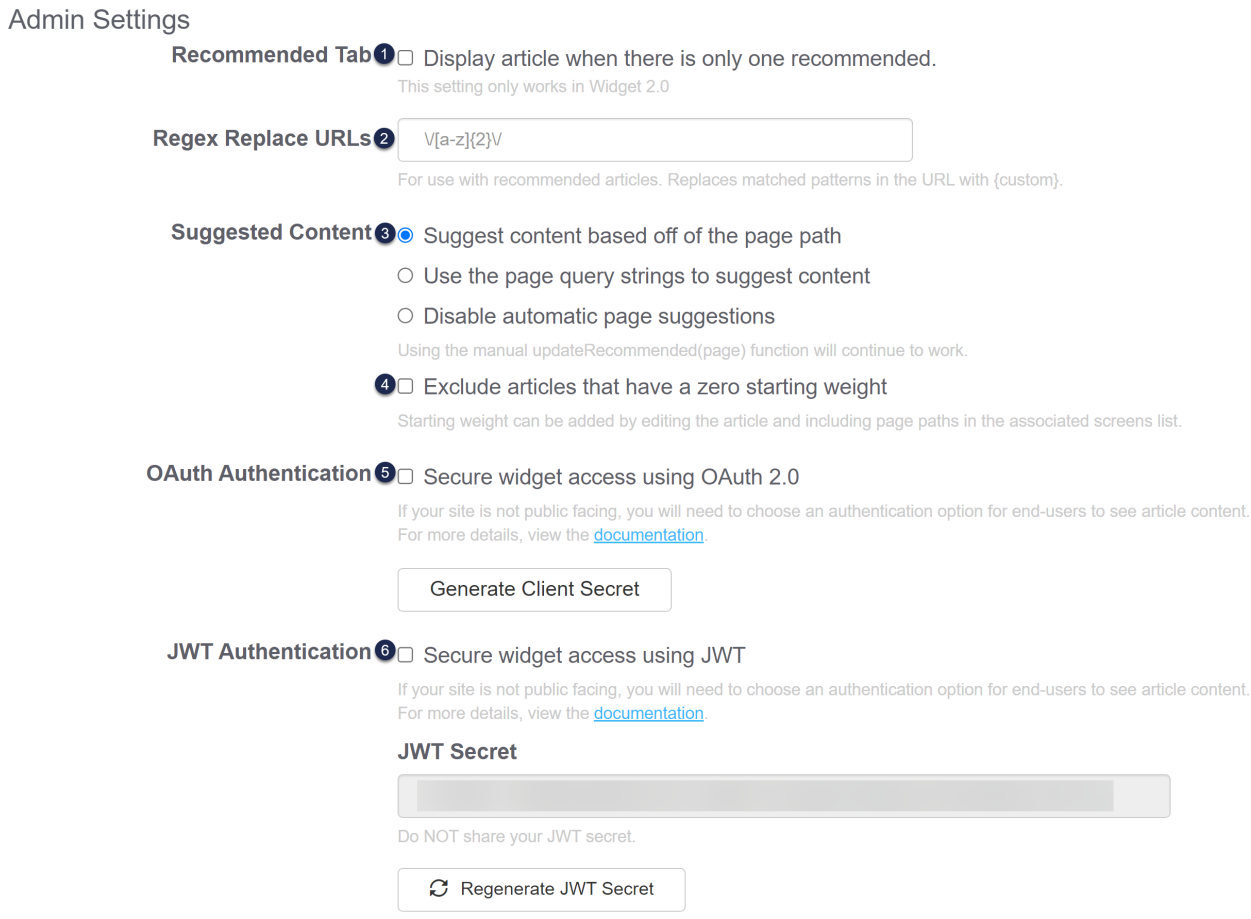
Widget Help top navigation link will launch the widget using Attach To Element

Widget Admin Settings

Last Modified on 05/29/2024 5:28 pm EDT

The Admin Settings section of Settings > Widget controls the functionality of the widget behind the scenes, including if/how it suggests content and if/how it's authenticated.

If you make changes to these settings, it may take up to an hour to see them in your browser due to caching. You can bypass the caching by doing a hard refresh.



1. **Recommended Tab:** If you are using the widget to automatically recommend content (using Using Widget 2.0 for Contextual Help: Pages to Recommend On), this option will determine what happens if the widget opens and there is only one recommended article or category in the list. If you check the box, when the widget opens and there's only a single recommended article or category, the widget will automatically open that article or category. If you leave the box unchecked, the Recommended tab displays the list containing the single article or category.

2. **Regex Replace URLs:** If you are using the widget to automatically recommend content, it has to do a little parsing of the URLs it finds to determine what content to show. Since URLs often contain ID values that might vary from user-to-user but the same overall path, Widget 2.0 includes a built-in regex that uses an

`{id}` variable. `{id}` only works with numeric and 24-digit hexadecimal IDs. For IDs that don't match either of those patterns, you would use this Regex Replace URLs field to define the regex that should be used here, and you'd use the `{custom}` variable in your Recommend on Pages URLs. regex101 is a handy site that allows you to try out Regex rules against example words and phrases. When testing regex for use in KnowledgeOwl, select **PCRE2 (PHP >= 7.3)** under **FLAVOR**.

3. **Suggested Content**: This section will determine which portion of the URL the widget uses to try to identify recommended content. It has three options:
    - **Suggest content based off of the page path** (default): use this setting if the website where you're embedding the widget uses the URL or page path to differentiate pages. For example, we use this setting for the widget in this support knowledge base, since our page URLs are formatted without query strings and with no special characters.
    - **Use the page query strings to suggest content**: use this setting if you want to recommend based on query strings, which appear in the URL as ?*variable*=, such as ?s= or ?client= for example. If your website's URLs don't have query strings--or the query strings aren't meaningful for recommendation distinctions--don't use this setting.
    - **Disable automatic page suggestions**: use this setting if you plan to consistently override the page path or query string by using our Single Page Application methods, or if you don't want the widget to suggest content at all. This effectively turns off automatic page suggestions and the widget will only provide suggestions when the `_ko19.updateRecommended` method is being used.
4. **Suggested Content, exclude articles that have a zero starting weight**: Widget 2.0 is set up to be a "learning" widget. As people open the widget, it will track which articles or categories people end up opening from a given page. It will save this information as the Learned Bias in Widget reporting. Once the Learned Bias of a resource gets high enough, the widget will include that article or category in the Recommended tab list automatically. While this learning process can be great, if you want tight control over the content that you're recommending, you might want to disable it. Checking this box will make the widget only use the recommendations you have explicitly assigned in the Recommend On Pages (it basically ignores anything that only has a learned bias). Leaving the box unchecked will allow the widget to continue to use the learned bias to present recommended content.
5. **OAuth Authentication**: If you want or need to authenticate your widget using OAuth2, you can use this section to generate the OAuth client secret, enable OAuth authentication, or regenerate the client secret. See Widget 2.0 OAuth2 authentication for full instructions and see Widget authentication--when and how to use it to figure out if you need authentication.
6. **JWT Authentication**: If you want or need to authenticate your widget using JWT, you can use this section to grab your JWT client secret, enable JWT authentication, or regenerate the client secret. See Widget 2.0 JWT authentication for full instructions and see Widget authentication--when and how to use it to figure out if you need authentication.
7. If you've made any changes to this section, be sure to **Save** them.

Widget Customize Text section

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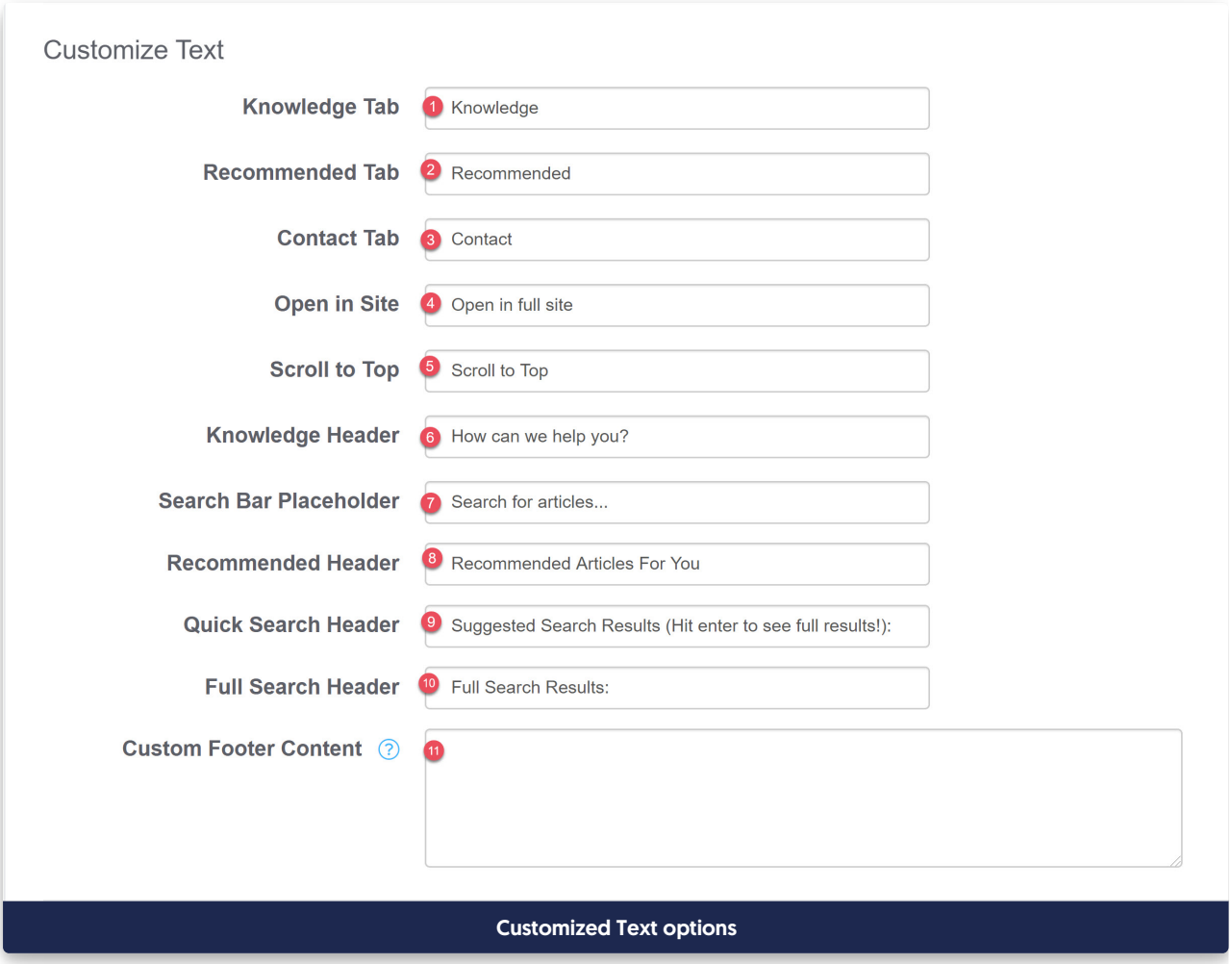
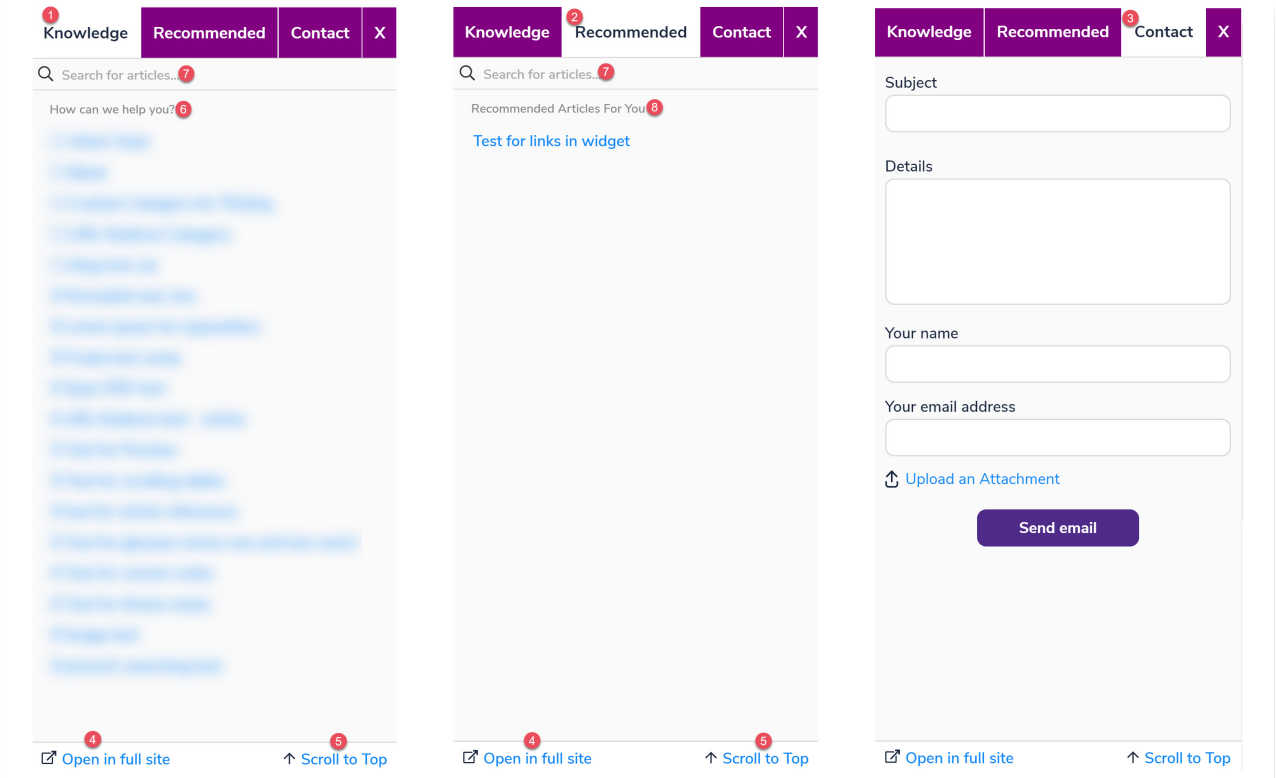
In **Settings > Widget**, the **Customize Text** section allows you to change a variety of text fields:

- The Knowledge, Recommended, and Contact tab labels
- The header text displayed in the Knowledge and Recommended tabs
- The Open in full site and Scroll to top actions in the footer
- The search bar placeholder and the header text displayed above Quick Search and Full Search results
- Add a custom footer that will display below the open in full site and scroll to top footer

If you make changes to these settings, it may take up to an hour to see them in your browser due to caching. You can bypass the caching by doing a hard refresh.

If you want to change any of this text, check out the screenshots and descriptions below so you know you're changing the right field(s)!





Widget tabs with matching Customize Text numbering

1. **Knowledge Tab:** Text entered here will change the label for the Knowledge Tab, the first tab in the widget. This tab lets your readers browse and navigate your knowledge base. All articles clicked on in other tabs will open here, too.

2. **Recommended Tab:** Text entered here will change the label for the Recommended Tab, the second tab in the widget. If you are using Contextual Help and Pages to Recommend On, the recommended articles for the current page display here.

3. **Contact Tab:** Text entered here will change the label for the Contact Tab, the third tab in the widget. (This tab only displays if you are using the Contact Form in your knowledge base.)

4. **Open in Site:** All three widget tabs include a footer which displays an Open in Site link. Clicking this link will open your full knowledge base in a separate tab, opened to the page currently displayed in the widget. (For the Recommended tab, Open in Site will take readers to your knowledge base's homepage.)

5. **Scroll to Top:** All three widget tabs include a footer which displays a Scroll to Top link. This link is shown on non-touch devices so that if someone is scrolling through a lengthy article in the widget, they can quickly jump back to the top of the article.

6. **Knowledge Header:** Text entered here appears at the top of the Knowledge Tab.

7. **Search Bar Placeholder:** Text entered here is displayed in the search bar when it's empty. The search bar appears on the Knowledge and Recommended tabs.

8. **Recommended Header:** Text entered here appears at the top of the Recommended Tab.



9. **Quick Search Header:** Text entered here displays at the top of the search results as someone types into the search bar.

10. **Full Search Header:** Text entered here displays at the top of search results once someone hits enter or completes a full search.

11. **Custom Footer Content:** You can insert your own custom footer, which will appear below the Open in Site and Scroll to Top footer. Text entered here will display there.

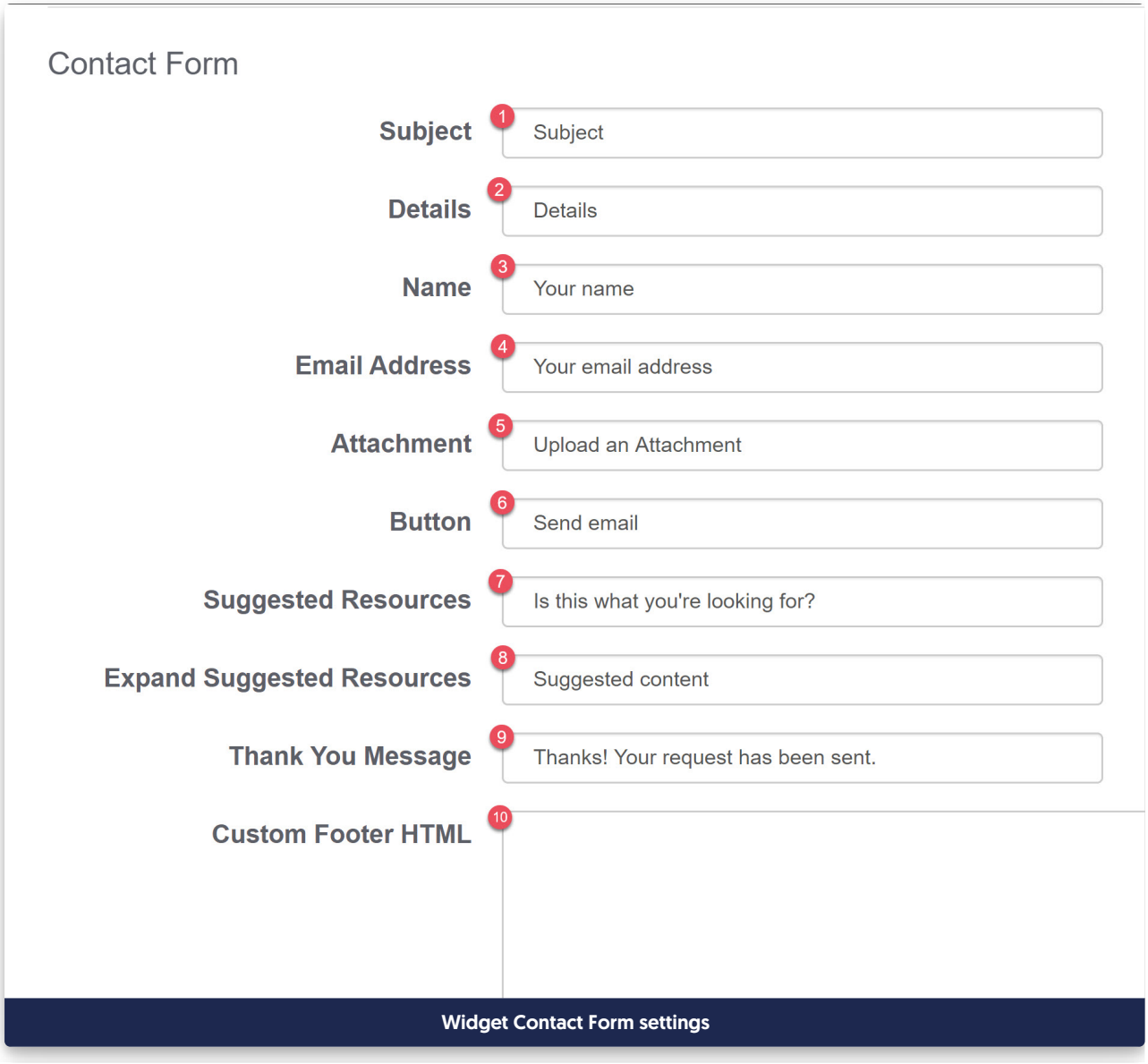
Widget Contact Form section

Last Modified on 05/29/2024 5:28 pm EDT

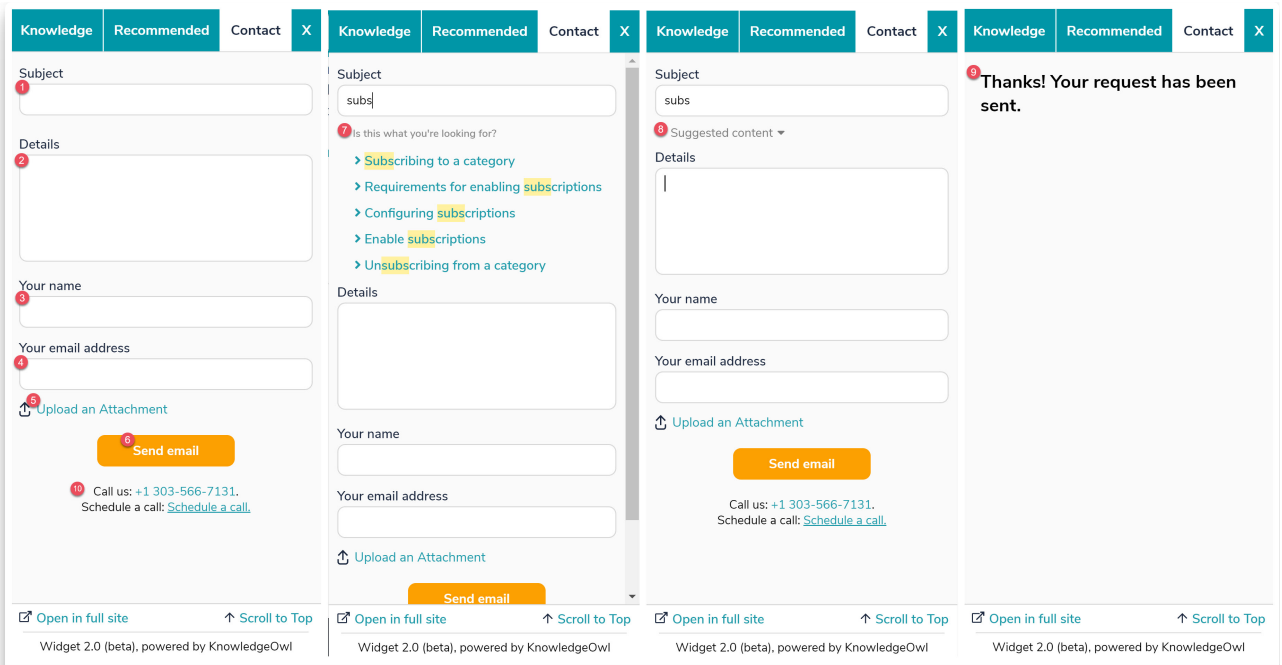
In **Settings > Widget**, the **Contact Form** section allows you to change some of the text labels and placeholder text in the widget's Contact tab, including:

- Field labels
- Search results header
- Thank you message
- Add a custom footer

If you make changes to these settings, it may take up to an hour to see them in your browser due to caching. You can bypass the caching by doing a hard refresh.



Widget Contact Form settings



Widget Contact Form settings in widget

1. **Subject:** Text entered here changes the label for the Subject field.
2. **Details:** Text entered here changes the label for the Details field.
3. **Name:** Text entered here changes the label for the Name field.
4. **Email Address:** Text entered here changes the label for the Email address field.
5. **Attachment:** Text entered here changes the label for the Upload an Attachment field.
6. **Button:** Text entered here changes the label for the button that submits the contact form.
7. **Suggested Resources:** Text entered here changes the header above the Suggested Articles once a reader types into the Subject field.
8. **Expand Suggested Resources:** Text entered here changes the text next to the expand arrow when the suggested resources are collapsed.
9. **Thank You Message:** Text entered here changes the Thank you message that appears after a reader submits the contact form.
10. **Custom Footer HTML:** You can add a custom footer which will appear below the main body of the contact form. This field accepts HTML, so you can include links to a privacy policy, data retention policy, etc.

As of July 2023, the Widget 2.0 Contact Form does not incorporate Custom Fields or ZenDesk fields in the main **Knowledge Base > Contact Form** settings. Contact us if you'd like to be added to the feature request for any of these fields.

Custom Widget Styles

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In addition to changing the widget tabs, labels, and headers by using the built-in settings, you can also customize its look and feel using CSS and Javascript.

The **Custom Widget Styles** section of **Settings > Widget** lets you add custom CSS to style your widget:



Sample custom CSS in Custom Widget Styles

If you make changes to these settings, they should show up nearly instantly in your live widget.

You can play around with a right-click and inspect on various fields or areas in the widget to try to identify the classes being used. Here are a few of the most frequently changed styles. You can copy and paste these in to your Custom Widget Styles section and then change the highlighted text to make adjustments:

Change the background color of the tabs

To use this code, update the value used for background-color in row 3 with the color of your choice. Here, we use a hex code but you can use rgb values.

```
/* Tab color */
.widget .widget__nav a {
   background-color: #0097a7;
}
```

Change the font on the tab labels

To use this code, update the font-family in row 3 from Neuton to a family of your choice.

```
/* Tab label font used (must be defined on the site where widget is being used */
.widget .widget__nav a {
  font-family: Neuton;
}
```

Change the color of all hyperlinks

To use this code, update the value used for color in row 7 with color of your choice. Here, we use a hex code but you can use rgb values.

```
/* Change the color of hyperlinks */
.article-links a,
.list-links a,
.list-links i,
.btn-upload,
a {
    color: #1f9baa;
}
```

Change the contact form submit button color

To use this code, update the value used for background-color in row 3 with the color of your choice. Here, we use a hex code but you can use rgb values.

```
/* Contact Form submit button color */
.form .form-submit {
    background-color: #fc9f00;
}
```

Change the > icon next to articles in the Knowledge tab and search results to a different icon

We use a FontAwesome chevron-right icon next to the titles of articles in the Knowledge tab and the search results.

If you'd like to change this to use a different FontAwesome icon, you'll need to know the unicode for the FontAwesome icon you'd like to use. Replace the f15c in row 5 below with that unicode:

```
/* Change the default ">" icon in the Knowledge tab navigation (chevron-right)
and the Search results (angle-right), including Contact Form search results */
.list-links .fas.fa-chevron-right:before,
.list-links .fas.fa-angle-right:before {
  content: "\f15c" !important;
}
```

Hide one of the widget's tabs

You can use CSS to hide one or more of the tabs from the widget. See Hide one of the Widget 2.0 tabs for full instructions.

Custom article styles in the Widget

Some authors want to style article elements differently in the widget from their main knowledge base (such as article title, etc.).

For these customizations, instead of using **Settings > Widget**, you'll add the Custom CSS directly to **Settings > Style**. Preface your class selectors with .w-documentation-article, which specifically targets articles displayed in the widget rather than in the knowledge base.

1. Go to **Settings > Style**.
2. Below the preview pane, be sure **Custom CSS** is selected.
3. Add the Custom CSS for your widget article styles.
4. **Save**.

For example, h1.hg-article-title is the CSS selector for the article title in your full knowledge base. This sample code will let you set the article title to a 20px font-size in the widget only (you can update the font-size in row 2 to any size you'd like):

```
.w-documentation-article h1.hg-article-title {
  font-size: 20px;
}
```

Custom Widget Javascript

Last Modified on 05/29/2024 5:28 pm EDT

For additional customizations of behavior in the widget (such as removing some fields entirely, changing the order, etc.), you'll need to use Javascript (JS) in the widget.

If you make changes to these settings, they should show up nearly instantly in your live widget.

To add widget JS:

1. Go to **Settings > Widget**.
2. Add your JS to the Custom Widget Javascript section.
3. **Save** your changes.



Sample Custom Widget Javascript

You do **NOT** need to add `<script>` tags around code entered in the Custom Widget Javascript section.

Working with the Contact tab

Javascript for the contact form needs to go inside the `onTabChange` function. Inside this function, you have access to `data.oldTab` and `data.newTab` to hook onto the tabChange events:

```
//JS for the contact form needs to go inside onTabChange function
var onTabChange = function(data) {
    //you have access to the data.oldTab and data.newTab to hook onto these events if it helps. Example:
    console.log("Tab changed from " + data.oldTab + " to " + data.newTab);
    //do some code down here
}
```

For example, this code will hide the "Upload file attachment" option in the contact form:

```
//JS for the contact form needs to go inside onTabChange function
var onTabChange = function(data) {
    //simple example of hiding an option
    //hide file attachment option
    $('.form__upload').hide();
}
```

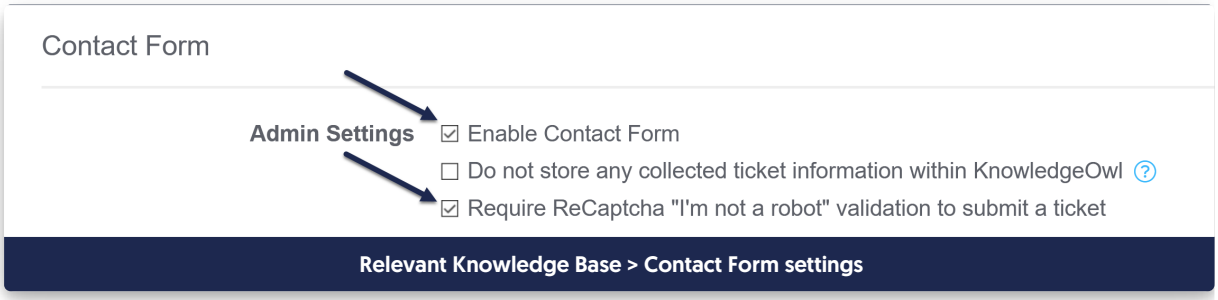
Protect Widget 2.0 Contact Form with reCAPTCHA

Last Modified on 05/29/2024 5:28 pm EDT

If you are using Contextual Help Widget (2.0) on a publicly-available site, we recommend adding a v3 reCAPTCHA to protect your Widget 2.0 Contact Form from spam and attacks.

To enable this option:

- You must enable the Contact Form in your knowledge base.
- You must be using Contextual Help Widget (2.0).
- You must select the option to **Require ReCaptcha "I'm not a robot" validation to submit a ticket** in your Contact Form settings:



If you're using a KO subdomain, you don't need to do anything; if you're using a private domain, you'll want to add a V3 reCAPTCHA key. See below for more info.

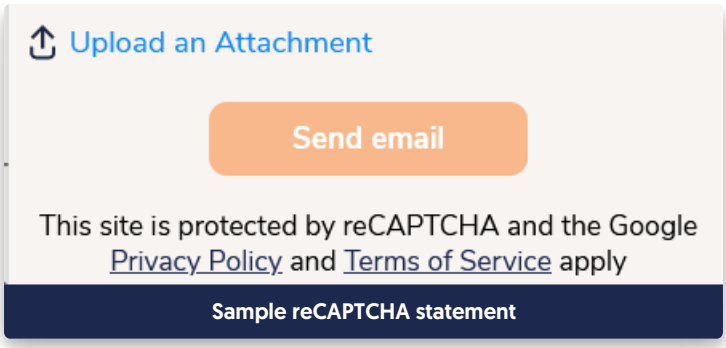
How does it work?

Widget 2.0's Contact tab is aware of the reCAPTCHA setting in **Knowledge Base > Contact Form**, so you can enforce reCAPTCHA on your widget contact form to prevent spam submissions there, just as you would in the full contact form. reCAPTCHA is a free service from Google designed to verify that someone interacting with your site is a real person and not a bot. A "CAPTCHA" is a simple test--usually a task that is very easy for a human to perform, but hard for bots and other malicious software to figure out.

This way, no matter where your widget is embedded, you can apply the same reCAPTCHA protections to the Contact tab that you might use in the knowledge base Contact Form itself.

For the Widget Contact tab, we use reCAPTCHA V3, which is a silent/invisible reCAPTCHA--no boxes to check or fire hydrants to find. reCAPTCHA calculates a score behind-the-scenes to determine if your reader is a bot or a human. Widget readers who fail the invisible V3 will not be able to submit the Contact tab.

The only obvious change to the widget end-user experience is a required statement in the Contact tab, just below the submit button:



Sample reCAPTCHA statement

This statement is not editable/removable and will appear automatically. (This is part of Google's reCAPTCHA terms of service, and we felt the statement was better than forcing a reCAPTCHA icon to appear over your website, for example.)

You can see this footer statement now by opening the widget in the KnowledgeOwl app (click **Help** in the upper right)--or click Contact Support in our support documentation--and viewing the Contact tab. ☺

Customers with KnowledgeOwl subdomains

As with other reCAPTCHA settings, if you are using a KnowledgeOwl subdomain (like mykb.knowledgeowl.com), you do not need to make any changes.

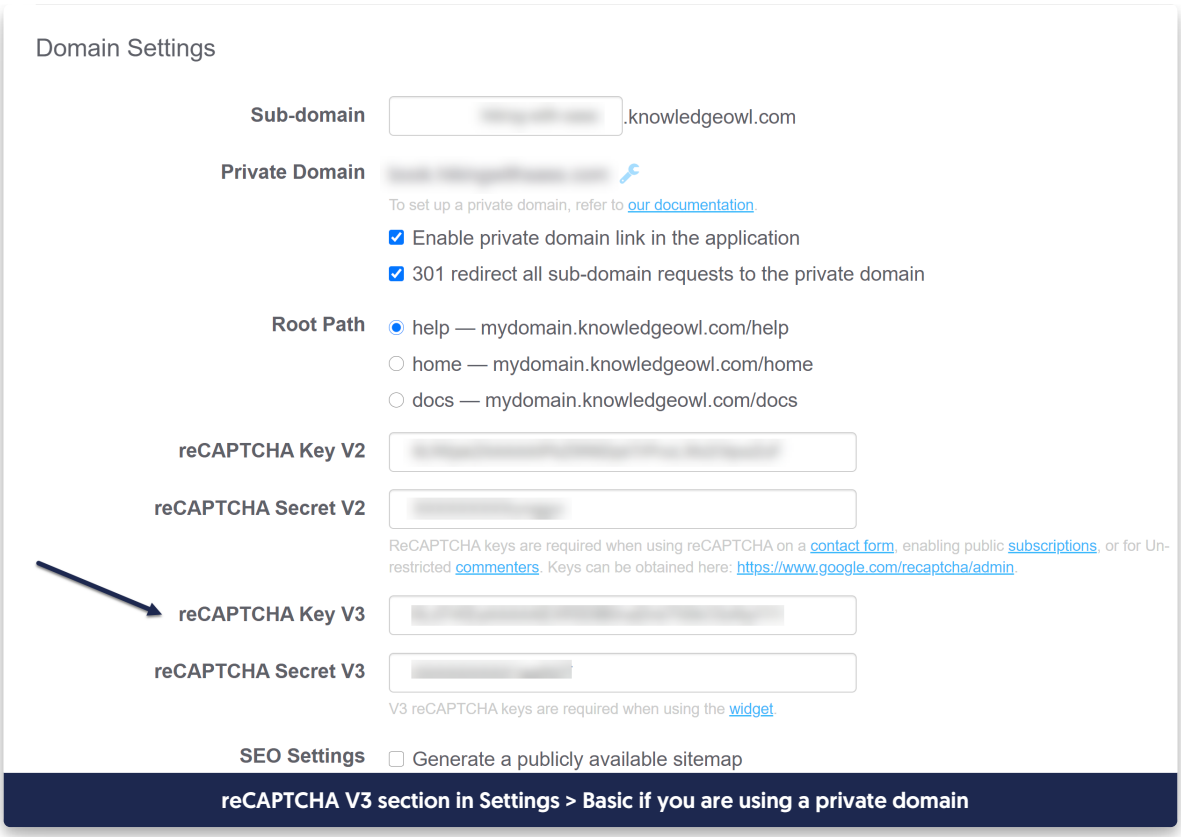
We will automatically apply reCAPTCHA to your Widget 2.0 Contact tab whenever the **Require ReCaptcha "I'm not a robot" validation to submit a ticket** box is checked in **Knowledge Base > Contact Form**.

If you have these settings selected, you should now see the reCAPTCHA statement in the screenshot above in your widget's Contact tab.

Customers with private domains

If you are using the above settings with your own domain (like help.owlsareawesome.com), you will need to add your own V3 reCAPTCHA key and secret to leverage this feature.

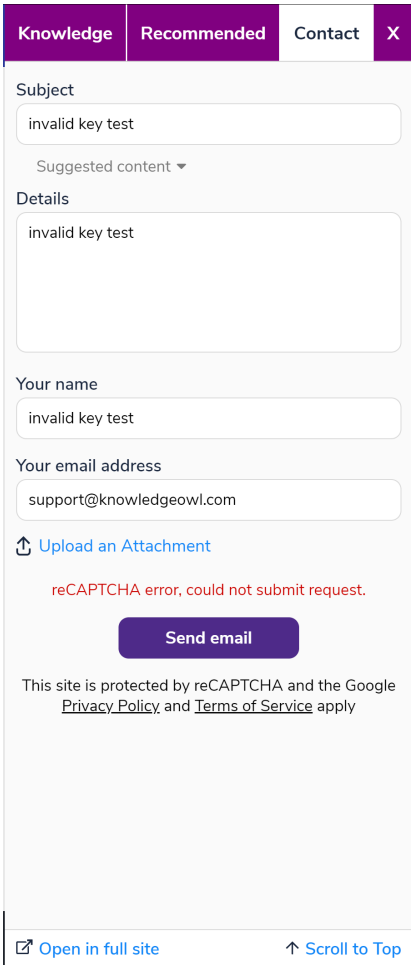
You'll see the V3 reCAPTCHA settings just below the existing V2 reCAPTCHA settings in **Settings > Basic**, and you can follow the same process for adding a V3 reCAPTCHA as outlined in Add reCAPTCHA.



If the Contact Form is set to require reCAPTCHA and you have not yet entered a V3 reCAPTCHA key, don't worry! Your widget Contact tab will still work. In this state, you just won't see the reCAPTCHA statement in the footer (and you'll have no reCAPTCHA protections).

Once you add a V3 reCAPTCHA key and secret, the footer statement will appear in your widget Contact tab and contact form submissions through the tab will be under that reCAPTCHA's protection.

The only other issue widget users might see is if you have entered an invalid V3 reCAPTCHA key/secret. If this happens, once your readers click the Contact tab submit button, we throw an error message above the submit button and don't allow them to submit:



To summarize, here are the various configuration options and what you need to do:

reCAPTCHA enabled in Knowledge Base > Contact Form?	Knowledge base domain	Settings > Basic v3 key/secret status	Widget end-user experience	Contact tab protected by reCAPTCHA?
No	KO subdomain or private domain	N/A	No different; tab submits	No
Yes	KO subdomain	N/A; key/secret automatically applied	Contact tab displays reCAPTCHA footer statement; tab submits	Yes
Yes	Private domain	No key/secret added	No different; tab submits	No
Yes	Private domain	Valid key/secret added	Contact tab displays reCAPTCHA footer statement; tab submits	Yes
Yes	Private domain	Invalid key/secret added	Contact tab displays reCAPTCHA statement; reCAPTCHA error thrown when reader tries to submit	Yes, but submissions are prevented

Open widget to a specific article or category

Last Modified on 05/29/2024 5:28 pm EDT

Some customers like to be able to open the widget directly to a specific article or category. The steps for each are quite similar.

To open the widget to a specific article, you'll need to use two methods:

- `_ko19.openArticle('article-identifier');` -- this loads the specific article you want into the widget. For the *article-identifier*, you can use one of two options:
  - The article's relative **permalink** (for example, for this article, it would be `open-widget-to-a-specific-article`)
  - The article's **ID** (found by opening the article in edit mode: the ID is the number that comes after /aid/ in the URL)
- `_ko19.open();` --this call opens the widget

Using only the openArticle method will prime the widget to open to a specific article the next time it's opened by your reader.

Similarly, to open the widget to a specific category, you'll need to use two methods:

- `_ko19.openCategory('category-identifier');` -- this loads the specific article you want into the widget. For the *category-identifier*, you can use one of two options:
  - The category's relative **permalink** (for example, for the Widget 2.0 category, it would be `widget-20`)
  - The category's **ID** (found by opening the category in edit mode: the ID is the number that comes after /cid/ in the URL)
- `_ko19.open();` --this call opens the widget

A good way to use these methods is on a specific hyperlink in your documentation, to open the widget to a specific article. In this case, you'll insert a hyperlink with an empty URL, and add two onclick events--one for each of the methods above.

So, for example, this link opens the widget directly to the article you're reading right now. Here's the code for it:

```
<a href="#" name="" onclick="_ko19.openArticle('open-widget-to-a-specific-article'); _ko19.open();return false;" title="
```

So, for example, this link opens the widget directly to the Widget 2.0 category you're reading right now. Here's the code for it:

```
<a href="#" name="" onclick="_ko19.openCategory('widget-20'); _ko19.open();return false;" title="Widget 2.0">opens
```

Scrolling behavior

For the hyperlinks, you can have different scrolling behavior on the main page when the link is clicked by formatting the link differently:

- Use an `href="#"` by itself to force the main page to scroll to the top when the widget is opened, as in this link opens the widget directly to the article you're reading right now.

```
<a href="#" name="" onclick="_ko19.openArticle('open-widget-to-a-specific-article'); _ko19.open();" title="Open
```

- Use an `href="#"` with a `return false;` at the end of the onclick to prevent the scroll (as used in the examples above)
- You can also use `href=""` to achieve the no-scroll behavior:

```
<a href="" name="" onclick="_ko19.openArticle('open-widget-to-a-specific-article'); _ko19.open();" title="Open w
```

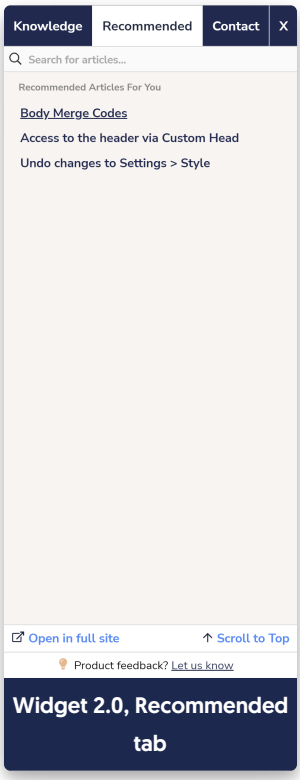
Use Widget 2.0 for Contextual Help: Recommend on Pages

Last Modified on 05/29/2024 5:28 pm EDT

Recommend On Pages allows you to provide contextual help to your readers through the embeddable Contextual Help Widget (2.0) or the API. You can provide a list of relevant articles based on the page the person opened the widget from, which may eliminate the need for them to search the knowledge base or contact you.

You can relate individual articles to pages in your knowledge base, website, or application so that they are suggested when the widget loads on the page, or you use the API to return articles for a particular page in your site. For example, if you associate articles with the "/pricing" page on your website, these articles appear when the contextual help widget is opened on that page. Alternatively, if you associate articles with the "/account" page in your application and use the API to pull articles for that page, these articles will be returned for your "/account" page.

In Widget 2.0, the Recommend on Pages will update the Recommended tab list:



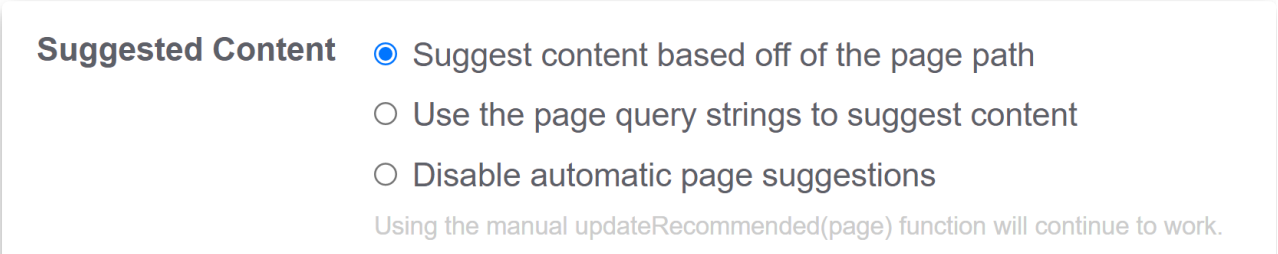
Widget 2.0, Recommended tab

In order to start using this feature, you'll need to:

- Set the Widget Settings to use the appropriate **Suggested Content** setting
- Add URLs from your main application or website to the articles or categories you'd like to recommend in the widget or API

Configuration - Widget settings

First, in **Settings > Widget**, check your widget's Admin Settings and be sure that the **Suggested Content** option best matches how your website or application is set up. This is usually a one-time set-up.



The Suggested Content options in the**Admin Settings** section

Formatting your page paths

Always use relative URLs. If we are configuring articles for https://www.knowledgeowl.com, take the portion of the URL that comes *after* that URL. For example, https://www.knowledgeowl.com/pricing becomes "/pricing". Specifically, the pathname of the URL is sent. The fragment and query string are not sent (unless you've selected the option to use query strings! Then you'd want to use query strings here.)

If your website or application includes URLs that have a variable ID field in them, you can replace that ID with {id} in your URL.

{id} only works with numeric and 24-digit hexadecimal IDs. For IDs that don't match either of those patterns, you would need to use the {custom} option via regex in **Settings > Widget** and configure custom regex rules appropriately.

You may also need to use some custom regex to handle ID values in your URLs; see the **Regex Replace URLs** section in Widget Admin Settings for more details.

Once you have the relative URL for pages you want to specify recommended articles or categories for, you can get started.

If you are using a single page application or the URLs in your website/app don't fit well within this framework, you can call a function to send a path of your choice to the widget. See Using Widget 2.0 on Single Page Applications for more information.

The interface is a little different depending on whether you're adding articles or categories, so let's look at each in turn:

Recommending Articles

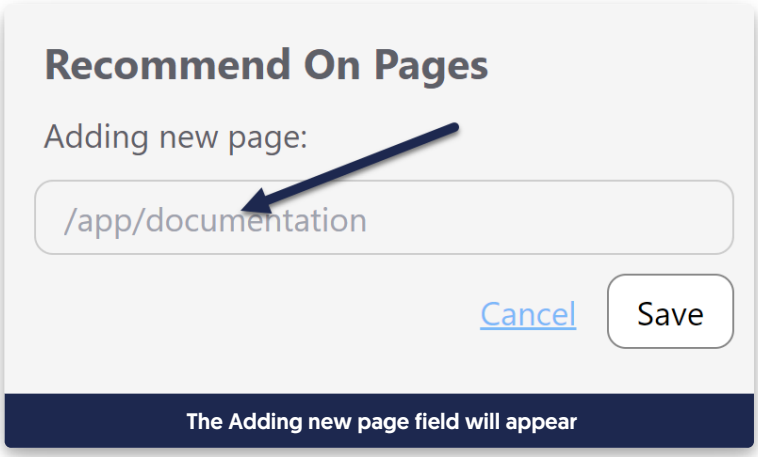
To set up an article as being recommended:

1. Open the article for editing.
2. Find the **Recommend on Pages** section in the righthand column.
3. Select **Add page** to begin adding a new page.



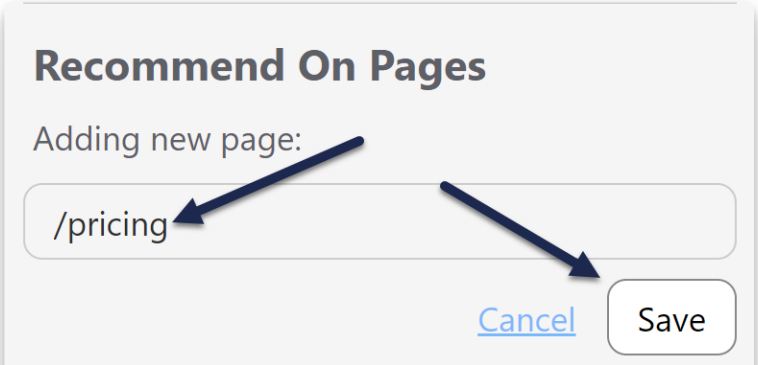
Click the Add page button to begin adding a new page path to recommend this article on

4. This will open an "Adding new page" section. Add your page path into the text field with the /app/documentation placeholder:



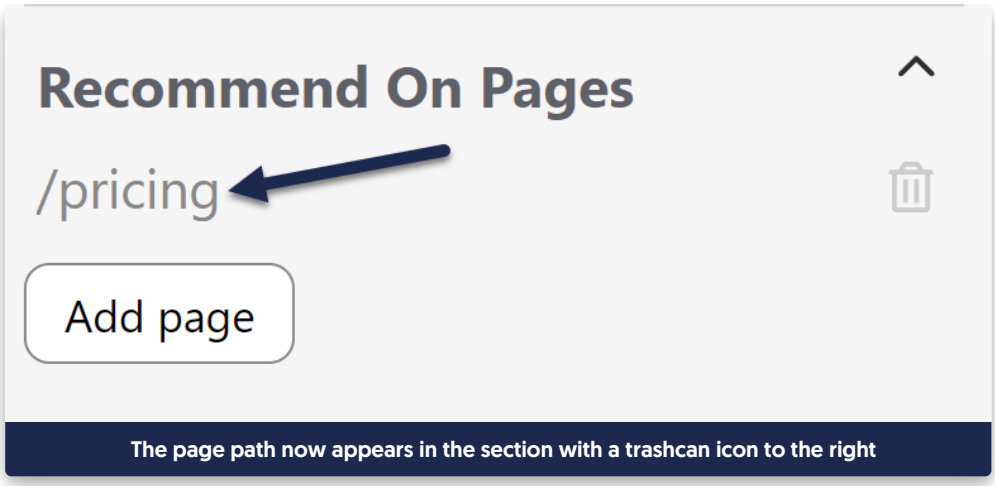
The Adding new page field will appear

5. Once you've finished adding your page path, click the **Save** button directly under it.



Add your page path into the text box and click the **Save** button directly under it

6. The interface will update to show the page path you added:



7. Repeat this process for any other pages you want to recommend this article on.

8. Be sure to **Save** your article once you're done adding paths.

Update an existing recommended article path

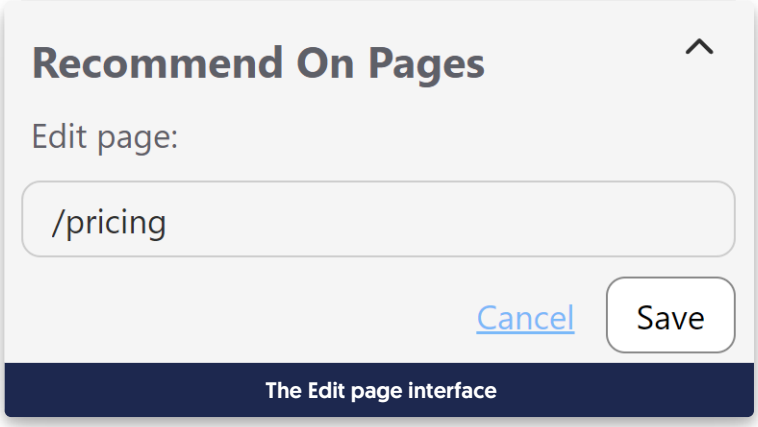
To update an existing **Recommend On Pages** path:

1. Open the article for editing.

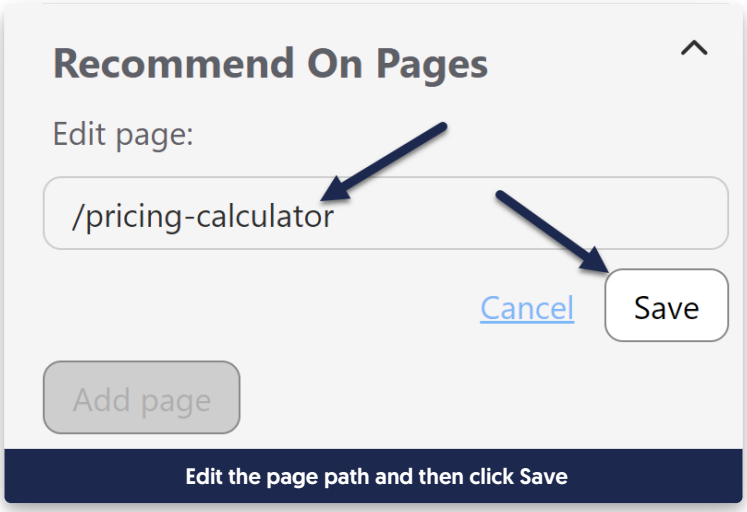
2. In the **Recommend On Pages** section, click on the text of the path you want to edit. Here, we'll edit our /pricing page path:



3. Once you click on the path, the interface adjusts to say "Edit page". You can now edit the path in the text box.



4. Once you've finished making your edits, click the **Save** button directly under the page path:

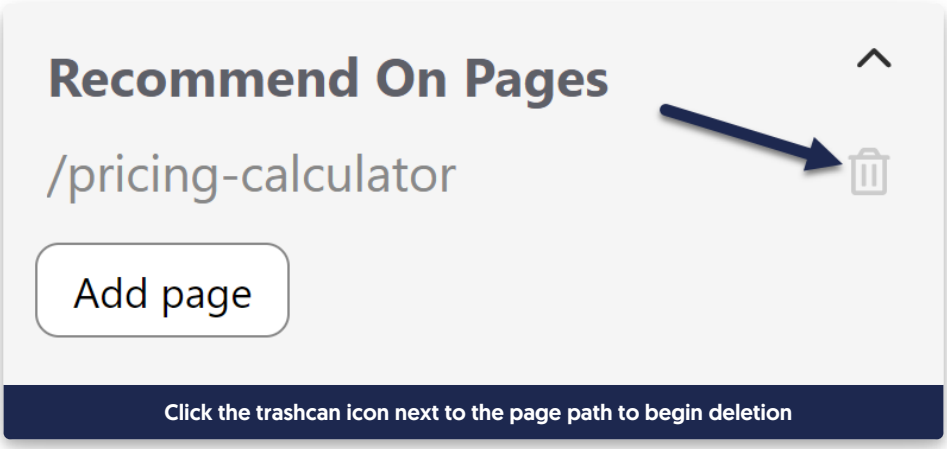


5. Be sure to **Save** your article once you're done making your edits!

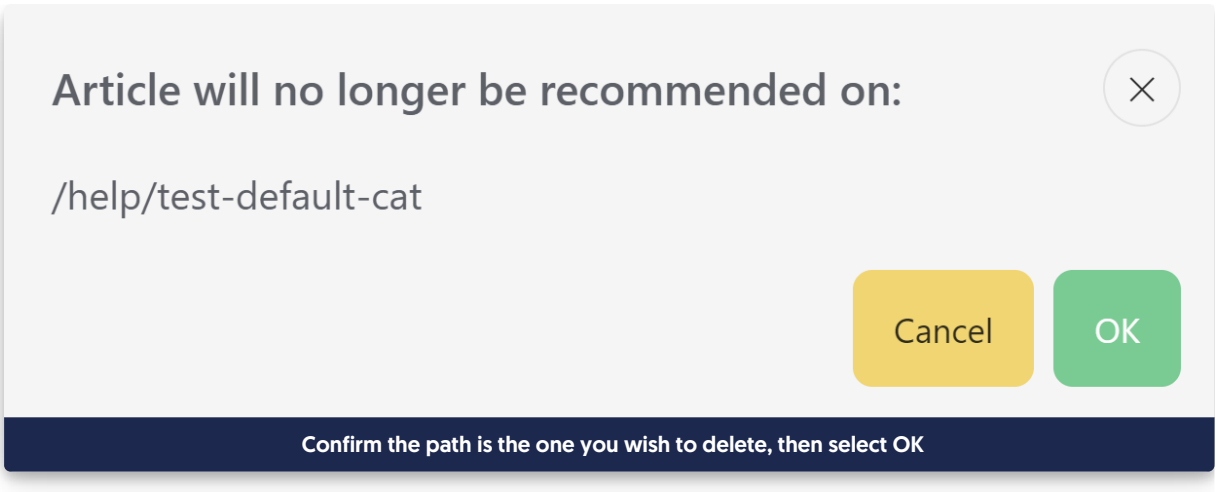
Delete an existing recommended article path

To remove a page path you no longer want to recommend this article on:

1. Open the article for editing.
2. In the **Recommend On Pages** section, click the trashcan icon to the right of the page path you want to remove:



3. In the confirmation message that appears, confirm that the page path is the one you meant to delete.
4. If it's the correct page path, click **OK** to complete the deletion.

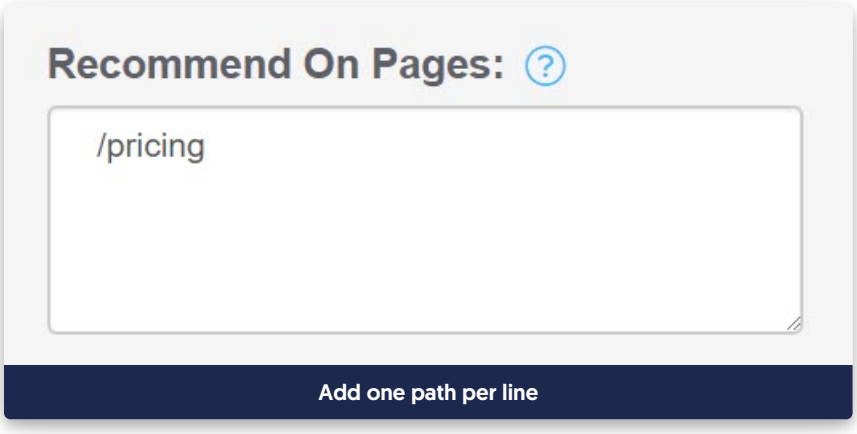


5. The interface updates to remove the path.
6. Once you're done making changes, be sure to **Save** your article!

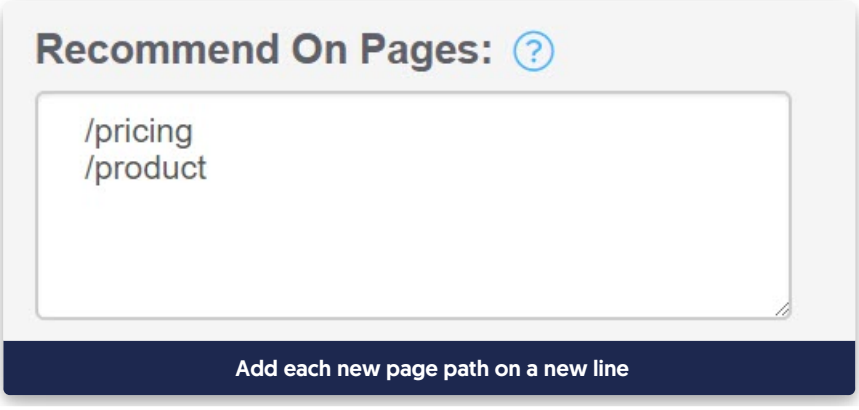
Recommending Categories

To set up a category as being recommended:

1. Open the category for editing.
2. Find the **Recommend on Pages** section in the righthand column.
3. Add the relative URL to the **Recommend On Pages** section, then select **Save.**



4. If you want this article to be recommended on multiple pages in your application or website, add each relative URL on a separate line:



5. Be sure to **Save** the article. The next time someone opens the widget from one of those pages in your site or application, it will suggest this category.

Update an existing recommended category path

To update an existing **Recommend On Pages** path in a category:

1. Open the category for editing.
2. Find the **Recommend on Pages** section in the righthand column.
3. Click in the text box there and edit the page path you want to adjust.
4. Be sure to keep each page path on its own line in the box.
5. Once you're done making edits, be sure to **Save** the article.

Delete an existing recommended category path

To remove a page path you no longer want to recommend this category on:

1. Open the category for editing.
2. Find the **Recommend on Pages** section in the righthand column.
3. Click in the text box there and delete the page path you want to adjust.
4. Be sure the remaining page paths are all on their own lines in the box.
5. Once you're done making edits, be sure to **Save** the category.

Ordering recommended articles

If you've added several recommended articles and you'd like to set the order they display in, you can change the order in by editing the article weights for that page in **Widget > Reporting**. See Recommended Article Weights for more information.

Hide one of the Widget 2.0 tabs

Last Modified on 05/29/2024 5:28 pm EDT

If you don't want to use one of the tabs in Widget 2.0, you can hide it:

1. Go to **Settings > Widget**.
2. Copy the relevant code below and paste it into the **Custom Widget Styles** section:
    a. To hide the Knowledge tab, copy and paste this code:

```
/* Hide the Knowledge tab */
.widget .widget__nav li:nth-child(1)  {
   display:none !important;
}
```

    b. To hide the Recommended tab, copy and paste this code:

```
/* Hide the Recommended tab */
.widget .widget__nav li:nth-child(2)  {
   display:none !important;
}
```

    c. The Contact tab will only display if you have enabled Contact Form in your knowledge base. If you have Contact Form enabled but you want to hide the Contact tab, copy and paste this code:

```
/* Hide the Contact tab */
.widget .widget__nav li:nth-child(3)  {
   display:none !important;
}
```

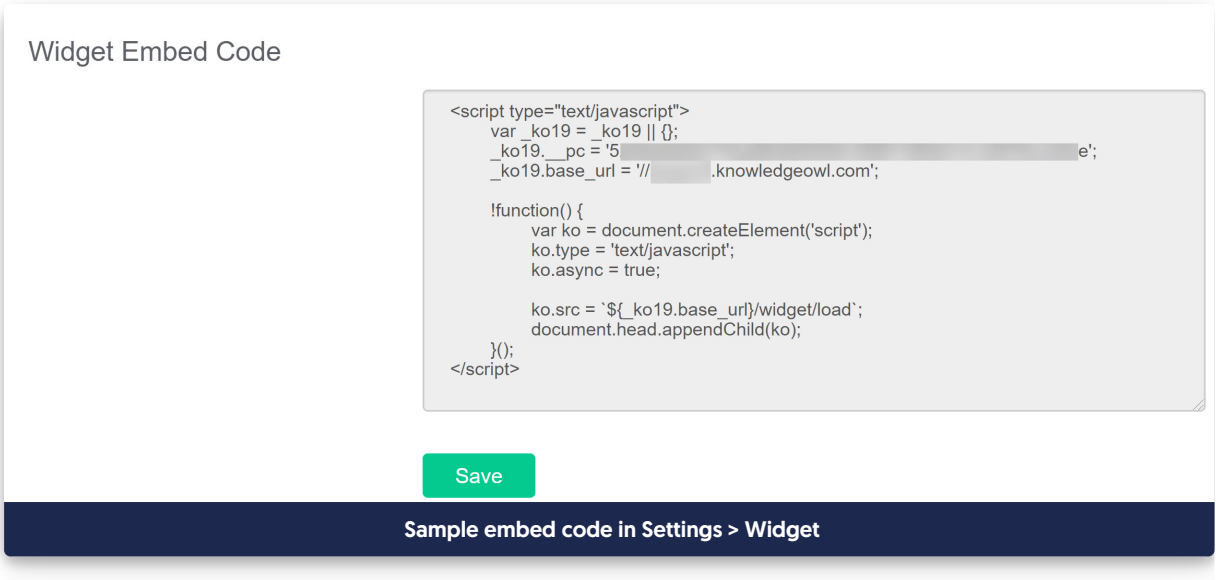
3. Be sure to **Save** your changes to the Widget settings.

Widget 2.0 installation

Last Modified on 05/29/2024 5:28 pm EDT

Once you've configured and saved your widget settings, you'll need to add the widget embed code into your website or web-based application:

1. Scroll to the bottom of **Settings > Widget**.
2. Copy the Widget Embed Code in the box at the bottom.



Sample embed code in Settings > Widget

3. Paste that embed code before the closing </body> tag in your website or application.

Depending on your configuration and requirements, you may need to perform additional setup steps, such as:

- If your knowledge base requires authentication, review whether you need to authenticate your widget and configure Oauth2 authentication or JWT authentication.
- If your knowledge base uses a private domain and is publicly available, you should consider enabling reCAPTCHA on your Contact Form to help prevent spam and potential DDoS attacks. See Protect Widget 2.0 Contact Form with reCAPTCHA for more information.
- If you are using the widget within a single page application, see Using Widget 2.0 on Single Page Applications.
- If your URLs contain IDs, figure out if you can use the built-in {id} variable (for numeric and 24-digit hexadecimal IDs) or if you need to write your own **Regex Replace URLs** regex and use the {custom} variable instead. See Widget Admin Settings for more information.
- See Advanced widget configuration & methods for additional methods you can use to further control the widget opening behavior, such as opening to specific articles or categories, opening to a specific tab, and more.

Widget authentication--when and how to use it

Last Modified on 07/10/2024 4:31 pm EDT

If you're thinking of using the embeddable web widget, you'll need to consider:

1. Whether you need authentication for the widget
2. Which type of authentication method to use

Since the answers to these question involve a few variables, here are some resources to help you determine whether you need to authenticate the widget and which type of authentication might be right for you.

Do I need to authenticate my widget?

If your knowledge base is completely public--requiring no login to view any content--you do not need to authenticate your widget.

If your knowledge base requires a login to view some or all of the content, you generally do need to authenticate the widget.

If your knowledge base restricts content to specific reader groups and you want some or all of the groups' content to display, you'll need to pass along group membership in the authentication.

Here are the most common knowledge base configurations and whether you'll need to authenticate your widget for each:

Knowledge Base Type	Is authentication required?	Unauthenticated Widget	Group membership included with authentication?	Authenticated Widget
Public KB (no login required for any content)	No	All content shows in the widget	N/A	Not necessary (but all content will show)
Public KB with some restricted content requiring login	No, if you want it to display public content only Yes, if you want it to display restricted content	Only the public content shows	Necessary to display restricted content appropriately	All public content + all restricted content for the relevant groups shows

Knowledge Base Type	Is authentication required?	Unauthenticated Widget	Group membership included with authentication?	Authenticated Widget
Private KB (requires login to access KB) but no reader group restrictions on specific content	Yes	Widget will open but shows an endless spinner with no content	Not necessary	All content will show
Private KB (requires login to access KB) with some or all content restricted to specific reader groups	Yes	Widget will open but shows an endless spinner with no content	Necessary to display restricted content appropriately	All unrestricted content + all restricted content for the relevant groups shows

Which type of authentication do I need?

We offer two types of authentication for Widget 2.0:

- JSON Web Token (JWT)
- OAuth2

Either authentication mechanism may be used.

However, JWT payloads are not encrypted, so if you consider any of the information you're passing along in the authentication to be sensitive data (such as reader email addresses, reader groups, etc.), you should use OAuth2.

Will an authenticated widget work in all browsers?

Generally, yes, but some browsers disable cookies by default. (We're looking at you, Safari, though some IT policies will also restrict cookie usage.)

In browsers with cookies enabled, you'll see the full widget functionality when the widget is authenticated.

In browsers with cookies disabled, you'll see nearly full widget functionality when the widget is authenticated. The one exception to this is the "Open in full site" link in the footer. This action is cookie-dependent so the link won't be displayed at all when someone accesses your authenticated widget through a browser with cookies disabled.

Use Cases

Mixture of public and private

One of Linus's knowledge bases has mostly public documentation, in the form of product support documentation, with a few restricted articles containing internal support documentation.

If Linus is embedding the widget into his end-product, so it's being opened mainly by customers--who only normally see the public documentation--he can use an unauthenticated widget here. The widget will only pull the public documentation.

If, however, Linus wants to embed the widget into his help ticketing system so that his customer support staff can access it from there, he'd want to use an authenticated widget that opens the widget as the Internal Support reader group, so the support staff would see both the public content and the restricted internal support content.

Login required, but all content visible

One of Linus's knowledge bases is designed for his enterprise clients, to provide additional information to them. This requires login, since he wants only specific clients to have access and he doesn't want the documentation available to the general public. But he doesn't restrict or segregate the content in any way.

Linus is embedding the widget in his enterprise application's homepage, which is only accessed by enterprise customers. He wants the entire knowledge base to be accessible in the widget.

Linus can set up the widget with either JWT or OAuth2 authentication to show all enterprise customers the same content. The authentication script won't need to pass in group membership because there is none.

Specific reader restrictions

One of Linus's other knowledge bases is completely private, containing internal policies and procedures. Besides requiring a login, the content is also heavily segregated by reader groups, so that HR only sees HR documentation; compliance only sees compliance and regulatory docs; and so on.

Linus is embedding the widget into his company's intranet portal, and he still wants the reader group restrictions to be enforced. His knowledge base uses Single Sign-On integration, so the login his coworkers use on the portal is also their login for the knowledge base. For this widget, he can use either JWT or OAuth2 authentication and pass the reader groups along with the authentication, so the widget knows which portions of content it should display to each reader.

If he has security concerns around passing email address, reader group names, or other sensitive data to the client as part of authentication, he should use OAuth2.

Widget 2.0 JWT authentication

Last Modified on 05/29/2024 5:28 pm EDT

When using the widget with private knowledge bases, or knowledge bases that have restricted content that you want your customers to be able to access, SSO authentication is required.

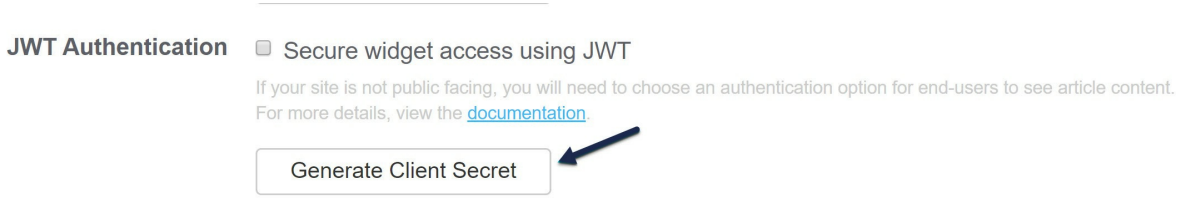
To implement SSO authentication for your readers in the widget, you may choose between **OAuth2** or **JSON Web Tokens (JWT)**.

With JWT authentication, you'll need a JWT client secret to retrieve the token, and your widget embed script will need to request the token to authenticate and display knowledge base content to your readers.

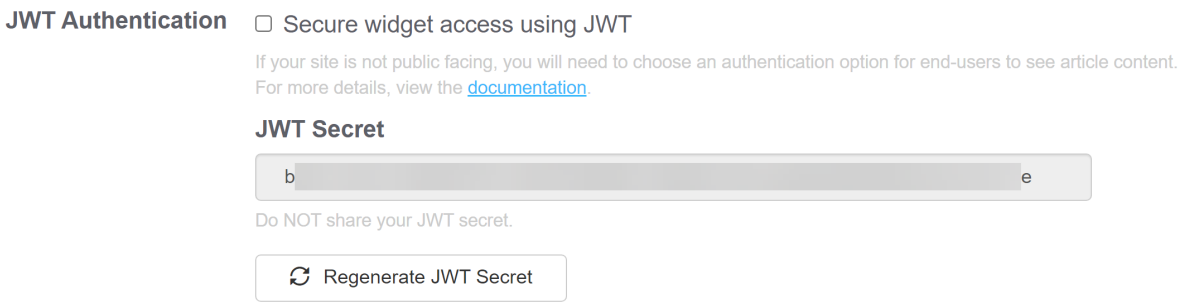
Generate client secret

To retrieve a JWT token, you will first need to generate the Client Secret for your knowledge base:

1. Go to **Settings > Widget**.
2. Scroll to the **Admin Settings** section.
3. In the **JWT authentication** subsection, click the button to Generate Client Secret.



4. Once you click this button, your Client Secret will be populated.



Now that you have your client secret, you can use it to request an access token from the JWT token endpoint. We recommend modifying the default embed script to include a section that will call the `_ko19.onReady` method and get the token within that method. See below for overall workflow examples and a sample call to this method.

Working with JWT authentication

For information about what JWT is and how you can use it, you can refer to this JWT introduction article. For use with the widget, please refer to the following requirements:

JWT header

```
// Encryption algorithm must be HS256
{
 "alg": "HS256",
 "typ": "JWT"
}
```

JWT payload



JWT payloads are not encrypted and should NOT INCLUDE any sensitive information about the reader.
If you need to pass sensitive information about your readers, use the server side OAuth2 workflow.

```
{
 "iss" => "app.knowledgeowl.com", // Issuer - *required
 "aud" => "YOUR.KNOWLEDGEBASE.URL", // Audience - *required
 "iat" => unixTimestamp, // Issued At - *required
 "nbf" => unixTimestamp - 1000, // Not Before - *required
 "exp" => unixTimestamp + 1000, // Expires - *required
 "reader_ssoid" => endUserUID, // Unique ID - *required
 "reader_username" => endUserEmail, // Email or Username - *required
 "reader_groups" => "Support,Admin" // Comma separated list of reader group names - optional
}
```

Example authentication code

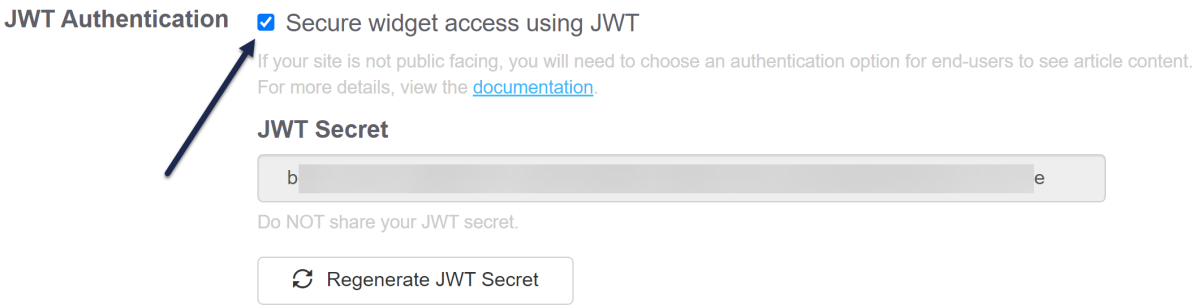
```
var _ko19 = _ko19 || {};
_ko19.__pc = '123xxxxxx-123xxxxxxx';
_ko19.base_url = '//yourkb.knowledgeowl.com';
!function() {
 var ko = document.createElement('script');
 ko.type = 'text/javascript';
 ko.async = true;

 ko.src = `${_ko19.base_url}/widget-app/assets/js/load.js`;
 document.head.appendChild(ko);

 /**
  * The widget is loaded and ready to receive commands
  */
 _ko19.onReady = function () {
  // Get the JWT token and pass it to the widget
  getToken();
 }

 /**
  * Form the authentication object and pass it to the widget for authentication
  */
 getToken = function() {
```

```
  /** Example of hitting an endpoint to get the JWT token **/
  /*
    $.get('my.jwtendpoint.url', function(response){
      if(response.token) {
 var JWT = response.token;
}
    });
  */

  /** Example where the JWT already exists on the page **/
  var JWT = preDefinedVar; // 'eyJ0.eyJpc3Mi.dKSb41xr' - Example of shortened value for JWT
  var authToken = {'type': 'jwt', 'token': JWT};

  // Use the formed object with the JWT to authenticate
  authWidget(authToken);
 }

 /**
  * The widget will pass the response back from the authentication call here.
  * This can be useful for debugging purposes if any errors occur
  */
 _ko19.onAuthResp = function(response) {
  // Take some kind of action if the authentication fails
  if(response.error)
    console.log(response);
 }

 /**
  * The widget will call this function whenever authorization fails
  * This can occur before the user is logged in, and after the authentication expires
  * With most workflows, you will want to re-authorize the end-user
  * when this event occurs
  */
 _ko19.onAuthError = function () {
  // Take an action when the user is not logged in
  getToken()
 }

 /**
  * Pass your token as JSON into the widget's authenticate function
  * the JSON format should be as follows:
  * {'type': 'jwt|oauth', 'token': token_value}
  */
 authWidget = function(authToken) {
  _ko19.authenticate(authToken);
 }
}();
```

Enable JWT

When your script is ready for testing/usage, set the widget to use JWT authentication:

1. **Go to Settings > Widget.**
2. **Scroll to the Admin Settings section.**
3. **In the JWT authentication subsection, check the box next to "Secure widget access using JWT".**



4. **Save** the settings.

Generate a new JWT secret

For security reasons, sometimes you may want to generate a new JWT secret. You can do this directly yourself in Settings > Widget.

Once you regenerate the JWT secret, the existing JWT secret will no longer function, so your widget authentication will basically be broken until you update it to use the new secret.

To regenerate your secret:

1. **Go to Settings > Widget.**
2. **Scroll to the Admin Settings section.**
3. **In the JWT Authentication subsection, click the Regenerate JWT Secret button.**
4. **This will open a pop-up confirmation to ensure you want to make this change. As the message states, regenerating the secret will invalidate the old secret (which basically breaks your existing widget authentication until you update it to use the new secret).**



Confirmation message for regenerating your JWT secret

5. **To proceed with regenerating the secret, select Regenerate.**

6. **The pop-up will disappear and your new JWT secret will be displayed.**

You can now update your authentication scripts/processes to use that secret instead.

Widget 2.0 OAuth2 authentication

Last Modified on 05/29/2024 5:28 pm EDT

When using the widget with private knowledge bases, or knowledge bases that have restricted content that you want your customers to be able to access, SSO authentication is required.

To implement SSO authentication for your readers in the widget, you may choose between **OAuth2** or **JWT**.

To use OAuth2, you'll need to generate a client ID and secret within KnowledgeOwl, and your widget embed script will need to use that secret to authenticate and display knowledge base content to your readers.

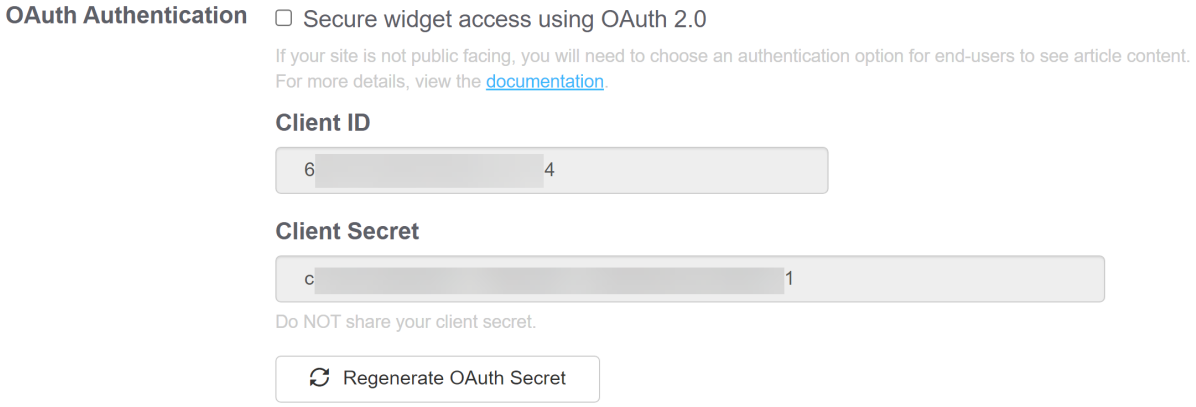
Generate Client Secret

To retrieve an OAuth2 token, you will first need to generate the Client Secret for your knowledge base:

1. Go to **Settings > Widget**.
2. Scroll to the **Admin Settings** section.
3. In the **OAuth authentication** subsection, click the button to Generate Client Secret.



4. Once you click this button, your Client Secret and Client ID will be populated.



Now that you have your client secret and client ID, you can use them to request an access token from the OAuth token endpoint. We recommend modifying the default embed script to include a section that will call the `_ko19.onReady` method and get the token within that method. See below for overall workflow examples and a sample call to this method.

Request Token

```
//curl request for token with reader information
curl -u clientID:clientSecret https://app.knowledgeowl.com/oauth2/token
-d "grant_type=client_credentials&reader[ssoid]=UID&reader[username]=reader@mysite.com&reader[groups]=Group1
```

Example Response

```
{"access_token":"12345678909876543212345678909876543212345",expires_in":3600,"token_type":"Bearer","scope":r
```

Widget Embed Code Example

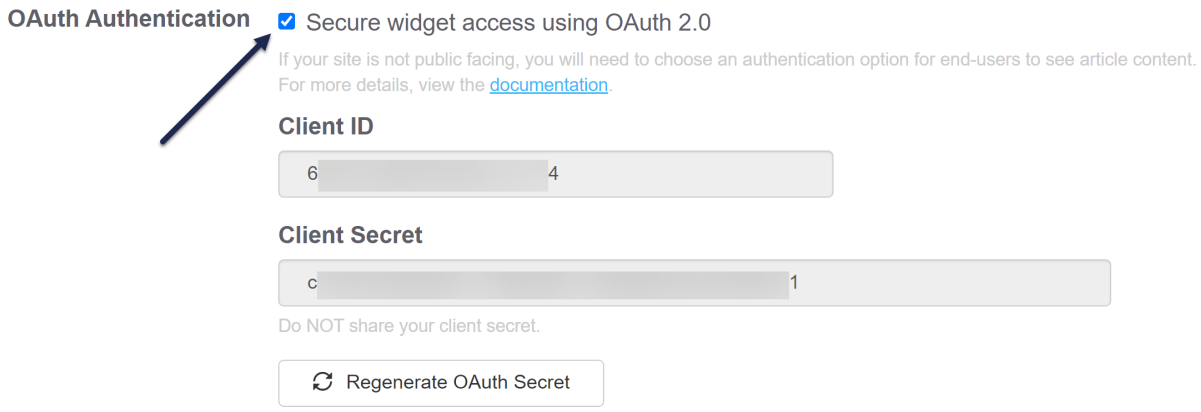
```
var _ko19 = _ko19 || {};
_ko19.__pc = '123xxxxxx-123xxxxxxx';
_ko19.base_url = '//yourkb.knowledgeowl.com';

!function() {
  var ko = document.createElement('script');
  ko.type = 'text/javascript';
  ko.async = true;

  ko.src = `${_ko19.base_url}/widget-app/assets/js/load.js`;
  document.head.appendChild(ko);

  /**
   * The widget is loaded and ready to receive commands
   */
  _ko19.onLoad = function () {
    // Retrieve the OAuth2 token from a server side endpoint
    getToken();
  }

  /**
   * Form the authentication object and pass it to the widget for authentication
   */
  getToken = function() {
    // Get the OAuth2 token from a server side endpoint
    $.get('my.oauth2.endpoint', function(response){
      if(response.token) {
        // Example value for response.token = '12345678909876543212345678909876543212345'
        var authToken = {'type': 'oauth', 'token': response.token};

    // Send the object for authentication
        authWidget(authToken);
      }
    });
  }

  /**
   * The widget will pass the response back from the authentication call here.
   * This can be useful for debugging purposes if any errors occur
   */
  _ko19.onAuthResp = function(response) {
    // Take an action of the authentication fails
    if(response.error)
      console.log(response);
  }
```

```
  /**
   * The widget will call this function whenever authorization fails
   * This can occur before the user is logged in, and after the authentication expires
   * With most workflows, you will want to re-authorize the end-user
   * when this event occurs
   */
  _ko19.onAuthError = function () {
    console.log("not authorized trigger");
  }

  /**
   * Pass your token as JSON into the widget's authenticate function
   * the JSON format should be as follows:
   * {'type': 'jwt|oauth', 'token': token_value}
   */
  authWidget = function(authToken) {
    _ko19.authenticate(authToken);
  }
}();
```

Enable OAuth

When your script is ready for testing/usage, set the widget to use OAuth authentication:

1. **Go to Settings > Widget.**
2. **Scroll to the Admin Settings section.**
3. **In the OAuth authentication subsection, check the box next to "Secure widget access using OAuth2".**



4. **Save the settings.**

Regenerate OAuth Secret

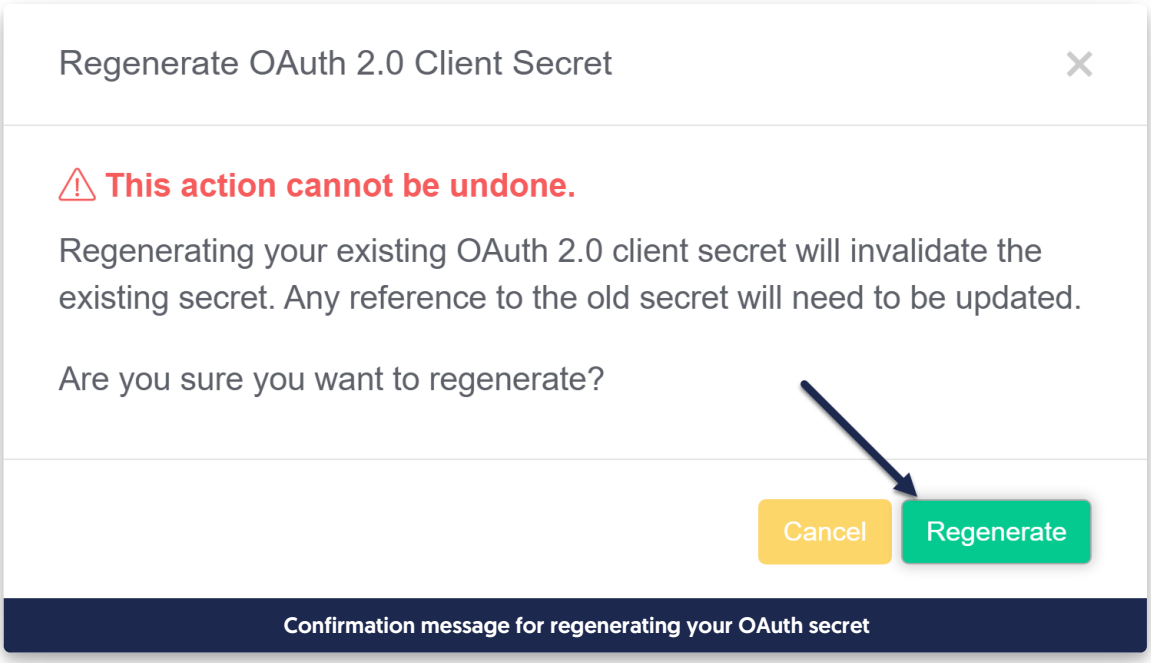
For security reasons, sometimes you may want to generate a new OAuth secret. You can do this directly yourself in Settings > Widget.

Once you regenerate the OAuth secret, the existing OAuth secret will no longer function, so your widget authentication will basically be broken until you update it to use the new secret.

To regenerate your secret:

1. **Go to Settings > Widget.**

2. Scroll to the **Admin Settings** section.
3. In the **OAuth Authentication** subsection, click the **Regenerate OAuth Secret** button.
4. This will open a pop-up confirmation to ensure you want to make this change. As the message states, regenerating the secret will invalidate the old secret (which basically breaks your existing widget authentication until you update it to use the new secret).



Confirmation message for regenerating your OAuth secret

5. To proceed with regenerating the secret, select **Regenerate**.
6. The pop-up will disappear and your new OAuth secret will be displayed.

You can now update your authentication scripts/processes to use that secret instead.

Open widget to specific tab

Last Modified on 05/29/2024 5:28 pm EDT

By default, the widget will:

- Open to the Recommended tab if there are any recommended articles for the current page
- Open to the Knowledge tab if there are no recommended articles for the current page

You can open the widget to a specific tab every time by using one of these methods:

- `_ko19.loadContact();` - will open directly to Contact tab
- `_ko19.loadKnowledge();` - will open directly to the Knowledge tab
- `_ko19.loadRecommended();` - will open directly to the Recommended tab

There are two ways to use these methods:

1. You can call them **onOpen**, which means a reader still has to click to open the widget but once they do, that tab will load. Here's a sample that will open the widget to the Contact tab when it's opened:

```
_ko19.onOpen = function() {
    _ko19.loadContact();
}
```

2. You can call them **onLoad**, which effectively opens the widget as soon as the page loads, open to that tab.



Note: this will force the widget to open *as soon as the page loads.* If you want readers to have to click a button or link to open the widget, don't use this method.

Here's a sample that will open the widget to the Recommended tab when the page loads:

```
_ko19.onLoad = function() {
    _ko19.loadRecommended();
}
```

In either case, you'll add the onLoad or onOpen call into the Widget embed script between the end of the last default function and the closing </script> tag. For example:

```
<script type="text/javascript">
   var _ko19 = _ko19 || {};
   _ko19.__pc = '5xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxa';
   _ko19.base_url = '//test.knowledgeowl.com';

   !function() {
      var ko = document.createElement('script');
      ko.type = 'text/javascript';
      ko.async = true;

      ko.src = `${_ko19.base_url}/widget-app/assets/js/load.js`;
      document.head.appendChild(ko);
   }();

    _ko19.onOpen = function() {
      _ko19.loadContact();
   }
</script>
```

Use Widget 2.0 on Single Page Applications

Last Modified on 05/29/2024 5:28 pm EDT

The Problem

If you've set up "Recommend on Pages" for contextual help, by default, when a reader navigates to a new page, the widget grabs that URL and uses it to suggest content in the Recommended tab. This method works fine for applications that use full page reloads during navigation.

However, for **single page applications** this is not the case. In **single page applications**, the reader might have navigated to an entirely new area of your application, and while the URL may reflect that, the page never fully reloads. Thus, neither does the widget. This can result in confusion when the reader opens the widget, since the suggested articles may relate to the first page they saw instead of the page they're currently looking at.

The Solution

To solve this problem, you can call a widget method to proactively tell the widget that the current URL has changed:

```
//method to update the current URL used for contextual help
_ko19.updateRecommended('currentUrl');
```

If you're using this method repeatedly in a Single Page Application, we recommend calling _ko19.reset(); before updateRecommended to clear out whatever's been previously loaded in the widget.

Example Usage

```
var _ko19 = _ko19 || {};
_ko19.__pc = 'xxxxxxxxxxx-xxxxxxxxxxxxx';
_ko19.base_url = '//mykb.knowledgeowl.com';

!function() {
 var ko = document.createElement('script');
 ko.type = 'text/javascript';
 ko.async = true;

 ko.src = _ko19.base_url + '/widget/load';
 document.head.appendChild(ko);

 // Called when the widget is toggled open
 _ko19.onOpen = function () {
  var currentPage = 'some-page';
  _ko19.updateRecommended(currentPage);
 }
}();
```

Other Reasons for Using This Method

Even if your application is not a single page application, your app's URLs may be constructed in a way that make it very difficult to utilize the "Recommend on Pages" feature.

Another benefit of the _ko19.updateRecommended function is that it can accept any string value as the "currentUrl" parameter. This allows you to use a single word or any other format you wish in place of the actual URL. Take a look at the below examples:

Complex URLs to Simple One Word Location

Let's say that you have an application URL that looks like this:

```
https://myapp.com/app/users/edit-user/abcd123354/id/123151ajsdfa?p=12sdfsd12&q=12154aba
```

By default, the following is what gets sent as the current location to the widget:

```
/app/users/edit-user/abcd123354/id/123151ajsdfa
```

If we leave this as is, we would need to use regex to make sure that the ID portions of the URL get genericized so that we wouldn't need to add a "Recommend On Pages" URL for every single ID possible. So what we'd need to add to articles in the Recommend On Pages section would look some thing like this:

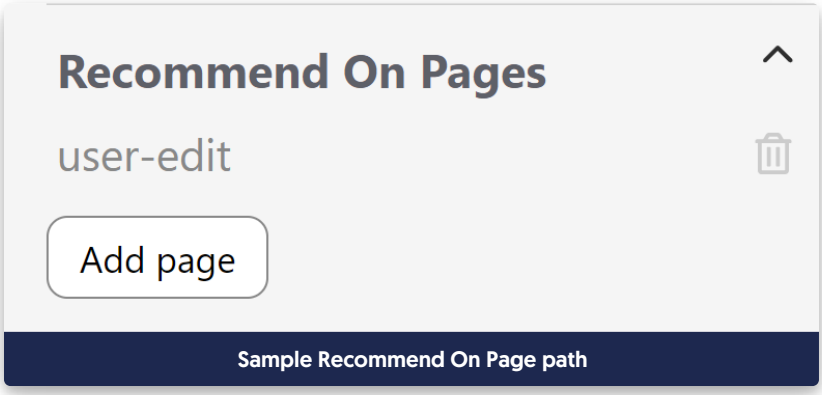
```
/app/users/edit-user/{custom}/id/{custom}
```

While that will work, it is still a fairly complex way to essentially say that we want certain articles to appear when people are looking at the "edit-user" screen. By using the "updateRecommended" method, we can dramatically simplify this like so:

```
//define current page and send to widget
var currentUrl = 'user-edit';
_ko19.updateRecommended(currentUrl);
```

Once we've done that, we can tell our KnowledgeOwl authors that if they want a certain article to appear as

recommended on the "user-edit" pages in the widget, they can add the string "user-edit" to the "Recommend On Pages" text box like so:



Sample Recommend On Page path

Much simpler than adding `/app/users/edit-user/{custom}/id/{custom}`!

Dealing with More Complex Page Paths

You might find that you need to be more specific with which page a reader is looking at. Let's look at the following URLs for example:

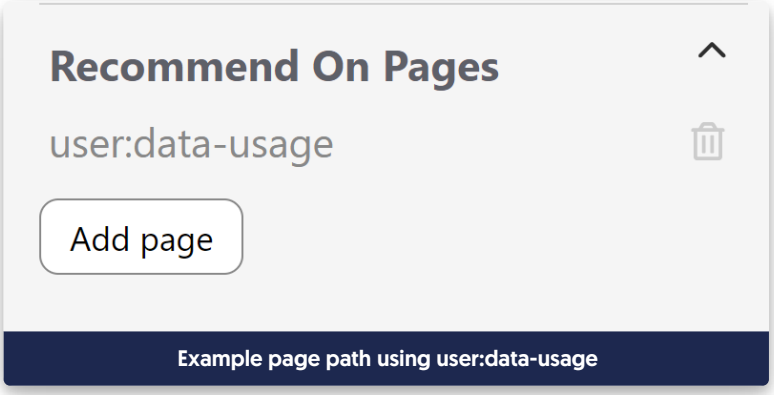
`https://myapp.com/app/users/user/id/123123abasd/reports/data-usage`
`https://myapp.com/app/account/id/asdfksa1233123/reports/data-usage`

Both of these URLs are referencing a page that shows a report of "data-usage". However, one of the URLs is referencing the data usage for a single user while the other is referencing the overall data usage for the entire account. If we were to only pass over "data-usage" as the current page, this could cause confusion with the content that gets recommended within the widget.

Because the "**updatePageLoc**" function is flexible and accepts any string value, we can handle this in whatever way will make the most sense to our KO authors. For example, we could send the current page location like so:

```
//Page: https://myapp.com/app/users/user/id/123123abasd/reports/data-usage
var currentUrl = 'user:data-usage';
_ko19.updateRecommended(currentUrl);

//Page: https://myapp.com/app/account/id/asdfksa1233123/reports/data-usage
var currentUrl = 'account:data-usage';
_ko19.updateRecommended(currentUrl);
```

We can then tell our KnowledgeOwl authors to make sure they specify the **section** of the app followed by a ":" followed by the **page** of the app when using the "Recommend On Pages" text area:



Example page path using user:data-usage

This flexibility allows you to come up with a naming convention that will make sense to both the developers that install the widget and the people who are actually writing the documentation.

Example Usage

Extremely simple example HTML page for `https://myapp.com/app/users/user/id/123123abasd/reports/data-usage` where the "**currentUrl**" value is passed to the view via the controller or it is populated in some other way dynamically:

```
<!DOCTYPE html>
<html>
 <head>
  <title>Data Usage Report for John Smith</title>
 </head>
 <body>
  <!-- is passed to view via the controller or otherwise populated dynamically -->
  <input type="hidden" id="currentUrl" value="">
 </body>
</html>
```

The below code uses the value of the HTML element "#currentUrl" that we populated above:

```
!function() {
 var ko = document.createElement('script');
 ko.type = 'text/javascript';
 ko.async = true;

 ko.src = _ko19.base_url + '/widget/load';
 document.head.appendChild(ko);

 // Called when the widget is toggled open
 _ko19.onOpen = function () {
  var currentPage = document.getElementById('currentUrl').value;
  _ko19.updateRecommended(currentPage);
 }
}();
```

Prepopulate Widget 2.0 Contact Form fields

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If your readers are already authenticated through OAuth or JWT, their name and email address will automatically be prepopulated in the Contact Form fields.

If they aren't already authenticated, you can add some code to prepopulate some of the contact form fields. This can be useful if you'd like to add your reader's name or email address to the form automatically, so they don't have to fill it out.

To do so, you'll use the updateContact method, and specify values from your application to populate the name and/or email fields:

- `_ko19.updateContact({name: '*Sample Name*', email: '*Sample email*' });`

As with other Widget 2.0 methods, this can be a good method to call from within the _ko19.onLoad or _ko19.onOpen functions, which can be tucked in with your full widget embed script or run separately.

1. **onOpen** means that once the reader opens the widget, their info will be populated into the contact form fields:

```
_ko19.onOpen = function() {
    _ko19.updateContact({name: 'My Name', email: 'My email'});
}
```

2. **onLoad** will add the reader's contact form details into the widget when the page loads:

```
_ko19.onLoad = function() {
    _ko19.updateContact({name: 'My Name', email: 'My email'});
}
```

You can choose to add either function into the overall widget embed script, as below, or run them separately:

```
<script type="text/javascript">
   var _ko19 = _ko19 || {};
   _ko19.__pc = '5xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxa';
   _ko19.base_url = '//test.knowledgeowl.com';

   !function() {
      var ko = document.createElement('script');
      ko.type = 'text/javascript';
      ko.async = true;

      ko.src = `${_ko19.base_url}/widget-app/assets/js/load.js`;
      document.head.appendChild(ko);
   }();

    _ko19.onLoad = function() {
      _ko19.updateContact({name: '<i>My Name</i>', email: '<i>My email</i>'});
   }
</script>
```

Advanced option: add the widget in your own div wrapper

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Only use this option if you have your own developer resources; our support team will not help set up custom wrapper installations. For further customizations to widget size, behavior, and functioning, we recommend creating your own widget leveraging our API, rather than the pre-built widget.

Out of the box, the Widget 2.0 code will open the widget in a div on the righthand side of the page, overlying the content there in a div that runs the full height of the screen.

If you have top navigation or some other layout that this full-height righthand behavior isn't ideal, you have the option to specify your own wrapper div for the widget. You can then size and place that div directly, giving you better control over height and placement.

Please note: the wrapper **will not change** the width of the widget; that is always set to 370px.

To identify the wrapper, add a variable for _ko19.containerId to the widget embed code below the base_url, and provide the id of the div you'd like to use:

```
_ko19.containerId = "my-custom-div-id";
```

For example, here, I've referenced a div with the ID of "widget-custom":

```
<script type="text/javascript">
    var _ko19 = _ko19 || {};
    _ko19.__pc = '00000000000000000000-11111111111111111111111111';
    _ko19.base_url = 'https://myknowledgebase.knowledgeowl.com';
    _ko19.containerId = "widget-custom";

    !function() {
        var ko = document.createElement('script');
        ko.type = 'text/javascript';
        ko.async = true;

        ko.src = _ko19.base_url + '/widget/load';
        document.head.appendChild(ko);
    }();
</script>
```

Sample usage of the _ko19.containerID

You'll need to be sure that div exists on the site where you're embedding the widget, and style it appropriately.

Widget methods and functions dictionary

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Here's a full list of the variables, functions, and methods available in our Contextual Help Widget 2.0:

Function/Method	Description	Additional notes	References
`_ko19.open();`	Open the widget	Often used after or with other methods	Open widget to a specific article or category
`_ko19.close();`	Close the widget	Often used after or with other methods	
`_ko19.reset();`	Reset the widget's displayed article and recommended articles	Puts the widget back into an "empty" state. Can be used to clear out the widget on close or to clear out recommended content before running the `_ko19.updateRecommended()` method	
`_ko19.onOpen = function() {}`	The widget has been opened	Use this to execute code when the widget is opened	Open widget to specific tab Using Widget 2.0 on Single Page Applications Prepopulate Widget 2.0 Contact Form fields
`_ko19.onReady = function () {}`	The widget is loaded and ready to receive commands	Use this to execute code when the widget is ready	Widget 2.0 JWT authentication Widget 2.0 OAuth2 authentication
`_ko19.onLoad = function() {}`	The widget is loaded--generally serves to open the widget as soon as the page loads	Use this to execute code when the widget is loaded rather than opened	Open widget to specific tab Prepopulate Widget 2.0 Contact Form fields

Function/Method	Description	Additional notes	References
`_ko19.onTabChange = function(changeData) {}`	The active tab of the widget has been changed	When onTabChange is triggered, `changeData` will return the old tab and new tab, for example: `{ oldTab: "recommended", newTab: "article" }`	
`_ko19.openArticle('article-identifier');`	Loads the specified article in the widget	Replace `article-identifier` with article permalink or ID. Keep in single quotes.	Open widget to a specific article or category
`_ko19.openCategory('category-identifier');`	Loads the specified category in the widget	Replace `category-identifier` with category permalink or ID. Keep in single quotes.	Open widget to a specific article or category
`_ko19.loadContact();`	Load/open the Contact tab	Generally used with onLoad or onOpen	Open widget to specific tab
`_ko19.loadKnowledge();`	Load/open the Knowledge tab	Generally used with onLoad or onOpen	Open widget to specific tab
`_ko19.loadRecommended();`	Load/open the Recommended tab	Generally used with onLoad or onOpen	Open widget to specific tab
`_ko19.updateRecommended('currentUrl');`	Update the page path passed to the widget to a path of your choice.	Replace `currentUrl` with path to use. Most often used with Single Page Applications, though can be used in any situation where you want to transform the URL when passing it to widget. Best to only call this when a reader has initiated widget opening. May want to combine this with `_ko19.reset()` ;	Using Widget 2.0 on Single Page Applications
`_ko19.updateContact({name: '*Sample name*', email: '*Sample email*' });`	Prepopulate Contact tab fields when authentication isn't used	Accepts name and email details. Replace `Sample name` and `Sample email` with values in single quotes	Prepopulate Widget 2.0 Contact Form fields
`_ko19.containerId = "my-custom-div-id";`	Specify your own wrapper div to put the widget in	This is a variable rather than a function added to the Widget embed script after the `_ko19.base_url` . Replace `my-custom-div-id` . Will not change the width of 370px;	Advanced option: add the widget in your own div wrapper

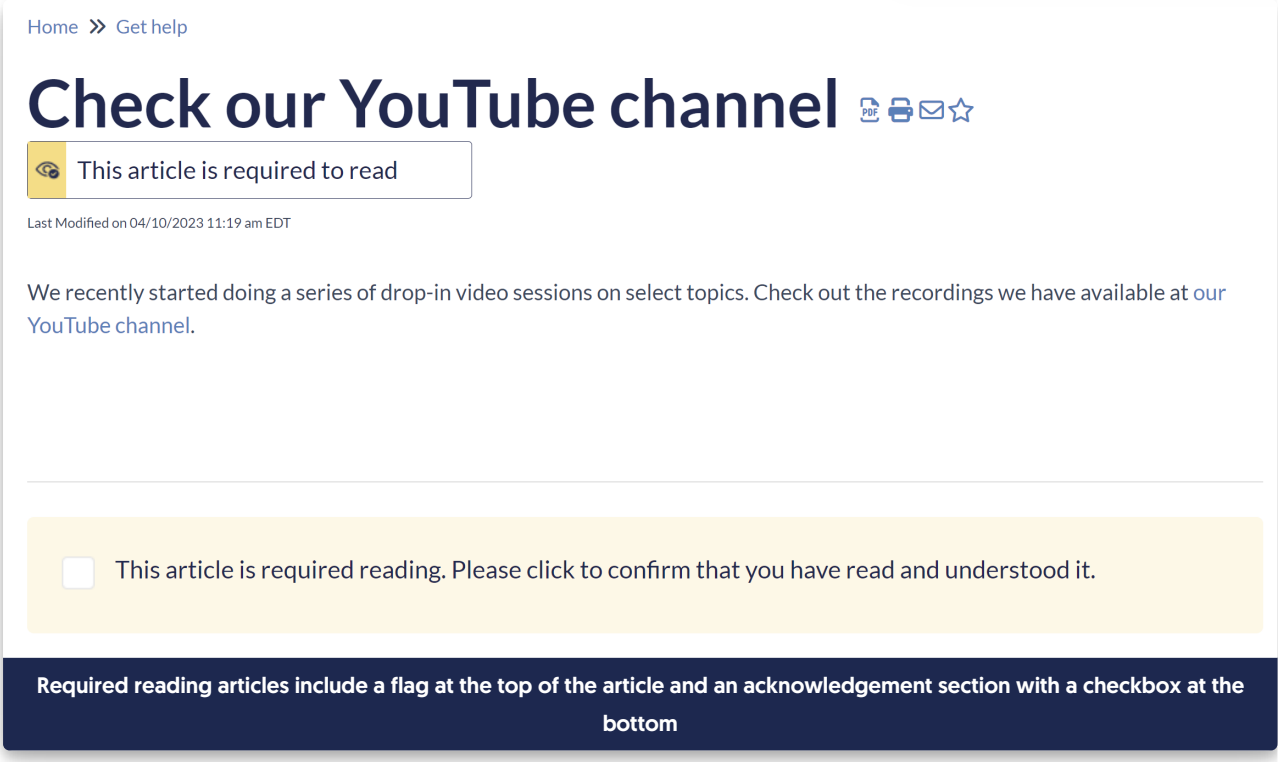
Function/Method	Description	Additional notes	References
`_ko19.onAuthResp = function(response) {}`	When authenticating, the widget will pass the response from the authentication back here.	Useful for debugging purposes if an error occurs in authentication	Widget 2.0 JWT authentication Widget 2.0 OAuth2 authentication
`_ko19.onAuthError = function () {}`	When authentication is used, the widget will call this function whenever authorization fails.	This can occur before the reader is logged in, and after the authentication expires. With most workflows, you will want to re-authorize the reader when this event occurs.	Widget 2.0 JWT authentication Widget 2.0 OAuth2 authentication
`_ko19.authenticate();`	For use with authentication; pass your token as JSON into the widget's authenticate function	Format should be: `{'type': 'jwt|oauth', 'token': token_value}`	Widget 2.0 JWT authentication Widget 2.0 OAuth2 authentication

Required Reading overview

Last Modified on 07/10/2024 5:00 pm EDT

If you use individual reader accounts (either directly within KnowledgeOwl or via Single Sign-on or remote authentication), you can enable Required Reading. This allows you to set certain articles as required, with a start date as to when they are required.

When a reader views an article that is required, they'll see a message in the article itself and a checkbox to acknowledge that they've read and understood it.



Required reading articles include a flag at the top of the article and an acknowledgement section with a checkbox at the bottom

We track the date of their acknowledgement and the approximate reading time, and you can export that information in **Reporting** > **Required Reading**.

Readers can see all articles marked as Required Reading by navigating to the Required Reading page in your knowledge base. You can also choose to include a Required Reading article list on your homepage.

You decide where you want the required flag message and the required acknowledgement checkbox to appear in your articles, and you can use Customize Text to tweak the wording for each to fit your knowledge base. See Enable and configure Required Reading for full details on using the feature!

And if you make updates to the article and need to re-require readers to read and acknowledge those changes, add a new start date and the article will appear to readers as needing their attention again.

Required Reading can be a great way to confirm and track that employees are reading updated policies and procedures, or to have a set of required articles for new hires or department onboarding.



You cannot set articles in topic display categories, URL redirect articles, or custom content categories to be required. If you're interested in marking topic display categories' articles or custom content categories as required, please contact us and let us know you'd like to be added to our feature requests for this functionality!

Enable Required Reading

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To enable Required Reading, there are three changes you'll need to make and a few optional changes. The steps vary a bit depending on when your knowledge base was created:

Knowledge bases created before 5 October 2023

For knowledge bases created before 5 October 2023, or created by copying a knowledge base created before that date, the steps are:

1. Update your **Settings > Style** to include the Required Reading flag merge code in your Custom HTML article template.
    a. *Optional:* If your knowledge bases uses the Right Column layout, you can also add the flag merge code there.
2. Update your **Settings > Style** to include the Required Reading acknowledgement merge code in your Custom HTML article template.
3. In **Settings > Required Reading**, check the box to **Enable** Required Reading and **Save**.
4. *Optional:* Use Customize Text to update any of the wording that appears in the Required Reading sections, pages, or lists.
5. *Optional:* Add the Required Reading article list to your homepage or another page in your knowledge base.
6. *Optional:* Add a URL redirect category or article to your table of contents to help your readers jump quickly to the Required Reading page.

See the linked resources at various steps above to get more detailed instructions for each!

Once you're done with your setup, you can start marking articles as required and tracking your readers' acknowledgements!

For knowledge bases created after 5 October 2023

For knowledge bases created after 5 October 2023, the only required step is enabling the feature:

1. In **Settings > Required Reading**, check the box to **Enable** Required Reading and **Save**.
2. *Optional:* Review the placement of the Required Reading flag at the top of articles and the acknowledgements section near the bottom. If you're happy with the placement, no changes are needed. If you want to move them around a bit, see Add the Required Reading flag to your article template and Add the Acknowledgements section to your article template for inspiration!

3. *Optional:* Use Customize Text to update any of the wording that appears in the Required Reading sections, pages, or lists.
4. *Optional:* Add the Required Reading article list to your homepage or another page in your knowledge base.
5. *Optional:* Add a URL redirect category or article to your table of contents to help your readers jump quickly to the Required Reading page.

Once you're done with your setup, you can start marking articles as required and tracking your readers' acknowledgements!

Add the Required Reading flag to your article template

Last Modified on 05/29/2024 5:27 pm EDT

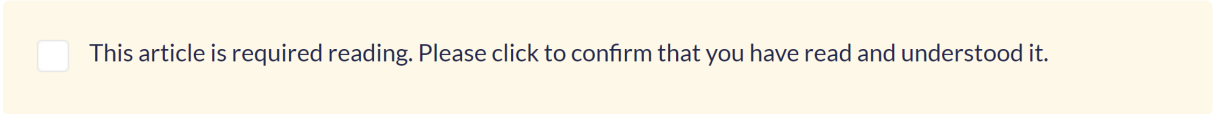
There are two sections displayed in required articles:

1. The required reading flag, usually displayed at the top of the article and/or in the Right Column:



Sample required reading flag when a reader first views a required article

2. The required reading acknowledgement section, usually displayed at the bottom of an article:



The required reading flag updates once a reader has checked the box to acknowledge that they've read it:



Sample required reading flag in an "Acknowledged" state

You choose where you'd like the flag to be placed by adding the Required Reading flag merge code into your Custom HTML in **Settings > Style**.

We recommend adding it in either:

- Your Article template
- Your Right Column template (if you're using a layout that displays a right column in articles!)

Here, we walk through adding the flag merge code to your article template:

1. Go to **Settings > Style**.
2. Below the Preview Pane, be sure **Custom HTML** is selected.
3. Select **Article** from the Custom HTML dropdown.
4. Copy the merge code below. (You can also find the merge code by clicking the **-- Select a Merge Code --** dropdown, go to the Article Merge Codes section, and select Required Reading Flag.)

```
[article("required_reading_flag")]
```

5. **Paste the merge code into the article template wherever you'd like this flag to appear. Here are some of the most popular placements:**
    a. **Above the article title:**



Sample required flag displayed above the article title

You can achieve this look by adding an extra line between the article header div and the hg-article-title h1 and pasting the merge code in there:



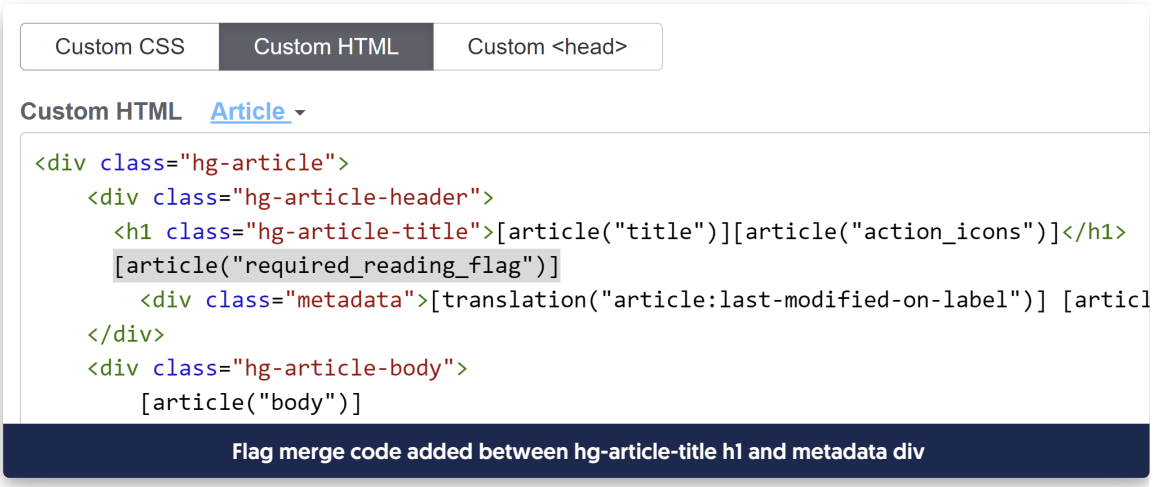
Flag merge code added between hg-article-header div and hg-article-title h1

    b. **Below the article title and above the "Last modified on..." statement:**



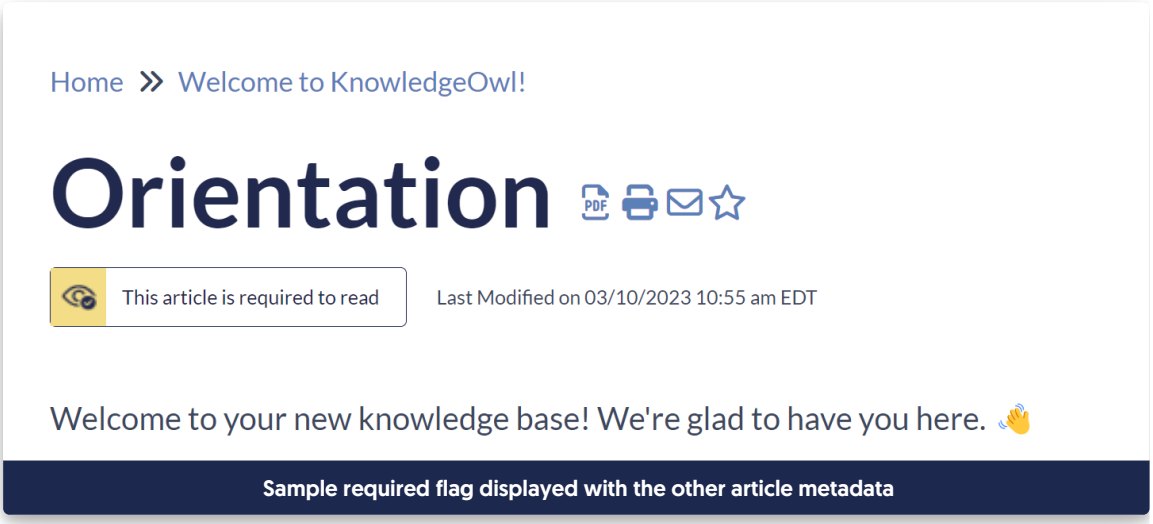
Sample required flag displayed between the article title and metadata

You can achieve this look by adding an extra line between the h1 for the article title and the metadata div, and pasting the merge code in there:



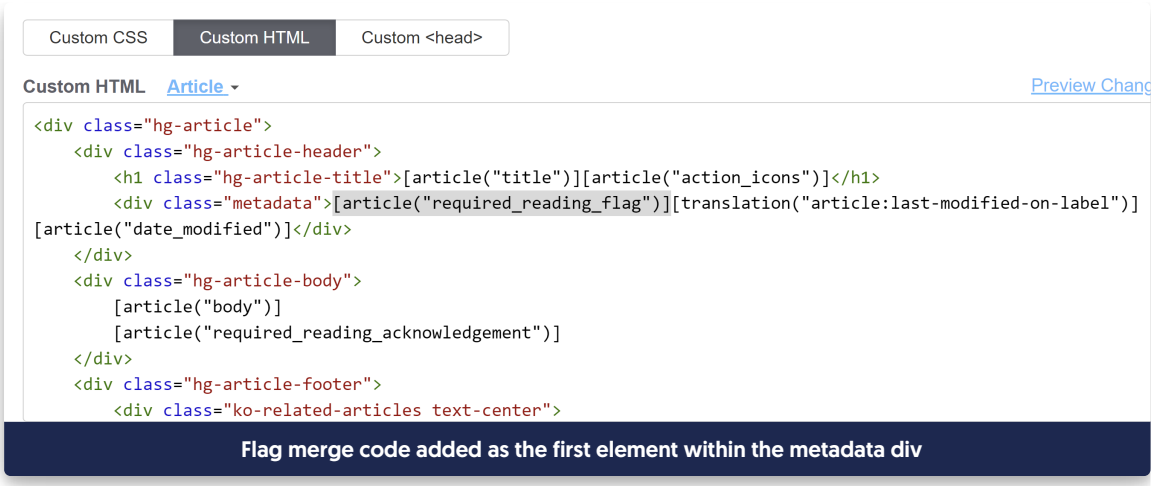
Flag merge code added between hg-article-title h1 and metadata div

c. In the same line as the "Last modified on..." statement:



Sample required flag displayed with the other article metadata

You can achieve this look by pasting your merge code as the first thing inside the metadata div:



d. **Below the "Last modified on..." statement, directly above the start of the content:**



You can achieve this look by adding an extra line after the metadata div and before the closing tag and pasting the merge code in there:



6. **Once you've made your changes, be sure to Save. (If you've already enabled Required Reading, you can**

Preview the changes to see how they look--just be sure you've selected Article from the dropdown above the Preview Pane!)

Add the Required Reading flag to your Right Column template

Last Modified on 05/29/2024 5:27 pm EDT

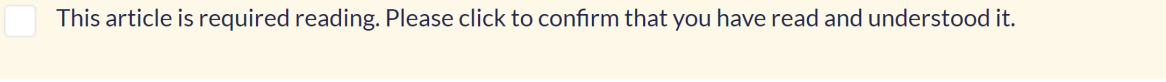
There are two sections displayed in required articles:

1. The required reading flag, usually displayed at the top of the article and/or in the Right Column:



Sample required reading flag when a reader first views a required article

2. The required reading acknowledgement section, usually displayed at the bottom of an article:





Sample required reading flag in an "Acknowledged" state

You choose where you'd like the flag to be placed by adding the Required Reading flag merge code into your Custom HTML in **Settings > Style**.

We recommend adding it in either:

- Your Article template
- Your Right Column template (if you're using a layout that displays a right column in articles!)

Here, we walk through adding the flag merge code to your Right Column template:

Only follow these instructions if you're using a layout that displays the Right Column AND you want the required reading flag in that right column. Otherwise, we recommend you Add the Required Reading flag to your article template.

1. Go to **Settings > Style**.
2. Below the Preview Pane, be sure **Custom HTML** is selected.

3. Select **Right Column** from the Custom HTML dropdown.
4. Copy the merge code below. (You can also find the merge code by clicking the **-- Select a Merge Code --** dropdown, go to the Article Merge Codes section, and select Required Reading Flag.)

```
[article("required_reading_flag")]
```

5. Paste the merge code into the Right Column template wherever you'd like this flag to appear.
6. We recommend putting it within the list-unstyled stat-list list, so you'd use code like this:

```
<li>[article("required_reading_flag")]</li>
```

7. Here are some of the most popular placements:
    a. At the top of the list, immediately under "About this Article"



Sample required flag displayed at the top of the About this Article section.

You can achieve this look by adding an extra line between the list-unstyled stat-list ul and the <li> for Created date and pasting the li-wrapped merge code in there:

Custom CSS | Custom HTML | Custom <head>

Custom HTML Right Column

```
<div class="panel panel-default right-col-panel art-info-panel">
    <div class="panel-heading">About this Article</div>
    <ul class="list-unstyled stat-list">
        <li>[article("required_reading_flag")]</li>
        <li>Created: [article("date_created")]</li>
        <li>[translation("article:last-modified-on-label")] [article("date_modified")]</li>
        <li class="hg-article-controls-right">
            [article("action_icons")]
        </li>
    </ul>
</div>
```

Flag merge code added between hg-article-header div and hg-article-title h1

b. Between the "Last modified on..." statement and the article action icons:



Sample required flag displayed between the article title and metadata

You can achieve this look by adding an extra line between the li for Last modified on/last updated and the li for hg-article-controls-right and pasting the li-wrapped merge code in there:

Custom CSS | Custom HTML | Custom <head>

Custom HTML Right Column

```
<div class="panel panel-default right-col-panel art-info-panel">
    <div class="panel-heading">About this Article</div>
    <ul class="list-unstyled stat-list">
        <li>Created: [article("date_created")]</li>
        <li>[translation("article:last-modified-on-label")] [article("date_modified")]</li>
        <li>[article("required_reading_flag")]</li>
        <li class="hg-article-controls-right">
            [article("action_icons")]
        </li>
    </ul>
</div>
```

Flag merge code added between hg-article-title h1 and metadata div

c. After the article action icons:



Sample required flag displayed with the other article metadata

You can achieve this look by adding an extra line between the li for hg-article-controls-right and the closing tag and pasting the li-wrapped merge code in there:



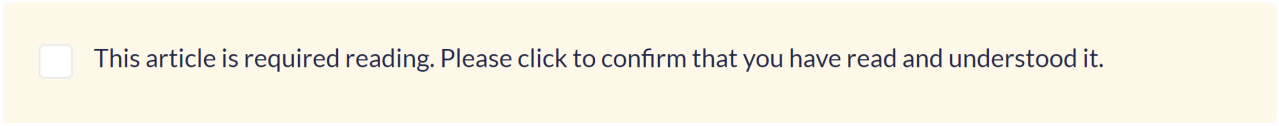
8. **Once you've made your changes, be sure to Save. (If you've already enabled Required Reading, you can Preview the changes to see how they look--just be sure you've selected Article from the dropdown above the Preview Pane!)**

Add the Acknowledgements section to your article template

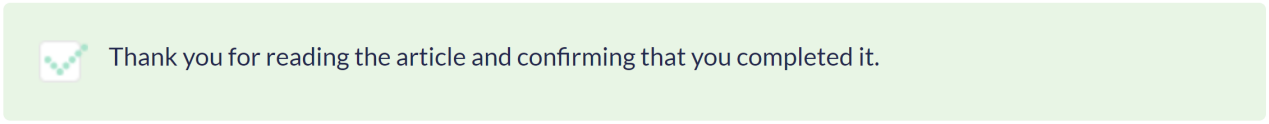
Last Modified on 05/29/2024 5:27 pm EDT

The Acknowledgements section provides a checkbox and a statement to certify that your reader has read and acknowledged reading a Required Reading article.

It looks like this initially:



And like this once a reader has checked the box to acknowledge they've read the article:



You can choose where in your article layout this statement goes.

We recommend only including this section at the bottom of the article body or in the article footer, to encourage people to actually read and scroll the entire page. **Don't put this section in your right column!**

To add the Acknowledgements section to your article template:

1. Go to **Settings > Style**.
2. Below the Preview Pane, be sure **Custom HTML** is selected.
3. Select **Article** from the Custom HTML dropdown.
4. Copy the merge code below. (You can also find the merge code by clicking the **-- Select a Merge Code --** dropdown, go to the Article Merge Codes section, and select Required Reading Acknowledgement.)

```
[article("required_reading_acknowledgement")]
```

5. Paste the merge code into the article template wherever you'd like the acknowledgement section to appear. Here are some of the most popular placements:
    a. Below the article body but above the article footer:

We've created some content here to answer questions you might have and share some different configuration options:

- **Get Started**: This is an abbreviated version of our whole Getting Started Guide, which walks you through some of the settings and configurations you may want to tweak to test things out. This is a custom content category, so it's a category that behaves more like an article.
- **Get help**: Find all the ways you can request help during and after your trial. This is a blog style category.
- **Evaluation resources**: Check out reviews from other KnowledgeOwl users, learn how to connect with us outside of your trial, and learn how to delete all this content once you don't need it. This is a default category.
- **Trial FAQs**: Here, we provide answers to some of the questions we get asked most often by trial users. This is a topic display category using the accordion layout. You can ignore this category if you created this new knowledge base as part of an existing paid account!

This article is required reading. Please click to confirm that you have read and understood it.

Related Articles

Get started

Sample acknowledgements section after the article body. Note that the largest white space is between the acknowledgements and the footer

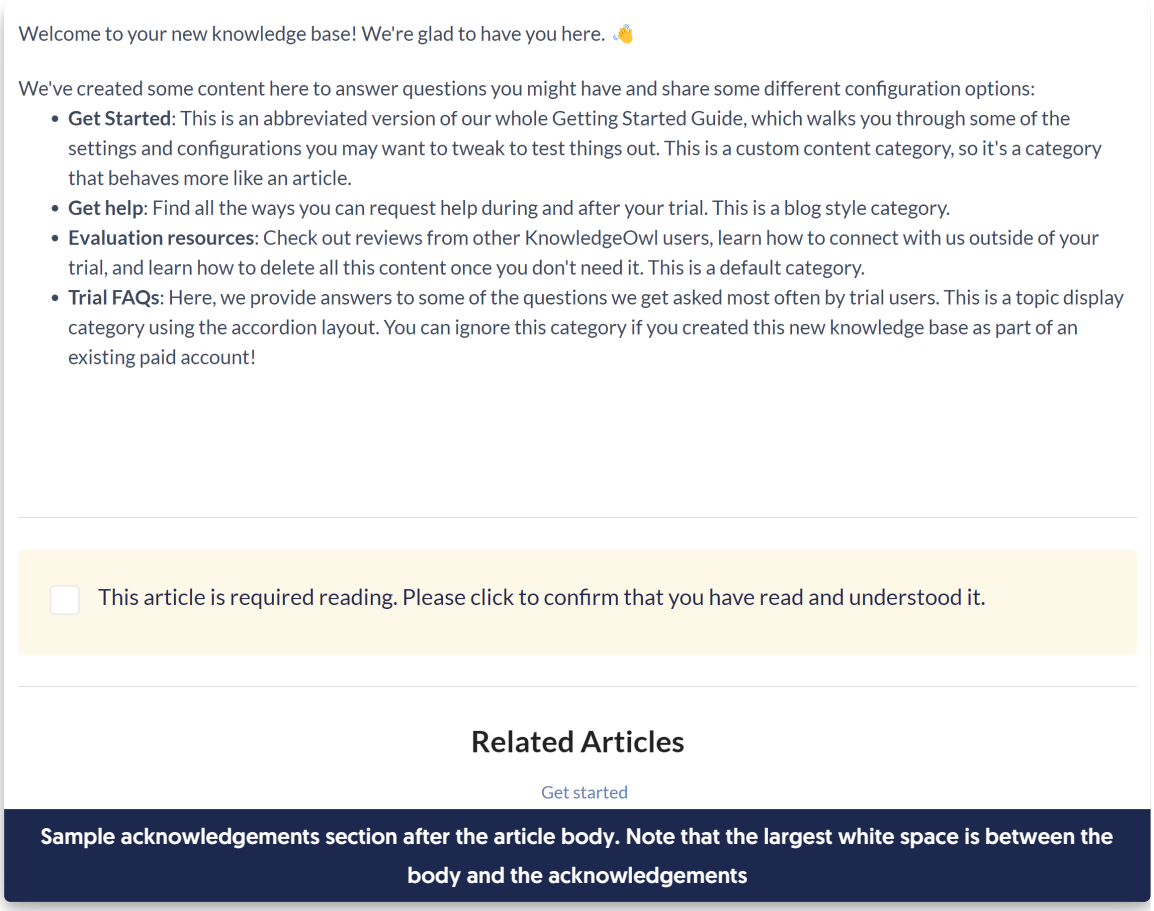
To achieve this placement, find the article("body") merge code, add a new line after it, and paste the merge code onto that line:

Custom CSS | Custom HTML | Custom <head>

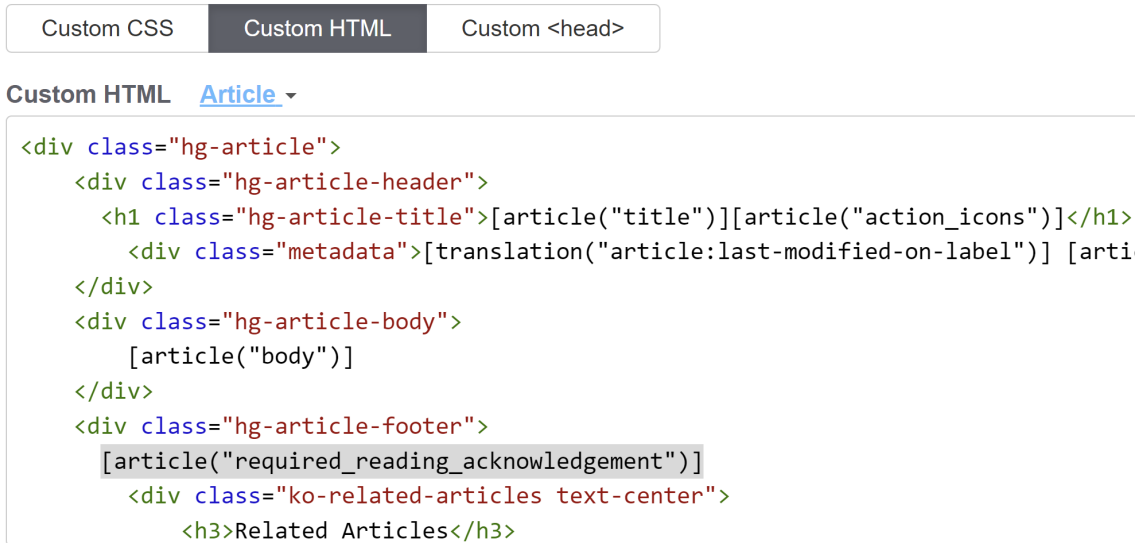
Custom HTML Article

```
<div class="hg-article">
    <div class="hg-article-header">
      <h1 class="hg-article-title">[article("title")][article("action_icons")]</h1>
        <div class="metadata">[translation("article:last-modified-on-label")] [arti
    </div>
    <div class="hg-article-body">
        [article("body")]
        [article("required_reading_acknowledgement")]
    </div>
    <div class="hg-article-footer">
        <div class="ko-related-articles text-center">
```

b. At the top of the footer, above Related Articles:



To achieve this placement, find the hg-article-footer div, add a new line after it, and paste the merge code onto that line:



6. **If you've already enabled Required Reading, you can Preview Changes to see how they look (just be sure "Article" is selected from the Preview Pane dropdown!).**

7. **Once you're done making changes, be sure to Save them!**

Change the Required Reading text

Last Modified on 05/29/2024 5:27 pm EDT

Don't like the word "required"? Want to change the confirmation acknowledgement message displayed to readers? No problem!

You can change all of the text we display in any of the Required Reading elements, including:

- The Required and Confirmed messages in the flag section
- The Required and Confirmed acknowledgement messages
- The title of the Required Reading page

To do so:

1. Go to **Tools > Customize Text**.
2. Select **Required Reading** from the Knowledge Base Section dropdown.
3. Add your own custom strings for the text you'd like to change.

See Add or edit your own text string and Section breakdown: Required Reading for more detailed instructions.

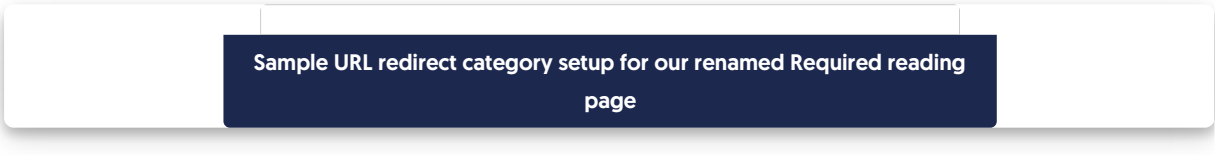
Add a Required Reading link to Table of Contents

Last Modified on 07/17/2024 10:44 am EDT

Settings > Required Reading currently doesn't have an option to automatically add a link to the Required Reading page into your Table of Contents. If you're interested in this as a feature, please contact us to request it!

In the meantime, we suggest creating a URL Redirect category to add it to your Table of Contents. To do so:

1. In Articles, create a new category.
2. Add a **Category Title**. If you've kept the default settings, use `Required Reading`. If you've customized the text, match whatever you've entered for the Required Reading page title.
3. Select URL Redirect category for the style of landing page.
4. In the External URL box, add your knowledge base homepage URL and add `/required-reading` to it. So, for example, if I'm setting this up here in our Support KB and I've renamed my Required Reading page to be Mandatory materials, here's what my Add Category pop-up might look like:



Sample URL redirect category setup for our renamed Required reading page

5. Select **Add and Edit** to open the new category for editing.
6. *Optional:* If you want this link to display in the Table of Contents only (and not on on your knowledge base homepage), in the **Content Restrictions** section, check the box to **Hide from homepage**.
7. *Optional:* If you want to display the category on your homepage and you're using category icons, be sure you add a category icon!
8. **Save** and go Back to the Articles page.
9. Use the arrow to drag and drop the new category wherever you'd like it to appear in your table of contents. (We recommend putting it near the top if your table of contents is long!)

Add a Required Reading article list to your homepage

Last Modified on 07/17/2024 2:27 pm EDT

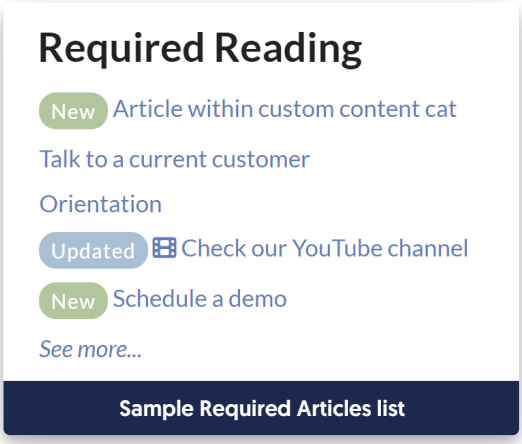
Want to display some of the required articles directly on your homepage? You can do that, too.

We've created an article list merge code specifically for this purpose!

The Required Reading feature and list only work with individual reader accounts. Knowledge bases with default access set to public, shared passwords, or shared IP addresses cannot use this feature.

How does it work?

To set up, you'll add the merge code for the list where you'd like the information to be displayed. KnowledgeOwl will display up to 10 of the most recently required articles in the list, and the See more link at the bottom will navigate readers directly to the Required Reading page to view a full list and see which articles they need to acknowledge.



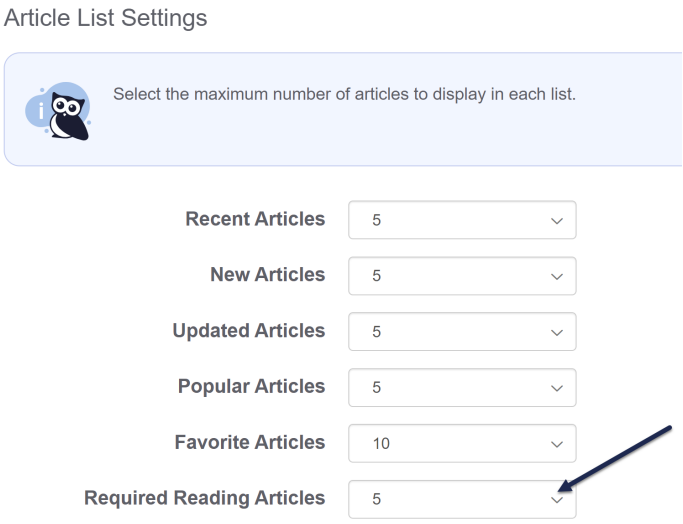
If your knowledge base allows a mixture of public and private content, the Required Reading Article List will show as empty/blank for anyone who hasn't logged in.

Setup

By default, the 5 most recently required articles will be displayed. You can change this to display between 1-10:

1. Go to **Settings** > **Basic**.
2. Scroll to the **Article List Settings** section.

3. Click on the dropdown next to **Required Reading Articles** and select the number of articles you'd like the list to display (1-10).



4. Be sure to **Save** your changes.

Some assembly required
We do not add this list to any section of your knowledge base by default.

If you'd like to add it, you'll add two merge codes into either the top-level **Homepage** content editor or into the **Settings > Style > Custom HTML** of the relevant layouts:

- `[translation("required-reading:required-reading-list-heading")]` : this merge code grabs the Required Reading list heading in **Tools > Customize Text > Customize Text**, making it so no one has to edit the code in the future to update the title
- `[template("required-articles")]` : this merge code generates the required articles list

Different setups are discussed further below.

Add the Required Articles List to your homepage (Settings > Style)

Newer knowledge bases have their entire homepage set in **Settings > Style**. If your knowledge base uses this layout, you can follow these instructions to add the Required Articles List there. (If your knowledge base doesn't show any article lists in **Settings > Style > Custom HTML > Homepage**, skip these and follow the next set of instructions!)

1. Go to **Settings > Style**.
2. Below the Preview pane, be sure **Custom HTML** is selected.
3. Select **Homepage** from the Custom HTML dropdown.
4. Near the bottom of the code editor, find the div with class="homepage-widgets row".
5. Copy one of the other article lists and paste that code in again.
6. Replace the title merge code with:

```
[translation("required-reading:required-reading-list-heading")]
```

7. Replace the list merge code with:

```
[template("required-articles")]
```

8. Your code should now look something like this, with the changes in row 5:

```
<div class="homepage-widgets row">
  <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:popular-articles")]</h3>[template("po
  <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:new-articles")]</h3>[template("new-a
  <div class="col-md-4 col-sm-6"><h3>[translation("article-lists:updated-articles")]</h3>[template("u
  <div class="col-md-4 col-sm-6"><h3>[translation("required-reading:required-reading-list-heading"
</div>
```

9. You can **Preview** your changes to be sure they look right.
10. Be sure to **Save** your changes once you're done!

Add the Required Articles List to your homepage (Homepage)

If you're using our older homepage:

1. In the left navigation, go to **Homepage**.
2. Copy one of the other homepage lists and paste it in again.
3. Replace the title merge code with:

```
[translation("required-reading:required-reading-list-heading")]
```

4. Replace the list merge code with:

```
[template("required-articles")]
```

5. **Save**.

Your homepage might now look like this:

Sample Homepage editor layout with Required Articles list added

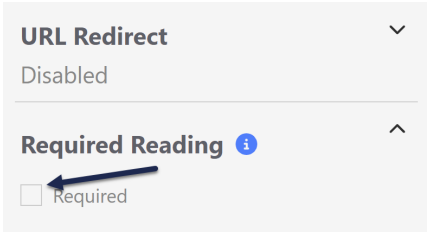
Make individual articles required

Last Modified on 05/29/2024 5:28 pm EDT

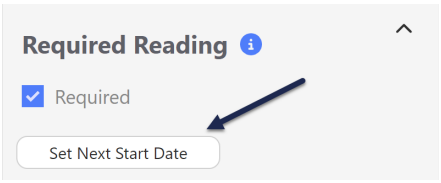
Once Required Reading is enabled, a Required Reading section will appear in the article editor (between URL Redirect and Inherited Restrictions).

To mark an article as required:

1. Open the article for editing.
2. In the righthand column, check the **Required** box in the **Required Reading** section (between **URL Redirect** and **Inherited Restrictions**).



3. Select the **Set Next Start Date** button that appears. Use the date picker to select your Start Date. You cannot pick a date in the future!



> A Start Date **must** be set for the article to appear as required for readers and for acknowledgements to be properly attributed.

4. Be sure to **Save** your article.

> You cannot set articles in topic display categories, URL redirect articles, or custom content categories to be required. If you're interested in marking topic display categories' articles or custom content categories as required, please contact us and let us know you'd like to be added to our feature requests for this functionality!

Once you save an article as required and add a Start Date:

- The article is displayed in the Required Reading page and the Required Reading article list (if used).
- The article will display the required reading flag and acknowledgement to readers.
- Readers' acknowledgements will be tracked and added to the Required Reading report.

See Retrigger the same article for new acknowledgement for adding additional Start Dates and Remove requirement or start date for removing a start date or unmarking an article as required.

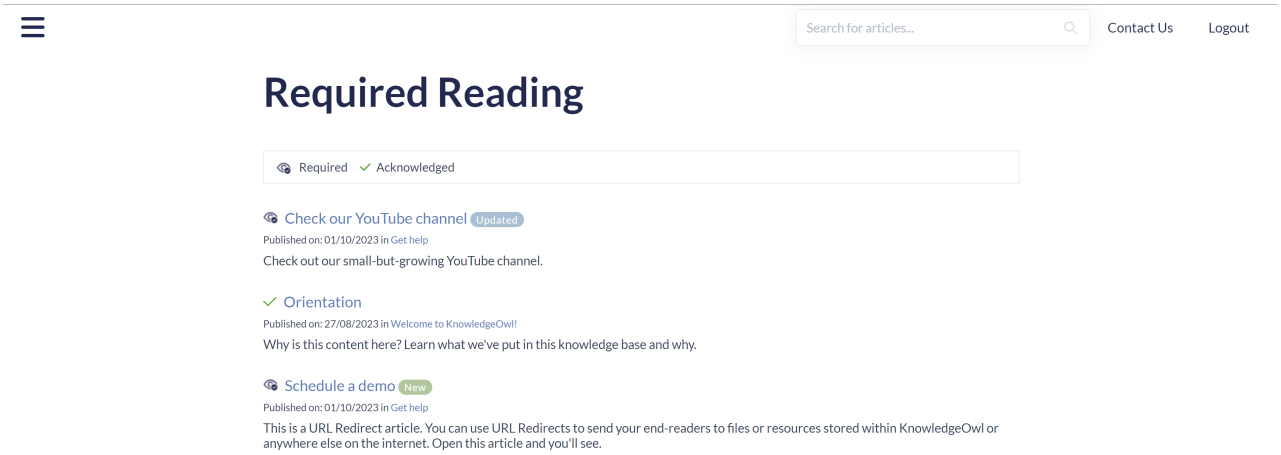
Access the Required Reading page

Last Modified on 05/29/2024 5:27 pm EDT

With Required Reading enabled, readers will see the flag and acknowledgement on all articles marked as required. This works great once they're in an article, but we also provide a single page to display all Required Reading articles across your knowledge base: the Required Reading page.

This page is automatically created when Required Reading is enabled. You can access it by going to your homepage URL and adding /required-reading to the web address. (So, for example, if we had it enabled here in our Support knowledge base, you could head to `https://support.knowledgeowl.com/help/required-reading` to view ours.)

Here's a sample:



This page lists all articles marked as required, with those most recently added as required at the top.

The page adjusts based on which reader is viewing it: it adjusts the Required vs. Acknowledged icons next to each article based on the reader's acknowledgement history.

The page will open from the "See more..." link in the Required Reading article list. If you'd like to add it to your table of contents or your homepage, you can also consider creating a URL redirect category for your Required Reading list.

Want to change the page title or the labels for "Required" and "Acknowledged"? The text in this page can be customized using the Customize Text tool.

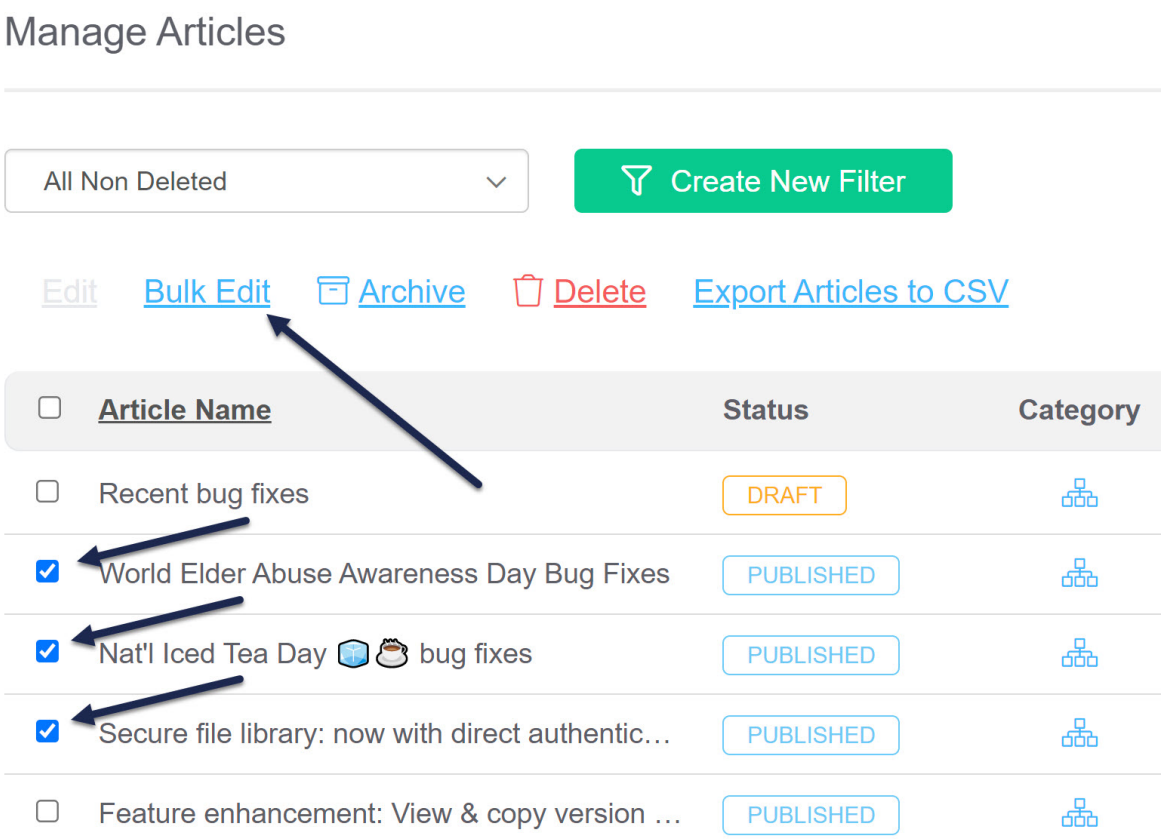
Bulk edit articles to make them required reading

Last Modified on 05/29/2024 5:28 pm EDT

If you have multiple articles you'd like to mark as required, you can either choose to edit them individually or you can use the **Bulk Edit** feature in **Manage** to mark them all required at once.

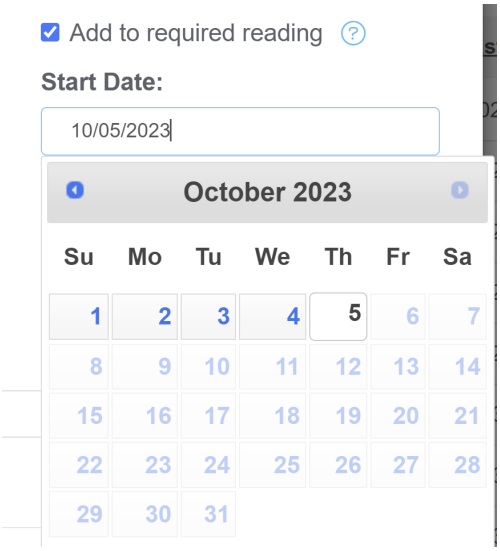
To bulk edit multiple articles to mark them as required:

1. In the top section of the lefthand navigation, select **Manage**.
2. If necessary, use a Standard or Custom filter and/or search to display the articles you want to mark as required.
3. Check the boxes next to the articles you'd like to mark as required.
4. Select the **Bulk Edit** link.



5. In the Bulk Edit Articles pop-up, in the **Add Options** section, check the box next to **Add to required reading**.

6. Once you check the box, a Start Date field will appear. Use the date picker to select the date you'd like to use as the Start Date for the required reading. (When all else fails, use today's date!)



7. Make any other bulk edit selections you'd like.

8. Once you've done making your selections, select the **Update Articles** button to begin the bulk edit.

Once your bulk edit is complete, all articles you selected will be marked as Required and have the Start Date set to whatever date you selected.

You cannot set articles in topic display categories or URL redirect articles to be required. Bulk Edits on these articles won't go through.

For more information on all the options in the Bulk Edit pop-up, see Bulk editing articles in Manage.

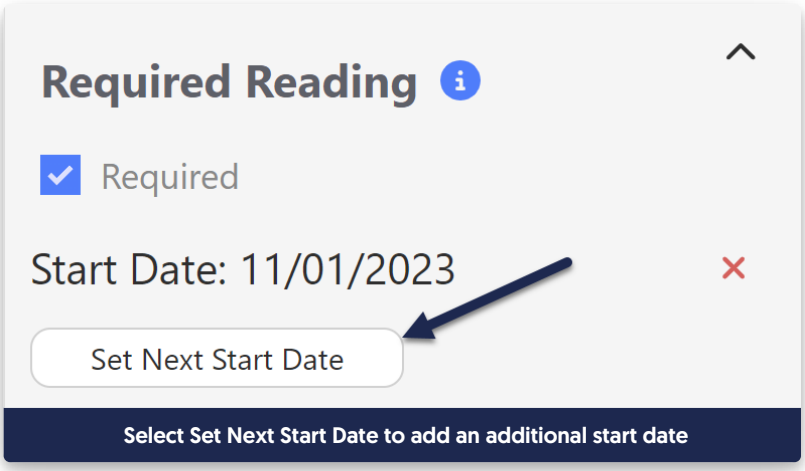
Retrigger the same article for new acknowledgement

Last Modified on 05/29/2024 5:28 pm EDT

If you update content in an article and you'd like to re-require readers to acknowledge reading it--never fear, you can do that!

To do so, you'll add an additional **Start Date** to the **Required** section of the editor:

1. Open the article for editing.
2. Scroll to the **Required Reading** section.
3. Select the **Set Next Start Date** button.



4. Choose the new Start Date you'd like to add from the date picker.
5. Be sure to **Save** your changes.

When multiple Start Dates exist for an article, we compare the readers' history of acknowledgements to those dates to determine whether they need to acknowledge the article.

So for example, let's say I have a policy we update internally.

- I set an original Start Date for it being required on 1st October 2023.
- Linus, my reader, acknowledged that article on 15th October 2023.
- Then I made some updates to the article on 15th November 2023, so I added a new start date for 15th November.

The next time Linus checks Required Reading, it will say that he still needs to acknowledge this article. Once he acknowledges after 15th November, it will show as acknowledged for him again.

Both of Linus' acknowledgements for this article will show up in the Required Reading report, one with a Date of Record for 15th October, and one for his next acknowledgement. ☺

Remove requirement or start date

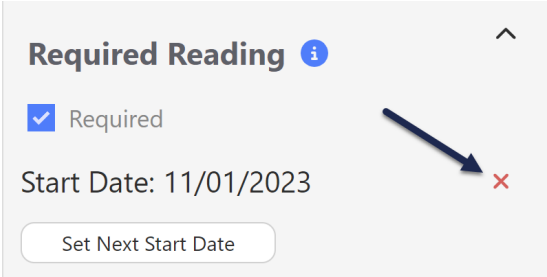
Last Modified on 05/29/2024 5:28 pm EDT

You've set an article as required and collected acknowledgements. But then, something changes: maybe the policy is no longer relevant, or it's being worked on and you don't want it to appear as required any longer. You have a few options.

Remove an existing Start Date

To remove an existing Start Date from an article:

1. Open the article in the editor.
2. In the **Required Reading** section, click the red X next to any Start Date to remove that Start Date from the article:



3. Be sure to **Save** your changes.

When you remove a Start Date, we will **preserve** all previous reader acknowledgements for that article in the Required Reading report. This way, you don't lose any important historical data.

If you remove the only Start Date listed for an article:

- The article will disappear from the Required Reading page and the Required Reading article list (if used).
- The article will no longer display the required reading flag and acknowledgement to readers.

Uncheck the Required box

If you no longer want the article to ever be considered required, you can uncheck the **Required** box in the editor and **Save**.

When you uncheck the Required box:

- All Required Start Dates will be removed from the article.
- The article will disappear from the Required Reading page and the Required Reading article list (if used).
- The article will no longer display the required reading flag and acknowledgement to readers.
- We will still **preserve** all previous reader acknowledgements for that article in the Required Reading report. This way, you don't lose any important historical data.

What is SMTP?

Last Modified on 05/29/2024 5:28 pm EDT

Simple Mail Transfer Protocol (SMTP) is an internet protocol that allows mail servers to send and receive email messages. Within KnowledgeOwl, SMTP is used as a way to send email messages generated within/by KnowledgeOwl to your own mail server for relaying/sending to your readers.

SMTP is required for Subscriptions and is optional for Reader emails.

Why use SMTP when it's optional? Using your own SMTP service can help:

- Avoid quarantining or spam filtering of emails sent directly from KnowledgeOwl
- Create a much stronger brand identity and make communications from KnowledgeOwl seem more official to your readers
- Enable you to remove the reference to KnowledgeOwl from reader emails (by default, reader emails are sent form support@knowledgeowl.com, for example)
- Make your security/IT teams happier if they like having in-house control and visibility into things

To configure SMTP services:

1. Click on your **profile icon/name** in the upper right.
2. Select **SMTP** from the dropdown.

You define an SMTP service once for your account and then you can select which features and/or knowledge bases use those services. You can create multiple SMTP services for use by different knowledge bases (Subscriptions only; Reader emails all use a single SMTP service).

Within KnowledgeOwl, there are three "flavors" of SMTP you can configure:

- Unauthenticated: The SMTP service doesn't require a username/password combination
- Basic authentication: The SMTP service uses a username/password (or username/app password)
- OAuth2: The SMTP service uses an OAuth2 authentication flow, which is a more secure authentication type than basic authentication. It requires a client/secret combination and its own authorization flow.



Currently, KnowledgeOwl supports Microsoft OAuth2 only. If you need us to add OAuth2 for another provider, please contact us and let us know which provider you're interested in.

Create a new SMTP service: Basic authentication

Last Modified on 05/29/2024 5:27 pm EDT

Many email providers support what's called a "basic authentication" model for SMTP. In this model, you provide a username and password to log in to the SMTP host.

Before you configure the SMTP service in KnowledgeOwl, check with your SMTP provider for their specific instructions. You may need to contact your IT administrator to help set this up.

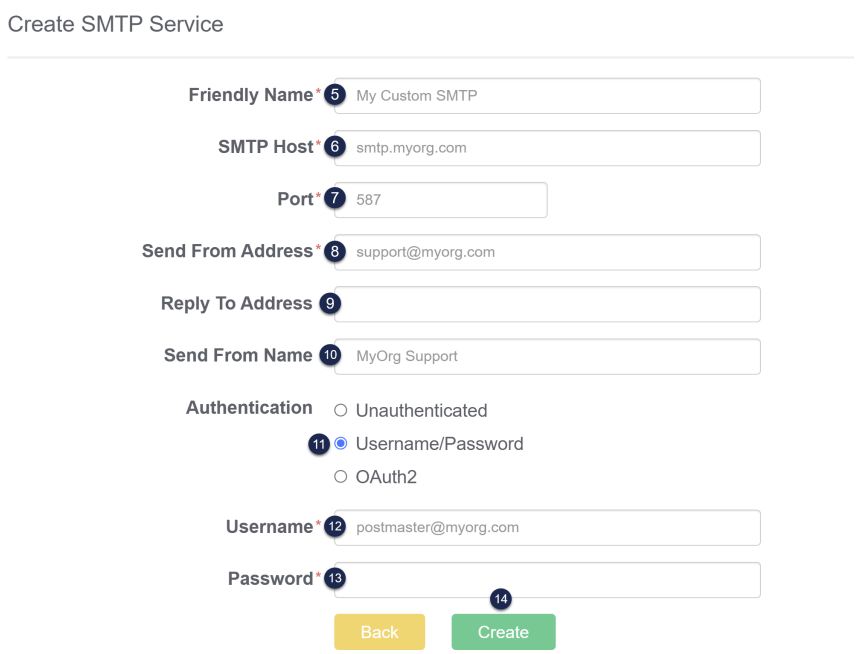
Each email server is a bit different, but we've tried to capture information on finding your SMTP settings from these popular providers:

- Gmail
  - If you're using two-factor authentication in G-Suite or with Gmail, you will likely need to use an App Password. See additional steps in Gmail for two-factor authentication.
  - We don't yet support Oauth2 authentication for G-Suite or Gmail; please contact us to let us know if you're interested in us adding it!
- Mailgun
- Office 365 (may require IIS)
  - Microsoft is moving away from basic authentication in SMTP, so we recommend using the OAuth2 configuration for your SMTP instead.

If your provider isn't listed above, try searching for information on configuring SMTP mail relay for external use or checking your SMTP settings.

Once you have detailed instructions for your SMTP provider, you can begin setting up your new SMTP service. To do so:

1. Click on your **profile icon/name** in the upper right.
2. Select **SMTP** from the dropdown.
3. Select the **+ Configure New Service** button.
4. This will open the Create SMTP Service page:

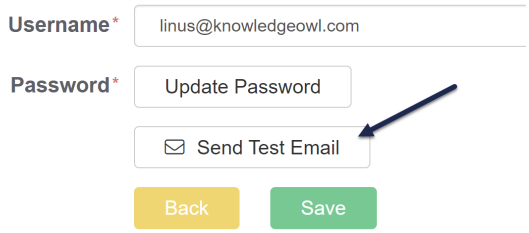


5. Add a **Friendly Name**. This is the name that will be displayed in SMTP dropdowns for individual features, so it should describe the SMTP service in some way.
6. Add the **SMTP Host**. This is the address your email server provides for the SMTP host.
7. Add the **Port**. Most providers will have specific recommended ports. Where possible and supported, we recommend using port 587, as this is the port used by modern email servers for secure submission of email for delivery. If you'd like to encrypt emails during transmission, we recommend using port 587 with TLS enabled unless otherwise directed by your provider.
8. Add the **Send From Address**. The email address that will show up in the "From" field for all emails sent using this SMTP service.

   If you're using Google's SMTP, it will automatically override whatever Send From address you use here with the SMTP Username.

9. *Optional:* Add a **Reply To Address**. This allows you to specify a Reply-to address different from the Send From Address.
10. *Optional:* Add a **Send From Name**. This is the name that will show up in the "From" field for any emails sent using this SMTP service.
11. In the **Authentication** section, select **Username/Password** to configure your SMTP using basic authentication.
12. Add the **Username** used to log in to the SMTP Host.
13. Add the **Password** used to log in to the SMTP Host.
14. Once you've finished completing all fields, click **Create** to finish creating the SMTP service.

15. Once the service is created, a **Send Test Email** button will appear below the Username/Password section:



We **strongly recommend** sending a test email to confirm your SMTP is set up correctly. If it's not set up correctly, we'll try to show you an error message to help you determine what's wrong. Error messages should be one of two types:

a. **Basic validation:** we'll alert you if the email addresses you've entered don't follow standard email address conventions or if no fields have been left blank.

b. **SMTP provider validation:** if the error comes from the call to your SMTP provider, we'll return the error message they provide.

16. Once you receive the successful confirmation message after sending a test email, your SMTP service is fully configured!



You can now use this SMTP in:

- Any knowledge base's Subscription settings
- Your account's Reader emails for reader welcome and password reset emails

KnowledgeOwl IP Address

If you need to set up an exception for these communications with your SMTP provider, see Required IP addresses for more details.

Gmail for two-factor authentication

Last Modified on 05/29/2024 5:28 pm EDT

For Gmail basic authentication SMTP, you'll most likely need to set up an App Password. If you get a warning referencing error code **5.7.9** when you send a test email, you definitely need to set one up. This is most common with Gmail with two-factor authentication (2FA) but may be necessary for other Gmail configurations.

You'll use the App Password in place of your normal Gmail password. All the other SMTP settings are the same as regular Gmail accounts.



If you're using Google's SMTP, it will automatically override whatever Send From address you use with the SMTP Username, so be sure you're using the best account available to generate your App Password.

To create the App Password:

1. From the Google Account Settings (https://myaccount.google.com), click on **Security** on the left.
2. About halfway down the screen, in the **Signing In to Google** section, click the **App Passwords** link.
3. The next screen creates and manages App Passwords that will work with 2FA. Click on the dropdown to select an app and select 'Custom' to type in 'KnowledgeOwl' (or something else that will identify that this password is for your KB!).
4. Click **Generate**.
5. A 16-digit password will appear. This is good for only a few minutes. Copy it.
6. In KnowledgeOwl's SMTP settings, paste the 16-digit password you copied instead of the normal Gmail password.
7. Finish filling out the rest of the SMTP settings using standard Gmail settings and save.

If you do receive error 5.7.9, there's more information on how to resolve it (and more detail on the above steps) available in Google Account Help for Sign in using App Passwords.

Create a new SMTP service: Microsoft OAuth2

Last Modified on 05/29/2024 5:27 pm EDT

Many email providers are moving away from basic authentication in favor of an OAuth2 implementation. Where basic auth uses a username/password combination, OAuth2 has a more involved process involving a client ID and a client secret, plus an additional authorization step that generates a token that gets used behind the scenes. It's considered a more secure form of authentication.

Because OAuth2 is more involved, we're building out SMTP support for it based on customer request.



KnowledgeOwl currently supports Microsoft OAuth2 SMTP. If you need us to set up another SMTP provider's OAuth2 authorization flow, please contact us and let us know the provider--we will add new providers based on customer interest.

We've tested our OAuth2 configuration with the Azure Portal.

You will need your IT administrator to set up the Microsoft/Azure side of SMTP. We'd also recommend either giving them direct access to configure our side of the SMTP setup, or making sure you have time set aside to work with them to get things set up in KnowledgeOwl properly.

Resources for the Microsoft/Azure admin

1. You'll need to create an app on the Microsoft side to handle these requests. We found this Microsoft documentation helpful as a starting place:
    - Quickstart: Register an application with the Microsoft identity platform
    - Authenticate an IMAP, POP or SMTP connection using OAuth
2. You'll also need to have at least one active email account that can be used by that app. This user account must have the **Authenticated SMTP** permission in **Mail > Email Apps**.
3. Here are the settings we used for our app, though you may want to tweak for your setup:
    - Single tenant app registration OR Multi-tenant app registration
    - Under redirect URI, add a Web URI for `https://app.knowledgeowl.com/oauth2/custom-smtp-token`
    - In API permissions, we used **Microsoft Graph** > delegated permissions and used these permissions:
        - Mail.Send
        - Mail.Send.Shared

        - SMTP.Send

4. The app you create will need to go through an authorization process within KnowledgeOwl, initiated by a user of your organization. You will need to use Power Shell to set that user's value for `SmtpClientAuthenticationDisabled` to `false`. (See the official Microsoft documentation for more details: Enable or disable authenticated client SMTP submission (SMTP AUTH) in Exchange Online.)

5. On the KnowledgeOwl side, you'll need to provide:
    - The **email address** that should be used--this should be the email account mentioned in step 1 above.
    - The **Client ID**, listed as the Application or Client ID
        - If you're using Azure Portal, this is the Application (client) ID listed on the App registration's **Overview** page
    - The **Client Secret Value**
        - If you're using Azure Portal, you can generate this in the App registration's **Certificates & secrets**
        - In our testing, we were only able to have one active secret connecting to KO within the app; adding additional secrets failed.
    - If using a Single Tenant app, the Tenant ID listed on the App registration's **Overview** page

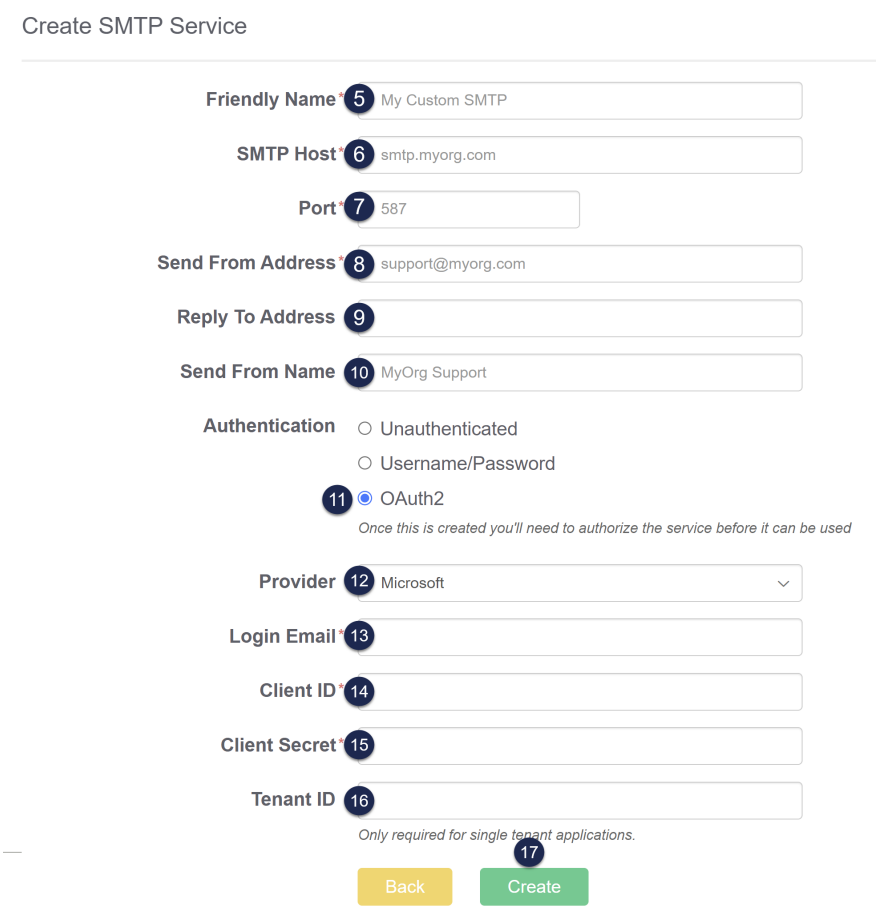


If you are using Azure SMTP within an app, it will **only** send to email addresses within your Azure organization (single tenant) or with a valid Microsoft email (multitenant). This setting can be configured in **Authentication > Supported account types** in Azure.

KnowledgeOwl setup

Once you have the Azure app and email account set up and a client secret generated, you can begin setting up your new SMTP service in KnowledgeOwl. To do so:

1. Click on your **profile icon/name** in the upper right.
2. Select **SMTP** from the dropdown.
3. Select the **+ Configure New Service** button.
4. This will open the Create SMTP Service page:



5. Add a **Friendly Name**. This is the name that will be displayed in SMTP dropdowns for individual features, so it should describe the SMTP service in some way.

6. Add the **SMTP Host**. This is the address your email server provides for the SMTP host. For Microsoft, use `smtp.office365.com` unless your IT admin tells you otherwise.

7. Add the **Port**. Most providers will have specific recommended ports. Unless your IT admin tells you otherwise, use `587`.

8. Add the **Send From Address**. The email address that will show up in the "From" field for all emails sent using this SMTP service. This should be a valid email address in your Microsoft organization.

9. *Optional:* Add a **Reply To Address**. This allows you to specify a Reply-to address different from the Send From Address.

10. *Optional:* Add a **Send From Name**. This is the name that will show up in the "From" field for any emails sent using this SMTP service.

11. In the **Authentication** section, select **OAuth2** to configure your SMTP using OAuth2.

12. Select **Microsoft** as the provider.

13. Add the **Login Email** that will be used to authenticate. This needs to be an account that has permissions to send email.

14. Add the **Client ID** from your app. In Azure Portal, this is the Application (client) ID listed on the App registration's Overview page.

15. Add the **Client Secret** from your app. In Azure Portal, you can generate this in the App registration's Certificates & secrets page.

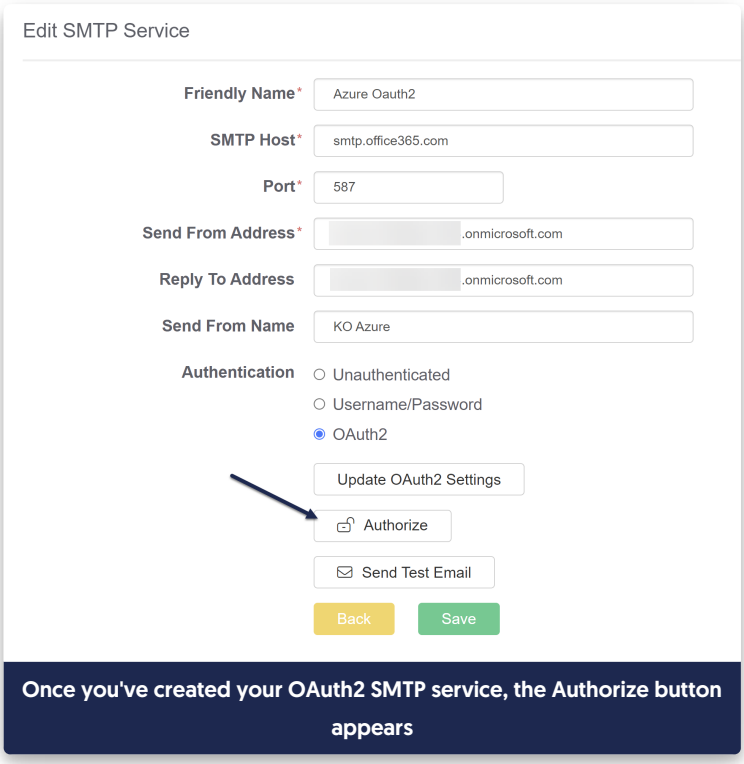
16. If you are using a Single Tenant app, add the **Tenant ID** for your app. In Azure Portal, this is the Tenant ID listed on the App registration's Overview page.



DO NOT ENTER A TENANT ID IF YOU ARE USING A MULTI-TENANT APP.

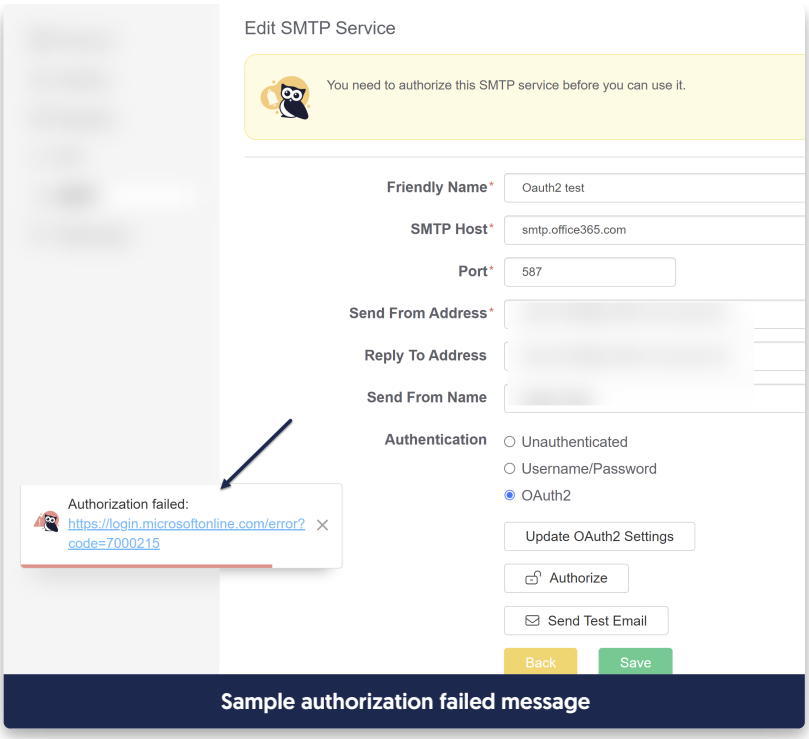
17. Once you've finished completing all fields, click **Create**.

18. Once you have created the service, you must **Authorize** that service. This uses the information you previously entered to perform the OAuth2 authorization flow and get the token we need to authenticate. To begin authorization, select the **Authorize** button.



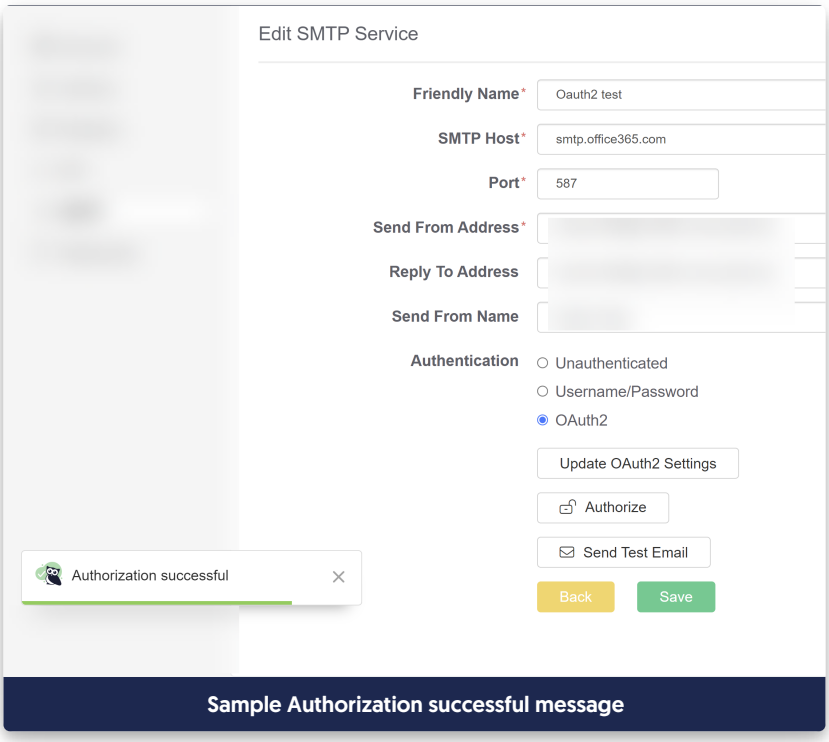
Once you've created your OAuth2 SMTP service, the Authorize button appears

a. If there are any issues authorizing your SMTP service, an error message will appear in the lower left. This message will contain a link to the error code we received back from Microsoft; you can click that link to get more details on what caused your authorization to fail. You'll want to review this error code with your IT admin:



Sample authorization failed message

19. **When the authorization completes successfully, a confirmation message will slide out in the lower left. Once you see that message, continue to the next step:**



Sample Authorization successful message

20. **Once you get the authorization successful message, click the Send Test Email to fully confirm the SMTP is configured properly. We strongly recommend doing this to confirm that emails are sending properly. (Note that Azure will expect you to send this to an email within your own organization.)**
    a. **If your authorization completed successfully, the test email should go through and show you a confirmation message. At this point, your SMTP is ready to use!**
    b. **If for any reason your test email fails:**

i. Try re-authorizing the service. Make sure you get a confirmation message.

ii. Be sure the test email you're sending is part of your organization's Azure platform. Azure SMTP cannot be used to send emails to external services.

iii. Be sure that your Microsoft admin has run the Power Shell command to set the account you're authorizing the app with to have `SmtpClientAuthenticationDisabled` set to `false`.

Once you have sent a successful test email, your SMTP service should now be available for use.

You can add it to:

- Any knowledge base's Subscription settings
- Your account's Reader emails for reader welcome and password reset emails

KnowledgeOwl IP Address

If you need to set up an exception for these communications with your SMTP provider, see Required IP addresses for more details.

Create a new SMTP service: Unauthenticated

Last Modified on 05/29/2024 5:27 pm EDT

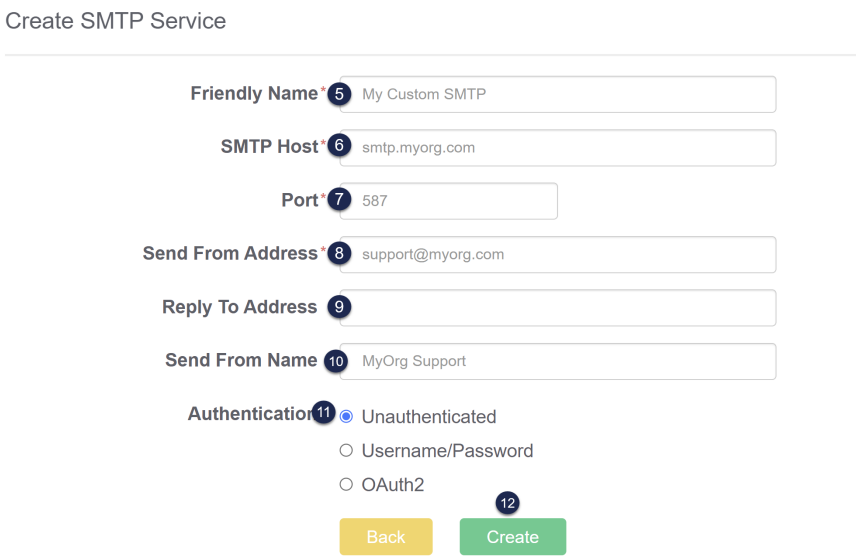
It's rare for an SMTP provider to not require authentication of some kind, but since we've had requests for it in the past, you have the option to add an unauthenticated SMTP service.

Only use this type of SMTP authentication if you've confirmed your SMTP provider doesn't require authentication!

Before you configure the SMTP service in KnowledgeOwl, check with your SMTP provider for their specific instructions. You may need to contact your IT administrator to help set this up.

Once you have detailed instructions for your SMTP provider, you can begin setting up your new SMTP service. To do so:

1. Click on your **profile icon/name** in the upper right.
2. Select **SMTP** from the dropdown.
3. Select the **+ Configure New Service** button.
4. This will open the Create SMTP Service page:



5. Add a **Friendly Name**. This is the name that will be displayed in SMTP dropdowns for individual features, so it should describe the SMTP service in some way.
6. Add the **SMTP Host**. This is the address your email server provides for the SMTP host.

7. Add the **Port**. Most providers will have specific recommended ports. Where possible and supported, we recommend using port 587, as this is the port used by modern email servers for secure submission of email for delivery. If you'd like to encrypt emails during transmission, we recommend using port 587 with TLS enabled unless otherwise directed by your provider.

8. Add the **Send From Address**. The email address that will show up in the "From" field for all emails sent using this SMTP service.

   > If you're using Google's SMTP, it will automatically override whatever Send From address you use here with the SMTP Username.

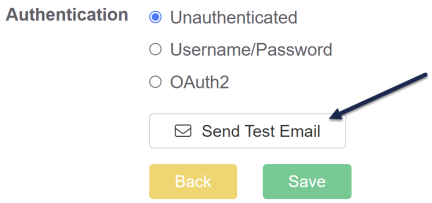
9. *Optional:* Add a **Reply To Address**. This allows you to specify a Reply-to address different from the Send From Address.

10. *Optional:* Add a **Send From Name**. This is the name that will show up in the "From" field for any emails sent using this SMTP service.

11. If your SMTP provider does not require authentication, in the **Authentication** section, select **Unauthenticated**.

12. Once you've finished completing all fields, click **Create** to finish creating the SMTP service.

13. Once the service is created, a **Send Test Email** button will appear below the Authentication section:



    We **strongly recommend** sending a test email to confirm your SMTP is set up correctly. If it's not set up correctly, we'll try to show you an error message to help you determine what's wrong. Error messages should be one of two types:

    a. **Basic validation**: we'll alert you if the email addresses you've entered don't follow standard email address conventions or if no fields have been left blank.

    b. **SMTP provider validation**: if the error comes from the call to your SMTP provider, we'll return the error message they provide.

14. Once you receive the successful confirmation message after sending a test email, your SMTP service is fully configured!



You can now use this SMTP in:

- Any knowledge base's Subscription settings

- Your account's Reader emails for reader welcome and password reset emails

KnowledgeOwl IP Address

If you need to set up an exception for these communications with your SMTP provider, see Required IP addresses for more details.

PDF overview

Last Modified on 05/29/2024 5:27 pm EDT

Your knowledge base supports three types of PDF exports:

- Individual article PDFs: when viewing an article in your knowledge base, readers can download a PDF of that article using the same general styles as your knowledge base. This can be enabled/disabled for the entire knowledge base or individual articles.
- Standard (Full knowledge base) PDF: Create a PDF file containing all published content in your entire knowledge base
- Custom PDF exports: Create PDFs from selections of published content in your knowledge base; great for things like onboarding guides, Getting Started, downloadable user manuals, etc.

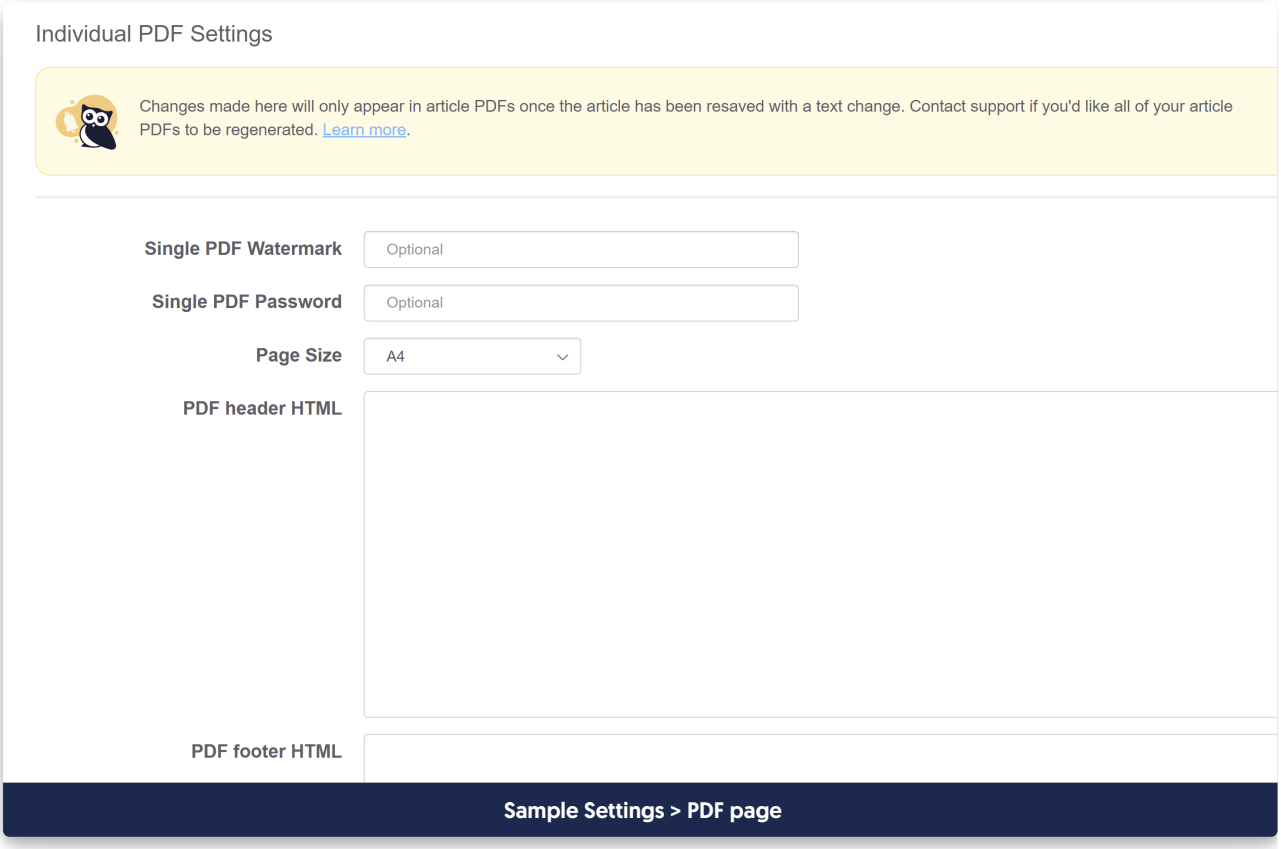
See below for more information on all three types, as well as tips on styling PDFs, using hyperlinks, and using passwords/watermarks.

Individual article PDFs

Last Modified on 05/29/2024 5:28 pm EDT

Each article can be exported to an individual PDF that will match the look and feel of your knowledge base. PDF exports can be toggled on and off globally as well as for individual articles.

To format and style your individual article PDFs, go to Settings > PDF.



Here, you can add:

1. **Single PDF Watermark:** Add text to serve as a watermark on individual article PDFs. This text will be displayed as a diagonal watermark text:



2. **Single PDF Password:** Enter a password that readers will have to enter in order to view the PDF once they download it. This password will apply to all individual article PDFs.
3. **Page Size:** Choose between A4 and US letter.
4. **PDF header HTML:** Add raw HTML to add a header to each page of your individual article PDFs. You can use a PDF Merge Code to add page numbers if you'd like!
5. **PDF footer HTML:** Add raw HTML to add a footer to each page of your individual article PDFs. You can use a PDF Merge Code to add page numbers if you'd like!

> Not used to formatting raw HTML? Try creating what you need in the article editor, then toggling to Code View to copy the HTML!

While PDFs will have the same styles as your overall knowledge base, you can override the styles for your PDFs using the CSS class "hg-pdf". This way, PDF articles can have styling different than your online versions. Add appropriate styles in **Settings > Styles** in the **Custom CSS** section.

The header and footer sections here are not impacted by CSS; to add and style headers and footers, you'll need to use straight HTML with in-line styles. We recommend placing headers or footers within a div or table and adding in-line styles for the div or table to help position the text where you'd like it.

For example, our PDF footers include this chunk of HTML:

```
<div style="text-align: center; font-size: 11px">Copyright © 2015 – 2024 Silly Moose, LLC. All rights reserved.<br>Pow
```

This div will be aligned in the center with a font-size of 11px. It then displays our copyright statement.



Once you make changes to your Individual Article PDF settings, you'll only see the changes in:

- Articles created after you made the changes
- Articles edited and saved after you made the changes (we usually use a specific article to test with and add/remove a line of text and re-save to test our formatting changes)

Once you have the individual article PDF formatted the way you'd like, contact us to regenerate all of your existing articles' PDFs.

See PDF look and feel for more ways to style or customize your individual article PDFs!

Standard PDF export (Full PDF Download)

Last Modified on 05/29/2024 5:28 pm EDT

The Standard PDF Export creates a PDF of all Published and Needs Review articles in your entire knowledge with a clickable table of contents. This PDF can optionally be displayed at the bottom of your table of contents to allow your readers to download an offline version of your content.

The Standard PDF can be customized with the following options:

- Customizable cover page
- Choose whether to include restricted content
- Exclude video content
- Specify A4 vs. US Letter page size
- Add a watermark and/or a password
- Add a custom footer



This Standard PDF will not automatically update as your content is updated; to ensure it's up-to-date, you'll want to periodically come into **Knowledge Base > Exports**, and click the **Save & Regenerate PDF Export** button.

What does include all private content do?

By default, the Standard PDF settings will leave the "Include all private content" box unchecked. With the box unchecked, the PDF will only include published content that has no reader group restrictions. If your Standard PDF is missing categories, it's likely because of this setting!

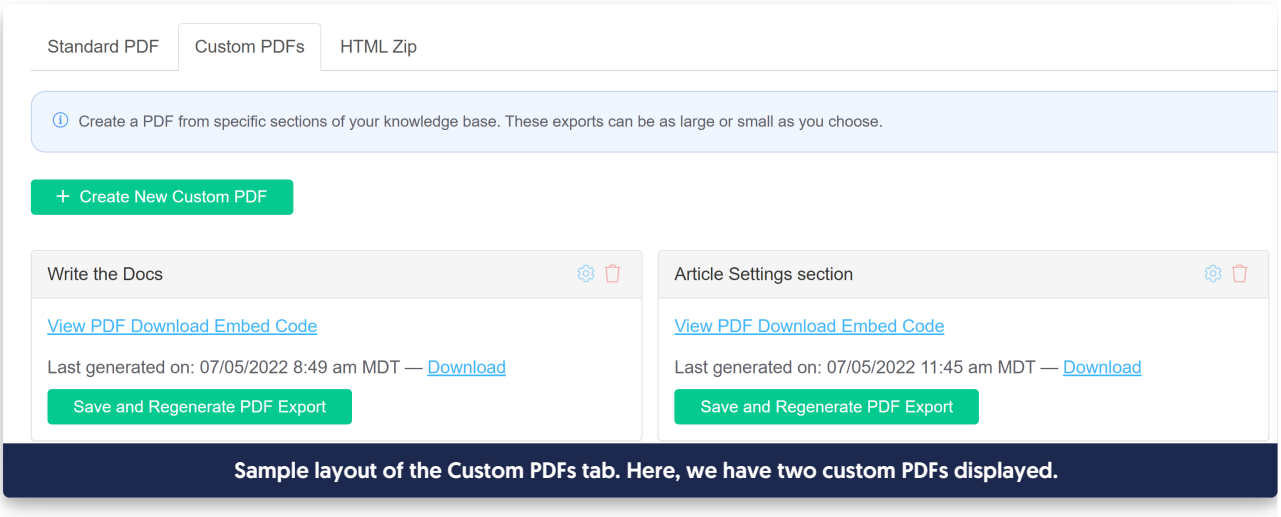
If you'd like the Standard PDF to include categories and/or articles that are restricted to reader groups, check this box and regenerate the PDF.

Custom PDF exports

Last Modified on 12/05/2024 2:07 pm EST

Custom PDFs can be created from your knowledge base content, using only the categories and articles you specify. Custom PDFs are stored and can be regenerated on demand. They're great if you want to create a curated collection of some of your content, such as for new employee or new user onboarding, quick start guides, and so on.

Custom PDFs can only include articles with a Published or Needs Review status.



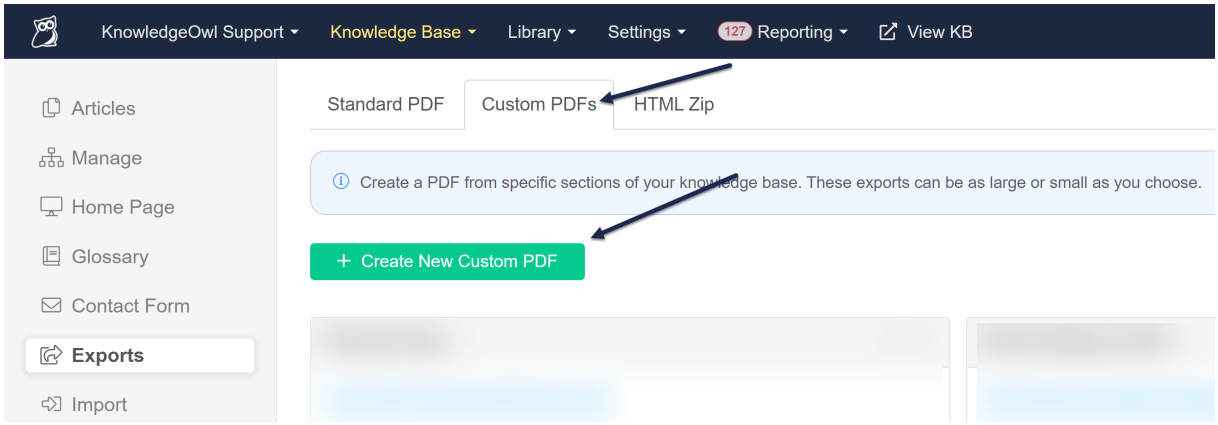
Sample layout of the Custom PDFs tab. Here, we have two custom PDFs displayed.

Custom PDFs include many of the same options of the Standard PDF:

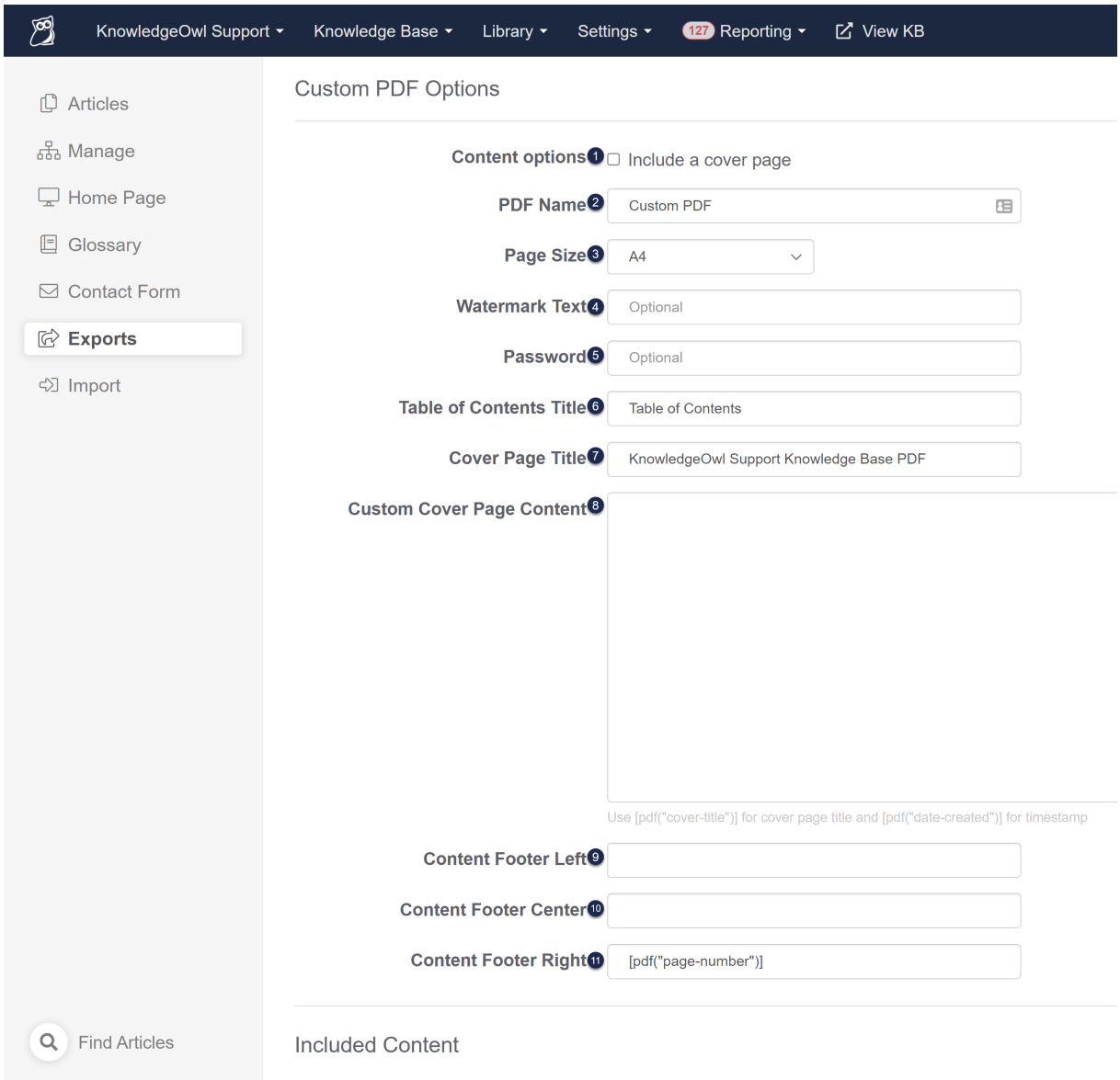
- Customizable cover page
- Specify A4 vs. US Letter page size
- Add a watermark and/or a password
- Edit the title of the table of contents
- Add a custom footer

Create a Custom PDF

1. Go to **Knowledge Base > Exports.**
2. Select the **Custom PDFs** tab.
3. Click the **+ Create New Custom PDF** button.



4. **Use the Custom PDF Options section to customize the layout of your PDF:**



   a. **Choose whether to Include a cover page using the Content options checkbox (defaults to no cover page).**

   b. **Provide a PDF Name. This name is displayed in the Custom PDF tab and is used as the file name when the PDF is downloaded.**

c. Select a **Page Size**. Options are A4 and US Letter (defaults to A4).

d. *Optional:* Add the text you'd like used as a watermark in **Watermark Text**. This text will be displayed diagonally across the page of the PDF.

e. *Optional:* If you'd like to password-protect this PDF, add a **Password**.

f. All Custom PDFs generate with a Table of Contents. By default, this page is titled "Table of Contents." You can change the page heading by editing the **Table of Contents Title**.

g. If you've included a cover page using the **Content options** checkbox at the top, edit the **Cover Page Title** to display the title you'd like. It will default to "[your knowledge base's name] Knowledge Base PDF". You can then include this wherever you'd like in the cover page by adding `[pdf("cover-title")]` into the Custom Cover Page Content.

h. If you've included a cover page using the **Content options** checkbox at the top, you can also add additional **Custom Cover Page Content** in the box provided. This will take standard HTML.

i. If you'd like anything displayed in the left section of the PDF footer, edit the **Content Footer Left** section.

j. If you'd like anything displayed in the center section of the PDF footer, edit the **Content Footer Center** section.

k. If you'd like anything displayed in the right section of the PDF footer, edit the **Content Footer Right** section.

For the Content Footer sections or the Custom Cover Page content, there are several merge codes that can help auto-add certain text. See PDF Merge Codes for a list of available merge codes and what they do.

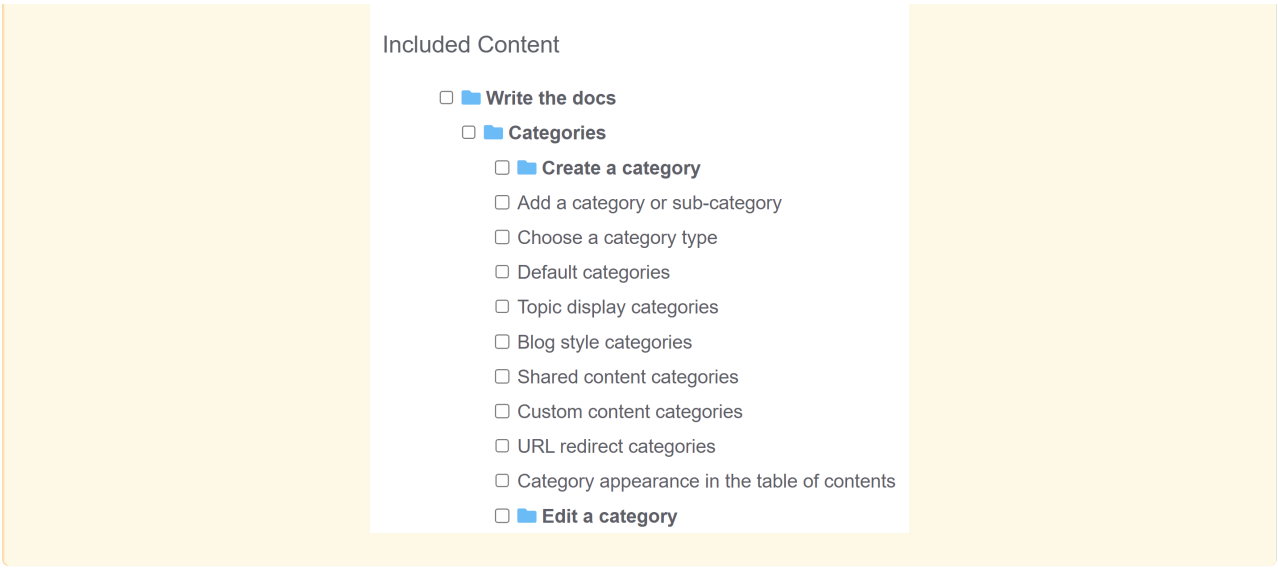
5. Once you've configured the Custom PDF Options, use the checkboxes in the **Included Content** section to select the categories or articles you'd like include. Checking the box for a category will automatically check the boxes for all subcategories or articles it contains. Unlike Standard PDFs, Custom PDFs will include restricted content if it's checked.

6. Once you've finished your selections, click the **Save and Generate PDF** button at the bottom of the page. (If you have a large knowledge base, you'll need to scroll to find this!)

7. Once the PDF is generated, you'll be kicked back to the Custom PDFs tab. A progress bar will display under your custom PDF. Once that progress bar disappears, the PDF is available for download and you'll see a different display. See Using Custom PDFs below for more info!



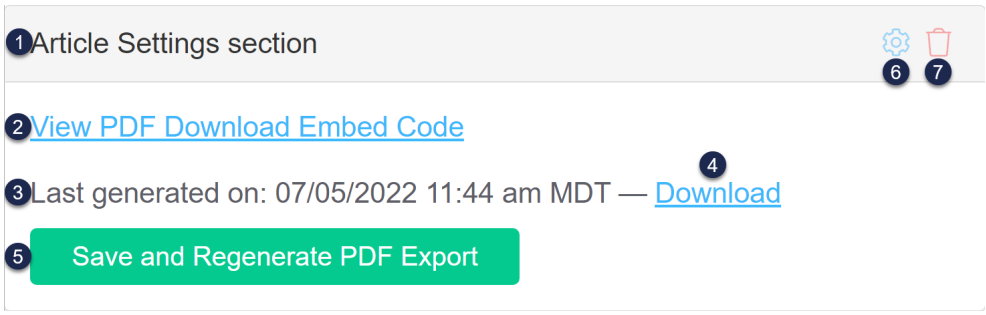
The Included Content section tries to display the content hierarchy in your knowledge base, but it has some limitations. Once you hit the third layer of categories, content will not properly indent underneath subsequent categories. So, for example, in this screenshot, all of the articles listed at the same level as "Create a category" are actually inside Create a category:



Use a Custom PDF

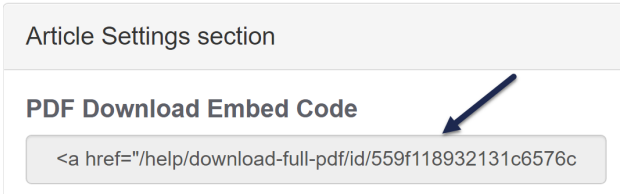
Once you've generated at least one Custom PDF, you can see all of your Custom PDFs by going to: Knowledge Base > Exports and selecting the Custom PDFs tab.

You'll see one card for each Custom PDF. Here's the anatomy of a custom PDF card:



1. **At the top of the card, the title is displayed. This pulls directly from the PDF Name field in the Custom PDF configuration.**

2. **If you click the View PDF Download Embed Code link, we'll display the HTML needed to embed this PDF somewhere in your knowledge base. Click anywhere in the code box that displays, right-click and select Copy. You can then paste this code in wherever you'd like to use it (such as in Settings > Style in one of the Custom HTML templates, or within the Code View of an individual article or category).**



3. **We'll show the date and timestamp that the PDF was last generated, so you know how up-to-date it is.**

4. **Use the Download link to download the PDF to your computer.**

5. **If you don't need to change the PDF's settings and just want to regenerate it to be sure it has the latest content, select the Save and Regenerate PDF Export button.**

6. If you'd like to open the Custom PDF to edit its configuration, name, layout, or the content it contains, select the **gear icon** in the upper right.
7. If you'd like to delete the PDF completely, select the **trashcan icon** in the upper right.

Regenerate a Custom PDF

Custom PDFs are a snapshot of your articles at the date and time your PDF is generated. If your articles change, you will want to regenerate your PDFs to update the content.

To regenerate a custom PDF:

1. Go to **Knowledge Base > Exports.**
2. Select the **Custom PDFs** tab.
3. Find the card for the custom PDF you'd like to regenerate.
4. Click the **Save and Regenerate PDF Export** button.
5. A progress bar will appear to show you the regeneration's progress. Once it's complete, the Last generated statement will reappear with a new Download link. If you have embedded the PDF in your knowledge base, regenerating it will also update the PDF located at the embed code.

If you'd like to make edits to a PDF or view the content it contains before you regenerate, use the **gear icon** in the upper right of the custom PDF card instead!

Styling PDFs

Last Modified on 05/29/2024 5:28 pm EDT

By default, PDFs inherit the styles of your knowledge base. However, you can customize some styles (such as web fonts that don't generate in PDFs well) by adding custom CSS that references the `.hg-pdf` class.

For individual article PDFs, add overall layout/style changes in **Settings > PDF**. For Standard and Custom PDF exports, add overall layout/style changes in **Knowledge Base > Exports** in the appropriate tab.

Hyperlinks in PDFs

Last Modified on 05/29/2024 5:27 pm EDT

Clickable hyperlinks will automatically generate in all three PDF types, though we have two warnings about this:

- If you are primarily using PDFs as print resources, you may want to display the full URL of a hyperlink. See Display full URL of links in PDFs for how to do so.
- Hyperlinks to same-page anchors will not work properly.

Protect your PDFs with watermarks and passwords

Last Modified on 05/29/2024 5:28 pm EDT

You have the ability to specify watermark text and a password for your PDFs.

Watermark text will be displayed diagonally across each page of the PDF.

If you add a password, a reader will have to enter that password before they can successfully open the PDF.

To add to each type of PDF:

- For Individual article PDFs, go to **Settings > PDF**. If you add a watermark or password, make a small change to a single article and re-check the PDF to see how you like it. (PDFs can take a few minutes to regenerate.) Once you're happy with the change, contact us to regenerate all your article PDFs.
- For Standard PDF export (Full PDF Download), go to **Knowledge Base > Exports**. This page should open to the Standard PDF tab and you can add your watermark or password there.
    - Once you make your changes, be sure to click the **Save and Regenerate PDF Export** button to update your Standard PDF.
- For Custom PDF exports, go to **Knowledge Base > Exports**.
    - Open the Custom PDFs tab.
    - Find the card for the custom PDF you'd like to add a watermark or password to, and select the **gear icon** to the right of the PDF's name.
    - Once you've made the changes you'd like, be sure to click the **Save and Regenerate PDF Export** button at the bottom of the page to regenerate your custom PDF with those settings!

HTML Zip export overview

Last Modified on 05/29/2024 5:28 pm EDT

The HTML Zip export creates a zip file containing files for each of your articles and folders for each category/subcategory. The export will also include an "images" folder at each level, which contains all the image files uploaded to your File Library and referenced in your articles, and the articles linked to those images will update to that path (images/file-name) rather than the URL used in your File Library.

You can decide whether to include articles in a draft publishing state.

You can use this zip export for:

- Back-ups (for redundancy, piece of mind, or audits)
- Exporting your content for import into another tool/platform

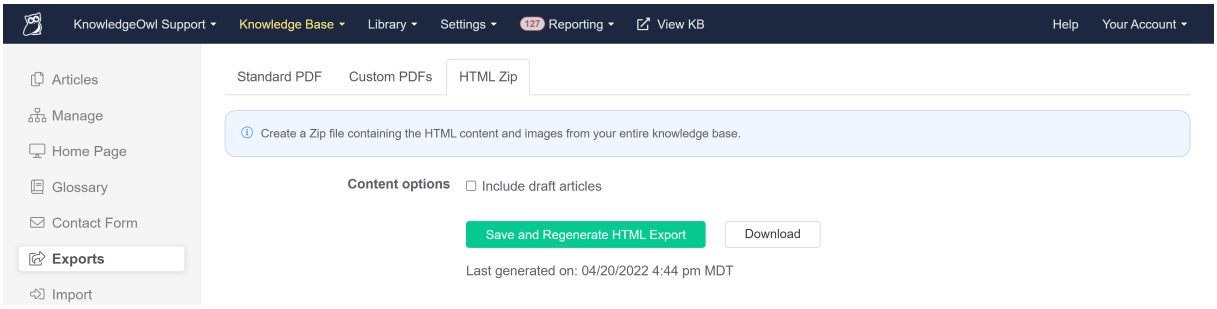
You can regenerate and download an updated HTML zip file at any time. You can also download a previously-generated export without generating a new one.

Generate an HTML Zip export

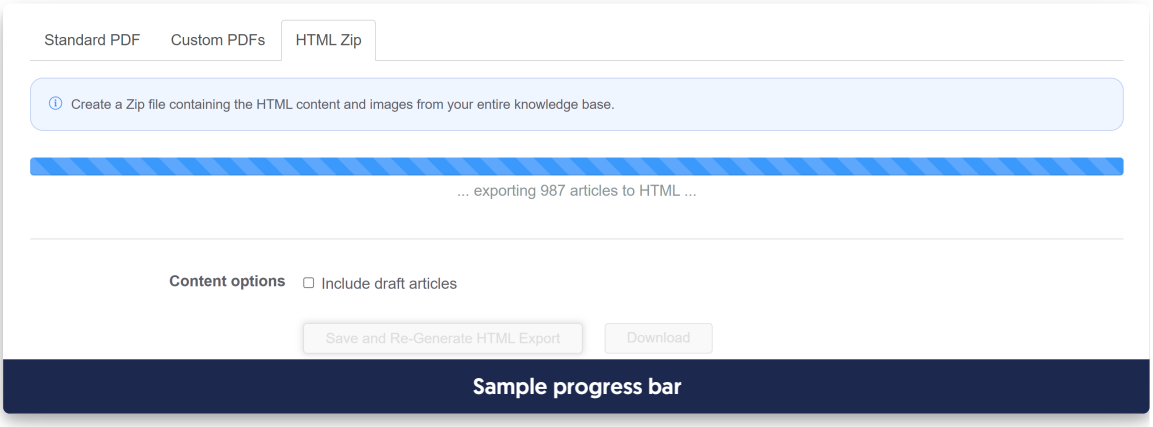
Last Modified on 05/29/2024 5:28 pm EDT

To create an HTML Zip export of your knowledge base:

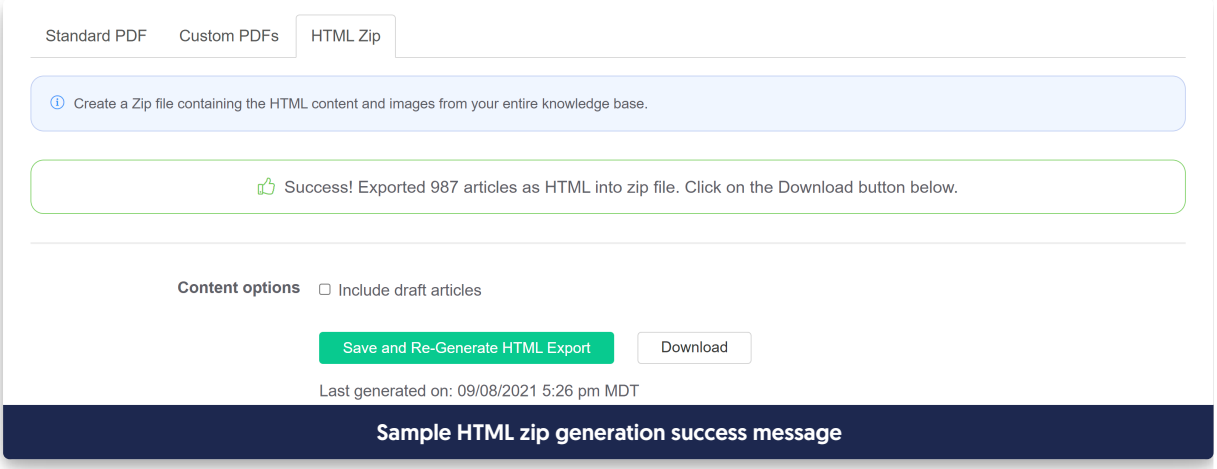
1. Go to **Knowledge Base > Exports.**
2. Open the **HTML Zip** tab.



3. By default, exports will not include draft articles. Check the box next to **Include draft articles** to include them.
4. Click the **Save and Regenerate HTML Export** button to generate a new HTML export. Once you click this button, a progress bar will appear. The message here will go through a few stages:
   a. HTML export queued
   b. exporting xxx articles to HTML



   c. generating zip file
   d. uploading zip file to server
5. Once generation is complete, a success message will appear:



Sample HTML zip generation success message

6. Click the **Download** button to download the zip export file. You can come to this page at any time to download an already-existing export, or generate a new one each time.

7. The "Last generated on" statement will show you the timestamp of the last generated export.

HTML export of categories with question marks in the title

Last Modified on 05/29/2024 5:27 pm EDT

If you have categories or subcategories with question marks in the title and you try to access those files on a Windows machine, you may notice some unusual behavior with them.

Why?

Windows does not allow folders to have question marks in them. It doesn't care where those folders come from--it doesn't handle them.

If you're using Windows' built-in zip/unzip tool to interact with zip files or unzip them, you won't see categories or subcategories with question marks in the title.

Don't worry, though! The categories and subcategories are there and were properly exported--Windows is just hiding them from you because it can't handle question marks.

How do I fix this?

For Windows users, there are two ways to bypass this issue:

Option 1

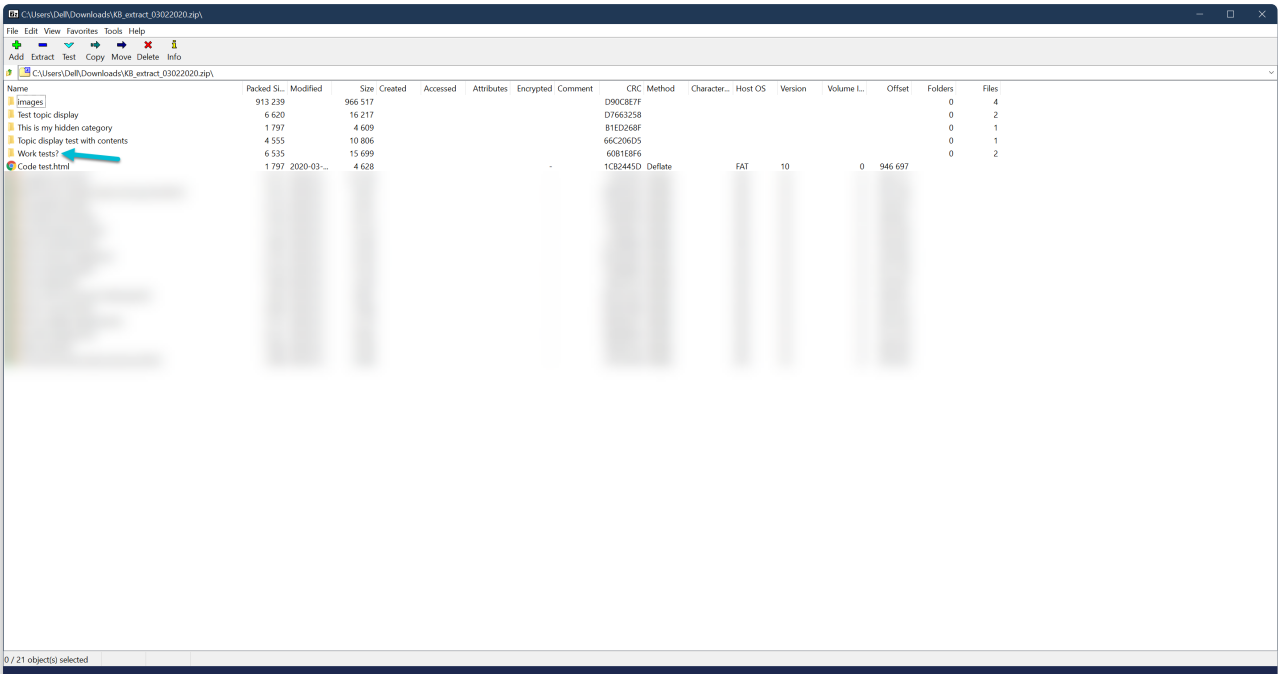
Restructure your category names so they don't have question marks. This works, but obviously there may be reasons you don't want to do that.

Option 2

Use a zipped file tool that *can* handle the question marks. We've had great luck with 7zip, which is a free, open-source solution. When you use 7zip to extract the files from a zipped folder and you have categories with question marks in them, it will create the category as a folder and replace the question mark ("?") with an underscore ("_") instead. All your content will still be accessible.

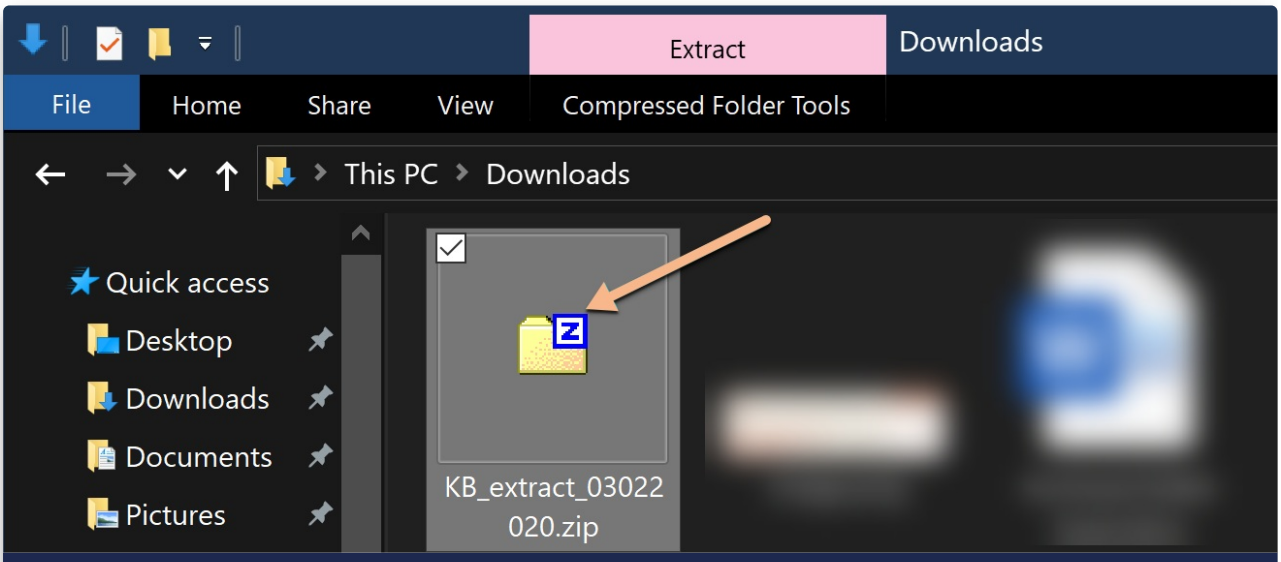
So if my original category was "How do I make changes to my account?", once I've extracted that category in 7zip, it will show up as "How do I make changes to my account_".

Even better, if you set 7zip to be the default application for .zip files, you can double-click a zipped folder without unzipping it to navigate the content, and you'll be able to see the category with the question mark directly there.



7zip navigation into .zip file shows the question mark

Zipped folders in this scenario will have a little Z icon over them:



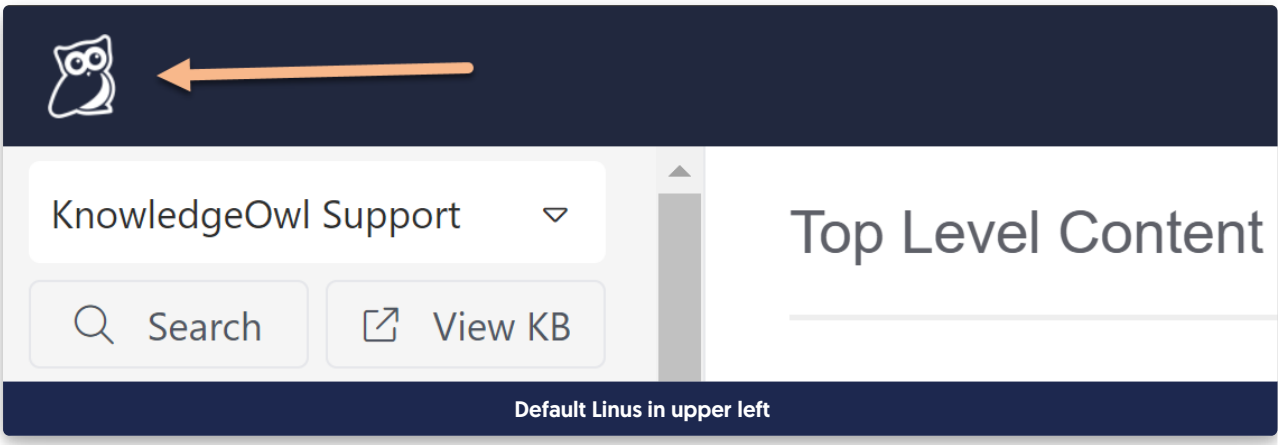
.zip file display when 7zip is your default application for .zip files

Party with Linus

Last Modified on 05/29/2024 5:28 pm EDT

In the **Delight** option under your **profile icon/name** in the upper right, we currently have one option for app delight: **Party with Linus.**

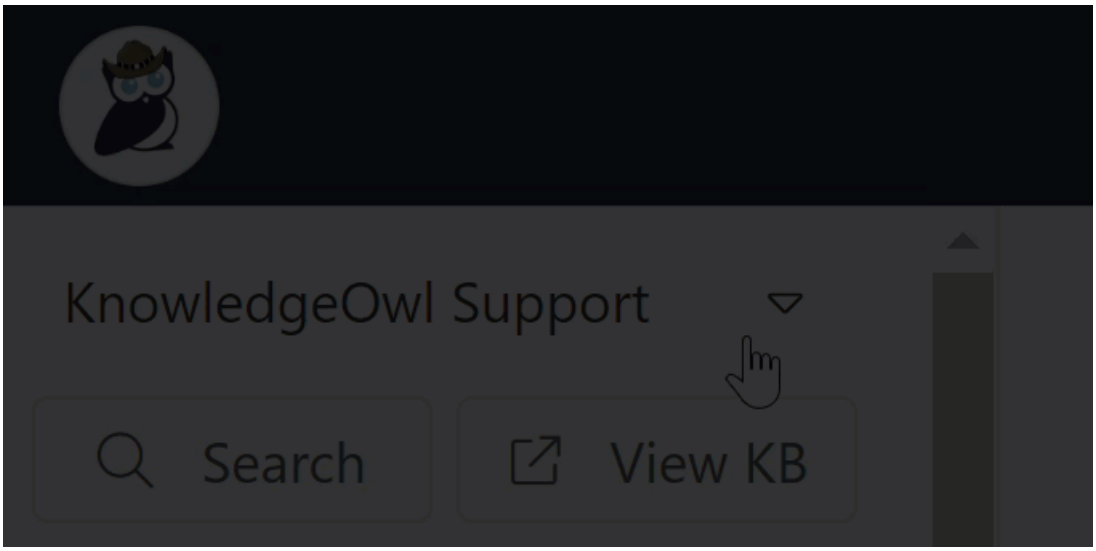
If you check the box to "Enable fun random images of Linus in the top left corner of the navigation bar" and **Update**, we'll update this version of Linus:



Default Linus in upper left

With a different random Linus as you navigate through pages.

You can hover over the random Linuses to zoom in and see him in all his cosplay glory, too:



Get started with knowledge base SEO

Last Modified on 05/29/2024 5:28 pm EDT

It's important to optimize your knowledge base for SEO if you want it to be indexed by search engines.

This will help with discoverability of your site in case readers are googling for help. It can even have the impact of attracting new customers to your product.

Proper SEO can also help with overall usability of your site because content pages will be structured more clearly.

If your knowledge base is private, find out how to exclude your knowledge base from search engines.

SEO best practices

Last Modified on 05/29/2024 5:28 pm EDT

Refer to these best practices for your knowledge base SEO:

- Add a meta description for every page
- Add a title tag for every page
- Keyword optimize your pages
- Interlink as many articles as you can in your knowledge base
- Optimize your URLs with your target keyword
- Use SEO-friendly permalinks
- Don't allow articles to have trailing slashes
- Optimize page load times
- Use bullet point and numbered lists
- Include images with alt-text

Meta descriptions

The meta description is an HTML element that search engines use to display a short description for your page/site and can contain keywords to optimize for search. This is your chance to attract organic traffic to your content with compelling copy.

Find out how to customize your meta descriptions.

Title tags

The title tag is an HTML element that search engines use to display the topic and name of your page/site and can contain keywords to optimize for search. The aim is to summarize your content or site to tell visitors what it's about. It's indexed by search engines.

Find out how to customize your title tags.

Keyword optimization

Keyword optimization is a huge topic but it's the practice of targeting certain high or medium volume keywords that readers are actually searching for online. SEO marketers find keywords using software such as the keyword planner in Google Adwords.

Optimizing a page consists of ensuring it contains your target keyword (or keyword phrase) a few times, but no more than would be natural.

The keyword should be in the page title, page URL, first paragraph, in the alt-text of any images and scattered throughout the text.

Interlinking articles

It's SEO best practice to interlink your articles internally so search engines can crawl your site more effectively. It's a part of your internal or on-site SEO strategy, like meta descriptions and title tags.

It also enhances discoverability of your content, readers spend more time on your site, and this improves your SEO.

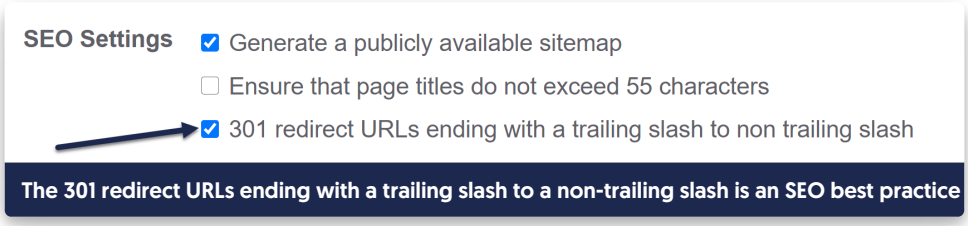
Optimizing URLs

URLs are an important part of your SEO strategy. They should be reasonably short and contain your targeted keywords. If you're not targeting any specific keywords (although you should be) make sure the URL contains keywords that define the topic of your content.

Don't allow articles to have trailing slashes

In the land of search engine indexing, a trailing slash (such as https://support.knowledgeowl.com/help/seo-guide#best-practices/) is treated as a directory. The same URL without a trailing slash is treated as a file or page. Those two URLs are indexed and tracked separately, though, so if you have readers who have somehow bookmarked or typed in an article URL with a "/" at the end, it won't factor into SEO in the same way. Forcing these trailing slash URLs to redirect to the normal article permalink maximizes your SEO.

We have a setting to control this in **Settings > Basic**. Scroll to the SEO Settings section, check the box next to "301 redirect URLs ending with a trailing slash to non trailing slash", and Save.



Lists

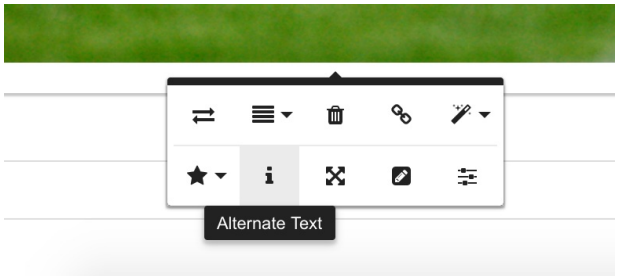
Using ordered and unordered lists is a great way to structure your knowledge base content. Also known as a semantic structure, bullet points and numbered lists make your content more readable.

Within your articles, try to break down the information in such a way that you can present it in lists. Add in lists using the WYSIWYG editor for your articles.

Optimizing images

If you include an image in your knowledge base content, a good rule of thumb is to also include an alt text. The alt text is an HTML tag that displays if your image doesn't load, or appears if you hover the cursor above the image. It also gets indexed by search engines.

To add an alt text to your image, edit the page in your your knowledge base and click on the image.



Select the 'i' option to type in your text. This should be a short description of your image that contains your target keyword or keyword phrase.

Page load times

Google uses page load times as a key ranking signal. If your site loads too slowly this will negatively impact the overall SEO ranking of your site. KnowledgeOwl is already optimized for loading speed but you can avoid doing things that slow your site.

For example, it's important to compress your images before you upload them to keep page load times low. Resize them in an editor so that they're no more than around 1000 x 1000 pixels maximum.

Remember, if you're pasting in code from another editor such as Microsoft Word, doing so will add in lots of unnecessary code in the background. Copy and paste into a plain text source like Notepad, or select 'paste without formatting' when you right click.

SEO features of KnowledgeOwl

Last Modified on 05/29/2024 5:28 pm EDT

KnowledgeOwl has several features to help you optimize your knowledge base for SEO.

These are:

- Title tags
- Meta descriptions
- Sitemaps

Title tags

The title tag is an HTML element that search engines use to display the topic and name of your page/site and can contain keywords to optimize for search. Find out how to customize your title tags.

Meta Descriptions

The meta description is an HTML element that search engines use to display a short description for your page/site and can contain keywords to optimize for search. Find out how to customize your meta descriptions.

Sitemaps

You use a sitemap to tell Google to index your website and how to structure the information it contains. Find out how to generate your sitemap.

Promote your knowledge base

Last Modified on 05/29/2024 5:28 pm EDT

The saddest knowledge base is one with no traffic. While heavy traffic to certain types of content may indicate a problem or an opportunity to make things easier, there will always be customers who need self-service.

Promote your knowledge base to your customer base and beyond by:

- Sending out weekly content highlights in your subscriber newsletter
- Promoting your content on social media
- Linking to your knowledge base from your main website
- Linking to your knowledge base in customer support emails

It's also good for SEO. Successfully promoting your knowledge base on social media and in your newsletter sends positive signals to search engines about how to rank your content.

Make your knowledge base public

Last Modified on 05/29/2024 5:28 pm EDT

Your knowledge base is already optimized for search engine indexing. This means search engines can already find your site and display it to readers in search.

If for any reason your knowledge base is not public already, you can change that in the site settings. For more information on how to do this see here.

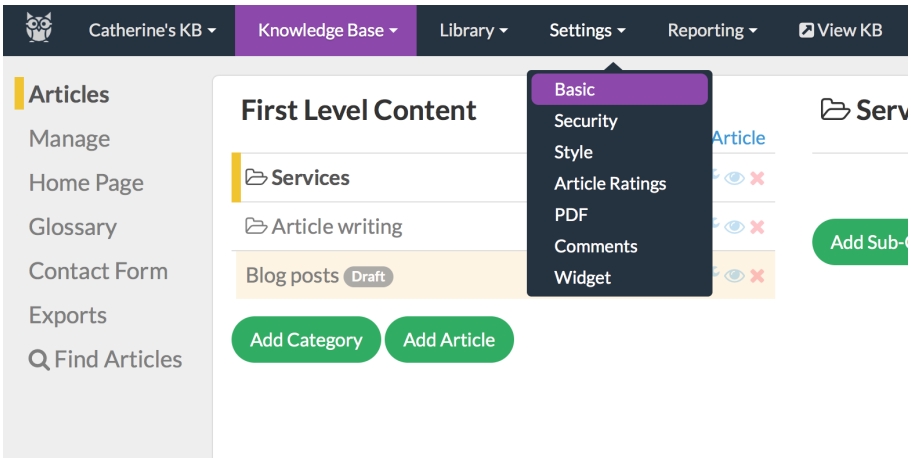
When you are ready to launch your knowledge base, you should generate a sitemap. The sitemap is what you submit to Google to tell its search engines to index your site.

Generate your sitemap

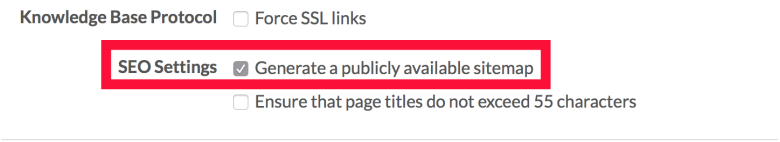
Last Modified on 05/29/2024 5:28 pm EDT

You use a sitemap to tell Google to crawl your website. It's an XML file representing the structure of your website content.

You can generate a publicly available sitemap under **Settings > Basic**.



Then you check the box next to **SEO Settings**, called 'generate a publicly available sitemap'.



You can access your sitemap anytime once you've checked this box. Add "/help/sitemap.xml" to the end of your domain, like this:

```
{yoursubdomain}.knowledgeowl.com/help/sitemap.xml
```

Here's ours as an example: http://support.knowledgeowl.com/help/sitemap.xml

A sitemap looks like this:

This XML file does not appear to have any style information associated with it. The document tree is shown below.


```
▼<urlset xmlns="http://www.sitemaps.org/schemas/sitemap/0.9">
  ▼<url>
     <loc>https://support.knowledgeowl.com/help</loc>
     <priority>1.0</priority>
     <changefreq>daily</changefreq>
     <lastmod>2017-10-27</lastmod>
   </url>
  ▼<url>
     <loc>https://support.knowledgeowl.com/help/comments</loc>
     <priority>0.5</priority>
     <changefreq>monthly</changefreq>
     <lastmod>2015-07-12</lastmod>
   </url>
  ▼<url>
     <loc>https://support.knowledgeowl.com/help/content</loc>
     <priority>0.5</priority>
     <changefreq>monthly</changefreq>
     <lastmod>2015-07-12</lastmod>
   </url>
  ▼<url>
    ▼<loc>
       https://support.knowledgeowl.com/help/exports-and-backups
     </loc>
     <priority>0.5</priority>
     <changefreq>monthly</changefreq>
     <lastmod>2015-07-12</lastmod>
   </url>
  ▼<url>
     <loc>https://support.knowledgeowl.com/help/pdfs</loc>
     <priority>0.5</priority>
     <changefreq>monthly</changefreq>
     <lastmod>2017-10-27</lastmod>
   </url>
  ▼<url>
    ▼<loc>
       https://support.knowledgeowl.com/help/article-formatting
     </loc>
     <priority>0.5</priority>
     <changefreq>monthly</changefreq>
```


When you generate your sitemap in KnowledgeOwl, each page or article on your site is given a unique title. This title includes your knowledge base name, and the name of the article or page.

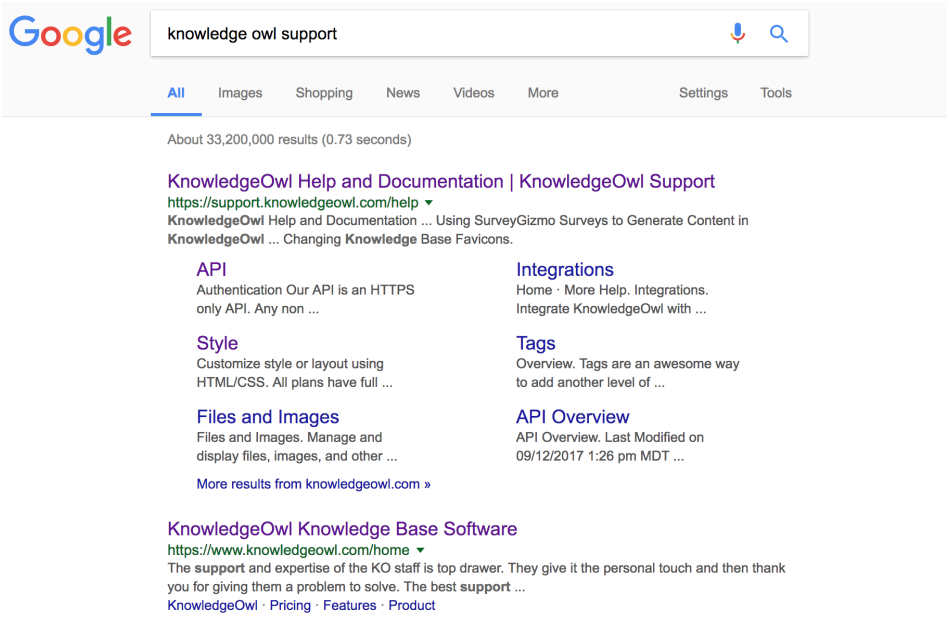
Article titles are also automatically truncated (shortened) to meet best practice guidelines for title length (55 characters). Articles that contain similar content are given a canonical link tag (an HTML link tag with attribute rel=canonical) to avoid duplicate content issues that would harm your SEO rankings.

Once you've got hold of your sitemap URL, paste it into Google Search Console so it can update your site.

Optimize your homepage

Last Modified on 07/17/2024 1:27 pm EDT

Your homepage is the most important page to optimize for SEO. This is what people will see first coming up in the search results page.



Notice how information about the structure of our knowledge base is being pulled in to the results, including page titles and meta descriptions. It's giving an idea of content contained deeper within our knowledge base.

This is one of the reasons that you need to submit your sitemap to Google. It helps Google understand your site and better index your content.

Update title tag and meta description

You want to set up a great title tag and meta description for your homepage.

This is where great copywriting skills come into play. Keep it brief and only include the most necessary information. Don't repeat yourself.

To update your homepage title tag and meta description:

1. In the upper left navigation, go to **Homepage**.
2. Set the **Title Tag**. The title tag is the name of your knowledge base that is used in search results.
3. Set the **Meta Description**. The meta description is the preview or description of your knowledge base displayed in search results. Search engines can choose to display a different preview snippet rather than your meta description. While it might not always be used, the meta description is still important because as it helps Google understand what *you* think your page is about.

4. If either field is too long, your text will be shortened with ellipses, so it's best to keep within the character limit.

5. Once you've finished making changes, be sure to **Save** them.

Once you've updated either of these fields, it will take some time for Google to reflect these changes. It could take up to a week but is often as quick as 30 minutes. If you want to expedite the process, you can ask Google to recrawl your site or individual URLs.

Custom title tags and meta descriptions

Last Modified on 05/29/2024 5:28 pm EDT

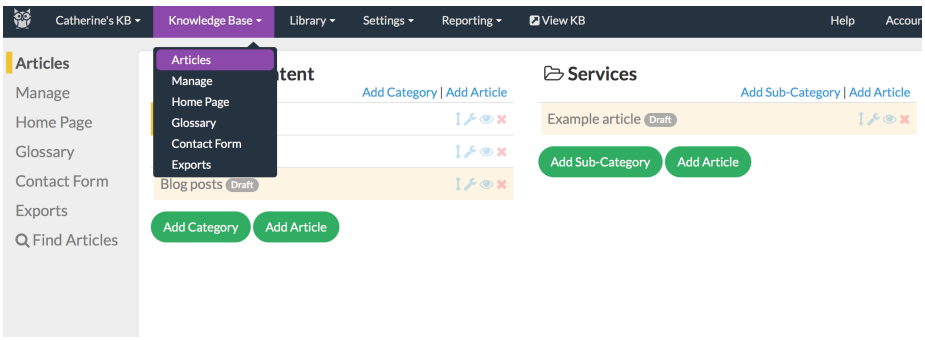
The default title tag for every category and article title is "Article Title | KB Name". We do not automatically generate meta descriptions, so Google will choose one for you if it's not specified.

For SEO reason, you might not want to stick with the default titles and meta descriptions for your pages and categories in your knowledge base. Tailor these to contain as much information as possible about the content contained within them.

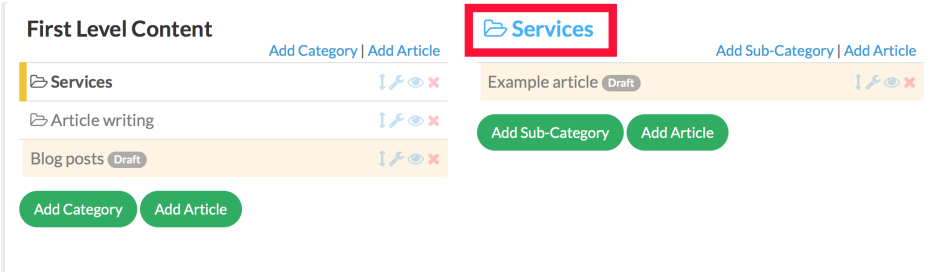
It's helpful to fill in these fields yourself because they will be indexed by search engines, and also be pulled in by social media when someone shares a page.

You can create custom title tags and meta descriptions on individual categories and articles in the editor.

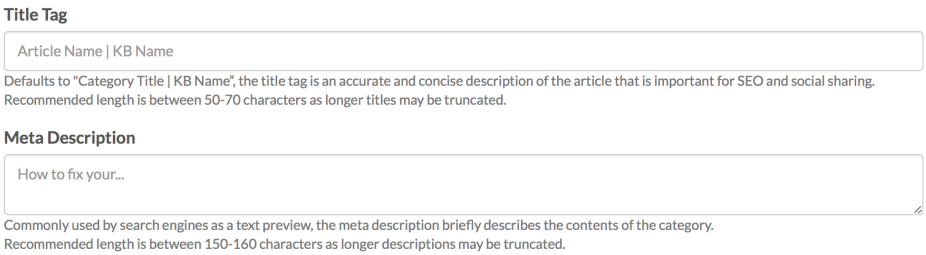
For categories, go to **Knowledge base > Articles** by selecting it from the top menu.



Edit the category by clicking on the wrench icon, or by clicking on its title displayed in the right hand column.



This brings up the editing screen. Scroll to the bottom of the editor where you can enter your custom text into the title tag and meta description field.



The process is similar for editing the title tags for pages or articles. Navigate to the relevant page in your knowledge base and scroll down to the Title Tag and Meta Description fields.

Public Sitemaps and SEO

Last Modified on 05/29/2024 5:28 pm EDT

Your knowledge base is already optimized for search engine indexing and optimization.

- Each page is given a unique title that include the name of the article or page and your knowledge base name.
- Article titles are truncated in your page title to meet best practice guidelines in terms of length (55 characters).
- Shared articles use a canonical link tag to avoid duplicate content issues.

You can also generate a publicly available sitemap under **Settings > Basic**. Once generated, you can access your sitemap by adding "/help/sitemap.xml" to the end of your domain, like this: *{yoursubdomain}.knowledgeowl.com/help/sitemap.xml.* Here is ours: https://support.knowledgeowl.com/help/sitemap.xml

Private sites cannot be indexed by search engines. To make sure search engines don't index your public site:

1. Go to **Settings > Style**.
2. Below the Preview pane, be sure **Custom <Head>** is selected.
3. Copy the code below and paste it anywhere into the Custom Head:

```
<meta name="robots" content="noindex">
```

4. Be sure to **Save** your changes.

Duplicate content

Last Modified on 05/29/2024 5:28 pm EDT

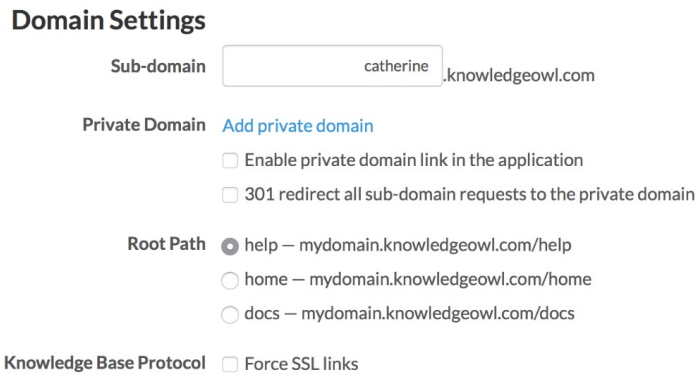
Duplicate content is bad for SEO. This is any page that contains the same content as another page because it will reduce traffic to both pages if the search engine doesn't know which one to index.

Avoiding duplicate content on private domains

If you have set up a private domain like "docs.mycompany.com", you will also still have your KO subdomain like "mycompany.knowledgeowl.com". If Google crawls both sites, it will be flagged as duplicate content.

To redirect all your KO subdomain traffic to your private domain and avoid duplicate content problems:

1. Navigate to **Settings** > **Basic** from the top menu.
2. Scroll down to **Domain Settings**.



3. Check the box next to **Enable private domain link in the application**.
4. Check the box next to **301 redirect all sub-domain requests to the private domain**.
5. Be sure to **Save** your changes.

This will ensure that your KO links always use your private domain, and you can avoid any duplicate content problems with Google.

See Domain Settings for more information on settings in this section.

Prevent search engines from indexing your site and content

Last Modified on 05/29/2024 5:28 pm EDT

Private sites cannot be indexed by search engines. But if your knowledge base is public, you may want to prevent Google and other search engines from indexing either:

- Your entire site
- Individual pages

Below, we walk through instructions for each approach.

Block entire site from search indexing

To ensure that your entire public knowledge base isn't indexed for search:

1. Go to **Settings > Style**.
2. Below the preview pane, be sure **Custom <Head>** is selected.
3. Copy the code below and paste it into that pane:

```
<meta name="robots" content="noindex">
```

4. Be sure to **Save** your changes.

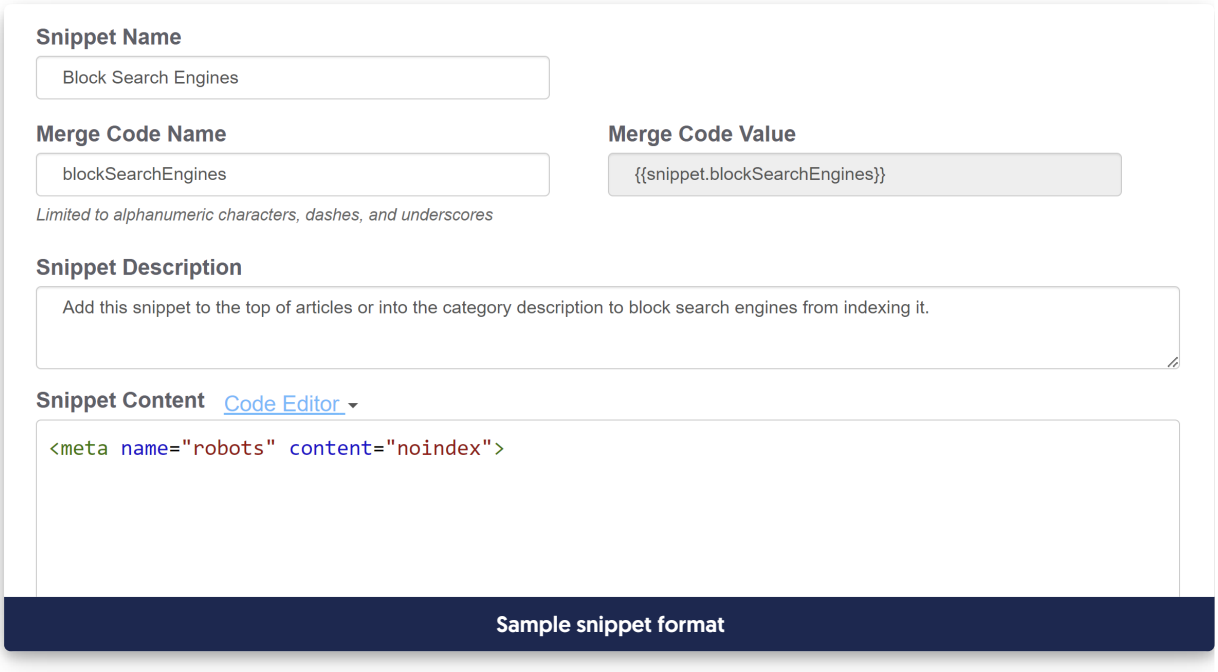
Block individual pages from search indexing

If, on the other hand, you only want to block individual pages (like articles or categories) from search engines' indexing:

1. Go to **Library > Snippets**.
2. Click the **+ Create New Snippet** button to begin creating a new snippet.
3. Use any **Snippet Name** you'd like. Here, we use "Block Search Engines."
4. *Optional:* Add a **Snippet Description**. Here, we use "Add this snippet to the top of articles or into the category description to block search engines from indexing it."
5. In the **Snippet Content** dropdown, select **Code Editor**. (It usually defaults to WYSIWYG Editor.)
6. Copy the code below and paste it into the Code Editor.

```
<meta name="robots" content="noindex">
```

7. **Your snippet should look something like this:**



8. **Once you're done, be sure to click the Create button to finish creating your snippet.**

With your snippet created, you can add it into the start of articles or custom content categories above all other text using the Insert Snippet control in the editor. See Using snippets for more information.

To add the snippet to any other category type:

1. **Open the snippet from Library > Snippets.**
2. **Copy the Merge Code Value.**
3. **Paste that into the Description of the category you want hidden from search.**
4. **Save the category.**
5. **If the category contains articles, you'll want to add the snippet into each article in the category, too.**

Measure SEO performance

Last Modified on 05/29/2024 5:28 pm EDT

Google Analytics is the top free tool to measure the performance of your knowledge base.

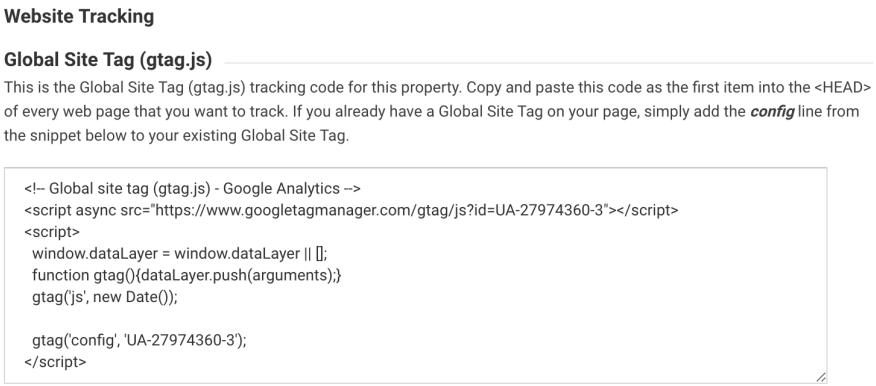
Make sure you set up an account and then create a property for your knowledge base. Select the option for tracking a 'dynamic website' when you create your property.

Once you've opened your account and set up your property, generate the code you need in your Google Analytics account.

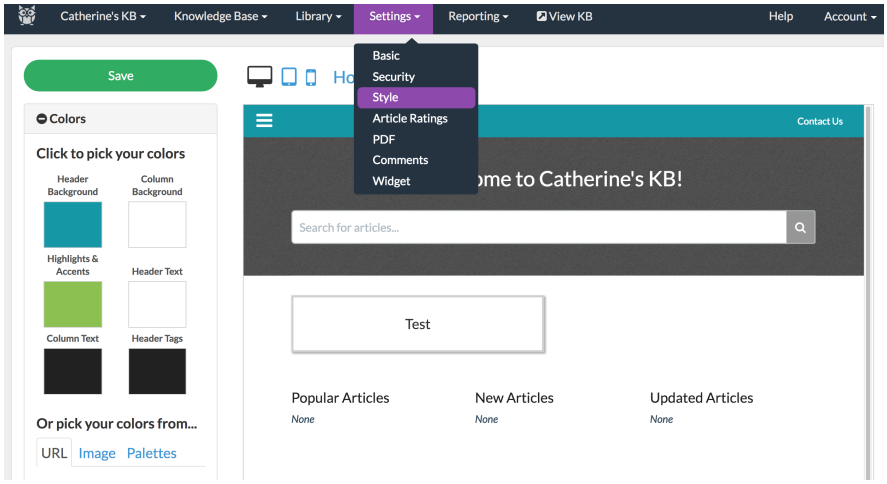
If you don't know how to do this, open your Google Analytics account.

- Click on your chosen property (website) in the home screen.
- Click on the 'Admin' button symbolized by the cog on the bottom left of the screen.
- Navigate to **Tracking info > Tracking code.**
- Highlight the tracking code snippet in the next screen that opens.

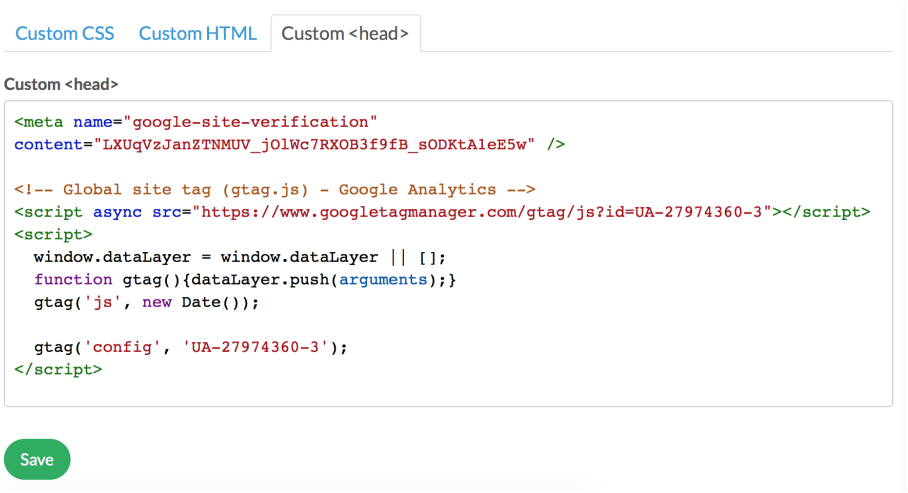
It should look like this:



Copy and paste this code snippet into the **<head>** tag of your knowledge base. To reach the **<head>** tag, navigate to **Settings > Style.**



Scroll down to the **Custom <head>** tab and paste in your tracking code. It should look something like this:



Hit save and you'll be good to go.

Metrics

Start measuring these metrics using Google Analytics:

- **Organic search traffic**
- **Page views**
- **Bounce rate**

Organic search traffic

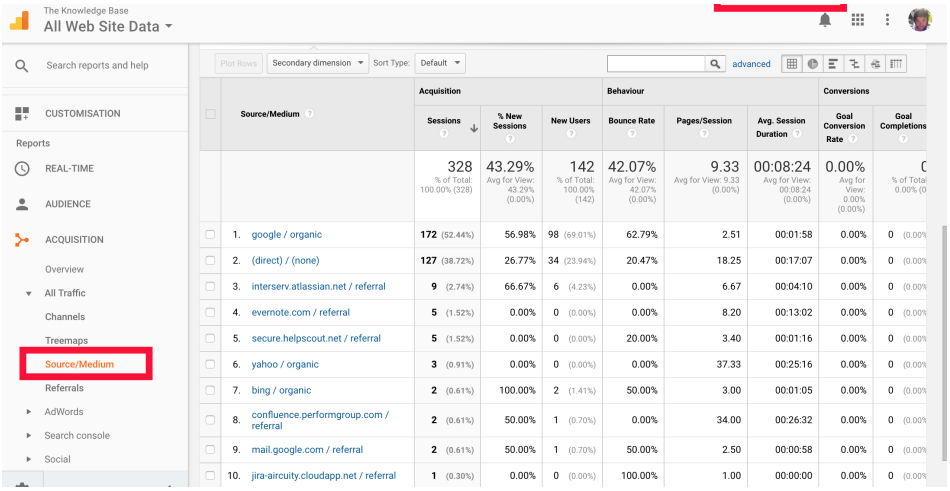
This is probably the most important way to measure the performance of your knowledge base. Organic traffic is the number of people who are naturally discovering your website in the search engine results pages.

You can look at your numbers over time to see if your performance has improved. You can see the landing pages that most of your traffic is coming to. Increasing your knowledge base traffic can be a mixed bag.

On the one hand, it can mean more people are finding your content and it's helping them solve their problems. On the other hand, more knowledge base searches can indicate more problems.

The key is to see it all in context.

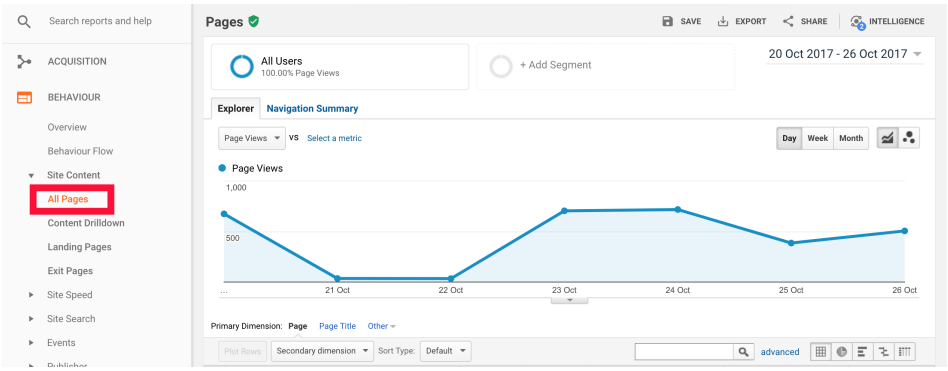
Navigate to **Acquisition > Source/Medium.**



This enables you to see the proportion of your traffic that comes from different types of sources. In our case, we're interested in organic traffic from Google, which is the number one result.

Page views

Navigate to **Behaviour > All pages.**



Scroll down the same screen to get to a breakdown of all your page traffic to see your most popular pages:

	Page	Page Views	Unique Page Views	Avg. Time on Page	Entrances	Bounce Rate	% Exit	Page Value
		3,059 % of Total: 100.00% (3,059)	817 % of Total: 100.00% (817)	00:01:01 Avg for View: 00:01:01 (0.00%)	328 % of Total: 100.00% (328)	42.07% Avg for View: 42.07% (0.00%)	10.72% Avg for View: 10.72% (0.00%)	US$0.00 % of Total: 0.00% (US$0.00)
1.	/help/fetch-article/hash/customise-your-knowledge-base-styles-or-layout-using-htmlcss?widget=true	284 (9.28%)	4 (0.49%)	00:00:41	3 (0.91%)	0.00%	1.06%	US$0.00 (0.00%)
2.	/help/fetch-article/hash/automatically-provide-definitions-in-articles?widget=true	226 (7.39%)	12 (1.47%)	00:01:20	11 (3.35%)	0.00%	4.87%	US$0.00 (0.00%)
3.	/help/fetch-article/hash/snippets?widget=true	212 (6.93%)	9 (1.10%)	00:01:09	7 (2.13%)	0.00%	3.30%	US$0.00 (0.00%)
4.	/help/fetch-article/hash/populate-the-glossary?widget=true	189 (6.18%)	2 (0.24%)	00:00:29	1 (0.30%)	0.00%	1.06%	US$0.00 (0.00%)
5.	/help/fetch-article/hash/individual-article-pdfs?widget=true	186 (6.08%)	4 (0.49%)	00:00:58	3 (0.91%)	0.00%	2.15%	US$0.00 (0.00%)
6.	/help/fetch-article?hash=include-pdf-files&widget=true	154 (5.03%)	9 (1.10%)	00:00:48	7 (2.13%)	0.00%	5.84%	US$0.00 (0.00%)
7.	/help/fetch-article?hash=homepage-overview&widget=true	124 (4.05%)	2 (0.24%)	00:00:24	1 (0.30%)	0.00%	0.81%	US$0.00 (0.00%)
8.	/help/search/	121 (3.96%)	42 (5.14%)	00:00:51	2 (0.61%)	50.00%	4.96%	US$0.00 (0.00%)

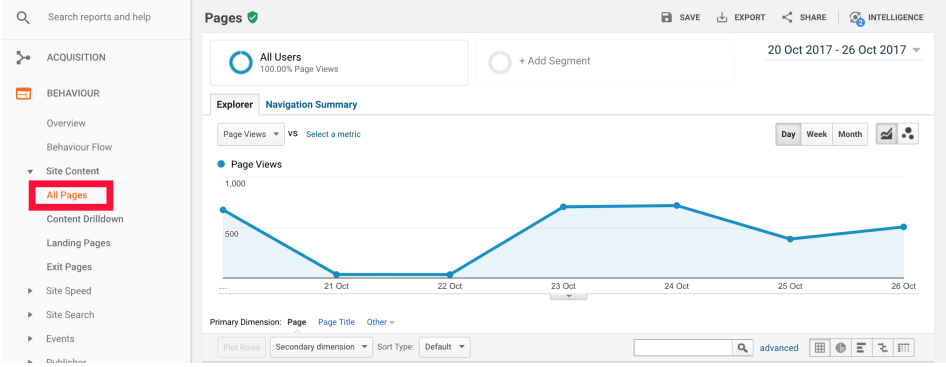
Change the time frame in the top right hand corner to view your traffic over different lengths of time.

Bounce rate

Your bounce rate is calculated by the number of readers that leave your site after viewing only a single page for 0 seconds. This indicates to the search engine that your content was not relevant, and has a negative impact on your ranking.

Your aim is to lower your bounce rate as much as possible. If you identify any pages with a high bounce rate, you need to analyse why that is and take steps to fix it.

To see your bounce rate, head over to Google Analytics. Navigate to Behavior > All pages.



Scroll down the same screen to get to a breakdown of all your page traffic to see your pages:

	Page	Page Views	Unique Page Views	Avg. Time on Page	Entrances	Bounce Rate	% Exit	Page Value
		3,059 % of Total: 100.00% (3,059)	817 % of Total: 100.00% (817)	00:01:01 Avg for View: 00:01:01 (0.00%)	328 % of Total: 100.00% (328)	42.07% Avg for View: 42.07% (0.00%)	10.72% Avg for View: 10.72% (0.00%)	US$0.00 % of Total: 0.00% (US$0.00)
1.	/help/fetch-article/hash/customise-your-knowledge-base-styles-or-layout-using-htmlcss?widget=true	284 (9.28%)	4 (0.49%)	00:00:41	3 (0.91%)	0.00%	1.06%	US$0.00 (0.00%)
2.	/help/fetch-article/hash/automatically-provide-definitions-in-articles?widget=true	226 (7.39%)	12 (1.47%)	00:01:20	11 (3.35%)	0.00%	4.87%	US$0.00 (0.00%)
3.	/help/fetch-article/hash/snippets?widget=true	212 (6.93%)	9 (1.10%)	00:01:09	7 (2.13%)	0.00%	3.30%	US$0.00 (0.00%)
4.	/help/fetch-article/hash/populate-the-glossary?widget=true	189 (6.18%)	2 (0.24%)	00:00:29	1 (0.30%)	0.00%	1.06%	US$0.00 (0.00%)
5.	/help/fetch-article/hash/individual-article-pdfs?widget=true	186 (6.08%)	4 (0.49%)	00:00:58	3 (0.91%)	0.00%	2.15%	US$0.00 (0.00%)
6.	/help/fetch-article?hash=include-pdf-files&widget=true	154 (5.03%)	9 (1.10%)	00:00:48	7 (2.13%)	0.00%	5.84%	US$0.00 (0.00%)
7.	/help/fetch-article?hash=homepage-overview&widget=true	124 (4.05%)	2 (0.24%)	00:00:24	1 (0.30%)	0.00%	0.81%	US$0.00 (0.00%)
8.	/help/search/	121 (3.96%)	42 (5.14%)	00:00:51	2 (0.61%)	50.00%	4.96%	US$0.00 (0.00%)

Your bounce rate is the third column from the right.

Google Search Console

Last Modified on 05/29/2024 5:28 pm EDT

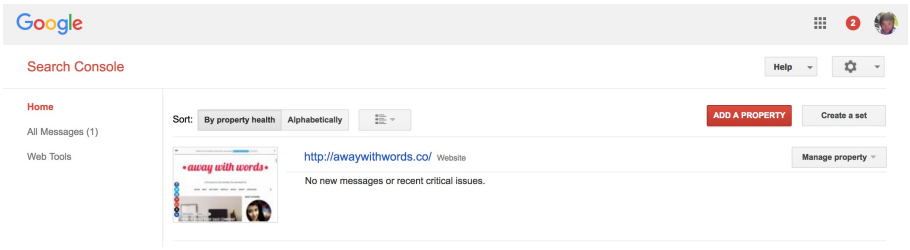
Google Search Console is a popular tool used in SEO to track a website's search performance. Since your knowledge base is a website, you can use it to track your knowledge base's search performance too!

Search Console can tell you which pages of your kb are indexed by Google for search. While the primary use case is to make sure that your pages are being successfully indexed, you can also use it to make sure your site is not being indexed. If you have a kb or pages you want removed from Google, you can also request removal.

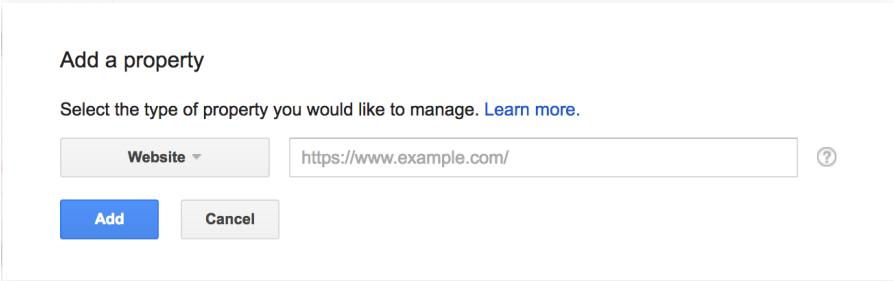
The search console can also tell you what keywords your knowledge base is ranking for and in what position. This means set keywords that are bringing your site's pages up in the search engine results page, and resulting in people clicking on those links.

To set up your knowledge base on the console, head over to the console and make an account if you haven't already.

In the homepage, click on 'Add Property'.

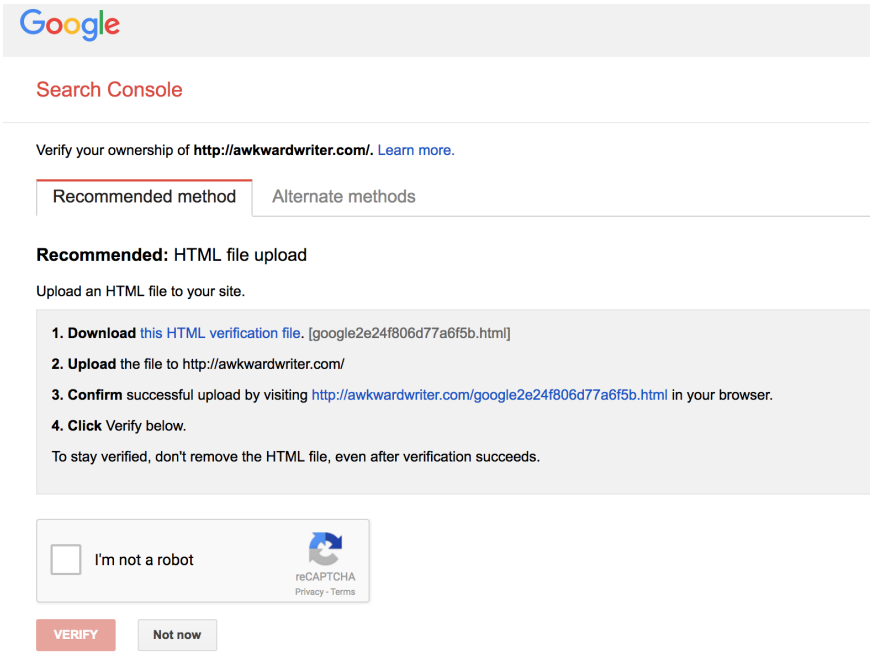


In the next screen, make sure you're adding a website and type in the preferred URL for your knowledge base:

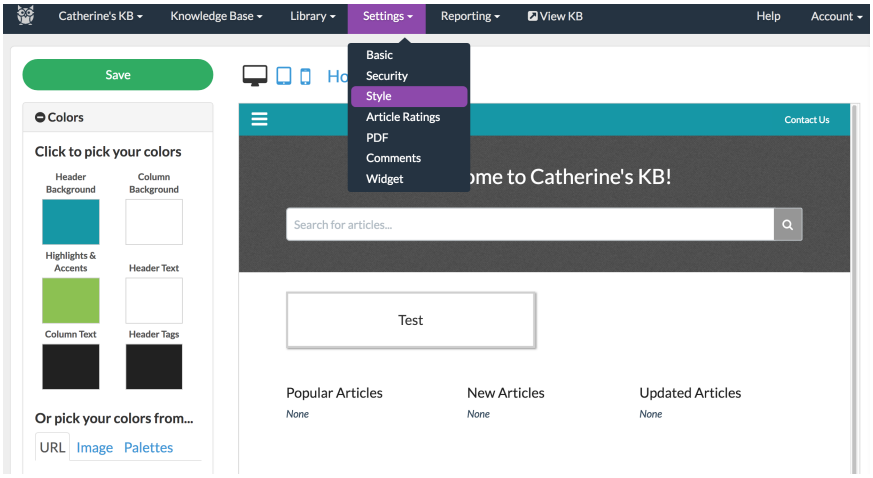


You will then need to verify you are the owner of the knowledge base by adding some HTML to your website header tag.

When the search console asks you to verify, switch to the 'alternate methods' tab. Select 'HTML tag' and copy the unique HTML code it generates to your clipboard.



Head back over to the KnowledgeOwl CMS and select Settings > Style from the top menu.



Scroll down to the custom CSS and HTML editor, and toggle to Custom <head>. Paste your code into this field and click save. It should look something like this:



You’re all set up! You should see this screen after clicking ‘verify’ in the Google Search Console.

How the widget works

Last Modified on 05/29/2024 5:28 pm EDT

As of August 2022, we have deprecated the **Legacy** and **Modern** widgets. See Deprecation of Modern & Legacy widget for more information.

One of the biggest concerns folks have when adopting a knowledge base is that toughest of questions: how do I get people to actually use my documentation? Very often, requiring that folks go to yet another website--like your KnowledgeOwl knowledge base--seems like an additional step that will prevent people from really getting the most out of your documentation.

That's where our knowledge base widget comes in handy. Basically, we generate some code so that you can embed your knowledge base in other websites, applications, etc.

The widget will show Popular Articles, let readers search for articles, and can also suggest articles based on the page in your website/application that they're currently on. If you're using our Contact Form, it can also open the Contact Form and let readers send you a message.

How to use the widget

First, you'll configure the widget to your liking in Settings > Widget, using the Modern Widget option.

Then, once you've saved those configurations, copy the embed code provided at the bottom. Give this code to your developers to embed in your website, software application, etc. (We recommend tying it to a button or a link, but there are all kinds of possibilities.) See Widget Installation for more information.

Once your developers have added the embed code and properly tied it to something in your website/application (such as a button, link, etc.), your readers will be able to use the widget.

Note: by default, the widget will not inherit the CSS styling of your knowledge base, but the CSS styling of the website or application that you've embedded it in. So you may need to have your developers update your website/application styles to style the widget.

If you want to set a list of recommended articles for pages in your website/application, see: Pages to Recommend On (Contextual Help)

Widget Installation

Last Modified on 05/29/2024 5:28 pm EDT



As of August 2022, we have deprecated the **Legacy** and **Modern** widgets. See Deprecation of Modern & Legacy widget for more information.

To install the widget in your site or application, you will need to have access to make updates to the HTML code. Once you have access, follow these steps to install the widget:

1. In KnowledgeOwl go to **Settings > Widget**.
2. Configure the widget to your liking. Save.
3. Scroll down to where the "Modern Embed Code" section is located and click in the text area to highlight the code. Copy all the code to your clipboard.
4. In your site or application, locate the closing </body> tag and paste the embed code right above it. If you don't want the widget to run on every page you can insert the code inside of the body tags on any page you wish the widget to run.
5. Verify that the widget styles are consistent with the rest of your site. By default, the widget will inherit the CSS styles from the site it's embedded on, so you may need to update styles to get the correct look and feel to match your site or application's branding.



NOTE: The widget will accept custom variables to be passed into it that can be used for things like showing conditional content. The syntax for setting these custom fields is displayed in the code itself under "Optional Custom Variable Example". The custom variable "**cust_email**" can be used to pre-fill the email address field used in the contact form portion of the widget.

Use the Modern Widget for Contextual Help: Recommend on Pages

Last Modified on 05/29/2024 5:28 pm EDT

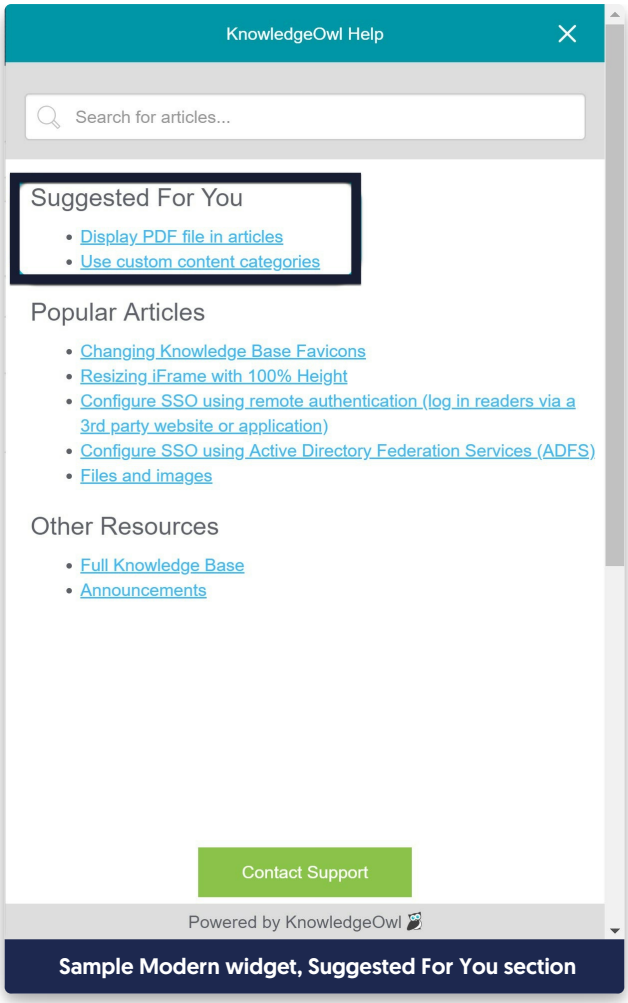
As of August 2022, we have deprecated the **Legacy** and **Modern** widgets. See Deprecation of Modern & Legacy widget for more information.

Recommend On Pages allows you to provide contextual help to your readers through the embeddable contact form widget or the API. You can provide a list of relevant articles based on the page the person opened the widget from, which may eliminate the need for them to search the knowledge base or contact you.

You can relate individual articles to pages in your knowledge base, website, or application so that they are suggested when the widget loads on the page, or you use the API to return articles for a particular page in your site. For example, if you associate articles with the "/pricing" page on your website, these articles appear when the embeddable contact form loads on this page. Alternatively, if you associate articles with the "/account" page in your application and use the API to pull articles for that page, these articles will be returned for your "/account" page.

The exact display is different depending on which widget type you've selected.

If you're using the Modern Slideout widget, this impacts the Suggested Articles header section (in **Settings** > **Widget**, you can designate a different name for this section, so it may be called something else):



Sample Modern widget, Suggested For You section

In order to start using this feature, you'll need to:

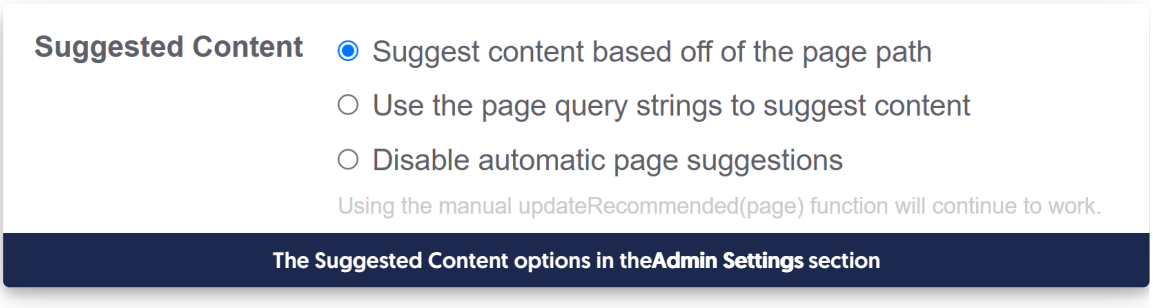
- Set the Widget Settings to use the appropriate **Suggested Content** setting
- Add URLs from your main application or website to the articles or categories you'd like to recommend in the widget or API

Configuration - Widget settings

First, check your widget's settings and be sure that the Suggested Content option best matches how your website or application is set up:

1. Go to **Settings > Widget**.
2. In the **Admin Settings** section, look for **Suggested Content**. This has three options:
    - **Suggest content based off of the page path** (default): use this setting if the website where you're embedding the widget uses the URL or page path to differentiate pages. For example, we use this setting for the widget in this support knowledge base, since our page URLs are formatted without query strings and with no special characters.
    - **Use the page query strings to suggest content**: use this setting if you want to recommend based on query strings, which appear in the URL as ?*variable*=, such as ?s= or ?client= for example. If your website's URLs don't have query strings--or the query strings aren't meaningful for recommendation distinctions--don't use this setting.
    - **Disable automatic page suggestions**: this setting is not available in Modern Slideout and Legacy

widgets



The Suggested Content options in the **Admin Settings** section

3. Select the option that best fits the URLs of the website where you're embedding the widget.
4. Be sure to **Save** your setting change.

Formatting your page paths

Always use relative URLs. If we are configuring articles for https://www.knowledgeowl.com, take the portion of the URL that comes *after* that URL. For example, https://www.knowledgeowl.com/pricing becomes "/pricing". Specifically, the pathname of the URL is sent. The fragment and query string are not sent (unless you've selected the option to use query strings! Then you'd want to use query strings here.)

If your website or application includes URLs that have a variable ID field in them, you can replace that ID with {id} in your URL.

{id} only works with numeric and 24-digit hexadecimal IDs. For IDs that don't match either of those patterns, you would need to use the {custom} option via regex in **Settings > Widget** and configure custom regex rules appropriately.

You may also need to use some custom regex to handle ID values in your URLs; see the **Regex Replace URLs** section in Widget Admin Settings for more details.

Once you have the relative URL for pages you want to specify recommended articles or categories for, you can get started.

If you are using a single page application or the URLs in your website/app don't fit well within this framework, you can call a function to send a path of your choice to the widget. See Using Widget 2.0 on Single Page Applications for more information.

The interface is a little different depending on whether you're adding articles or categories, so let's look at each in turn:

Recommending Articles

To set up an article as being recommended:

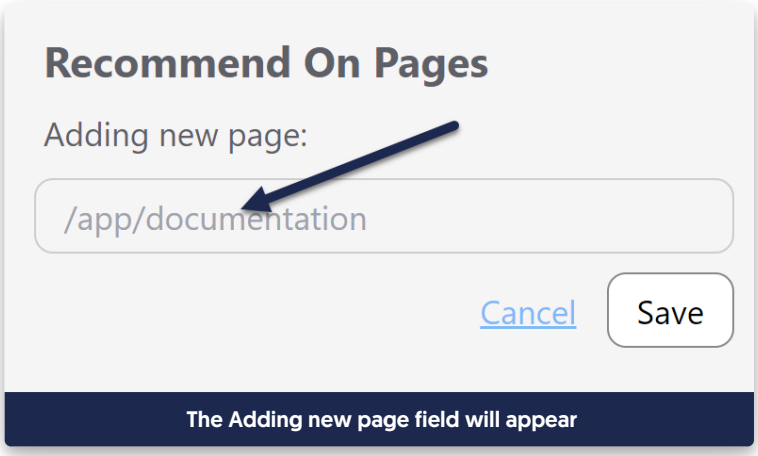
1. Open the article for editing.
2. Find the **Recommend on Pages** section in the righthand column.

3. Select **Add page** to begin adding a new page.



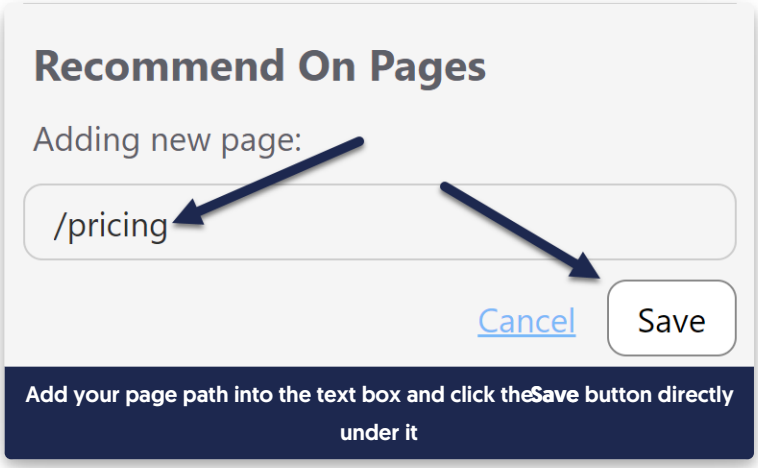
Click the Add page button to begin adding a new page path to recommend this article on

4. This will open an "Adding new page" section. Add your page path into the text field with the /app/documentation placeholder:



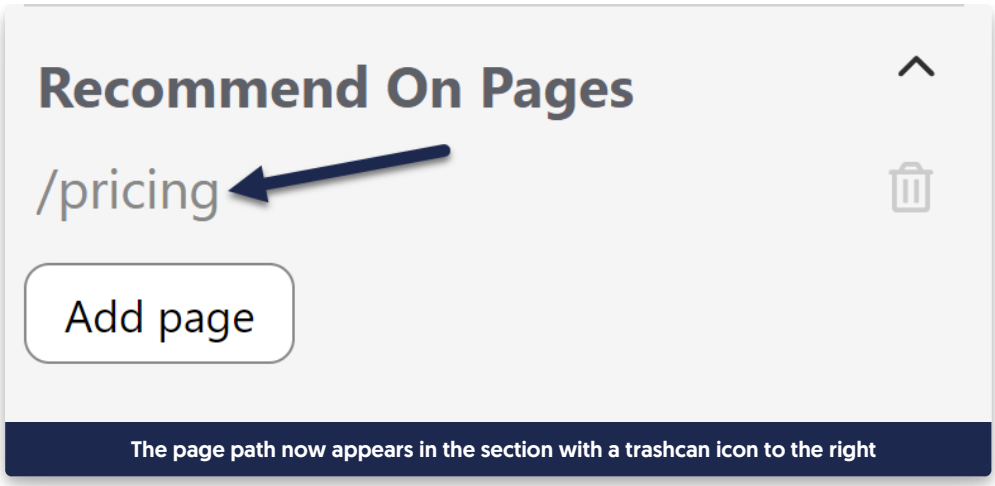
The Adding new page field will appear

5. Once you've finished adding your page path, click the **Save** button directly under it.



Add your page path into the text box and click the**Save** button directly under it

6. The interface will update to show the page path you added:



7. Repeat this process for any other pages you want to recommend this article on.

8. Be sure to **Save** your article once you're done adding paths.

Update an existing recommended article path

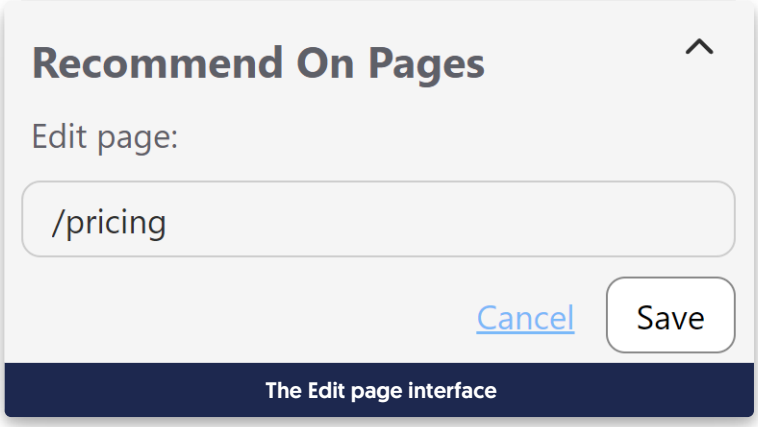
To update an existing **Recommend On Pages** path:

1. Open the article for editing.

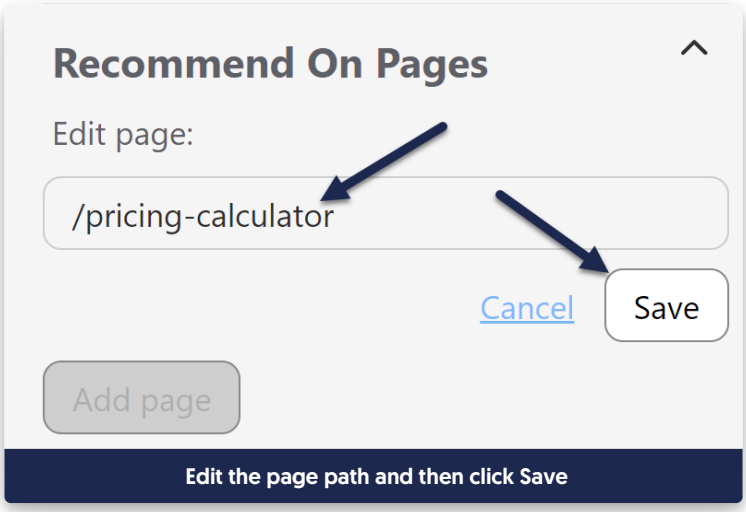
2. In the **Recommend On Pages** section, click on the text of the path you want to edit. Here, we'll edit our /pricing page path:



3. Once you click on the path, the interface adjusts to say "Edit page". You can now edit the path in the text box.



4. Once you've finished making your edits, click the **Save** button directly under the page path:

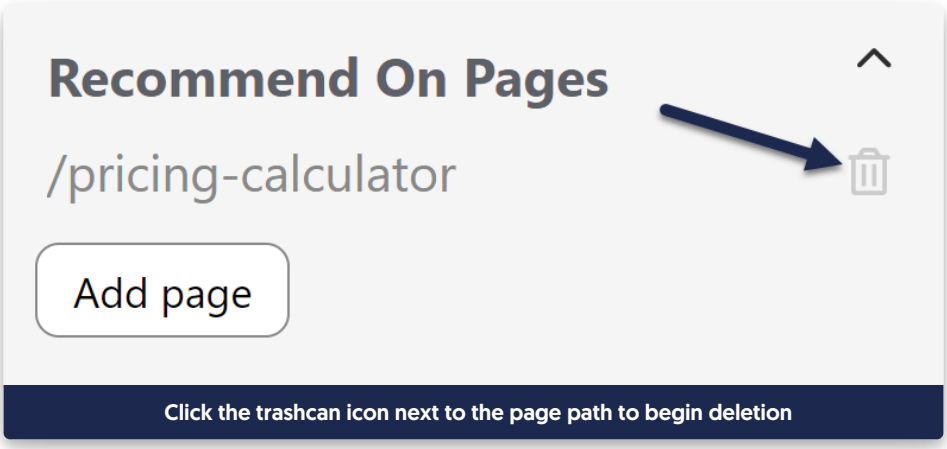


5. Be sure to **Save** your article once you're done making your edits!

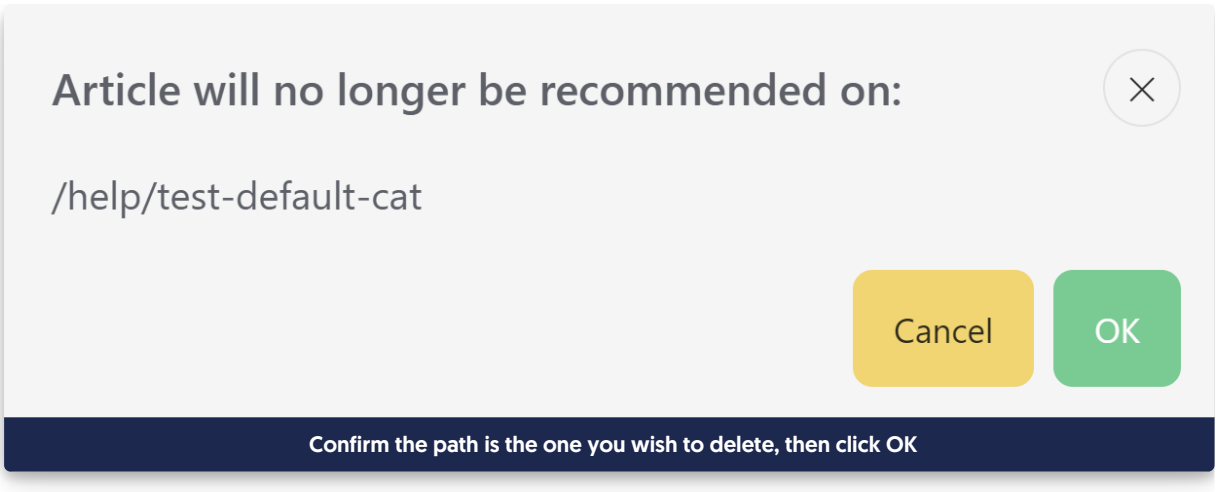
Delete an existing recommended article path

To remove a page path you no longer want to recommend this article on:

1. Open the article for editing.
2. In the **Recommend On Pages** section, click the trashcan icon to the right of the page path you want to remove:



3. In the confirmation message that appears, confirm that the page path is the one you meant to delete.
4. If it's the correct page path, click **OK** to complete the deletion.

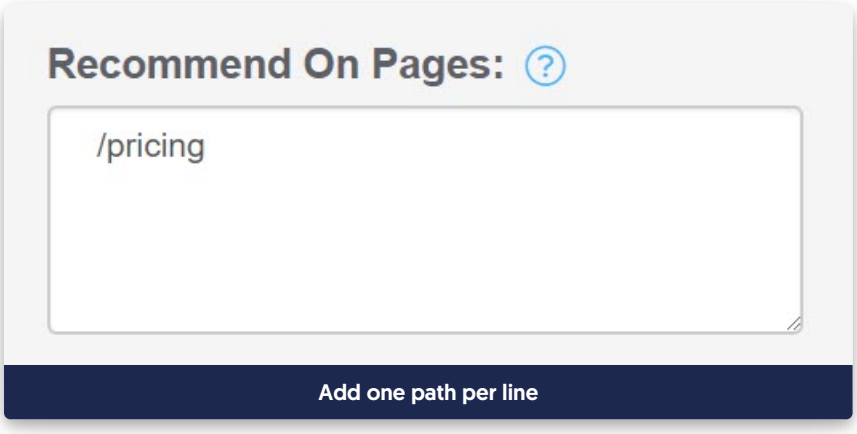


5. The interface updates to remove the path.
6. Once you're done making changes, be sure to **Save** your article!

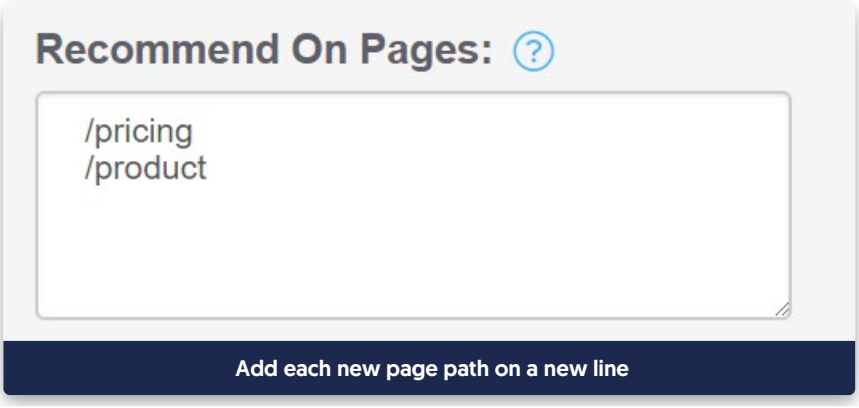
Recommending Categories

To set up a category as being recommended:

1. Open the category for editing.
2. Find the **Recommend on Pages** section in the righthand column.
3. Add the relative URL to the **Recommend On Pages** section, then select **Save**.



4. If you want this article to be recommended on multiple pages in your application or website, add each relative URL on a separate line:



5. Be sure to **Save** the article. The next time someone opens the widget from one of those pages in your site or application, it will suggest this category.

Update an existing recommended category path

To update an existing **Recommend On Pages** path in a category:

1. Open the category for editing.
2. Find the **Recommend on Pages** section in the righthand column.
3. Click in the text box there and edit the page path you want to adjust.
4. Be sure to keep each page path on its own line in the box.
5. Once you're done making edits, be sure to **Save** the article.

Delete an existing recommended category path

To remove a page path you no longer want to recommend this category on:

1. Open the category for editing.
2. Find the **Recommend on Pages** section in the righthand column.
3. Click in the text box there and delete the page path you want to adjust.
4. Be sure the remaining page paths are all on their own lines in the box.
5. Once you're done making edits, be sure to **Save** the category.

Ordering recommended articles

If you've added several recommended articles and you'd like to set the order they display in, you can change the order in by editing the article weights for that page in **Widget > Reporting**. See Recommended Article Weights for more information.

Modern Slideout Widget Authentication with OAuth2

Last Modified on 05/29/2024 5:28 pm EDT

As of August 2022, we have deprecated the **Legacy** and **Modern** widgets. See Deprecation of Modern & Legacy widget for more information.

If your site is restricted behind reader logins or one of the other security options we offer, you can enable the "Secure widget access using OAuth2" option on **Settings > Widget** to give your readers access to your content inside of the widget.

When this option is enabled, the widget will not work unless a valid OAuth2 token is passed through on initiation. To pass the OAuth token through, make sure your widget embed code includes the applicable line from below:

```
//Modern Slideout Widget
_ko16_p.push(['_setToken', 'OAUTH2 TOKEN']);

//Legacy Popover Widgets
_helpgizmo_p.push(['_setToken', 'OAUTH2 TOKEN']);
```

To retrieve an OAuth2 token, you will first need to generate the Client Secret for your knowledge base.

1. Go to **Settings > Widget**.
2. In the **Admin Settings** section, select the "**Generate Client Secret** button underneath **OAuth Authentication.**
3. This will display a Client ID and Client Secret.

Now that you have your client secret and client ID, you can use them to request an access token from the OAuth token endpoint. See below for workflow examples.

Should you ever need to regenerate your client secret, you can do so using the **Regenerate OAuth Secret** button on this page. Note that regenerating a secret will immediately invalidate your existing secret, so your widget authentication will basically be broken until you update it to use the new secret.

Request Token

```
//Basic curl request for token without reader information
curl -u clientID:clientSecret https://app.knowledgeowl.com/oauth2/token -d "grant_type=client_credentials"

//curl request for token with reader information
curl -u clientID:clientSecret https://app.knowledgeowl.com/oauth2/token
-d "grant_type=client_credentials&reader[ssoid]=UID&reader[username]=reader@mysite.com&reader[groups]=Group1
```

Example Response

```
{"access_token":"12345678909876543212345678909876543212345","expires_in":3600,"token_type":"Bearer","scope":r
```

Widget Embed Code with Token

```
var _ko16_p = _ko16_p || [];
_ko16_p.push(['_setProject', '123abc1231231abc123-123abn1231123abnc']);
_ko16_p.push(['_setToken', 'Oauth Token']);
(function() {
 setTimeout(function(){
  var ko = document.createElement('script');
  ko.type = 'text/javascript';
  ko.async = true;
  ko.src = "//yourkbURL/javascript/ko-index?__pc=123abc1231231abc123-123abn1231123abnc"; //kb -- with demo conte
  document.head.appendChild(ko);
 },250);
})();
```

Use the Modern Slideout Widget on Single Page Applications

Last Modified on 05/29/2024 5:28 pm EDT

As of August 2022, we have deprecated the **Legacy** and **Modern** widgets. See Deprecation of Modern & Legacy widget for more information.

The Problem

If you've set up "Recommend on Pages" for contextual help, by default, when a reader navigates to a new page, the widget grabs that URL and uses it to suggest contextual help content. This method works fine for applications that use full page reloads during navigation.

However, for **single page applications** this is not the case. In **single page applications**, the reader might have navigated to an entirely new area of your application, and while the URL may reflect that, the page never fully reloads and thus neither does the widget. This can result in confusion when the reader opens the widget, since the suggested articles may relate to the first page they saw instead of the page they're currently looking at.

The Solution

To solve this problem, you can call the widget `__ko.16.updatePageLoc` method to proactively tell the widget that the current URL has changed:

```
//method to update the current URL used for contextual help
__ko16.updatePageLoc('currentUrl');
```

Example Usage

In the below example, we will attach an event to the HTML element that opens the widget so that when the reader opens the widget we can update the current location with our own custom value:

```
//In this example, the widget settings specify "Attach to Element" which uses the ID of an HTML element to open the wid
//In our example app we've attached the widget to an element with an ID of "ko-widget"
var widgetTriggerElement = $('#ko-widget');

//standard widget embed code
var _ko16_p = _ko16_p || [];
_ko16_p.push(['_setProject', '123123123123123-123123123123']);
 (function() {
   setTimeout(function(){
     var ko = document.createElement('script');
     ko.type = 'text/javascript';
     ko.async = true;
     ko.src = "//example.mysite.com/javascript/ko-index?__pc=123123123123123-123123123123";
     document.head.appendChild(ko);
     /*** NEW CODE ***/
     ko.addEventListener('load', function(){
       pushCurLocation(0);
     });
 },250);
})();

//new function to listen for the trigger that opens the widget to pass the new location
var pushCurLocation = function(attempts) {
 setTimeout(function(){
   if(typeof __ko16 !== 'undefined') {
     widgetTriggerElement.on('click', function(){
/*** UPDATE THIS LINE TO USE WHATEVER METHOD YOU WISH TO SPECIFY THE CURRENT PAGE LOCATION ***/
var currentUrl = 'window.location.pathname';

__ko16.updatePageLoc(currentUrl);
     });
   } else if(attempts <= 4) {
     attempts++;
     pushCurLocation(attempts);
   }
 }, 250);
}
```

Other Reasons for Using This Method

Even if your application is not a single page application, your app's URLs may be constructed in a way that make it very difficult to utilize the "Recommend on Pages" feature.

Another benefit of this function is that it can accept any string value as the "currentUrl" parameter which allows you to use a single word or any other format you wish in place of the actual URL. Take a look at the below examples:

Complex URLs to Simple One Word Location

Let's say that you have an application URL that looks like this:

```
https://myapp.com/app/users/edit-user/abcd123354/id/123151ajsdfa?p=12sdfsd12&q=12154aba
```

By default, the following is what gets sent as the current location to the widget:

```
/app/users/edit-user/abcd123354/id/123151ajsdfa
```

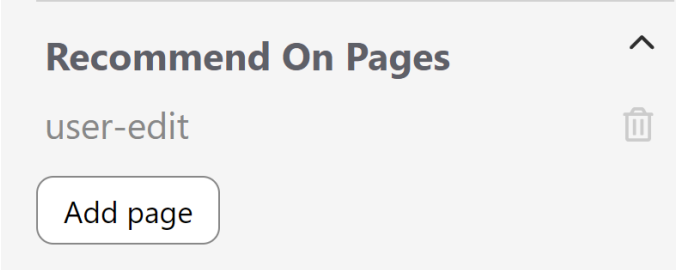
If we leave this as is, we would need to use regex to make sure that the ID portions of the URL get genericized so that we wouldn't need to add a "Recommend On Pages" URL for every single ID possible. So what we'd need to add to articles in the Recommend On Pages section would look some thing like this:

```
/app/users/edit-user/{custom}/id/{custom}
```

While that will work, it is still a fairly complex way to essentially say that we want certain articles to appear when people are looking at the "edit-user" screen. By using the "**updatePageLoc**" method, we can dramatically simplify this like so:

```
//define current page and send to widget
var currentUrl = 'user-edit';
__ko16.updatePageLoc(currentUrl);
```

By using the above method, we can now tell our KnowledgeOwl authors that if they want a certain article to appear as recommended on the "user-edit" pages in the widget, they can add the string "user-edit" to the "Recommend On Pages" text box like so:



Dealing with More Complex Page Paths

You might find that you need to be more specific with which page a reader is looking at. Let's look at the following URLs for example:

```
https://myapp.com/app/users/user/id/123123abasd/reports/data-usage
https://myapp.com/app/account/id/asdfksa1233123/reports/data-usage
```

Both of these URLs are referencing a page that shows a report of "data-usage". However, one of the URLs is referencing the data usage for a single user while the other is referencing the overall data usage for the entire account. If we were to only pass over "data-usage" as the current page, this could cause confusion with the content that gets recommended within the widget.

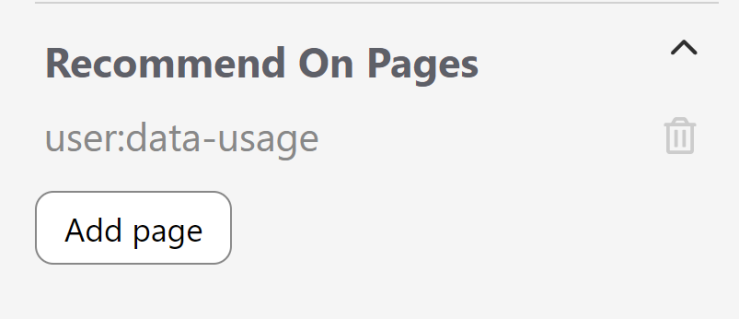
Because the "**updatePageLoc**" function is flexible and accepts any string value, we can handle this in whatever way that will make the most sense to our KO authors. For example, we could send the current page location like so:

```
//Page: https://myapp.com/app/users/user/id/123123abasd/reports/data-usage
var currentUrl = 'user:data-usage';
__ko16.updatePageLoc(currentUrl);

//Page: https://myapp.com/app/account/id/asdfksa1233123/reports/data-usage
var currentUrl = 'account:data-usage';
__ko16.updatePageLoc(currentUrl);
```

We can then tell our KnowledgeOwl authors to make sure they specify the **section** of the app followed by a ":"

followed by the **page** of the app when using the "Recommend On Pages" text area:



This flexibility allows you to come up with a naming convention that will make sense to both the developers that install the widget and the people that are actually writing the documentation.

Example Usage

Extremely simple example HTML page for **https://myapp.com/app/users/user/id/123123abasd/reports/data-usage** where the "**currentUrl**" value is passed to the view via the controller or it is populated in some other way dynamically:

```
<!DOCTYPE html>
<html>
  <head>
    <title>Data Usage Report for John Smith</title>
  </head>
  <body>
    <!-- is passed to view via the controller or otherwise populated dynamically -->
    <input type="hidden" id="currentUrl" value="">
  </body>
</html>
```

The below code uses the value of the HTML element "#currentUrl" that we populated above:

```
//In this example, the widget settings specify "Attach to Element" which uses the ID of an HTML element to open the wid
//In our example app we've attached the widget to an element with an ID of "ko-widget"
var widgetTriggerElement = $('#ko-widget');

//standard widget embed code
var _ko16_p = _ko16_p || [];
_ko16_p.push(['_setProject', '123123123123123-123123123123']);
  (function() {
    setTimeout(function(){
      var ko = document.createElement('script');
      ko.type = 'text/javascript';
      ko.async = true;
      ko.src = "//example.mysite.com/javascript/ko-index?__pc=123123123123123-123123123123";
      document.head.appendChild(ko);
      /*** NEW CODE ***/
      ko.addEventListener('load', function(){
        pushCurLocation(0);
      });
  },250);
})();

//new function to listen for the trigger that opens the widget to pass the new location
var pushCurLocation = function(attempts) {
  setTimeout(function(){
    if(typeof __ko16 !== 'undefined') {
      widgetTriggerElement.on('click', function(){
 /*** REFERENCE TO THE HIDDEN INPUT HTML ELEMENT FROM ABOVE ***/
 var currentUrl = $('#currentUrl').val();

 __ko16.updatePageLoc(currentUrl);
      });
    } else if(attempts <= 4) {
      attempts++;
      pushCurLocation(attempts);
    }
  }, 250);
}
```

Modern Widget + Zendesk Contact Form

Last Modified on 05/29/2024 5:28 pm EDT

As of August 2022, we have deprecated the **Legacy** and **Modern** widgets. See Deprecation of Modern & Legacy widget for more information.

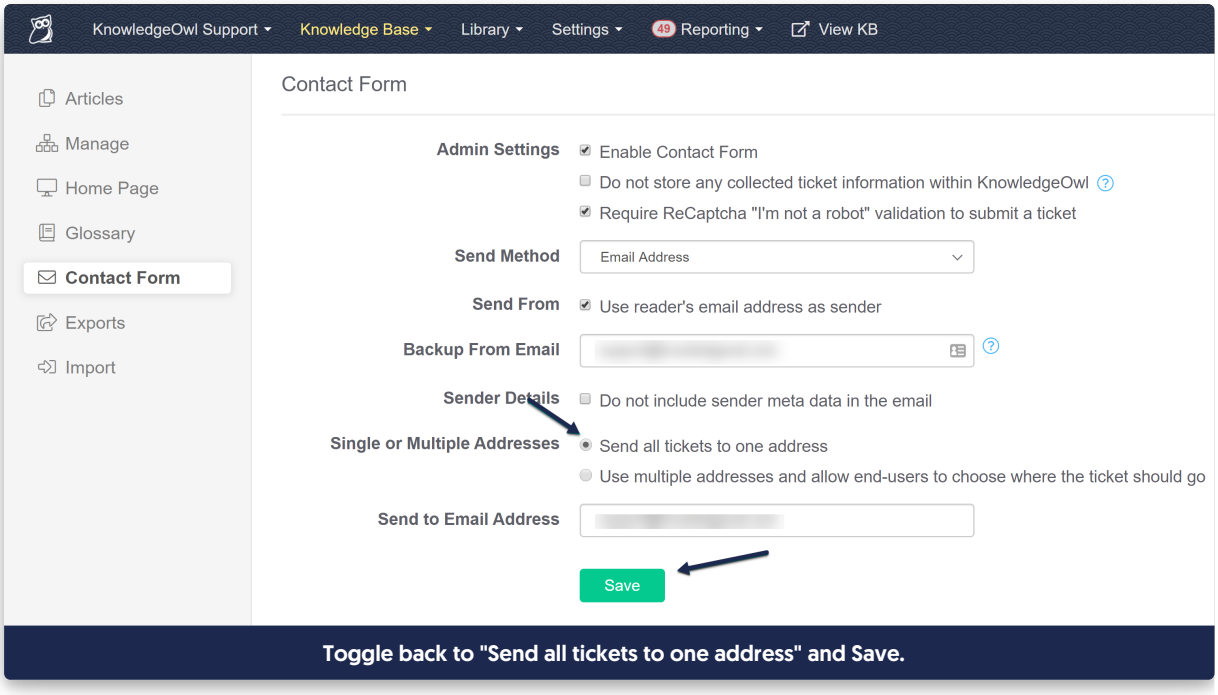
If you set up the Zendesk contact form integration, using the Contact Us button in the Modern Widget will open a ticket in your Zendesk site, just like using the full contact form in the knowledge base.

If you are using the Zendesk contact form integration with Modern Widget, you might see an email address selector. This issue occurs if you:

- Previously had the Contact Form configured to send to an email address AND
- You had set up multiple email addresses to send to

To fix this issue:

1. Go to **Knowledge Base > Contact Form.**
2. Switch the form's **Send Method** back to Email Address.
3. Select the option next to "Send all tickets to one address":



4. **Save.**
5. Now switch your **Send Method** back to Zendesk.

6. Ensure it's properly configured.
7. Re-save.

Deprecation of Modern & Legacy widget

Last Modified on 05/29/2024 5:27 pm EDT

As of August 2022, we have deprecated our Modern & Legacy contextual help widgets.

Why?

Widget 2.0 has been released and stable for quite some time, and it provides much more functionality than the older widgets. We'd like to focus our developers' time on continuing to improve Widget 2.0.

Overview

"Deprecation" can sound a bit scary, so we wanted to explain it a bit more.

In a nutshell, what this means is that we will no longer be updating these widgets. So they won't get any new features and we will only fix the most dire of new bugs.

How will this impact me?

If you are not using Modern Slideout or Legacy widget, the only change you will see is on **Settings > Widget**, where there will no longer be a **Widget Version** selector. The only widget you can set up is Widget 2.0.

If you are using the Modern Slideout or Legacy widget, here's what this means for you:

- We won't add any new features to these widgets and generally won't fix new bugs on them.
- You can keep using the Legacy and Modern widgets as long as you'd like to. We just want you to be aware that we are no longer updating them.
- You will continue to see the Widget version selector in **Settings > Widget** as long as you use one of the older widgets. Once you switch to Widget 2.0, you won't see the option to return to one of the older widget formats.
- If for some reason you need to configure a new knowledge base with an older widget, please contact us .

If all this seems like a good reason to switch to Widget 2.0, we recommend checking out:

- Transition checklist: from Modern Widget to Widget 2.0 to learn how to make the switch
- Modern Widget vs. Widget 2.0 Comparison to see if it might be a good fit for you

What is Linus Assist?

Last Modified on 10/28/2024 5:09 pm EDT

Feature availability
This feature is currently available to new accounts only while we test it and gather feedback. If you're interested in trying it out, contact us .

Defy writer's block. Use Linus Assist to generate content based on your article title for quick, no-frills content creation. This can be a great way to generate dummy or demo content to test formatting, styles, and more!

Linus Assist uses OpenAI to generate article content based on your article's title. Only the article title is sent to OpenAI; no other content or information from your knowledge base is.

Generate up to 20 articles in your account for free without fussing directly with OpenAI.

If you'd like to keep using the service after that, you'll need to sign up for an OpenAI account and enter your own OpenAI API key to continue using it.

Use Linus Assist to help you with article content generation in three ways:

1. When you Create your first article.
2. When you create an article.
3. When you want to generate content for an existing article.

Ready to use the feature? Enable Linus Assist and get started!

Enable Linus Assist

Last Modified on 08/29/2024 12:46 pm EDT

Authors with the **Full Account Admin** permission can enable Linus Assist.

To enable Linus Assist:

1. Select your **profile** in the upper right.
2. Select **Linus Assist**.
3. Check the **Enable** box.
4. Select **Update**.

Linus Assist is now enabled for all knowledge bases in your account.

Use Linus Assist to create your first article

Last Modified on 08/29/2024 12:50 pm EDT

If you're brand-new to KnowledgeOwl, your first option to turn on Linus Assist appears when you **Create your first article**.

1. When the modal opens, enter an **Article name**.
2. To generate the article using AI, check the box to **Enable Linus Assist for AI content generation**. This enables Linus Assist for your account.
3. Once you select **Create article**, we use OpenAI's ChatGPT to generate article content based on your article's title:
4. Select **Add this content to my article** to finish creating the article with this content.

Generate new article from title

Last Modified on 11/12/2024 3:18 pm EST

Stuck with writer's block? Use OpenAI to generate your article from your title! This can be a quick and easy way to generate some test or demo content to play around with new settings, formats, and so on.

Prerequisite
An account administrator must enable Linus Assist before you can use this feature. Right now, Linus Assist is only available to new accounts, but if you'd like to try it in your account, contact us !

How it works

Only the text of your article title is sent to OpenAI. No other information or content from your knowledge base is sent. Generate up to 20 articles across all your knowledge bases this way for free. Refer to What is Linus Assist? for more information.

To use this method for article creation:

1. On the **Articles** page, navigate to the location where you wish to add the article.
2. Select + **Add Article.**
3. Select **Generate article from title.**
4. Select **Add and Edit.**
5. The modal updates to show you the content as OpenAI generates it so you can preview what it looks like. If you're happy with the results, select **Add this content to my article.**



6. The editor opens with the generated content.

Use Linus Assist to generate content for an existing article

Last Modified on 08/29/2024 12:50 pm EDT

Once you've enabled Linus Assist in your account, you can use it to generate new articles.

You can also use it to generate content in an existing article from within the article editor.

No Legacy Editor support
Linus Assist is only available in the Modern Editor.

How it works

When you use this option, we feed whatever the article's current title is into OpenAI to generate content. The new generated content is appended to the end of your current content. If you'd like to only use the regenerated content, delete all content from the editor before you regenerate it.

As with other Linus Assist usage, only the article title is sent to OpenAI. No other content from your knowledge base is shared.

Generate content within the editor

To use Linus Assist for an existing article:

1. Open the article whose content you'd like to generate using AI.
2. Decide how you'd like the generated content to be applied to the article:
    a. To append the newly generated content to your existing article content, go to step 3.
    b. To replace the existing article content with the newly generated content, delete all existing content before you go to step 3.
3. Select the magic wand icon in the editor (a **Linus Assist: Generate article content** tooltip displays when you hover over it).



4. The Linus Assist modal opens and shows you the content OpenAI generates based on the title. The modal also shows you how many remaining free articles you have.
5. Once it finishes (and assuming you're happy with the content), select **Add this content to my article** to add the generated content into your article editor.



If you had existing content and didn't delete it before beginning this process, the generated content appears below your existing content.

Add your own OpenAI API key to Linus Assist

Last Modified on 08/29/2024 12:46 pm EDT

KnowledgeOwl gives you 20 free article generations with Linus Assist.

If you'd like to generate more than these 20 articles, you'll need to:

1. Sign up for an OpenAI account.
2. Create an OpenAI API key. Refer to OpenAI's Quickstart for more information.
3. Copy your OpenAI API key.
4. In KnowledgeOwl, select your **profile/name** in the upper right.
5. Select **Linus Assist**.
6. Enter your **OpenAI API Key** in the text box.
7. Select the **OpenAI Model Choice**.
    a. KnowledgeOwl uses the **gpt-4o** model for our complimentary generations, as this gets you the best results. Be aware that this is more expensive than **gpt-3.5-turbo**, though.
    b. Refer to OpenAI's API pricing page for their current pricing breakdowns.

Why do I need to add my own API key?

We strive to keep our KnowledgeOwl pricing transparent, consistent, and predictable. We also want you to have complete control over whether to enable this feature and how much you want to use it.

By using your own API key, you can better track your usage and guarantee you'll be charged only for what you actually use with no quotas or requirements from us.

Interruption to Linus Assist

Last Modified on 10/28/2024 5:08 pm EDT

Linus Assist may show you a warning message that service has been interrupted and we're working to get the feature back in service:



If you see this message, it means that KnowledgeOwl has paused Linus Assist for maintenance. This is most likely due to one of two reasons:

- OpenAI itself has a service outage or scheduled maintenance, so we've disabled the feature to prevent you getting errors.
- We're doing our own maintenance on the feature, either due to planned maintenance or an outage.

You don't need to take any action. We'll bring Linus Assist back online as soon as we can.

The length of the maintenance depends on the initial cause. We recommend waiting a few minutes and trying again.

You can also contact us if you'd like more detail as to when the feature will be back up.

How search works: the basics

Last Modified on 05/29/2024 5:28 pm EDT

When you publish an article, or you save changes to an already-published article, we reindex that content for search. (We also do this for Custom content categories and Topic display categories!)

We will automatically index words entered in these fields:

- Title
- Permalink
- Body
- PDFs
- Meta description
- Search phrases



So as long as you are placing keywords in your article's title, permalink, body, or meta description, you don't need to do anything extra for that content to show up in search; it just does. 😊

When a reader interacts with your knowledge base, they'll see two main forms of search:

- **Autosuggest search:** As a reader types the phrase, a dropdown will appear below the search bar, showing up to 10 relevant articles.
  - These suggestions are ranked based on the title, permalink, meta description, and search phrases only.
  - We ignore body and PDFs here to keep the autosuggest search very responsive.
- **Full search:** Once a reader hits Enter or clicks the Search icon after typing in a phrase, they'll be taken to the full search results page.
  - These results support pagination and factor all of the indexed fields into a ranking algorithm.

Since autosuggest uses a shorter list of indexed fields, the results you see in autosuggest may differ from what you see in full search.

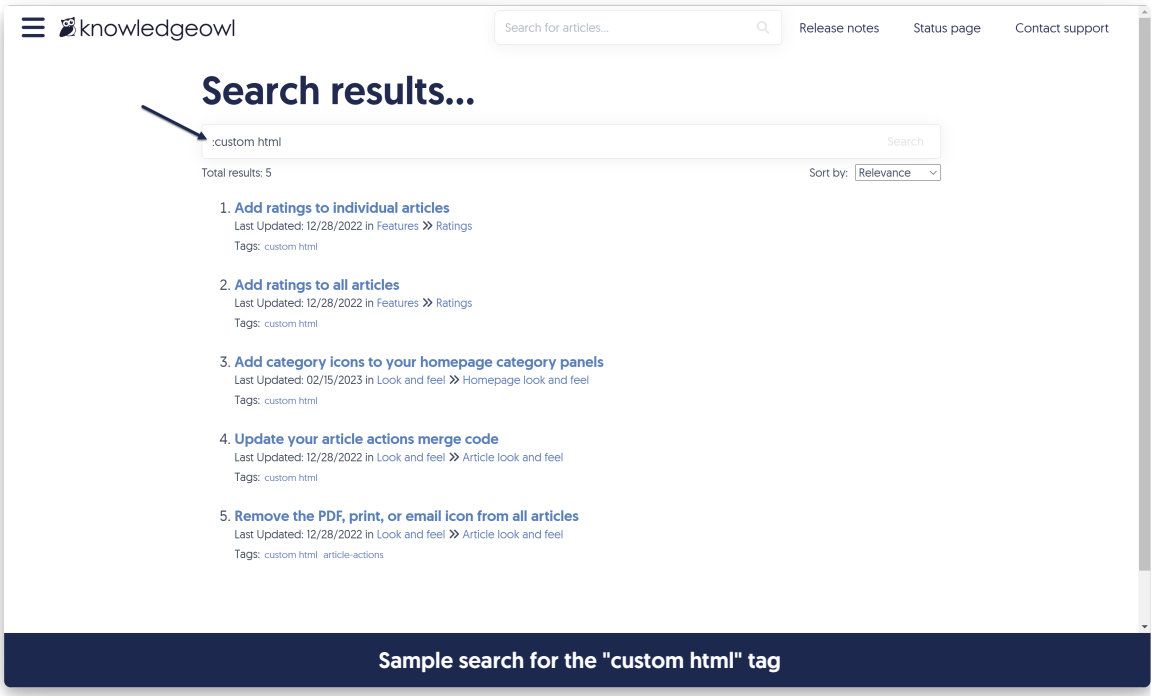
Here is a breakdown of the main differences between autosuggest and full search.

Autosuggest	Full search
Suggests below the search bar as you type	Displays on search results page after hitting enter
Searches title, search phrases, permalink, and meta description (no body or PDFs for speed)	Searches title, body, pdfs, search phrases, permalink, and meta description
Doesn't use synonyms	Uses synonyms
Limited to top 10 suggestions	Displays full results with pagination
Highlights differences in title	Highlights matches in blurb

There's also a third search option:

- **Tags search:** Tags aren't one of the fields that we automatically index as part of main search.

- The tags search is a separate search altogether, and will just pull a list of articles with the searched tag.
- A reader can perform a tags search by beginning their search with a colon--the autosuggest list will suggest tags they can search for.



Sample search for the "custom html" tag

Pagination

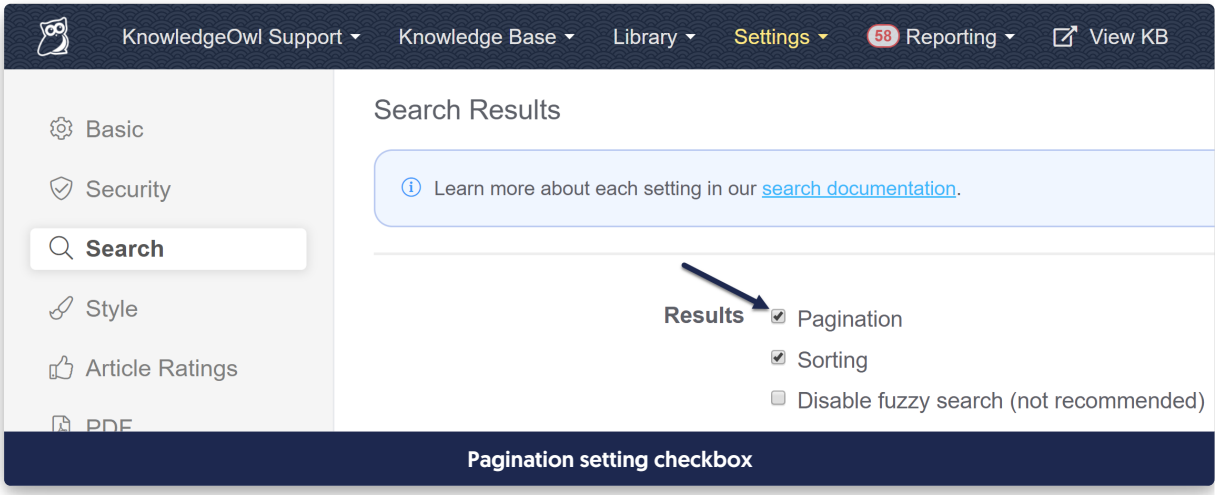
Last Modified on 05/29/2024 5:28 pm EDT

Pagination allows your readers to view all possible search results. By default, we return the top 20 articles ranked by relevance.

If you enable pagination, we will display the total search results beneath the search bar and allow the reader to paginate through all the results. They can use the next and back arrows to move between pages, jump to a particular page, or jump to the first and last page.

To enable pagination:

1. Go to **Settings > Search.**
2. In the **Results** section, check the box next to **Pagination.**



Pagination setting checkbox

3. **Save.**

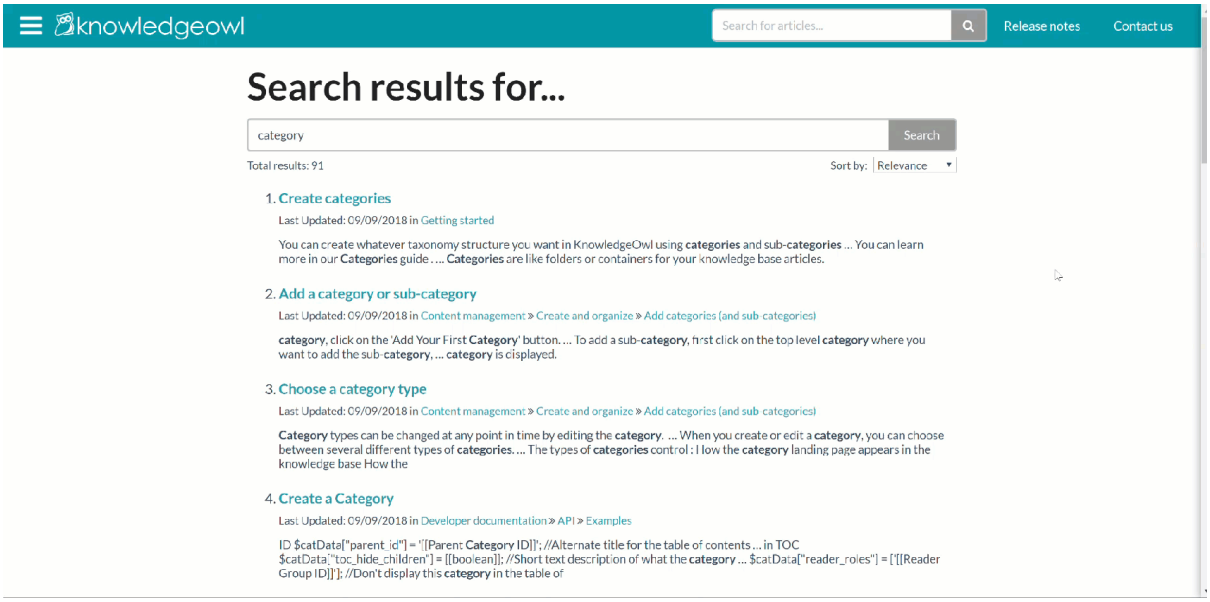
Sorting

Last Modified on 05/29/2024 5:28 pm EDT

Search results are sorted by relevance by default. The goal is to show the most relevant articles at the top of the results. However, sometimes a reader might want to find the most popular, newest, or most recently updated article in the results.

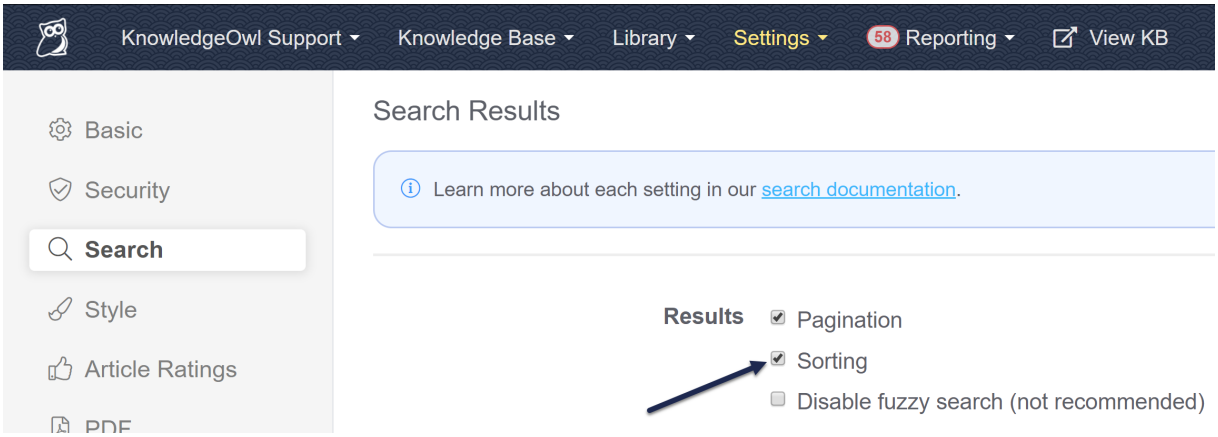
If you enable sorting, we display a sorting dropdown menu below the search bar. Readers will be able to sort the results in the following ways:

- Relevance (default, based on search relevance algorithm only)
- Popularity (total views)
- Last updated (date modified)
- Newest (date created)



To enable sorting:

1. Go to Settings > Search.
2. In the **Results** section, check the box next to **Sorting**.


KnowledgeOwl Support
Knowledge Base
Library
Settings
58 Reporting
View KB
Basic
Security
Search
Style
Article Ratings
PDF
Search Results
Learn more about each setting in our search documentation.
Results
Pagination
Sorting
Disable fuzzy search (not recommended)

3. **Save.**

Glossary snippets

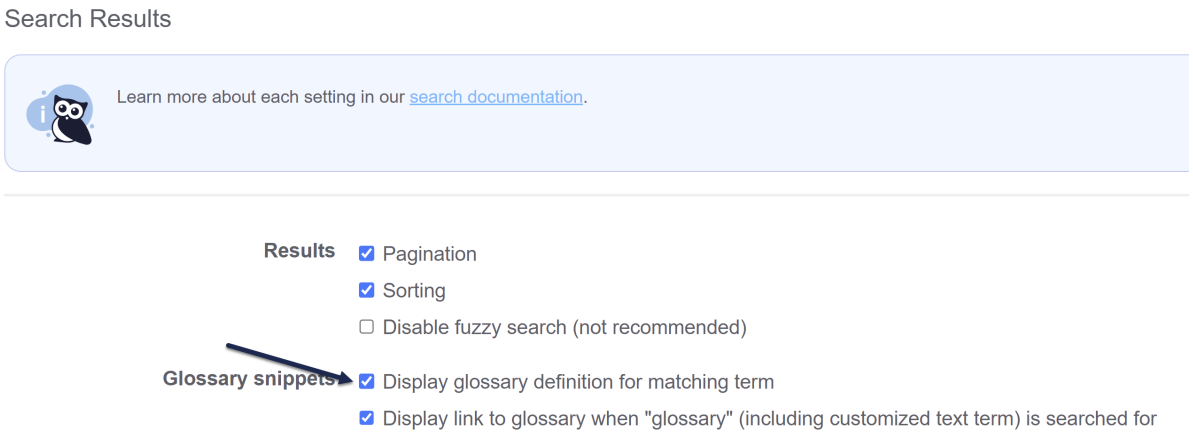
Last Modified on 05/29/2024 5:28 pm EDT

If you're using Glossary, you can choose to display glossary terms that match the search phrase at the top of search results. Here's how it works:

- If your reader searches a phrase that exactly matches a glossary term, the term and its definition will be displayed in a box at the top of the search results.
- The glossary search result also includes a link to the specific letter in the Glossary that this term falls under.
- You can add custom CSS to style this box however you'd like.

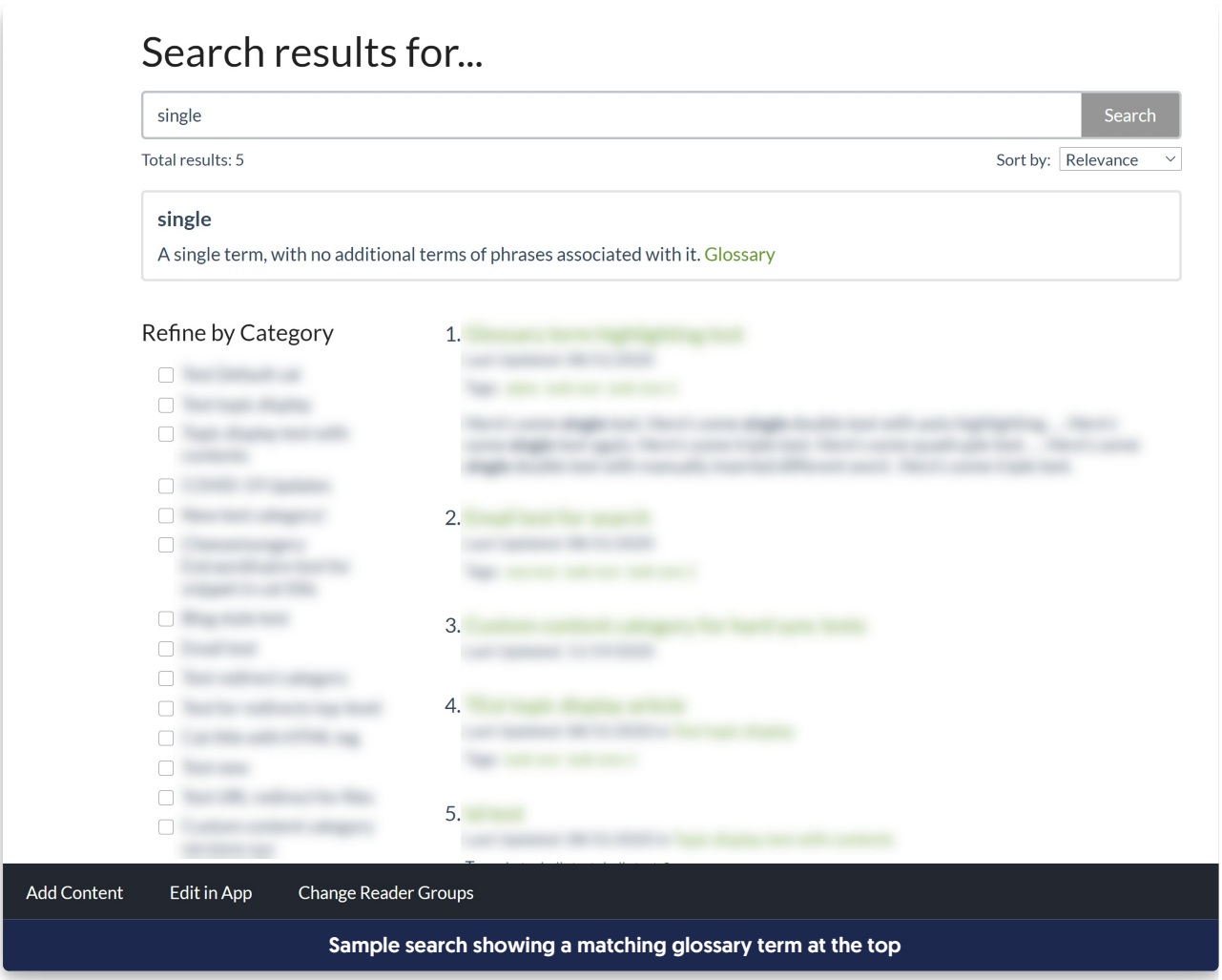
To enable the setting:

1. Go to **Settings > Search**. (Or, from the **Glossary** page, click the **Edit in settings** link next to "Definitions at the top of the search results.")
2. In the **Glossary snippets** section, check the box next to "Display glossary definition for matching term."

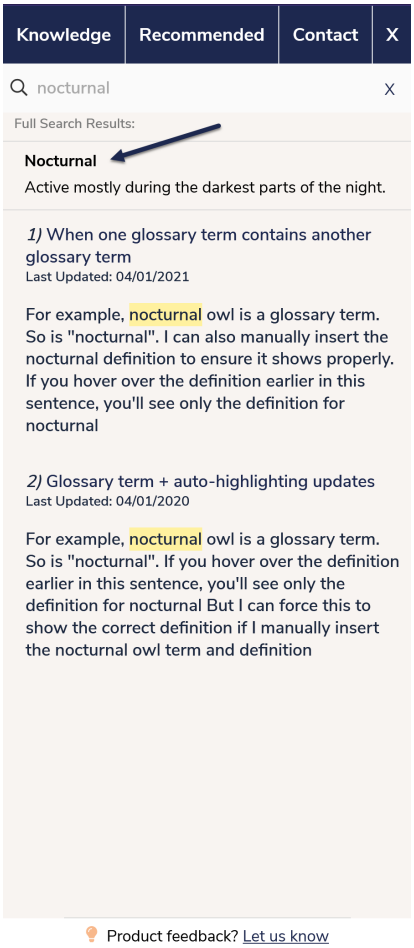


3. **Save** your changes.

You can now run a search for a glossary term and see it appear at the top of search results:



If you're using Contextual Help Widget (2.0), these search results will also be displayed in widget searches:



With glossary snippets enabled, see Style the glossary snippet search results to give these results the look and feel you want! Don't like the word "Glossary"? Use the Search section of the Customize Text tool to change the text that appears there!

Add the glossary page to your search results

Last Modified on 05/29/2024 5:27 pm EDT

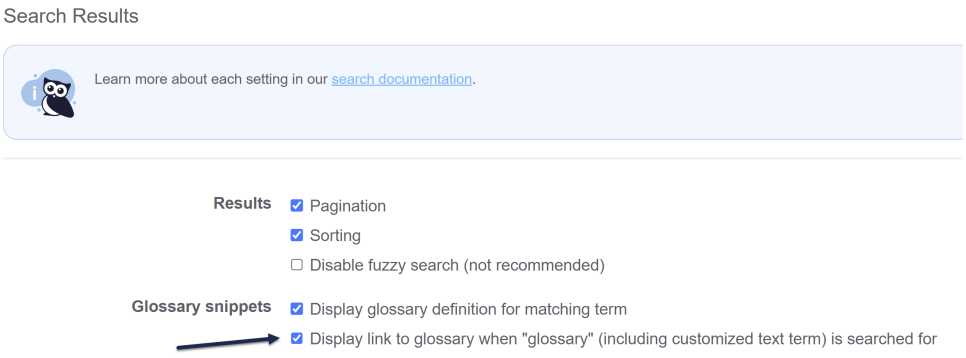
By default, your glossary page doesn't show up in search results. This means that if a reader types "glossary" in search, they won't get any results, or at least won't get the glossary page as a result.

But you can set it so that someone searching for "glossary" will get the glossary page as a result.

> Unlike the Glossary snippets functionality, this result will NOT display in Widget 2.0 search results.

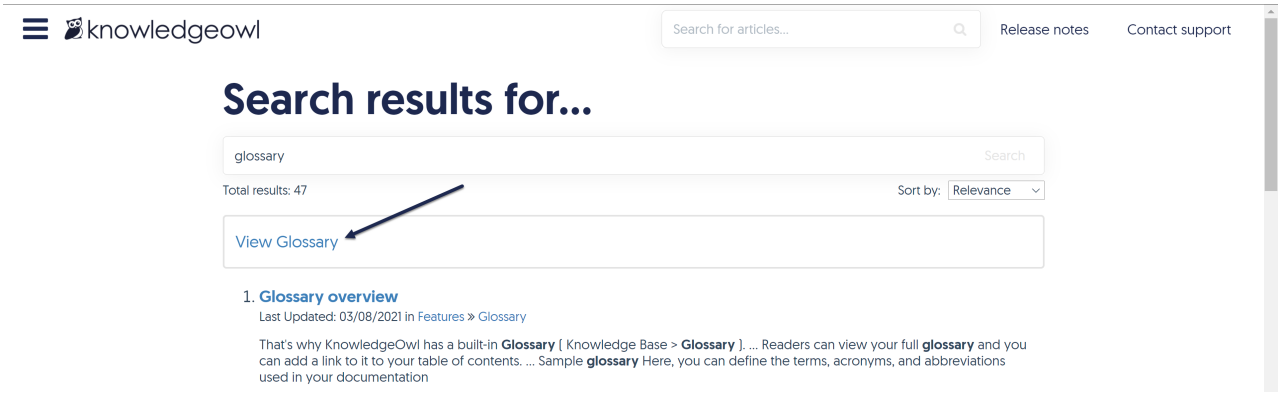
To enable this option:

1. Go to **Settings > Search**. (Or, from the **Glossary** page, click the **Edit in settings** link next to "Definitions at the top of the search results.")
2. In the **Glossary snippets** section, check the box next to **Display link to glossary when "glossary" is searched for**.



3. **Save** your settings.

Now, when a reader searches for "glossary", they'll see an option to **View Glossary** at the top of the search results:



You can change the look and feel of that section using the Style the glossary snippet search results options, too!

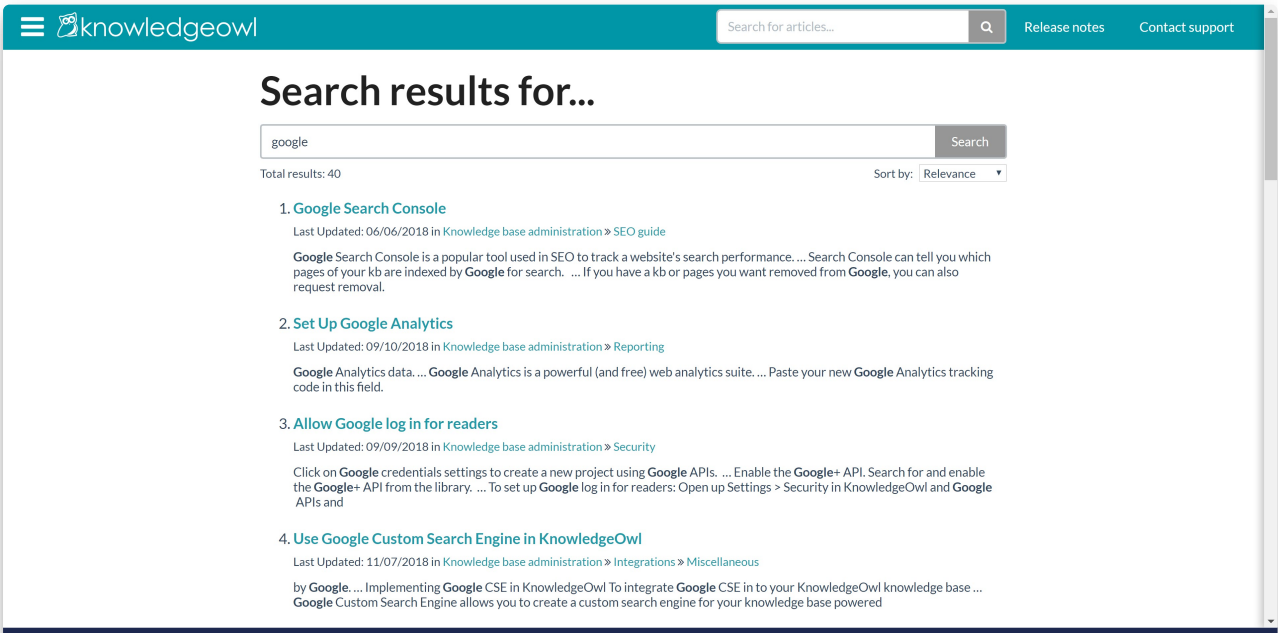
Don't like the wording for "View Glossary"? Never fear--use the Search section of the Customize Text tool to change it. ☺

Have you used the Customize Text tool to change the word "Glossary" to something else on the Glossary page itself? Never fear! This setting will apply to both the word "glossary" and whatever custom text string you've used!

Article blurbs

Last Modified on 05/29/2024 5:27 pm EDT

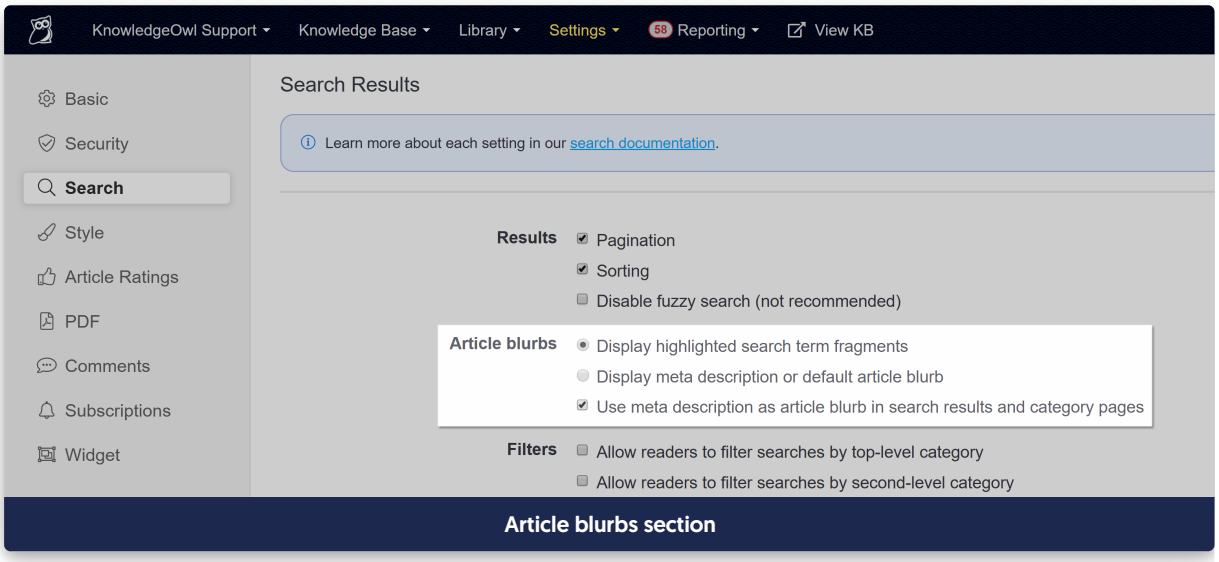
Article blurbs are the summary information displayed under search results. By default, we display highlighted search term fragments, but you can override this to display the meta description or default article blurb instead.



Highlighted search term fragments

To change your search result article blurbs:

1. Go to **Settings > Search.**
2. Make a selection in the **Article Blurbs** section:



Article blurbs section

3. **Save.**

What does each setting do?

- **Display highlighted search term fragments (default):** This will display dynamic fragments of text from the article with the search term highlighted.
- **Display meta description or default article blurb:** This will display the meta description for the article, if one exists; otherwise it will display the first 150-ish characters from the article, including any code or HTML.
- **Use meta description as article blurb in search results and category pages (recommended):** When checked, this will force the search results to display the meta description (even if it's empty). It will also display the article's meta description on any category landing pages, instead of using the first 150-ish characters of the article body. We strongly recommend keeping this box checked regardless of the display option you've selected above it.

Highlighted search terms vs. Meta description

We default article blurbs to display highlighted search term fragments for a few reasons:

- It's consistent with how Google and other search engines display results
- It provides context for the search result, and that can help readers get to the information they want faster
- Showing search terms in context can help readers figure out other search terms that might help them find what they need better

For many customers, this is just generally an intuitive search setting.

However, there are some cases where this doesn't make sense. If your articles frequently use the same word repeatedly in the same sentence, the fragment blurbs can almost seem noisy or cluttered. You might also want to use meta descriptions when you have a lot of similarly-structured articles and you want to set a clear, succinct meta description to consistently appear in search results.

There is no hard and fast rule about which setting is more ideal: it really depends on how your knowledge base is set up and how readers use it. When readers might be most heavily searching product codes or serial numbers and these fields appear in tables or long lists in articles, meta description might be a much better setting. But where readers are coming in to search for topics or subjects, often the search term fragments are a much better setting.

The good news is that changing this setting instantly takes effect and requires no reindexing for search, so you can very easily toggle it one way and then go back to the other if it isn't working for you.

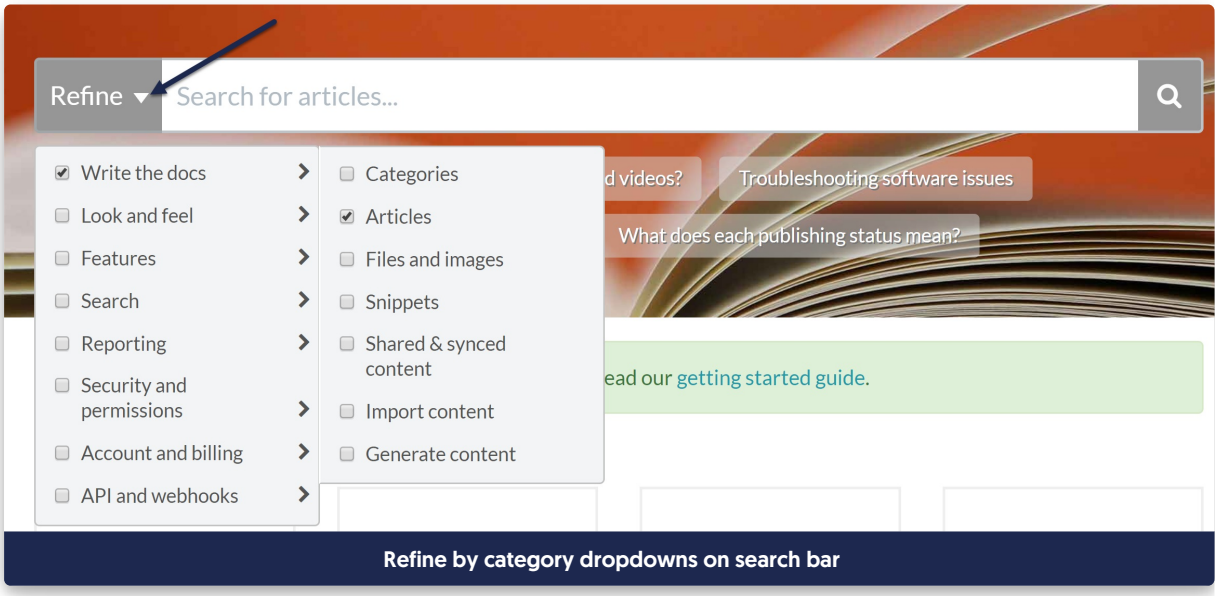
Filter search by categories

Last Modified on 05/29/2024 5:28 pm EDT

You can allow your readers to filter search results by category. You can choose to allow filtering by the top-level categories or by both top-level and second-level categories.

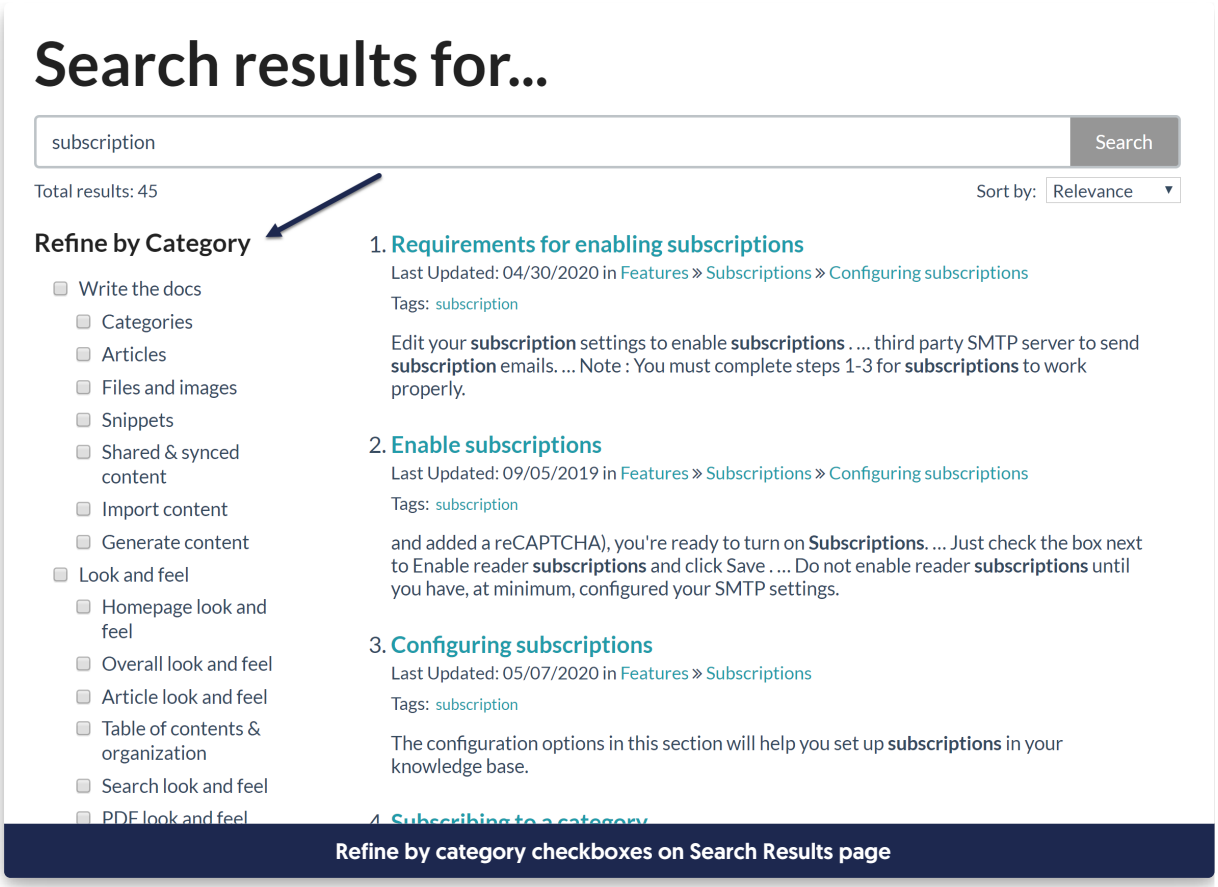
When enabled, this option will:

1. Add a Refine dropdown menu to your search bars. This allows your readers to select a category before they search.



Refine by category dropdowns on search bar

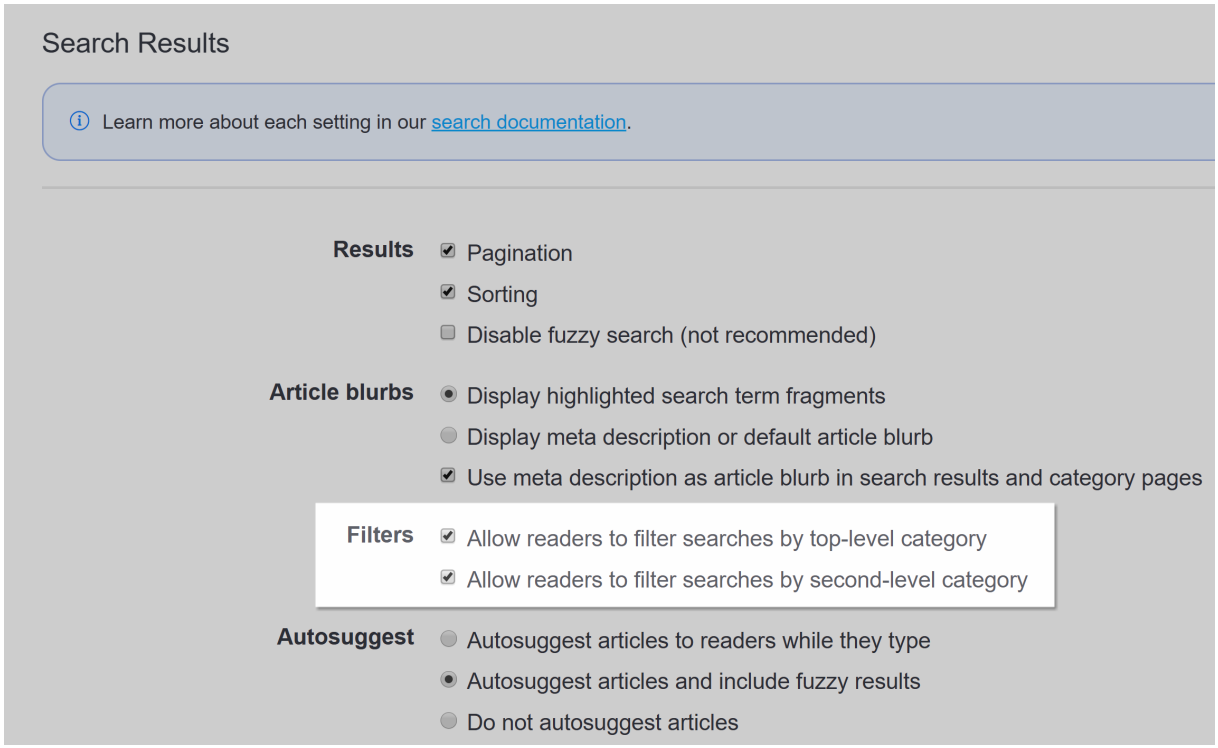
2. Add Refine by Category checkboxes to your search results page. These allow your readers to refine by category from the search results page after they search.



Refine by category checkboxes on Search Results page

To add these refine by category options for top-level and/or second-level categories:

1. **Go to Settings > Search.**
2. **In the Filters section, check the boxes next to top-level or top-level + second-level categories to add the refine options for those two levels, respectively.**



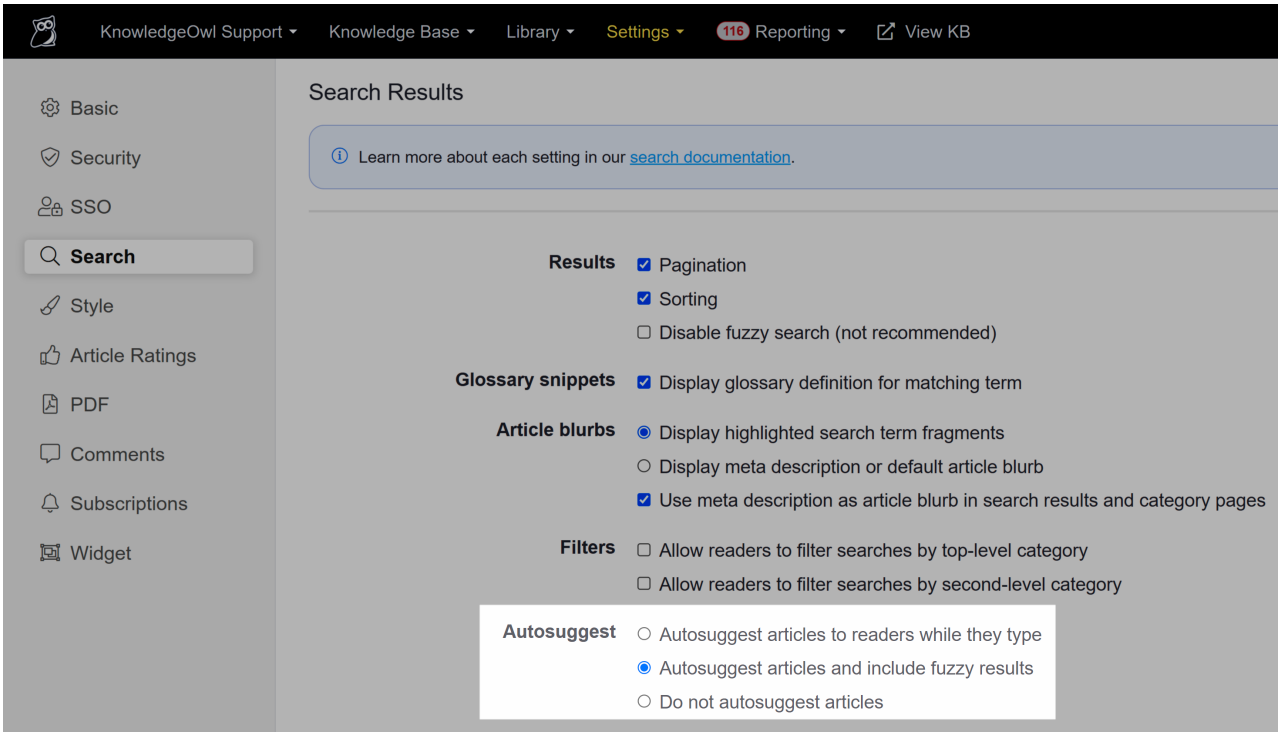
3. **Save.**

Autosuggest

Last Modified on 05/29/2024 5:27 pm EDT

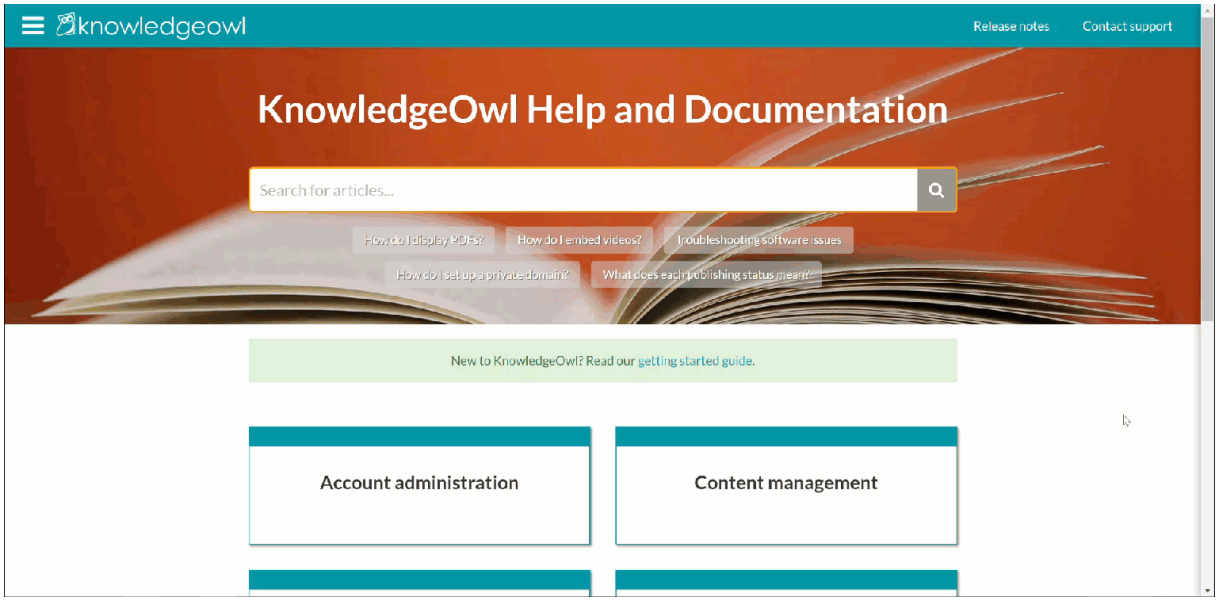
Autosuggest controls what kind of search is performed as readers begin typing in the search box, before they hit enter or click the search icon to run a full search. By default, we set autosuggest to return to readers while they type. When either type of autosuggest is enabled, readers will see up to 10 relevant results in a dropdown below the search bar.

To change autosuggest settings, go to Settings > Search.

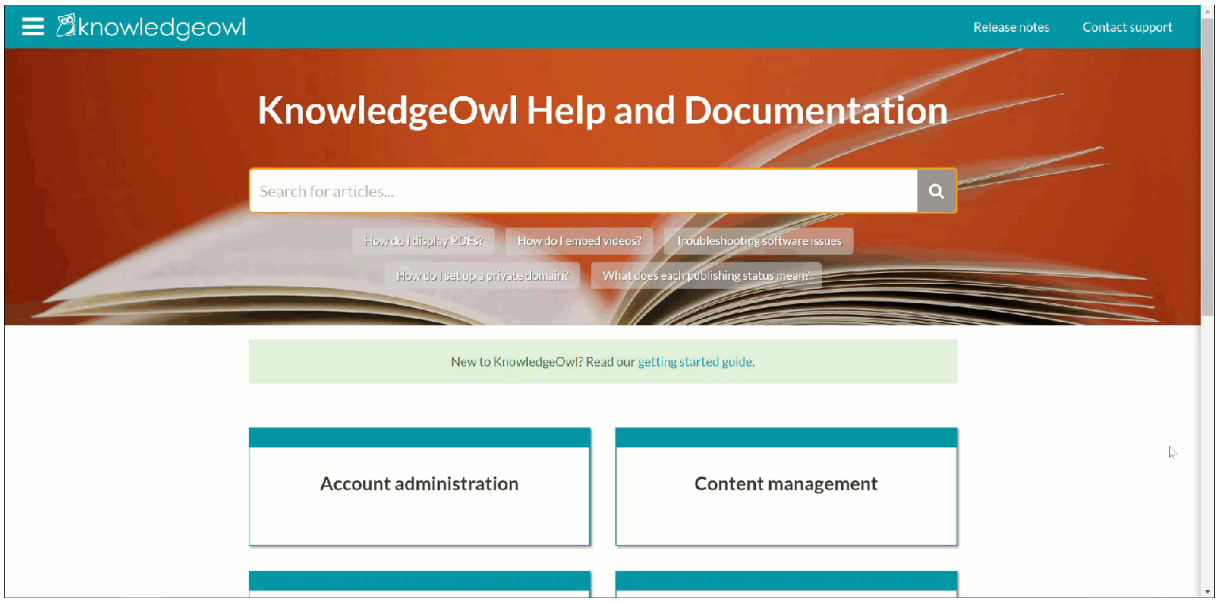


There are three autosuggestion settings:

- **Autosuggest articles to readers while they type: This setting will autosuggest articles as readers type. It is not typo-tolerant. If multiple words separated by spaces are used, it will match and return results on the words independently. For example, if I type "configuring", I will see autosuggestions that contain "configuring". If I type "configuring search", I will get autosuggestions containing either "configuring" or "search":**



- **Autosuggest articles and include fuzzy results:** This setting will autosuggest articles as readers type, and it will also do "fuzzy" matching. Think of this like typo tolerance: searching for "remainder" might bring up articles with "reminder", searching for "good" may bring up articles with "Google". With fuzzy results turned on, the more precise match should bubble to the top of the autosuggestions:





We recommend this setting with one caveat: for some customers with key search terms that are very close in spelling, it can increase the number of search results you get. So just be sure you test it to be sure it's helpful rather than noisy.

- **Do not autosuggest articles:** Use this setting if you do not want any autosuggestions to appear as readers type. Readers will need to hit Enter or click the search icon to complete a full search and see any results.

For more details on what happens under the covers in autosuggest, see Autosuggest search.

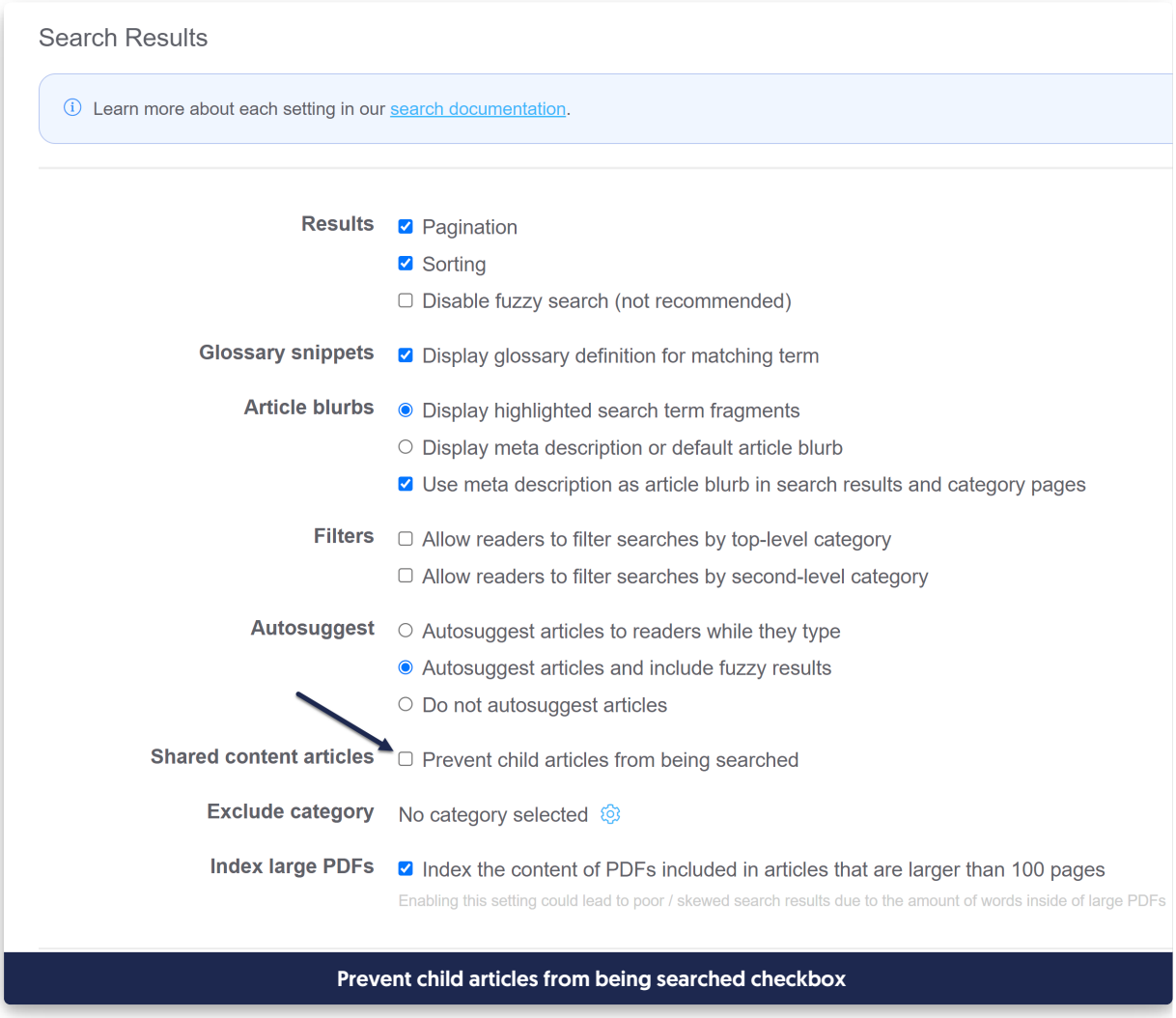
Shared content articles

Last Modified on 05/29/2024 5:28 pm EDT

When you create an article using the option to Share content from an existing article, it is considered a "child" article (the original is considered the "parent".) By default, child articles are excluded from search.

To enable child articles to show up in search:

1. Go to **Settings > Search.**
2. Next to **Shared content articles**, uncheck the box next to **Prevent child articles from being searched.**



Prevent child articles from being searched checkbox

3. **Save.**

Exclude category

Last Modified on 05/29/2024 5:28 pm EDT

Have you ever wished you could exclude an entire category's contents from search, all at once? Maybe you have a category where you include content specific to particular customers, where you provide them a URL and otherwise hide that category from search and navigation. Or, you might have a category you use for Internal Reviews, where you publish things that are in-progress to get feedback from subject matter experts, but you don't ever want your general readership to find those resources.

Search result exclusions are usually set in individual articles. They don't get passed from the category to the articles.

So, for example, if I have a category called Enterprise Resources, and it contains subcategories for each of my enterprise customers, I'd have to manually set each individual article to be excluded from search:

- Enterprise Resources
  - Customer 1
    - Article 1 (exclude from search)
    - Article 2 (exclude from search)
  - Customer 2
    - Article 3 (exclude from search)
    - Article 4 (exclude from search)

Excluding content from search this way can be inconsistent, since it depends on your content creators to remember to check the box in each article or for you to create a reader group restriction.

In the Search Settings, you can fully exclude a single category *and all of its content* from search results. When you use this option, it automatically excludes from search:

- All articles directly within the category
- The main category (if it's topic display or custom content, which are indexed for search)
- All topic display or custom content subcategories
- All articles in the category's subcategories

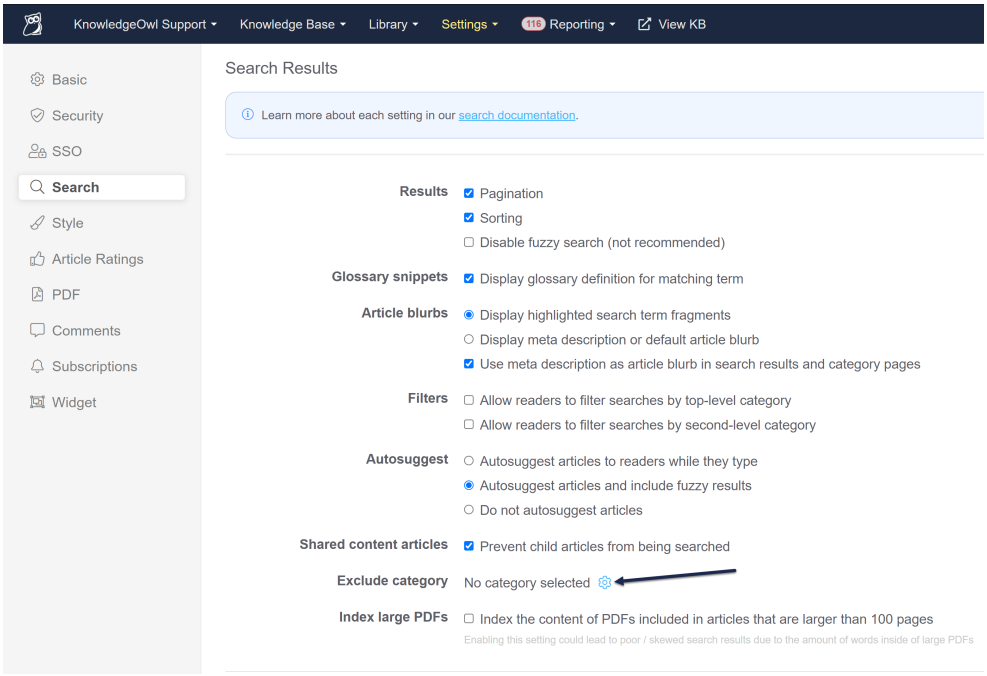
So, in the above example, if I set my Customer 1 category to be hidden from search, Article 1 and Article 2 would be automatically hidden, even if I didn't check that option in the articles themselves.

If I set Enterprise Resources category to be hidden from search, all four articles would be hidden from search, as would any future articles created for additional customers.

Exclude a full category from search

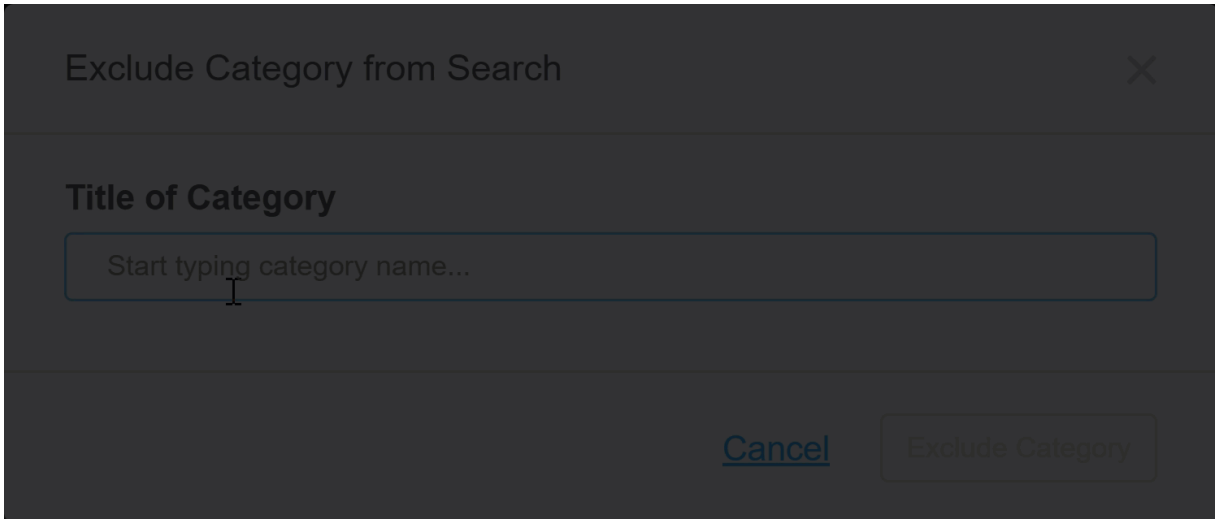
To exclude a category and all its content from search:

1. Go to **Settings > Search**.
2. Next to **Excluded category**, select the gear icon:



3. **In the pop-up that appears, start typing the name of the category you want to exclude. You'll get an autosuggested list as you type. Click the category you want to select.**

4. **Then select Exclude Category.**



5. **Once you've made your selection, click Save to save your changes.**

All of the content in that category is now excluded from search.

Index large PDFs

Last Modified on 05/29/2024 5:28 pm EDT

The search index will automatically scrape and index the contents of PDFs in articles. By default, we only index the content of PDFs under 100 pages long.

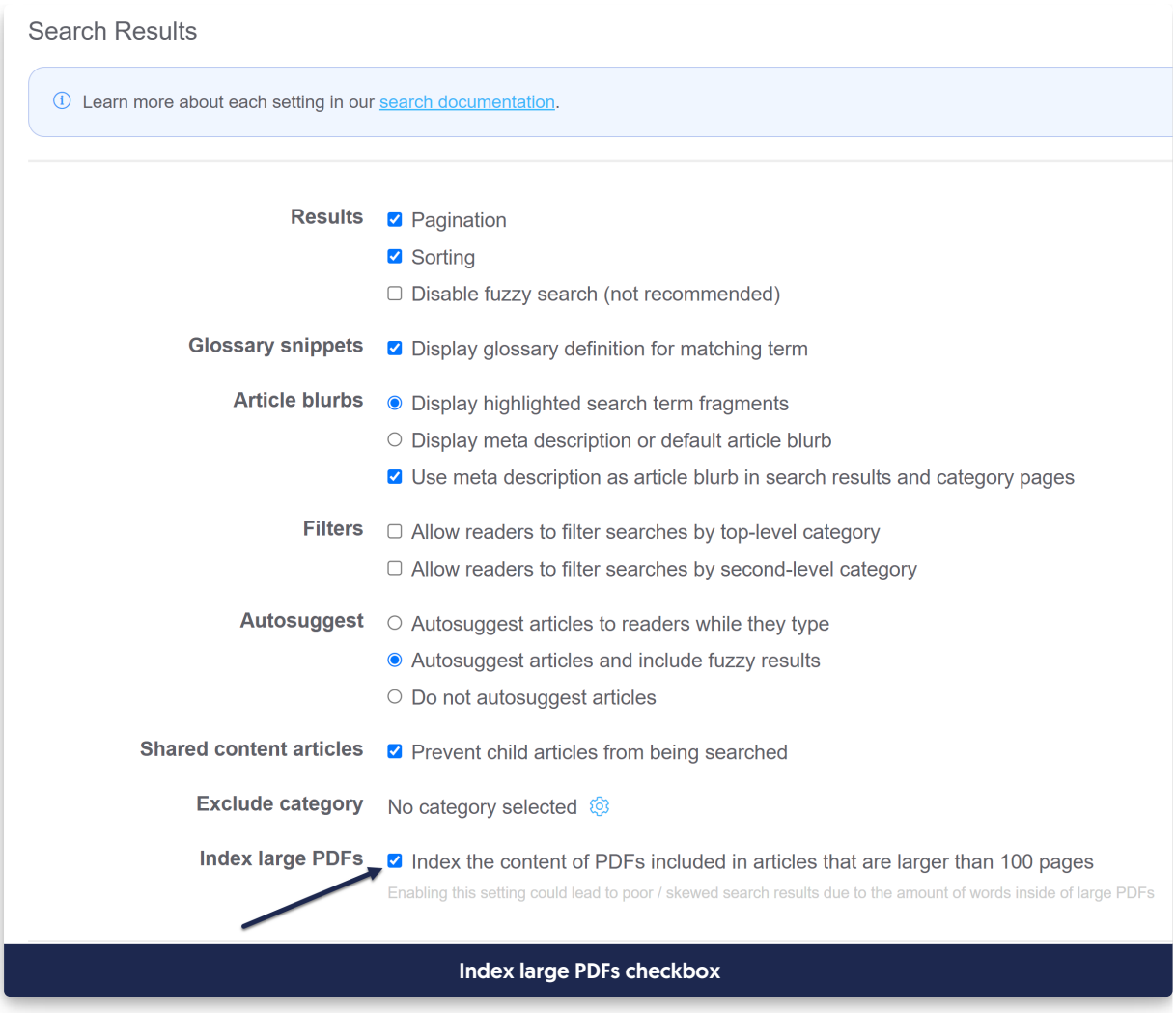
If you have PDFs longer than 100 pages and you'd like them to be indexed for search, you'll need to change this setting.



Enabling this setting could lead to poor / skewed search results due to the amount of words inside of large PDFs. We recommend only using it if absolutely necessary, and testing some of your common search terms' results before and after the change.

To enable indexing of PDFs longer than 100 pages:

1. Go to **Settings > Search**.
2. In the **Index large PDFs** section, check the box next to **Index the content of PDFs included in articles that are larger than 100 pages**.



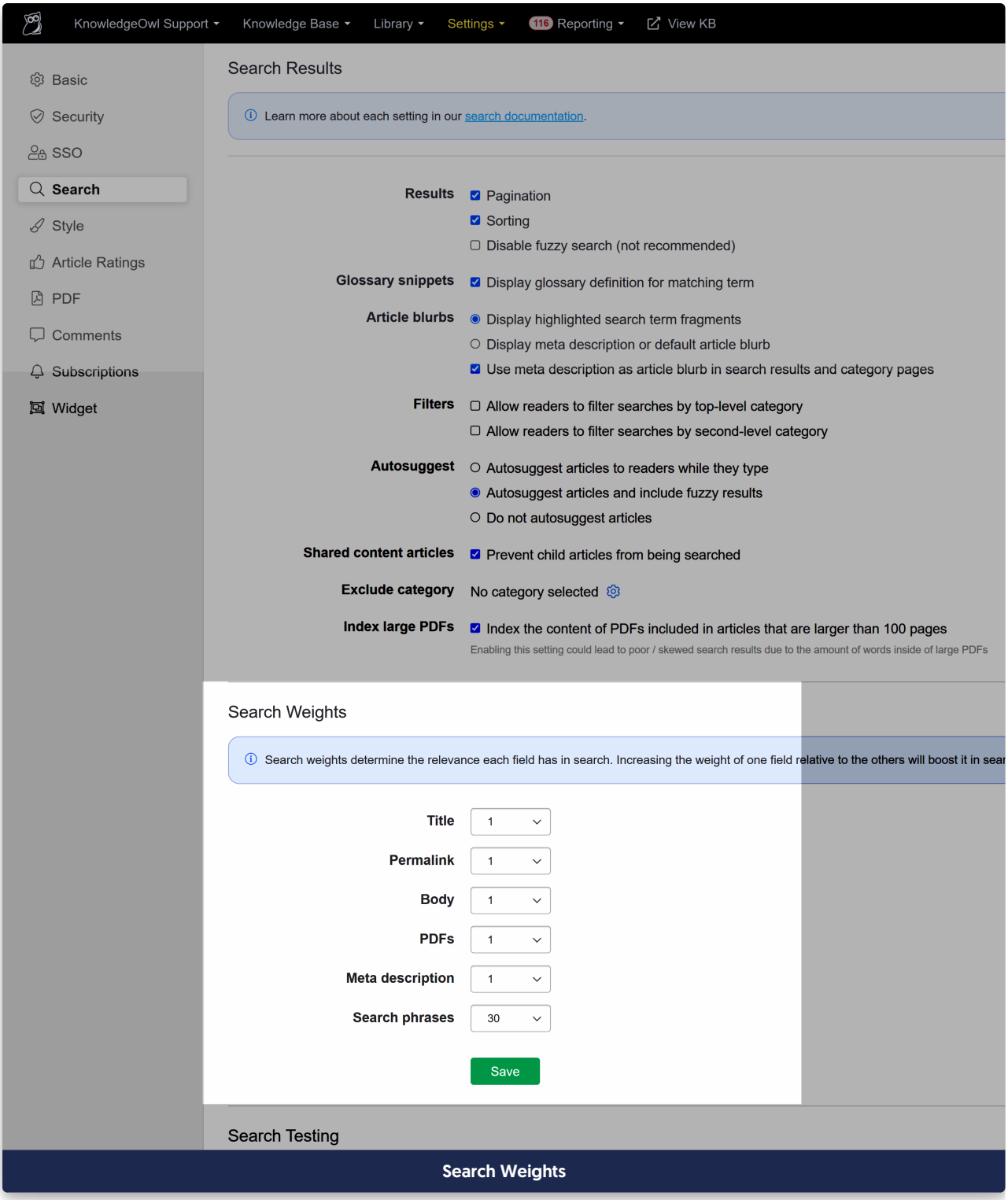
Index large PDFs checkbox

3. **Save.**

Search weights

Last Modified on 05/29/2024 5:28 pm EDT

Search weights determine the relevance each article field has in search. All fields start with a weight of 1 and have equal relevance in search. You can view your knowledge base's current relevance search weights by going to **Settings** > **Search** and looking in the **Search Weights** section.



The following fields are indexed for search:

- **Title**
- **Permalink**
- **Body**
- **PDFs**
- **Meta description**
- **Search phrases**

Tags do not impact search weights or relevancy scores.

Search weights allow you to boost individual search fields. The weight represents how strong of a preference you'd like to give it.

For example, say that you set article titles to a weight of 10 and keep the other fields at 1. The search engine will still try and determine the best match across all fields using relevancy scoring algorithms. If the search finds a similar match in the title of one article and the body of another, the search weight will be used to bump up the score of the article with the matching title and it will rank higher.

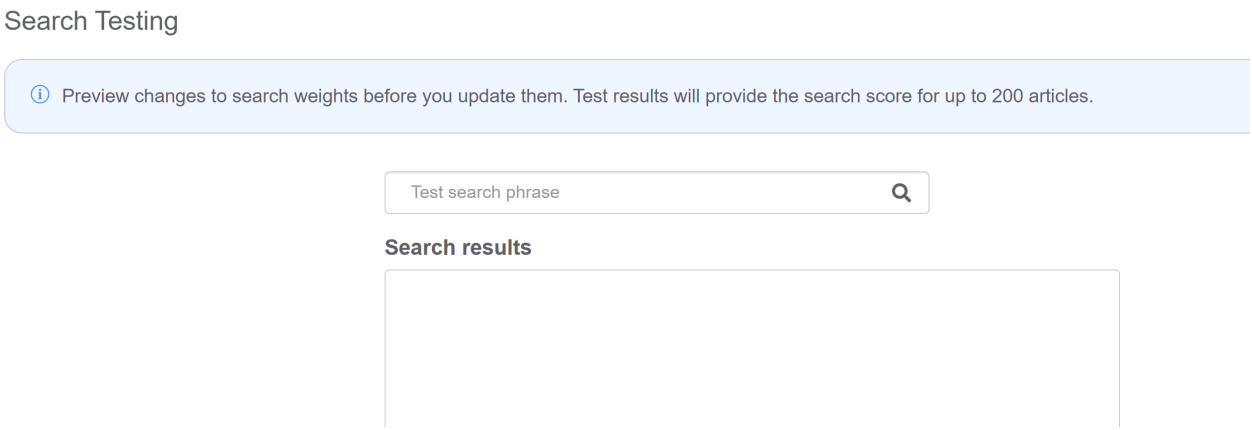
See Dig into your weights for more information.

Search testing

Last Modified on 05/29/2024 5:28 pm EDT

Search testing

Once you've made changes to your search weights, use **Search Testing** to quickly and easily test changes to search weights to see if they're producing the results you want/expect. The Search Testing section is just below the Search Weights section on **Settings > Search**.



Type a search term into the test search phrase field and hit enter (or click the magnifying glass). This will give you the search results and relevance score for up to 200 articles.

To see how a change to search weights will affect your results, adjust the weights and click the magnifying glass to refresh the search results. You can see how changes will affect the ranking and scoring of results.

You can also click on an article to open the editor to view and make adjustments to the searchable fields. Once you've made changes, search again to see how it affects the search results.

To improve the ranking of an article in search for a given search term, you can optimize the article by making sure the search term appears in the searchable fields. For example, if you want to be able to significantly boost an article for a search term, you can add it as a search phrase and boost the search weight of search phrases.

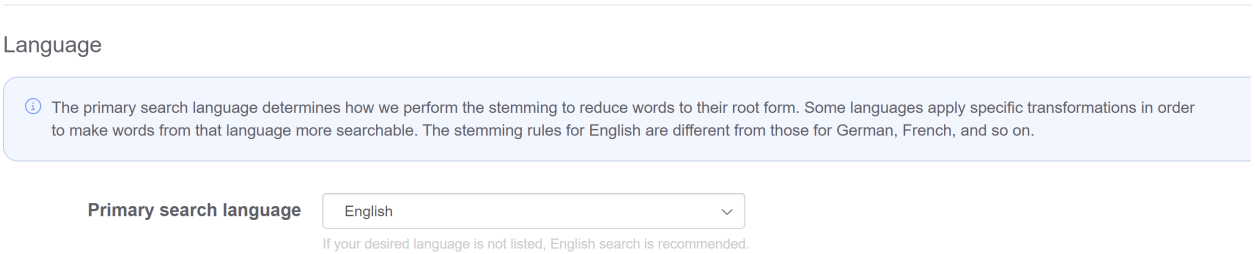
When you are happy with your weighting, click save to make the changes live. Adjusting search weights does not require a reindex.

Primary search language

Last Modified on 05/29/2024 5:28 pm EDT

Primary search language

The primary search language determines how we perform the stemming to reduce the words to their root form. You can set this in **Settings > Search** in the Language section:



Why does primary search language matter? The stemming rules for English are different from those for German, French, and so on. For example...

- In English, possessive "apostrophe s" is removed so that "Pete's" becomes "Pete".
- In French, elisions are removed so that "qu'est" becomes "est".
- In German, characters are normalized so that "hässlich" becomes "hasslich".

Changing your primary search language will require a search reindex.

Our search supports many of the world's most common languages:

- Arabic
- Armenian
- Basque
- Brazilian
- Bulgarian
- Catalan
- Czech
- Danish
- Dutch
- **English (default)**
- Finnish
- French
- Galician
- German
- Greek
- Hindi
- Hungarian
- Indonesian
- Irish
- Italian

- Kurdish
- Latvian
- Lithuanian
- Norwegian (Bokmål)
- Norwegian (Nynorsk)
- Portuguese
- Romanian
- Russian
- Spanish
- Swedish
- Turkish



If your language isn't listed, we recommend using English (the default).

Optimize search intro

Last Modified on 05/29/2024 5:28 pm EDT

We're often asked how people can optimize--or dial in--their search results.

This is a multi-step process.

First: we only recommend tweaking your search weights or other settings once you have some concrete, specific examples to test with. Optimizing search for one scenario can sometimes cause poorer search results for another, so it helps to have a few examples of search phrases you want to test with, so you can test the before/after effects of making any changes.

If you have a few good examples handy (as well as some examples that you want to be sure **won't** be negatively impacted by your changes), here are our recommended steps:

Use search settings

Last Modified on 05/29/2024 5:28 pm EDT

Most search options are controlled in the **Settings** > **Search** menu.

So this first tip is a fairly straightforward one: take a quick look through the options available here and be sure you're using--or not using!--settings that make sense for your content.

Options here include controls for:

- how your **results** appear (pagination, sorting, fuzzy search, your article blurbs, whether glossary terms are included)
- whether readers can **filter** your search results by top-level or second-level categories
- whether to use **autosuggest** results as people type their search phrase, and what the behavior for that autosuggest is
- if certain things should be included or excluded from search results (child shared content articles, an entire category, PDFs longer than 100 pages)

For a full breakdown of these settings, check out Configure Search.

Use indexed fields well

Last Modified on 05/29/2024 5:28 pm EDT

We automatically index the content in six article fields for search:

- Title
- Permalink/URL
- Body
- PDFs
- Meta description
- Search phrases

So the first step to "tuning" your search isn't really about search at all: it's about making sure that your content is well-structured in each of those fields.

Here are some key questions to get you started:

- Does the **title** present keywords that your readers might search for?
- Does the **permalink** present similar keywords?
  - If you need to update it, add the previous permalink as an Old Link.
  - And if you don't remember to do this, don't worry--you can turn on an option in **Settings > Basic** that will automatically prompt you to add the previous permalink as an Old Link.
- Does the **body** of your article contain the words and phrases people are most likely to search for?
- Do your articles **consistently use** the same word for the same concept, feature, or function? (This can include the article body, title, and permalink.)
  - This one can be easy to overlook, but if your knowledge base has evolved over time and there are older sections that haven't been updated in a while, you might be surprised!
- If you are including **PDFs** stored in KnowledgeOwl as hyperlinks or embedded in iframes, do they use similar terminology to your article body so that they still surface relevant content?
  - Sometimes, PDFs are written by a different team or department and they use totally different terminology. This can skew search results in odd ways or surface entirely irrelevant content.



Try to take a holistic approach here: any file of any type referenced in your knowledge base should use some key terminology the same way, wherever possible!

- Are you consistently adding a **meta description** to your articles?
  - This is an easy field to miss, since it's so far down in the editor, but it's a great practice for maximizing SEO on public knowledge bases.
  - If your knowledge base isn't public, it's still a fabulous field to use here, since it's basically a free indexing field. And, depending on your other settings, it may help display relevant information on category pages and in search results, too.
- Are you using search phrases? If not, see Use search phrases for more info!

Use search weights

Last Modified on 05/29/2024 5:28 pm EDT

The **Search Weights** controls available in **Settings > Search** let you set relative weights that will be used by the search ranking algorithm to determine the order of results returned. This lets you dial in your search a bit to fit your content.

By default, all six of the fields we index for search (article title, permalink, body, PDFs, meta description, and search phrases) are given an equal weight of 1. Giving a field a higher index will boost its importance in the relevancy.



A brief warning: We recommend only touching search weights once you have a fair amount of content and/or once you've gotten feedback from readers that they've had trouble finding something.

The best way to make changes here is to have a few specific examples to test with.

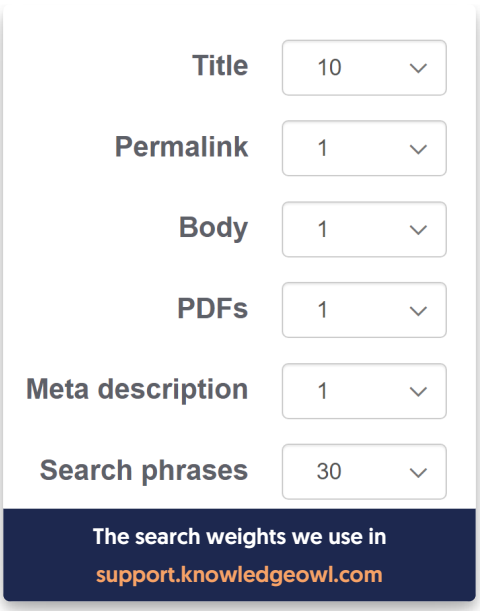
Then:

1. Go to **Settings > Search**.
2. In the **Search Testing** box, enter one of your test search phrases. Note the relevancy scores and order it gives back to you.
3. Make changes to the field(s) you think need higher search weights in the **Search Weights** section. We recommend only going up by the next available increment in the dropdown to start. Don't save your changes yet. ☺
4. Now rerun your test search phrase in the **Search Testing** box. See if you've gotten closer to the order you're looking for.
5. Test with multiple phrases to be sure that you haven't optimized for one scenario but hurt another one. (This is the tricky part of touching your search weights!)
6. Once you've found a weight you like, **Save** your changes.

You won't need to reindex or anything--those weight changes will take immediate effect. If your weights are getting closer but still not amazing, see the next tip on search phrases!

See Search Weights and Search Testing for more details.

As an example, here are the search weights we're currently using in support.knowledgeowl.com:


Title
10
Permalink
1
Body
1
PDFs
1
Meta description
1
Search phrases
30
The search weights we use in
support.knowledgeowl.com

Use search phrases

Last Modified on 05/29/2024 5:28 pm EDT

By now, I hope you've picked up on the fact that you don't need to do anything for your content to be indexed for search--it just is.

So why do we include search phrases, if we're already indexing the title, permalink, body, PDFs, and meta description?

To give you more control.

Search phrases serve two main purposes:

1. You can add a search phrase that doesn't appear in the body of the article. This can be really helpful if there's an alternate phrase or term that your readers might use that you don't want in the documentation itself, like an acronym or abbreviation.
    - For this use case, you don't need to do anything else special--just add the search phrase. (And if you have a lot of these, see our next search optimization tip on synonyms--you're gonna love them!)

2. You can add a search phrase to "bump up" a select number of articles that contain that phrase. So if you have 50 articles all of which mention the word "cheese", you might add "cheese" as a search phrase only to the 3-5 most important articles about cheese. This lets you game the ranking algorithm just a little.
    - In this scenario, you'd likely want to increase the search weight of Search Phrases so that they'd be weighted a bit more. (We do this in our Support knowledge base, using a search weight of 30 for search phrases.)

This second setup can be really useful when you use a term in a lot of your documentation, but you want to curate some articles to return at the top of the search when that term is searched.

Again, you don't need to change any settings or reindex to use this option; you just need to add relevant search phrases to your article and save it.



Pro tip: if you want to audit where search phrases are used, you can head over to Manage Articles and take a CSV export of any view there--you can choose to include the Search phrases column in your CSV export!

Use synonyms

Last Modified on 05/29/2024 5:28 pm EDT

Synonyms are one of the unsung heroes of your knowledge base. You probably don't know they're there, but they can make a huge difference to how you write your content--and how it's indexed.

Synonyms' entire purpose is to help your search index work harder and do more.

Let's return to that first use case we mentioned for search phrases:

You can add a search phrase that doesn't appear in the body of the article. This can be really helpful if there's an alternate phrase or term that your readers might use that you don't want in the documentation itself, like an acronym or abbreviation.

So, for example, in our documentation, we use the phrase "knowledge base" a fair amount. We believe strongly in the two-word format. It's in our style guide.

This is great, from a content creator's perspective: we're totally consistent in our content.

But we get a lot of readers who might search for various permutations of that word, including:

- knowledgebase
- kbase
- k base

Now, one way to address this would be to add a search phrase for each of these variations to every article where we use the phrase "knowledge base". That would solve the problem--someone searching for one of these variations would get to the content they need.

But that puts a lot of pressure on us to *remember to do that*.

And what happens if we find out next week that people start searching for "base site" or something else? We'd have to go manually edit all those articles to have that search phrase, too.

This is where synonyms really shine.

You define the synonym once, then you reindex your knowledge base, and our search indexing *does that work for you*.

So in our case, we never worry about adding "knowledgebase" or "kbase" as a search phrase, because we have a global synonym defined for it. And we can go update that synonym at any time and (once we run a search reindex) it will take effect across all of our articles.

Synonyms are fantastic for things like:

- Variations of the official term you use for something
- Acronyms or abbreviations your readers might search for that correspond to official terms--this way you don't necessarily have to include both the fully-written-out term and the acronym in every article

The one key here is that after you create synonyms, you will need to reindex your knowledge base to see them take effect. Reindexing can take a couple minutes and it will knock out search results while it runs, so it's generally best to time your reindexes for off-hours.

Use Searches with no results

Last Modified on 05/29/2024 5:28 pm EDT

So you've gotten your search behaving fairly well overall, and things seem to be humming along great: you've gotten the settings how you like them, your content's using consistent terminology, you've tweaked your search weights a little, and you're using search phrases or synonyms to really stretch search.

Now what?

Generally, if you don't get complaints about people being unable to find things, there's not a whole lot else to do.

But if you like to keep an eye out for potential synonyms, content gaps, or search phrase needs, check out the Searches with no results report in **Reporting > Dashboard**.

This will help you identify words or phrases that your readers are searching for and coming up empty. Sometimes these are great candidates for synonyms or search phrases; sometimes they alert you to content gaps; sometimes they can even clue you in to features that your product or company is lacking.

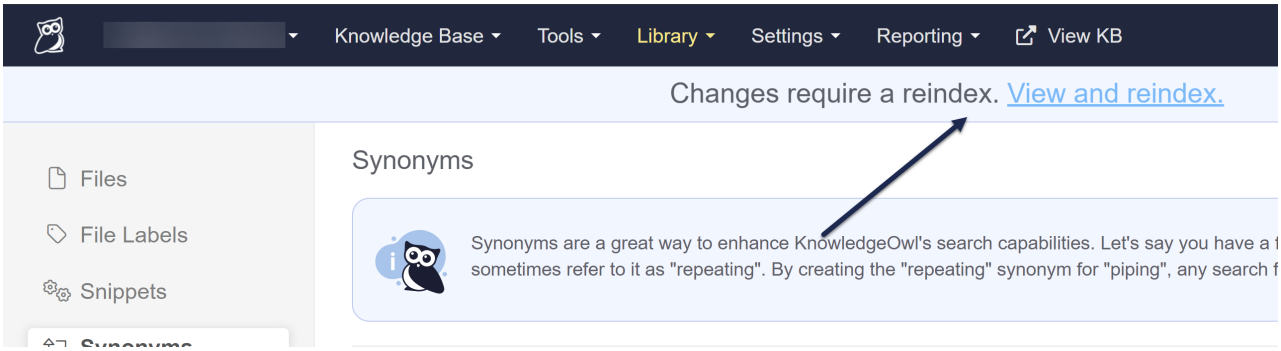
In an ideal world, you'd want to include reviewing this report into a regular content update habit, though the frequency of this depends on how high your knowledge base usage is.

Run a required search reindex

Last Modified on 05/29/2024 5:28 pm EDT

Once you change your primary search language or create, edit, or delete a synonym, those changes won't take effect until you reindex your knowledge base for search. This can be considered a "required" search reindex, since you won't see updates appear until the reindex has been run.

You'll see a message appear across the top of most pages when you've made this type of change:

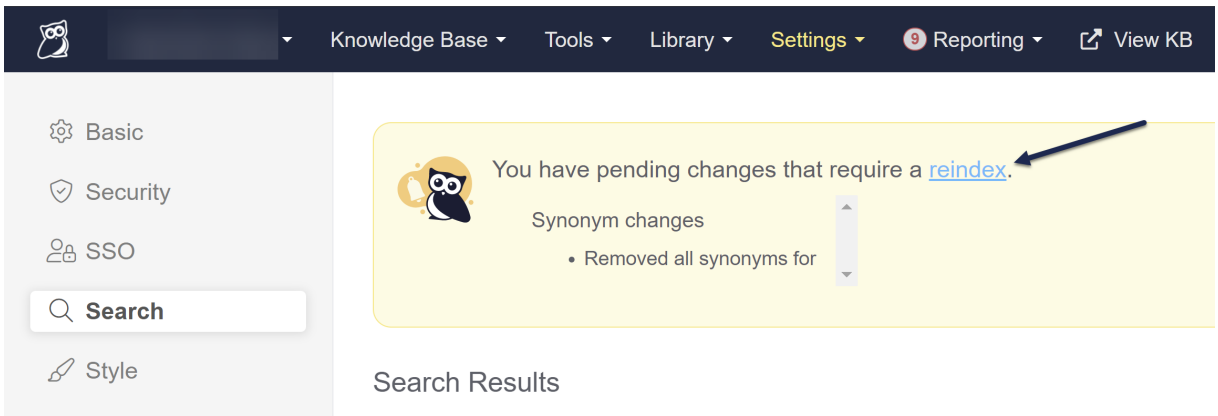


To complete the reindex:

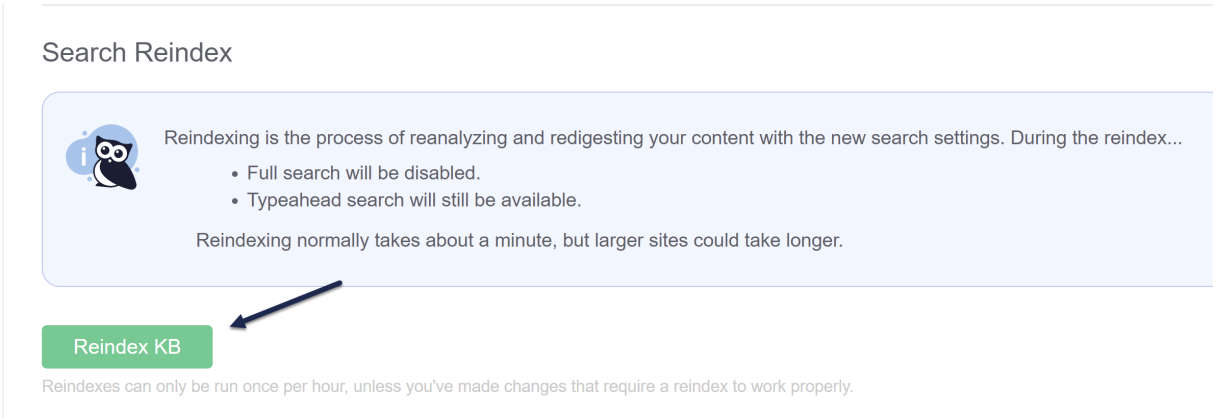
1. **Click the View and reindex link in that message, which will jump you to the Settings > Search page.**

   If your knowledge base is actively used, we recommend running a search reindex after-hours, since it will knock out full search results while it runs.

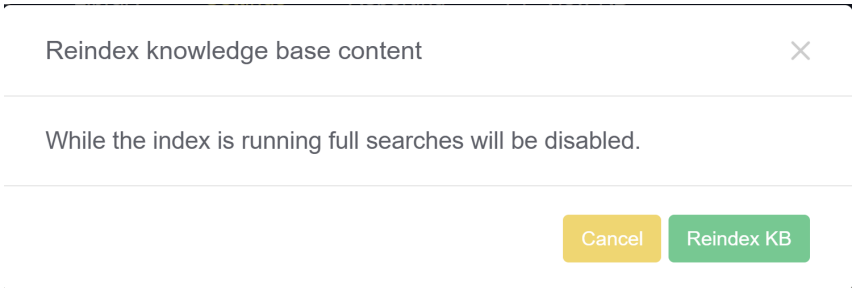
2. **Click the link in the warning at the top to jump to the Search Reindex section:**



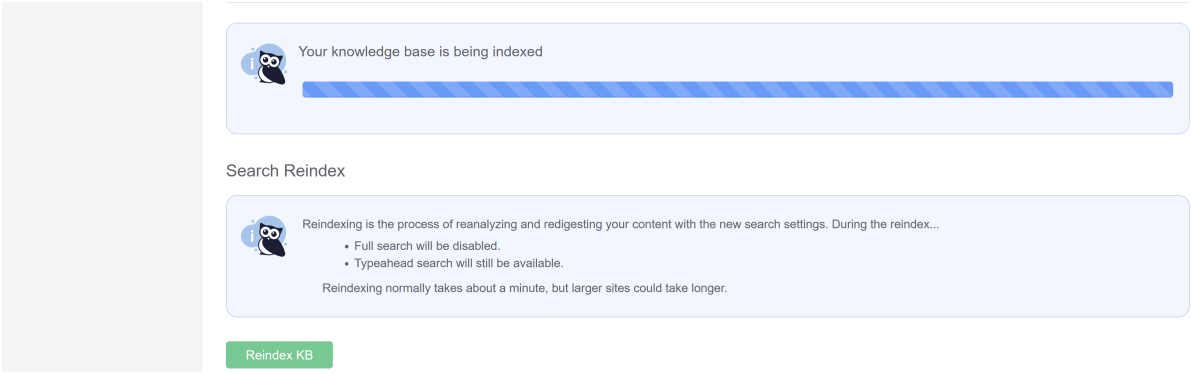
3. **Click the Reindex KB button to trigger the reindex:**



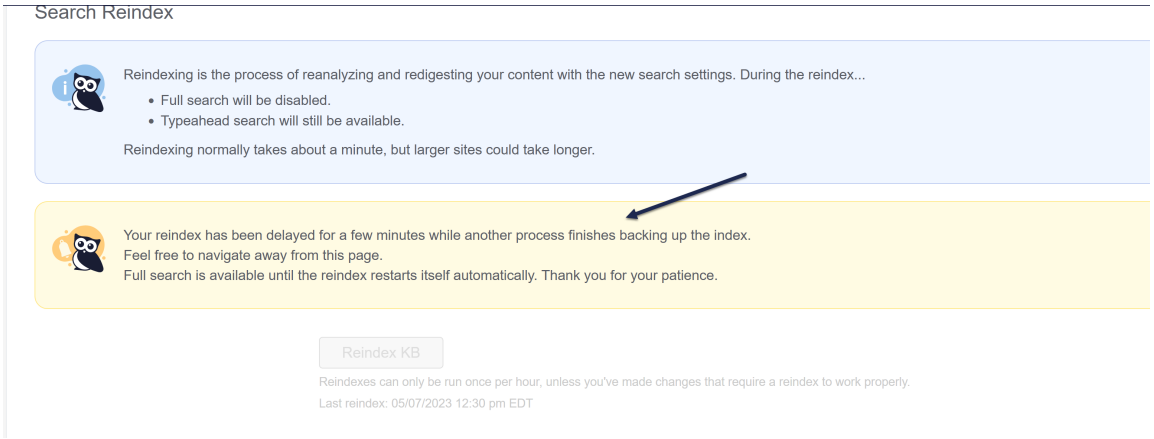
4. **A confirmation pop-up will appear, warning you that full search will be disabled while the reindex runs. To run the reindex, click the Reindex KB button in that pop-up.**



5. **You'll see a progress bar while the reindex runs:**



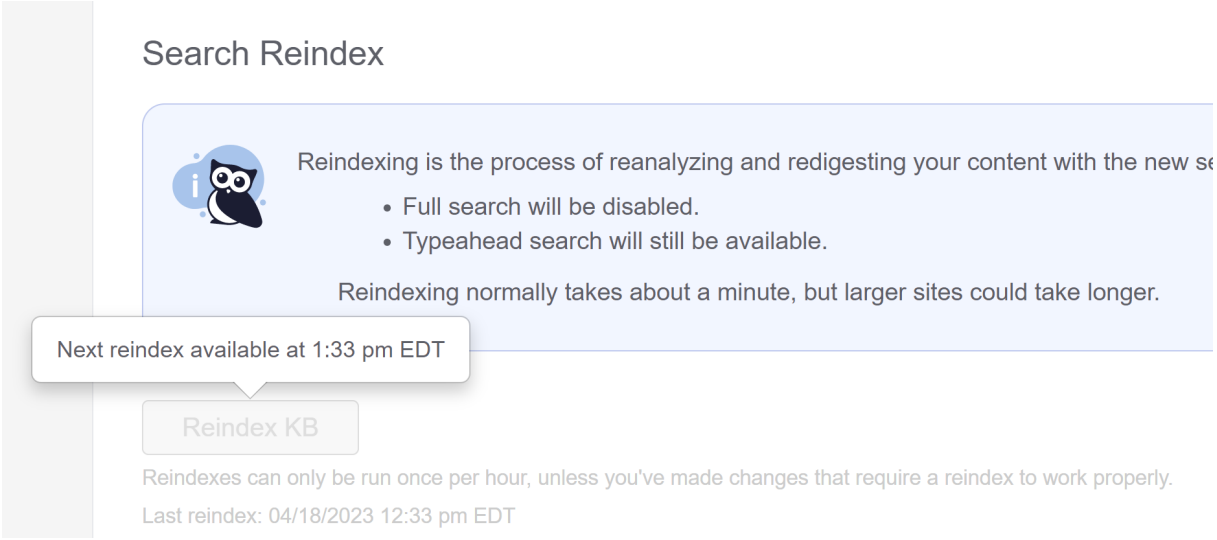
   a. **You may see a warning message before the progress bar appears:**



This just means the reindex has been briefly delayed. The progress bar should appear momentarily!

6. **Once the reindex is complete, the progress bar will disappear and a timestamp for the last reindex will be displayed beneath the Reindex KB button. Your synonyms are now live!**

7. **For the next hour, the Reindex KB button will be disabled. Hovering over the Reindex KB button will show you when the next reindex can be completed. If you do make other changes to synonyms or your primary search language, you will be able to reindex again within the hour, though.**



If your reindex progress bar seems to get stuck for more than 10 minutes, please contact us for further investigation!

Run an optional search reindex

Last Modified on 05/29/2024 5:28 pm EDT

In addition to required search reindexes, occasionally you may want to run a search reindex ad hoc.

You shouldn't ever *have* to do this--articles are generally reindexed for search as you save changes to them.

But once in a while, due to a glitch on our side or an outage, something may have gone wrong when we automatically reindexed content.

If you notice search results not updating with recent changes and the article or category in question hasn't been excluded from search results, running a reindex is usually the first troubleshooting step our team takes, so you may want to run one yourself before reaching out to our team.

You are limited to running **one search reindex per hour**. We disable the button and prevent further reindexes from being run, unless you make a change that triggers a required search reindex.

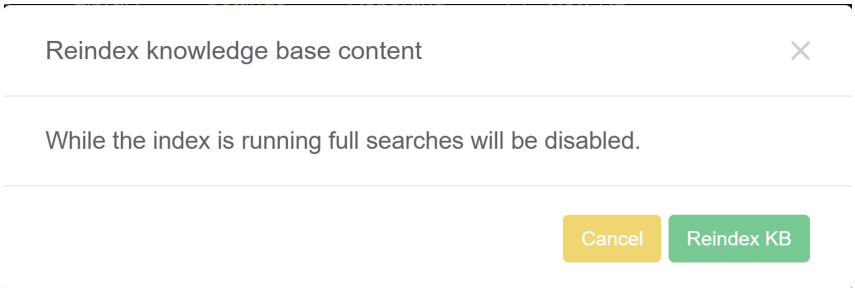
To run an optional search reindex:

You must have the standard Editor role or have a custom author role that includes the **Update search settings, synonyms, and reindex search** permission to run a search reindex.

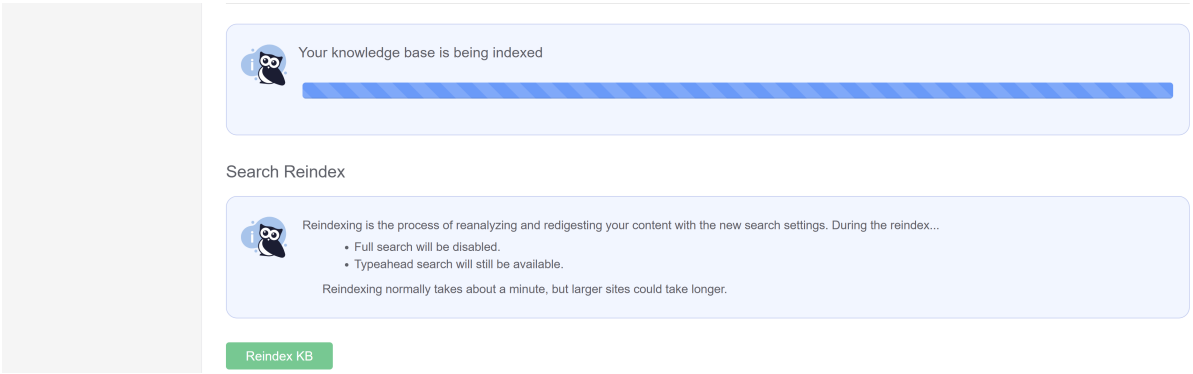
1. Go to **Settings > Search**.
2. Scroll to the **Search Reindex** section.
3. Click the **Reindex KB** button to begin the process.

   Full search results will be disabled while the reindex is running. If your knowledge base is actively used, we recommend running a search reindex after-hours.

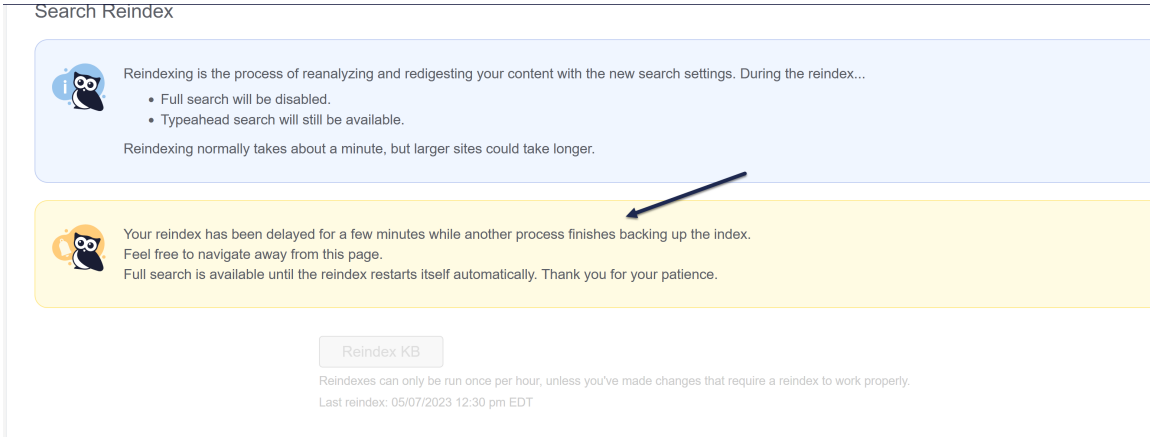
4. You'll see a pop-up confirming you want to proceed. If you're running the reindex at a time where it won't matter that full search results are briefly disabled, click **Reindex KB** to confirm the process and begin the reindex.



5. **You'll see a progress bar while the reindex runs:**



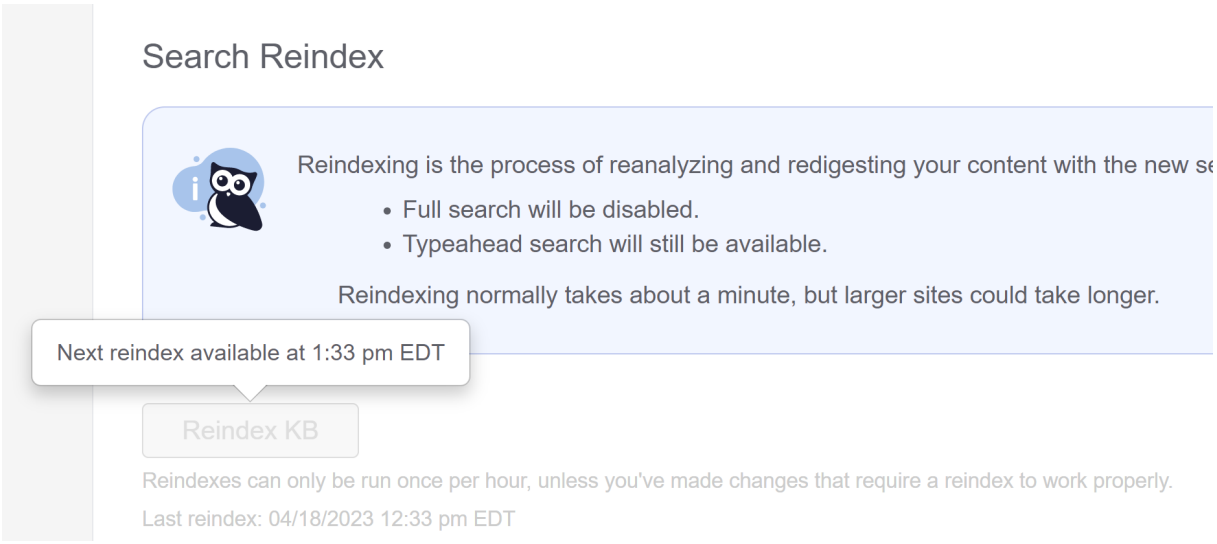
   a. **You may see a warning message before the progress bar appears:**



   This just means the reindex has been briefly delayed. The progress bar should appear momentarily!

6. **Once the reindex is complete, the progress bar will disappear and a timestamp for the last reindex will be displayed beneath the Reindex KB button.**

7. **For the next hour, the Reindex KB button will be disabled. Hovering over the Reindex KB button will show you when the next reindex can be completed.**

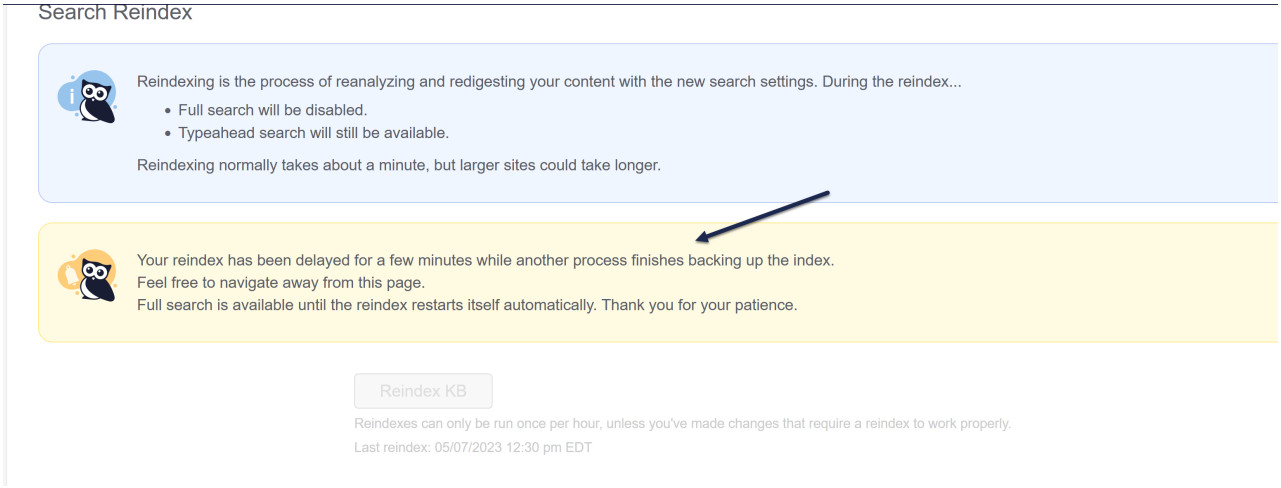


If your reindex progress bar seems to get stuck for more than 10 minutes, please contact us for further investigation!

Delayed reindex

Last Modified on 05/29/2024 5:28 pm EDT

Sometimes when you run a reindex, you may see a warning appear that the reindex has been delayed:



If you see this warning, don't panic!

You can consider this a courtesy message: we're just trying to let you know it will take a bit before the reindex starts so you don't feel worried that it's taking longer than it might normally.

We run automatic back-ups of all search indices. If you see this warning, it just means that your search index was in the act of being backed up when you tried to reindex. Since we can't back up something while it's being edited, we delay the start of your reindex until the back-up is complete. We'll start it after the back-up is done.

You don't need to do anything else here--we will automatically begin the reindex after the back-up is complete. This usually takes a few minutes to complete, and you're welcome to navigate away during that time.

If you stay on the page, after a few minutes, the warning will disappear and the normal reindex progress bar and completion messages will start back up.

Searching the knowledge base

Last Modified on 05/29/2024 5:28 pm EDT

There are two basic types of search functions in your knowledge base:

- **Autosuggest:** When a reader starts typing into the search bar, we will instantly suggest possible articles based on what they've typed.
- **Full text search:** When the reader hits enter or clicks on the search button, they are redirected to a search results page which provides the full text search results.

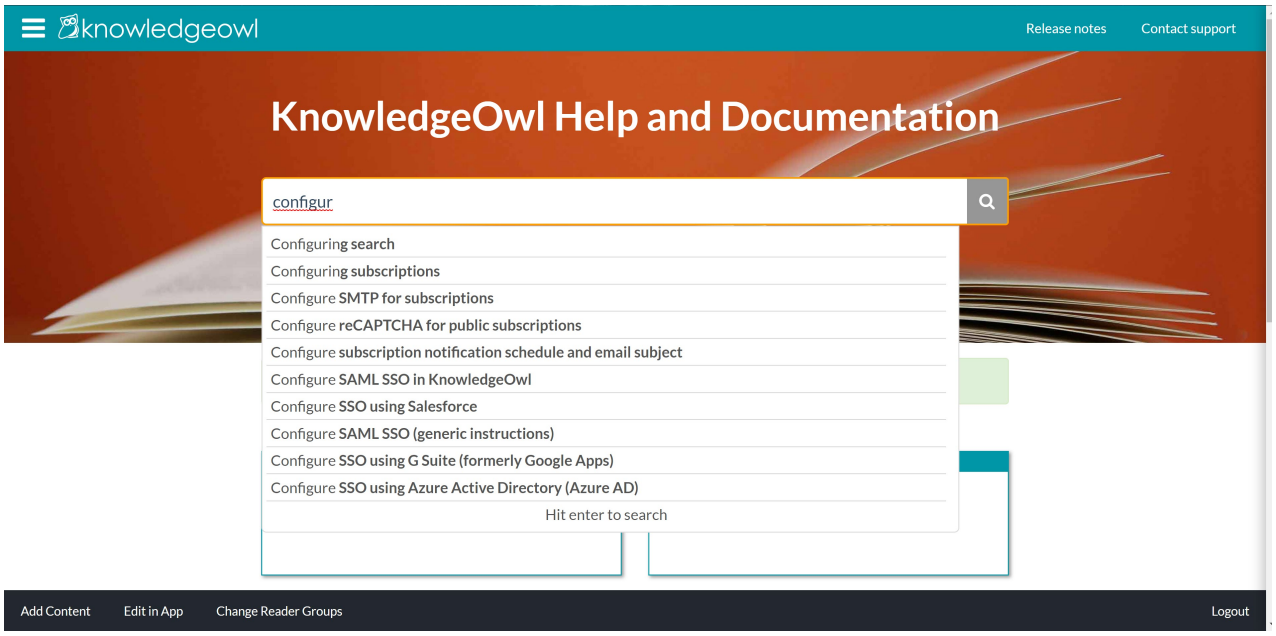
Below is a breakdown of the main differences between autosuggest and full text search.

Autosuggest	Full text search
Suggests below the search bar as you type	Displays on search results page after hitting enter
Searches title, search phrases, permalink, and meta description (no body or PDFs for speed)	Searches title, body, pdfs, search phrases, permalink, and meta description
No synonyms	Synonyms
Limited to top 10 suggestions	Displays full results with pagination
Highlights differences in title	Highlights matches in blurb

Autosuggest search

Last Modified on 05/29/2024 5:27 pm EDT

The goal of autosuggest search is provide the reader with intelligent article suggestions based on what they type in the search box.



In order for it to be as fast as possible, we only search within the title, search phrases, permalink, and meta description. We index N-grams, or continuous sequences of characters, from these search fields.

For example, if I have an article called "Autosuggest", we would index a series of N-grams like "a", "au", "aut", and so on. This way, the search can instantly suggest possible matches as the reader types.

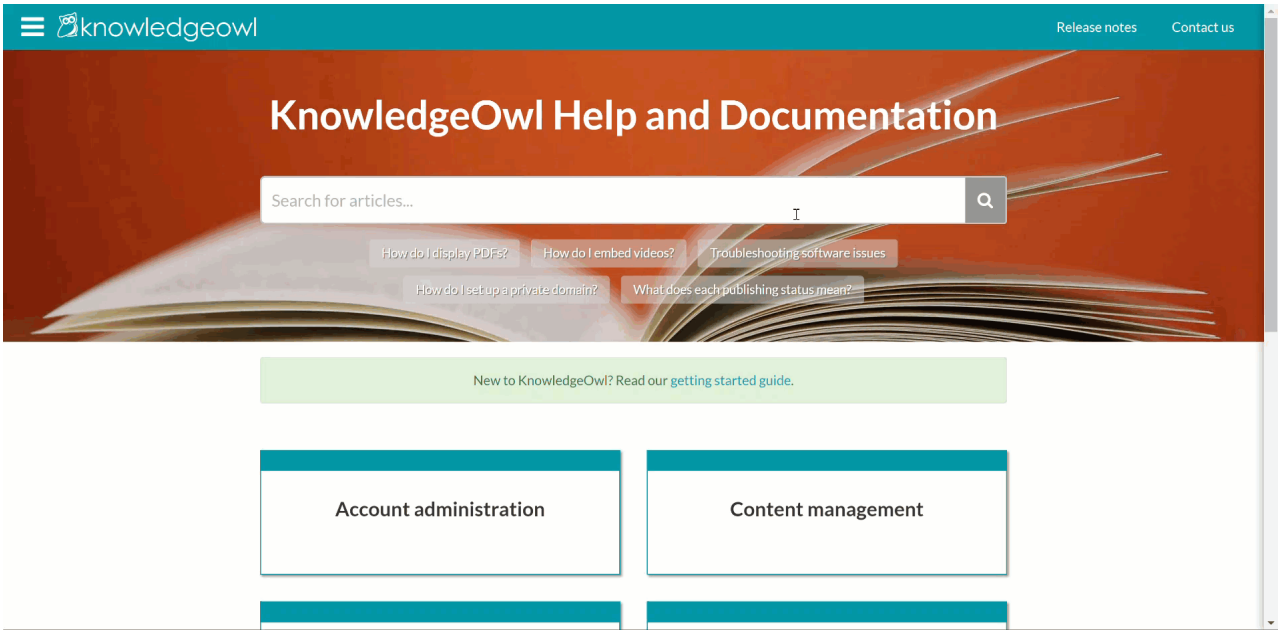
We check through all the searchable fields for possible matches and calculates a relevancy score. The field with the best possible match gets a boost, but we also factor in other matching fields as well as any customized search weights.

Autosuggest doesn't require an exact match to suggest relevant articles, and you can choose to make it fuzzy (tolerant of typos).

Full text search

Last Modified on 05/29/2024 5:28 pm EDT

The goal of full text search is to provide the reader with all of the relevant results.



The main measurements of search are precision and recall.

- **Precision is the percentage of search results that are relevant. For example, if your search returns 100 articles but only 80 of them are relevant, the precision is 80%.**
- **Recall is the percentage of total relevant article that are returned in the search. If your search term should match 10 relevant articles but only 9 are returned, the recall is 90%.**

It's very difficult, and many would argue impossible, to have 100% precision and recall. When you try to ensure that 100% of the relevant articles show up, you often end up including some non-relevant ones too, lowering the precision. When you try to ensure that 100% of the search results are relevant, you often end up excluding some relevant ones, lowering recall.

Our goal is to provide the best possible combination of precision and recall. From our conversations with customers and industry research, we decided it's better to err on the side of recall (including all the relevant articles) and let go of precision to ensure readers are able to find what they need.

Since the search results are sorted by relevancy and most people don't dive too deep into results, having some irrelevant articles showing up lower in the search is better than people not being able to find what they searched for.

Exact match searches

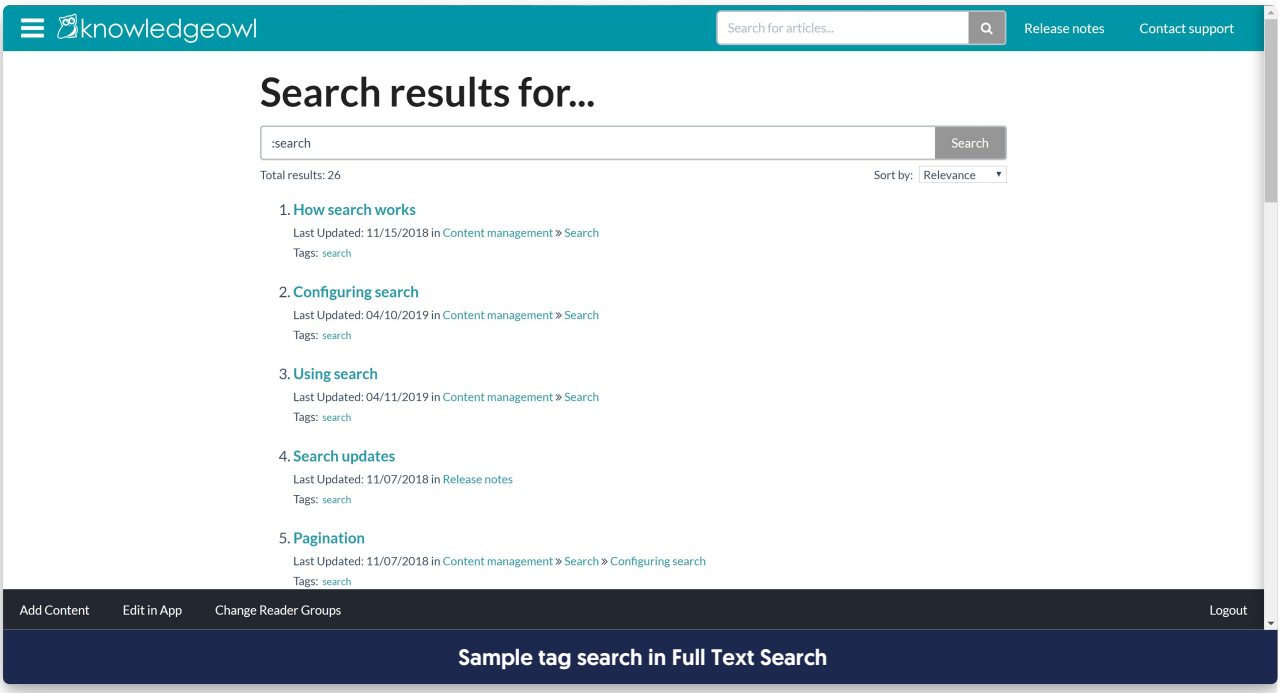
Last Modified on 05/29/2024 5:28 pm EDT

You can perform exact match searches by surrounding your search term in quotation marks. When you perform an exact match search, we perform a special algorithm that looks for exact matches for your search term in the search fields. It is not tolerant of typos and does not allow for variations in proximity (search term must appear in the exact order).

Tag Searches

Last Modified on 05/29/2024 5:28 pm EDT

You can search for articles by tag, rather than keyword, by putting a colon before the start of the word. This format works in both autosuggest and full text search modes.



Sample tag search in Full Text Search

Tag search case sensitivity

Tag searches initially are a case-sensitive search (e.g. they will look for :Search if that's what you typed). If no results are returned from the case-sensitive search, the tag search will then automatically re-search using a case-insensitive version (such as :search).

Tags versus search phrases

Last Modified on 05/29/2024 5:28 pm EDT

One of our most frequently asked questions is what is the difference between tags and search phrases. While they appear similar, they perform different functions.

Tags are like categories

- Categories and tags are used for organization and navigation.
- Tags are added to articles describe what the content is and what it relates to, and articles are put into categories for the same purpose.
- Both are visible to the reader.
- Neither are indexed for search but they display in the search results to provide additional context.
- Readers can click on tags or categories in search results to navigate to a list of related articles.

Tag example

You might have a tag called "troubleshooting" which tells you and the reader that (a) this article is about troubleshooting and (b) there are probably other articles which are about troubleshooting as well. By clicking on the tag, the reader can navigate to a list of all articles with the tag "troubleshooting".

You can manually pull up a list of all articles with a tag using the search. The syntax to return a list of articles with a tag is ":tag name". This tells the search to skip the normal search and return a list of all articles with the specified tag. Putting ":troubleshooting" into search would return all articles with the tag "troubleshooting".

Search phrases are like keywords

- Keywords and search phrases are tools to find things using a search engine.
- Both are part of the content and indexed for search.
- Neither keywords or search phrases are visible to the reader.

Search phrase example

Maybe you have an article on troubleshooting computer errors. If you have a Windows computer, you might be familiar with the "blue screen of death". If you are on a Mac, you might be familiar with the equivalent "spinning beachball of death" or one of its variations.

When someone types in one of the colorful variations of these problems, you want this article to come up but you may not want to add all these "of death" variations to your visible content. This is the perfect time to use search phrases.

You can add all the variations of the error as search phrases, which are hidden from the reader but get indexed for search. This way, the next time someone types "spinning pizza of death" or its acronym "SPOD" into search, your article on troubleshooting computer errors will appear.

Why is my category not showing up in search?

Last Modified on 05/29/2024 5:28 pm EDT

First, check what type of category it is: only custom content and topic display categories are indexed for search. Default, blog, and URL redirect are not currently searchable.



Workaround: Create an article with the same name that is hidden from navigation and redirects to your category URL. This way, the article shows up in search but clicking it navigates to your category.

Second: if it's a custom content category or a topic display category, check if the **Exclude from search results** box has been checked.

Third: If the box isn't checked but the category still isn't showing up in search, go to **Settings > Search** and see if the category (or its parent category) has been set up as an Excluded category.

How do I add keywords to my article?

Last Modified on 05/29/2024 5:28 pm EDT

You don't need to add keywords to your articles for your content to be searchable. By default, we indexed your title, body, permalink, meta description, search phrases, and PDFs. Your articles should be searchable by any word you use in your content.

If you have a keyword or search term that doesn't appear in your article (or you want to boost the relevance of an article for a certain keyword), you can use search phrases. Search phrases are like keywords in that they are hidden from the reader but indexed for search. You can boost the weight given to search phrases under **Settings > Search**.

Search doesn't work for unhyphenated versions of hyphenated words.

Last Modified on 05/29/2024 5:28 pm EDT

That's not a question, but we have an answer! You can use synonyms to ensure that both versions of word bring up the same search results. When you set up a synonym for your hyphenated word, use a space instead of a hyphen since that is how we store it in the index.

For example, we have an article called "List of Sub-processors" but searching for "subprocessors" didn't work.

When we index your content, hyphenated words are split on the hyphen. This stores them as two separate tokens, which is why the search for the single word doesn't work.

To fix this, we created a synonym. Since hyphens are stripped, we needed to store the original word as "sub processors" (no hyphen) which is how the word is stored in the index.

- **Original word:** sub processor (sub-processor replacing the hyphen with a space)
- **Synonym:** subprocessor

Once we reindex with the synonym, my search for "subprocessor" now finds the "sub-processor" article. By adding a synonym called "subprocessors", we told the term that these two words have the same meaning.

Use Google Custom Search Engine in KnowledgeOwl

Last Modified on 05/29/2024 5:28 pm EDT

Google Custom Search Engine allows you to create a custom search engine for your knowledge base powered by Google. It's free, but you are required to show ads unless you are a non-profit or a school. If that's not a dealbreaker for you, you can also monetize your knowledge base using Adsense.

You can learn more on Google's Custom Search Help or create a custom search engine here.

Implementing Google CSE in KnowledgeOwl

To integrate Google CSE in to your KnowledgeOwl knowledge base, you'll need two things:

1. A page to hold your CSE code
2. A search form to send your readers to the search page

Creating a page to hold the search results

We recommend using a custom content category for your custom search. This will provide a nice blank canvas for the search input and results to be displayed. You can check the option to hide the category from navigation so it doesn't show up in your navigation.

You can drop your CSE JavaScript snippet directly into the body of the category. Using the Standard element type is the easiest to implement, though you may have to do a bit more work to override Google's default styles if you'd like a branded search form.

Now's a good time to pause (and save), and check out your new search page! Click View Category at the top of the screen to see your custom search page in action.

Adding search forms to your homepage or articles

Allowing your readers easy access to this search page is the next important piece of the puzzle. At its simplest, this could be set up with an ordinary **hyperlink** to the category page ("Click here for our search page").

You can go a step further by using an **HTML form** instead of a hyperlink. This will allow you to add a textbox, and pass the reader's search terms as a **query string** to your search page. Google CSE automatically picks up queries embedded in the URL, so seamlessly integrating this new search capability anywhere in your knowledge base becomes a snap!

Below is an example of how this search form might look.

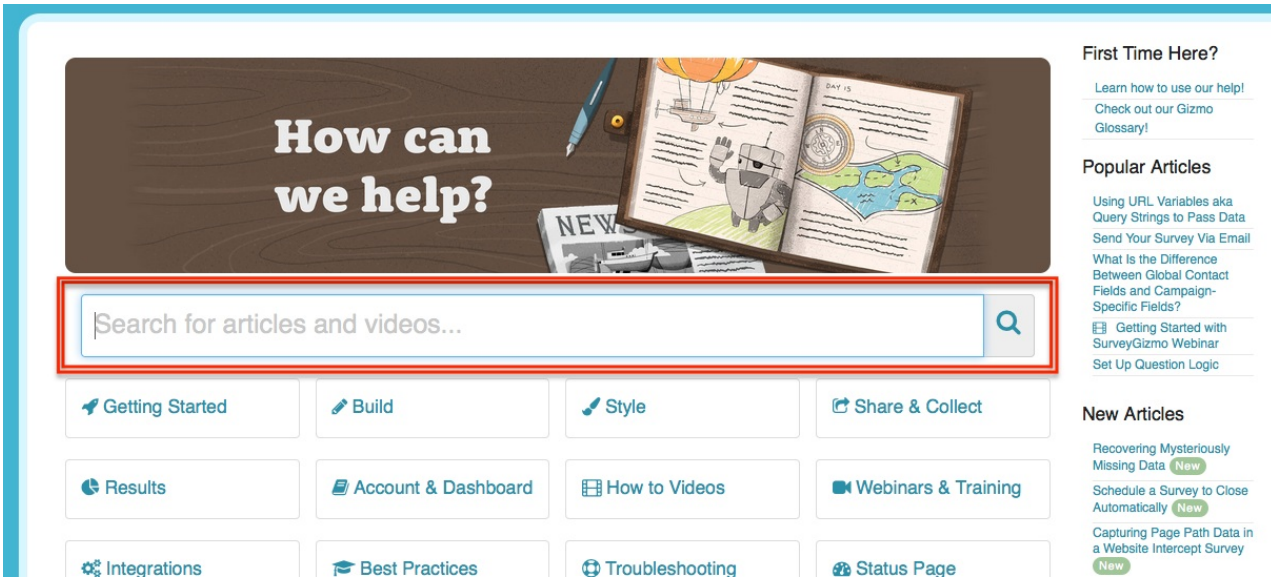
```
<form action="/help/search-results/" method="get">
  <input name="q" type="text">
  <button type="submit">Search</button>
</form>
```

Three important things to note:

1. **The form action points to the URL of the search "category page".**
2. **The form method is "get".**
3. **The text input name is "q".**

The text input name you can actually change to whatever you'd like, be sure to make the necessary adjustments to your Google CSE code, so it knows to look for the query string by that variable name.

By including a form like the one above on your homepage or in your top navigation, your readers will now have easy access to your Custom Search Engine!



Can I exclude an entire category--and all its articles--from search?

Last Modified on 05/29/2024 5:27 pm EDT

You can exclude one category--and **all** of its contents--from search automatically using our Exclude category from search setting.

You can also always exclude individual articles from search using the "Exclude from search results" checkbox in the article.

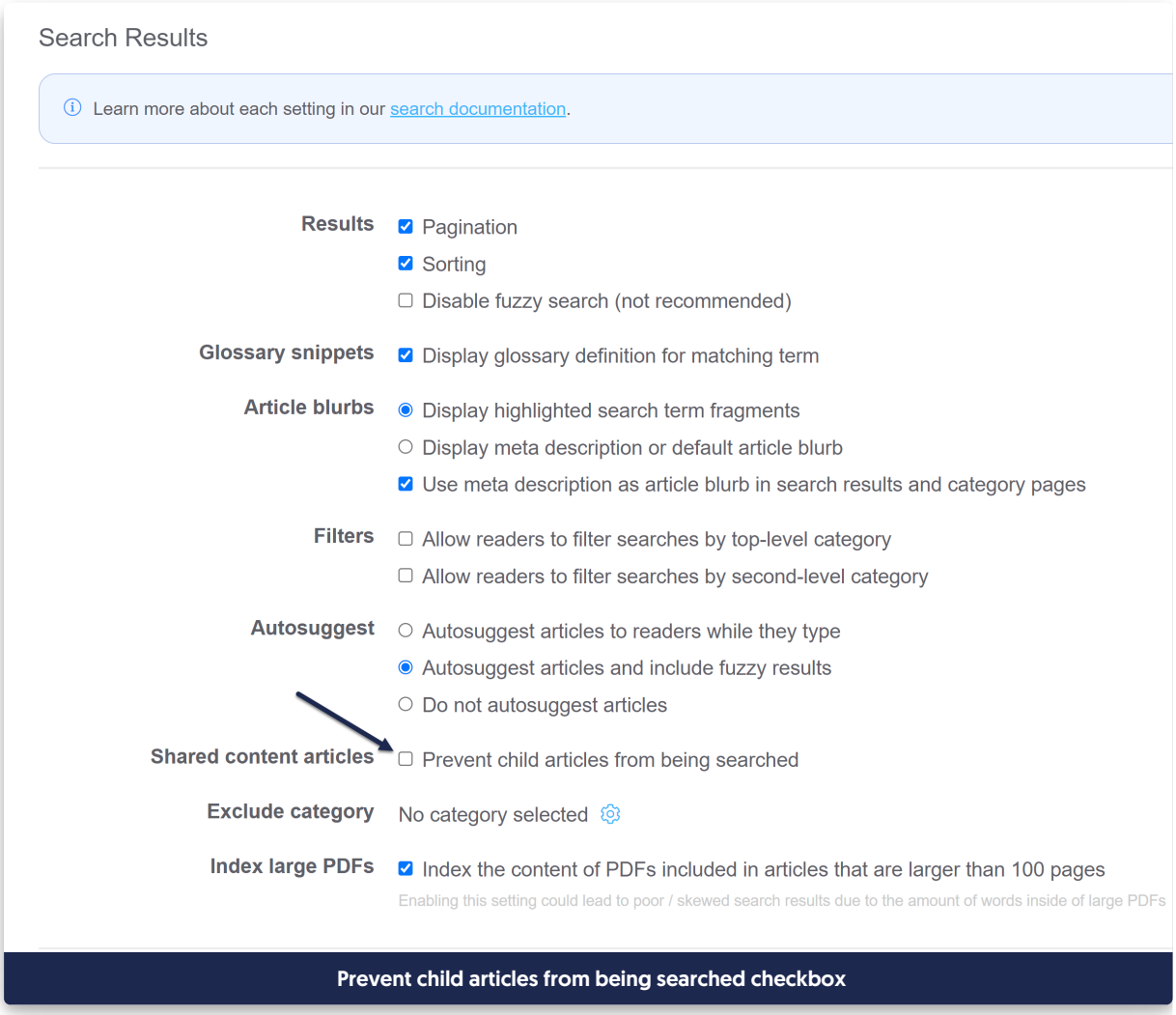
Why is my shared content article not showing up in search?

Last Modified on 05/29/2024 5:28 pm EDT

When you create an article using the option to Share content from an existing article, it is considered a "child" article (the original is considered the "parent".) By default, child articles are excluded from search.

To enable child articles to show up in search:

1. Go to **Settings > Search.**
2. Next to **Shared content articles**, uncheck the box next to **Prevent child articles from being searched.**



Prevent child articles from being searched checkbox

3. **Save.**

Search basics

Last Modified on 05/29/2024 5:28 pm EDT

The goal of search is to get readers to relevant content. There are many things happening behind the scenes to help make this happen. As much as possible, our goal is to provide a search that works really well out-of-the-box while also giving you visibility and control over your search results.

The heart of any search engine is the index, which is where (and how) your content is stored for retrieval. KnowledgeOwl automatically indexes the most important fields of your content for search:

- Title
- Permalink
- Body
- PDFs
- Meta description
- Search phrases

You do not need to add tags or keywords for search to work. Any words you use in the indexable fields will automatically be searchable.

Here's a quick overview of what is and is not indexed for search:

	Indexed / searchable	Optional indexed / searchable	Not indexed / not searchable
Types of pages	Articles Custom content categories Topic display categories	Glossary (*if appropriate settings are selected)	Default categories Blog style categories URL redirect categories
Fields	Title Body Permalink Meta description Search phrases PDFs	Glossary terms The word "Glossary"	Tags (searchable only using tags search) Category / breadcrumbs Glossary term definitions

You can control your search scores and results through a few different methods. See Optimize search for a detailed walkthrough of the strategies we suggest!

Indexing

Last Modified on 05/29/2024 5:28 pm EDT

The knowledge base index is where we store your article content and meta data after we process and optimize it for searching.

When you save an article, we automatically digest and analyze your content for the index. This process involves:

- Stripping out HTML
- Breaking up the text along word boundaries (tokenization)
- Breaking up tokens into small fragments, called N-grams, for partial matches and autosuggestions
- Removing punctuation
- Lowercasing all tokens
- Stemming all tokens based on your chosen primary search language
- Adding the synonyms from your library for matching tokens

Reindexing

The initial index is automatically created when you save an article. If you make a change to your search settings that affects how the data is processed, your knowledge base will need to be reindexed. Reindexing is the process of reanalyzing and redigesting all of your content.

Changes that require a reindex are:

- Changing the primary search language
- Adding, removing, or altering synonyms

During a reindex, full search will be disabled but autosuggest search based off of article titles will still work. Reindexing normally takes less than a minute, but larger knowledge bases or knowledge bases with very lengthy articles could take significantly longer.



If your knowledge base is critical to your business, we recommend waiting until off-hours to run a reindex in case it does take longer, especially the first time you reindex!

Stemming

Last Modified on 05/29/2024 5:28 pm EDT

Stemming is the process of reducing words to their base or root form. For example, "searching", "searches", and "searcher" can all be reduced to the word "search". This is called the stem. In our search, stemming happens automatically in the background as part of the indexing and reindexing processes.

Stemming helps make search smarter. It's how search engines can find the results you want even when you don't type the exact words.

Stemming is a core task of Natural Language Processing (NLP). NLP is a branch of artificial intelligence (AI) that focuses on how computers process and analyze natural human language. It is not related to generative AI like ChatGPT.

Search relevance scoring

Last Modified on 05/29/2024 5:28 pm EDT

When a search is performed, relevance algorithms are used to weight the results. The algorithms assign a score to each matching search result, and the search results are ranked by score.

The following are simplified explanations of the types of algorithms used:

1. **The exact match**
   All words in the search term must appear in a searchable field for it to be considered a match. This algorithm has no tolerance for typos, but it allows for some variation in proximity of the search terms (words don't have to be in the exact order and can have a few words between them). Any matching result gets a significant boost in score because it exactly matches what a reader typed into the search.

2. **The mostly match**
   75% of the search term must appear in the searchable fields. This algorithm has no tolerance for typos. Matching results get a slight boost in score.

3. **The somewhat match**
   50% of the search term must appear in the search fields. This algorithm is tolerant of typos. Matching results receive the lowest boost.

4. **The maybe match**
   Some of the search terms much match. This algorithm is tolerant of typos. No boost is applied.

In order for an article to appear in search results, it must be considered a match by at least 2 of the algorithms. Scores from all algorithms are combined to determine the article ranking.

The algorithms consider three main factors when calculating scores:

1. **Term frequency**
   This is how often the search term appears in an article. The more times it appears, the higher the score.

2. **Inverse document frequency**
   This is how often the search term appears across all your articles. If the search term shows up in many articles, it will have less weight in scoring. If the search term only appears in a few articles, it will result in a higher score.

3. **Field length**
   This is how long the searchable field is. If it's really short, like an article title, matches will have more weight since it's more likely to be significant.



Tags do not impact search weights or relevancy scores.

A note on algorithms

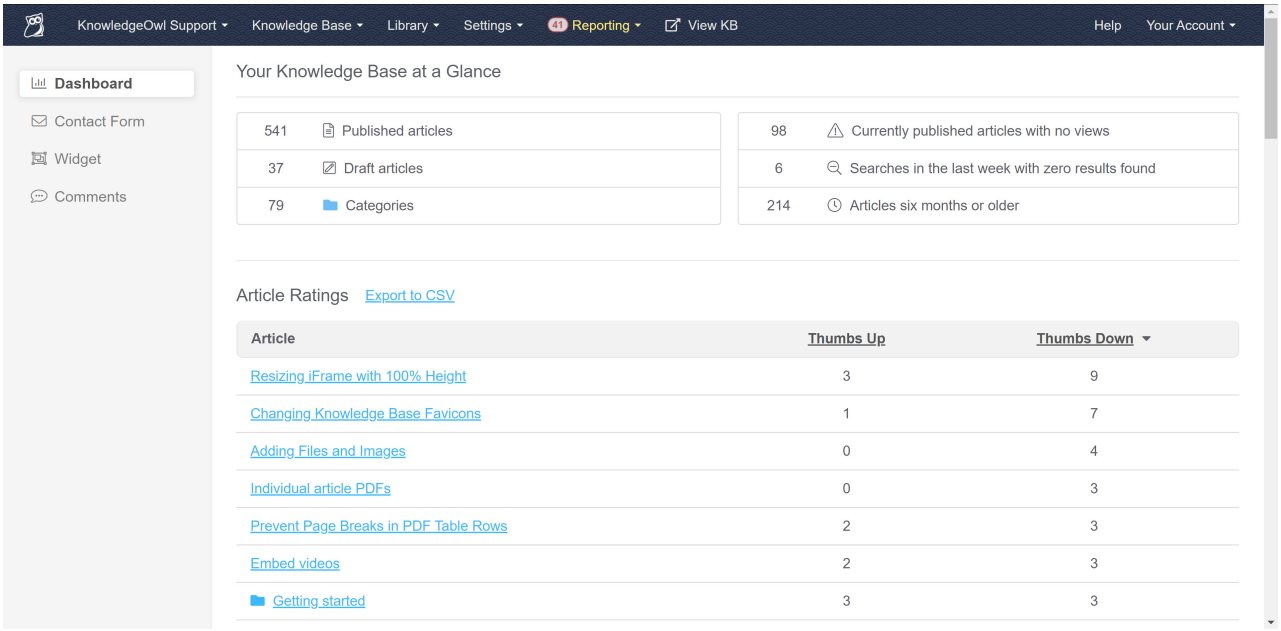
As noted above, search uses several algorithms. Those algorithms are quite complex.

While you can impact your search scores and results by customizing your search weights, optimizing your content, and adding synonyms, it's worth noting that the exact calculations and behavior of the algorithms is not something our support team can fully explain.

Reporting Dashboard Overview

Last Modified on 05/29/2024 5:28 pm EDT

Your Reporting Dashboard gives you a high-level view of your knowledge base, including your article ratings, views, unviewed articles, and searches with no results.



Your Knowledge Base at a Glance

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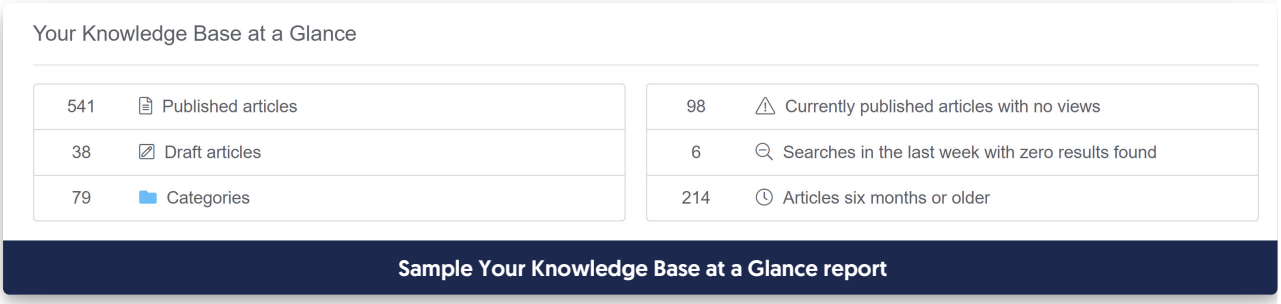


This section will give you some summary statistics on your knowledge base, as well as on the reports contained lower in the dashboard:

- **Published articles** count: links to Manage Articles with the Published status filter selected
- **Draft articles** count: links to Manage Articles with the Draft status filter selected
- **Categories** count: links to the **Articles** page
- **Currently published articles with no views** count: tallies counts from the Published Articles with 0 Views report lower in the dashboard
- **Searches in the last week with zero results found** count: tallies counts from the Searches with no Results report lower in the dashboard
- **Articles six months or older** count: links to Manage Articles with the Out of Date status filter selected

Article Ratings Report

Last Modified on 05/29/2024 5:27 pm EDT

Note: You must have the Ratings feature enabled and the ratings template added to your knowledge base for this report to work.



Sample Article Ratings report

The Article Ratings report displays all articles and categories that have received a rating. It allows for sorting. The layout will look a little different depending on which rating scale you've selected:

- Thumbs Up / Down displays a column for each
- Star Rating displays the average rating out of 5 stars

Articles are displayed with the full title; categories are displayed with a folder to the left of the full title.

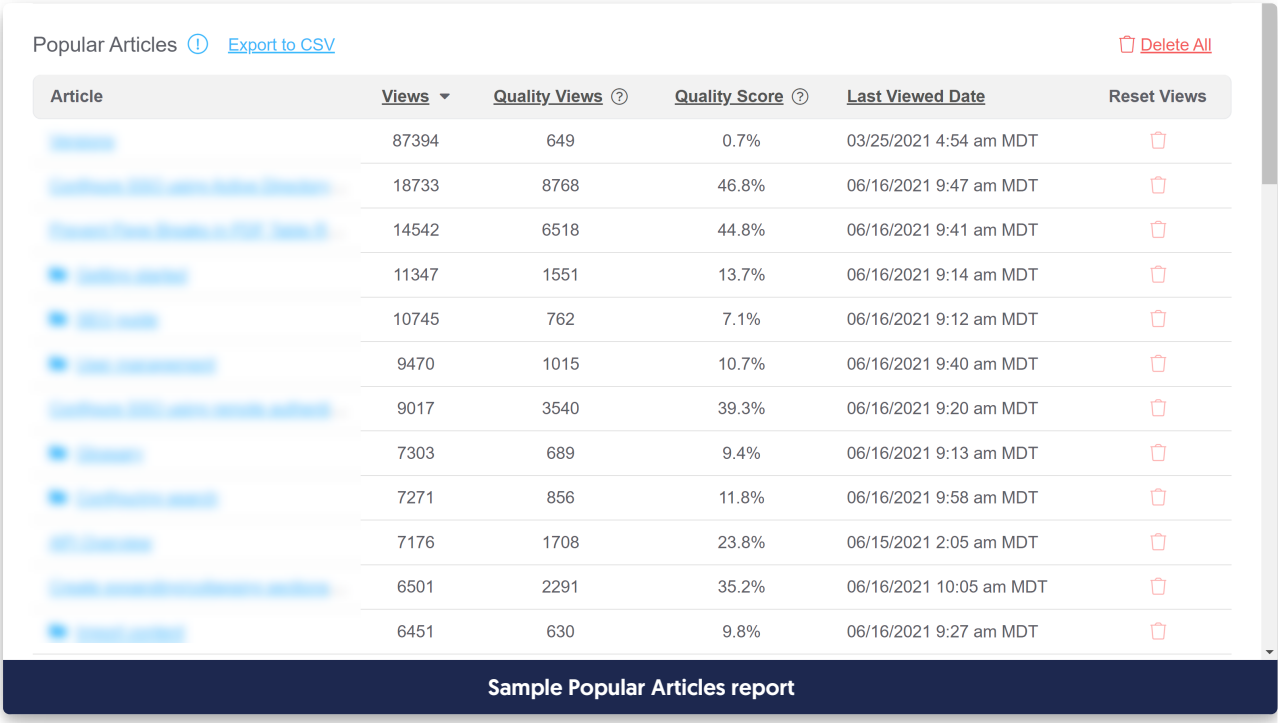
You can reset ratings for individual articles or your entire knowledge base: see Reset article ratings for complete instructions!

Resetting an article's ratings will permanently delete all existing ratings from the dashboard and the Export to CSV export. This action cannot be undone.

The table will show 10 articles at a time; to view the full list at once, use the Export to CSV link next to the Article Ratings header.

Popular Articles Report

Last Modified on 05/29/2024 5:28 pm EDT



Sample Popular Articles report

The Popular Articles report displays all your articles and categories based on number of views and quality views. This can help you determine which articles or categories are getting the most attention from your readers.

- A **View** is recorded each time a visitor accessed this article or category through the knowledge base or one of the Contextual Help Widgets
- A **Quality View** means a visitor hit the page and stayed there for at least two minutes
- The **Quality Score** calculates the percentage of views that were quality views (Quality Views / Views * 100%)
- **Last Viewed Date** shows the last time a reader viewed the article. This time is displayed using the knowledge base's overall time zone set in **Settings > Basic**.

New views, quality views, and last viewed dates can take up to 10 minutes to appear in this report.

Articles are displayed with the full title; categories are displayed with a folder to the left of the full title. The list is sortable by all of the columns listed above. It does not include articles with no views--see the Published Articles with 0 Views report for those.

The table will display 30 articles at a time; to view the full list at once, use the **Export to CSV** link next to the Popular Articles header.

You can also reset views for individual articles or your entire knowledge base.

Quality Views and Quality Score cannot be captured or calculated for URL redirect articles, since those resources typically exist outside of KnowledgeOwl. For these articles, a dash will display in those columns:



No view data of any kind is tracked for URL redirect categories.

Published Articles with 0 Views

Last Modified on 05/29/2024 5:28 pm EDT



Sample Published Articles with 0 Views report

The Published Articles with 0 Views report alerts you to content that is not getting hits. While it might mean the content is not useful to your readers, it could also mean that it is not getting found for some reason. These are articles you might want to investigate and curate a bit. It includes information on:

- **Visibility:** will say "Public" unless the content is restricted to a particular group; then it will list the restricted groups
- **Last Modified:** the timestamp of the last saved edit to this content
- **Date Created:** the date the content was first created. Sometimes, very good content shows up in this list simply because it's brand-new

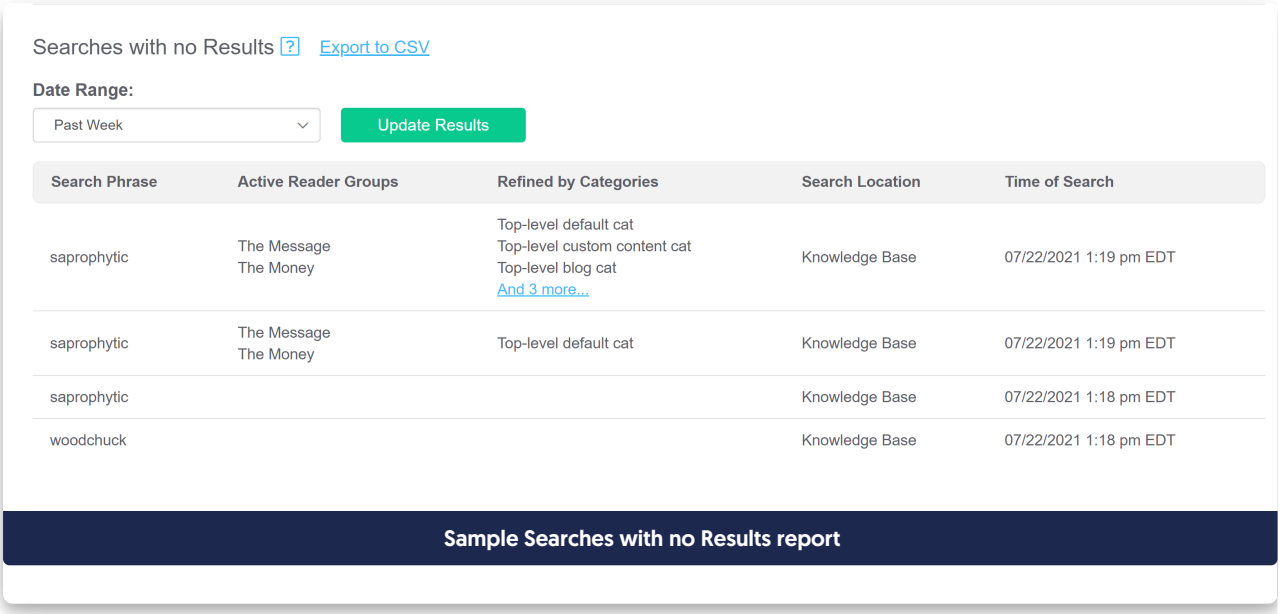
This report is sortable by the Last Modified and Date Created fields.

The table will show 10 articles at a time; to view the full list at once, use the **Export to CSV** link next to the Published Articles with 0 Views header.

This report will include articles that are within topic display categories, even though individual article views within this category type aren't always tracked. (If you check the box to Override Article Links, individual article views won't be tracked.)

Searches with no Results

Last Modified on 05/29/2024 5:28 pm EDT



Sample Searches with no Results report

Each time a reader searches and gets no results found, that search is logged in the Searches with no Results report. The information we capture and display includes:

- **Search Phrase:** The exact phrase the reader used in their search
- **Active Reader Groups:** If the reader is a member of any reader groups, we capture those reader groups here.

  This information is only tracked for searches with no results from 26th July 2021 onward.

  - Readers who have not logged in (e.g. on public knowledge bases) will display no Active Reader Groups.
- **Refined by Categories:** If the option to Filter search by categories has been enabled in your knowledge base, and the reader's search was refined by category, we capture the category or categories the search was refined to here.

  This information is only tracked for searches with no results from 26th July 2021 onward.

  - Searches across the entire knowledge base or in knowledge bases without this setting enabled will display no Refined by Categories.
- **Search Location:** for searches completed within the knowledge base itself, "Knowledge Base" is used. Searches completed from within the Contextual Help Widget (2.0, Modern, or Legacy) will show the

relative URL of the page in your app where the widget search was completed.
- **Time of Search**: The date/timestamp when the search occurred.

You can filter these results by date using the **Date Range** dropdown (be sure to click **Update Results** once you change that selection!). The list is not sortable.

The table will show 10 articles at a time; to view the full list at once, use the **Export to CSV** link next to the Searches with no Results header.

How to use this report

Searches with no Results can be used in a few different ways:

- Phrases or words that appear here which are not in your documentation can be a great way to determine if you need to:
  - Write new content to address this new question or phrase
  - Update existing content with this question or phrase
  - Create synonyms so that this word or phrase surfaces content you already have
- Phrases or words that appear here but are in *some* of your documentation can be a great way to determine if you need to:
  - Create shared content articles to make content appear in additional categories
  - Update reader group restrictions on content or move it to unrestricted categories to make it more available to a wider audience

Reset article views in the Popular Articles report

Last Modified on 05/29/2024 5:28 pm EDT

Once your knowledge base is launched, you might want to reset article views. This might be:

- Once you officially launch your knowledge base, to clear out any viewing data from your testing.
- When you publish a new version, to ensure that all views apply only to the latest version.
- On a set schedule, depending on your quality control processes.

From **Reporting > Dashboard**, you can delete all article views:

- For an individual article
- For all articles, ever



Resetting an article's views will permanently delete all existing view data from the Popular Articles Report and the Export to CSV export. **This action cannot be undone!**

Our default **Editor** role has permission to reset article views. If you're using a custom author role, that role must have the Dashboard Permissions to **Reset individual article view counts** and **Reset all article view counts**, respectively.



We recommend resetting view data at a time when you don't have high usage. If you reset view data while the timer to log a quality view is running, and a reader stays on the page long enough to log a quality view, the initial view they triggered will be deleted but the quality view will still be logged. These orphaned Quality Views can produce a Quality Score over 100.

If you don't mind this slight discrepancy or are comfortable accounting for it, then you can reset whenever you'd like. (You could also reset the same article twice, about 2 minutes apart, to help clean up any orphaned quality views)

Delete an individual article's views

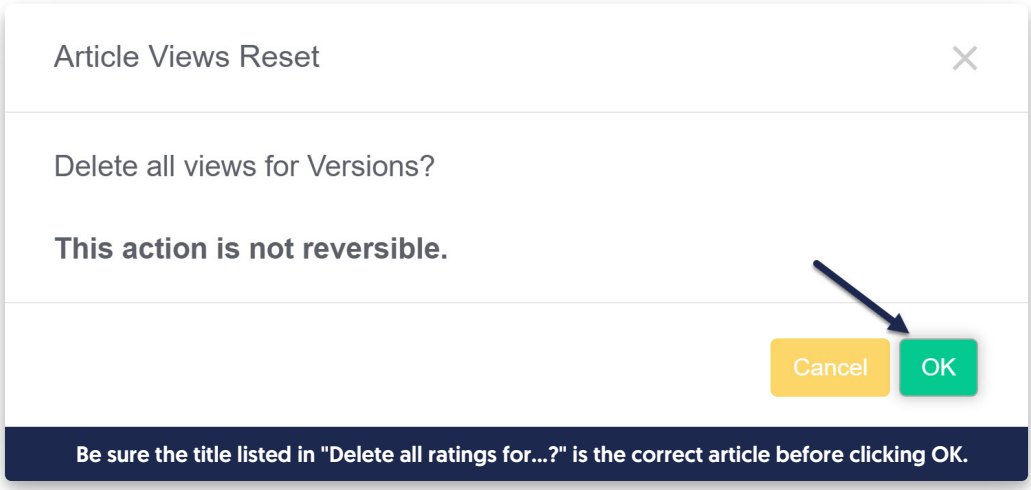
To delete all ratings for an individual article:

1. Go to **Reporting > Dashboard**.
2. In the Popular Articles Report, find the article whose views you'd like to reset.
3. Click the **Reset Views** trashcan in the row of that article.



Click the Reset Views trashcan to delete all views. Here, we're deleting them for our Versions article.

4. This will open a pop-up which will confirm the name of the article whose views you're trying to reset. Be sure the article named there matches what you're looking for. If it does, click **OK**.



Be sure the title listed in "Delete all ratings for...?" is the correct article before clicking OK.

5. The views will be removed from the dashboard as well as the Export to CSV option in the dashboard.

Delete all articles' views

Resetting all articles' views will permanently delete all existing article views from the dashboard and the Export to CSV export. This action cannot be undone!

To delete all ratings for all articles:

1. Go to **Reporting > Dashboard**.
2. In the Popular Articles Report, click the **Delete All** link in the upper right.



Click the Delete All link

3. **This will open a pop-up which will confirm the number of articles whose views you are resetting. If you wish to continue, click OK. This action cannot be undone.**



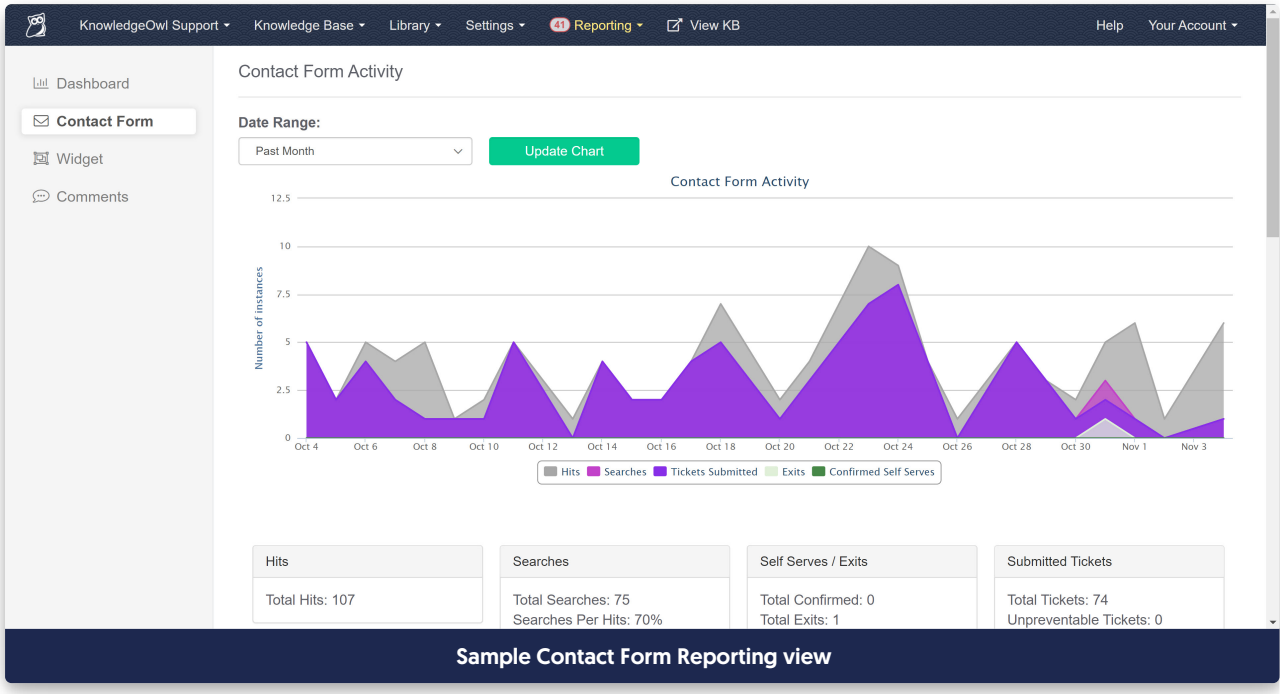
The confirmation pop-up will confirm the total number of articles whose views will be deleted

4. **The ratings will be removed from the dashboard as well as the Export to CSV option in the dashboard.**

Contact form reporting overview

Last Modified on 05/29/2024 5:27 pm EDT

If you're using the Contact Form, all contact form hits, searches, self serves/exits, submitted tickets, and search activity are tracked in Reporting > Contact Form.



Sample Contact Form Reporting view

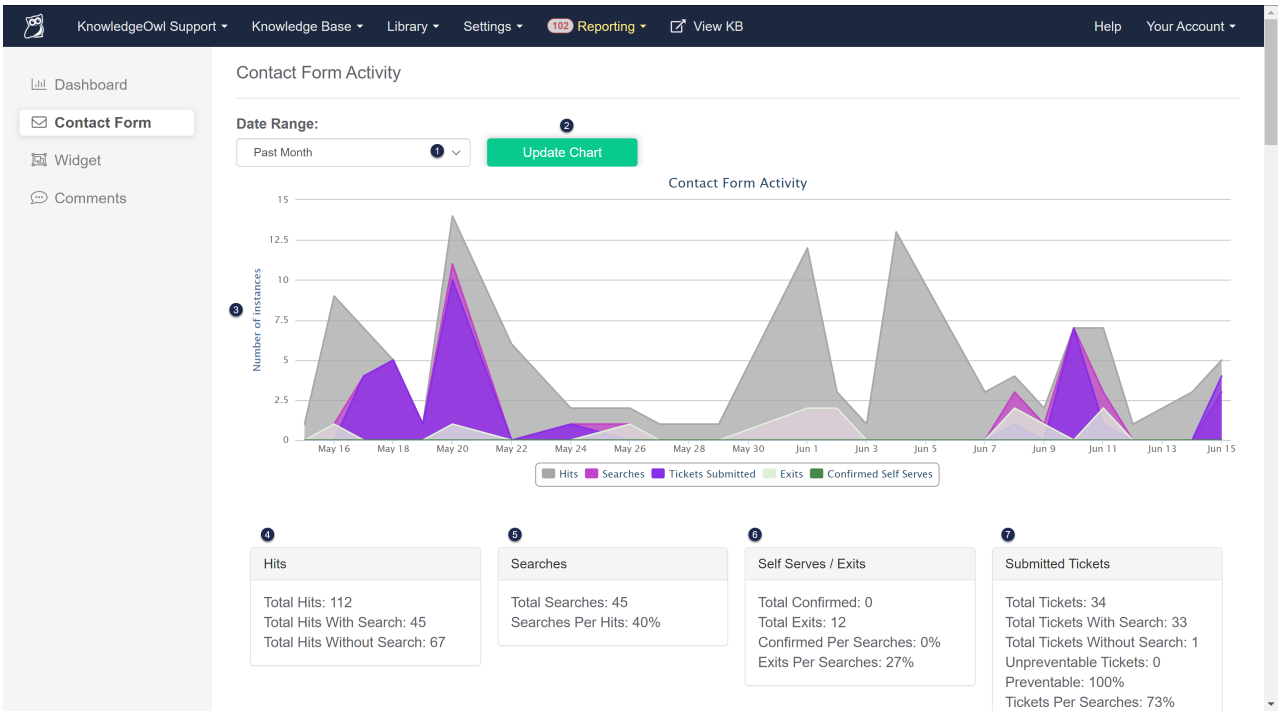
The Report is broken into three major sections:

Contact Form Activity

Last Modified on 05/29/2024 5:27 pm EDT

The Contact Form Activity report is at the top of Reporting > Contact Form.

It lets you know how well your knowledge base is deflecting support emails. Here's a quick guide to help you use this feature:



1. **Use the Date Range dropdown at the top to adjust the time period for the chart and the summary sections below. Options here include:**
    - **Today**
    - **Past week**
    - **Past two weeks**
    - **Past month**
    - **Past two months**
    - **Past six months**
    - **Custom**
2. **Once you've made your Date Range selection, click Update Chart to update the chart and the summary sections below.**

3. The chart displays the number of instances of each section (Hits, Searches, Submitted Tickets, Exits, and Confirmed Self Serves). It adjusts based on the Date Range selected at the top.

4. **Hits**: The number of readers who clicked on your contact form. Basically: the total number of times the contact form was opened.
    - **Total Hits**: All visits to the contact form (with and without search)
    - **Total Hits With Search**: Visits to the contact form that went through the search process (used the /contact-us URL).
    - **Total Hits Without Search**: Visits to the contact form that bypassed the search process (used the /contact-feedback URL).

5. **Searches**: The number of searches performed.
    - **Total Searches**: The total number of searches completed (generally matches Total Hits With Search)
    - **Searches Per Hits**: Total Hits With Search / by Total Hits * 100%.

6. **Self-Serves / Exits**: The number of readers who did not submit a ticket following the initial search.
    - **Self-Services**: After performing the initial search, the number of readers who clicked the button to confirm they found the answer and did not need to submit a ticket. This number is used for Total Confirmed as well as Confirmed Per Searches calculations.
        - Total Confirmed: The number of total confirmed self-services.
        - Confirmed Per Searches: Total Confirmed / Total Searches * 100%
    - **Exits**: The number of readers who didn't confirm they found the answer but exited the form.
        - Total Exits: The number of total exits
        - Exits Per Searches: Total Exits / Total Searches * 100%

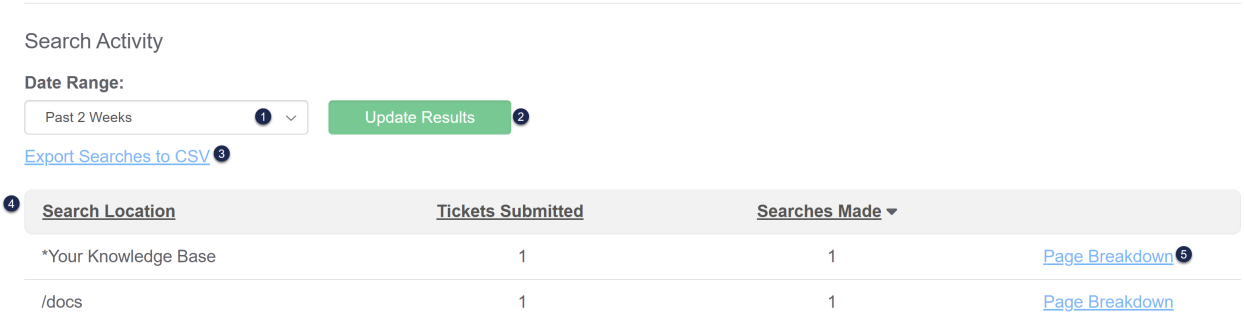
7. **Submitted Tickets**: The number of hits that went on to submit tickets through the contact form.
    - **Total Tickets**: Total number of tickets submitted from all hit types
    - **Total Tickets With Search**: The number of tickets submitted through the full contact form with search (using the /contact-us URL). The total potential number of these tickets is equal to the Total Hits With Search.
    - **Total Tickets Without Search**: The number of tickets submitted that bypassed search (using the /contact-feedback URL). The total potential number of these tickets is equal to the Total Hits Without Search.
    - **Unpreventable Tickets**: Tickets manually marked unpreventable / Total Tickets * 100%
      For tickets to be included in this calculation, you need to manually mark certain searches/tickets as having been unpreventable by using the Search Activity section (see below). KnowledgeOwl automatically marks all tickets as Preventable.

- **Preventable:** Tickets marked as preventable / Total Tickets * 100%
  KnowledgeOwl automatically marks all tickets as preventable, so unless you've been manually marking tickets as unpreventable, this percentage will be 100%.
- **Tickets Per Searches:** Total Tickets with Search / Total Hits With Search * 100%

Search Activity

Last Modified on 05/29/2024 5:28 pm EDT

The Search Activity section lets you see where searches and tickets are coming from, drill into the searches to see more details, and export a CSV containing the details for all searches in the selected Date Range.



1. Use the **Date Range** dropdown at the top to adjust the time period for the table below. Options are the same as the dropdown at the top of the Contact Form Reporting:
    - Today
    - Past week
    - Past two weeks
    - Past month
    - Past two months
    - Past six months
    - Custom
2. Once you've made your Date Range selection, click **Update Results** to update the table.
3. You can **Export Searches to CSV** to view the full details of all searches for the selected Date Range. You'll need to regenerate the export if you Update Results to use a different time period. See Search activity: Export searches to CSV for more info.
4. The table displays the pages where the search was performed from, the total number of searches made, and the number of tickets submitted.
    - ***Your Knowledge Base** are searches performed through the Contact Form directly within your knowledge base (either using /contact-us or /contact-feedback).
    - All other URLs are from searches performed from one of our contextual help widgets: Contextual Help Widget (2.0) or Contextual Help Widget (Modern & Legacy), and show the relative URL of the

page where the embedded widget was opened and the search run.

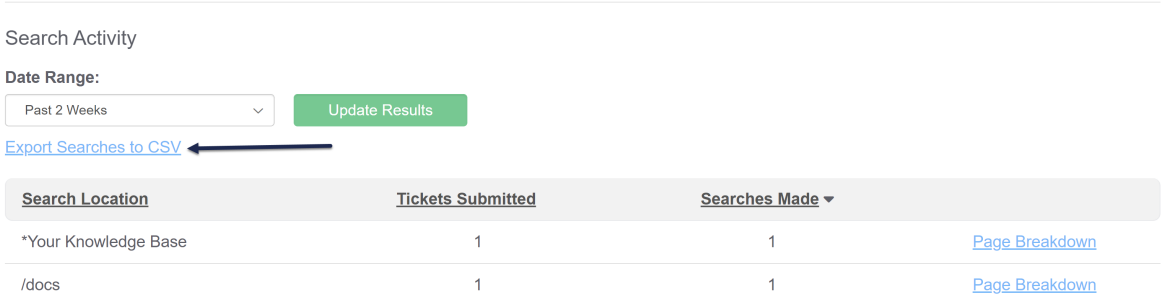
5. Click the Page Breakdown link to view more detailed data for each page.

Search activity: Export searches to CSV

Last Modified on 05/29/2024 5:28 pm EDT

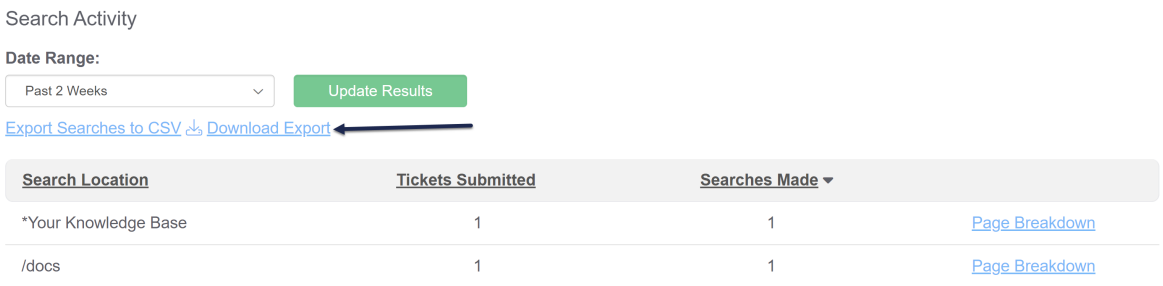
Want to review your search phrases and tickets across search locations? You can download a CSV file containing all Contact Form searches and their resulting info. To do so:

1. In the Search Activity section, select the **Date Range** you'd like to export.
2. Be sure you select the **Update Results** button once you've made your date selection. This ensures that the table display and the CSV export will pull the correct data.
3. Click the **Export Searches to CSV** link just below the Date Range dropdown:



This will generate a CSV file containing all searches in your current Date Range.

4. Once the CSV has generated, you'll see a **Download Export** link. Click that link to download the CSV export.



5. If you **Update Results** to use a different Date Range, you'll need to re-export the searches to CSV and redownload the export.

This export will give you most fields included in the Page Breakdown view:

- **Date:** The date of the search
- **Location:** The location of the search
  - Searches that occur from within the knowledge base itself show "Your Knowledge Base"
  - Searches from within the Contextual Help Widget (2.0) will show the page path where the widget

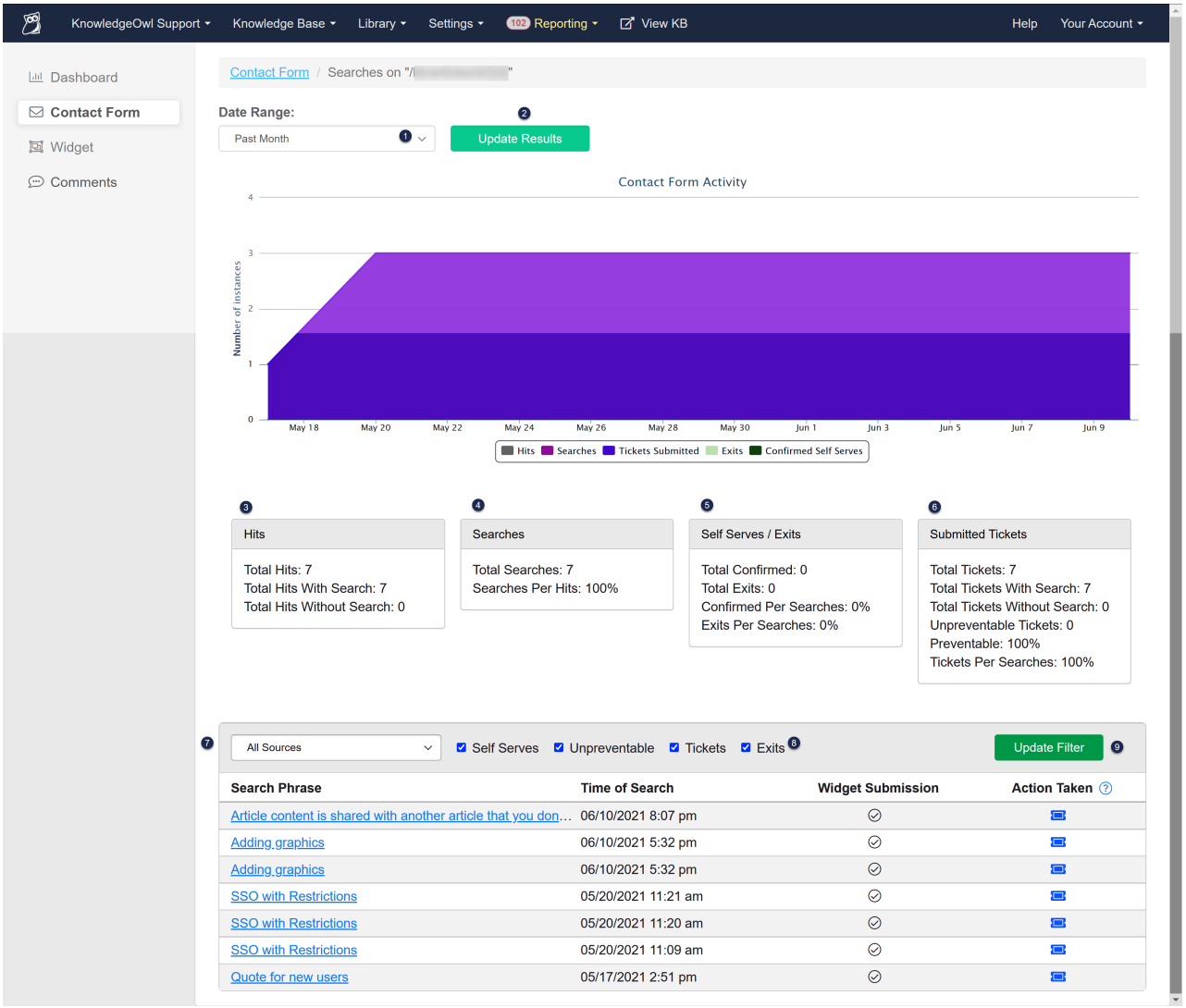
was opened

- **Search Phrase**: The original phrase the requestor searched
- **Action Taken**: The action (if any) taken as a result of the search. Values include:
  - **Confirm self serve**: The search requestor clicked the button to indicate they found what they needed and didn't submit the form.
  - **No ticket created**: The search requestor didn't submit a ticket but also didn't click the button to confirm they found what they needed.
  - **Ticket created**: The search requestor submitted the contact form.
  - **Unpreventable ticket**: You can mark any search as an Unpreventable Ticket in the Page Breakdown section to indicate that there was no way this request could have resulted in a self-serve.
- **Requestor Name**: If a ticket was submitted, the name the requestor provided in the contact form. If no ticket was created, this is left blank.
- **Requestor Email**: If a ticket was submitted, the email address the requestor provided in the contact form. If no ticket was created, this is left blank.
- **Ticket Subject**: If a ticket was submitted, the actual subject that was submitted (which may differ from the original Search Phrase). If no ticket was created, this is left blank.
- **Ticket Body**: If a ticket was submitted, the body of the contact form. If no ticket was created, this is left blank.

Page Breakdown

Last Modified on 05/29/2024 5:28 pm EDT

Once you click Page Breakdown from the Search Activity section, you'll see a breakdown of searches completed on that particular page. For widget contact form searches, this can help identify articles you might want to set up as recommended for the page.



1. **Use the Date Range dropdown at the top to adjust the time period for the table below. These options match the time selectors in the rest of Contact Form Reporting:**
    - **Today**
    - **Past week**
    - **Past two weeks**
    - **Past month**

- Past two months
- Past six months
- Custom

2. Once you've made your Date Range selection, click **Update Results** to update the chart and the summary sections below.
3. **Hits:** The number of readers who clicked on your contact form. Basically: the total number of times the contact form was opened.
    - **Total Hits:** All visits to the contact form (with and without search)
    - **Total Hits With Search:** Visits to the contact form that went through the search process (used the /contact-us URL). For *Your Knowledge Base breakdowns, you may see differing numbers here, but for widget URLs, this number generally matches the Total Hits.
    - **Total Hits Without Search:** Visits to the contact form that bypassed the search process (used the /contact-feedback URL). For *Your Knowledge Base breakdowns, you may see differing numbers here, but for widget URLs, this number is generally 0.
4. **Searches:** The number of searches performed.
    - **Total Searches:** The total number of searches completed (generally matches Total Hits With Search)
    - **Searches Per Hits:** Total Hits With Search / by Total Hits * 100%.
5. **Self-Serves / Exits:** The number of readers who did not submit a ticket following the initial search.
    - **Self-Services:** After performing the initial search, the number of readers who clicked the button to confirm they found the answer and did not need to submit a ticket. This number is used for Total Confirmed as well as Confirmed Per Searches calculations.
        - Total Confirmed: The number of total confirmed self-services.
        - Confirmed Per Searches: Total Confirmed / Total Searches * 100%
    - **Exits:** The number of readers who didn't confirm they found the answer but exited the form.
        - Total Exits: The number of total exits
        - Exits Per Searches: Total Exits / Total Searches * 100%
6. **Submitted Tickets:** The number of hits that went on to submit tickets through the contact form.
    - **Total Tickets:** Total number of tickets submitted from all hit types
    - **Total Tickets With Search:** The number of tickets submitted through the full contact form with search (using the /contact-us URL). The total potential number of these tickets is equal to the Total Hits With Search.
    - **Total Tickets Without Search:** The number of tickets submitted that bypassed search (using the

/contact-feedback URL). The total potential number of these tickets is equal to the Total Hits Without Search.

- **Unpreventable Tickets:** Tickets manually marked unpreventable / Total Tickets * 100%
  For tickets to be included in this calculation, you need to manually mark certain searches/tickets as having been unpreventable by using the Search Activity section (see below). KnowledgeOwl automatically marks all tickets as Preventable.

- **Preventable:** Tickets marked as preventable / Total Tickets * 100%
  KnowledgeOwl automatically marks all tickets as preventable, so unless you've been manually marking tickets as unpreventable, this percentage will be 100%.

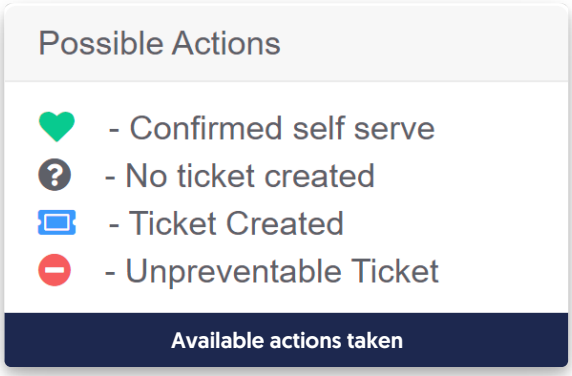
- **Tickets Per Searches:** Total Tickets with Search / Total Hits With Search * 100%

7. The search term section will show the actual terms your readers searched. Contact form searches can be completed from both the full knowledge base (using the contact-us page) or from within the embeddable web widget's Contact Support link, so the **source** dropdown lets you select which source(s) you'd like to use. Options include:
   - All Sources (searches from the knowledge base AND the widget)
   - Knowledge base only
   - Widget only
8. You can filter results to show any combination of Self Serves, Unpreventable, Tickets, and Exits.
9. Once you've changed sources or filters, click the **Update Filter** button.

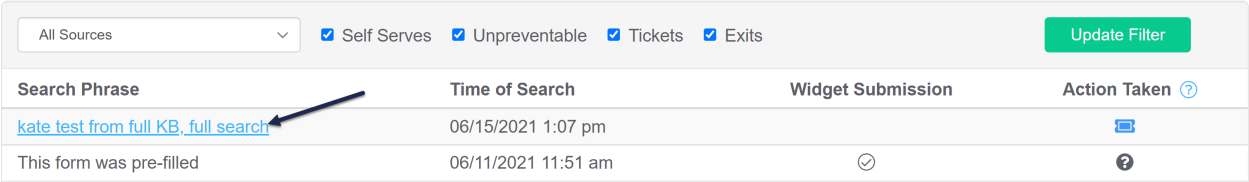
Search phrase lists

The **Search Phrase** results will show:

- The exact **Search Phrase** that was entered
- The **Time of Search** (using the time zone identified for your entire knowledge base in **Settings > Basic**)
- Whether the search was completed in the widget or in the full knowledge base's Contact Form (**Widget Submission**)
- The **Action Taken.** Actions include: Confirmed self serve, No ticket created, Ticket Created, Unpreventable Ticket, with these icons:

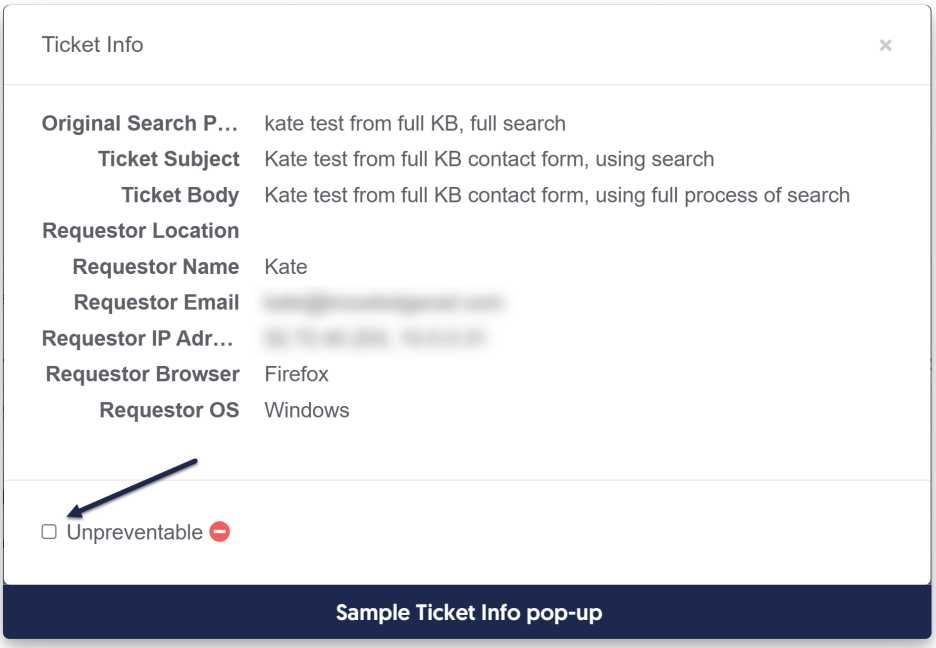


For submitted tickets using search, you can click on any hyperlinked search phrase to view more details for the ticket:



This will open a pop-up where you can view the original search phrase, ticket subject and body, requestor location (if from the widget), name, email, IP address, browser, and OS. These last few options are only populated if you have not checked the "Do not include sender meta data in the email" checkbox in Knowledge Base > Contact Form.

In this ticket info pop-up, you can also check the box in the lower left corner to identify the ticket as "Unpreventable", which will factor into the unpreventable tickets percentage:

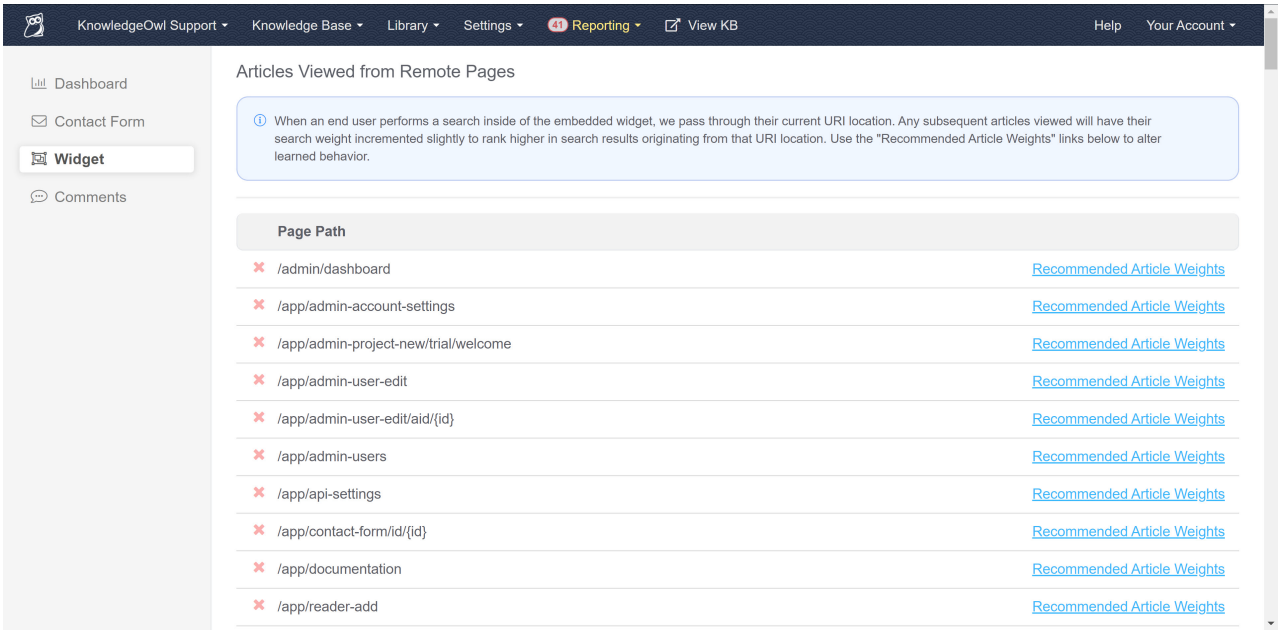


Sample Ticket Info pop-up

Widget reporting overview

Last Modified on 05/29/2024 5:28 pm EDT

If you're using one of our contextual help widgets (Widget 2.0, Modern, or Legacy), you can access Reporting > Widget to see a breakdown of all of the page paths where the widget is recommending articles. You can also tweak the learned bias to adjust the order the recommended articles are displayed in.

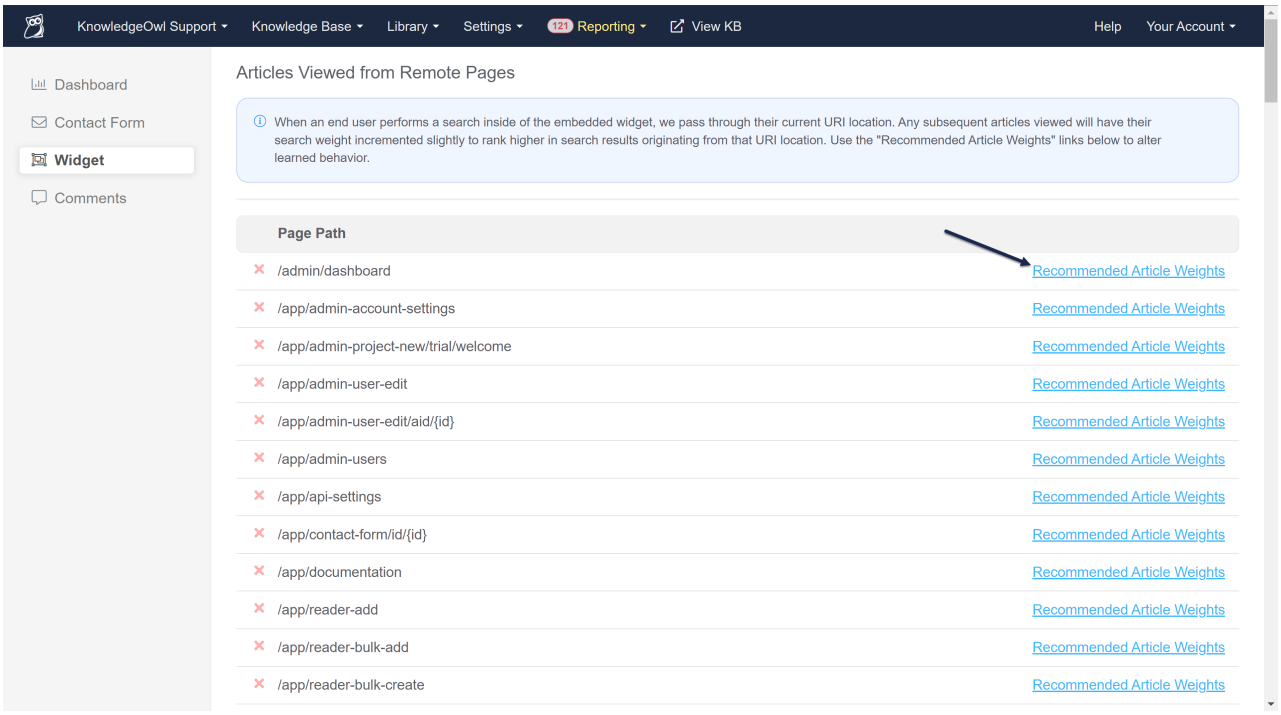


Articles Viewed from Remote Pages

Last Modified on 05/29/2024 5:27 pm EDT

This section displays the Page Paths of all pages where someone opened the widget and/or where recommended articles have been configured.

You can then use the Recommended Article Weights link next to each URL to update the order.



Recommended Article Weights

Last Modified on 05/29/2024 5:28 pm EDT

In the Recommended tab (Widget 2.0) or the Suggested Articles section (Modern and Legacy widgets), the recommended/suggested articles are populated using the Pages to Recommend On setting. But how does the widget determine the order to display those in?

It uses article weights.

What are article weights?

You set which articles appear in the widget for a given page using the Recommend on Pages field.

When the widget loads from a page and pulls the Recommended list, it uses a set of weights to determine the order:

- Anything you've explicitly assigned automatically gets a starting weight of 1.00. Each time it's opened, we increment a "learned bias" field.
- Anything an end-user searched for from this page but wasn't officially recommended also gets added with a small learned bias, and once it earns enough total weight, it is displayed in the recommended articles list. These articles all have a starting weight of 0.
- To determine the display order, the widget adds up the starting weight and the learned bias, and put the highest weights at the top.

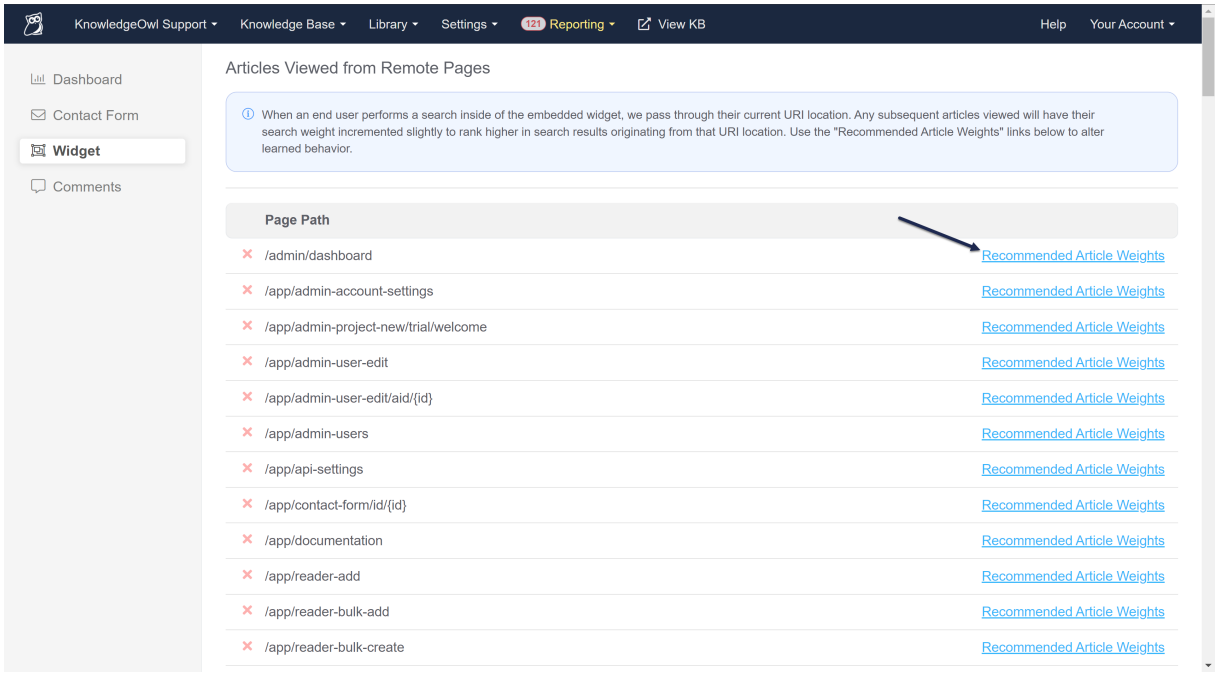
You can toggle the starting weight field between 0 and 1 by adding or removing the URL path from the Recommend On Pages box in individual articles or categories.

You can edit that learned bias field to change the order of articles as they appear in the Recommended tab, using the **Reporting > Widget** pages.

Editing article weights

To change the order of recommended articles:

1. Go to **Reporting > Widget**.
2. Find the URI for the page whose Recommended Articles you'd like to change the order of, and click the **Recommended Article Weights** link for it.



3. This will show you a list of all the articles that the widget is aware of on that page path.

4. The **Starting Weight** is either 0 or 1. All pages set using Pages to Recommend on have a starting weight of 1; all pages added here as a result of end-user search have a starting weight of 0.

5. Edit the **Learned Bias** to move an article in the list. The Total Weight is what determines the order, with the highest weight at the top of the list, and the lowest weight at the bottom.

6. When you're done making changes, scroll to the bottom of the page and click the **Update Bias** button.

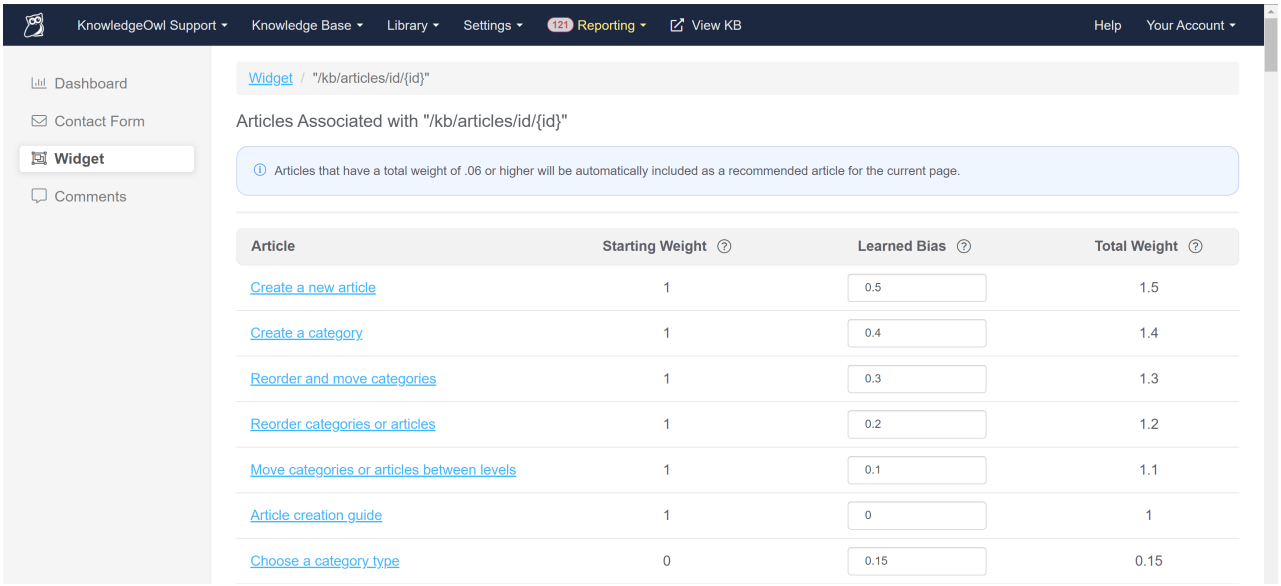
For example, when you first log in to KnowledgeOwl and open a knowledge base, you're taken to the Articles screen. The base URL for this page looks something like this: https://app.knowledgeowl.com/kb/articles/id/55ab55ab55ab55ab55ab

We set up content to be recommended using the URL `/kb/articles/id/{id}`, and that's also the URL that appears in our Widget Reporting.

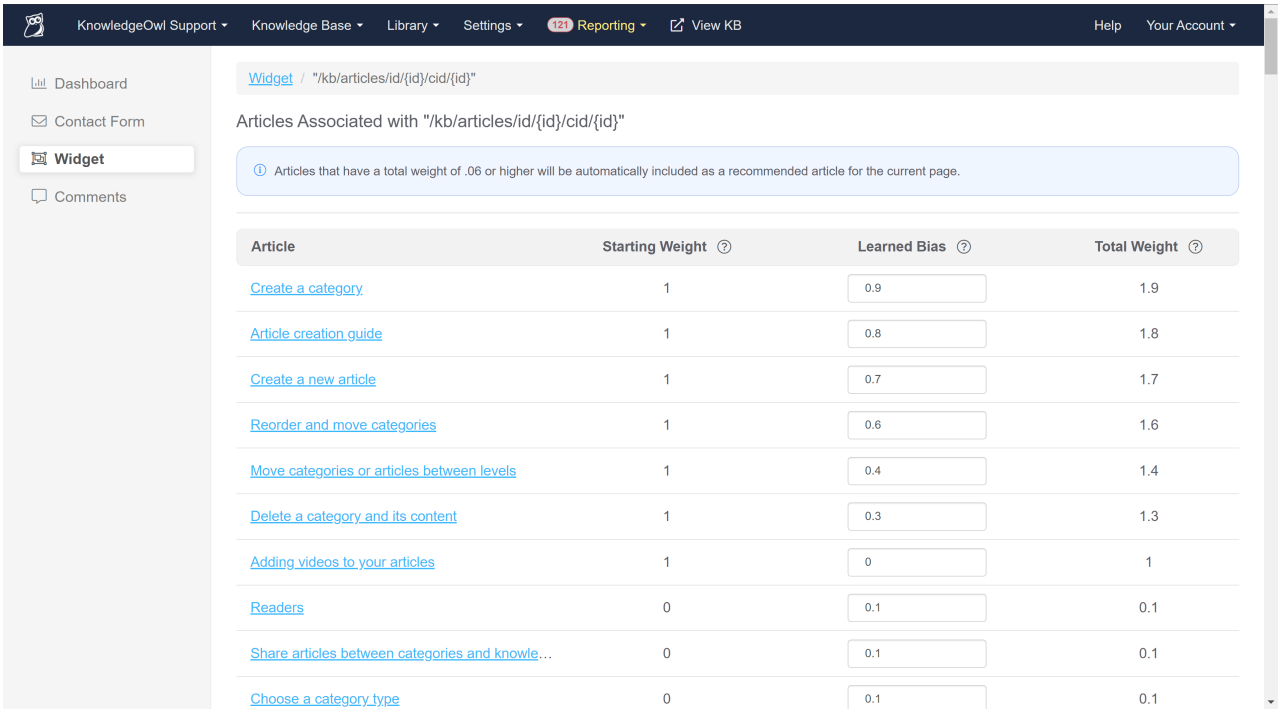
But there are other variations on that page, like if you open an individual category. That looks more like this URL: https://app.knowledgeowl.com/kb/articles/id/55ab55ab55ab55ab55ab/cid/55ab55ab55ab55ab55abc

The relative URL path we use for this to set up our recommendations is `/kb/articles/id/{id}/cid/{id}`

And when I go into my Widget Reporting, I'll see separate entries for each page--and in this case, they have different articles listed with different weights. For example, here's what I see for the main Articles page:



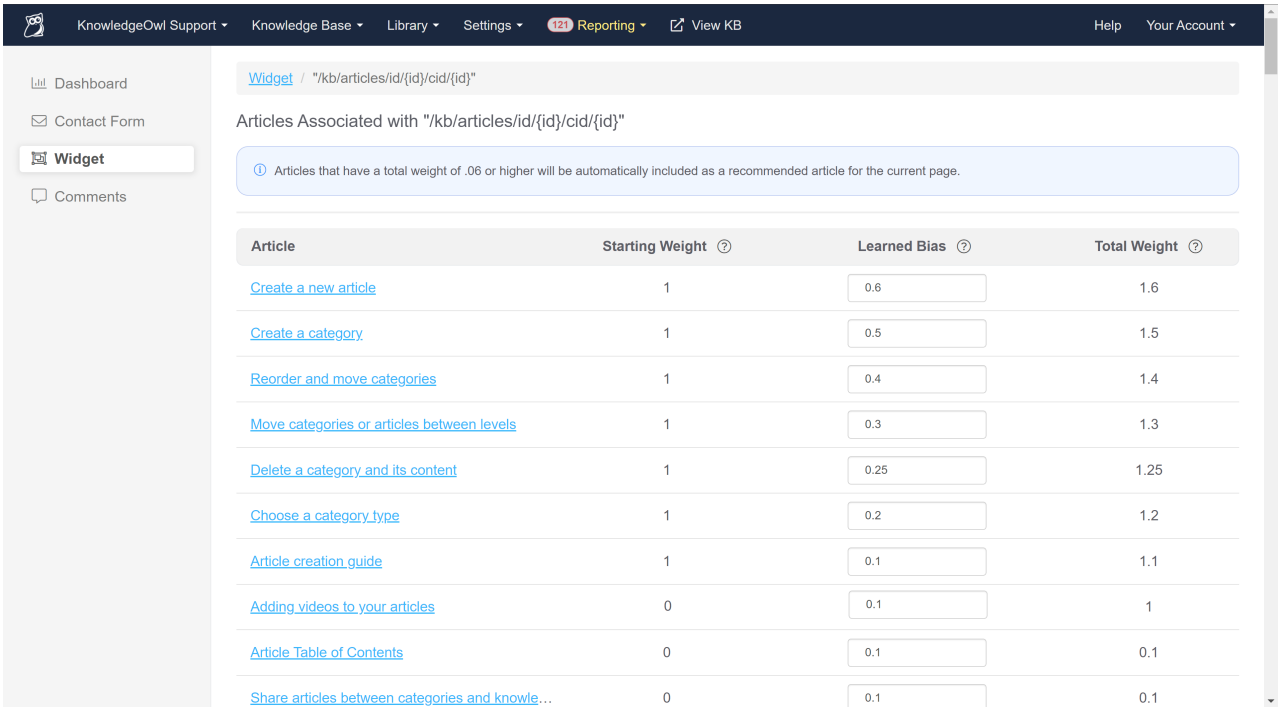
But here's what I see for the Articles page with a category selected:



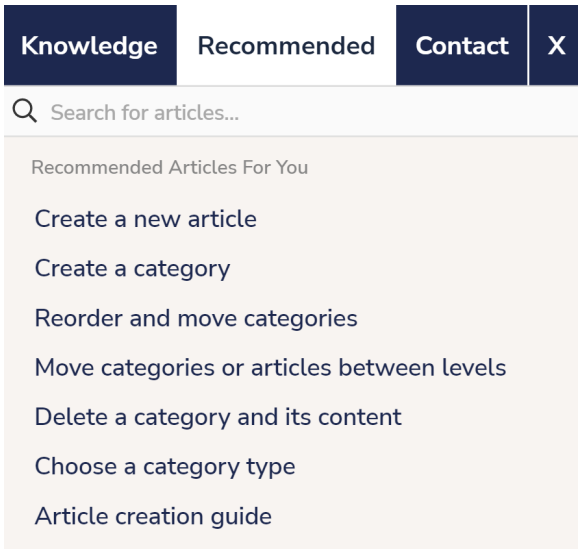
The order of articles is totally different and in some cases, different articles are being shown. To correct this, I can:

- **Add/remove the URL path at the top to individual articles or categories I'd like to be recommended. This will shift the Starting Weight.**
- **Update the Learned Bias for individual articles or categories so that the order more closely matches that of the main Articles view. Remember, a higher weight will move the article higher in the list.**

Once I'm done making edits, my Articles Associated with ... page looks much tidier:



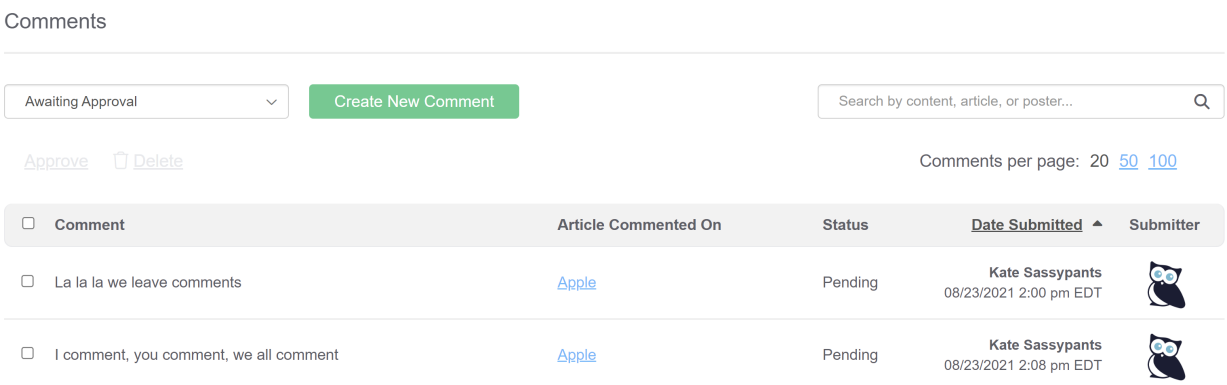
And my end-result in my widget also looks better:



Comments moderation overview

Last Modified on 05/29/2024 5:27 pm EDT

All comments left on your knowledge base will go to Reporting > Comments.



Unless you've checked the box to Auto Approve comments (Settings > Comments), all comments must be moderated.

You can use the dropdown in the upper left to show comments by status:

- **Awaiting Approval:** shows only new comments that need to be approved/deleted
- **Approved:** shows comments that have already been approved
- **Deleted:** shows deleted comments
- **All Comments:** shows all comments, regardless of status

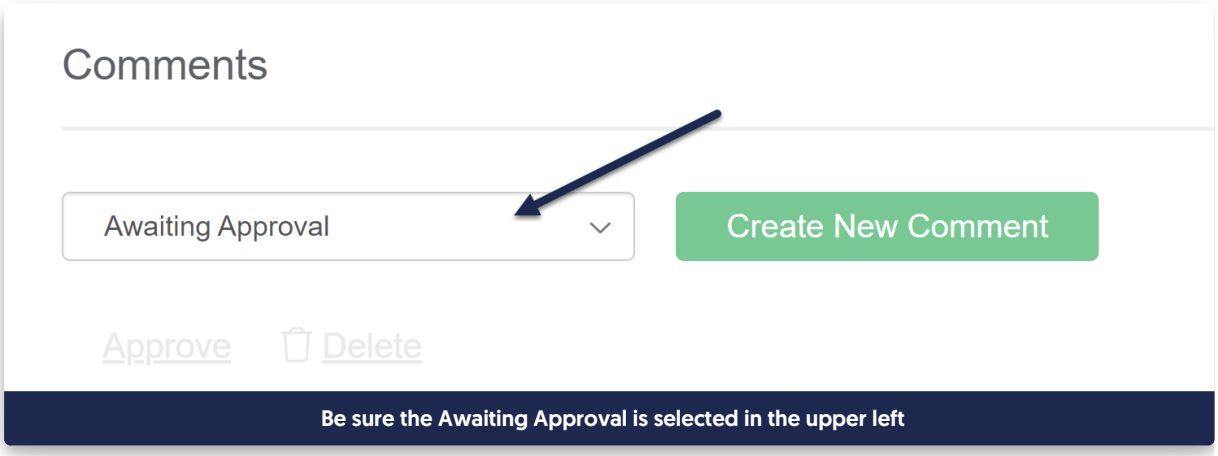
See below for information on approving and deleting comments.

Approve or delete comments

Last Modified on 05/29/2024 5:27 pm EDT

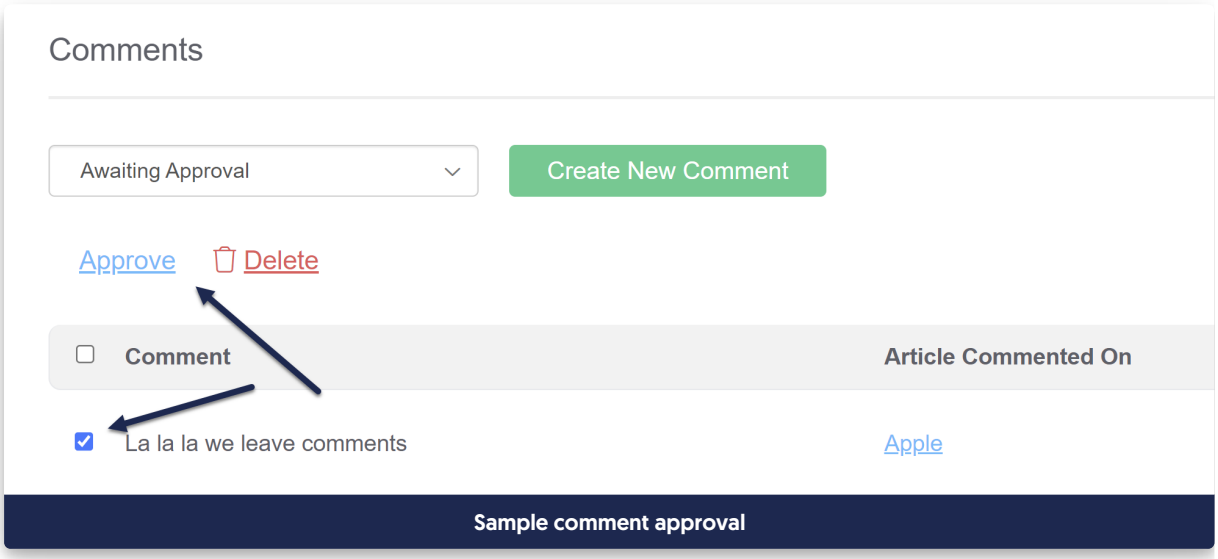
To view, approve, or delete comments submitted to your knowledge base:

1. Go to **Reporting > Comments.**
2. Use the dropdown near the top of the page to filter to the comments **Awaiting Approval.**



Be sure the Awaiting Approval is selected in the upper left

3. Check the boxes to select individual comments and then use the **Approve** or **Delete** links at the top to approve or delete the selected comments.



Sample comment approval

Approved comments will be visible to readers with the appropriate permissions. Deleted comments are stored but not shown.

How do I know when there are comments pending approval?

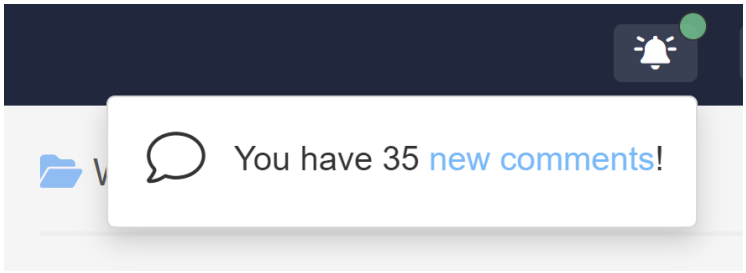
Last Modified on 05/29/2024 5:28 pm EDT

There are two ways you'll know about new comments:

- You'll see a green dot in the notifications area in the KnowledgeOwl banner.



  If you click on the bell icon, a message will tell you how many comments you have, and you can click the **new comments** link to jump directly to **Reporting > Comments**:



- If you've enabled email notifications for comments in **Settings > Comments**, the email address(es) you've added will receive an email based on the **Email frequency** you've selected. See Enable and configure comments for more details.

Only approved comments will show in your knowledge base.

Who can view, approve, and delete comments?

Last Modified on 05/29/2024 5:27 pm EDT

The default Writer and Editor roles have the power to view, approve, and delete comments.

With custom roles, you can get more detailed and allow a role to do one or more of the following:

- Create new comments
- Approve submitted comments
- Delete submitted comments

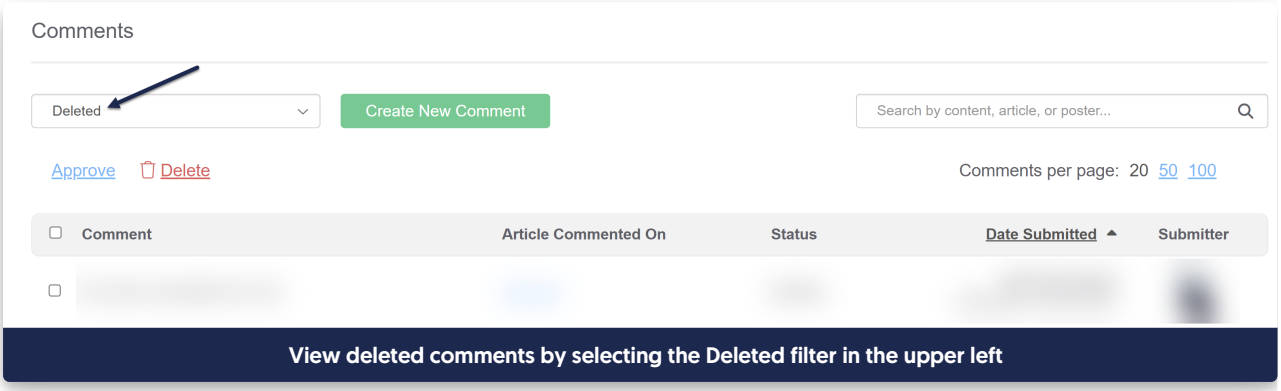
See Available custom role permissions for more options with custom roles.

What happens when I delete a comment?

Last Modified on 05/29/2024 5:28 pm EDT

When a comment is deleted, it gets moved to the Deleted filter in **Reporting > Comments.**

You can view all deleted comments by selected the Deleted filter near the top of the page.



You can still Approve deleted comments to restore and approve them.

If you'd like comments permanently deleted from your account, contact us .

Required Reading reporting overview

Last Modified on 05/29/2024 5:28 pm EDT

Every time a reader checks the box to acknowledge reading a required reading article, we capture that acknowledgement in the Required Reading reporting.

This report is currently available as a CSV download in **Reporting > Required Reading**.

All authors with the default Editor and Writer roles can download this report. Authors with custom roles must have the **View required reading reports** Reporting Permission to view it.

To view the report:

1. Go to **Reporting > Required Reading**.
2. Click the link to **Export report to CSV**.
3. Once the CSV has generated, click the link to **Download Export**.
4. Open the CSV in any program of your choice (Excel, text editor, etc.).

Reading the Required Reading report

Last Modified on 05/29/2024 5:28 pm EDT

The Required Reading report includes the following columns:

- **Record ID:** a randomly-generated ID for this acknowledgement. You can generally ignore this column.
- **Reader ID:** The ID of the author or reader the acknowledgement is tracked for. You can generally ignore this column, too.
- **Reader Username:** The username (usually email address) of the reader or author the acknowledgement is tracked for.
- **Reader Created Date:** The date the reader or author's account was created in KnowledgeOwl.
- **Reader Last Login Date:** The date the reader last logged in. (Note: this will not capture the reader's last activity date if they're using a "Keep me logged in" option.)
- **Is Author Admin:** If this is an author account, does the author have full admin privileges? Shows TRUE if they do; shows FALSE for non-admin authors or for readers.
- **Article ID:** The ID of the article the acknowledgement was tracked for.
- **Article Title:** The title of the article the acknowledgement was tracked for.
- **Article Date Published:** If the article had an explicitly set Published Date, that date is displayed here.
- **Article Tag IDs:** If the article has tags associated with it, this field will show a comma-separated list of the tag's IDs. You can generally ignore this column.
- **Article Tag Names:** If the article has tags associated with it, this field will show a comma-separated list of the tags.
- **Date of Record:** The date and timestamp that the reader checked the box to acknowledge having read the article.
- **Seconds Spent Reading:** For required articles, we try to capture how long the reader spent on the page before checking the box. (We've had some customers appreciate this so they can determine if people seem to be actually reading a document or just scroll to check the box.)

If an article has multiple start dates for being required, a reader may have multiple acknowledgements. You can compare the Date of Record against your Start Dates to confirm if the reader has acknowledged the most recent article.

Set up third-party analytics

Last Modified on 05/29/2024 5:28 pm EDT

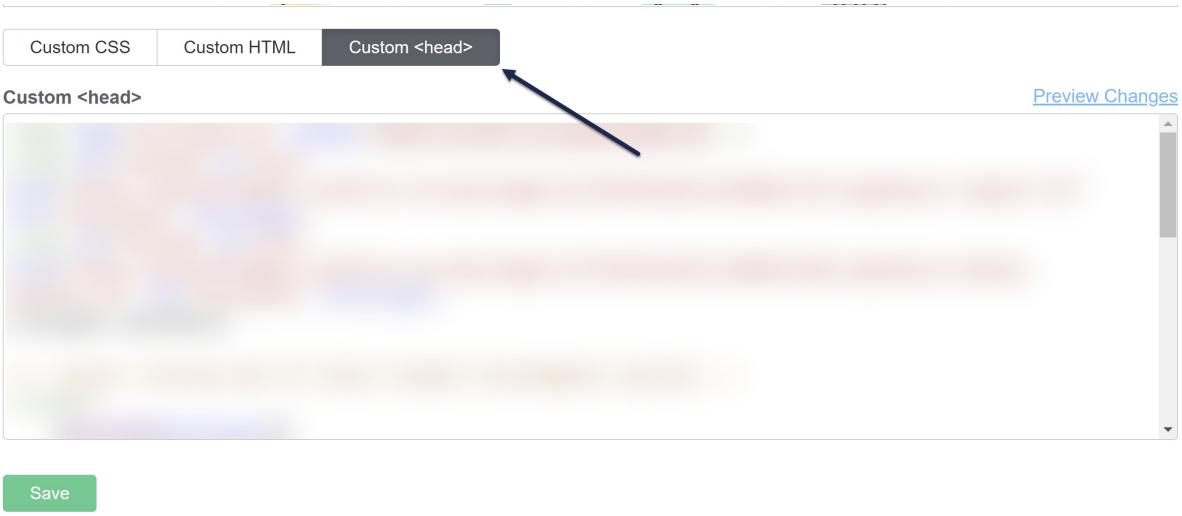
KnowledgeOwl currently doesn't have its own built-in analytics, so many of our customers use a third-party analytics tool, like:

- Google Analytics
- PostHog
- Plausible
- FullStory
- Mixpanel
- Hotjar

Most of these third-party analytics tools require you to embed a tracking code into your knowledge base.

To do that:

1. Go to **Settings > Style**.
2. Below the Preview pane, select the Custom head option.



3. Paste your embed code in here. We recommend adding a comment to indicate the day and person who added it, but that's entirely up to you!
4. Be sure to **Save**.

Once your code is added to the Custom Head, you should be able to start seeing analytics data.

Check with the analytics provider of your choice for additional/more detailed setup instructions.

Search term analytics

Last Modified on 05/29/2024 5:28 pm EDT

There are two ways you might want to capture search-related analytics information:

- **Search engine terms:** If your knowledge base is publicly available, you may want to know what search terms people searched for that brought them into your knowledge base
- **Knowledge base search terms:** You may want to see what terms people are searching for once they're in your knowledge base

Search engine terms

If your knowledge base is publicly available, you may want to know how random people performing searches are finding your knowledge base. The de facto standard for this currently is Google Search Console. You don't need to use Google Analytics to use Google Search Console, which is a tool tied to Google's search engine itself. See their Getting Started guide for more information.

Google has kept fairly tight control over these things, but some third-party analytics tools offer integrations with Google Search Console to pull its data directly into their own platforms (Plausible can, for example). So while you may need to set up Google Search Console to get some of this info, you may not have to use Google's interface or tools directly after you've done that. 😉

If you're already using or already plan to use a third-party analytics tool, check to see if it has a Google Search Console integration.

Knowledge base search terms

Some third-party analytics tools provide analytics and reporting around search terms so you can see what people are searching for in your knowledge base itself.

This may take some research into the tool you're interested in, for example:

- Google Analytics calls this Site Search
- FullStory suggests capturing this in a Top Search Terms metric

See what kind of options your third-party analytics tool offers for this kind of analysis.

When searches are performed in your knowledge base, we adjust the URL to include: `/search?phrase={search phrase}&Search=`

You should be able to target that `search?phrase={search phrase}` portion to get a list of terms.

Reader-specific analytics

Last Modified on 05/29/2024 5:28 pm EDT

For customers with knowledge bases that require login, one of the most common questions we get asked in the analytics and reporting discussion is: can I see what individual readers are doing in my knowledge base?

Currently, KnowledgeOwl doesn't offer this kind of per-reader tracking and reporting. (Though contact us if you're interested in it, since we are tracking interest in this as a feature!)

If you want to do this kind of reporting, we recommend using a third-party analytics tool to do so.

You have a couple options:

1. Use a general-purpose analytics tool.
    a. **Example:** Google Analytics
    b. **Pros:** These tools can handle a lot of analytics and reporting needs. Many are free or quite reasonably priced.
    c. **Cons:** Many of these general analytics tools (Google included) don't want you storing personally identifiable information for individuals within their platforms, so you'll need to pass over the reader's ID from KnowledgeOwl and use that ID to generate reports.
2. Use an analytics tool geared toward individual analytics. These often include session recordings or other metrics.
    a. **Example:** FullStory or Mixpanel
    b. **Pros:** These are tools specifically built to handle reporting and analytics at the individual level, so they have a lot of tooling around it.
    c. **Cons:** These are generally more costly analytics tools and it does mean you'd be capturing information about your readers in a third-party tool, which may require additional disclosures or cookie notifications.

Create a public knowledge base

Last Modified on 08/07/2024 3:09 pm EDT

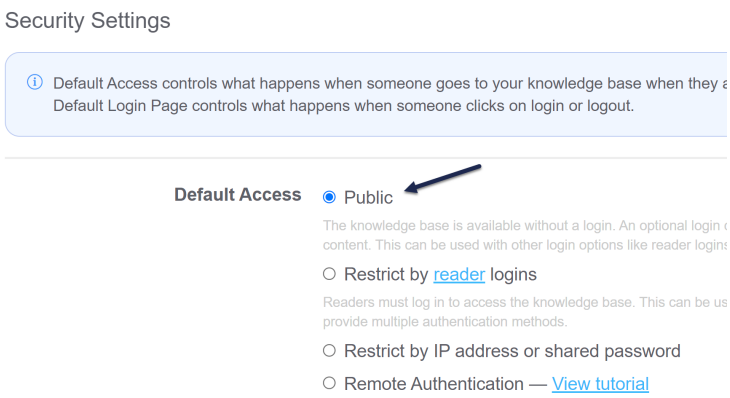
Public knowledge bases are one of the easiest to set up. In this scenario, your knowledge base and all of its content are freely available to anyone on the internet.

Best use cases
Product documentation, Support/troubleshooting documentation, blogs

Worst use cases
Proprietary or confidential information

To make your knowledge base public and available to anyone with the link:

1. Go to **Settings** > **Security**.
2. Set the **Default Access** to Public.



3. **Save** your changes.

If your site is public, it can show up in Google and other search engines.

Learn more about search engine optimization in our SEO guide.

Additional considerations

Review the Spam protection options in KnowledgeOwl to make sure your knowledge base is well-protected for the features you're using!

Create a public knowledge base with some private content

Last Modified on 08/07/2024 3:09 pm EDT

If you want to have some of your knowledge base's content available to everyone, and some restricted to only certain people, you're looking for a mixed public + private knowledge base.



Best use cases
Product documentation, Support/troubleshooting documentation, Multi-department knowledge bases that include public-facing content



Worst use cases
Fully proprietary or confidential information, Fully public information

To make some content private on your public knowledge base, you can create a reader group (or groups), restrict content to the appropriate group, and require readers to log in to get access to the reader group restricted content.

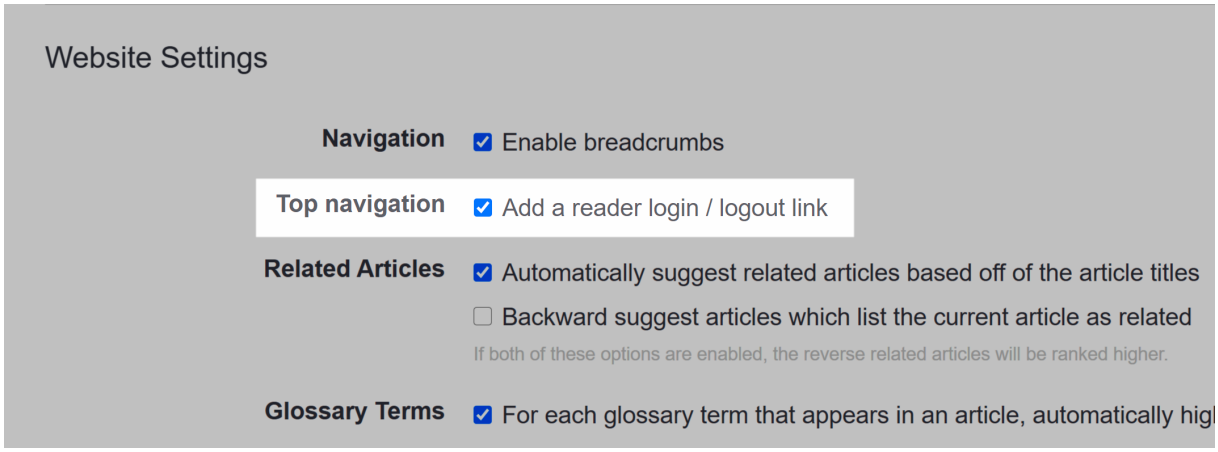
You can log readers into your knowledge base in a few ways:

- Use KnowledgeOwl reader accounts: You can create and maintain reader accounts directly in KnowledgeOwl without having to integrate with any other tools.
- Use some form of Single Sign-On (SSO) to integrate KnowledgeOwl with your existing identity provider so people can use the same login information they use for your other tools.

To log in readers to your site to access the restricted content, add a reader login/logout button to your website or use one of the other authentication methods like single sign-on or remote authentication to automatically authenticate certain readers.

To add a reader login/logout button to your knowledge base:

1. Go to **Settings > Basic**.
2. In the **Website Settings** section, check the **Top navigation** box next to "Add a reader login / logout link".



3. **Save** your changes.
4. Check that the login link appears in your knowledge base by going to **Settings > Style**.
5. Below the preview pane, select **Custom HTML**, then select the dropdown that appears and select **Top Navigation**.
6. The login link will be added wherever the **[template("login")]** appears.

Additional considerations

Review the Spam protection options in KnowledgeOwl to make sure your knowledge base is well-protected for the features you're using!

Create a private knowledge base

Last Modified on 08/07/2024 3:06 pm EDT

You can choose to make your knowledge completely private, meaning that no one will be able to access it without some type of login, password, or shared IP.



Best use cases
Internal documentation of any kind: Employee handbooks, Support/troubleshooting team info, HR policies, Marketing resources, Multi-department knowledge bases



Worst use cases
Any type of documentation you'd want to share publicly

You can make your knowledge base private by choosing one of our available security options:

- **Restrict by reader logins**
  Readers will be required to log in with a username and password created and maintained within KnowledgeOwl. Authors with full account admin access can set up readers, reader groups, and reader settings under your profile > **Readers**. Learn more in our Reader Management guide. Configure this in **Settings > Security**.
- **Restrict by IP or shared password**
  Readers will need to be coming from a specified IP address or enter a shared password to access the site. You can also choose to require both an approved IP address and a password to log in. Configure this in **Settings > Security**.
- **Remote authentication**
  Readers will be required to log in through a 3rd party site, such as your own website or application. You can use this option to automatically log in readers from your software. You'll need to configure remote authentication in **Settings > SSO > Remote Auth**.
- **SAML SSO (single sign-on)**
  Readers will be required to log in through your specified identity provider, such as ADFS, Okta, or G Suites (Google Apps for Work). Configure this in **Settings > SSO > SAML SSO**. Refer to Single sign-on (SSO) for more information.
- **Salesforce SSO (single sign-on)**
  Readers will only be able to log in through your Salesforce account. Configure this in **Settings > SSO > Salesforce**. See our Salesforce SSO Configuration guide.

Additional considerations

By default, all files stored in KnowledgeOwl can be publicly accessed by their URL. For fully private knowledge bases, you may want to lock this down so the files also require logging in to be viewed. Refer to Require login to view files/images for instructions on restricting your files.

Create a private knowledge base with different content for different readers

Last Modified on 08/07/2024 3:00 pm EDT

To restrict content access in a private knowledge base, create reader groups for the different segments of your audience. Restrict your content to the appropriate reader groups. When you create readers in KnowledgeOwl or log them in using single sign-on (SSO) or remote authentication, assign the readers to the appropriate groups.

To learn more about readers, read our Reader Management guide.

Restrict content to logged in readers

Last Modified on 08/07/2024 2:50 pm EDT

You can restrict some content so that it is only visible to specific readers. To do so, create a reader group or groups and then restrict the category or individual articles to that group.

Restrictions can be set:

- At the **category** level: restrictions set in the **Restrict to Groups** section will automatically be inherited by all subcategories and articles in the category.
    - Groups inherited from a category are identified in the **Inherited Restrictions** section of the editor.
    - By default, articles and subcategories are set to "Use Inherited Only" (they will only use the groups they've inherited from the category).
    - You can add additional groups to individual subcategories and articles by using the **Add More Restrictions** checkboxes within those pages.
- At the **article** level: if an article has no inherited restrictions: restrictions set in the **Restrict to Groups** section apply only to the individual article and don't impact other articles or categories in any way.
    - If an article has inherited restrictions: by default it is set to "Use Inherited Only", but you may **Add More Restrictions** to require additional group membership to view the article. **Add More Restrictions** selections don't impact other articles or categories in any way.

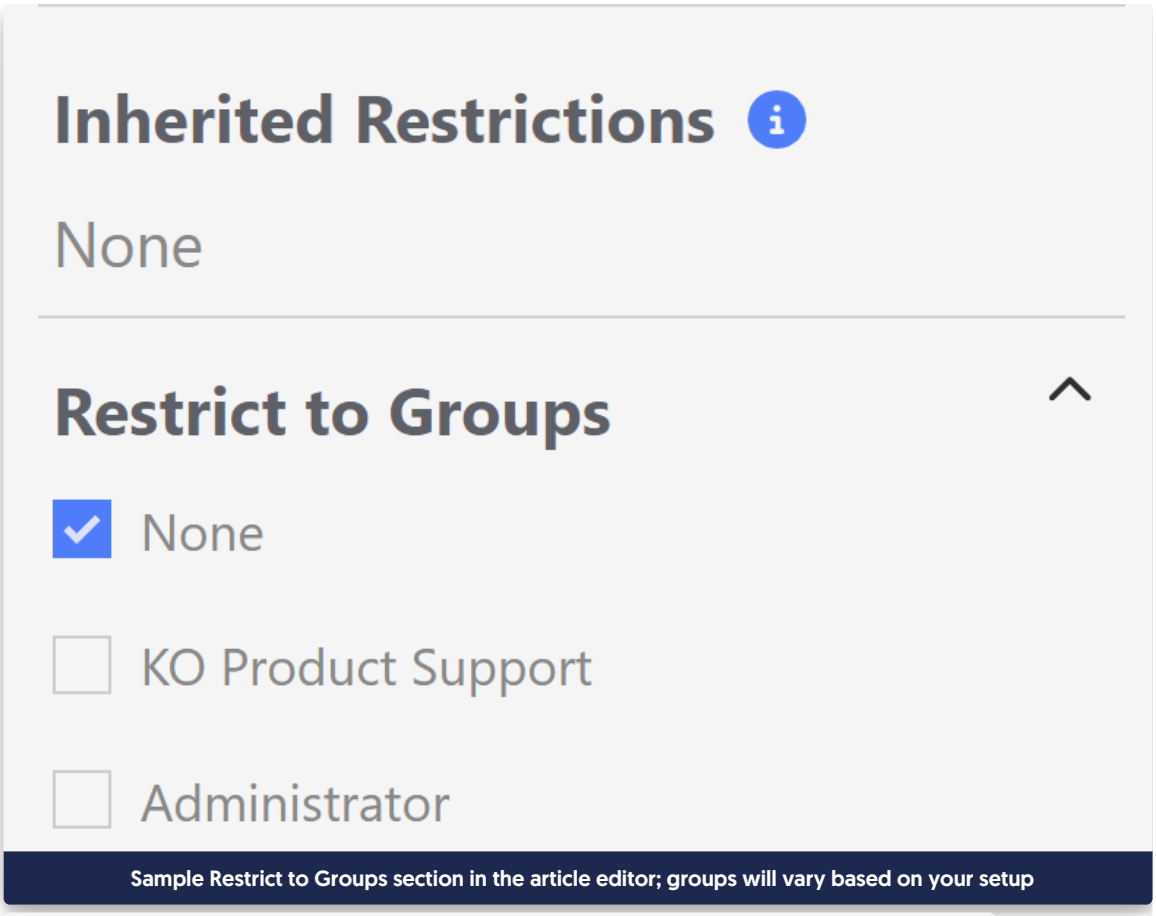
Restrict access based on Reader Groups

1. If you do not have your reader groups set up, you will need to set them up by following these instructions.

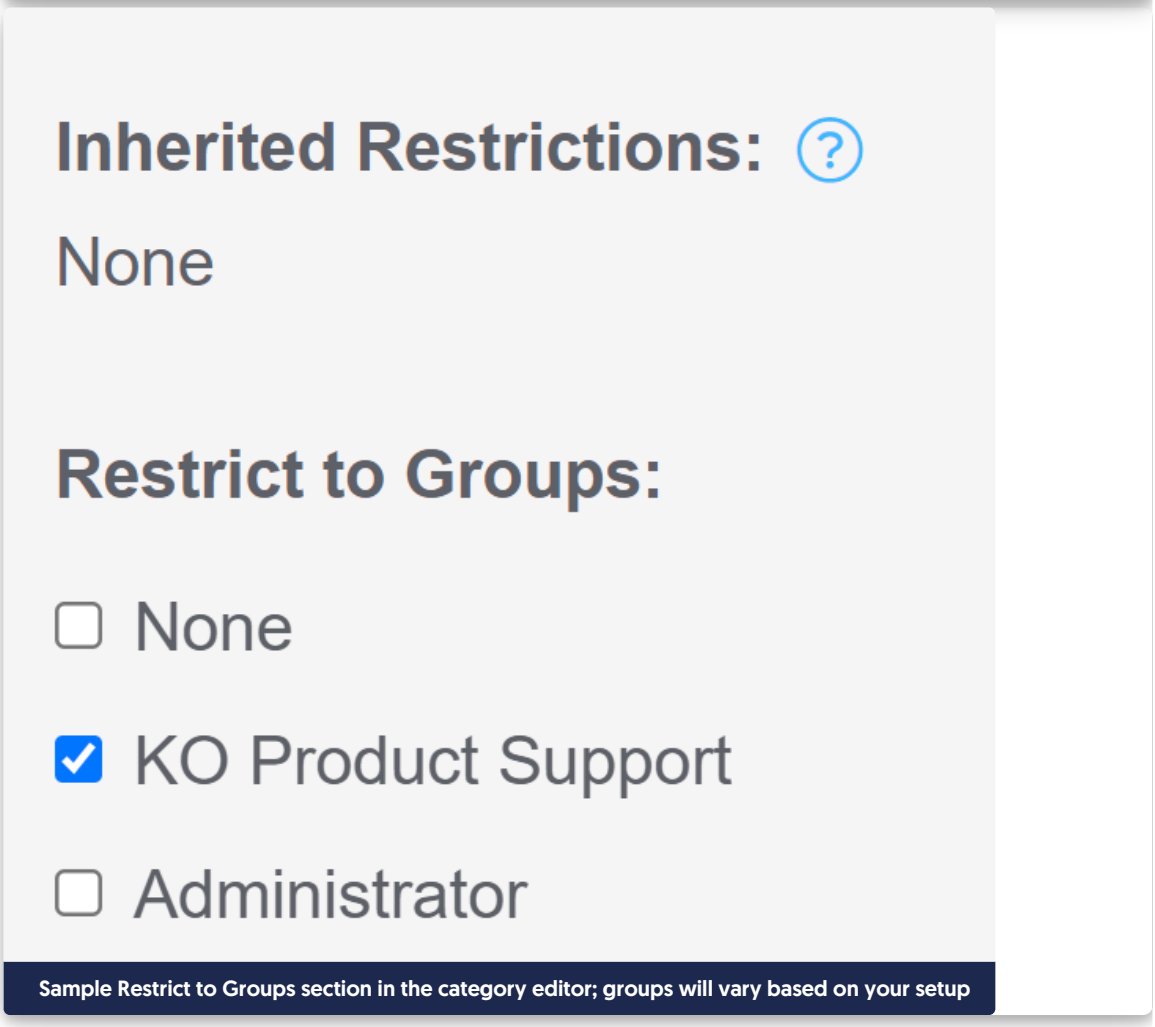
2. Create a new category or article (or edit an existing one by clicking on the wrench icon to the right of any content) inside **Knowledge Base > Articles**.

3. If the category or article has "None" in the **Inherited Restrictions** section of the editor:

    - Use the checkboxes under **Restrict to Groups** in the righthand column to set which groups can see this content. This section looks a little different in the category editor compared to the article editor, but the functionality is the same:

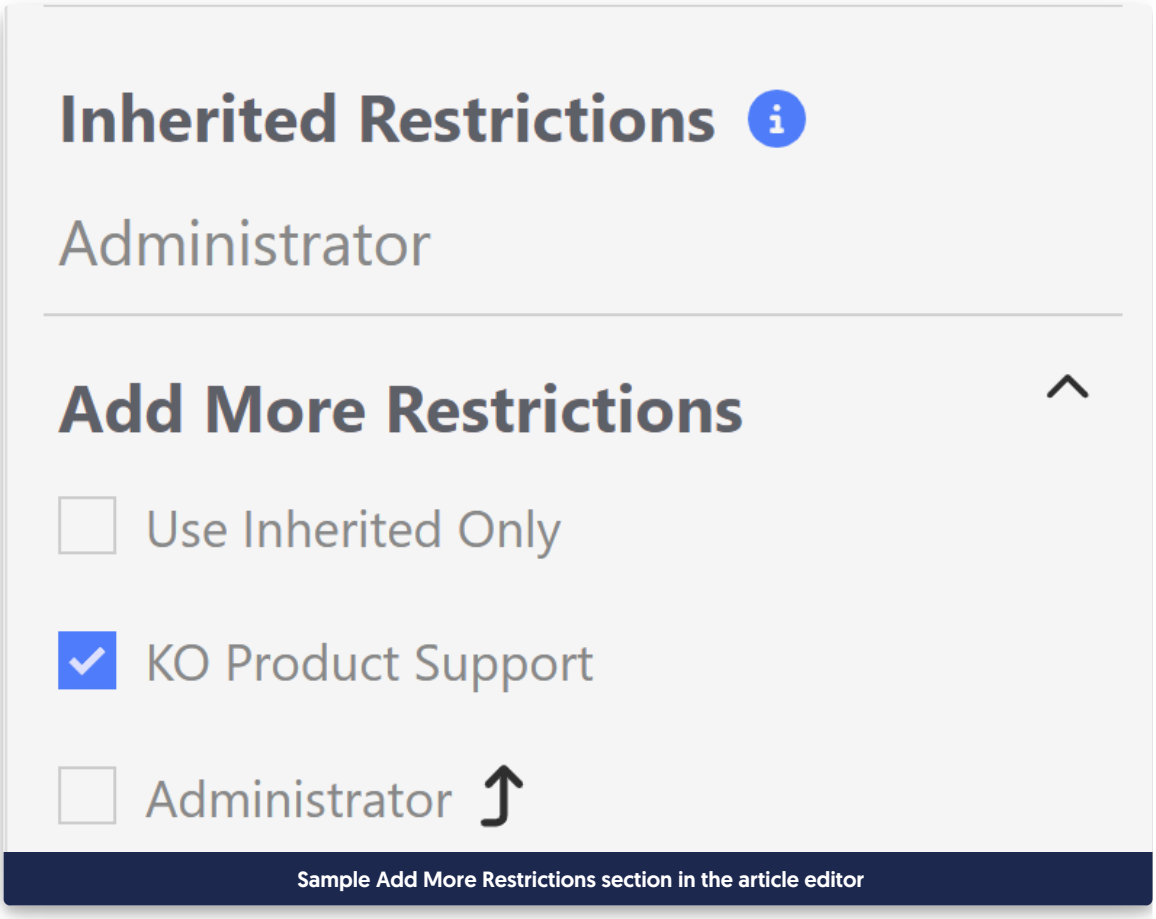


Sample Restrict to Groups section in the article editor; groups will vary based on your setup

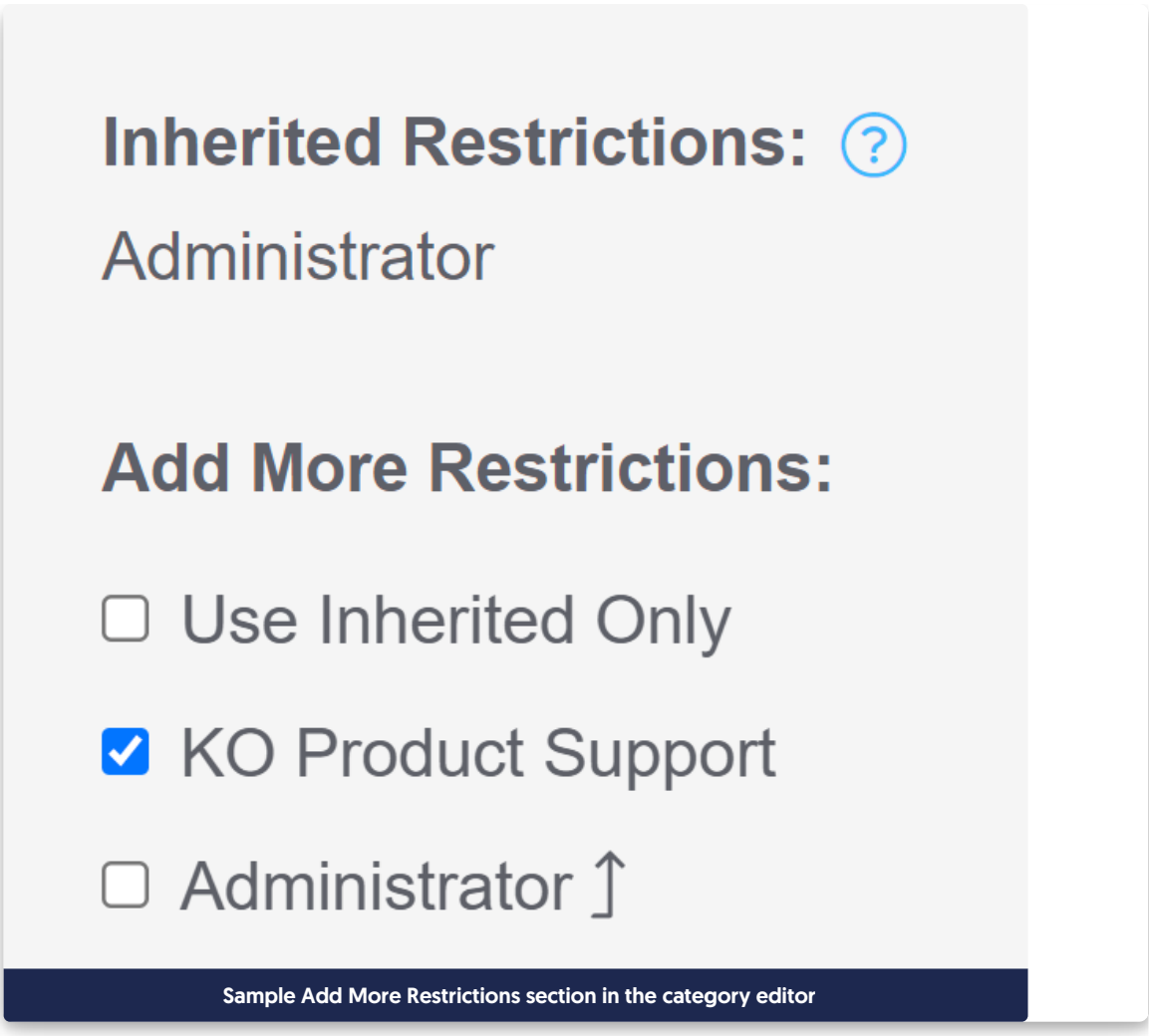


Sample Restrict to Groups section in the category editor; groups will vary based on your setup

4. If the category or article has groups listed in the **Inherited Restrictions** section of the editor:
    - Use the checkboxes to **Add More Restrictions** to the the content. Readers will have to belong to at least one of these additional groups AND at least one of the inherited groups (possibly more, depending on your knowledge base logic; see How do reader groups work? for more info).



Sample Add More Restrictions section in the article editor



Sample Add More Restrictions section in the category editor

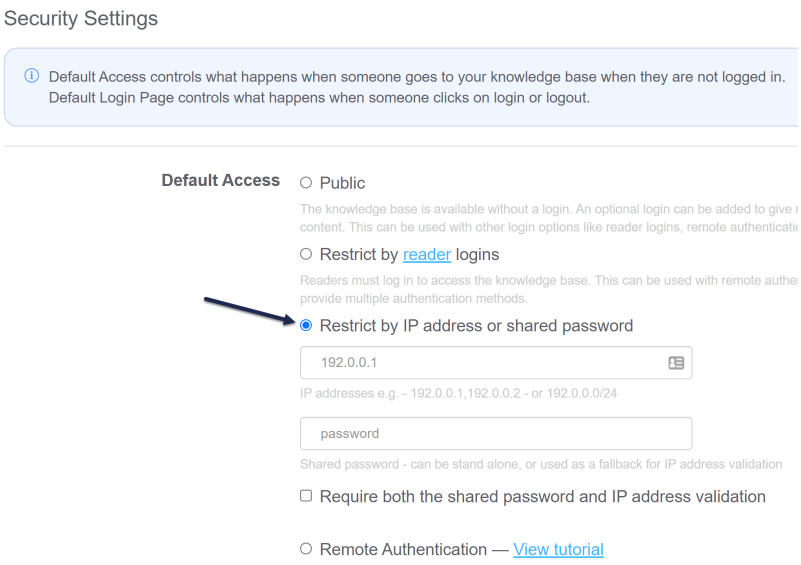
5. Click **Save.**

For more information on how reader group work and what happens when you restrict to multiple reader groups, see How do reader groups work?

Restrict by IP address, shared passwords, reader logins, or a combination

Last Modified on 08/07/2024 3:01 pm EDT

The security settings under the Settings tab are mostly centered around the needs of private or internal knowledge bases. By default, your knowledge base will be visible to the public which means anyone can peruse your content. However, under Settings > Security, you have quite a few options.



When would I use the different types of security?

Restrict by reader logins

Readers offer the most power in terms of authentication to your knowledge base. Essentially a reader is an individual login for each person or group whom you want to give access to your knowledge base. With this setting turned on, a person trying to access your knowledge base will be asked for a username and a password which we can then use to identify who they are. Once they log in, they will remain authenticated for 2 hours and can browse normally. If you select this option, you will need to set up readers under your profile > Readers.

You can also choose remote authentication, Salesforce SSO, or a SAML SSO integration to create readers using existing credentials.

Restrict by IP address

This setting is great for internal office knowledge bases. If you can track down the IP addresses that your office uses, you can paste the comma separated list into the box and ensure that no one trying to access your

knowledge base from outside of your office can get in.



You can also use the /24 subnet mask for a range of IP addresses; at this time, we only support the /24 subnet mask.

Restrict by shared password

This one is great if you need to restrict access to your knowledge base but you aren't sure of your office's IP addresses or if your readers are going to be spread out. Creating a single password that you can give to everyone will allow you to control who gets in but will allow for more flexibility.

IP-based Restriction OR Shared Password

You can also use the shared password setting in combination with the IP protection setting for even more flexibility. What this means is that while someone is in your office, on an approved IP address, they won't have to worry about logging in because they are accessing the knowledge base from an approved IP address. If they work from home one day though, they will be asked for the shared password to log in.

IP-based Restriction AND Shared Password

Need more security? You can select IP-based restriction as well as a shared password for a simplified two-factor authentication.

Convert a private knowledge base to mixed public and private

Last Modified on 08/07/2024 5:08 pm EDT

After having a private knowledge base for a while, you may want to make part of that knowledge base public.

This is a good problem: you're seeing uses for the knowledge base beyond what you originally thought.

If you're in this position, here are the steps we suggest to convert your existing totally-private knowledge base to a mixed public knowledge base.

Identify your current login option(s)

Before you begin, make sure you know all the ways your readers are logging in to your knowledge base, as it impacts the next steps.

There are a few options, and some of these you can use in combination:

- **KnowledgeOwl reader accounts** (KO readers)
  To check if you're using KO readers:
  1. Select your profile name in the upper right, then select **Readers**.
  2. In the dropdown at the top of the page, select **Non-SSO Readers**.
  3. If you have more than a couple test accounts listed here, your knowledge base is using KO Readers.
  4. Refer to KO Readers below for detailed instructions.
- **SAML Single Sign-On** (SAML SSO)
  To check if you're using SAML SSO:
  1. Go to **Settings** > **SSO**.
  2. Is the **Enable SAML SSO** box checked? If so, your knowledge base is using SAML SSO.
  3. Refer to SAML SSO or Remote Auth below for detailed instructions.
- **Salesforce Single Sign-On** (Salesforce SSO)
  To check if you're using Salesforce SSO:
  1. Go to **Settings** > **SSO** and open the **Salesforce SSO** tab.
  2. Is the **Enable Salesforce SSO** box checked? If so, your knowledge base is using Salesforce SSO.



Unsupported
Salesforce SSO can't be used in a mixed public/private knowledge base setup. You'll need to create a second knowledge base for your public content, either with

standalone or synced content.

- **Remote authentication** (remote auth)
  To check if you're using remote auth:
  1. Go to **Settings > SSO** and open the **Remote Auth** tab.
  2. Are the **Remote Login URL** and **Remote Logout URL** populated? If so, you might be using Remote Auth. You can fully confirm this a few ways:
     a. Go to **Settings > Security**. If **Default Access** is set to **Remote Authentication**, you're definitely using remote auth.
     b. In **Settings > Security**, if the **Default Login** page is set to **Remote Auth Login URL**, you're most likely using remote auth.
     c. Check with whomever set up your knowledge base originally to see if they set up a remote auth script.
  3. Refer to SAML SSO or Remote Auth below for detailed instructions.

KO Readers

Follow these steps if your knowledge base is using KnowledgeOwl readers alone or in combination with other auth types:

1. Create a new reader group for your KO readers.
2. Use Edit readers in bulk to assign all your current KO readers to that reader group.
3. For future KO reader accounts:
   a. If all your readers are coming from the same domain (like knowledgeowl.com), use Auto-assign groups by email rules to assign future readers to this group.
   b. If your readers come from different domains, you can either:
      i. Manually assign current and future readers to the group. Edit readers in bulk is a good tool for this.
      ii. Set up one Auto-assign groups by email rules for each domain your readers are coming from.
4. Confirm that all current KO readers are assigned to the new reader group.
5. Once all KO readers are assigned to the new group, you can start restricting categories (or articles) that should only be available to logged in readers.
   a. Readers won't notice anything since you're just updating permissions on the back-end and they will continue to have access to the same content.



Pro tip: Use your content organization
It's easiest if you can organize your content by categories, as then you just need to

update the top-level categories that need to be behind the login.

6. Make sure the theme has the reader login/logout button enabled. Once you make it public, your readers will need a way to log in again, since the login page won't open by default.
7. In **Settings > Security > Reader Options**, if the box next to **Require authentication to view any image or file from your file library** is checked, no images or files will load for public readers. If you plan to have any files displayed in your public content, you must uncheck this box. Refer to rRequiring login to view files/images for more information.
8. In **Settings > Security**, update the **Default Access** to **Public**.



Look before you leap
Once you make this change and save, any content not restricted to your reader group will be publicly available!

9. In **Settings > Security**, update the **Default Login Page** to **Reader Login Page**.
    a. UNLESS you're using KO readers and SAML SSO or Remote Auth, then you may want to use one of the other login pages as the default, or update the reader login page so that it includes a link to your other login page.
10. Be sure to **Save** your changes.
11. Immediately test to make sure everything is working. You can always switch back while troubleshooting! This is a good thing to do during a slow day/time.

SAML SSO or Remote Auth

Follow these steps if your knowledge base is using SAML SSO, Remote Auth, or both:

1. Create a new reader group for people who log in via SSO.
2. Update SSO to automatically assign all readers to the new group.
    a. If you're using SAML SSO, you can do this as a custom attribute map rule. To assign all readers to the same group, use a **Default rule**.
    b. If you're using remote authentication, the remote auth login script will need to be updated to automatically assign all readers to the group.
3. Confirm that all readers are now being given access to the new group.
4. Once all SSO readers are being assigned to the new group, you can start restricting categories (or articles) that should only be available to logged in readers.
    a. Readers won't notice anything since you're just updating permissions on the back-end and they'll continue to have access to the same content.



Pro tip: Use your content organization
It's easiest if you can organize your content by categories, as then you just need to update the top-level categories that need to be behind the login.

5. Make sure the theme has a login/logout button or link somewhere. Once you make it public, people who use SSO will need a way to log in again (it won't go there by default).
6. In **Settings > Security > Reader Options**, if the box next to **Require authentication to view any image or file from your file library** is checked, no images or files will load for public readers. If you plan to have any files displayed in your public content, you must uncheck this box. Refer to rRequiring login to view files/images for more information.
7. In **Settings > Security**, update the **Default Access** to **Public**.



Look before you leap
Once you make this change and save, any content not restricted to your reader group will be publicly available!

8. In **Settings > Security**, update the **Default Login Page**:
    a. If you're using SAML SSO, update it to **SAML Login URL**.
    b. If you're using remote auth, update it to **Remote Auth Login URL**.
    c. If you're using both SAML SSO and remote auth, you'll need to pick one of these as the default, but you may want to update that login page to include a link to the other.
9. Be sure to **Save** your changes.
10. Immediately test to make sure everything is working. You can always switch back while troubleshooting! This is a good thing to do during a slow day/time.

Requiring login to view files/images

Last Modified on 08/07/2024 3:10 pm EDT

The Security Settings for your knowledge base (**Settings > Security** and **Settings > SSO**) determine the general security requirements for readers to access your knowledge base.

The files you upload to your knowledge base--PDFs, Excel sheets, screenshots, Word documents, etc.--do not automatically use this same security.

By default, even if your knowledge base requires login, the files you've uploaded do *not* require login. This is by design so that you can give readers the link to specific documents and they can easily download the file by clicking on that link or URL without having to log in to your knowledge base.

However, you can adjust your security settings so that readers have to be logged in to access files and images stored within your knowledge base. If you make this change, the URLs you'll see will change slightly to a different Cloudfront URL.

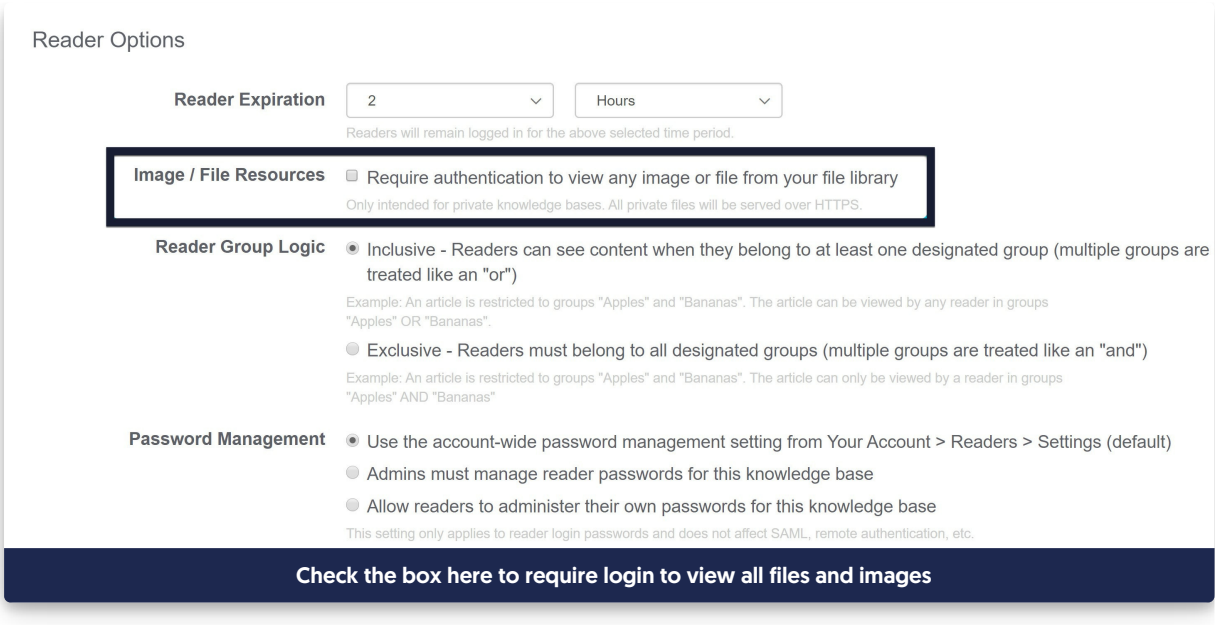
With authentication required, if you share a hyperlink directly to a file stored in KnowledgeOwl, anyone accessing that link will be prompted to log in to the knowledge base using the default authentication method before they'll be able to view the file.



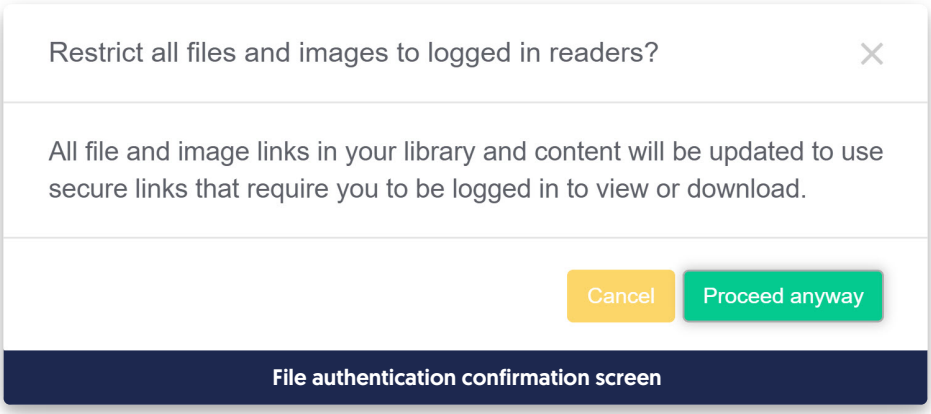
Dashboard display
When this secure file library setting is enabled, you'll no longer see your knowledge base's logo when you're viewing the KnowledgeOwl app dashboard (/app/switch-project). They'll only be hidden from the app switch-project view; they're still shown everywhere else!

If you would like to require that someone must log into your knowledge base before accessing files:

1. Go to **Settings > Security**.
2. In the **Reader Options** section, check the **Image / File Resources** box next to "Require authentication to view any image or file from your file library."



3. **You'll receive a warning asking you if you're sure you want to do this. Click Cancel to keep files unauthenticated; click Proceed anyway to continue with requiring login to view files.**



4. **Be sure to Save your changes.**

Once these changes are saved, we will programmatically update the URL for most of your files referenced in your knowledge base's theme, within articles, and within article thumbnails/banners and category icons. If you are using URL redirect categories or articles pointing to files stored in KnowledgeOwl, you may need to manually update those URLs.

Some customers who require file authentication have noticed some issues with their upper left logos not loading properly on initial page load. If you make this change and notice issues with your logo, please contact us and let us know you're having issues. We can move your logo file to unrestricted storage so it will load faster.

Spam protection

Last Modified on 05/29/2024 5:27 pm EDT

If any part of your knowledge base is publicly available, you're probably interested in preventing spam from reaching you!

There are three main areas you can get spam from:

- The Contact Form: either the full contact form in the live knowledge base, or the Contact tab of Contextual Help Widget (2.0).
- If Comments are enabled and you are not checking the box to "Only allow logged in readers and authors to leave comments". See Comment restrictions and permissions.
- Bogus subscription sign-ups: only generally possible if public subscriptions have been enabled

KnowledgeOwl provides two ways for you to prevent spam:

ReCAPTCHA

reCAPTCHA is a free service from Google that helps prevent spam activity in your knowledge base.

It's designed to verify that someone signing up for a subscription is a real person and not a bot. A "CAPTCHA" is a simple test--usually a task that is very easy for a human to perform, but hard for bots and other malicious software to figure out. There are two versions of reCAPTCHA:

- v2: Verify requests with a challenge. Example: checking a box next to "I am not a robot."
- v3: Verify requests with a score. Example: click on all the images that have cars in them.

KnowledgeOwl currently supports specific versions in specific places:

- v2: Supported in the full knowledge base; not supported in Contextual Help Widget (2.0). For these reCAPTCHAs, configurations with "I am not a robot" reCAPTCHAs, and you can see one in action if you try to subscribe to a category in this knowledge base.
- v3: Supported in Contextual Help Widget (2.0); not supported in the full knowledge base.

Only v2 reCAPTCHAs will work properly in your main knowledge base. We've tested our configurations with "I am not a robot" reCAPTCHAs, and you can see one in action if you try to subscribe to a category in this knowledge base!

See Add reCAPTCHA for more information on setting up reCAPTCHA.

Pros

- Free service provided by Google
- Once set up, you don't have to think about it
- Most readers are familiar with reCAPTCHA processes, since they're used so many places
- Generally very effective at blocking spambot traffic

Cons

- Requires you to set up one or more site keys and secrets with Google and get them configured

- People can get caught in a reCAPTCHA loop, depending on the type of reCAPTCHA you've selected--this is why we recommend using the checkbox version rather than the "select all pictures of xx" version
- reCAPTCHA is a Google-supported tool, and particularly if you have GDPR requirements or concerns, reCAPTCHA might not be a viable option

Honeypot

Honeypots are an alternative way to handle spam protection. Honeypots are used in a variety of ways, but the basic gist is that they create something that is enticing and somewhat irresistible to bad actors.

For things like contact forms, this means that instead of making all readers complete an action or test before they can submit a form, a honeypot might include some hidden form fields that no human will see. Spambots do see them and generally fill them out. Submissions with these fields completed are ignored.

Honeypots might also include time or repeat submission restrictions, where they'll flag repeated submissions from the same reader within xx seconds of each other, or flag submissions that took fewer than xx seconds to fill out.

Our built-in honeypot function works similarly to these options (though for security reasons, we can't tell you the full details!).

Pros

- Simple setup: check a box, Save, and you're done; no registration or site keys to configure
- Better end-user experience for your average human reader (no tests/tasks to complete)

Cons

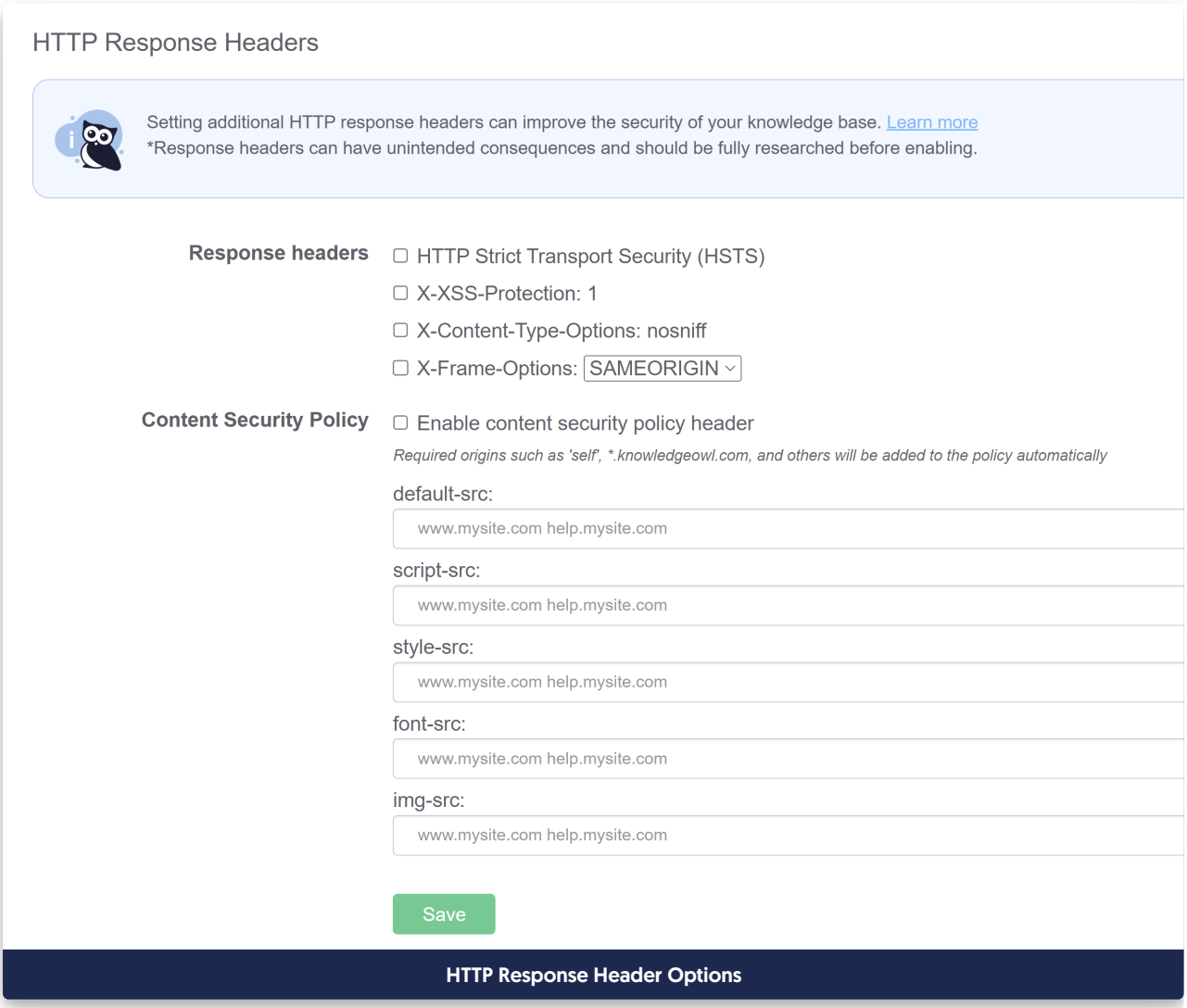
- If someone seriously wants to attack and spam you, they can figure a honeypot out and bypass it, so they aren't as effective as reCAPTCHA when it comes to dedicated malicious attackers

HTTP response headers

Last Modified on 07/17/2024 1:25 pm EDT

In order to improve the security of your knowledge base, you can enable some additional HTTP response headers and/or Content Security Policies that will be returned by our servers that give additional instructions to the reader's browser. The effects of these headers vary and should only be enabled by someone with a clear understanding of what they do.

You can find these settings under Settings > Security in the HTTP Response Headers section. Below we'll provide a brief high level description of what each of these headers is used for.



HTTP Strict Transport Security (HSTS)

The HTTP Strict Transport Security header informs the browser that it should never load a site using HTTP and should automatically convert all attempts to access the site using HTTP to HTTPS requests instead. See MDN Web Docs for more info.

X-XSS-Protection: 1

Enables XSS filtering (usually the default in browsers). If a cross-site scripting attack is detected, the browser will sanitize the page (remove the unsafe parts). See MDN Web Docs for more info.

X-Content-Type-Options: nosniff

The X-Content-Type-Options response HTTP header is a marker used by the server to indicate that the MIME types advertised in the Content-Type headers should not be changed and be followed. This is a way to opt out of MIME type sniffing, or, in other words, to say that the MIME types are deliberately configured. See MDN Web Docs for more info.

X-Frame-Options: SAMEORIGIN/DENY

The X-Frame-Options HTTP response header can be used to indicate whether or not a browser should be allowed to render a page in an `<iframe>`, `<embed>`, or `<object>`. Sites can use this to avoid click-jacking attacks, by ensuring that their content is not embedded into other sites. See MDN Web Docs for more info.

Content Security Policy

Content Security Policy (CSP) is an added layer of security that helps to detect and mitigate certain types of attacks, including Cross Site Scripting (XSS) and data injection attacks. These attacks are used for everything from data theft to site defacement to distribution of malware. If you're pulling external resources, the CSP determines which domains are allowed to do certain things, such as run scripts, load resources, and so on. See MDN Web Docs for more info.

You can include domains with and without the scheme (such as https:, wss:, etc.), 'unsafe-eval', and domains with wildcards (*) for any of the CSP directives here.



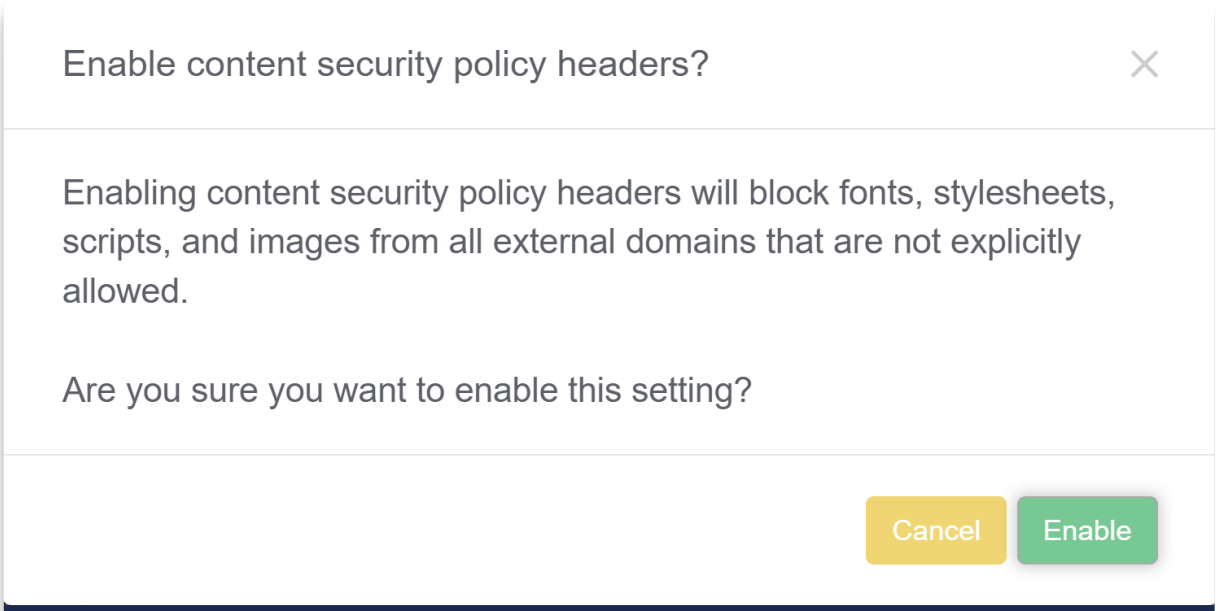
Proceed with caution
These options have the most potential to cause unintended consequences for your knowledge base. If you are referencing any remote JavaScript, fonts, images/files, or CSS, make sure you add the remote domains into this policy or they'll be blocked.

Defining the script-src or default-src policy may also prevent the KnowledgeOwl Modern Widget from rendering (Widget 2.0 will not be affected).

To enable CSP:

We recommend that you:

1. First, review the individual directives below and add appropriate domains/settings to individual CSP directives (such as default-src, script-src, etc.). See the sections below for more information on each directive.
2. Once you've reviewed all directives and added appropriate domains and resources, check the box to **Enable content security policy header**.
3. You'll be presented with a pop-up confirming you're ready to enable. You must select **Enable** to proceed.



Enable content security policy headers confirmation pop-up

4. CSP won't be fully enabled until you **Save**.
5. We recommend navigating around your knowledge base after you've enabled the CSP to ensure that you didn't overlook any necessary domains or resources. Console errors can help you identify things you missed!

default-src

This CSP directive is used as a fallback when any of the others don't have values specified. See MDN Web Docs for more information. We include default-src ***.knowledgeowl.com**, **'self'**, **'unsafe-inline'**, and a few other required resources here even if you don't specify them.

script-src

This CSP directive specifies valid sources for JavaScript. This includes not only URLs loaded directly into `<script>` elements, but also things like inline script event handlers like `onclick`. See MDN Web Docs for more information.

Fancy Box
If you're using the Fancy Box plugin for images, include **cdnjs.cloudflare.com** in this list. You may also want to add **'unsafe-eval'** to this list. See MDN Web Docs for more information.

Before you enable, consider checking these places for domains you may be running scripts from and be sure you've added them to this directive:

- **Settings > Style > Custom HTML**: Body, Article, etc.
- **Settings > Style > Custom Head**
- **Library > Snippets**: Check individual snippets that may be running scripts themselves

style-src

This CSP directive specifies valid sources for stylesheets. See MDN Web Docs for more information.



Fancy Box
If you're using the Fancy Box plugin for images, include **cdnjs.cloudflare.com** in this list.

Before you enable, consider checking these places for references to external stylesheets and be sure you've added them to this directive:

- **Settings > Style > Custom HTML**: Body, Article, etc.
- **Settings > Style > Custom Head**
- **Library > Snippets**: Check individual snippets that may be running scripts themselves

font-src

This CSP directive specifies valid sources for fonts loaded using `@font-face`. See MDN Web Docs for more information.

Before you enable, consider checking these places for references to font-face rules containing external resources:

- **Settings > Style > Fonts**: If a Custom Font is selected, be sure to add that domain.
- **Settings > Style > Custom CSS**: Look for any font-face rules.
- **Settings > Style > Custom Head**: Look for any font references outside of KnowledgeOwl.
- **Library > Snippets**: Check individual snippets to be sure they don't have font-face rules.

img-src

This CSP directive specifies valid sources for images and favicons. See MDN Web Docs for more information.

Before you enable, consider checking these places for references to images outside of KnowledgeOwl:

- **Settings > Style > Custom Head**
- **Settings > Style > Custom CSS**
- **Settings > Style > Custom HTML**: Body, Homepage, Article, etc.
- Individual snippets or articles containing external images in the body or in article thumbnails/banners

Basic authentication

Last Modified on 08/07/2024 3:12 pm EDT

Sometimes, to facilitate integration with a third-party tool, it's useful to have an account that uses basic authentication (basic auth). Basic auth uses an email address and a password, similar to readers set up directly in KnowledgeOwl.

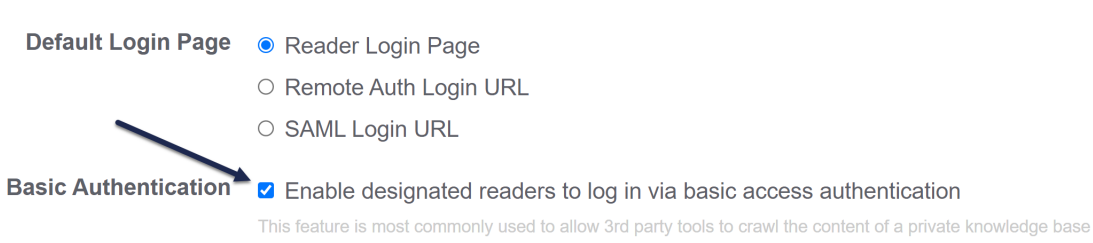
Basic auth can be useful if you have your knowledge base access restricted in one format, but you'd like to give a third-party tool its own reader account to authenticate with. We see this most often used for tools that crawl your knowledge base for various purposes (such as Amazon's Kendra or other chatbot/search integrators).

To enable Basic Authentication in KnowledgeOwl, you need to enable the overall setting in **Settings > Security** and then configure an individual reader account to use basic auth. See below for more detailed instructions.

Knowledge base setup

First, enable basic authentication for your knowledge base overall:

1. Go to **Settings > Security**.
2. In the **Security Settings** section, look for the **Basic Authentication** subsection.
3. Check the box next to "Enable designated readers to log in via basic access authentication."



4. **Save** your changes.

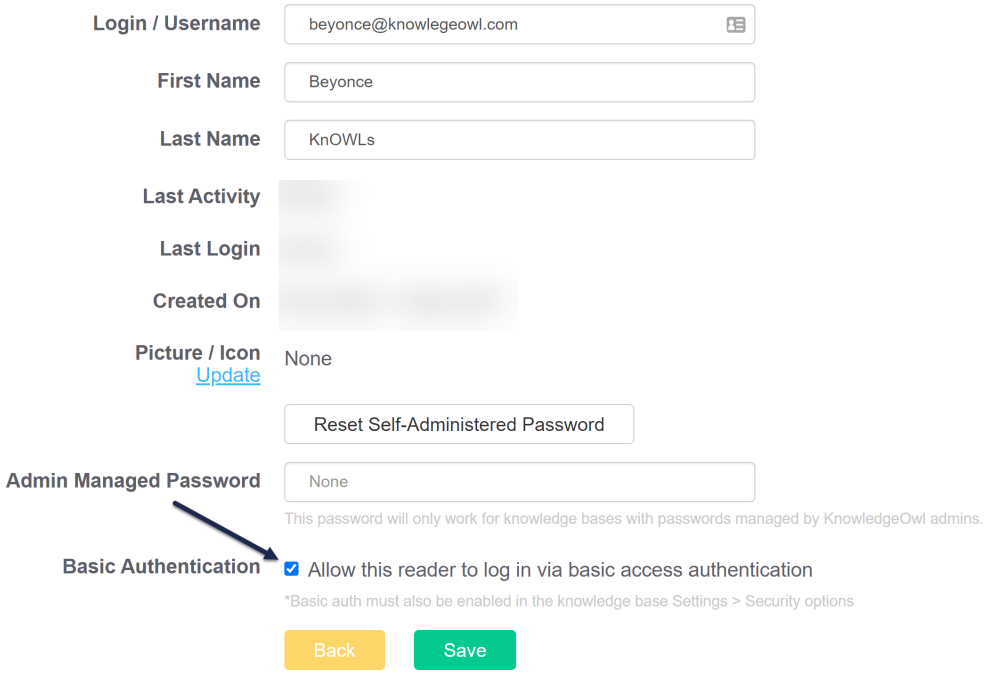
Reader setup

Once you have basic auth enabled for the knowledge base as a whole, you need to designate a reader account to use that authentication:

1. Select your profile icon/name in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. You can choose to create a new reader account to use with basic auth or edit an existing reader account to use as your basic auth account. Be sure the reader account is set up with a self-administered password.

4. Once you're in the **Edit Reader** screen viewing the details of the reader account you'd like to use, look for the **Basic Authentication** subsection.

5. Check the box next to **Allow this reader to log in via basic access authentication**.



6. Be sure the reader has access to the appropriate knowledge base(s) and/or reader group(s).

7. **Save** your changes.

You can now use the email address and password you set this account up with as the username/password for your third-party tool.

What is reCAPTCHA?

Last Modified on 08/07/2024 3:13 pm EDT

reCAPTCHA is a free service from Google that helps prevent spam activity in your knowledge base.

It's designed to verify that someone signing up for a subscription is a real person and not a bot. A "CAPTCHA" is a simple test--usually a task that is very easy for a human to perform, but hard for bots and other malicious software to figure out. There are two versions of reCAPTCHA:

- v2: Verify requests with a challenge. Example: checking a box next to "I am not a robot."
- v3: Verify requests with a score. Example: click on all the images that have cars in them.

KnowledgeOwl currently supports specific versions in specific places:

- v2: Supported in the full knowledge base; not supported in Contextual Help Widget (2.0). For these reCAPTCHAs, configurations with "I am not a robot" reCAPTCHAs, and you can see one in action if you try to subscribe to a category in this knowledge base.
- v3: Supported in Contextual Help Widget (2.0); not supported in the full knowledge base.

Only v2 reCAPTCHAs will work properly in your main knowledge base. We've tested our configurations with "I am not a robot" reCAPTCHAs, and you can see one in action if you try to subscribe to a category in this knowledge base!

What is an author?

Last Modified on 05/29/2024 5:28 pm EDT

An author is someone who can log in to the back-end of your KnowledgeOwl account to create and edit content, customize settings, or view reporting. Authors are different from the people who can view your content, who we call readers.

All authors are assigned to specific knowledge bases with a particular role for that knowledge base. That role determines what actions the author can complete in that knowledge base. So an individual author account can have editor permissions on one knowledge base, writer permissions on another, and no access to a third knowledge base. You can create custom roles for your authors, too.

In addition to their knowledge base + role assignments, authors can have two additional administrative permissions:

- **Full Account Admin**: has the ability to edit other authors' accounts and other high-level administrative settings; can assign and remove authors from knowledge bases (including themselves). This shows the Authors, API, Readers, and Webhooks menu options within the **profile icon/name** menu in the upper right.
- **Admin access to readers**: with this access, authors see the Readers option when they open their **profile icon/name** menu in the upper right, can view all reader accounts across all your knowledge bases, and can create, delete, and edit existing readers. They will not see Authors, API, or Webhooks menu options.

Author permissions

Last Modified on 05/29/2024 5:27 pm EDT

KnowledgeOwl has four levels of author permissions.

You can think of these permissions as answering several questions:

- **Which knowledge bases do I have access to?** (Knowledge Base Roles)
- **What actions can I complete in those knowledge bases?** (Knowledge Base Roles + Admin Rights)
- **Which content can I complete those actions on?** (Author Teams)
- **Which content can I see in those knowledge bases?** (Reader Groups)

1. **Admin Rights**
   There are three options for Admin Rights: Full Account Admin, Admin access to readers, and Admin ability to purge readers.

   a. Authors with **Full Account Admin** permissions can perform all actions in your account, including adding new authors; managing author permissions; creating and deleting API keys; updating account and billing information; creating and managing readers, groups, and reader settings; purging deleted readers; and cancelling your account.

   b. Authors can also be given **Admin access to readers** – which allows them to create and manage reader, groups, and reader settings – without the other Full Account Admin actions.

      i. Those with this right can also be given the permission to **Admin ability to purge readers**. This lets you control whether you want to also give them the ability to permanently purge deleted readers.

2. **Knowledge Base Roles**
   Roles determine which actions an author can complete in the knowledge base. You specify what role an author has for each knowledge base in your account. KnowledgeOwl has two default roles, Editor and Writer, as well as the ability to create Custom Roles to further restrict what actions different authors are able to perform in your knowledge base. An author with no access will not see the knowledge base.

3. **Author Teams**
   You can control which content individual authors are able to edit using Author Teams. When you create an Author Team, you can restrict editing access for categories and articles to the team. Only authors who are part of the team will be able to edit restricted articles, or articles within a restricted category.

4. **Reader Groups**
   You can control what content individual authors can see using reader groups. By default, all authors have access to see all content. When you create a reader group, you can restrict categories and articles to that group. If you choose to restrict an author to a reader group, the author **will only be able to see content that is not restricted or that is restricted to their reader group.**



We only recommend assigning Reader Groups if you have a very specific reason to do so,

since they will completely hide some content from authors and each time a new reader group is added, you must manually assign authors to the new group.

Add an author

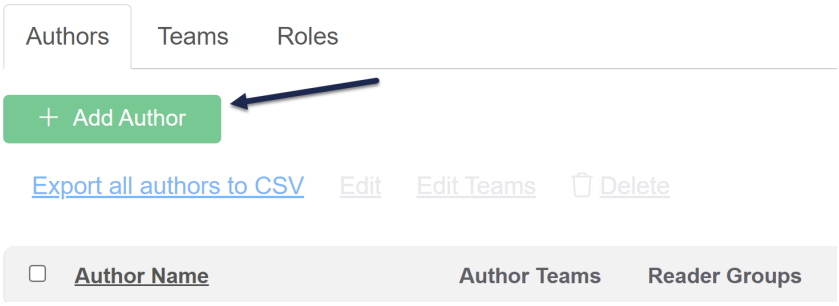
Last Modified on 05/29/2024 5:27 pm EDT

Authors who are full account admins can add new **Authors**.

When you add a new author, an invitation email will be sent with a temporary password. When the new author first logs in to KnowledgeOwl, they will be asked to update their password.

To add a new author:

1. Click on your **profile icon/name** in the upper right.
2. Select **Authors** from the dropdown to access the Authors area of your account.
3. Click the **+ Add Author** button near the top.



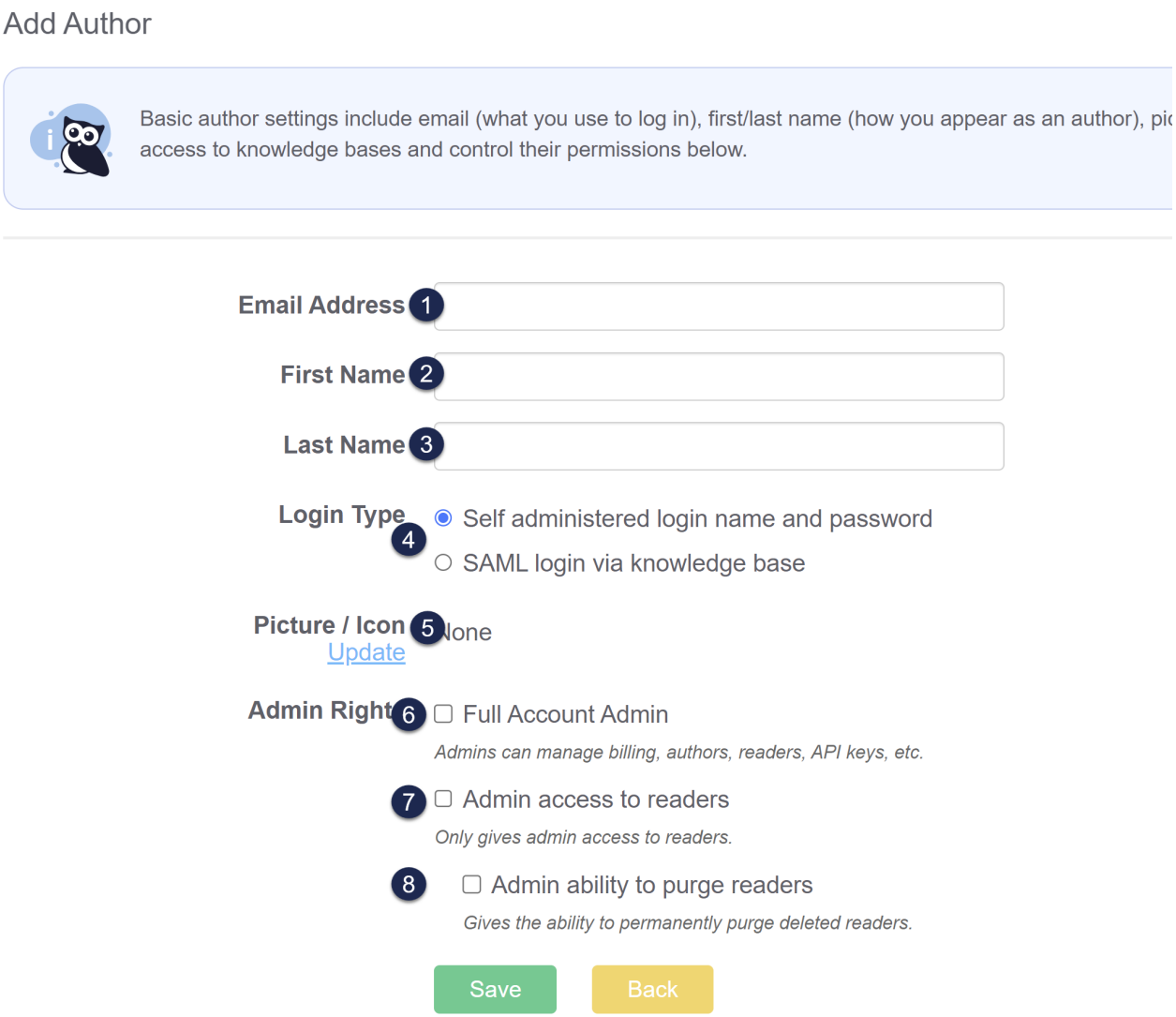
If you don't see the + Add Author button, and instead you see an **Upgrade for More Author Seats** button, you do not have any available author seats. You can add them by clicking that upgrade button or going to your **profile icon/name > Account** to upgrade the number of authors in your trial or account.

4. Clicking the **+ Add Author** button will open the Edit Author screen. You'll need to:
    - Add the author's account details
    - Add access to at least one knowledge base
    - *Optional:* assign the author to one or more author teams
    - *Optional, unusual:* assign the author to one or more reader groups
5. **Save** your changes.

Let's walk through each section in more detail.

Author account details

The author account details (top section) establish the login details and admin privileges for this author.



1. **Email Address** (required): This email address is where the author welcome email will be sent; it also acts as the author's username.
2. **First Name** (recommended, will display for author/log purposes)
3. **Last Name** (recommended, will display for author/log purposes)
4. **Login Type** (required, defaults to Self administered username and password) -- see Author login type for more information
5. **Picture / Icon** (optional)
6. **Admin Rights - Full Account Admin** (optional) grants access to:
    - **profile icon/name > Account** (Billing)
    - **profile icon/name > Authors** (create, delete, edit authors)
    - **profile icon/name > Readers** (create, delete, edit readers; purge deleted readers)

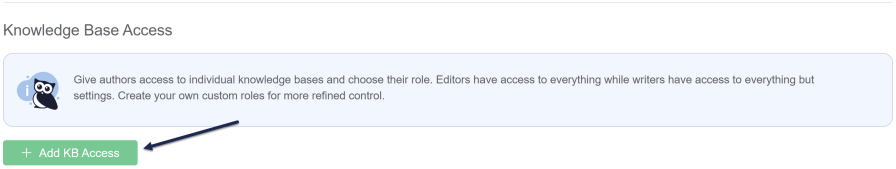
- **profile icon/name > API** (API keys)
- **profile icon/name > Webhooks**

7. **Admin Rights - Admin access to readers** (optional) grants access to only the **Readers** portion of the **profile icon/name** Admin menu.
8. **Admin Rights - Admin ability to purge deleted readers** (optional): If Admin access to readers is checked, this option also grants the author the ability to purge deleted readers.

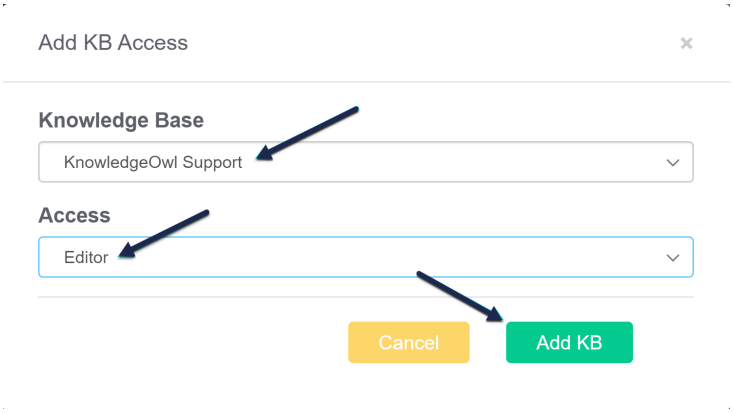
Knowledge Base Access

All authors are required to have access to at least one knowledge base.

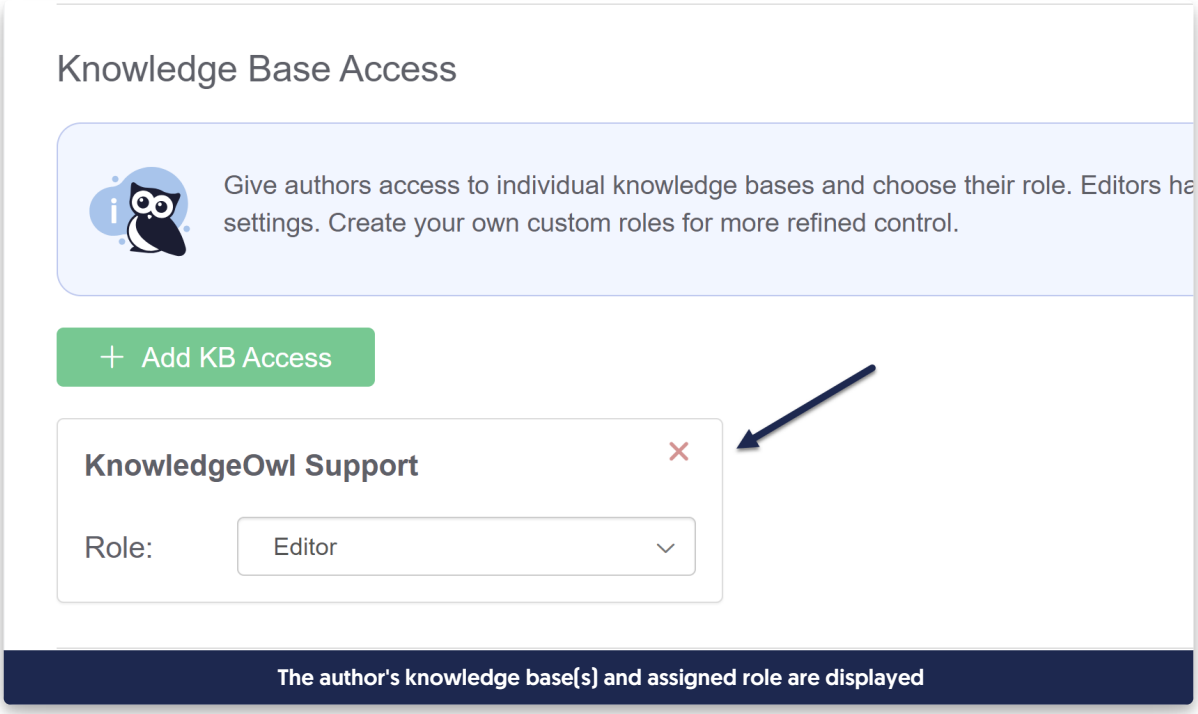
1. Click the **+ Add KB Access** button.



2. Select the **Knowledge Base** you want this author to access from the dropdown.
3. Select the **Access** (role) you want this author to have for this knowledge base. Editor and Writer are built-in roles; additional roles listed here will depend on whether you've created Custom roles. See What is the difference between an editor and a writer? and the custom role permissions breakdown for these roles' permissions.
4. Click the **Add KB** button to save these assignments.



5. Once you click Add KB, you'll see the knowledge base and the role displayed:



6. Repeat this process for each knowledge base you'd like to grant this author access to.
7. Once you've completed this steps, you can **Save** the author. The last two sections are optional.

Author Teams

While roles decide which actions an author can complete, author teams decide which content an author can interact with. By default, no existing author teams will display here.

Once you've created author teams, a list of the teams will appear and you can check the boxes next to the appropriate teams here and save.

See What are author teams? and Create author teams for more information.

Reader Groups

By default, authors have access to **all** reader groups in your knowledge base, and can see content relating to all readers. If you'd like to limit this author to only see content restricted to particular reader groups, check the boxes next to the appropriate groups here and save.

If you want an author to have access to all content in the knowledge base, DO NOT ADD reader groups to their account.

Edit authors and permissions

Last Modified on 05/29/2024 5:28 pm EDT

Authors with **Full Admin** permissions can manage all authors by going to their **profile icon/name** and selecting **Authors.**

The Authors page displays all authors and permissions along with the date of their last activity in app.knowledgeowl.com.

You can edit an individual author by clicking on their name and editing their author account details.

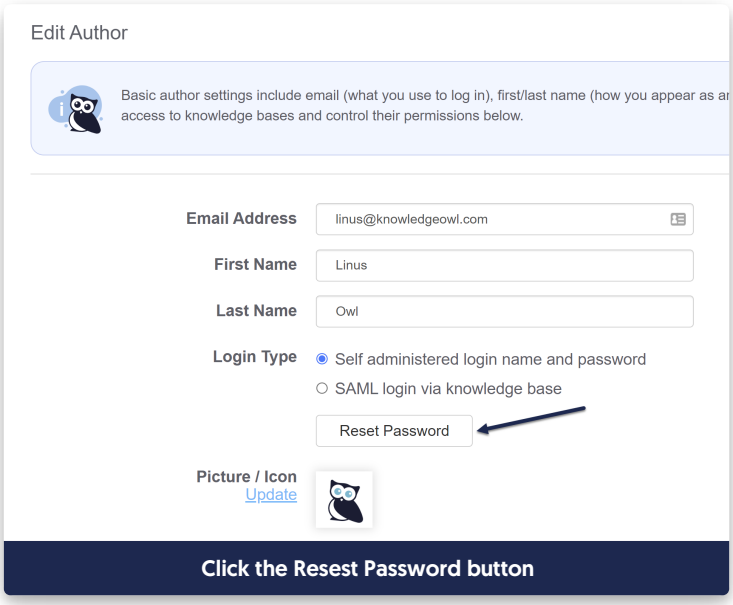
Reset an author password

Last Modified on 05/29/2024 5:28 pm EDT

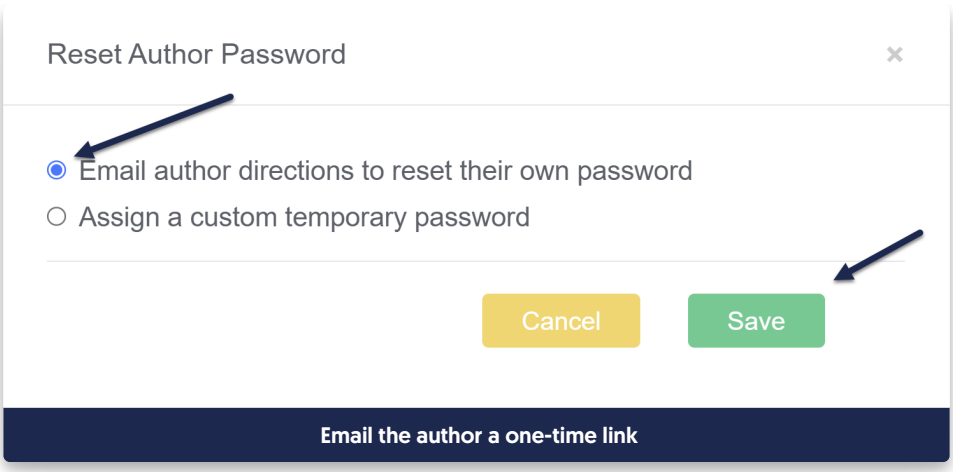
Authors can request a password reset email on the KnowledgeOwl login page. Authors can also change their own password by going to their **profile icon/name** and selecting **Change Password**.

Authors with Full Admin access can also reset passwords for other authors. To do so:

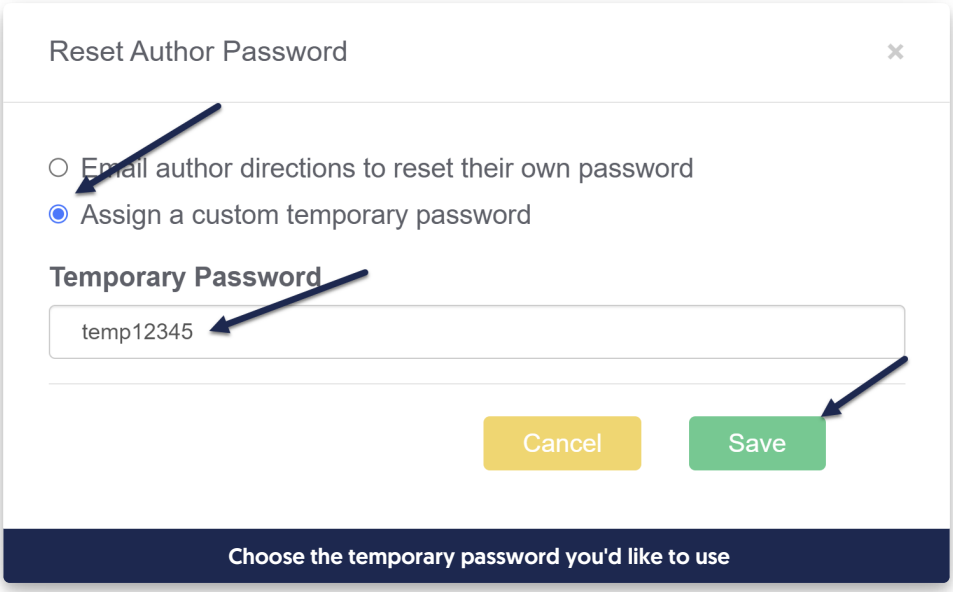
1. Click on your **profile icon/name** in the upper right.
2. Select **Authors** from the dropdown to access the Authors area of your account.
3. Click on the author whose password you'd like to reset.
4. Click the **Reset Password** button.



5. You'll have the option to email the author directions to reset their own password or assign a custom temporary password.
    - If you select the option to email directions to reset their own password, the author will receive an email with a one-time link that they can click to log in and reset their own password. This works well if you want the author to be automatically notified of the password reset. To send the directions and link, select this option and click the **Save** button.



- **To assign a custom temporary password, select that option and enter the password of your choice. Then click the Save button. This works well if you'd like to test the reset yourself to troubleshoot login issues, or if you want to notify the author of the temp password yourself directly.**



6. **When the author logs in with the reset link or the temporary password, they will be asked to update their password.**

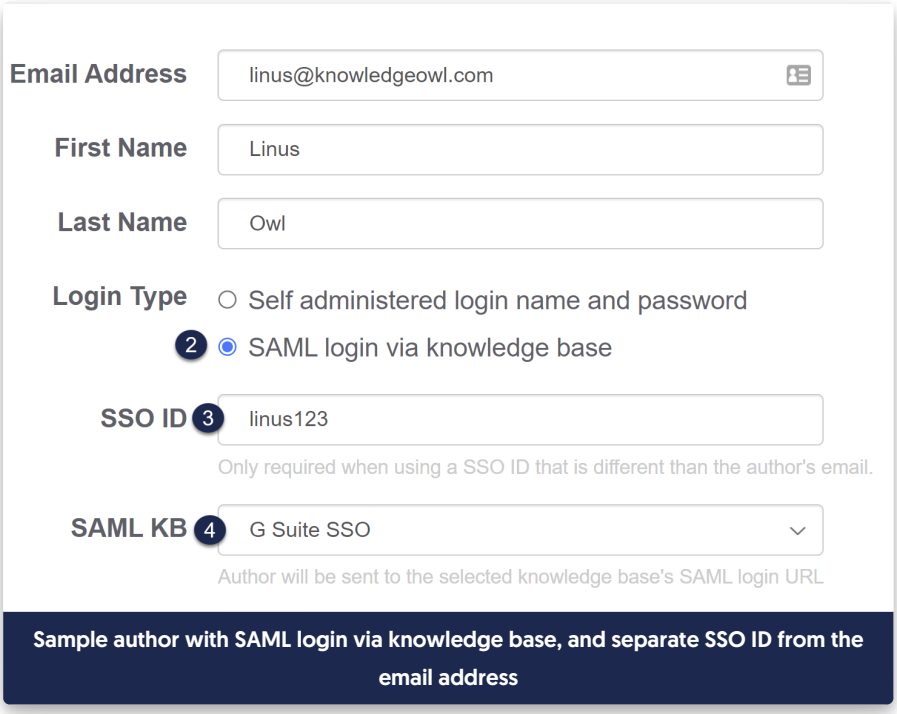
Author login type

Last Modified on 05/29/2024 5:27 pm EDT

By default, authors are created with self-administered usernames and passwords. This means that, even when you have SAML/SSO enabled for your knowledge base overall, KnowledgeOwl will store a password for each of your authors and allow them to log in using that username/password combination via https://app.knowledgeowl.com/login.

If you would like to prevent this alternate login and force your authors to authenticate using SAML/SSO, you can change the **Login Type** to "SAML login via knowledge base":

1. Open the author (or create a new author).
2. In **Login Type**, select the option next to "SAML login via knowledge base".
3. **SSO ID *(optional):*** By default, the author's email address will be used as their SSO ID. If your SSO system uses an ID different ID for this author, add that ID here. Otherwise, leave it blank.
4. **SAML KB:** Select the knowledge base the author needs to log in through. You **must** have a knowledge base with a SAML integration configured for this to work.



Sample author with SAML login via knowledge base, and separate SSO ID from the email address

5. As with other authors, set the **Admin Rights, KB Access, Author Teams**, and **Reader Groups** that are appropriate.
6. **Save** the author.

This setting basically says: "If the author tries to log in normally (using https://app.knowledgeowl.com/login),

don't let them use their username/password and send them to the SAML login page for the KB I choose instead."

This setting does not need to be enabled for your authors to be able to log into the application via SAML.

When you set an author's login type to SAML login via knowledge base as you're creating their account, they will also receive a customized welcome email. Instead of the link to app.knowledgeowl.com/login, it will display the URL of your knowledge base's SAML login and steps on how to access the KnowledgeOwl app from there (the URL in Step 1 will change based on your settings):

---

knowledgeowl

Hi Sammy,

You are invited to join KnowledgeOwl!

To accept this invitation and log in to your account:

1. Go to https://myknowledgebase.knowledgeowl.com/help/saml-login
2. Follow the prompts to log in using Single Sign-On (SSO)
3. Click on Add Content or Edit in App at the bottom left of the screen to access the KnowledgeOwl app

---

Let us know if we can answer any questions or help in any way!

Your new friends at KnowledgeOwl



Note: if you set an author to SAML login via knowledge base and your SAML/SSO has an issue, your authors will be locked out of KnowledgeOwl. Most customers keep username and password self-administered so that their authors have an alternate way to log in in cases of issues with SAML/SSO. Generally only customers with very strict security requirements enable this option.

Default author roles

Last Modified on 07/10/2024 1:04 pm EDT

KnowledgeOwl comes with two default author roles:

- **Editor:** can perform all actions in a knowledge base, including customizing any setting
- **Writer:** can perform any action related to creating and editing content; does not have access to customize settings

Here's a full breakdown of each role's permissions:

Permission	Editor	Writer
Create any type of new article: • From scratch • From a template • From any existing article • Content linked to an existing article	X	X
Edit articles that are in draft mode	X	X
Edit articles that are published	X	X
Create new versions of articles	X	X
Edit versions of articles	X	X
Delete versions of articles	X	X
Activate versions of articles	X	X
Publish articles that are in draft mode	X	X
Move / re-order articles	X	X
Archive articles	X	X
Delete articles	X	X
Edit articles in bulk	X	X
Create new categories	X	X
Edit categories	X	X
Move / re-order categories	X	X
Delete categories	X	X
Create new internal notes	X	X
Edit internal notes	X	X
Remove internal notes	X	X
Edit homepage content	X	X
Create new comments	X	X
Approve submitted comments	X	X
Delete submitted comments	X	X
Add glossary terms	X	X
Edit glossary terms	X	X
Delete glossary terms	X	X
Add snippets	X	X
Edit snippets	X	X
Delete snippets	X	X

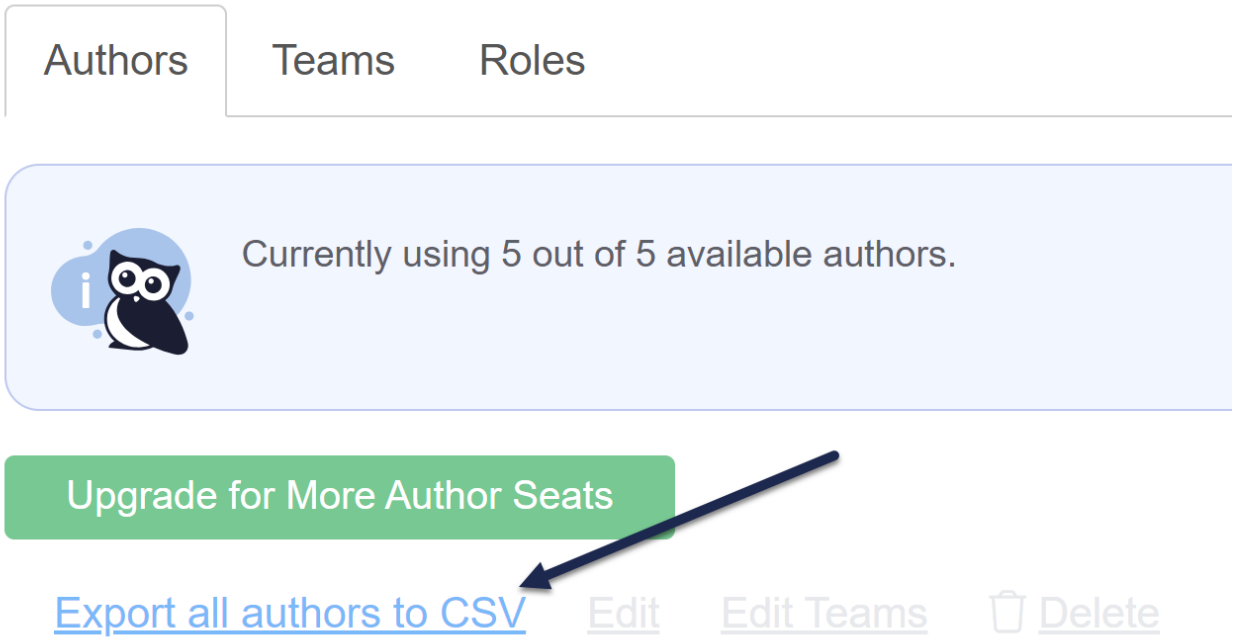
Permission	Editor	Writer
Edit files	X	X
Delete files	X	X
Create file labels	X	X
Edit file labels	X	X
Delete file labels	X	X
Add existing tags to articles	X	X
Edit existing tags	X	X
Add new tags	X	X
Remove tags from articles	X	X
Delete tags	X	X
Create and manage exports - PDFs / HTML Zip	X	
Import content	X	
Update article ratings settings	X	
Update article favorites settings	X	
Update basic settings	X	
Update comment settings	X	
Update contact form settings	X	
Update PDF settings	X	
Update search settings, synonyms, and reindex search	X	
Update security settings	X	
Update style / theming	X	
Update subscription settings	X	
Update required reading settings	X	X
Update widget settings	X	
View Reporting > Dashboard	X	X
View Reporting > Contact Form	X	X
View Reporting > Widget	X	X
View Reporting > Comments	X	X
Reset individual article ratings	X	
Reset all article ratings	X	
Reset individual article view counts	X	
Reset all article view counts	X	
View required reading reports	X	X
Run Broken Links Report	X	X
Run Advanced Search	X	X
Update Customize Text	X	X

To further restrict what actions an author can perform, create a custom role.

Export a list of authors

Last Modified on 05/29/2024 5:27 pm EDT

If you have permissions to view **Authors** in your **profile icon/name** menu, you have permission to Export all authors to CSV by clicking the link near the top of the Authors page:



Clicking this link will generate a CSV file that will display:

- **Author ID**: a random ID we assign to the author behind the scenes; you can ignore this.
- **Last name**
- **First name**
- **Email**
- **Admin**: Whether the author is designated as a full admin (Yes/No)
- **Last Activity**: the date/timestamp when they last did anything in KnowledgeOwl
- **Last Login**: the date-timestamp when they last logged in to KnowledgeOwl. Since our login page supports "Keep me logged in" options, sometimes this date is very different from date of Last Activity. If you're trying to see who's actively using KO, Last Activity is a better measure!
- **Author Teams** (if more than one, these will appear in a comma-separated list)
- **Reader Groups** (if more than one, these will appear in a comma-separated list)
- One column for each knowledge base in your account--if the author has access to the knowledge base, the role they have will display in the knowledge base's column

Here's a sample:

	A	B	C	D	E	F	G	H	I	J
1	Author ID	Last Name	First Name	Email	Admin	Last Activity	Last Login	Author Teams	Reader Groups	KnowledgeOwl Support
2	602bfb8c8a161ce35d6448dd	Owl	Linus	linus@knowledgeowl.com	Yes	04/27/2023 7:06pm EDT	04/04/2023 5:34pm EDT	Administrators, Support		Editor

This export can make it easier to audit your authors' access and see when they've logged in/been active.

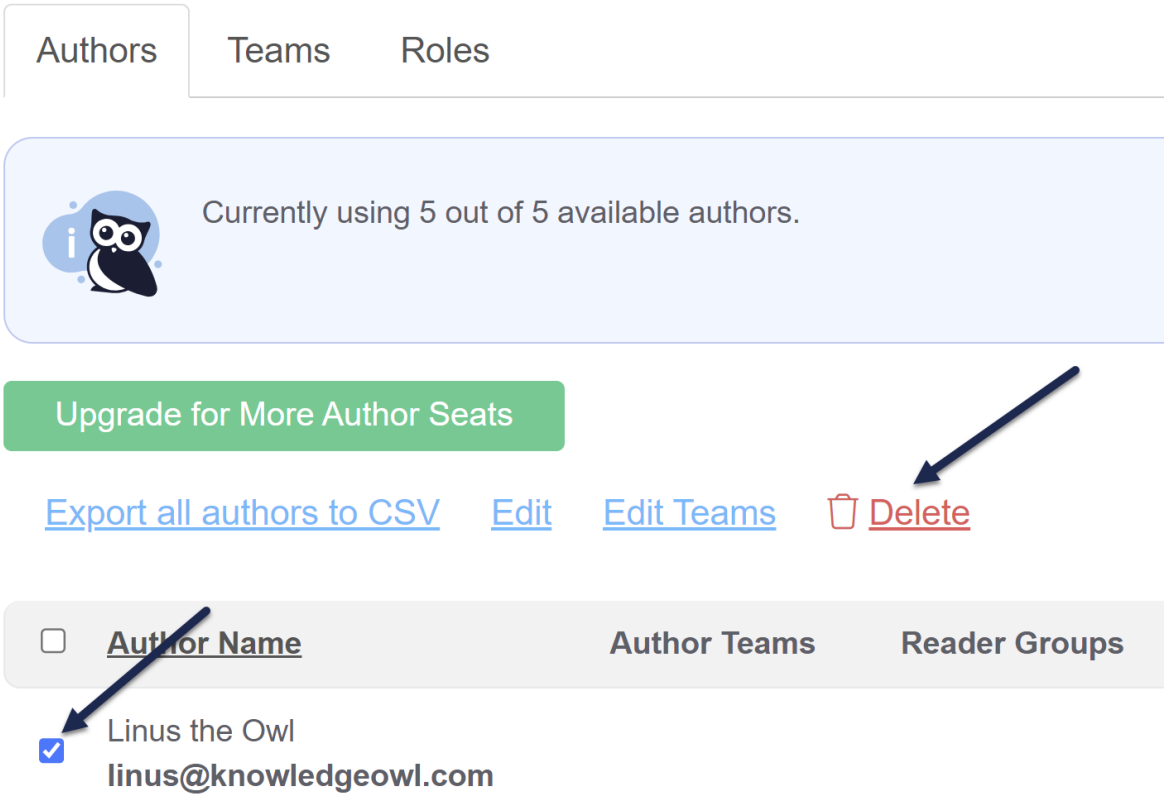
Delete an author

Last Modified on 05/29/2024 5:28 pm EDT

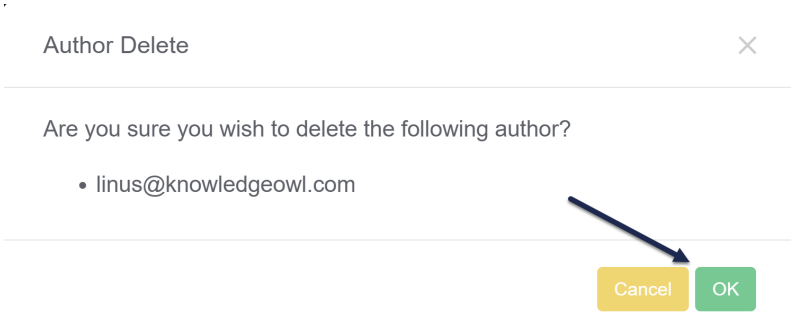
Only authors with **Full Admin** privileges can delete other authors. See **What happens when I delete an author?** for more info on what happens once you delete an author.

To delete an author:

1. **Click on your profile icon/name in the upper right.**
2. **Select Authors from the dropdown to access the Authors area of your account.**
3. **Find or search for the author you'd like to delete.**
4. **Check the box to the left of their name.**
5. **Click the Delete link above the author list.**



6. **When the confirmation window appears, be sure that the author(s) listed there are the ones you intend to delete, and click OK to finish deleting them.**



7. **If this author was listed as the author for any articles, we recommend updating those articles to have a new author. The easiest way to do so is to:**
    - **Create a Manage Articles filter showing all articles with this author as the official author**
    - **Bulk editing them to have a new author**

Once the author is no longer listed as an author for any articles, their name will disappear from the Author dropdown and filter fields. See What happens when I delete an author? for more information.

What happens when I delete an author?

Last Modified on 05/29/2024 5:28 pm EDT

When you delete an author, they will no longer be able to log in to KnowledgeOwl.

Content

Deleting an author will **not** delete or lose any content that they edited. Articles and categories will continue to have the same content they had before the deletion.

Revision history

Deleting an author will **not** remove their name from the revision history for a given article. Their name will still be displayed in the revision list and when comparing revisions.

The Saved last date/timestamp and the revision history/count in the upper right of the article will stay the same.

However, if they were the last person to save an article, you will not see the "Saved by: [name]" between the Saved last date/timestamp and the revision history/count. That line will simply disappear. Once another author saves the article, it will reappear with the new author's name.

Author dropdowns and filters

If the author **is not** listed as the Author for any articles:

- Their name will disappear from the Author dropdown
- Their name will disappear from the Manage Articles Author filter.

If the author **is** listed as the Author for any articles:

- Their name will continue to appear in the Author field for those articles until you manually change the Author to a different author. (We recommend using a Manage Articles filter and Bulk Edit.)
- If you display author name in your articles, their name will continue to display until you change the Author.
- In the Article Editor, their name will continue to appear in the Author dropdown as long as they are listed as the Author for any articles.
- In Manage Articles, their name will continue to appear in the Author filter as long as they are listed as the Author for any articles.

Broken Links Report

Deleting an author will remove their name from the Author and Last Modified Author columns in the Broken Links Report.

Can authors share logins?

Last Modified on 05/29/2024 5:27 pm EDT

Authors are allowed to share logins in KnowledgeOwl, meaning that two people can be logged in as the same author at the same time. For security and content auditing reasons, we advise against sharing logins. (But we understand that sometimes it's financially necessary!)

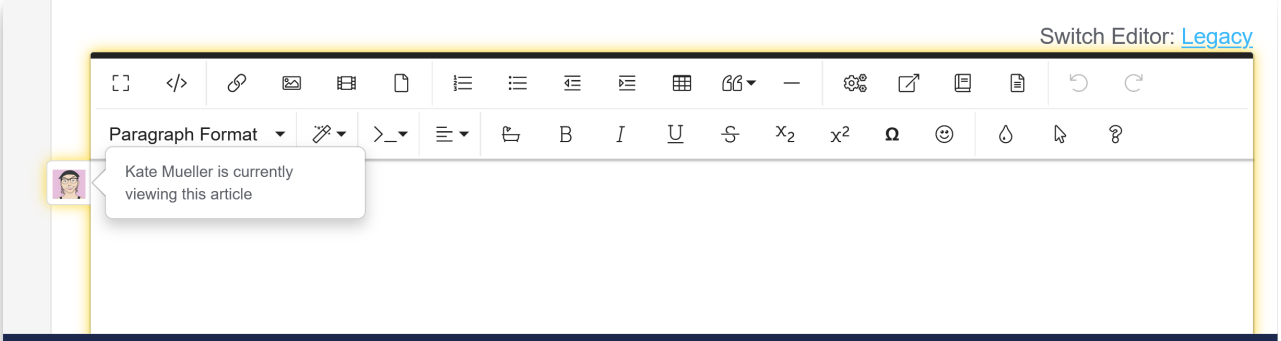
Can multiple authors work on the same article?

Last Modified on 05/29/2024 5:27 pm EDT

If you have multiple people viewing or editing the same article at the same time in the app, the editor will warn you by adding an icon to the editor and adding a color outline around it. (If the author has added a photo or icon, you'll see that; otherwise you'll see a generic gray gravatar shape.)

Viewing conflict

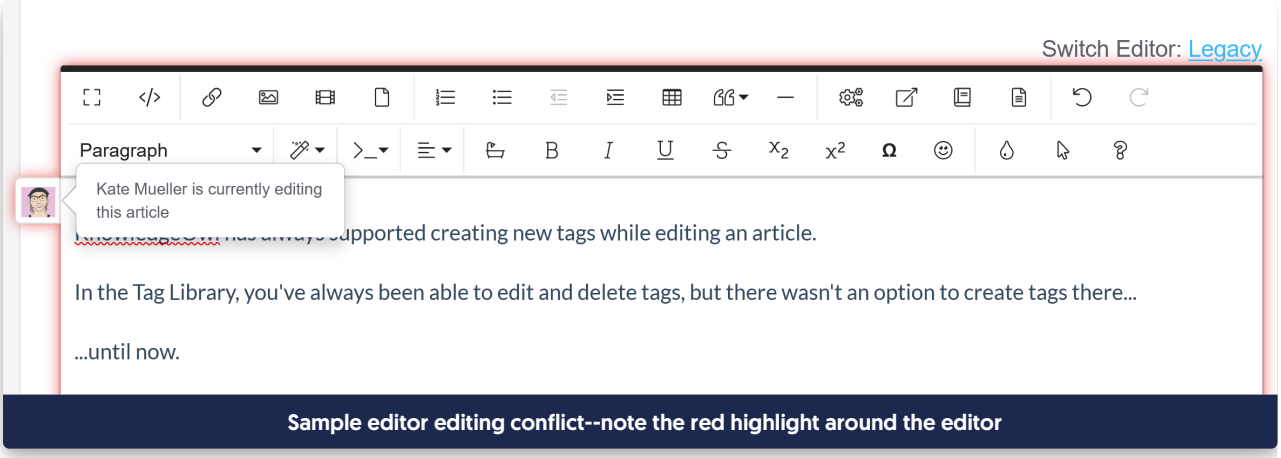
If someone else has the article open in the editor, but hasn't made any changes, you'll see the icon appear and a yellow outline will appear around the editor. You can hover your mouse over the icon to see the person who's accessing it:



Sample editor viewing conflict--note the yellow highlight around the editor

Editing conflict

If someone else has the article open in the editor and has started making changes, you'll see the icon appear and a red outline will appear around the editor:



Sample editor editing conflict--note the red highlight around the editor

If one of you tries to save changes that would overwrite the changes the other one has made, you'll get a

warning and can choose whether to keep your changes and overwrite the other person's, or to discard your changes and keep the other person's.

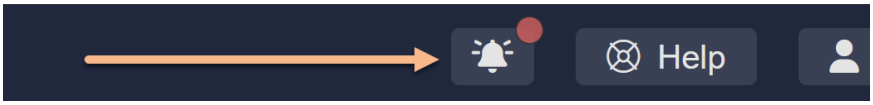
Author email delivery issues

Last Modified on 05/29/2024 5:27 pm EDT

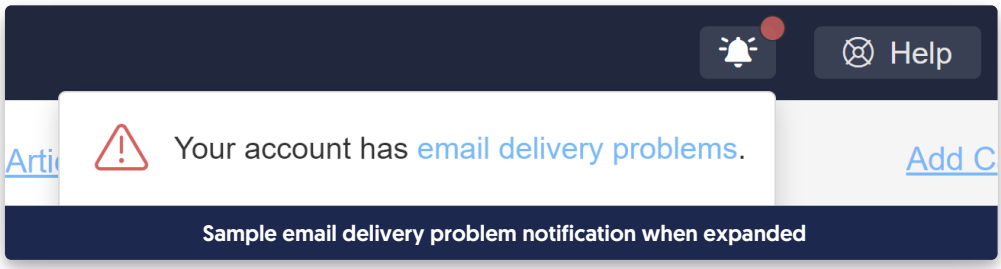
KnowledgeOwl generally sends three possible emails to authors:

- Welcome email: Sent when an author is given access to a new knowledge base
- Password reset email: Sent when an author requests a password reset or an admin initiates a password reset for the author
- Security token email: Only sent if we detect unusual behavior when an author attempts to log in and we initiate a security protocol

If we have trouble sending the welcome and password reset emails for any reason, a red notification dot appears over the notification bell in the site banner:



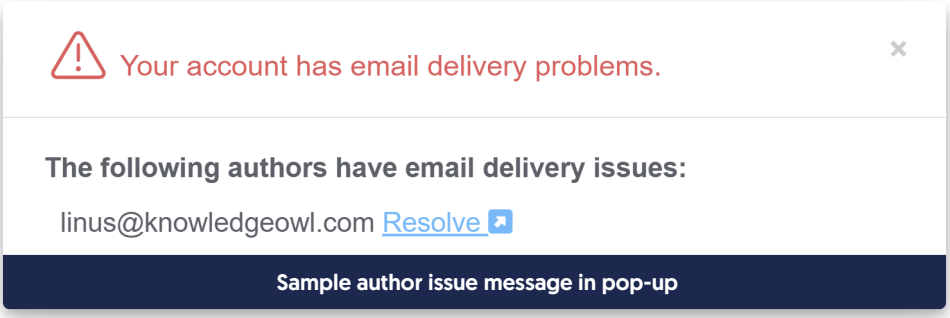
If you click on the notification bell icon, a message that your account has email delivery problems will appear:



Sample email delivery problem notification when expanded

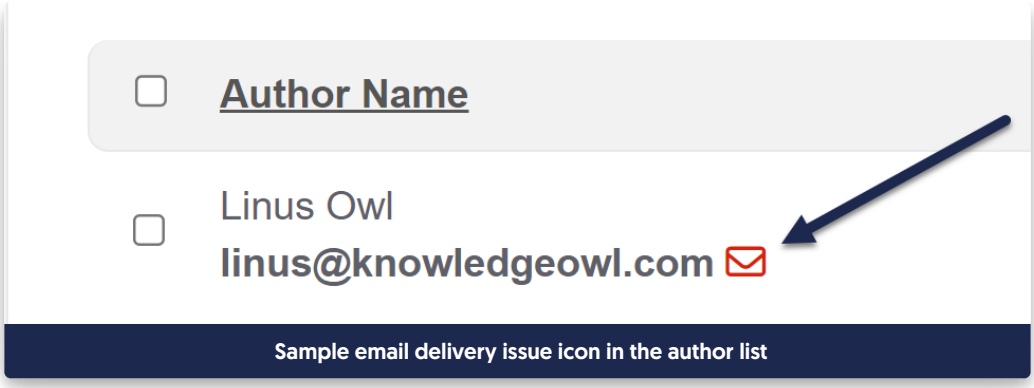
Click the hyperlinked **email delivery problems** text to open a pop-up that tells you what delivery issues there are.

When author email addresses have issues, we'll provide a list of the author(s) impacted by the issues. Click the **Resolve** link next to each author's name to jump straight to their details to try to troubleshoot what's going on.



Sample author issue message in pop-up

Any authors with email issues will also display a red envelope next to their name in the **Authors** page.



Sample email delivery issue icon in the author list

When you view the details for an author who has email delivery issues, a warning message displays above their email address. This message varies based on what's going on with the author. There are two basic scenarios you might see:

1. Email has issues but wasn't added to our suppression list: you'll see a green **Clear this Warning** button in the warning.

2. Email has issues and was added to our email suppression list: if this is the case, you'll see a green **Remove** button in the warning.

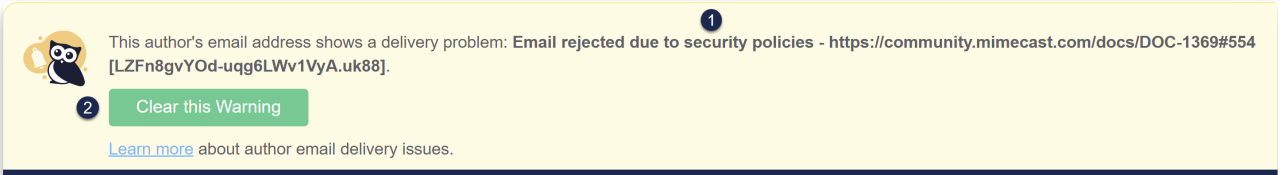
We'll walk through each scenario in more detail below:

Email has issues/not in suppression list

Email issues can crop up for any number of reasons, like migrating an email server, a temporarily full mailbox, and more. Many of these issues won't result in an email being added to the email suppression list. Some of them may resolve on their own; others may need explicit troubleshooting to resolve.

Our delivery provider only captures these warnings at the time it tries to send an email, so it's possible that the issue we captured has already been resolved by the time you look at it. If the email isn't on the suppression list, you can just Clear the warning in these cases!

When the email hasn't been added to the email suppression list, the author's warning will look a bit like this:



Sample author warning without suppression list; details of the delivery problem will vary

The information provided here is intended to help you troubleshoot what's going on with the author's email address:

1. Our mail delivery provider captures the **error code or message** when email delivery fails. We'll display this back to you here. You can use this to help troubleshoot what's going on:

    a. Verify that the author's email address is properly spelled. (You'd be amazed how often this is an issue for new author accounts!)

    b. Try sending an email to that address and see if you get a bounce/undeliverable message.

- If you don't get a bounce, the issue may have already resolved itself, and you can proceed with the next step.
- If you do get a bounce, the issue still requires troubleshooting. We recommend reaching out to you or your author's email administrator with the delivery error message to expedite resolution.

2. Once it seems like the author's email can properly receive emails, click the **Clear this Warning** button to clear the warning and remove the banner from your site. The warning will reopen if we continue to experience any issues emailing this author.

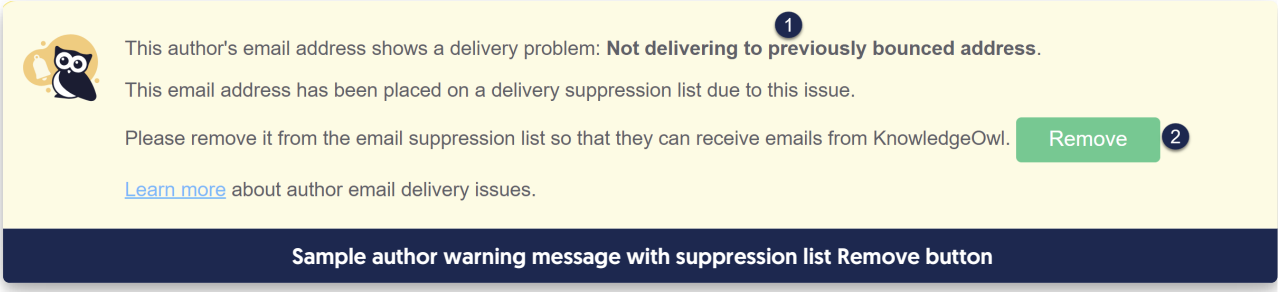
Email has issues and is in the suppression list

If an email address has had delivery problems and the address appears invalid, nonexistent, or misconfigured, it will also automatically be added to our mail provider's suppression list.

In these cases, even if the email address's underlying issue was resolved, KnowledgeOwl won't send any emails to the address until you remove it from the suppression list.

> Our delivery provider only captures these warnings at the time it tries to send an email, so it's possible that the issue we captured has already been resolved by the time you look at it. If that's the case, you'll only need to **Remove** the email from our suppression list.

When the email has been added to the email suppression list, the author's warning will look a bit like this:



Sample author warning message with suppression list Remove button

1. Our mail delivery provider captures the **error code or message** when email delivery fails. We'll display this back to you here. You can use this to help troubleshoot what's going on:
    a. Verify that the author's email address is properly spelled. (You'd be amazed how often this is an issue for new author accounts!)
    b. Try sending an email to that address and see if you get a bounce/undeliverable message.
        - If you don't get a bounce, the issue may have already resolved itself, and you can proceed with the next step.
        - If you do get a bounce, the issue still requires troubleshooting. We recommend reaching out to you or your author's email administrator with the delivery error message to expedite resolution.

2. Once it seems like the author's email can properly receive emails, click the **Remove** button. This will:

a. Remove the email address from our suppression list.

b. Clear the warning from the author's details.

c. Remove the warning banner from within KnowledgeOwl.

The warning will reopen if we continue to experience any issues emailing this author.

Why is this email address saying it's on a suppression list?

Last Modified on 05/29/2024 5:27 pm EDT

KnowledgeOwl uses a mail delivery provider to send automatic emails like:

- Author welcome and password reset emails
- Reader welcome and password reset emails
- Contact form submissions

Our mail delivery provider keeps track of email bounces and errors.

If a bounce occurs because the intended recipient's email address is returned as **invalid**, **nonexistent**, or **temporarily misconfigured**, our mail provider adds that email address to a suppression list.

Suppression lists are tools mail delivery providers use to help protect your email reputation, by preventing you from sending a bunch of emails that will bounce.

Once an email address has been added to this suppression list, no further emails will be sent to the email address unless you remove the email address from the suppression list.

For the email types listed above, KnowledgeOwl will throw a prominent warning when an email is having issues. When you view the details for that email address, we'll indicate if an address has been added to that automatic suppression list and give you the option to remove it from our suppression list so you can restart sending email to it.

For more details on working with each type of warning, see:

- Author email delivery issues
- Contact form submission email delivery issues
- Reader email delivery issues

What are author teams?

Last Modified on 05/29/2024 5:27 pm EDT

If authors have editing privileges, by default, they can edit **all** content in your knowledge base.

However, there are times when you'd like to be able to segregate who can edit which content. This is what Author Teams are for!

- First, create author teams.
- Then, assign authors to those teams.
- Finally, restrict categories or articles to those author teams.

Any content that is restricted to one or more author teams can **only** be edited by authors who belong to that team.

Any content that is not restricted to any author teams can be edited by all authors with editing access on that knowledge base.



Pro tip: If you are a full account admin and you'd like to keep editing privileges for all content, you should assign yourself to **ALL** author teams.

Use cases for author teams

Editors & Writers from different departments or teams

One of Linus's knowledge bases captures information for multiple departments across different lines of business. He has designated editors for each line of business:

- **Owlbus Dumbledore:** Flight & Aerodynamics; owns and manages content in the "Feathers & flight", "Aerodynamics", and "Flight Tips for Owlettes" categories
- **Minerva McGonagowl:** Nest building & Structural integrity; owns and manages content in the "Nest building", "Camouflage", and "Structural integrity" categories
- **Owl Pacino:** Defense & Food sources; owns and manages content in the "Home defense", "Hunting", and "Food sources" categories

Each of these editors is responsible for different categories in the knowledge base and might also manage contributions from various writers.

To keep these editors from accidentally or intentionally editing each other's content, Linus has created three Author Teams:

- Flight & Aerodynamics - assigned to Owlbus Dumbledore and all of his writers
- Nest building & Structural integrity - assigned to Minerva McGonagowl and all of her writers
- Defense & Food - assigned to Owl Pacino and all of his writers

He's then restricted each of his top-level categories to one of these teams. All subcategories and articles will inherit that author team restriction.

Finally, Linus assigned himself to all three of those author teams, so that he can make any final edits to all content.

Restrict single category

In another knowledge base, all of Linus's editors have access to all content. But his boss would like to add a section for HR staff to add HR materials. This content should only ever be updated by HR staff. HR staff can still update other knowledge base articles, though.

To solve this, Linus has created one Author Team called HR. He's restricted the HR category to this team--and nothing else.

All authors who have no author teams can update all content that isn't restricted, but they won't be able to touch the HR content. HR members will be able to update all other content as well as the HR category.

If Linus needs access to edit/oversee that content, he should also add himself to the HR author team.

Prevent contractor from editing other content

In our support knowledge base, Linus would like to give access to an independent security consultant to update our security policies. This author needs to be able to edit only the security policy content and nothing else. All other authors should be able to edit both the security content AND the rest of the content.

In this case, Linus needs to create two author teams:

- one for his security consultant, called "Security team"
- one for all other authors, called "All content"

He'll restrict all categories to the "All content" team; he'll restrict the Security Policy category to both the "All content" team and the "Security team". He'll add himself to both teams, just to be safe.

Because all content is restricted to a specific team, and all other categories are NOT restricted to the Security team, the security consultant will only be able to edit the security category.

Because all categories--including the security category--are restricted to the All content team, authors with that author team will still be able to edit all content.

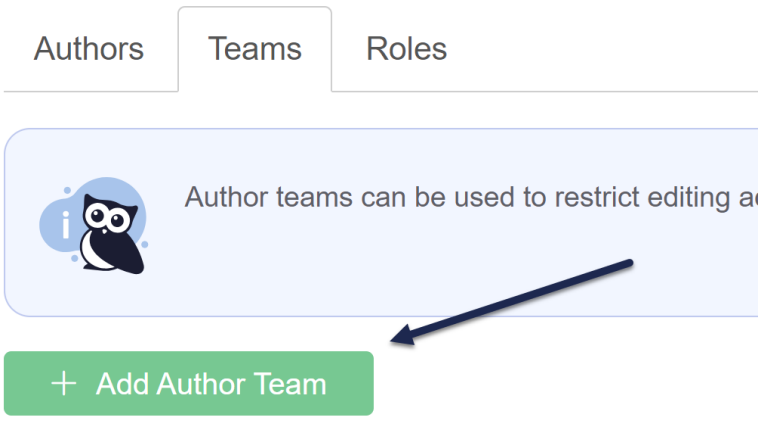
Create author teams

Last Modified on 05/29/2024 5:27 pm EDT

You must have **Full Admin Access** to create author teams.

To create a new author team:

1. Click on your **profile icon/name** in the upper right.
2. Select **Authors** from the dropdown to access the author details for your account.
3. Open the **Teams** tab.
4. Click on the **+ Add Author Team** button.



5. In the Create Team pop-up, give your team a Name and click the **Create Team** button.



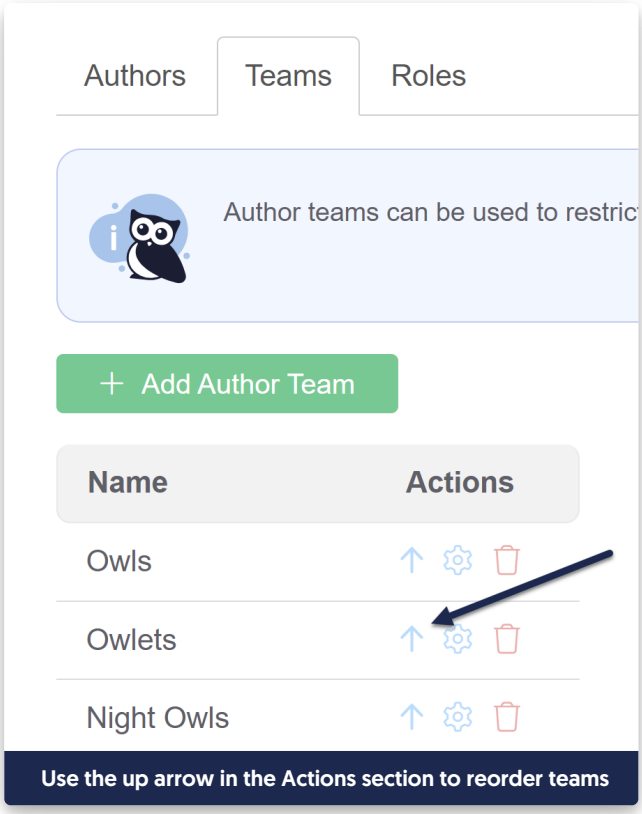
Once your team is created, you can add authors to the team and restrict categories or articles to editing by that team.

Change the order of author teams

Last Modified on 10/07/2024 9:13 pm EDT

To set the order of your author teams:

1. Go to Your **Account** > **Authors**.
2. Click on the **Teams** tab.
3. Use the up arrows next to your team names to reorder the teams.



Once you're done making changes, you'll see those changes reflected:

- In article editor, the Restrict to Teams section
- In category editor, the Restrict to Teams section
- In the edit screen for an individual author, in the Author Teams section
- In Manage Articles create/edit filter, the Teams section

Restrict content to author teams

Last Modified on 10/07/2024 9:13 pm EDT

You can restrict entire categories or individual articles to editing by one or more author teams.



Cascading author team restrictions
If you restrict a category to editing by specific author teams, all content within that category (subcategories + articles) will inherit the same author team restrictions.

1. Open the category or article in edit mode.
2. In the **Restrict to Teams** section, check the boxes next to the teams you'd like to restrict this content to.
3. **Save** your category or article.

Author team restrictions set at the category level will be inherited by all articles in that category.

Inherited author team restrictions

Last Modified on 05/29/2024 5:28 pm EDT

If you restrict a category to Restrict content to author team, that restriction is **automatically** applied to all articles within that category.

This means several things:

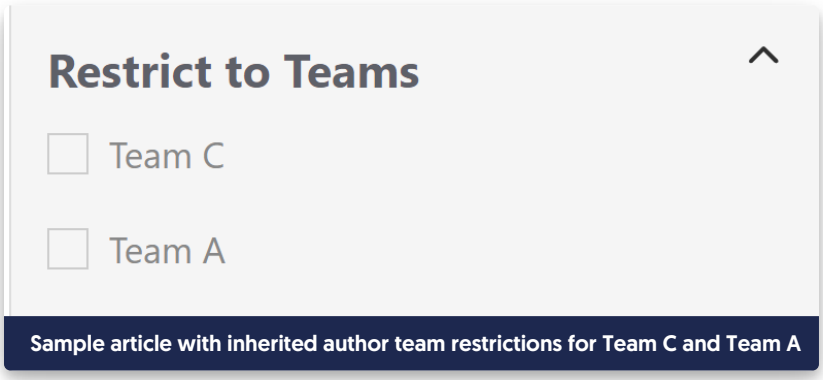
First: articles within that category will all be editable by *only* the author teams set for the category overall. You cannot add additional author teams to individual articles; they must be added at the category level.

You'll see this expressed in the **Restrict to Teams** section, since articles with these inherited author team restrictions will only list the author teams that the whole category is restricted to. (They'll be missing checkboxes for any other author teams in your knowledge base).

In the knowledge base we're considering, there were three author teams:

- Team C
- Team A
- Team Z

If I restrict a category to Team C and Team A, when I open an article within my restricted category, I'll only see those two author teams listed in the checkboxes:



Sample article with inherited author team restrictions for Team C and Team A

When collapsed, the summary for the section will list these inherited teams (unless you have further refined the author team restrictions; see **Third**, below). So in this case, the collapsed section summary text will list both Team C and Team A.

Second: I don't need to select any boxes for the article to be restricted to all the author teams as the category is: it already carries the same restrictions.

Third: The checkboxes in the article editor instead allow you to **further refine** the author team restrictions.

If I make no selections, the article will only be editable by the author teams inherited from the category (in this case, the Team C and Team A teams). Those teams will be displayed in the summary text if the **Restrict to Teams** section is collapsed.

But if I do check one of these boxes, it will further restrict the article so that it is only editable by the team(s) I select. When checkboxes are selected in this way, the summary section will display only the selected teams.

So if I select "Team C" here, anyone in Team A will no longer be able to edit this article, though they'd still be able to edit other articles in the category. Only Team C will be listed in the summary text if the section is collapsed.

Remove author team restrictions

Last Modified on 10/02/2024 4:55 pm EDT

Removing author team restrictions depends on how the restriction has been set.

Author team restrictions can be set:

- Directly on an article itself, using the Restrict to Teams checkboxes
- Inherited from the category the article's within, no further refinements (no boxes checked in the article's **Restrict to Teams** section)
- Inherited from the category the article's within AND further refined/limited to a subset of those teams (boxes checked in the article's **Restrict to Teams** section)

Direct restrictions

Author team editing restrictions that have been added to the article directly (and aren't inherited from the category) can be removed by unchecking the team's checkbox in the **Restrict to Teams** section of the editor and saving.

Inherited restrictions, no refinements

If an article has inherited author team restrictions from the category, the only way to remove the author team restriction is to remove it from the category itself.

As long as no **Restrict to Teams** boxes have been explicitly checked in the article itself, removing from the category will totally remove the author team restriction from the article. If any boxes have been checked in that section for the article, see the next section.

Inherited restrictions with refinements

If an article has inherited author team restrictions from the category AND has boxes checked in the **Restrict to Teams** section, removing the restrictions is a little more complicated.

In this scenario, you'd need to remove the author team:

- From the category's **Restrict Editing to Teams** section
- From the article's **Restrict to Teams** section

Default author roles

Last Modified on 07/10/2024 1:04 pm EDT

KnowledgeOwl comes with two default author roles:

- **Editor:** can perform all actions in a knowledge base, including customizing any setting
- **Writer:** can perform any action related to creating and editing content; does not have access to customize settings

Here's a full breakdown of each role's permissions:

Permission	Editor	Writer
Create any type of new article: • From scratch • From a template • From any existing article • Content linked to an existing article	X	X
Edit articles that are in draft mode	X	X
Edit articles that are published	X	X
Create new versions of articles	X	X
Edit versions of articles	X	X
Delete versions of articles	X	X
Activate versions of articles	X	X
Publish articles that are in draft mode	X	X
Move / re-order articles	X	X
Archive articles	X	X
Delete articles	X	X
Edit articles in bulk	X	X
Create new categories	X	X
Edit categories	X	X
Move / re-order categories	X	X
Delete categories	X	X
Create new internal notes	X	X
Edit internal notes	X	X
Remove internal notes	X	X
Edit homepage content	X	X
Create new comments	X	X
Approve submitted comments	X	X
Delete submitted comments	X	X
Add glossary terms	X	X
Edit glossary terms	X	X
Delete glossary terms	X	X
Add snippets	X	X
Edit snippets	X	X
Delete snippets	X	X

Permission	Editor	Writer
Edit files	X	X
Delete files	X	X
Create file labels	X	X
Edit file labels	X	X
Delete file labels	X	X
Add existing tags to articles	X	X
Edit existing tags	X	X
Add new tags	X	X
Remove tags from articles	X	X
Delete tags	X	X
Create and manage exports - PDFs / HTML Zip	X	
Import content	X	
Update article ratings settings	X	
Update article favorites settings	X	
Update basic settings	X	
Update comment settings	X	
Update contact form settings	X	
Update PDF settings	X	
Update search settings, synonyms, and reindex search	X	
Update security settings	X	
Update style / theming	X	
Update subscription settings	X	
Update required reading settings	X	X
Update widget settings	X	
View Reporting > Dashboard	X	X
View Reporting > Contact Form	X	X
View Reporting > Widget	X	X
View Reporting > Comments	X	X
Reset individual article ratings	X	
Reset all article ratings	X	
Reset individual article view counts	X	
Reset all article view counts	X	
View required reading reports	X	X
Run Broken Links Report	X	X
Run Advanced Search	X	X
Update Customize Text	X	X

To further restrict what actions an author can perform, create a custom role.

Custom author roles

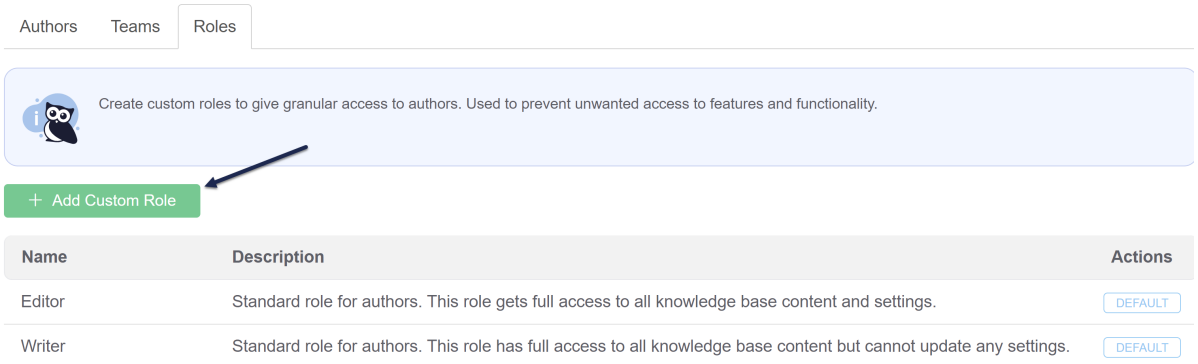
Last Modified on 07/10/2024 1:08 pm EDT

If you need to lock down author permissions, you can create custom author roles to control what actions authors can perform in your knowledge base.

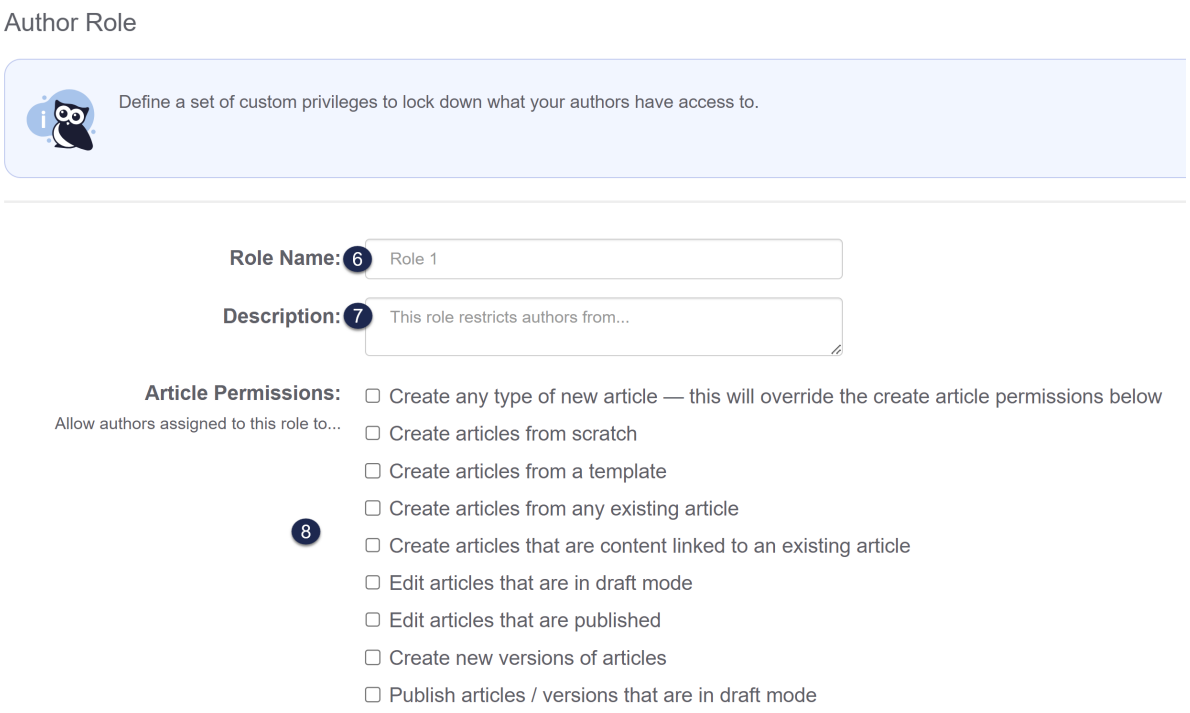
Authors with full account admin access can create custom roles.

To do so:

1. Select your **profile icon/name** in the upper right.
2. Select **Authors** from the dropdown to view the author details for your account.
3. Open the **Roles** tab.
4. Select the **+ Add Custom Role** button.



5. This will open an Author Role screen where you can define the custom role in more detail:



6. First, assign a **Role Name**. This is the name as it will appear in the list of roles, and will display as an option when you are assigning an authorr to this knowledge base. It should be descriptive but not too long.
7. Next, add a **Description**. Though optional, this description can provide more detail about what the role's permissions do or don't include. You may also want to provide guidance around when to use this role.
8. Finally, select the **Permissions** you'd like the role to have using the checkboxes in each section. See Available custom role permissions for a more detailed breakdown of these options.
9. Once you've finished assigning the appropriate permissions, click the **Save Role** button at the bottom of the screen.

Once you create a custom role, you can then assign authors to the role to further control what actions they can perform in your knowledge base.

Use cases

As Linus grows his content creating empire, he might want to have some authors who can create and edit draft articles but can't publish or delete them. These authors would mark something as Ready to Publish but an Editor or Content Reviewer might review it before officially publishing it. Linus creates a custom "Content Contributor" role and assigns authors to it.

Available custom role permissions

Last Modified on 07/10/2024 1:09 pm EDT

By default, a custom role has no permissions and you choose what each role should be able to do. Here are the categories of permissions available:

- **Article permissions**
  - Create any type of new article, or specify any of the four article types (create from scratch, copy existing article, create from template, or link/sync content to an existing article).
  - Edit draft articles
  - Edit published articles
  - Create new versions of articles
  - Edit versions of articles
  - Delete versions of articles
  - Activate versions of articles
  - Publish draft articles
  - Move or reorder articles
  - Archive articles
  - Delete articles
  - Edit articles in bulk (use the Bulk Edit link in Manage)
- **Category permissions**
  - Create new categories
  - Edit categories
  - Move or reorder categories
  - Delete categories
- **Internal note permissions**
  - Create new internal notes
  - Edit internal notes
  - Remove internal notes
- **Homepage permissions**
  - Edit homepage content
- **Comments permissions**
  - Create new comments
  - Approve submitted comments
  - Delete submitted comments
- **Glossary permissions**
  - Add glossary terms
  - Edit glossary terms
  - Delete glossary terms
- **Snippet permissions**
  - Add snippets
  - Edit snippets
  - Delete snippets
- **File library permissions**
  - Edit files
  - Delete files

    - Create file labels
    - Edit file labels
    - Delete file labels
- **Tag permissions**
    - Add existing tags to articles
    - Edit tags in the tag library
    - Add new tags
    - Remove tags from articles
    - Delete tags from the tag library
    - (Authors with the permission to edit tags and delete tags have the ability to merge tags)
- **Admin permissions**
    - Create and manage PDF and HTML exports
    - Import content
    - Update article ratings settings
    - Update article favorites settings
    - Update basic settings
    - Update comment settings
    - Update contact form settings
    - Update PDF settings
    - Update search settings, synonyms, and reindex search
    - Update security settings
    - Update style / theming
    - Update subscription settings
    - Update required reading settings
    - Update widget settings
- **Reporting permissions**
    - View Dashboard
    - View Contact Form
    - View Widget
    - View Comments
    - Reset individual article ratings
    - Reset all article ratings
    - Reset individual article view counts
    - Reset all article view counts
    - View required reading reports
- **Tools permissions**
    - Run Broken Links Report
    - Run Advanced Search
    - Update Customize Text

If you'd like to document/audit custom roles, you can use this Excel file: KnowledgeOwl Author Roles - Excel format

Readers overview

Last Modified on 05/29/2024 5:28 pm EDT

A reader is anyone who can view your knowledge base. You can have unlimited readers for your knowledge bases. You can also create Reader Groups to segment readers and show different content to different readers.

KnowledgeOwl authors with **Full Admin Access** or **Admin access to readers** admin rights can view and edit reader accounts.

You can view a complete list of all your readers:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.



Sample Readers page

Here's an orientation of the page and its functions:

1. The **Readers** tab displays a list of all your readers.
2. The **Groups** tab displays your reader groups. Here, you can create, edit, delete, and reorder your reader groups. You can also set any Auto-assign groups by email rules you'd like to use for those groups if you aren't using Single Sign-On (SSO).
3. The **Settings** tab displays the account-wide settings for readers, including setting password complexity, whether readers' passwords are admin managed or self-administered, set up self-administered reader options like sign-up and approval, customize the reader email templates (including welcome and password reset), and configure custom SMTP to send those emails from.
4. The **filter dropdown** allows you to select different Standard filters for your readers, and will display any Custom filters you've created. These filter selections are reflected in the Export Readers to CSV functionality, too. The app will remember the last filter you viewed. The Standard filters are:
    - **Active** (the initial default): shows all non-deleted readers in your account, regardless of login method

- **Pending Approval:** displays readers who have signed up for access to your knowledge base; only relevant for accounts using reader signups requiring approval. See Approve new reader signups for information on approving readers.
- **SSO Readers:** displays all readers who are designated as authenticating through a Single Sign-On (SSO) integration
- **Non-SSO Readers:** displays all readers not designated as authenticating through an SSO integration (passwords and group membership are managed within KnowledgeOwl directly)
- **Deleted:** will show you all the deleted readers in your account

5. Use the **Create new filter** button to create new custom filters.
6. Use the **Import Readers from Spreadsheet** button to import a spreadsheet to create multiple new reader accounts at once.
7. Use the **Add Single Reader** button to create a reader.
8. Use the **Search** to search within the selected filter, which will further refine the list of readers to match your search term.
9. Check the box next to a reader and click the **Edit** link to edit that reader's account. (You can also just click the reader's row in the table.)
10. Check the box next to multiple readers and click the **Bulk Edit** link to edit readers' group membership in bulk.
11. Check the box next to one or more readers with Pending Approval and click the **Approve** link to approve their access request(s).
12. Check the box next to one or more readers with Pending Approval and click the **Deny** link to deny their access request(s).
13. Check the box next to one or more readers and click the **Delete** link to delete those readers.
14. Use the **Export Readers to CSV** to export the current displayed list of readers to a CSV file. This can be useful for auditing who has access to which knowledge bases, and so forth.
15. Use the **Purge Deleted Readers** link to permanently wipe all record of Deleted reader accounts. Only Full Admin Access authors or authors with both the **Admin access to readers** and **Admin ability to purge readers** rights will see this option.
16. Use the **Readers per page** controls to change how many readers are displayed on each page of the table.
17. Use the **checkboxes** to the left of the reader accounts to make selections, or use the checkbox in the header row to select all readers on the current page / all in the current filter.
18. The **Login** column displays the reader's username/email. You can click to sort this alphabetically.
19. The **Name** column displays the reader's Last Name, First Name. You can click to sort this alphabetically.

20. The **Site Access** column displays the knowledge bases that this reader has access to.
21. The **Groups** column displays the reader groups this reader belongs to.
22. The **Last Activity** column shows the last time the reader was active in your knowledge base.

What's the difference between an author and a reader?

Last Modified on 05/29/2024 5:27 pm EDT

Authors are people who can create, edit, and manage your knowledge base content. They have access to app.knowledgeowl.com. You pay for the authors on your account. There are two main types of authors:

- **Full Admin authors:** Account administrators have access to everything in your account.
- **Non-admin authors:** Non-admins are granted permissions by the admins on a per knowledge base level. For each knowledge base, an author can be an editor, a writer, have no access, or have a custom role.
    - Editors have access to all settings on a knowledge base, including settings, security, and styles.
    - Writers can only create and edit content (categories and articles).
    - Authors with no access will not be able to view a knowledge base in the back-end.
    - Non-admin authors can be given access to Readers.

Readers are people who can view your knowledge base. They don't have access to app.knowledgeowl.com. You can have an unlimited number of readers on your account.

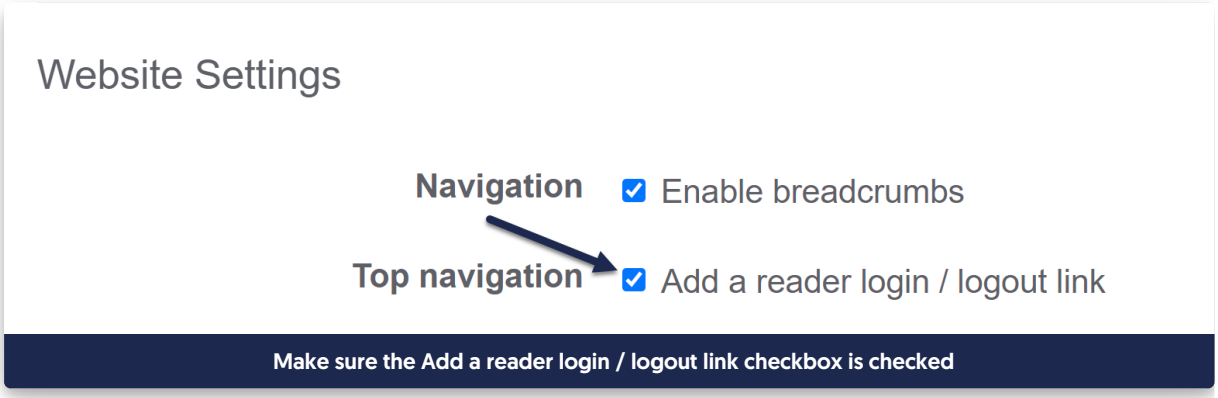
Enable reader logins

Last Modified on 05/29/2024 5:28 pm EDT

If you'd like to create and maintain readers directly within KnowledgeOwl (and you're not using SSO or remote authentication to create them), you'll need to take a few actions:

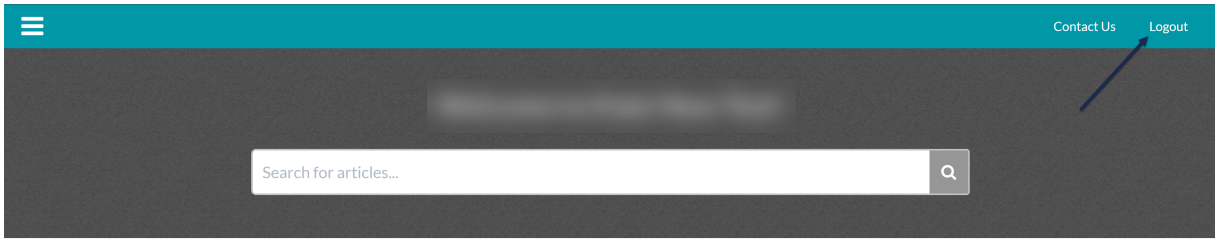
First, let's make sure you have a functioning reader login page, so your readers have some way to log in:

1. In **Settings** > **Basic**, go to the **Website Settings** section.
2. Be sure the box next to "Add a reader login / logout link" is checked.



Make sure the Add a reader login / logout link checkbox is checked

3. **Save** your changes.
4. In the top navigation, select **View KB**.
5. Look in the top navigation of your knowledge base. If you see a link that says **Logout** in the upper right, you can skip steps 6-14 here and jump to the next set of instructions below.



6. If you don't see a **Logout** link anywhere, head over to **Settings** > **Style**.
7. Below the preview pane, select the **Custom HTML** option.
8. To add the Reader Login/Logout link to your top navigation, select the **Top Navigation** dropdown next to **Custom HTML**.
9. Somewhere in this Top Navigation, add the Reader Login template merge code. These instructions will show you how to add it after the Contact Us link in the screenshot above, but you can add the template in different places if you'd rather.

10. Look for the div with the id="navbar-collapse".
11. Within that div, add a blank line after the contact template.
12. Copy this code and paste it onto that blank line: `<li>[template("login")]</li>`
13. Your code should now look like this:

```
<div class="navbar-collapse collapse" id="navbar-collapse">
    [template("slideout-right-toggle")]
    <ul class="nav navbar-nav navbar-right">
        <li>[template("searchbar")]</li>
        <li>[template("contact")]</li>
        <li>[template("login")]</li>
    </ul>
</div>
```

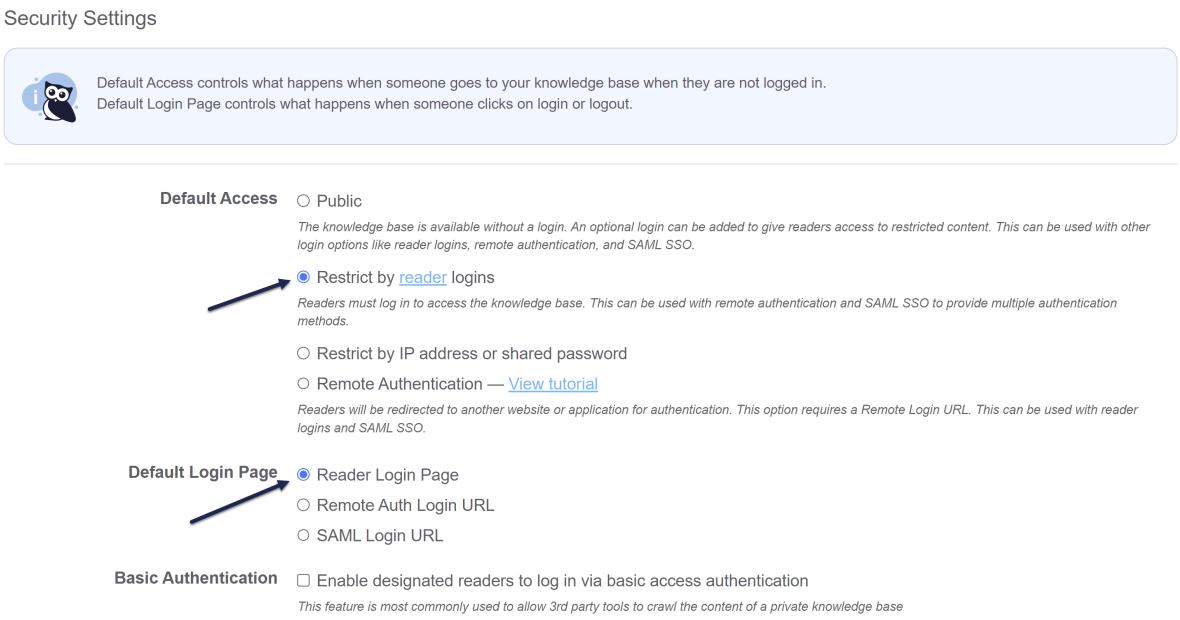
Sample top navigation code with reader login template

14. **Save** your changes.

If you're using your knowledge base for a mixture of public and private content, no further action is necessary.

If you'd like to restrict your knowledge base so everyone must log in before seeing content:

1. Go to **Settings > Security**
2. In Default Access, select the option to **Restrict to reader logins.**
3. In Default Login page, be sure the option for **Reader Login Page** is selected.



4. **Save** your changes.

Anyone trying to navigate to any page of your knowledge base who hasn't logged in will now be directed to the readerlogin page (which is your homepage URL with /readerlogin at the end of it).

Optional related features/next steps might include: customizing the text displayed in the Reader login form, adding Reader signups, Google log in for readers, configuring your Reader password security, customizing your Reader emails.

Create a reader

Last Modified on 05/29/2024 5:27 pm EDT

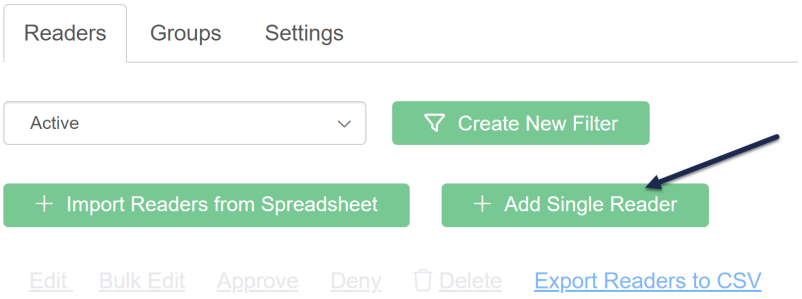
Readers are people who can log in and view your knowledge base. You can configure your knowledge base to allow readers to log in to view additional content or to require readers to log in to access all content.

You can assign readers to groups that have access to specified content. All categories and articles can be viewable by all readers or only by specific reader groups, which can be created in Readers > Groups.

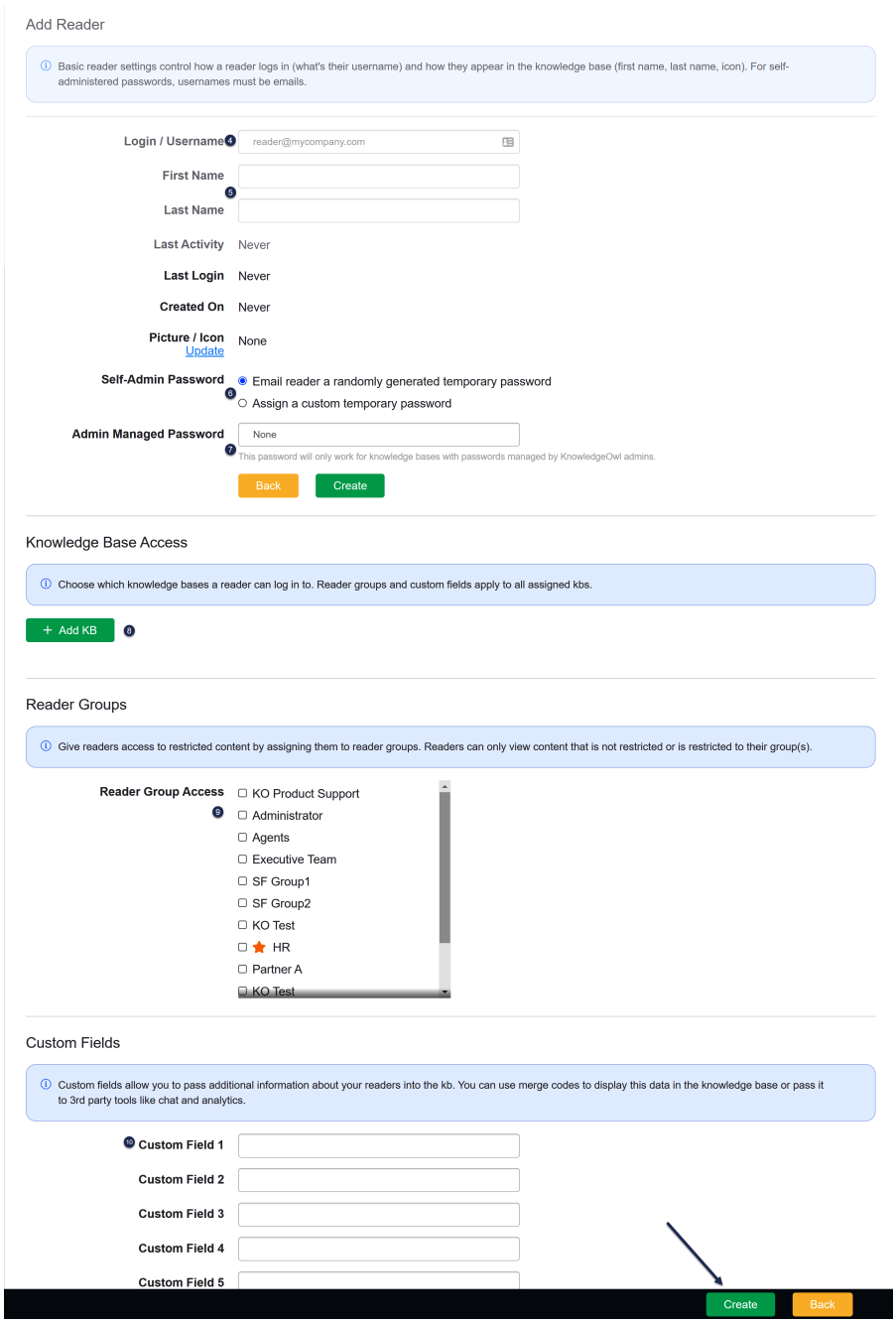
Only authors with either **Full Admin Access** or **Admin access to readers** can create new readers.

To create a reader:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Click the + **Add Single Reader** button.



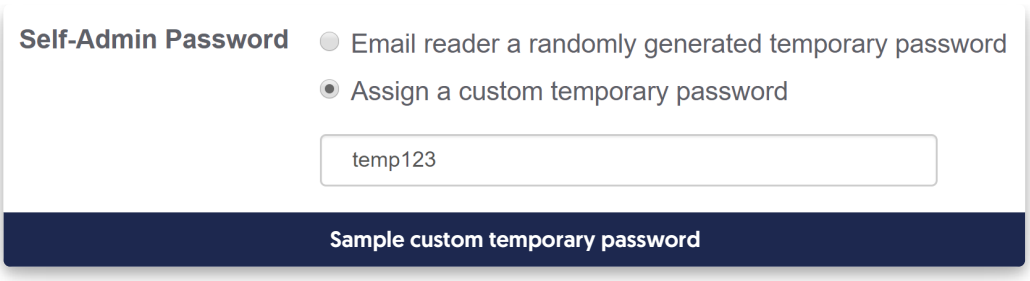
4. This opens the **Add Reader** screen:



5. Enter a **Login/Username.** This login / username needs to be unique.
6. **Optional:** add your reader's first and last names.
7. If your knowledge base uses self-administered reader passwords (the default), KnowledgeOwl automatically sends a welcome email with a temporary password.

   Not sure if you're using self-administered passwords? Check the **Readers > Settings** tab to confirm and see Set up password management for readers for more info.

   - Selecting the **Assign a custom temporary password** option lets you create a temporary password of your choice.

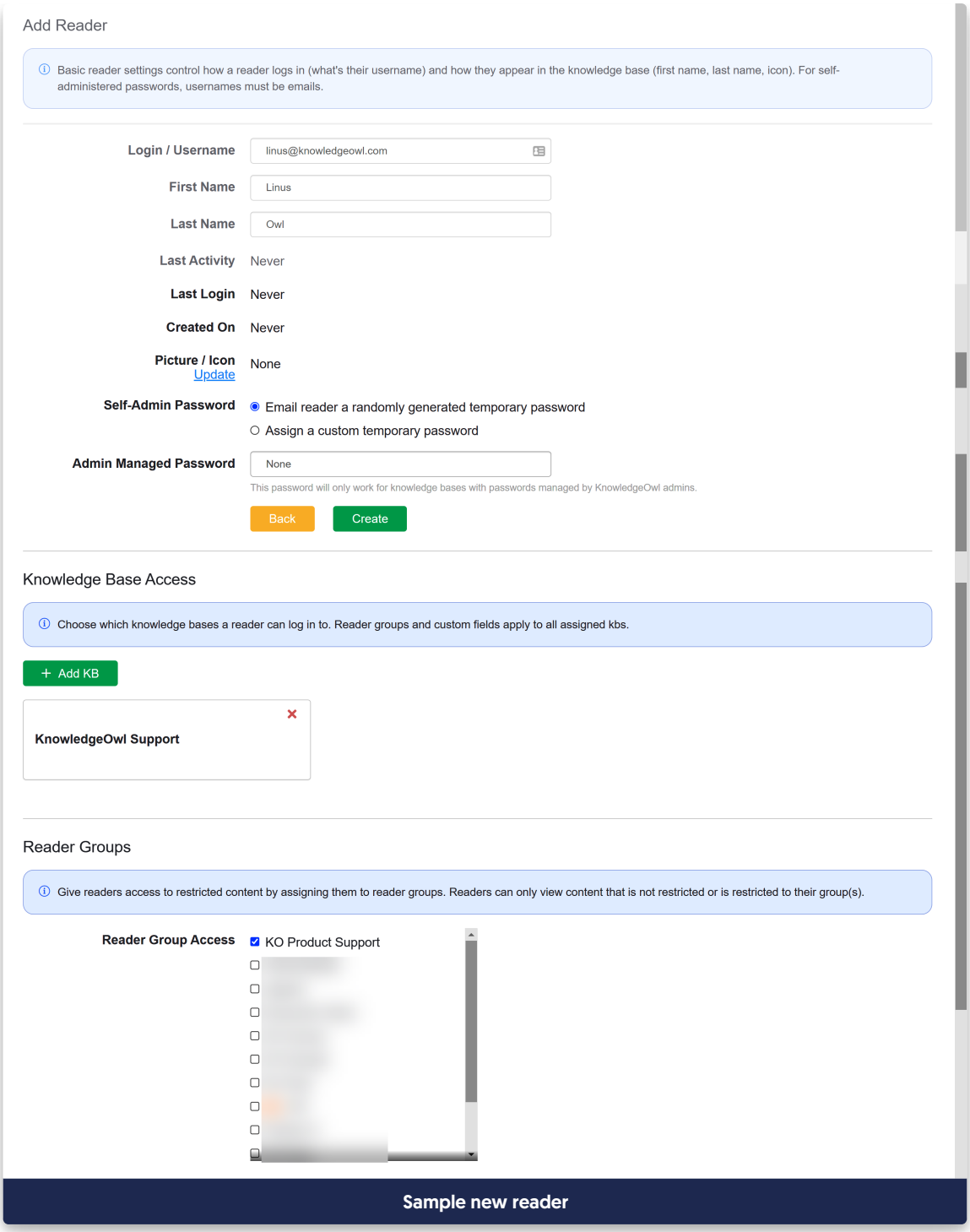


8. If you are using admin managed passwords, you will set up a **Password**.

> Not sure if you're using admin managed passwords? Check the **Readers > Settings** tab to confirm and see Set up password management for readers for more info.

9. In **Knowledge Base Access**, add the knowledge bases this reader should access by clicking the **+ Add KB** button and selecting the knowledge base. Repeat for all appropriate knowledge bases.
10. Optional: Use the **Reader Group Access** checkboxes to assign this reader to Reader Groups.
11. Optional: If you are using custom reader fields, complete the custom fields you're using with the appropriate info.
12. Click the **Create** button to create the new reader.

A completed Add Reader form for a self-administered password, with one reader group, no custom fields, and one knowledge base might look like this:


Add Reader
Basic reader settings control how a reader logs in (what's their username) and how they appear in the knowledge base (first name, last name, icon). For self-administered passwords, usernames must be emails.
Login / Username
linus@knowledgeowl.com
First Name
Linus
Last Name
Owl
Last Activity
Never
Last Login
Never
Created On
Never
Picture / Icon
Update
None
Self-Admin Password
Email reader a randomly generated temporary password
Assign a custom temporary password
Admin Managed Password
None
This password will only work for knowledge bases with passwords managed by KnowledgeOwl admins.
Back
Create
Knowledge Base Access
Choose which knowledge bases a reader can log in to. Reader groups and custom fields apply to all assigned kbs.
Add KB
KnowledgeOwl Support
Reader Groups
Give readers access to restricted content by assigning them to reader groups. Readers can only view content that is not restricted or is restricted to their group(s).
Reader Group Access
KO Product Support
Sample new reader

Create readers in bulk

Last Modified on 05/29/2024 5:27 pm EDT

You can create and/or update multiple reader accounts at once by uploading a CSV spreadsheet.



As soon as your import completes, your readers will receive a Welcome Email with login instructions, so if you're going to test the import, don't use real readers' email addresses!

Bulk import/update overview

You'll upload a .csv file containing all of the readers you want to import or update. The importer can:

- Delete all existing readers (this will remove all current accounts and replace them with the accounts in the spreadsheet)
- Skip existing readers
- Update existing readers (if it matches the email address to a current reader account, it will update all the additional information for the reader with what's in the spreadsheet, but leave their password and email address untouched)



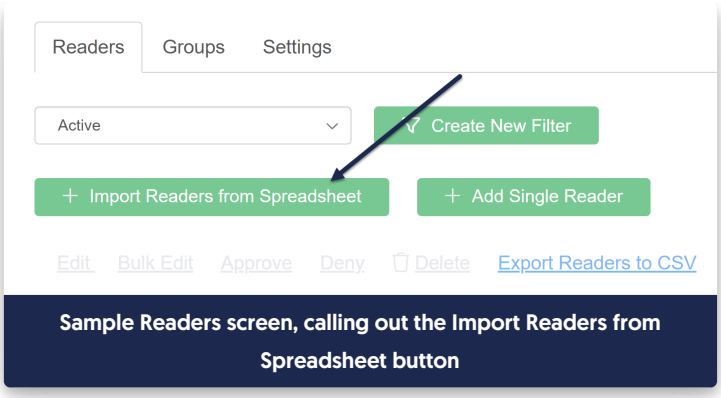
If you use Single Sign-On for your reader accounts:

The bulk importer **will not compare or update existing SSO-managed reader accounts** in an import/update situation, and it **cannot create new SSO-managed accounts.** To update those accounts, either contact your SSO administrator to adjust the details on the account or update the KB Access options for readers individually. Bulk importing a .csv file when all your readers are SSO-managed will create duplicate KO-managed reader accounts. Don't do this!

Getting a template CSV

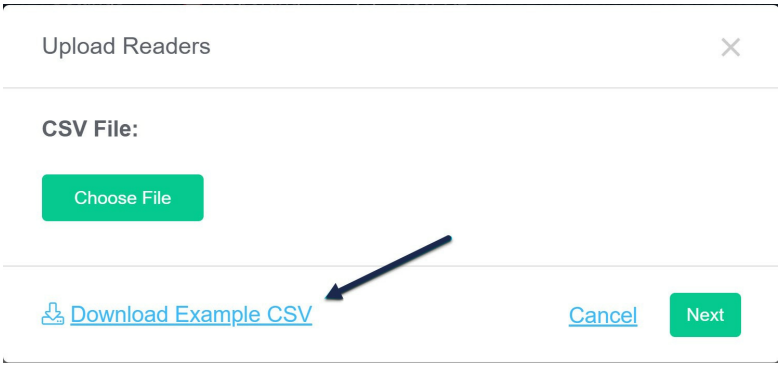
You can download a sample CSV file to use as a template for your bulk import:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Click the **Import Readers from Spreadsheet** button at the top.



Sample Readers screen, calling out the Import Readers from Spreadsheet button

4. This will open a pop-up where you an upload your CSV file. Click the link on the lower left to **Download Example CSV**.



5. This will start a download of a sample CSV file (it will also include custom fields):

	A	B	C	D	E	F
1	Email / Username (login)	First Name	Last Name	Password (leave blank for self-administered passwords)	Groups (optional)	Help Sites (optional)
2	User1@email.com	User	User	temp1	Group1,Group2	My Knowledge Base 1,My Knowledge Base 2
3						
4						
5						
6						
7						

Adding data to your CSV

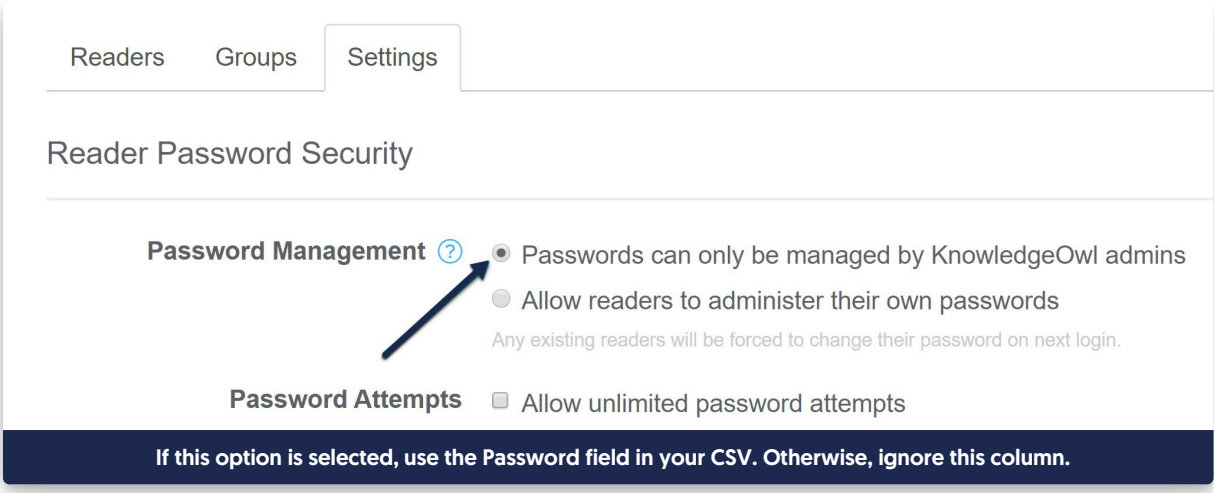
Whether you use our template or your own CSV file, as you fill out the CSV, you'll enter one row for each reader account you wish to create. For each reader, you'll assign an email (to be used as their username), and first and last name. You can assign all readers in a CSV to the same set of groups and knowledge bases in the import options for the upload, or you can assign specific readers to different groups and knowledge bases using separate fields in your CSV.

Use comma-separated lists (with no spaces after the comma) for fields where you want to assign the reader to more than one option (such as Groups, Help Sites, etc.).

See more detail in the following list of CSV fields and the sample import below:

- **Email / Username (login):** This is the email address the reader will use to login. It needs to be unique. Their welcome email will be sent to this address once the upload is complete.
- **First Name:** The reader's first name.
- **Last Name:** The reader's last name.
- ***Password (optional):*** You should only use this field if you are using admin-managed passwords for readers. (You can confirm this by going to **Readers > Settings** and reviewing the **Password Management** option selected. If "Passwords can only be managed by KnowledgeOwl admins" is selected, use this

field. Otherwise, ignore it.)



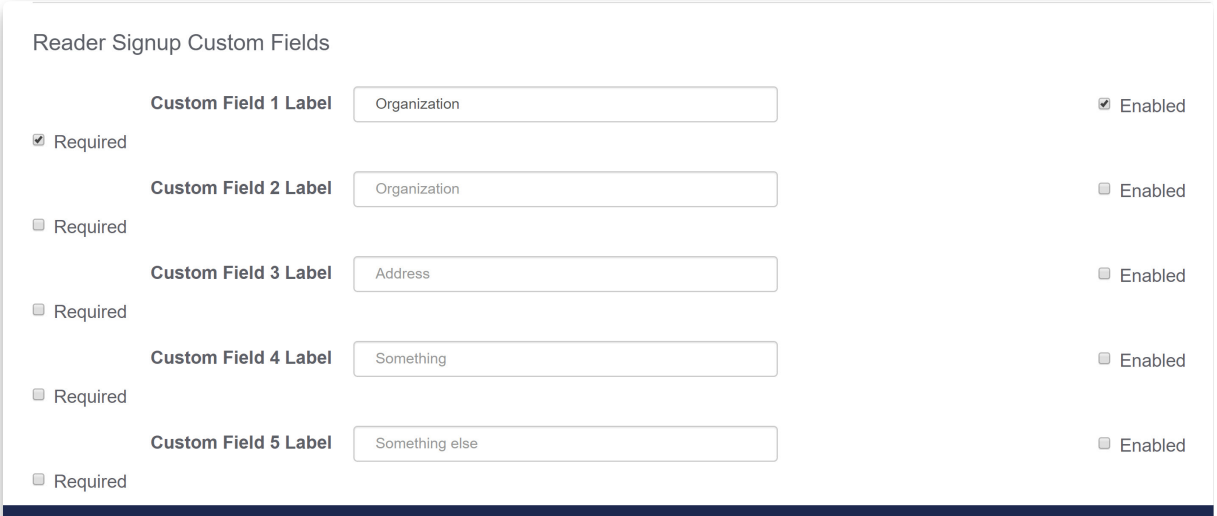
If this option is selected, use the Password field in your CSV. Otherwise, ignore this column.

- *Groups (optional):* You only need to use this field if you are assigning different readers in this CSV to different groups. (If you do not use reader groups, or don't want to assign any readers to groups, or are assigning all readers in this CSV to the same group(s), you can ignore this field.) If you are assigning individual readers in the CSV to one or more reader groups, use a comma-separated list of group names with no spaces after the commas (example: Administration,Support will assign the reader to both the Administration and Support reader groups).



You cannot create new groups here; you must reference existing groups.

- *Help Sites (optional):* If you have multiple knowledge bases and want to assign readers in this spreadsheet to different knowledge bases, use this column. (If you only have one knowledge base, or you are assigning all readers in this spreadsheet to the same knowledge base(s), you can ignore this column.) The knowledge base name entered here must match what you see in the **Knowledge base name** field in **Settings > Basic**. To assign a single reader to multiple knowledge bases, use a comma-separated list with no spaces after the commas (example: "KO Product Docs,KO Blog" will assign the reader to the KO Product Docs knowledge base and the KO Blog knowledge base).
- *Custom Field 1-5 (optional):* Use these fields only if you have Custom Fields in your Reader Signup form (visible in **Readers > Settings**). Match the Custom Field heading to the custom field(s) you're using, and enter appropriate values.



Reader Signup Custom Fields

Here's a sample of a saved CSV ready for upload:

	A	B	C	D	E	F	G	H
1	Email / Username (login)	First Name	Last Name	Password (leave blank for self-administered passwords)	Groups (optional)	Help Sites (optional)	Organization	Custom Field 2 (optional)
2	linus@knowledgeowl.com	Linus	Owl		Support	KO Product Docs,KO Blog	KnowledgeOwl	
3	pacino@knowledgeowl.com	Owl	Pacino		Developers,Support	KO Product Docs,KO API Docs	KnowledgeOwl	
4	owlbert@knowledgeowl.com	Owlbert	Einstein			KO Product Docs	KnowledgeOwl	
5	jimmy@knowledgeowl.com	Jimmy	Tallon		Developers	KO API Docs	KnowledgeOwl	
6	owlbus@owlette.com	Owlbus	Dumbledore		Partners	KO Product Docs	Owlette	
7	capone@owlette.com	Owl	Capone		Partners	KO Product Docs	Owlette	
8								

Sample reader CSV, ready for import

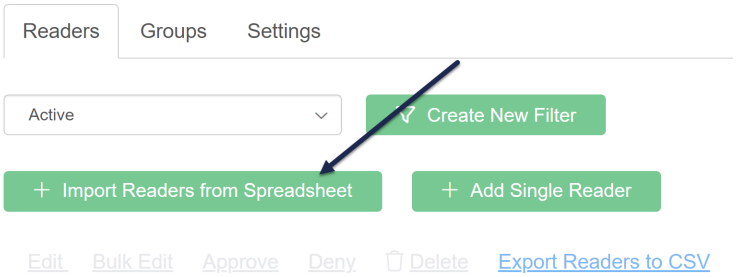
This will create 6 new readers:

- **Linus Owl**: will receive a randomly-generated password, be assigned to the Support group, and will gain access to the KO Product Docs and KO Blog knowledge bases. Our custom Organization field marks this reader as being part of KnowledgeOwl.
- **Owl Pacino**: will receive a randomly-generated password, be assigned to the Developers and Support groups, and will gain access to the KO Product Docs and KO API Docs knowledge bases. Our custom Organization field marks this reader as being part of KnowledgeOwl.
- **Owlbert Einstein**: will receive a randomly-generated password, not be assigned to any groups, and will gain access to only the KO Product Docs knowledge base. Our custom Organization field marks this reader as being part of KnowledgeOwl.
- **Jimmy Tallon**: will receive a randomly-generated password, be assigned to the Developers group, and will gain access to only the KO API Docs knowledge base. Our custom Organization field marks this reader as being part of KnowledgeOwl.
- **Owlbus Dumbledore** and **Owl Capone**: will receive a randomly-generated password, be assigned to the Partners group, and will gain access to only the KO Product Docs knowledge base. Our custom Organization field marks both readers as belonging to Owlette.

Uploading your CSV

Once you have your CSV created, return to the **Readers** page to upload it and create your new reader accounts.

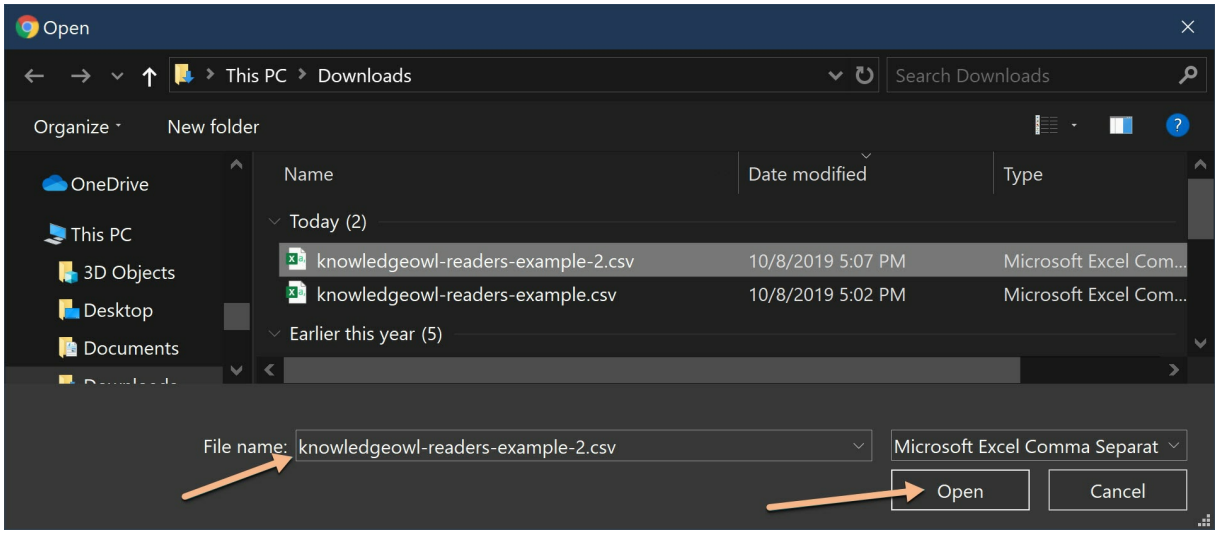
1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Click on the **+ Import Readers from Spreadsheet** button.



4. In the **Upload Readers** pop-up, click the **Choose File** button.



5. **This will open a file browsing window; navigate to the CSV file you've saved, select it, and click Open. (Note: your screen may look different depending on your browser, operating system, and display settings.)**

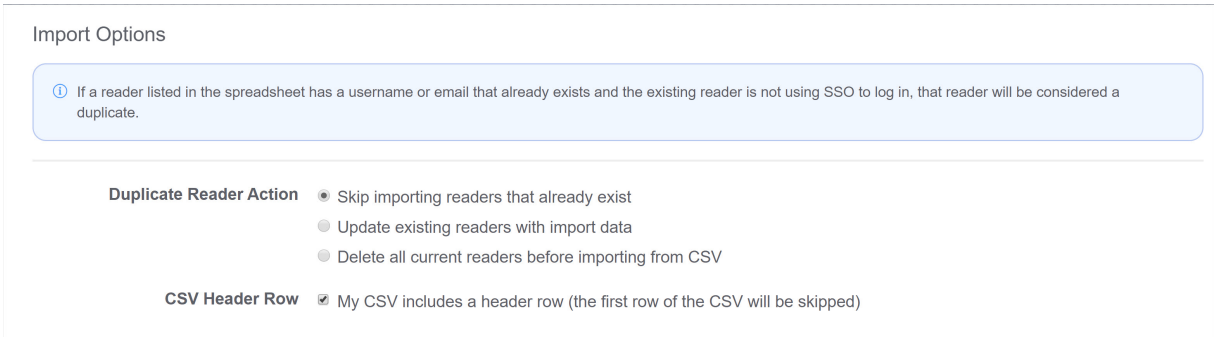


6. **Confirm that the CSV file name displayed is the one you meant to upload. If it's incorrect, click Choose File and repeat the previous step. Once it's correct, click Next.**



7. **This will take you to the reader Import Options screen. Here, you'll decide what to do if your spreadsheet contains readers who already exist, map the columns in your CSV to the appropriate fields in KnowledgeOwl, and/or assign the same groups or knowledge bases to all readers in the CSV.**

8. **The top two options set the overall way the import will be handled.**

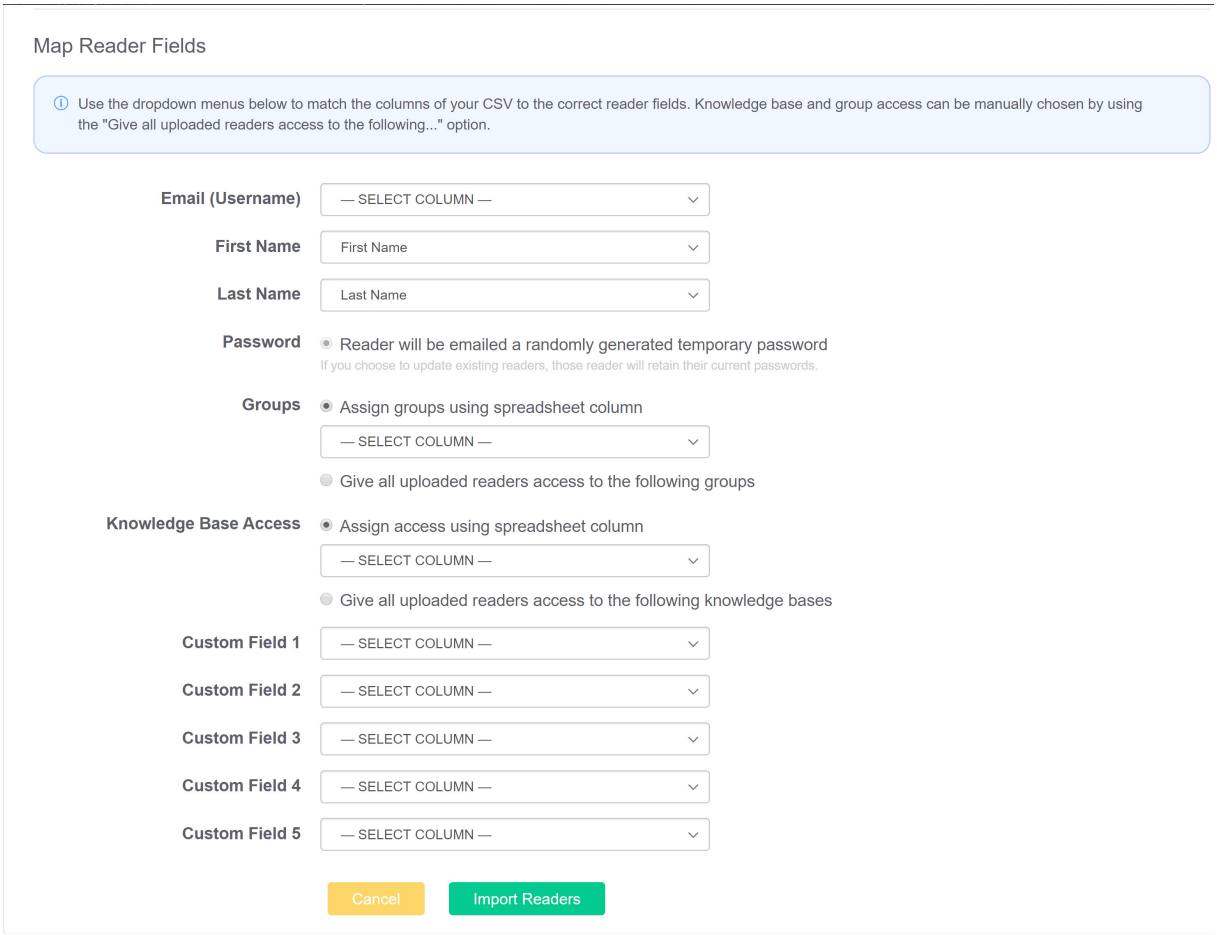


- **Duplicate Reader Action:** As part of the import, we'll check to be sure that the email address you're adding doesn't already exist. If it does already exist, this setting tells us what to do with it. The options are:
  - **Skip importing readers that already exist**: Any email address in the CSV that already exists in your account will be ignored completely.
  - **Update existing readers with import data:** For email addresses found in the CSV that already exist in your account, all related fields will be updated. This will overwrite any existing groups, knowledge base access, and so on for that reader.
  - **Delete all current readers before importing from CSV:** This will delete all existing readers and use the CSV to create all reader accounts fresh. Only use this option if you want only the readers in the CSV to exist in your account.

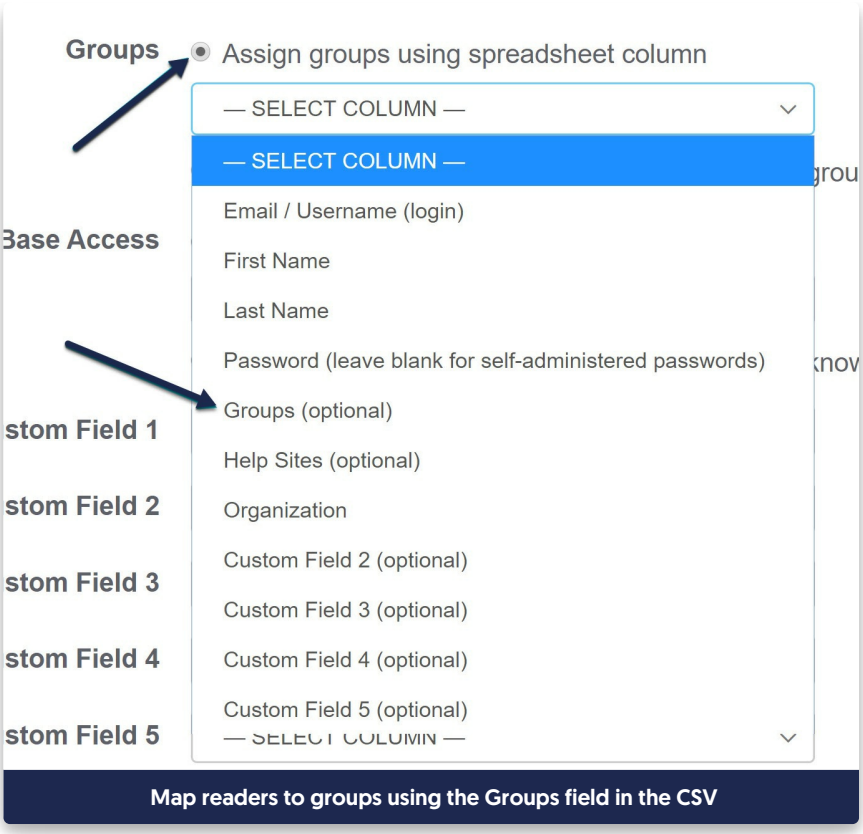
    Note: This Duplicate Reader Action ignores SSO-created and -maintained reader accounts. If you're using SSO accounts, do not try to update or import them using this tool.

- **CSV Header Row:** If you've used our sample CSV or created your own using your own headers, be sure this box is checked so the importer ignores the header row.

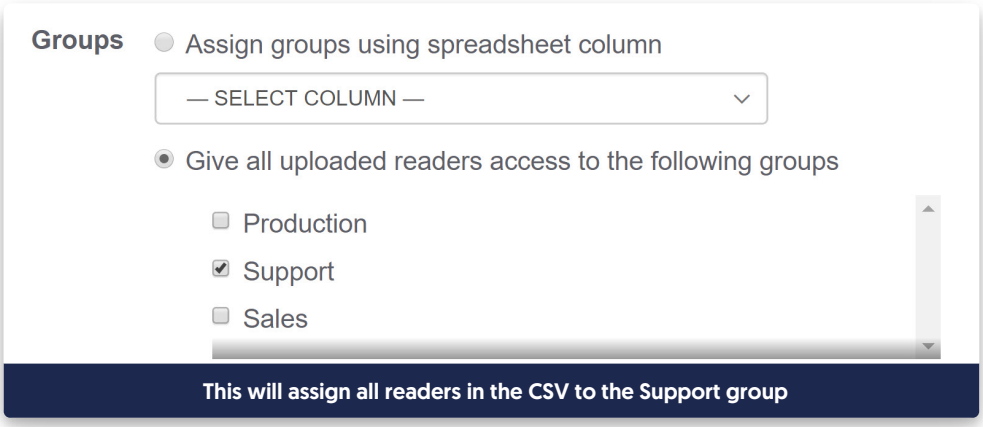
9. The **Map Reader Fields** section will let you map the fields in your CSV file to the corresponding fields in KnowledgeOwl using the provided dropdowns. It will auto-select titles that match exactly, but we recommend reviewing all of these fields to be sure they're importing to the correct fields.



- **Email (Username)**: map this to the column containing your reader's email addresses
- **First Name**: map this to the column containing your reader's first name
- **Last Name**: map this to the column containing your reader's last name.
- **Password**: this option will be unselectable if you don't have admin-managed passwords. If you do use admin-managed passwords, you'll have a dropdown to map this field to the password field in your CSV.
- **Groups**: If you have a column designating readers' groups, use the **Assign groups using spreadsheet column** setting and the dropdown below it to map that field.



If you didn't need the Groups column in your CSV because you are assigning all readers in this CSV to specific groups, use the Give all uploaded readers access to the following groups option and select the groups you want to assign these readers to.

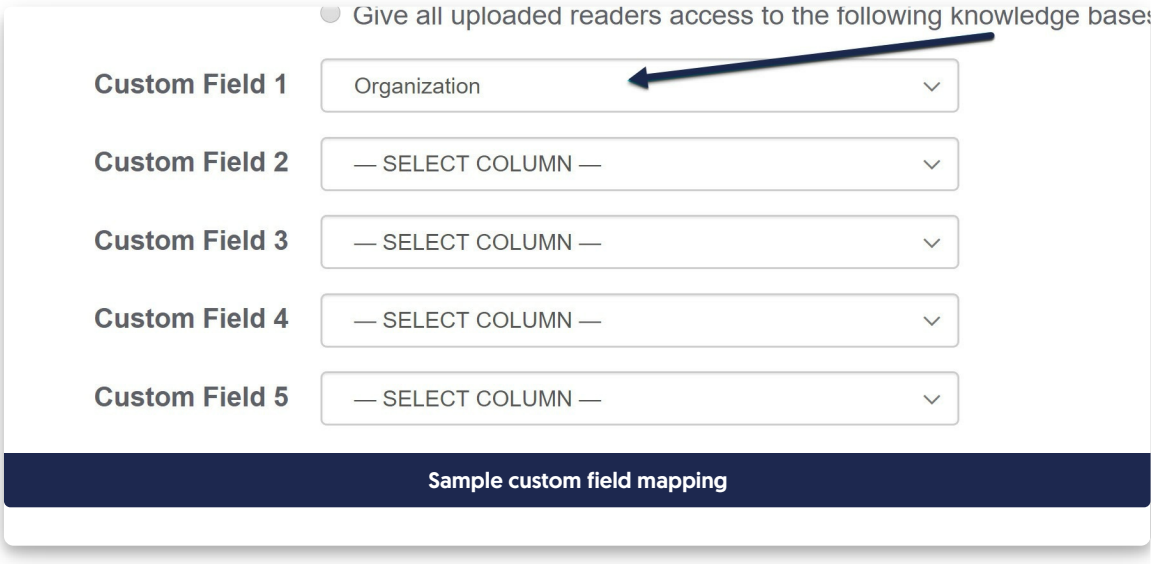


- **Knowledge Base Access: If you have a column designating reader's knowledge base access (the Help Sites column in our template), use the Assign access using spreadsheet column setting and the dropdown below it to map that field.**

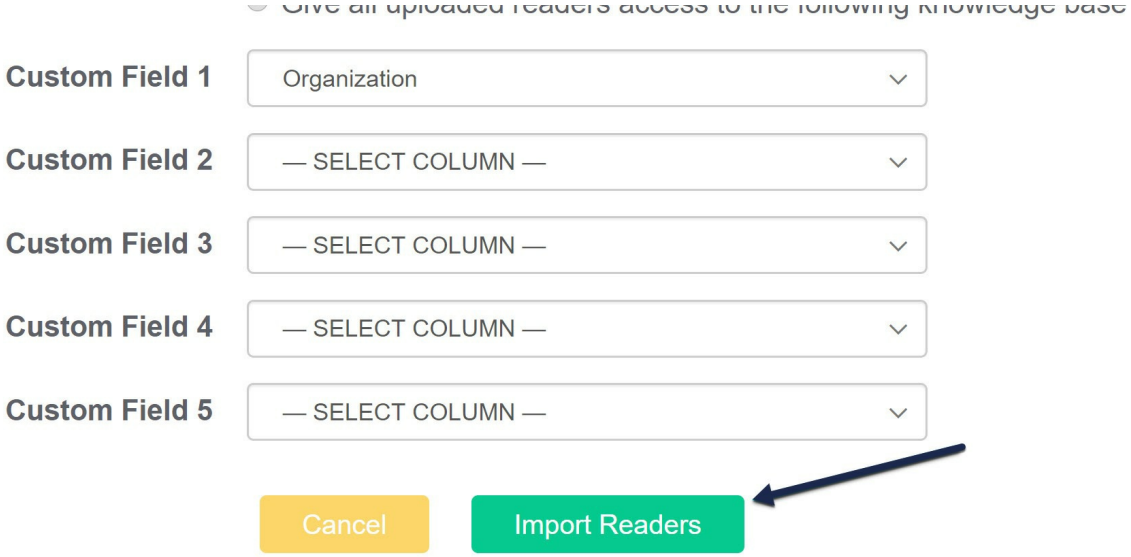


If you want to assign all readers in the CSV to the same knowledge base(s), use the Give all uploaded readers access to the following knowledge bases option and select the knowledge bases you want to assign these readers to.

- **Custom Fields 1-5:** If you use custom reader signup fields, be sure to map the custom fields in your spreadsheet to these custom fields. If you don't use custom fields at all, you can ignore this section. In our example, we had a custom field for "Organization" but no other custom fields, so that would look like this:

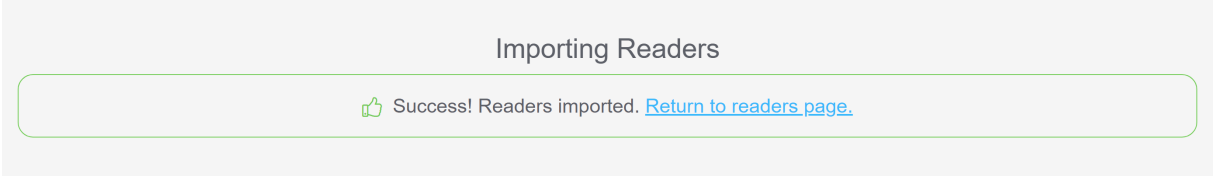


10. Once you have finished your field mappings, click **Import Readers** to complete your import.



11. While the import processes, you'll be taken to the **Import Readers** screen, which will display a progress bar.

12. Once the import completes, you'll see a confirmation message:



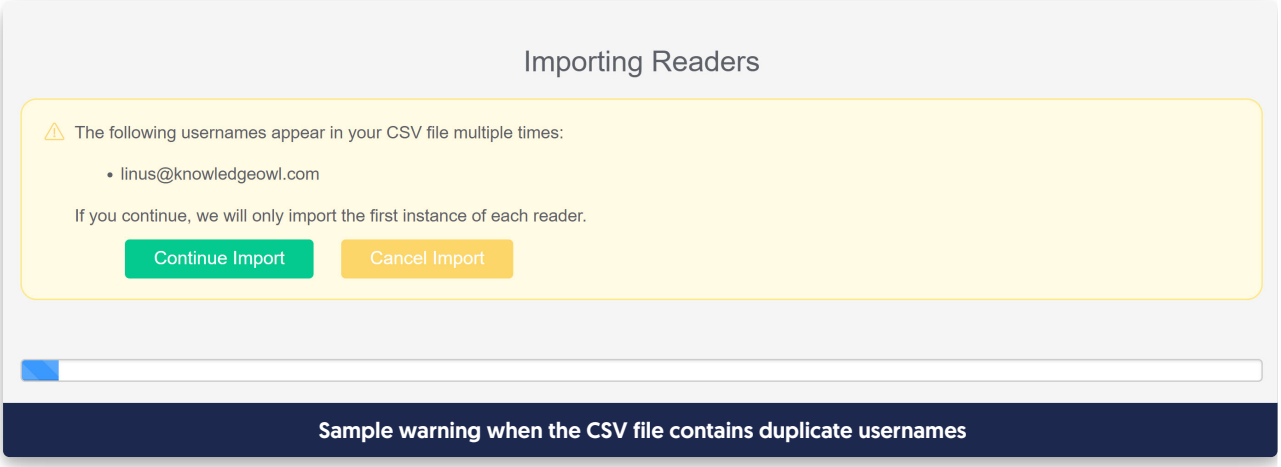
13. Click the **Return to readers page** link to return to the readers page and see your new readers.

As soon as the import completes, your readers will receive a welcome email. Existing readers that were

skipped will not receive an email. Readers whose accounts were updated will only receive a welcome email if they were given access to a knowledge base they haven't accessed before.

Troubleshooting reader imports

The Reader Import Options settings will handle when an existing reader matches the username you've included in your reader import file. But if the CSV file you're trying to import contains the same username more than once, you'll see an error as the import is being processed. It will look something like this, and will include a list of each duplicate username:



Sample warning when the CSV file contains duplicate usernames

If you get this warning and you click **Continue Import**, it will use the data from the **first** time the duplicate username appears in the spreadsheet.

If you click **Cancel Import**, it will cancel the import and you can open your CSV, remove the duplicate, re-save the file, and begin the import again.

Does capitalization matter in usernames/email addresses?

The bulk reader import tool strips out capitalization in the username/email address, for consistency. (Individually-created readers' usernames will also be set to lower case.)

Do I need to worry about trailing spaces at the end of email addresses or names?

No. The bulk importer will automatically trim trailing spaces from email addresses, first name, and last name. (For email addresses, it will trim them *before* it does the check for duplicate/existing readers.)

Will the bulk import tool check for invalid email addresses?

No. It will import the email address/username as you have it in the CSV. Be sure to review your CSV to be sure the email addresses you're using are correct and valid.

What if I use a group name that doesn't exist?

The bulk import tool will not throw an error if you reference groups that don't exist. It will just skip that group.

For example, let's say one of the rows in my spreadsheet looks like this:

	A	B	C	D	E	F	G
1	Email / Username (login)	First Name	Last Name	Password	Groups (o	Help Sites (optional)	Organization
2	linus@knowledgeowl.com	Owlbus	Dumbledore		Partners	KO Product Docs	Owlette
3							

If the group called "Partners" doesn't exist, this reader will be created and assigned to KO Product Docs, but they won't be assigned to any reader groups.

Search for readers

Last Modified on 05/29/2024 5:28 pm EDT

In **Readers**, you can search within the current filter using the search box in the upper right.

You can search using:

- Part of the email address (such as the domain or the portion before the @ symbol)
- Full email address
- Any portion of First Name
- Any portion of Last Name
- First and Last Name (two words separated by a space are interpreted as FirstName LastName, such as Linus Owl)
- Reader's KnowledgeOwl ID number

Create a custom reader filter

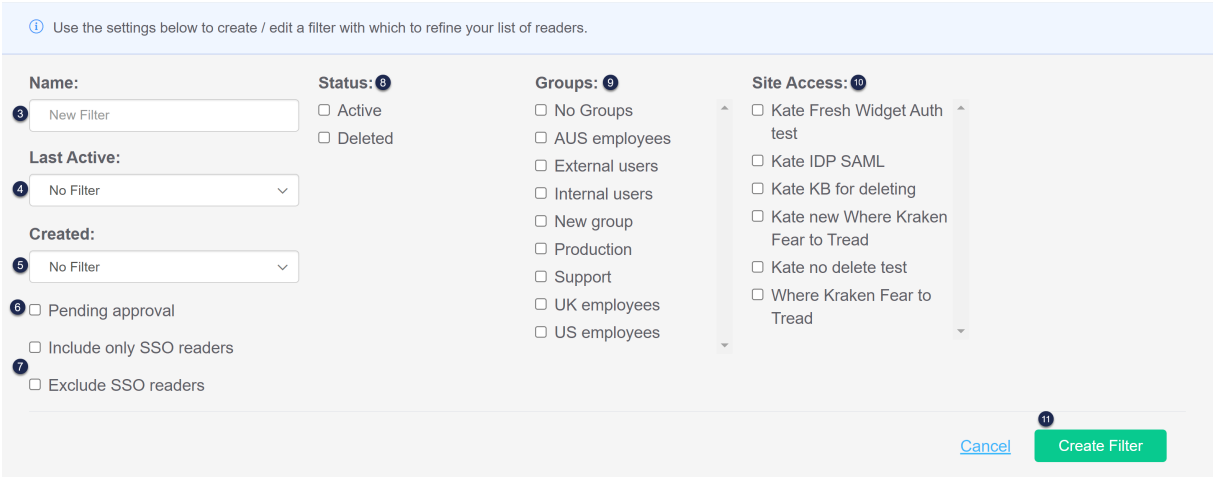
Last Modified on 05/29/2024 5:27 pm EDT

In addition to the five Standard filters on the Readers page, you can also create custom filters. These can be useful for auditing or reporting purposes.

Authors must have the **Full Admin Access** or **Access to readers permissions** to view this page and create custom filters.

To create a custom filter:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Click the **Create New Filter** button to create a new custom filter. This will open a menu where you can configure the custom filter.



4. **Name (required):** This is the name that will be displayed in the filter dropdown.
5. **Last Active** (optional): This dropdown lets you filter by the date/time stamps in the Last Activity column. The options include
    - "Since xxx" filters, which will show you readers who have been active since the date you select
    - "Prior to xxx" filters, which will show you readers who were active before the selected date
    - "Custom" filters, which allow you to set specific Start and End Dates
6. **Created** (optional): This dropdown lets you filter by the date the reader's account was created. The options match those for the Last Active filter above.
7. **Pending approval** checkbox (optional): Check this box to view only reader accounts that are pending

approval. Only relevant if you are using reader signups and require administrator approval for sign-ups.

8. **Include only SSO readers** checkbox and **Exclude SSO readers** checkbox (both optional): These two checkboxes allow you to set the filter to include only readers logging in through SSO (Include only SSO readers), or to show all readers who are not logging in through SSO (Exclude SSO readers).

9. **Status** (optional, defaults to Active only): You can choose whether to display Active readers, Deleted readers, or both.

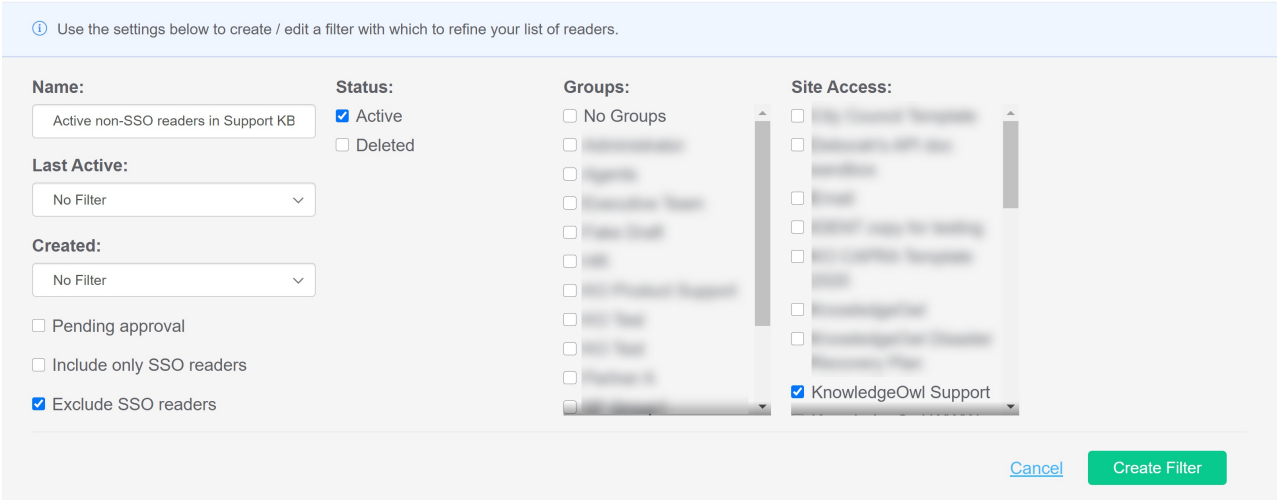
10. **Groups** (optional): Check the boxes here to view readers who belong to specific reader groups.
    - The **No Groups** checkbox will filter to display only readers who are assigned to no groups at all.

11. **Site access** (optional): Check the boxes here to view only the readers who are assigned to specific knowledge bases.

12. Click the **Create Filter** button to finish creating the filter, or hit **Cancel** to close the filter without saving.

13. Once you create a custom filter, it will appear in the filter dropdown, alphabetically listed under the **Custom** subheading.

Here's a sample filter which will display all active/non-deleted readers who are not logging in through SSO and have access to the KnowledgeOwl support knowledge base:

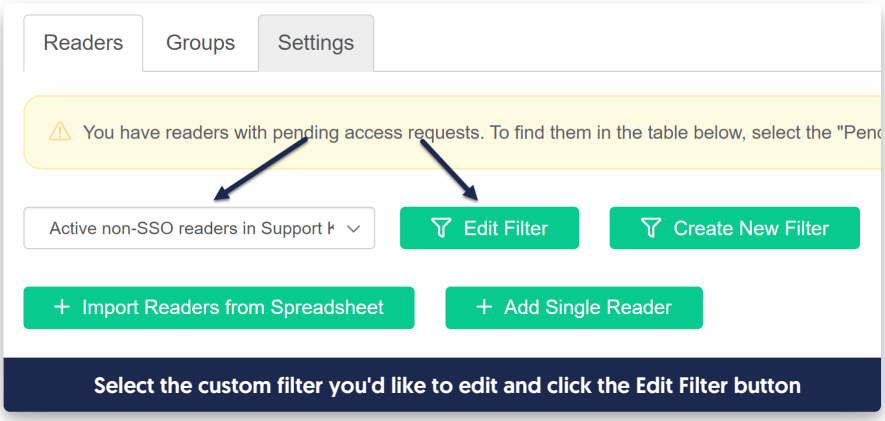


Edit a custom reader filter

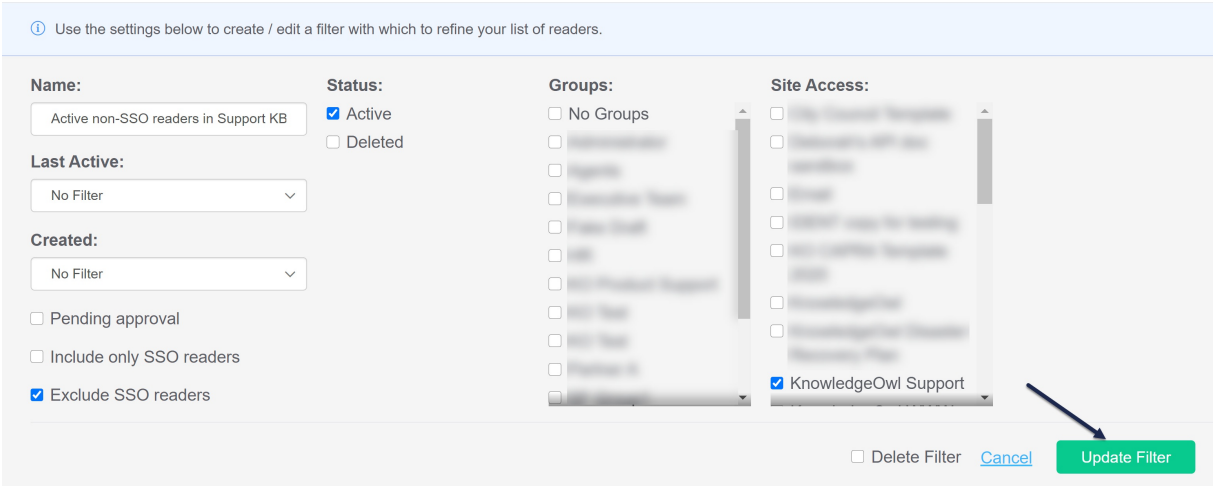
Last Modified on 05/29/2024 5:28 pm EDT

To edit a custom reader filter:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Open the filter dropdown in the upper left, and select the filter you'd like to edit.
4. Click the **Edit Filter** button to the right of the filter dropdown.



5. Make the changes to the filter you'd like.
6. Click the **Update Filter** button in the lower right to save your changes.

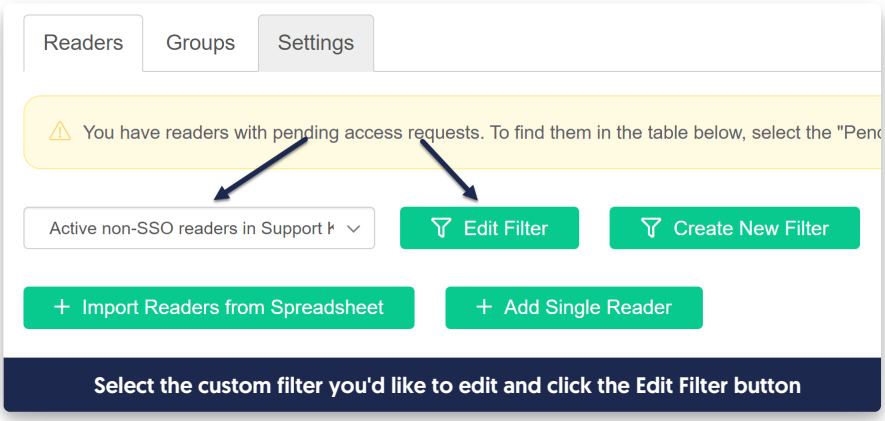


Delete a custom reader filter

Last Modified on 05/29/2024 5:28 pm EDT

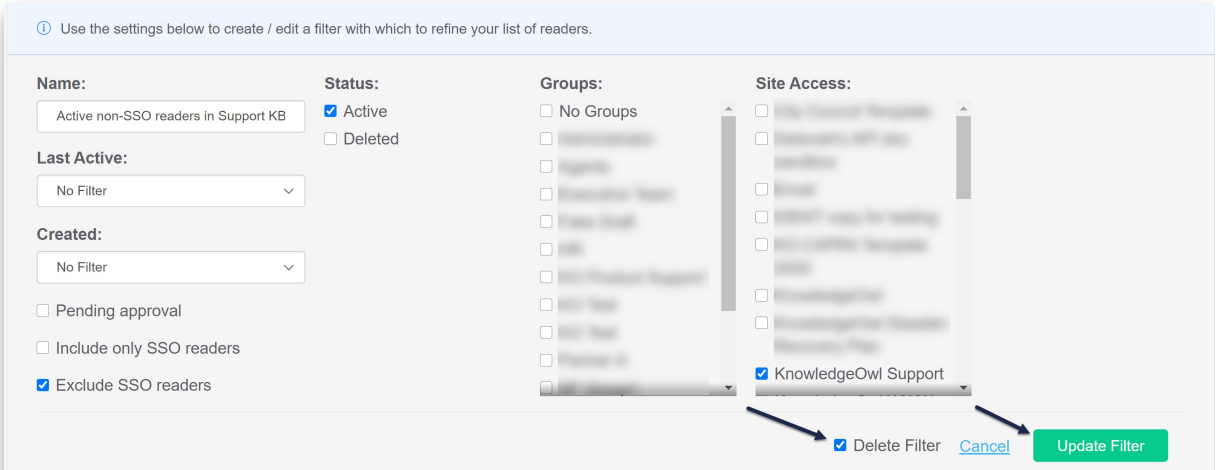
If you no longer need a custom filter, you can delete it. To delete a custom reader filter:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Open the filter dropdown in the upper left, and select the filter you'd like to delete.
4. Click the **Edit Filter** button to the right of the filter dropdown.



Select the custom filter you'd like to edit and click the Edit Filter button

5. Check the **Delete Filter** checkbox in the lower right.
6. Click the **Update Filter** button in the lower right to save your changes.



Check the Delete Filter box and click Update Filter

Edit readers in bulk

Last Modified on 05/29/2024 5:27 pm EDT

While you can edit individual readers by clicking on their name in the Readers list, sometimes it makes more sense to edit a group of readers. This is what the **Bulk Edit** option is for. Bulk Edit allows you to select multiple readers and:

- Change their status (from Active to Deleted, or from Deleted to Active)
- Add to their reader groups
- Replace their reader groups with new groups
- Remove all group membership
- Add to their knowledge base site access
- Replace their knowledge base site access
- Remove all knowledge base site access

If you are adding or replacing knowledge base site access, you can also choose whether to send a new welcome email to the reader or not.

Bulk edit can be incredibly useful if:

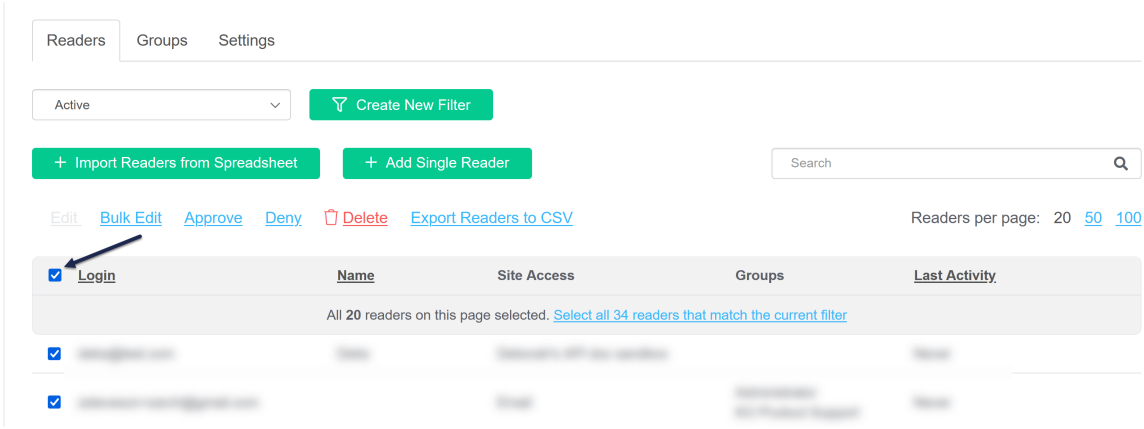
- You've recently created a new knowledge base and you'd like to add existing readers to it
- You've recently created new KO-only reader groups and you'd like to add existing readers to these groups
- You want to remove access to a reader group or knowledge base without deleting it outright
- You'd like to delete a bunch of readers
- You'd like to recover a bunch of deleted readers



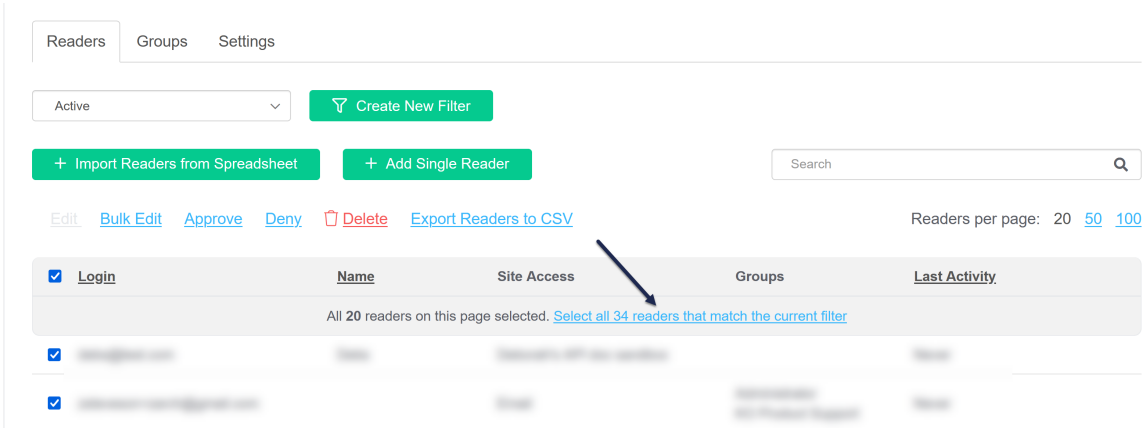
These steps are for bulk editing status, reader group, and knowledge base access of readers. If you'd like to approve or deny readers, see Approve or deny multiple readers.

To complete a bulk edit of readers:

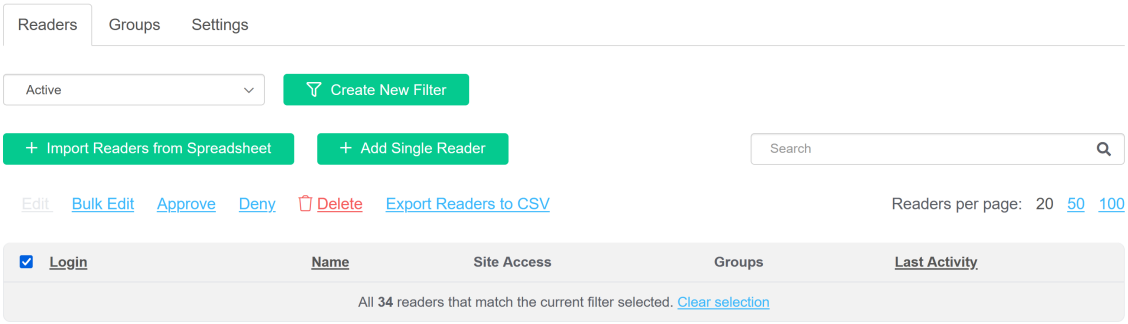
1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Use the checkboxes to select the readers you'd like to bulk edit. You can use the standard filters or a custom reader filter by themselves or with search to find the readers you need.
    a. You can also select all readers on the page by using the checkbox in the upper left corner.



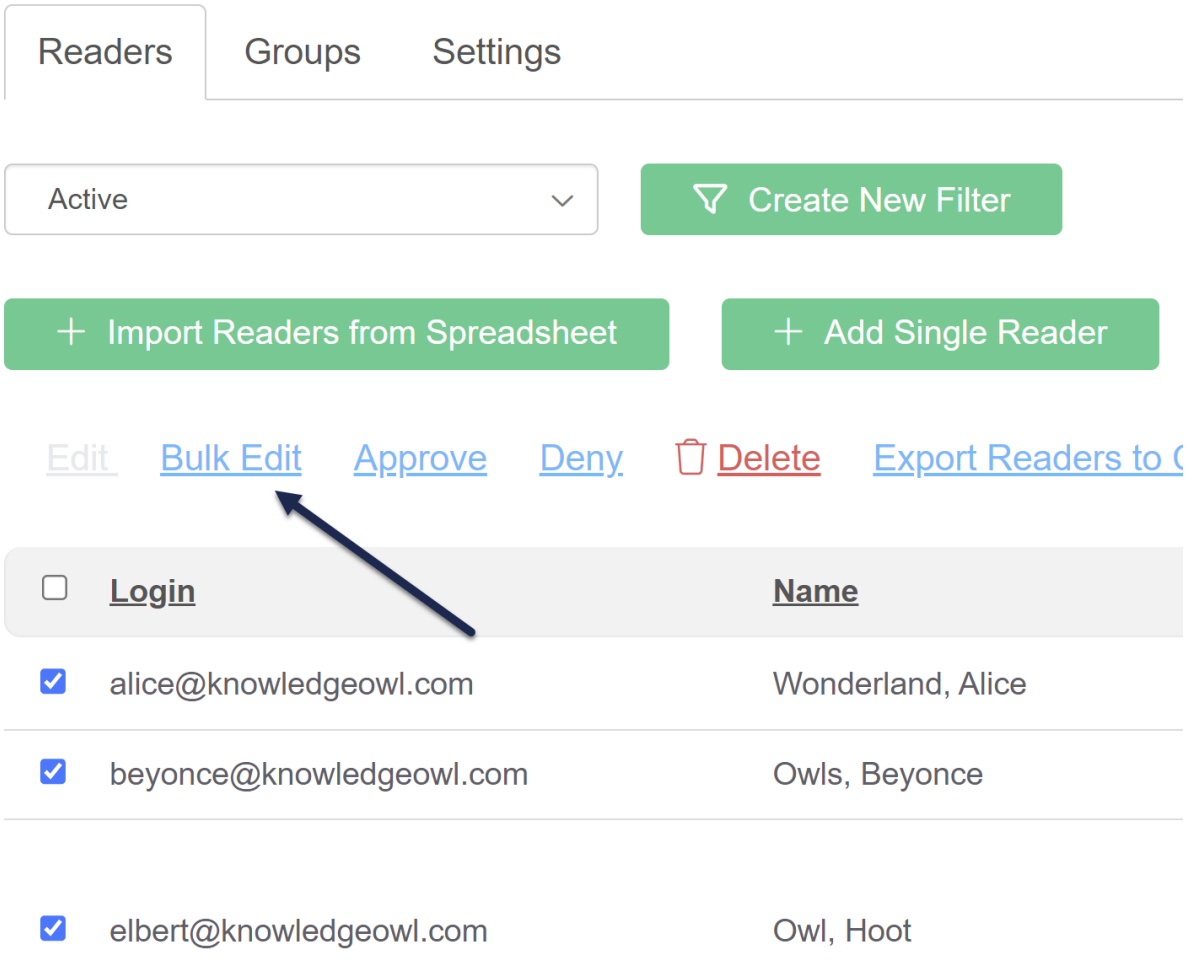
b. **Once you've selected all readers on the page, if there are multiple pages, you can click the link that appears at the top of the reader list to select all readers in the filter/view.**



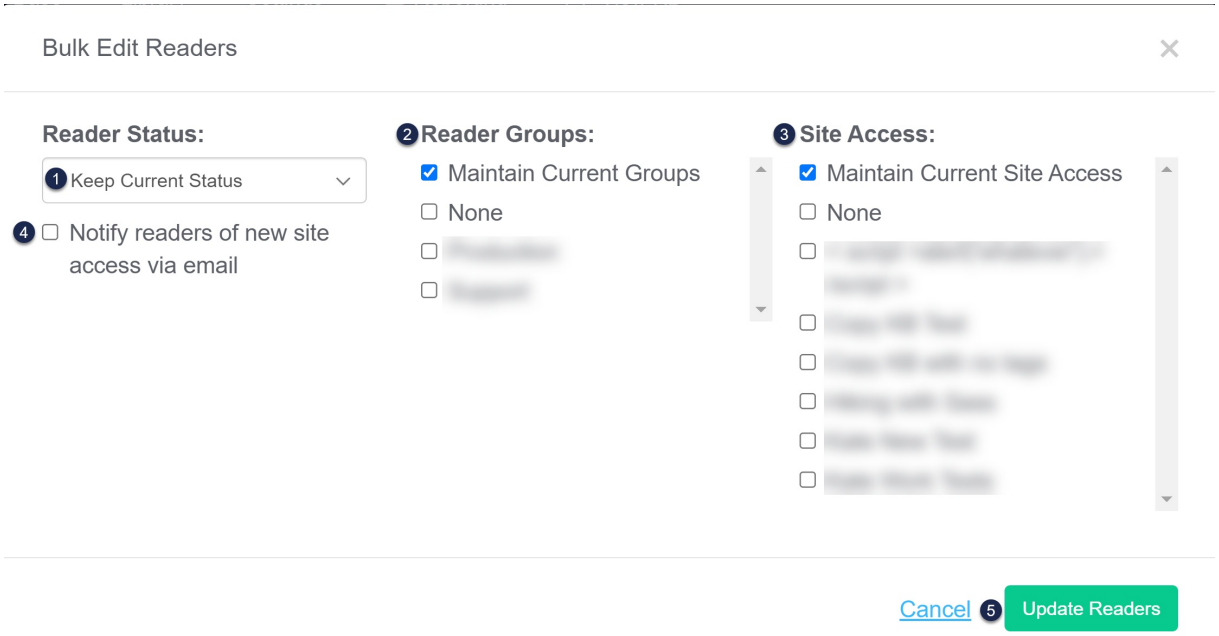
c. **Not sure what you've selected? If you select all readers that match the current filter, the text will change and you'll have the option to Clear selection.**



4. **Once you've selected all the readers you'd like to edit, click the Bulk Edit link near the top of the list.**



5. **This will open the Bulk Edit Readers pop-up where you can select what type of edits you'd like to make:**



   a. **Use the Reader Status dropdown to set readers as Active or Deleted. (Unless you're recovering deleted readers or deleting a lot of readers, leave this as Keep Current Status.)**

   b. **Use the Reader Groups checkboxes to make changes to these readers' reader groups:**

- To keep these readers' existing reader groups and **add additional groups**:
  - Check the box next to **Maintain Current Groups**.
  - Check the box(es) next to the groups you'd like to add.
- To **remove** these readers' existing reader groups and **replace** them with new groups:
  - Uncheck the box next to **Maintain Current Groups**.
  - Check the boxes next to the groups you'd like to replace the readers' current groups with.
- To **remove all reader groups** from the selected readers:
  - Uncheck the box next to **Maintain Current Groups**.
  - Check the box next to **None**.

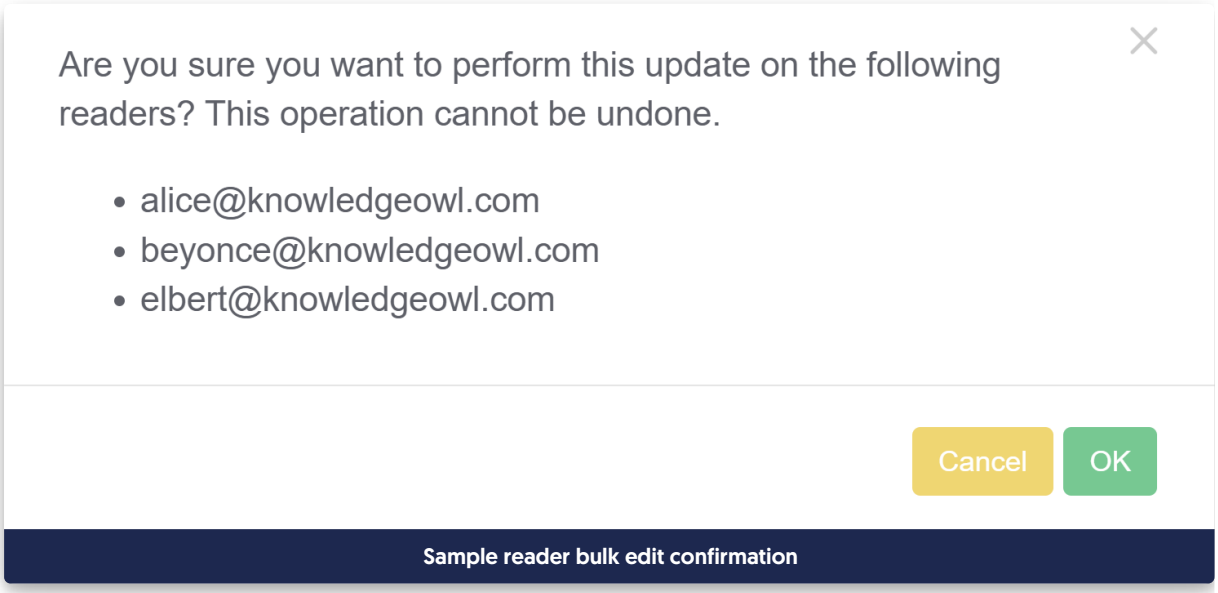
c. Use the **Site Access** checkboxes to make changes to the knowledge bases these readers can access:
   - To keep these readers' existing knowledge base access and **add access to additional knowledge bases**:
     - Check the box next to **Maintain Current Site Access**.
     - Check the box(es) next to the knowledge bases you'd like to add.
   - To **remove** these readers' existing knowledge base access and **replace** them with new knowledge bases:
     - Uncheck the box next to **Maintain Current Site Access**.
     - Check the boxes next to the knowledge bases you'd like to grant the readers access to.
   - To **remove all knowledge base access** from the selected readers:
     - Uncheck the box next to **Maintain Current Site Access**.
     - Check the box next to **None**.

d. If you are adding the readers to new knowledge bases in the **Site Access** section, you can choose whether or not you'd like to send a welcome email for the new knowledge base access to these readers using the **Notify readers of new site access via email** checkbox. This defaults to unchecked (no email will be sent). To send a welcome email, check the box.

e. Once you've made all your bulk edit selections, click on the **Update Readers** button to continue with the bulk edit.

6. A pop-up will appear asking you to confirm you'd like to complete the bulk edit, providing some detail on the number of readers selected. For a single reader or edits to 6+ readers, you'll see a count; for edits

to 2-5 readers, their names will be listed:



Sample reader bulk edit confirmation

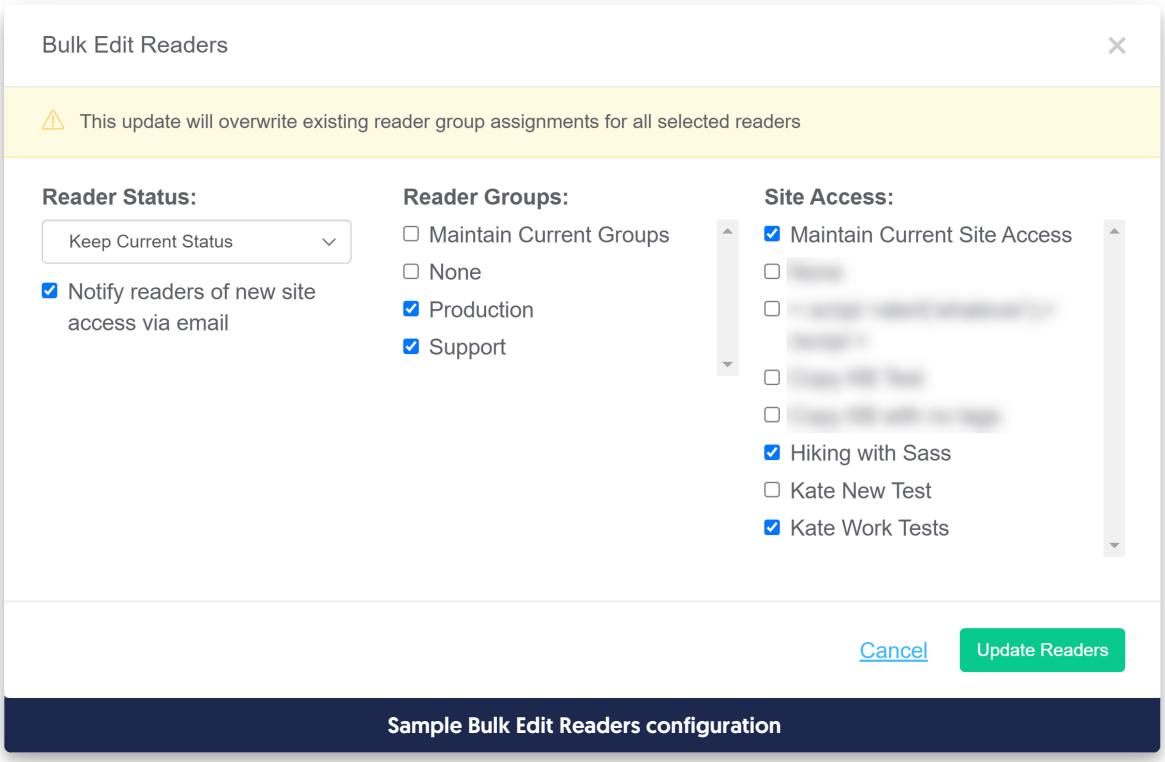
7. Click **OK** in the confirmation pop-up to complete the bulk edit.

Example

Linus would like to update a group of readers to:

- **Give them access to two new knowledge bases (Hiking with Sass and Kate Work Tests)**
- **Overwrite any existing reader group assignments they have and add them to the Production and Support reader groups**
- **Send a welcome email for the new knowledge base access**

Here's the configuration he'd use:



Sample Bulk Edit Readers configuration

Here's what that configuration means:

- Unchecking the Maintain Current Groups box means that any existing reader group assignments for these readers will be removed.
- Checking the Production and Support reader group boxes will assign these readers to those groups.
- Leaving the Maintain Current Site Access box checked means that this bulk edit won't remove any existing knowledge base access these readers might have.
- Checking the boxes next to Hiking with Sass and Kate Work Tests ensures these readers will be added to both knowledge bases.
- Checking the Notify readers of new site access via email means a reader welcome email will be sent to these readers for the new knowledge base access.

Purge deleted readers

Last Modified on 05/29/2024 5:28 pm EDT

When an admin author deletes a reader, the reader account still exists and can be viewed using the **Deleted** filter.

To permanently delete readers, use the **Purge Deleted Readers** option.

Purging deleted readers will completely and totally delete all record of all readers in the Deleted filter from KnowledgeOwl's systems. This can be useful for GDPR compliance or just keeping your Readers list tidy.

Purged reader accounts CANNOT be recovered.

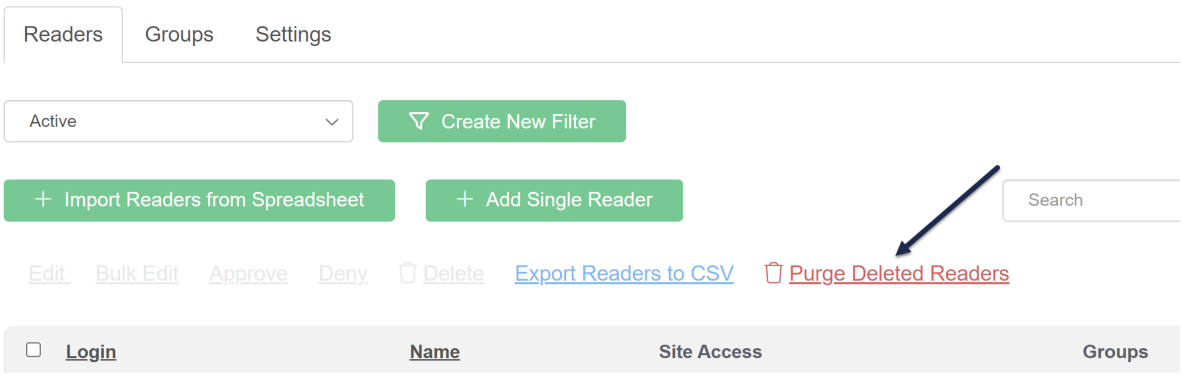
Deleted readers can only be purged by authors with:

- **Full Admin** rights
- **Admin access to readers** AND **Admin ability to purge readers** rights

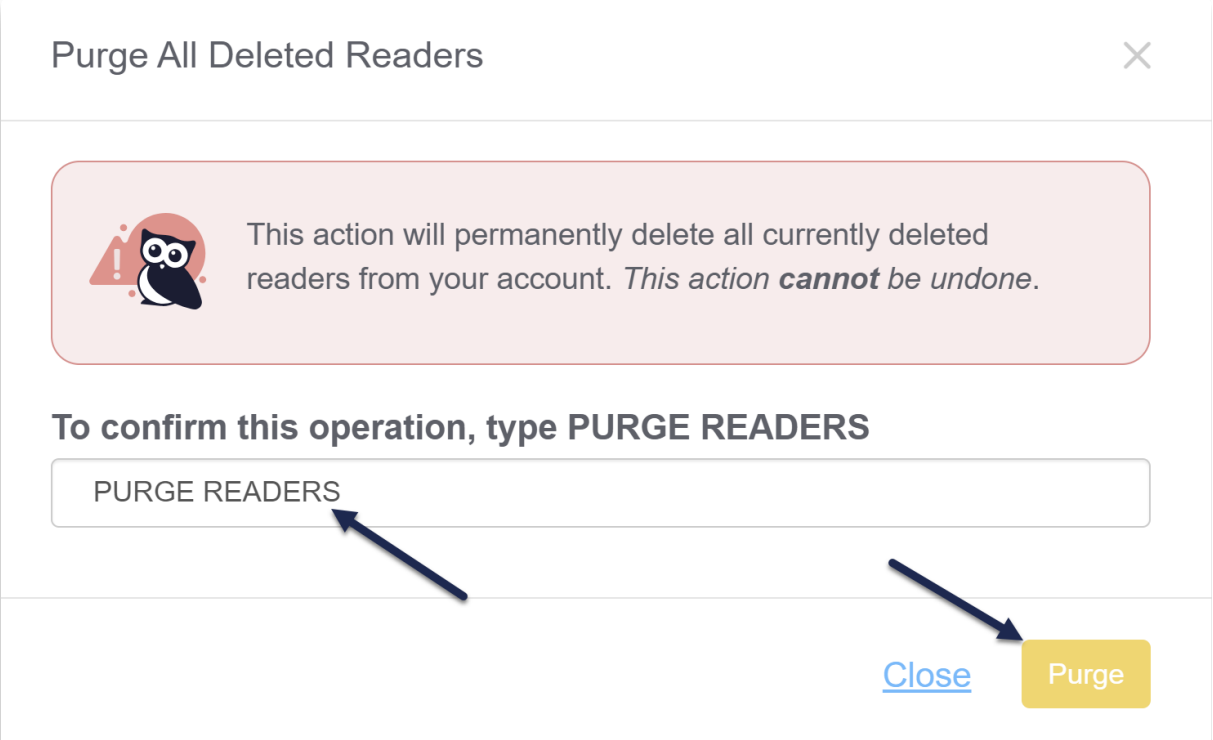
See Author permissions for more information on these Admin Rights.

To purge deleted readers:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. If you have appropriate permissions and there are Deleted readers available to be purged, the **Purge Deleted Readers** option will appear in the link options near the top of the page. Click that link to begin the process:

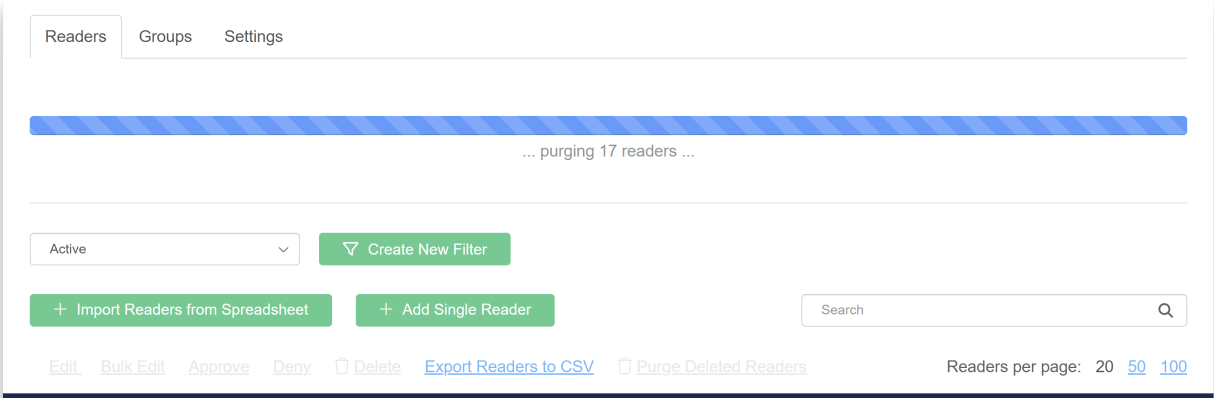


4. This will open a confirmation pop-up warning you that this action cannot be undone. To proceed with the reader purge, type PURGE READERS into the box.
5. Once you type the correct phrase, the **Purge** button becomes activated. Select that button to begin the purge.



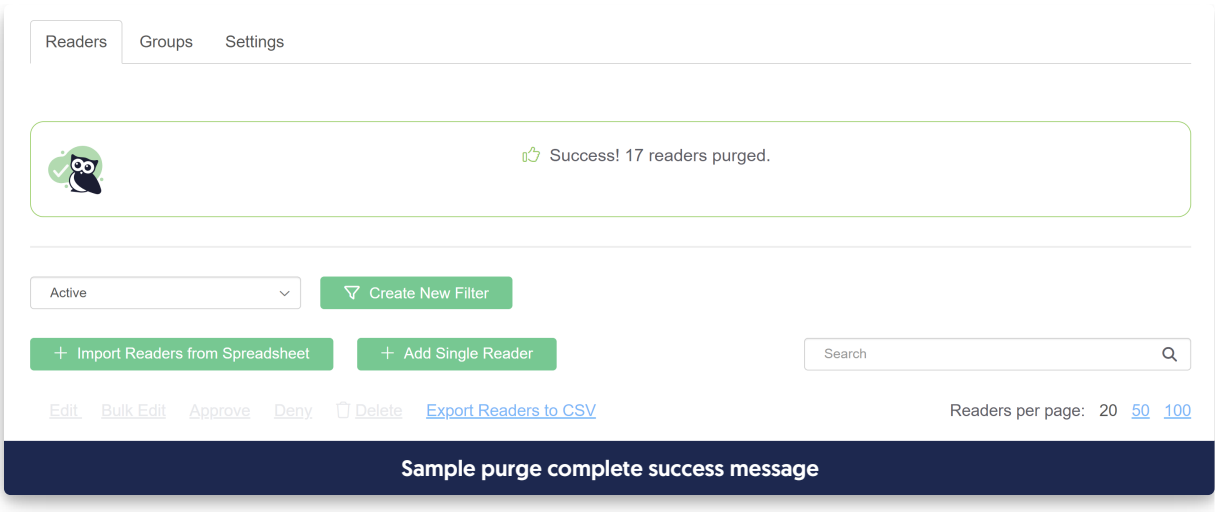
Sample purge deleted readers pop-up. Type the appropriate text and select Purge to begin the purge.

6. **While the purge is running, a progress bar displays across the Readers page. This will display to any authors with appropriate access who view this page while the purge is running.**



Sample purging progress bar

7. **Once the purge is complete, that progress bar is replaced with a success message:**



Sample purge complete success message

At this point, your Deleted filter should be empty and the Purge Deleted Readers option will disappear until you have more Deleted readers available for purging.

How do reader groups work?

Last Modified on 07/10/2024 4:34 pm EDT

We're often asked if it's possible to have content for different readers in the same knowledge base. For example, maybe you have both internal support documentation as well as customer-facing product documentation in the same knowledge base. Or, you might have a knowledge base that contains categories for different departments or teams in your organization.

If you'd like to segregate content--or display different content to different readers--you can do this by using Reader Groups and the Restrict to Groups option in the content itself.

There are three basic steps in this process:

- Create reader groups
- Assign readers to those reader groups (set their **Reader Group Access** by creating/editing an individual reader, bulk-creating new readers, or bulk-editing existing readers)
- Restrict content to reader groups

Let's say I have a category of documentation called KO Product Support, and that category is restricted to a reader group called KO support.

If I'm a member of KO support, I'll see this content in the table of contents, search, etc.

If I'm **not** a member of KO support:

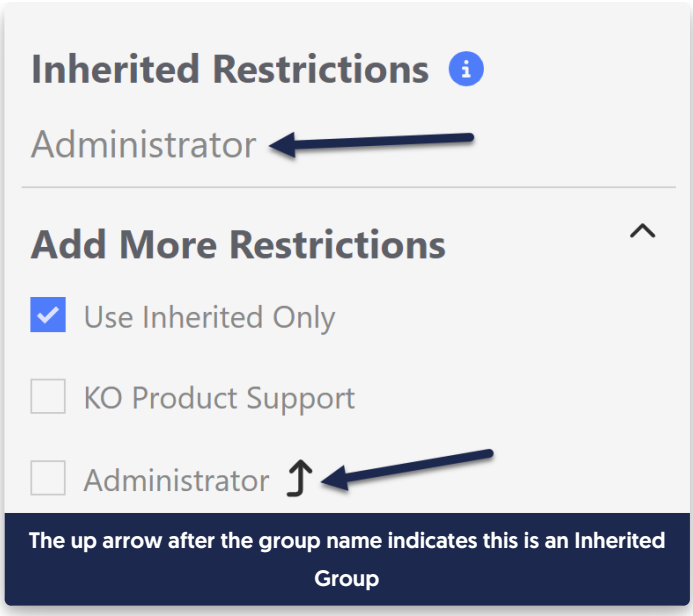
- I won't see the KO Product Support category in the table of contents or on the homepage
- If I type to search, the typeahead search won't show me any of the articles in KO Product Support
- If I complete a full search, the search results won't show me any of the articles in KO Product Support
- If someone gives me the direct link to an article in KO Product Support, I'll only see a message that I don't have access to that content

In short, the content isn't something I can find or discover on my own, and even with a direct link, I can't access it.

Can I set reader group restrictions for an entire category?

Yes! If you restrict a category to certain groups, all of that category's content (subcategories + articles) will automatically inherit the reader group restrictions you set. We call these **Inherited Restrictions**. Any reader groups that an article or subcategory is inheriting are shown in the **Inherited Restrictions** section.

There's also an up arrow icon in the **Restrict to Groups** list to identify inherited groups:



If you're using inherited reader groups and topic articles, you may need to specifically check the boxes in the **Add More Restrictions** section to have topic articles display in PDFs. See Reuse an article within another article for more information.

Can I override restrictions inherited from a category?

No. You can add additional groups in the **Add More Restrictions** section, but you can't remove any of the inherited groups.

If you do add a group in the **Add More Restrictions** section, a reader must belong to that group as well as the **Inherited Restrictions** group. See the following section for more information on that behavior!

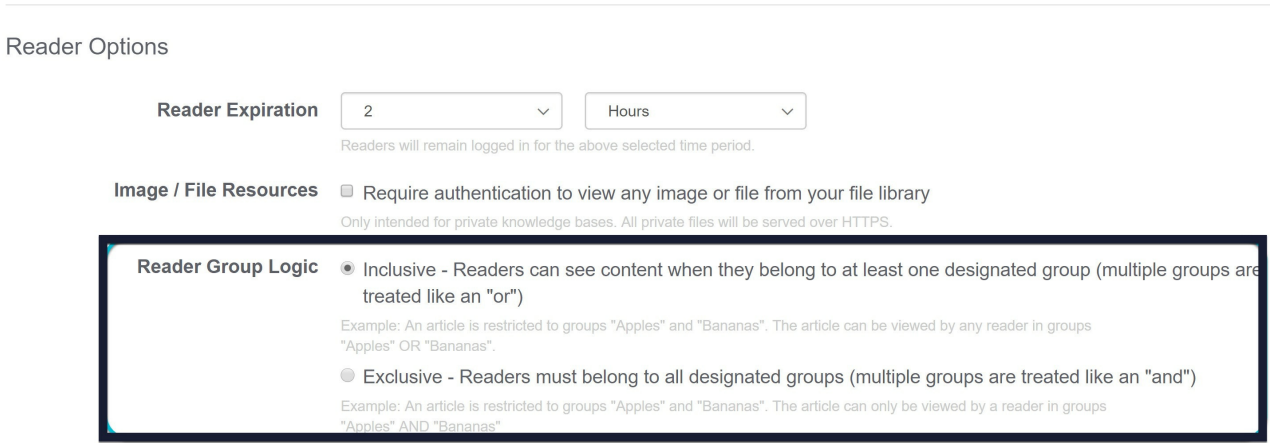
If an article or category has multiple group restrictions selected, what happens?

The short answer is: it's a little complicated.

You might have multiple groups selected by:

1. Having multiple groups displayed in the **Inherited Restrictions** section
2. Having multiple checkboxes selected in the **Restrict to Groups** section
3. Having one or more groups in the **Inherited Restrictions** AND the **Add More Restrictions** section

For the first two scenarios, the behavior depends on your knowledge base's Reader Group Logic settings. You can check or update the Reader Group Logic by going to **Settings > Security** and checking the **Reader Options** section:



Two Reader Group Logic options are supported: Inclusive and Exclusive.

Inclusive is the KnowledgeOwl default.

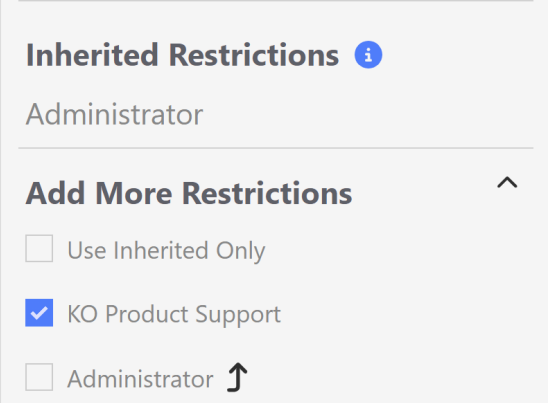
- **Inclusive:** Readers can see content when they belong to at least one designated group (multiple groups are treated like an "or")
  - **Example:** An article is restricted to groups "Apples" and "Bananas".
    - Reader in Apples group only: sees the article
    - Reader in Bananas group only: sees the article
    - Reader in both Apples and Bananas group: sees the article
    - Reader in the Pineapples group: won't see the article
- **Exclusive:** Readers must belong to all designated groups (multiple groups are treated like an "and")
  - **Example:** An article is restricted to groups "Apples" and "Bananas".
    - Reader in Apples group only: won't see the article
    - Reader in Bananas group only: won't see the article
    - Reader in both Apples and Bananas group: sees the article
    - Reader in the Pineapples group: won't see the article

For the third scenario:

- Having one or more groups in the **Inherited Restrictions** AND the **Add More Restrictions** section

The Inclusive/Exclusive logic still applies within each of those sections, but the sections combined are treated as a combination: a reader must belong to at least one of the **Inherited Restrictions** groups AND one of the **Add More Restrictions** groups.

Example: An article has **Inherited Restrictions** for the Administrator group and has the KO Product Support group checked in the **Add More Restrictions** section:



- **Reader in Administrator group only: won't see article**
- **Reader in KO Product Support group only: won't see article**
- **Reader in both Administrator and KO Product Support groups: sees the article**
- **Reader in KO Product Support and HR groups: won't see the article**

Where can you set reader groups?

Last Modified on 05/29/2024 5:28 pm EDT

You can specify reader group restrictions in:

- Categories
- Articles
- Snippets

You'll see the option to "Restrict to Groups" or "Restrict to Reader Groups" in the editor for each of these.

How do reader groups work?

Last Modified on 07/10/2024 4:34 pm EDT

We're often asked if it's possible to have content for different readers in the same knowledge base. For example, maybe you have both internal support documentation as well as customer-facing product documentation in the same knowledge base. Or, you might have a knowledge base that contains categories for different departments or teams in your organization.

If you'd like to segregate content--or display different content to different readers--you can do this by using Reader Groups and the Restrict to Groups option in the content itself.

There are three basic steps in this process:

- Create reader groups
- Assign readers to those reader groups (set their **Reader Group Access** by creating/editing an individual reader, bulk-creating new readers, or bulk-editing existing readers)
- Restrict content to reader groups

Let's say I have a category of documentation called KO Product Support, and that category is restricted to a reader group called KO support.

If I'm a member of KO support, I'll see this content in the table of contents, search, etc.

If I'm **not** a member of KO support:

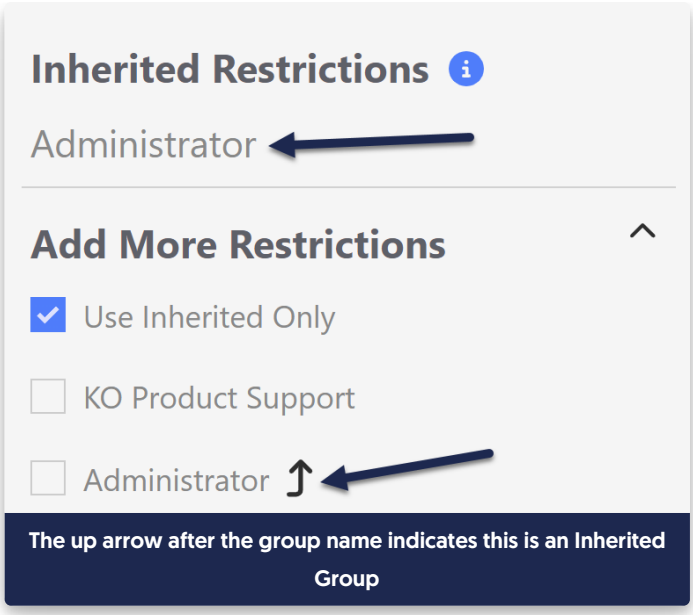
- I won't see the KO Product Support category in the table of contents or on the homepage
- If I type to search, the typeahead search won't show me any of the articles in KO Product Support
- If I complete a full search, the search results won't show me any of the articles in KO Product Support
- If someone gives me the direct link to an article in KO Product Support, I'll only see a message that I don't have access to that content

In short, the content isn't something I can find or discover on my own, and even with a direct link, I can't access it.

Can I set reader group restrictions for an entire category?

Yes! If you restrict a category to certain groups, all of that category's content (subcategories + articles) will automatically inherit the reader group restrictions you set. We call these **Inherited Restrictions**. Any reader groups that an article or subcategory is inheriting are shown in the **Inherited Restrictions** section.

There's also an up arrow icon in the **Restrict to Groups** list to identify inherited groups:



If you're using inherited reader groups and topic articles, you may need to specifically check the boxes in the **Add More Restrictions** section to have topic articles display in PDFs. See Reuse an article within another article for more information.

Can I override restrictions inherited from a category?

No. You can add additional groups in the **Add More Restrictions** section, but you can't remove any of the inherited groups.

If you do add a group in the **Add More Restrictions** section, a reader must belong to that group as well as the **Inherited Restrictions** group. See the following section for more information on that behavior!

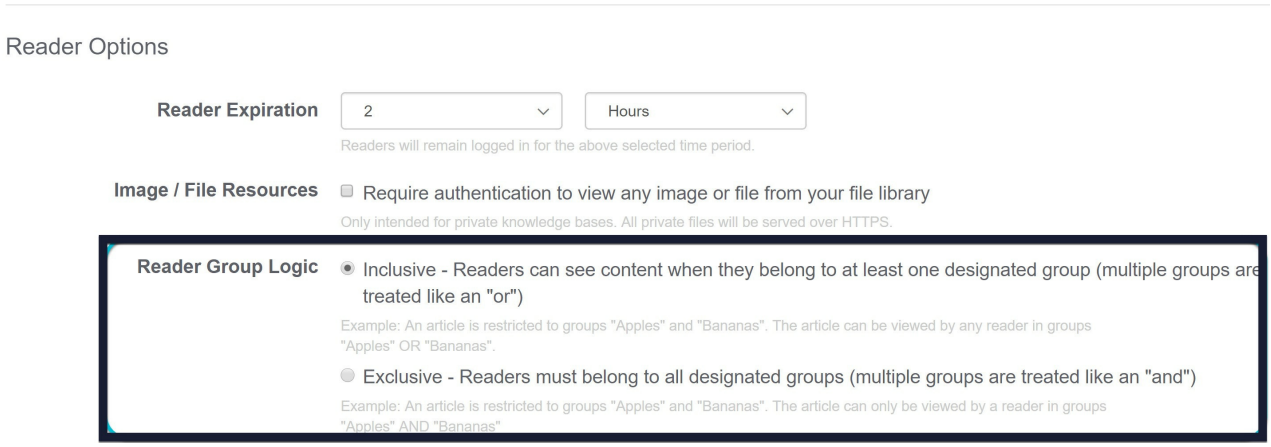
If an article or category has multiple group restrictions selected, what happens?

The short answer is: it's a little complicated.

You might have multiple groups selected by:

1. Having multiple groups displayed in the **Inherited Restrictions** section
2. Having multiple checkboxes selected in the **Restrict to Groups** section
3. Having one or more groups in the **Inherited Restrictions** AND the **Add More Restrictions** section

For the first two scenarios, the behavior depends on your knowledge base's Reader Group Logic settings. You can check or update the Reader Group Logic by going to **Settings > Security** and checking the **Reader Options** section:



Two Reader Group Logic options are supported: Inclusive and Exclusive.

Inclusive is the KnowledgeOwl default.

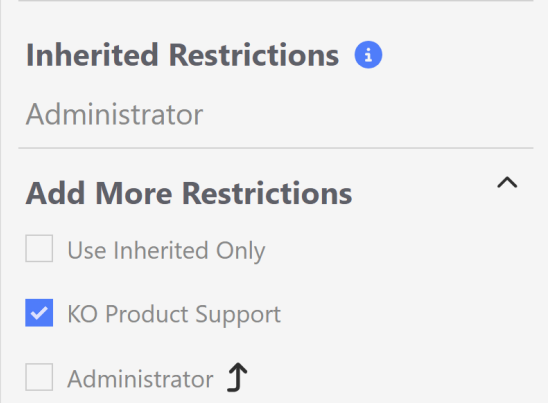
- **Inclusive:** Readers can see content when they belong to at least one designated group (multiple groups are treated like an "or")
  - **Example:** An article is restricted to groups "Apples" and "Bananas".
    - Reader in Apples group only: sees the article
    - Reader in Bananas group only: sees the article
    - Reader in both Apples and Bananas group: sees the article
    - Reader in the Pineapples group: won't see the article
- **Exclusive:** Readers must belong to all designated groups (multiple groups are treated like an "and")
  - **Example:** An article is restricted to groups "Apples" and "Bananas".
    - Reader in Apples group only: won't see the article
    - Reader in Bananas group only: won't see the article
    - Reader in both Apples and Bananas group: sees the article
    - Reader in the Pineapples group: won't see the article

For the third scenario:

- Having one or more groups in the **Inherited Restrictions** AND the **Add More Restrictions** section

The Inclusive/Exclusive logic still applies within each of those sections, but the sections combined are treated as a combination: a reader must belong to at least one of the **Inherited Restrictions** groups AND one of the **Add More Restrictions** groups.

Example: An article has **Inherited Restrictions** for the Administrator group and has the KO Product Support group checked in the **Add More Restrictions** section:



- **Reader in Administrator group only: won't see article**
- **Reader in KO Product Support group only: won't see article**
- **Reader in both Administrator and KO Product Support groups: sees the article**
- **Reader in KO Product Support and HR groups: won't see the article**

Create a reader group

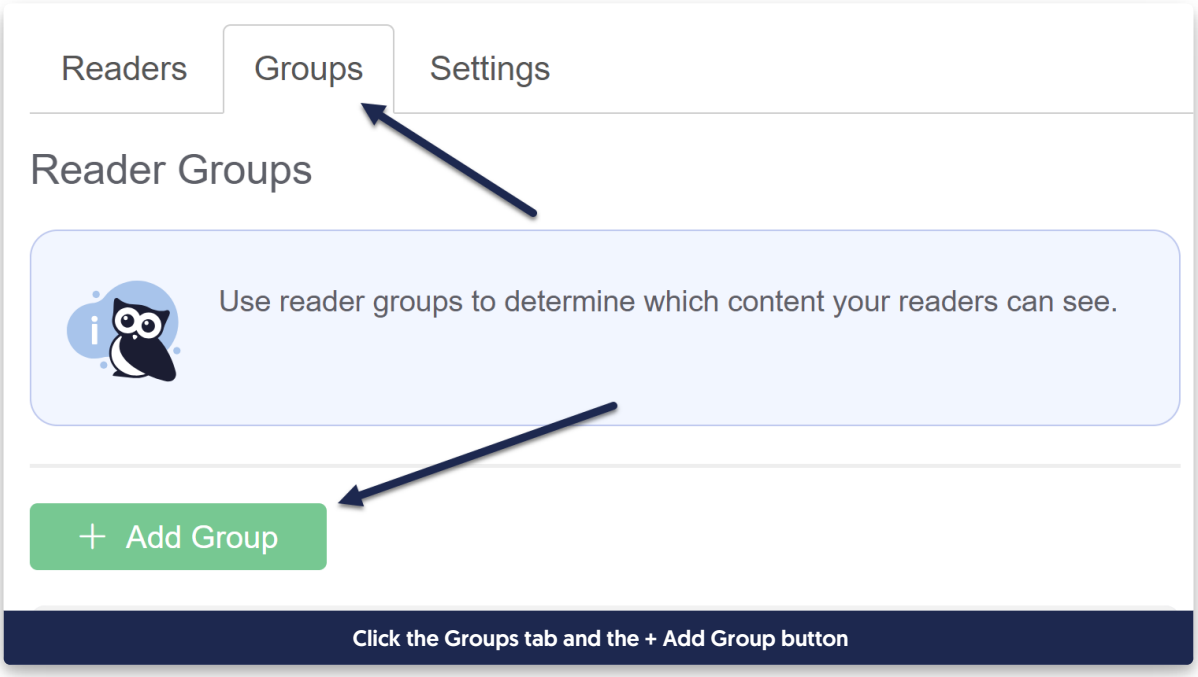
Last Modified on 05/29/2024 5:27 pm EDT

Reader groups allow you to show content only to members of the specified groups; they can be great for showing things to different customer types, internal vs. external readers, and more!

You must have either **Full Admin** privileges or **Admin access to readers** so see this option. If you don't see the **Readers** option, contact your knowledge base administrator.

To create a reader group:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Open the **Groups** tab.
4. Select the **+ Add Group** button.



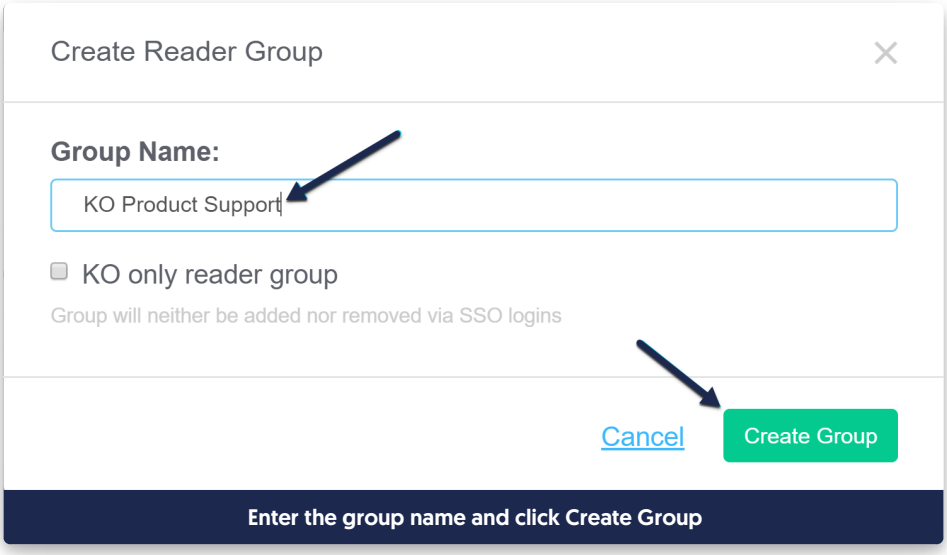
5. This will open the **Create Reader** Group pop-up where you can configure the group.
6. Type the **Group Name** you'd like to use.
7. The **KO only reader group** checkbox determines how to handle this reader group if you're using Single Sign-On (SSO). (This is mainly relevant if you are passing reader groups over as part of your SSO integration through either Direct Reader Attribute Map or Custom Attribute Map rules.) Specifically, this checkbox determines whether SSO should be able to override/add/remove readers to this group:

a. if the box is **checked**, SSO can't control group membership. You'll need to manually add or remove readers from the group.

b. If the box is **unchecked**, SSO will control and override group membership. This means that even if you manually add or remove readers from the group, SSO will override your changes to match what it has stored for their groups.

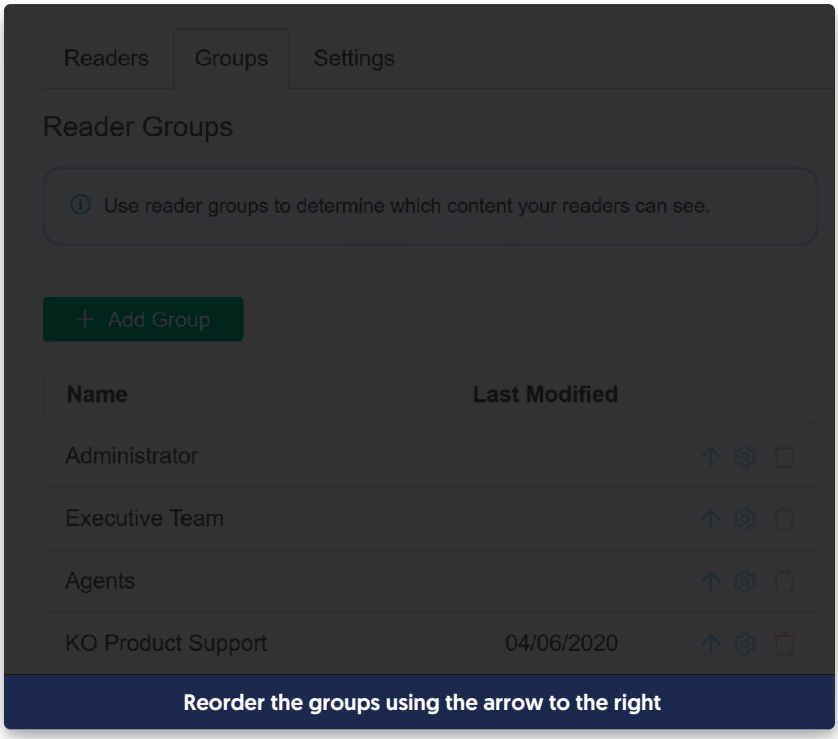
c. If you aren't using SSO, the box doesn't really change anything, since you'd still be manually administering group membership!

8. Once you've finished configuring the group's name and deciding whether SSO can control its membership, select **Create Group** to finish creating the group.



Congratulations, your group is now created! You can assign readers to it (if SSO isn't doing so), and/or restrict categories and articles to your group(s)!

To change the order your reader groups are displayed in, use the arrows to the right of the group name:



Reorder the groups using the arrow to the right

Display content only to specific readers

Last Modified on 08/07/2024 2:50 pm EDT

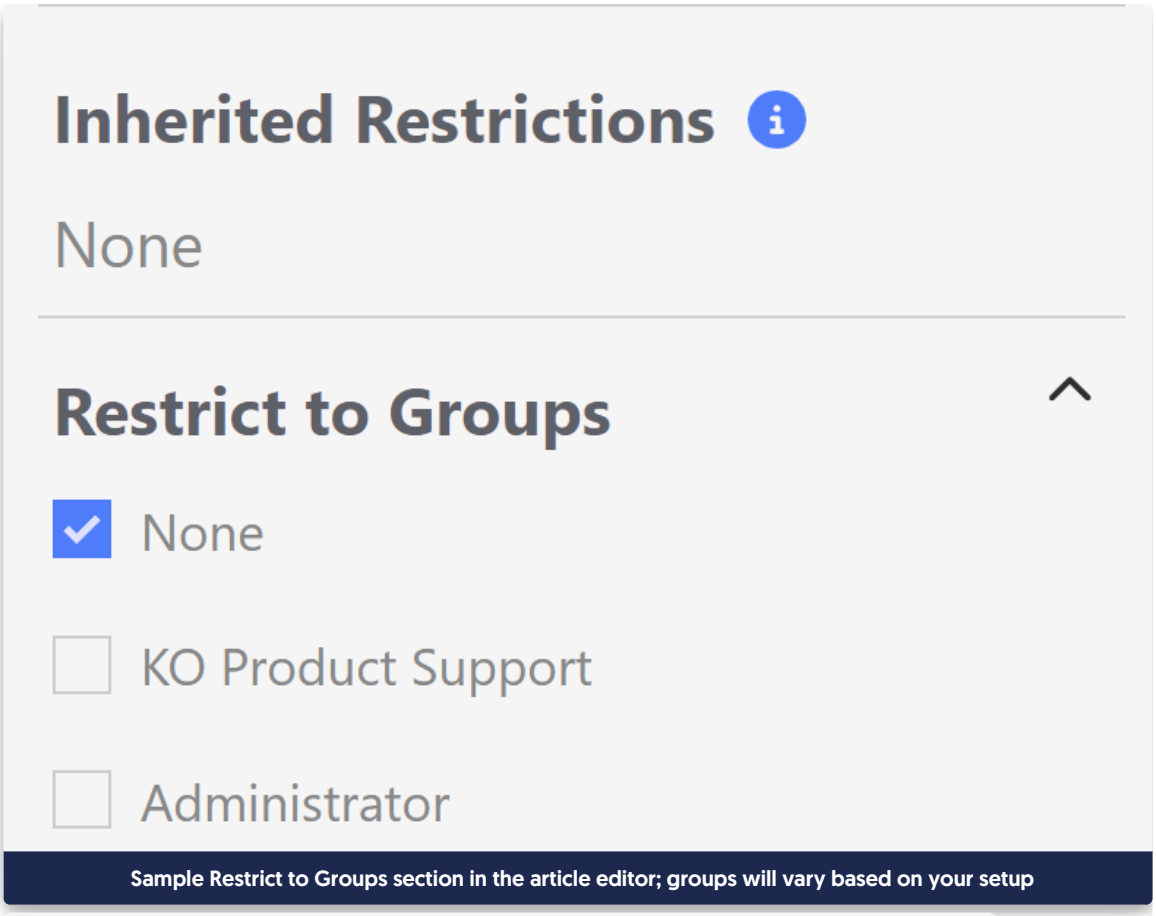
You can restrict some content so that it is only visible to specific readers. To do so, create a reader group or groups and then restrict the category or individual articles to that group.

Restrictions can be set:

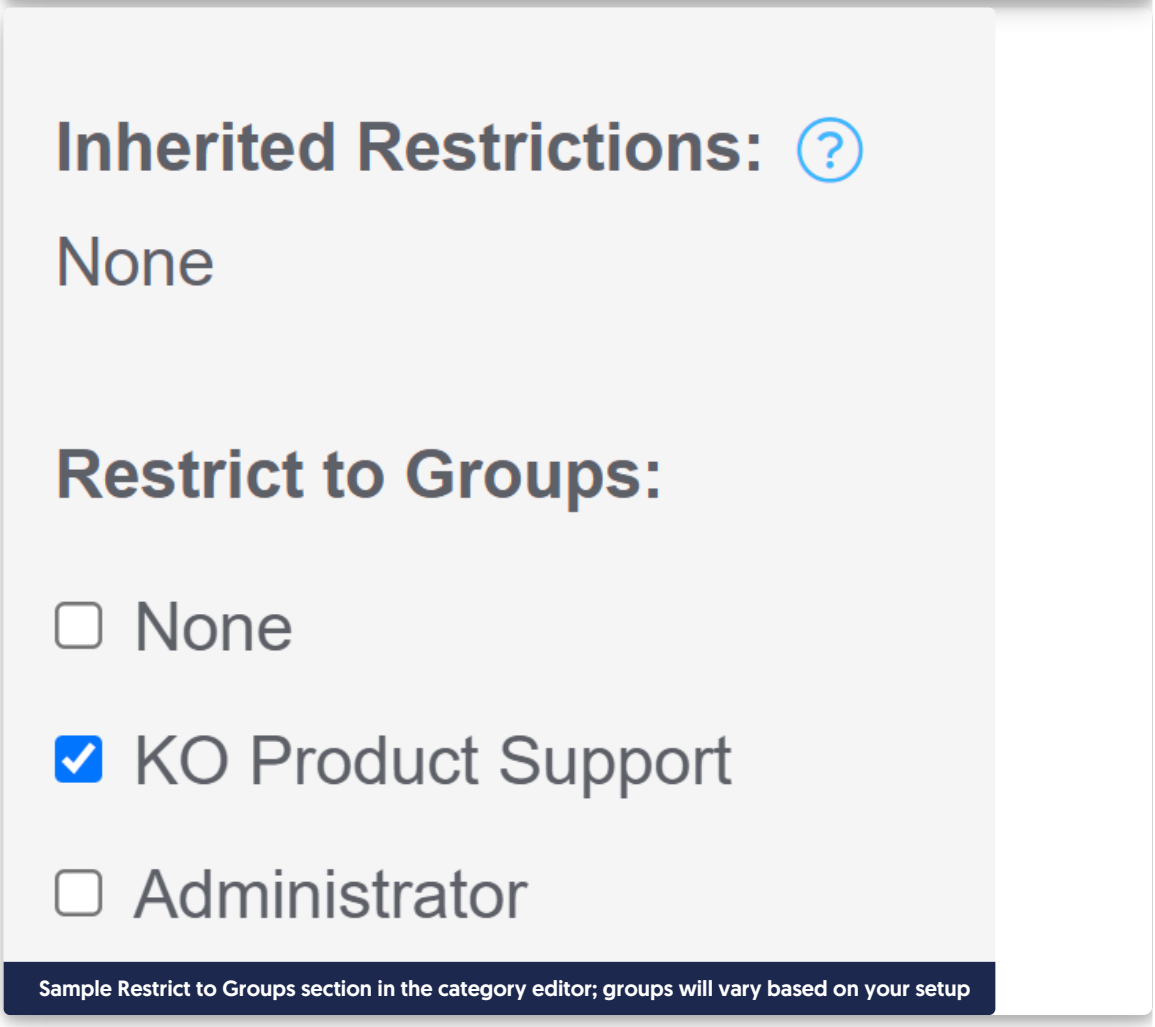
- At the **category** level: restrictions set in the **Restrict to Groups** section will automatically be inherited by all subcategories and articles in the category.
  - Groups inherited from a category are identified in the **Inherited Restrictions** section of the editor.
  - By default, articles and subcategories are set to "Use Inherited Only" (they will only use the groups they've inherited from the category).
  - You can add additional groups to individual subcategories and articles by using the **Add More Restrictions** checkboxes within those pages.
- At the **article** level: if an article has no inherited restrictions: restrictions set in the **Restrict to Groups** section apply only to the individual article and don't impact other articles or categories in any way.
  - If an article has inherited restrictions: by default it is set to "Use Inherited Only", but you may **Add More Restrictions** to require additional group membership to view the article. **Add More Restrictions** selections don't impact other articles or categories in any way.

Restrict access based on Reader Groups

1. If you do not have your reader groups set up, you will need to set them up by following these instructions.
2. Create a new category or article (or edit an existing one by clicking on the wrench icon to the right of any content) inside **Knowledge Base > Articles.**
3. If the category or article has "None" in the **Inherited Restrictions** section of the editor:
   - Use the checkboxes under **Restrict to Groups** in the righthand column to set which groups can see this content. This section looks a little different in the category editor compared to the article editor, but the functionality is the same:

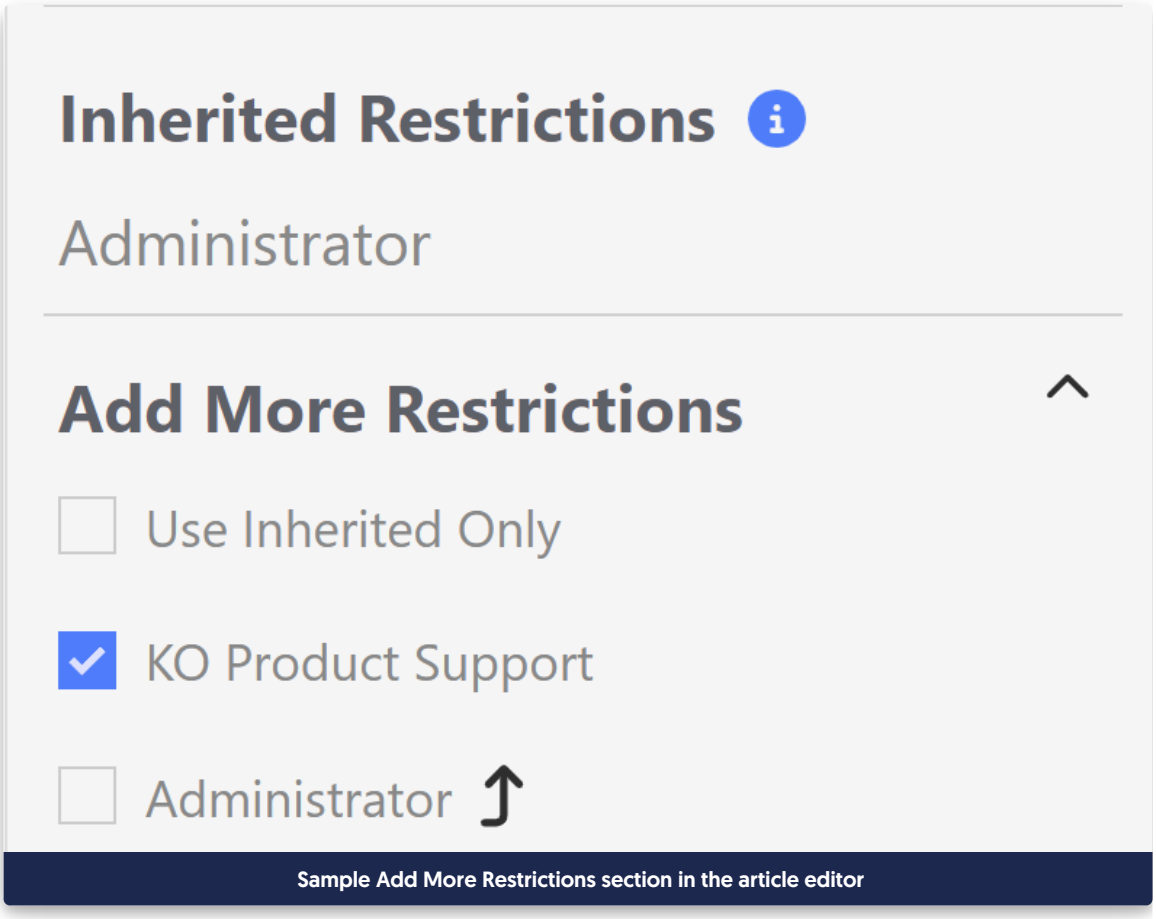


Sample Restrict to Groups section in the article editor; groups will vary based on your setup

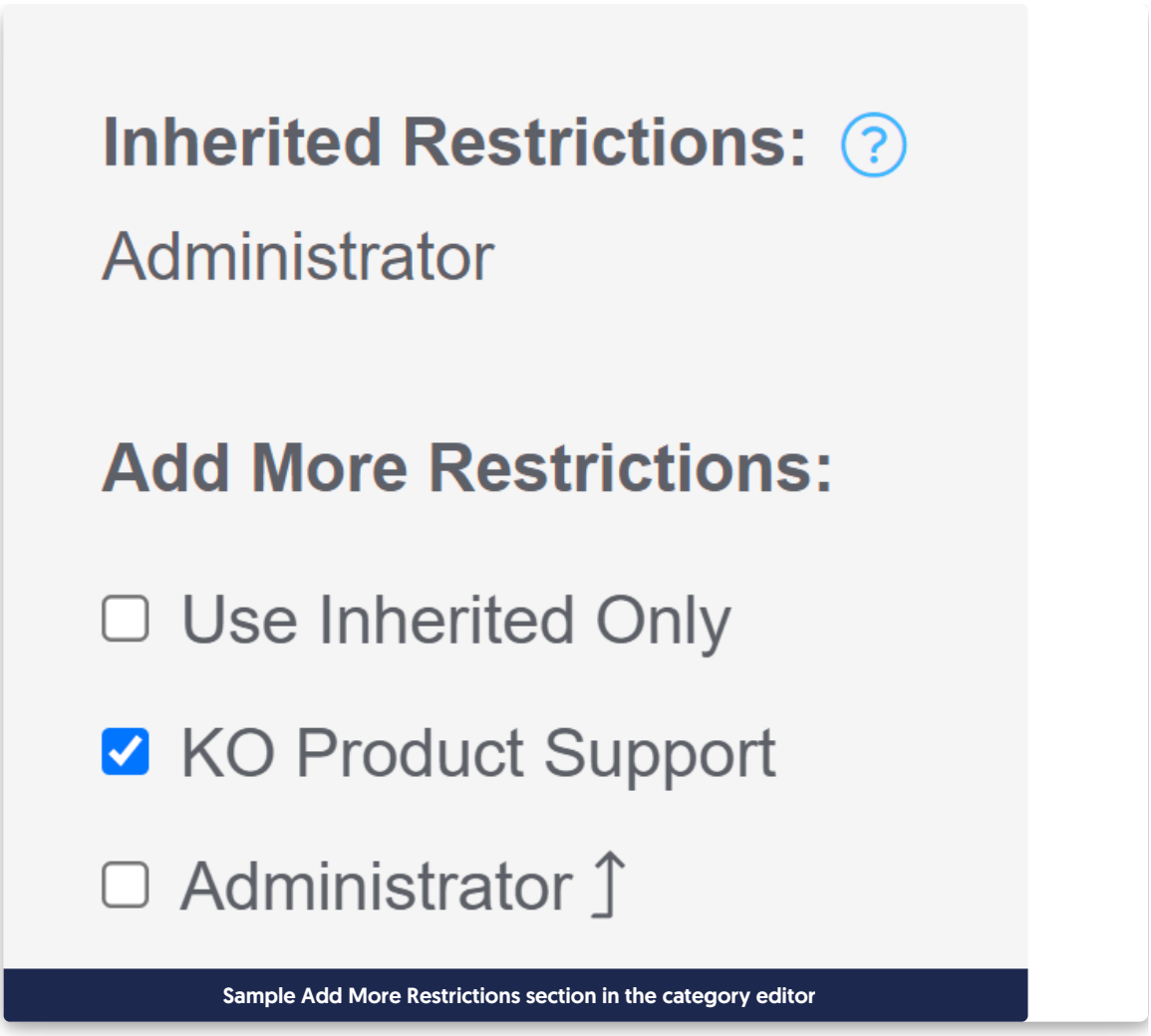


Sample Restrict to Groups section in the category editor; groups will vary based on your setup

4. If the category or article has groups listed in the **Inherited Restrictions** section of the editor:
    - Use the checkboxes to **Add More Restrictions** to the the content. Readers will have to belong to at least one of these additional groups AND at least one of the inherited groups (possibly more, depending on your knowledge base logic; see How do reader groups work? for more info).



Sample Add More Restrictions section in the article editor



Sample Add More Restrictions section in the category editor

5. Click **Save.**

For more information on how reader group work and what happens when you restrict to multiple reader groups, see How do reader groups work?

Test reader group access

Last Modified on 07/10/2024 4:19 pm EDT

Once you've set up reader groups, it's helpful to test what different reader groups will see.

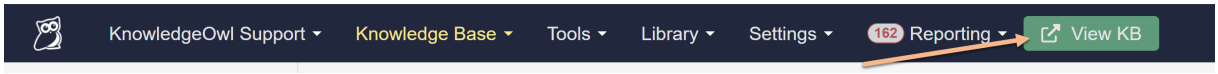
You have two options to test:

1. As an author, using the **Change Reader Groups** option in your admin footer
2. Logging in as a specific reader

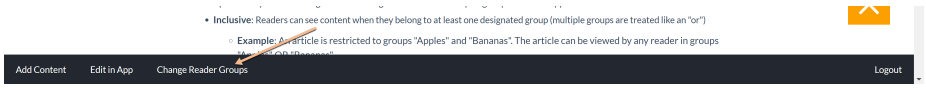
Change Reader Groups in admin footer

As an author, you can simulate membership in different groups to test them:

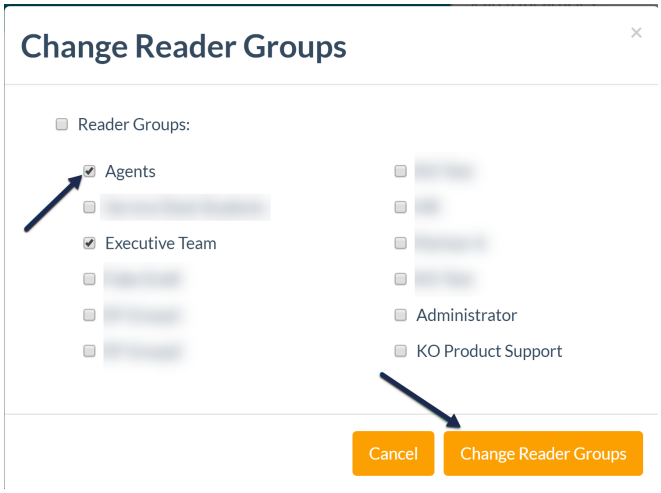
1. From app.knowledgeowl.com, click the **View KB** button in the top navigation or the **View Article** or **View Category** links in the editor.



2. This will open the knowledge base with the admin footer displayed. Click on the **Change Reader Groups** option in the footer:



3. This will open a pop-up where you can use checkboxes to select the reader group(s) you'd like to simulate:



4. Make your selections and click the **Change Reader Groups** button.

You're now viewing the knowledge base as a member of the reader group(s) you selected. You can reopen the Change Reader Groups dialog at any time to continue to switch between groups.

Testing as an individual reader

Of course, you can also create or use an existing reader's account (or assign yourself to a specific reader group) to test reader group permissions. Generally the Change Reader Groups option is ideal for testing general reader group permissions, and logging in as an individual reader might be more useful for testing to be sure you've assigned the correct reader groups to that individual reader.

In most cases, you should be able to log out and then login as a specific reader to test. However, there are some cases where you might not have a logout link. If that's the case:

1. Go to your knowledge base homepage. The URL should end in `/help`, `/home`, or `/docs`.
2. Append `/readerlogout` to the end of the URL. The URL should now end in `/help/readerlogout`, `/home/readerlogout`, or `/docs/readerlogout`.
3. Hit enter (or return) to go to this new URL.
4. Log in to your help site with the reader you wish to test.

Auto-assign groups by email rules

Last Modified on 05/29/2024 5:27 pm EDT

If you have reader sign-ups enabled, by default, new reader signups aren't assigned any reader groups. You can create rules to automatically assign readers to groups based on their email domain.

A common use case is to assign all readers with internal email addresses to an internal reader group. For example, Linus likes having a rule that will assign all readers with a `knowledgeowl.com` email address to the **Support** reader group, which gives them access to all content restricted to our Support group.

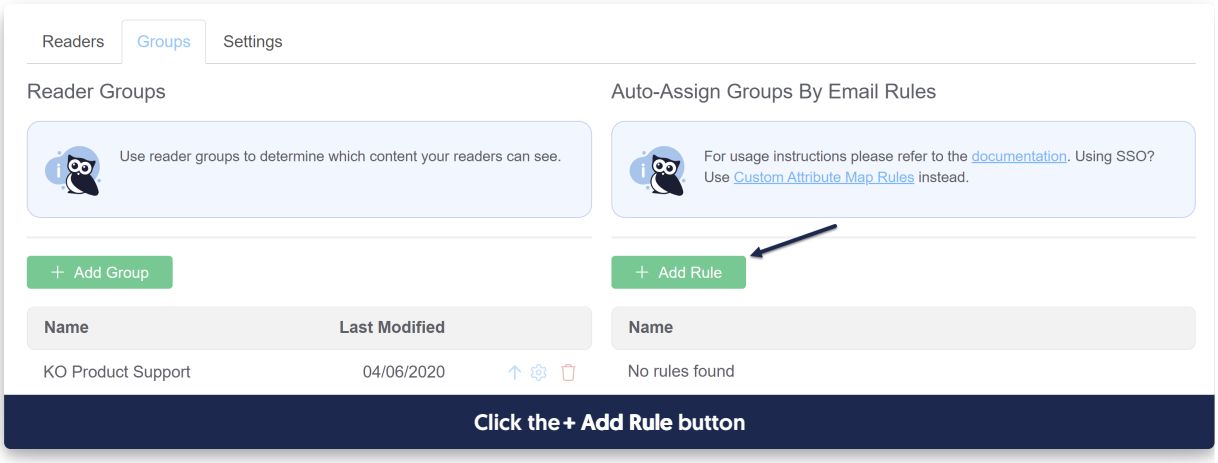
If you're using reader signup, this can help guarantee that new readers get access to the content they need without a KnowledgeOwl admin having to manually review and assign them to the appropriate groups.

These rules currently apply to readers who have signed up for access to your knowledge base **only**. They do not apply to:

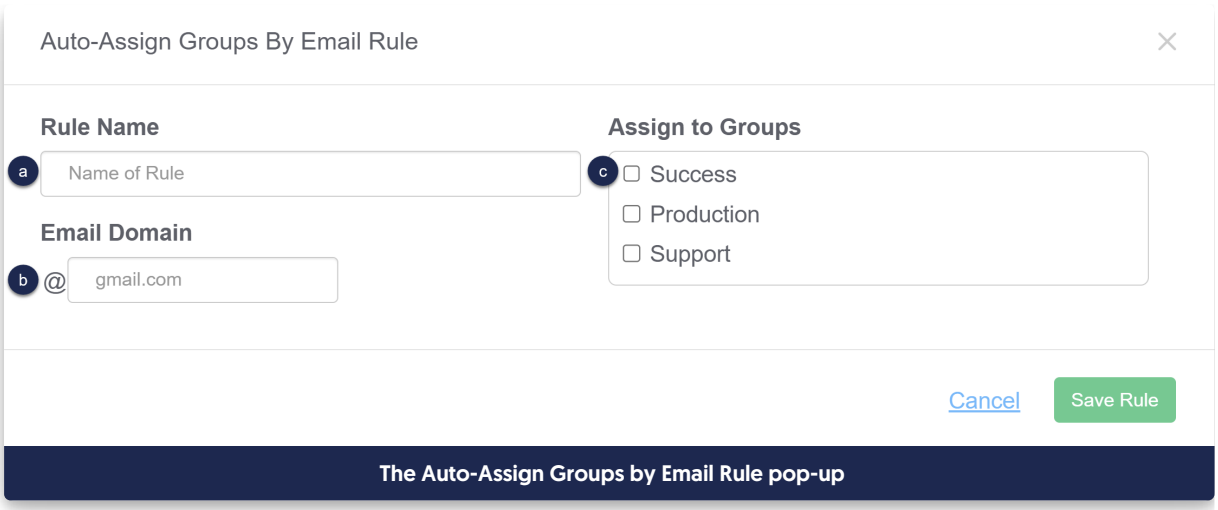
- Reader accounts that you or another KO admin manually creates in your **profile icon/name > Readers** (singly or in bulk)
- Readers who come through remote authentication or any of our SSO integrations. If you are using SSO, see Auto-Assign Groups By Email Rules (SSO Edition) for SSO-specific steps!

To set up Email Rules:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Open the **Groups** tab.
4. Select the **+ Add Rule** button.



5. This will open the Auto-Assign Groups By Email Rule pop-up. To set up your rule, include:



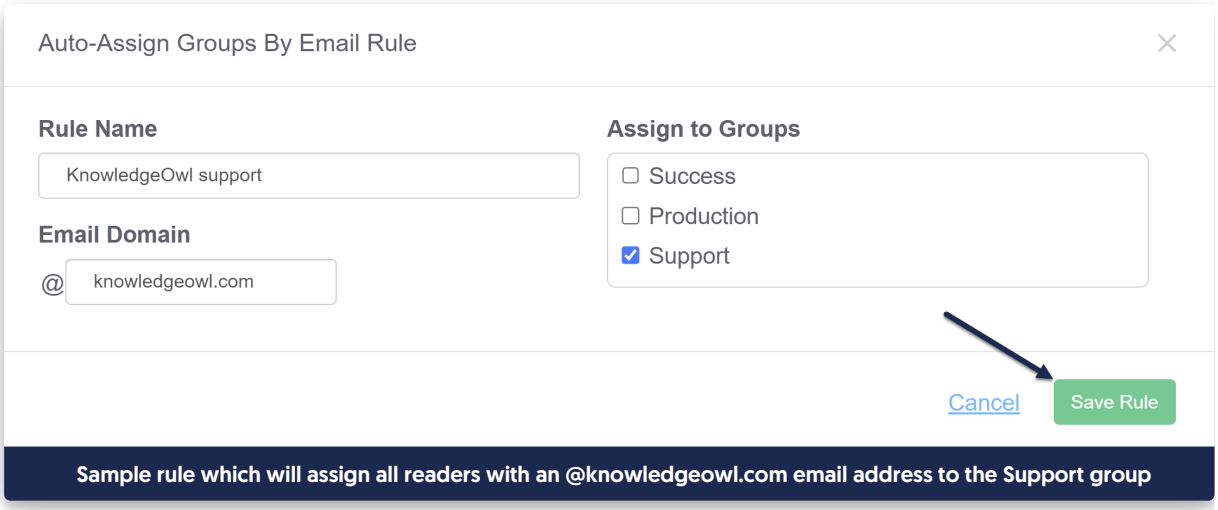
The Auto-Assign Groups by Email Rule pop-up

a. A **Rule Name**. This name will appear in the Auto-Assign Groups by Email Rules in **Readers > Groups**, so it should help describe the rule.

b. The **Email Domain** the rule applies to: all readers with this email domain will have this rule applied. It must be an entire domain (such as @knowledgeowl.com, @gmail.com, @yourcompany.com, etc.).

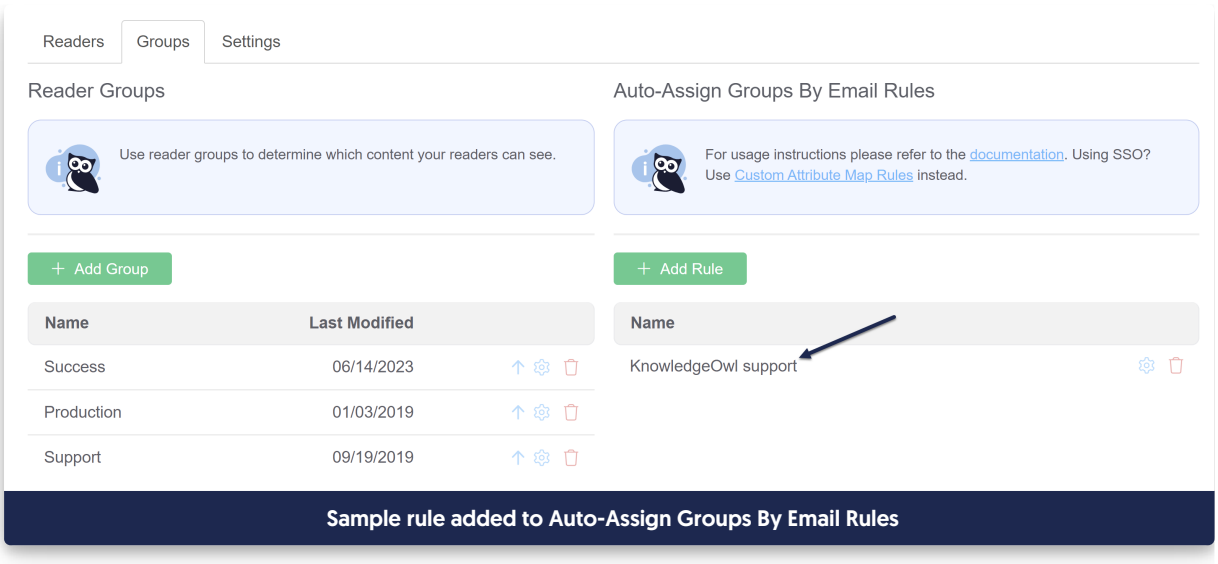
c. Use the **Assign to Groups** checkboxes to select the Reader Group(s) that people with that email domain should be assigned to. This list depends on the Reader Groups you've set up in your knowledge base.

6. Click **Save Rule** to save your changes. Here, we create a rule that will assign all readers with an @knowledgeowl.com email address to the Support group:



Sample rule which will assign all readers with an @knowledgeowl.com email address to the Support group

7. Your rule will now appear in the Auto-Assign Groups by Email Rules section of **Readers > Groups** and will be applied to all reader signups from here on out. You can edit it (gear icon) or delete it (trashcan icon) using the icons to the right of the rule.



By default, rules will only be applied when a new reader first signs up.

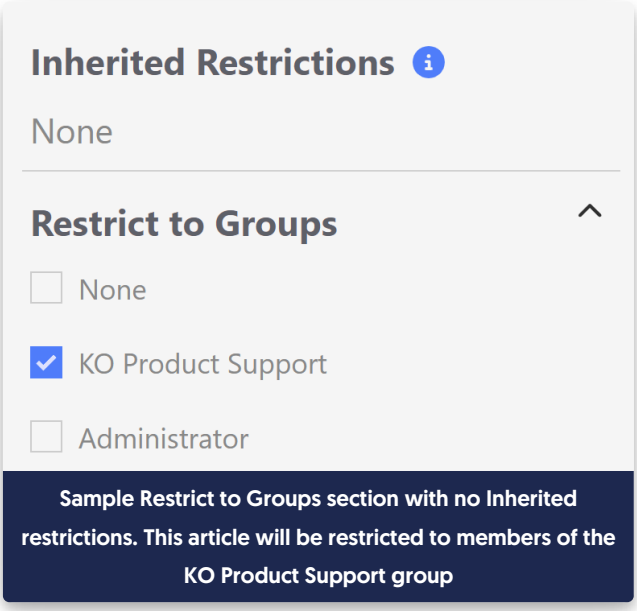
To run the rules on subsequent logins and allow rules to affect existing readers, choose "Override reader groups based on rule logic on each login" under Readers > Settings. (Note that changing this setting, though, will override any manually-assigned reader groups for readers in the rule domains, though. We don't recommend using this setting if you're using auto-assigned rules in conjunction with manually-assigned groups!)

Checking if an article or category is restricted to reader groups

Last Modified on 05/29/2024 5:27 pm EDT

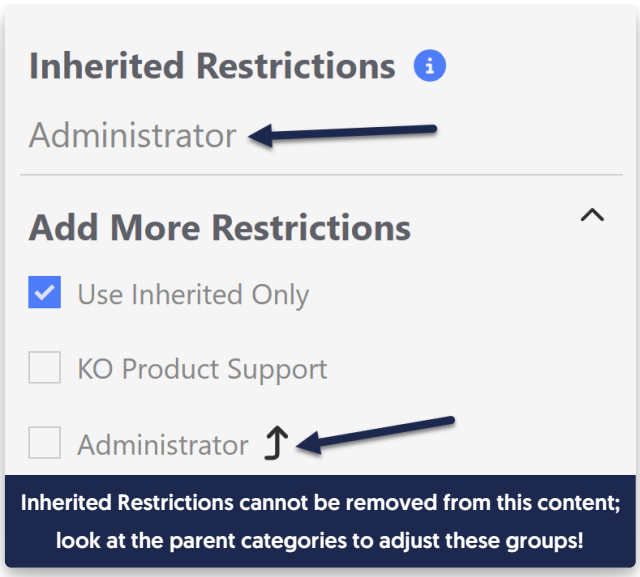
For both articles and categories, you can check two sections of the editor to see if the content is restricted to any reader groups:

1. **Restrict to Groups:** These checkboxes are for group restrictions assigned to the particular category or article you're looking at in the editor when no Inherited Restrictions are present.
    - Checking or unchecking these boxes will immediately change which groups can see this content.



Sample Restrict to Groups section with no Inherited restrictions. This article will be restricted to members of the KO Product Support group

2. **Inherited Restrictions:** When an entire category or subcategory is restricted to groups, those reader group restrictions are "inherited" by the content in that category. Any groups listed in the Inherited Restrictions section are being inherited by one or more parent categories. You'd want to check each parent category above the current content to see where those groups are being set.
    - Inherited group restrictions must be changed in the parent category where they are set. They cannot be changed in individual articles.



3. **Add More Restrictions:** If an article or category has Inherited Restrictions, the section below will be called Add More Restrictions. It will default to "Use Inherited Only." Additional groups checked here mean that a reader must be a member of at least one of these groups in addition to the Inherited Restrictions groups.
    - Groups that are "inherited" will also have an up arrow icon next to them. Unchecking a box next to an inherited group restriction will not remove the inherited restriction.

For articles, you can also see both of these fields in the Manage Articles CSV export:



Display different logos for different reader groups

Last Modified on 05/29/2024 5:27 pm EDT

Some knowledge bases use different Reader Groups to show different content to different readers.

On occasion, we've been asked if it's possible to show a different logo in the upper left depending on reader group membership. The short answer is: yes.

The longer answer is: you'll need to use a script to do this.

To do so:

1. Go to **Library** > **Files**.
2. Upload all the logos you want to use here, using the **+ Add Files** button.
3. Once you've uploaded your logos, you'll need to get the URL for each of them. See Find a file's URL for more complete steps. As you copy each URL, save it to a text editor--we'll need it later!
4. Go to **Settings** > **Style**.
5. Below the Preview Pane, be sure that **Custom HTML** is selected.
6. In the Custom HTML dropdown, be sure **Body** is selected.
7. Copy the code below and paste it into the bottom of the Body editor. Here, we use three groups, but you can use as few as two and as many as you'd like.

```
<script>
 //Show different logos depending on which reader group a reader belongs to
 $(function(){
  //Get which groups current reader belongs to
  var groups = '[reader("groups")]';

  //Switch logo for Group1 where "Group1" is the exact name of the reader group. Update to your group name.
  if(groups.indexOf("Group1") >= 0)
  {
   //Specify the image URL for Group1 and switch
      var src = "//dyzz9obi78pm5.cloudfront.net/app/image/id/{yourimageid}/n/{yourimagename.png}";
      $('.navbar-brand img').attr("src", src);
  }

  //Switch logo for Group2 where "Group2" is the exact name of the reader group. Update to your group name.
  if(groups.indexOf("Group2") >= 0)
  {
   //Specify the image URL for Group2 and switch
      var src = "//dyzz9obi78pm5.cloudfront.net/app/image/id/{yourimageid}/n/{yourimagename.png}";
      $('.navbar-brand img').attr("src", src);
  }

  //Switch logo for Group3 where "Group3" is the exact name of the reader group. Update to your group name.
  if(groups.indexOf("Group3") >= 0)
  {
   //Specify the image URL for Group3 and switch
      var src = "//dyzz9obi78pm5.cloudfront.net/app/image/id/{yourimageid}/n/{yourimagename.png}";
      $('.navbar-brand img').attr("src", src);
  }

 });
</script>
```

8. **In row 7, replace "Group1" with the exact name of your first reader group, as it appears in Your Account > Readers > Groups.**
9. **In row 10, replace the URL listed in "quotes" with the URL you copied from your File Library for the icon you'd like displayed for this group.**
10. **In row 15, replace "Group 2" with the exact name of your second reader group, as it appears in Your Account > Readers > Groups.**
11. **In row 18, replace the URL listed in "quotes" with the URL you copied from your File Library for the icon you'd like displayed for this group.**
12. **If you're using a third group, in row 23, replace "Group3" with the exact name of your second reader group, as it appears in Your Account > Readers > Groups, and replace the file URL in row 26. If you're not using a third group, you can delete rows 22-28.**
13. **If you're using more than three groups, you can copy rows 22-28 and paste them to add additional groups. Just be sure you update the group name in each and the URL of the file.**
14. **Once you're done, be sure to Save your changes.**

For example, here we have two groups called "Support" and "Production":

Custom HTML Body Preview Changes

```
<script>
  //Show different logos depending on which reader group a reader belongs to
  $(function(){
    //Get which groups current reader belongs to
    var groups = '[reader("groups")]';

    //Switch logo for Group1 where "Group1" is the exact name of the reader group. Update to your group name.
    if(groups.indexOf("Production") >= 0)
    {
      //Specify the image URL for Group1 and switch
         var src = "https://dyzz9obi78pm5.cloudfront.net/app/image/id/                    /n/mandolinus-
1.svg";
         $('.navbar-brand img').attr("src", src);
    }

    //Switch logo for Group2 where "Group2" is the exact name of the reader group. Update to your group name.
    if(groups.indexOf("Support") >= 0)
    {
      //Specify the image URL for Group2 and switch
         var src = "https://dyzz9obi78pm5.cloudfront.net/app/image/id/                    /n/kate.svg";
         $('.navbar-brand img').attr("src", src);
    }

  });
</script>
```

You can test that this script is working as expected by selecting "View KB" from the top navigation. This will open your knowledge base with the author footer, and you can use the Change Reader Groups option to toggle to see what each group will see. See Test reader group access for complete steps!

Delete a reader group

Last Modified on 05/29/2024 5:28 pm EDT

Authors with **Full Admin** access can delete reader groups.

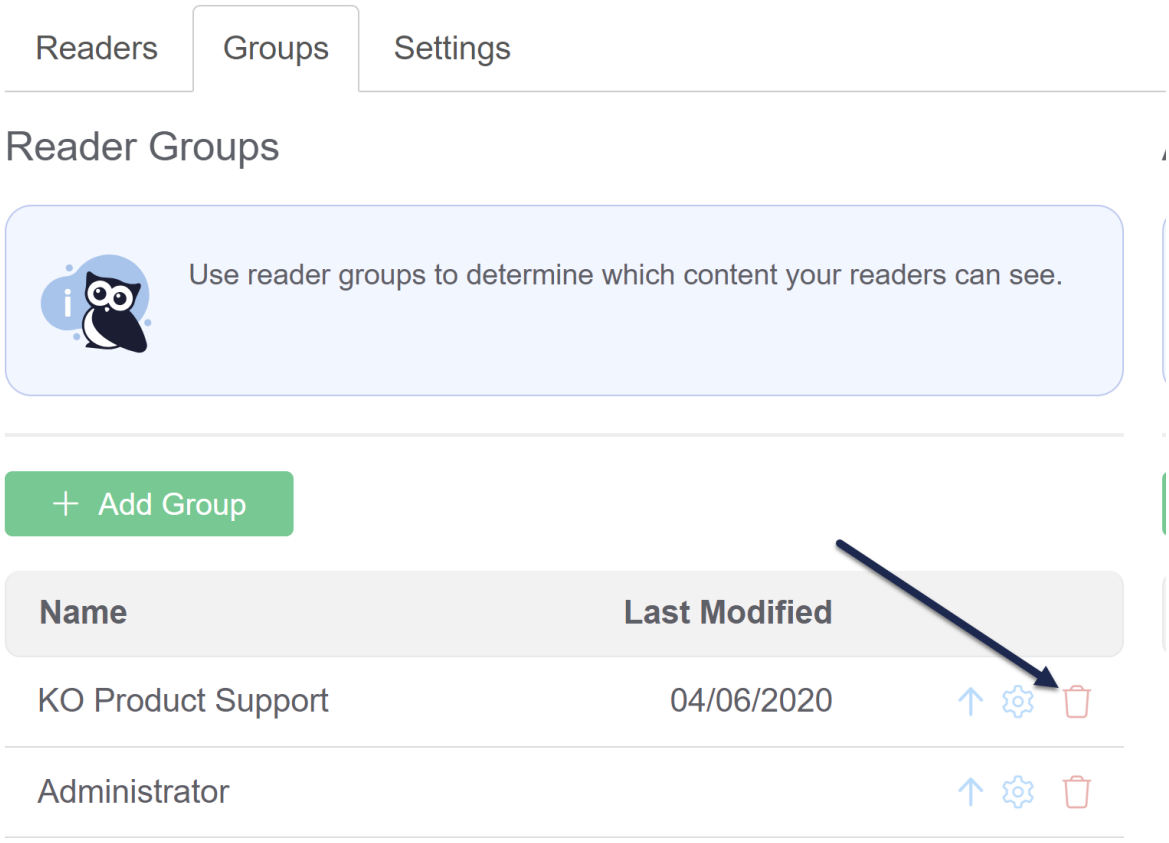
When you delete a reader group, that group will be removed from:

- All readers who were assigned to it
- Any authors who were explicitly assigned to it
- Any content that had been restricted to it (inherited or in the Restrict to Groups section)

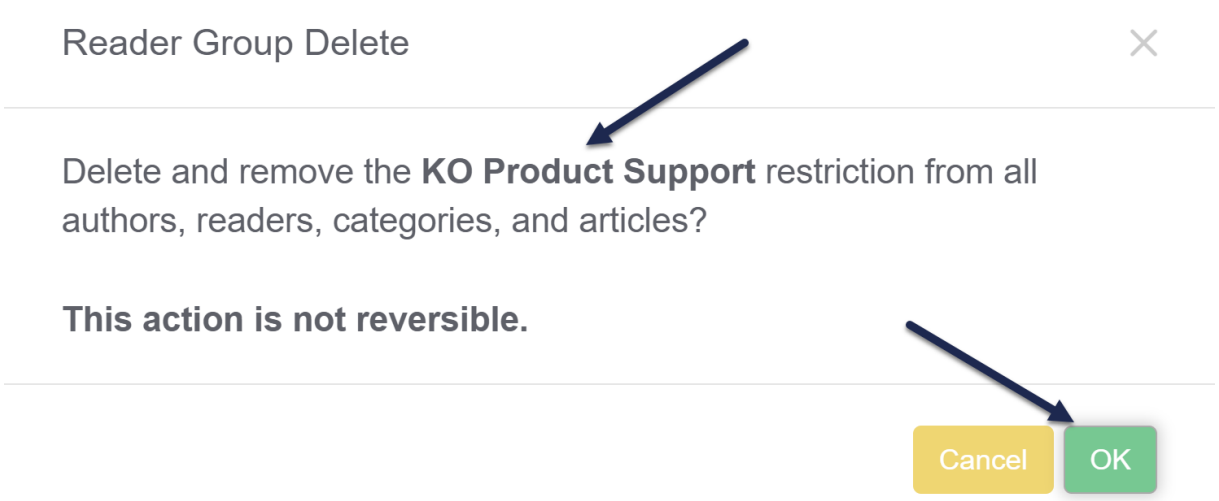
Deleted reader group restrictions and assignments are **NOT RECOVERABLE** by our support team, so please be absolutely sure you're ready to delete a group!

To delete a group:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Open the **Groups** tab.
4. Click the trashcan icon to the right of the group you want to delete.



5. **This will open the Reader Group Delete confirmation pop-up.**
6. **Verify that the group name it lists is the group you wish to delete. (Incorrectly deleted groups and all their restrictions/members CANNOT be recovered.)**
7. **If the group name matches the group you wish to delete, click OK to complete the deletion.**



8. **The group will disappear immediately from all Reader Group lists, and background processes will run to remove it from any readers, authors, or content where it was used.**

Customize your reader welcome emails

Last Modified on 05/29/2024 5:28 pm EDT

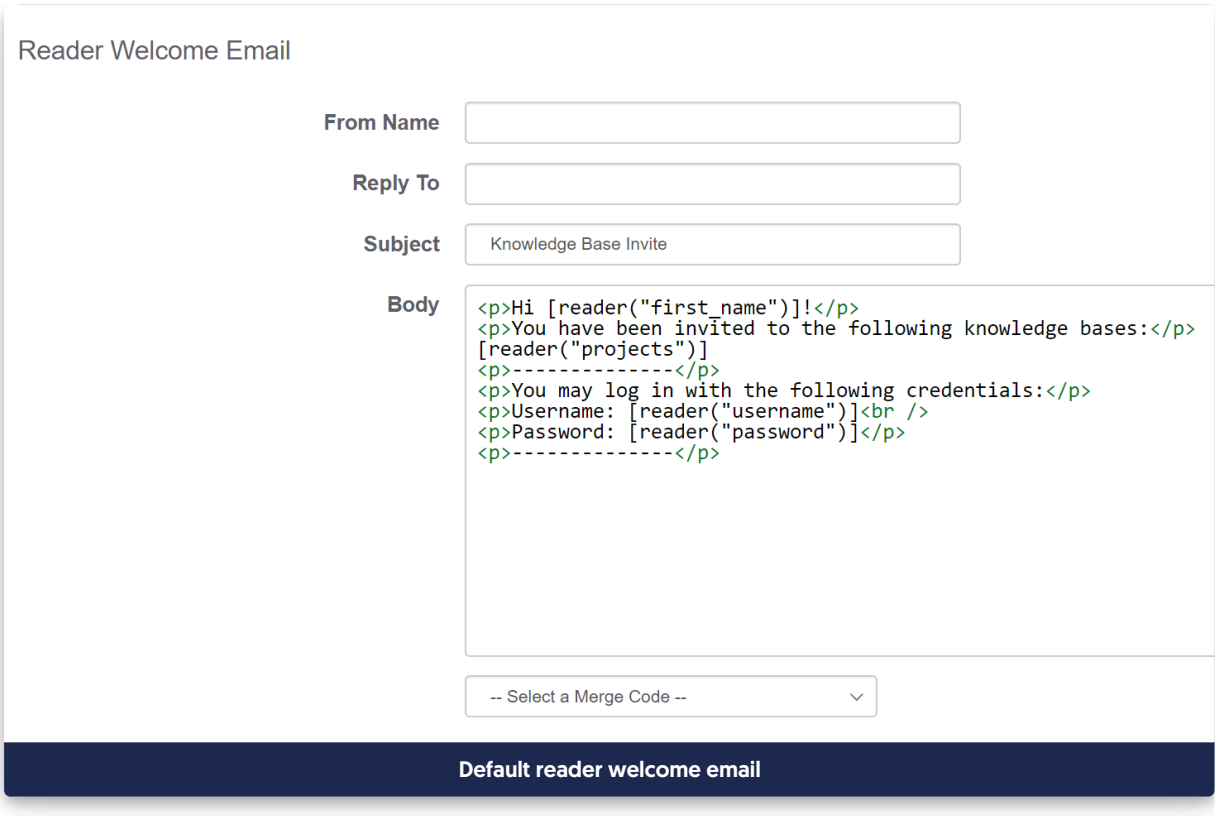
Reader welcome emails are sent to each reader when they have been added to a knowledge base.

The standard text for these welcome emails is:

> Hi [reader's first name]!
>
> You have been invited to the following knowledge bases:
>
> [Title of knowledge base]
> [Link to knowledge base]
>
> ----------
>
> You may log in with the following credentials:
>
> Username: [reader's username]
>
> Password: [reader's password]
>
> ----------

You can customize this reader welcome email. To do so:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Open the **Settings** tab.
4. Scroll to the **Reader Welcome Email** section.



5. You can make changes to:
    - **From Name:** The name displayed when the email is sent.

      Some SMTP providers will ignore this From Name and will use the name associated with the email address/account configured in the SMTP service instead. If you aren't using your own Custom SMTP for this, the name should work. :)

    - **Reply To** email address: If someone replies to the email, this is the email address that it will send to. This can be any valid email address.
    - **Subject:** The subject line of the welcome email. This welcome email is used for all knowledge bases in your account so if you have multiple knowledge bases, you may want to make it general/generic.
    - **Body:** The actual body of the email. This field requires straight HTML. (If you haven't worked with HTML before, you can create what you want in an article and then click the Code View or Source button to copy the HTML formatting!)

      Password and Login/Username are required.

        - The **-- Select a Merge Code --** dropdown at the bottom allows you to add KnowledgeOwl variables such as the reader's first or last name. The existing template uses the merge codes for:

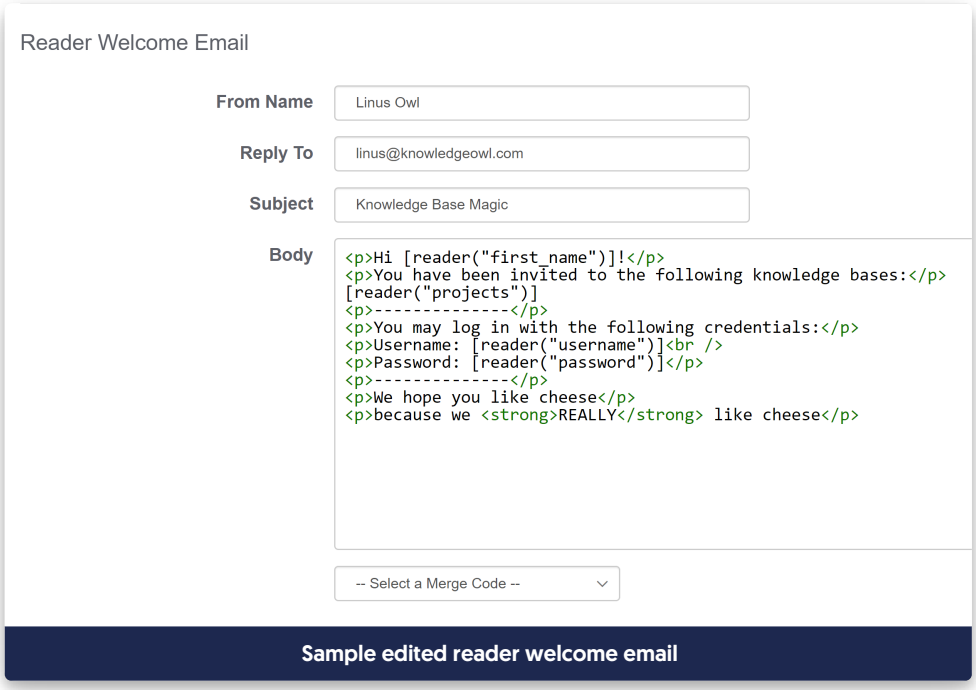
- Reader first name
- List of KBs reader has access to
- Reader Login / Username
- Reader Password

6. Once you've finished making changes, **Save** the settings.



If you have multiple knowledge bases, this reader welcome email template is used for **ALL** of your knowledge bases.

Here's a sample change, where we've updated the From Name, Reply To, and Subject, and added a statement at the bottom:



Customize your reader password reset emails

Last Modified on 05/29/2024 5:28 pm EDT

Reader password reset emails are sent to readers when:

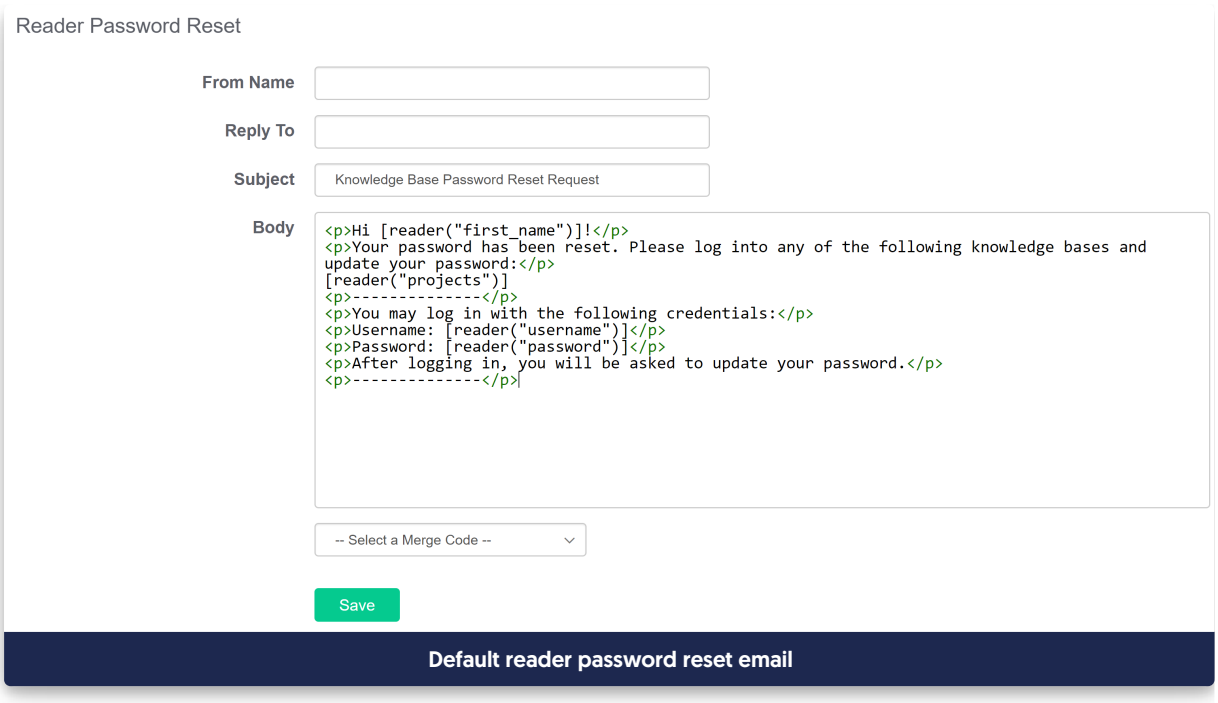
- they request a password reset
- an administrator resets their password

The standard text for these password reset emails is:

> Hi [reader's first name]!
>
> Your password has been reset. Please log into any of the following knowledge bases and update your password:
>
> [Title(s) of knowledge base(s) the reader has access to]
>
> [Link(s) to knowledge base(s) the reader has access to]
> ---
>
> You may log in with the following credentials:
>
> Username: [reader's username]
>
> Password: [reader's password]
>
> After logging in, you will be asked to update your password.

You can customize this reader welcome email. To do so:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Open the **Settings** tab.
4. Scroll to the **Reader Password Reset** section.



5. You can make changes to:
    - **From Name:** The name displayed when the email is sent.

      Some SMTP providers will ignore this From Name and will use the name associated with the email address/account configured in the SMTP service instead. If you aren't using your own Custom SMTP for this, the name should work. :)

    - **Reply To** email address: If someone replies to the email, this is the email address that it will send to. This can be any valid email address.
    - **Subject:** The subject line of the password reset email. This reset email is used for all knowledge bases in your account so if you have multiple knowledge bases, you may want to make it general/generic.
    - **Body:** The actual body of the email. This field requires straight HTML. (If you haven't worked with HTML before, you can create what you want in an article and then click the Code View or Source button to copy the HTML formatting!)

      Password and Login/Username are required.

        - The **-- Select a Merge Code --** dropdown at the bottom allows you to add KnowledgeOwl variables such as the reader's first or last name. The existing template uses the merge codes for:
            - Reader first name
            - List of KBs reader has access to

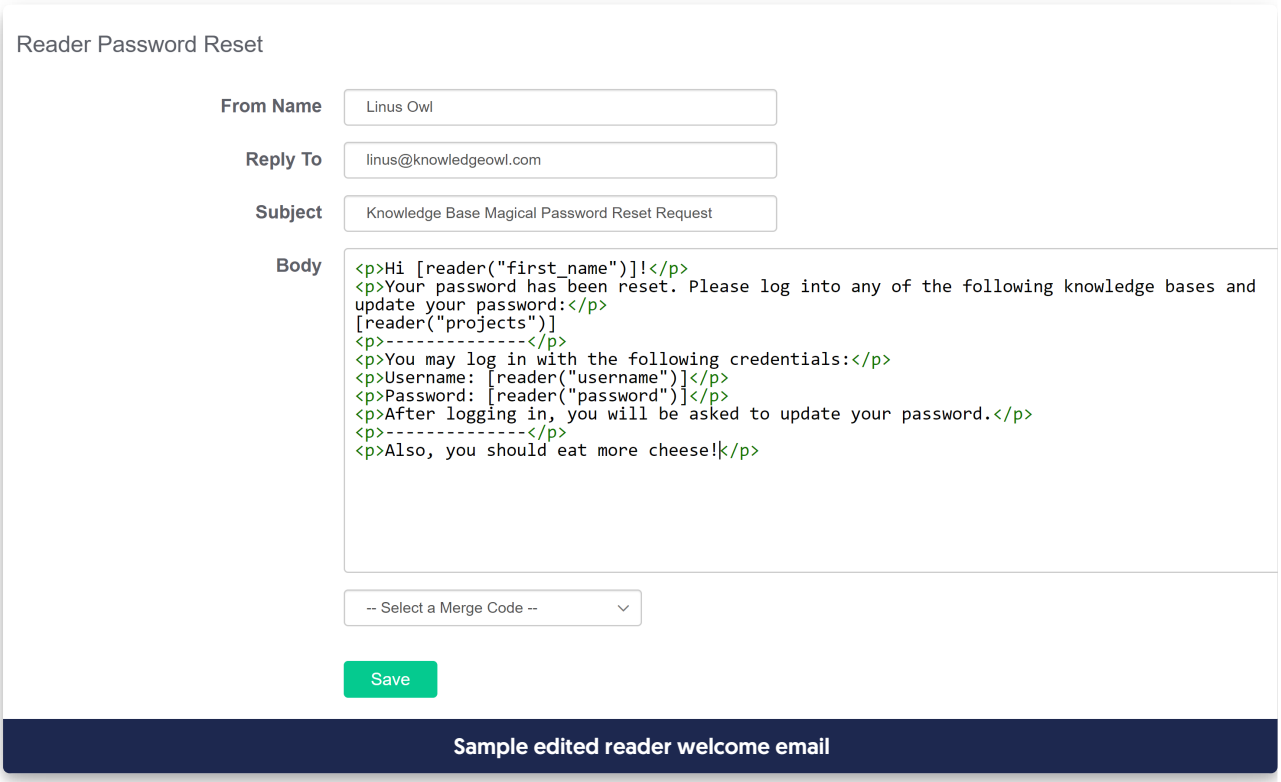
- Reader Login / Username
- Reader Password

6. Once you've finished making changes, **Save** the settings.



If you have multiple knowledge bases, this reader password reset email template is used for ALL of your knowledge bases.

Here's a sample change, where we've updated the From Name, Reply To, and Subject, and added a statement at the bottom:



Sample edited reader welcome email

Configure SMTP for reader emails

Last Modified on 05/29/2024 5:27 pm EDT

Readers may receive three types of emails from KnowledgeOwl:

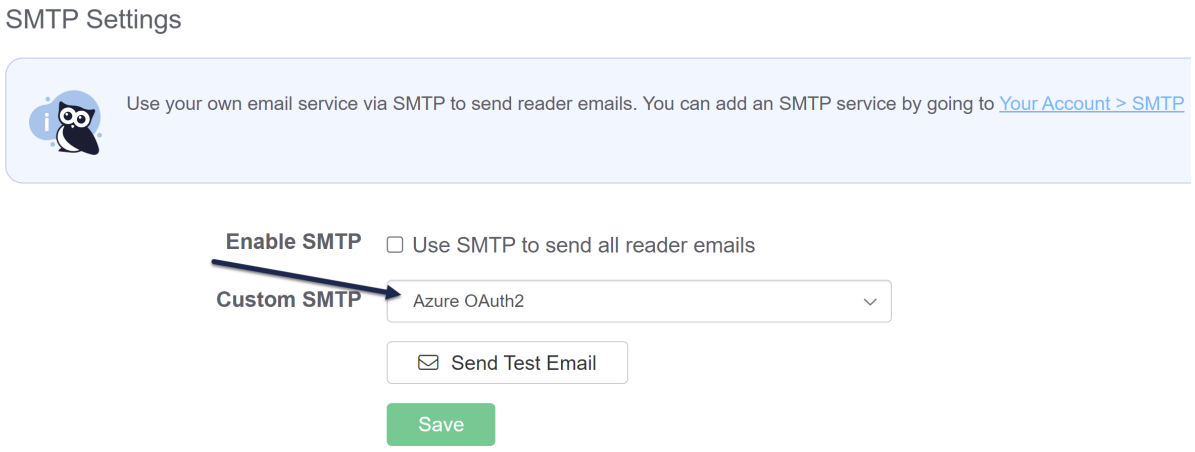
- **Reader welcome emails:** system-generated; sent when a reader is granted access to your knowledge base to send a welcome message with their login information
- **Password reset emails:** system-generated; sent when the reader has requested a password reset or an administrator has reset their password
- **Subscription notification emails:** optional; only sent when Subscriptions have been enabled + the reader has opted in to subscriptions + there is new/updated content to notify them about

The two system-generated reader emails (reader welcome and password reset) are sent from support@knowledgeowl.com. You can change the email address these are sent from, but sometimes that arrangement will flag the emails as spam. To ensure delivery of your reader welcome and password reset emails, you can configure your reader emails to use your own or a third-party SMTP email server.

To use this option, you must have at least one SMTP service defined in **Your Account > SMTP**. See SMTP for more information on configuring SMTP services.

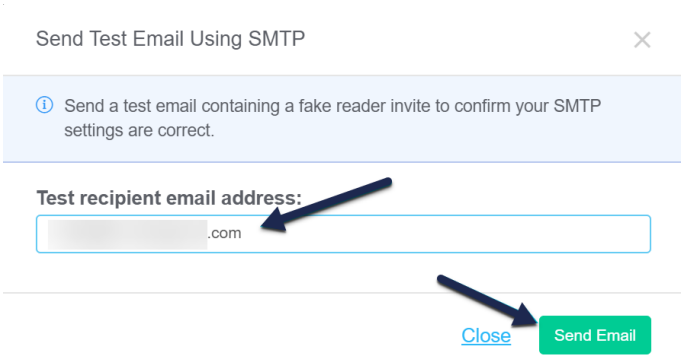
Once you're sure an SMTP service exists that you can use:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Open the **Settings** tab.
4. Scroll to the **SMTP Settings** section.
5. Select the SMTP service you'd like to use in the **Custom SMTP** dropdown. If there are no options, this means no SMTP service has been configured for your account. See SMTP for more information on configuring these services. (You'll likely need help from an IT admin!)



6. Once you've selected the **Custom SMTP** you'd like to use, click the **Send Test Email** button. This allows you to send a test email to confirm that the SMTP is properly working. It allows you to be sure all's well before you turn things on.

7. This will open a pop-up where you can specify the email address you'd like to send the test to. Enter the test recipient email address and click **Send Email.**

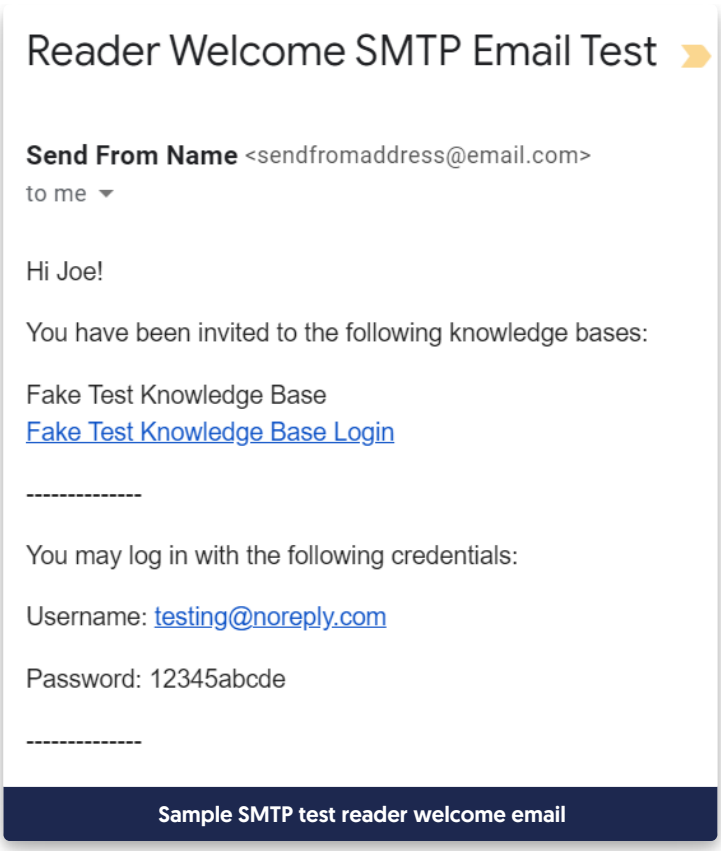


8. If anything is improperly configured, you'll get an error message. This should be one of two types:
    - **Basic validation:** we'll alert you if the email address you've entered doesn't follow standard email address conventions or if any fields have been left blank.
    - **SMTP provider validation:** if the error comes from the call to your SMTP provider, we'll return the error message they provide

9. If everything is properly configured, you'll see a confirmation message:

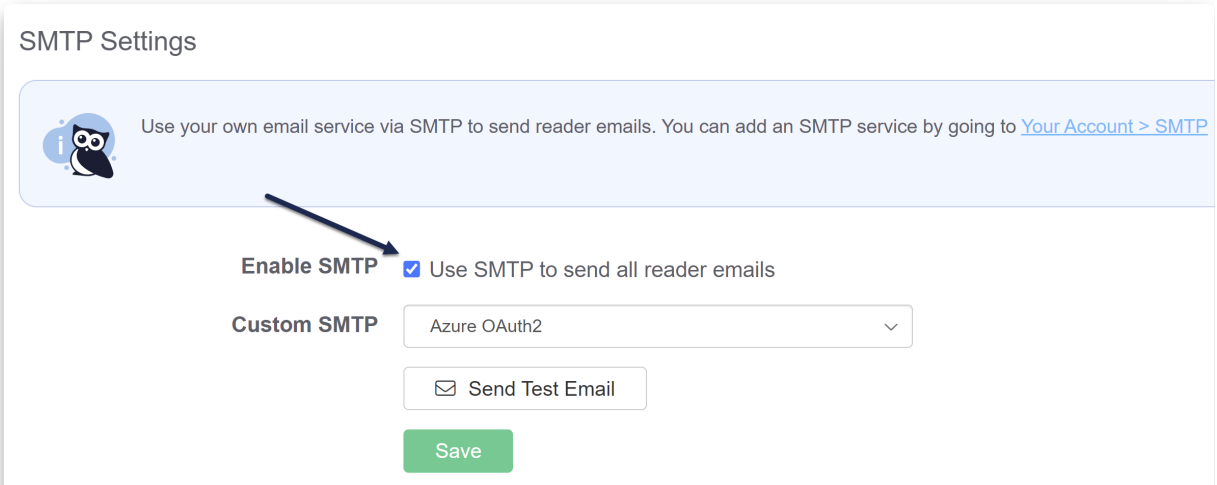


10. You should receive a sample reader welcome email containing some fake info. It should look something like this:



Sample SMTP test reader welcome email

11. **Once your test email looks good, check the Enable SMTP box to Use SMTP to send all reader emails.**



Enable SMTP and save

12. **Save your changes.**

All reader welcome emails and reader password reset emails will now send using the SMTP details you provided. See Customize your reader password reset emails and Customize your reader welcome emails for more information on further customizing those emails.

How custom SMTP from/reply impacts the email template from/reply to fields

Last Modified on 05/29/2024 5:28 pm EDT

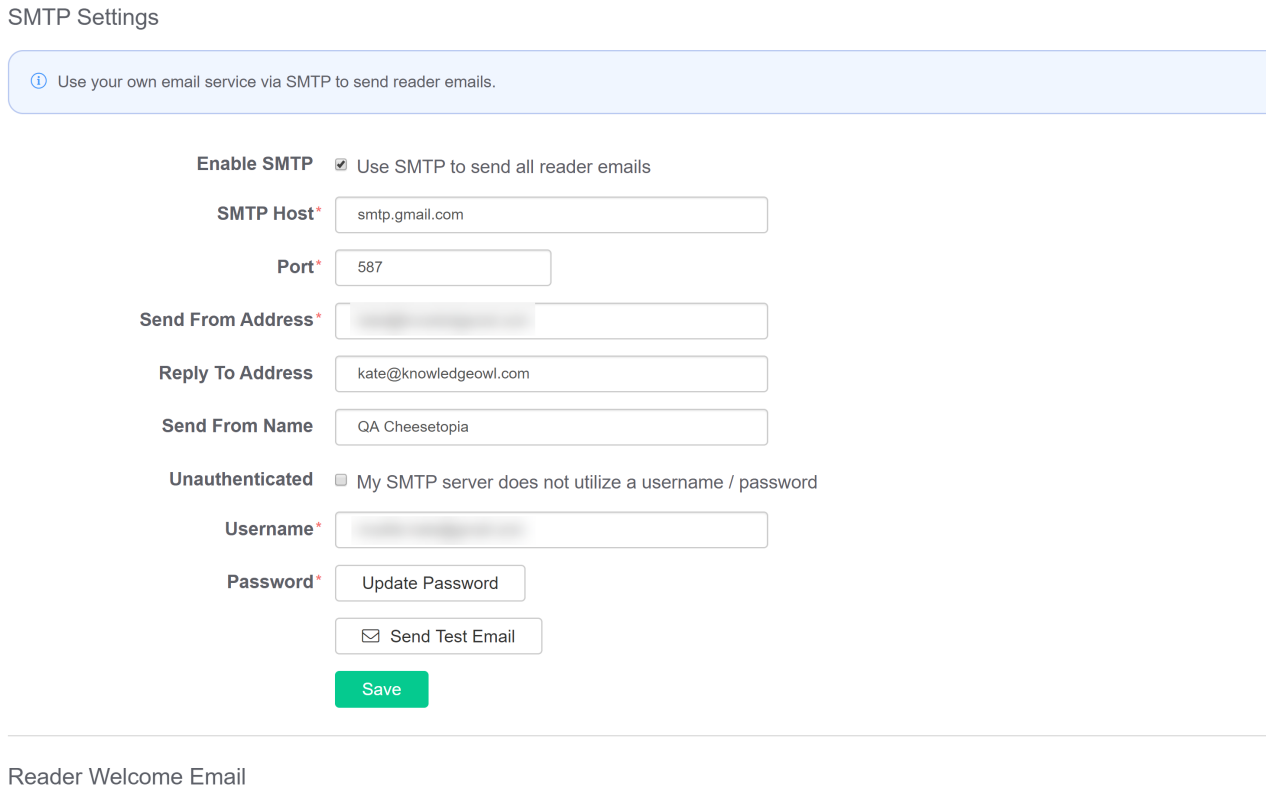
With each of the reader email templates, you can set custom **From Name** and **Reply To** fields. In the SMTP configuration, you also set a **Send From Name** and **Reply To** address.

When SMTP for reader emails is enabled, the SMTP Send From Name and Reply To address are used as the defaults.

So when the From Name or Reply To fields in the email template are left blank, the SMTP's Send From Name and Reply To settings are used. When the From Name or Reply To fields in the email templates have values entered, those values are generally used instead of the SMTP settings.

Some SMTP providers don't support separate Send From Addresses or Send From Names. In those cases, emails sent via SMTP will always use the address and name specified in the SMTP configuration, rather than what's used in the **Readers > Settings** email templates.

For example, let's consider this set-up:



From Name: Linus Owl

Reply To: linus@knowledgeowl.com

Subject: Knowledge Base Magic

Body:

```
<p>Hi [reader("first_name")]!</p>
<p>You have been invited to the following knowledge bases:</p>
[reader("projects")]
<p>--------------</p>
<p>You may log in with the following credentials:</p>
<p>Username: [reader("username")]<br />
<p>Password: [reader("password")]</p>
<p>--------------</p>
<p>We hope you like cheese</p>
<p>because we <strong>REALLY</strong> like cheese</p>
```

-- Select a Merge Code --

Reader Password Reset

From Name:

Reply To:

Subject: Knowledge Base Password Reset Request

Body:

```
<p>Hi [reader("first_name")]!</p>
<p>Your password has been reset. Please log into any of the following knowledge bases and
update your password:</p>
[reader("projects")]
<p>--------------</p>
<p>You may log in with the following credentials:</p>
<p>Username: [reader("username")]</p>
<p>Password: [reader("password")]</p>
<p>After logging in, you will be asked to update your password.</p>
<p>--------------</p>
<p>Also, you should eat more cheese</p>
```

The Reader Welcome emails will appear as coming from Linus Owl, and the Reply To address will be linus@knowledgeowl.com.

But the Reader Password Reset emails will default to the SMTP settings, so they'll show as coming from QA Cheesetopia with kate@knowledgeowl.com as the Reply To address.

Reader email delivery issues

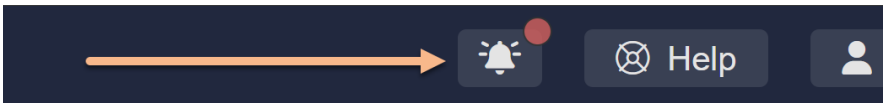
Last Modified on 05/29/2024 5:28 pm EDT

KnowledgeOwl generally sends three possible emails to readers:

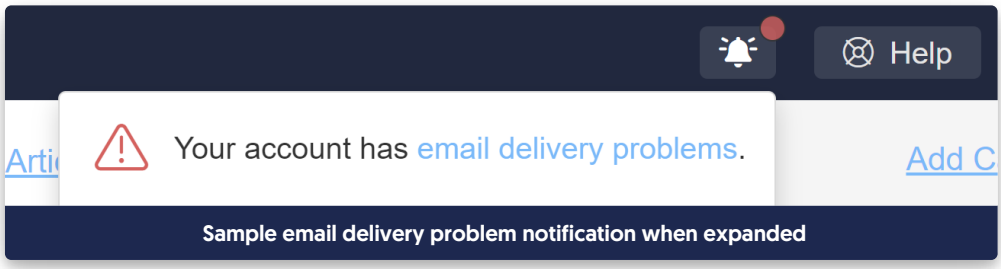
- Welcome email: Sent when a reader is given access to a new knowledge base
- Password reset email: Sent when a reader requests a password reset or an admin initiates a password reset for the reader
- Optional: Subscription emails

Welcome and password reset emails go through our email provider; subscription emails go through your own SMTP.

If we have trouble sending the welcome and password reset emails for any reason, a red notification dot appears over the notification bell in the site banner:



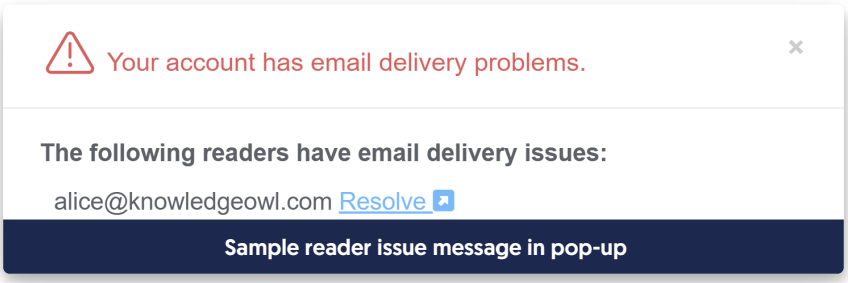
If you click on the notification bell icon, a message that your account has email delivery problems will appear:



Sample email delivery problem notification when expanded

Click the hyperlinked **email delivery problems** text to open a pop-up that tells you what delivery issues there are.

When reader email addresses have issues, we'll provide a list of the reader(s) impacted by the issues. Click the **Resolve** link next to each reader's name to jump straight to their details to try to troubleshoot what's going on.



Sample reader issue message in pop-up

Any readers with email issues will also display a red envelope next to their name in the **Readers** page:



Sample email delivery issue icon in the reader list

When you view the details for a reader who has email delivery issues, a warning message displays above their email address. This message varies based on what's going on with the reader. There are two basic scenarios you might see:

1. Email has issues but wasn't added to our suppression list
2. Email has issues and was added to our email suppression list: if this is the case, you'll see a green **Remove** button in the warning.

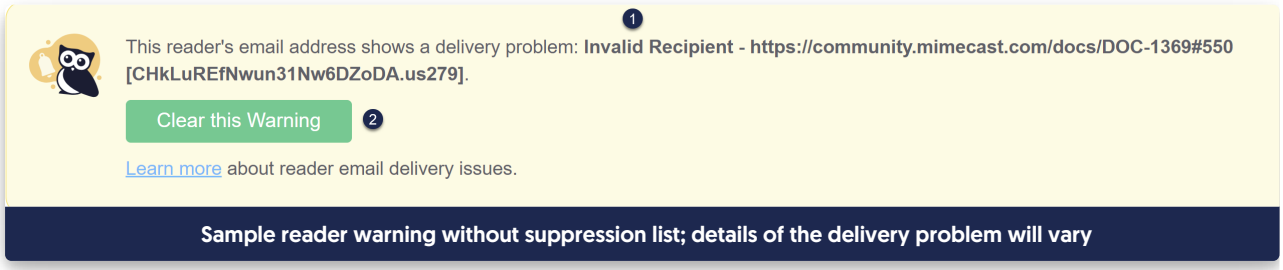
We'll walk through each scenario in more detail below:

Email has issues/not in suppression list

Email issues can crop up for any number of reasons, like migrating an email server, a temporarily full mailbox, and more. Many of these issues won't result in an email being added to the email suppression list. Some of them may resolve on their own; others may need explicit troubleshooting to resolve.

> Our delivery provider only captures these warnings at the time it tries to send an email, so it's possible that the issue we captured has already been resolved by the time you look at it. If the email isn't on the suppression list, you can just Clear the warning in these cases!

When the email hasn't been added to the email suppression list, the reader's warning will look a bit like this:



Sample reader warning without suppression list; details of the delivery problem will vary

The information provided here is intended to help you troubleshoot what's going on with the reader's email address:

1. If readers are internal to your organization, verify that the reader's email address is properly spelled. (You'd be amazed how often this is an issue for new reader accounts!)
2. Try sending an email to that address and see if you get a bounce/undeliverable message.
    - If you don't get a bounce, the issue may have already resolved itself, and you can proceed with the next step.
    - If you do get a bounce, the issue still requires troubleshooting. We recommend reaching out to you or your reader's email administrator with the delivery error message to expedite resolution.

- If your knowledge base allows Reader signups and this looks like a bad/bogus signup, consider deleting the reader account. No further troubleshooting is necessary if you delete the reader.

3. Once it seems like the reader's email can properly receive emails, click the **Clear this Warning** button to clear the warning and remove the banner from your site. The warning will reopen if we continue to experience any issues emailing this reader.

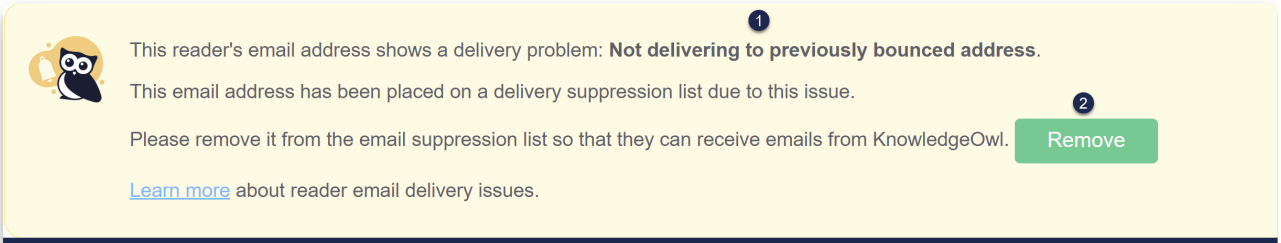
Email has issues and is in the suppression list

If an email address has had delivery problems and the address appears invalid, nonexistent, or misconfigured, it will also automatically be added to our mail provider's suppression list.

In these cases, even if the email address's underlying issue was resolved, KnowledgeOwl won't send any emails to the address until you remove it from the suppression list.

> Our delivery provider only captures these warnings at the time it tries to send an email, so it's possible that the issue we captured has already been resolved by the time you look at it. If that's the case, you'll only need to **Remove** the email from our suppression list.

When the email has been added to the email suppression list, the reader's warning will look a bit like this:



Sample reader warning message with suppression list Remove button

1. Our mail delivery provider captures the **error code or message** when email delivery fails. We'll display this back to you here. You can use this to help troubleshoot what's going on:
    a. If readers are internal to your organization, verify that the reader's email address is properly spelled. (You'd be amazed how often this is an issue for new reader accounts!)
    b. Try sending an email to that address and see if you get a bounce/undeliverable message.
        - If you don't get a bounce, the issue may have already resolved itself, and you can proceed with the next step.
        - If you do get a bounce, the issue still requires troubleshooting. We recommend reaching out to you or your reader's email administrator with the delivery error message to expedite resolution.
    c. If your knowledge base allows Reader signups and this looks like a bad/bogus signup, consider deleting the reader account. No further troubleshooting is necessary if you delete a reader.
2. Once it seems like the reader's email can properly receive emails, click the **Remove** button. This will:
    a. Remove the email address from our suppression list.

b. Clear the warning from the reader's details.

c. Remove the warning banner from within KnowledgeOwl.

The warning will reopen if we continue to experience any issues emailing this reader.

Reader password security

Last Modified on 05/29/2024 5:28 pm EDT

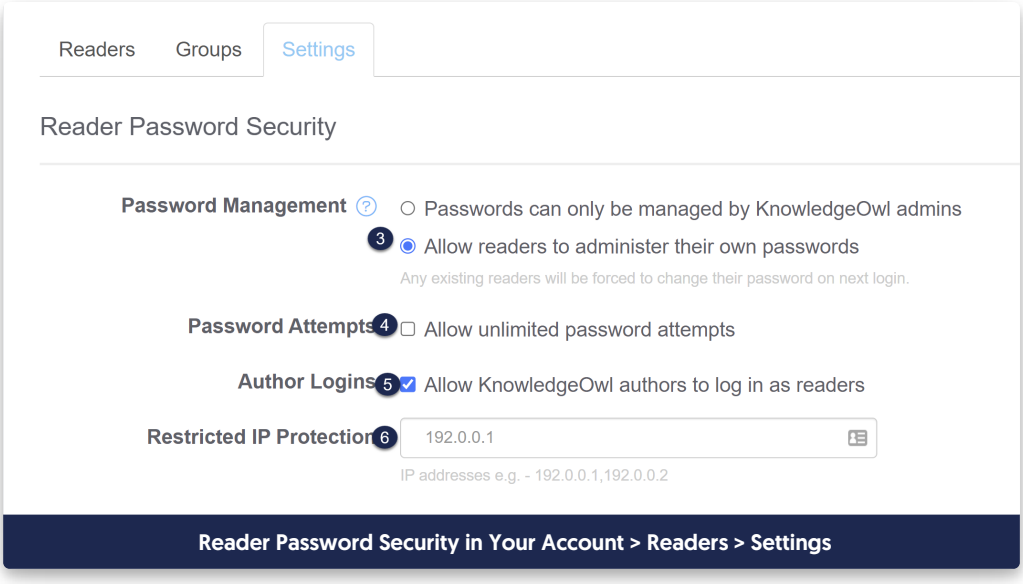
If you're using reader accounts in any of your knowledge bases, you'll need to set up your Reader Password Security. This helps to determine:

- Whether readers will administer their own passwords or if one of your admins will manage them
- How many failed password attempts are allowed
- Whether authors can log in as readers
- If readers must be accessing your knowledge base from a specific list of IP addresses

These settings are account-wide across all of your knowledge bases, though you have some options to override them in individual knowledge bases.

To review and set up these settings:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Open the **Settings** tab.
4. The Reader Password Security section will display at the top:



Reader Password Security in Your Account > Readers > Settings

5. **Password Management:** Choose whether you want to manage reader passwords or have them manage their own. Self-administered passwords are the default password management option. We recommend self-administered passwords because few people have time to deal with forgotten password issues. This is an account-wide setting but can be overwritten on individual knowledge bases for accounts with multiple knowledge bases under **Settings > Security**. See What's the difference between admin managed and self-administered reader passwords? for more information.



If you're using self-administered passwords, you'll also want to review the Self-

Administered Reader Options, the Reader Welcome Email, and the Reader Password Reset email settings.

6. **Password Attempts:** Choose whether or not you want to allow unlimited password attempts. By default, reader accounts are locked for 20 minutes following 3 unsuccessful attempts.
7. **Author Logins:** Choose whether to allow KnowledgeOwl authors to log in as readers (recommended; on by default).
8. **Restricted IP Protection:** Optionally restrict reader logins to a specific IP address or list of IPs as a form of two-factor authentication (password AND IP address).
9. **Case insensitive Logins:** If using admin managed passwords, choose whether or not you want the usernames to be case-sensitive.
10. Click the **Save** button at the bottom of the screen to save your changes.

What's the difference between admin managed and self-administered reader passwords?

Last Modified on 05/29/2024 5:28 pm EDT

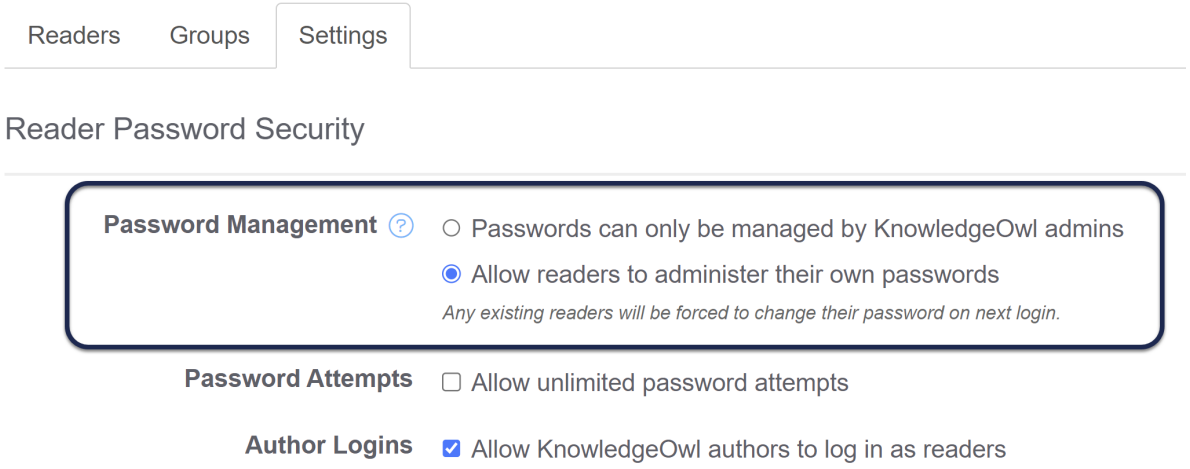
You have two options for reader password management:

- **Self-administered Passwords:** Allow readers to administer their own passwords by email (default)
- **Managed Passwords:** Passwords can only be managed by KnowledgeOwl admins

Allowing readers to administer their own password also enables reader welcome emails, password reset emails, and reader signups. Emails are not sent for managed passwords.

To toggle between the password management options:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Open the **Settings** tab.
4. The Password Management settings are the first option in the **Reader Password Security** section:



See below for more information on each password management type.

Self-administered passwords

Self-administered passwords are set and reset by the reader themselves via email. When using self-administered passwords, readers are sent a welcome email containing a temporary password and will be asked to update their password when they first log in.

If a reader forgets or wants to reset his or her password, there is a "Reset Password" option on the login page. Clicking "Reset Password" allows a reader to send a temporary password to their email address to create a new password. For this reason, reader usernames should be email addresses for self-administered passwords to work properly.

KnowledgeOwl admins can reset self-administered passwords either by sending a new temporary password or manually setting a temporary passwords; readers will be asked to update their password when they use the temporary one.

You can also customize reader welcome and reader password reset emails in the **Settings tab**. Reader emails are account-wide so the same email is sent for all knowledge bases in an account.



When creating readers with self-administered passwords, readers will automatically be sent a welcome email with their temporary password when you add a single reader or create readers from a spreadsheet.

If you do not want the welcome email sent when creating new readers, you can temporarily choose Managed Passwords, create the readers with an admin password, and switch back to Self-Administered Passwords. The admin password will then be used as a temporary password; readers will be asked to update them when they log in.

Managed passwords

Managed passwords can only be set and reset by a KnowledgeOwl admin (an author with **Full Admin** or **Reader Admin** permissions). When using managed passwords, you will need to give the reader their username and password through your own system. If the reader forgets their password, they will need to contact you to retrieve or reset it. No welcome or password reset emails are sent for managed passwords; all reader communication occurs outside of KnowledgeOwl.

When creating readers with managed passwords, you will need to set the password in the **Admin Managed Password** field when adding a single reader or have a column with the passwords when creating readers from a spreadsheet.

Account-wide password management

Reader settings are account-wide so the password management option will apply to all knowledge bases on an account by default. Self-administered passwords are the default option for password management.

Different password management for different kbs

You can choose to override the default account-wide password management option for individual knowledge bases under **Settings > Security.** By default, reader passwords will be set to "Use the account wide password management setting (default)".

You can choose to use the default or override the default for a particular knowledge bases. There are three options:

- Use the account wide password management setting (default)
- **Managed Passwords:** Passwords can only be managed by KnowledgeOwl admins
- **Self-administered Passwords:** Allow readers to administer their own passwords by email

Specifying the type of password management will override the default setting in Readers > Settings.

Set up self-administered reader options

Last Modified on 05/29/2024 5:28 pm EDT

If you allow readers to administer their own passwords, you should review the **Self-Administered Reader Options** in **Readers > Settings**.

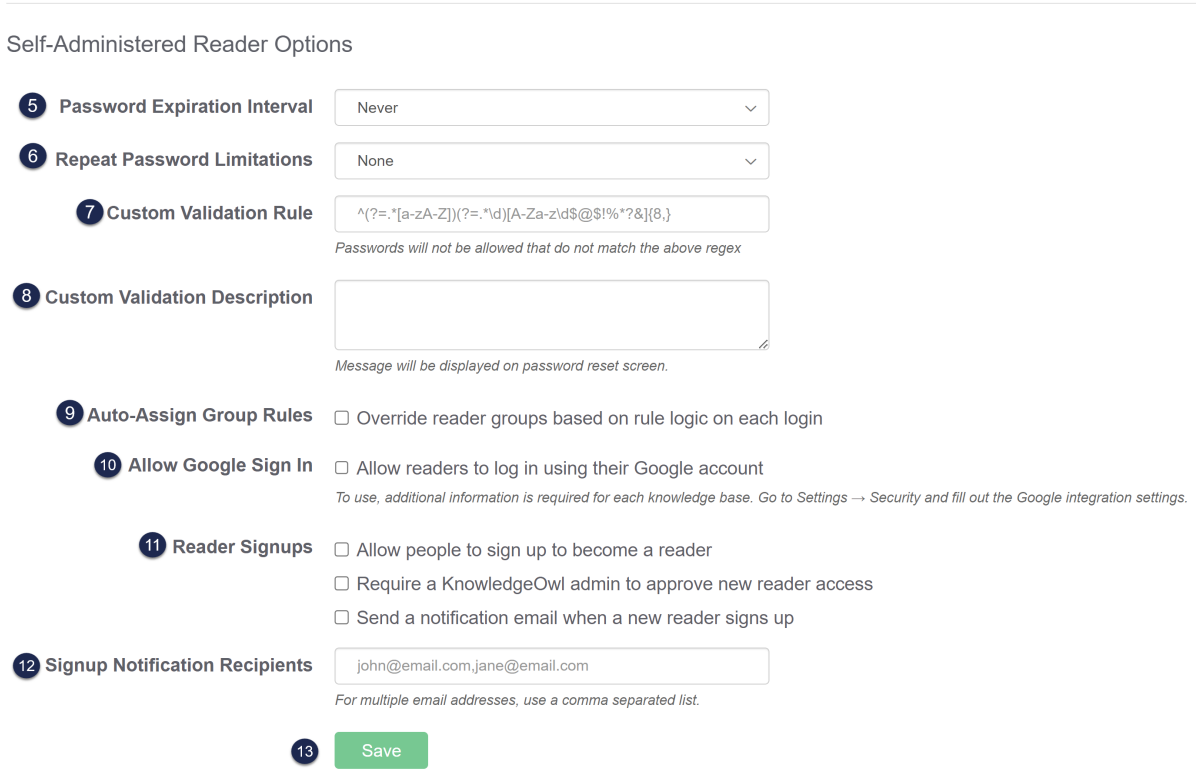
These help determine:

- How frequently passwords expire
- If readers are allowed to reuse passwords
- If passwords need to meet specific validation/complexity rules
- If reader signups are allowed, and what the process looks like if they are

Review and change settings

To review and update these settings:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Open the **Settings** tab.
4. If the box next to "Allow readers to administer their own passwords" is checked, scroll down to the **Self-Administered Reader Options** section:



5. **Password Expiration Interval:** Should reader passwords expire? And if so, how frequently should they expire? This setting determines how frequently reader passwords will expire, forcing readers to choose new passwords. The options are:
    - Never (default)
    - Every Month
    - Every 2 Months
    - Every 3 Months
    - Every 6 Months
    - Every Year
6. **Repeat Password Limitations:** Can readers reuse an existing password? This setting lets you choose whether and how to limit password reuse when resetting passwords. The options are:
    - None (default)
    - Cannot use previous password
    - Cannot use previous 2 passwords
    - Cannot use previous 3 passwords
    - Cannot use previous 4 passwords
    - Cannot use previous 5 passwords

7. **Custom Validation Rule:** Do you have company password requirements for complexity or format that you'd like to enforce? Use this setting to create your own password validation using RegEx. You can find prewritten validation rules using your favorite search engine. Refer to Regex for custom validation rules for more help.

8. **Custom Validation Description:** This message will be displayed on the password reset screen if you have a custom validation rule. Use it to tell your reader about the rule so they can create a password that works.

9. **Auto-assign Group Rules:** If you are using group rules to automatically assign your readers to groups, check this box to ensure that reader groups will update based on the rules each time a reader logs in. This allows you to create new rules and have it automatically applied to existing readers, but it will override any groups you might have set manually. **Do not choose this option if you are manually setting reader groups.**

10. **Allow Google Sign In:** You can allow readers to sign up for and log in to your knowledge base with their Google account. See Allow Google log in for readers for the additional steps to get Google Sign-in set up on your knowledge base.

11. **Reader Signups:** Add a reader signup link to your login page so readers can sign up on their own. By default, new readers will be added and a welcome email will be sent with a temporary password.
    a. You can choose to require an admin approval before the welcome email is sent.
    b. You can also set up notification emails to inform you of new reader signups or signup requests.

12. **Signup Notification Recipients:** If you're using reader signups, add the email address(es) you'd like to be notified when a new reader signs up or requests access.
    a. To add multiple addresses, use a comma-separated list, such as:
    `linus@knowledgeowl.com,owlbert@knowledgeowl.com.`

13. Click the **Save** button.

Regex for custom validation rules

By default, KnowledgeOwl does not enforce any password validation. You may wish to add rules forcing readers to use more complex passwords (for example, enforce a mixture of upper and lower case, numbers, and symbols). You can do this by entering a regex rule in the **Custom Validation Rule** field.

What is regex?

Regex is a common abbreviation of 'regular expressions'. Regular expressions are "a sequence of characters that specifies a *search pattern*. Usually such patterns are used by string-searching algorithms for "find" or "find and replace" operations on strings, or for input validation." (from Wikipedia - Regular expression).

This means that KnowledgeOwl takes the regex you provide, and uses it to check that the password the reader creates matches your requirements.

Regex password rule examples

Regex can be very powerful, and can look very complicated. Don't panic! If you're stuck, see if any of these examples meet your requirements. You can always contact us for more help.

Password rules	Regex	Modifications
Password must: • Be eight characters or more • Include at least one each of: number, symbol, lowercase letter, uppercase letter • Not contain whitespace	^(?=.*[0-9])(?=.*[a-z])(?=.*[A-Z])(?=.*[@#$%^&+=])(?=\S+$).{8,}$	• If you want to remove or add permitted symbols, change the contents of [@#$%^&+=] • If you want to change the character limit (for example, you want 12 as a minimum length, rather than eight), change the number in {8,}
Password must be eight characters or more. It can contain any characters apart from whitespace	^(?=\S+$).{8,}$	Change the 8 to any other number to alter the length restriction
Password must be between 12 and 24 characters long. It can contain any characters apart from whitespace	^(?=\S+$).{12,24}$	• Change the 12 to another number to alter the minimum length • Change the 24 to another number to alter the maximum length
Password must: • Be 16 characters or more • Include at least one each of: lowercase letter, uppercase letter • Not contain whitespace	^(?=.*[a-z])(?=.*[A-Z])(?=\S+$).{16,}$	Change the 16 to any other number to alter the length restriction
Password must: • Be between 12 and 128 characters. • Contain three out of four of: number, symbol, lowercase letter, uppercase letter • Have no more than two of the same character in a row	^(?:(?=.*\d)(?=.*[A-Z])(?=.*[a-z])|(?=.*\d)(?=.*[^A-Za-z0-9])(?=.*[a-z])|(?=.*[^A-Za-z0-9])(?=.*[A-Z])(?=.*[a-z])|(?=.*\d)(?=.*[A-Z])(?=.*[^A-Za-z0-9]))(?!.*(.)\1{2,})[A-Za-z0-9!~<>,;:_=?*+#."&§%°()|\[\]\-\$\^\@\/]{12,128}$	

A detailed example

It's fine to just use any of the examples from the list above, but if you want to learn a bit more about what they are doing and how regex works, here is a detailed explanation of one of the examples.

`^(?=.*[0-9])(?=.*[a-z])(?=.*[A-Z])(?=.*[@#$%^&+=])(?=\S+$).{8,}$`

- **^** tells us that we must match the pattern from the start of the line. For example, **^a** means to look for 'a' at the start of the line. It matches the 'a' in 'abc', but not in 'bca'.
- **(?=)** creates a positive lookahead. This means that it matches something followed by something else. For example, **h(?=o)** matches an 'h' followed by an 'o'. So it matches the 'h' in 'hoot' but not in 'hype'. In our example it's a bit more complicated, as we have chained multiple positive lookaheads together, and added some special characters.
- **.** matches any single character, and ***** tells us to match the previous token any number for times (from zero up). So **.*** means match any number of single characters. By itself this is meaningless: **.*** would match any phrase. In the context of our example, it means that the restriction that follows it (the bit in square brackets) can be preceded by any number of any other characters. For example, given the regex **.*[0-9]**, we'll match 'owl23', 'lotsOfOwls36', 'owlsWithSomeSymbols$48', and so on.
- **[]** ranges in square brackets match a single character in that range. For example, by itself **[0-9]** matches each number in '123owl456'. In our example, **[@#$%^&+=]** provides a list of symbols readers can use in their password.
- **\S** matches any non-whitespace character, and **+** tells us to match the previous character any number of times (from one up - so there has to be at least one character). **$** indicates the end of a line. To take one of our previous example phrases, 'abc', **c$** matches the 'c' at the end, in the same way that **^a** matches the 'a' at the beginning. In the context of our example, **\S+$** is there to ensure there are no whitespace characters in the password.
- **{8,}** tells us to match the preceding character (in this case, **.**, which matches any single character), eight or more times. In other words, there must be at least eight characters in the line for it to match. This means if you want a 12 character minimum length, you can change the 8 to 12.

Tips for creating your own regex rule

- Start the rule with **^**. This ensures we look for a password that matches your rule right from the start of the phrase that the reader enters.
- Include **(?=\S+$)** to ensure readers can't create passwords containing whitespace.
- Be aware that KnowledgeOwl uses PCRE (PHP) regex.

Learning more

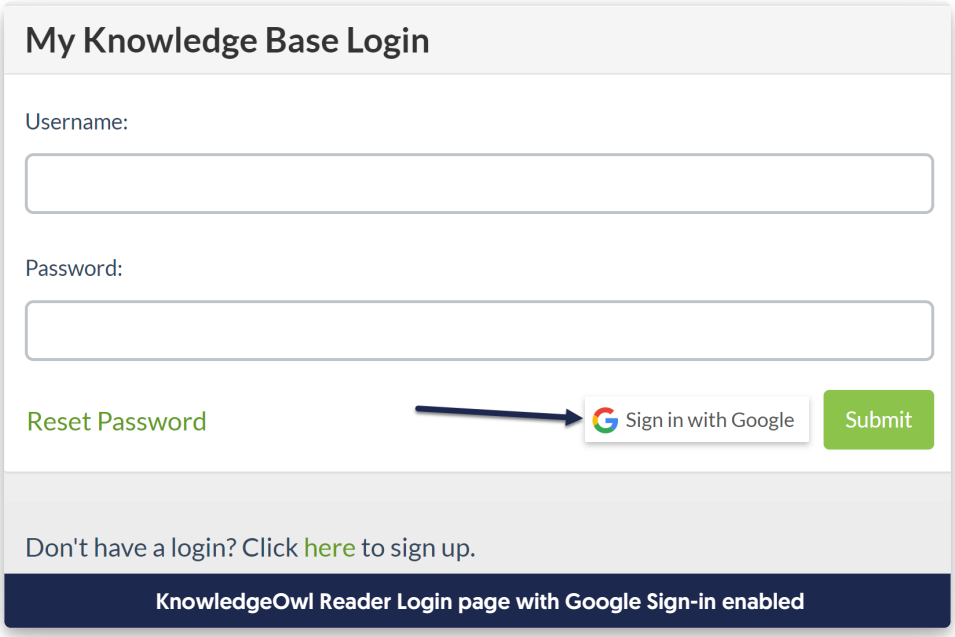
If you want to dive in and really learn regex, here are a few tips to get you started:

- Be aware different programming languages can have slightly different flavors of regex. If you're already familiar with/using a particular language, it's worth looking for regex tutorials specific to that language.
- regex101 is a handy site that allows you to try out Regex rules against example words and phrases. When testing regex for use in KnowledgeOwl, select **PCRE2 (PHP >= 7.3)** under **FLAVOR**.

Allow Google log in for readers

Last Modified on 05/29/2024 5:27 pm EDT

You can allow readers to sign up for and log in to your knowledge base with their Google account.



KnowledgeOwl Reader Login page with Google Sign-in enabled

To enable this option, you'll need to configure some things in Google Cloud Platform APIs & Services and in KnowledgeOwl.

In Google Cloud Platform, you'll need:

- A new project
- An OAuth consent form
- OAuth credentials

In KnowledgeOwl, you'll need access to:

- Settings > Security
- Your Account > Readers

Step 1: Create a Google Cloud Platform project (Google)

You must have a Google Cloud Platform project in order to complete the rest of the steps in this tutorial.

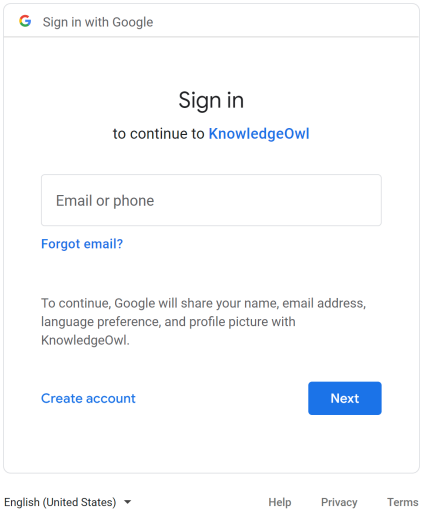
1. In Google Cloud Platform, go to Google credentials settings to open APIs & Services in Google Cloud Platform.
2. Click the option to **Create Project**.
3. Give your project a name (we recommend using the name of your knowledge base or "KnowledgeOwl" as the project name).

4. Add an organization and location (if appropriate).

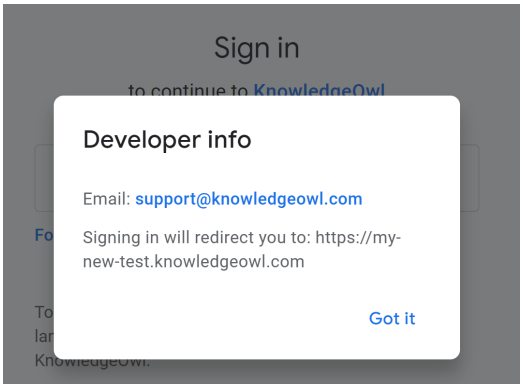
Step 2: Set up your Google Project's Oauth Consent Screen (Google)

Google requires an Oauth consent screen. For more details, see See Google Cloud Platform Console Help's instructions for Setting up your OAuth consent screen. We cover this only at a high level. Set up your OAuth consent screen by clicking the **Configure Consent Screen** button.

1. Click the **Configure Consent Screen** button.
2. Select a **User Type**.
    - External lets any user with a Google account sign up; Internal restricts to users within your Google Cloud Organization. You must make a selection here before you can complete configuration. External does require additional verification, not covered by this guide.
3. On the OAuth consent screen, in the **App information** section, at minimum, these fields are required:
    - **App name:** This is displayed in the "Sign in to continue to [app name]" portion of the Google login process and in the "To continue, Google will share....with [app name]." In our screenshot, we've used "KnowledgeOwl" and you can see where it displays:



    - **User support email:** In the Google login process, if you click on the hyperlinked App name, this is the email address that is displayed in the Developer info box that appears. Here, we've used our support email address:

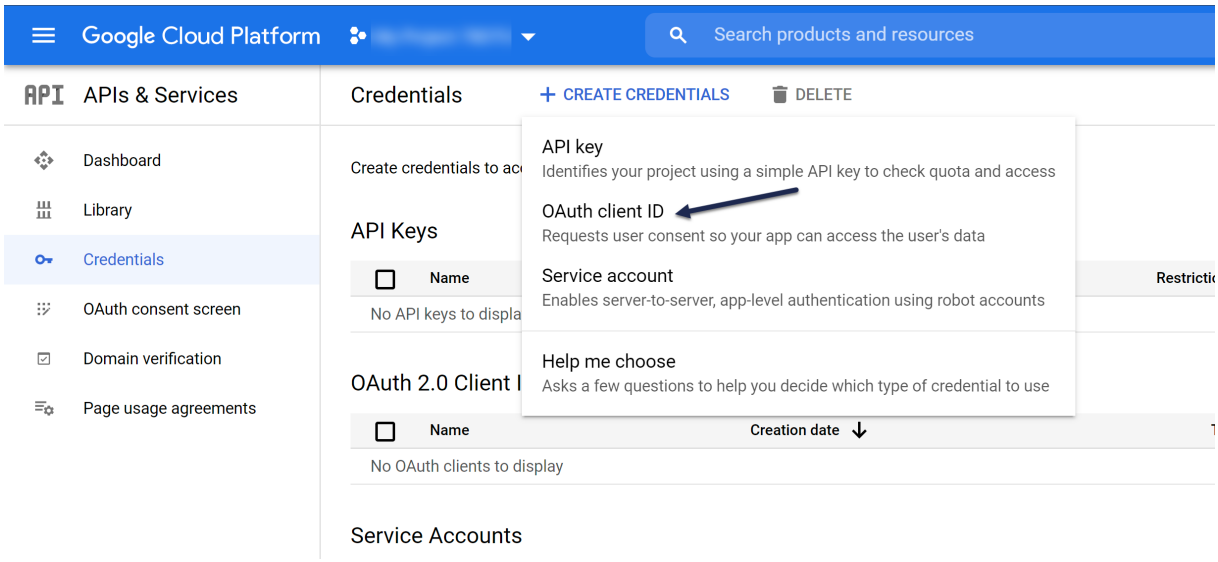


4. On the OAuth consent screen, in the **Developer contact information**, add an email address. This is not displayed anywhere--Google uses it to notify you of changes.
5. Add other fields in various sections as appropriate for your configuration.
6. Click **Save and Continue**.
7. Set the **Scopes** for your consent screen. See Google's documentation for guidance here.
8. Click **Save and Continue**.
9. *Optional:* If you're doing an External User Type, you'll be prompted to add any **Test users**. (We do recommend using these if you're testing an External User Type.)
10. Once you're done, Google generally displays a Summary page.

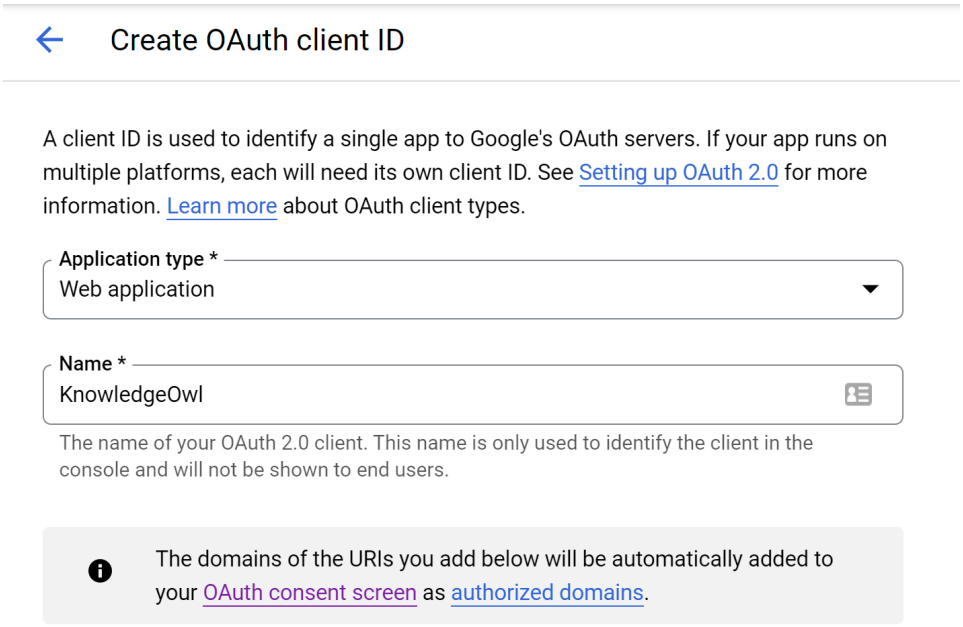
Step 3: Set up the OAuth client credentials (Google + KO)

In this step, you'll copy redirect URLs from KnowledgeOwl into your Google Cloud Platform project.

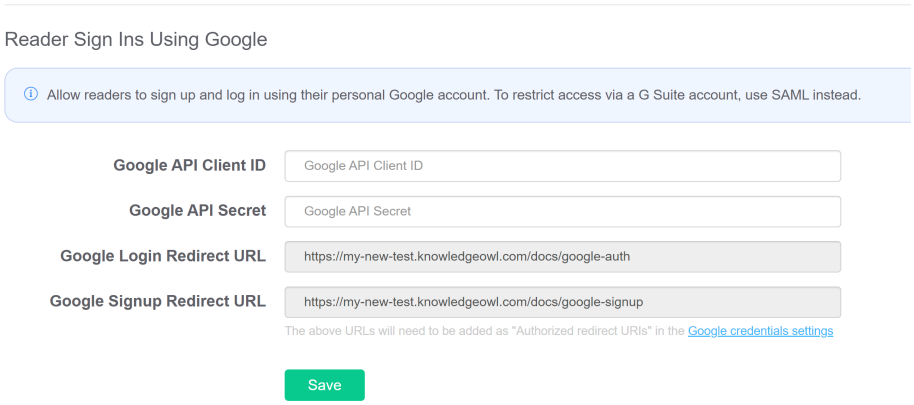
1. In Google Cloud Platform, go to **Credentials**. (This is generally always present in a menu on the left, at the time this documentation was written.)
2. At the top, click the **+ Create Credentials button**.
3. Select the option to create an **OAuth client ID**.



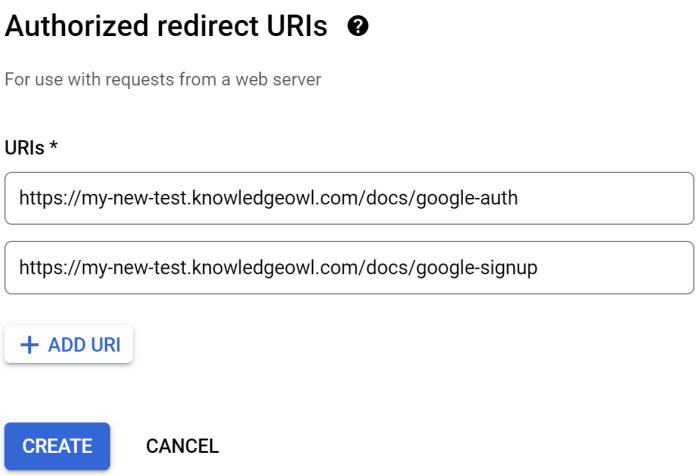
4. For **Application type**, select "Web application."
5. Enter "KnowledgeOwl" as the name.



6. **In the Authorized redirect URIs, you'll paste in some information from KnowledgeOwl:**
    a. **In KnowledgeOwl, go to Settings > Security.**
    b. **Go to the Reader Sign Ins Using Google section at the bottom of the page.**

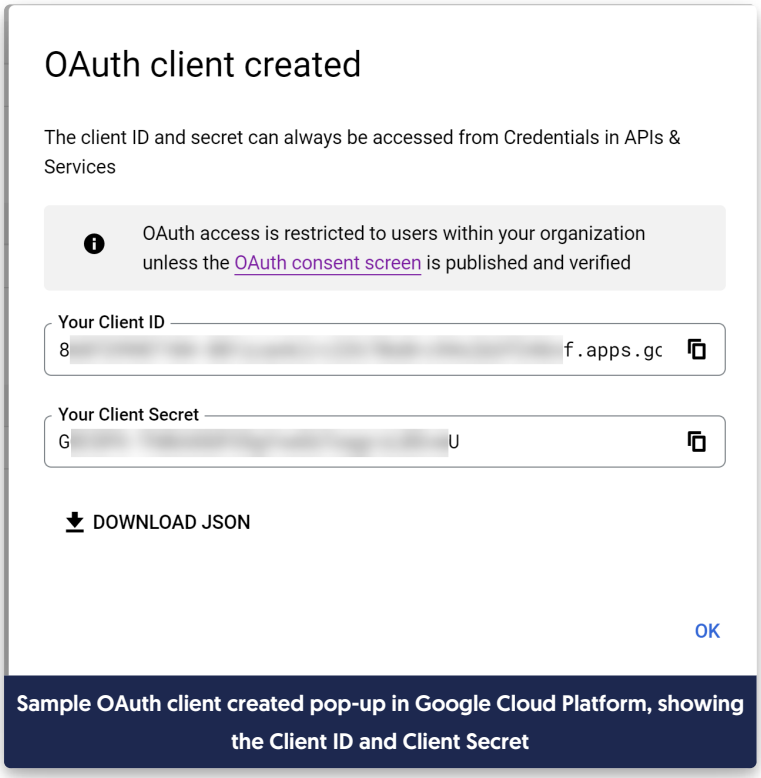


    c. **Copy the Google Login Redirect URL and the Google Signup Redirect URL.**
    d. **Add these as Authorized redirect URIs in Google Cloud Platform.**



7. **Once you've added both authorized redirect URIs in Google Cloud Platform, select the Create option there to finish creating your credentials.**

8. **This will display the Oauth Client ID and Secret you need in the next step!**



Sample OAuth client created pop-up in Google Cloud Platform, showing the Client ID and Client Secret

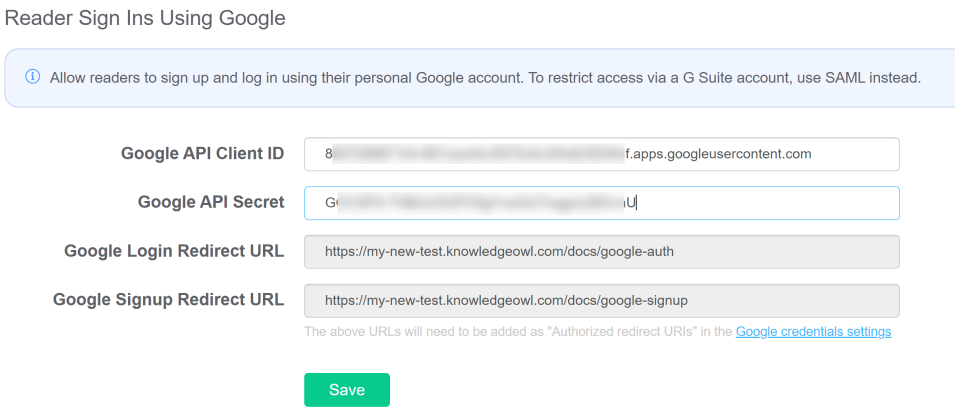
Step 4: Add your Google Cloud Platform Client ID and Secret (KO + Google)

In this step, you'll copy the Oauth Client ID and Oauth Secret generated above into KnowledgeOwl.

1. **In KnowledgeOwl, go to Settings > Security.**

2. **Go to the Reader Sign Ins Using Google section at the bottom of the page.**

3. **Paste your Client ID and Client Secret from Google Cloud Platform into the corresponding fields in KnowledgeOwl.**

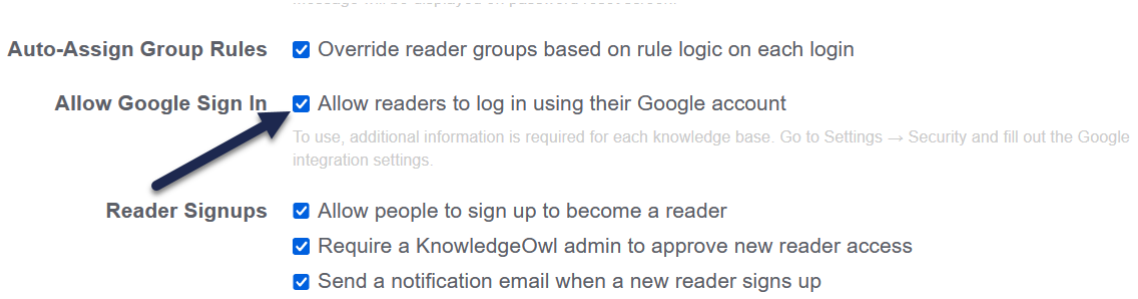


4. **Save your KnowledgeOwl Security Settings.**

Step 5: Turn on Google login for readers (KO)

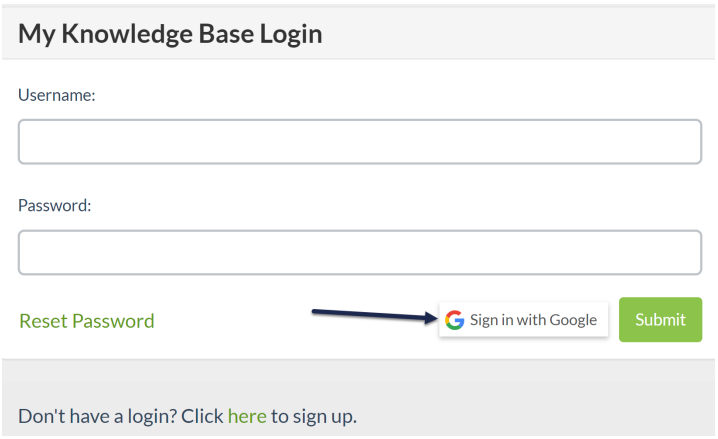
With all of the configuration done, you can now enable Google login for readers in KnowledgeOwl! To do so:

1. Go to **Your Account > Readers.**
2. Open the **Settings** tab.
3. In the **Self-Administered Reader Options** section, look for **Alow Google Sign In.**
4. Check the box next to "Allow readers to log in using their Google account".



5. *Optional:* to allow readers to sign up for access to your knowledge base, you'll need to check the box next "Allow people to sign up to become a reader." See Using reader signups for more details on reader signup options.
6. **Save** your changes.

Your Reader Login page will now display a Sign in with Google button. If you've enabled reader sign-ups, the reader sign-up link will display below the login section:



Allow readers to log in through SSO

Last Modified on 05/29/2024 5:27 pm EDT

Do you already have a Single Sign-On provider? You can set up a SAML/SSO integration to allow your readers to login using those same credentials.

Review the configuration options available at Single Sign-On (SSO).

Help readers reset their passwords

Last Modified on 05/29/2024 5:28 pm EDT

If you use self-administered reader passwords, readers should be able to reset their password without your help, using the **Reset password** link on the login page. You can Set up self-administered reader options to configure things like password expiry.

Refer to What's the difference between admin managed and self-administered reader passwords? to learn more about the different types of reader password management.

If you need to manually reset a reader's password:

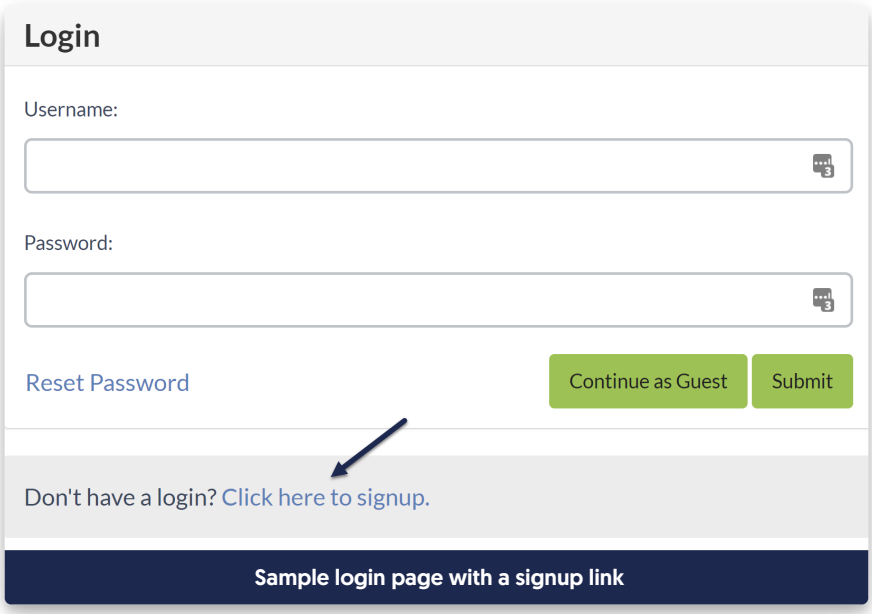
1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Select the reader.
4. Follow the steps for your reader password management type:
    - For self-administered readers:
        1. Select **Reset Self-Administered Password**.
        2. Choose either:
            - **Email reader a randomly generated temporary password**: this has the same effect as the reader going through the password reset process.
            - **Assign a custom temporary password**: when you select this, KnowledgeOwl shows a **Temporary Password** field, allowing you to enter a temporary password of your choice. When you use this option, KnowledgeOwl does not automatically send an email with the new password. You must email the password to the reader.
    - For admin-managed readers, Enter a new password in the **Admin Managed Password** field.
5. Select **Save** to apply your changes.

Reader signup overview

Last Modified on 05/29/2024 5:28 pm EDT

If your knowledge base is set up so that some or all readers must login to see content and you're using KnowledgeOwl reader accounts rather than an SSO integration, you can allow your readers to sign up for access. This can help reduce administrative time and oversight so that readers can request access without you having to manually create accounts for them.

With signups enabled, your login page will show a link for new visitors to sign up for access:



Sample login page with a signup link

You have several options when adding signups:

- You can have new sign-ups automatically granted a reader account as soon as they sign up OR require an admin to approve their access
- You can choose to send email notifications when a new reader has signed up
- You can include up to five custom fields to gather additional information about readers when they sign up
- You can auto-assign new reader signups to reader groups based on their email address domain

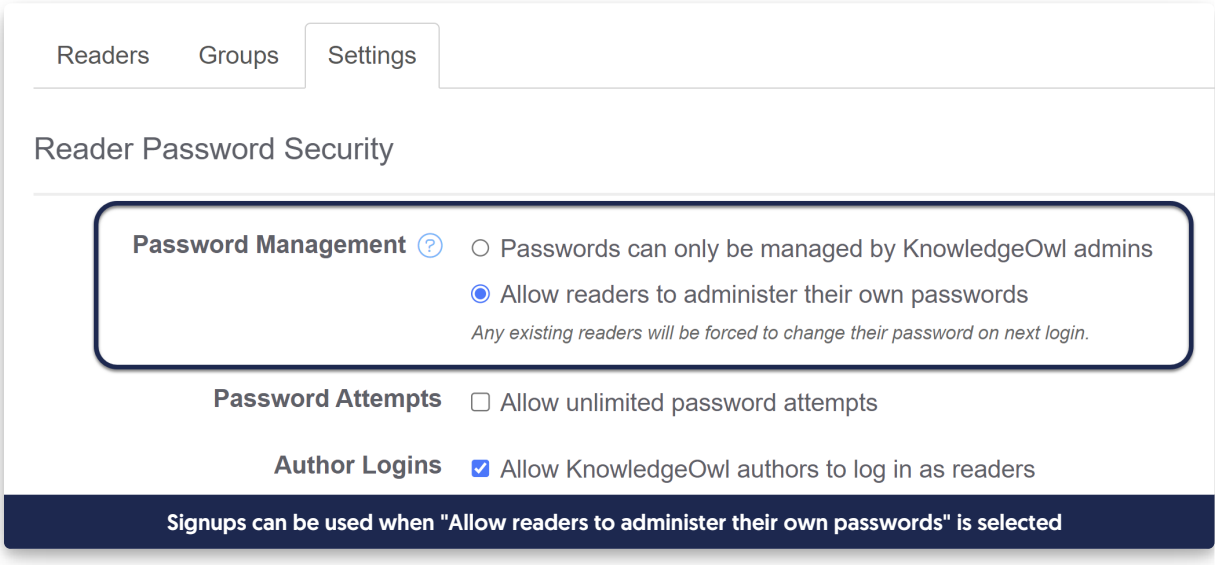
This option won't work if you're using SSO!

Enable reader signups

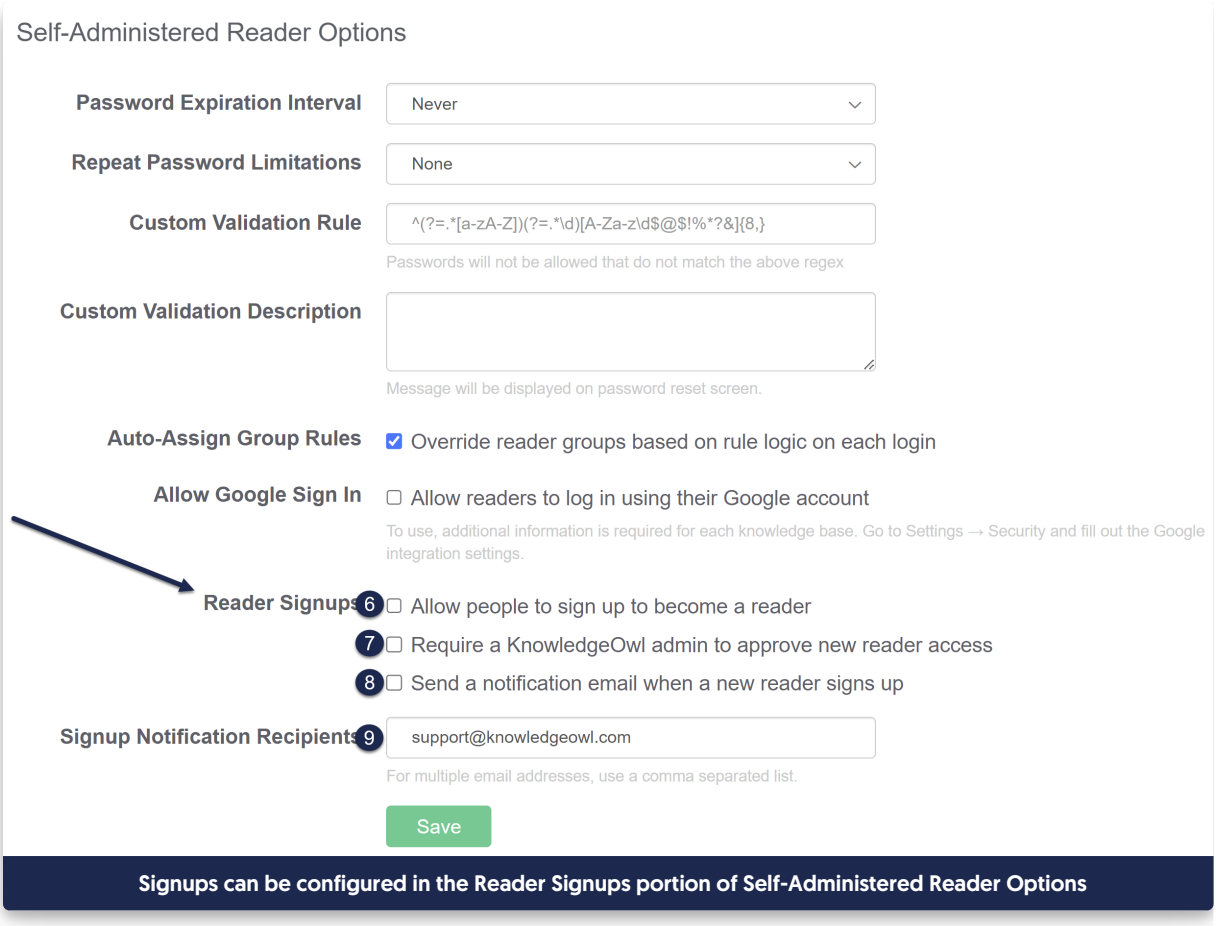
Last Modified on 12/05/2024 1:34 pm EST

To enable reader signups:

1. Select your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Open the **Settings** tab.
4. Make sure that **Password Management** is set to "Allow readers to administer their own passwords". See Set up self-administered reader options for more information. If "Passwords can only be managed by KnowledgeOwl admins" is selected, you cannot enable reader signups.



5. Scroll down to the **Self-Administered Reader Options** section.
6. Look for the **Reader Signups** section.



7. To turn on reader signups, check the box next to **Allow people to sign up to become a reader.**

> **Spam protection**
> The reader signup page doesn't have its own spam protection settings; it inherits them from the Contact Form. We're working to add a separate setting for this. Until that's released, please make sure you have spam protection turned on in the Contact Form to block spam on your reader signups!

8. If you'd like readers to automatically be given an account as soon as they sign up, leave the box next to **Require a KnowledgeOwl admin to approve new reader access** unchecked. If you'd like to require admin approval, check this box.
    - If you leave this box unchecked, new reader signups will receive a welcome email with a temporary password immediately after they sign up. This allows new readers to sign up and gain access to your site without any approval process.
    - If you check this box, a welcome email and password will not be sent until an administrator approves the signup request. New readers won't have any access until an admin has approved them. When a new reader signs up, they will be added to **Readers** in the Pending Approval list. You will see an alert on top of the Readers list if you have new readers awaiting approval, and you can filter the readers list to only view those pending approval by selecting the "Pending Approval" filter on that page.
    - See Approve Reader Signups for more information.

9. If you'd like to be alerted when new readers sign up, check the box next to **Send a notification email when a new reader signs up**. Notifications are especially helpful if you want to manually add the reader to groups to give them access to restricted content or you require approval before the new reader can access the site.

10. If you checked the box next to **Send notification email when a new reader signs up**, be sure to add at least one email address to the **Signup Notification Recipients** list. These are the email addresses that will receive the signup notifications. To add multiple email addresses, use a comma-separated list.

11. Be sure to **Save**.

Change the default text of the reader signup form

Last Modified on 05/29/2024 5:27 pm EDT

You can customize all of the text in the reader signup form using the Customize Text tool, as well as the signup prompt text and link on the main reader login form.

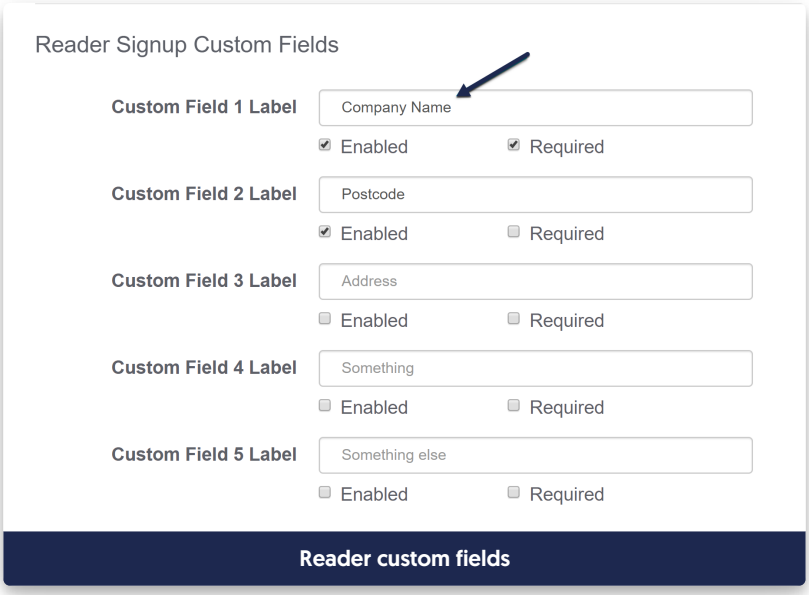
See Section breakdown: Reader Login for more details on the various text strings you can customize here.

Do you want to capture some additional information besides first name, last name, and email address about your readers? See Add custom fields to the reader signup form!

Add custom fields to the reader signup form

Last Modified on 05/29/2024 5:27 pm EDT

By default, the reader signup form requires an email, first name, and last name. You can choose to include up to 5 additional fields that will be mapped to reader custom fields 1-5. These fields will be included in the signup and in your notification emails (if you're using notification emails).

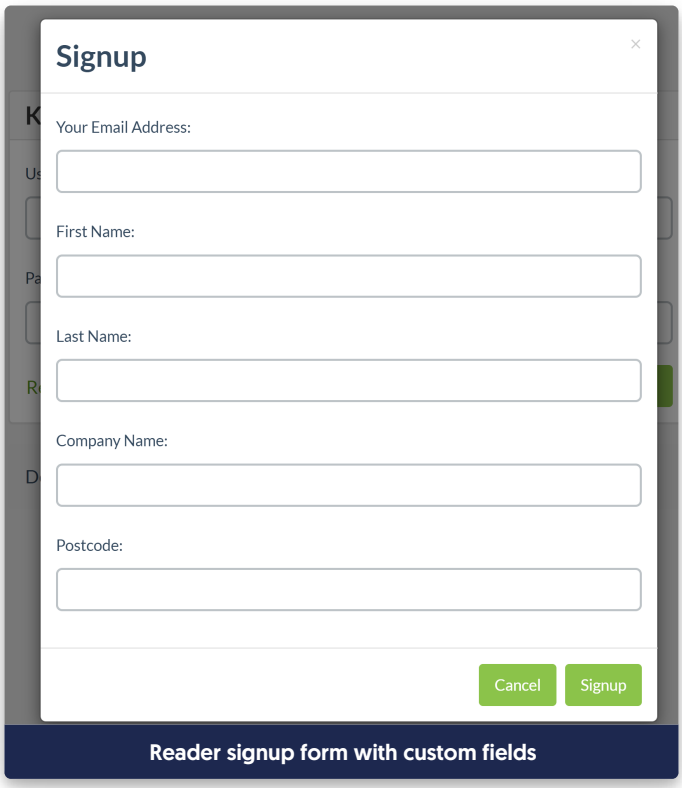


To add custom fields to the signup form:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Open the **Settings** tab.
4. Scroll down to **Reader Signup Custom Fields** section.
5. Add labels for each field. The labels are what will be displayed on the signup form next to the field.
6. If you want the field to be displayed in your reader signup form, check the **Enabled** box.
7. If you want to require the reader to complete this field before they can submit the signup form, check the **Required** box.
8. Click **Save**.

For example, in the screenshot above, both the Company Name and Postcode fields will be included, but only the Company Name field will be required.

The custom fields will be added to your signup and will also be included in your notification emails:

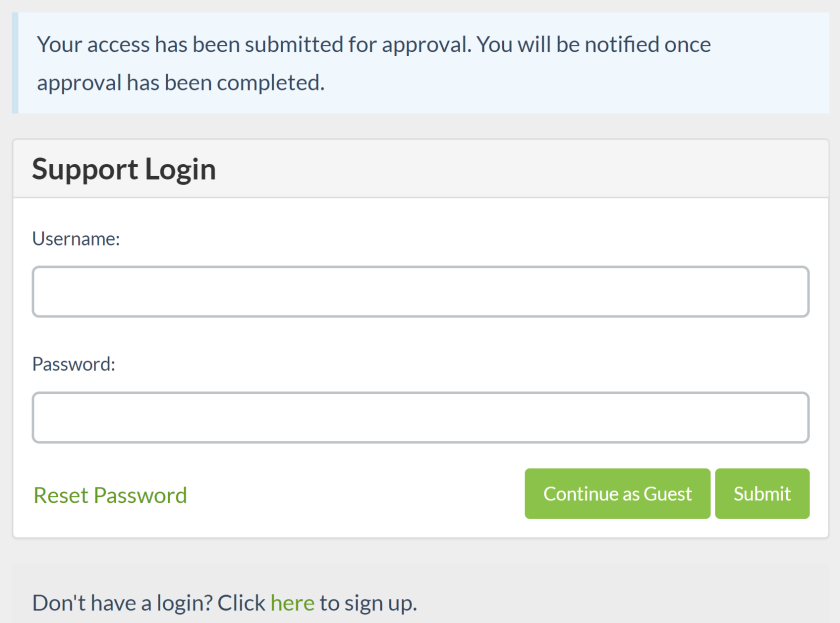


Reader signup form with custom fields

Approve or deny single new reader

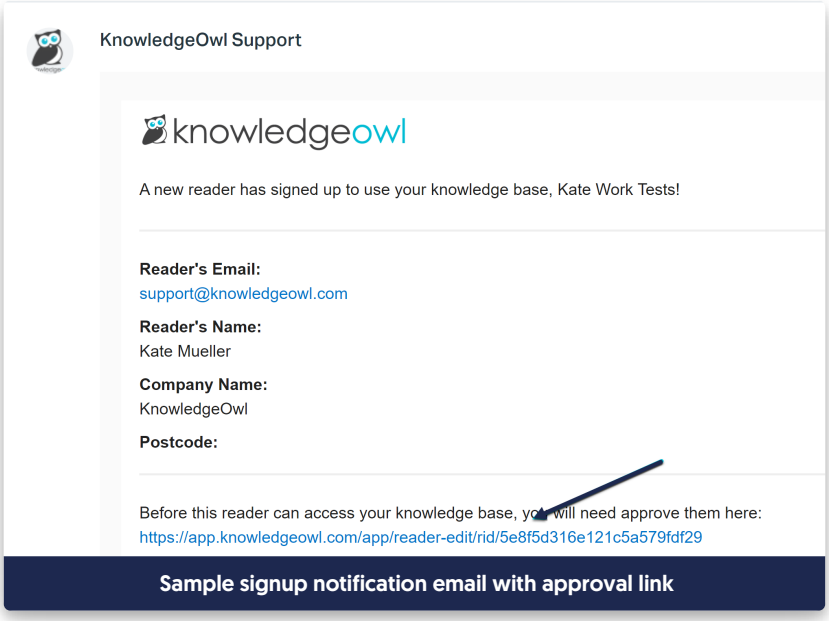
Last Modified on 05/29/2024 5:27 pm EDT

When a new reader signs up and you require approval, they will see a message like this:



They will be added to your account's Readers list as pending approval.

If you have signup notifications enabled, the email you receive will have a link in it to approve the reader:



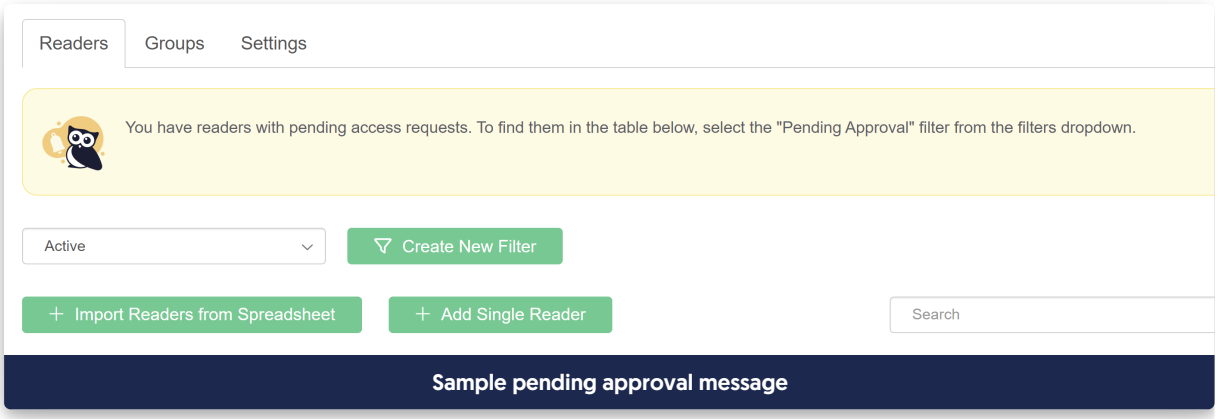
Sample signup notification email with approval link

That will take you directly to step 7 below.

If you aren't using notifications, or if you'd like to complete this step while already logged in to

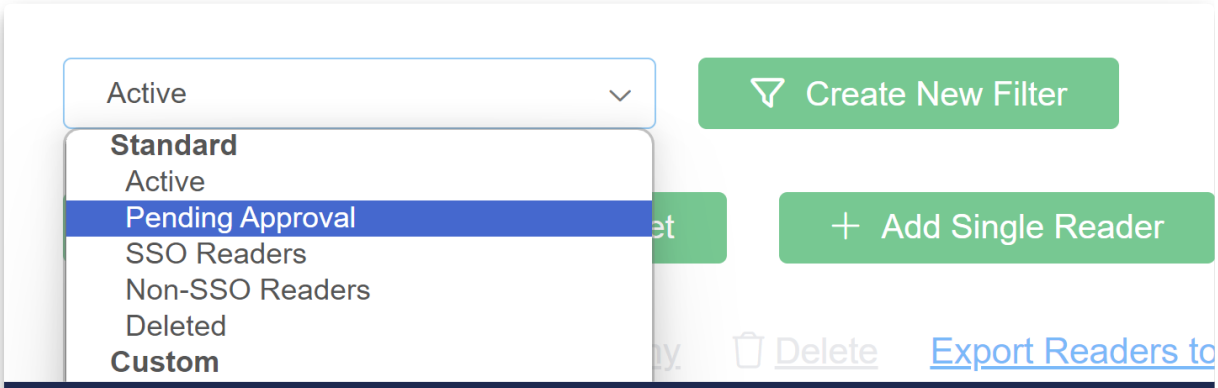
KnowledgeOwl:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. You will see an alert on top of the Readers list if you have new readers awaiting approval:



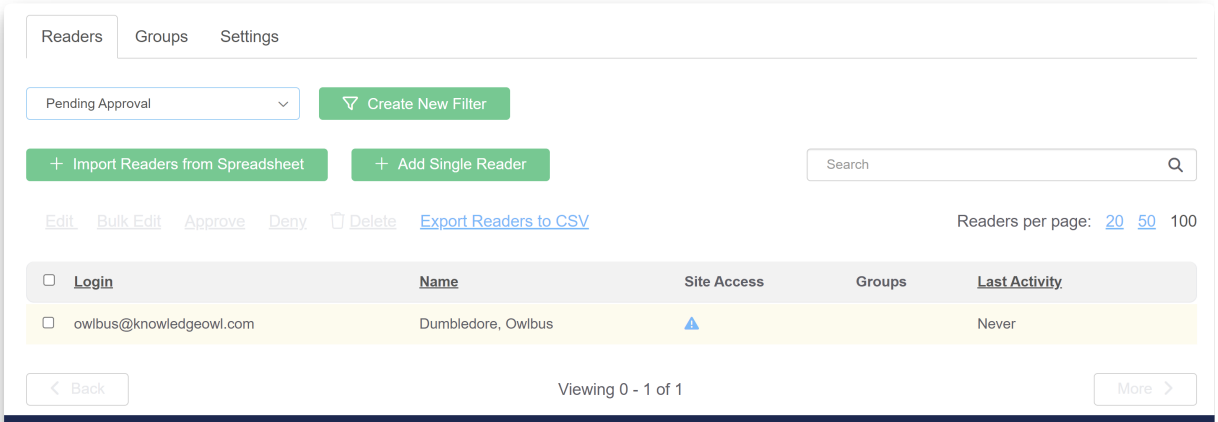
Sample pending approval message

4. Click the filter dropdown to select the Pending Approval filter:



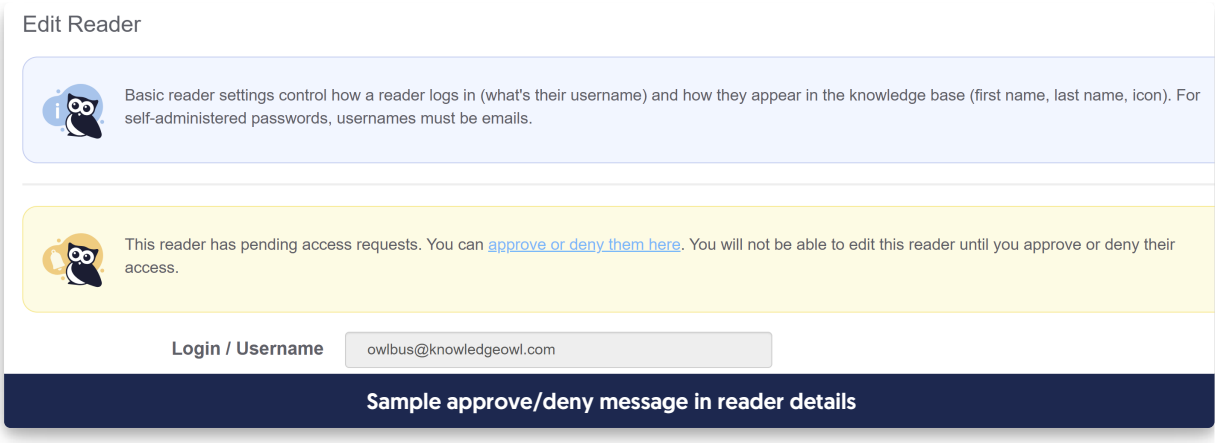
Select the Pending Approval filter from the dropdown

5. This will display a list of all readers pending approval:



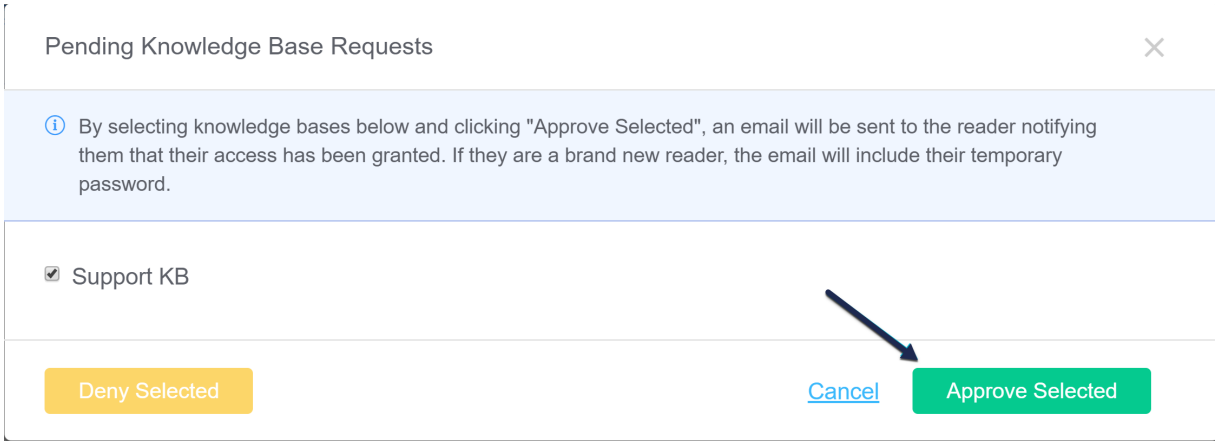
Sample Pending Approval filter display

6. Click on the reader's login, name, or anywhere else in that row.
7. This will open the reader's details in a new tab.
8. Click on the link that says **approve or deny them here:**



Sample approve/deny message in reader details

9. **Here you can choose to Deny or Approve their access. If you approve them, their reader account will be given access and we will send them the reader welcome email with a temporary password.**



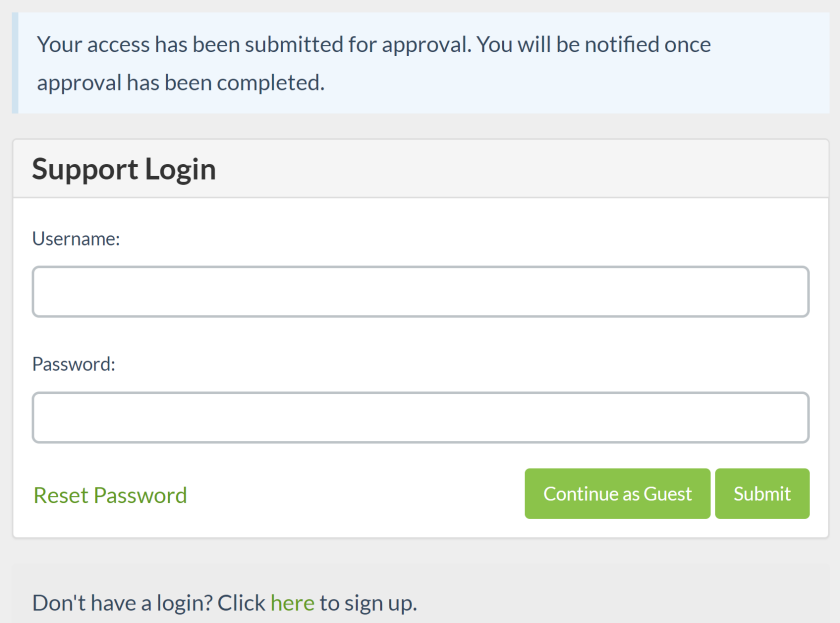
10. **Once you have approved the reader, you can assign them to reader groups in the Reader Groups section.**

11. **If you do make changes to the reader's details, be sure to Save once you complete those changes.**

Approve or deny multiple readers

Last Modified on 05/29/2024 5:27 pm EDT

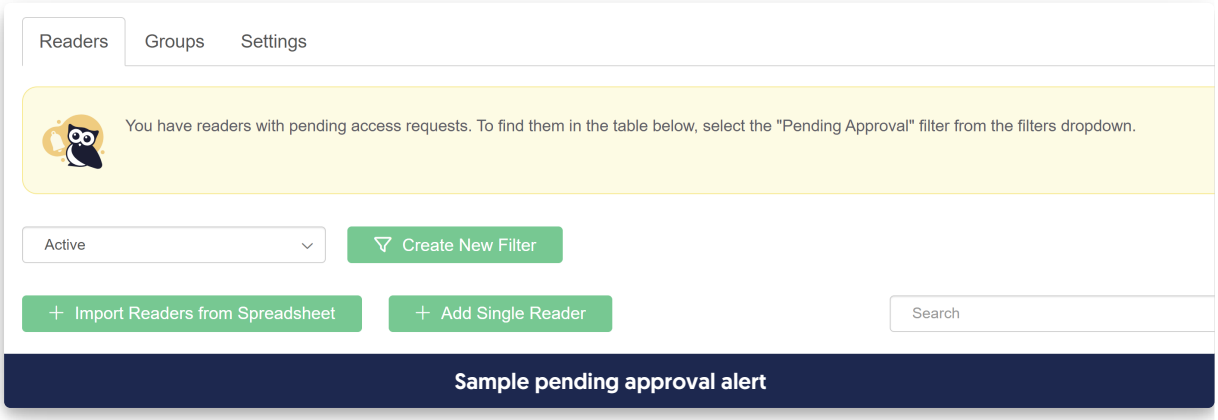
When a new reader signs up and you require approval, they will see a message like this:



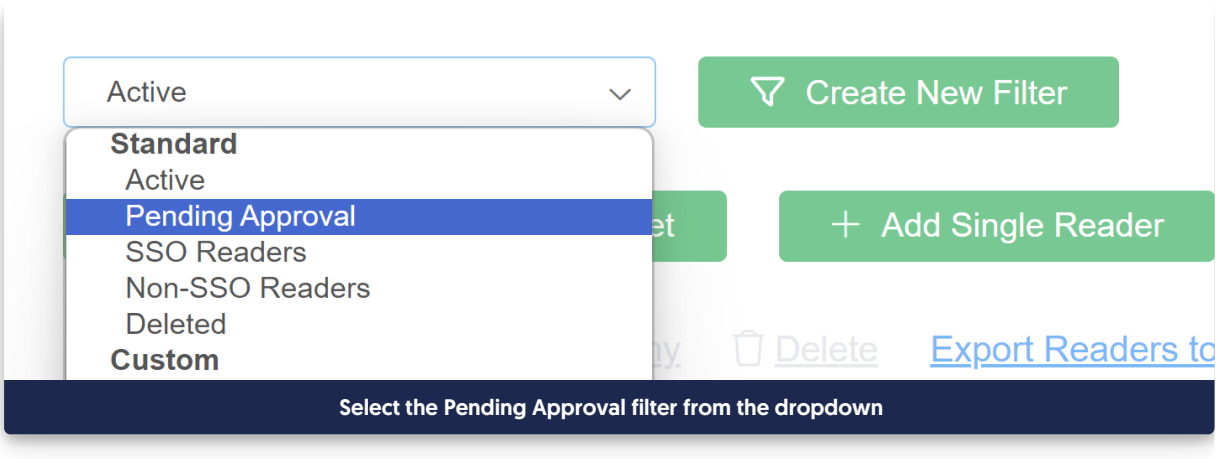
They will be added to your Readers list as pending approval.

You can approve or deny multiple readers at once. To do so:

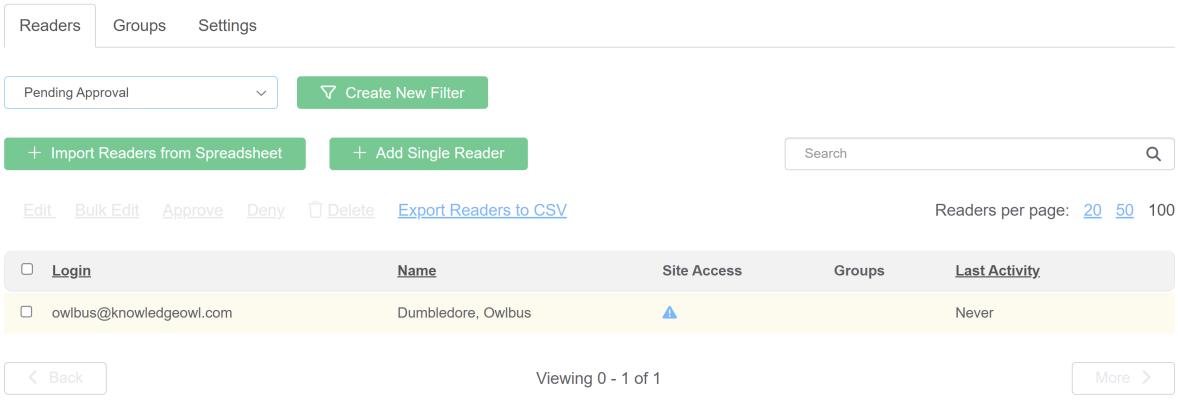
1. **Click on your profile icon/name in the upper right.**
2. **Select Readers from the dropdown to access the Readers area of your account.**
3. **You will see an alert on top of the Readers list if you have new readers awaiting approval:**



4. **Click the filter dropdown to select the Pending Approval filter:**



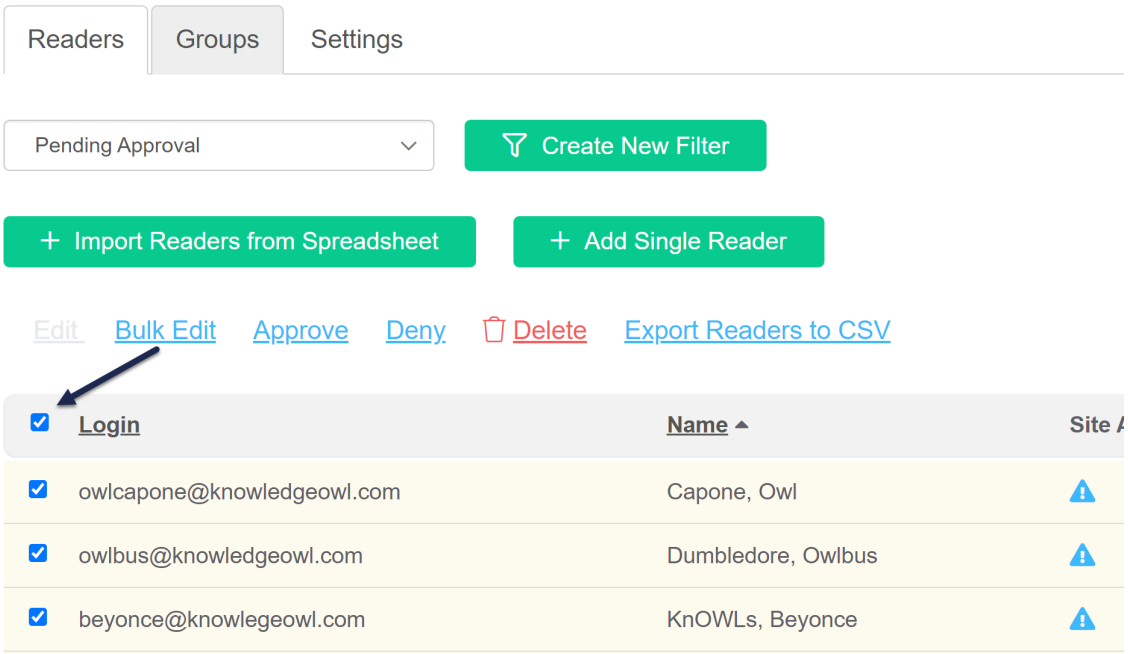
5. **This will display a list of all readers pending approval:**



6. **Check the boxes next to the readers you'd like to approve or deny.**

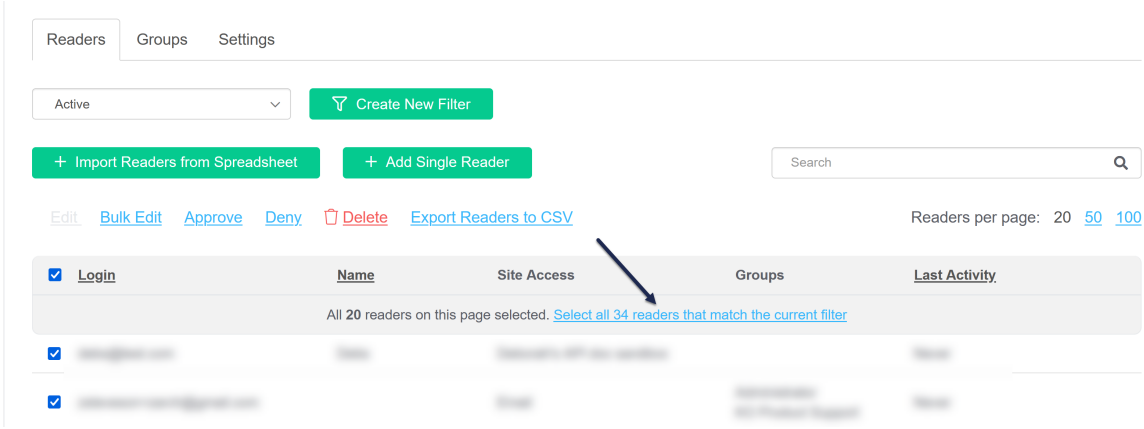
   a. **You can use search here to refine the list, or create a custom reader filter to get at segments of the pending approval readers.**

   b. **You can also select all readers on the page by using the checkbox in the upper left corner.**

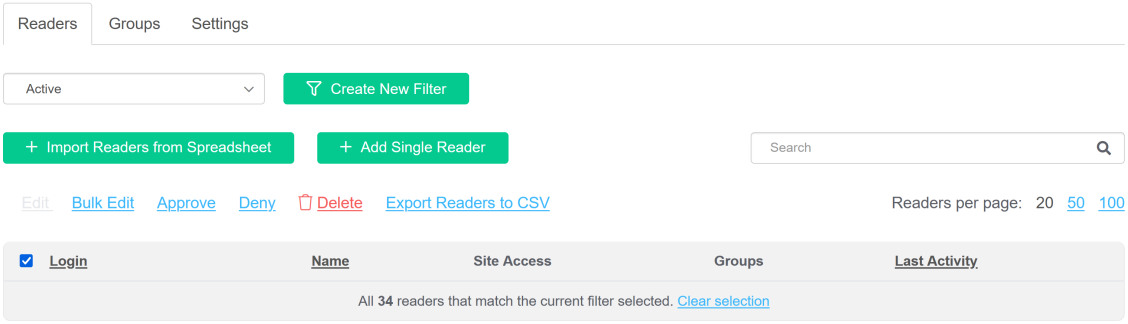


   c. **Once you've selected all readers on the page, if there are multiple pages, you can click the link that**

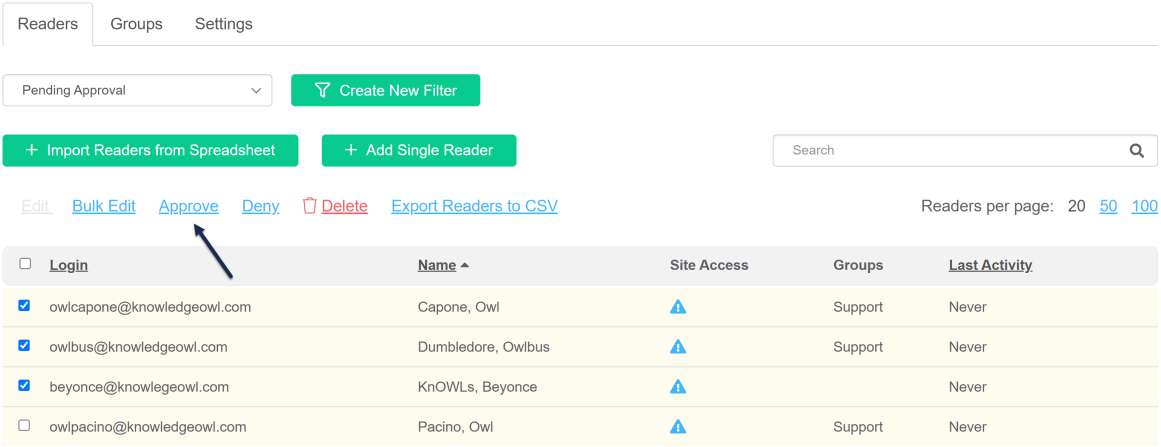
appears at the top of the reader list to select all readers in the filter/view.



d. Not sure what you've selected? If you select all readers that match the current filter, the text will change and you'll have the option to **Clear selection**.



7. With your readers selected, click on the **Approve** or **Deny** link near the Bulk Edit option to approve or deny these readers.



8. When you **Approve** readers:
   - The knowledge base they requested access to will be listed in the Site Access column.
   - They'll be marked with an Active status and appear in the Active filter.
   - They'll receive a reader welcome email.
9. When you **Deny** readers:
   - The knowledge base they requested access to will not be listed in the Site Access column.

- They'll be marked with an Active status and appear in the Active filter.
- They will receive no email notification of the denial.
- If the readers have no additional site access, we recommend also Deleting the readers.

10. If you'd like to assign these readers to reader groups or make other changes to their access, we recommend using a bulk reader edit to update them.

Auto-assign new readers to groups upon signup

Last Modified on 05/29/2024 5:27 pm EDT

If you have reader sign-ups enabled, by default, new reader signups aren't assigned any reader groups. You can create rules to automatically assign readers to groups based on their email domain.

A common use case is to assign all readers with internal email addresses to an internal reader group. For example, Linus likes having a rule that will assign all readers with a `knowledgeowl.com` email address to the **Support** reader group, which gives them access to all content restricted to our Support group.

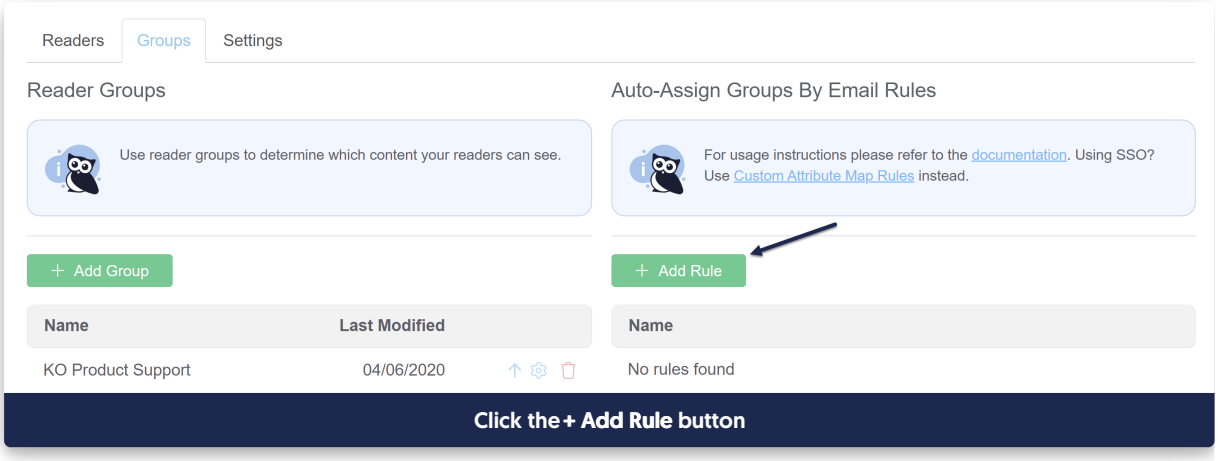
If you're using reader signup, this can help guarantee that new readers get access to the content they need without a KnowledgeOwl admin having to manually review and assign them to the appropriate groups.

These rules currently apply to readers who have signed up for access to your knowledge base **only**. They do not apply to:

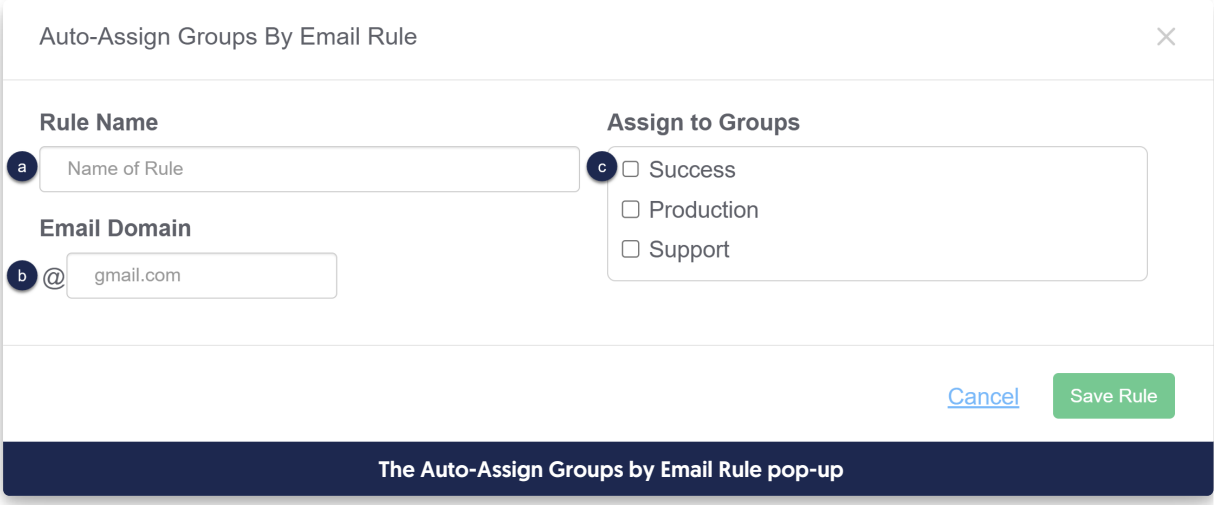
- Reader accounts that you or another KO admin manually creates in your **profile icon/name > Readers** (singly or in bulk)
- Readers who come through remote authentication or any of our SSO integrations. If you are using SSO, see Auto-Assign Groups By Email Rules (SSO Edition) for SSO-specific steps!

To set up Email Rules:

1. Click on your **profile icon/name** in the upper right.
2. Select **Readers** from the dropdown to access the Readers area of your account.
3. Open the **Groups** tab.
4. Select the **+ Add Rule** button.



5. **This will open the Auto-Assign Groups By Email Rule pop-up. To set up your rule, include:**



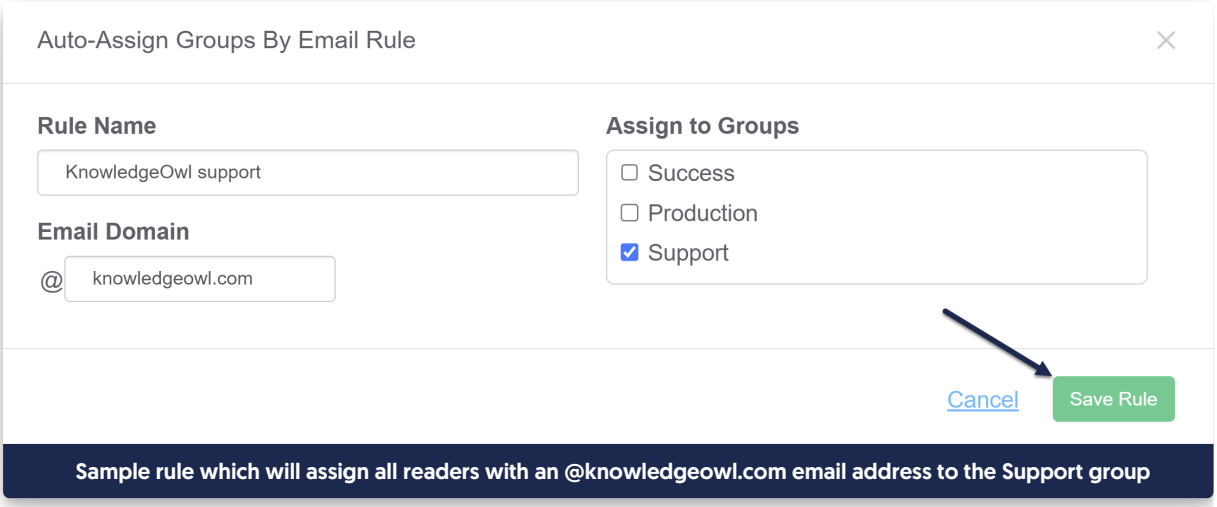
The Auto-Assign Groups by Email Rule pop-up

   a. **A Rule Name. This name will appear in the Auto-Assign Groups by Email Rules in Readers > Groups, so it should help describe the rule.**

   b. **The Email Domain the rule applies to: all readers with this email domain will have this rule applied. It must be an entire domain (such as @knowledgeowl.com, @gmail.com, @yourcompany.com, etc.).**

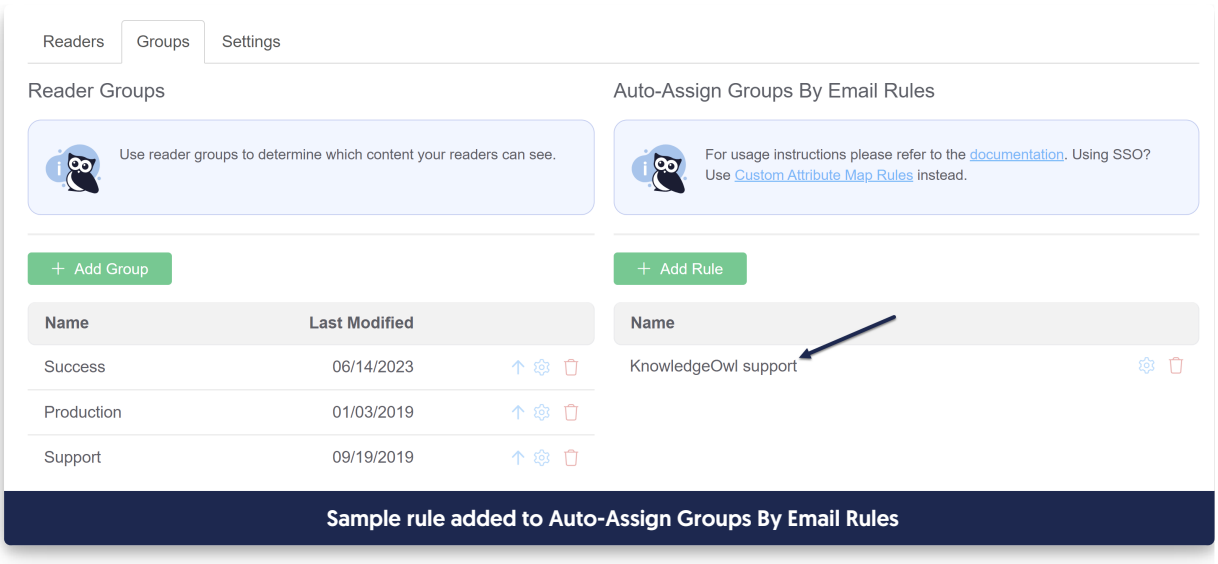
   c. **Use the Assign to Groups checkboxes to select the Reader Group(s) that people with that email domain should be assigned to. This list depends on the Reader Groups you've set up in your knowledge base.**

6. **Click Save Rule to save your changes. Here, we create a rule that will assign all readers with an @knowledgeowl.com email address to the Support group:**



Sample rule which will assign all readers with an @knowledgeowl.com email address to the Support group

7. **Your rule will now appear in the Auto-Assign Groups by Email Rules section of Readers > Groups and will be applied to all reader signups from here on out. You can edit it (gear icon) or delete it (trashcan icon) using the icons to the right of the rule.**



By default, rules will only be applied when a new reader first signs up.

To run the rules on subsequent logins and allow rules to affect existing readers, choose "Override reader groups based on rule logic on each login" under Readers > Settings. (Note that changing this setting, though, will override any manually-assigned reader groups for readers in the rule domains, though. We don't recommend using this setting if you're using auto-assigned rules in conjunction with manually-assigned groups!)

Single sign-on (SSO) overview

Last Modified on 05/29/2024 5:28 pm EDT

KnowledgeOwl supports multiple flavors of single sign-on (SSO) depending on your needs. SSO is available on all plan levels.

- SAML SSO
  Use an existing SAML identity provider (IdP) such as ADFS, G Suite, Azure AD, or Okta to authenticate and log in your readers. This is the most secure method of authentication and popular for internal knowledge bases.
- Remote authentication
  Host an authentication script in a third party to authenticate and log in your readers. This is the most popular way for software companies to authenticate their customers through their own website or application.
- Salesforce SSO
  Restrict access to only your Salesforce users. Mainly used when creating an internal knowledge base for your Salesforce agents.

Here's a quick overview of what's available with each:

Feature	SAML SSO	Remote authentication	Salesforce SSO
SSO readers	Yes	Yes	Yes
SSO authors	Yes	No	No
Can also have public (non-logged in) content	Yes	Yes	No
Can be used in conjunction with other authentication methods (SSO, remote auth, reader logins)	Yes	Yes	No
Can pass over reader groups for access to restricted content	Yes	Yes	Yes

SSO options for different knowledge base setups

Last Modified on 07/10/2024 4:30 pm EDT

Prerequisite
In order to test SAML SSO in KnowledgeOwl, you must first configure your SSO integration.
View our list of available setup instructions.

Type	Set up	Testing

Type	Set up	Testing
Restrict entire knowledge base to SSO	Under **Settings > Security** choose: 1. **Default Access:** Public 2. **Default Login Page:** SAML Login URL Under **Settings > SSO, SAML Settings** choose: 1. **Enable SAML SSO** 2. **Restrict Access to SSO**	Inside the application: 1. Click View KB. 2. Click either Logout button. You should be redirected to the IdP for authentication. 3. After authenticating, go to **Your Account > Readers** to ensure the reader was properly created with all the mapped attributes. Notes: • You can also test by going to your knowledge base URL in a browser where you are not logged in as an author. • If you authenticate through your IdP with the same email as your KO author, you will be authenticated as the author and not a reader. You can tell you are logged in as an author if you see the dark editor bar at the bottom of the knowledge base to Add Content, Edit in App, and Change Reader Groups.

Type	Set up	Testing
Restrict only some content to SSO (part public and part private)	Under **Settings > Security** choose: 1. **Default Access:** Public 2. **Default Login Page:** SAML Login URL. Under **Settings > SSO, SAML SSO Settings** choose: 1. **Enable SAML SSO** (do NOT choose Restrict Access to SSO) Under **Settings > Basic** choose: 1. **Add a reader login / logout link** Under **Settings > Style:** 1. Go to **Custom HTML > Top Navigation**. 2. Make sure you have the login template code if you want a login button. It will look like this: [template["login"]]	Inside the application: 1. Click View KB. 2. Click the Logout button in the top right. This should log you out as an author and return you to the homepage of the public site with the option to Login. 3. Click Login to authenticate with your IdP. 4. Go to **Your Account > Readers** to ensure the reader was properly created with all the mapped attributes. Notes: • You can also test by going to your knowledge base URL in a browser where you are not logged in as an author and clicking on Login. • If you click on the author Logout in the bottom right, it will bring you to the reader login page. Click Continue as Guest to return to the public homepage. You cannot log in here with your IdP credentials. Your KO author credentials will work. • If you authenticate through your IdP with the same email as your KO author, you will be authenticated as the author and not a reader. You can tell you are logged in as an author if you see the dark editor bar at the bottom of the knowledge base to Add Content, Edit in App, and Change Reader Groups.

Type	Set up	Testing
Restrict entire knowledge base but allow both SSO and reader logins	Under **Settings > Security** choose: 1. **Default Access:** Restrict by reader logins 2. **Default Login Page:** Choose SAML Login URL or Reader Login Page Note: The default login page is where readers will go if they try to access the site without being logged in or click on the logout button in the kb. Under **Settings > SSO, SAML Settings** choose: 1. **Enable SAML** 2. Do not Restrict Access to SSO	Inside the application, for SSO: 1. Click View KB. 2. Click the Logout button in the bottom right (the author logout button). This will bring you to whatever you've set as the Default Login Page. 3. Test logging in through that page. (For SAML account creation testing, go to **Your Account > Readers** to ensure the reader was properly created with all the mapped attributes.) 4. To test the non-default login page option, you'll need to enter the login page manually (/readerlogin for the KnowledgeOwl built-in login page, the IdP Login URL from **Settings > SSO** for SSO).

SSO FAQs

Last Modified on 05/29/2024 5:28 pm EDT

What identity providers do you support?

KnowledgeOwl supports identity providers using SAML 2.0. Here's a list of popular IdPs currently being used by our customers:

- ADFS
- Azure AD
- G Suite (formerly Google Apps)
- Okta
- Shibboleth

Can I set up multiple SSO integrations?

No. We only support one IdP per knowledge base.

Alternatively, you can:

- Use SSO with other authentication methods, such as KnowledgeOwl reader logins or remote authentication
- Create a new knowledge base that is synced to your current knowledge base, and add a different SSO integration there

Can I use SSO with other authentication methods?

Yes! SSO can be used in combination with other authentication methods. Here's some sample setups:

- Public knowledge with SSO login for access to restricted content
- Private knowledge base with SSO for staff and remote authentication for customers
- Private knowledge base with SSO for IdP users and manual reader logins for other readers

Can I pass over groups to set permissions?

Absolutely! You can set up reader groups in KnowledgeOwl and automatically assign your readers to the appropriate groups via SSO. Use reader groups to control who has access to what content.

To get this started, you'll need to manually create reader groups in KnowledgeOwl that match the group names that will be passed over from SSO. You'll also need to be sure you've set up Direct Reader Attribute Map rules and/or Custom Attribute Map rules to send that reader group information from your SSO to KO. Our SAML SSO and remote authentication setups support this. Readers will be automatically assigned to the KO groups based on the group info passed over from SSO.

Can I create groups in KnowledgeOwl that don't exist in my IdP?

Yes! You can create KO-only reader groups that will not be affected by SSO. The default behavior is that groups are set/unset by SSO, but a KO-only reader group is not affected. You will need to manually assign readers to these groups in KO.

Do I need to create all my readers in KnowledgeOwl?

Nope! SSO will automatically create new readers for you the first time they log in. You do not need to manage your readers in KO when using SSO.

Can I log in readers from my own application?

Yes! As long as you have access to the code, you can host your own remote authentication script to automatically authenticate and log in your readers.

Do my SSO reader logins have to be email addresses?

No. While regular KnowledgeOwl reader logins/usernames must be formatted as email addresses, readers coming from SSO do not have to use email address formats.

Can I talk to someone?

Sure! You can contact us via email or schedule a phone call. If you need advanced technical assistance, we can connect you with a developer on our end.

How does SSO work with author permissions?

By default, all KnowledgeOwl authors are created with a KnowledgeOwl-based username and password. If SAML/SSO is enabled, authors can log in using:

- Their KO-based username and password, using https://app.knowledgeowl.com/login
- Their SAML username and password, using their SAML login URL

You can force authors to log in only via SAML by changing their Author login type.

You cannot *provision* authors to app.knowledgeowl.com using SSO. You need to create the author in KnowledgeOwl first and then set them to log in via SSO.

Update your x509 certificate

Last Modified on 05/29/2024 5:28 pm EDT

In July 2022, we rolled out a more secure version of our x509 certificate for SAML SSO.

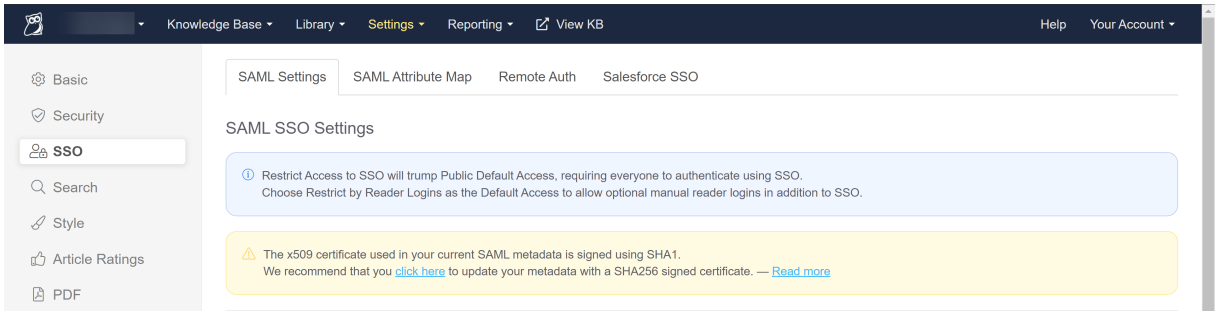
All SAML SSO integrations set up after this time automatically use the newer, more secure certificate.

For SAML SSO integrations enabled before 19 July 2022, you'll need to manually update to the new x509 certificate. See instructions below. This is especially important if you're using Azure AD.

Is my knowledge base affected?

To see if your knowledge base is affected by this change:

1. Go to **Settings** > **SSO**.
2. Be sure you're in the **SAML Settings** tab.
3. If you see a warning message near the top of the screen that says "The x509 certificate used in your current SAML metadata is signed using SHA1. We recommend that you click here to update your metadata with a SHA256 signed certificate", your knowledge base is using the older x509 certificate and needs to be updated. It should look something like this:



Update the certificate

The overall process for updating the certificate is:

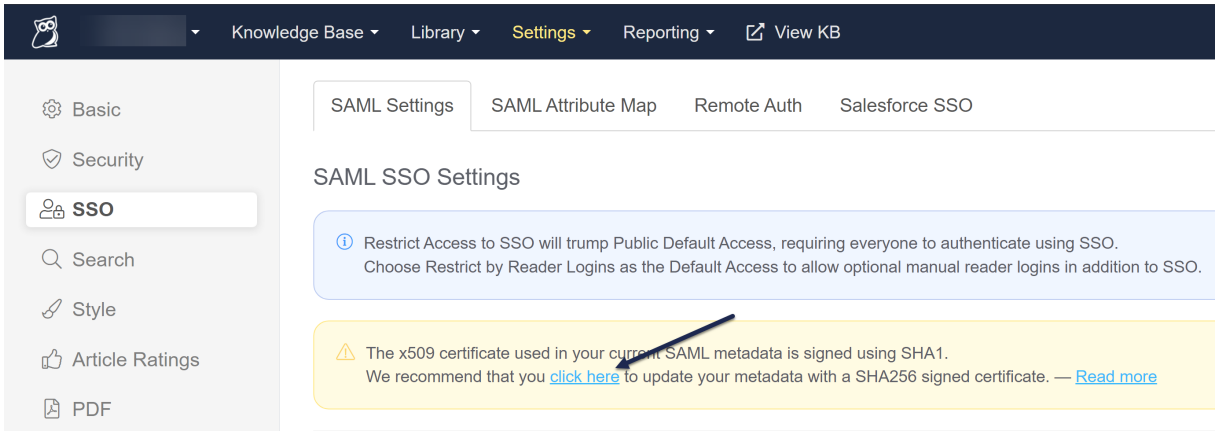
- In KnowledgeOwl, generate a new x509 certificate. Once generated, your existing SAML SSO integration will be broken.
- Copy the new KnowledgeOwl SP Metadata from KnowledgeOwl, paste it into a text editor, and save it in the format your IdP prefers for the certificate. (Common types include .crt, .cert, and .xml.)
- Update the x509 certificate with your IdP using that file.

Once you generate a new x509 certificate, your existing SSO integration **WILL NOT WORK**. We recommend checking your IdP's process and file format for updating the SP x509 certificate

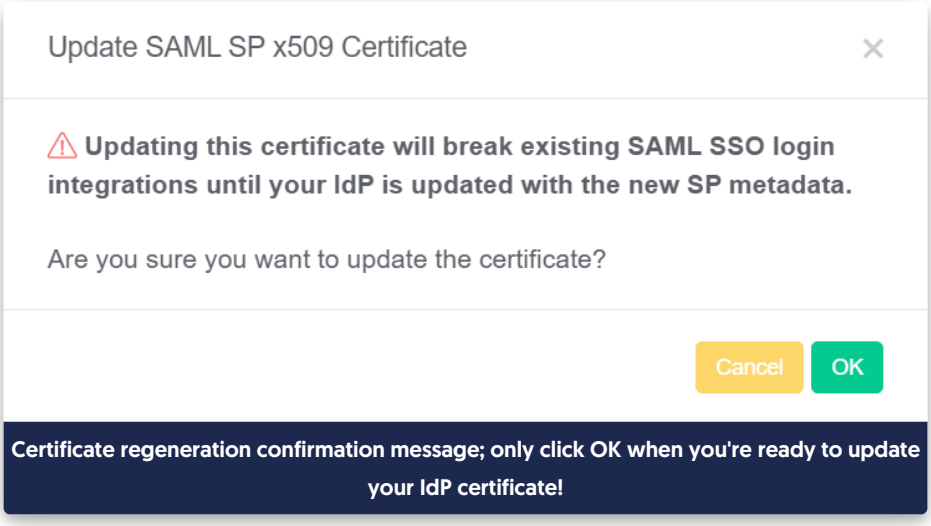
before you begin this process, so you can update it as quickly as possible once you begin.

To begin updating the certificate, in KnowledgeOwl:

1. **Go to Settings > SSO.**
2. **Be sure you're in the SAML SSO Settings tab.**
3. **In the warning message that appears near the top, click the click here link to begin generating the new x509 certificate:**

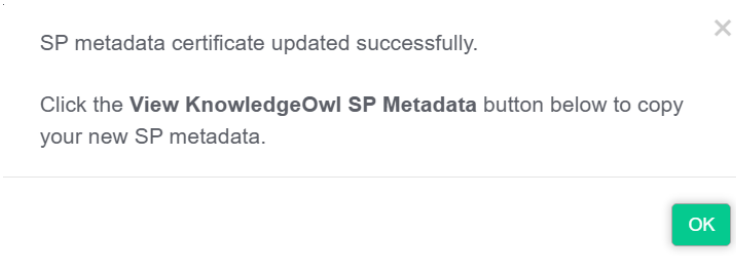


4. **This will open a pop-up asking if you are sure you want to proceed. Once you click OK in this pop-up, your existing SAML SSO login integrations will be broken until you finish updating the x509 certificate with your IdP.**

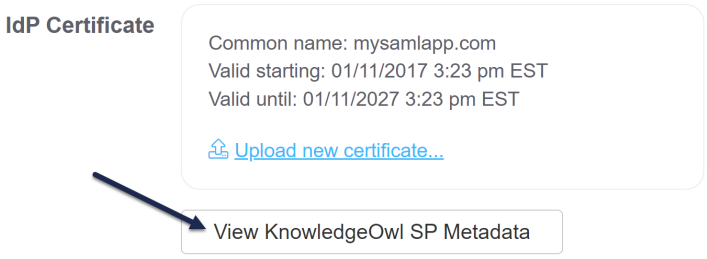


Certificate regeneration confirmation message; only click OK when you're ready to update your IdP certificate!

5. **When you're ready, click OK to update the certificate.**
6. **You'll get a confirmation message that the certificate has been updated:**



7. **You can now click the View KnowledgeOwl SP Metadata button in the IdP Certificate section to copy the updated certificate's XML:**



8. **From here, you'll need to update the x509 certificate with your IdP. These steps vary by provider:**
    - **For Active Directory Federation Services, see Configure SSO using Active Directory Federation Services (AD FS), Step 4: Add the KnowledgeOwl SP info to your IdP, steps 1-10.**
    - **For Azure Active Directory, see Configure SSO using Azure Active Directory (Azure AD).**
    - **For G Suite, see Configure SSO using G Suite (formerly Google Apps).**
    - **For all other SSO providers, see Configure SAML SSO (generic instructions) and your provider's documentation.**

Opening links to SSO knowledge bases from Microsoft Office

Last Modified on 05/29/2024 5:28 pm EDT

Some customers who require SSO login for their knowledge bases have run into some odd behaviors when they include links to their knowledge base articles within Microsoft Office files, including:

- Word
- Excel
- Powerpoint
- Visio

When links to KO articles behind SSO are included in MS Office files like these, some customers report that clicking on the links doesn't take them to the article that's linked. Instead, they might be navigated to:

- Their knowledge base homepage
- Their SSO login page--logging in just sends them to the homepage

In both cases, the specific article in the hyperlink isn't opened.

The exact same links will work properly when clicked in PDFs and Microsoft Outlook.

If you've run into this issue, it is *not* a KnowledgeOwl issue. It is a question of Microsoft Office not playing nicely with your Single Sign-On solution. You'll need to talk to your IT department to get it resolved. We've written this page so you can send the entire link to your IT department to provide background on the situation. There is no one-size-fits-all solution (even Microsoft doesn't officially offer one), but there are a variety of solutions that may work.

What causes this issue?

Short answer: Microsoft Office, by design, does some pre-fetching of links to try to prevent errors when clicking links. In most cases, this happens faultlessly behind the scenes, but when SSO is involved, it can strip out URL parameters or redirects, which can shorten the URL that's actually requested from Office to KnowledgeOwl to get stripped down to a login or homepage screen. You don't see this behavior in Outlook because Outlook, unlike the rest of the Office suite, doesn't do that pre-fetching; it just tries to open the URL you clicked on.

Longer answer: Microsoft discusses the issue here: https://docs.microsoft.com/en-us/office/troubleshoot/office/click-hyperlink-to-sso-website

However, if you don't speak Microsoft-technicalspeak well, Wimpy Programmer's explanation of the behavior is easier to understand. Here are the most relevant sections directly quoted:

> ### Microsoft Office and Link Pre-fetching
>
> Now we'll look at Microsoft Office and its peculiar handling of links. When you click a hyperlink in an Office file (Word document, Excel spreadsheet, PowerPoint presentation, etc.), the URL is not immediately passed

> to your browser. First, Office will internally fetch the address. If the link returns a 3xx Redirection code, Office will request the new address and repeat. If the link returns a 4xx Client Error code, Office will abort the request and tell the user that the link is unavailable, having never opened a browser (I'm guessing that's the whole point of this "feature"). And if the link returns a 2xx Success code, the URL is finally opened in a browser. Only the final URL is passed to the browser; any redirects are masked by Office.
>
> ### Microsoft Office and SSO
>
> Microsoft Office conflicts with Shibboleth (and other SSO systems, I expect) because of cookies. When Office requests the protected resource, the SP redirects to the IdP login page. Office follows the redirect and the IdP login page returns a 200 response, waiting for the user's credentials. Office opens the IdP login page address in the user's browser, **but the cookies describing the request are lost**. After the user authenticates, the IdP doesn't know how to return the user to their SP and displays an error. Thus hyperlinks in Office files never load.

Solution

There is no single, agreed-upon solution to this issue. Your IT department will need to decide how they'd like to handle it, based on the SSO setup, their security protocols, and so on. Common solutions include:

- Windows registry key changes
- Server-side solutions (Wimpy Programmer offers a Shibboleth server-side example here: https://www.wimpyprogrammer.com/microsoft-office-link-pre-fetching-and-single-sign-on#a-server-side-solution)

We are not explicitly recommending or advocating for a specific solution from the above options--what is "right" varies based on your SSO, security setup, and so on. Your IT department is best positioned to decide on the right solution for you and to implement it. Hopefully these resources help them begin that process, though!

SAML SSO setup overview

Last Modified on 05/29/2024 5:28 pm EDT

While specific individual steps vary based on your flavor of SAML Single Sign-On (SSO), at a high level, the overall process includes these steps:

- Add the KnowledgeOwl SP info to your SAML SSO provider. (SP entity ID, SP Login URL, and SP Logout URL, **Settings > SSO**.)
- Add your IdP info to KnowledgeOwl (IdP entity ID, IdP Login URL, and IdP Logout URL, **Settings > SSO**.)
- Upload the IdP certificate from your SAML SSO provider to KnowledgeOwl, **Settings > SSO**.
- Check the Enable SAML SSO box in KnowledgeOwl in **Settings > SSO**.
- Add the KnowledgeOwl x509 certificate (in View KnowledgeOwl SP Metadata in **Settings > SSO**) to your IdP.
- Map SAML Attributes to fields in KnowledgeOwl to properly create reader accounts (SSO ID is required--you'll see an error if you skip this step. See Missing SSO ID mapping warning for more details)
  - For existing attributes that directly map to KnowledgeOwl fields, use Direct Reader Attribute Mappings.
  - To transform attribute values coming from your SSO provider (such as setting all readers to automatically be a member of one group in KnowledgeOwl), use Custom Attribute Map Rules.
- To help with troubleshooting or to see the attribute values being passed, you can check the **Enable debug mode** option in **Settings > SSO**. Then try logging in with an account through your SAML SSO provider--instead of logging in to the knowledge base, it will display the information that's being passed over from SSO to KnowledgeOwl, so you can ensure a) Info is being passed over, and b) That you have chosen the correct attributes for your mappings.
- *Optional:* If you're using SAML SSO as your only or primary reader authentication mechanism, set the **Default Login Page** in **Settings > Security** to SAML Login URL.
- *Optional:* To make it so that SAML SSO is the **only** access method for your knowledge base, check the **Restrict Access to SSO** box in **Settings > SSO**.

For more detailed, step-by-step instructions, see:

- Configure SAML SSO (generic instructions)
- Configure SSO using Active Directory Federation Services (ADFS)
- Configure SSO using Azure Active Directory (Azure AD)
- Configure SSO using G Suite (formerly Google Apps)
- Configure SSO using Salesforce (this uses very different steps)

Configure SAML SSO (generic instructions)

Last Modified on 05/29/2024 5:28 pm EDT

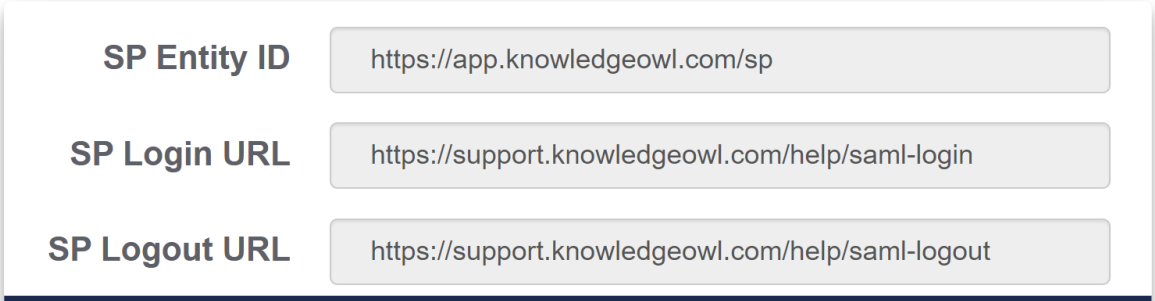
Below are instructions for setting up SAML SSO using a generic identity provider. We have specific instructions for our most popular identity providers:

- ADFS
- G Suite (Google Apps)
- Azure AD

Step 1: Add the KnowledgeOwl SP info to your IdP

Generally speaking, when adding an SP to your IdP, there are four pieces of information that you need about the SP.

1. SP Entity ID
2. SP Login URL — sometimes referred to as a "sign on URL"
3. SP Logout URL — some systems do not ask for this
   All three of these fields can be found in your knowledge base in **Settings > SSO** in the **SAML Settings** tab:



Sample SP entity ID and login/logout URLs

4. Name ID Format — some systems do not ask for this. If yours needs it, you should set it to "**Unspecified**" or, if you need the long version: "**urn:oasis:names:tc:SAML:1.1:nameid-format:unspecified**"

Step 2: Add your IdP info to KnowledgeOwl

Once you have entered those pieces of information into your IdP, the IdP should provide you with the same three pieces of information as above, but for the IdP side of the connection:

1. IdP Entity ID
2. IdP Login URL — sometimes referred to as a "sign on URL"
3. IdP Logout URL — if the IdP does not provide this, use the login URL

Add this information into the appropriate fields in KnowledgeOwl, located just under the SP fields in **Settings > SSO** in the **SAML Settings** tab:



Be sure to **Save** your changes if you aren't ready to upload your certificate yet.

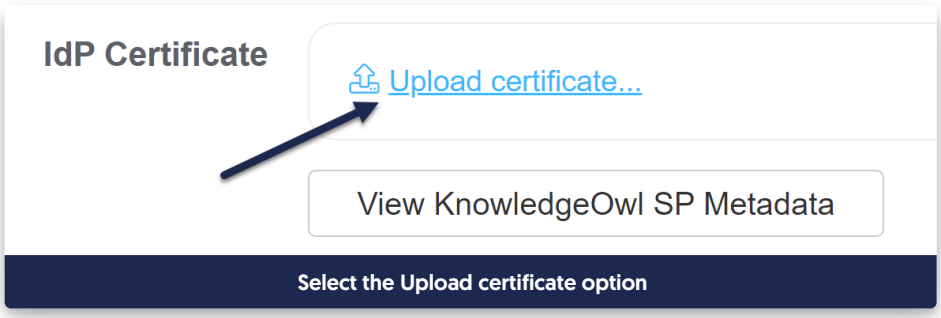
Step 3: Upload the IdP certificate to KnowledgeOwl

The IdP should also provide a public certificate. You will need to download the certificate and then upload it into KnowledgeOwl.

KnowledgeOwl expects a file formatted as .crt. If you are using Okta or another provider which saves the certificate as a .cert file, you'll need to resave it as .crt.

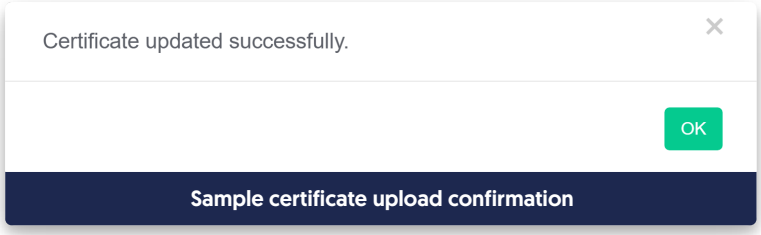
Once you have your certificate in .crt format:

1. Go to **Settings > SSO**.
2. Be sure you're in the **SAML Settings** tab.
3. Select the **Upload certificate** option in the **IdP Certificate** section, which is located just under the IdP URL fields:



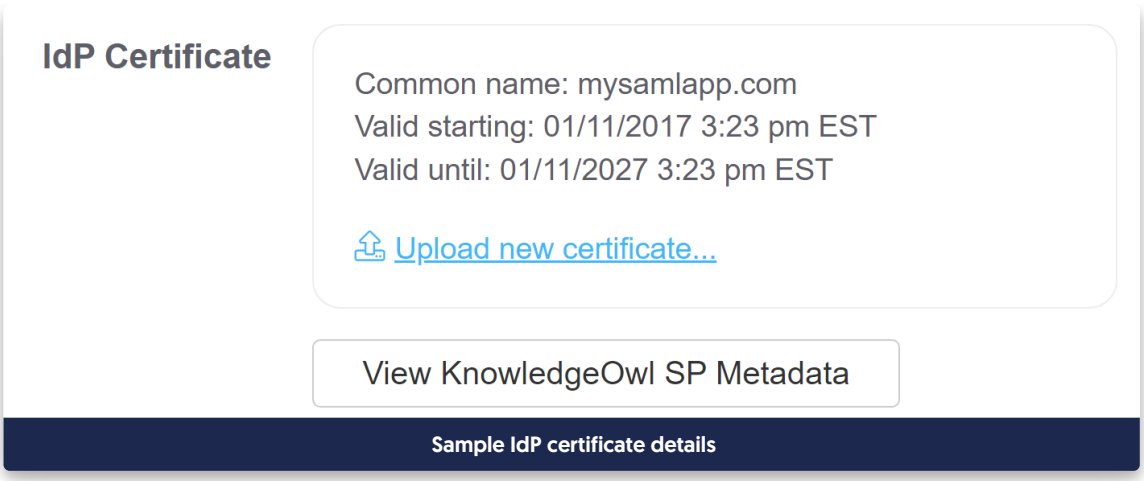
Select the Upload certificate option

4. The link will open a file browsing window where you can select the .crt file to upload. Once you upload, a pop-up will appear to confirm if the certificate was updated successfully:



Sample certificate upload confirmation

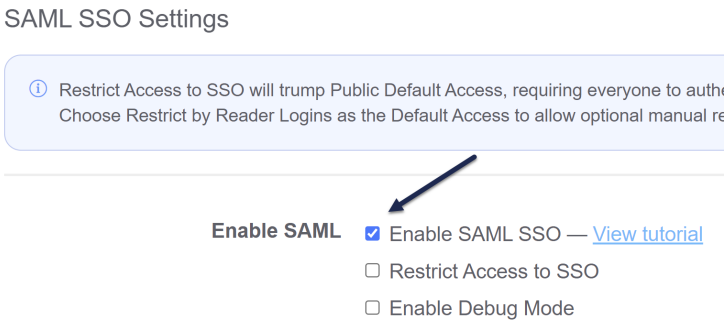
5. Once you select OK to close that pop-up, the **IdP Certificate** section should update to display the certificate's details. For example:



Sample IdP certificate details

Step 4: Enable SAML SSO

Once you have entered the three IdP fields and have uploaded the IdP certificate into KnowledgeOwl, make sure that the Enable SAML SSO checkbox is checked, and Save the SSO Settings page.



Step 5: Add the KnowledgeOwl x509 certificate to your IdP

If your IdP requires it, you can access the x509 certificate in KnowledgeOwl:

1. **Go to Settings > SSO.**
2. **In the SAML Settings tab, select the View KnowledgeOwl SP Metadata button. If you aren't seeing any metadata, ensure that you've checked the box to "Enable SAML SSO" and saved. The metadata is only generated after this option is saved.**
3. **This will open a pop-up with your x509 certificate information in it.**
4. **Click anywhere in the Service Provider Metadata for Knowledge Base pop-up to highlight the full XML contents and copy it.**
5. **Then copy the text and paste where necessary (you may need to put in a text editor to save this as a .crt file, an .xml file, or some other format--check your IdP's requirements).**

Step 6: Map SAML attributes to fields in KnowledgeOwl

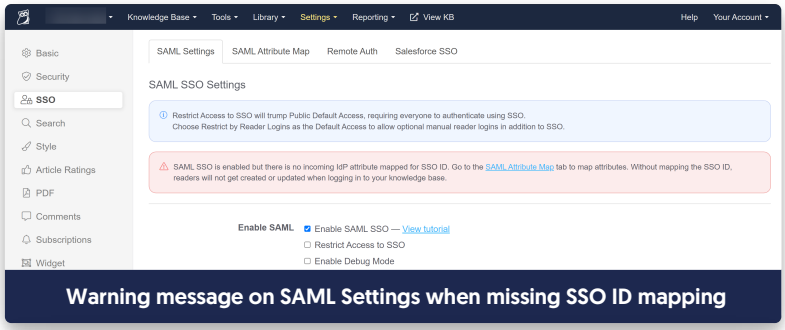
Now that the IdP URLs have been added to your knowledge base settings and vice versa with the SP URLs into your IdP, you will need to configure your IdP to pass over identifying information about the readers logging in

so that we can create / update them within your KnowledgeOwl account.

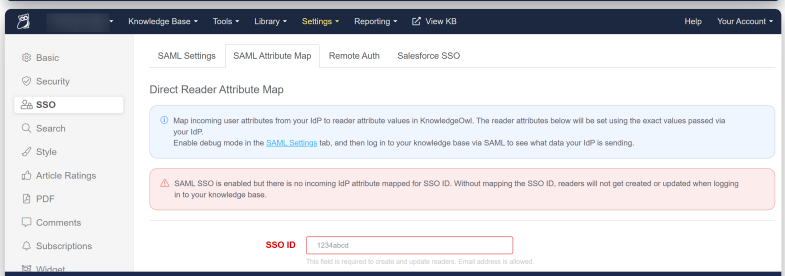
These mappings are configured in **Settings > SSO** in the **SAML Attribute Map** tab.

> The minimum required information needed to successfully log a reader in through SAML SSO is a unique ID (SSO ID) and an email address. The reader's email address can be used as both the SSO ID and their email address if this is preferred.

If you don't have a mapping set up for the SSO ID, you'll see warnings in **Setting > SSO** in the **SAML Settings** tab and the **SAML Attribute Map** tab:



Warning message on SAML Settings when missing SSO ID mapping



Warning message on SAML Attribute Map when missing SSO ID mapping

In the IdP, there should be a mechanism to add outgoing attributes where you can choose a name and select the appropriate field from the IdP's database.

Add the reader's email and any other information you would like to the outgoing attributes. Choose names that make sense for these attributes, such as "email", "firstName", and so on.

1. In KnowledgeOwl, go to **Settings > SSO**.
2. Select the **SAML Attribute Map** tab.
3. Paste the names of the outgoing IdP attributes that correspond to the KnowledgeOwl reader attributes in the Direct Reader Attribute Map section.
    - If you cannot directly map an IdP attribute to a KnowledgeOwl reader attribute, you can use Custom Attribute Map Rules to do some mappings or logic for you. See the help page on those rules for more info.
4. Once you're done adding attribute mappings, **Save**.

If everything has been done correctly up to this point, you should be able to open a new incognito or private browser window and log into your knowledge base by accessing the **SP Login URL**.

Step 7: Optional settings

With your SAML SSO login working, you can now review two additional options:

- To make it so that SAML SSO is the only access method for your knowledge base, check the **Restrict Access to SSO** box in **Settings > SSO** and **Save**. This will override the Default Access selection in **Settings > Security**.
- If you'd like to use the SAML SSO as your only or primary reader authentication mechanism, set the **Default Login Page** in **Settings > Security** to SAML Login URL and **Save**.

See SSO options for different knowledge base setups for more information.

Troubleshooting

If you try to open the **SP Login URL** and the resulting page does not resolve, make sure that the **IdP Login URL** is correct, that it is using HTTPS, and that you can resolve the page by going to the IdP login URL directly.

If you are able to successfully log into your IdP but you get redirected to the "No Access" page with your knowledge base:

1. Go to **Settings > SSO**.
2. Check the box next to **Enable Debug Mode** near the top of the SAML Settings tab
3. **Save** those settings.
4. Now open the **SP Login URL** again.
    - If you see an error on the resulting debug page after logging in:
        - You may have an issue with the IdP certificate you uploaded, or
        - Your IdP may require one of the Advanced Options to be enabled in the **SAML Settings** tab.
    - If you don't see an error on the debug page after logging in:
        - Make sure that the IdP attribute names listed on the debug page match the values listed when you click on the **SAML Attribute Map** tab.
        - Make sure that the SSO ID and Username / Email fields have values entered in the **SAML Attribute Map** tab.
5. Once you're done troubleshooting, be sure to uncheck the **Enable Debug Mode** box and **Save** the SAML Settings.
6. If you're still having trouble after trying all of the above steps, contact our support team and we will try to help figure out what the issue is.

Configure SSO with Active Directory Federation Services (AD FS)

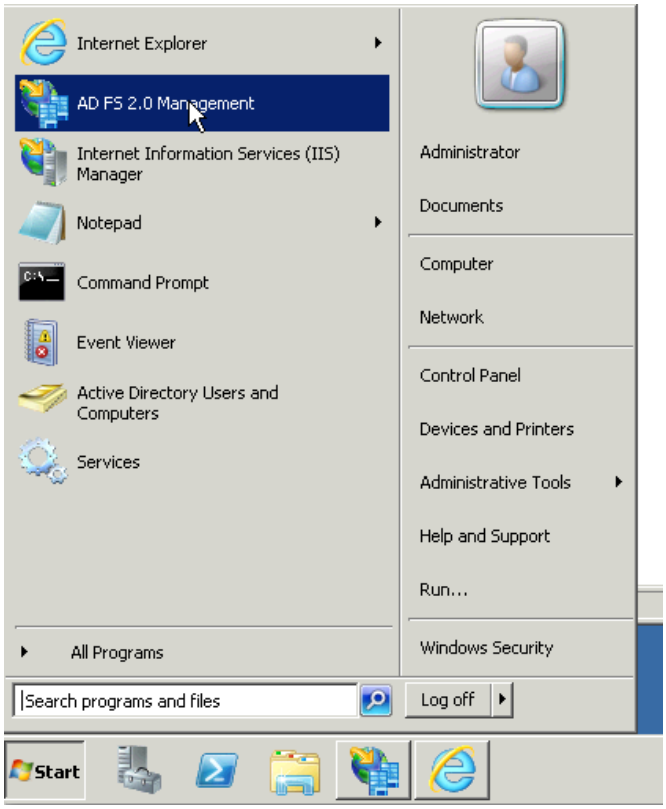
Last Modified on 05/29/2024 5:27 pm EDT

This tutorial will help walk you through setting up a an integration between AD FS and KnowledgeOwl using SAML 2.0.

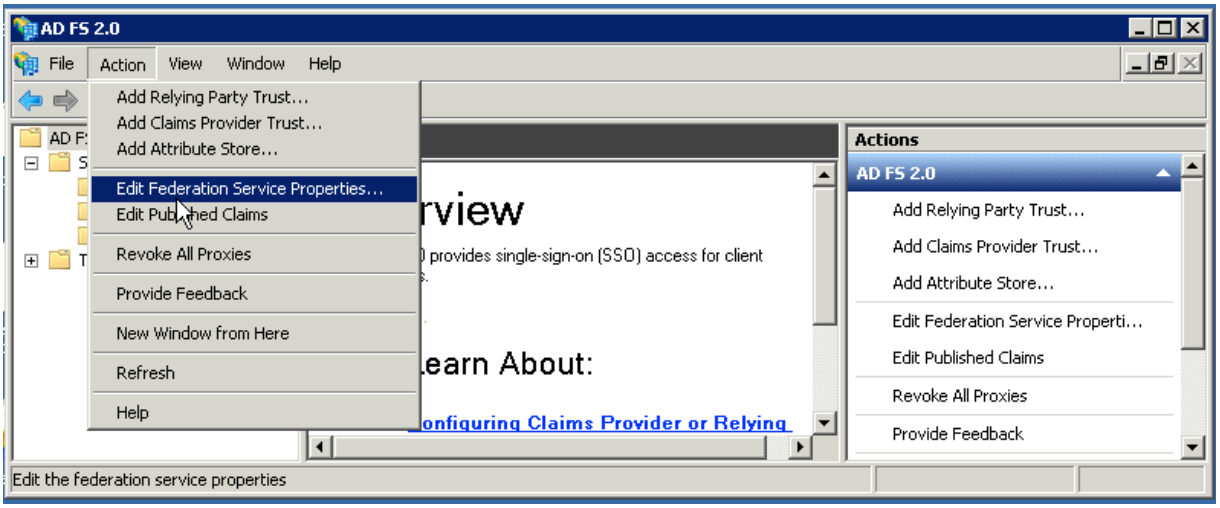
The screenshots below may not match your version of AD FS, but the steps to complete the integration should be the same.

Step 1: Add your IdP info to KnowledgeOwl

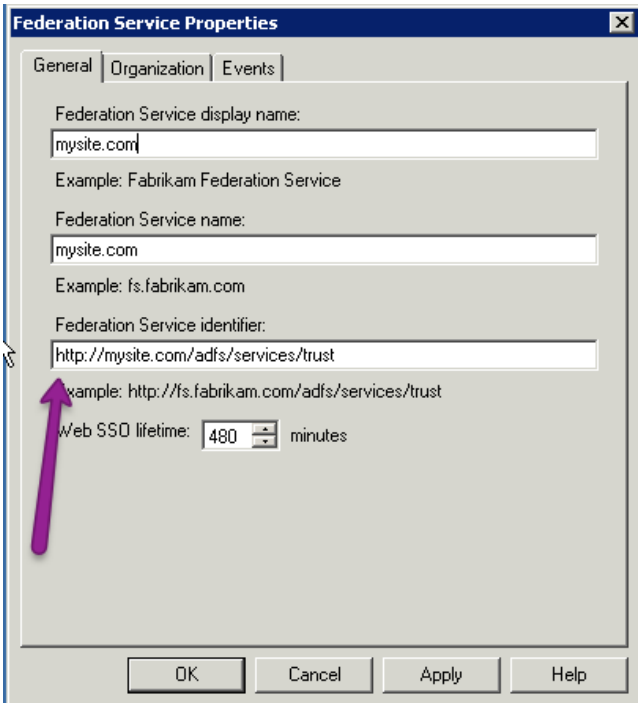
1. On your Windows server, find and open AD FS 2.0 Management (commonly found in the start menu under Administrative Tools).



2. Once you have opened AD FS Management, go to **Action > Edit Federation Service Properties.**



3. Copy the link that is displayed under **Federation Service identifier.**



4. In KnowledgeOwl, go to **Settings > SSO.**

5. Paste the link you copied in Step 3 into the field **iDP entityID.**

6. For most AD FS builds, the **Login URL** and the **Logout URL** will be the base URL of the iDP entityID with "/adfs/ls/" as the endpoint instead of "/adfs/services/trust":

IdP entityID	https://mysite.com/adfs/services/trust
IdP Login URL	https://mysite.com/adfs/ls
IdP Logout URL	https://mysite.com/adfs/ls

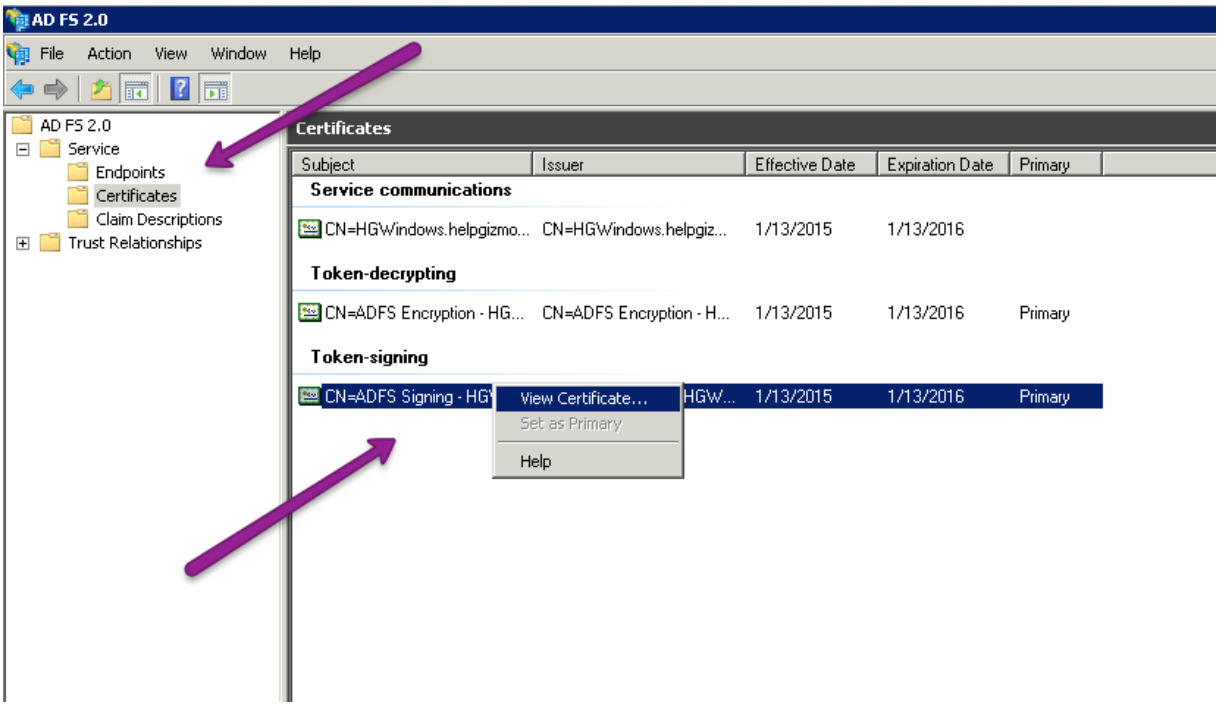
If this is not true for your setup, you will need to locate the URL that your ADFS setup uses for authentication.

7. Be sure to **Save** your changes in KnowledgeOwl if you're not immediately continuing to Step 2.

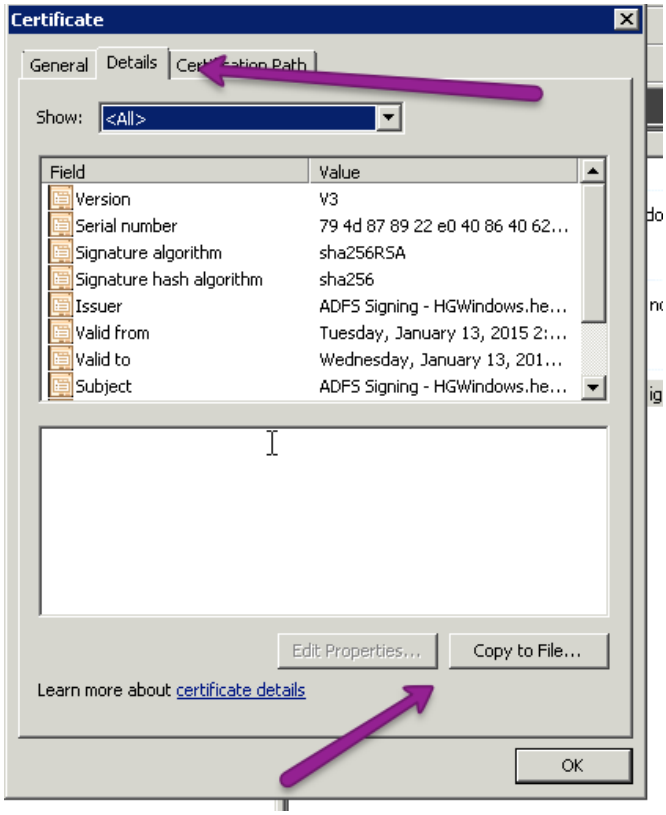
Step 2: Upload the IdP certificate to KnowledgeOwl

Next we will want to export our AD FS cert into a x509 DER format to upload into KnowledgeOwl. To do so:

1. In AD FS 2.0, go to **Service > Certificates.**
2. In the main pane, right-click on the certificate in the **Token-signing section.**
3. Click **View Certificate...** in the right-click menu.



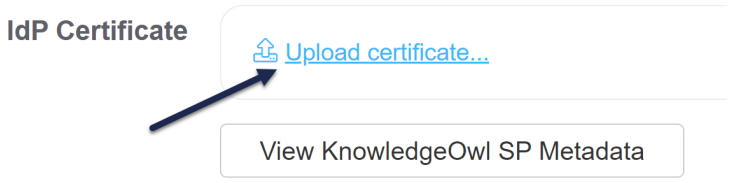
4. Open the **Details** tab.
5. Click on **Copy to File...**



6. This will bring up a **Certificate Export Wizard**. In the wizard, choose next until you get to the format page. On the format page make sure that **DER encoded binary X.509** is selected and choose next.

7. Choose a filename and a location that you will remember for the cert and then finish the wizard.

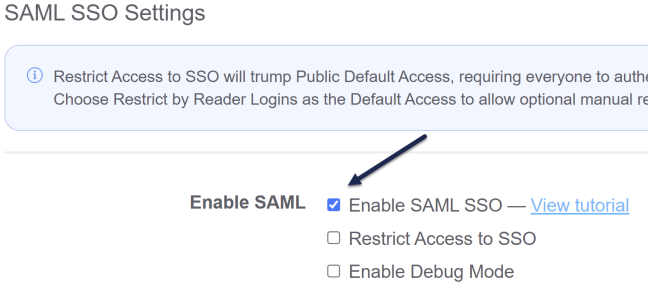
8. In KnowledgeOwl, upload the certificate file you created by clicking the **Upload certificate** link in the **IdP Certificate** section:



9. Once you have selected the correct certificate, be sure to **Save** your changes.

Step 3: Enable SAML SSO

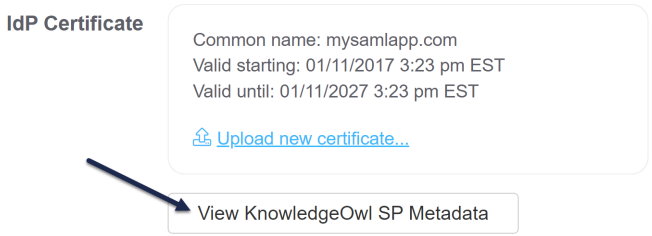
Once you have entered the 3 IdP fields and have uploaded the IdP certificate into KnowledgeOwl, make sure that the **Enable SAML SSO** checkbox is checked, and **Save** the SSO Settings page.



Step 4: Add the KnowledgeOwl SP info to your IdP

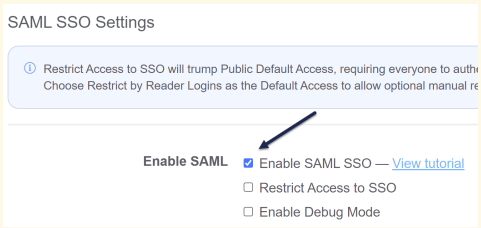
Now that KnowledgeOwl has your information, you will need to grab some data from KnowledgeOwl to add into AD FS.

1. **In KnowledgeOwl, click on the View KnowledgeOwl SP Metadata button underneath your IdP Certificate.**

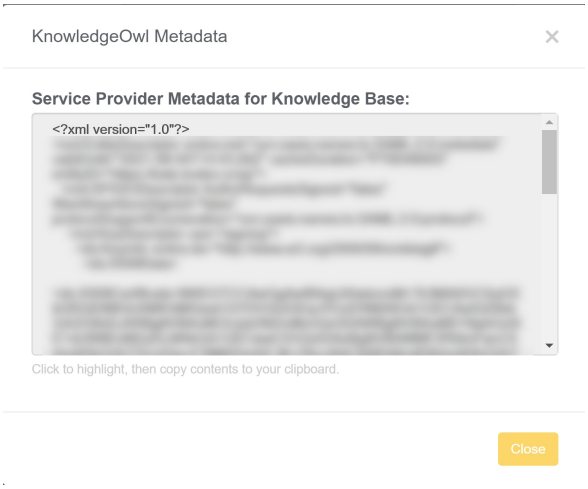


2. **This will open up a pop-up with KnowledgeOwl XML metadata within it.**

If you aren't seeing any metadata, ensure that you've checked the box to "Enable SAML SSO" and saved. The metadata is only generated after this option is saved.

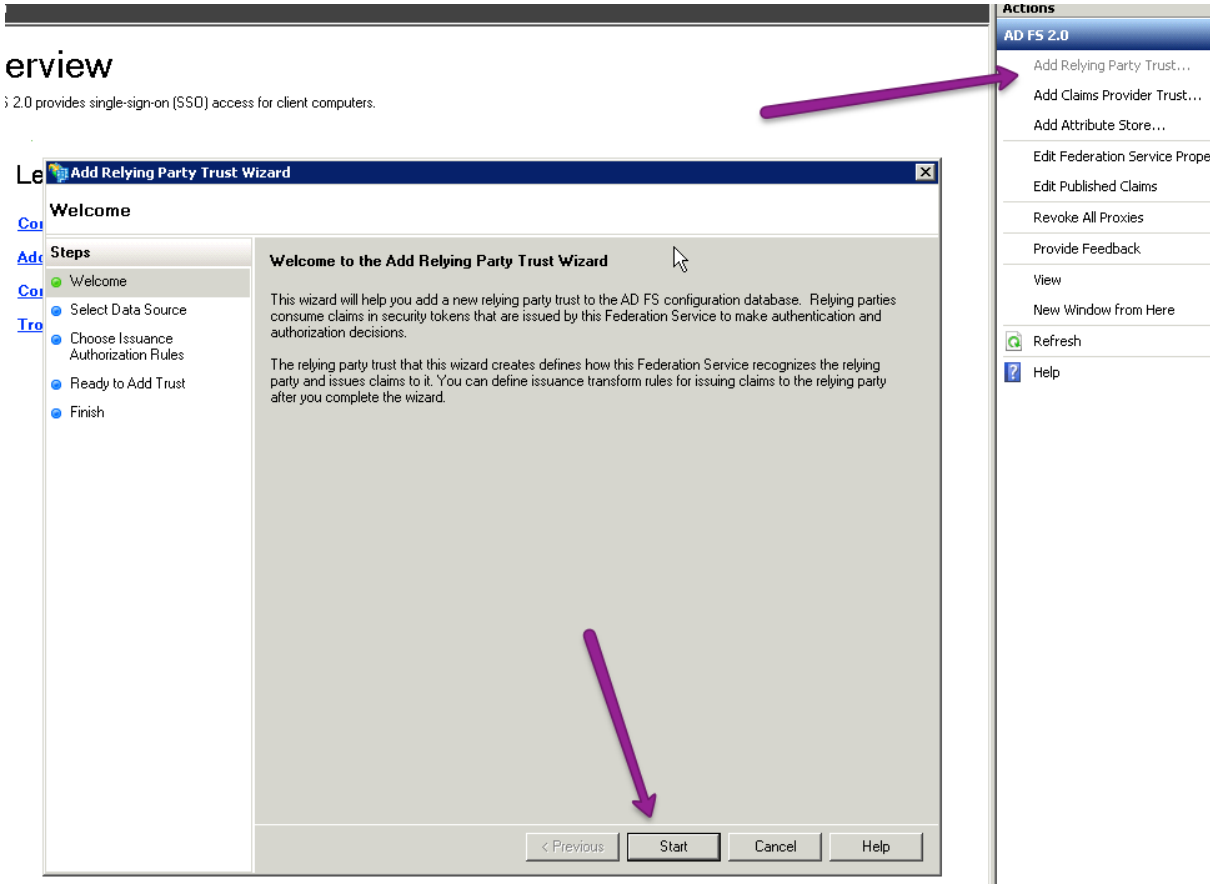


3. **Click anywhere in the Service Provider Metadata for Knowledge Base pop-up to highlight the full XML contents and copy it.**



4. **Open up a simple text editor of your choice (Notepad works well).**
5. **Paste the metadata text into Notepad.**
6. **Choose File > Save as...**
7. **Change the Save as type: to All Files. Save the file as ko-metadata.xml (the .xml extension is required!).**

8. In AD FS, click on **Add Relying Party Trust...** which will open up the **Add Relying Party Trust Wizard**. Click on **Start** within that wizard.



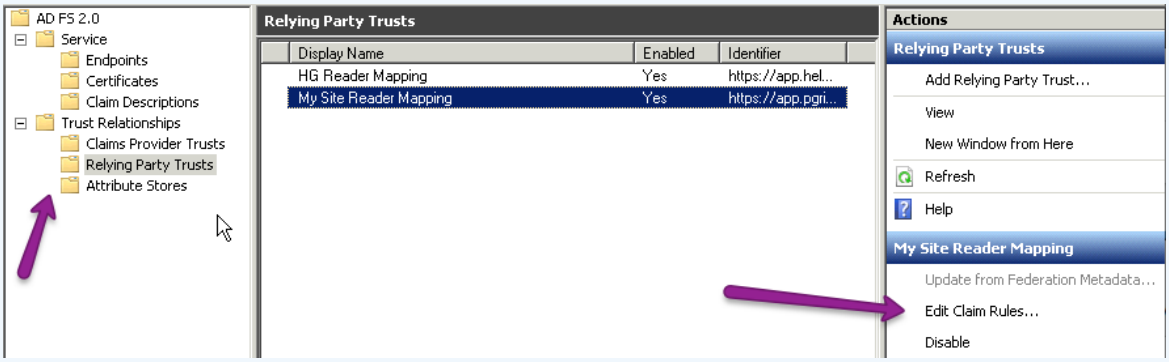
9. On the next screen, select **Import data about the relying party from a file.**

10. Browse to the XML metadata that we saved in Step 7 and choose **Next.**

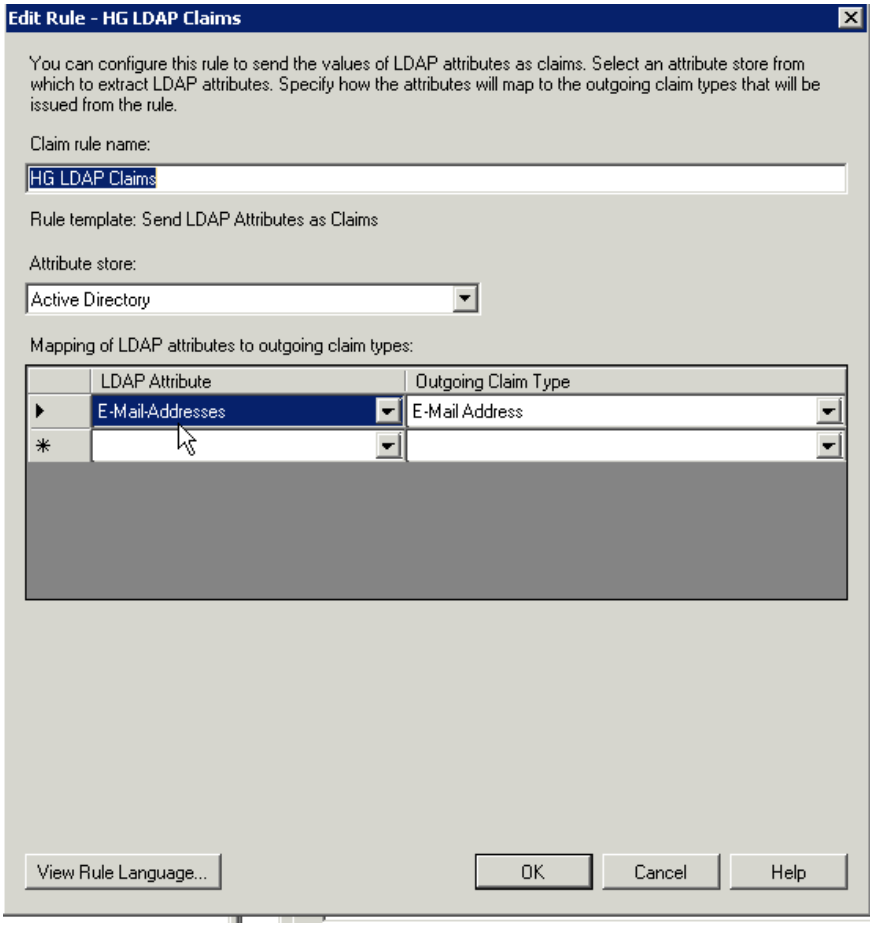
11. Choose a name that makes sense, such as "KnowledgeOwl SSO", add whatever notes you would like, and click **Next.**

12. For most setups, you can click next until you finish this wizard, which should open up the **Edit Claim Rules** dialog.

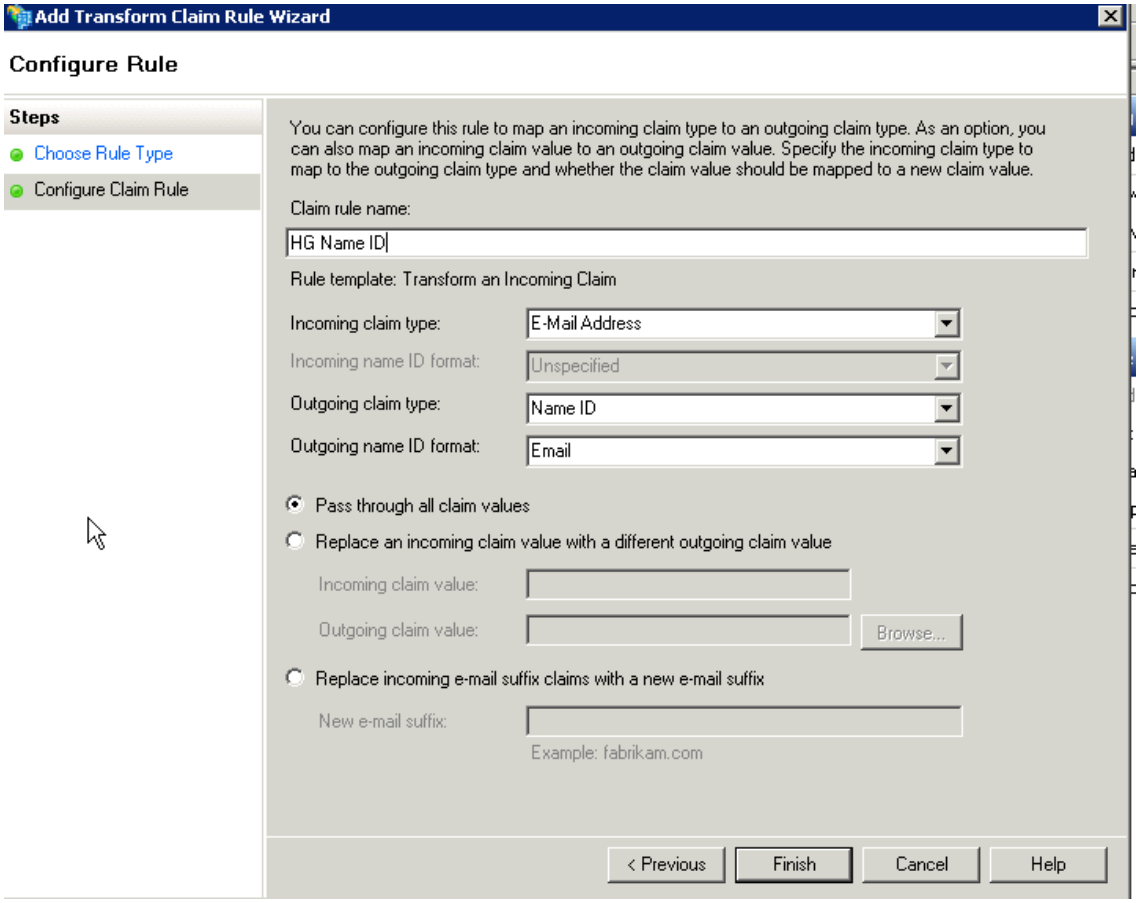
If the **Edit Claim Rules** dialog does not open automatically, you can navigate to it by going to **Trust Relationships > Relying Party Trusts**, select the trust identifier you created in Step 11, and click on **Edit Claim Rules...**.



13. In the **Edit Claim Rules** dialog click on **Add Rule...**
14. Choose the default **Send LDAP Attributes as Claims** and click **Next.**
15. Here you can choose what information you want to send to KnowledgeOwl. At the very least you need to send the E-Mail Addresses.



16. Click on **Add Rule...** again.
17. This time under **Claim rule template:** choose **Transform an Incoming Claim** and click Next.
18. Set the **Claim rule name** to KO Name ID or something similar.
19. Set the **Incoming claim type** to E-Mail Address.
20. Set the **Outgoing claim type** to Name ID.
21. Set the **Outgoing name ID format** to Email.
22. Be sure the option to **Pass through all claim values** is selected. Your configuration should look a bit like this:



23. Click **Finish.**

Step 5: Enable debug mode

AD FS may send the attribute claims over in a way that you are not expecting.

In order to view how AD FS is sending the claims, in Knowledgeowl:

1. In **Settings > SSO** in the **SAML Settings** tab, check the box next to **Enable debug mode.**
2. **Save.**
3. In a private browser window or in an incognito tab, copy and paste the **SP Login URL** into the address bar. If the above steps were done correctly, you should be asked to log into your AD server where you will be redirected back to your knowledge base.
4. In debug mode, you'll then see a list of the IdP attributes that ADFS is sending over.
5. Keep this window open while you work on Step 6. Once you're done with Step 6, be sure to uncheck the box next to **Enable debug mode** and re-save the settings.

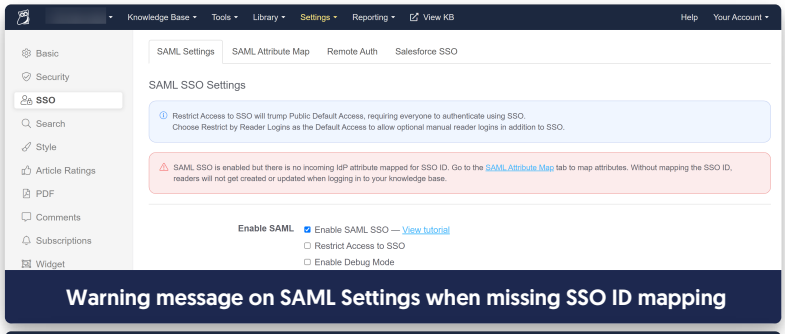
Step 6: Map SAML attributes to fields in KnowledgeOwl

With your debug window open, you can now map SAML attributes to fields in KnowledgeOwl. To do so:

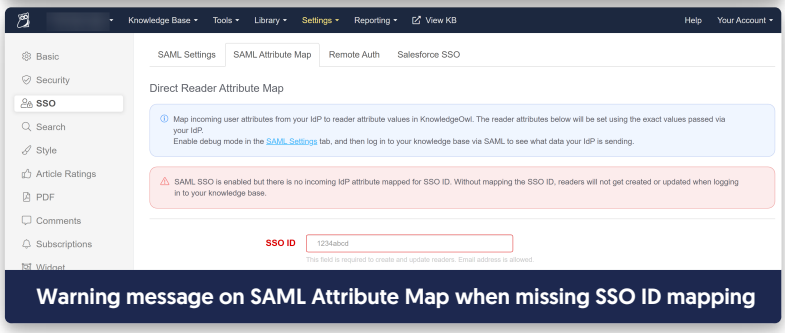
1. In KnowledgeOwl, go to **Settings > SSO.**

2. Open the **SAML Attribute Map** tab.
3. In your debug output, locate the **attribute value** that contains your email address, and copy the **Attribute Name** exactly as it appears after the colon.
4. On the SAML Attribute map tab of KnowledgeOwl, paste that attribute name into the fields for **SSO ID** and **Username / Email**.
5. To map additional fields, repeat this process. See Direct Reader Attribute Map for more information.
    - If you cannot directly map an IdP attribute to a KnowledgeOwl reader attribute, you can use Custom Attribute Map Rules to do some mappings or logic for you. See the help page on those rules for more info.
6. Once you're done mapping fields, uncheck the **Enable debug mode** checkbox.
7. **Save** all your changes.
8. In the tab or window that contained the debug information, click on the **Re-login to see any changes** link at the top to log in through AD FS again. If everything was successful, you will be logged into your knowledge base and you will now have a working SAML SSO integration with AD FS.

The SSO ID is a required mapping. If you don't set it up, you'll see warning messages in **Settings > SSO** in both the **SAML Settings** tab and the **SAML Attribute Map** tab:



Warning message on SAML Settings when missing SSO ID mapping



Warning message on SAML Attribute Map when missing SSO ID mapping

Step 7: Optional settings

With your AD FS SAML SSO login working, you can now review two additional options:

- To make it so that SAML SSO is the **only** access method for your knowledge base, check the **Restrict Access to SSO** box in **Settings > SSO** and **Save**. This will override the Default Access selection in **Settings > Security**.
- If you'd like to use the AD FS SAML SSO as your only or primary reader authentication mechanism, set the **Default Login Page** in **Settings > Security** to SAML Login URL and **Save**.

See SSO options for different knowledge base setups for more information.

Configure SSO with Azure Active Directory (Azure AD)

Last Modified on 05/29/2024 5:27 pm EDT

Configure SSO with Google Workspace

Last Modified on 05/29/2024 5:28 pm EDT

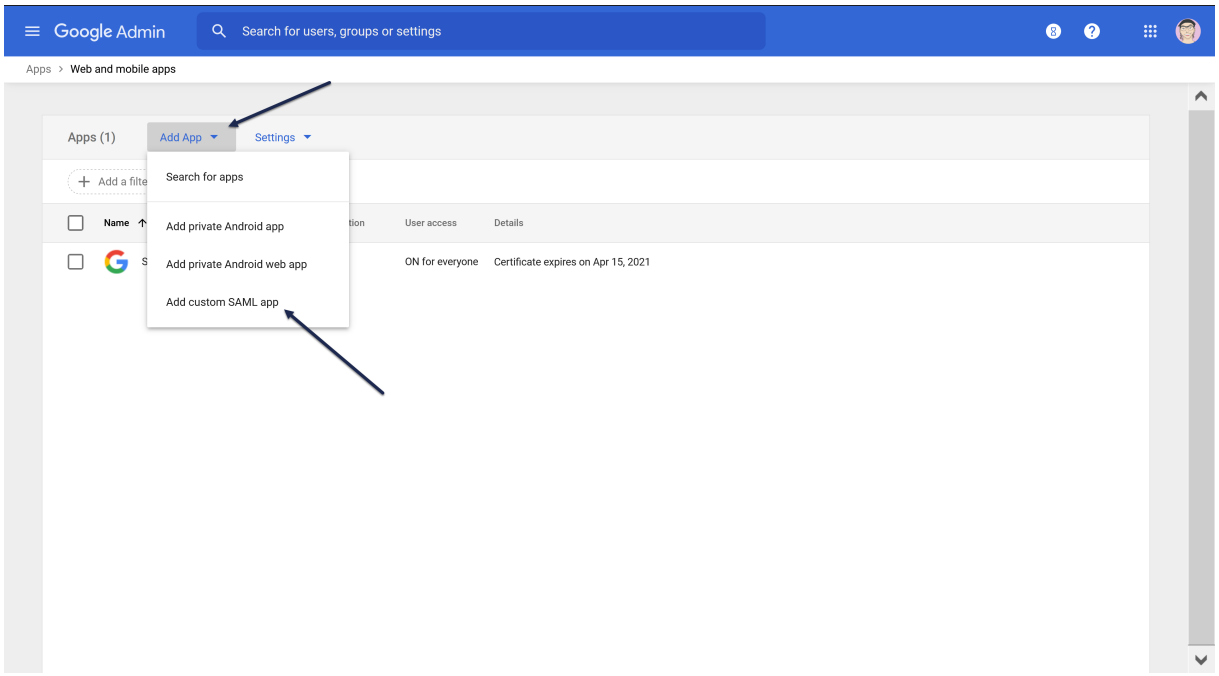
In order to set up your knowledge base to use SSO with Google Workspace (formerly G Suite and/or Google Apps), you'll need to:

- In Google Workspace, create a SAML app for SSO and add some KnowledgeOwl info.
- Update info in KnowledgeOwl to capture that SAML app info.

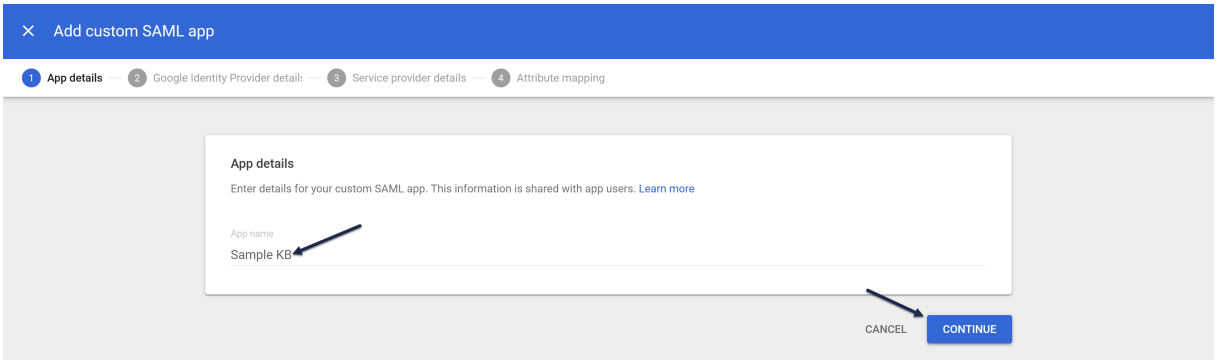
Step 1: Create a Google SAML app for SSO

These instructions are adapted from the Google Workspace instructions to create your own custom SAML app in Google Workspace. We don't actively maintain the Google steps of these instructions; when in doubt, review Google's own documentation: Set up your own custom SAML application

1. In Google Workspace Admin Console, go to **Apps > Web and mobile apps**.
2. Click on **Add app.**
3. Select **Add custom SAML app.**



4. In the **App name** field, add a name that will help you identify this SAML app as belonging to your knowledge base, like KnowledgeOwl SSO. Here, we use Sample KB:



5. Then click **Continue.**

Step 2: Add Google IdP details to KnowledgeOwl and enable SAML SSO

After you click Continue above, you'll be directed to the **Google Identity Provider detail** page. Google offers two options for getting the IdP info KnowledgeOwl will need; we'll use Option 2: Copy the SSO URL, entity ID, and certificate:

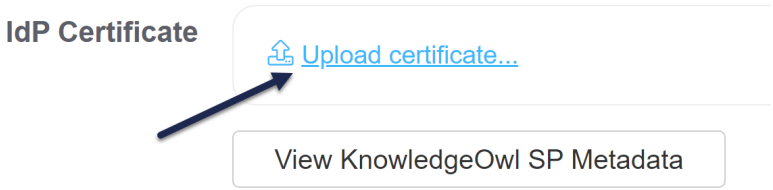
For each of these steps, you'll be adding data from Google into KnowledgeOwl, in the **Settings > SSO** page, on the **SAML Settings** tab:

From

1. Copy the Google Apps **SSO URL** and paste it into the KnowledgeOwl **IdP Login URL.**
2. Copy the Google Apps **Entity ID** and paste it into the KnowledgeOwl **iDP entityID.**



3. Download the **Certificate** from Google.
4. Upload it to KnowledgeOwl by clicking the **Upload certificate** link in the **IdP Certificate** section:



5. In KnowledgeOwl, check the box to **Enable SAML SSO.**
6. Click the green **Save** button in KnowledgeOwl and click Continue in Google.

Step 3: Add your KnowledgeOwl service provider details into Google

This is for the step(s) related to **Service Provider Details** in the Google instructions. Again, this references fields in KnowledgeOwl in **Settings > SSO**, in the **SAML Settings** tab:

1. Copy the KnowledgeOwl **SP Login URL** and paste it into the Google **ACS URL** field.
2. Copy the KnowledgeOwl **SP Entity ID** and paste it into the Google **Entity ID** field.
3. Select EMAIL in the **Name ID Format**, ensure **Name ID** is set to **Basic Information > Primary email**, and click **Continue** in Google.

Step 4: Attribute mapping and enable Google app

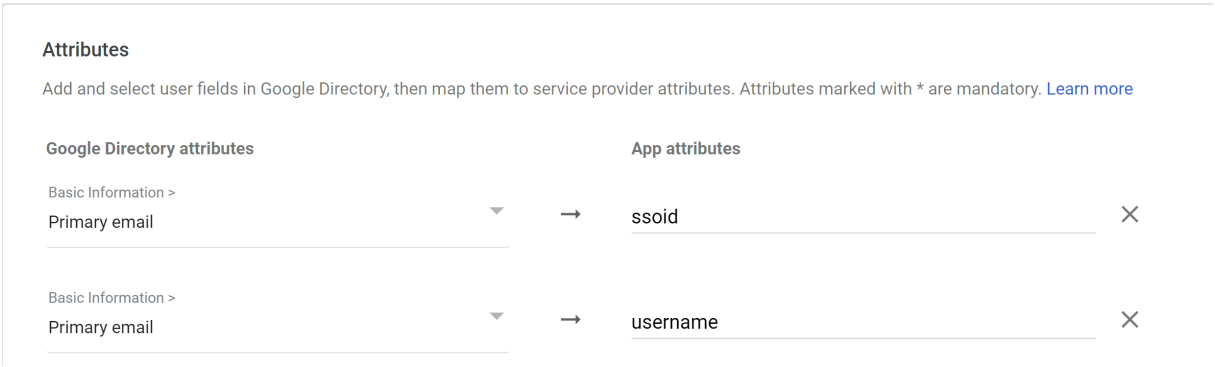
In order for KnowledgeOwl to get information about your readers to properly log them in, you need to map attributes from Google to KnowledgeOwl. There are two required fields and several optional.

1. In Google, on the **Attribute mapping** page, click **Add another mapping** to map additional attributes.
2. Choose **Basic Information > Primary Email** as the Google Directory attribute and `ssoid` as the App attribute.

   If you don't set up SSO ID, you'll see warnings in both the **SAML Settings** tab and the **SAML Attribute Map** tab. See Missing SSO ID mapping warning for more info.

3. Choose **Basic Information > Primary Email** as the Google Directory attribute and `username` as the App attribute.



4. Repeat for any of the optional attributes you'd like to use:
   a. **First Name**
      Choose **Basic Information > First Name** as the Google Directory attribute and `first_name` as the App attribute.



   b. **Last Name**
      Choose **Basic Information > Last Name** as the Google Directory attribute and `last_name` as the App attribute.



c. **Picture / Icon**
   For the Google Directory attribute, choose the category and attribute containing the URL to the user icon (this is usually **Custom > Icon** but depends on your configuration). Use `icon` as the App attribute.



d. **Groups**
   For the Google Directory attribute, choose the category and attribute containing the group or groups (this is usually **Custom > Groups** but depends on your configuration). Use `reader_roles` as the App attribute.



   - In order for this mapping to work, KnowledgeOwl must have Reader Groups with names that exactly match the group names as they appear in Google.
   - To assign a reader to multiple reader groups, put a comma-separate list of groups in the attribute with no spaces after the comma.

e. **Custom Fields 1-5**
   If you are using Custom Fields for your readers, use the Google Directory attribute that makes sense, and use `custom_1`, `custom_2`, `custom_3`, `custom_4`, or `custom_5` for each of the custom fields in the App attributes, respectively.



5. Click **Finish.**
6. In **Apps > Web apps**, select your SAML app.
7. Click **User access.**
8. Most likely, you'll want to turn the app **ON for everyone**; review Google's documentation on enabling it for specific organizational units.
9. In an Incognito window or tab, test logging in using the **SP Login URL** in KnowledgeOwl and your Google credentials. If you've set everything up successfully, login will work. If login doesn't work properly, see the Troubleshooting section below.

Step 5: Optional KnowledgeOwl settings

With your SAML SSO login working, you can now review two additional options:

- To make it so that SAML SSO is the **only** access method for your knowledge base, check the **Restrict**

Access to SSO box in **Settings > SSO** and **Save**. This will override the Default Access selection in **Settings > Security**.

- If you'd like to use the SAML SSO as your only or primary reader authentication mechanism, set the **Default Login Page** in **Settings > Security** to SAML Login URL and **Save**.

See SSO options for different knowledge base setups for more information.

Troubleshooting Google issues

Issue	Possible Resolution
Error app_not_configured_for_user when trying to log in	This can mean you have the wrong Entity ID in your SAML app for SSO. It should literally be "https://app.knowledgeowl.com/sp" – no need to replace anything.
Redirected to the KnowledgeOwl login screen after authentication	This can mean you have the wrong ACS URL in your G Suite SAML app for SSO. It should look like the URL below, with the highlighted section replace with your KnowledgeOwl subdomain: https://gsuite.knowledgeowl.com/help/saml-login. You can view and customize your subdomain under **Settings > Basic**, or quickly check your subdomain by clicking View KB.
Redirected to the Google login screen after authentication	This can mean you have an incomplete ACS URL. It might be missing "/help/saml-login". It should look like the link below, with the highlighted portion replaced with your KO subdomain: https://gsuite.knowledgeowl.com/help/saml-login

Review Google's own documentation for help with additional errors:
https://support.google.com/a/answer/6301076?hl=en&ref_topic=7559288

SSO Advanced Options

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The SAML SSO Settings offers several Advanced Options:

- **Use a unique SP entity ID for this knowledge base:** With this option selected, Entity ID and metadata will be updated upon saving.
- **Issue a remote logout request using the IdP logout URL when a reader logs out:** With this option selected, when a reader logs out of KnowledgeOwl, it will also send a logout request to to the IdP.
- **On IdP initiated SSO, send readers to the RelayState specified landing page:** Check this box if people are clicking links to specific articles, authenticating, and then getting kicked back to the homepage rather than redirected to the link they originally clicked. (The default behavior is to send readers to the homepage. Using this option will send readers to the RelayState specified landing page a.k.a. the page they were originally trying to access!)
- **Sign all messages coming from this SP**
- **Sign metadata coming from this SP**
- **Sign all logout requests coming from this SP**
- **Require all IdP assertions to be signed**
- **Require all IdP messages to be signed**
- **Require all IdP assertions to be encrypted**
- **Author login on SSO ID match only:** For KnowledgeOwl authors (not readers), the default behavior for ID matching is to login as an author with matching SSO ID. If no matching SSO ID is found, we then fall back to match on username / email. With this option selected, username / email will be ignored and only the SSO ID match is used for author account logins.

Direct Reader Attribute Map

Last Modified on 05/29/2024 5:28 pm EDT

Once you have the SP info added to your IdP, the IdP info and certificate added to KnowledgeOwl, and have enabled SAML SSO, you'll need to map SAML attributes. This allows KnowledgeOwl to properly create / update readers in your account when they log in, and ensures they see the correct content when they do.

Direct Reader Attribute Mappings take the exact value of an attribute coming from your IdP and map it to an existing KnowledgeOwl field.

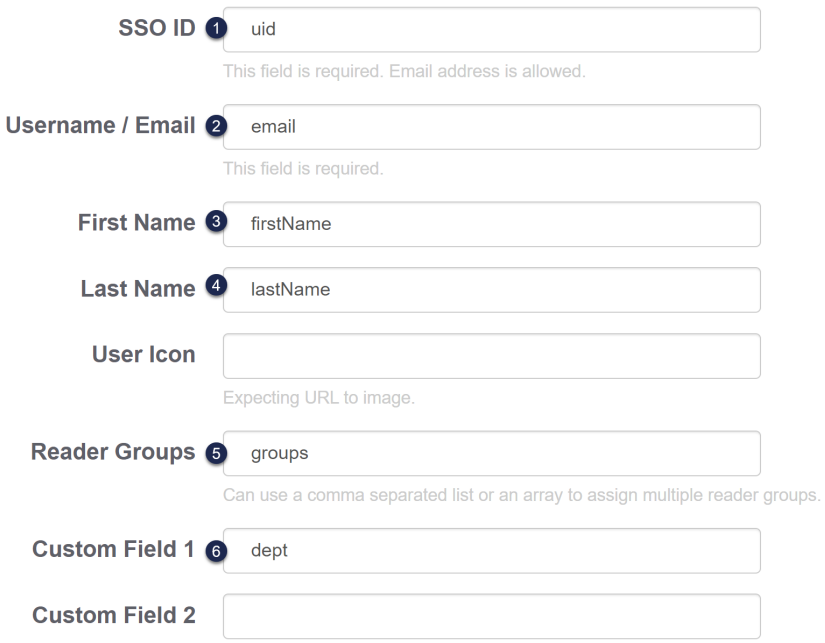
To add these mappings:

1. Go to **Settings** > **SSO**.
2. Open the **SAML Attribute Map** tab.
3. For each attribute you would like mapped between your IdP and KnowledgeOwl, add the name of the attribute field as it appears in your IdP into the corresponding field in the map.

   At minimum, you MUST map a unique ID (SSO ID) and an email address. The reader's email address can be used as both the SSO ID and their email address if this is preferred.

4. If you cannot use a direct reader attribute mapping for a field, consider using Custom Attribute Map Rules instead. Direct reader attribute mappings always overwrite custom attribute mappings--if you're using custom attribute map rules to set the value for a field, you should leave the direct mapping blank for that field.
5. **Save** your mappings.

Here's a sample Direct Attribute mapping:



This will map the incoming values from my IdP:

1. **The IdP 'uid' attribute will be entered into the KnowledgeOwl SSO ID field.**
2. **The IdP 'email' attribute will be entered into the KnowledgeOwl Username / Email field.**
3. **The IdP 'firstName' attribute will be entered into the KnowledgeOwl First Name field.**
4. **The IdP 'lastName' attribute will be entered into the KnowledgeOwl Last Name field.**
5. **The IdP 'groups' attribute will be entered into the KnowledgeOwl Reader Groups field.**
6. **The IdP 'dept' attribute will be entered into the KnowledgeOwl Custom Field 1 field.**

See Create a reader for more information on what these reader fields mean and where you can see them.

Custom Attribute Map rules

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Sometimes, a direct reader attribute mapping is not possible.

We generally see this situation arise with:

- Groups, either because the IdP doesn't have groups, or the groups the IdP has are not relevant to KnowledgeOwl.
- Custom fields that have a different value/meaning in your IdP and need to be "translated" to a different value in KnowledgeOwl.

In these situations, it can be useful to define a rule that will look at some attribute coming from the IdP and then update a KnowledgeOwl field based on that rule. We call these Custom Attribute Map Rules (CAMR).

There are two things to keep in mind when working with CAMRs:

- **Direct reader attribute mappings always overwrite custom attribute mappings.**
  This means that you can't, for example, have a direct mapping for the Reader Groups field and also have a custom attribute map rule that sets the Reader Groups field. The direct mapping will always override the CAMR. As a general rule of thumb, if you're going to set a field using a CAMR, it's best to leave the direct mapping for it blank.
- At this time, **only one rule can be applied to a specific reader/attribute combination.**
  If you have five rules for what happens with the groups field, only the first rule that is a match will be applied for a given reader, even if a reader technically matches all 5 rules. Generally, the oldest rule is the one which is applied first.

We offer three types of CAMRs:

1. **Default**: The simplest of rules, the default rule will check to see if a specified IdP attribute is present at all, and will set a reader field when it is. It does not care what the actual value of the IdP attribute is.

2. **Exact matches**: These will look for an exact match for an attribute value coming from the IdP and set a reader field only when it finds that exact match.

3. **Regex pattern**: The most flexible and complex rule, in these you can define a regular expression (regex) pattern to match an IdP value, and set a reader field accordingly. We use the PHP flavor of regex.

Default rules

Default rules are our simplest rule. The rule basically says: if an incoming IdP attribute has *any* value, set the selected KnowledgeOwl field for the reader.

It does not matter what the value of the attribute actually is.

You can only set one default rule per IdP attribute name (so, for example, you can't have two default rules that both checked the custom1 attribute coming from your IdP).

Default rules will show a rule logic of **IS EQUAL TO * (anything)** in the display:



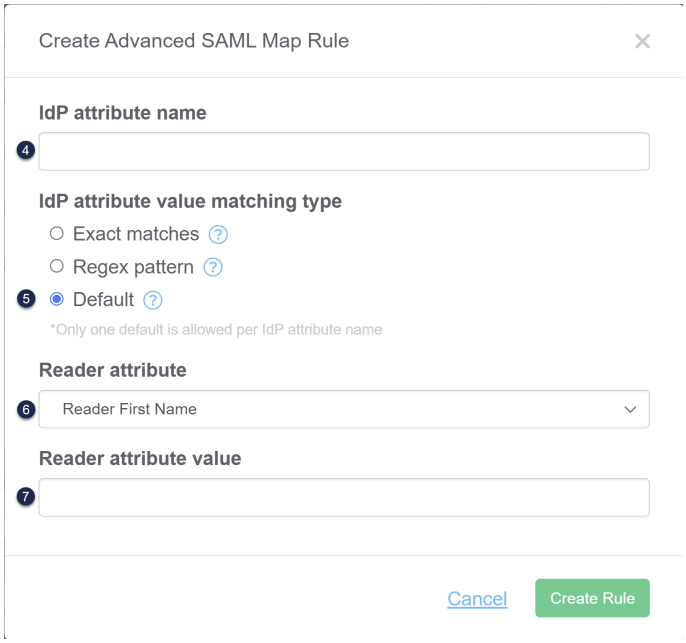
Use case

Default rules are a fantastic choice if you want to assign all readers to one or more reader groups, or set one of the custom fields to be the same value for all SSO readers.

Setup

To create a default rule:

1. Go to **Settings > SSO**.
2. Open the **SAML Attribute Map** tab.
3. Click the **+ Create New Rule** button in the **Custom Attribute Map Rules** section. This will open a pop-up where you can define the rule:



4. Add the **IdP attribute name** you'd like to base the rule on. This should be formatted exactly as it appears in the IdP.
    - If you're not sure of the attribute name, you can review your IdP settings or **Enable debug mode** in the

SAML Settings tab and try to login--you should see a full list of the attributes coming from the IdP.

- For a default rule you'd like applied to all readers coming in through SSO, use any attribute that is always populated from your IdP. Email address, username or user ID, first name, or last name are often good candidates.

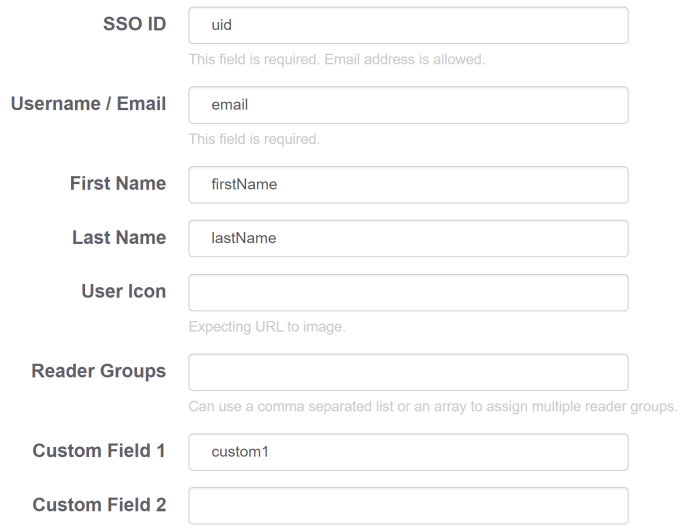
5. Select **Default** as the IdP attribute value matching type.
6. Use the **Reader attribute** dropdown to select the reader field you'd like to update based on this rule.
7. Add the **Reader attribute value** you'd like that reader attribute set to.
8. Click **Create Rule**.

Once created, you'll be able to see, edit, and delete the rule in the **Custom Attribute Map Rules** section.

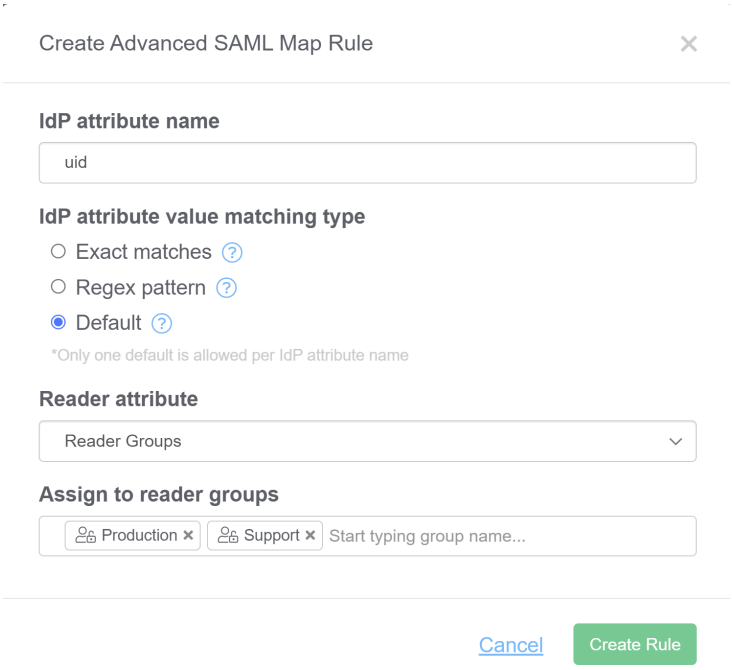
Example

To set all of your incoming SSO readers to a single group, you can match against an IdP attribute which is always populated, such as the userID or email address.

Here, we have left the Reader Groups field mapping empty in the direct attribute mapping list:



And we've set up a default rule using our incoming user ID field, which is called uid in our IdP and cannot be empty, to assign all readers to the Production and Support reader groups:



Once saved, this rule logic displays like this:



With this rule in place, every reader who logs in will be assigned to the Production and Support Reader Groups.

Exact matches rules

With exact match rules, you define the incoming IdP attribute the rule should examine as well as a specific value it should match. If the exact value is matched when a reader authenticates, it will set a reader field based on the rule.

You should not use exact match rules when an incoming attribute is an array (like a list of groups). We collapse array attributes into a single field. For attributes containing arrays, use a regex rule to match within the array.

Default rules will show a rule logic of IS EQUAL TO *value* in the display; if you add multiple exact matches, the IS EQUAL TO will show the exact matches as an OR list in square brackets:

Reader field: Custom Field 1
IdP attribute: country
Rule logic:
IF
country
IS EQUAL TO
[US **OR** USA **OR** United States of America]
SET
Custom Field 1
TO
United States

Use case

The exact match rule is useful when you have a specific attribute value in your IdP that you'd like to transform into a different value in KnowledgeOwl.

For example, maybe your company operates in five offices in three countries, and your IdP captures an office attribute for each employee.

But in your knowledge base, you don't care about offices. You have a reader group for each country only.

You can set up an exact match rule for the offices of each country to map your readers to those groups:

- office attributes: Colorado or New York > US employees reader group
- office attributes: London or Manchester > UK employees reader group
- office attribute: Melbourne > Australia employees reader group

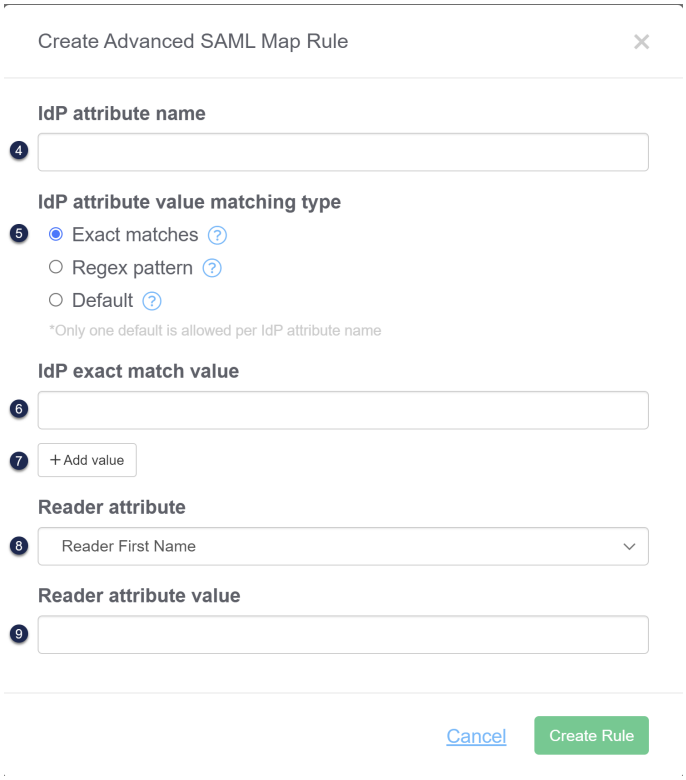


Exact matches are true exact matches; if you need to do a fuzzier or more flexible match, use a regex rule.

Setup

To create an exact match rule:

1. Go to **Settings > SSO**.
2. Open the **SAML Attribute Map** tab.
3. Click the **+ Create New Rule** button in the **Custom Attribute Map Rules** section. This will open a pop-up where you can define the rule:



4. Add the **IdP attribute name** you'd like to base the rule on. This should be formatted exactly as it appears in the IdP.
    - If you're not sure of the attribute name, you can review your IdP settings or **Enable debug mode** in the **SAML Settings** tab and try to login--you should see a full list of the attributes coming from the IdP.
5. Select **Exact matches** as the IdP attribute value matching type (this is usually selected by default).
6. Add the exact value of of the incoming attribute you'd like to match against as the **IdP exact match value**.
7. If you'd like to look for multiple values to match against, click the **+ Add value** button to add additional values for this rule.
    - Multiple values will be treated as OR values--the exact match will match for the first value OR the second value OR the third value, etc.
8. Use the **Reader attribute** dropdown to select the reader field you'd like to update based on this rule.
9. Add the **Reader attribute value** you'd like that reader attribute set to.
10. Click **Create Rule**.

Once created, you'll be able to see, edit, and delete the rule in the **Custom Attribute Map Rules** section.

Example

Let's say our company operates in five offices:

- Denver, Colorado
- New York, New York
- London, England
- Manchester, England

- Melbourne, Australia

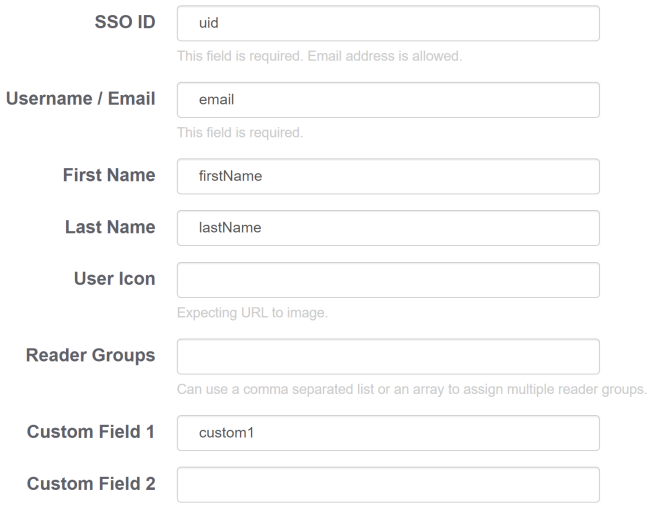
We've set up reader groups in our knowledge base for each country:

- US employees
- UK employees
- AUS employees

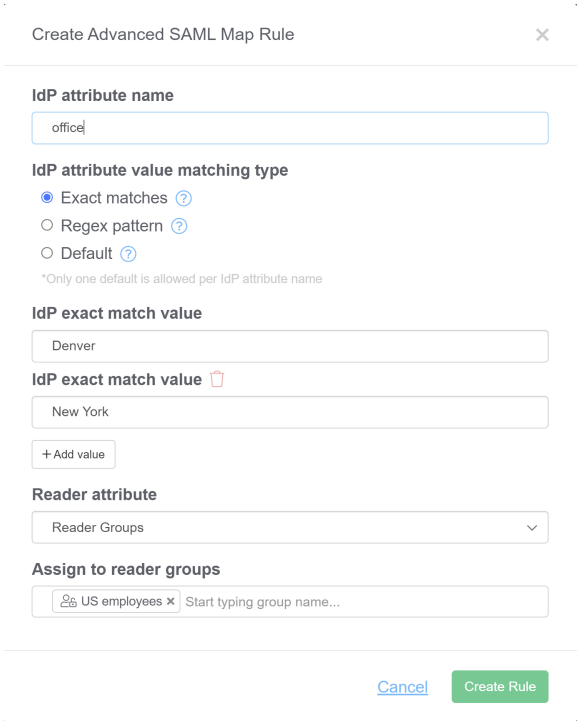
An employee can only belong to one office, and our IdP tracks this information for each employee in an "office" field.

We want to set up a rule that will check that office field and then assign readers to the appropriate country employee group.

We won't use direct mappings for our groups field:



And we'll create three different exact match rules, one for each country. Here's how I set up the US employees rule (note that we used the + Add value button so we have two exact matches in the list, since we have two offices in the US):



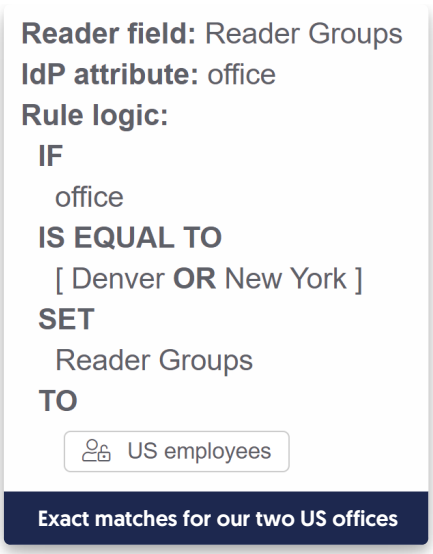
Here's the final configuration for the rules all three countries:

Reader field: Reader Groups
IdP attribute: office
Rule logic:
IF
office
IS EQUAL TO
Melbourne
SET
Reader Groups
TO
AUS employees

Exact match for our Australia office

Reader field: Reader Groups
IdP attribute: office
Rule logic:
IF
office
IS EQUAL TO
[London **OR** Manchester]
SET
Reader Groups
TO
UK employees

Exact matches for our two UK offices



With this rule in place, every reader who logs in with an office in Melbourne will be assigned to the AUS employees reader group; every reader who logs in with an office of either London or Manchester will be assigned to the UK employees reader group, and every reader who signs in with an office of either Denver or New York will be assigned to the US employees reader group.

Regex pattern rules

Regex rules are the most complicated, but also the most flexible. Regex is a common abbreviation of 'regular expressions'. Regular expressions are "a sequence of characters that specifies a *search pattern*. Usually such patterns are used by string-searching algorithms for "find" or "find and replace" operations on strings, or for input validation." (from Wikipedia - Regular expression).

For regex Custom Attribute Mapping Rules, you define a regex pattern you'd like to search for, and then define the KnowledgeOwl field and value you'd like to set when that pattern is found.

We recommend only using these rules when neither of the other custom rule types will meet your needs, as they are a bit harder to write and more intimidating if you're not familiar with regex. If an attribute you'd like to use is an array containing a list of values, you must use regex to properly search and match within that list.

regex101 is a handy site that allows you to try out regex rules against example words and phrases. When testing regex for use in KnowledgeOwl, select **PCRE2 (PHP >= 7.3)** under **FLAVOR**.

Regex pattern rules will show a rule logic of **MATCHES** [pattern] in the display:

Reader field: Custom Field 2
IdP attribute: custom1
Rule logic:
IF
custom1
MATCHES
/Brie/i
SET
Custom Field 2
TO
Cheese lover

Use case

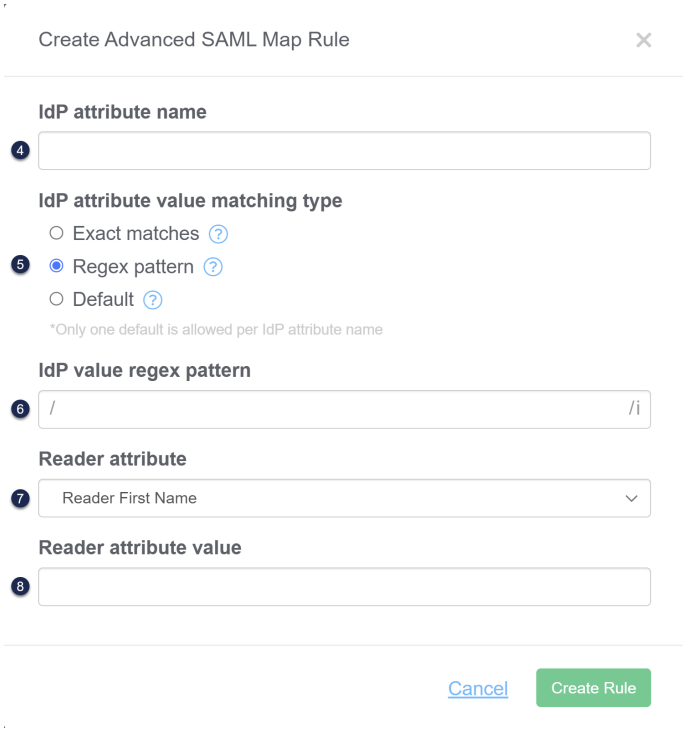
Regex pattern rules are useful when there are patterns within one of your IdP attributes that doing exact matches for might be tedious. For example, if all our internal IdP groups are prefixed with KO_ and all of our contractor or customer IdP groups are prefixed with EXT_, and we really only care about this KO/not-KO distinction, a regex rule makes more sense than generating very large exact match rule lists.

See Auto-Assign Groups By Email Rules (SSO Edition) for a walkthrough on how to set up a rule to auto-assign everyone at a given email domain to one or more reader groups.

Setup

To create an exact match rule:

1. Go to **Settings > SSO**.
2. Open the **SAML Attribute Map** tab.
3. Click the **+ Create New Rule** button in the **Custom Attribute Map Rules** section. This will open a pop-up where you can define the rule:



4. Add the **IdP attribute name** you'd like to base the rule on. This should be formatted exactly as it appears in the IdP.
    - If you're not sure of the attribute name, you can review your IdP settings or **Enable debug mode** in the **SAML Settings** tab and try to login--you should see a full list of the attributes coming from the IdP.
5. Select **Regex pattern** as the IdP attribute value matching type.
6. Add the regex pattern you'd like to match that attribute value against as the **IdP value regex pattern**.
7. Use the **Reader attribute** dropdown to select the reader field you'd like to update based on this rule.
8. Add the **Reader attribute value** you'd like that reader attribute set to.
9. Click **Create Rule**.

Once created, you'll be able to see, edit, and delete the rule in the **Custom Attribute Map Rules** section.

Example

Let's say the KnowledgeOwl IdP is used for authenticating KnowledgeOwl employees as well as KnowledgeOwl customers. Our employees might be segmented into different groups, like:

- KO_Support
- KO_Security
- KO_Development

Whereas our customers might be segmented into groups based on subscription plan:

- EXT_Flex
- EXT_Business
- EXT_Enterprise

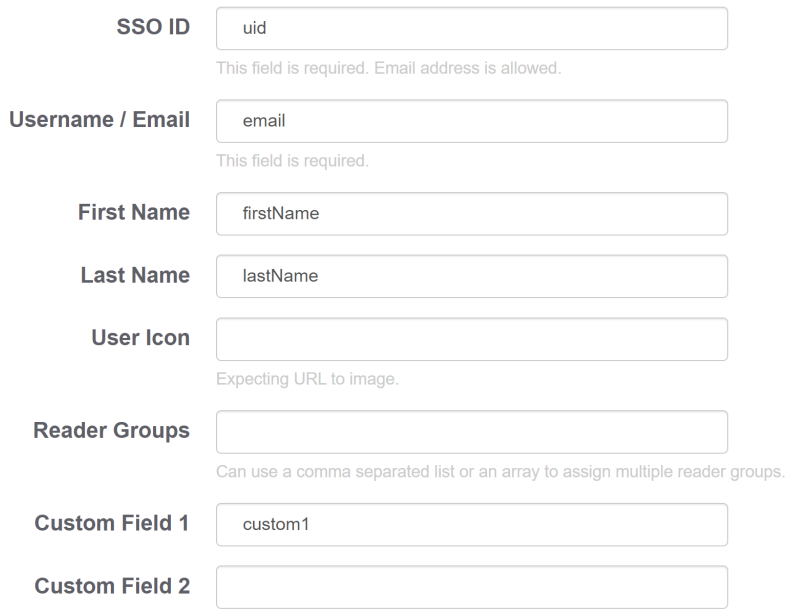
Within our knowledge base, we only segment content by two reader groups:

- Internal users (KO employees)
- External users (Customers)

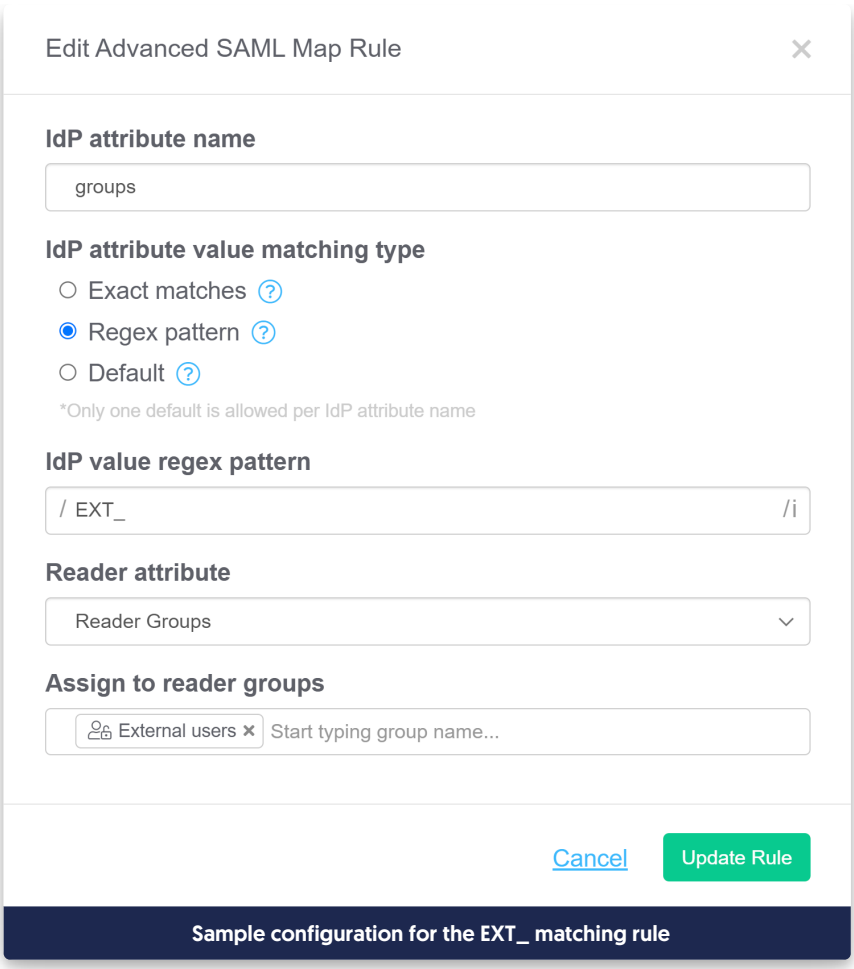
No account belongs to both KO_ groups and EXT_ groups.

Since the two never overlap, we could create two regex pattern rules to look for these prefixes and assign our users to the appropriate reader group in our knowledge base.

We would not include groups in our direct mapping:



And we could create a regex rule that looks for each of our prefix strings: Here's the rule looking for our EXT_ prefix:

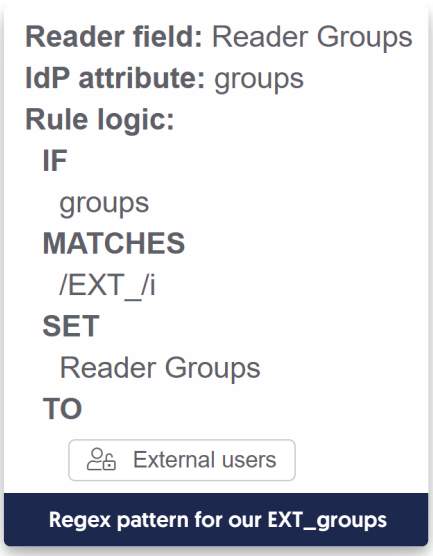


Sample configuration for the EXT_ matching rule

Here's what the two rules look like:

Reader field: Reader Groups
IdP attribute: groups
Rule logic:
IF
groups
MATCHES
/KO_/i
SET
Reader Groups
TO
Internal users

Regex pattern for our KO_ groups



With these rules in place:

- **Anyone with any IdP KO_ group would be assigned to the Internal users reader group**
- **Anyone with any IdP EXT_ group would be assigned to the External users reader group**

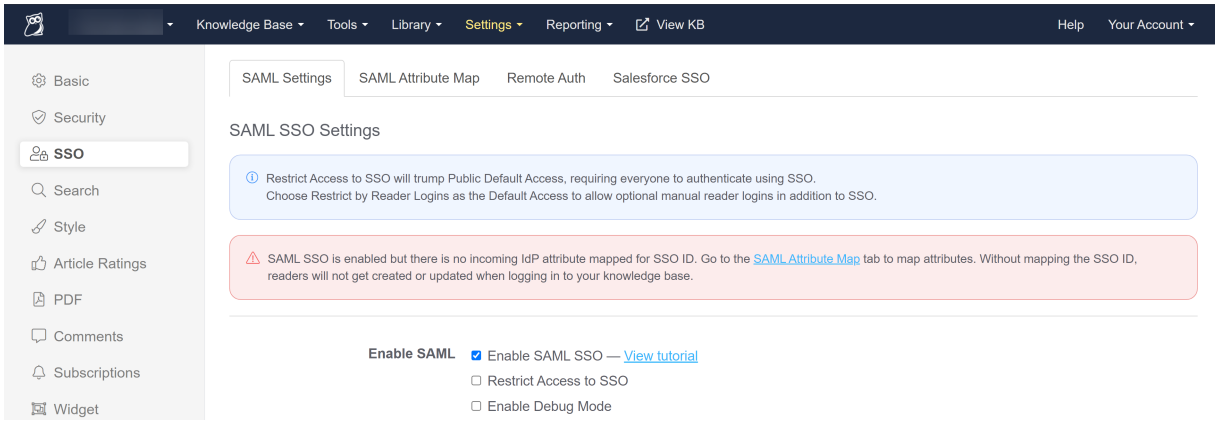
Missing SSO ID mapping warning

Last Modified on 05/29/2024 5:28 pm EDT

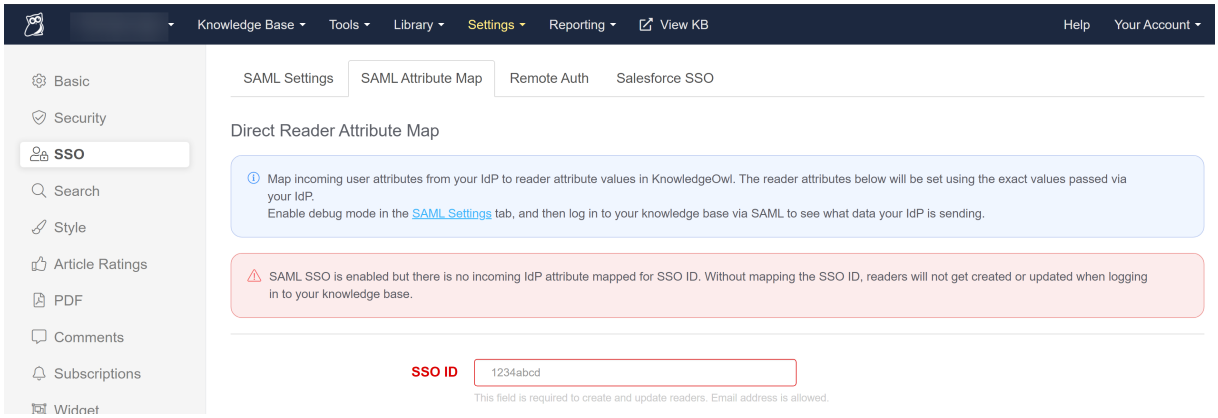
With all forms of Single Sign-On (SSO), you must set up a SAML Attribute map for at least the SSO ID. This ensures that readers will be created and updated when logging in to your knowledge base.

If you don't have this required mapping set up, you will see two warnings in Settings > SSO that "SAML SSO is enabled but there is no incoming IdP attribute mapped for SSO ID." These warnings appear:

- **In the SAML Settings tab:**



- **And in the SAML Attribute Map tab:**



To make the warnings go away, be sure you have a SAML Attribute mapping entered for at least the SSO ID in Settings > SSO > SAML Attribute Map. See Direct Reader Attribute Map for more details.

Auto-Assign Groups By Email Rules (SSO Edition)

Last Modified on 07/24/2024 4:05 pm EDT

You might want to automatically assign reader groups based on a readers' email address. For example, we might want to assign all readers with "@knowledgeowl.com" email addresses to a special Owls Only reader group. If we're using SSO, we can do this using Custom Attribute Map Rules under **Settings > SSO**.



There is also an option under **Your Account > Readers > Groups** for "Auto-Assign Groups By Email Rules". This does not work with SSO. If you are using SSO, follow the instructions below to set this up using Custom Attribute Map Rules.

Prerequisites:

- SSO is set up and working
- Email address is being passed over
- IdP attribute name for the email address field

To set up a Custom Attribute Map Rule to automatically assign readers to groups based on an email address:

1. Go to **Settings > SSO**.
2. Select the **SAML Attribute Map** tab.
3. Copy the IdP attribute name for **Username / Email** under **Direct Reader Attribute Map.**
    - You will need the IdP attribute name for the email address field. If you are already mapping the email address to a field such as **Username / Email**, this IdP attribute name will be listed in the **Direct Reader Attribute Map**. If you are not sure, you can enable debug mode in order to log in via SSO and view the IdP attribute names being passed over from your IdP.
4. Scroll down to **Custom Attribute Map Rules**.
5. Select **+ Create New Rule**.
6. Enter the **IdP attribute name** that includes the email address.
7. In the **IdP attribute value matching type** section, select **Regex pattern**.
8. Copy the code below and paste it into the **IdP value regex pattern**:

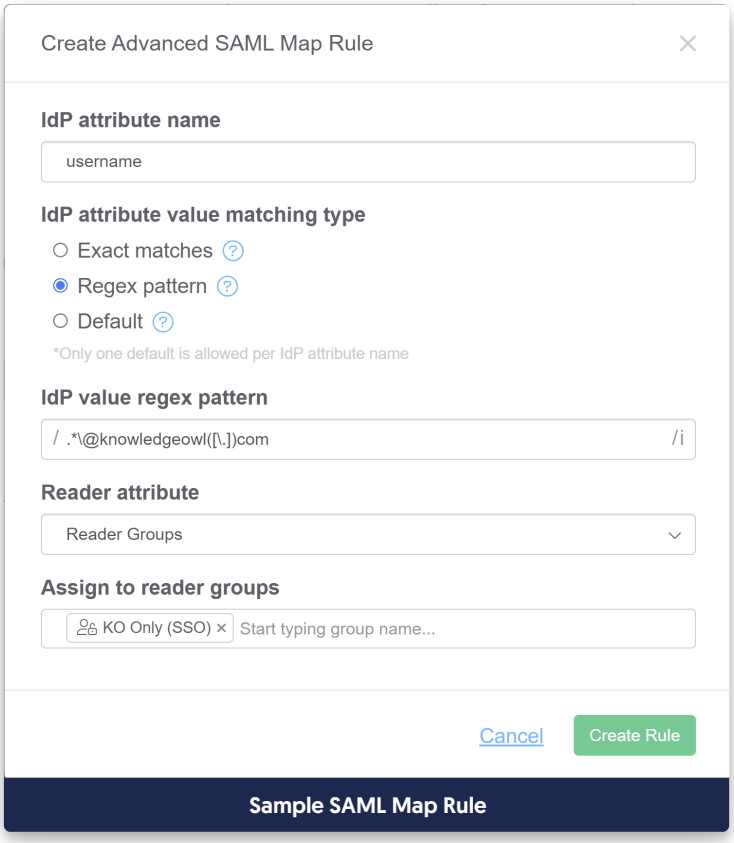
```
/.*\@knowledgeowl([\.])com
```

9. **Replace knowledgeowl with your email domain (and com with your domain ending, if it's not a .com!). So, for example, if our email domain was owlmazing.net, we would use:**

```
/.*\@owlmazing([\.])net
```

10. **Select Reader Groups from the Reader attribute dropdown.**

11. **Start typing to select the reader group(s) to which you want to assign any SSO readers with matching email addresses. Your pop-up should look something like this:**



12. **Once you've finished adding groups and verified that all information is correct, select the Create Rule button.**

13. **Now any readers who log in with matching email addresses should be automatically assigned to the selected reader group(s).**

Remote Authentication Overview

Last Modified on 05/29/2024 5:28 pm EDT

Here's how remote authentication works:

- A reader tries to access your knowledge base.
- If they are not already authenticated, the reader is redirected to your specified remote authentication landing page URL.
- Your landing page authenticates the reader in your system.
- After authentication by your system, an API call is made to KnowledgeOwl's remote authentication token request endpoint. If you are utilizing readers and reader groups, that information is passed during this token request.
- Once the login token is received by your system, the reader is redirected to the KnowledgeOwl remote authentication endpoint with this single use token which completes the handshake and the reader gains access.

Prerequisites

Last Modified on 05/29/2024 5:28 pm EDT

Before you enable remote authentication, you'll need three things:

- Appropriate permissions
- The URLs for login/logout of your remote authentication system
- An API key

Appropriate permission

You'll need to be logged in as an author who has one of these two permissions:

- The default Editor role
- A custom author role with the Update security settings permission

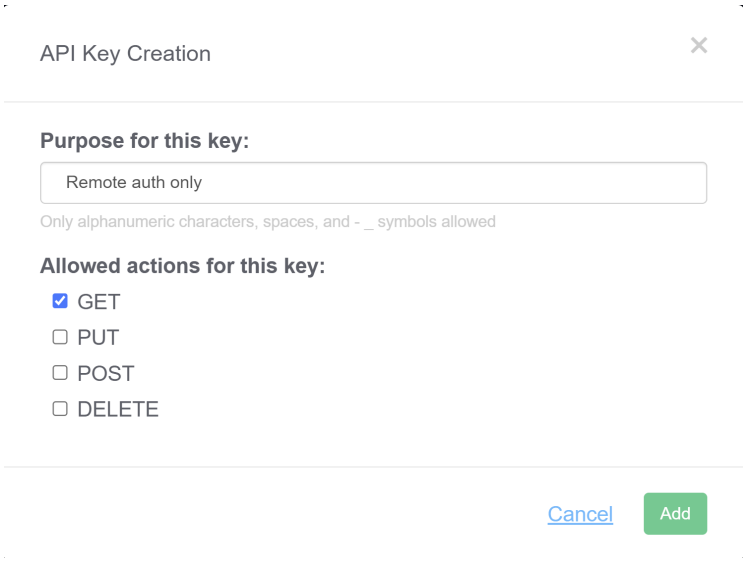
Remote authentication URLs

You will need to know:

- The login URL for your remote authentication: the URL a reader should visit to enter their credentials
- The logout URL for your remote authentication: the URL a reader should be directed to once they've logged out

API Key

You will also need an API key with GET permissions. Something like this will work:



See API keys for full steps on creating a new API key.

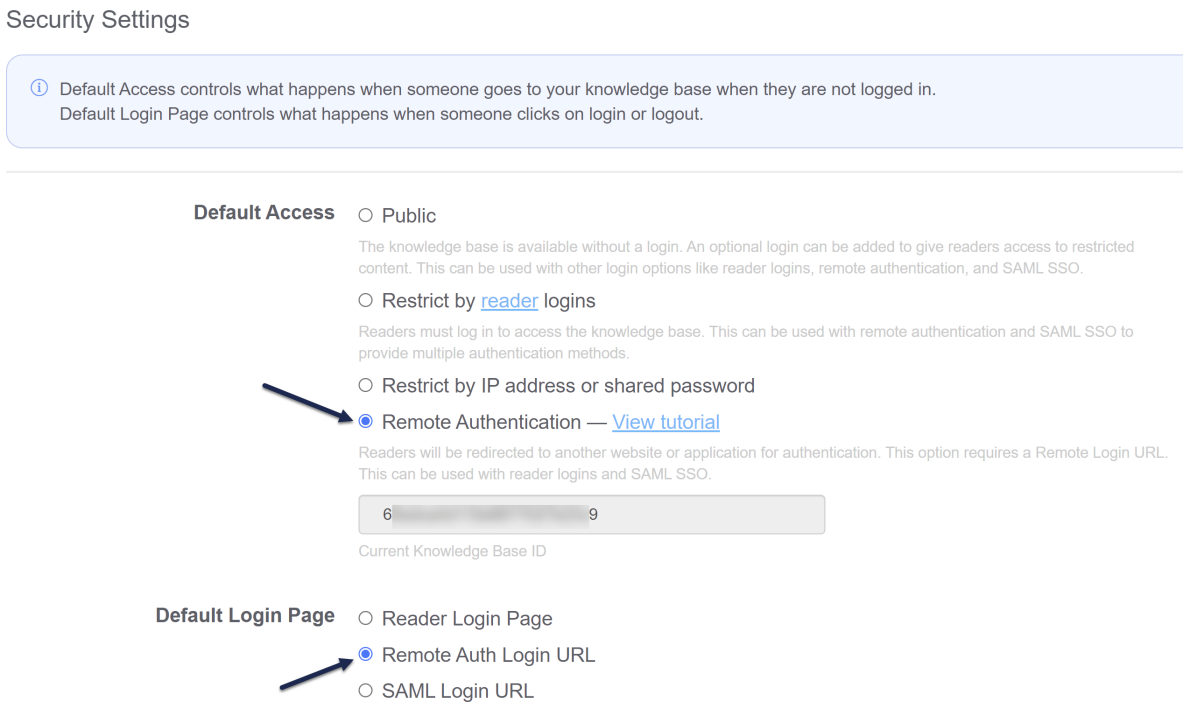
We recommend creating a new API key restricted to GET calls for this type of authentication, and using this key only for this authentication.

Enable remote authentication

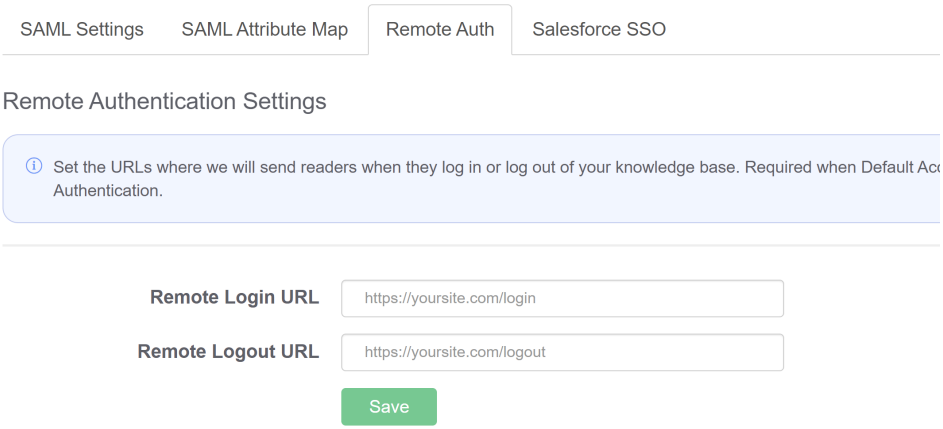
Last Modified on 05/29/2024 5:28 pm EDT

Before you can set up the full authentication process, you'll need to enable remote authentication. To do so:

1. **Go to Settings > Security.**
2. **In the Update security settings Default Access section, select Remote Authentication. Your knowledge base ID will automatically appear in the field that appears below it once you make your selection.**
3. **If it won't disrupt current login processes, we also recommend setting the Default Login Page to Remote Auth Login URL.**



4. **Save your changes.**
5. **Now go to Settings > SSO.**
6. **Open the Remote Auth tab.**
7. **Add the URL that readers should be directed to to login to your remote authentication system into the Remote Login URL field.**
8. **Add the URL that readers should be directed to once they've logged out of your knowledge base into the Remote Logout URL field.**



9. **Save** your changes.

Create your remote auth token request and script

Last Modified on 05/29/2024 5:28 pm EDT

With remote authentication enabled, you now need to configure the calls and script to request access tokens and authenticate your readers.

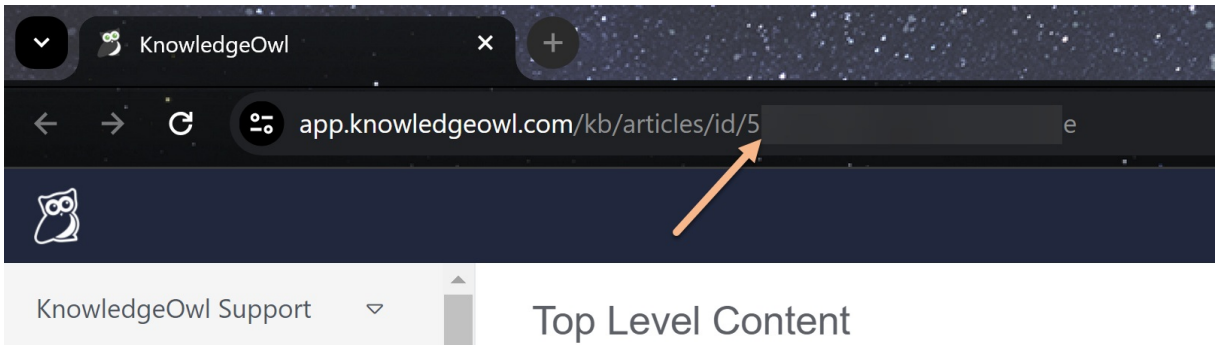
Step 1: Request Token

First, you'll need to hit the KnowledgeOwl API remotelogin endpoint to request a token. Use the API key you generated previously to make this call. At minimum, you must pass in the knowledge base's project ID and the reader's username.

Many API calls require that you pass in a knowledge base ID (usually called a project_id in the API documentation).

To find your knowledge base ID:

1. Go to **Knowledge Base > Articles.**
2. Your knowledge base/project ID is in the URL on this page, the string of letters and numbers that appears after `/articles/id/` :



Here are the details on the API endpoint:

https://app.knowledgeowl.com/api/head/remotelogin.json

Parameters	Example	Required?
project_id	project_id=123a123456789b1234aab1cde	True
reader[username]	reader[username]=support@knowledgeowl.com	True

Parameters	Example	Required?
reader[ssoid]	reader[ssoid]=12345	False, defaults to username if not specified
reader[groups]	reader[groups]=Internal,Admin	False
reader[first_name]	reader[first_name]=KnowledgeOwl	False
reader[last_name]	reader[last_name]=Support	False
reader[custom1]	reader[custom1]=Red	False
reader[custom2]	reader[custom2]=Orange	False
reader[custom3]	reader[custom3]=Yellow	False
reader[custom4]	reader[custom4]=Green	False
reader[custom5]	reader[custom5]=Blue	False

Step 2: Authenticate

You'll need to use the token generated in Step 1 to authenticate your reader. This endpoint is specific to your knowledge base's URL:



https://support.knowledgeowl.com/help/remote-auth*

***Replace "support.knowledgeowl.com" with your KO site URL. For example, if my KO site URL is "myawesomekb.knowledgeowl.com", I would use** `https://myawesomekb.knowledgeowl.com/help/remote-auth`

If you're unsure of your KO site URL, you can view it in Settings > Basic.

Parameters	Example	Required?
n (token received in step 1)	n=1234567890	True
r (redirect)	r=/help/contact-us	False, will redirect to the homepage if not specified

Example cURL Access Token Request

Here is an example cURL Access Token Request:

```
//basic authentication without reader information
curl -G -X GET -u {API KEY}:X https://app.knowledgeowl.com/api/head/remotelogin.json -d 'project={Knowledge Base ID}'

//authentication with reader information passed
curl -G -X GET -u {API KEY}:X https://app.knowledgeowl.com/api/head/remotelogin.json -d 'project={Knowledge Base ID}&reader[ssoid]={Unique Reader ID}&reader[username]={Reader Email or Name}'

//example response
{"valid":true,"data":[{"status":"success","token":"12345678"}]}
```

Reader fields can be found in our API endpoint reference.

Example PHP Script to Run After Authentication

Here is an example PHP script to run after authentication:

```
function remoteAuth()
{
   //shared vars
   /* if a non logged in user attempts to go directly to an article,
      our system will redirect them back to your landing page with the
      URL variable "r" that equals the original request URI. After
      authentication in your system, use this variable to send them
      to the originally requested page. */
   //grab the value of r
   $redirect  = $this->_request->getParam('r'); //original request uri
   $callurl  = "https://app.knowledgeowl.com/api/head/remotelogin.json"; //KnowledgeOwl auth endpoint
   $data  = array(
               'project' => '{KB ID}', //knowledge base ID
            );

   //optional data for creating / asserting reader object
   $data['reader'] = array(
                  'ssoid' => {READER UNIQUE ID} //optional, if not passed in username will be used as ssoid
                  'username' => {READER EMAIL OR NAME}, //required
                  //'groups' => {KNOWLEDGEOWL GROUP NAMES}, //optional - comma separated list ie - "Group1,Group2"
                  //'first_name' => {READER FIRST NAME}, //optional
                  //'last_name' => {READER LAST NAME}, //optional
                  //'custom1' => {STRING}, //optional
                  //'custom2' => {STRING}, //optional
                  //'custom3' => {STRING}, //optional
                  //'custom4' => {STRING}, //optional
                  //'custom5' => {STRING}, //optional
               );

   //set curl options
   $ch = curl_init();
   curl_setopt($ch, CURLOPT_URL, $callurl);
   curl_setopt($ch, CURLOPT_USERPWD,'{API Key}':X);
   curl_setopt($ch, CURLOPT_RETURNTRANSFER, 1);
   curl_setopt($ch, CURLOPT_FOLLOWLOCATION,1);
   curl_setopt($ch, CURLOPT_VERBOSE, 0);
   curl_setopt($ch, CURLOPT_POST, 1);
   curl_setopt($ch, CURLOPT_POSTFIELDS, http_build_query($data));
   curl_setopt($ch, CURLOPT_NOPROGRESS, 1);
   curl_setopt($ch, CURLOPT_TIMEOUT, 30);

   $buffer = curl_exec($ch);

   //verify return
   if(curl_errno($ch))
   {
      //handle curl errors
      print_r("Error: " . curl_error($ch));
   }
   else
   {
      //decode and verify
      $data = json_decode($buffer);
      curl_close($ch);

      //validate response
```

```
        if($data->valid && $data->data[0]->status == 'success')
        {
            //grab the token and redirect
            $token = $data->data[0]->token;

            $authData = array(
                        'n' => $token,
                        'r' => $redirect
            );

            header("Location: {Your KO Site URL}/help/remote-auth?" . http_build_query($authData));
            exit();
        }
        else
        {
            //handle api errors
        }
    }
}
```

Example vb.net logic to get the token and open the default web browser passing the auth token

This example uses the NewtonSoft package in dot net to deserialize the JSON response. It was installed in Visual Studio using NuGet.

```
Imports System.Net
Imports Newtonsoft.Json

Private Sub GoToHelp()

        Dim request As HttpWebRequest
        Dim response As HttpWebResponse
        Dim strAUTH As String = "123abcd123:X"   ‘ replace 123abcd123 with your API key
        Dim strKBProjectKey As String = "99999"  ‘ replace 99999 with actual value
        Dim strDomainUsername As String = ""

‘Reader Groups to assign (optional)
        Dim strGroups As String = "Group 1,Group 2"

        strDomainUsername = Environment.UserDomainName & "\" & Environment.UserName

        If strDomainUsername <> "" Then
            request = DirectCast(HttpWebRequest.Create("https://app.knowledgeowl.com/api/head/remotelogin.json?project
    strDomainUsername & "&reader[username]=" & strDomainUsername & "&reader[groups]=" & strGroups & "&reader

            request.Method = "GET"
            request.ContentType = "application/json; charset=utf-8"
            request.Headers.Add("Authorization", "Basic " & Convert.ToBase64String(System.Text.Encoding.UTF8.GetBytes(

            response = DirectCast(request.GetResponse, HttpWebResponse)

            Dim myreader As New IO.StreamReader(response.GetResponseStream)
            Dim strResponse As String = myreader.ReadToEnd
            Dim strToken As String = ""

            Dim resp As AuthTokenResponseObj = JsonConvert.DeserializeObject(Of AuthTokenResponseObj)(strResponse)

            For Each atrObj As AuthData In resp.data
                strToken = atrObj.token
            Next

    myreader.Close()

    Dim strURI As String = "http://{yourknowledgeowldomain.com}/help/remote-auth?n=" & strToken
            System.Diagnostics.Process.Start(strURI)


        End If

    End Sub

    Public Class AuthTokenResponseObj

        Public Property valid As String
        Public Property data As List(Of AuthData)

    End Class

    Public Class AuthData

        Public Property status As String
        Public Property token As String

  End Class
```



If you have trouble with NewtonSoft json deserializer you can always parse the token out of the response manually i.e.; strToken = strResponse.Substring(strResponse.IndexOf("token") + 8, 8)

Javascript Example Script

```
//only need this if you do not already have jquery loaded
<script src="https://ajax.googleapis.com/ajax/libs/jquery/2.1.3/jquery.min.js"></script>
<script>
 /**
 * This example assumes that you have already authenticated
 * the end user in your system
 */

 /* if a non logged in user attempts to go directly to an article,
 our system will redirect them back to your landing page with the
 URL variable "r" that equals the original request URI. After
 authentication in your system, use this variable to send them
 to the originally requested page. */
 //grab the value of r
 var redirect = "/help"; //default homepage
 var pageURL = window.location.search.substring(1);
 var urlVariables = pageURL.split('?');
 for (var i = 0; i < urlVariables.length; i++)
 {
 var parameterName = urlVariables[i].split('=');
 if (parameterName[0] == 'r')
 {
 redirect = parameterName[1];
 }
 }

 //static vars
 var token;
 var kbEndpoint = "https://{YOUR KNOWLEDGEOWL KB URL}/help/remote-auth"; //where we will be sending them back -
 var callURL  = "https://app.knowledgeowl.com/api/head/remotelogin.jsonp"; //knowledgeowl auth endpoint
 var data   = {
 _authbykey: '{API KEY}', //KnowledgeOwl API key
 project : '{KB ID}' //knowledge base ID
 }

 //request the token and redirect to desired page
 $.ajax({
 type: 'GET',
 url: callURL,
 dataType: 'jsonp',
 data: data
 }).success(function(data) {
 //check for valid response
 if(data && data.valid === true) {
 //grab the token
 token = data.data[0].token;

 kbEndpoint += "?n=" + token;
 kbEndpoint += "&r=" + redirect;

 //optional reader object creation / assertion
 kbEndpoint += "&reader[ssoid]=" + {READER UNIQUE ID}; //optional, if no ssoid is passed username will be used
 kbEndpoint += "&reader[username]=" + {READER NAME OR EMAIL}; //required
 kbEndpoint += "&reader[icon]=" + {READER PICTURE}; //optional
```

```
kbEndpoint += "&reader[icon]=" + {READER PICTURE}; //optional
kbEndpoint += "&reader[first_name]=" + {READER FIRST NAME}; //optional
kbEndpoint += "&reader[last_name]=" + {READER LAST NAME}; //optional
kbEndpoint += "&reader[groups]=" + {KNOWLEDGEOWL GROUP NAMES}; //optional, comma seperated list
kbEndpoint += "&reader[custom1]=" + {STRING}; //optional
kbEndpoint += "&reader[custom2]=" + {STRING}; //optional
kbEndpoint += "&reader[custom3]=" + {STRING}; //optional
kbEndpoint += "&reader[custom4]=" + {STRING}; //optional
kbEndpoint += "&reader[custom5]=" + {STRING}; //optional

//redirect user back with the aquired token and initial page request URI
window.location.replace(kbEndpoint);
} else {
//handle empty return error
}
}).error(function(data){
//handle ajax errors
});
</script>
```

Salesforce configuration intro

Last Modified on 05/29/2024 5:28 pm EDT

Salesforce SSO will restrict access to your knowledge base to only individuals with a valid login to your Salesforce account. Readers logged in to Salesforce will be able to access your knowledge base, and anyone who tries to access your knowledge base that is not logged into Salesforce will be redirected to Salesforce to log in.



Salesforce SSO will override any other Default Access security settings such as IP address, shared password, and readers.

You will likely need Admin privileges in Salesforce to complete all the steps below.

Step 1: Enable Salesforce SSO in KnowledgeOwl

Last Modified on 08/07/2024 1:11 pm EDT

First, we need to enable Salesforce SSO in KnowledgeOwl and add the Salesforce Login URL.

1. In KnowledgeOwl, go to **Settings > SSO**.
2. Click on the **Salesforce SSO** tab near the top.
3. Check the box next to **Enable Salesforce**.
4. In Salesforce, copy the base URL for your account. On older accounts, this will look something like https://na17.salesforce.com. In newer or branded accounts, it will look like https://knowledgeowl.my.salesforce.com.
5. In KnowledgeOwl, paste your Salesforce URL in the field called **SF login URL** and add "**/apex/ko_login**" to the end. In the end, the entire URL will look similar to `https://na17.salesforce.com/apex/ko_login`.



6. **Save** those settings in KnowledgeOwl.

Step 2: Create LoginController apex class in Salesforce

Last Modified on 08/07/2024 1:18 pm EDT

Now we'll begin setting up the Salesforce components. For all Salesforce steps, you'll need to be in the **Setup** portion of Salesforce.

1. In Salesforce, go to **Setup > Custom Code > Apex Classes.**
2. Create a new apex class.

> **No Apex Class option**
> If you don't see the option to create a new apex class, you'll likely need to perform the following steps in your sandbox environment before deploying to your production instance.

3. Copy and paste the following code into the new apex class:

```
public class KnowledgeOwlLoginController {
    public string md5String {get;set;}
    public string timeStamp {get;set;}
    public string redirect {get;set;}
    private User activeUser;
    private string koToken = '<YOUR_KO_REMOTE_AUTH_TOKEN>';

    public KnowledgeOwlLoginController () {
        String userName = UserInfo.getUserName();
        activeUser = [Select Email From User where Username = : userName limit 1];
        timeStamp = String.valueof(DateTime.now().getTime() / 1000);
        redirect = ApexPages.CurrentPage().getParameters().get('r');
        String hash = UserInfo.getUserId() + this.koToken + timeStamp;
        Blob keyblob = Blob.valueof(hash);
        Blob key = Crypto.generateDigest('MD5',keyblob);
        md5String = encodingUtil.convertToHex(key);

        UpsertReader();
    }

    //create or update the reader information in KnowledgeOwl
    public HttpResponse UpsertReader() {
        //replace static value with user specific field to pass through desired reader groups
        String reader_groups = '<SF Group1,SF Group2>';

        HttpRequest req = new HttpRequest();
        HttpResponse res = new HttpResponse();
        Http http = new Http();

        //post reader information to KnowledgeOwl
        req.setEndpoint('https://<YOUR_KO_URL>/sf-reader-create');
        req.setMethod('POST');
        req.setBody('timestamp='+timeStamp+'&hash='+md5String+'&ssoid='+UserInfo.getUserId()+'&username=
        req.setHeader('Content-Type', 'application/x-www-form-urlencoded');
        req.setCompressed(false);

        res = http.send(req);
        return res;
    }
}
```

4. **Replace `<YOUR_KO_REMOTE_AUTH_TOKEN>` in row 6 with your KnowledgeOwl token found under Settings > SSO > Salesforce SSO > KO Auth Token.**

5. **Replace `<SF Group1,SF Group2>` in row 24 with either a comma-separated list of groups you'd like to add your reader to or a field that stores that information.**

6. **Replace `<YOUR_KO_URL>` in row 31 with the URL of your knowledge base's homepage. Our domain is `support.knowledgeowl.com/help` so that's what we would use, for example:**

```
        //post reader information to KnowledgeOwl
        req.setEndpoint('https://support.knowledgeowl.com/help/sf-reader-create');
        req.setMethod('POST');
        req.setBody('timestamp='+timeStamp+'&hash='+md5String+'&ssoid='+UserInfo.getUserId()+'&username=
        req.setHeader('Content-Type', 'application/x-www-form-urlencoded');
        req.setCompressed(false);

        res = http.send(req);
        return res;
    }
}
```

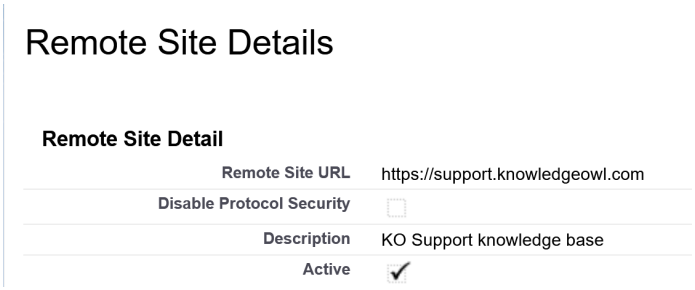
7. **Once you're done updating those fields, Save the apex class in Salesforce.**

Step 3: Add the Remote Site in Salesforce

Last Modified on 07/10/2024 4:39 pm EDT

Next, we need to add the knowledge base URL as an allowed Remote Site in Salesforce. To do so:

1. In Salesforce, navigate to **Setup > Security > Remote Site Settings.**
2. Click on **New Remote Site**.
3. For the URL, use your knowledge base's homepage URL with the /help, /home, or /docs removed. So for our site, we'd use `https://support.knowledgeowl.com` :



4. Be sure to **save** your changes.

Step 4: Create a Visualforce page in Salesforce

Last Modified on 08/07/2024 1:25 pm EDT

For this step, you'll need to find your **Develop > Pages** settings in Salesforce.

Depending on your account, this may be in several places:

- **Setup > Custom Code > Visualforce Pages**
- **Setup > Build > Develop > Pages**
- **General Account Settings > App Setup > Develop > Pages** (only for much older accounts)

Once you've found this option:

1. Create a new Visualforce page.
2. Enter any **Label** you'd like.
3. Enter `ko_login` as the **Name**. You must enter this value for the integration to work!
4. Copy the code below and paste it into the **Visualforce Markup** section:

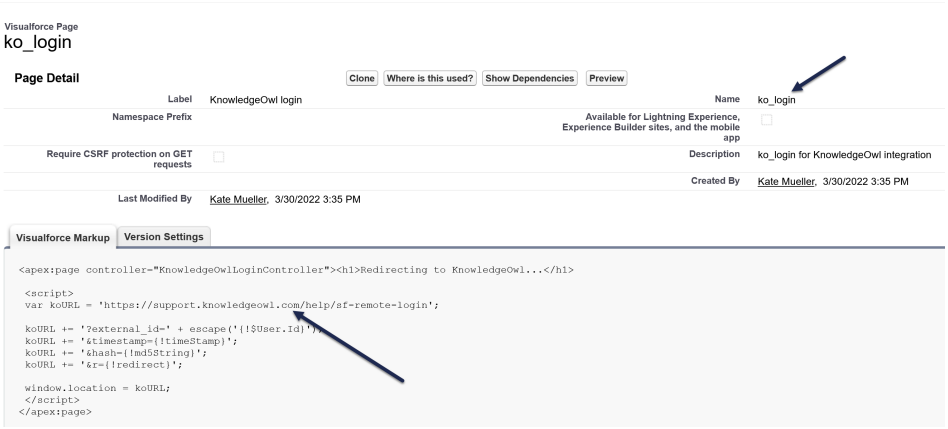
```
<apex:page controller="KnowledgeOwlLoginController"><h1>Redirecting to KnowledgeOwl...</h1>

 <script>
var koURL = 'https://<YOUR_KO_DOMAIN>/sf-remote-login';

koURL += '?external_id=' + escape('{!$User.Id}');
koURL += '&timestamp={!timeStamp}';
koURL += '&hash={!md5String}';
koURL += '&r={!redirect}';

window.location = koURL;
</script>
</apex:page>
```

5. Replace `<YOUR_KO_DOMAIN>` in row 4 with your KnowledgeOwl knowledge base homepage. Our homepage is `https://support.knowledgeowl.com/help` so we'd use `support.knowledgeowl.com/help`:



6. **Save.**

Once you've created the Visualforce page, open the **Security** settings for the Visualforce page you just created.

Navigate back to the menu option you used to open Pages above--if you're using **Setup > Custom Code > Visualforce Pages** the Security link will appear to the left of the Visualforce page name when you're viewing the list of pages.

1. Open the **Security** settings for the Visualforce page you just created.
2. Add the user profiles you wish to be able to use this integration. This will depend on your Salesforce configuration.
3. **Save** those changes.

Step 5: Create final apex classes in Salesforce

Last Modified on 08/07/2024 1:25 pm EDT

Now, you can create the final two apex classes needed for the integration. To do so:

1. Navigate back to **Setup > Custom Code > Apex Classes.**
2. Create another new Apex class.
3. Copy the code below, paste it into the apex class body, and **Save** the new class.

```
@isTest
global class MockHttpResponseGenerator implements HttpCalloutMock {
    // Implement this interface method
    global HTTPResponse respond(HTTPRequest req) {
        // Create a fake response
        HttpResponse res = new HttpResponse();
        res.setHeader('Content-Type', 'application/json');
        res.setBody('{"foo":"bar"}');
        res.setStatusCode(200);
        return res;
    }
}
```

4. Finally, create one more new Apex class. Copy the code below, paste it into the body, and **Save** the new class

```
@isTest
private class KnowledgeOwlLoginTest {
    static testMethod void loginVarsTest() {
        //Set mock callout class
        Test.setMock(HttpCalloutMock.class, new MockHttpResponseGenerator());

        //instantiate the controller
        KnowledgeOwlLoginController controller = new KnowledgeOwlLoginController();

        // Call method to test.
        HttpResponse res = controller.UpsertReader();

        // Verify response received contains fake values
        String contentType = res.getHeader('Content-Type');
        System.assert(contentType == 'application/json');
        String actualValue = res.getBody();
        String expectedValue = '{"foo":"bar"}';
        System.assertEquals(actualValue, expectedValue);
        System.assertEquals(200, res.getStatusCode());
    }
}
```

5. Once you have saved that class, select **Run Test** to ensure that your new Apex classes have full code coverage and are ready to deploy to your production environment.

6. Test it out! When a reader tries to access your knowledge base, they must be logged in to your Salesforce account. If they are not, they will be redirected to Salesforce to log in and redirected back to your knowledge base once they are authenticated.

Cookie declaration

Last Modified on 05/29/2024 5:27 pm EDT



Privacy policy

Last Modified on 07/29/2024 2:22 pm EDT



Your privacy is important to us. At KnowledgeOwl, we have a few fundamental principles:

- We are thoughtful about the personal information we ask you to provide and the personal information that we collect about you through the operation of our services.
- We store personal information for only as long as we have a reason to keep it.
- We aim to make it as simple as possible for you to control what information on your website is shared publicly (or kept private), indexed by search engines, and permanently deleted.
- We aim for full transparency on how we gather, use, and share your personal information.

Below is KnowledgeOwl's privacy policy, which incorporates and clarifies these principles.

Who We Are

We are the folks behind KnowledgeOwl, an online knowledge base software tool. For the purposes of the GDPR, we are both a data controller and a data processor.

What This Policy Covers

This Privacy Policy applies to information that we collect about you when you use:

- Our websites (including https://www.knowledgeowl.com and https://support.knowledgeowl.com);
- Our application (https://app.knowledgeowl.com); and
- Other products and services that are available on or through our websites and application (including our widget, API, and various integrations like the Zendesk app).

Throughout this Privacy Policy we'll refer to our websites, application, and other products and services collectively as "Services." Below we explain how we collect, use, and share information about you, along with the choices that you have with respect to that information.

Information We Collect

We only collect information about you if we have a reason to do so—for example, to provide our Services, to communicate with you, or to make our Services better. We collect information in three ways: if and when you provide information to us, automatically through operating our services, and from outside sources.

Information You Provide to Us

It's probably no surprise that we collect information that you provide to us. The amount and type of information depends on the context and how we use the information. Here are some examples:

- **Basic Account Information:** We ask for basic information from you in order to set up your account. For example, we require individuals who sign up for a KnowledgeOwl account to provide a first name, a last name, and email address. You may provide us with more information–like your company name and billing address–but we don't require that information to create your account.
- **Transaction and Billing Information:** If you purchase something from us–a subscription to a KnowledgeOwl plan or a custom domain, for example–you will provide additional personal and payment information that is required to process the transaction and your payment, such as your name, credit card information, and contact information.
- **Content Information:** When using KnowledgeOwl, you may also provide us with information about you in the content for your knowledge base. For example, if you write an article that includes biographic information about you, we will have that information, and so will anyone with access to your knowledge base.
- **Credentials:** Depending on the Services you use, you may provide us with credentials for third-party services which you want to integrate with KnowledgeOwl For example, you might provide us with your Zendesk username, domain, and API key to set up a contact form integration.
- **Communications with Us:** You may also provide us information when you respond to emails, communicate with our support team, or post a comment on our knowledge base.

Information We Collect Automatically

We also collect some information automatically:

- **Log Information:** Like most online service providers, we collect information that web browsers, mobile devices, and servers typically make available, such as the browser type, IP address, unique device identifiers, language preference, referring site, the date and time of access, operating system, and mobile network information. We collect log information when you use our Services–for example, when you create or make changes to your knowledge base.
- **Usage Information:** We collect information about your usage of our Services. For example, we collect information about the actions that site administrators and users perform on a site–in other words, who did what, when and to what thing on a site. We also collect information about what happens when you use our Services (e.g., page views, support document searches, button clicks) along with information about your device (e.g., screen size, operating system, browser). We use this information to, for example, provide our Services to you, as well as get insights on how people use our Services, so we can make our Services better.
- **Location Information:** We may determine the approximate location of your device from your IP address. We collect and use this information to, for example, calculate how many people visit our Services from certain geographic regions.
- **Information from Cookies & Other Technologies:** A cookie is a string of information that a website stores on a visitor's computer, and that the visitor's browser provides to the website each time the visitor returns. Pixel tags (also called web beacons) are small blocks of code placed on websites and e-mails. KnowledgeOwl uses cookies and other technologies like pixel tags to help us identify and track visitors, usage, and access preferences for our Services, as well as track and understand marketing campaign effectiveness.

Information We Collect from Other Sources

We may also get information about you from other sources. For example, if you log into your KnowledgeOwl

account using SSO from a third-party identity provider, we will receive information from that service (such as your username/email, first name, and email) via the authorization procedures used by that service. The information we receive depends on which services you authorize and integrate with your KnowledgeOwl account.

How We Use Information

We use information about you as mentioned above and as follows:

- To provide our Services—for example, to set up and maintain your account or charge you for any of our paid Services;
- To further develop our Services—for example by adding new features that we think our users will enjoy or will help them to create and manage their knowledge bases more efficiently;
- To monitor and analyze trends and better understand how users interact with our Services, which helps us improve our Services and make them easier to use;
- To monitor and protect the security of our Services, detect and prevent fraudulent transactions and other illegal activities, fight spam, and protect the rights and property of KnowledgeOwl and others;
- To communicate with you about KnowledgeOwl services and others we think will be of interest to you, solicit your feedback, or keep you up to date on KnowledgeOwl and our products; and
- To personalize your experience using our Services and provide recommendations.

Sharing Information

How We Share Information

We do not sell our users' private personal information. We share information about you in the limited circumstances spelled out below and with appropriate safeguards on your privacy:

- **Subsidiaries, Employees, and Independent Contractors:** We may disclose information about you to our subsidiaries, our employees, and individuals who are our independent contractors that need to know the information in order to help us provide our Services or to process the information on our behalf. We require our subsidiaries, employees, and independent contractors to follow this Privacy Policy for personal information that we share with them.
- **Third Party Vendors:** We may share information about you with third party vendors who need to know information about you in order to provide their services to us. This group includes vendors that help us provide our Services to you (like payment providers that process your credit and debit card information) and those that help us understand and enhance our Services (like analytics providers). We require vendors to agree to privacy commitments in order to share information with them.
- **As Required by Law:** We may disclose information about you in response to a subpoena, court order, or other governmental request.
- **To Protect Rights and Property:** We may disclose information about you when we believe in good faith that disclosure is reasonably necessary to protect the property or rights of KnowledgeOwl, third parties, or the public at large. For example, if we have a good faith belief that there is an imminent danger of death or serious physical injury, we may disclose information related to the emergency without delay.
- **Business Transfers:** In connection with any merger, sale of company assets, or acquisition of all or a portion of our business by another company, or in the unlikely event that KnowledgeOwl goes out of business or enters bankruptcy, user information would likely be one of the assets that is transferred or acquired by a third party. If any of these events were to happen, this Privacy Policy would continue to apply to your information and the party receiving your information may continue to use your information, but only consistent with this Privacy Policy.
- **With Your Consent:** We may share and disclose information with your consent or at your direction. For

example, we may share your information with third parties with which you authorize us to do so, such as setting up integrations with ticketing systems or analytics tools.

- **Aggregated and De-Identified Information:** We may share information that has been aggregated or reasonably de-identified, so that the information could not reasonably be used to identify you. For instance, we may publish aggregate statistics about the use of our Services.
- **Knowledge Base Users:** If you leave a comment or use the contact form on a website that uses our Services (like a knowledge base created in KnowledgeOwl), the information you provide - like your email address and name - may be shared with the users of the site where you left the comment.
- **Published Support Requests:** And if you send us a request (for example, via a support email or one of our feedback mechanisms), we reserve the right to publish that request in order to help us clarify or respond to your request or to help us support other users. Your personal information, such as you name or email, will not be shared to protect your privacy.

Information Shared Publicly

Information that you choose to make public is—you guessed it—disclosed publicly. That means that information like your comments or articles that you make public on your knowledge base are all available to others. Public information may also be indexed by search engines or used by third parties. Please keep all of this in mind when deciding what you would like to share.

Choices

You have several choices available when it comes to information about you:

- **Limit the Information that You Provide:** If you have an account with us, you can choose not to provide the optional account information, profile information, and transaction and billing information. Please keep in mind that if you do not provide this information, certain features of our Services may not be accessible.
- **Set Your Browser to Reject Cookies:** You can usually choose to set your browser to, or use a tool that will, remove or reject browser cookies before using KnowledgeOwl services, with the drawback that certain features of KnowledgeOwl services may not function properly without the aid of cookies.

Other Things You Should Know

Questions

If you have question about this Privacy Policy, please contact us at support@knowledgeowl.com.

Security

While no online service is 100% secure, we work very hard to protect information about you against unauthorized access, use, alteration, or destruction, and take reasonable measures to do so. To enhance the security of your account, we encourage you to enable our advanced security settings, like Force SSL Links and Single Sign-On.

EU-U.S. Data Privacy Framework

KnowledgeOwl complies with the EU-U.S. Data Privacy Framework (EU-U.S. DPF), the UK Extension to the EU-U.S. DPF, and the Swiss-U.S. Data Privacy Framework (Swiss-U.S. DPF) as set forth by the U.S. Department of Commerce regarding the collection, use, and retention of personal information transferred from the European Union, United Kingdom, and Switzerland to the United States. KnowledgeOwl has certified to the Department

of Commerce that it adheres to the EU-U.S. Data Privacy Framework Principles (EU-U.S. DPF Principles) with regard to the processing of personal data received from the European Union in reliance on the EU-U.S. DPF and from the United Kingdom in reliance on the UK Extension to the EU-U.S. DPF. KnowledgeOwl has also certified to the U.S. Department of Commerce that it adheres to the Swiss-U.S. Data Privacy Framework Principles (Swiss-U.S. DPF Principles) with regard to the processing of personal data received from Switzerland in reliance on the Swiss-U.S. DPF. If there is any conflict between the terms in this Data Privacy Framework Policy and the EU-U.S. DPF Principles and/or the Swiss-U.S. DPF Principles, the Principles shall govern.

KnowledgeOwl is subject to the investigatory and enforcement powers of the Federal Trade Commission (FTC). We may be required to disclose personal information that we handle under the Data Privacy Framework in response to lawful requests by public authorities, including to meet national security or law enforcement requirements.

To learn more about the Data Privacy Framework, and to view our certification, please visit https://www.dataprivacyframework.gov.

Contact us at any time to request access to, edit, or delete your personal information.

Silly Moose, LLC dba KnowledgeOwl
4845 Pearl East Cir Ste 118
PMB 30558
Boulder, CO 80301
compliance@knowledgeowl.com

In compliance with the EU-U.S. DPF and the UK Extension to the EU-U.S. DPF and the Swiss-U.S. DPF, KnowledgeOwl commits to cooperate and comply respectively with the advice of the panel established by the EU data protection authorities (DPAs) and the UK Information Commissioner's Office (ICO) and the Swiss Federal Data Protection and Information Commissioner (FDPIC) with regard to unresolved complaints concerning our handling of personal data received in reliance on the EU-U.S. DPF and the UK Extension to the EU-U.S. DPF and the Swiss-U.S. DPF.

Under certain conditions, more fully described on the Data Privacy Framework website, you may invoke binding arbitration when other dispute resolution procedures have been exhausted.

We previously complied with the requirements of the EU-US Privacy Shield Framework in relation to our processing of personal data.

Onward Transfer of Information

KnowledgeOwl is a service available worldwide. By accessing or using the Services or otherwise providing information to us, you consent to the processing, transfer, and storage of information in and to the United States of America. KnowledgeOwl also relies on certain sub-processors in order to support the services we provide. An up-to-date list of our sub-processors can be found here:

https://support.knowledgeowl.com/help/list-of-sub-processors

KnowledgeOwl reviews any sub-processors that we use to ensure that they provide the same level (or greater) of privacy protections that we do. We further ensure that any information processed by these sub-processors is done in a manner that is consistent with our own standards, and the standards we comply with as part of the EU-U.S. DPF. KnowledgeOwl only transfers data to sub-processors that is strictly necessary for the specified purpose of the sub-processor.

In the event that we become aware that a sub-processor no longer provides the same privacy standards that we are obligated to uphold or that they are processing data in a manner inconsistent with our privacy agreements, we will take measures to cease any current or planned data transfers, and will work to remediate any unauthorized processing that may have occurred.

Third Party Software

If you'd like to use third party software like plugins with our Services, please keep in mind that when you interact with them you may provide information about yourself to those third parties. We don't own or control these third parties and they have their own rules about collection, use and sharing of information. You should review their rules and policies when installing and using third party software.

Our Users' Knowledge Bases

If you are a visitor to one of our customers' knowledge bases, please note that this privacy policy doesn't apply to you in regard to that specific site. We process information that visitors provide to our users' websites on behalf of our users and in accordance with our user agreements. We encourage our users to post a privacy policy that accurately describes their practices on data collection, use, and sharing of personal information.

Reuse

This document is based upon the Automattic Privacy Policy, which can be found on Github, and is licensed under the Creative Commons Attribution-ShareAlike 4.0 International license. This means you can use it verbatim or edited, but you must release new versions under the same license and you have to credit Automattic and KnowledgeOwl somewhere. Automattic is not connected with nor sponsors or endorses KnowledgeOwl or its use of the work.

Privacy Policy Changes

Although most changes are likely to be minor, KnowledgeOwl may change its Privacy Policy from time to time. If we make changes, we will notify you by revising the change log below, and, in some cases, we may provide additional notice (such as adding a statement to our homepage or sending you a notification through e-mail or your dashboard). Your continued use of the Services after any change in this Privacy Policy will constitute your consent to such change.

July 29, 2024: Updated DPF language to reflect our commitment to cooperate with EU, UI, and Swiss data authorities as part of our DPF certification. Included additional language to ensure compliance with DPF principles around accountability of onward transfer of data.

March 27, 2024: Updated contact information to reflect our new compliance email and added language about the UK extension.

October 20, 2023: Updated EU-U.S. Data Privacy Framework to comply with updates to the program.

March 29, 2023: Updated our contact information in the EU-US / Swiss-US Privacy Shield section to reflect our current mailing address.

May 23, 2018: Updated the policy to be GDPR-compliant by cutting out legalese and using clear language. Informed individuals about KnowledgeOwl being subject to the investigatory and enforcement powers of the Federal Trade Commission (FTC); the possibility, under certain conditions, for the individual to

invoke binding arbitration; and our liability in cases of onward transfers to third parties.

Data Processing Addendum (DPA)

Last Modified on 05/29/2024 5:28 pm EDT



Updated: April 4th, 2022

Need a signature? You can sign our DPA electronically using PandaDoc!

This Data Processing Addendum ("DPA") forms part of the terms and conditions of service found at https://www.knowledgeowl.com/home/terms-and-conditions unless the Customer has entered into a superseding agreement with KnowledgeOwl, in which case it forms part of that agreement (in either case, the "Agreement").

KnowledgeOwl agrees to comply with the following provisions with respect to any Personal Data Processed by KnowledgeOwl in connection with its provision of the Services. References to the Agreement will be construed as including this DPA and, except as modified below, the terms of the Agreement shall remain in full force and effect.

For the purpose of this DPA, Customer is the Data Controller and KnowledgeOwl is the Data Processor. Any capitalized terms not defined herein shall have the respective meanings given to them in the Agreement. In the event of any conflict between this DPA and the Agreement, this DPA will prevail.

1. DEFINITIONS

"Data Controller" means the entity that determines the purposes and means of the Processing of Personal Data.

"Data Processor" means the entity which Processes Personal Data on behalf of the Data Controller.

"Data Protection Laws" means all laws and regulations, including laws and regulations of the European Union, applicable to the Processing of Personal Data under the Agreement.

"Data Subject" means the individual to whom Personal Data relates.

"Personal Data" means any information relating to an identified or identifiable person.

"Privacy Shield" means the EU-U.S. Privacy Shield Framework and the Swiss-U.S. Privacy Shield Framework as set forth by the U.S. Department of Commerce.

“Processing” means any operation or set of operations which is performed upon Personal Data, whether or not by automatic means, such as collection, recording, organization, storage, adaptation or alteration, retrieval, consultation, use, disclosure by transmission, dissemination or otherwise making available, alignment or combination, blocking, erasure or destruction (“Process”, “Processes” and “Processed” shall have the same meaning).

“Security Breach” has the meaning set forth in Section 7 of this DPA.

“Standard Contractual Clauses” means the agreement executed by and between the. Customer and KnowledgeOwl in Schedule 1 pursuant to the European Commission’s decision (C(2010)593) of 5 February 2010 on Standard Contractual Clauses for the transfer of personal data to processors established in third countries which do not ensure an adequate level of data protection.

“Sub-processor” means any Data Processor engaged by KnowledgeOwl.

2. PROCESSING OF PERSONAL DATA

2.1 The parties agree that with regard to the Processing of Personal Data, the Customer is the Data Controller and KnowledgeOwl is the Data Processor.

2.2 KnowledgeOwl shall process Personal Data in accordance with the requirements of the Data Protection Laws and Customer will ensure that its instructions for the Processing of Personal Data shall comply with the Data Protection Laws. If KnowledgeOwl believes or becomes aware that any of Customer’s instructions conflict with any Data Protection Laws, KnowledgeOwl shall inform Customer.

2.3 During the Term of the Agreement, KnowledgeOwl shall only Process Personal Data on behalf of and in accordance with Customer’s written instructions and shall treat Personal Data as confidential information. Customer instructs KnowledgeOwl to Process Personal Data for the following purposes: (i) Processing in accordance with the Agreement and any applicable orders; and (ii) Processing to comply with other reasonable written instructions provided by Customer where such instructions are consistent with the terms of the Agreement. KnowledgeOwl may Process Personal Data other than on the written instructions of Customer if it is required under applicable law to which KnowledgeOwl is subject. In this situation, KnowledgeOwl shall inform Customer of such requirement before KnowledgeOwl Processes the Personal Data unless prohibited by applicable law. The objective of Processing of Personal Data by KnowledgeOwl is the provision of the Services pursuant to the Agreement.

2.4 Customer acknowledges and agrees that KnowledgeOwl may engage Sub-processors to provide the Services set forth in the Agreement. KnowledgeOwl agrees that any agreement with an approved Sub-processor shall include no less protective data protection obligations as set out in this DPA. KnowledgeOwl will notify the Customer of any intended change to Sub-processors, giving the Customer at least 10 business days to object in writing. KnowledgeOwl shall remain responsible for any approved Sub-processor’s compliance with the obligations of this DPA.

3. RIGHTS OF DATA SUBJECTS

3.1 To the extent Customer, in its use or receipt of the Services, does not have the ability to correct, amend, restrict, block or delete Personal Data, as required by Data Protection Laws, KnowledgeOwl shall promptly comply with reasonable requests by Customer to facilitate such actions to the extent KnowledgeOwl is legally permitted and able to do so.

3.2 KnowledgeOwl shall, to the extent legally permitted, promptly notify Customer if it receives a request from a Data Subject for access to, correction, amendment, deletion of or objection to the processing of that person’s

Personal Data. KnowledgeOwl shall not respond to any such Data Subject request without Customer's prior written consent except to confirm that the request relates to Customer. To the extent that Customer responds to any such Data Subject request, KnowledgeOwl shall provide Customer with commercially reasonable cooperation and assistance, including by implementing appropriate technical and organizational measures, in relation to the handling of a Data Subject's request, to the extent legally permitted.

4. KNOWLEDGEOWL PERSONNEL

4.1 KnowledgeOwl shall ensure that its personnel engaged in the Processing of Personal Data are informed of the confidential nature of the Personal Data, have received appropriate training on their responsibilities and are subject to obligations of confidentiality and such obligations shall survive the termination of that individual's engagement with KnowledgeOwl.

4.2 KnowledgeOwl shall ensure that access to Personal Data is limited to personnel who require such access to fulfill KnowledgeOwl's obligations under the Agreement.

5. SECURITY; AUDIT RIGHTS; PRIVACY IMPACT ASSESSMENTS

5.1 Pursuant to Article 28, Section 3(c) of the General Data Protection Regulation ("GDPR"), KnowledgeOwl shall take all measures required pursuant to Article 32 of the GDPR.

5.2 KnowledgeOwl will make available to Customer all information necessary to demonstrate compliance with the obligations laid down in Article 28 of the GDPR and allow for and contribute to audits, including inspections, conducted by Customer or another auditor mandated by Customer.

5.3 KnowledgeOwl will reasonably cooperate with Customer to assist Customer in ensuring compliance with Articles 32 to 36 of the GDPR.

6. SECURITY BREACH MANAGEMENT AND NOTIFICATION

If KnowledgeOwl becomes aware of any accidental or unlawful destruction, loss, alteration, unauthorized disclosure of, or access to any Personal Data transmitted, stored or otherwise Processed on KnowledgeOwl's equipment or in KnowledgeOwl's facilities ("Security Breach"), KnowledgeOwl will promptly: (i) notify Customer of the Security Breach; (ii) investigate the Security Breach and provide Customer with all relevant information about the Security Breach; and (iii) take all steps to mitigate the effects and to minimize any damage resulting from the Security Breach.

7. RETURN AND DELETION OF PERSONAL DATA

Upon Customer's request, KnowledgeOwl shall delete or return Personal Data to Customer and shall delete existing copies unless applicable European Union or Member State law requires storage of such data.

8. PRIVACY SHIELD

KnowledgeOwl agrees to apply the Privacy Shield Framework Principles issued by the U.S. Department of Commerce, located at https://privacyshield.gov/ ("Privacy Shield Principles") to all Personal Data that Customer transfers to KnowledgeOwl that originates from the European Economic Area or Switzerland ("EEA Data"). For clarity, KnowledgeOwl agrees to (a) use EEA Data only for purposes specified by Customer; (b) notify Customer upon KnowledgeOwl's determination that it can no longer apply the Privacy Shield Principles to EEA Data; and (c) upon such determination, cease use of EEA Data or take other reasonable and appropriate steps to apply the Privacy Shield Principles to EEA Data.

9. PARTIES TO THIS DPA

Nothing in this DPA shall confer any benefits or rights on any person or entity other than the parties to this DPA.

10. LEGAL AUTHORITY

Each of KnowledgeOwl and Customer mutually represent and warrant that (i) the person executing this DPA on its respective behalf has the legal authority to bind such party, and (ii) it has right, power, and authority to (a) enter into this DPA, (b) make the representations and warranties contained herein, and (c) commit to and perform the respective duties, obligations and covenants set forth hereunder.

Schedule 1: STANDARD CONTRACTUAL CLAUSES

Section 1

Clause 1

Purpose and Scope

1. The purpose of these standard contractual clauses is to ensure compliance with the requirements of Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data (General Data Protection Regulation) for the transfer of personal data to a third country.

2. The Parties:

    a. the natural or legal person(s), public authority/ies, agency/ies or other body/ies (hereinafter 'entity/ies') transferring the personal data, as listed in Annex I.A (hereinafter each 'data exporter'), and

    b. the entity/ies in a third country receiving the personal data from the data exporter, directly or indirectly via another entity also Party to these Clauses, as listed in Annex I.A (hereinafter each 'data importer')

3. have agreed to these standard contractual clauses (hereinafter: 'Clauses').

4. These Clauses apply with respect to the transfer of personal data as specified in Annex I.B.

5. The Appendix to these Clauses containing the Annexes referred to therein forms an integral part of these Clauses.

Clause 2

Invariability of the Clauses

1. These Clauses set out appropriate safeguards, including enforceable data subject rights and effective legal remedies, pursuant to Article 46(1) and Article 46 (2)(c) of Regulation (EU) 2016/679 and, with respect to data transfers from controllers to processors and/or processors to processors, standard contractual clauses pursuant to Article 28(7) of Regulation (EU) 2016/679, provided they are not modified, except to select the appropriate Module(s) or to add or update information in the Appendix. This does not prevent the Parties from including the standard contractual clauses laid down in these Clauses in a wider contract and/or to add other clauses or additional safeguards, provided that they do not contradict, directly or indirectly, these Clauses or prejudice the fundamental rights or freedoms of data subjects.

2. These Clauses are without prejudice to obligations to which the data exporter is subject by virtue of Regulation (EU) 2016/679.

Clause 3

Third-party Beneficiaries

1. Data subjects may invoke and enforce these Clauses, as third-party beneficiaries, against the data exporter and/or data importer, with the following exceptions:
    a. Clause 1, Clause 2, Clause 3, Clause 6, Clause 7;
    b. Clause 8.1(b), 8.9(a), (c), (d) and (e);
    c. Clause 9(a), (c), (d) and (e);
    d. Clause 12(a), (d) and (f);
    e. Clause 13;
    f. Clause 15.1(c), (d) and (e);
    g. Clause 16(e);
    h. Clause 18(a) and (b).
2. Paragraph (a) is without prejudice to rights of data subjects under Regulation (EU)2016/679.

Clause 4

Interpretation

1. Where these Clauses use terms that are defined in Regulation (EU) 2016/679, those terms shall have the same meaning as in that Regulation.
2. These Clauses shall be read and interpreted in the light of the provisions of Regulation (EU) 2016/679.
3. These Clauses shall not be interpreted in a way that conflicts with rights and obligations provided for in Regulation (EU) 2016/679.

Clause 5

Hierarchy

In the event of a contradiction between these Clauses and the provisions of related agreements between the Parties, existing at the time these Clauses are agreed or entered into thereafter, these Clauses shall prevail.

Clause 6

Description of the Transfer(s)

The details of the transfer(s), and in particular the categories of personal data that are transferred and the purpose(s) for which they are transferred, are specified in Annex I.B.

Clause 7

Docking Clause

1. An entity that is not a Party to these Clauses may, with the agreement of the Parties, accede to these Clauses at any time, either as a data exporter or as a data importer, by completing the Appendix and signing Annex I.A.

2. Once it has completed the Appendix and signed Annex I.A, the acceding entity shall become a Party to these Clauses and have the rights and obligations of a data exporter or data importer in accordance with its designation in Annex I.A.

3. The acceding entity shall have no rights or obligations arising under these Clauses from the period prior to becoming a Party.

Section 2 - Obligations of the Parties

Clause 8
Data Protection Safeguards

The data exporter warrants that it has used reasonable efforts to determine that the data importer is able, through the implementation of appropriate technical and organisational measures, to satisfy its obligations under these Clauses.

8.1 Instructions

1. The data importer shall process the personal data only on documented instructions from the data exporter. The data exporter may give such instructions throughout the duration of the contract.

2. The data importer shall immediately inform the data exporter if it is unable to follow those instructions.

8.2 Purpose limitation

The data importer shall process the personal data only for the specific purpose(s) of the transfer, as set out in Annex I.B, unless on further instructions from the data exporter.

8.3 Transparency

On request, the data exporter shall make a copy of these Clauses, including the Appendix as completed by the Parties, available to the data subject free of charge. To the extent necessary to protect business secrets or other confidential information, including the measures described in Annex II and personal data, the data exporter may redact part of the text of the Appendix tothese Clauses prior to sharing a copy, but shall provide a meaningful summary where the data subject would otherwise not be able to understand the its content or exercise his/her rights. On request, the Parties shall provide the data subject with the reasons for the redactions, to the extent possible without revealing the redacted information. This Clause is without prejudice to the obligations of the data exporter under Articles 13 and 14 of Regulation (EU) 2016/679.

8.4 Accuracy

If the data importer becomes aware that the personal data it has received is inaccurate, or has become outdated, it shall inform the data exporter without undue delay. In this case, the data importer shall cooperate with the data exporter to erase or rectify the data.

8.5 Duration of processing and erasure or return of data

Processing by the data importer shall only take place for the duration specified in Annex I.B. After the end of the provision of the processing services, the data importer shall, at the choice of the data exporter, delete all personal data processed on behalf of the data exporter and certify to the data exporter that it has done so, or return to the data exporter all personal data processed on its behalf and delete existing copies. Until the data is deleted or returned, the data importer shall continue to ensure compliance with these Clauses. In case of local

laws applicable to the data importer that prohibit return or deletion of the personal data, the data importer warrants that it will continue to ensure compliance with these Clauses and will only process it to the extent and for as long as required under that local law. This is without prejudice to Clause 14, in particular the requirement for the data importer under Clause 14(e) to notify the data exporter throughout the duration of the contract if it has reason to believe that it is or has become subject to laws or practices not in line with the requirements under Clause 14(a).

8.6 Security of processing

1. The data importer and, during transmission, also the data exporter shall implement appropriate technical and organisational measures to ensure the security of the data, including protection against a breach of security leading to accidental or unlawful destruction, loss, alteration, unauthorised disclosure or access to that data (hereinafter'personal data breach'). In assessing the appropriate level of security, the Parties shall take due account of the state of the art, the costs of implementation, the nature, scope, context and purpose(s) of processing and the risks involved in the processing for the data subjects. The Parties shall in particular consider having recourse to encryption or pseudonymisation, including during transmission, where the purpose of processing can be fulfilled in that manner. In case of pseudonymisation, the additional information for attributing the personal data to a specific data subject shall, where possible, remain under the exclusive control of the data exporter. In complying with its obligations under this paragraph, the data importer shall at least implement the technical and organisational measures specified in Annex II. The data importer shall carry out regular checks to ensure that these measures continue to provide an appropriate level of security.

2. The data importer shall grant access to the personal data to members of its personnel only to the extent strictly necessary for the implementation, management and monitoring of the contract. It shall ensure that persons authorised to process the personal data have committed themselves to confidentiality or are under an appropriate statutory obligation of confidentiality.

3. In the event of a personal data breach concerning personal data processed by the data importer under these Clauses, the data importer shall take appropriate measures to address the breach,including measures to mitigate its adverse effects. The data importer shall also notify the data exporter without undue delay after having become aware of the breach. Such notification shall contain the details of a contact point where more information can be obtained, a description of the nature of the breach (including, where possible, categories and approximate number of data subjects and personal data records concerned), its likely consequences and the measures taken or proposed to address the breach including, where appropriate, measures to mitigate its possible adverse effects. Where, and in so far as, it is not possible to provide all information at the same time, the initial notification shall contain the information then available and further information shall, as it becomes available, subsequently be provided without undue delay.

4. The data importer shall cooperate with and assist the data exporter to enable the data exporter to comply with its obligations under Regulation (EU) 2016/679, in particular to notify the competent supervisory authority and the affected data subjects, taking into account the nature of processing and the information available to the data importer.

8.7 Sensitive data

Where the transfer involves personal data revealing racial or ethnic origin, political opinions, religious or philosophical beliefs, or trade union membership, genetic data, or biometric data for the purpose of uniquely identifying a natural person, data concerning health or a person's sex life or sexual orientation, or data relating to criminal convictions and offences (hereinafter 'sensitive data'), the data importer shall apply the specific

restrictions and/or additional safeguards described in Annex I.B.

8.8 Onward transfers

The data importer shall only disclose the personal data to a third party on documented instructions from the data exporter. In addition, the data may only be disclosed to a third party located outside the European Union (in the same country as the data importer or in another third country, hereinafter 'onward transfer') if the third party is or agrees to be bound by these Clauses, , under the appropriate Module, or if:

1. the onward transfer is to a country benefitting from an adequacy decision pursuant to Article 45 of Regulation (EU) 2016/679 that covers the onward transfer;

2. the third party otherwise ensures appropriate safeguards pursuant to Articles 46 or 47 Regulation of (EU) 2016/679 with respect to the processing in question;

3. the onward transfer is necessary for the establishment, exercise or defence of legal claims in the context of specific administrative, regulatory or judicial proceedings; or

4.) the onward transfer is necessary in order to protect the vital interests of the data subject or of another natural person.

Any onward transfer is subject to compliance by the data importer with all the other safeguards under these Clauses, in particular purpose limitation.

8.9 Documentation and compliance

1. The data importer shall promptly and adequately deal with enquiries from the data exporter that relate to the processing under these Clauses.

2. The Parties shall be able to demonstrate compliance with these Clauses. In particular, the data importer shall keep appropriate documentation on the processing activities carried out on behalf of the data exporter.

3. The data importer shall make available to the data exporter all information necessary to demonstrate compliance with the obligations set out in these Clauses and at the data exporter's request, allow for and contribute to audits of the processing activities covered by these Clauses, at reasonable intervals or if there are indications of non-compliance. In deciding on a review or audit, the data exporter may take into account relevant certifications held by the data importer.

4. The data exporter may choose to conduct the audit by itself or mandate an independent auditor. Audits may include inspections at the premises or physical facilities of the data importer and shall, where appropriate, be carried out with reasonable notice.

5. The Parties shall make the information referred to in paragraphs (b) and (c), including the results of any audits, available to the competent supervisory authority on request.

Clause 9

Use of sub-processors

1. GENERAL WRITTEN AUTHORISATION The data importer has the data exporter's general authorisation for the engagement of sub-processor(s) from an agreed list. The data importer shall specifically inform the data exporter in writing of any intended changes to that list through the addition or replacement of sub-processors at least ten(10) days in advance, thereby giving the data exporter sufficient time to be able to

object to such changes prior to the engagement of the sub-processor(s). The data importer shall provide the data exporter with the information necessary to enable the data exporter to exercise its right to object.

2. Where the data importer engages a sub-processor to carry out specific processing activities (on behalf of the data exporter), it shall do so by way of a written contract that provides for, in substance, the same data protection obligations as those binding the data importer under these ACTIVE/110240378.1 7 Clauses, including in terms of third-party beneficiary rights for data subjects. 1 The Parties agree that, by complying with this Clause, the data importer fulfils its obligations under Clause 8.8. The data importer shall ensure that the sub-processor complies with the obligations to which the data importer is subject pursuant to these Clauses.

3. The data importer shall provide, at the data exporter's request, a copy of such a sub- processor agreement and any subsequent amendments to the data exporter. To the extent necessary to protect business secrets or other confidential information, including personal data, the data importer may redact the text of the agreement prior to sharing a copy.

4. The data importer shall remain fully responsible to the data exporter for the performance of the sub-processor's obligations under its contract with the data importer. The data importer shall notify the data exporter of any failure by the sub- processor to fulfil its obligations under that contract

5. The data importer shall agree a third-party beneficiary clause with the sub-processor whereby -- in the event the data importer has factually disappeared, ceased to exist in law or has become insolvent -- the data exporter shall have the right to terminate the sub-processor contract and to instruct the sub-processor to erase or return the personal data.

Clause 10

Data subject rights

1. The data importer shall promptly notify the data exporter of any request it has received from a data subject. It shall not respond to that request itself unless it has been authorised to do so by the data exporter.

2. The data importer shall assist the data exporter in fulfilling its obligations to respond to data subjects' requests for the exercise of their rights under Regulation (EU) 2016/679. In this regard, the Parties shall set out in Annex II the appropriate technical and organisational measures, taking into account the nature of the processing, by which the assistance shall be provided, as well as the scope and the extent of the assistance required.

3. In fulfilling its obligations under paragraphs (a) and (b), the data importer shall comply with the instructions from the data exporter.

Clause 11

Redress

1. The data importer shall inform data subjects in a transparent and easily accessible format, through individual notice or on its website, of a contact point authorised to handle complaints. It shall deal promptly with any complaints it receives from a data subject.

2. In case of a dispute between a data subject and one of the Parties as regards compliance with these Clauses, that Party shall use its best efforts to resolve the issue amicably in a timely fashion. The Parties shall keep each other informed about such disputes and, where ACTIVE/110240378.1 8 appropriate,

cooperate in resolving them.

3. Where the data subject invokes a third-party beneficiary right pursuant to Clause 3, the data importer shall accept the decision of the data subject to:
    a. lodge a complaint with the supervisory authority in the Member State of his/her habitual residence or place of work, or the competent supervisory authority pursuant to Clause 13;
    b. refer the dispute to the competent courts within the meaning of Clause 18.
4. The Parties accept that the data subject may be represented by a not-for-profit body, organisation or association under the conditions set out in Article 80(1) of Regulation(EU) 2016/679.
5. The data importer shall abide by a decision that is binding under the applicable EU or Member State law.
6. The data importer agrees that the choice made by the data subject will not prejudice his/her substantive and procedural rights to seek remedies in accordance with applicable laws.

Clause 12
Liability

1. Each Party shall be liable to the other Party/ies for any damages it causes the other Party/ies by any breach of these Clauses.
2. The data importer shall be liable to the data subject, and the data subject shall be entitled to receive compensation, for any material or non-material damages the data importer or its subprocessor causes the data subject by breaching the third-party beneficiary rights under these Clauses.
3. Notwithstanding paragraph (b), the data exporter shall be liable to the data subject, and the data subject shall be entitled to receive compensation, for any material or non-material damages the data exporter or the data importer (or its sub-processor) causes the data subject by breaching the third-party beneficiary rights under these Clauses. This is without prejudice to the liability of the data exporter and, where the data exporter is a processor acting on behalf of a controller, to the liability of the controller under Regulation (EU) 2016/679 or Regulation (EU) 2018/1725, as applicable.
4. The Parties agree that if the data exporter is held liable under paragraph (c) for damages caused by the data importer (or its sub-processor), it shall be entitled to claim back from the data importer that part of the compensation corresponding to the data importer's responsibility for the damage.
5. Where more than one Party is responsible for any damage caused to the data subject as a result of a breach of these Clauses, all responsible Parties shall be jointly and severally liable and the data subject is entitled to bring an action in court against any of these Parties.
6. The Parties agree that if one Party is held liable under paragraph (e), it shall be entitled to claim back from the other Party/ies that part of the compensation corresponding to its / their responsibility for the damage.
7. The data importer may not invoke the conduct of a sub-processor to avoid its own liability.

Clause 13
Supervision

1. Where the data exporter is established in an EU Member State: The supervisory authority with

responsibility for ensuring compliance by the data exporter with Regulation (EU) 2016/679 as regards the data transfer, as indicated in Annex I.C, shall act as competent supervisory authority.
The supervisory authority of one of the Member States in which the data subjects whose personal data is transferred under these Clauses in relation to the offering of goods or services to them, or whose behaviour is monitored, are located, as indicated in Annex I.C, shall act as competent supervisory authority.

2. The data importer agrees to submit itself to the jurisdiction of and cooperate with the competent supervisory authority in any procedures aimed at ensuring compliance with these Clauses. In particular, the data importer agrees to respond to enquiries, submit to audits and comply with the measures adopted by the supervisory authority, including remedial and compensatory measures. It shall provide the supervisory authority with written confirmation that the necessary actions have been taken.

Section 3 - Local Laws and Obligations in case of access by public authorities

Clause 14
Local Laws and Obligations in Case of Access by Public Authorities

1. The Parties warrant that they have no reason to believe that the laws and practices in the third country of destination applicable to the processing of the personal data by the data importer, including any requirements to disclose personal data or measures authorising access by public authorities, prevent the data importer from fulfilling its obligations under these Clauses. This is based on the understanding that laws and practices that respect the essence of the fundamental rights and freedoms and do not exceed what is necessary and proportionate in a democratic society to safeguard one of the objectives listed in Article 23(1) of Regulation (EU) 2016/679, are not in contradiction with these Clauses.

2. The Parties declare that in providing the warranty in paragraph (a), they have taken due account in particular of the following elements:

    a. the specific circumstances of the transfer, including the length of the processing chain, the number of actors involved and the transmission channels used; intended onward transfers; the type of recipient; the purpose of processing; the categories and format of the transferred personal data; the economic sector in which the transfer occurs; the storage location of the data transferred;

    b. the laws and practices of the third country of destination– including those requiring the disclosure of data to public authorities or authorising access by such authorities – relevant in light of the specific circumstances of the transfer, and the applicable limitations and safeguards;

    c. any relevant contractual, technical or organisational safeguards put in place to supplement the safeguards under these Clauses, including measures applied during transmission and to the processing of the personal data in the country of destination.

3. The data importer warrants that, in carrying out the assessment under paragraph (b), it has made its best efforts to provide the data exporter with relevant information and agrees that it will continue to cooperate with the data exporter in ensuring compliance with these Clauses

4. The Parties agree to document the assessment under paragraph (b) and make it available to the competent supervisory authority on request.

5. The data importer agrees to notify the data exporter promptly if, after having agreed to these Clauses and for the duration of the contract, it has reason to believe that it is or has become subject to laws or practices not in line with the requirements under paragraph (a), including following a change in the laws

of the third country or a measure (such as a disclosure request) indicating an application of such laws in practice that is not in line with the requirements in paragraph (a).

6. Following a notification pursuant to paragraph (e), or if the data exporter otherwise has reason to believe that the data importer can no longer fulfil its obligations under these Clauses, the data exporter shall promptly identify appropriate measures (e.g. technical or organisational measures to ensure security and confidentiality) to be adopted by the data exporter and/or data importer to address the situation. The data exporter shall suspend the data transfer if it considers that no appropriate safeguards for such transfer can be ensured, or if instructed the competent supervisory authority to do so. In this case, the data exporter shall be entitled to terminate the contract, insofar as it concerns the processing of personal data under these Clauses. If the contract involves more than two Parties, the data exporter may exercise this right to termination only with respect to the relevant Party, unless the Parties have agreed otherwise. Where the contract is terminated pursuant to this Clause, Clause 16(d) and (e) shall apply.

Clause 15

Obligations of the Data Importer in Case of Access by Public Authorities

15.1 Notification

1. The data importer agrees to notify the data exporter and, where possible, the data subject promptly (if necessary with the help of the data exporter) if it:
    a. receives a legally binding request from a public authority, including judicial authorities, under the laws of the country of destination for the disclosure of personal data transferred pursuant to these Clauses; such notification shall include information about the personal data requested, the requesting authority,the legal basis for the request and the response provided; or
    b. becomes aware of any direct access by public authorities to personal data transferred pursuant to these Clauses in accordance with the laws of the country of destination; such notification shall include all information available to the importer.
2. If the data importer is prohibited from notifying the data exporter and/or the data subject under the laws of the country of destination, the data importer agrees to use its best efforts to obtain a waiver of the prohibition, with a view to communicating as much information as possible, as soon as possible. The data importer agrees to document its best efforts in order to be able to demonstrate them on request of the data exporter.
3. Where permissible under the laws of the country of destination, the data importer agrees to provide the data exporter, at regular intervals for the duration of the contract, with as much relevant information as possible on the requests received (in particular, number of requests, type of data requested, requesting authority/ies, whether requests have been challenged and the outcome of such challenges, etc.).
4. The data importer agrees to preserve the information pursuant to paragraphs (a) to (c) for the duration of the contract and make it available to the competent supervisory authority on request.
5. Paragraphs (a) to (c) are without prejudice to the obligation of the data importer pursuant to Clause 14(e) and Clause 16 to inform the data exporter promptly where it is unable to comply with these Clauses.

15.2 Review of legality and data minimisation

1. The data importer agrees to review the legality of the request for disclosure, in particular whether it remains within the powers granted to the requesting public authority, and to challenge the request if,

after careful assessment, it concludes that there are reasonable grounds to consider that the request is unlawful under the laws of the country of destination, applicable obligations under international law and principles of international comity. The data importer shall, under the same conditions, pursue possibilities of appeal. When challenging a request, the data importer shall seek interim measures with a view to suspending the effects of the request until the competent judicial authority has decided on its merits. It shall not disclose the personal data requested until required to do so under the applicable procedural rules. These requirements are without prejudice to the obligations of the data importer under Clause 14(e).

2. The data importer agrees to document its legal assessment and any challenge to the request for disclosure and, to the extent permissible under the laws of the country of destination, make the documentation available to the data exporter. It shall also make it available to the competent supervisory authority on request.

3. The data importer agrees to provide the minimum amount of information permissible when responding to a request for disclosure, based on a reasonable interpretation of the request.

Section 4 - Final Provisions

Clause 16
Non-Compliance with the Clauses and Termination

1. The data importer shall promptly inform the data exporter if it is unable to comply with these Clauses, for whatever reason.

2. In the event that the data importer is in breach of these Clauses or unable to comply with these Clauses, the data exporter shall suspend the transfer of personal data to the data importer until compliance is again ensured or the contract is terminated. This is without prejudice to Clause 14(f).

3. The data exporter shall be entitled to terminate the contract, insofar as it concerns the processing of personal data under these Clauses, where:

    a. the data exporter has suspended the transfer of personal data to the data importer pursuant to paragraph (b) and compliance with these Clauses is not restored within a reasonable time and in any event within one month of suspension;

    b. the data importer is in substantial or persistent breach of these Clauses; or

    c. the data importer fails to comply with a binding decision of a competent court or supervisory authority regarding its obligations under these Clauses.

4. In these cases, it shall inform the competent supervisory authority of such non-compliance. Where the contract involves more than two Parties, the data exporter may exercise this right to termination only with respect to the relevant Party, unless the Parties have agreed otherwise.

5. Personal data that has been transferred prior to the termination of the contract pursuant to paragraph (c) shall at the choice of the data exporter immediately be returned to the data exporter or deleted in its entirety. The same shall apply to any copies of the data. The data importer shall certify the deletion of the data to the data exporter. Until the data is deleted or returned, the data importer shall continue to ensure compliance with these Clauses. In case of local laws applicable to the data importer that prohibit the return or deletion of the transferred personal data, the data importer warrants that it will continue to ensure compliance with these Clauses and will only process the data to the extent and for as long as

required under that local law.

6. Either Party may revoke its agreement to be bound by these Clauses where (i) the European Commission adopts a decision pursuant to Article 45(3) of Regulation (EU) 2016/679 that covers the transfer of personal data to which these Clauses apply; or (ii) Regulation (EU) 2016/679 becomes part of the legal framework of the country to which the personal data is transferred. This is without prejudice to other obligations applying to the processing in question under Regulation (EU) 2016/679.

Clause 17
Governing Law

These Clauses shall be governed by the law of the EU Member State in which the data exporter is established. Where such law does not allow for third-party beneficiary rights, they shall be governed by the law of another EU Member State that does allow for third-party beneficiary rights. The Parties agree that this shall be the law of the Netherlands.

Clause 18
Choice of Forum and Jurisdiction

1. Any dispute arising from these Clauses shall be resolved by the courts of an EU Member State
2. The Parties agree that those shall be the courts of the Netherlands.
3. A data subject may also bring legal proceedings against the data exporter and/or data importer before the courts of the Member State in which he/she has his/her habitual residence.
4. The Parties agree to submit themselves to the jurisdiction of such courts

Appendix

ANNEX I

A. LIST OF PARTIES

Data exporter(s):

1. Name:

Address:

Contact person's name, position and contact details:

Activities relevant to the data transferred under these Clauses:

Signature and date:

Role: Controller

Data importer(s):

1. Name: KnowledgeOwl

Address: 4845 Pearl East Cir Ste 118, PMB 30558, Boulder, CO 80301, United States

Contact person's name, position and contact details:

Marybeth Alexander

Tel.: +1 (303) 566-7131

Fax: +1 (303) 566-7131

e-mail: support@knowledgeowl.com

Activities relevant to the data transferred under these Clauses: See Annex I.B

Signature and date:

Role: processor

B. DESCRIPTION OF TRANSFER

Categories of data subjects whose personal data is transferred

Users of KnowledgeOwl

Categories of personal data transferred

Limited personal and technical data including name, email, IP address, and usage data are used by KnowledgeOwl in order to provide our services. Customers can enter other types of data in their knowledge base, but this data is not requested nor tracked by KnowledgeOwl.

Sensitive data transferred (if applicable) and applied restrictions or safeguards that fully take into consideration the nature of the data and the risks involved, such as for instance strict purpose limitation, access restrictions (including access only for staff having followed specialised training), keeping a record of access to the data, restrictions for onward transfers or additional security measures.

KnowledgeOwl does not collect sensitive, personal information.

The frequency of the transfer (e.g. whether the data is transferred on a one-off or continuous basis).

Continuous

Nature of the processing

The limited personal data listed above is processed in order to provide and improve KnowledgeOwl services. Any data voluntarily entered into customer knowledge bases is stored and presented by KnowledgeOwl in accordance with the customer's configuration, but otherwise not processed.

Purpose(s) of the data transfer and further processing

Personal data is processed for the purpose of providing and improving the KnowledgeOwl service.

The period for which the personal data will be retained, or, if that is not possible, the criteria used to determine

that period

Personal data is retained in accordance with our Privacy Policy:
https://support.knowledgeowl.com/help/privacy-policy

For transfers to (sub-) processors, also specify subject matter, nature and duration of the processing

A complete list of subprocessors and their purpose can be found at:
https://support.knowledgeowl.com/help/list-of-sub-processors

All subprocessors are used on a continuous basis for the purpose of providing the KnowledgeOwl service.

C. COMPETENT SUPERVISORY AUTHORITY

Identify the competent supervisory authority/ies in accordance with Clause 13

Location of the Data Exporter

ANNEX II - TECHNICAL AND ORGANISATIONAL MEASURES INCLUDING TECHNICAL AND ORGANISATIONAL MEASURES TO ENSURE THE SECURITY OF THE DATA

Description of the technical and organisational measures implemented by the data importer(s) (including any relevant certifications) to ensure an appropriate level of security, taking into account the nature, scope, context and purpose of the processing, and the risks for the rights and freedoms of natural persons.

Information on technical and organizational data protection measures are outlined publicly at: Security, privacy, and compliance.

ANNEX III – LIST OF SUB-PROCESSORS

The controller has authorised the use of the following sub-processors:

A complete list of subprocessors can be found at List of Sub-processors.

Signature

DATA EXPORTER (Controller)
Name:
Authorised Signature:

DATA IMPORTER (Processor)
Name: KnowledgeOwl
Authorised Signature:



Need a signature? You can **sign our DPA electronically using PandaDoc!**

HIPAA compliance

Last Modified on 05/29/2024 5:28 pm EDT

Your usage of KnowledgeOwl can be HIPAA compliant if you meet the following requirements:

1. Sign a Business Associate Agreement (BAA) with KnowledgeOwl. BAA are available for our Business and Enterprise customers. Please contact us to execute a BAA.

2. For pre-2021 customers: Enable the "Force SSL links" option under **Settings** > **Basic**. This ensures that your data is always encrypted. KnowledgeOwl encrypts data in-transit and at-rest. (Customers joining us in 2021 and beyond all use SSL by default!)

HIPAA Dos and Don't

There are many features in KnowledgeOwl. Some will help with HIPAA-compliance, while others could cause issues. Here are some dos and don'ts for your HIPAA-compliant configuration.

DO	DON'T
Use unique logins for each author and reader	Share logins
Use Single Sign-On for authentication	Use less secure authentication options like shared passwords
Force SSL	Use the "remember me" function to keep you logged in
When possible, require authentication to view any image or file from your file library	Upload files containing PHI to the file library. Files are not encrypted.
Use teams, groups and roles to practice the principle of least privilege with regards to access control	Increase the reader expiration to keep readers logged in longer than necessarily. Readers should be automatically logged out after a period of inactivity. The default is 2 hours.
Disable comment notification emails when using comments. Emails are not encrypted.	Approve any comment submissions containing PHI.
Enable "Do not store any collected ticket information within KnowledgeOwl" when using the contact form that might contain PHI.	Use the Send Email method when using the contact form. Emails are not encrypted.

Deleting data

It's a HIPAA best practice to store PHI in as few places as possible. When you delete items in KnowledgeOwl, they are still stored in a deleted status and are not permanently destroyed by default.

If you realize that you accidentally added PHI to KnowledgeOwl and want to permanently delete it from the database, contact us to have it destroyed.

Breach notification rule

The Breach Notification Rule requires KnowledgeOwl, if acting as a business associate, to notify you, the covered entity, of breaches at or by the business associate. We will notify you without unreasonable delay and no later than 60 days from the discovery of the breach.

When possible, we will provide you with the identification of each individual affected by the breach as well as any other available information required to be provided by you in your notification to affected individuals. While you are ultimately responsible for ensuring individuals are notified, you may delegate the responsibility of providing individual notices to us as the business associate.

If you have any questions or would like to lodge a complaint regarding our compliance of the Breach Notification Rule, you can email support@knowledgeowl.com. You may also file an online compliant with the Office of Civil Rights (OCR).

Security and reliability

Last Modified on 05/29/2024 5:27 pm EDT



We occasionally receive security questions from companies wanting to use KnowledgeOwl. In general, we do not want to publicly expose too much information about our security practices and infrastructure because that information would help the very people we are trying to protect ourselves against. However, since security is important to many people, we've compiled a list of commonly asked questions.

If you are a security researcher or have found a vulnerability, please consult our Vulnerability Disclosure Policy.

Data Center Security

- We are hosted on Amazon Web Services (AWS). Our primary data center is in US East Region 1 (N. Virginia), and we maintain daily backups in US West (Oregon).
- Our data center is monitored by closed circuit television and a 24x7x365 data center operations team who guard the facility while secure access control and biometric systems provide further layers of security.
- A Network Operations Center (NOC) staff monitors the data center's network 24x7x365, while their network engineers and hosting datacenter personnel are available at any time in the event of an emergency.
- Our data center has regulated climate control and does not rely on a power grid to ensure that power is never interrupted.

Data Protection

- We are GDPR compliant and Privacy Shield certified.
- Your data is yours, period. We will never sell it nor share it with third-party marketers.
- Your contact information will never be shared with or sold to a third-party.
- It is not possible for your application data to be retrieved by anyone other than authorized representatives of KnowledgeOwl.
- If for some reason KnowledgeOwl has to close its doors tomorrow, the software would be made open source for you to continue using.
- If you want to leave KnowledgeOwl, you can always take your data with you.

Data Retention

- We do not save customer data that we do not need.

- We review and delete data from KnowledgeOwl once it is no longer need.
- We delete backups of customer data on a rolling basis to ensure that unnecessary data does not remain in our possession.

Uptime and Reliability

- We strive to maintain at least a 99.5% uptime. We guarantee a 99.5% uptime for Business customers and a 99.9% uptime for Enterprise plan.
- We have emergency and disaster recovery plans, and we test them annually.
- In case of a catastrophic event, operations can continue in an off-site location.
- 100% lifetime happiness guarantee. You want a refund, you got it.

Application Level Security

- All KnowledgeOwl account passwords are hashed, meaning even our own staff cannot view them. If you lose your password, it can only be reset, not retrieved.
- All knowledge bases can be forced to use TLS, and access can be restricted to SSO.
- All KnowledgeOwl application data is encrypted in transit and at rest.
- It is not possible for your application data to be retrieved by anyone other than authorized representatives of KnowledgeOwl.

Internal IT Security

- KnowledgeOwl utilizes an identity and access management tool to centralize and control access to all systems.
- Access to customer data requires VPN access and multi-factor authentication.
- Vulnerability scans are performed weekly along with continuous behavioral monitoring and intrusion detection.
- All systems have up-to-date virus and malware protection.

Internal Protocol and Education

- Background checks are performed on all new employees, with periodic background checks performed on all employees.
- System and data access is on a need-to-know basis. Representatives only have enough access to do their jobs.
- We continuously train all representatives on security, compliance, and privacy.

Support

- KnowledgeOwl offers a variety of support options, including a self-help knowledge base, email, and phone support for all accounts.
- Support is available by phone and email during normal business hours with continued monitoring of urgent requests outside of business hours.
- Support is provided by the same people who help design and develop the software, all of whom have training and experience in both customer support and development.
- Support is available free of charge to all accounts, no matter the plan level or status.

Development and Upgrades

- KnowledgeOwl practices customer-driven development, so customer feedback is paramount in the

design and development of the software.

- We practice agile development, so we fix problems and build features as quickly as possible to ensure that the software is always improving.
- Fixes and upgrades are released multiple times a week, with major upgrades and features being released monthly.
- Upgrades occur automatically with no effort or disruption to customer accounts.
- KnowledgeOwl provides an open API to allow for quick and easy integrations with other products and existing systems.

We are happy to fill out more detailed security assessments when necessary. Since these forms can be time-consuming, we only offer them for free as part of our annual Enterprise subscriptions. We treat them as a paid professional service for other subscriptions, starting at $500/assessment.

Payment card industry (PCI) compliance

Last Modified on 05/29/2024 5:27 pm EDT

Payment card industry (PCI) compliance is a form of compliance that companies who accept payment cards (such as credit cards and debit cards) should maintain.

KnowledgeOwl maintains PCI-A compliance.

This level of compliance is appropriate for companies who don't directly touch payment card data. In our case, we use third-party tools to handle all payment data for us so that it never touches our servers and impossible for our team to retrieve.

If your organization needs more details on our PCI-A compliance, you can contact us to request a copy of our PCI-A compliance Self-Assessment Questionnaire.

Consensus Assessments Initiative Questionnaire (CAIQ)

Last Modified on 05/29/2024 5:28 pm EDT

The Consensus Assessments Initiative Questionnaire (CAIQ) is a standardized security and vendor assessment questionnaire created by the Cloud Security Alliance (CSA). (And yes, it's pronounced like cake).

The CAIQ is an industry-accepted way to document security controls for SaaS services (among others), using a Yes/No set of questions. We have completed STAR Level 1 by submitting our CAIQ, which is a self-assessment.

This CAIQ and related materials are accessible through the CSA's Star Registry. For many organizations, the CAIQ is an acceptable alternative to having KnowledgeOwl staff complete a vendor security assessment, and it is available for free at the Star Registry listing for KnowledgeOwl.

If your evaluation or use of KnowledgeOwl requires some type of security assessment or review, this publicly-available CAIQ can be a great place to start discussions with your security review team!

If you need a more detailed, individual assessment:

- If you are an Enterprise Extras customer, we include these assessments for free as one of your "extras."
- If you're not an Enterprise Extras customer, you can pay per assessment as a Subscription add-on.

GDPR

Last Modified on 05/29/2024 5:27 pm EDT

KnowledgeOwl is fully GDPR compliant as of May 25, 2018.

April 4, 2022: We have updated our Data Processing Addendum (DPA) to use the new Standard Contractual Clauses issued by the EU. Please see the linked page if you wish to review and/or sign the updated DPA.

What is the GDPR?

The General Data Protection Regulation (GDPR) is an EU privacy law that went into effect on May 25, 2018. It regulates how businesses treat and use the personal data of EU citizens.

How does the GDPR affect KnowledgeOwl?

If your business collects, records, stores, or otherwise interacts with the personal data of EU citizens, then the GDPR likely applies to you. The GDPR applies to KnowledgeOwl because we both collect and process the data of EU citizens in our business. It also affects our clients who either reside in the EU or collect, store, or otherwise process the data of EU citizens.

How does KnowledgeOwl track compliance?

For your review, we've outlined how the GDPR applies to KnowledgeOwl and how we achieved compliance.

Personal data

KnowledgeOwl does process the personal data of EU citizens. While we do not collect sensitive data from our customers, our customers may be storing sensitive personal data in their own KnowledgeOwl accounts. This might include the personal data of children.

March 27, 2018: We are currently reviewing our terms and conditions along with other policies with regards to data processing. Updates may be made in regards to what type of data we allow to be stored in KnowledgeOwl, specifically sensitive personal data.

May 24, 2018: Our Data Processing Addendum extends our terms and condition to provide full GDPR compliance for our customers in the EU or processing EU personal data. You can review and sign our DPA online.

Scope of application

While we are located outside the EU, we do collect data from our customers that reside in the EU. We also work with vendors in the EU and have customers who both reside in and collect data from EU citizens as well.

In terms of the GDPR, KnowledgeOwl acts as both a controller and processor.



March 27, 2018: We are working on putting in place a data processing agreement for customers requiring one under the new law.



May 23, 2018: We have published our Data Processing Addendum. You can review and sign our DPA online.

Lawful grounds for processing and transparency requirements

KnowledgeOwl does not currently obtain explicit consent for personal data collection outside of our terms and conditions.



March 27, 2018: KnowledgeOwl will begin obtaining consent from our customers and website visitors to process their personal data. In the spirit of transparency, people will be informed about what information is being collected and why. Consent can be withdrawn at any time.



May 23, 2018: We have published our Cookie Declaration page and are collecting explicit consent for personal data collection.

Data protection principles and accountability

To protect both our and our customers' data, we have appropriate security measures and policies in place. We are actively working towards compliance with GDPR data protection policies.



March 27, 2018: We are updating our data protection policy to align and comply with the GDPR. Once updated, we will be instituting training to ensure all team members are aware of and equipped to uphold the policy.



May 24, 2018: We have updated our data protection policy, communicated it to all team members, and instituted a mandatory data protection training.

Data subject rights

We currently do not have a mechanism for customers to be informed of their rights as data subjects.



March 27, 2018: Once we have the appropriate mechanisms in place, we will be communicating data subject rights to customers.

May 24, 2018: We've updated our privacy policy in compliance with the GDPR and Privacy Shield principles.

Data breaches

KnowledgeOwl currently has processes in place to detect, document, and communicate any data breaches.

March 27, 2018: We are reviewing our incident response plan in order to ensure compliance with the GDPR.

May 24, 2018: We have updated our data breach response policy to ensure compliance with the GDPR.

International data transfers outside the EEA

KnowledgeOwl does transfer data outside the European Economic Area (EEA).

March 27, 2018: KnowledgeOwl is working towards certifying its compliance with the EU-U.S. Privacy Shield Framework and the Swiss-U.S Privacy Shield Framework.

May 23, 2018: We received notification that our Privacy Shield self-certification submission is completed and we are now waiting on confirmation that we have been officially added to the Privacy Shield list. Privacy Shield benefits are assured from the date we are placed on the list.

June 6, 2018: Our Privacy Shield self-certification has been finalized and is effective as of 6/6/2018. You can now find us on the participant list on the Privacy Shield website.

September 1, 2020: Due to the recent CJEU ruling on Privacy Shield, we have adopted Standard Contractual Clauses as part of our Data Processing Addendum (DPA). Please see the linked page if you wish to review and/or sign the updated DPA.

April 4, 2022: We have updated our Data Processing Addendum (DPA) to use the new Standard Contractual Clauses issued by the EU. Please see the linked page if you wish to review and/or sign the updated DPA.

February 15, 2023: It has come to our attention that use of Google Fonts may conflict with GDPR

compliance. We'll update this page once we have a solution in place.

May 1, 2023: We've shifted from Google Fonts to self-hosting all of our fonts.

Other controller obligations

As a data controller, we are currently reviewing all of our obligations under the GDPR and working towards compliance.

March 27, 2018: We are working on documenting policies and procedures for all aspects of the GDPR. This includes recording legal grounds for processing any and all personal data, integrating compliance into processing activities, training employees, and reviewing processor contracts.

May 24, 2018: We have performed a GDPR audit and recorded legal grounds for processing personal data, updated our website and application to integrate GDPR compliance, trained our team, and signed DPA with our core sub-processors to whom we transfer personal data. We have added GDPR-compliance as a requirement for all vendors who process personal data on our behalf.

Other processor obligations

KnowledgeOwl acts as a data processor for our customers who collect and store the personal data of EU citizens. As such, we are also working on ensuring our compliance as a data processor. We are working to be able to assist our customers in ensuring their own compliance under the GDPR.

March 27, 2018: We are working on implementing a data processing agreement for those customers to whom the GDPR applies. This includes stipulating terms for data processing and recording legal grounds for the data collection.

May 23, 2018: We have published our Data Processing Addendum. You can review and sign our DPA online.

April 4, 2022: We have updated our Data Processing Addendum (DPA) to use the new Standard Contractual Clauses issued by the EU. Please see the linked page if you wish to review and/or sign the updated DPA.

How can I maintain GDPR compliance of data stored in KnowledgeOwl?

We've captured the various places you might store data governed by GDPR, along with how to purge or request purging of that data, in Maintaining GDPR compliance with your own data.

Maintain GDPR compliance with your own data

Last Modified on 05/29/2024 5:27 pm EDT

KnowledgeOwl works hard to maintain our compliance with GDPR and we know you do, too.

There are a few places where we may be storing information that you might need to remove as part of a GDPR request:

- **profile icon/name > Readers:** The Readers page can store first and last name and email address for your readers, plus any custom fields you may have set up.
    - You can purge all deleted reader accounts yourself. See Purge deleted readers for more information.
- **Library > Files:** If you delete a file that stores PII or other data that falls within GDPR requirements, you can contact us to permanently purge and delete those files.
    - Files must have already been deleted and we generally purge ALL deleted files, so be sure there's nothing in the Deleted Files filter that you care about before initiating this request.
    - We are tracking feature requests for making this work similarly to the Readers purge, so contact us if you'd like to see it added as a feature!
- **Reporting > Contact Form:** Contact form submissions may contain name and email address, any details someone has submitted, plus any custom fields you've set up.
    - If you need to purge contact form submissions older than a certain time frame, contact us for help.
    - We are tracking feature requests for making this work similarly to the Readers purge, so let us know if you'd like to see it added as a feature!
- **Reporting > Comments:** Deleted comments may contain name and email address.
    - You can contact us to purge ALL deleted comments.
    - We are tracking feature requests for making this work similarly to the Readers purge, so let us know if you'd like to see it added as a feature!
- **Article content:** We generally don't advise storing anything governed by GDPR directly within the content of your articles. However, if you discover that you have some, please first delete the article in question. You can then contact us to permanently delete/purge that article and its content from our systems.

Uptime Service Level Agreements

Last Modified on 05/29/2024 5:27 pm EDT

We strive to provide the best possible uptime. For those customers that demand more than good intentions, we offer uptime service level agreements on our Business and Enterprise plans.

View our uptime on our KnowledgeOwl status page.

Business SLA

When your knowledge base is business critical, we recognize that you are taking a big risk by trusting a third party to maintain the availability and performance of your knowledge base. That's why we guarantee a 99.5% uptime for customers on the Business plan.

How it works

- We guarantee a 99.5% monthly uptime for customers with the Business Extras subscription.
- Customers can monitor our uptime on our status page and view historical data.
- If we fail to meet that level of service for any month, Business Extras customers will automatically receive a credit on their next billing cycle corresponding to the amount of downtime:
  - Less than 99.5% uptime in a given month (more than 3 hours and 39 minutes downtime) = 1 week credit
  - Less than 98.5% uptime in a given month (more than 10 hours 57 minutes downtime) = 2 week credit
  - Less than 97.5% uptime in a given month (more than 18 hours 16 minutes downtime) = 1 month credit

Refer to SLA Definitions for definitions of uptime and downtime and view the events we exclude from this policy.

Enterprise SLA

Our Enterprise customers get the best SLA we can offer. We have you covered with a 99.9% guaranteed uptime and higher thresholds for service level credits.

How it works

- We guarantee a 99.9% monthly uptime for customers on the Enterprise plan.
- Customers can monitor our uptime on our status page and view historical data.
- If we fail to meet that level of service for any month, Enterprise plan customers will automatically receive a credit on their next billing cycle corresponding to the amount of downtime:

- Less than 99.9% uptime in a given month (more than 44 minutes downtime) = 1 week credit
- Less than 99.5% uptime in a given month (more than 3 hours 39 minutes downtime) = 2 week credit
- Less than 99.0% uptime in a given month (more than 7 hours 18 minutes downtime) = 1 month credit

Refer to SLA Definitions for definitions of uptime and downtime and view the events we exclude from this policy.

SLA Details

What is uptime?

Uptime is the percentage of total possible time KnowledgeOwl is available to you. Monthly uptime is calculated by dividing the number of minutes of downtime by the total number of minutes in the month. Visit our status page to view our current and historical uptime.

What is downtime?

Downtime refers to time when KnowledgeOwl is not available.

How is downtime calculated?

We use external server monitoring software Pingdom to monitor our servers.

SLA Exclusions

Our uptime SLA excludes performance issues caused by:

- Scheduled downtime or maintenance. We'll give you 48 hours advance notice and schedule no more than 12 hours per year.
- Factors outside of our reasonable control, aka force majeure in legalese. This includes things like acts of war, terrorism, crime, and God (hurricanes, earthquakes, floods, etc).
- Actions or inactions of a third party. This can range from things like you allowing your privately hosted domain name to lapse to a DDoS attack.
- Your services/equipment or third party services/equipment that are not within the primary control of KnowledgeOwl. This could be your own firewall preventing connection to KnowledgeOwl or an outage with KnowledgeOwl's hosting provider, Amazon Web Services.
- Suspension or termination of your right to use KnowledgeOwl in accordance with our terms and conditions. This could be the result of using your knowledge base for illegal activities such as a phishing scheme or being seriously past due on payment (more than 90 days).

List of Sub-processors

Last Modified on 08/27/2024 9:32 pm EDT

Below is a list of sub-processors we work with. Subscribe using the link above to receive updates.

Sub-processor	Purpose	Start Date	Location
Amazon Web Services (AWS)	Cloud infrastructure hosting	June 1, 2015	United States of America
Stripe	Online payment processing	June 1, 2015	United States of America Ireland
Alchemer (Formerly SurveyGizmo)	Customer surveys (e.g. annual survey)	June 1, 2015	United States of America
Mailgun	Transactional emails	November 1, 2018	United States of America
Help Scout	Help desk software	June 1, 2015	United States of America
FullStory	User session recordings and analytics	June 1, 2015	United States of America
G Suite	Business apps for email, calendar, collaboration, file sharing/storage, website and user analytics, and productivity.	June 1, 2015	United States of America
QuickBooks Online	Invoicing	June 1, 2015	United States of America
Slack	Team collaboration and communication	June 1, 2015	United States of America
Mailchimp	Email campaigns	June 1, 2015	United States of America
Statuspage	Status and incident communication	April 31, 2018	United States of America
PandaDoc	Esignatures and document management	June 1, 2018	United States of America
Calendly	Online scheduling	July 25, 2022	United States of America
Stunning	Subscription notifications	July 25, 2022	United States of America

Sub-processor	Purpose	Start Date	Location
Cookiebot	Browser cookie compliance	May 1, 2018	Denmark
PostHog	Usage analytics	July 26, 2023	United States of America
Bento	Email and marketing automation	July 3, 2024	Australia
FastSpring	Merchant of record for KnowledgeOwl subscription and invoice payments	July 10, 2024	United States of America

Change History

August 27, 2024
- Removed HubSpot

July 10, 2024
- Added FastSpring as merchant of record for subscription and invoice payments. Removed ProfitWell.

July 5, 2024
- Removed FirstOfficer and Plausible

July 3, 2024
- Added Bento for email and marketing automation

August 31, 2023
- Added HubSpot for CRM

July 26, 2023
- Added PostHog for product usage analytics

July 22, 2023
- Removed Chameleon

June 29th, 2023
- Added Chameleon to the list of sub-processors

March 17th, 2023
- Added Plausible and Cookiebot to list of sub-processors
    - While customer data is not sent to either Plausible or Cookiebot for processing, use of KnowledgeOwl can initiate connections to sites owned by these organizations. This means that the IP you are connecting from is disclosed to these sites.

October 7th, 2022
- Beginning of change tracking
- Added Alchemer to list of sub-processors
    - Alchemer (SurvyGizmo) does not act as a sub-processor to any customer data during normal application use and only receives limited customer information when a survey response is recorded (e.g. during the annual customer satisfaction survey). During a recent review of our sub-processor list, we noticed that due to the limited nature of data processing, Alchemer had not been included during the original creation of the sub-processor list. This change corrects this original oversight.

List of Sub-processors

Last Modified on 08/28/2024 11:25 am EDT

Supported cipher suites

Last Modified on 05/29/2024 5:28 pm EDT

As of August 2022, we support these cipher suites:

Cipher Suite Name	Open SSL Name
TLS_ECDHE_RSA_WITH_AES_256_GCM_SHA384	ECDHE-RSA-AES256-GCM-SHA384
TLS_ECDHE_RSA_WITH_AES_128_GCM_SHA256	ECDHE-RSA-AES128-GCM-SHA256
TLS_DHE_RSA_WITH_AES_256_GCM_SHA384	DHE-RSA-AES256-GCM-SHA384
TLS_DHE_RSA_WITH_AES_128_GCM_SHA256	DHE-RSA-AES128-GCM-SHA256

Required IP addresses

Last Modified on 05/29/2024 5:27 pm EDT

If your network setup uses a restrictive firewall or VPN, your IT team will usually ask you what IP addresses they'll need to allow for KnowledgeOwl to work properly. (This may also be a request for a list of IPs to whitelist.)

Here are the IP addresses you can provide them:

- 54.84.80.113 or 159.135.225.75 can be used for outgoing communication from KnowledgeOwl
- 54.152.202.195 is used by incoming traffic

Vulnerability Disclosure Policy



Date of Last Policy Change: November 5th, 2023

At KnowledgeOwl, we take the security and integrity of our customer's data seriously. As such, we welcome input from security researchers to ensure that, should any vulnerabilities in KnowledgeOwl arise, that they can be addressed quickly and effectively. However, to ensure that our customers are not impacted during any vulnerability discovery activities, please follow the terms below before testing for any vulnerabilities.

KnowledgeOwl pledges to not initiate any legal action against researchers that follow the terms below.



We do not offer any monetary rewards (e.g. bounties) for vulnerabilities reported to us.

Scope

Please restrict any testing to the following sites:

- app.knowledgeowl.com
- support.knowledgeowl.com
- www.knowledgeowl.com

Testing KnowledgeOwl customer sites is not allowed.

Creating 1 (one) trial account per researcher is allowed. Should a researcher require a second account, or should the trial period expire before testing is complete, please contact us.

Restrictions

Generally, please do not perform any activities that will negatively impact users or normal functionality of KnowledgeOwl. Additionally, the following actions are specifically restricted:

- Modification of data owned by other users
- Deletion or corruption of data owned by other users
- Denial of service attacks
- Social engineering attacks including phishing
- Email bombing or similar high-volume attacks

- Mass submissions to or scanning of our contact us or support forms
- Creating large amounts of trial accounts

Please do not violate any laws or agreements in order to locate vulnerabilities.

Reporting a Vulnerability

Please report any details of the discovered vulnerability to the following email address: security@knowledgeowl.com

The more details that the researcher is able to provide, the faster we will be able to respond to any vulnerabilities.

Vulnerability Acceptance and Remediation

KnowledgeOwl will make an effort to address every vulnerability report that is submitted to us. Following submission, we will attempt to reproduce the finding to ensure that it is valid and impactful and not a duplicate or previously accepted risk. Should the vulnerability be valid and require remediation, KnowledgeOwl will internally discuss what actions need to be taken and how the vulnerability will be remediated. We will endeavor to keep in contact with the security researcher during this process and provide updates on projected remediation timeline and will inform the researcher of vulnerability remediation. If the researcher wishes to disclose the discovered vulnerability publicly, we ask that they talk to us first, before disclosing the issue publicly.

We do not offer monetary bounties for accepted vulnerabilities. Researchers that report vulnerabilities to us may be eligible for addition to our hall of fame.

KnowledgeOwl is not accepting the following types of reports:

Reports of the following types are currently **not** eligible for KnowledgeOwl's Vulnerability Disclosure Program and will not be accepted.

- Email Spoofing (including DMARC and SPF records)
- Missing Security Headers (such as the HSTS header), unless the lack of such a header directly leads to a vulnerability
- Sessions not expiring on security events, such as password changes
- Password reset tokens not being invalidated by email changes
- Clickjacking
- Vulnerabilities that require odd or unlikely user interaction
- Self-XSS
- XSS in the contents of files uploaded to the file library, unless it can be exploited directly in the UI
    - For example, a report about an HTML file uploaded to the file library, that requires the user to open the file directly using the file's Cloudfront link would not be accepted
- XSS reports for knowledge base frontends or frontend previews (e.g. iframes like those in the style settings). Only XSS reports for app.knowledgeowl.com are accepted.
    - For example, XSS in the descriptions of categories or articles that executes only when viewing the knowledge base frontend or its previews (e.g. {knowledgebase}.knowledgeowl.com) are not accepted.
- Logout Cross-Site Request Forgery
- Resource Flooding
- Missing Rate Limiting

- Weak Password Policy
- EXIF Data Not Stripped on Images
- Browser History Management
- Host header injection, unless an exploit is demonstrated (such as cache-poisoning or XSS)
- Missing Email Verification
- User Account Enumeration
- Missing Certificate Authority Authorization Record
- Cross Domain Script Include
- Open CVEs in third-party JavaScript libraries, unless an exploit is demonstrated
- Missing DNSSEC Records

Questions

If you have any questions about our vulnerability disclosure policies or process, please feel free to email us at security@knowledgeowl.com

Thank You!

KnowledgeOwl would like to thank the following security researchers for their contributions of vulnerability reports and ensuring that KnowledgeOwl can continue to protect the data of its users.

Name	Links
Volodymyr "Bob" Diachenko	https://www.linkedin.com/in/vdyachenko https://twitter.com/MayhemDayOne
Rohit Soni	https://www.linkedin.com/in/rohit-soni-r007/
Ritik Sahni	https://twitter.com/RitikSahni22
Abdelali Khalfi	https://twitter.com/abdela1i
Nayanjyoti Roy	https://www.facebook.com/nrh4ck3r
Jayson Vasquez Rubio	https://facebook.com/100008995930508
Jeffrey Hoekema	https://linkedin.com/in/jeffrey-hoekema
Romel Lanza	https://www.facebook.com/romhel.lanza
Pethuraj M	https://www.pethuraj.in | https://www.pethuraj.com
Priyanka Narayan	https://www.linkedin.com/in/priyanka-narayan-4bb6a416b
Soundar M	https://www.linkedin.com/in/soundar-m-4647b3149/
Yash Agarwal	https://www.linkedin.com/in/yash-agarwal-17464715b/
Anon Tuttu Venus	https://in.linkedin.com/in/anonvenus
Badal Sardhara	https://www.linkedin.com/in/badal-sardhara-9b43a41a5
Mahendra Purbia Rajasthani Hacker	https://www.linkedin.com/in/mahendra-purbia-185b44186
Satyam Jadhav	www.linkedin.com/in/satyam-jadhav-19a900242

Name	Links
Nikhil Ahire	https://www.linkedin.com/in/nikhil-ahire-b28b4b158
Yogeshwaran Chandrasekaran	https://www.linkedin.com/in/yogeshwaran-chandrasekaran-23283518a
Farah Hawa	https://linkedin.com/in/farah-hawa-a012b8162
Akshay Parse	https://www.linkedin.com/in/akshay-parse-0b1176199
Pritam Mukherjee	https://www.linkedin.com/in/pritam-mukherjee-urvil-b75ab9b9/
Robert Aaron	https://linkedin.com/in/robert-aaron-14735b188
Mohamed Saqib C	https://www.linkedin.com/in/mohamed-saqib/
Aamir Usman Khan	https://www.linkedin.com/in/aamir-u-khan/
Jerry Thomas	https://www.linkedin.com/in/jerry-thomas-4a1a69169/
Midhun S	https://www.linkedin.com/in/midhun-s-8a5939150
Akhil Sabu	https://www.linkedin.com/in/akhil-sabu-a2136497
Gawasharks	https://twitter.com/gawasharks
Nirjhar Banik	https://www.linkedin.com/in/neerjhar
Agrah Jain	https://www.linkedin.com/in/agrahjain
Akshay Gaikwad	https://www.linkedin.com/in/akshay-gaikwad-272878165
Kartik Adak	https://www.linkedin.com/in/kartik-adak-81a25918a/
Souvik Roy	https://www.linkedin.com/in/souvikroyofficial
Lokesh Goyal	https://www.linkedin.com/in/lokesh-goyal-79a147157
Bindiya Sardhara	https://www.linkedin.com/in/bindiya-sardhara-24b1a2b4/
Midhun Mohanan	https://www.linkedin.com/in/midhun-mohanan-629173184/
Harsh Vijaykumar Parasiya	https://www.linkedin.com/in/harsh-parsiya-23109b123 https://www.facebook.com/harsh.parasiya
d3vpoo1	https://gitlab.com/jrckmcsb
Chirag Ketan Prajapati	https://www.linkedin.com/in/chirag-prajapati-1bb788191
Gourab Sadhukhan	https://www.linkedin.com/in/gourab-sadhukhan-71158216a
Nitesh Pandey	https://www.linkedin.com/in/osintnitesh
Karan Keswani	https://www.linkedin.com/in/karankeswani1203/
Purbasha Ghosh	https://www.linkedin.com/in/purbasha-ghosh-18b3711a1/
MAHIN VM	https://in.linkedin.com/in/mahin-vm-57413315a
Nishant Narendra Lungare	https://www.linkedin.com/in/nishant-lungare-28b841157
Vikash Kumar	https://www.linkedin.com/in/vikash-kumar-7b938a176 https://twitter.com/vksutk
Shubham Kumar	https://www.linkedin.com/in/shubham-kumar-948722189/
Satyam Jadhav	www.linkedin.com/in/satyam-jadhav-19a900242

Name	Links
Abhijit P. Mali	~~https://twitter.com/Abhijitmali183~~
JIMMI SIMON	https://www.linkedin.com/in/jimmisimon/ |
Praful Apuri	https://www.instagram.com/itz_praffy/ | https://twitter.com/itzpraffy
Shubhdeep	https://www.linkedin.com/in/shubhdeep404
Dhanumaalaian R	https://www.linkedin.com/in/dhanumaalaian-r-b34338189/ | https://twitter.com/dhanumaalaian
Akash.H.C	https://www.linkedin.com/in/akash-h-c-4a4090a7/
Tejavardhan Vishwakarma	https://www.linkedin.com/in/tejavardhan-vishwakarma-32791273
Akash Patil	https://twitter.com/skypatil98
Vani K G	https://www.linkedin.com/in/vani-k-g-016780197
Ramesh Kumar Sekar	https://www.linkedin.com/in/ramesh-kumar-sekar-80964b146/
Anshuman Prajapati	https://www.linkedin.com/in/anshuman-prajapati-b03404195/
Pratik Khalane	https://www.linkedin.com/in/pratik-khalane/
Chetan Pathade	https://www.linkedin.com/in/chetan-pathade/
Souvik Mondal	https://www.linkedin.com/in/souvik-mondal-8b3a0a1b3/
Eeshwar Dronavalli	https://www.linkedin.com/in/eeshwar-dronavalli-5a16ba16a/
Sanidhya Ved	https://www.linkedin.com/in/sanidhya-ved-0734501a2
Kinshuk Kumar	https://www.linkedin.com/in/kinshuk-kumar-4833551a1/
Amit Kumar	https://www.linkedin.com/in/amit-kumar-9853731a4
Ali Hassan Ghori	https://www.linkedin.com/in/alihassanghori/
Mohammed Wasim Khan	https://www.linkedin.com/in/wasimkhan844
Saranya N	https://www.linkedin.com/in/saranya-n-106217197/
Maulik Vaidh	https://twitter.com/maulik1827
Jha kalpeshkumar D.	https://in.linkedin.com/in/kalpeshkumar-jha-b28b7851 https://twitter.com/jha_kalpesh
Rajvee Chauhan	https://www.linkedin.com/in/rajvichauhan
Poonam Panchal	https://www.linkedin.com/in/poonam-panchal-8983b6182
Niraj Mahajan	https://www.linkedin.com/in/niraj1mahajan/
Shoeb Raseed Shaikh	https://www.linkedin.com/in/ishoebshaikh
Durgesh Patil	https://www.linkedin.com/in/durgeshpatil1999
Alok Verma	https://www.linkedin.com/in/alok-verma-098081114 https://www.uedeveloper.com/
Keyur Mehta	https://www.linkedin.com/in/keyur-mehta4455
Satyam Jadhav	www.linkedin.com/in/satyam-jadhav-19a900242

Name	Links
Ashutosh Raval	https://www.linkedin.com/in/0one-ashutosh-%E2%98%80%EF%B8%8F-b58b89137
Kartik Khurana	https://www.linkedin.com/in/kartik-khurana-878739175
Dhruvin Shah	https://www.linkedin.com/in/dhrruvin/
Patel Riya	https://www.linkedin.com/in/riya--patel
Dharmishtha Mandhalkar	https://www.linkedin.com/in/dharmishtha-mandhalkar-24057820a
Vishal Vishwakarma	https://www.instagram.com/rootxvishal/
Sachin Kalkumbe	https://www.linkedin.com/in/sachin-kalkumbe-462824201
Saransh Saraf (MR23R0)	https://www.linkedin.com/in/saransh-saraf-2b514b20b/
EZOUINE ACHRAF	
Bikash Kumar Prasad	https://www.linkedin.com/in/bikash-prasad-b2b0b41a5/
Hydrogen	https://twitter.com/bikz21
Pavan Saxena	https://www.linkedin.com/in/pavan-saxena2506
Younghun Lee ⌧⌧⌧	https://www.linkedin.com/in/younghun-lee-2407b1113/
Sidhu Mossewala	https://www.linkedin.com/in/ritik-jangra-03b80a21b
Yash Kushwah (@cyberyash951)	https://www.linkedin.com/mwlite/in/yash-kushwah-a80449229
Milan Jain (Scriptkiddie)	https://www.linkedin.com/in/milan-jain-scriptkiddie-50a738213
Yogesh Bhandage	https://in.linkedin.com/in/yogesh-bhandage
Heidar Zeinalli	https://www.linkedin.com/in/heidar-zeinalli-421313275
K.Rajesh Sagar	https://www.linkedin.com/in/rajesh-sagar-95619524b
Abhinav Bansal	https://www.linkedin.com/in/abhinav-bansal-027307202
Satyam Jadhav	www.linkedin.com/in/satyam-jadhav-19a900242



Knowledge base backup

Last Modified on 07/26/2024 2:14 pm EDT

Do I need to back up my knowledge base?

If you're asking because you want a backup in case KnowledgeOwl itself has an issue, the answer is: only out of an abundance of caution.

We take a complete backup of our systems daily, stored in two separate geographic locations, and we have a disaster recovery process. In the event of a true catastrophe on our side, we would restore all customer knowledge bases from one of these backups. For most customers, this disaster recovery process is sufficient, but check with your information security officer or team to be sure. Refer to Security and reliability for more information on our data center security and data protection policies.

If you're asking because you have compliance or other security measures requiring you to store a backup yourself, the answer is probably yes, take your own backups.

You can back up your knowledge base in two ways:

1. Use the HTML Zip export to take an exported copy of the HTML in your knowledge base and the files referenced in that HTML.
    a. This export is usually sufficient for compliance purposes, though you may want to take a sample export and share it with your information security officer or team to verify.
    b. Note that this export includes a lot of the HTML templates and wrappers we use to make your knowledge base display the way it does.
2. Craft your own backup using the API.
    a. For article backup, use the List articles endpoint to get an export of all the HTML for your articles.
    b. The articles endpoint doesn't include screenshots and files referenced by articles, snippet content, or article version history. Consider including other endpoints in your backup, such as snippet, file, articleversion, and so on.

Can I import my export to a new knowledge base?

No. KnowledgeOwl doesn't currently support importing an exported knowledge base. But if it's a feature you'd like to have, contact us and request it!

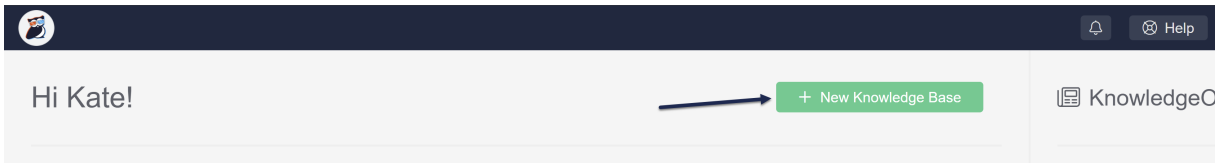
Create an additional knowledge base

Last Modified on 08/28/2024 5:39 pm EDT

You can have more than one knowledge base on your account. Content can be synced across knowledge bases, but settings (including theme), libraries (files & snippets etc) and reporting is all kept separate for each knowledge base.

To add a new knowledge base:

1. Go to your dashboard by clicking on the owl in the top left of the navigation bar or clicking on your **profile icon/name** and selecting **Knowledge Bases** from the dropdown.
2. Select the **+ New Knowledge Base** button there:



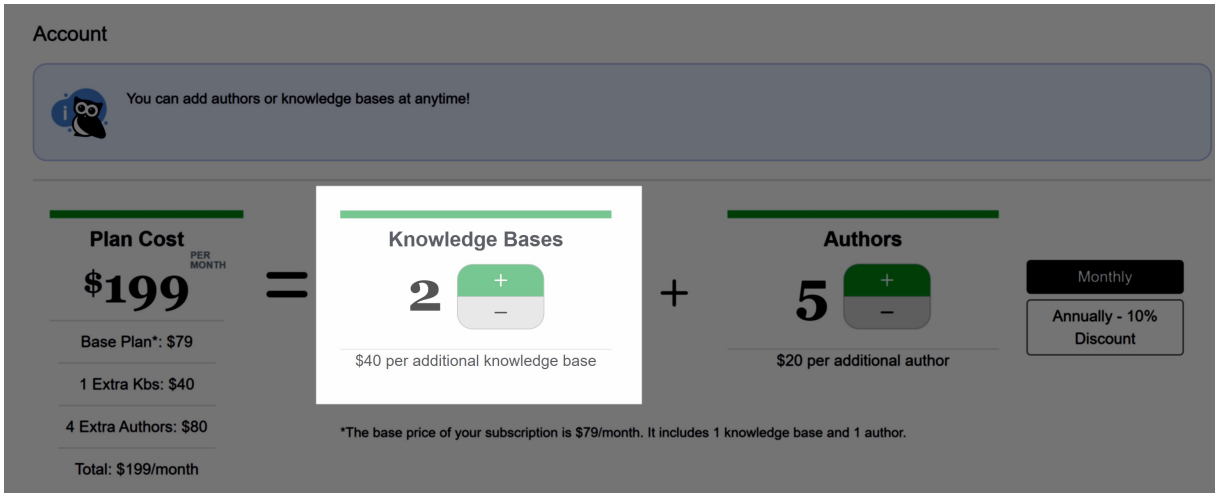
3. This will open a pop-up that will prompt you for some details about the knowledge base. Follow the instructions.

If you don't see the option to add a new knowledge base, you don't have another knowledge base slot available on your account, so you'll need to add one:

If you pay via invoice, contact us to add another knowledge base.

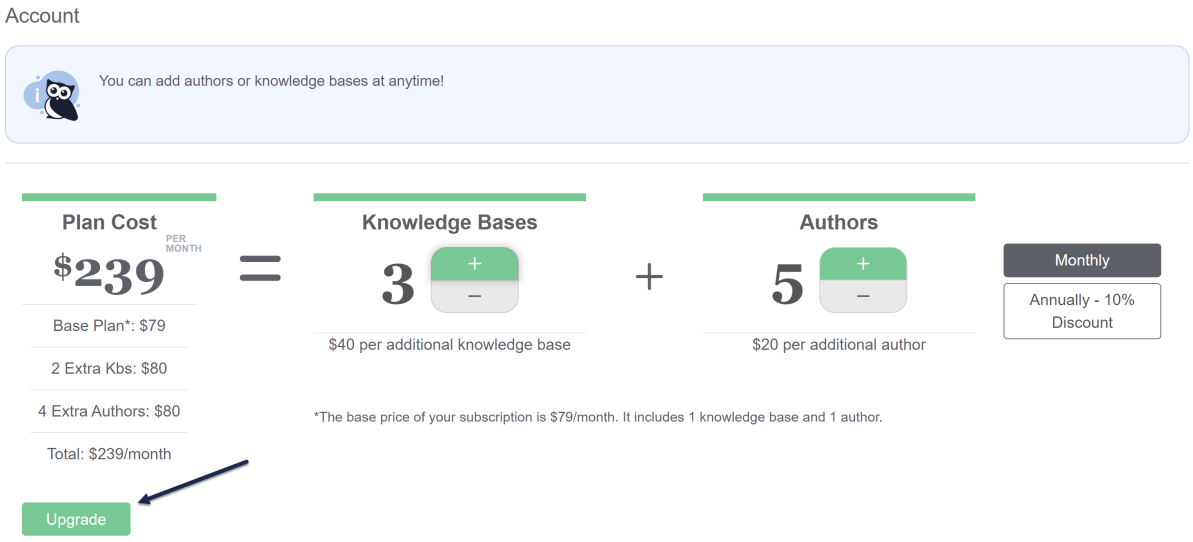
If you pay via in-app credit-card, you can add additional knowledge bases to your account at any time. To do so:

1. Click on your **profile icon/name** in the upper right.
2. Select **Billing** from the dropdown.
3. The **Knowledge Bases** number controls the number of knowledge bases in your account. Use the + and - controls to adjust the number of knowledge bases to your desired total.



4. As you toggle, you'll see the overall Plan Cost price adjust. Don't worry--we aren't charging you, we just want you to see how the new knowledge bases will affect your overall costs.

5. Once you've adjusted the Knowledge Bases, an **Upgrade** button will appear in the **Plan Cost** section, just below the cost summary. Click this button to save your changes to the number of Knowledge Bases (or Authors).



6. We will charge the card on file for the new knowledge base, and the knowledge base slot becomes available in your account.

7. Head to the dashboard by clicking the owl in the upper left and create a new knowledge base there. Be sure you assign at least one author to the new knowledge base!

Copy a knowledge base

Last Modified on 08/28/2024 5:41 pm EDT

If you have room on your account, you can create a copy of an existing knowledge base for a variety of purposes: testing/troubleshooting, translating, new versions of software, and as a template.

The following items will NOT copy over:

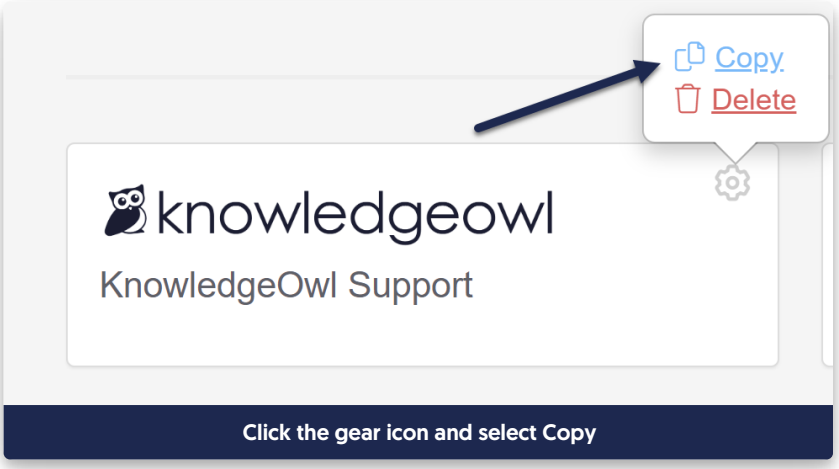
- File library and labels (all images and files in the content of the new, copied knowledge base will link to the original source knowledge base's file library)
- Synonyms
- Revisions
- Related Articles
- Shared content relationships (though the articles/categories will be copied in full, just no longer linked) See Synced content in copied knowledge bases for steps in how to audit and re-create shared content
- Articles' date created (though date modified and date published will)

To copy your knowledge base:

1. Go to your **profile icon/name** in the upper right and select **Knowledge Bases** or click on the little owl in the top left of the navigation bar to get to the site dashboard.
2. Click on the gear icon in the top right of the knowledge base you want to copy.

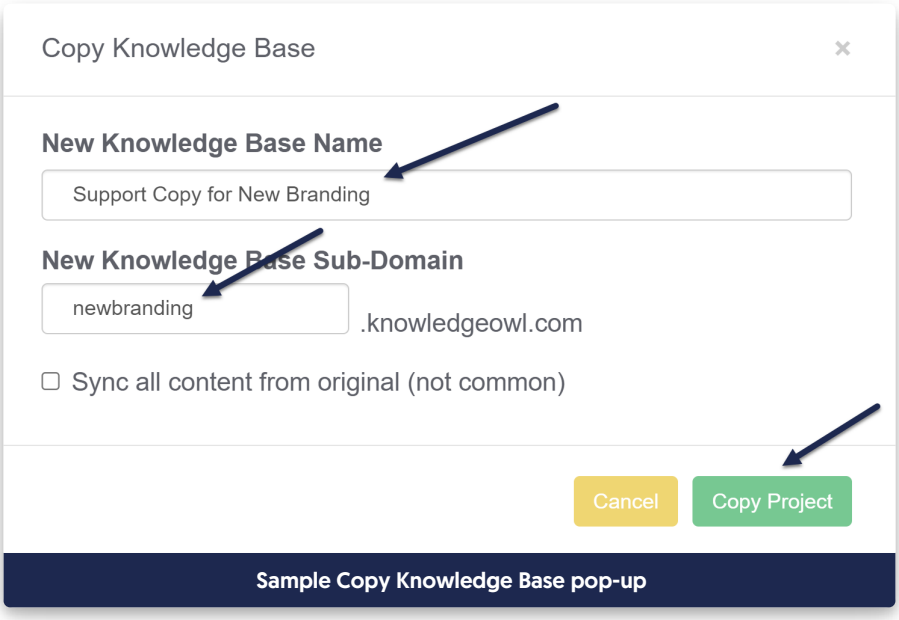
   If you do not have a gear icon, you do not have permission to copy a knowledge base. Contact your knowledge base administrator. If you see the gear but don't see the **Copy** option, your account does not have any available knowledge bases and you'll need to upgrade your subscription to make a copy.

3. Select **Copy**.



If you do see the gear cog but don't see Copy, you probably don't have any available knowledge base slots to put a copy into. See Creating an additional knowledge base for more information.

4. Give the copy a new name and URL. Leave the option to sync all the content unchecked unless you are sure you want to do this (see below).



Sample Copy Knowledge Base pop-up

5. Select **Copy Project.**

You'll see a progress bar while the knowledge base is copied--larger knowledge bases take longer to copy. You'll receive a confirmation message once the copy is complete.

Once a copy exists, it will take longer for these features to become available:

- All content to be fully indexed for search: usually within 1-2 hours
- All article PDFs to be generated: these get split into small batches and run over the next 2-24 hours, depending on the size of the knowledge base

So if you view the knowledge base right after the copy finishes and search doesn't seem to be fully work an article PDF doesn't load, don't panic--this is normal!

If you've taken a copy of a knowledge base and would like to delete the original and move its files/update content links to files to the new knowledge base, please contact us to help!

What does "sync all content" do?

Sync all content will create each top-level category in your new knowledge base with the existing top-level category in the source knowledge base. This effectively synchronizes all content changes between the two knowledge bases, so that updating content in one knowledge base (such as creating or deleting articles, editing article content, and so on) will also automatically update the synced knowledge base. See Synced knowledge base for how these syncs work.

In most cases, synchronizing all content is *not* the option you want to choose when copying a knowledge base. All copies will take a point-in-time copy of the original source knowledge base. If you leave "sync all content" unchecked, the two knowledge bases remain independent moving forward: edits to one will not impact edits to the other. Only check "sync all content" if you want the two knowledge bases to continue to mirror each other's content moving forward permanently.



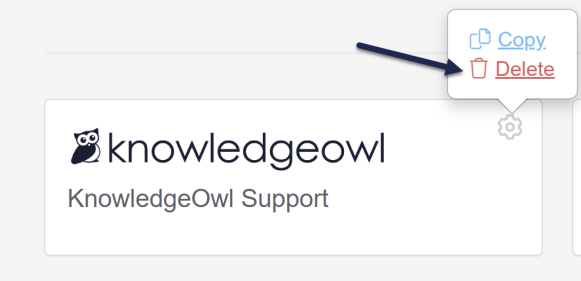
If you've accidentally synced all content and did not mean to, please contact KnowledgeOwl support to fully unlink the knowledge bases.

Delete a knowledge base

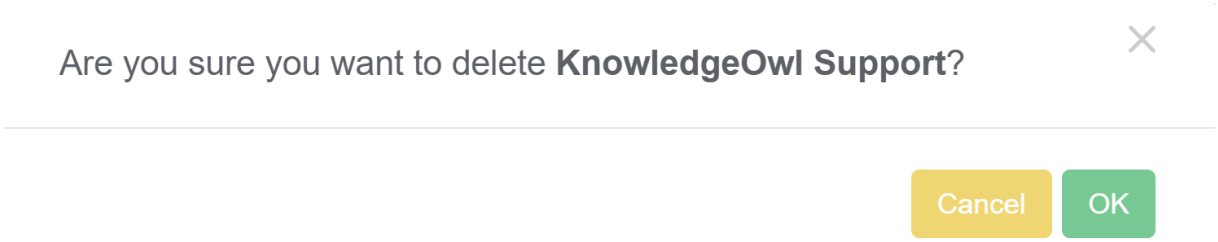
Last Modified on 08/28/2024 5:51 pm EDT

You can delete a knowledge base you are no longer using.

1. Select your **profile icon/name** in the upper right and select **Knowledge Bases** or click on the little owl in the top left of the navigation bar to go to your dashboard.
2. Select the gear icon in the top right of the knowledge base you want to delete.
3. Select **Delete**.



4. Once you select delete, a pop-up will open asking you if you're sure you want to delete the knowledge base, and list its name. Select **OK** to delete this knowledge base:



If you accidentally delete a knowledge base, please contact us for help retrieving it.

If you don't intend to use that knowledge base slot for a new knowledge base and would like to stop paying for it, see Removing an unused knowledge base slot to downgrade your account.

Remove an unused knowledge base slot

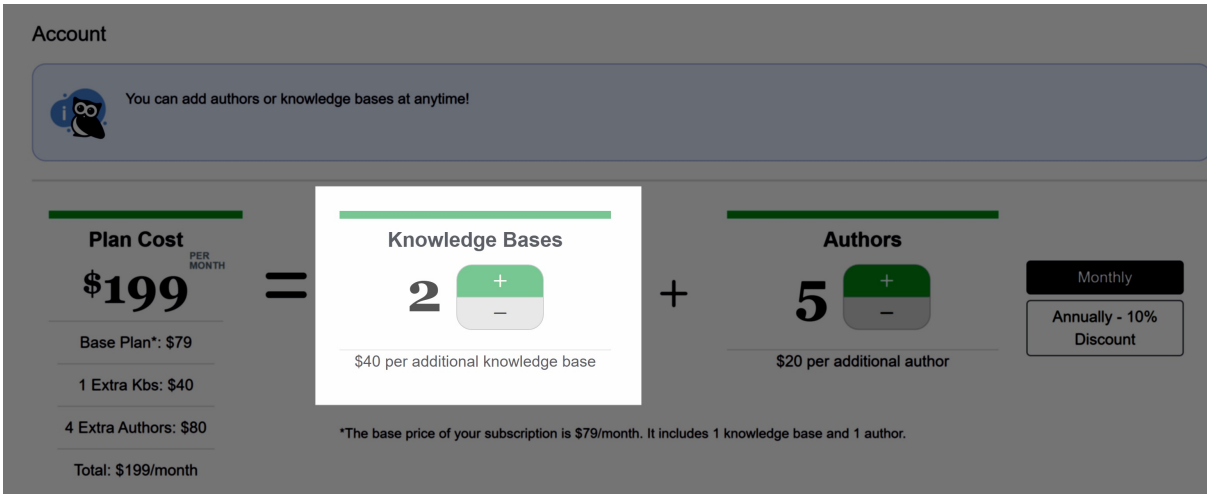
Last Modified on 08/28/2024 5:49 pm EDT

If you pay for KnowledgeOwl via invoice, please contact us to add or remove a knowledge base slot from your account.

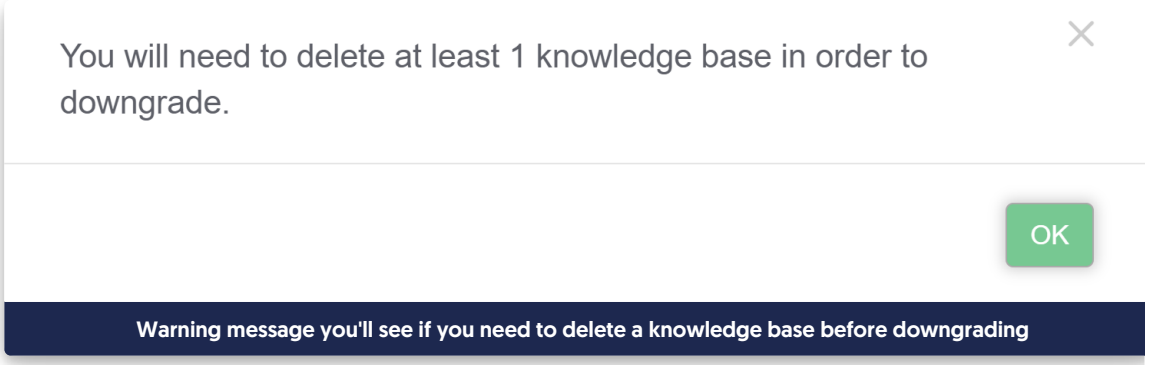
If you pay for KnowledgeOwl with a credit card entered directly in **Billing**, you can add or remove knowledge bases yourself, at any time. We'll automatically charge a prorated amount (for an upgrade) or prorate a credit (downgrade) and adjust your upcoming payments based on the changes you make. Refer to Creating an additional knowledge base for adding knowledge bases.

To remove a knowledge base you aren't using:

1. Click on your **profile icon/name** in the upper right.
2. Select **Billing** from the dropdown to view your account details.
3. The **Knowledge Bases** number is the number of knowledge bases available to your account. Use the + and - controls to adjust the number of knowledge bases to your desired total.



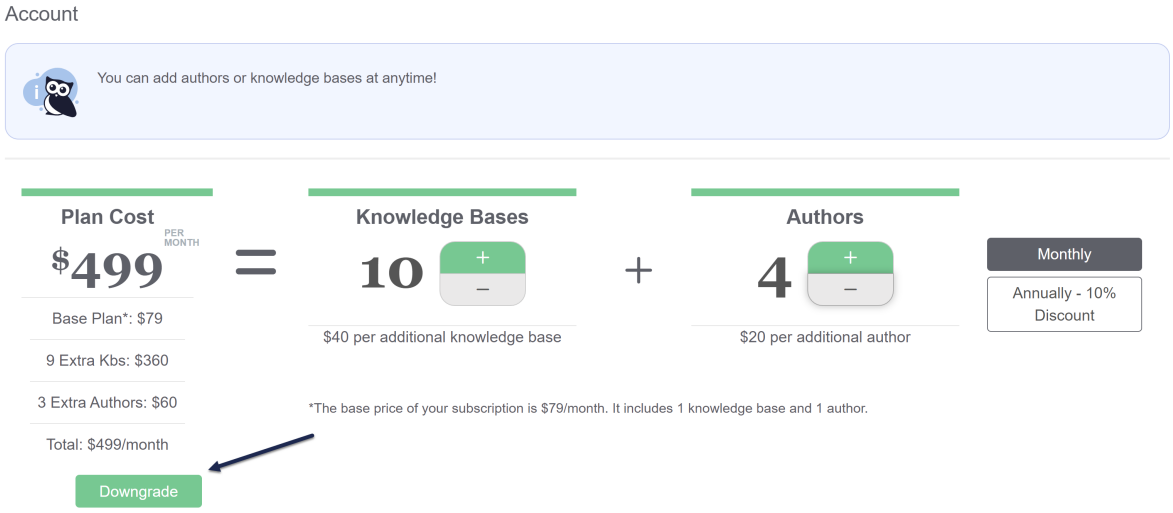
   - If you try to remove a knowledge base but are currently using all knowledge base slots, you'll see a warning telling you that you'll need to delete at least xx knowledge bases in order to downgrade:



Warning message you'll see if you need to delete a knowledge base before downgrading

- If you see this warning, you'll need to delete a knowledge base from the dashboard before you can remove the knowledge base slot.

4. You can toggle the controls to see the cost of removing knowledge base slots.
5. Once you've made changes to remove a knowledge base, a **Downgrade** button will appear at the bottom of the **Plan Cost** section. Select this button to save your changes.



6. A pop-up confirmation window will appear, which explains that we will credit you a prorated amount for the remainder of your current subscription and will confirm your new subscription cost. Select **OK** to continue with the downgrade.
7. Once you click OK, we will remove the knowledge base slots and add the credit to your subscription.

If you have trouble doing any of the above, please contact us !

Add an author seat: in-app credit card

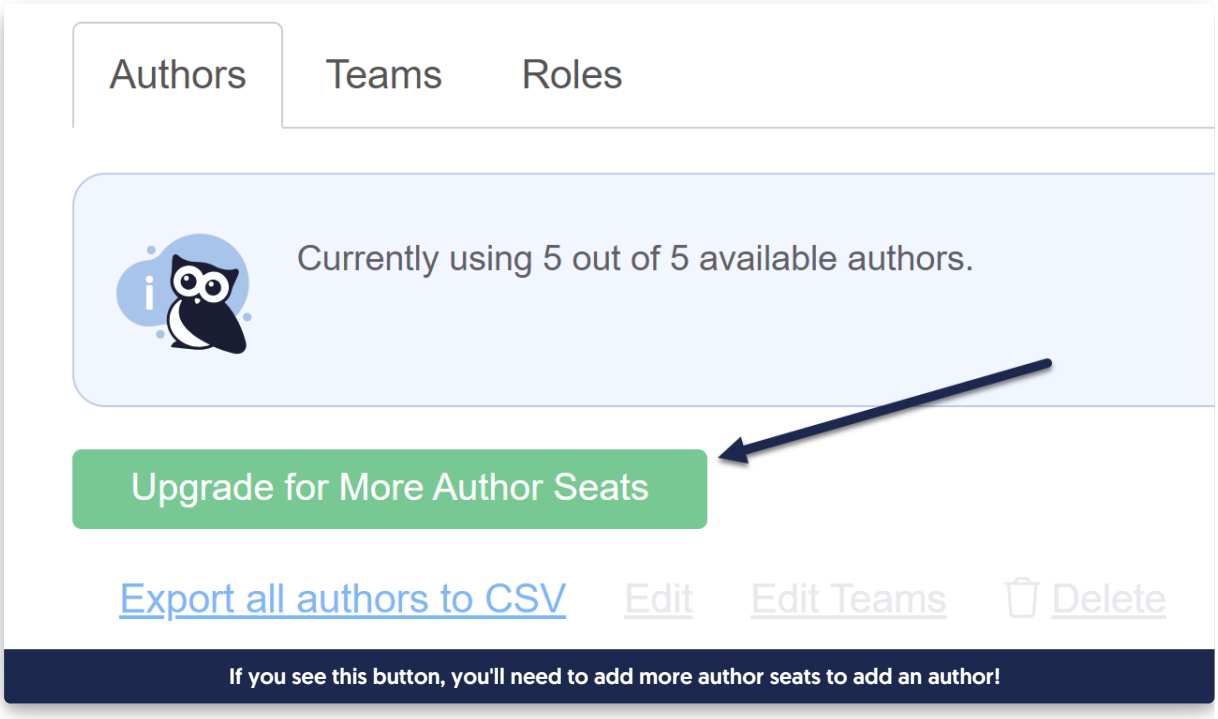
Last Modified on 08/28/2024 5:52 pm EDT

If you pay for KnowledgeOwl with a credit card entered in your **Account**, you can add or remove author seats yourself, at any time. We'll automatically pro-rate and adjust your upcoming payments based on the changes you make.

Before you add a new author seat, be sure you're using all of your current seats. (We'd hate to see you pay for something you don't need!)

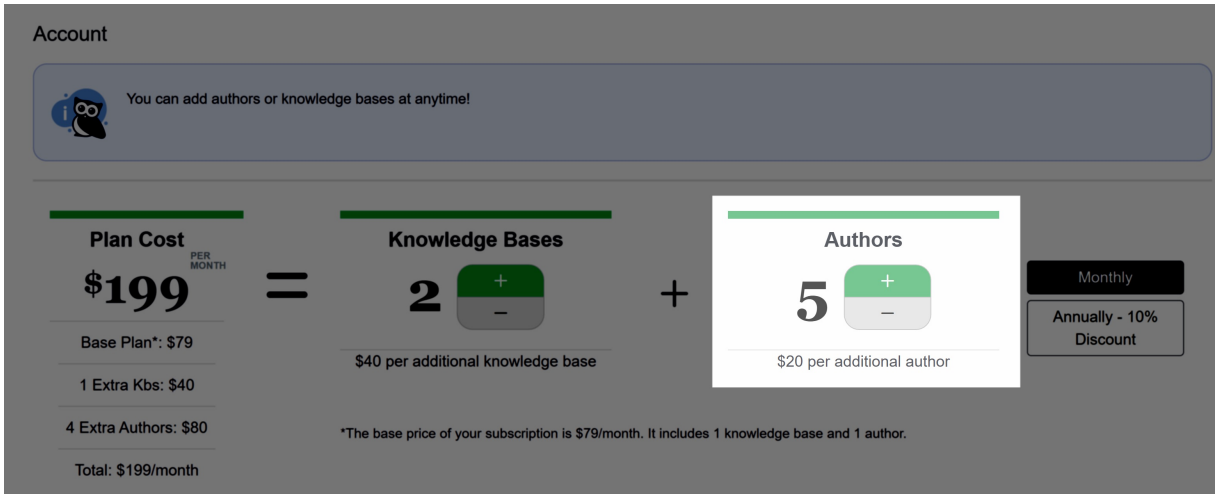
To check this:

1. Click on your **profile icon/name** in the upper right.
2. Select **Authors** from the dropdown.
3. If you see the **+ Add Author button**, you have one or more empty author seats and you can create a new author without paying for an additional seat. You can follow the directions at Add an author.
4. If you do not see a **+ Add Author** button, and instead see **Upgrade for More Author Seats**, you need to add another author seat.



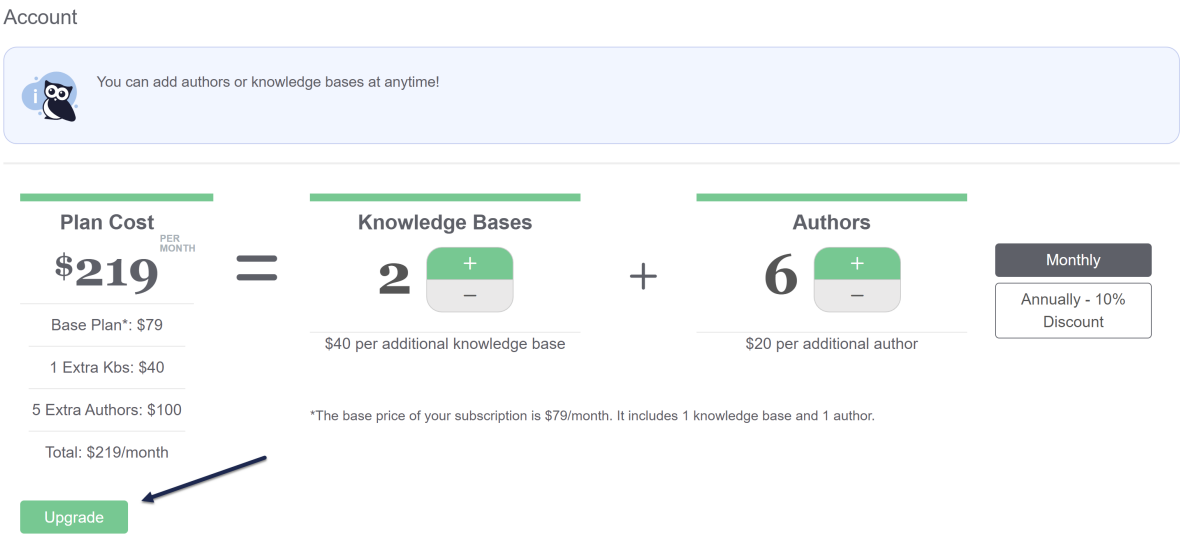
5. To add the author seat, select your **profile icon/name** in the upper right again.
6. Select **Billing** from the dropdown.

7. **The Authors number is the number of author seats available to your account. Use the + and - controls to adjust the number of author seats to your desired total.**

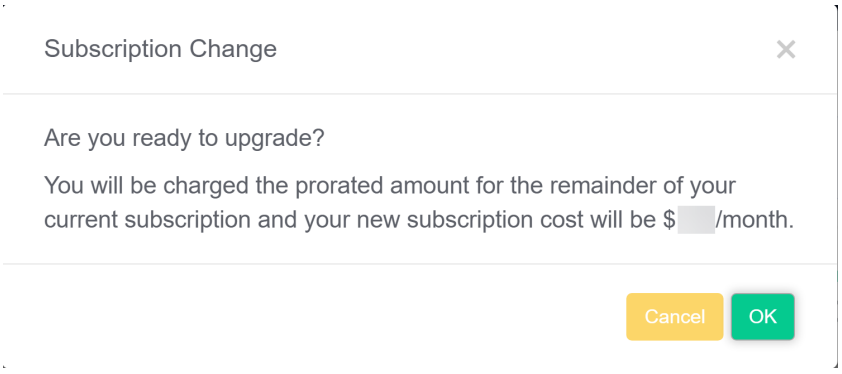


8. **You can toggle the controls to see the cost of additional author seats. Your card will not be charged yet.**

9. **Once you've made changes to add an author seat, an Upgrade button will appear at the bottom of the Plan Cost section. Click this button to save your changes.**



10. **A pop-up confirmation window will appear, which explains that we will charge you a prorated amount for the remainder of your current subscription and will confirm your new subscription cost. Select OK to continue with the upgrade and charge your card.**



11. **Once you click OK, we will charge the credit card on file. That author seat will become immediately**

available and you can head back to **Authors** to create your new author account. See Add an author for full instructions.

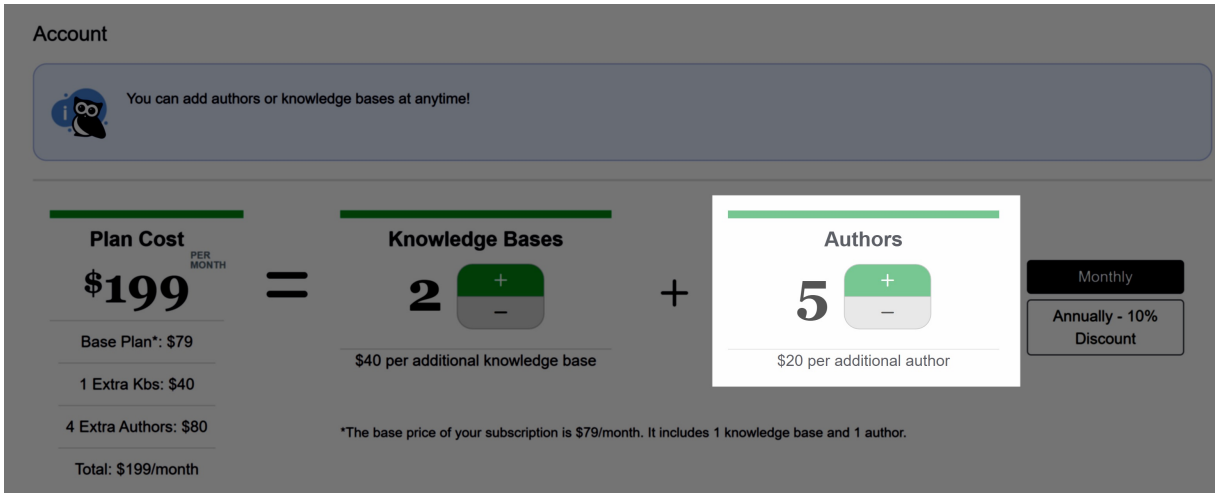
Remove an author seat: in-app credit card

Last Modified on 08/28/2024 5:44 pm EDT

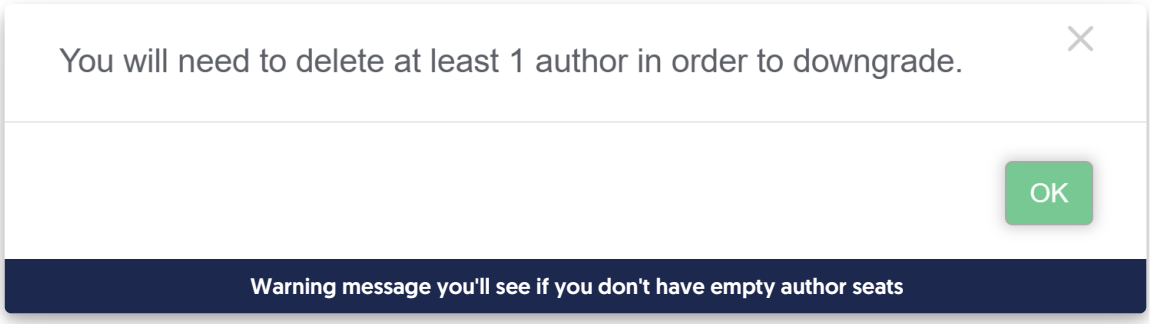
If you pay for KnowledgeOwl with a credit card entered directly in **Account**, you can add or remove author seats yourself, at any time. We'll automatically pro-rate a credit and adjust your upcoming payments based on the changes you make.

To remove an author seat you aren't using:

1. Click on your **profile icon/name** in the upper right.
2. Select **Billing** from the dropdown to view your account details.
3. The **Authors** number is the number of author seats available to your account. Use the + and - controls to adjust the number of author seats to your desired total.



   - If you try to remove an author seat but are currently using all author seats, you'll see a warning telling you that you'll need to delete at least xx authors in order to downgrade:

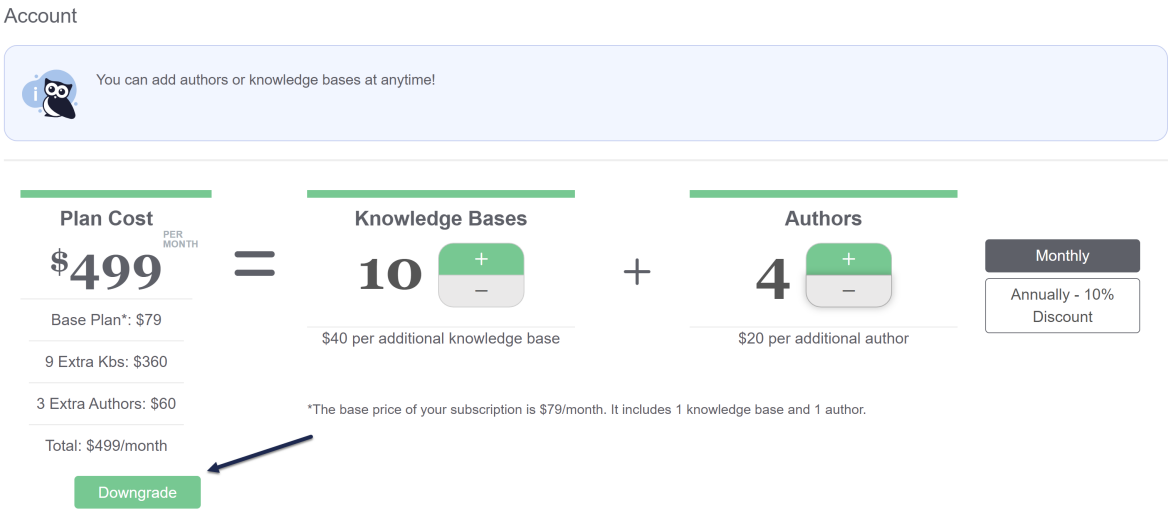


Warning message you'll see if you don't have empty author seats

   - If you see this warning, you'll need to head to delete an author from the **Authors** page before you can remove the author seat. See What happens when I delete an author? for more information.

4. You can toggle the controls to see the cost of removing author seats.

5. **Once you've made changes to remove an author seat, a Downgrade button will appear at the bottom of the Plan Cost section. Click this button to save your changes.**



6. **A pop-up confirmation window will appear, which explains that we will credit you a prorated amount for the remainder of your current subscription and will confirm your new subscription cost. Select OK to continue with the downgrade.**

7. **Once you click OK, we will remove the author seats and add the credit to your subscription.**

If you have trouble doing any of the above, please contact us !

Add an author seat: invoice

Last Modified on 08/28/2024 5:51 pm EDT

If you pay for KnowledgeOwl through an invoice, you can add author seats at any time. Please contact us with the number of author seats you'd like to add.

We will calculate:

- The prorated charge for the additional seat(s) through the rest of your current subscription term, which we will add as a separate line item to your next renewal invoice
- Adjust the total charge for author accounts on your next renewal invoice

We take this approach so that you don't have to process a separate invoice for the prorated amount before your next renewal is due. If, however, you explicitly need this as a separate invoice, let us know when you request the additional author seats.

We generally try to make these new author seats available as soon as we engage in the conversation.

See Add an author for instructions on creating your new author account once you have the seat added!

Remove an author seat: invoice

Last Modified on 05/29/2024 5:28 pm EDT

If you pay for KnowledgeOwl through an invoice, you can remove author seats at any time. Please contact us with the number of author seats you'd like to remove.

Be sure that you do not currently have authors assigned to the seats you'd like removed. You may need to Delete an author to free up the seat for removal. See What happens when I delete an author? for further details.

We will calculate a prorated credit for the removed seats through the rest of your current subscription term and adjust future invoices to remove the cost of those seats.

We generally add this prorated credit to your next renewal invoice.

How do I pay for my account?

Last Modified on 08/28/2024 5:44 pm EDT

There are two ways to pay for your KnowledgeOwl subscription:

- Monthly or annual credit card subscriptions (automatic billing)
- Annual invoices which can be paid by credit card, bank transfer, wire transfer, check, or PayPal (manual billing)

To activate your trial subscription by credit card:

1. Click on your **profile icon/name** in the upper right.
2. Select **Billing**.
3. Select Buy Monthly, or choose Annually and select Buy Yearly for a 10% discount. If you are a non-profit, you can check the box for a 25% annual discount.
4. Complete the payment form to activate your trial account.

After payment, you will receive a receipt via email. Each time your subscription renews, a receipt will be sent to the billing email address on file. If you choose to pay annually, you will receive a reminder email a month prior to the renewal date.

To activate your trial subscription by invoice:

- Contact us to request payment by invoice. Please specify which plan as well as how many knowledge bases and authors you want to start. We are happy to accommodate your billing process so let us know what you need (purchase orders, vendor forms, etc).
- We will activate your account while we await payment.

When your subscription is up for renewal, we will send a new invoice to your billing email approximately a month prior to the renewal date.

Switching payment options

Contact us to switch from a credit card subscription to invoicing or vice versa. If you wish to switch to invoices, we will cancel your automatic credit card subscription and send you an invoice due on your next renewal date. If you wish to switch to automatic billing, we will switch your account back to a trial so you can upgrade to a credit card subscription or we can set up the subscription over the phone.

What types of discounts are available?

Last Modified on 08/28/2024 5:50 pm EDT

The following discounts are available for annual subscriptions:

- 25% off annual subscriptions for non-profit organizations
- 10% off annual subscription for all other organizations

These discounts can both be accessed in your **Billing** (accessible by selecting your **profile icon/name** in the upper right and selecting **Billing**).

The 10% annual discount is automatically applied when paying via credit card in the application. To get the 25% non-profit annual discount, check the box confirming you are a non-profit prior to paying. If you forgot to check the box, contact us so we can fix your subscription and apply a credit to your account.

When paying by invoice, we will automatically apply the 10% discount. Please let us know if you qualify for the 25% non-profit discount when requesting an invoice.

How do I update my credit card?

Last Modified on 08/28/2024 5:42 pm EDT

You can update your credit card in the application or over the telephone. Please do not send new credit card details by email.

To update your credit card in the application:

1. Click on your **profile icon/name** in the upper right.
2. Select **Billing** from the dropdown to access your account billing details.
3. Click the **Update Credit Card** button.
4. Input your new credit card information and save.

Your credit card will only be charged if you have an outstanding invoice due from a previous failed payment. The new credit card will be used for payments moving forward on your renewal date.

You must be an account admin to access the **Billing** menu from your **profile icon/name** in the upper right to update the credit. If you are not, we can help you update your credit card over the phone.

To update your credit card over the phone:

- Give us a call at (303) 566-7131.
- contact us to request a callback.
- Schedule a time to resolve the payment on a call.

How do I add or remove knowledge bases?

Last Modified on 11/18/2024 1:42 pm EST

Refer to Add and remove knowledge bases for detailed instructions for your billing type.

How do I add or remove author seats?

Last Modified on 11/18/2024 1:42 pm EST

Refer to Add and remove author seats for detailed instructions for your billing type.

Where can I access my past receipts and invoices?

Last Modified on 05/29/2024 5:28 pm EDT

Invoices and receipts are sent by email to the billing email address on file. We do not currently have a place to access them online.

To request copies of past receipts or invoices, please contact us . We can resend receipt emails as well as attach copies.

How can I change the billing email address for my account?

Last Modified on 08/28/2024 5:51 pm EDT

Receipts are automatically emailed to the current billing email address, and past receipts are available upon request.



You must be an account admin to change the billing email. If you aren't an account admin but do want to update the billing email, contact us and we can update the billing email for you.

To update your billing email, you can:

1. Click on your **profile icon/name** in the upper right.
2. Select **Billing** from the dropdown to view your account details.
3. In the **Account Info** section, update the billing email.
4. Be sure to select the **Update Account Info** button at the bottom to save the change.

All future billing emails will be sent to that address!

Switch from monthly to annual billing

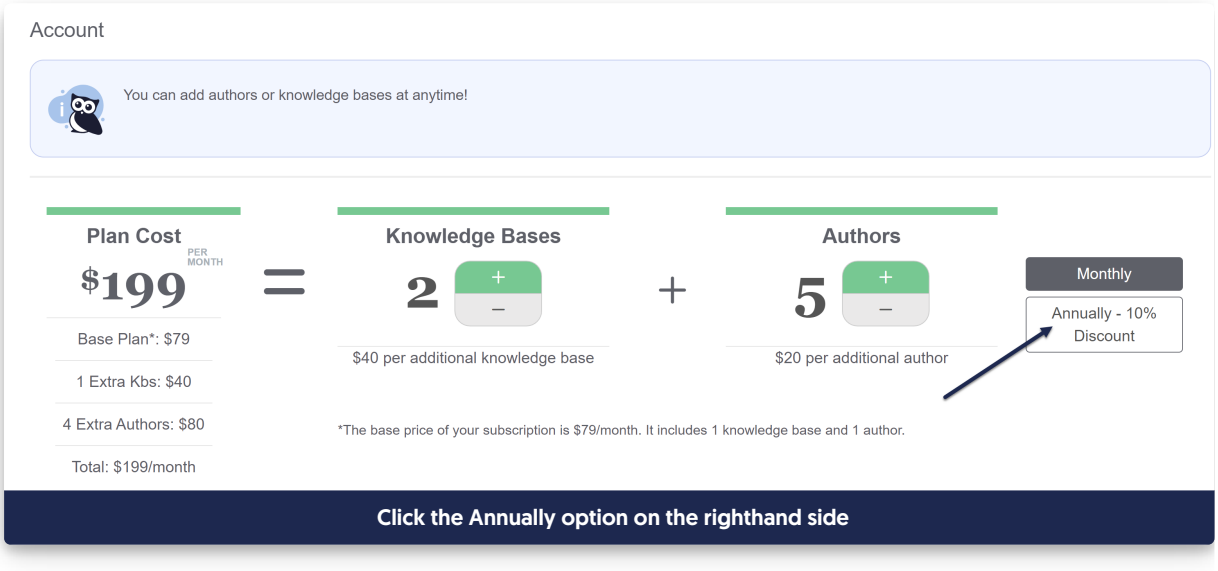
Last Modified on 08/28/2024 5:43 pm EDT

How do I make the change?

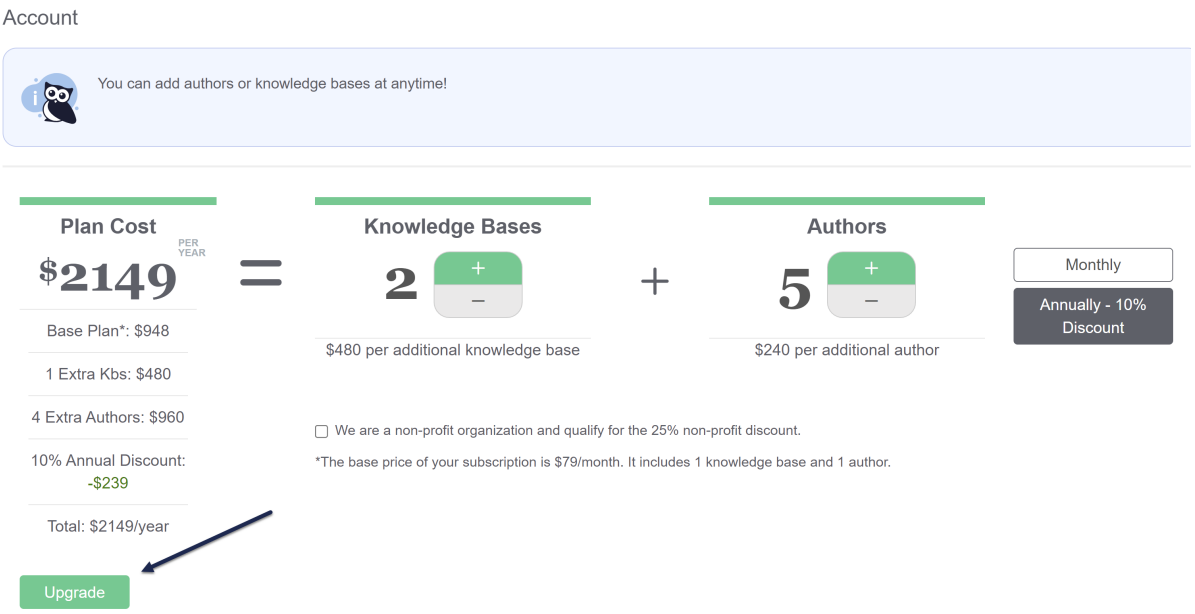
You will only be able to switch from monthly to annual billing if you have Full Admin privileges on your account. If you don't see the **Account** option in your **profile icon/name** dropdown, you are not an Admin. Contact an Admin author on your account to switch from monthly to annual billing.

You can switch from monthly to annual billing at any time. To do so, once you're logged into app.knowledgeowl.com:

1. Click on your **profile icon/name** in the upper right.
2. Select **Billing** from the dropdown to view your account details.
3. The credit card displayed here is what we'll charge for the annual subscription, so be sure you have the correct credit card info added before you follow these steps.
4. On the right hand side, toggle from “Monthly” to “Annually - 10% discount”.



5. Once you select Annually, the Plan Cost information will update to show your yearly cost (with the discount), and an **Upgrade** button will appear below the **Plan Cost**.
6. If you are a non-profit organization, you can check the box to receive a 25% annual discount. ☺
7. Click the **Upgrade** button to finalize the change.



8. A confirmation pop-up will appear which will show your yearly total. The actual amount charged may be less than this total if you are part-way through your billing month (please see "**If I switch to annual, how soon will I be billed?**" below).

If I switch to annual, how soon will I get billed?

Right away! If you choose to switch from monthly to annual billing, you will be charged immediately for a full year of service with a 10% discount. However, if you are part-way through a month of service that you've already paid for, our system will generate a prorated refund for the unused time on the monthly charge, and offset that against the annual charge.

Will I be billed for a full year from today's date?

You will be billed for a full year from the date you make the switch, and that date will become your new annual renewal date. You will be charged for an additional year of service each year on that date.

Is the 10% discount one-time or recurring?

Once you've made the switch, it's all yours! You will continue to receive a 10% discount for as long as you stay on an annual plan. If you move away from annual billing, you will no longer be eligible to receive the 10% discount.

Can I switch back to monthly at a future date?

Absolutely! Please email us at billing@knowledgeowl.com if you would like to switch back to a monthly subscription. If you choose to switch back from annual to monthly billing, our system will generate a prorated refund for the unused time on the annual charge. That can be held in credit on your account, or refunded back to your payment method, whichever you prefer.

However, keep in mind that if you switch back to monthly billing you will no longer be eligible to receive the 10% discount.

If I switch to annual, am I locked in for a full year?

No matter whether you subscribe to monthly or annual billing, you are free to cancel your account at any time.

See Cancel my account for full cancellation steps.

What are my payment options?

If you switch from monthly to annual billing, your annual charge will be made to the same card you have registered on your account for your monthly payments. We also offer invoiced billing - see below for details.

Can I pay by invoice?

Yes! We offer payment by invoice on all annual accounts. Please email us at billing@knowledgeowl.com to request the switch.

Can I pause or suspend my subscription?

Last Modified on 05/29/2024 5:28 pm EDT

We understand projects get put on hold. If you need to pause or suspend your account without cancelling, please contact us to let us know what you need. We are happy to help in any way we can!

Cancel my account

Last Modified on 08/28/2024 5:42 pm EDT

While we'd hate to have you go, you can cancel your subscription at any time.

Prior to cancellation, you can export your content in various formats:

- Full PDF download
- Custom PDFs
- HTML zip file
- API

As soon as you cancel, all access to all of your KBs will end and any API keys for the account will stop working, so please be sure you've taken any exports you need and/or disabled any integrations or jobs you have that use those API keys before cancelling!

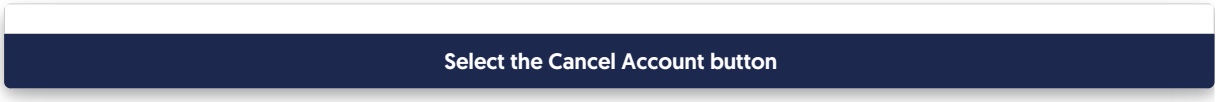
To cancel your subscription

You must be a Full Admin in order to cancel your subscription.

If you are paying for your subscription via invoice, contact us about canceling.

If you're paying for your subscription via in-app credit card:

1. Select your **profile icon/name** in the upper right.
2. Select **Billing** from the dropdown to view your account details.
3. Select the **Cancel Account** button in the **Current Subscription Info** section.



4. This will open a Cancel Account pop-up. Select the Reason for cancelling. We appreciate your feedback in providing a reason, since this helps us know where we can improve!



5. Once you've selected your reason for cancelling, select the **Cancel My Account** button.
6. Once cancelled, you will be logged out and your account will no longer be accessible.

Upon cancellation, your account will be scheduled for permanent deletion in 60 days. You will be able to

reactivate your subscription during that 60 day period without losing anything. After 60 days, you will need to create a new account.

Delete your data

Once you've canceled your account, you can request that we purge all of your account data as soon as you'd like. When you request this, we'll delete:

- All content in your knowledge base, including articles, categories, snippets, tags, and files
- The email addresses of your readers and authors
- Any other data stored in your account

Basically, it will be as if your knowledge base, your readers, and your authors never existed in our systems.

To request this complete data purge, please contact us and request an immediate full account data purge.



Not recoverable
This purge removes all evidence of your account from our systems. It is not reversible. Please make sure you have exported everything you need before submitting your request!

Resolve payment

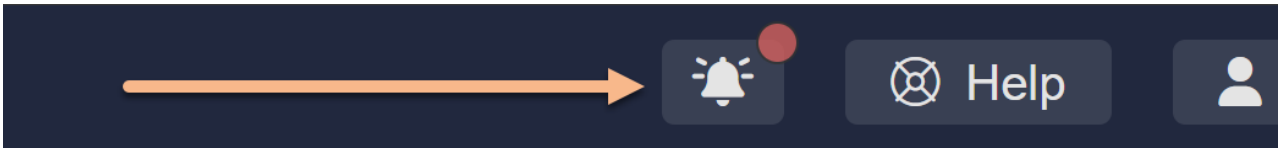
Last Modified on 08/28/2024 5:43 pm EDT

When we have not received your payment on time, we have two additional statuses we might trigger for your account:

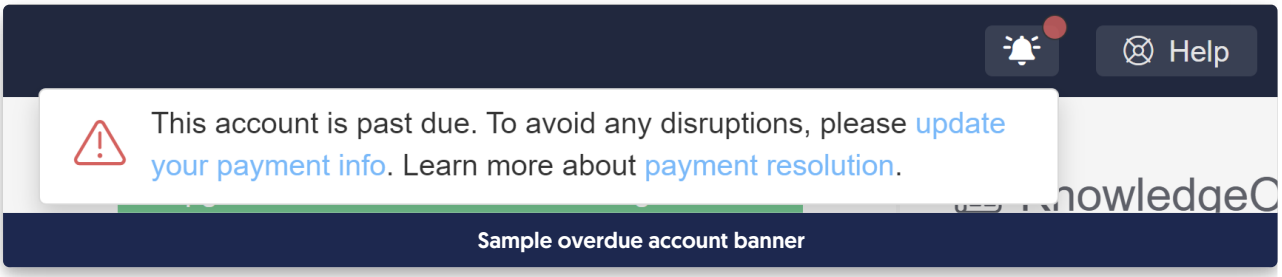
1. Overdue
2. In Arrears

Overdue

When an account is marked as Overdue, any author who logs into the KnowledgeOwl app will see a red notification dot over the notification bell in the top navigation:



Clicking on that bell will display the full alert about the account being overdue:



Sample overdue account banner

If you see this notification, it means that we have not received payment, or when we have tried to process your payment via credit card, it has failed.

Your knowledge base is still fully functioning and available when you see this message. It's just a warning that your payment is overdue.

How you resolve this depends on whether you are paying via credit card in your **Billing** or whether you are paying via invoice.

To resolve an overdue credit card payment:

1. Click the link in the banner (or click on your **profile icon/name** in the upper right and select **Billing** from the dropdown).
2. Review the credit card information and billing information we have on file and update as necessary. Specifically, please confirm:

a. The credit card has not expired (update to a new credit card if it has)

b. The card number, expiration date, and CVV are correct

c. The billing zip code is correct

d. If all of these are correct, please contact us so that our billing team can help sort out why the payments are failing.

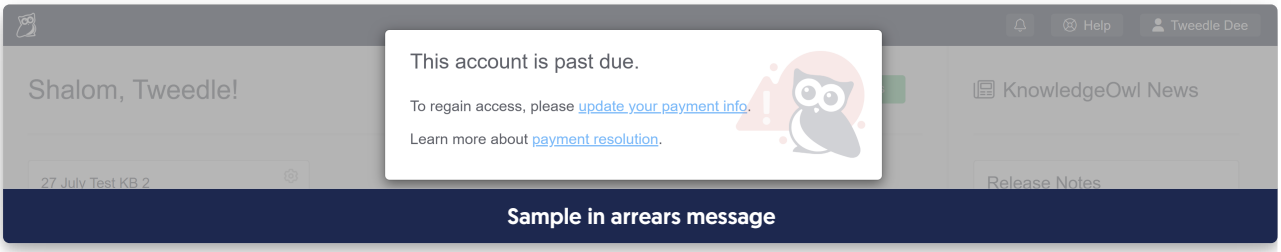
3. Once you update your credit card, we'll remove the overdue notice once we've confirmed the payment has processed.

To resolve an overdue invoice payment, please contact us with any questions so that our billing team can help.

In arrears

The "in arrears" status is used when an account is considerably past due. This is our big warning to you before we disable your account and knowledge base completely.

When an account is marked as In arrears, we will prevent all authors from taking any action within app.knowledgeowl.com by displaying a blocking message. You'll only be able to access the **Billing** page; all other pages will be disabled with this pop-up:



Sample in arrears message

Your knowledge base will still be live and accessible to your readers, but your authors are prevented from making any changes to it until we receive payment.

To resolve issues with your payment and regain author access to app.knowledgeowl.com, please contact us for all payment arrangements.

Why is an American company charging me, a non-American, sales tax?

Last Modified on 11/12/2024 3:19 pm EST

KnowledgeOwl uses a Merchant of Record for our billing. They collect and remit taxes internationally.

When you're checking out, you will need to choose your location at the top right:

This will change the currency and tax rate based on your location.

For countries like Canada, with varying tax rates/types across the country, the rate will update based on your province or territory when you add your postal code.

Under the total, you can add your company's tax ID number to be sure your tax payment is remitted properly.

If you need our Merchant of Record's tax ID for your records, you can find the ID correlating to your country or region here.

It requests a GST number of Canadians, which acts as a stand-in for HST, GST, PST or QST, since each province and territory has a different sales tax setup.

Company Website

Last Modified on 05/29/2024 5:27 pm EDT

https://www.knowledgeowl.com/

How do I contact support?

Last Modified on 07/14/2024 10:13 am EDT

Email support:

You can contact support:

- From inside app.knowledgeowl.com, in the upper right, click **Help** and then select **Contact Support**.
- From within our Support knowledge base, in the upper right, click **Contact Support**.
- Or just click this link: contact us .

Phone support:

If you need to schedule a support call with one of our owls, you can do that here: https://calendly.com/knowledgeowl-support

If you want to chat on the phone, call us and leave a regular voicemail at +1 303-566-7131.

24/7 emergency support:

If this is an emergency, you can call and leave a message on our 24/7 Emergency Owl Paging System: +1 303-566-7131

Sales support:

And if you're trying to figure out if KnowledgeOwl is a good fit for you, consider scheduling a 15-minute discovery call to talk through your needs and what we have to offer. No sales pitch, no pressure, but perhaps a few owl puns: https://calendly.com/knowledgeowl-demos/meet-with-knowledgeowl

How do I stay up-to-date on KnowledgeOwl?

Last Modified on 05/29/2024 5:27 pm EDT

Here's how you can stay up-to-date on all things KnowledgeOwl:

- Use this sign-up form to opt in to one of our mailing lists to received updates on:
  - New blog posts
  - Critical Admin Updates (retiring technology or major changes to the way KnowledgeOwl functions that might break integrations or change how you configure your knowledge base)
  - Customer research and feedback
  - Events and webinars
  - Release of new features for beta testing
  - Onboarding and education
  - Product Newsletter
  - Promotions and offers
- For site uptime and outages, as well as notice of planned site outages for server maintenance, check out and subscribe to our status page.
- Bug fixes and other releases are documented in in-app announcements and release notes, which you can subscribe to.
- Subscribe to the categories in our knowledge base that matter most to you. We will notify you of any new or updated articles in those categories.

System requirements and supported browsers

Last Modified on 05/29/2024 5:27 pm EDT

KnowledgeOwl is a web-based application that works in most web browsers. There's no need to download or install any software on your computer to use KnowledgeOwl. Since you'll be working in a web browser while using KnowledgeOwl, there are a few browser-related settings you'll need to make sure are enabled.

Compatible Browsers

- Google Chrome
- Internet Explorer 10 and above
- Mozilla Firefox
- Safari
- Edge

Browser Settings

- Make sure cookies are enabled or you will not be able to log in.
- Make sure JavaScript is enabled so you will be able to perform basic tasks in the application.

Mobile Devices

KnowledgeOwl knowledge bases are designed to be responsive and mobile optimized. The KnowledgeOwl application is not yet fully mobile responsive, so it is best to use on a desktop or a laptop.

Compatible Mobile Browsers (knowledge bases)

- iPhone: Safari
- Android: Chrome

Notes:
You'll want to make sure you're using the most recent stable release version of your preferred browser. We can't promise full support for beta or developer versions, or for browsers not listed above.
In some cases browser add-ons, extensions, or plugins can interfere with the functionality of our application. If you're seeing any unexpected behavior while working in your KnowledgeOwl account, you may want to disable these extras or try a browser without them to see if things improve.

Firewall settings

If you're accessing KnowledgeOwl through a proxy or firewall, the standard internet ports of 80 and 443 should be the only one you need to allow. If you are whitelisting KnowledgeOwl for customers with proxies or firewalls and need a full list of the domains KnowledgeOwl uses for additional services (such as file storage), please contact us for a complete list.

Troubleshooting software issues

Last Modified on 05/29/2024 5:27 pm EDT

Having trouble with the software? Here are common troubleshooting techniques that often help.

1. **Try a hard refresh.**

   Browsers store cached versions of web pages to speed up your experience. However, sometimes this causes you to view an older version of a site or application. If the site looks weird or has glitches, doing a hard refresh often can fix the problem.

   a. **Windows**: Control + F5

   b. **Apple/Mac**: Command + R or Apple + R

   c. **Linux**: F5

2. **Log out and log back in.**

   The software equivalent of turning it off and on, this is probably the most common troubleshooting technique there is. It's common because it works a lot of the time. Not successful? Try totally logging out and totally closing your browser. If you happen to leave your browser open for long periods of time, it can become very slow and cause performance issues with many sites and applications.

3. **Clear your cache and cookies.**

   Your browser stores a lot of information about your web history in cookies and cache. Over time, this can slow down your browser and, with certain sites or applications, can cause conflicts with newer versions. Sometimes it might be helpful to clear your cache and cookies to improve browser and application performance.

   a. Chrome: https://support.google.com/accounts/answer/32050

   b. Firefox Cache: https://support.mozilla.org/en-US/kb/how-clear-firefox-cache

   c. Firefox Cookies: https://support.mozilla.org/en-US/kb/delete-cookies-remove-info-websites-stored

   d. Internet Explorer: http://windows.microsoft.com/en-us/internet-explorer/manage-delete-browsing-history-internet-explorer

   e. Safari Cookies: https://support.apple.com/kb/PH19215

   f. Safari Cache: https://support.apple.com/kb/PH19215

4. **Try a different browser.**

Some issues may be browser specific or caused by an extension or plugin. Trying a different browser can help you narrow down what is causing a problem.

5. **Try a different computer.**

   Is it happening for you or everybody? Trying from a different computer can help you narrow down whether the issue is related to your computer or not.

6. **Try a different location.**

   Some organizations block access to certain web sites and online resources, which can cause issues for authors and readers. If the site or application works from home but not from work, you may need to get in touch with your IT department to help resolve the problem.

7. **Try from a different time or dimension.**

   If you happen to stumble across the secret to time or inter-dimensional travel, please contact us immediately and let us know how. We'd love to know the secret!

If you are still having trouble, please reach out to support. We're here to help!

KnowledgeOwl status page

Last Modified on 05/29/2024 5:28 pm EDT

KnowledgeOwl W-9

Last Modified on 05/29/2024 5:28 pm EDT

KnowledgeOwl 2019 W-9.pdf

How can I send product feedback?

Last Modified on 05/29/2024 5:27 pm EDT

Terms and conditions

Last Modified on 05/29/2024 5:27 pm EDT



Introduction

Welcome to the KnowledgeOwl web site (the "Site") operated by Silly Moose LLC ("Silly Moose," "we," "our," or "us"). Please read the following terms and conditions of service ("Terms") carefully as they contain the legal terms and conditions that you agree to when you access or use the Site and the KnowledgeOwl services provided to you by Silly Moose through the Site.

Acceptance of Agreement

"Agreement" means these Terms and any terms provided or made available to you during the ordering or registration process ("Order Process") into which these Terms are incorporated, including without limitation all pricing and payment terms. This Agreement is a legal agreement between Silly Moose and you ("you") if you are acting on your behalf or the business entity or person for whom you are acting that will be using the KnowledgeOwl Services (defined below) for any reason ("Customer") as the user of the KnowledgeOwl Services to be provided by Silly Moose under this Agreement. You and any persons that you authorize to use Customer's account may be referred to in these Terms as the "User."

If you are acting on behalf of Customer, you agree that you are an employee or agent of Customer and are entering into this Agreement for use of the KnowledgeOwl Services by Customer for Customer's own business purposes. You hereby agree that you enter into this Agreement on behalf of Customer and that you have the authority to bind Customer to this Agreement.

Silly Moose is willing to provide the KnowledgeOwl Services to Customer only on the condition that you accept all of the terms in this Agreement. By signing up for a KnowledgeOwl account you validate the Agreement, and agree to our terms of service and privacy policy. By accessing or otherwise using the KnowledgeOwl Services, you acknowledge that you have read this Agreement, understand this Agreement and that Customer agrees to be bound by all of the terms of this Agreement. You also acknowledge that registering for and creating an account on Site or your submission of the credit card payment form serves as Customer's agreement to this Agreement.

If you do not agree to the terms and conditions of this Agreement, Silly Moose is unwilling to provide or make the KnowledgeOwl Services available to Customer, and therefore, cancel and do not complete the registration process or otherwise use the KnowledgeOwl Services. If you do not accept this Agreement, Customer should immediately cease any use of the KnowledgeOwl Services.

In the case of inconsistencies between these Terms and information included in other materials (e. g. , promotional materials and mailers), these Terms will always govern and take precedence. In the case of inconsistencies between these Terms and the Order Process, the Order Process will always govern and take precedence.

1. KnowledgeOwl Services.

During the Term, and in accordance with these Terms, Silly Moose will use reasonable commercial efforts to provide Customer access to and use of the Software and other related support services described in this Agreement (such access, use and support services are referred to, collectively, as the "KnowledgeOwl Services") in accordance with any specifications set forth in the Order Process. "Software" means Silly Moose's online knowledge base tool, hosted by Silly Moose, used to facilitate Customer's use, creation and integration of online knowledge bases. The KnowledgeOwl Services may not be used to exchange social security numbers, banking, credit card, or any other financial information, federal identification information, or any sensitive information that Silly Moose deems in its sole business judgment inappropriate or risky for other users or Silly Moose's business. Silly Moose is under no obligation to provide extended customer service or consulting services as part of this Agreement.

2. Access Rights.

Subject to the terms and conditions of this Agreement, Silly Moose grants to Customer, during the Term, a non-exclusive, non-transferable right to access and use the Software and KnowledgeOwl Services as set forth in Order Process, solely to assist Customer in the processing and analysis of Customer's data. Silly Moose reserves all rights in and to the KnowledgeOwl Services not granted herein.

3. Restrictions.

a. Customer agrees that it will not, and will not allow its directors, officers, employees or agents to: (a) copy, reproduce, modify, sell, lease, sublicense, market or commercially exploit in any way the KnowledgeOwl Services or Software or any component thereof other than as expressly agreed to in this Agreement; or (b) disclose or grant access the KnowledgeOwl Services or any component thereof to any third party other than one to whom Silly Moose has consented in writing.

b. Customer agrees: (a) to use the KnowledgeOwl Services in a manner that is ethical and in conformity with community standards; (b) to respect the privacy of other users (Customer shall not seek data or passwords belonging to other users, nor will Customer or its Users modify files or represent themselves as another user unless explicitly authorized to do so by that user); (c) to respect the legal protection provided by copyright law, trade secret law, or other laws protecting intellectual property; and (d) to accept notifications of service changes, commercial email and similar offers presented through the Software system or via email.

c. Silly Moose strictly prohibits any involvement in unsolicited commercial email campaigns, commonly known as SPAM. Customer agrees and warrants that (a) it will not engage in any spamming activity in its use of KnowledgeOwl Services and (b) its use of the KnowledgeOwl Services will not violate any U. S or foreign spamming, junk mail or other related laws or regulations prohibiting or discouraging unsolicited e-mail.

4. Fees.

In consideration for providing the KnowledgeOwl Services, Customer shall pay to Silly Moose the fees set out in Order Process ("Fees"), without any set-off or deductions of any kind, as such Order Process may be amended from time to time in accordance with the terms hereof. Silly Moose shall have the right to increase the Fees at any time. Customer's continued use of the Services shall be deemed acceptance of any new Fees. Payment for the Fees shall be due and payable as specified in Order Process. Due to the nature of the technologies and Internet stability, service interruptions may occur. No full, partial, or prorate refunds will be made as adjustment for any such service interruption. Customer hereby acknowledges that changes in the nature of the KnowledgeOwl Services that may be offered under these Terms that are beyond the control of Silly Moose do not constitute grounds for any full or partial refund of any advance fees paid.

5. Taxes.

Prices set out herein are exclusive of all taxes and Customer shall pay (and Silly Moose shall have no liability for), any taxes, tariffs, duties and other charges or assessments imposed or levied by any government or governmental agency in connection with this Agreement, including, without limitation, any federal, state and local sales, use, goods and services, value-added and personal property taxes on any payments due Silly Moose in connection with the KnowledgeOwl Services provided hereunder, except for tax based solely on the net income of Silly Moose.

6. Content.

The parties agree that all disclosure and use of Content (defined below) will comply with the all applicable laws, statutes, rules or regulations, terms and conditions, and privacy policies relating to such Content. "Content" means any and all content or data (including but not limited to pictures, logos, knowledge base information, article information, article content, code embeds, CSS, Javascript, and all other content not listed here) that Customer provides to the KnowledgeOwl Software, KnowledgeOwl Materials, and/or KnowledgeOwl directly. Customer is responsible for all actions with respect to personally identifiable information of persons. As between Silly Moose and Customer, title to and ownership of all intellectual property rights of the Content shall remain exclusively with Customer.

7. Silly Moose Ownership.

Customer acknowledges and agrees that Silly Moose shall retain and own all right, title and interest and all intellectual property rights (including copyrights, trade secrets, trade-marks and patent rights) in and to the Software, KnowledgeOwl Services and all materials used by Silly Moose to provide the KnowledgeOwl Services (collectively, the "KnowledgeOwl Materials") and all copies thereof and customizations and modifications thereto, and that nothing herein transfers or conveys to Customer any ownership right, title or interest in or to the KnowledgeOwl Materials or to any copy thereof or any license right with respect to same not expressly granted herein. Customer agrees that it will not, either during or after the termination of this Agreement, contest or challenge the ownership of the intellectual property rights in the KnowledgeOwl Materials by Silly Moose.

8. Access to KnowledgeOwl Services.

Customer is responsible for obtaining all hardware, software and services, which are necessary to access the KnowledgeOwl Services including without limitation, all computers, web browsers, and services provided by an Internet service provider.

9. Customer Personnel.

Customer is responsible for establishing throughout the Term the designated point of contact to communicate with Silly Moose.

10. Right to Modify the KnowledgeOwl Service.

Silly Moose may from time to time, in its sole discretion, change some or all of the functionality or any component of the Software and KnowledgeOwl Service or make any modification for any purpose including but not limited to improving the performance, service quality, error correction or to maintain the competitiveness of the KnowledgeOwl Services.

11. Confidential Information

a. Each party ("Recipient") acknowledges that confidential information (including trade secrets and confidential technical, financial and business information of the other party ("Discloser") may be exchanged between the parties pursuant to this Agreement (collectively, "Confidential Information"). Recipient shall use no less than the same means it uses to protect its similar confidential and proprietary information, but in any event not less than reasonable means, to prevent the disclosure and to protect the confidentiality of the Confidential Information of Discloser. Recipient agrees that it will not disclose or use the Confidential Information of Discloser except for the purposes of this Agreement and as authorized herein. Recipient will promptly report to Discloser any unauthorized use or disclosure of Discloser's Confidential Information that Recipient becomes aware of and provide reasonable assistance to Discloser (or its licensors) in the investigation and prosecution of any such unauthorized use or disclosure.

b. Notwithstanding Section 11. 1, Recipient may use or disclose the Confidential Information to the extent that such Confidential Information is: (a) already known by Recipient without an obligation of confidentiality, (b) publicly known or becomes publicly known through no unauthorized act of Recipient, (c) rightfully received from a third party without any obligation of confidentiality, (d) independently developed by Recipient without use of the Confidential Information of the Discloser, (e) approved by Discloser for disclosure, or (f) required to be disclosed pursuant to a requirement of a governmental agency or law so long as Recipient provides Discloser with notice of such requirement prior to any such disclosure and takes steps reasonably necessary to maintain the information in confidence.

c. Recipient shall, and shall cause all of its employees, contractors and consultants who have access to Confidential Information of Discloser to, safeguard and maintain the Confidential Information of Discloser in strict confidence and shall not, and shall cause its employees, contractors and consultants not to, disclose, provide, or make such Confidential Information or any part thereof available in any form or medium to any third party person except to Recipient's employees,

contractors and consultants who have a need to access such Confidential Information in order to enable Recipient to exercise its rights under this Agreement. Customer agrees not to: (a) disclose to third parties (whether in writing or orally) any benchmark test data related to the KnowledgeOwl Services, and (b) use Silly Moose's Confidential Information to create any computer software or documentation that is substantially similar to the Software.

12. Right to Perform Services For Others.

Customer recognizes that Silly Moose is in the business of providing computer and information technology services and may perform services for other persons similar to Customer. Subject to Silly Moose's confidentiality obligations pursuant to Section 11, Silly Moose retains the right and nothing shall prevent Silly Moose from using any ideas, concepts, methods, processes, know-how, organization, techniques or any software, including the KnowledgeOwl Materials, in providing any services to any third party.

13. Warranty Disclaimer.

a. CUSTOMER UNDERSTANDS THAT SILLY MOOSE AND/OR THEIR ASSIGNS DOES NOT GUARANTEE OR PREDICT ANY TYPE OF PROFIT OR RESPONSE FROM THE KNOWLEDGEOWL SERVICES. ALL SERVICES ARE PROVIDED TO CUSTOMER "AS IS" AND CUSTOMER AGREES THAT IT USES THE KNOWLEDGEOWL SERVICES AT ITS OWN RISK. SILLY MOOSE EXPRESSLY DISCLAIMS ANY AND ALL REPRESENTATIONS, WARRANTIES AND CONDITIONS OF ANY KIND OR NATURE, EXPRESS OR IMPLIED, INCLUDING WITHOUT LIMITATION, REPRESENTATIONS, WARRANTIES AND CONDITIONS OF SATISFACTORY QUALITY, PERFORMANCE, MERCHANTABILITY, MERCHANTABLE QUALITY, DURABILITY, FITNESS FOR A PARTICULAR PURPOSE, TITLE AND THOSE ARISING BY STATUTE OR OTHERWISE IN LAW OR FROM A COURSE OF DEALING OR USE OF TRADE. CUSTOMER ACKNOWLEDGES AND AGREES THAT SILLY MOOSE AND THE SUPPLIERS OF SILLY MOOSE MAKE NO DIRECT WARRANTY OF ANY KIND TO CUSTOMER UNDER THIS AGREEMENT.

b. SILLY MOOSE DOES NOT REPRESENT OR WARRANT THAT: (A) THE KNOWLEDGEOWL SERVICES WILL MEET CUSTOMER'S BUSINESS REQUIREMENTS; (B) THE KNOWLEDGEOWL SERVICES WILL BE ERROR-FREE OR UNINTERRUPTED OR THAT THE RESULTS OBTAINED FROM THE USE OF THE KNOWLEDGEOWL SERVICES OR SOFTWARE WILL BE ACCURATE OR RELIABLE; OR (C) ALL DEFICIENCIES IN THE KNOWLEDGEOWL SERVICES CAN BE FOUND OR CORRECTED. FURTHER, THE KNOWLEDGEOWL SERVICES MAY BE INTERRUPTED OR UNAVAILABLE FOR THE PURPOSES OF PERFORMING MAINTENANCE OR UPGRADES.

c. SILLY MOOSE WILL NOT BE RESPONSIBLE FOR: (A) SERVICE IMPAIRMENTS CAUSED BY ACTS WITHIN THE CONTROL OF CUSTOMER OR ANY USER; (B) INOPERABILITY OF SPECIFIC CUSTOMER APPLICATIONS OR EQUIPMENT; (C) INABILITY OF CUSTOMER TO ACCESS OR INTERACT WITH ANY OTHER SERVICE PROVIDER THROUGH THE INTERNET, OTHER NETWORKS OR USERS THAT COMPRISE THE INTERNET OR THE INFORMATIONAL OR COMPUTING RESOURCES AVAILABLE THROUGH THE INTERNET; (D) INTERACTION WITH OTHER SERVICE PROVIDERS, NETWORKS, USERS OR INFORMATIONAL OR COMPUTING RESOURCES THROUGH THE INTERNET; (E) SERVICES PROVIDED BY OTHER SERVICE PROVIDERS; OR (F) PERFORMANCE IMPAIRMENTS CAUSED ELSEWHERE ON THE INTERNET.

14. Limitation of Liability

a. **FOR ANY BREACH OR DEFAULT BY SILLY MOOSE OF ANY OF THE PROVISIONS OF THIS AGREEMENT, OR WITH RESPECT TO ANY CLAIM ARISING FROM OR RELATED TO THE KNOWLEDGEOWL SERVICES, SOFTWARE OR THIS AGREEMENT, SILLY MOOSE'S ENTIRE LIABILITY, SHALL IN NO EVENT EVER EXCEED ANY OF THE FOLLOWING: (A) THE FEES PAID TO SILLY MOOSE BY CUSTOMER PURSUANT TO THIS AGREEMENT IN THE THREE MONTH PERIOD PRIOR TO THE DATE THE CAUSE OF ACTION FIRST AROSE EVEN IF THE CAUSE OF ACTION IS A CONTINUING ONE, OR (B) IN THE AGGREGATE WITH RESPECT TO ALL CLAIMS MADE UNDER OR RELATED TO THIS AGREEMENT, THE AMOUNT PAID BY CUSTOMER UNDER THIS AGREEMENT IN THE PRECEDING TWELVE MONTH PERIOD.**

b. **IN NO EVENT WILL SILLY MOOSE EVER BE LIABLE FOR SPECIAL, INCIDENTAL, INDIRECT, OR CONSEQUENTIAL LOSS OR DAMAGE, LOST BUSINESS REVENUE, LOSS OF PROFITS, LOSS OF DATA, LOSS OF COVER, DAMAGES FOR DELAY, PUNITIVE OR EXEMPLARY DAMAGES, FAILURE TO REALIZE EXPECTED PROFITS OR SAVINGS OR ANY CLAIM AGAINST CUSTOMER BY ANY OTHER PERSON, EVEN IF SILLY MOOSE HAS BEEN ADVISED OF THE POSSIBILITY OF ANY SUCH LOSSES OR DAMAGES.**

c. **SILLY MOOSE SHALL NOT BE LIABLE FOR UNAUTHORIZED ACCESS TO OR ALTERATION, THEFT, LOSS OR DESTRUCTION OF ANY DATA, EQUIPMENT OR THE KNOWLEDGEOWL SERVICES, INCLUDING WITHOUT LIMITATION THROUGH ACCIDENT, FRAUDULENT MEANS OR DEVICES, OR ANY OTHER METHOD.**

d. **SILLY MOOSE SHALL ONLY BE LIABLE TO CUSTOMER AS EXPRESSLY PROVIDED IN THIS AGREEMENT BUT SHALL HAVE NO OTHER OBLIGATION, DUTY, OR LIABILITY WHATSOEVER IN CONTRACT, TORT (INCLUDING NEGLIGENCE) OR OTHERWISE TO CUSTOMER OR ANY THIRD PARTY. THE LIMITATIONS, EXCLUSIONS AND DISCLAIMERS IN THIS AGREEMENT SHALL APPLY IRRESPECTIVE OF THE NATURE OF THE CAUSE OF ACTION, DEMAND, OR ACTION BY CUSTOMER, INCLUDING BUT NOT LIMITED TO BREACH OF CONTRACT, NEGLIGENCE, TORT, OR ANY OTHER LEGAL THEORY AND SHALL SURVIVE A FUNDAMENTAL BREACH OR BREACHES OR THE FAILURE OF THE ESSENTIAL PURPOSE OF THIS AGREEMENT OR OF ANY REMEDY CONTAINED HEREIN.**

e. Silly Moose shall not be responsible or liable for any loss, damage or inconvenience suffered by Customer or by any third person, to the extent that such loss, damage or inconvenience is caused by the failure of Customer to comply with its obligations under this Agreement.

15. Indemnification

Customer irrevocably covenants, promises and agrees to indemnify Silly Moose its affiliates and its and their officers, directors, employees, agents and assigns ("Indemnitees") harmless from and against any and all losses, claims, expenses, suits, damages, costs, demands or liabilities, joint or several, of whatever kind or nature that the Indemnitees may sustain or to which the Indemnitees may become subject arising out of or relating in any way to Customer's or your use of the KnowledgeOwl Services or Software provided or made available under this Agreement, including, without limitation, in each case attorneys' fees, costs and expenses actually incurred in defending against or enforcing any such losses, claims, expenses, suits, damages or liabilities.

16. Term and Termination.

a. **Term**

This Agreement will commence on the date you agree to this Agreement and continue on a month-to-month basis unless terminated earlier in accordance with this Section ("Term").

b. **Termination**

Customer may terminate this Agreement at any time for any reason by providing written notice to Silly Moose. Silly Moose reserves the right to suspend or terminate your account and use of the KnowledgeOwl Services and the Software, at any time, without notice, for any reason, at our sole discretion, including but not limited to the following:

i. if any check drafts authorized under this Agreement are returned unpaid;

ii. phishing attempts or schemes;

iii. if Customer is involved in the sales and/or distribution of the following materials:

    i. Cable filters;

    ii. Ponzi or Pyramid Schemes;

iv. sale and/or distribution of any illegal materials; or

v. breach of these Terms, including policies or guidelines set forth by Silly Moose elsewhere;

vi. conduct that Silly Moose believes is harmful to other users of the KnowledgeOwl Services or the business of Silly Moose or other third party information providers (including slowing down the servers and affecting other users);

c. **Effect of Termination.**

Except to the extent agreed to in writing by the parties, upon the termination of this Agreement:

i. Silly Moose shall be entitled to immediately cease providing the KnowledgeOwl Services;

ii. Silly Moose shall be entitled to immediately terminate Customer's access to the KnowledgeOwl Service;

iii. Customer shall forthwith pay to Silly Moose all amounts owing under this Agreement on the date of termination;

iv. The rights granted under Section 2 will automatically terminate;

v. Further, Customer agrees that Silly Moose shall not be liable to Customer or any third party for any termination of your access to the KnowledgeOwl Services. Silly Moose reserves the right at any time and from time to time to modify or discontinue, temporarily or permanently, the KnowledgeOwl Services (or any part thereof) with or without notice. Customer agrees that Silly Moose shall not be liable to Customer or to any third party for any modification, suspension or discontinuance of the KnowledgeOwl Services.

d. **Return of Confidential Information.**

Upon the termination of this Agreement for any reason whatsoever, each party may request of the other that all documents, information, data and/or software however recorded, which contain any of the other's Confidential Information be returned, provided that the party shall be entitled to charge a reasonable fees and materials charge for doing so. If no request is received for the return of Confidential Information within 30 days of the termination of this Agreement, the Confidential Information shall be destroyed within a reasonable time thereafter and shall not be used for any purpose whatsoever. While Silly Moose uses reasonable precautions to ensure your database is secure and protected, Customer understands and agrees that Silly Moose is under no obligation to export, extract, retrieve or 'massage' your database for Customer except through our EXPORT function.

e. **Survival.**

The parties hereto agree that the provisions hereof requiring performance or fulfillment after the expiry or earlier termination of this Agreement shall survive such expiry or earlier termination. The provisions of this Agreement relating to ownership, confidential information, warranty disclaimer, indemnification and limits of liability shall survive the expiration or termination of this Agreement.

17. Independent Contractor.

Silly Moose employees shall not be deemed at any time to be employees or servants of Customer and Silly Moose is and shall remain an independent contractor for all purposes. Unless otherwise agreed to in writing, Silly Moose does not undertake to perform any obligation of Customer, whether regulatory or contractual, or to assume any responsibility for Customer's business or operations.

18. General

a. **Notice.**

Any notice under this Agreement will be in writing and delivered by personal delivery, overnight courier, e-mail, or certified or registered mail, return receipt requested, and will be deemed given upon personal delivery, 1 day after deposit with an overnight courier, 5 days after deposit in the mail. Notices will be sent to a party at its address set forth in the Order Process or such other address as that party may specify in writing pursuant to this Section. Customer agrees to provide us with such other information relating to your use of the KnowledgeOwl Services as we deem necessary or desirable. Customer shall notify us if Customer's address, email address, telephone number, or billing information changes.

b. **Force Majeure.**

If Silly Moose's performance under this Agreement, or any obligation under this Agreement, is prevented, restricted, or interfered with by reason of: fire, flood, earthquake, explosion or other casualty or accident or act of God; strikes or labor disputes; inability to procure or obtain delivery

of parts, supplies, power, telecommunication services, equipment or software from suppliers, war or other violence; any law, order proclamation, regulation, ordinance, demand or requirement of any governmental authority; or any other act or condition whatsoever beyond the reasonable control of Silly Moose, Silly Moose shall be excused from such performance to the extent of such prevention, restriction or interference.

c. **Severability.**

To the extent that any provision, portion or extent of this Agreement is deemed to be invalid, illegal or unenforceable, such provision, portion or extent shall be severed and deleted or limited so as to give effect to the intent of the parties insofar as possible and the remainder of this Agreement, as the case may be, shall remain binding upon the parties.

d. **Assignment.**

Customer may not assign or transfer, by operation of law or otherwise, this Agreement or any of its rights under this Agreement to any third party without Silly Moose's prior written consent. Silly Moose may assign this Agreement by operation of law or otherwise to any successor to its business or assets to which this Agreement relates, whether by merger, sale of assets, sale of stock, reorganization or otherwise. Any attempted assignment or transfer in violation of the foregoing will be null and void. This Agreement shall be binding upon and inure to the benefit of the parties hereto and their respective successors and permitted assigns, and shall not confer any rights or remedies upon any person or entity not a party hereto.

e. **Trademark Information.**

Unless expressly requested in writing, we reserve the right to have fair use of your company or organization's name and logo in our promotional material.

f. **Governing Law.**

This Agreement shall be governed by and construed in accordance with the laws of the State of Colorado without reference to its conflict or choice of law rules or principles. Customer hereby submits to the exclusive jurisdiction of the courts of the State of Colorado for any legal action arising out of this Agreement or the performance of the obligations hereunder or thereunder.

g. **Counterparts.**

This Agreement may be executed in counterparts, each of which will be considered an original, but all of which together will constitute the same instrument.

h. **Headings.**

The subject headings of the articles and sections are for convenience only and shall not affect the construction or interpretation of any of its provisions.

i. **Entire Agreement; Waiver.**

This Agreement sets forth the entire understanding and agreement of the parties, and supersedes any and all oral or written agreements or understandings between the parties, as to the subject matter of the Agreement. We reserve the right to change the terms and conditions of this Agreement as needed, including, but not limited to, the right to change our subscription rates at any time. Use of the KnowledgeOwl Services by Customer after any such changes constitutes acceptance of any new terms and conditions.

If you do not agree to the new terms and conditions, you may terminate this agreement in accordance with our cancellation policy. For changes in subscription rates, we will use reasonable commercial efforts to give thirty (30) days' notice prior to changing subscription rates. The waiver of a breach of any provision of this Agreement will not operate or be interpreted as a waiver of any other or subsequent breach. In the event of a conflict between this Agreement and any other terms contained on the Site, this Agreement shall control. This Agreement sets forth the general terms and conditions applicable to all services provided by KnowledgeOwl to Customer and no terms or conditions proposed by either party, including any purchase order submitted by Customer, shall be binding on the other party unless accepted in writing by both parties, and each party hereby objects to and rejects all terms and conditions not so accepted. Customer further understands and agrees to hereby waive any purchase order terms and conditions not expressly accepted in writing by signature representatives of both parties. Customer also understands and agrees that references to purchase orders on any services invoices or otherwise shall not constitute Silly Moose acceptance of purchase order terms and conditions. To the extent of any conflict between the provisions of this Agreement and the provisions of any purchase order, the provisions of this Agreement shall govern.

30-day free trial

Last Modified on 05/29/2024 5:28 pm EDT

You can start a 30-day free trial of any plan from our website.

The trial version of the software is exactly the same as the paid version, so you have full access to all features, functionality, and support. If you choose to upgrade to a paid plan, you keep the same account so you won't lose any of the work. You can choose to continue using your trial knowledge base, or delete it and start over. Whatever works best for you.

When your trial is over, you can choose to extend it another 30 days or upgrade to a paid account. Contact us if you need to extend your trial a second time; we are happy to help in any way we can!

Unless you specifically request your account to be deleted, we keep all trial accounts for at least six months.

Can I extend my trial?

Last Modified on 05/29/2024 5:28 pm EDT

You can automatically extend your trial another 30 days when it runs out. If you've already extended your trial, contact us to let us know how much longer you need. When your trial expires, we will keep it for at least 6 months and then it will be deleted.

See How do I extend my trial? for more details.

Pricing

Last Modified on 05/29/2024 5:28 pm EDT

We try to keep our pricing as simple and transparent as possible. The price you pay is based on two things:

- Number of knowledge bases (sites)
- Number of authors (people who create and manage your content)

All features are available for all customers, including:

- Unlimited readers (people who can view your knowledge base)
- Unlimited categories and articles
- Unlimited files and images
- Unlimited file and storage space
- Unlimited views of your content

You can view current pricing on our website or contact us to discuss a customized plan. Our pricing does increase from time to time, but we will adjust your pricing gradually and notify you well in advance so you can make informed decisions.

We offer 10% discounts for annual payments and 25% off annual account for non-profit organizations.

Plans

Last Modified on 05/29/2024 5:28 pm EDT

To keep our pricing simple, we offer a single subscription plan that includes all features.

Need a guaranteed uptime SLA, priority support, or other security or legal requirements? Add our Business Extras or Enterprise Extras to get what you need!

See our pricing page for our current plan offerings.

Business Extras

Last Modified on 05/29/2024 5:27 pm EDT

Needing a little more? Our **Business Extras** add the following extras to your subscription:

Guaranteed uptime SLA

You get a 99.5% guaranteed uptime SLA.

Priority support

All customers receive responsive and owlsome customer support. Business Extras subscribers receive Priority Support.

HIPAA compliance

Are you storing information in your knowledge base that requires compliance with HIPAA? Business Extras includes a BAA Agreement (for HIPAA compliance).

Custom SSL certificates

As a Business Extras subscriber, choose between using our built-in complimentary Let's Encrypt SSL certificates or sending us your own custom SSL certificate. (Normally these are considered a Subscription add-on.)

Enterprise Extras

Last Modified on 05/29/2024 5:28 pm EDT

Needing a little more? Our Enterprise Extras adds the following extras to your subscription:

Guaranteed uptime SLA

You get a 99.9% guaranteed uptime SLA.

Dedicated account manager with priority support

All Enterprise plans will receive a dedicated account manager who serves as the primary point of contact for onboarding, escalations, training/onboarding, and account-related queries.

Enterprise customers also have priority support. Priority support requests are handled first, so you can enjoy faster response and resolution times for all inquiries.

Custom SLA / Terms of Service

Enterprise Extras offers you the option to work with us for specialized SLAs or terms of service. We cannot guarantee we will accept all custom SLAs or terms, but we will do our best to accommodate when we can.

Vendor security forms

KnowledgeOwl will complete vendor security forms, assessments, and questionnaires free of charge for our Enterprise Extras customers. (Normally these are considered a Subscription add-on.)

Custom SSL certificates

As an Enterprise Extras customer, you can choose between using our built-in complimentary Let's Encrypt SSL certificates or sending us your own custom SSL certificate. (Normally these are considered a Subscription add-on.)

Right to terminate

We want all of our customers to be happy. If you are unhappy with KnowledgeOwl for any reason or need to end your subscription, you can cancel at any time. You may contact us to request a refund for unused time on your subscription.

Priority Support

Last Modified on 05/29/2024 5:28 pm EDT

All KnowledgeOwl customers receive complimentary email and phone support. Business and Enterprise Extras customers have priority support, which means that their requests are addressed first by our team.

Enterprise customers also have a dedicated account manager.

Subscription add-ons

Last Modified on 05/29/2024 5:27 pm EDT

At KnowledgeOwl, we pride ourselves on trying to create software that just does what you need it to do. All customers have access to our amazing support team through email and our in-app help widget, as well as access to our emergency phone line.

We're often asked what we provide beyond our standard subscription plans.

We offer these subscription add-ons:

1. **Custom SSL certificates:**
    - **Plans:** Custom SSL certificates (or certs) are included for customers with Business Extras and Enterprise Extras; all other subscribers can pay for this add-on.
    - **Price:** $500 **per certificate** for customers without Extras
    - **How it works:** We offer free Let's Encrypt SSL certificates at all subscription plan levels. If you can't or don't want to use a Let's Encrypt certificate, you can pay for us to use your custom SSL certificate instead. The add-on fee is per certificate. You're welcome to send us the cert components through any method that you feel comfortable with. We'll need:
        - the SSL certificate
        - the certificate chain
        - the site key
    - **Turnaround:** These certificates generally take at least two business days to get set up once we receive them; we prefer to have at least a week to get them set up.
2. **Vendor security forms:**
    - **Plans:** Included for customers with Enterprise Extras; all other customers can add this as an add-on.
    - **Price:** $500 fee **per form** for all non-Enterprise Extras customers
    - **How it works:** If you have a vendor security assessment, form, or questionnaire that you need us to fill out, you can add on to your subscription to have our security team fill out your form. We charge per form.
    - **Turnaround:** Our turnaround times generally depend on how involved your security form is. They generally take at least 10 business days for our team to complete.
    - If you need some type of vendor security assessment but can't afford the add-on, you can check out our Consensus Assessments Initiative Questionnaire (CAIQ). This questionnaire covers a lot of the same topics as most security assessments, and we provide it free of charge!

3. **Sponsored features:**
    - **Plans:** Available to all customer accounts.
    - **Price:** Variable, based on our estimates of time and complexity, as well as our Statement of Work (SOW) negotiations.
    - **How it works:** We offer sponsored features as a way to help individual customers get functionality that might not yet be on our roadmap, but to do so in a way that makes sure our team is spending time building things that all of our customers benefit from. If there's a feature that you're really interested in seeing added to KnowledgeOwl, you can choose to sponsor that feature:
        - We'll quote you a delivery date and cost estimate, and we'll work to write a detailed SOW to guarantee that the feature meets your needs as well as those of our larger customer base.
        - You agree to the SOW and pay upfront, and our delivery timeline begins the moment we receive payment.
        - Once the feature is available, we guarantee it will continue to meet the requirements outlined in the SOW for a set period of time, and the feature becomes available to our full customer base. We may continue to build on or add to that functionality at our own discretion moving forward.
        - We only offer sponsored features for features we're already interested in doing, and we build them in a way that they benefit our entire customer base. These are not one-off or bespoke customizations, but full functionality that has gone through our full QA process and will have dedicated menu items, settings/configuration options, etc., within app.knowledgeowl.com, as appropriate.
    - **Turnaround:** Our turnaround times vary based on the feature being requested and our current roadmap. It generally takes us at least one week to provide cost and timeline estimates to start creating the SOW. Our development timeline begins once both sides have agreed to the SOW and we have received payment.

If you're interested in any of these subscription add-ons, contact us to get the conversation going!

SLA overview

Last Modified on 05/29/2024 5:28 pm EDT

Service Level Agreements (SLAs) are contracts that outline provided services, expected levels of performance, how performance is measured and approved, and/or what happens if performance levels are not met.

KnowledgeOwl only offers guaranteed uptime SLAs for our Business Extras and Enterprise Extras subscribers.

If your knowledge base is critical or you require your software to meet certain uptime/availability requirements, these extras will help offer you that guarantee and financial recourse if we don't meet your expectations.

See more details on our available guaranteed uptime SLAs below.

SLA Definitions

Last Modified on 05/29/2024 5:28 pm EDT

What is uptime?

Uptime is the percentage of total possible time KnowledgeOwl is available to you. Monthly uptime is calculated by dividing the number of minutes of downtime by the total number of minutes in the month. Visit our status page to view our current and historical uptime.

What is downtime?

Downtime refers to time when KnowledgeOwl is not available.

How is downtime calculated?

We use external server monitoring software Pingdom to monitor our servers.

SLA Exclusions

Last Modified on 05/29/2024 5:28 pm EDT

Our uptime SLA excludes performance issues caused by:

- Scheduled downtime or maintenance. We'll give you 48 hours advance notice and schedule no more than 12 hours per year.
- Factors outside of our reasonable control, aka force majeure in legalese. This includes things like acts of war, terrorism, crime, and God (hurricanes, earthquakes, floods, etc).
- Actions or inactions of a third party. This can range from things like you allowing your privately hosted domain name to lapse to a DDoS attack.
- Your services/equipment or third party services/equipment that are not within the primary control of KnowledgeOwl. This could be your own firewall preventing connection to KnowledgeOwl or an outage with KnowledgeOwl's hosting provider, Amazon Web Services.
- Suspension or termination of your right to use KnowledgeOwl in accordance with our terms and conditions. This could be the result of using your knowledge base for illegal activities such as a phishing scheme or being seriously past due on payment (more than 90 days).

Business Extras SLA

Last Modified on 05/29/2024 5:27 pm EDT

When your knowledge base is business critical, we recognize that you are taking a big risk by trusting a third party to maintain the availability and performance of your knowledge base. That's why we guarantee a 99.5% uptime for customers on the Business plan.

How it works

- We guarantee a 99.5% monthly uptime for customers with the Business Extras subscription.
- Customers can monitor our uptime on our status page and view historical data.
- If we fail to meet that level of service for any month, Business Extras customers will automatically receive a credit on their next billing cycle corresponding to the amount of downtime:
    - Less than 99.5% uptime in a given month (more than 3 hours and 39 minutes downtime) = 1 week credit
    - Less than 98.5% uptime in a given month (more than 10 hours 57 minutes downtime) = 2 week credit
    - Less than 97.5% uptime in a given month (more than 18 hours 16 minutes downtime) = 1 month credit

Refer to SLA Definitions for definitions of uptime and downtime and view the events we exclude from this policy.

Enterprise Extras SLA

Last Modified on 05/29/2024 5:28 pm EDT

Our Enterprise customers get the best SLA we can offer. We have you covered with a 99.9% guaranteed uptime and higher thresholds for service level credits.

How it works

- We guarantee a 99.9% monthly uptime for customers on the Enterprise plan.
- Customers can monitor our uptime on our status page and view historical data.
- If we fail to meet that level of service for any month, Enterprise plan customers will automatically receive a credit on their next billing cycle corresponding to the amount of downtime:
    - Less than 99.9% uptime in a given month (more than 44 minutes downtime) = 1 week credit
    - Less than 99.5% uptime in a given month (more than 3 hours 39 minutes downtime) = 2 week credit
    - Less than 99.0% uptime in a given month (more than 7 hours 18 minutes downtime) = 1 month credit

Refer to SLA Definitions for definitions of uptime and downtime and view the events we exclude from this policy.

Fair Pricing Policy

Last Modified on 05/29/2024 5:39 pm EDT

As a small company deeply connected with our customers, we understand that pricing changes can be unsettling, disruptive, and downright annoying. Regardless of how much we dislike price changes, price adjustments are sometimes necessary to continue providing our customers with exceptional service and to keep our offerings competitive and sustainable. This policy is a commitment to our customers that any KnowledgeOwl pricing updates will be fair, transparent, and in everyone's best interest.

What Drives Our Pricing Changes?

Our principle is clear: any change in pricing is anchored in enhancing the value and quality of the service our customers receive. Every six months, our pricing team takes a comprehensive look at various factors, including operational costs, market dynamics, and how we can further improve our services, to make sure our prices are sustainable and reflect the true worth of what we offer.

Our Pricing Promises

When reviewing and increasing our pricing, we commit to the following fair pricing policies:

- **Fixed Pricing for New Customers**: New customers will be guaranteed their sign-up pricing for one full year, offering them stability and assurance from the start.
- **Yearly Price Stability**: We commit to increasing our pricing for individual customers no more than once every year, ensuring predictability and stability.
- **Cap on Increases**: When we find it necessary to increase prices, we will strive to ensure that yearly price increases for individual customers do not exceed 5% or the US annual inflation rate (whichever is higher), safeguarding them from unexpected high costs.
- **Gradual Adjustment**: Should necessary overall price increases exceed the individual set cap of 5%, we will implement these increases gradually over time, allowing our customers to adapt smoothly to the new pricing structure. Gradual increases will be implemented at 5% or the US annual inflation rate per year until the current pricing is reached.
- **Price Lock-In Options**: Prior to any pricing change, customers can lock in their existing prices through 1, 2, and 3-year upfront purchases, providing them opportunities for savings and long-term price security.
- **Discounts for Yearly Payments**: We offer discounts for companies who prepay for 1, 2, or 3 year periods. The discounts for prepayments are:
  - 10% discount for 1-year
  - 15% for 2-years
  - 20% for 3-years
- **Price Lock-In Expiration**: After a lock-in period expires, the new price of the account will increase to no more than the price cap percent per year that the term was locked in for. For example, an account that was locked in for 2 years will not increase in price by more than 10% when the term expires. The customer can prepay for another term at the updated price to defer further price increases, but they cannot lock in the rate from the original term.
- **Discounts for Nonprofits, B Corps, and Purpose-driven Orgs**: Through our KO for Good program, we offer a 25% discount for companies who are nonprofits, B Corps, or otherwise purpose-driven.

- **Advance Notice**: Customers will always be provided with at least a 90-day notice before any price increase takes effect, ensuring that they have ample time to make informed decisions regarding their subscriptions.
- **Pricing for New Features**: New features or functionality might come at a cost. During the lock-in period, customers will not be forced to upgrade or pay more for additional features that were not part of the plan they signed up for. Some features or functionality might require an extra cost or an upgrade to a new plan. These will always be opt-in (not forced) choices made by the customer themselves.
- **Flexibility and Understanding**: We understand that each customer's situation is unique. While our policy outlines our standard approach, we remain flexible and open to dialogue, especially with our long-standing customers or those facing special circumstances.

These commitments are designed to maintain a balance between the need for business sustainability and growth and the importance of customer trust and loyalty.

If you have any questions or comments about our Fair Pricing Policy, feel free to reach out to us at support@knowledgeowl.com.

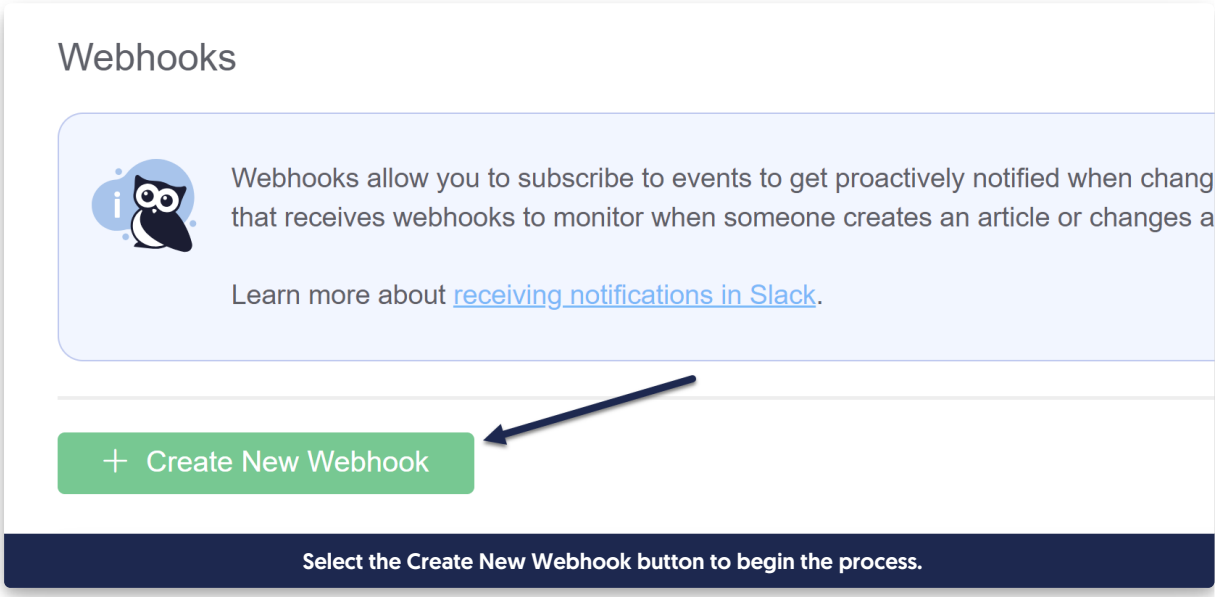
Use the KnowledgeOwl Webhooks Slack app

Last Modified on 05/29/2024 5:28 pm EDT

We're working on getting our Slack app added to the Slack App Marketplace. Until it is officially approved, it can only be installed by Slack workspace owners.

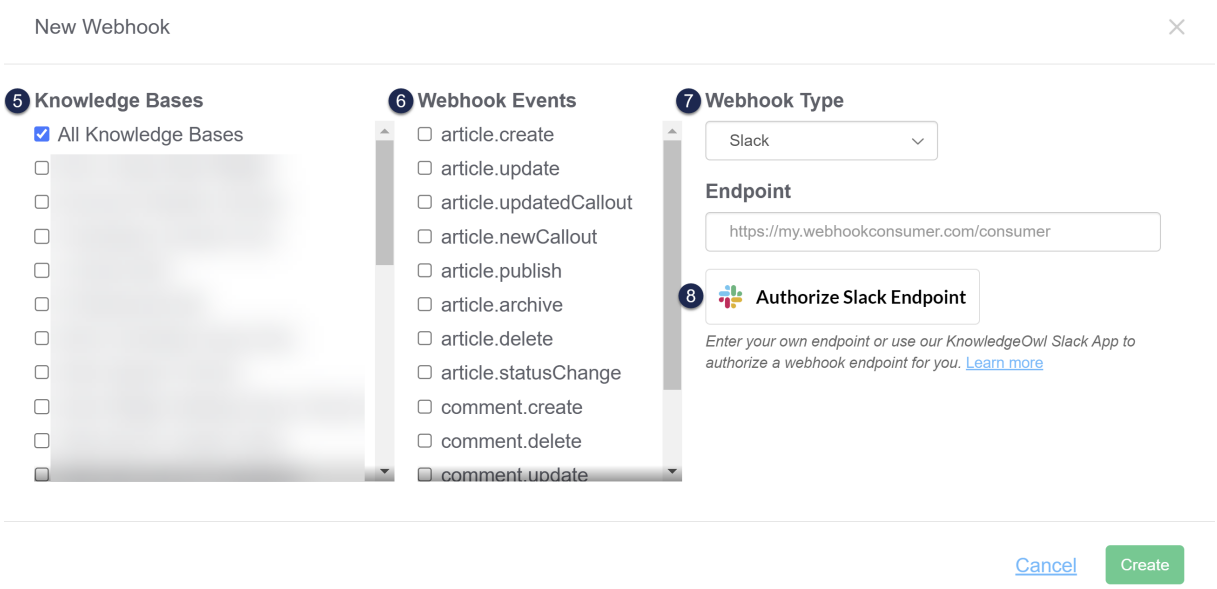
To use the official KnowledgeOwl Webhooks Slack app:

1. Click on your **profile icon/name** in the upper right.
2. Select **Webhooks** from the dropdown.
3. Select the **+ Create New Webhook** button.

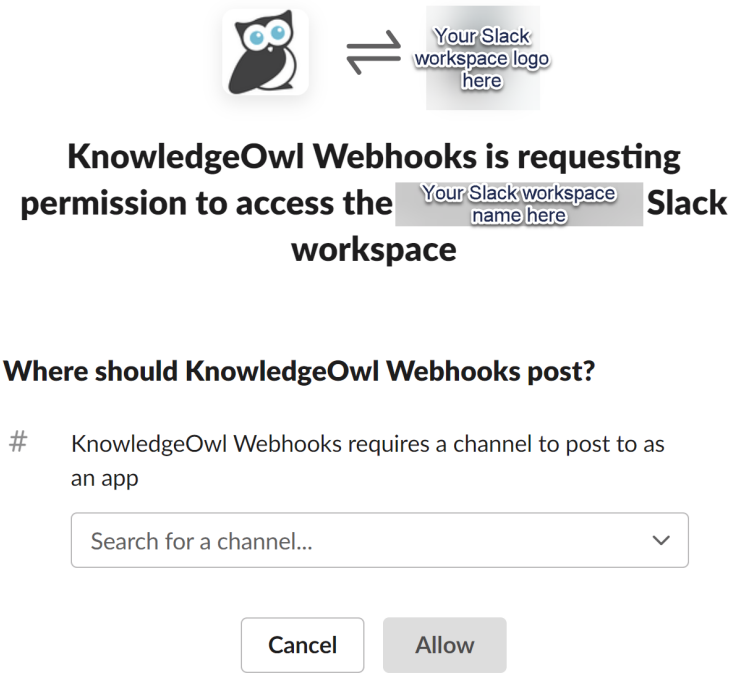


Select the Create New Webhook button to begin the process.

4. This will open a pop-up where you can configure your webhook:



5. Choose the **Knowledge Bases** you want to receive notifications about.
6. Choose the **Webhook Events** you want to receive notifications about. See Available webhook events for more details.
7. Select Slack from the **Webhook Type** dropdown.
8. Click the **Authorize Slack Endpoint** button.
9. This should open a new window asking you to authorize the app to access your Slack workspace. (If you're not logged into a workspace, you'll be prompted to log in and/or select the workspace.)

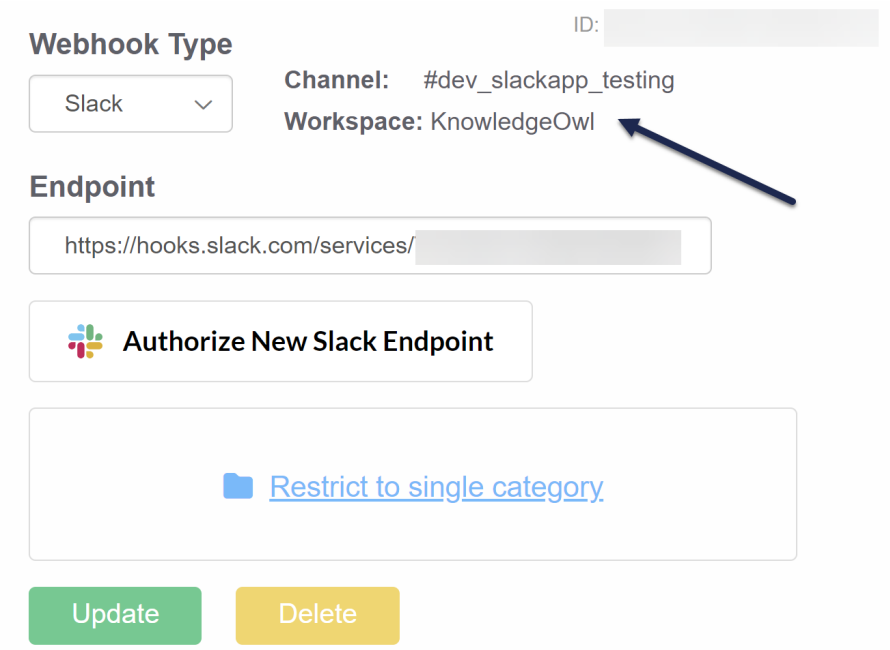


10. In that pop-up, select the channel you'd like to have the Slack App post to.

11. Then click **Allow**.

12. Once you click Allow, we'll finish the webhook creation process. You should be directed back to KnowledgeOwl, where you'll get a confirmation message that the webhook was created. You should also see a new notification in your Slack channel from the KnowledgeOwl Webhooks app saying "Webhook subscription test successful."

You can see which Workspace and Channel the Slack app is tied to in the webhook details, too:



You should now see a new Slack message appear in the designated channel whenever the selected Webhook Events occur.

Use Webhooks with Slack (build your own app)

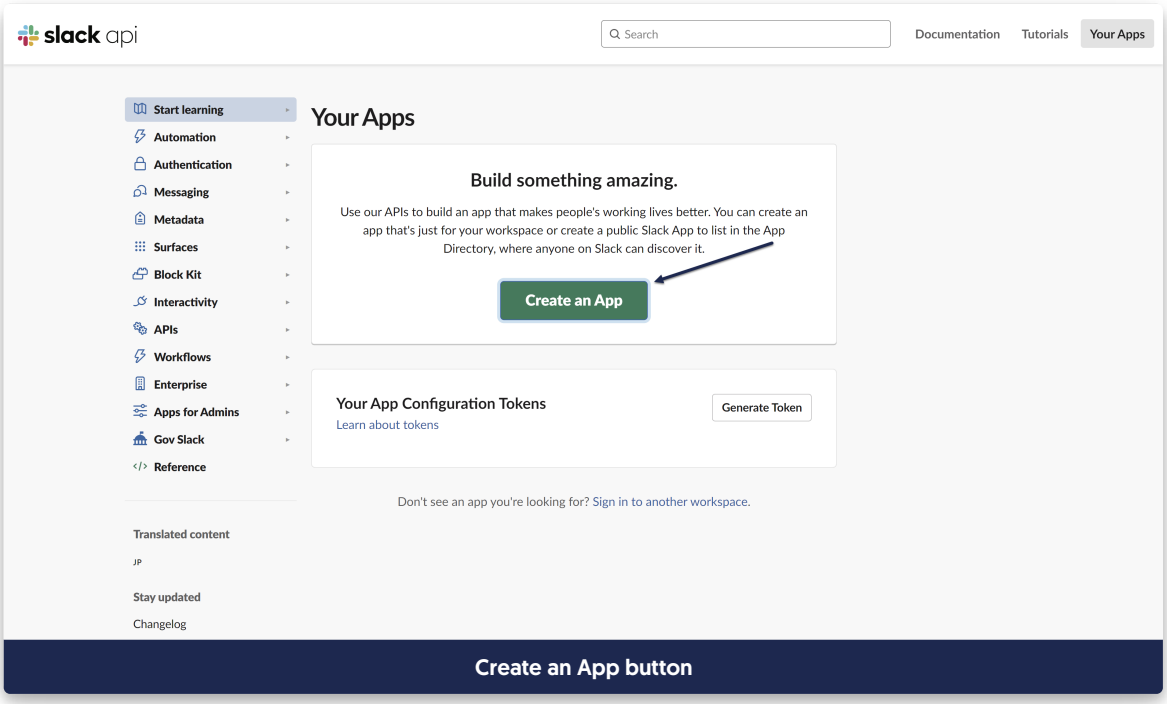
Last Modified on 05/29/2024 5:28 pm EDT

If you don't want to rely on our pre-built KnowledgeOwl Webhooks Slack app, you can create webhooks to monitor your team's editing activity, or your customers' feedback inside of your Slack account in real time. This involves some set up on the Slack and the KnowledgeOwl side.

Previous versions of these instructions suggested you install the Incoming Webhooks app. Slack has announced deprecation of that app. Please follow the instructions below to create your own Slack app using the Incoming Webhooks functionality, or Use the KnowledgeOwl Webhooks Slack app.

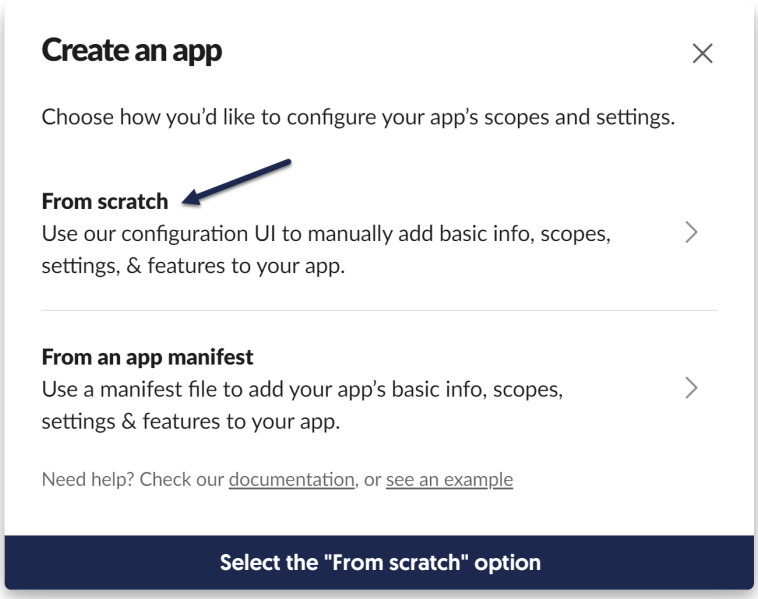
Slack

1. In a browser, go to https://api.slack.com/apps.
2. Click the **Create an App** button.

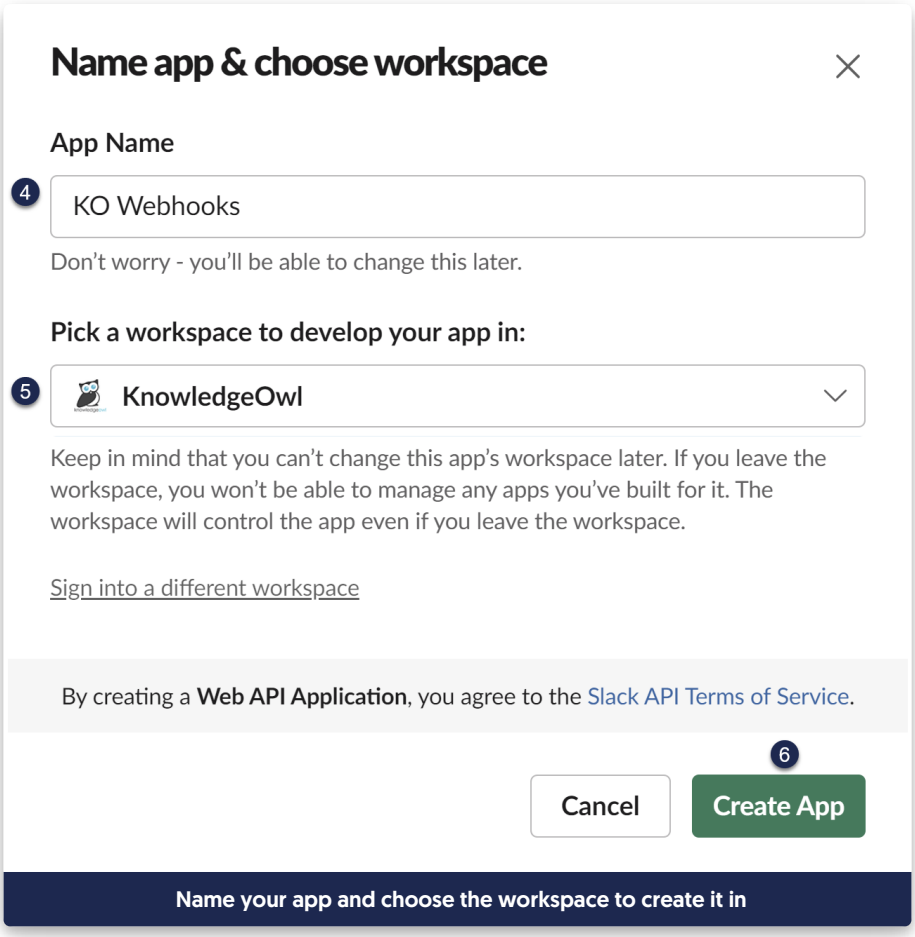


Create an App button

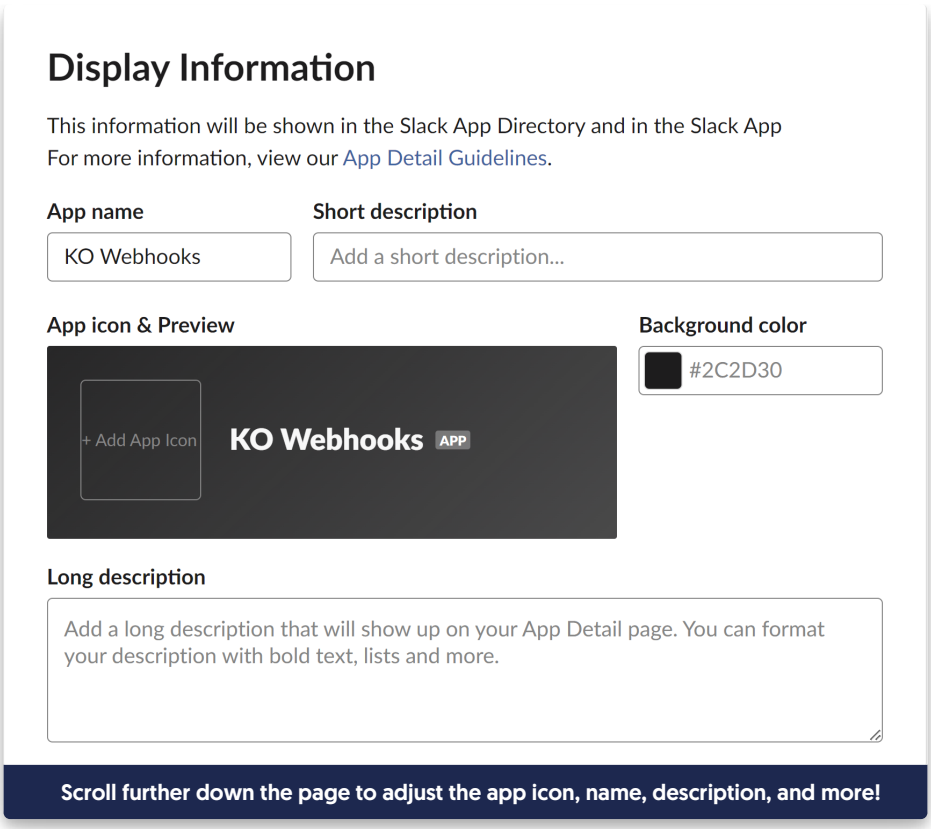
3. In the **Create an app** pop-up, select the **From scratch** option.



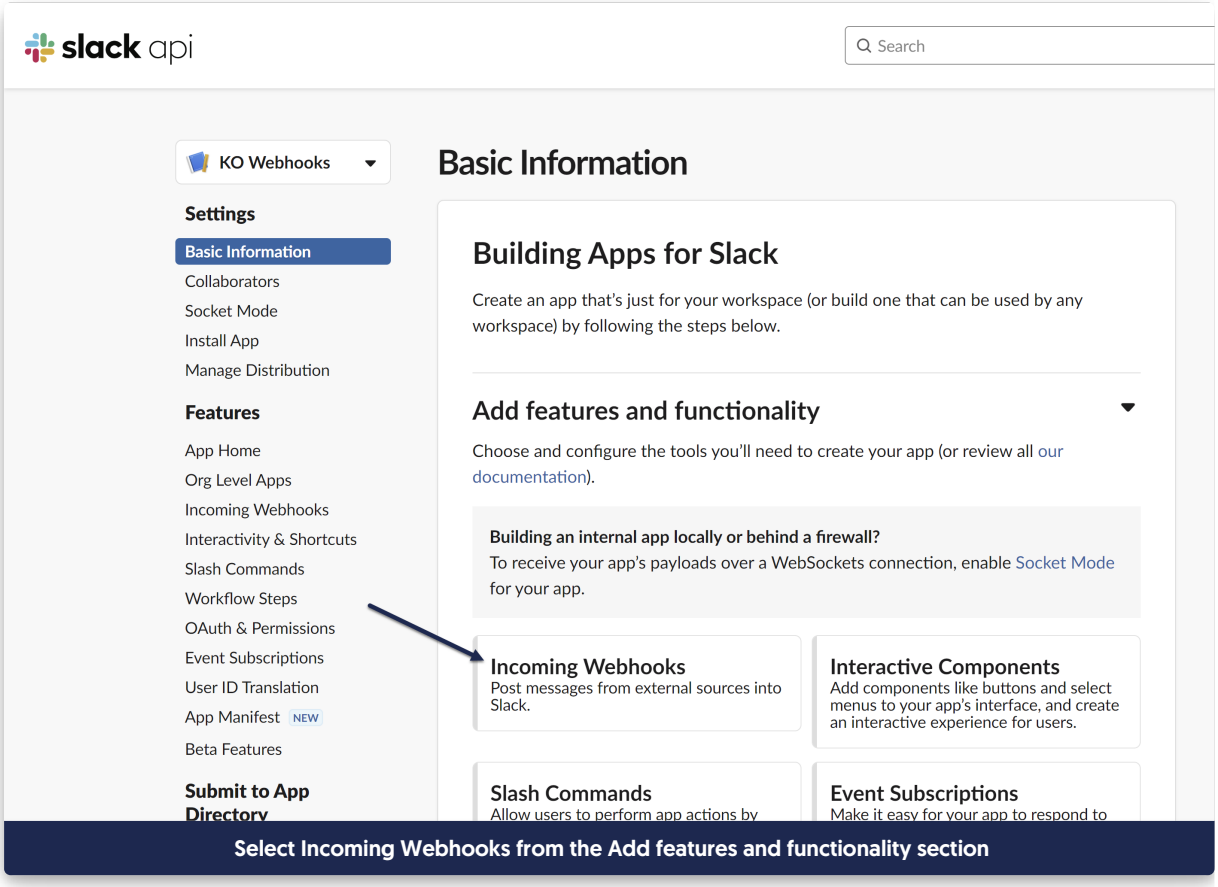
4. **Give your app an App Name. Here, we use KO Webhooks.**
5. **Select the Slack workspace to add the app to.**
6. **Once you've finished making your selections, click the Create App button.**



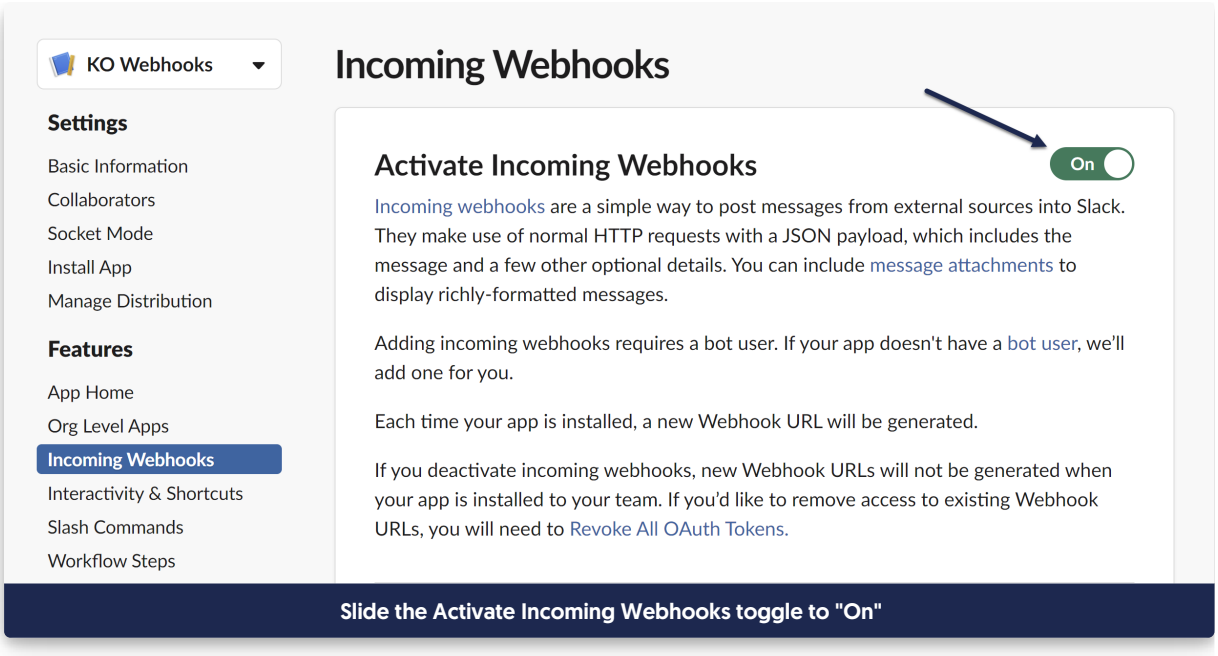
7. ***Optional:*** **Your Slack App will use a default logo of a notebook and ruler when it posts through the webhook and a specific background color. To update that image or background color, you can scroll down the page to the Display Information section to update the App Icon, background color, name, and various descriptions.**



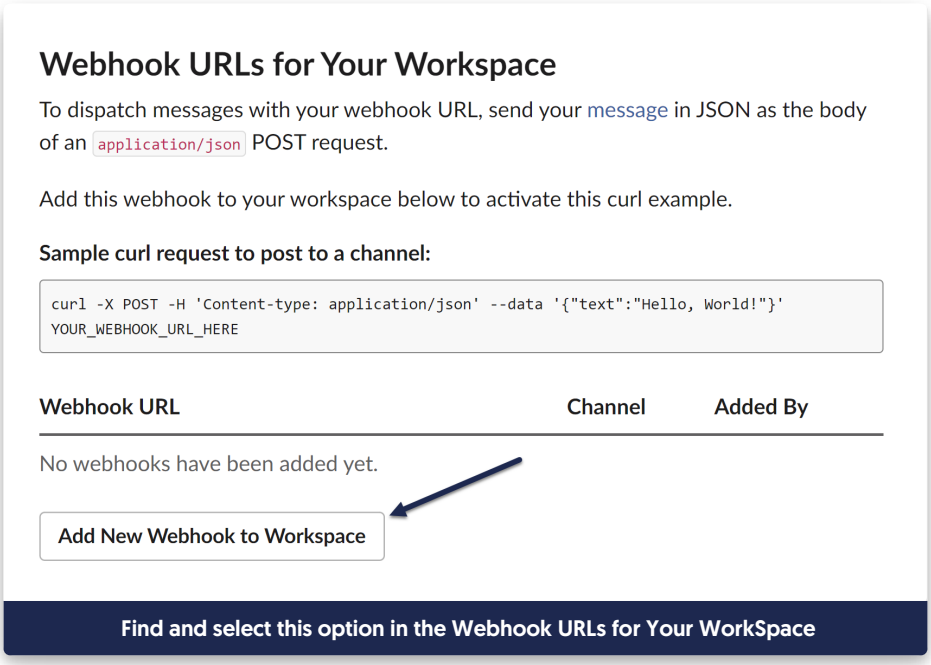
8. Near the top of the page in the **Add features and functionality** section, select **Incoming Webhooks**.



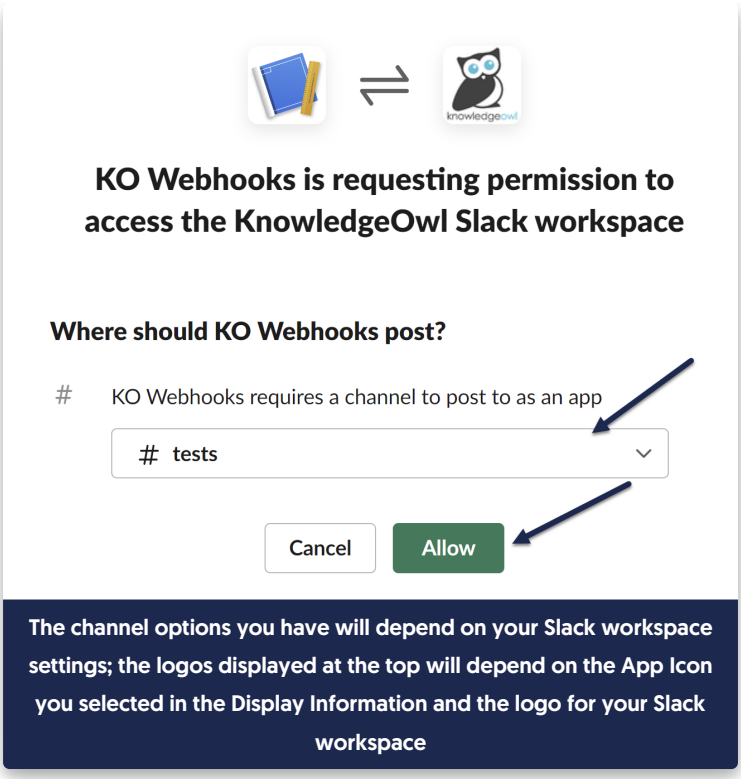
9. Once the **Incoming Webhooks** page opens, toggle the **Activate Incoming Webhooks** setting to **On**.



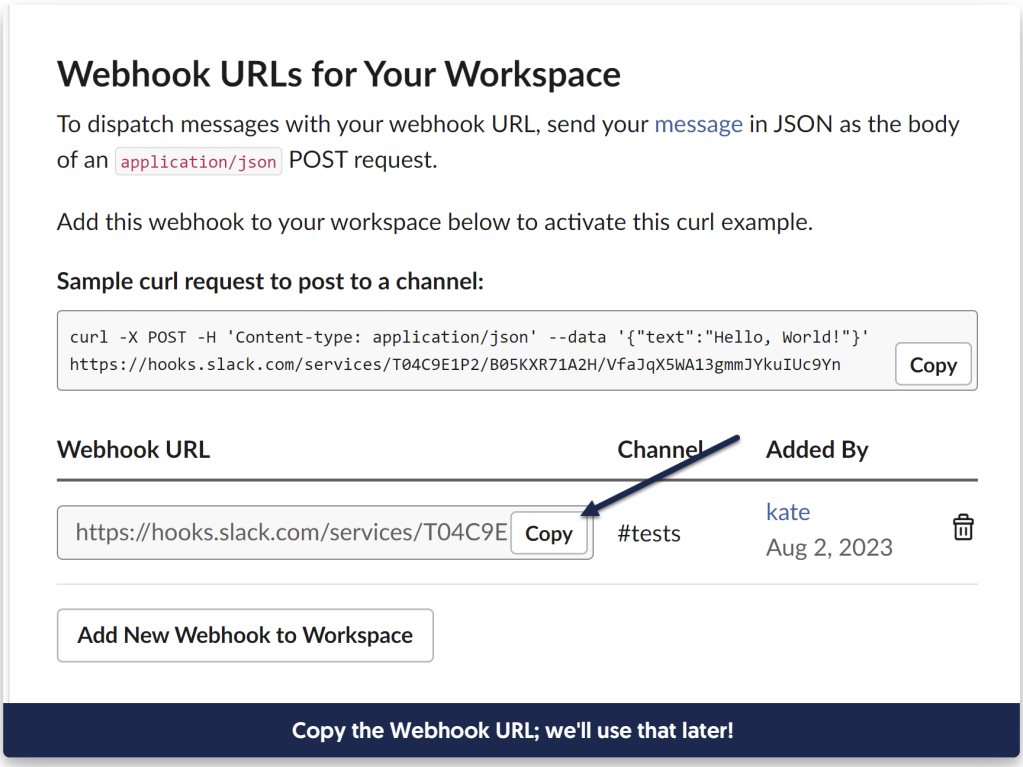
10. **Scroll down to the Webhook URLs for Your Workspace section and click the Add New Webhook to Workspace button.**



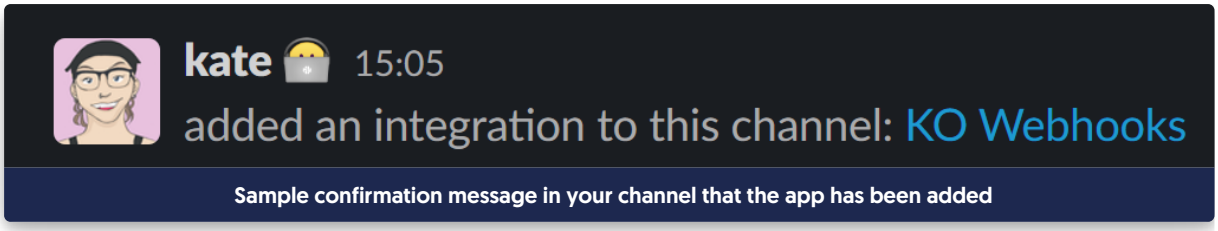
11. **This will prompt you to select a channel to post to in the app within the Slack workspace you selected in Step 5. Choose the channel you'd like the webhooks to post to and select Allow. Here, we're using the #tests channel:**



12. **This will now show a new Webhook URL in the Webhook URLs for Your Workspace section. Click the Copy button to copy it--we'll need to use it in the next set of steps!**



13. **You can confirm the app was set up correctly by viewing the channel you selected; you should see a message saying that you added an integration to the channel. This notification will show as a message from you, since you're the one who set up the app.**

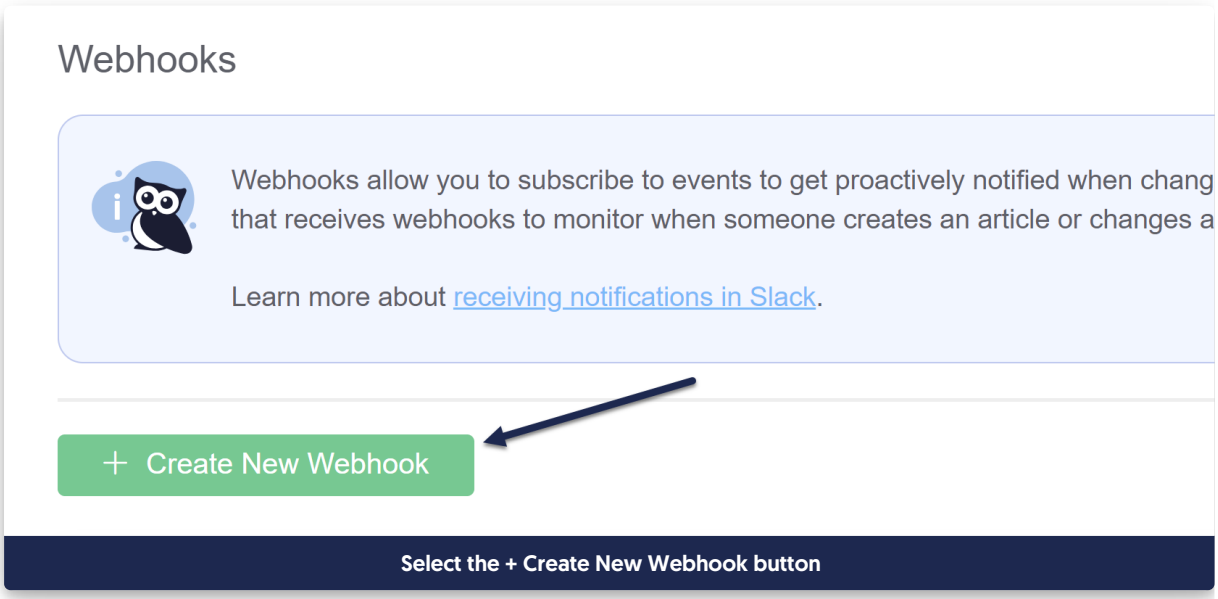


Sample confirmation message in your channel that the app has been added

Now you're all set to move on to the KnowledgeOwl side of the configuration!

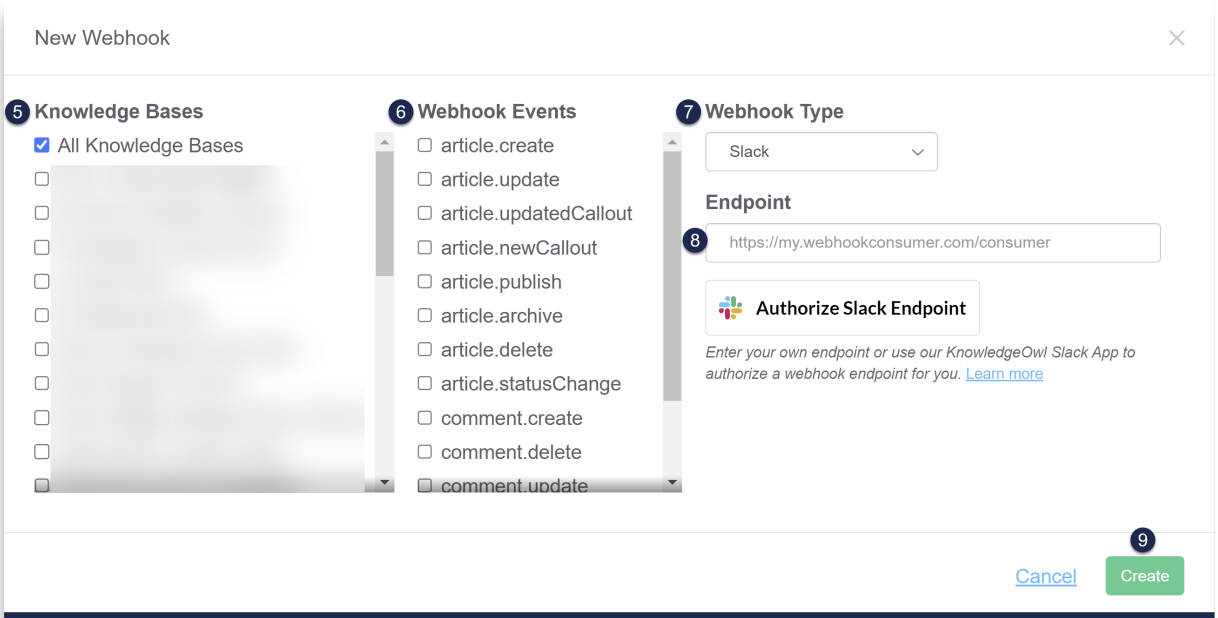
In KnowledgeOwl

1. Click on your **profile icon/name** in the upper right.
2. Select **Webhooks** from the dropdown.
3. Select the **+ Create New Webhook** button.



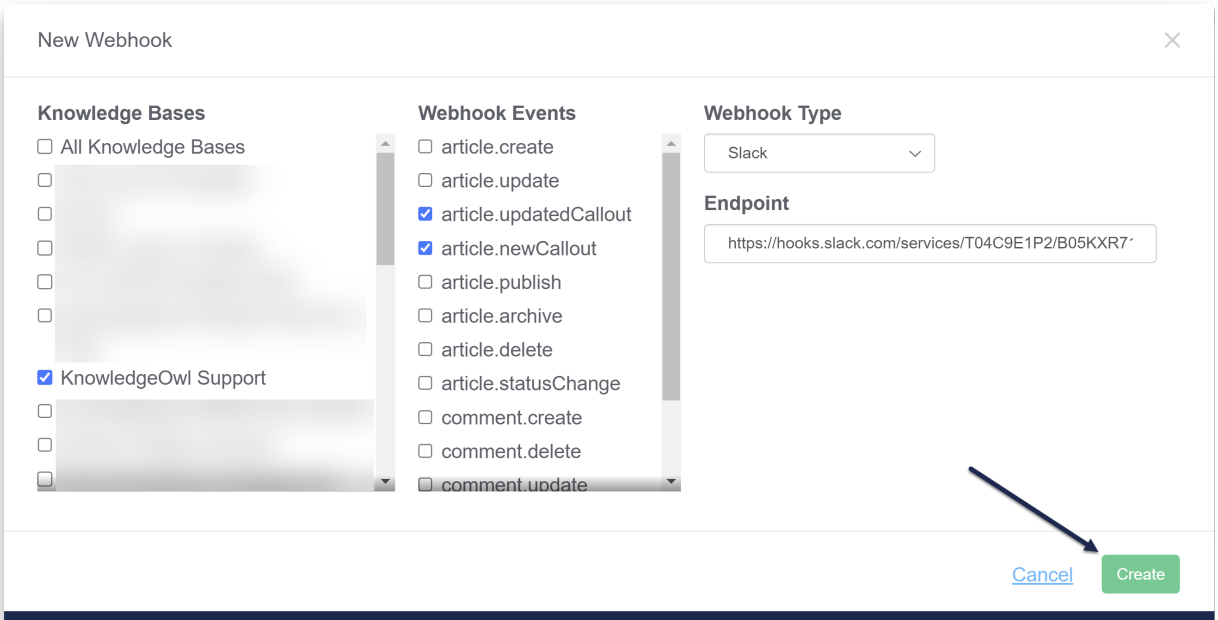
Select the + Create New Webhook button

4. This will open a pop-up where you can configure your webhook:



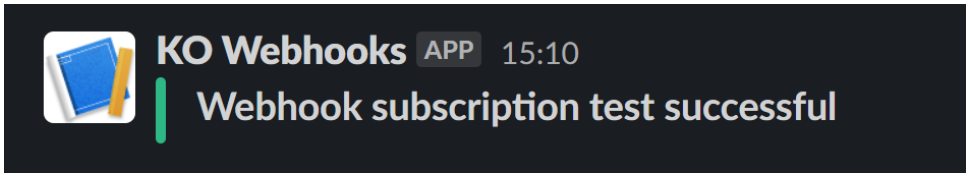
The options available in the New Webhook pop-up

5. Choose the **Knowledge Bases** you want to receive notifications about.
6. Choose the **Webhook Events** you want to receive notifications about. See Available webhook events for more details.
7. Select Slack from the **Webhook Type** dropdown.
8. Paste the **Webhook URL** you copied from Slack into the **Endpoint** text field.
9. Once you're done setting the webhook configuration, click the **Create** button.



A sample webhook configured for our KnowledgeOwl Support knowledge base only, which will fire when New or Updated callouts are added to articles and will submit to the Slack endpoint we created as part of our Slack app in the previous section!

10. After you create your webhook, you should see a new notification in your Slack channel (the display may vary based on the Display Information you selected):



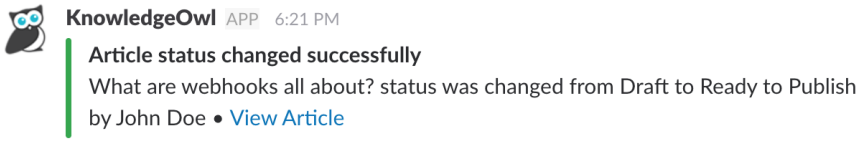
If you received that notification, congratulations your webhook is ready to go!

Common Use Cases

Article Workflows

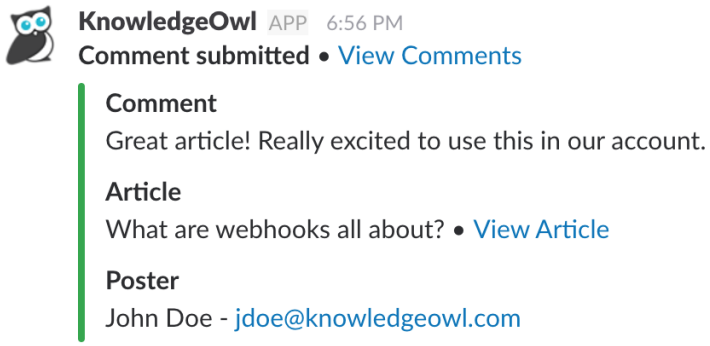
You can subscribe to the **article.create** and **article.statusChange** events to receive notifications in Slack whenever someone either creates a new article, or (for example) changes an article from "Draft" to "Ready to Publish".

This can be a great way to monitor your teams writing activity, and when used in conjunction with custom author roles, it can be a powerful way to manage and approve content before it goes live.



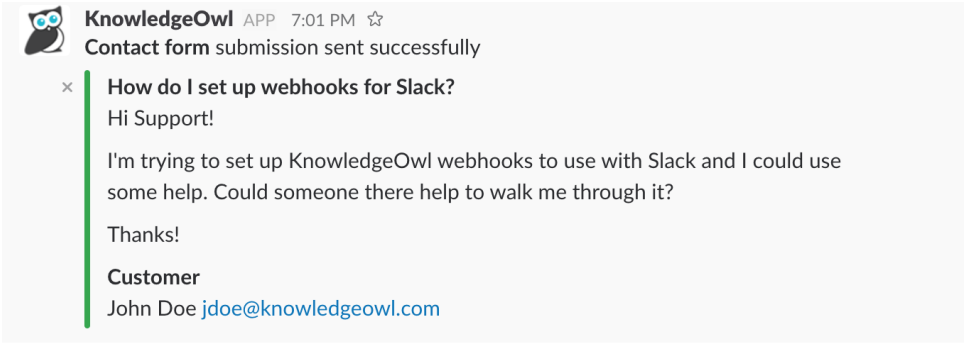
Reader Comments

Subscribe to **comment.create** to receive new comments including the comment text itself, or **comment.statusChange** to be notified whenever someone publishes or deletes a comment.



Contact Form Submissions

Subscribe to **contactForm.submit** to receive notifications whenever someone submits a ticket from your knowledge base or embedded help widget.


KnowledgeOwl APP 7:01 PM
Contact form submission sent successfully
How do I set up webhooks for Slack?
Hi Support!
I'm trying to set up KnowledgeOwl webhooks to use with Slack and I could use some help. Could someone there help to walk me through it?
Thanks!
Customer
John Doe jdoe@knowledgeowl.com

Integrate KnowledgeOwl with Zapier

Zapier is an online automation tool that allows you to connect apps you use every day to automate tasks. By using Zapier with KnowledgeOwl, you can integrate with hundreds of apps in minutes, even apps that are not natively integrated with KnowledgeOwl. Save time and get more done by creating zaps with the tools you already know and love.

Advanced Tutorials

Prerequisites

Last Modified on 05/29/2024 5:27 pm EDT

- KnowledgeOwl account - sign up or log in
- Zapier account - sign up or log in. Note that you can test Zaps, including premium functionality, on the free tier, but you need a paid plan to use Webhooks by Zapier in a live Zap.
- Recommended: a test knowledge base, or test section, so you can try out your Zaps without affecting live documentation or real data.
- For the tutorial: a Google account.

Quickstart

Last Modified on 05/29/2024 5:27 pm EDT

The basic steps to use Zapier with KnowledgeOwl's webhooks are:

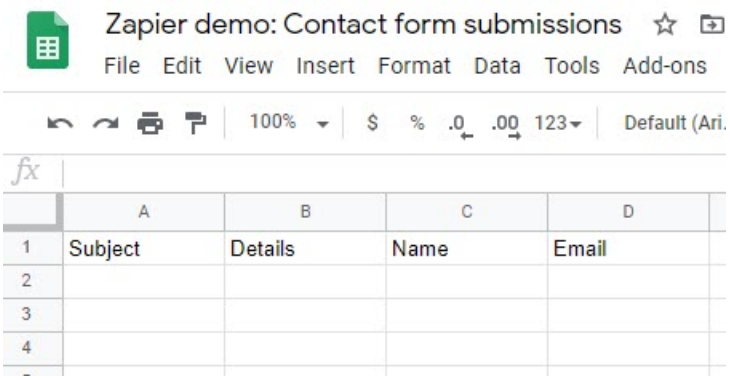
1. Log in to Zapier and create a new Zap, using Webhooks by Zapier. Set Catch Hook as the trigger event. Make a note of the Custom Webhook URL.
2. Log in to KnowledgeOwl and create a webhook for your knowledge base: Webhooks overview and creation. Use the Zapier custom webhook URL as the Endpoint.
3. Trigger the webhook with some test data (for example, create an article, or submit a contact form).
4. Use the test data to configure your Zap.

Tutorial

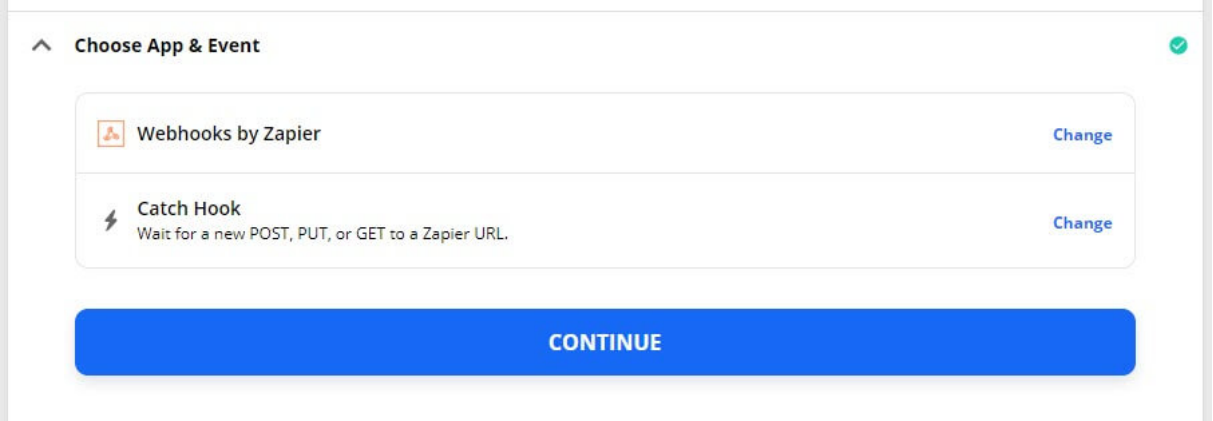
Last Modified on 05/29/2024 5:27 pm EDT

This section provides a step by step tutorial of a potential use case for the Zapier and KnowledgeOwl webhooks integration. In this example, you will catch every new contact form submission, and send the data to a Google Sheets spreadsheet.

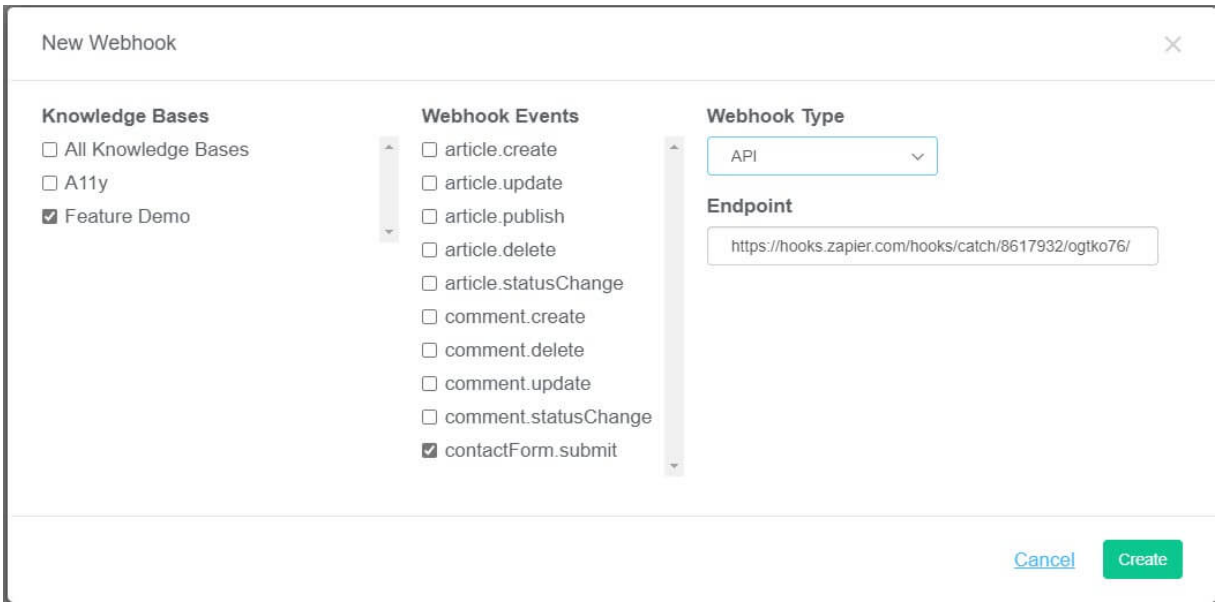
The tutorial includes detailed steps for using Zapier. You can also refer to the Zapier documentation, Trigger Zaps from Webhooks, and their Webhooks overview, which includes a tutorial video.

1. Log in to Google Sheets.
2. Create a new blank spreadsheet.
3. Add the following column headings:
    - Subject
    - Details
    - Name
    - Email
4. 

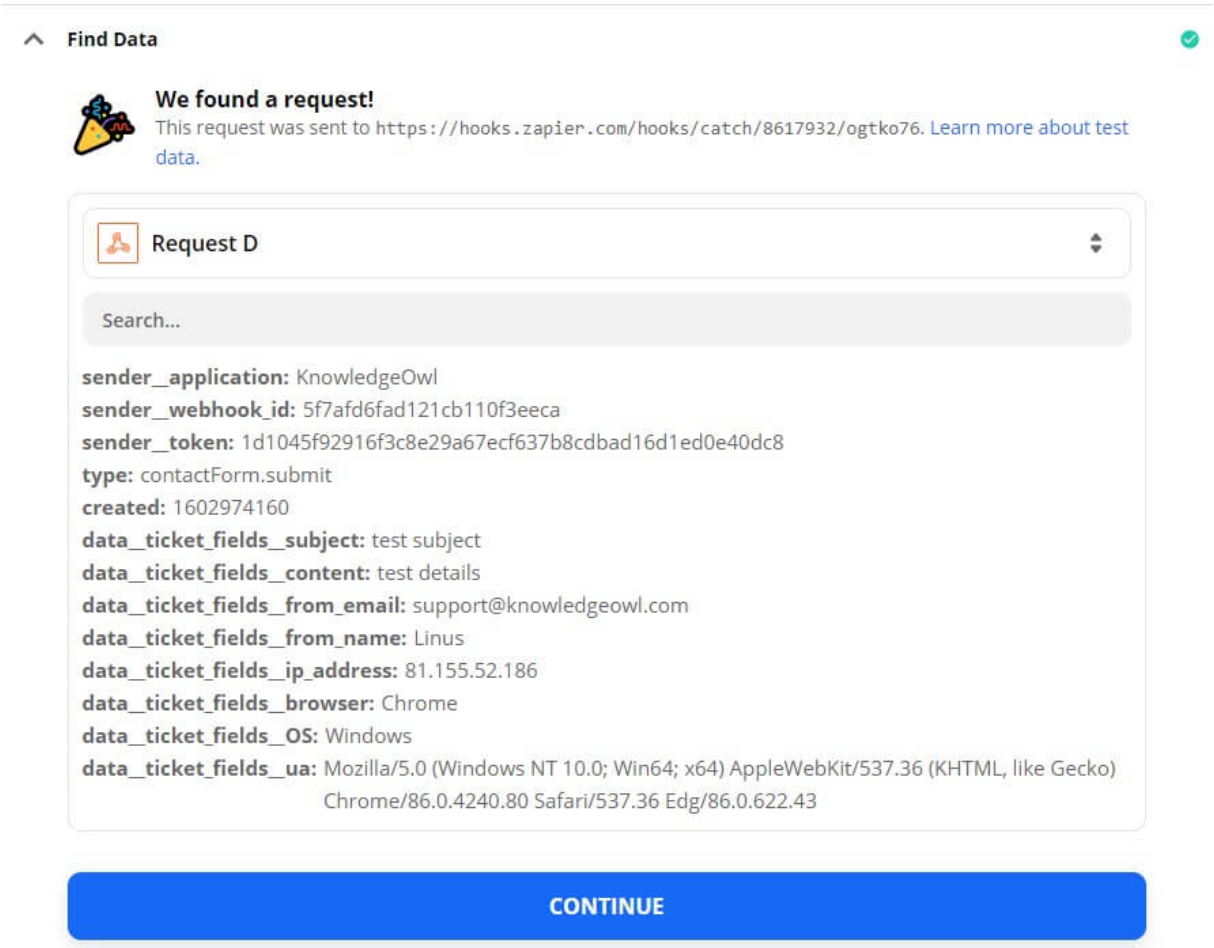
5. Log in to Zapier. You can create a Zap in the Dashboard, but it is clearer to see the options in the Zap editor. Select **Zaps** > **Create Zap** to open the editor.
6. In **Name your zap**, give your Zap a meaningful name, such as “KnowledgeOwl tutorial”.
7. In the **Choose App & Event** section, search for and select "Webhooks by Zapier".
8. In **Choose an Event**, select **Catch Hook**.



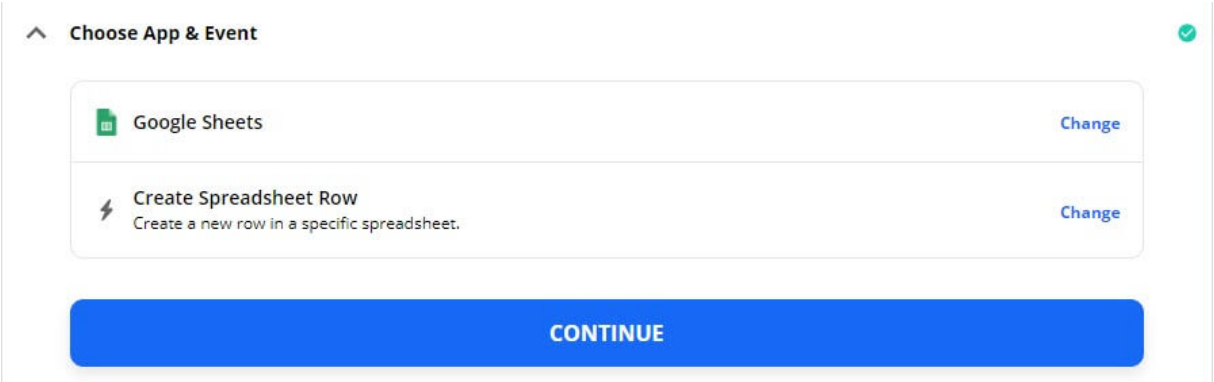
9. Select **CONTINUE**.
10. Copy the Custom Webhook URL.
11. In a new tab, log in to KnowledgeOwl.
12. Create a new webhook: select **Your Account** > **Webhooks** > **+ Create New Webhook**.
13. Under **Knowledge Bases**, select your test knowledge base.
14. Under **Webhook Events**, select **contactForm.submit**.
15. In **Webhook Type**, select API.
16. Paste Zapier's custom webhook URL into **Endpoint**.



17. Select **Create**.
18. We now need to get some test data into Zapier. Go to your knowledge base contact form, add a subject and details (this can just be "test" or whatever you like), and submit it.
19. Return to Zapier. In **Find Data**, you can select which request to use as your example data. Select the form submission you just sent. It may be called something like "Request A". When you select it, you can see details, such as time and subject.



20. Select **CONTINUE.**
21. Zapier may offer you the option to test the webhook. You can skip this: we know it is working because the find data step worked.
22. Select **CONTINUE.**
23. In the **Choose App & Event** section, search for and select "Google Sheets".
24. Select **Create Spreadsheet Row.**

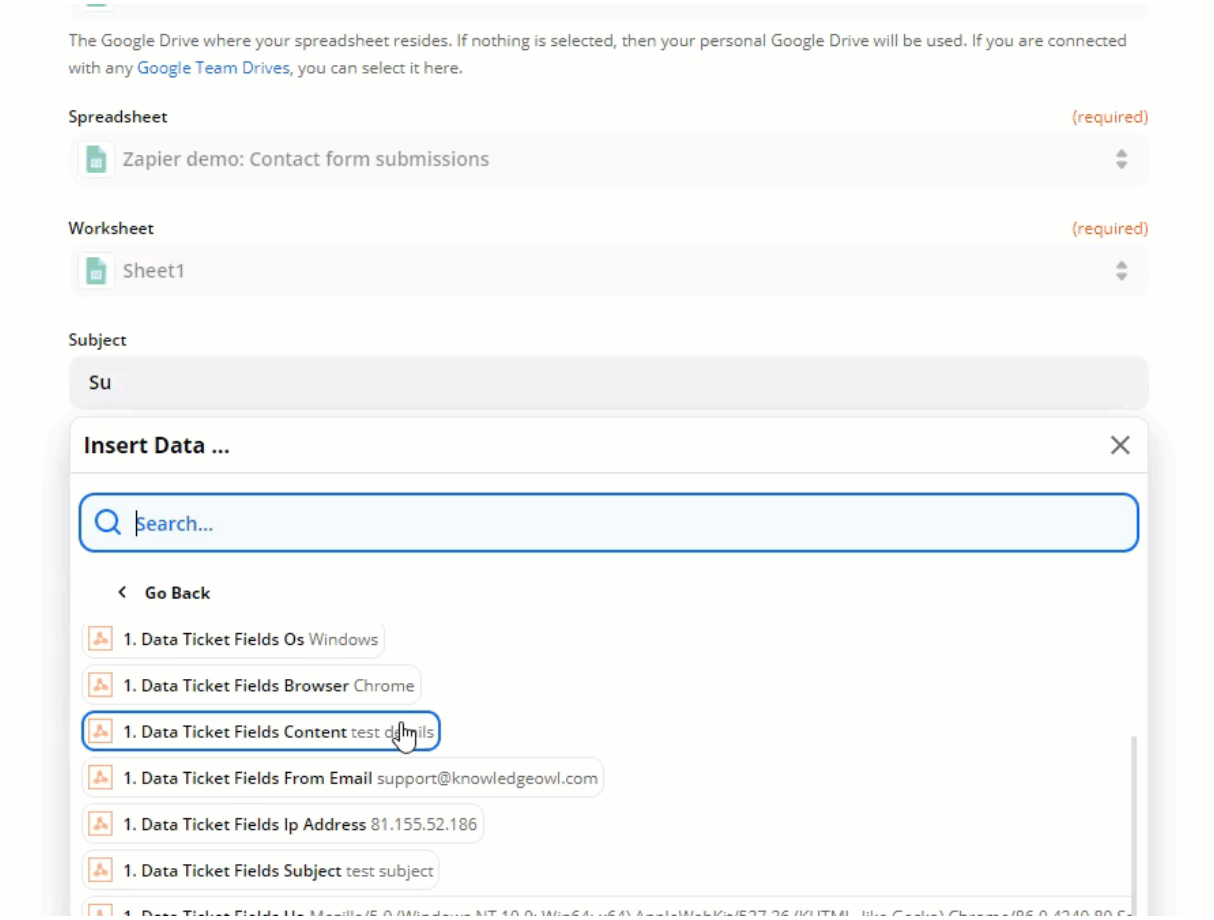


25. Select **CONTINUE.**
26. Zapier prompts you to sign in to Google Sheets with your Google account. Sign in, and give Zapier the permissions it asks for.

27. Select **CONTINUE**.

28. In **Customize Spreadsheet Row**, select the Drive, Spreadsheet, and Worksheet you want to send data to. Select the spreadsheet you created at the start of the tutorial.

29. Zapier automatically detects your worksheet's column headings. For each heading, you need to link it to an object in the webhook payload. This is the data that Zapier received when you submitted your test contact form. In the fields provided by Zapier, browse for and select the data you want to send to that column of your spreadsheet. For example, if you set up the spreadsheet with a "Subject" column, Zapier will provide a Subject field. Browse for the data object that contains the contact form subject (Data Ticket Fields Subject) and select it.



30. Once you have completed all the fields, select **CONTINUE**.

31. You can now test the Zap. Select **TEST & CONTINUE**.

32. Zapier will tell you when the test is successful. Go to the spreadsheet to check: the data from the test contact form submission should now be in the spreadsheet.

33. To set the Zap live and start logging all your contact form submissions, select **TURN ON ZAP**. You need a paid Zapier account to turn on the Zap, as Webhooks by Zapier is a premium feature.

More use cases

Last Modified on 05/29/2024 5:27 pm EDT

The tutorial described how to get data from a contact form into Google Sheets. You can use webhooks for lots of other things. Here are a few ideas.

Forward contact form submissions to Salesforce

Linus uses Salesforce to manage his customer relationships. He wants to ensure anything submitted with his knowledge base contact form is captured by Salesforce. He creates a Zap that listens for the **contactForm.submit** event. then forwards the data to Salesforce using the Salesforce Zapier integration.

Automate social media

Linus wants to promote new content on Twitter. He sets up a Zap that sends a tweet whenever a new article is published, using the **article.publish** event and the Zapier Twitter integration.

View a list of KnowledgeOwl webhooks here: Available webhook events.

Prerequisites

Last Modified on 05/29/2024 5:27 pm EDT

- KnowledgeOwl account - sign up or log in
- Zapier account - sign up or log in. Note that you can test Zaps, including premium functionality, on the free tier, but you need a paid plan to use Webhooks by Zapier in a live Zap.
- Recommended: a test knowledge base, or test section, so you can try out your Zaps without affecting live documentation or real data.
- For the tutorial: a Google account.

Quickstart

Last Modified on 05/29/2024 5:27 pm EDT

The basic steps to use Zapier with KnowledgeOwl's API are:

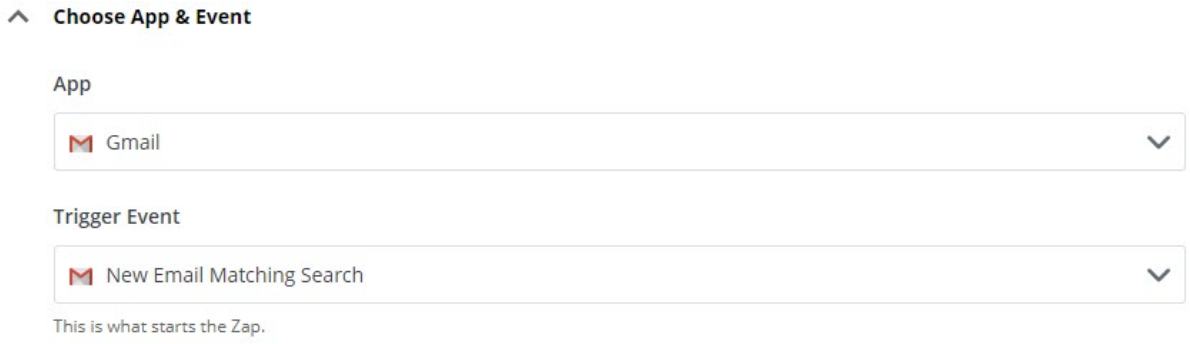
1. Log in to Zapier and create a new Zap, using Webhooks by Zapier in the action step to call the API.
2. Log in to KnowledgeOwl and create a new API key for your knowledge base: How to generate an API key.
3. Refer to KnowledgeOwl's API documentation to get the URL endpoint and information about the required data.
4. In Zapier, enter the URL endpoint, select JSON as the payload type, map the data from your data source (this could be an email, for example) to the data structure required by the API, and enter the API key and a dummy password as authentication.

Tutorial

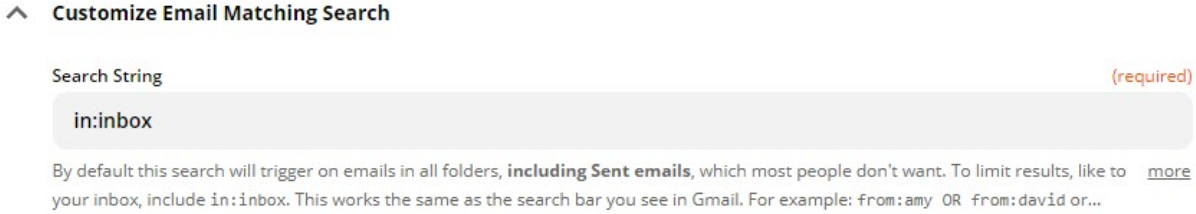
Last Modified on 05/29/2024 5:27 pm EDT

This section provides a step by step tutorial of a possible use case for the Zapier and KnowledgeOwl API integration. In this example, you will catch every new email sent to a Gmail inbox, and use them to create a new article.

1. Send an email to the Gmail address that you want to use for article creation. For this tutorial, you can use any Gmail address, but if you plan to use this workflow live, you should create a dedicated Gmail account: this example will create an article from every email received in the inbox.
2. Log in to Zapier. You can create a Zap in the Dashboard, but it is clearer to see the options in the Zap editor. Select **Zaps** > **Create Zap** to open the editor.
3. In **Name your zap**, give your Zap a meaningful name, such as “KnowledgeOwl tutorial”.
4. In **Choose App & Event**, search for and select "Gmail". Zaper displays a list of events you can listen for.
5. Select **New Email Matching Search**.

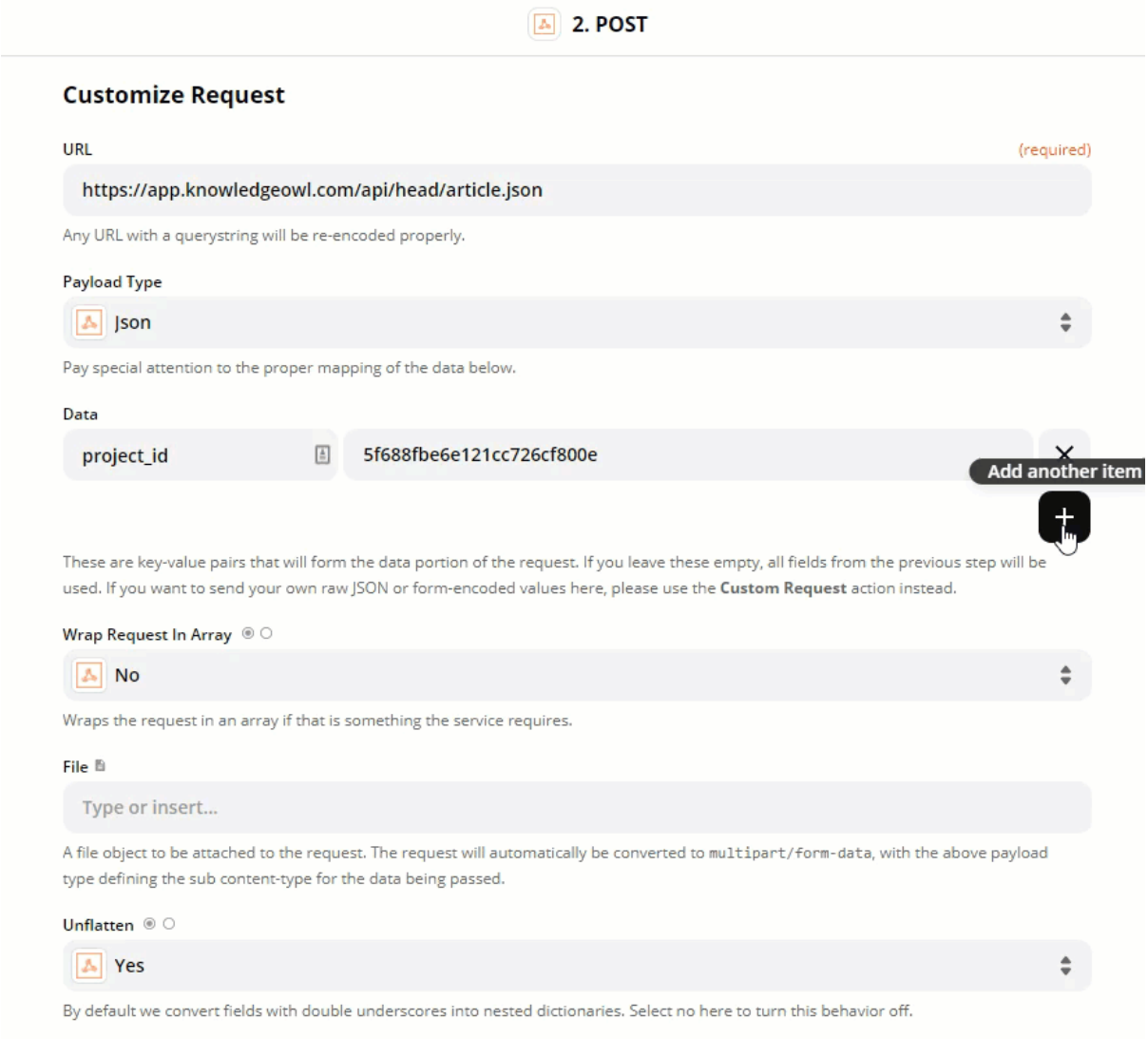


6. Select **CONTINUE**.
7. Zapier prompts you to sign in to Gmail with your Google account. Sign in, and give Zapier the permissions it asks for.
8. Select **CONTINUE**.
9. You can now customize which emails Zapier uses to create articles. In **Search String**, enter "in:inbox". This ensures Zapier ignores any emails sent from the account.



10. Select **CONTINUE**.

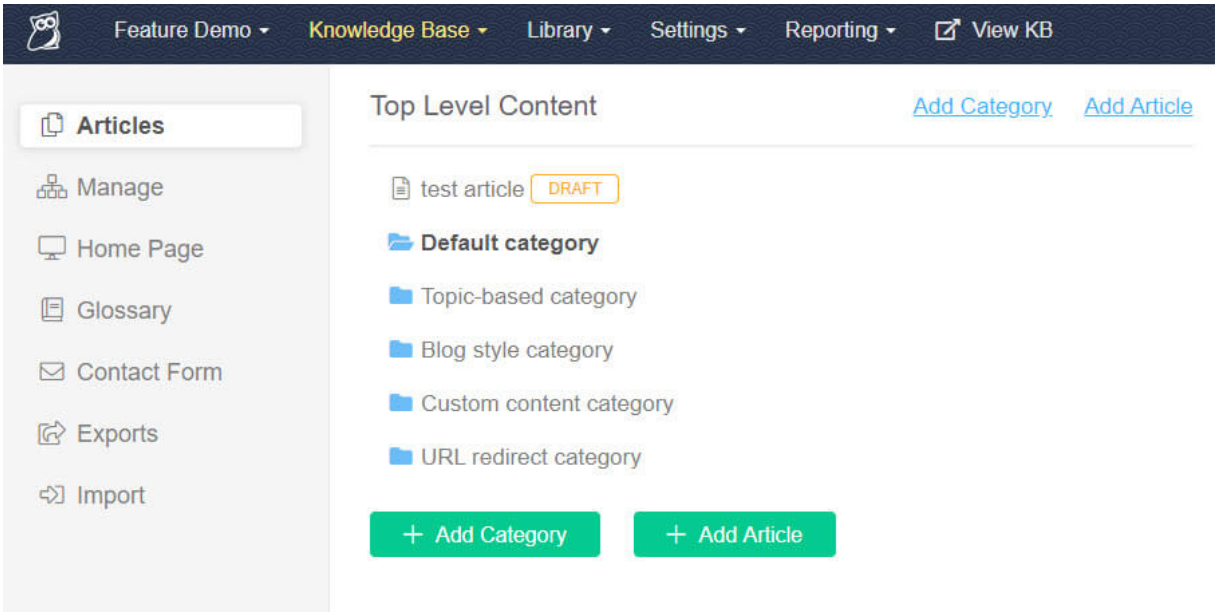
11. Select **Test trigger**.
12. Zapier loads the newest email. If this is not the test email you sent, browse for and select the correct email.
13. Select **CONTINUE**.
14. In the **Choose App & Event** section, search for and select "Webhooks by Zapier".
15. In **Action Event**, select **POST**.
16. Select **CONTINUE**. Zapier displays the API call configuration form.
17. In **URL**, enter "https://app.knowledgeowl.com/api/head/article.json". This is the article creation API endpoint.
18. In **Payload Type**, select **JSON**.
19. In **Data**, set up the data you want to send from Gmail to KnowledgeOwl. This data must be in the form of key-value pairs. The key is the name used by the KnowledgeOwl API, and the values are either entered directly in Zapier or come from the email. Refer to Articles Endpoint: Create and Article for information on all the available fields. For this tutorial, enter the following:
    - project_id: enter your knowledge base ID. You can get this from the URL of your knowledge base editor. Log in to KnowledgeOwl, and select the knowledge base you want to use. KnowledgeOwl opens the **Articles** page. Look at the URL. It ends in a long string of numbers and letters. This is the ID.
    - status: enter "draft".
    - url_hash: browse the data available from the email, and select **ID**. This ensures a unique URL.
    - name: browse the data from the email, and select **Subject**.
    - current_version: browse the data from the email, and select **Body Plain**.
20.



21. In **Basic Auth**, enter your API key and a dummy password, in this format:
    key | password

22. Select **CONTINUE.**

23. Select **TEST & CONTINUE.** When Zapier displays a success message, go to your knowledge base. There should be a new draft article at the top level of your content.


Feature Demo
Knowledge Base
Library
Settings
Reporting
View KB
Articles
Manage
Home Page
Glossary
Contact Form
Exports
Import
Top Level Content
Add Category
Add Article
test article
DRAFT
Default category
Topic-based category
Blog style category
Custom content category
URL redirect category
+ Add Category
+ Add Article

More use cases

Last Modified on 05/29/2024 5:27 pm EDT

The tutorial described how to get data from an email and use it to create an article. You can use the KnowledgeOwl API and Webhooks by Zapier for lots of other things. Here are a few ideas.

Log comments

Linus wants to log all comments on articles for further analysis and sharing. He sets up a Zap that uses the KnowledgeOwl API to get a list of all comments using the List Comments endpoint, then outputs them to a spreadsheet using Zapier's Google Sheets integration.

Autogenerate a newsletter

Linus wants to automatically update his readers about new content. He sets up a Zap that uses the List Articles endpoint of the KnowledgeOwl API to get a list of his most recently created articles, then send them as a newsletter with the MailChimp integration.

Install Zendesk App

Last Modified on 05/29/2024 5:28 pm EDT

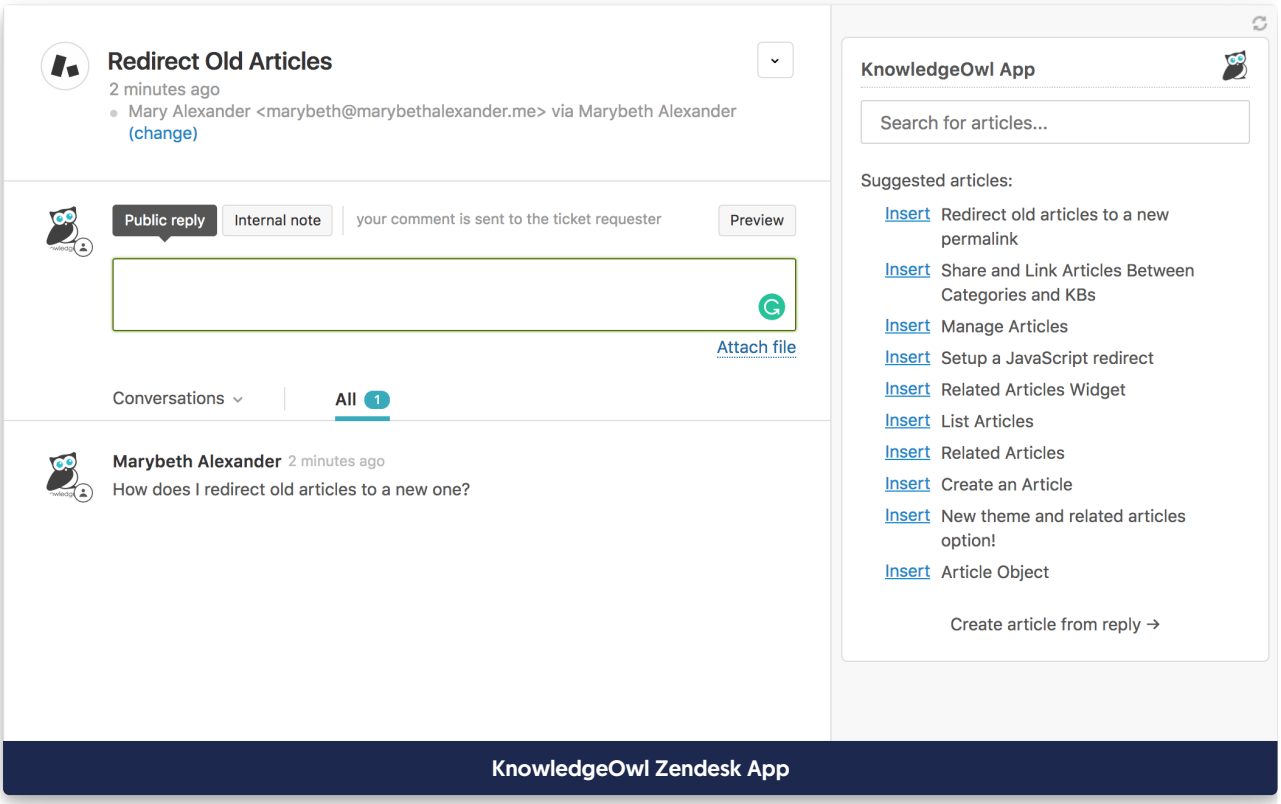
Install the app from the Zendesk Marketplace. To create a custom version of the app or look behind the scenes, download it from our Github repository.

The KnowledgeOwl Zendesk App helps agents by...

- Suggesting relevant articles based on the subject of the message
- Allowing agents to search for and insert links to relevant articles
- Allowing agents to create new articles from an existing ticket

The KnowledgeOwl Zendesk App will search the subject of tickets and suggest related articles from your KnowledgeOwl knowledge base for your agents to share with customers. This will hopefully help your support agents keep familiar with your knowledge base content and encourage them to share documentation.

Agents can insert links into their response with the click on a button.



KnowledgeOwl Zendesk App

Agents can also submit searches in the KnowledgeOwl Zendesk App to find the specific article they wish to share.

Once the desired article is found, agents can click the article title to open in a new tab and review it to ensure it has the content they wish to share. If the agent needs to include more than one article, the agent can submit another search!

Setup

Click the Admin icon in the sidebar, then select Apps > Manage. Click to the button to "Upload private app" and follow the instructions.

Once the KnowledgeOwl app is installed, test it out. If you have a private domain set up in KnowledgeOwl, the app will use this domain in the links!

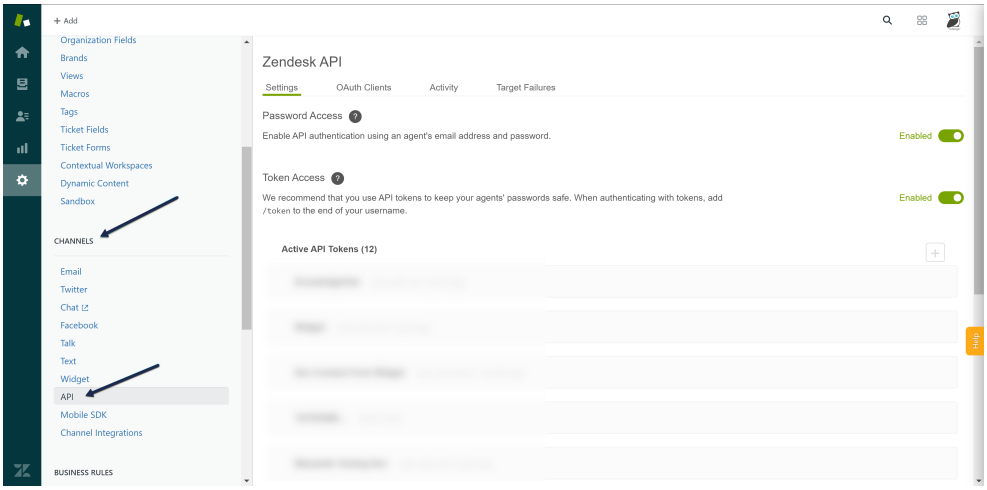
Create Zendesk Tickets

Last Modified on 05/29/2024 5:28 pm EDT

You can set up your contact form and Contextual Help Widget (2.0) to automatically create tickets in your Zendesk account. The contact form will then create tickets via the API as your specified user and include some helpful metadata in a private comment.

To set this up, you'll need this info from Zendesk:

- Your Zendesk **domain** - this appears before zendesk.com when you set up your account. It's also viewable in Zendesk through **Admin > Account > Branding** in the Subdomain section.
- Your Zendesk **username** - what you use to log in to Zendesk with
- A Zendesk **API key** - you can create one through **Admin > Channels > API**:



Once you have this information in hand, you can configure your KnowledgeOwl Contact Form to use Zendesk:

1. In the lefthand menu, select **Contact Form**.
2. Check the box next to **Enable Contact Form**.
3. *Optional:* If you don't want KnowledgeOwl to store any of your contact form submission details, check the box next to **Do not store any collected ticket information within KnowledgeOwl**. See What data is collected in the Contact Form? for more information.
4. *Optional, Recommended:* If your knowledge base is public in any way, we recommend checking the box to **Use spam protection on ticket submissions** to try to prevent spam/bot submissions. This setting will add whichever spam protection method is set in **Settings > Basic > Spam Protection Settings**.
5. *Optional, Recommended:* Add a **Backup email**. If the Zendesk API integration isn't working for any reason, we will email contact form submissions to this backup email account.
6. Choose Zendesk as your **Send Method**.
7. Add your Zendesk domain, username, and API key.

8. *Optional:* If you'd like to include the Zendesk Priority field in your KnowledgeOwl contact form, check the box next to **Enabled**. You can make it **Required** by checking that box, too.

9. *Optional:* If you're using custom fields in Zendesk that you want included in your contact form, add them into the Custom Fields section:

    a. The **label** specifies how the field will be labeled in the contact form.

    b. The **Type** defines what kind of data it should accept.

    c. The **ID**is the ID as it appears in your Zendesk configuration.

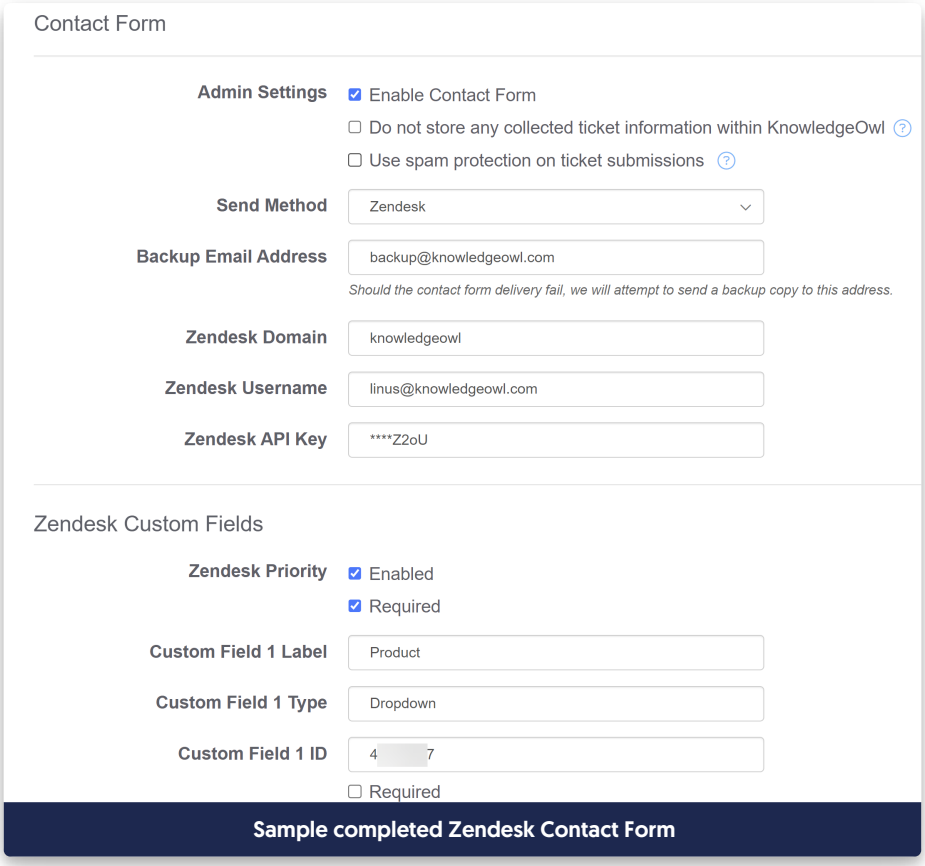


Zendesk custom fields are not compatible with Contextual Help Widget (2.0).

10. Be sure to **Save** your changes.

Your Contact Form is now live at /contact-us! You can Update wording in the Contact Form and/or Customize Contact Form Link to make it even more your own.

A completed setup might look like this:



Sample completed Zendesk Contact Form

Import from Zendesk

Last Modified on 05/29/2024 5:27 pm EDT

If you or one of your teams has already been using Zendesk as a knowledge base solution, you may have a lot of content there you'd like to move over to KnowledgeOwl. You can import that content from a Zendesk knowledge base/help center directly into your KnowledgeOwl knowledge base with a few clicks.

Before you start

Be sure you have admin access to your Zendesk account before you try to import, since you'll need access some options in Admin Center. Specifically, you'll need:

- your **Zendesk subdomain**
- a **Zendesk user email** with access to the Zendesk knowledge base you're importing content from
- a valid **Zendesk API token**. This may require you to enable API access in your Zendesk account. Refer to Managing access to the Zendesk API for instructions on both.

Import your content from Zendesk

1. Confirm you can get the required information from Zendesk. (Generally you can do all of this if you can access /admin/home in your Zendesk account.)
2. In KnowledgeOwl, go to **Knowledge Base > Import.**
3. Select **Zendesk Import**.
4. Enter a **Zendesk Domain**: this is your Zendesk subdomain name. For example, `knowledgeowl` is the domain we'd enter for a help center located at knowledgeowl.zendesk.com.

   Zendesk private domains
   If you're using a private domain with your Zendesk account, you'll still want to use your Zendesk subdomain here, not the full private domain.

5. Enter a **Zendesk Username**: this is the email address of an existing Zendesk user who has access to the Zendesk knowledge base. If you've accessed Zendesk to gather this information, you can generally use your own.
6. Enter a **Zendesk API Key**: Enter a valid Zendesk API token. Refer to Managing access to the Zendesk API for information on enabling API access and generating tokens. Here's what the import fields might look like importing from a knowledge base that's part of the knowledgeowl.zendesk.com account:

   Sample completed import fields
7. Once you've filled in each of the fields, select **Start Import**.

The import will display a progress bar and confirm once it completes. If you're testing the import in a new knowledge base and want to make changes and try to re-import, you can delete this knowledge base and create a new knowledge base to re-test the import. Refer to Testing imports for more details.

Introducing the KnowledgeOwl API

Last Modified on 05/29/2024 5:28 pm EDT

The KnowledgeOwl REST API provides a large collection of endpoints, allowing you to perform many of the same tasks that can be done through the GUI. This can be helpful in a variety of scenarios, including:

- Automating repeated tasks
- Bulk operations, such as extracting custom data reports.
- Integrating with other tools. For example, you can use the API with Webhooks by Zapier to integrate KnowledgeOwl with other software.

This section of the documentation provides information on how to query the API, including authentication and filtering. It is specific to the KnowledgeOwl API, and assumes you have some familiarity with REST APIs. If you are new to working with APIs, you may want to take a look at Working with APIs first.

Refer to Endpoint reference for details of available endpoints.

API Authentication

Last Modified on 05/29/2024 5:27 pm EDT

The API uses basic authentication. This means all API requests need to include a username and password. For the KnowledgeOwl API, the username must be an API key. The password can be any dummy value, such as x. Refer to API keys for information on creating, editing, and deleting your API keys.

Our API is an HTTPS-only API. Any non-secure requests will return an error.

API keys

Last Modified on 05/29/2024 5:27 pm EDT

To create and manage your API keys:

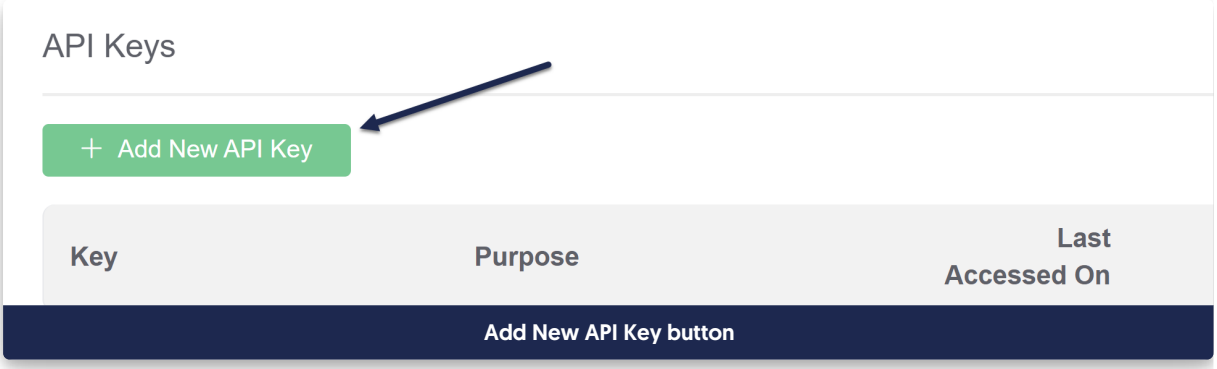
1. Click on your **profile icon/name** in the upper right.
2. Select **API** from the dropdown.

> If you do not see the API option, contact your knowledge base administrator. You must have Full Admin access to generate or edit API keys.

Create a new key

To generate a new API key:

1. Select **+ Add New API Key**.

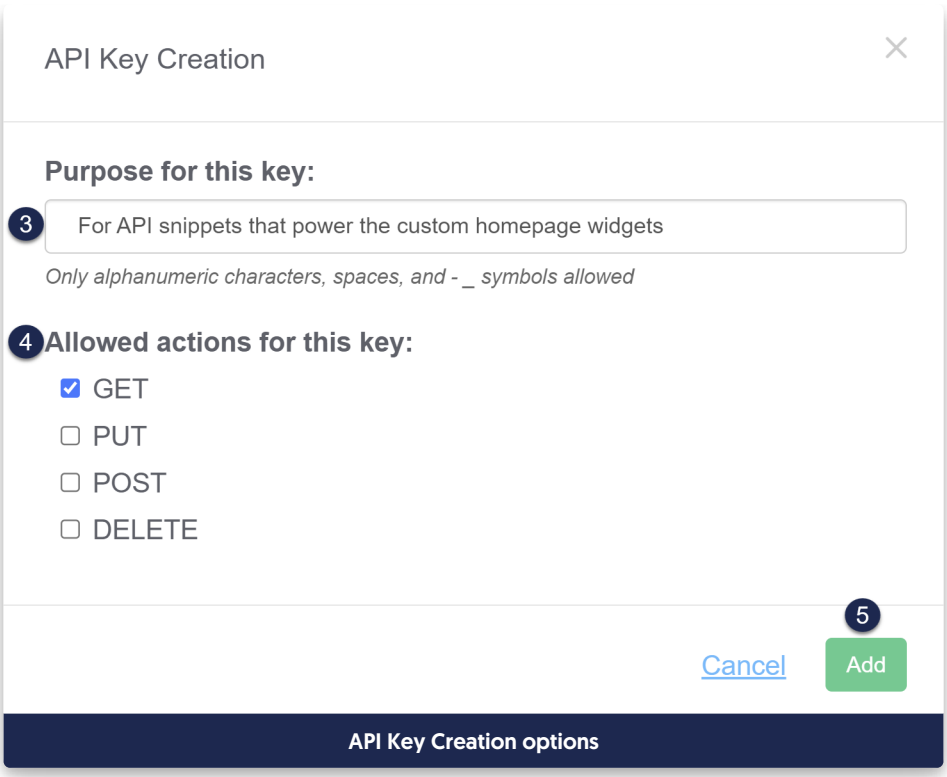


Add New API Key button

2. This will open an API Key Creation pop-up where you can configure the new API key.
3. Give your API key a **Purpose**. This should identify any integrations, processes, and so on that would help someone know what this key is used for and whether it is still used.
4. Select the permissions you want this API key to have in the **Allowed actions** section.

> Only **GET** permissions are required if you're using the API key to pull information from KnowledgeOwl. It is good practice to limit permissions to just those needed for the task.

5. Once you've finished configuring your API key, click the **Add** button to finish creation.



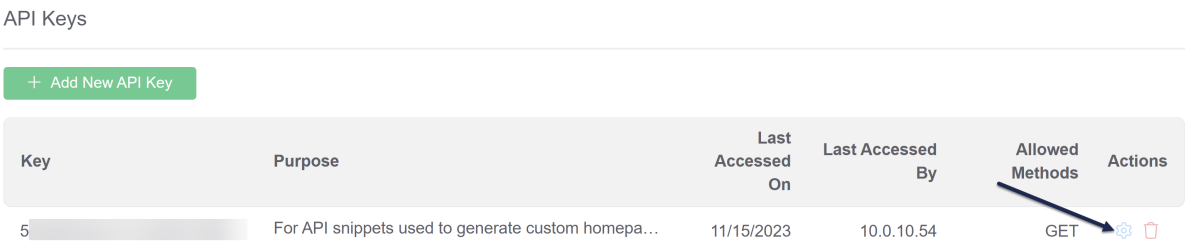
6. **KnowledgeOwl adds the key to the bottom of the list. It is now ready to use.**

Edit an existing API key

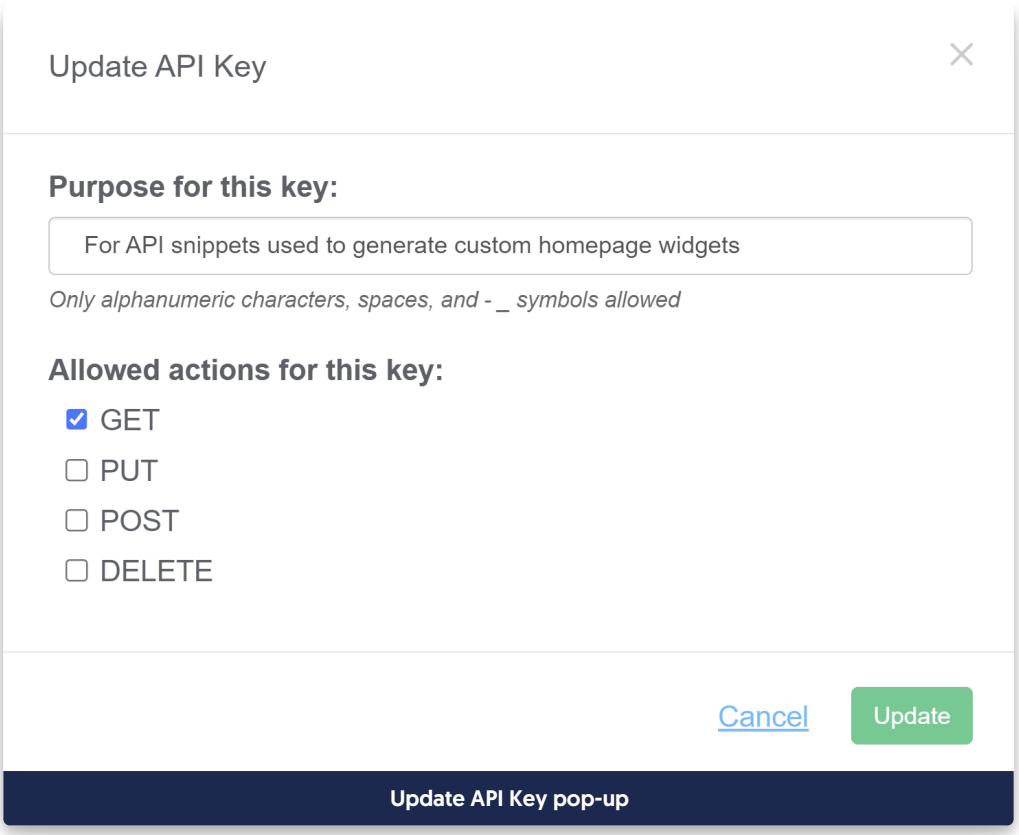
You may want to change the purpose listed for an API key, or add or remove allowed methods.

To update an existing API key:

1. **Click on the gear icon in the Actions column next to the API key you want to edit.**



2. **Make any changes to the key's purpose and allowed actions.**



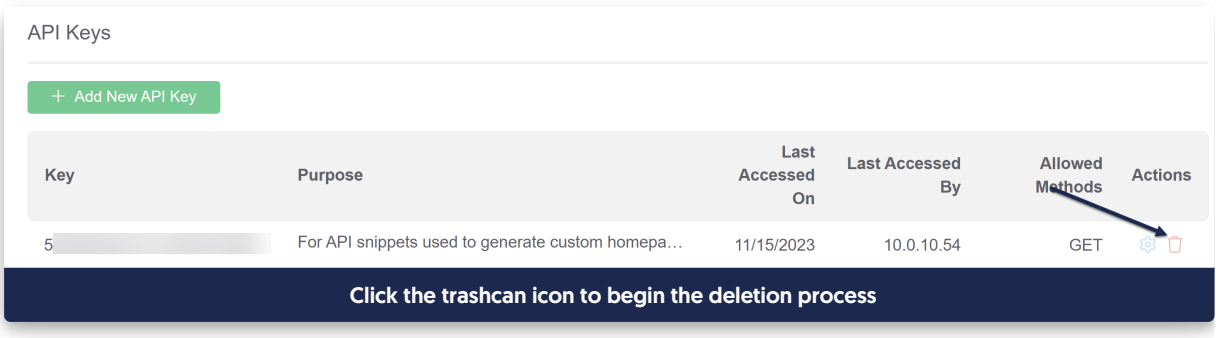
Update API Key pop-up

3. Select **Update**.

Delete a key

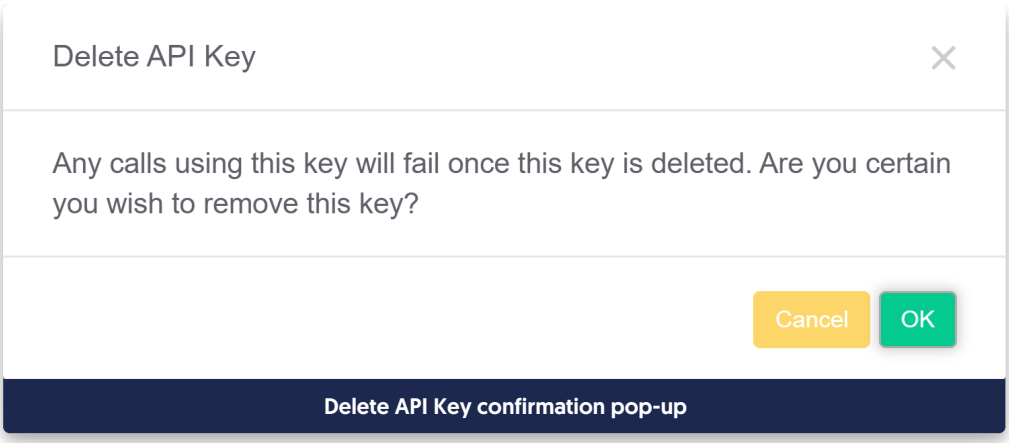
To delete an API key that is no longer needed:

1. Click the red trashcan icon to the right of the API key you want to delete.



Click the trashcan icon to begin the deletion process

2. A pop-up will appear to confirm the deletion.



Delete API Key confirmation pop-up

3. **If you're sure you want to delete the API key, select OK to confirm deletion.**
4. **The key is now deleted and all calls made using it will fail.**

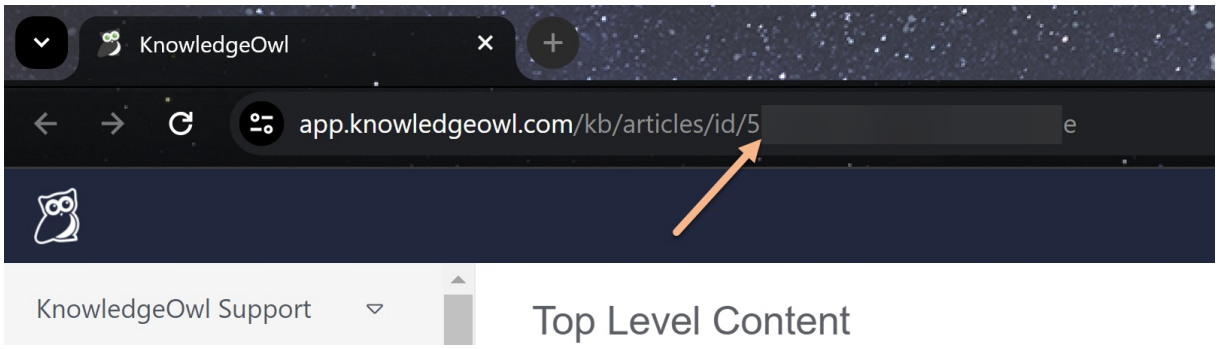
Find your knowledge base ID or project ID

Last Modified on 05/29/2024 5:28 pm EDT

Many API calls require that you pass in a knowledge base ID (usually called a project_id in the API documentation).

To find your knowledge base ID:

1. **Go to Knowledge Base > Articles.**
2. **Your knowledge base/project ID is in the URL on this page, the string of letters and numbers that appears after** `/articles/id/` **:**



API pagination and limiting results

Last Modified on 05/29/2024 5:28 pm EDT

Limit results

You can limit the number of objects returned per page in your query results. To do this, add `"limit": <number>` to your query parameters. For example, to get all articles in your knowledge base, limited to 20 objects per page, add `"limit": 20` to your query parameters.

Accessing pages

If your query returns a large amount of data, or you set a limit on results, KnowledgeOwl paginates the results and returns the first page. If your data is paginated, the response will include the following:

```
"page_stats": {
 "total_records": <number>
 "total_pages": <number>
}
```

To access later pages, you have to make multiple calls, requesting each page in turn. Add `"page": <number>`, along with any other query parameters. For example, to access the fourth page of data, include `"page": 4` in your query parameters.

API usage limits

Last Modified on 05/29/2024 5:27 pm EDT

The KnowledgeOwl API is not intended for extremely heavy use. If you anticipate making more than 2000 requests per five minutes, please contact us to discuss your requirements.

API input and output formats

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KnowledgeOwl's API accepts the following input types:

- **Standard REST HTTP headers -** `?field1=value&field2=value&array1[]=value1&array1[]=value2`
- **Application/JSON -** `'{"field1": "value", "field2": "value", "array1": ["value1", "value2"]}'`

KnowledgeOwl's API can return the following output types as specified by the call endpoint:

- **JSON (default) — https://app.knowledgeowl.com/api/head/.json**
- **JSONP — https://app.knowledgeowl.com/api/head/.jsonp?callback=**
- **HTML — https://app.knowledgeowl.com/api/head/.html**
- **PSON — https://app.knowledgeowl.com/api/head/.pson**

API date formats

Last Modified on 05/29/2024 5:27 pm EDT

For PUT or POST calls, dates can be formatted in one of two ways:

- Unix timestamps: Also known as epoch timestamps. See Unix Time Stamp if you're unfamiliar with using this format. Example: 1701745258.
- Y-m-d H:i:s format: four-digit year, two-digit month and day, military time format for GMT or its current equivalent. Example: "2023-10-05 18:48:00".

API query operators

Last Modified on 05/29/2024 5:28 pm EDT

The KnowledgeOwl API supports a selection of query operators, allowing you to add logic to the body of your API calls. This means you can do things like search for a particular name or term, or filter your results. This section lists all the available operators, with examples of how to use them.

String and array comparisons

```
//Example article object
{
 "id": "9999",
 "name": "Article 1",
 "parents": [
  "1234",
  "4321"
 ]
}
```

$in - in array

```
//Use $in to find the example article based off of the "name" field, which is a string
//This filter matches any article that has a "name" of "Article 1", OR "Article 2"
curl -u {{API Key}}:X
 -H "Content-type: application/json"
 -X GET "https://app.knowledgeowl.com/api/head/article.json"
 -d '{"name": {"$in": ["Article 1", "Article 2"]}}'
```

```
//Use $in to find the example article based off of the "parents" field, which is an array
//This filter matches any article that contains the value "1234" within the "parents" array
curl -u {{API Key}}:X
 -H "Content-type: application/json"
 -X GET "https://app.knowledgeowl.com/api/head/article.json"
 -d '{"parents": {"$in": ["1234"]}}'
```

$nin - not in array

```
//Use $nin to exclude the example article based off of the "name" field, which is a string
//This filter excludes any articles that have a "name" of "Article 1" OR "Article 2"
curl -u {{API Key}}:X
 -H "Content-type: application/json"
 -X GET "https://app.knowledgeowl.com/api/head/article.json"
 -d '{"name": {"$nin": ["Article 1", "Article 2"]}}'
```

```
//Use $nin to exclude the example article based off of the "parents" field, which is an array
//This filter excludes any articles that have the value "1234" within the "parents" array
curl -u {{API Key}}:X
 -H "Content-type: application/json"
 -X GET "https://app.knowledgeowl.com/api/head/article.json"
 -d '{"parents": {"$nin": ["1234"]}}'
```

$ne - not equal to

```
//Use $ne to find all articles that do not have a "status" of "deleted"
curl -u {{API Key}}:X
  -H "Content-type: application/json"
  -X GET "https://app.knowledgeowl.com/api/head/article.json"
  -d '{"status": {"$ne": "deleted"}}'
```

$regex - regular expression string comparison

```
//Use regex to find the example article based off of the "name" field, which is a string
//This filter matches any article that contains the string "article" in the "name" field
curl -u {{API Key}}:X
  -H "Content-type: application/json"
  -X GET "https://app.knowledgeowl.com/api/head/article.json"
  -d '{"name": {"$regex": "article", "$options": "i"}}'

//The "$options" value of "i" modifies the regular expression to be case insensitive
//Available regex modifiers are "i", "m", "x", and "s"
```

Date and numeric value comparisons



Dates are returned via the API in human readable format based on the Timezone and Date Format settings in your knowledge base.
When filtering API objects based off of dates, the API expects unix timestamps to be passed in.

```
//Example article object
{
  "id": "1234",
  "index": 2,
  "date_created": "11/07/2015 11:06 am GMT", //Equal to 1446894360 unix timestamp
}
```

$gt - greater than

```
//Use $gt to include the example article based off of the "index" field, which is numeric
curl -u {{API Key}}:X
  -H "Content-type: application/json"
  -X GET "https://app.knowledgeowl.com/api/head/article.json"
  -d '{"index": {"$gt": 1}}'
```

```
//Use $gt to include the example article based off of the "date_created" field, which is a timestamp
//1446807960 is equal to 11/06/2015 11:06 am GMT
curl -u {{API Key}}:X
  -H "Content-type: application/json"
  -X GET "https://app.knowledgeowl.com/api/head/article.json"
  -d '{"date_created": {"$gt": "1446807960"}}'
```

$gte - greater than or equal to

```
//Use $gte to include the example article based off of the "index" field, which is numeric
curl -u {{API Key}}:X
  -H "Content-type: application/json"
  -X GET "https://app.knowledgeowl.com/api/head/article.json"
  -d '{"index": {"$gte": 2}}'
```

```
//Use $gte to include the example article based off of the "date_created" field
//1446894360 is equal to 11/07/2015 11:06 am GMT
curl -u {{API Key}}:X
  -H "Content-type: application/json"
  -X GET "https://app.knowledgeowl.com/api/head/article.json"
  -d '{"date_created": {"$gte": "1446894360"}}'
```

$lt - less than

```
//Use $lt to include the example article based off of the "index" field, which is numeric
curl -u {{API Key}}:X
  -H "Content-type: application/json"
  -X GET "https://app.knowledgeowl.com/api/head/article.json"
  -d '{"index": {"$lt": 3}}'
```

```
//Use $lt to include the example article based off of the "date_created" field
//1446980760 is equal to 11/08/2015 11:06 am GMT
curl -u {{API Key}}:X
  -H "Content-type: application/json"
  -X GET "https://app.knowledgeowl.com/api/head/article.json"
  -d '{"date_created": {"$lt": "1446980760"}}'
```

$lte - less than or equal to

```
//Use $lte to include the example article based off of the "index" field, which is numeric
curl -u {{API Key}}:X
  -H "Content-type: application/json"
  -X GET "https://app.knowledgeowl.com/api/head/article.json"
  -d '{"index": {"$lte": 2}}'
```

```
//Use $lte to include the example article based off of the "date_created" field
//1446894360 is equal to 11/07/2015 11:06 am GMT
curl -u {{API Key}}:X
  -H "Content-type: application/json"
  -X GET "https://app.knowledgeowl.com/api/head/article.json"
  -d '{"date_created": {"$lte": "1446894360"}}'
```

Logic filtering

```
//Example article object
{
  "id": "9999",
  "name": "Article 1",
  "index": 10,
  "status": "deleted",
}
```

$and - must match ALL specified filters

```
//Use $and to include the example article based off of multiple filters
//Article must have an "index" that is greater than 1 AND less than 20
curl -u {{API Key}}:X
  -H "Content-type: application/json"
  -X GET "https://app.knowledgeowl.com/api/head/article.json"
  -d '{"$and": [{"index": {"$gt": 9}}, {"index": {"$lt": 20}}]}'
```

$or - must match ONE of the specified filters

```
//Use $or to include the example article based off of multiple filters
//Article can either have an "index" that is greater than 20 OR less than 11
curl -u {{API Key}}:X
  -H "Content-type: application/json"
  -X GET "https://app.knowledgeowl.com/api/head/article.json"
  -d '{"$or": [{"index": {"$gt": 20}}, {"index": {"$lt": 11}}]}'
```

$nor - must NOT match ANY of the specified filters

```
//Use $nor to include the example article based off of multiple filters
//Article must NOT have an "index" that is greater than 11 NOR less than 9
curl -u {{API Key}}:X
  -H "Content-type: application/json"
  -X GET "https://app.knowledgeowl.com/api/head/article.json"
  -d '{"$nor": [{"index": {"$gt": 11}}, {"index": {"$lt": 9}}]}'
```

API calls in snippets

Last Modified on 05/29/2024 5:27 pm EDT

Sometimes you might want to extend KnowledgeOwl's built in functionality by utilizing client side API calls in your knowledge base.

Previously, this involved constructing an AJAX call that contains a KnowledgeOwl API key for authentication. However, by exposing your API key on the client side (even when restricted to GET access only), you are opening yourself up to unintended reader behavior.

KnowledgeOwl API Merge Code

To prevent this issue, we have added the ability to construct an API merge code within a snippet's content. On page render, the merge code will be replaced with a unique, single use URL that does not contain your API key or any account specific information.

Constructing the Merge Code

Let's take a look at how to construct this merge code and then what we can do with it. Below is the template for the merge code.

```
[ko_api(API Object|{JSON API filter})]
```

If we break the above template down into its parts, we get the following 3 required pieces.

1. **The outer wrapper: [ko_api( )]**
   This wrapper and everything within it will be replaced server side with a unique URL at the time of page rendering.

2. **The API Object**
   The first part of the inner required information denotes which API object you are going to be querying. For example, if you want query for categories, you would use **category** followed by the pipe symbol **|** .

3. **JSON API Filter**
   The second part of the inner required information needs to be a JSON formatted string containing a valid API filter. Let's say we want to query for the 5 newest categories in our knowledge base that aren't deleted. We can construct our JSON string like so:

   ```
   //project_id = Knowledge base ID
   {"project_id": "123456", "status": "active", "limit": 5, "sort": {"date_created": 1}}
   ```

When we put the parts from above together, we get the following fully constructed merge code:

```
[ko_api(category|{"project_id": "123456", "status": "active", "limit": 5, "sort": {"date_created": 1}})]
```

Knowledge Base Variables

The API merge code is replaced server side so you will not be able to use Javascript variables within it. However, we have created the following variables that you can use to reference information about the current page and the current reader that is logged in:

Variable Name	Variable Value	Example JSON
%cur_kb_id%	The ID of the knowledge base that is currently being viewed.	"project_id": "%cur_kb_id%"
%cur_cat_id%	If viewing a category: returns the ID of the category currently being viewed; If viewing an article: returns the ID of the category in which the article is contained. If the article is in a subcategory, this is the category *immediately above* this article in the hierarchy, not it's ultimate top-level parent.	"category": "%cur_cat_id%"
%cur_top_cat_id%	The ID of the top most parent category that the current article or category is in.	"category": "%cur_top_cat_id%"
%cur_parent_cat_ids%	Array of all parent category IDs that the current article or category is in.	"category": {"$in": "%cur_parent_cat_ids%"}
%cur_art_id%	The ID of the article that is currently being viewed	"id": "%cur_art_id%"
%cur_art_tags%	Array of tag IDs that are in use on the currently viewed article	"tags": {"$in": "%cur_art_tags%"}
%cur_art_permalink%	The permalink of the currently viewed article	"url_hash": "%cur_art_permalink%"
%cur_reader_id%	The ID of the currently logged in reader; will filter results by content that reader has access to; will not work for authors who are also readers	"reader_id": "%cur_reader_id%"
%cur_reader_groups%	Array of reader groups IDs that the currently logged in reader is assigned to	"reader_roles": "%cur_reader_groups%" *NB: The merge code itself surrounded by " is all you need - an $in comparison is already included for you in the merge code*
%cur_reader_username%	The username of the currently logged in reader	"username": "%cur_reader_username%"

Variable Name	Variable Value	Example JSON
%cur_search_term%	The "phrase" parameter in the URL	"phrase": "%cur_search_term%"

Using the Merge Code

Now that we have our merge code, let's look at how we can use it within our snippet content to get the information requested. Below is a script that console logs the information returned from our API call.

```
<script>
 $(function() {
  $.get('[ko_api(category|{"project_id": "123456", "status": "active", "limit": 5, "sort": {"date_created": 1}})]',
  function(apiData) {
       //do something with the returned data
       console.log(apiData);
  }).fail(function(error) {
   //uh oh something went wrong. Alert the end-user or otherwise handle the error
  });
 });
</script>
```

As you can see, the merge code is used in place of the AJAX URL, but the rest of the jQuery code remains exactly the same. When the above code is rendered to the page, the merge code is replaced with a safe, valid URL, and results in something like the following.

```
<script>
 $(function() {
  $.get('/help/ko-api/mid/9999aaaaadsfsdfsdf',
  function(apiData) {
       //do something with the returned data
       console.log(apiData);
  }).fail(function(error) {
   //uh oh something went wrong. Alert the end-user or otherwise handle the error
  });
 });
</script>
```

Now let's use some of the knowledge base variables listed above to get all of the other articles that are in the currently viewed article's category.

```
<script>
 $(function() {
  //get all published or needs review articles in the current category except for the one currently being viewed
  $.get('[ko_api(article|{"project_id": "%cur_kb_id%", "status": {"$in": ["published", "review"]}, "category": "%cur_cat_i
  function(apiData) {
       //do something with the returned data
       console.log(apiData);
  }).fail(function(error) {
   //uh oh something went wrong. Alert the end-user or otherwise handle the error
  });
 });
</script>
```

Working with article status

If you're pulling a list of articles via API snippet, the odds are pretty good that you're going to be using the status field. While most of our other API endpoints have a status field that is "active" or "deleted", the publishing status on articles has two statuses that could be considered active: Published ("published" in the API) and Needs Review ("review" in the API).

If you'd like to filter your article API call to get status, instead of using "status": "active" here, you'd want to use an in operator and look for the status to be in one of those two: `"status": {"$in": ["published", "review"]}` . You can see an example of this in action in the final code block in the section before this one.

API calls with paged results

Sometimes your API call may have multiple pages of results. In this case, we will return the next API call URL as part of the returned data. The URL will be located in the "page_stats" array like so:

```
page_stats: {
  total_records: 203
  total_pages: 3
  next_page: 2
  next_page_url: /help/ko-api/mid/9999aaaaadsfsdfsdf
}
```

Here's a template to get you started with paged API snippet calls:

```
<script>
 $(function(){
  //first page of results API call
  var firstUrl = '[ko_api(article|{"project_id": "%cur_kb_id%","_fields": ["name"], "limit": 75})]';

  //function to get multiple pages of results from API
  var getArticles = function(curUrl) {
   $.get(curUrl, function(data) {
    console.log(data);
    $.each(data['data'], function(index, value){
     //do something with api objects
    });
    //now fetch the next page of results if there is one
    //using the URL returned from the previous API call
    if(data['page_stats']['next_page_url'])
     getArticles(data['page_stats']['next_page_url']);
   }).fail(function(error) {
//you failed!
    console.log(error);
   });
  }

  //get the first page of results;
  getArticles(firstUrl);
 });
</script>
```

Requirements for use



API merge codes can ONLY be used for GET calls. Attempts to POST, PUT, or DELETE will return an error.

You must have at least one active API key in your account with **ONLY** GET permission. If you do not have an available API key that meets this requirement, the merge code URL will return an error.

The JSON string containing the API filter must contain a valid knowledge base ID in the format of {"project_id": "1234"}.

DO NOT include your API key in the merge code JSON. If you include an API key in the JSON, the merge code URL will return an error.

API calls in snippets **do not show** in article Preview mode. You'll need to publish the article to view the results of the API snippet.

Working with APIs: Introduction

Last Modified on 05/29/2024 5:28 pm EDT

This article provides a basic introduction to APIs, focused on REST APIs. It assumes no prior knowledge. For an introduction to the KnowledgeOwl API, refer to Using the KnowledgeOwl API, and for KnowledgeOwl API reference documentation, refer to Endpoint reference.

This article is designed to be read through in order. Some later sections rely on knowledge from earlier sections.

What is an API?

Last Modified on 05/29/2024 5:28 pm EDT

API stands for "application programming interface".

In basic terms, APIs allow computer programs to talk to each other. The process is broadly the same regardless of the type of API:

> 1. **A client application initiates an API call** to retrieve information—also known as a *request*. This request is processed from an application to the web server via the API's Uniform Resource Identifier (URI) and includes a request verb, headers, and sometimes, a request body.
> 2. **After receiving a valid request**, the API makes a call to the external program or web server.
> 3. **The server sends a *response*** to the API with the requested information.
> 4. **The API transfers the data** to the initial requesting application.
>
> *- from How an API works by IBM*

APIs communicate between programs in a similar way to how people communicate in the physical world. Consider a scenario where you are the writer maintaining your product's knowledge base, and the following set of interactions occur:

1. A customer comes looking for information and can't find it, so they send a support request.
2. In turn, support contact you and ask you to produce an article with the information.
3. The request from support didn't contain enough information for you to be sure what the requirements are, so you reply to them asking for more details (this is similar to an API sending an error message when it receives a badly-formed request).
4. Support send over the necessary information. You can now prepare an article.
5. You need more detailed information about the product, so you contact a subject matter expert who can give you the details you need.
6. The SME sends over the information you requested.
7. You take the information from the SME (and your own knowledge), and write an article that meets the requirements sent by the support team.
8. You contact support and let them know the article is published.
9. Support respond to the customer, providing the article.

Each of those interactions is like an API call, requesting or sending information.

APIs are everywhere. Consider a common example - making an online purchase. This process could involve several APIs to communicate between different services and companies:

- When you first go to the shop, an API may be used to load the product list and information.
- There may be another API handling authentication - perhaps using an external provider, such as logging in using Google.
- Paying for your purchases almost certainly involves another API, this time one belonging to the payment service. That service in turn likely uses your bank's API.

APIs also simplify development. For example, say you want to write a program that interacts with KnowledgeOwl. Our API provides a defined, standardized way for your program to communicate with KnowledgeOwl. You don't need to know exactly how KnowledgeOwl works behind the scenes. Your program doesn't directly access our servers or databases - instead, it calls our API. This is simpler and more secure.

There are different types of APIs. This article focuses on web APIs, and in particular REST APIs.

What is a REST API?

Last Modified on 05/29/2024 5:27 pm EDT

REST stands for "representational state transfer".

A REST API is a type of API designed for use on the web. It can perform actions such as getting or updating information in a database. It uses HTTP verbs, or methods, to indicate the type of action.



HTTP is a key piece of the internet. It is a protocol that allows web browsers and servers to talk to each other. Read more about HTTP in the Mozilla docs.

The methods used in the KnowledgeOwl API are:

- GET - fetch data. For example, you could GET a list of all the tags in your knowledge base.
- PUT - update data. You could use this to update the status of an article, for instance.
- POST - create a new object or piece of data. For example, create a new category.
- DELETE - remove an object. For example, delete an article.



The KnowledgeOwl API can be treated like REST API, although it does not strictly conform to REST API behavior at all times. Refer to Using the KnowledgeOwl API and our Endpoint reference for information on our API.

Calling an API: terminology and tools

Last Modified on 05/29/2024 5:27 pm EDT

Accessing an API, using GET, POST, and so on, is known as **calling** the API. To call an API, you make a **request**. You need to know the **endpoint** you want to use. An endpoint usually provides functionality around a particular **object**, allowing you to access and update its **parameters**.

Request: an API request is a call to a server, using the format required by the API.

Endpoint: in a REST API, the endpoint is a URL. In the KnowledgeOwl API, we have endpoints such as https://app.knowledgeowl.com/api/head/article.json, (which lets you work with articles), https://app.knowledgeowl.com/api/head/tag.json (which lets you work with tags), and so on.

Objects and **parameters**: an object can be thought of as a collection of parameters. For example, the article object parameters include things like project_id (the ID of the knowledge base that the article belongs to), name (the article title), and category (the ID of the category that the article belongs to). These parameters may correspond to database fields.

There are several ways to call an API:

- From your code: for example, when building a website, you might use JavaScript to fetch data.
- With a GUI tool like Postman: there are lots of tools out there to work with APIs. Postman is used to design and test APIs. You can also use it to quickly make an API call.
- Using a command line tool like curl: if you have curl installed on your computer, you can open a terminal (such as PowerShell or Cmd on Windows, or the Mac Terminal) and enter a curl command to call an API.

This guide will briefly introduce Postman and curl.

Calling an API: curl

Last Modified on 05/29/2024 5:27 pm EDT

Let's look at how to make an API request using curl.

If you want to follow along, you need an API key. An API key is a way of authenticating API users. It makes sure that only people with the key can access the data.

We'll start by going through the steps to make a request, then take a closer look at the elements of the request.



It's a good idea to create a separate knowledge base, or at least a hidden test area in your existing one, to experiment with. The example here only retrieves information, so it shouldn't make any changes, but it's always safer to learn and experiment away from your live knowledge base.



If you are on Windows, there are two issues with using curl:

Curl is only available using Command Prompt or PowerShell Core (PowerShell 6 or 7). If you run curl --version and get an error "curl : The remote name could not be resolved: '--version'" you are probably using PowerShell 5 or earlier. Try using PowerShell Core.

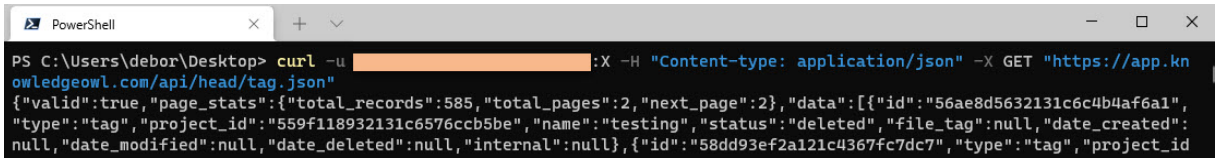
By default, curl is aliased to Invoke-WebRequest, a PowerShell cmdlet (command). This can cause errors (for example, if you just run the example in the instructions below, you will receive a 500 error due to malformed data in the section after -d)

1. First, check you have curl installed: open your terminal and type `curl --version`. Hit `Enter`. If curl is installed and working, it should tell you some information about the version you have. If curl is not installed, you can download it.
2. We're going to get a list of all the active (available) tags in your knowledge base. If you don't have any tags, create a couple to use as a test.
3. Copy this curl request into your terminal. It will get all the active tags in your knowledge base:

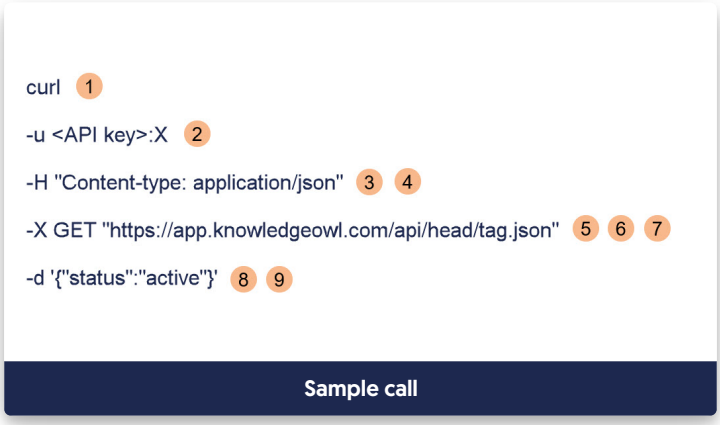
```
curl -u <API key>:X -H "Content-type: application/json" -X GET "https://app.knowledgeowl.com/api/head/tag.json"
```

4. Replace `<API key>` with your API key.
5. Hit `Enter`. You should see a list of all the tags in your knowledge base. It may take a moment to appear,

especially if you have a large number of tags. It should look something like this:



Let's take a close look at the details of the API request:



1. `curl` tells the command line to use the program called curl.
2. `-u` tells curl that the next bit of information relates to the user. It is followed by the API key and password.
3. `-H` tells curl that the next bit of information sets the request header.
4. `"content-type: application/json"` lets the program we're calling (in this case, KnowledgeOwl's backend) know that the information is in JSON format.

   If you're new to JSON, check out this introduction to JSON on w3schools.

5. `-X` tells curl we want to use a custom request method.
6. `GET` tells KnowledgeOwl we're making a GET request (fetching data).
7. Then we supply the endpoint we want to call, in this case: `https://app.knowledgeowl.com/api/head/tag.json`
8. `-d` tells curl that the next information contains data we want to include in the request.
9. And finally we have the data itself, in JSON format, filtering for just tags with `'status':'active'`.

Curl options are case sensitive. For example, -H sets the request headers, while -h will open the curl help page.

Calling an API: Postman

Last Modified on 05/29/2024 5:27 pm EDT

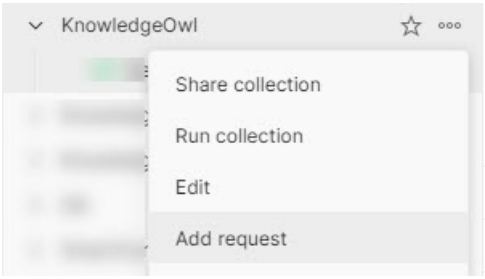
Let's look at how to make an API request with Postman.

You'll need to download and install Postman, and sign up for an account. The free tier has everything needed for this tutorial. You also need an API key. An API key is a way of authenticating API users. It makes sure that only people with the key can access the data.

We'll start by going through the steps to make a request, then take a closer look at the elements of the request.

It's a good idea to create a separate knowledge base, or at least a hidden test area in your existing one, to experiment with. The example here only retrieves information, so it shouldn't make any changes, but it's always safer to learn and experiment away from your live knowledge base.

1. Open Postman.
2. If you have used Postman before, you may be a member of several workspaces. If necessary, switch to your own workspace by selecting **Workspaces** > **My Workspace**.
3. Make sure **Collections** is selected.
4. Select **New**. Postman opens a modal allowing you to create new requests, collections, and other Postman features.
5. In the modal, select **Collection**. Postman creates a new collection.
6. Give your collection a name, for example, "KnowledgeOwl".
7. On the collection's **Authorization** tab, select **Basic Auth** as the authentication type.
8. Enter your API key in the **Username** field, and any value (for example, X) in the **Password** field. Save your changes.
9. Select the menu icon on the collection, then select **Add request**. Postman creates a new request and opens it for editing.



10. Give the request a name. We're going to get a list of all the active (available) tags in your knowledge base, so the name could be something like "Get all active tags". If your knowledge base doesn't have any tags, you'll need to create a couple to test.

11. In the **Enter request URL** field, paste in https://app.knowledgeowl.com/api/head/tag.json.

12. Select the **Body** tab.

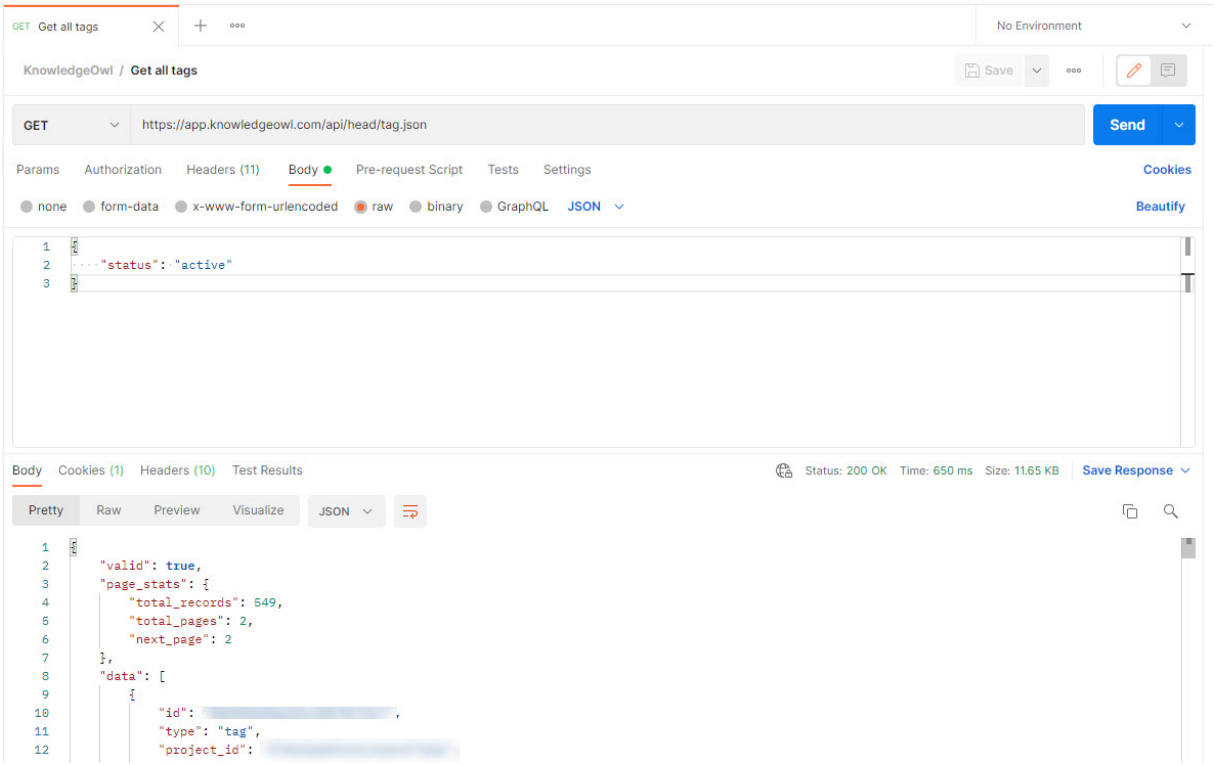
13. Set the data type: select **raw**, then a dropdown appears with **Text** in it. Change this to **JSON**.

> If you're new to JSON, check out this introduction to JSON on w3schools.

14. Enter the following in the body text box:

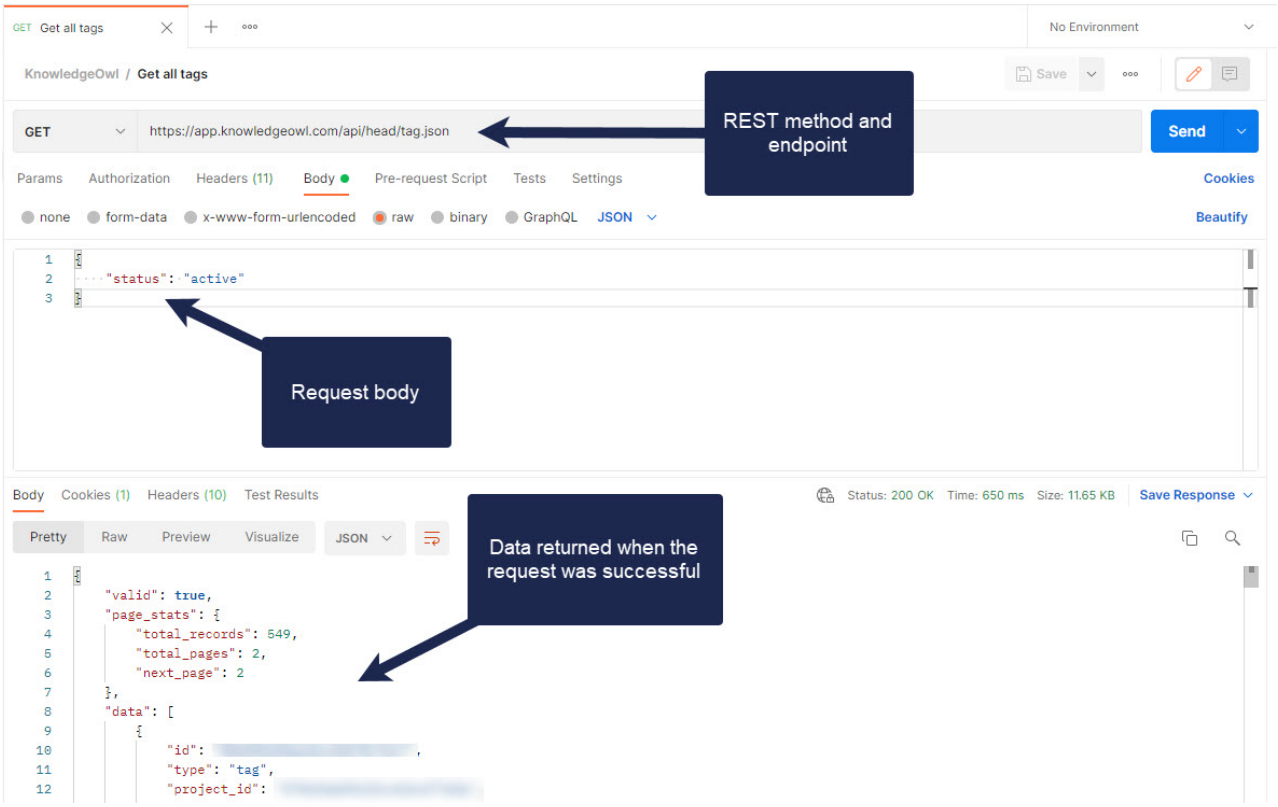
```
{ "status": "active" }
```

15. Select **Send**. Postman calls the KnowledgeOwl API, and displays the result.



Let's take a closer look at the details of the API request:

- We set up authentication on the collection. All requests within the collection inherit that setting.
- In the request itself, there are just two settings to think about for this request: the method (GET) and the endpoint URL.


GET Get all tags
No Environment
KnowledgeOwl / Get all tags
Save
GET
https://app.knowledgeowl.com/api/head/tag.json
REST method and endpoint
Send
Params
Authorization
Headers (11)
Body
Pre-request Script
Tests
Settings
Cookies
none
form-data
x-www-form-urlencoded
raw
binary
GraphQL
JSON
Beautify
"status": "active"
Request body
Body
Cookies (1)
Headers (10)
Test Results
Status: 200 OK
Time: 650 ms
Size: 11.65 KB
Save Response
Pretty
Raw
Preview
Visualize
JSON
Data returned when the request was successful
"valid": true,
"page_stats": {
"total_records": 549,
"total_pages": 2,
"next_page": 2
},
"data": [
{
"id":
"type": "tag",
"project_id":

Working with APIs: Learn more

Last Modified on 05/29/2024 5:28 pm EDT

There are lots of resources out there to learn more about APIs. Here are a few of our favorites.

KnowledgeOwl API

Read more about our own API in Using the KnowledgeOwl API and our Endpoint reference.

General articles and tutorials about APIs

IBM - Application Programming Interface (API) - an overview of APIs.

Zapier - An Introduction to APIs - an introductory-level course on web APIs.

Documenting APIs

Tom Johnson - Documenting APIs: A guide for technical writers and engineers - a substantial course on REST APIs with a documentation focus. No programming required, though basic HTML, CSS, and JavaScript may be helpful.

Learn how to document your own REST API with KnowledgeOwl: REST API documentation.

JSON

Introduction to JSON - w3schools

Cookbook usage instructions

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The cookbook contains examples of how to use the API. Our aim is to provide examples for a range of common tasks, as well as help getting started with more complex operations. If this is your first time using the KnowledgeOwl API, refer to Using the KnowledgeOwl API for guidance on authentication and pagination.

All our recipes include a curl example, which you can copy-paste. Make sure to replace any placeholder text with your own values. Placeholder text is indicated with angle brackets, like this: <your-value-here>

Wherever possible, the recipes use the minimum possible parameters. Most recipes either just use the parameters required for the request to succeed, or only use ones we believe you will always want to include. For example, the Create a category recipe shows how to create a category using just the required parameters. You will often want to set more parameters. Refer to the Endpoint reference for a full list of available parameters for each endpoint.

We also provide a Postman Collection:

▶ Run in Postman

We welcome feedback and requests. Please contact support to request an example, or give any other feedback. We would also love to know what programming languages you are using to work with our API.

Try out our Postman collection

We recommend Postman for trying out API requests. Once you have signed up for a free account, you can get our Postman Collection

▶ Run in Postman

This imports a collection containing all our cookbook examples.

You need to set up the collection with your own API key and knowledge base ID.

1. Select **New > Environment** to create a new environment. A Postman environment lets you use variables for things like your API key and knowledge base ID. Our collection is set up to use certain variable names, allowing you to add your credentials in one place (your environment), and have them work throughout the collection.

2. Set up the environment:

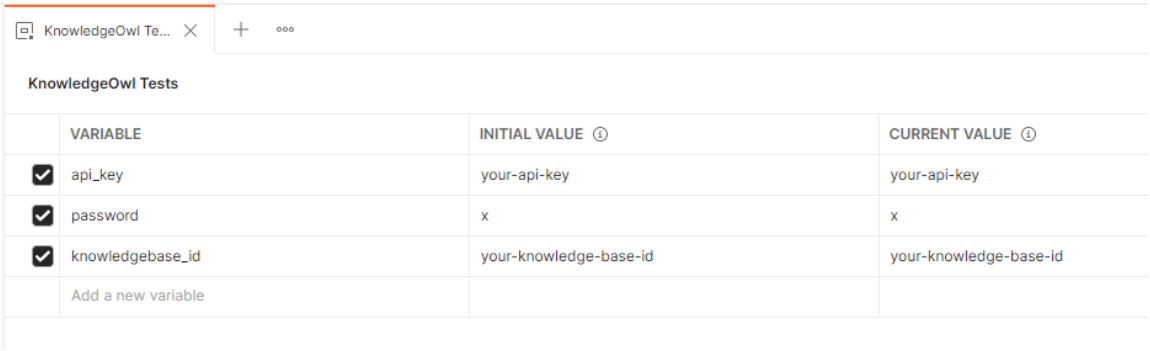
    a. Give it a name. We called ours "KnowledgeOwl Tests" for these examples, but you can use any name you like.

    b. Create three variables. These are used in all requests:

        - api_key

- password
- knowledgebase_id

c. Add your credentials. Your environment should look like this:

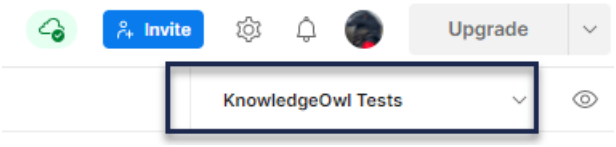


d. Depending on which examples you want to test, add more variables:

Variable	Used in . . .	Value
category_parent_id	Create a new subcategory	The category ID of the parent category
file_name	Upload a new file to the file library, Update a file in the file library	File name, including suffix. For example, "my-image.png"
file_id	Update a file in the file library	The KnowledgeOwl ID for the file you want to update

3. Save the environment with ctrl + s.

4. Select the new environment in the **Environment** drop down:



Create a category with the API

Last Modified on 05/29/2024 5:27 pm EDT

Create a new top level category:

```
curl --location --request POST 'https://app.knowledgeowl.com/api/head/category.json' \
--header 'Authorization: Basic <your-api-key>' \
--header 'Content-Type: application/json' \
--data-raw '{
    "project_id": "<your-knowledge-base-id>",
    "name": {"en": "<your category title>"},
    "status": "active"
```

Create a new subcategory:

```
curl --location --request POST 'https://app.knowledgeowl.com/api/head/category.json' \
--header 'Authorization: Basic <your-api-key>' \
--header 'Content-Type: application/json' \
--data-raw '{
    "project_id": "<your-knowledgebase-id>",
    "name": {"en": "<your category title>"},
    "status": "active",
    "parent_id": "<your-parent-category-id>"
}
```

Upload and edit files

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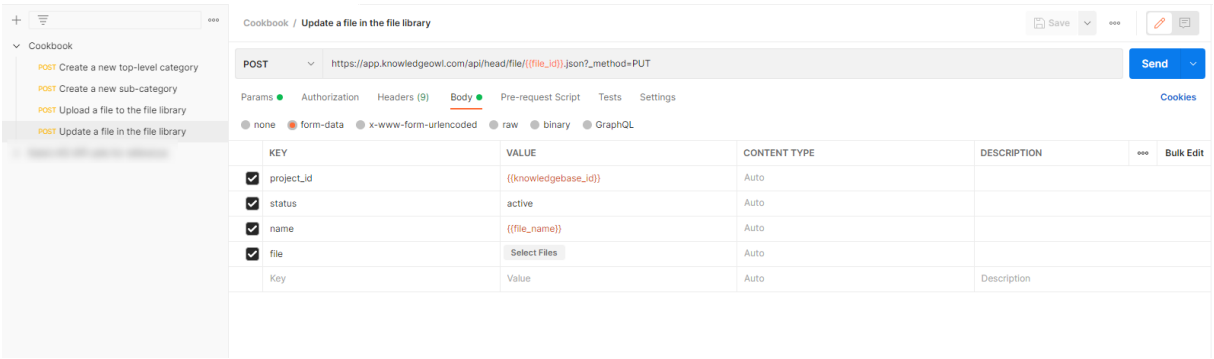
To use the examples we provide in our Postman collection, you must do some extra setup:

1. Either place the file you want to upload in your Postman working directory, or enable reading all files. Refer to the Postman documentation for more information.

2. Open the example you want to use, and choose the file you want to upload by clicking **Select Files**.

3. To update a file, either add the ID of the file you want to replace to the file_id environment variable, or place it directly in the URL, in place of.



Upload a new file to the file library

```
curl --location --request POST 'https://app.knowledgeowl.com/api/head/file.json' \
--header 'Authorization: Basic <your-api-key>' \
--form 'project_id="<your-knowledge-base-id>"' \
--form 'status="active"' \
--form 'name="<file.suffix>"' \
--form 'file=@"<path/to/file.suffix>"'
```

Update a file in the file library

As with all PUT (update) requests to the KnowledgeOwl API, you must specify the ID of the object you want to update as part of the URL endpoint. In this case, the URL endpoint looks like:
`https://app.knowledgeowl.com/api/head/file/<file_id>.json`

However, due to some constraints on how KnowledgeOwl's backend infrastructure works, uploading a new file via the API to replace an existing file must be sent as a POST request instead of a PUT.

In order to signify that the request should be treated as a PUT (update) despite being sent as a POST (create), the parameter "_method=PUT" must be included.

If "_method=PUT" is missing from the request body, the API will return an error, because object IDs should not normally be included in POST requests.

If the request is sent as a PUT request instead of POST, the file meta data such as the "name" field will be updated, but the file content itself will be untouched.

Here is the curl request:

```
curl --location --request POST 'https://app.knowledgeowl.com/api/head/file/<your-file-id>.json?_method=PUT' \
--header 'Authorization: Basic <your-api-key>' \
--form 'project_id="<your-knowledge-base-id>"' \
--form 'status="active"' \
--form 'name="<file.suffix>"' \
--form 'file=@"<path/to/file.suffix>"'
```

Update version metadata

Last Modified on 05/29/2024 5:27 pm EDT

In October 2023, we added a number of additional metadata fields to versions:

- **created_author**: The ID of the author who created the version
- **date_activated**: The date the version was activated (if applicable)
- **activating_author**: The ID of the author who activated the version
- **date_deactivated**: The date the version was deactivated (if applicable, by activating a different version)
- **deactivating_author**: The ID of the author who deactivated the version

These fields are then used to populate the version PDF.

Since these fields didn't exist before October 2023, though, you can see different metadata depending on when the version was created, activated, or deactivated:

- **Version created before 11 October 2023**
  - No created_author
  - If activated and/or deactivated before 11 October 2023, no date_activated, activating_author, date_deactivated, or deactivating_author.
  - Activation and deactivation fields will be populated if the activation/deactivation action occurred after 11 October 2023.
- **Version created after 11 October 2023**
  - All fields will be populated, including created_author.

If you want to update pre-existing versions to have any of these fields, you can use the API to do this. This step is **only** necessary if you want to populate historical data for versions that existed before 11 October 2023.

For those of you familiar with APIs, you'd use a PUT call against the articleversion endpoint to update things.

If you're unfamiliar with APIs but want to make some updates to pre-existing versions, we've put together a Postman collection that has preformatted calls you can use. You'll need a free Postman account to be able to use the collection. Click the button below to get started with the collection.

▶ Run in Postman

Initial setup

Once you have forked or imported the collection, you'll need to complete some initial setup so you can work with the collection.

1. In Postman, click on the **Versions** collection
2. In the main pane, click on the **Variables** tab. These variables pass through to all of the API calls in the collection.
3. First, let's update the api-key variable:
   a. In KnowledgeOwl, go to **Your Account > API**. You'll need an API key that has appropriate

permissions (GET to run the first two calls; PUT to run the second two calls).

b. Either copy an existing key that has appropriate permissions or generate a new one. See API keys for more information.

c. Copy that API key from KnowledgeOwl. Paste your API key into the `api-key` variable's **initial** and **current value**.

d. **Save** the collection (Ctrl+S works!). You should not need to update this again.

4. Next, let's update the kb-id variable:

a. In KnowledgeOwl, get the ID of the knowledge base you're going to be working with. See Find your knowledge base ID or project ID for more info.

b. Copy that ID.

c. In Postman, in Versions > Variables, paste your knowledge base ID into the `kb-id` **initial** and **current value**.

d. **Save** the collection. You should not need to update this again, unless you're working in multiple KBs.

Using the collection

As you use the collection, you'll need to update the article_id and/or version_id variables to view or update versions. You can do this following the same process we used above in the initial setup: click on the Versions collection, open the Variables tab, then paste the appropriate ID in.

To find an article ID:

1. Open the article for editing.
2. Copy the portion of the URL that comes after /aid. This is the article's ID.
3. In Postman, Versions > Variables, paste that ID in as the **current_value** of the `article_id` variable.

To find a version ID, you can either use the API or the editor:

Version ID API instructions

1. Update the article_id variable with the ID of the article whose version you want to update.
2. Click to open the **View all versions for an article** GET call in the collection.
3. Hit the **Send** button.
4. The API's output will appear in the window below. Find the version you're looking for and copy the ID.
5. In Versions > Variables, paste that ID in as the **current_value** of the `version_id` variable.
6. We recommend running the **View metadata for single version** GET call to confirm you have the correct

version_id before you make any other changes!

Version ID editor instructions

1. Open the article for editing.
2. Use the versions menu to open the version you're interested in.
3. Copy the portion of the URL that comes after /language/en/version/. This is the version's ID.
4. In Postman, Versions > Variables, paste that ID in as the **current_value** of the `version_id` variable.
5. We recommend running the **View metadata for single version** GET call to confirm you have the correct version_id before you make any other changes!

Update a version's metadata

Once you've updated the version_id variable and confirmed that the **View metadata for single version** call is returning the correct version, you are ready to update some metadata for that version! We've pre-built two calls for this. The calls are formatted slightly differently to handle different date formats:

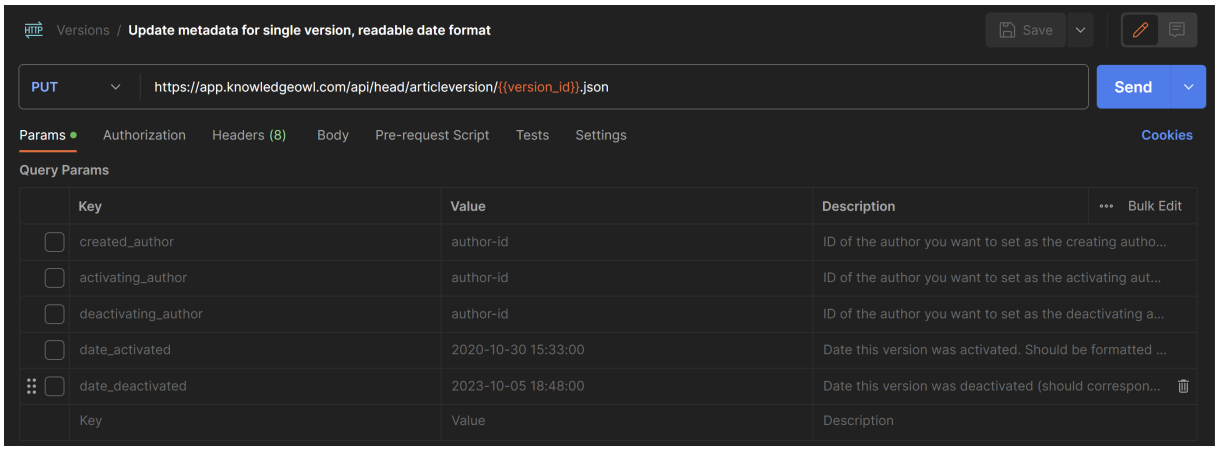
- **Update metadata for single version, readable date format**: This one is easier for beginners to use.
- **Update metadata for single version, UNIX date format**: This one is easier if you want to use a UNIX timestamp. If you're unfamiliar with UNIX timestamps, we recommend using a Unix timestamp converter like https://www.unixtimestamp.com to get the correct timestamp format.

Below, we walk through each of these in more detail.

Update metadata for single version, readable date format

To use this call to update a version's metadata:

1. In Postman, click to open the call.
2. This should open the call to the **Params** tab. If for some reason that tab doesn't open, click it.
3. You'll see something like this (though probably not in dark mode!):



4. In the **Query Params** table, check the boxes next to the fields you want to update.
5. For the fields you've selected, update the **Value**to be the value you want to set the version to have.

a. For any of the author fields: Enter the author's ID. To get an author's ID:

   i. In KnowledgeOwl, go to Your Account > Authors.

   ii. Click to open the details of the author you want to add.

   iii. Copy the portion of the url that comes after /aid/. This is the author's ID.

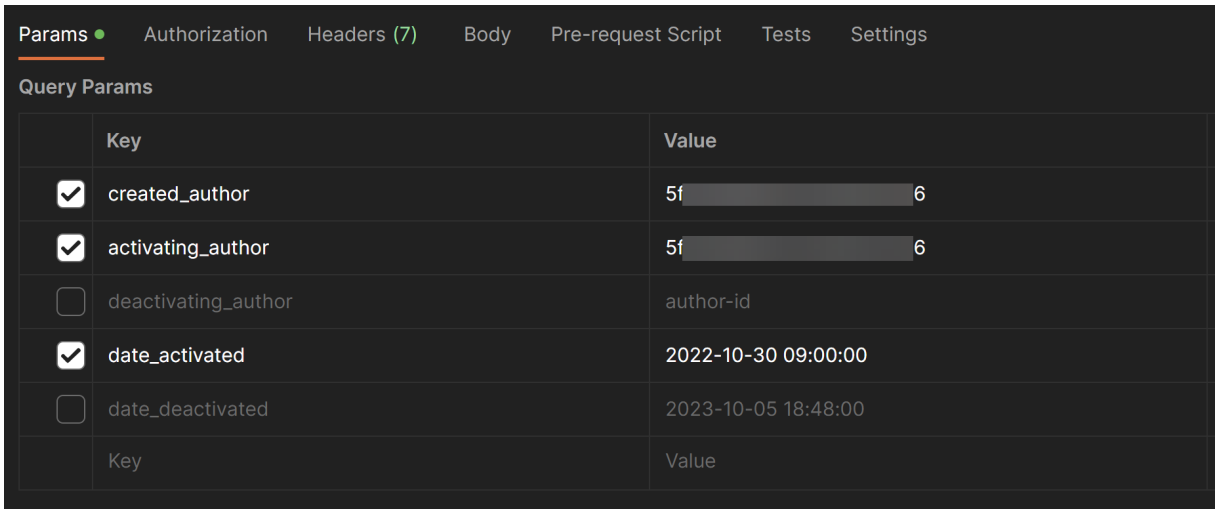
   iv. Paste that into the **Value** in Postman for whichever author field this author should be assigned to.

b. For any of the date fields: Enter the date. We've prepopulated some sample date formats as examples. They should be formatted as *yyyy-mm-dd hh:mm:ss*.

   i. Use Greenwich Mean Time, so you may need to do some time zone conversion (don't worry, you can rerun this call with an edited date if you get it wrong!)

   ii. So if we wanted to update something to be 21 August 2023 at 09:00:00am Eastern, that's 2pm in GMT time. We'd use this value:
   2023-08-21 14:00:00.

6. So, for example, here we're adding a created_author and activating_author, as well as a date_activated:



7. Once you've finished updating values for the checkboxes you selected, click the **Send** button. This will send the PUT call using the data you specified.

8. The window at the bottom will update to show you the new data for the version (it basically returns a GET call for that version after the updates go through), so you can verify if the data you entered was correct.

9. If you **Save** changes, it will save the parameters you've checked as well as the values you entered. If you close the call and discard changes, it will go back to the original unchecked/fake values setup when you first got the collection. The choice is yours!

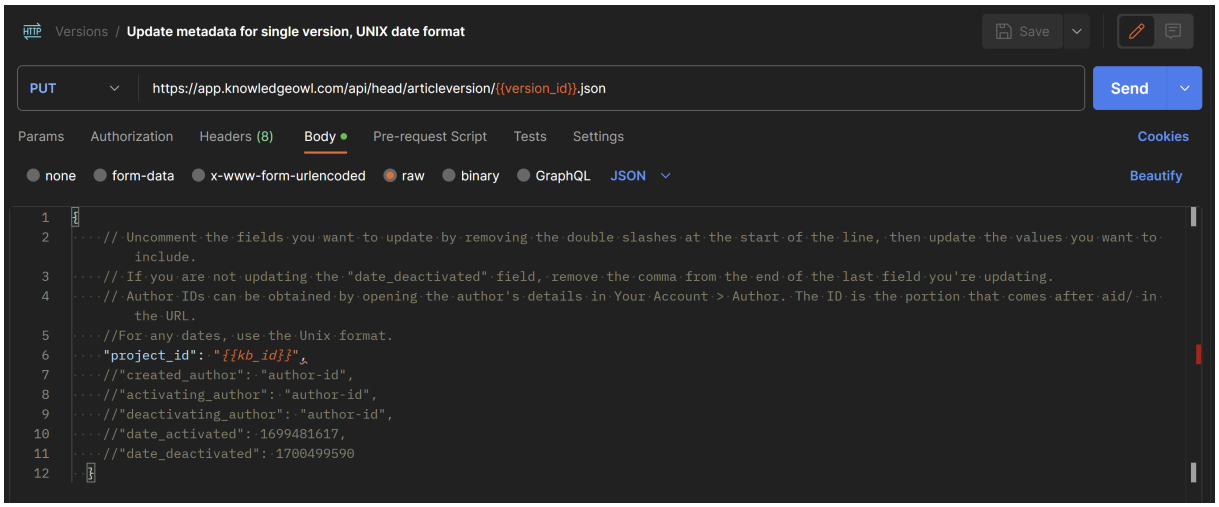
Update metadata for single version, UNIX date format

To use this call to update a version's metadata:

1. In Postman, click to open the call.

2. This should open the call to the **Params** tab. For this call, we don't want **Params**. Click to open the **Body** tab instead.

3. You'll see something like this (though probably not in dark mode!):



4. This call functions very similarly to the previous one, except each parameter is in a commented-out line with a comma after it. To update these parameters:

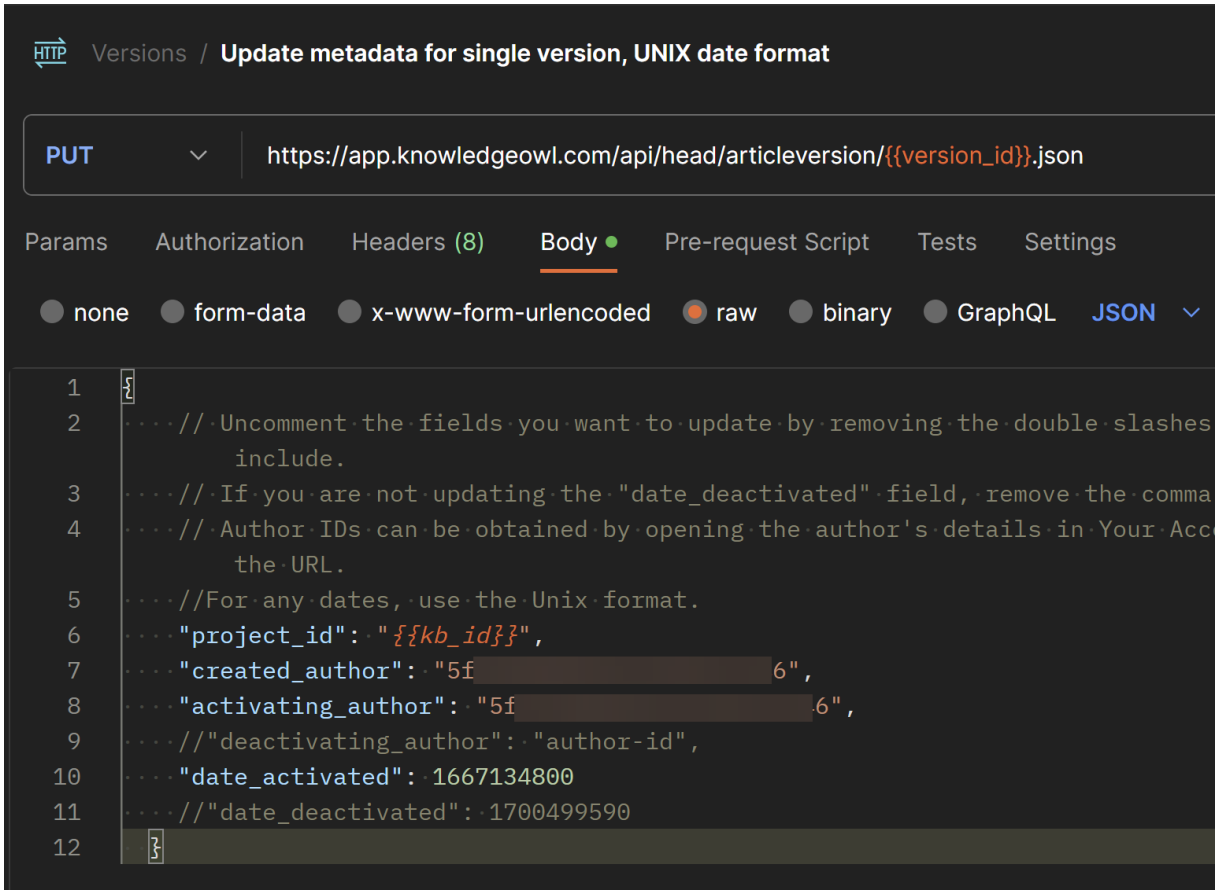
    a. Remove the "//" before the fields you want to update

    b. For authors, add the author ID between the "", so "created_author": "author-id", becomes "created_author": "1234567abcd" if that's my author's ID.

    c. For dates, use a Unix timestamp. we recommend using a Unix timestamp converter like https://www.unixtimestamp.com to get the correct timestamp format. This won't require any time conversion. Copy the Unix timestamp exactly as it appears in the converter and override the default values we've put in. So if we wanted to use November 21, 2022, at 09:00:00 GMT time as our "date_activated", that would be "date_activated": 1669039200,

5. Once you've finished updating uncommenting/commenting out the parameters you want to pass and updating the values for them, be sure that your last uncommented/active parameter does not have a comma after it. (We removed the comma from after "date_deactivated" so you can see how that looks.) JSON lists need to not end with a comma. 😉 Postman will put a little red squiggle under it if the comma needs to be removed.

6. So, for example, here we're updating the created_author, activating_author, and the date_activated to use the same settings we used in the previous call's example:



7. **Once you're done with that, click the Send button. This will send the PUT call using the data you specified.**
8. **The window at the bottom will update to show you the new data for the version (it basically returns a GET call for that version after the updates go through), so you can verify if the data you entered was correct.**
9. **If you Save changes, it will save the parameters you've uncommented as well as the values you entered. If you close the call and discard changes, it will go back to the original commented/fake values setup when you first got the collection. The choice is yours!**

Create a list of articles from a specific category

Last Modified on 05/29/2024 5:27 pm EDT

This example utilizes the API calls in snippets functionality to securely make calls to the API from within your live knowledge base without exposing your API key to readers. For information on how to add snippets to your KB, you can refer to our snippet documentation.

In our example code we will be using a standard jQuery GET request to hit the KnowledgeOwl API. Unlike a standard API call, however, we will be using a "**ko_api**" merge code in place of where you would normally use a URL. This merge code will convert the given parameters within it server side and render a secure, obfuscated, single-use URL client side.

Snippet Variables

By using API snippet merge code variables, this snippet can be placed within different knowledge bases or different sections of a knowledge base and the code will work without the need to modify it. Below are the variables that are being used in this example:

- `%cur_kb_id%` : replaced with the knowledge base ID the snippet is currently being used in
- `%cur_cat_id%` : replaced with either the ID of the current category the snippet is used in, or if used within an article it will be replaced with the category ID that the article belongs to. So if we were using this variable here, it would return the ID for the Cookbook: code samples category.
- `%cur_top_cat_id%` : replaced with the category ID of the top-most (root) category the snippet is being used in. So if we were using this variable here, it would return the ID for the API and webhooks category.

You may have a use case where you want to always use a specific category ID regardless of where the snippet is being used. In that case, you can hard code a category ID in place of the variable.

Other Parameters Used in the Example

In the below example, we are using some additional parameters to further filter out the returned results and only return the information that we want. The full syntax for these parameters can be found in our API documentation but here's a summarized list:

- `"status": {"$in": ["published", "review"]}` : This will filter the results to only include articles that are "published" or in "needs review"
- `"_fields": ["name","url_hash","date_new"]` : This specifies what field data that we want returned for the articles. Limiting the amount of data returned in this way will make the API call more efficient and faster.
- `"limit": 5` : This specifies that we only want the first 5 articles that match our filter returned. Higher limits will be slower and less efficient so only pull back what you need.
- `"sort": {"date_new": 1}` : This specifies that we want the results sorted by the date_new field. The "**1**" specifies **ascending**, whereas a "**-1**" would specify **descending**.

Due to the nature of how the ko_api snippet merge code is replaced server side, you cannot use client side variables to populate values inside of the merge code string.

Snippet API Code

```
<script>
 $(function() {
  // Get list of published articles that belong to the current category sorted by date_new
  $.get('[ko_api(article|{"project_id": "%cur_kb_id%", "status": {"$in": ["published", "review"]}, "category": "%cur_cat_i
  function(apiData) {
      //do something with the returned data
      console.log(apiData);
  }).fail(function(error) {
   //uh oh something went wrong. Alert the end-user or otherwise handle the error
  });

  // Get list of published articles that belong to the root category sorted by date_new
  $.get('[ko_api(article|{"project_id": "%cur_kb_id%", "status": {"$in": ["published", "review"]}, "category": "%cur_top_c
  function(apiData) {
      //do something with the returned data
      console.log(apiData);
  }).fail(function(error) {
   //uh oh something went wrong. Alert the end-user or otherwise handle the error
  });
 });
</script>
```

Webhooks overview and creation

Last Modified on 05/29/2024 5:28 pm EDT

Usage overview

Webhooks allow you to proactively subscribe to events that occur in your KnowledgeOwl account. When an event occurs that you have subscribed to, we will POST a message to the endpoint of your specification containing information about the event.

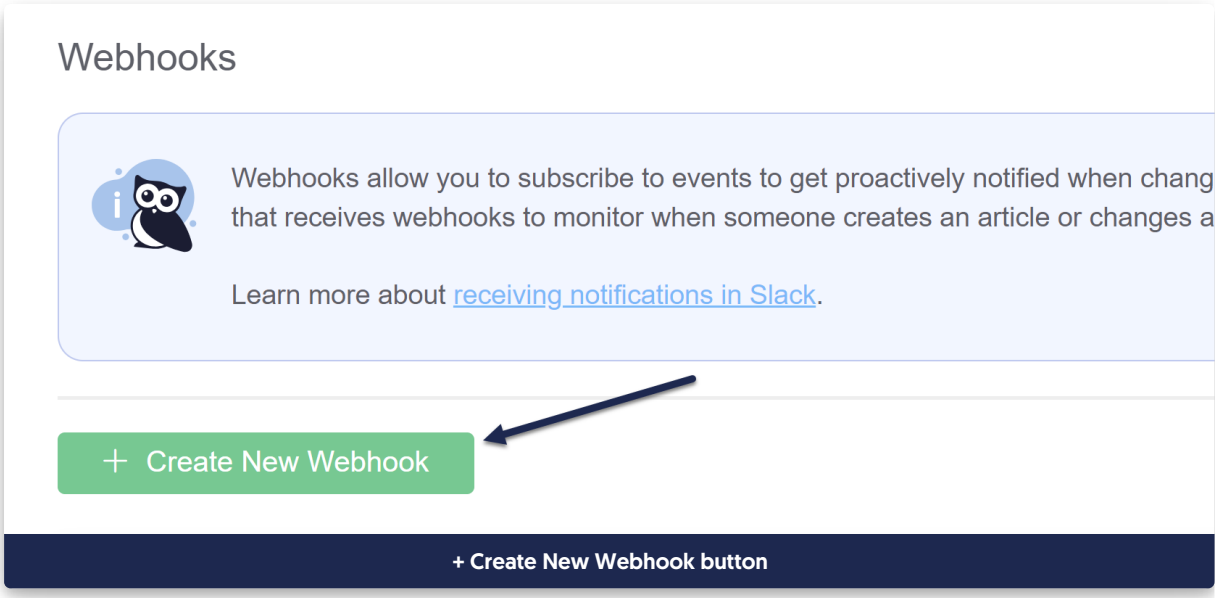
Currently we offer 2 types of POST payloads, one formatted specifically for the application Slack, and the other containing KnowledgeOwl API object data.

Create webhooks

You must have Full Admin access to create webhooks in your knowledge base.

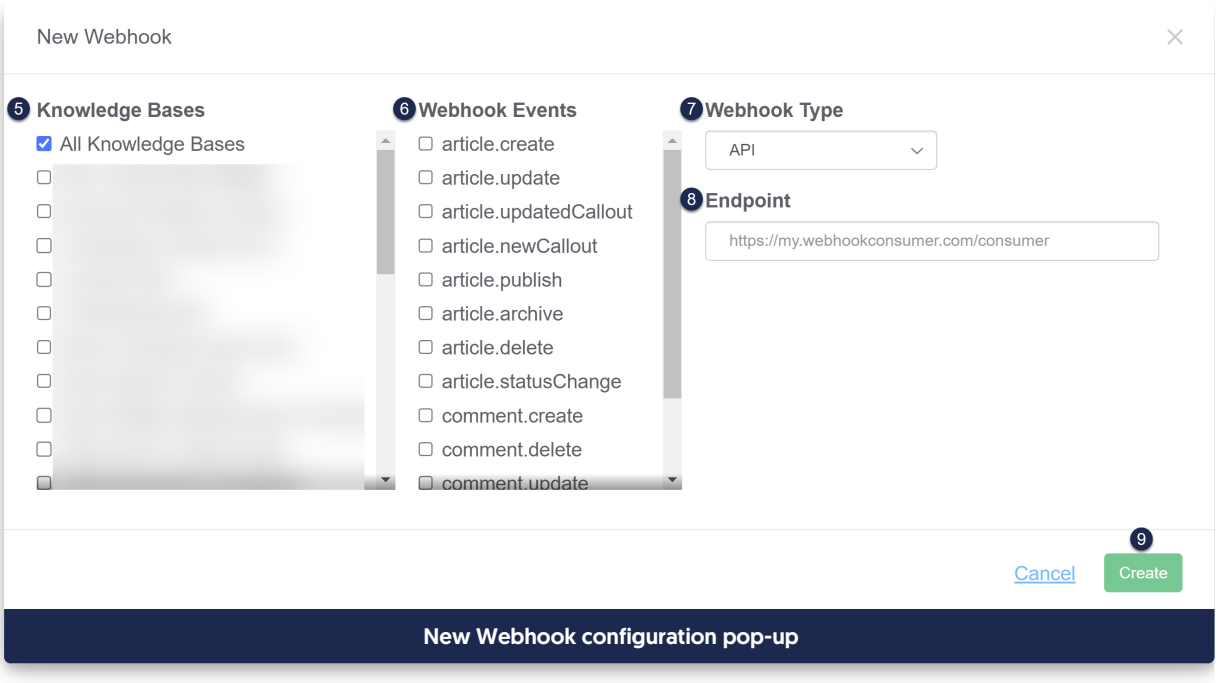
To create webhooks in your knowledge base:

1. Click on your **profile icon/name** in the upper right.
2. Select **Webhooks** from the dropdown.
3. Select the **+ Create New Webhook** button to begin creating a new webhook.



+ Create New Webhook button

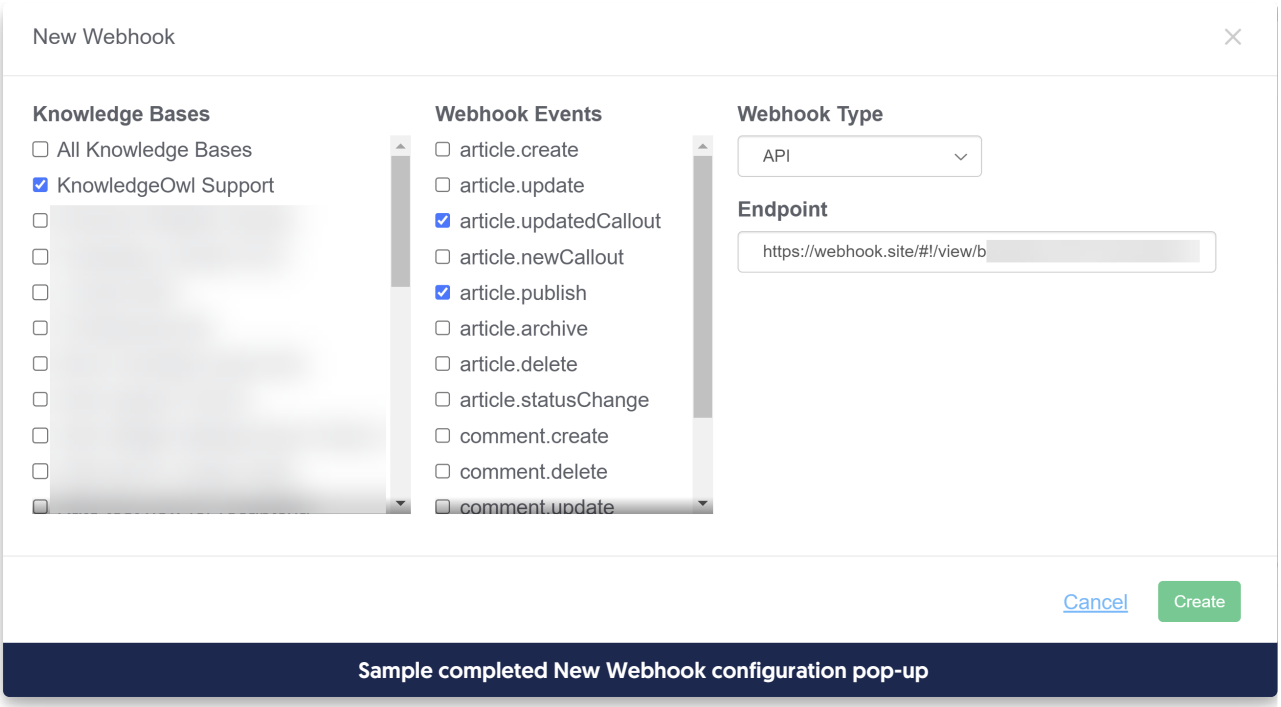
4. This will open a New Webhook configuration pop-up:



New Webhook configuration pop-up

5. The **Knowledge Bases** section allows you to select which knowledge bases you'd like this webhook to fire for. All Knowledge Bases is selected by default, but you can check individual knowledge bases to only enable it for specific knowledge bases.
6. Select one or more **Webhook Events.** The events you select are what will trigger the webhook. See Available webhook events for more details.
7. Select the **Webhook Type**:
    - **Slack** will send the webhook as a Slack message. See Using Webhooks with Slack.
    - **API** will send it to any API endpoint of your choice.
8. Add an appropriate API **Endpoint** to send the webhook to.
9. Click **Create**.

Here's an example of an API webhook configured to fire on the KnowledgeOwl Support knowledge base when an article is published or gets the Updated callout added to it:



Sample completed New Webhook configuration pop-up

Once you create the webhook, if you've selected a single knowledge base, you can also restrict the webhook to fire on a single category.

Available webhook events

Last Modified on 08/29/2024 10:54 am EDT

Here are the webhook events KnowledgeOwl can fire on:

Article Events

- **article.create** - fires once per article, when an article is created
- **article.update** - fires each time an article is saved with changes
- **article.updatedCallout** - fires each time an article is saved with the Updated callout
    - Note: This webhook will only fire if the article previously had a No Status callout.
- **article.newCallout** - fires each time an article is saved with the New callout
    - Note: This webhook will only fire if the article previously had a No Status callout.
- **article.publish** - fires when an article is published
- **article.archive** - fires when an article is saved with an Archived status
- **article.delete** - fires when an article is saved with a Deleted status
- **article.statusChange** - fires any time an article is saved with a publishing status change

Comment Events

- **comment.create** - fires once per comment, when a comment is created
- **comment.delete** - fires when a comment is deleted
- **comment.update** - fires when a comment is updated
- **comment.statusChange** - fires any time a comment's status changes

Contact Form Events

- **contactForm.submit** - fires when a contact form submission occurs

Don't see what you need?
If you have an event that you'd like to receive notifications on that's not listed above, contact us to let us know!

Webhook API calls

Last Modified on 05/29/2024 5:28 pm EDT

Webhook API calls

GET LIST

List current webhook subscriptions for your account:

```
curl -u {{API key}}:x https://app.knowledgeowl.com/api/head/webhook.json
```

GET

Pull info for a specific webhook subscription by ID:

```
curl -u {{API key}}:x https://app.knowledgeowl.com/api/head/webhook/{{webhook ID}}.json
```

Example Response

```
{
 "valid": true,
 "data": {
  "id": "12345abcde",
  "type": "webhook",
  "status": "active",
  "output": "default",
  "project_ids": ["all"], //can also be array of Knowledge base IDs
  "event": ["article.create","article.update"],
  "endpoint":"https:\/\/my.webhookconsumer.com\/webhook-receive",
  "token": "98766abadada",
  "date_created": "06\/16\/2017 3:16 pm EDT",
  "date_modified": "06\/16\/2017 3:16 pm EDT",
  "date_deleted": null
 }
}
```

POST

Create a new webhook subscription:

Before you attempt to create a new webhook, make sure you have an endpoint that is ready to receive information and will return an HTTP status code of 200.

During the subscription creation, a test call will be made to your endpoint. If the endpoint you specify does not return an HTTP status code of 200, your webhook subscription will not be created.

JSON object sent during test call to provided endpoint when the output is set to "default":

```
{"type":"ping","data":{"object":{"webhook":"create"}}}
```

Single event:

```
curl -u {{API key}}:x -H "Content-Type: application/json" -X POST -d
'{"event": "article.delete", "endpoint": "https://hooks.slack.com/services/abcdefe123/abcd1234", "output": "slack"}'
https://app.knowledgeowl.com/api/head/webhook.json
```

Multiple events:

```
curl -u {{API key}}:x -H "Content-Type: application/json" -X POST -d
'{"event": ["article.delete", "article.create"], "endpoint": "https://my.webhookconsumer.com/webhook-receive"}'
https://app.knowledgeowl.com/api/head/webhook.json
```

PUT

Update a webhook subscription:

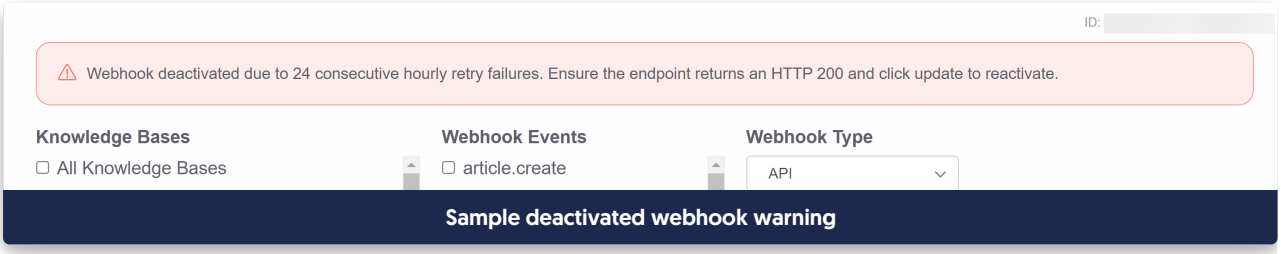
```
curl -u {{API key}}:x -H "Content-Type: application/json" -X PUT -d https://app.knowledgeowl.com/api/webhook.json"
'{"event": "article.delete", "endpoint": "https://my.webhookconsumer.com/webhook-receive-new"}'
https://app.knowledgeowl.com/api/head/webhook/{{webhook ID}}.json
```

Reactivating a webhook

Last Modified on 05/29/2024 5:27 pm EDT

If you've been using a webhook and the endpoint you set up stops accepting our webhooks sends, we automatically deactivate that webhook after 24 hours of consecutive failed retries.

If we do deactivate a webhook, you'll see a warning when viewing the webhook:



Sample deactivated webhook warning

If you get a report that a webhook-based integration isn't working, head to **Your Account > Webhooks** and see if the webhook in question has this warning.

Reactivate a deactivated webhook

To reactivate a deactivated webhook:

1. Fix whatever caused the sends to fail for 24 consecutive hours in the first place. Sometimes that means updating the endpoint KnowledgeOwl has for the webhook. Sometimes it means fixing the endpoint that's receiving them.
2. Go to **Your Account > Webhooks**.
3. If you need to update the endpoint of the webhook settings, make those changes.
4. Click the **Update** button for the deactivated webhook. This should trigger reactivation and whatever webhook events that trigger this webhook should begin triggering the webhook. Usually after reactivation you should see an initial ping go through to the webhook.

An overview of the CAPRA self-assessment in KnowledgeOwl

Last Modified on 01/27/2021 2:48 pm EST

When you use KnowledgeOwl for your CAPRA accreditation self-assessment, here's what the process looks like:

- You let us know that you'd like a copy of the latest CAPRA template.
- Our support team takes a copy of that template and adds it as a new knowledge base in your KnowledgeOwl account.
    - This gives you a full knowledge base with all the chapters and standards of the current CAPRA accreditation standards. All individual standards will be marked with a "Needs Review" status when you get the copy.
- You'll edit the standards in this knowledge base to add narrative, evidence/documentation of compliance, and to indicate whether, by your self-assessment, the standard is met or unmet. We've given you two sample standards to use as a model.
- As you "finalize" standards, you'll change them to a Published status. You can track your progress in a few different ways.
- Review our final review checklist.
- Finally, you'll copy the narrative and links to documents from your CAPRA knowledge base into the NRPA portal. If for some reason not all links will fit in the Narrative portion for the standard, add the link to the standard's URL in your knowledge base as an Additional Documents Link for the chapter in the Portal.

Optional steps in the process:

- At any time, you can update the look and feel of your CAPRA knowledge base to include your logo, fonts, color palette, etc.
- At any time, you can click the **View KB** link in the top navigation to view the knowledge base as your external reviewers will see it. If you're editing an individual standard, you can click the **View Article** link to see the standard as your reviewers will see it.
- If needed, review the security settings in your CAPRA knowledge base in case you need to give members of your organization or CAPRA self-assessment reviewers direct access to review your materials.

Once the KnowledgeOwl team provides you with the copy of our template, the content is yours. If NRPA updates the standards between when we provide you the copy of our template and when your accreditation review begins, it will be your responsibility to update the standards directly in your knowledge base. We'll give you instructions on how to make these updates.

We're also experimenting with an email list in which we'd send you a list of the standards that need updating and what those updates are. Let us know if you'd like to be included in that email list!

You are also welcome to request a "fresh" copy of our latest CAPRA accreditation template at any time. You'd need to manually update it to reflect any changes you've made to your existing copy, but sometimes this is faster if the copy you have is quite outdated.

The basics: app vs. knowledge base

Last Modified on 05/29/2024 5:28 pm EDT

There are basically two "sides" to KnowledgeOwl:

- **The KnowledgeOwl app** (app.knowledgeowl.com): where you log in to create and edit content, what you might consider the "back end". The people who access the app are considered authors, and are factored into your billing.
- **Your knowledge base itself** (example: my-knowledgebase.knowledgeowl.com): the view-only version of your knowledge base that you can share with reviewers, what you might consider the "front end". You can view this at any time by clicking the **View KB** button in the top navigation of the app, and you can change the subdomain (or add your own private domain) in **Settings > Basic**. People who access the knowledge base are considered readers; readers cost you nothing and you can have unlimited readers.

Only standards that are marked with a "Needs Review" or a "Published" status will be visible in the knowledge base itself; you can "hide" standards from that knowledge base by using Draft, Ready to Publish, Rejected Draft, or Deleted status.



If you are including links to your materials in the NRPA Portal, don't give them the app.knowledgeowl.com URLs; give them your knowledge base URLs. To send links to specific standards, open the standard within the app as if you're going to edit it, and click the **View Article** link near the top center of the page.

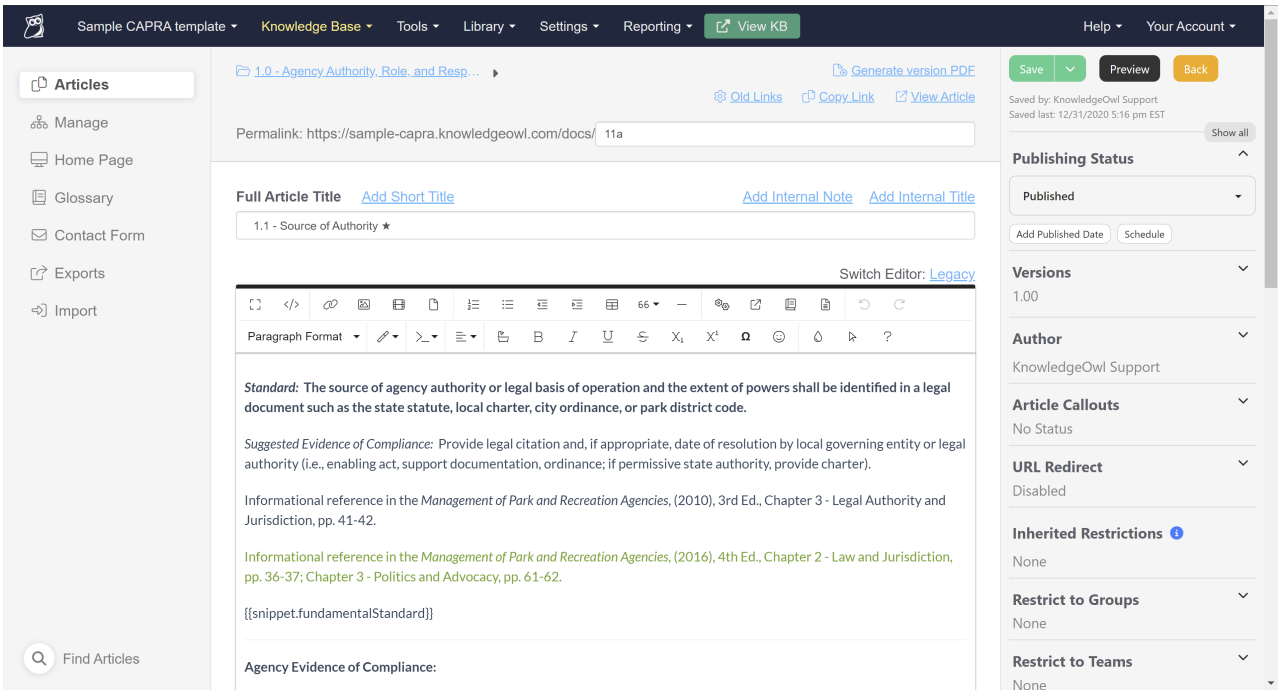
The basics: editing standards

Last Modified on 05/29/2024 5:28 pm EDT

You can access standards to edit them in three ways:

- Navigate in the **Articles** hierarchy and click on the standard you want to edit
- Search for the standard using the **Find Articles** search in the lower left of most app pages
- Use one of the filters combined with search in the **Manage** interface

Either way, once you click on the standard, it will open in an editor screen like this:

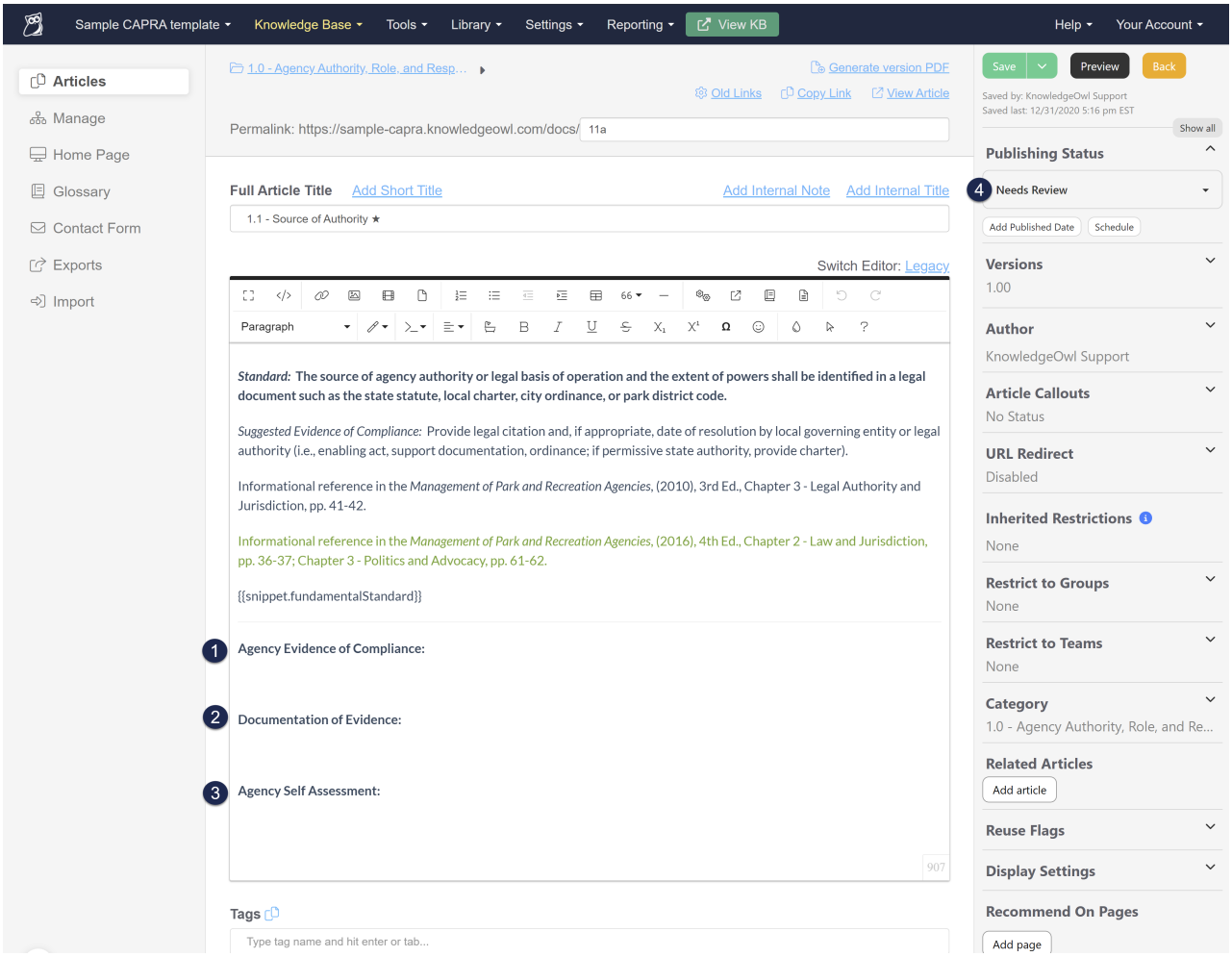


As a general rule of thumb, you won't want to touch anything in the editor above the **Agency Evidence of Compliance** section. (The one exception to this is if you're updating the standard itself because NRPA released new standards.) But for all other edits, ignore the Permalink, the Full Article Title, and within the editor itself, skip the Standard, Suggested Evidence of Compliance, and the Informational reference(s).

Some standards will include that snippet.fundamentalStandard section--this snippet code is added to standards that are considered fundamental/required--it just tells the knowledge base to display the standard title in red. You can safely ignore this now, too.

Required sections

You should focus on three sections in the editor body, plus the Publishing Status:



1. **Agency Evidence of Compliance:** Provide evidence of your compliance to this standard. Most often, this includes narrative.
2. **Documentation of Evidence:** Provide links to documentation that supports your evidence of compliance. This can include files you've uploaded to KnowledgeOwl directly (see The basics: adding documents, files, and more), as well as links to pages on your website (see The basics: adding links to other websites or online resources).
3. **Agency Self Assessment:** Here, indicate whether you have assessed that this standard is Met or Unmet.
4. **Publishing Status:** Once you have fully reviewed/updated this standard and you consider it "complete" and ready for review, change the publishing status to Published.

Standard text formatting tips

As of January 2021, the NRPA Portal does not support bulleted or numbered lists in their editor. Copying and pasting these lists into the Portal will just create new paragraphs.

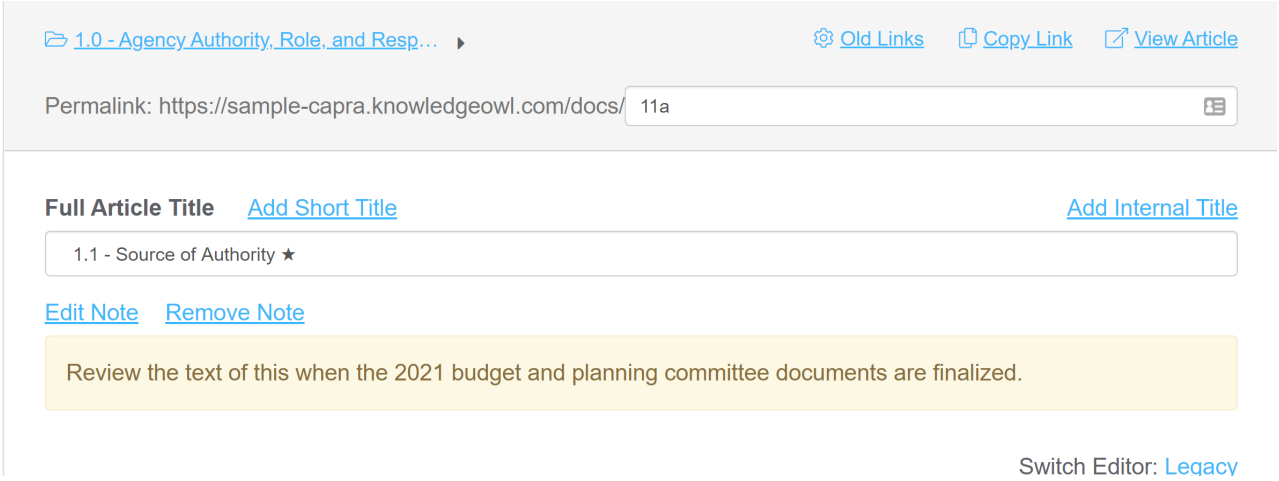
The Portal editor does not properly paste in superscript and subscript text from KnowledgeOwl. You're welcome to still use these format types, but recognize that you may have to do additional formatting on them within the Portal editor.

Optional/helpful sections

There are a couple editor tricks that may be useful in your workflow, so we wanted to point them out!

Internal note

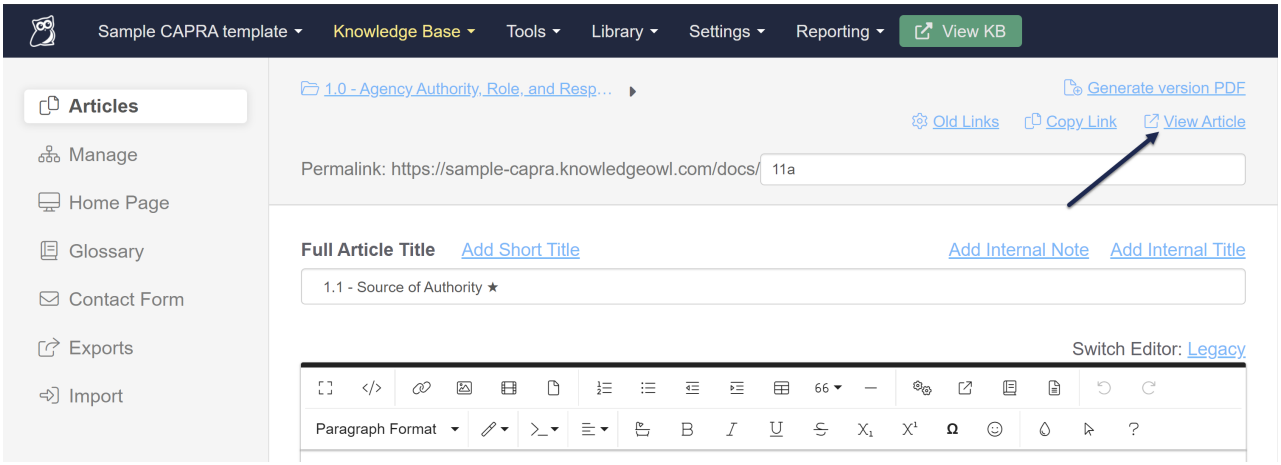
The Internal Note field in KnowledgeOwl gives you a way to add a note that is displayed between the Full Article Title and the editor. This note is only visible to authors within KnowledgeOwl (it is never shown in the knowledge base itself). It can be a great field to use for notes on what still needs to be updated or reviewed in the standard.



See our general Internal note documentation for more information on using this feature.

View Article link

If you're curious how a standard will display, or if you need to grab the URL of a standard to include it in the Additional Documents Link section of a chapter, click the **View Article** link near the top navigation. This basically does the same thing as View KB + navigating to the standard you were looking at. It can be a great time saver for "seeing" how the standard looks or grabbing the URL to paste somewhere else.



Tags

Tags are an optional metadata field available at the bottom of the editor. We've found them useful for CAPRA self-assessments in two ways:

- If you have multiple people working to update standards, and you're using a shared account, create a tag for each person who's working in the app. Add the tag with their name on it to indicate which person is

responsible for a given standard.
- If a standard cannot be completed until certain processes or documents are completed, create a tag for the process or document, and add it to the standards.

With tags in place, you can create custom filters in **Knowledge Base > Manage** to pull a list of standards with each tag, making it easy to divide up the remaining work or update all standards that were waiting on something else at once. See our CAPRA-specific documentation on Using tags to track more detailed progress and general documentation on Creating a custom Manage filter for more information on these workflows!

The basics: adding documents, files, and more

Last Modified on 05/29/2024 5:28 pm EDT

For most standards, you'll need to include documents as part of your documentation/evidence of compliance. File management is one of the places where KnowledgeOwl can save you a lot of time and effort.

With CAPRA accreditation, you're often referencing the same files over and over again in different standards. For these frequently-referenced files, we recommend uploading them all directly to your File Library. (You can go to the top navigation under **Library** > **Files** to do so; see Adding files and images in bulk for more information.)

Then, when you're editing an individual standard, you can use "Insert Image", "Insert Video", or "Upload File" and click the folder icon to "Add from Library". This will create a link to that existing file in the library. See Adding images and files to articles for more information.

You can always add individual PDFs, images, documents, etc., within a standard using the "Insert Image", "Insert Video", and "Upload File" links in the top bar of the editor tools, and upload a new file that way rather than going to the File Library, too.



But we strongly encourage you to train yourself and any other people working on the accreditation to use the Add from Library option first, and to only add a new file when the one you need doesn't already exist in the File Library.

Why do we recommend adding files this way, rather than uploading them fresh to each standard?

Reason #1: Easier file management

When you've used the Add from Library option, each standard that is referencing, say, your 2021 budget document is referencing the **exact same** budget document in the File Library.

This means that if that document changes--maybe to the 2022 budget--you can go into the File Library, update the file stored there, and every standard that referenced that budget document using the Add from Library option will **automatically** be updated to have that 2022 budget document, instead. (It won't update the text of the hyperlink to the file, but it will update the underlying file.) We've seen CAPRA authors keep spreadsheets or notepads with lists of which standards referenced each document, so they could remember where to update the files, and we'd like you to avoid having to do that!

See Editing and updating files for more information on how to update an existing file.

Reason #2: Fewer files

When you upload a new file from scratch, it creates that file as a new file in the File Library--even if the file

identically matches something else already in the File Library.

When you Add from Library, it points the link you're adding to that existing file.

So this is one way to keep your File Library tidy, without conflicting versions of a file. It's much easier to use Add from Library, search "budget", get a search result with one budget document, and know that you're adding the right file, than it is to find 12 budget documents all named identically, added at different times.

The basics: adding links to other websites or online resources

Last Modified on 05/29/2024 5:28 pm EDT

You can also insert hyperlinks to resources that are already available on your public website, etc. See Working with links to other websites for more information on inserting, testing, and editing hyperlinks in your standards.

When you insert hyperlinks this way, be sure you check the box to open the link in a new tab. This will copy and paste into the Portal using the recommended settings.

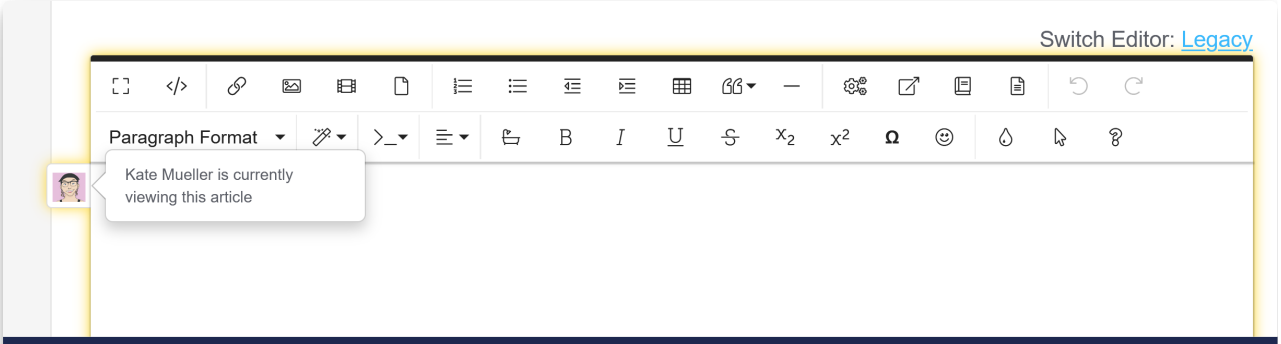
Managing multiple authors making changes

Last Modified on 05/29/2024 5:28 pm EDT

If you have multiple people viewing or editing the same standard at the same time in the app, the editor will warn you by adding an icon to the editor and adding a color outline around it. (If the author has added a photo or icon, you'll see that; otherwise you'll see a generic gray gravatar shape.)

Viewing conflict

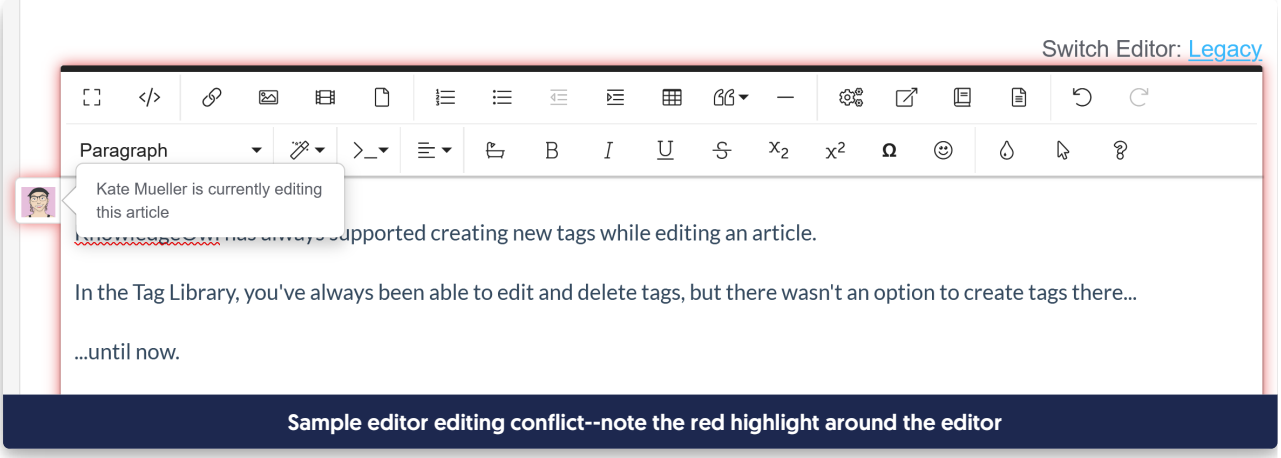
If someone else has the standard open in the editor, but hasn't made any changes, you'll see the icon appear and a yellow outline will appear around the editor. You can hover your mouse over the icon to see the person who's accessing it:



Sample editor viewing conflict--note the yellow highlight around the editor

Editing conflict

If someone else has the standard open in the editor and has started making changes, you'll see the icon appear and a red outline will appear around the editor:



Sample editor editing conflict--note the red highlight around the editor

If one of you tries to save changes that would overwrite the changes the other one has made, you'll get a

warning and can choose whether to keep your changes and overwrite the other person's, or to discard your changes and keep the other person's.

Tracking complete/incomplete standards

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When your CAPRA self-assessment knowledge base was created, all of the standards in it were set to a "Needs Review" publishing status.

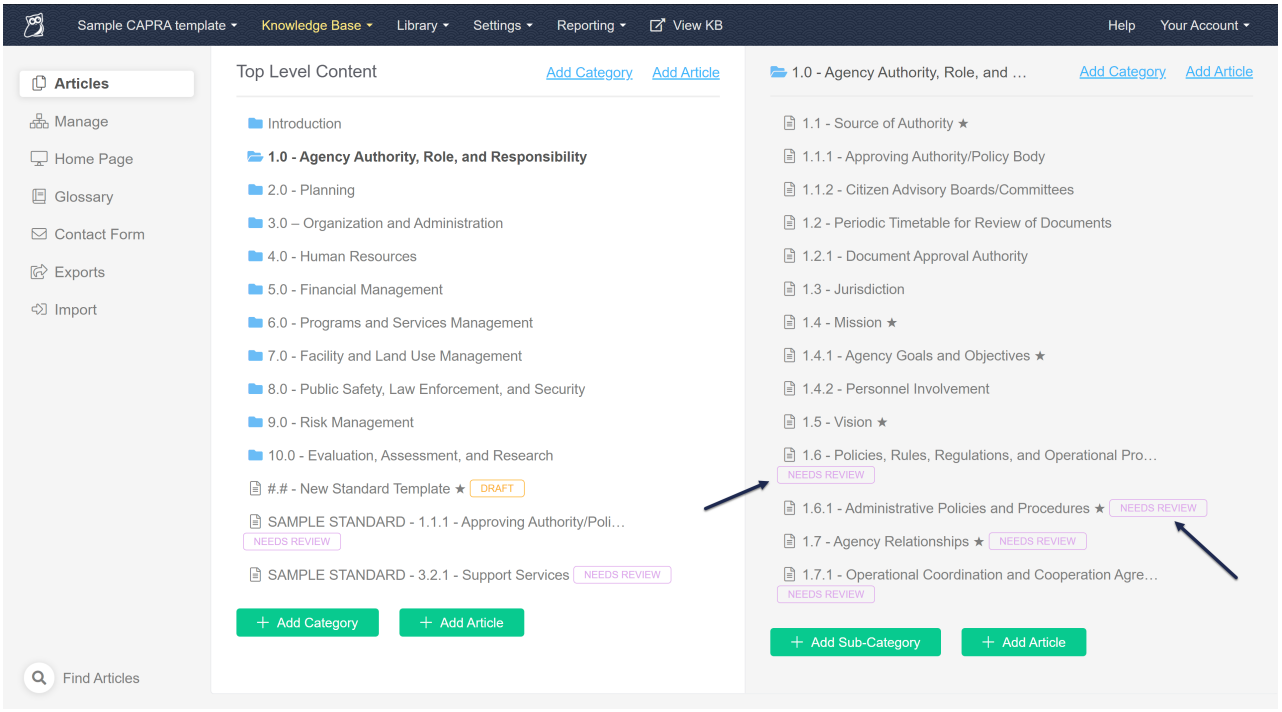
As we've mentioned, we recommend changing the publishing status of a standard to "Published" once you consider it "finished." This will help you keep track of which standards are complete and which still need your review.

You can see the standards that you have remaining in two places: using the article call-outs on the Articles page, and using filters in the Manage page. Let's look at each more closely:

Articles page

On the **Articles** page, any standard with a Needs Review status has a purple Needs Review callout next to the title.

For example, here I can see that most of Chapter 1 is complete, but I still need to finish standards 1.6, 1.6.1, 1.7, and 1.7.1:

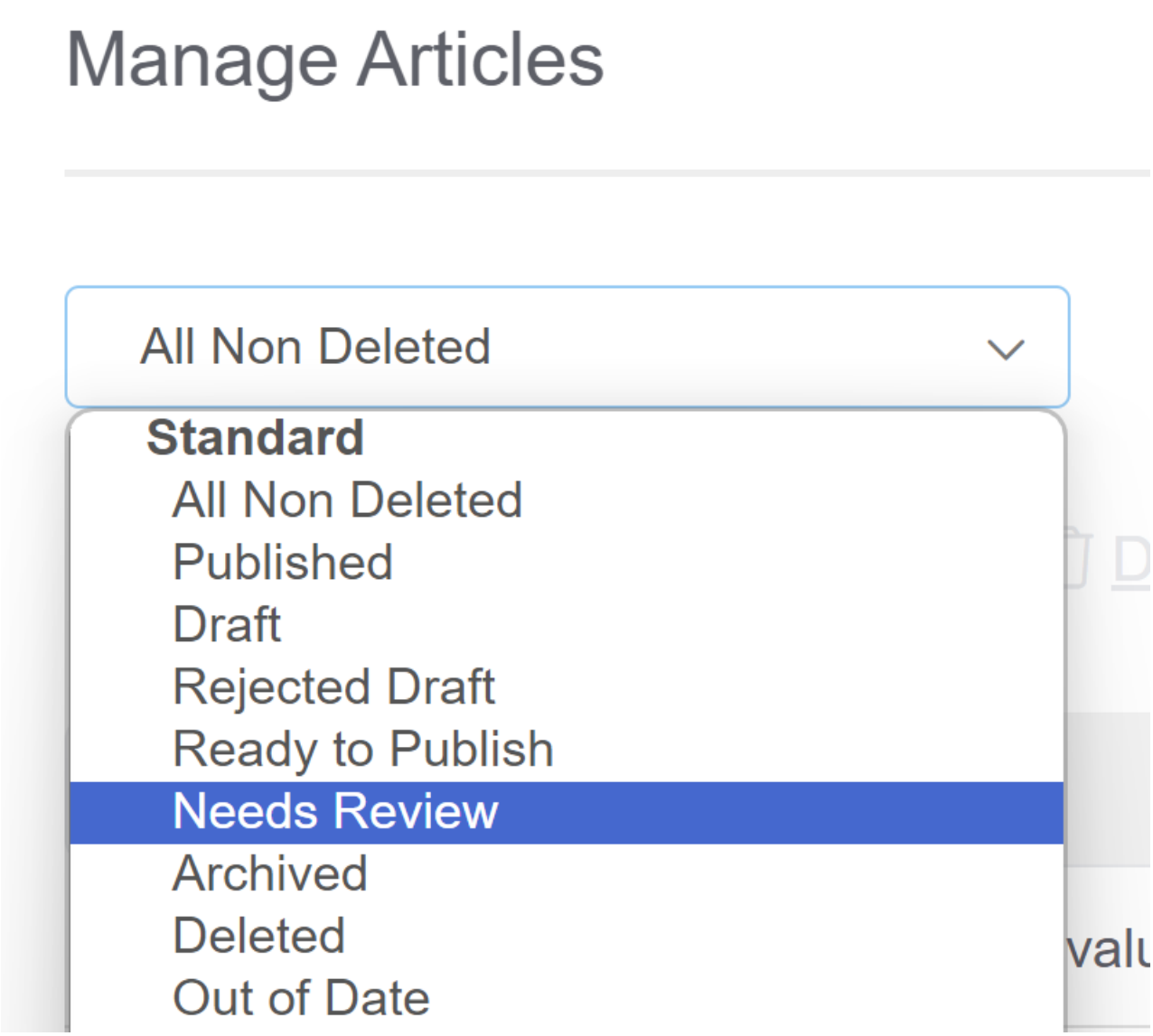


Pros: This can be a great view to get a feel for how complete a certain chapter is.

Cons: This doesn't provide a count or let you see across all chapters at once.

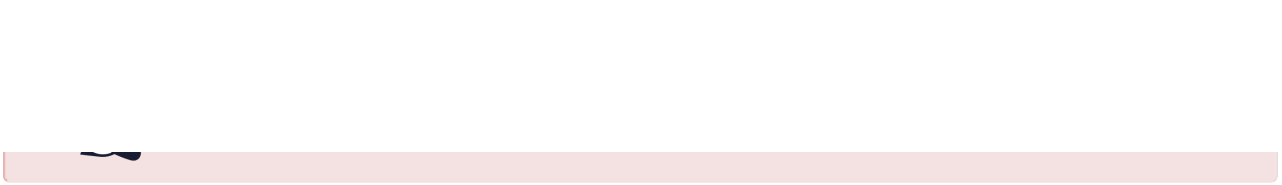
Manage articles page

On the **Knowledge Base > Manage** page, you can use the Needs Review filter to get a complete list of all standards with a Needs Review status:



Pros: This filter looks across all chapters. It will give you a complete count of remaining standards at the bottom of the page. You can also export this list to Excel using the **Export Articles to CSV** option, in case you want to track that information somewhere else.

Cons: There is no way to filter this to a specific chapter, though you can sort by Article Name.



Alternative workflow: Draft rather than Needs Review

Last Modified on 05/29/2024 5:27 pm EDT

When your CAPRA self-assessment knowledge base was created, all of the standards in it were set to a "Needs Review" publishing status. Our standard recommended workflow for our CAPRA customers is to then use the Published status to show when a standard is complete.

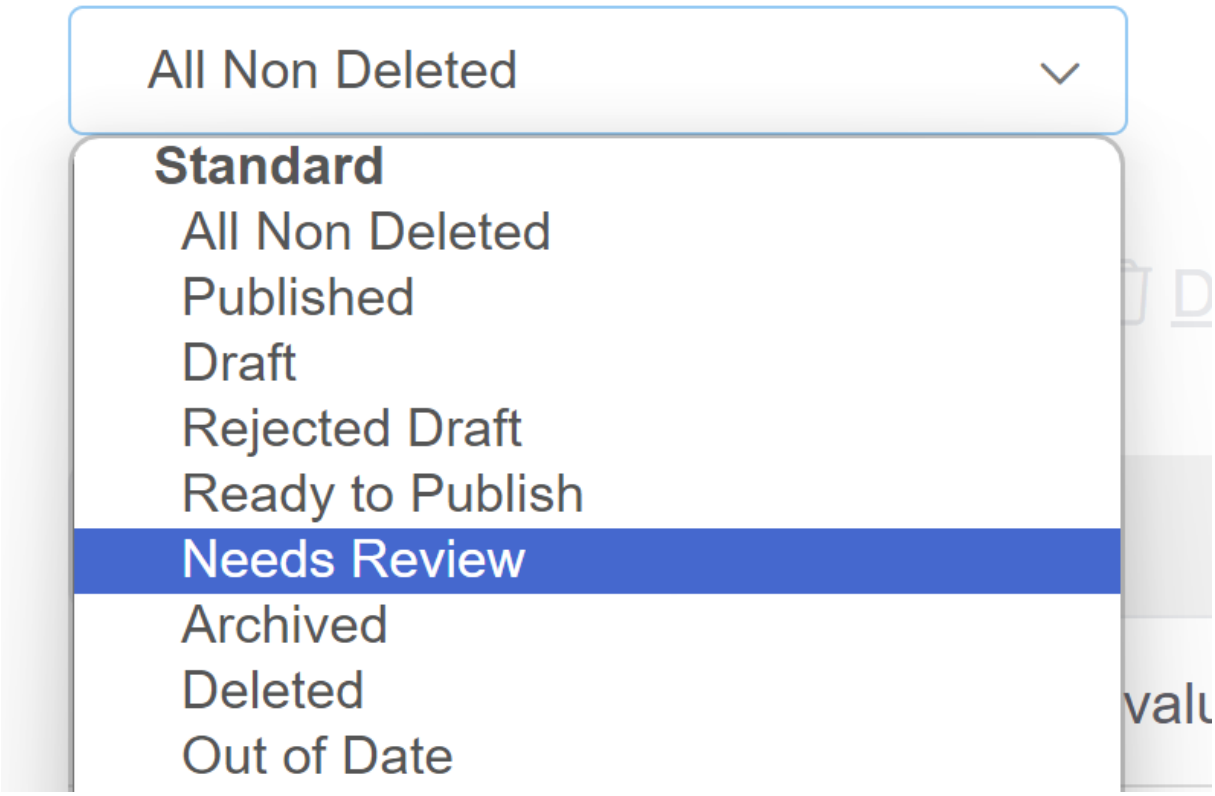
However, the Needs Review status will still show these in-progress standards on your knowledge base (visible when you click the **View KB** link in the top navigation or **View Article** link while editing any standard).

Some of our CAPRA customers prefer to have standards show in the knowledge base only once they are complete.

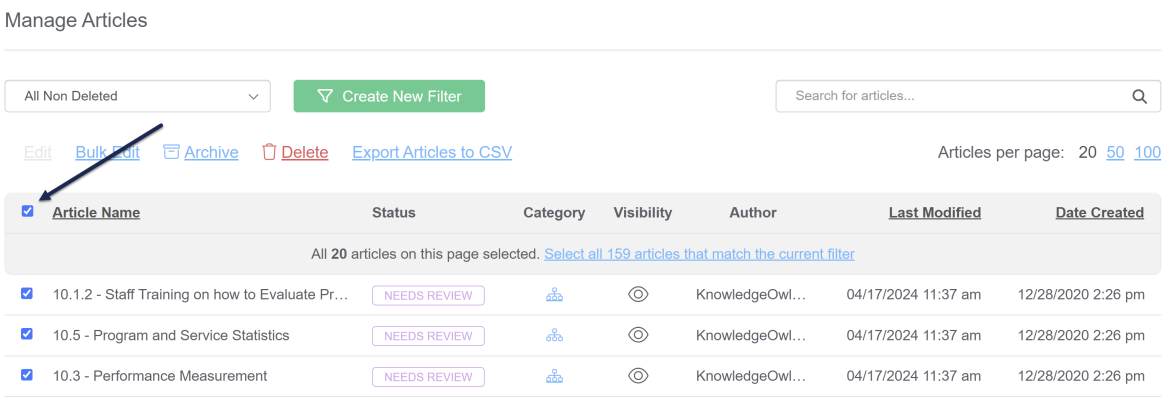
If you'd prefer to adopt this workflow, we recommend changing all standards to a "Draft" publishing status and then Publishing them when they are complete.

You can edit all of your existing standards from Needs Review to Draft status using these steps:

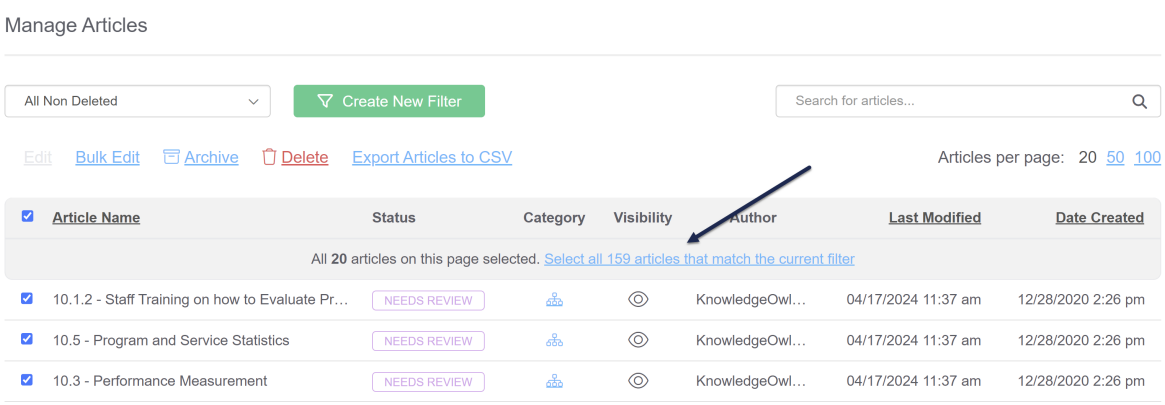
1. Go to **Knowledge Base > Manage**.
2. In the dropdown at the top, select **Needs Review** from the Standard filter options.



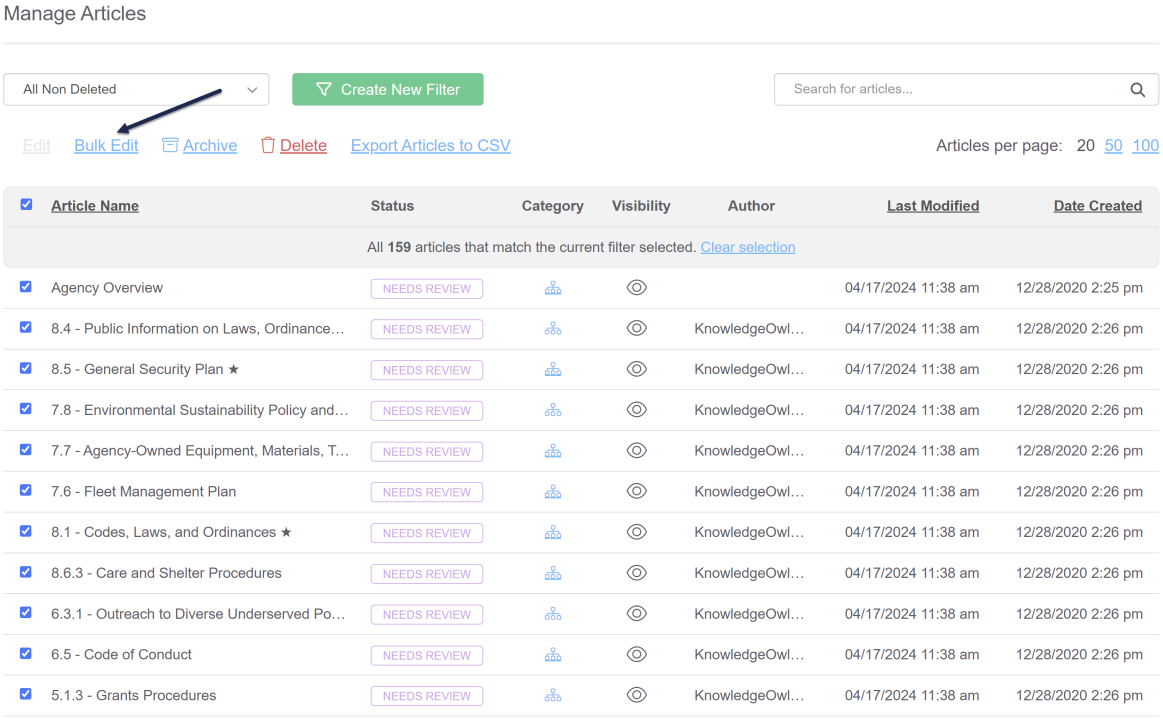
3. **Once the filter loads, click in the box to the left of the Article Name field to select all the standards on the screen:**



4. **You'll see an option to select all articles in filter (this will vary based on the number of standards displayed). Click on the link to select all xxx articles that match the current filter:**

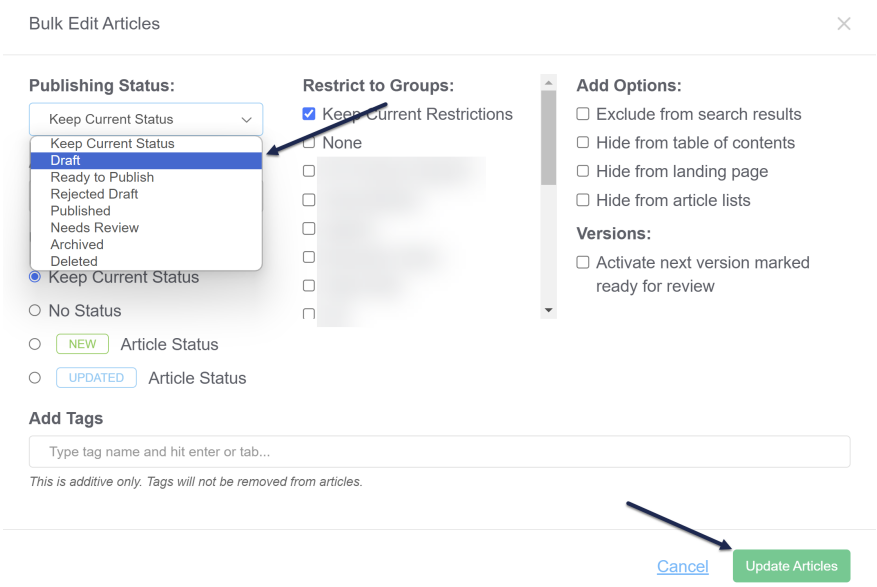


5. **The message will change to confirm you've selected all in filter. Click the Bulk Edit link between the filter dropdown and the Article Name:**

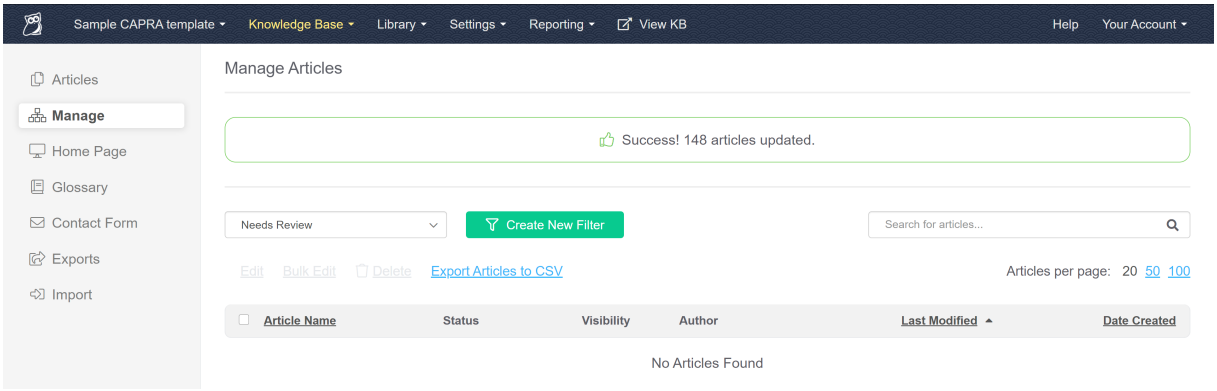


6. **In the Bulk Edit Articles pop-up, under Publishing Status, select Draft.**

7. **Then click the Update Articles button.**



8. **This will set all your Needs Review articles to have a Draft publishing status. The Bulk Edits take a bit of time, so you'll see a progress bar across the top, and a confirmation message once it's complete:**



With these changes made, you can track the standards still needing work using the Manage "Draft" filter, and visually in the Articles page with the Draft callout.

You can also use two other unpublished statuses and their related Manage filters to manage your workflow: Ready to Publish (which can indicate something is ready to be reviewed) and Rejected Draft (which can indicate something failed that final review and still needs work).

Use tags to track more detailed progress

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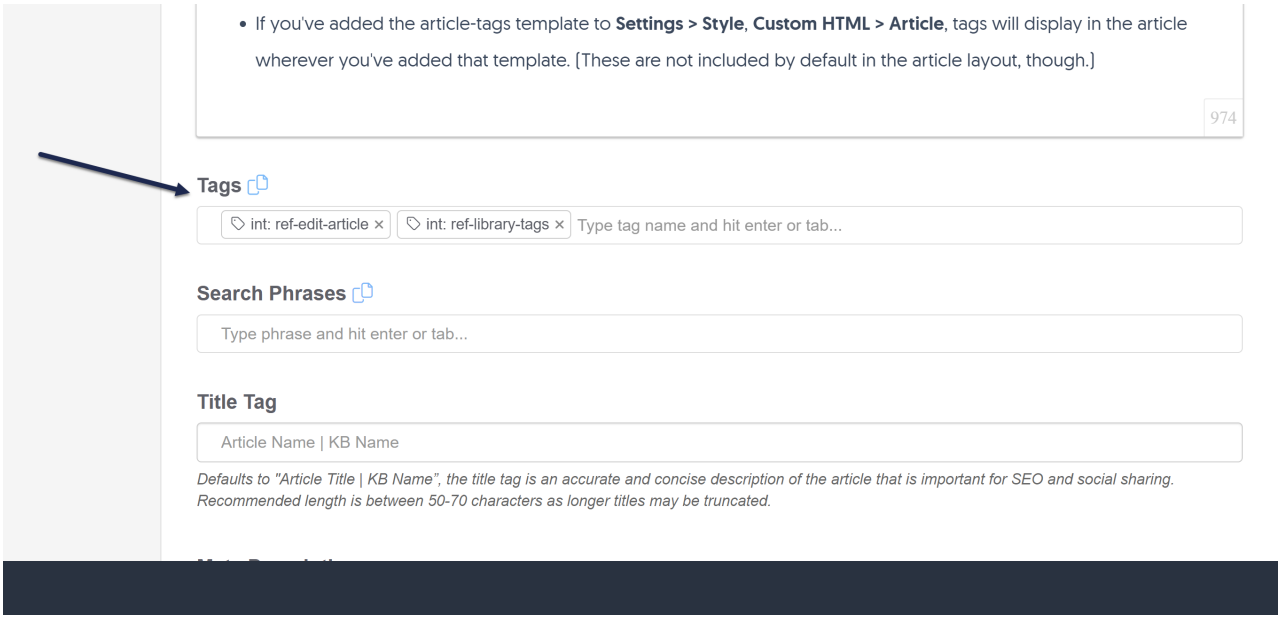
As we mentioned in the Optional/helpful sections of The basics: editing standards, some CAPRA customers also use optional tags to help manage their self-assessment workflow.

A tag is a word or short phrase that "describes" the article. An article may have as many tags as you like. They can be a great way to add organization and navigation to your knowledge base.

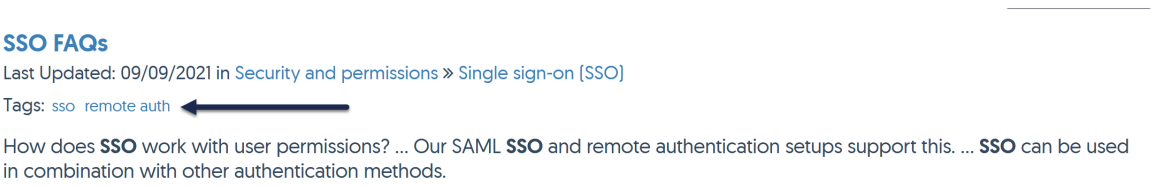
The easiest way to think about tags is to consider them like filters for your content. These filters can be used:

- By your **readers** using a tag search (which begins with ":" followed by the tag name)
- As custom filters in Knowledge Base > Manage: if you're using tags for these kinds of internal filters only, you can mark tags as "hidden" so they won't show up to readers



For readers, tags will display:

- In search results, in a Tags section between the Last Updated and the article blurb



- In the search autocomplete after they've begun a search phrase with a colon (":")



- If you've added the article-tags template to **Settings > Style, Custom HTML > Article**, tags will display in the article wherever you've added that template. (These are not included by default in the article layout, though.)

Tags + CAPRA workflows

For CAPRA customers, the most common ways to use tags are:

- If you're using shared author accounts, create a tag for each collaborator's name. Add that name tag to the standards that you need that person to work on.
- Create tags for documents, policies, or other real-world actions that haven't been completed yet, so you can easily pull a list of standards that need editing once that real-world task is done. (Such as: 2021 Budget, 2021 Audit Results, August Board Meeting, etc.)

Once tags have been added to articles, you can create custom **Knowledge Base > Manage** filters for those tags, so you can quickly generate lists of the articles tagged in certain ways.

See Tags for more information on working with tags, or see Creating a custom Manage filter for steps on how to create a Manage filter to look for specific tags.

Final review checklist

Last Modified on 01/27/2021 2:42 pm EST

Before you submit your Self-Assessment documentation to NRPA, you may want to complete these tasks:

- **Ensure that all standards are set to Published status.**
  Go to **Knowledge Base > Manage** and use the Standard filters there to ensure that no standards are still in a Needs Review status (or other statuses, if you used a different workflow).
- **Final check: review each standard.**
  Most of our CAPRA customers do like to do one final review of all standards to ensure they look good. It is generally easiest to complete this review either working through the knowledge base as a reviewer would, or reviewing the full PDF export of the knowledge base. See Standard PDF export (Full PDF Download) for information on how to generate a full PDF export of your knowledge base.
- **Optional: Regenerate the Standard PDF export, if using.**
  If you're using the Standard PDF export in your table of contents, be sure to regenerate that PDF.
- **Optional: Review the password/security settings of your knowledge base.**
  If you've kept the shared password setup, you'll need to provide the shared password to your reviewers any time you include a link to one of the standards. See How do I give reviewers access to my CAPRA self-assessment? for more information.
- **Optional: Confirm your knowledge base URL.**
  Click the **View KB** link in the top navigation to get the URL. If you'd like to edit the subdomain (the portion before ".knowledgeowl.com"), see instructions in Customizing your self-assessment knowledge base.
- **Optional: Review the branding and title of your knowledge base.**
  See instructions in Customizing your self-assessment knowledge base for changing various elements here.
- **Optional: Review the text of the home page of your knowledge base.**
  See instructions in Customizing your self-assessment knowledge base for changing various elements here.

Moving your self-assessment report into the NRPA Portal

Last Modified on 01/27/2021 2:45 pm EST

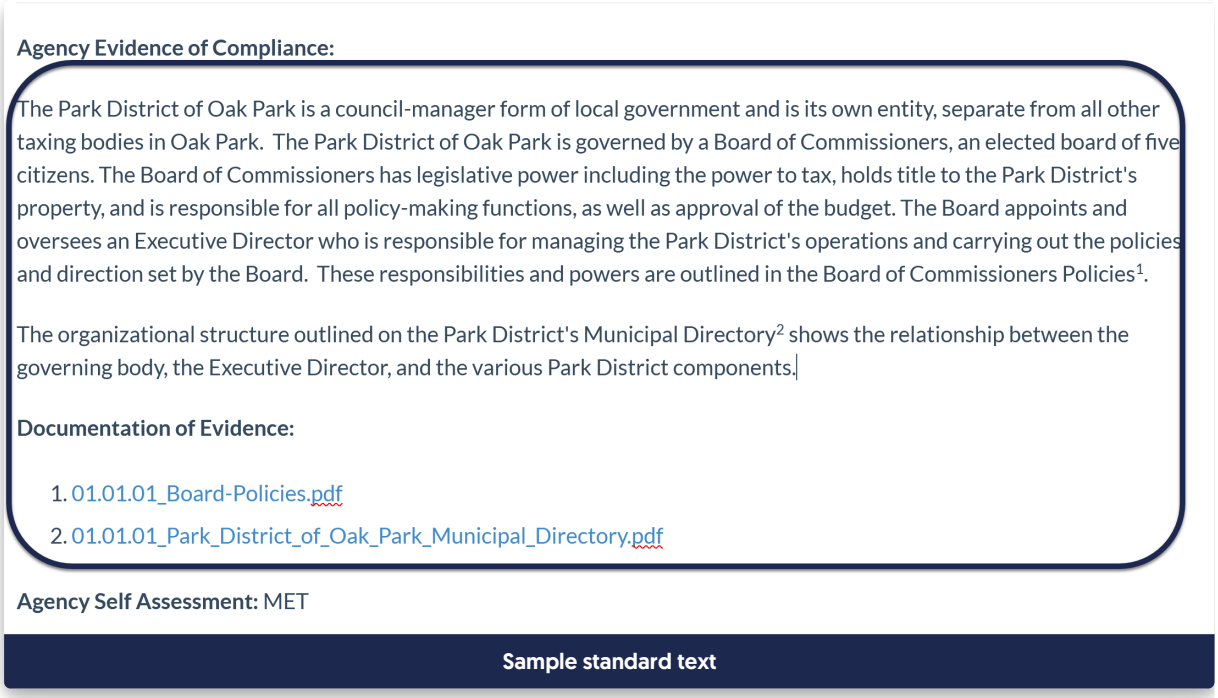
We've written these instructions with guidance from the NRPA; if you have questions on completing the self-assessment or using the Portal generally, we recommend contacting them directly or referencing their documentation on how to use the Portal:

- How to - log into CAPRA Portal.docx (last updated January 2021)
- How To Complete Online SA and upload EOCs.docx (last updated January 2021)

For most standards, you can copy and paste the narrative and hyperlinks you have in KnowledgeOwl into the relevant standard in the NRPA Portal.

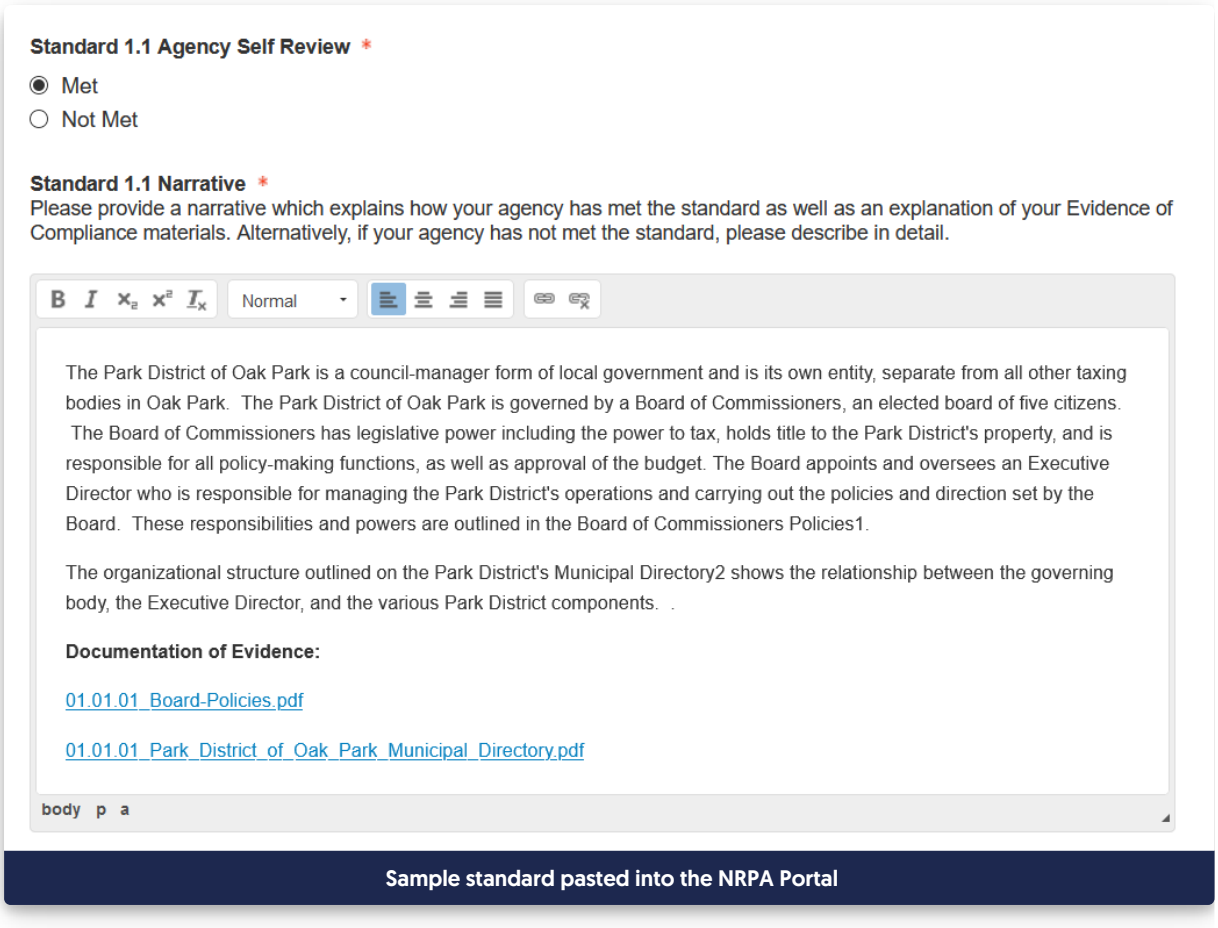
To do so, you'll want to have the NRPA Portal open to your self-assessment, to one of the sections, and KnowledgeOwl opened to the corresponding chapter/section.

1. **In KnowledgeOwl, open the standard as if you're going to edit it.**
2. **Highlight the text below Agency Evidence of Compliance and your entire Documentation of Evidence section.**



3. **Press Ctrl + C or right-click and select copy to copy the text and links you've highlighted.**
4. **In the Portal, click in the editor box for this standard.**
5. **Press Ctrl + V or right-click and select paste to paste the text and links into the Portal.**

Your standard should look something like this in the Portal:



Sample standard pasted into the NRPA Portal

6. You can now save or continue adding the text of additional standards.

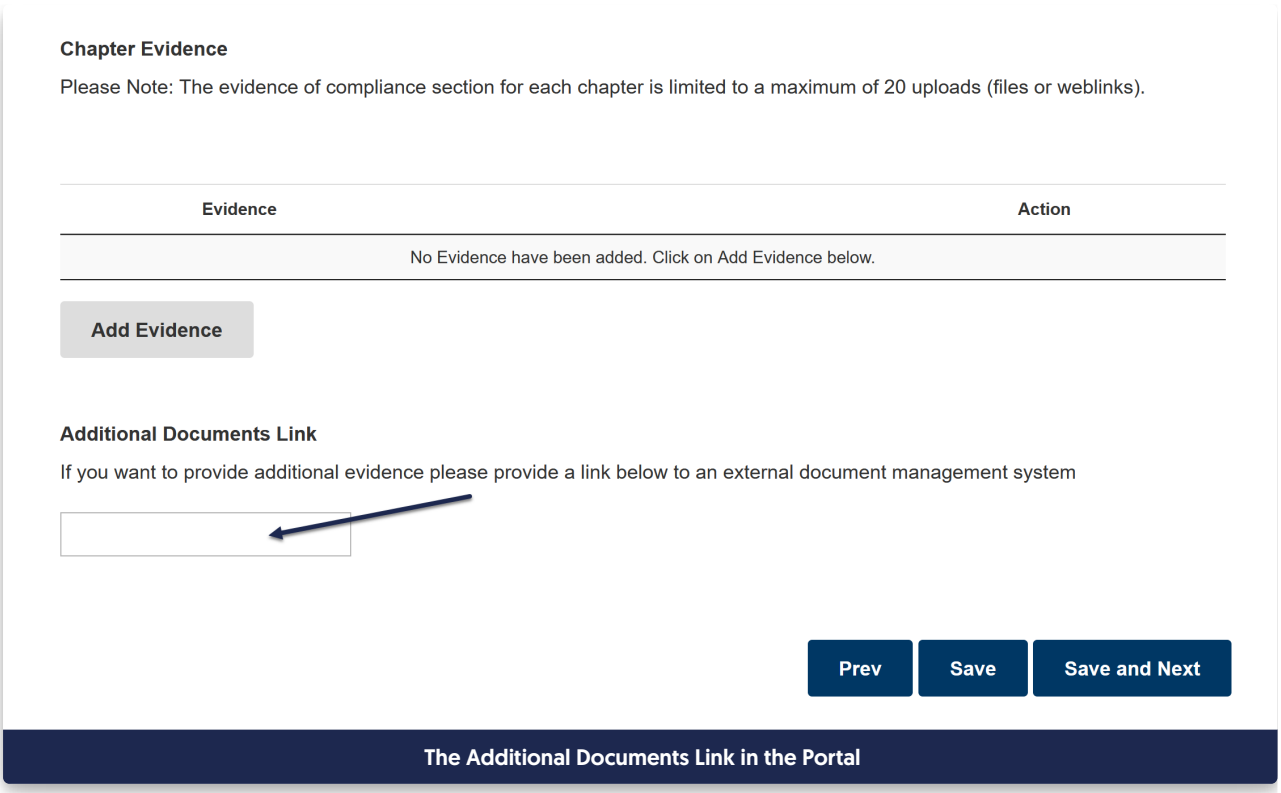
Copy/paste formatting issues

We've noticed two issues with copying and pasting between KnowledgeOwl and the NRPA Portal. These include:

- **Bulleted or numbered lists:** The Portal editor does not support numbered or bulleted lists at this time, so these will just become separate paragraphs.
- **Superscript or subscript references:** If you look at the screenshot of our sample standard in KO, you'll see we had two superscript references for 1 and 2, which corresponded to the documents in the numbered list. These were pasted in as straight numbers; you'd need to highlight these in the Portal editor and select superscript/subscript options to change the format.

Additional Documents Links

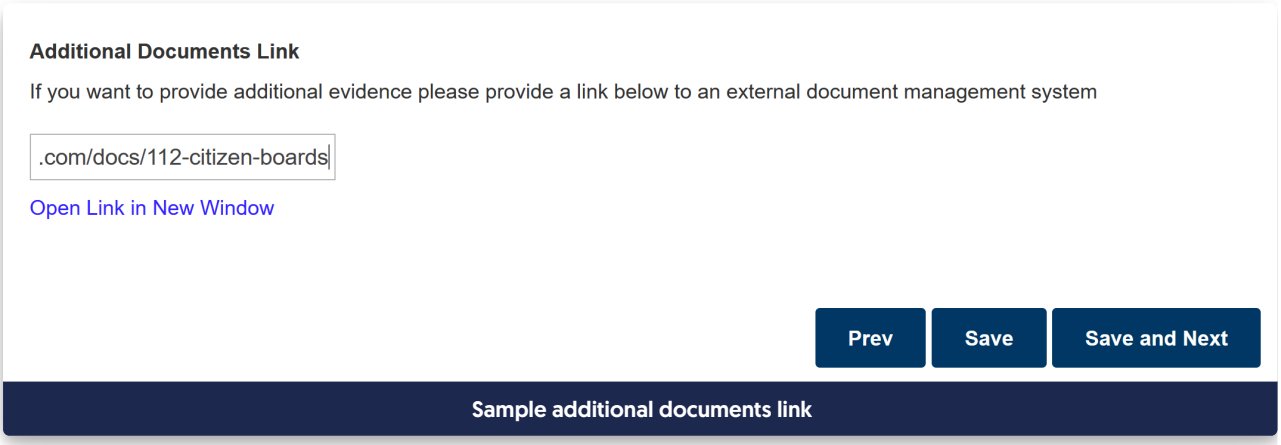
If for some reason you cannot add hyperlinks to all the documents you need within the standard, you can add a hyperlink to the full standard as it appears in KnowledgeOwl into the **Additional Documents Link** at the bottom of the section:



The Additional Documents Link in the Portal

Use the URL for the individual standard in this box; you can find this URL by clicking View KB and navigating to the standard, or by opening the standard to edit it and clicking the View Article link (this is discussed in more detail in The basics: editing standards in the View Article link section).

For example, if my knowledge base URL is https://sample-capra.knowledgeowl.com/docs and I want to direct someone to the 1.1.2 standard, I would copy the URL to it (https://sample-capra.knowledgeowl.com/docs/112-citizen-boards) and add it to the Additional Documents Link:



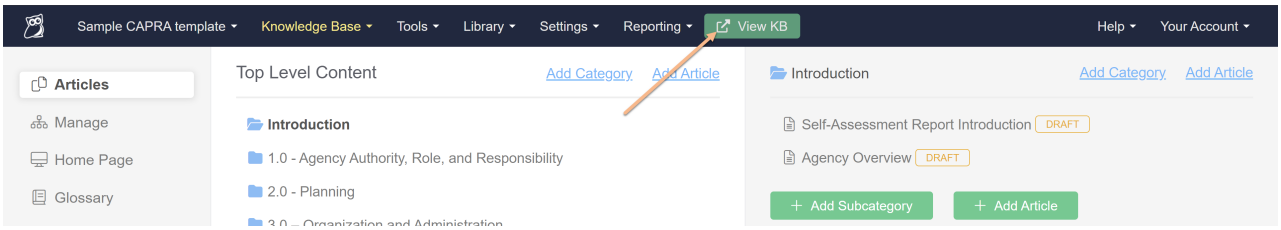
Sample additional documents link

If you have to take this approach, see How do I give reviewers access to my CAPRA self-assessment? to ensure you have your knowledge base access configured properly so that reviewers can log in.

Customizing your self-assessment knowledge base

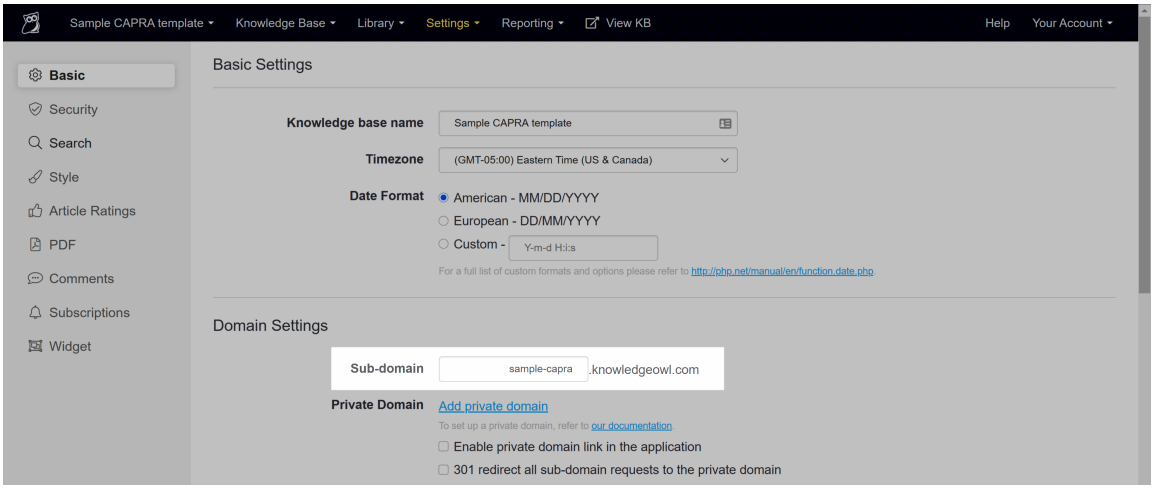
Last Modified on 01/27/2021 2:38 pm EST

If you're going to give reviewers or team members read-access to your standards or knowledge base, there are a few ways you can customize the look and feel to really make it your own. To see what the default settings we gave you will look like to a reviewer, you can click the **View KB** link in the top navigation at any time:

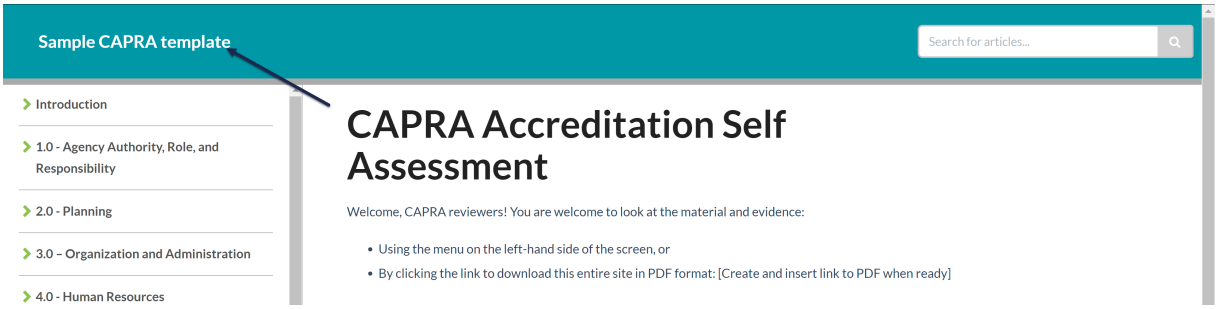


Here's a checklist of the changes our CAPRA customers most often ask about:

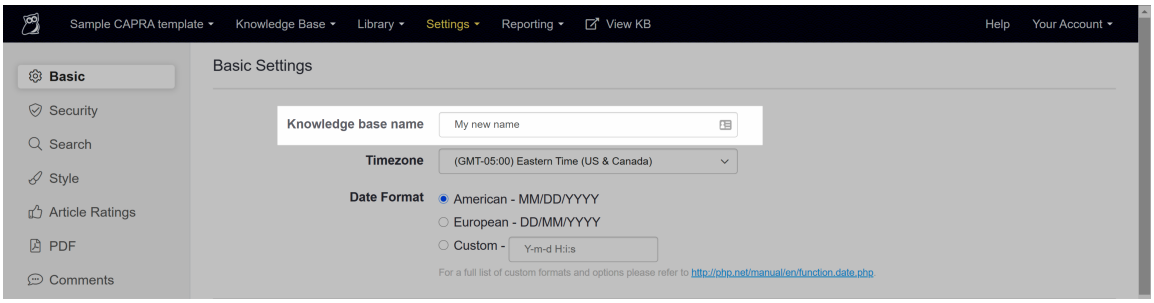
- **Change your knowledge base URL.**
  There are two sides to your self-assessment knowledge base: the app where you edit the content, and the actual knowledge base that you'll share with reviewers. You can change the URL for the actual knowledge base from whatever our staff set it up with.
  - You can see the URL that's being used by clicking the **View KB** link in the top navigation, or going to **Settings > Basic** and looking at the Sub-domain listed in the **Domain Settings**.



  - To edit the subdomain (the portion before ".knowledgeowl.com"), update the Sub-domain listed in the **Domain Settings** and click **Save** at the bottom of the page.
- **Change the name of your knowledge base.**
  When we created your knowledge base, we had to give it a name. This name is displayed inside the KnowledgeOwl app, as well as in the upper left of the knowledge base your reviewers will see. For example, my template was created with "Sample CAPRA template" as the name:



- To change the name we used, go to **Settings > Basic** and edit the **Knowledge base name** at the top of the **Basic Settings** section. Then click **Save** at the bottom of the page.



- **Add a logo to the upper left of your knowledge base.**
  When viewing the knowledge base, there is space to the left of the knowledge base name for a logo. If you'd like to include a logo or icon to represent your organization, you can add one in **Settings > Style**, in the **Logo** section. See Logos for more information.
- **Change the color palette used in your knowledge base.**
  We created your self-assessment knowledge base using our default color palette. You can change the colors used across your knowledge base in **Settings > Style**. See Custom Colors for more detailed instructions.
- **Change the text of the home page of your knowledge base.**
  By default, your self-assessment knowledge base includes the home page title "CAPRA Accreditation Self-Assessment" with some placeholder text below it. You can change the header and the main text by going to **Knowledge Base > Home Page** to change it, add images, etc.

  - If you'd like to include a full PDF download link for your entire knowledge base, you can generate one. See Standard PDF export (Full PDF Download) for more information on generating that export. Once generated, you can add a link to it in the table of contents.

> Note: this PDF doesn't automatically update, so you'll want to regenerate it before you send the knowledge base to reviewers!

- **Review the password/security settings of your knowledge base.**
  By default, your self-assessment knowledge base will be set to use a common shared password for all reviewers. You can see (and change) this password by going to **Settings > Security**. You can also set it to require no password, or use individual reviewer accounts, if you prefer. See How do I give reviewers access to my CAPRA self-assessment? for a full rundown of all the available options.

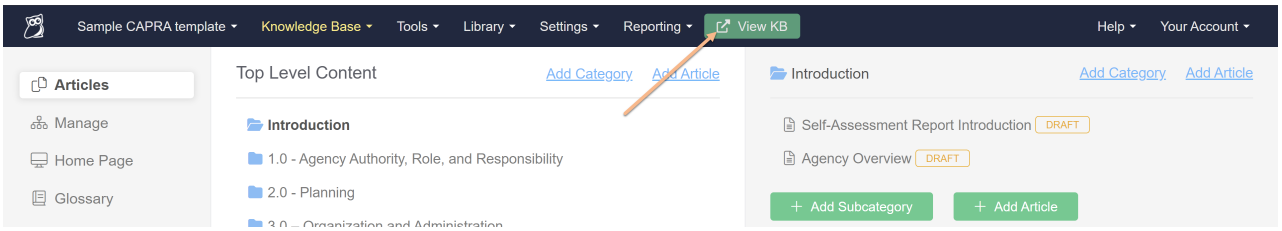
Granting access to your self-assessment

Last Modified on 05/29/2024 5:28 pm EDT

To access your self-assessment, reviewers will need two things:

- The URL for your knowledge base
- A login of some kind

For the URL: you can see the URL for the knowledge base by clicking the **View KB** link in the top navigation:



To change the URL of your knowledge base, go to **Settings** > **Basic** and update the Sub-domain listed in the **Domain Settings** section.

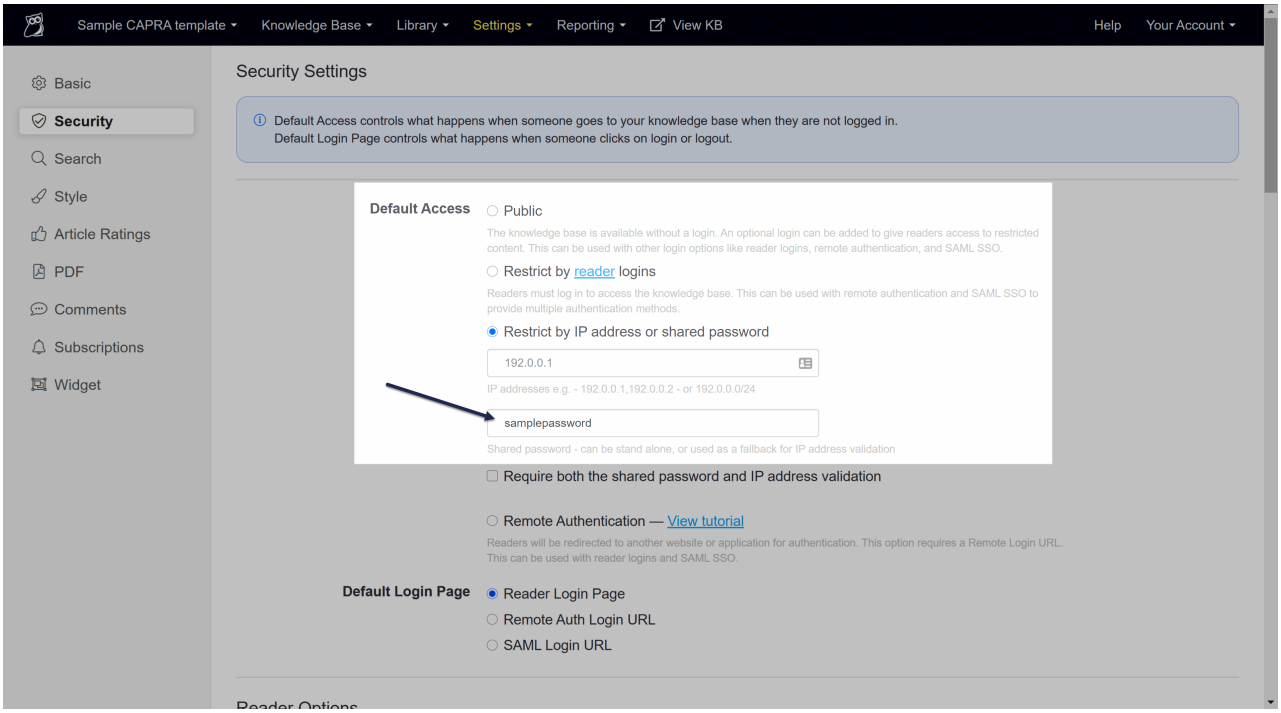
For the login credentials: see the sections below. By default, your self-assessment knowledge base has been set up with a Shared Password, but there are other options available!

Default setting - shared password

Last Modified on 05/29/2024 5:28 pm EDT

By default, when our support team gives you the CAPRA accreditation knowledge base, anyone who accesses the knowledge base's URL and enters a single, shared password will be able to gain access.

You can see the shared password by going to Settings > Security and looking in the Default Access section at the top:



To change the shared password, edit the password in the box above. Then click the Save button at the bottom of the screen.

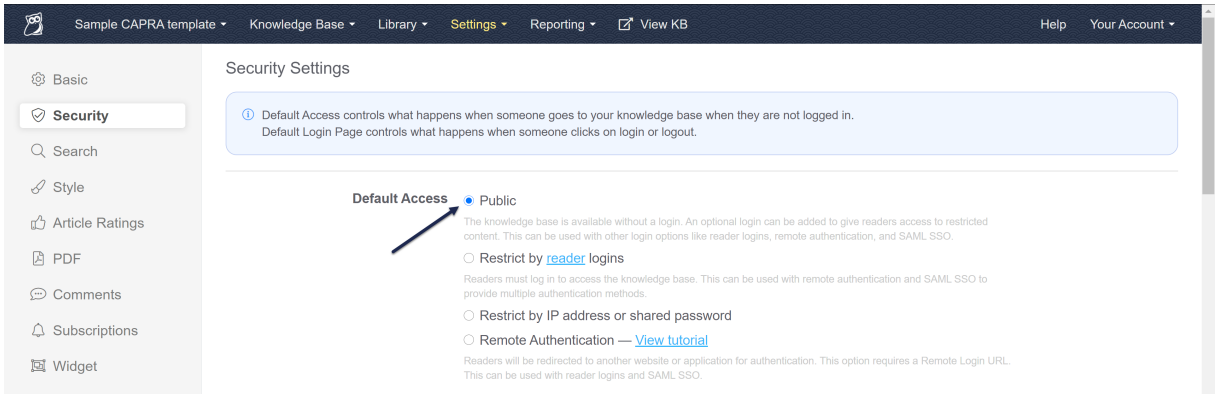
If you'd prefer not to use a shared password, see the sections below for alternate security arrangements.

No login required (publicly available)

Last Modified on 05/29/2024 5:28 pm EDT

Some organizations prefer to remove the shared password from their self-assessment knowledge base, so that anyone with the URL can access it. If you'd like to make this change:

1. **Go to Settings > Security.**
2. **In the Default Access section, click the circle next to Public.**



3. **Click the Save button at the bottom of the screen.**

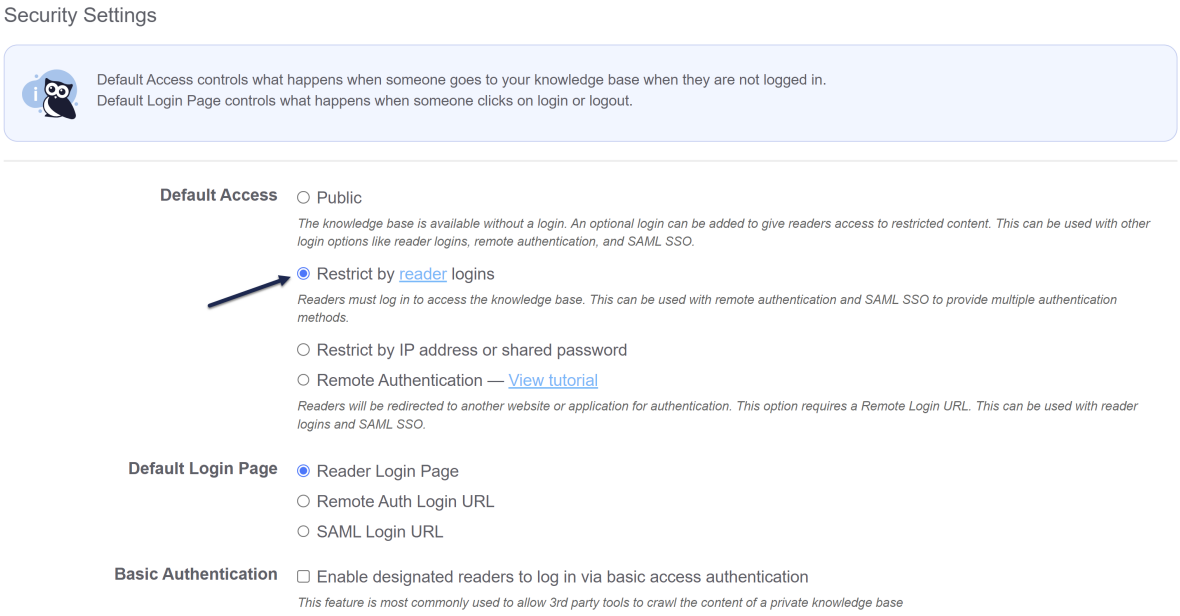
Individual reviewer accounts

Last Modified on 05/29/2024 5:28 pm EDT

Some organizations prefer to set up reviewers or teammates with their own individual accounts, rather than a shared password. This is a slightly higher level of security than the shared password, but it does require a little more setup at the beginning.

If you'd like to set up your knowledge base this way:

1. Go to **Settings > Security**.
2. In the **Default Access** section, select the option next to **Restrict by reader logins.**



3. Click the **Save** button at the bottom of the screen.

This will lock the knowledge base down to require individual reader accounts.

Once you know who your reviewers are, you'll need to create each of them as a KnowledgeOwl reader, using their email address. To create a reader account:

1. In the upper right, click **Your Account**.
2. Select **Readers.**
3. This will take you to the Readers index page, where you can create add your reviewers one at a time using the Add Single Reader option, or upload a spreadsheet with all your reviewers to create all the accounts in bulk. The Add Single Reader option is the easiest, and that's what we recommend using here. See our general help documentation on Creating a reader for full step-by-step instructions.

Optionally, you can also allow reader sign-ups. This would let your reviewers "sign up" to your knowledge base so that they'd request access and enter most of their information directly. This might be a smoother way for you to get reviewers set up with accounts without having to know their email addresses initially. For CAPRA accreditation, if you want to use reader sign-ups, we recommend:

- Requiring admin approval of sign-ups (outlined in steps 6 & 7 of the instructions linked above)
- Sending an email notification when a new reader signs up, sent directly to your own email address (outlined in steps 8 & 9 of the instructions linked above)

This ensures that random people aren't signing up and getting access to your accreditation, since you have to approve them, but makes it easy for reviewers to sign up and for you to know once a reviewer has done so.

Create a new standard

Last Modified on 05/29/2024 5:28 pm EDT

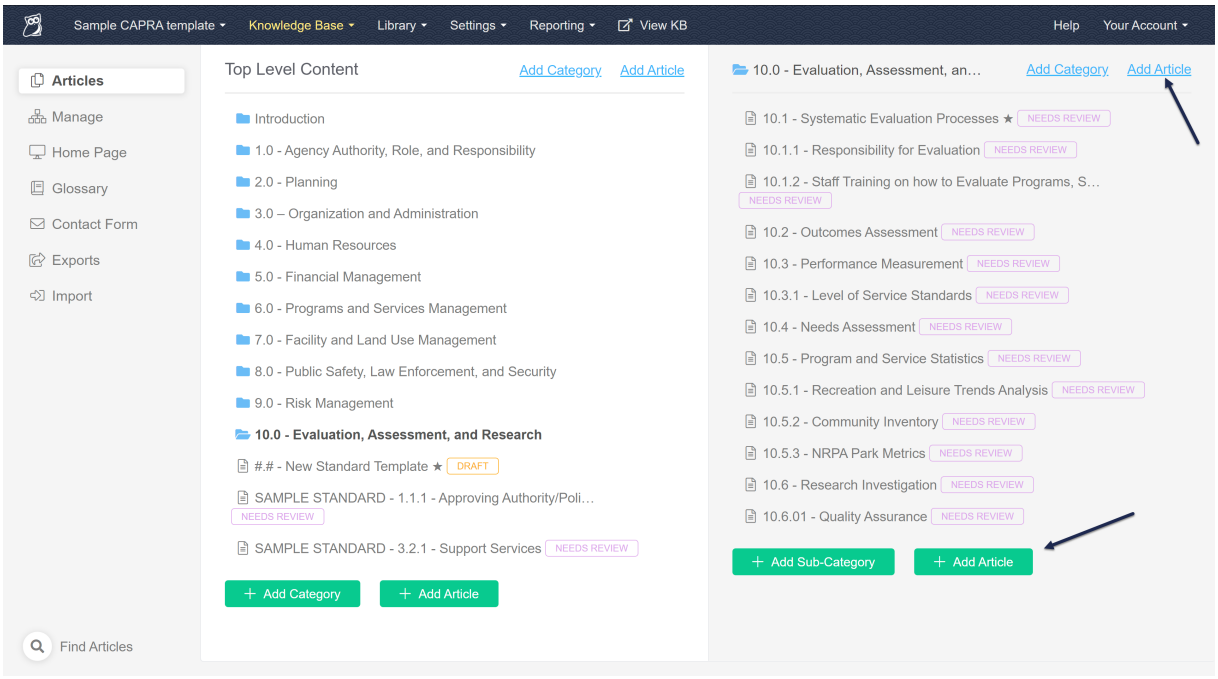
We do our best to provide you a self-assessment template that is accurate, but since NRPA is updating standards more frequently, there's a good chance you may need to create a new standard that doesn't exist in our template.

First, check if your self-assessment knowledge base has a top-level article called **#.# - New Standard Template ★**.

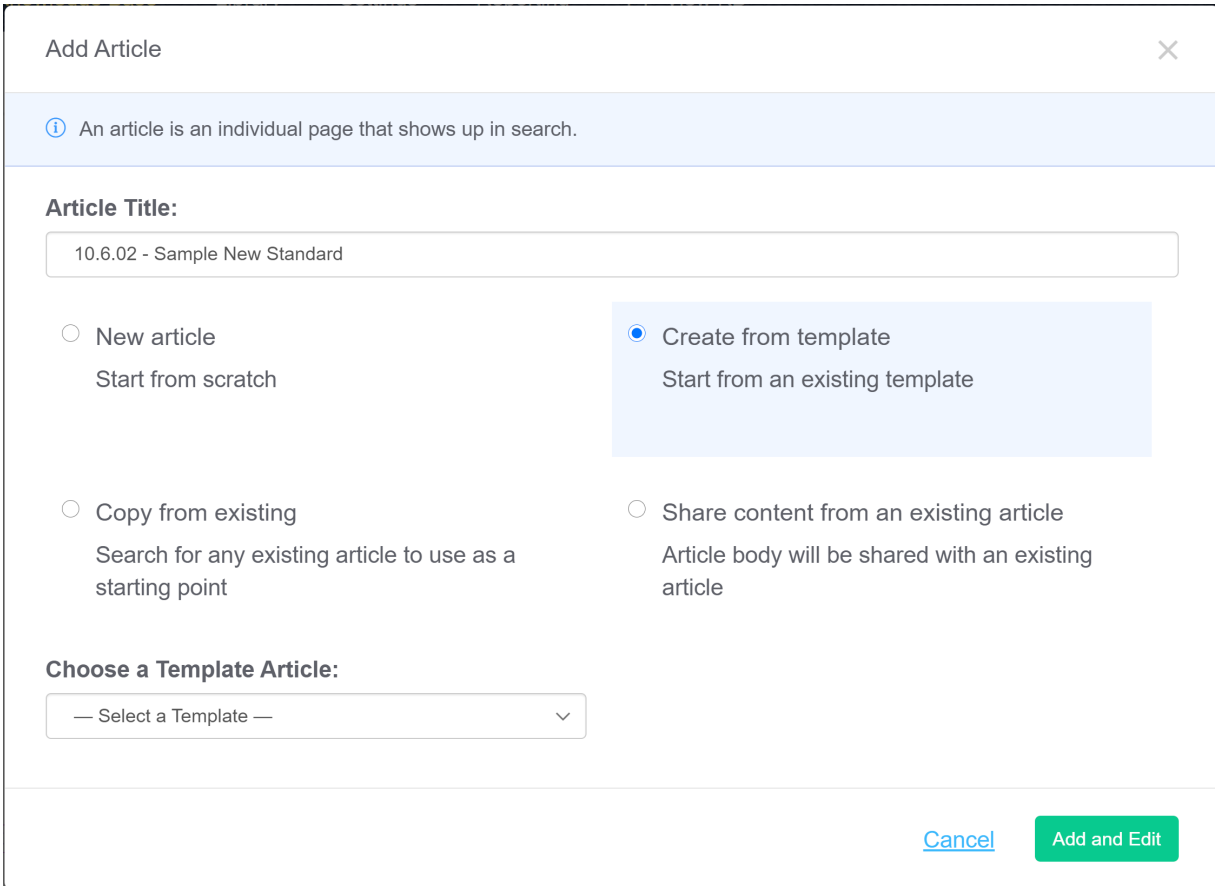
If you don't see this template, please contact us and ask us to create it for you.

Once you have the template:

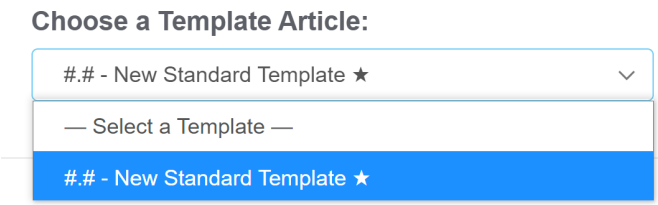
1. In the **Articles** page, click on the chapter you need to create the standard in. For example, if I need to create a new standard 10.6.02, I would click on 10.0.
2. In the grey righthand pane, click the **Add Article** hyperlink in the upper right, or the **+ Add Article** button below the list of standards.



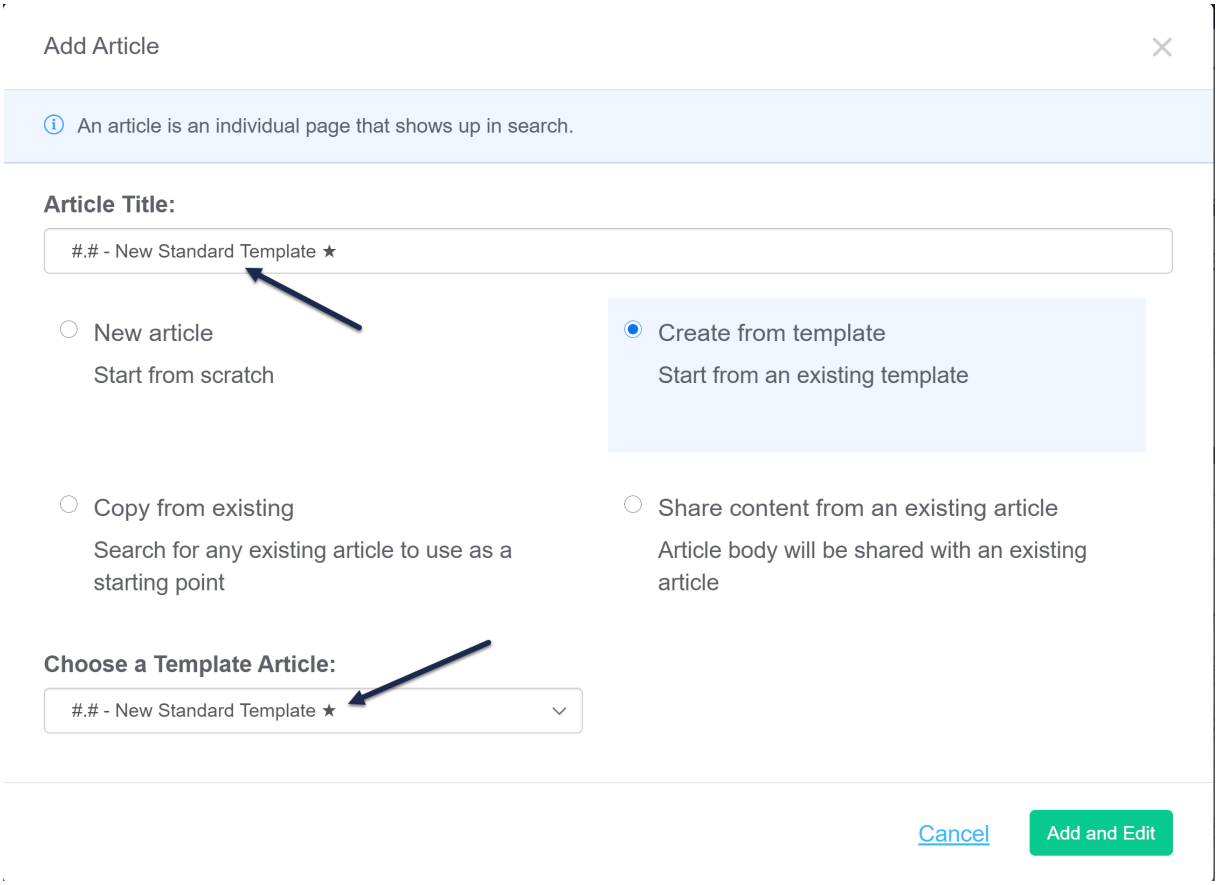
3. This will open a pop-up for you to create the new standard.
4. Beneath the title, click the radio button next to **Create from template.**



5. **This will add a dropdown to Choose a Template Article. In that dropdown, select #.# - New Standard Template ★. (It should be the only template in that list, unless you've created other templates.)**

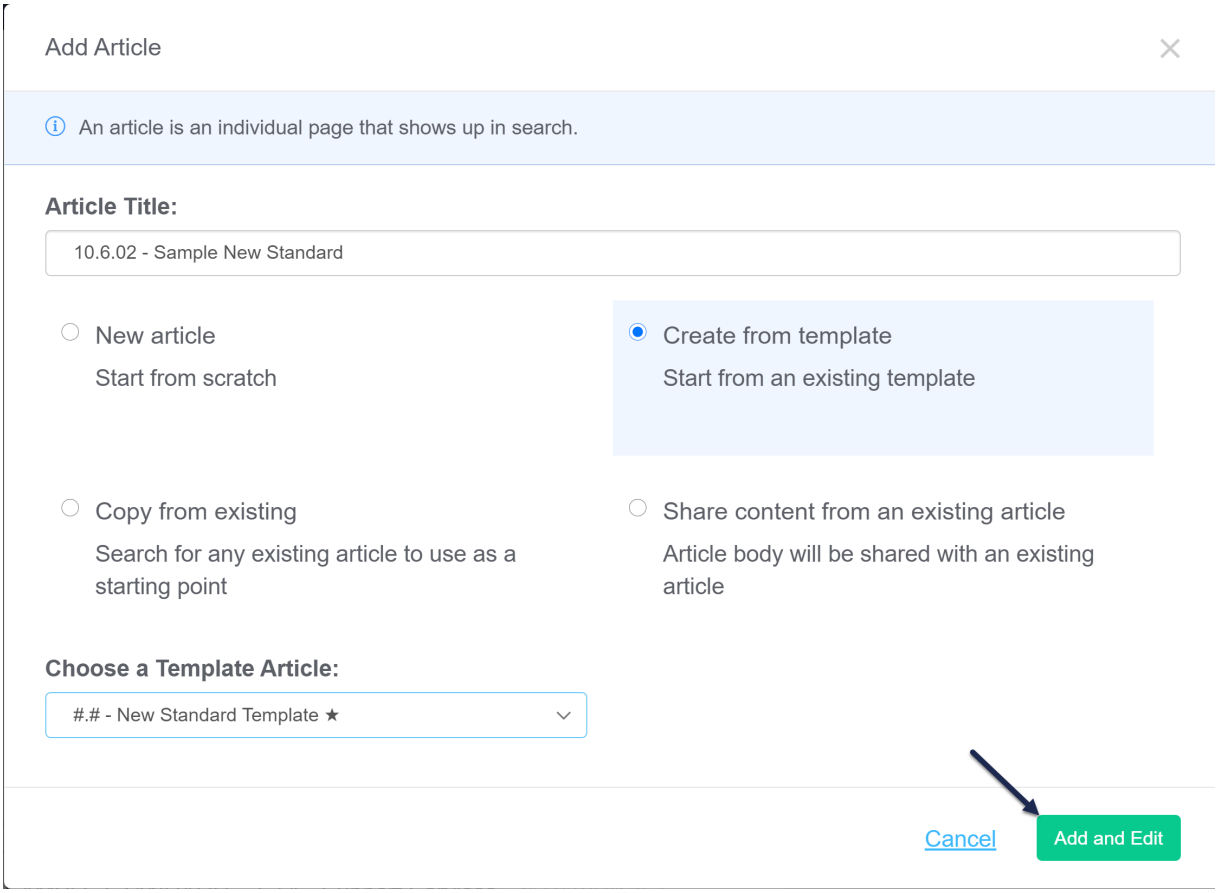


6. **Once you select this template, the Article Title will automatically copy the template's title.**



7. **Edit the title so it's appropriate for your new standard, using the same format provided by the template.**
    - **If the standard is a fundamental standard, keep the star in the title. If it's not a fundamental standard, remove the star.**

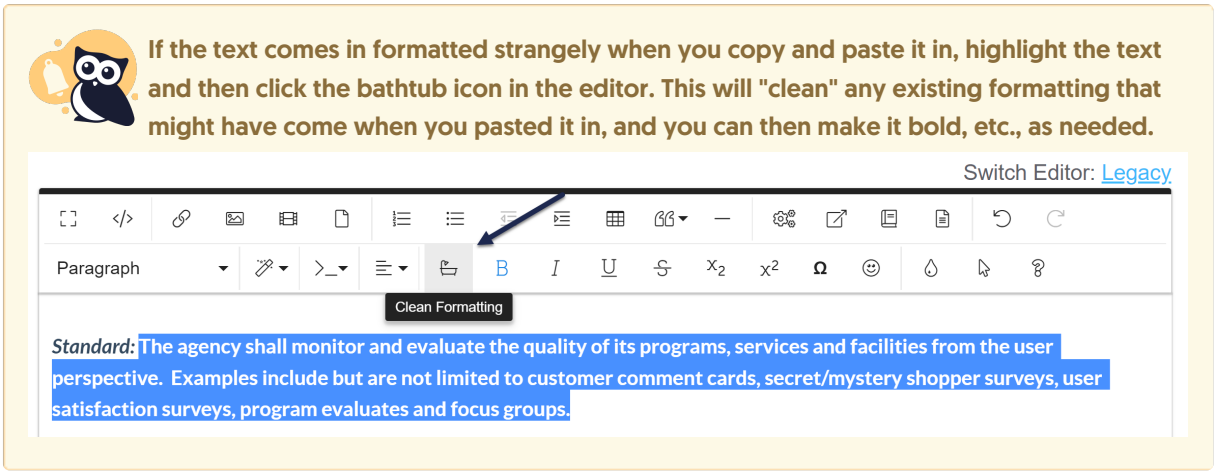
8. **With the template selected and the title added, click the Add and Edit button in the lower right. For this example, we will create 10.6.02 - Sample New Standard, which is not a fundamental standard, so we've removed the star.**



9. **This will create the new standard using the underlying template, and open it in the editor.**

10. **Review the title and the permalink that was automatically created, to be sure they make sense.**

11. **In the editor, add the appropriate text for the Standard (bold font) and the Suggested Evidence of Compliance (regular font). You should be able to copy and paste these directly from another source.**

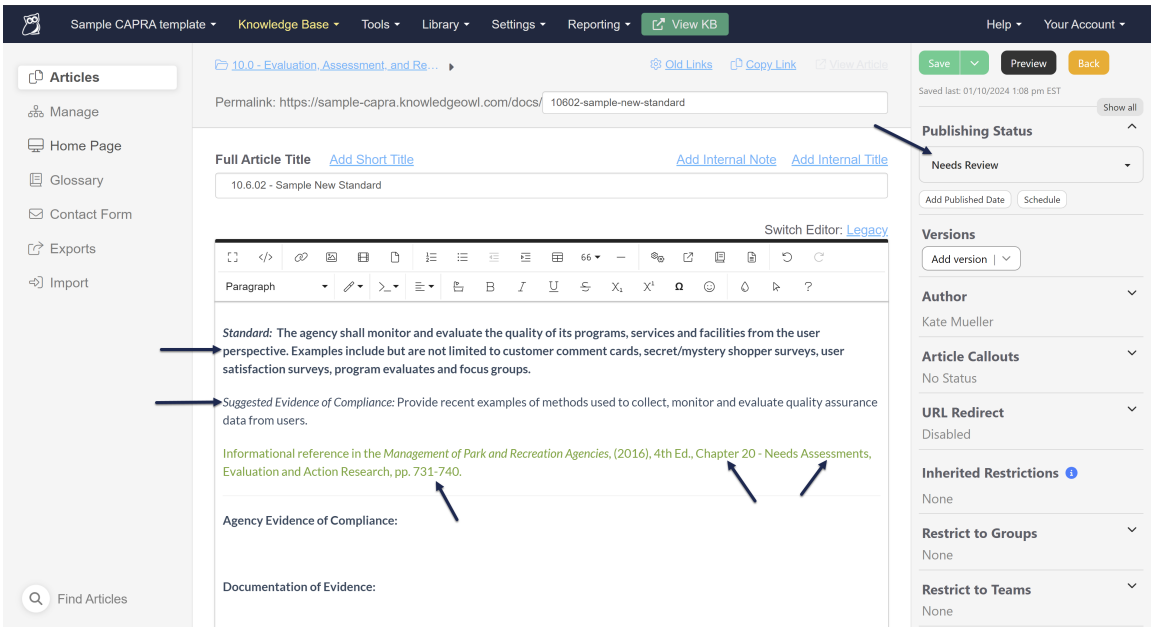


12. **In the Informational reference section, update:**
    a. **The Chapter #**
    b. **The Chapter Title**
    c. **The page numbers for the reference**

13. If this is not a fundamental standard (in other words, if you removed the star), delete the line that references snippet.fundamentalStandard. If this is a fundamental standard, don't touch that line.

14. In the upper right, change the **Publishing Status** to Needs Review.

    a. Here are the major fields you should have updated:

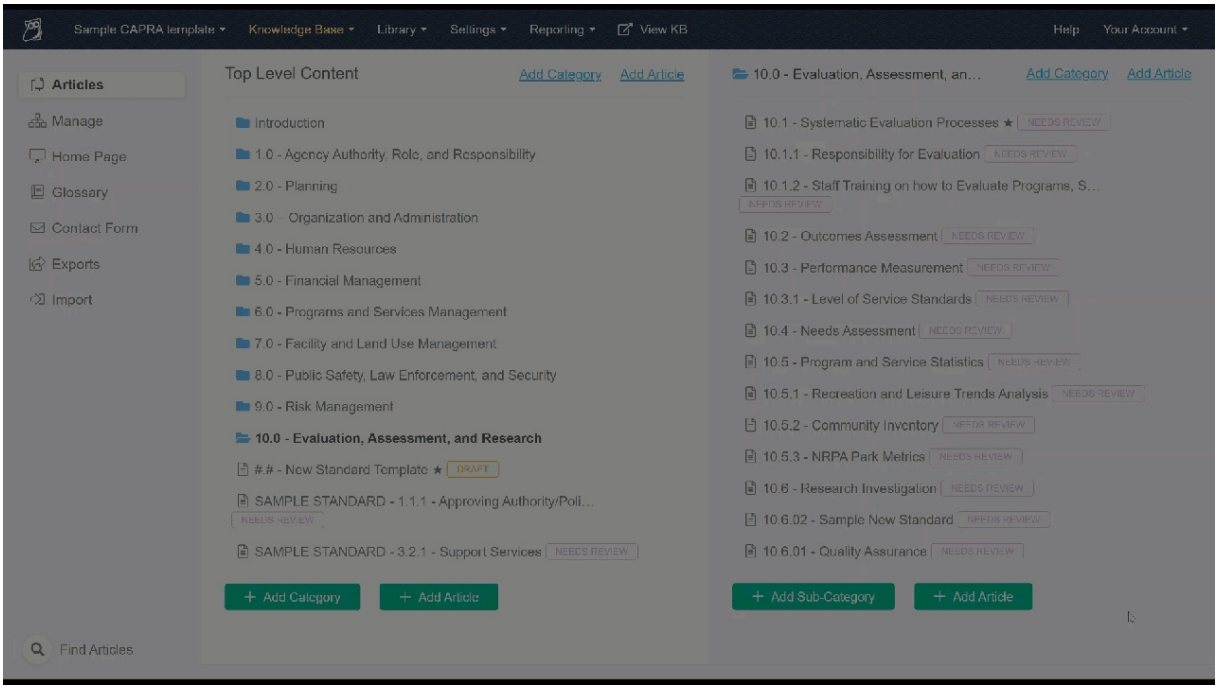


15. **Save.**

Your new standard will now exist in the chapter where you created it. It will automatically be created at the bottom of that chapter.

If you need to reorder the standards within the chapter:

1. On the **Articles** page, click on the chapter you'd like to reorder.
2. The chapter will open in the righthand pane.
3. Find the standard you need to move. Hover your mouse over the title. You'll see a set of up/down arrows appear.
4. Click on those arrows and drag the standard higher in the hierarchy where you'd like it to go.
5. Let go of your mouse button once you've gotten it to the correct place.


Sample CAPRA template
Knowledge Base
Library
Settings
Reporting
View KB
Help
Your Account
Articles
Manage
Home Page
Glossary
Contact Form
Exports
Import
Find Articles
Top Level Content
Add Category
Add Article
Introduction
1.0 - Agency Authority, Role, and Responsibility
2.0 - Planning
3.0 Organization and Administration
4.0 - Human Resources
5.0 - Financial Management
6.0 - Programs and Services Management
7.0 - Facility and Land Use Management
8.0 - Public Safety, Law Enforcement, and Security
9.0 - Risk Management
10.0 - Evaluation, Assessment, and Research
#.# - New Standard Template ★ DRAFT
SAMPLE STANDARD - 1.1.1 - Approving Authority/Poli...
NEEDS REVIEW
SAMPLE STANDARD - 3.2.1 - Support Services NEEDS REVIEW
+ Add Category
+ Add Article
10.0 - Evaluation, Assessment, an...
Add Category
Add Article
10.1 - Systematic Evaluation Processes ★ NEEDS REVIEW
10.1.1 - Responsibility for Evaluation NEEDS REVIEW
10.1.2 - Staff Training on how to Evaluate Programs, S...
NEEDS REVIEW
10.2 - Outcomes Assessment NEEDS REVIEW
10.3 - Performance Measurement NEEDS REVIEW
10.3.1 - Level of Service Standards NEEDS REVIEW
10.4 - Needs Assessment NEEDS REVIEW
10.5 - Program and Service Statistics NEEDS REVIEW
10.5.1 - Recreation and Leisure Trends Analysis NEEDS REVIEW
10.5.2 - Community Inventory NEEDS REVIEW
10.5.3 - NRPA Park Metrics NEEDS REVIEW
10.6 - Research Investigation NEEDS REVIEW
10.6.02 - Sample New Standard NEEDS REVIEW
10.6.01 - Quality Assurance NEEDS REVIEW
+ Add Sub-Category
+ Add Article

Update an existing standard

Last Modified on 05/29/2024 5:28 pm EDT

The most common change you may see from one year to the next in the NRPA standards are changes in wording for:

- The Standard itself
- The Suggested Evidence of Compliance
- The Informational Reference

To update these, you have two options:

- Update the standard as-is
- Create a new version of the standard and "activate" that version

The update option you choose depends a bit on how much work you've already done, and whether you want to keep an audit history of the change:

If you haven't yet added any evidence of compliance or documentation, we recommend **updating the standard as-is.** In this case, since you haven't already edited the standard in any way, the change doesn't seem meaningful. You can edit the relevant sections of text in the standard and Save it.

If you've added evidence of compliance or documentation, and you a) still feel it's all relevant, and b) don't need to maintain an audit history of when the change was made, you can **update the standard as-is.**

If you've added evidence of compliance or documentation and you would like to maintain an audit history of that previously-entered evidence, or when the standard itself was updated in your knowledge base,we recommend **creating a new version and activating that version.**

Creating a new version in essence creates a separate copy of the existing standard, which you can safely edit without touching the original version of the standard. The "active" version is the one displayed to your reviewers in the knowledge base; all other versions are only available in the app.

If you're maintaining your standards year-over-year as documents or policies change, versions can be a great way to maintain a full historical record of how you've updated your self-assessment over time. See Versions for more information on working with versions.

If you're creating a new version as a result of a standards change by the NRPA, we recommend adding a Version Note that explains why the new version was created. This just makes it a bit clearer for anyone editing the standard why there are multiple versions!

CAPRA accreditation via KnowledgeOwl

Last Modified on 05/29/2024 5:27 pm EDT

New Shorter Links

Last Modified on 05/29/2024 5:27 pm EDT

In the first of our upcoming SEO improvements, we have released the following:

- **Shorter simplified article links**
- **New root path option for KB URLs**
- **Article meta descriptions**

To simplify and avoid the false impression of depth, we are changing KB article links from:

/help/article/link/your-article — to the shorter — **/help/your-article**

Will old links / bookmarks still work?

Yep! All old links will be automatically forwarded with a 301 (permanent redirect) HTTP response.

If you want to force an update for Google you can generate a site-map and submit for indexing using Google Webmasters.

New root path available!

You can now choose whether you want the root bath of your KB to be **/help** or **/home**

After updating this setting, any requests going to /help will be 301 redirected to /home.

Article meta descriptions

With meta descriptions for articles, you can control the blurbs that search engines display under links.

You can also choose to use the meta description to be used for KnowledgeOwl's search by going to the settings page under Website Settings → Search.

September 30, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Added special support for Slack webhooks.

Blog Style and More

Last Modified on 05/29/2024 5:27 pm EDT

We have released the following improvements:

- **Blog Style category type**
- **Published date for articles**
- **Customizable article title tags**
- **New search option for partial matches**

Blog Style Category Type!

Use the new blog style category type to display a paginated list of all articles in reverse chronological order or the same order as the application.

These types of categories cannot contain sub-categories.

Article Published Date!

You can now specify a custom published date for your articles. This can be used in place of the standard date created or date modified that gets set by the system.

Custom Article Title Tags!

Instead of us defaulting HTML page titles to "Article Name | Site Name", you can now specify any title tag you like for your articles.

Partial Search Matches!

Previously, an article with the title "LongUniqueTitle Article" may not have ranked very high in search results for things like "Long" or "LongUniq". We have now added an option under settings which allows you to give more weight to those partial title word matches.

September 16, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Blog style category links in TOC were not clickable if they were inside another category

Feature Requests

- New version of Zendesk app for agents

More SEO & Meet Linus

Last Modified on 07/17/2024 12:22 pm EDT

We have released the following improvements:

- **Our new website built on KnowledgeOwl**
- **A new logo featuring our new mascot, Linus**
- **Homepage title tags and meta descriptions**
- **Upgrades to sitemap and self-referencial canonical links**

Our New Website!"

We knew we wanted a new website, and with all of the new features and functionality that have been added (thanks to all of you), we realized we could use our own application to build / host it.

Check it out!

After all, what better way to vet your software than to use it yourself?

New Logo and Mascot!

Introducing a fun, new logo with an owl who has been lovingly named Linus.

You'll be seeing him around!

Homepage SEO!

We've added the ability for you to set the title tag and meta description for your knowledge base homepage.

Sitemap Updates!

We've upgraded sitemaps to include categories and have added self-referential canonical tags to all pages to help with SEO.

August 18, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Allow authors to log in using Google
- Allow readers to sign up and log in using a Google account

Bug Fixes

- Last Updated date disappeared from search results.
- Blog style categories weren't properly linked in the table of contents.
- Insert topic article didn't work in custom content categories.
- Checkbox for Case Insensitive Login wouldn't update.
- Image class names were temporarily replaced with inline styles.

New theme and related articles option!

Last Modified on 05/29/2024 5:27 pm EDT

New theme and related articles option!

We have released the following improvements:

- **Brand new theme: Minimalist**
- **Backward linking related articles**

Minimalist Theme!

Using the awesome custom themes that you guys have built for your kbs as inspiration, we've come up with a brand new default theme of our own.

Featuring a pared down design with a slide out table of contents, we tried to put the focus on what matters: the content.

Wanna take a look? We've moved our own support knowledge base over to it, check it out!

Backward Related Articles!

Under **Settings → Basic → Website Settings** there is a new option to backward suggest related articles.

Okay this one is a bit hard to explain with words, but we'll do our best!

Say that we have 2 articles: **article A** and **article B**. With this option enabled, if you edit **article A** and add **article B** as a related article, **article B** will also automatically suggest **article A** as related.

Hopefully that makes a bit of sense!

August 10, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Version previews for custom content categories
- Ability to unlink shared articles in the editor
- Ability to copy articles on other author teams
- In-line display option for articles in category pages

Custom 404 Pages!

Last Modified on 05/29/2024 5:27 pm EDT

Branding is important. Even when people wander into dark scary corners of your site that you have no idea how they found.

And that's why we're happy to announce customizable 404 pages!

Like our other customizable pages, you now have control over the HTML of your site's 404 page which can be found by going to:

Settings → Style → Custom HTML → 404 Error Page

Give it your own flair and get those lost puppies back home!

August 8, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Upgrades to the new editor (highlights)

- URL detection while typing
- Improved pasting from Word and Excel
- Add trademark character to special characters plugin
- Enable pasting images in Safari from the clipboard
- Add a new line after/before the last/first element when clicking at the bottom/top of it
- Word paste was not detected in IE (fixed)

Feature Requests

- Allow "nodownload" attribute for videos in new editor
- Allow MathML tags in new editor to display equations using MathJax plugin.

Bug Fixes

- HTML zip exports sometimes didn't contain all articles.
- Hide from navigation wasn't hiding from blog style categories.
- New editor was stripping out video attributes to allow fullscreen (webkitallowfullscreen, mozallowfullscreen, allowfullscreen).
- Shared articles were slowing links to deleted kbs.
- You couldn't un-italicize headers in the new editor.
- Editor was stripping out fullscreen and nodownload attributes from video embeds.
- Clicking the table of contents options would make content list options disappear.

July 19, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Automatically display new comments when automatically approved (no refresh required)

Bug Fixes

- The image style (magic wand) option disappeared in the new editor. We brought it back.
- European date formats and published dates weren't playing nicely together, and published dates were display as 31/12/1969. Now they should be displaying properly.
- Some new article pages were only displaying 9 articles with a broken next button. They should be working properly now.
- Snippets stopped working in article blurbs. That's been fixed.

New Widget & Contact Form Enhancements!

Last Modified on 05/29/2024 5:27 pm EDT

Happy holidays everyone! In this latest release we have added the following:

- New responsive widget type
- Ability to allow end-users to choose which email address a ticket should go to
- Ability to opt out of KnowledgeOwl storing ticket information

Responsive Widget Embed!

This newest widget version was designed to be fully mobile responsive and slides out from the side of the page instead of popping up an overlay.

End-users using this widget will be able to search for help, view help articles inside of the widget, and submit support tickets without having to navigate away from your application.

This new widget also remembers the last article end-users were looking at.

When an end-user views an article inside of the widget, they can close the widget or navigate to a different page and when they open the widget back up, they will be taken right back to the article they were last viewing.

Wanna check it out?
Click on Help → Contact Us

Contact Form Emails

We've added the ability for you to specify multiple possible email addresses to send support tickets to.

When using multiple emails, the end-user will be able to select the appropriate team from a dropdown in the contact form.

Contact Form History

We now allow you to specify that any information collected from tickets submitted via the contact form should not be stored in KnowledgeOwl.

While we don't recommend using this setting, your data is your own and we respect that!

January Updates!

Last Modified on 05/29/2024 5:27 pm EDT

We hope everyone had a wonderful h**owl**iday season! It's been a while since our last update, so we have a lot to share. Here's what we've been up to:

- Article Editing Author Collision
- Meta Title & Description for Categories
- Image Captions in New Editor
- Admin Pages Author-Role Permissions
- SAML SSO Security Enhancements
- Reporting Dashboard CSV Exports
- Reader List CSV Export

Article Editing Author Collision!

We are happy to announce that we have added author collision detection for article editing.

You will now notice a red or yellow callout around the wysiwyg editor and small icon(s) to the top left alerting you that other people are looking at or editing the article you are in.

If the article has been updated since you opened it, when you try to save you will be presented with the option to either keep your changes or discard them.

Meta Title & Description for Categories!

Keeping in line with our focus to improve SEO as much as we can, you now have the ability to add HTML meta titles and descriptions to category landing pages.

Like with articles, if you do not specify your own meta information we will fall back to our best guess.

Image Captions in New Editor!

In the new wysiwyg editor, we have added the ability to easily add captions to your images.

To use this new feature, click on an image and in the resulting options shown, click on the talking bubble icon.

Admin Pages Author-Role Permissions

You can now use our custom author roles to determine which admin pages your authors should have access to.

Do you have someone that needs to be able to update the style of your knowledge base but nothing else? Or maybe you need to allow them to create exports of your content.

By going to Account → Authors → Roles, you can create a custom role with those permissions.

SAML SSO Security Enhancements

We have added several additional security options to our SAML SSO integration.

These new options include the ability to require signed assertions, and also to encrypt them.

To see all the new options, take a look at Settings → Security towards the bottom of the page.

Reporting Dashboard CSV Exports

Each of the reports that are available to you on the main reporting dashboard page are now available to export as CSV.

Import the data into Excel and dive in to figure out how best to improve your knowledge base.

Reader List CSV Export

Like with the reports, you can now also export your full list of readers to CSV.

Go to Account → Readers to export and see who has access to what.

July 11, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- New setting to automatically approve comments
- New option in content list subcategory display type to show all content (not only the first 5)
- Ability to create trials with more than 1 kb or author from the website

Bug Fixes

- Feedback messages were not appearing consistently.

Article Templates!

Last Modified on 05/29/2024 5:27 pm EDT

We are happy to announce that we have released the ability to mark articles as templates. Marking an article as a template allows you to more quickly and easily choose it as a starting point for new articles.

When you choose to add a new article, you will now see the option to "Create from template". When selected, Articles that have been marked as templates will appear in a quick and easy dropdown menu.

We have also added new author role options that allow you to more selectively decide which type of articles an author can create. For example, you can now create an author who is only allowed to create articles from existing templates which can create a much more guided experience.

June 29, 2017

Last Modified on 07/17/2024 12:22 pm EDT

Feature Requests

- New permissions in custom roles to restrict the ability to:
  - Edit homepage
  - Add, edit, and delete glossary terms
  - Edit and delete files in the file library
- Wider label displays in the file library
- Shared articles now display a helpful list of where the article is linked.

Bug Fixes

- Users with super secure passwords were having trouble logging back in after using some special characters. Now you can set your password to something uber secure AND log in with it :)
- If you ran into an error importing glossary terms, there was no error messages. Now you get error messages and helpful feedback on what went wrong. Progress!
- Double-clicking to create articles and sub-categories were double creating articles and sub-categories. That shouldn't happen any more.

New Reader Signup Options!

Last Modified on 05/29/2024 5:27 pm EDT



Note: These features are only intended for self-administered readers

In this weeks release we have added the following features:

- Reader signup notification emails
- Reader signup approval process
- Automated reader groups by domain

Reader Signup Notification Emails

You now have the option to receive notification emails whenever someone signs up as a reader to one of your knowledge bases.

To find this and the other new settings, go to:

Your Account → Readers → Settings

Reader Signup Approval Process

When a reader signs up to your knowledge base, you can now require that their access is approved by a KO admin.

Once an admin approves their access, they will be emailed with their login credentials.

Automated Reader Groups by Domain

We have added the ability to assign readers to reader groups automatically based on their email domain.

You can either choose to set the groups once on the initial reader signup, or you can choose to update the readers groups each time they log in based upon the rules.

June 16, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Someone ask for a "No Teams" filter in Manage? Owl ready if you want to check it out!

Bug Fixes

- `.ko-pdf-clickable-link {display: initial;}` was not working in standard or custom PDFs. It is now.
- Articles with large PDFs were showing up in almost owl the search results. We stopped indexing externally linked PDFs as well as PDFs uploaded in KO with over 100 pages. We're looking at you, Environmental Protection Act of 1970.
- Manage filters with Needs Review and author teams were not inheriting author team permissions from parent parent categories. Owl better now.
- New articles were displaying in a confusing order for some customers. We were sorting by new callout icon articles first, date published (if set) next, and then date created – but, when owl is said and done, we were always displaying date created. If set, we now show the date published to eliminate this confusion.
- Customers were previously able to skip required fields during SAML reader mapping. Now we have error messages. Owl right.
- Some articles were getting mysteriously updated with no revision history. After some serious troublesHOOTing, we tracked it down to PDFs. Remember those large PDFs causing search issues? They also caused some individual PDFs not to generate, so when people would try to download them, the article would reindex to regenerate the PDF, causing the date to update. Regenerating PDFs will not longer update the date last updated.

Spring Releases!

Last Modified on 05/29/2024 5:27 pm EDT

Lots of good stuff in this one:

- Topic-based category type
- Topic articles
- Category type cleanup
- Internal article titles
- Add tags to articles in bulk
- Import and export glossary terms
- Reply-to and from name for comment emails

Topic-based Category Type

This new type of category allows you to display the full-text of all articles inside of it like chapters in a book. Use it for FAQs, Q&As, or roll-up style landing pages that can stand alone.

Topic Articles

This new internal article flag can be used to signal that the article's content can be embedded into another article. In the new article editor you can search for articles marked as topic articles and include the content as a mergecode.

Category Type Cleanup

In an effort to simplify and clarify the different types of categories that we offer, we have merged "Basic" and "FAQ style" categories into a single default category type.

This default category type includes the display options of the old FAQ style category and also allows control over how the category behaves in the table of contents.

Existing basic and FAQ style categories are automatically set to the new default type.

Internal Article Titles

We have added the ability for authors to add an internal facing title to articles. These internal titles can be a helpful way for authors to differentiate articles that share the same reader facing title.

Add Tags to Articles in Bulk

On the manage screen, we have added the ability to add tags to multiple articles at the same time. To use, select multiple articles and click on the bulk edit button.

This feature is additive only and will not remove tags from articles.

Import and Export Glossary Terms

We have now added the ability to export your glossary terms to a CSV. You also have the ability to import or update glossary terms from a CSV file in bulk.

Reply-to and From Name for Comment Emails

Previously, comment notification emails would always have the reply-to "support@knowledgeowl.com" and the from name "KnowledgeOwl Support".

You now have the ability to specify your own reply-to and from name.

June 9, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- The widget is owl the rage right now, and someone made the observation that you couldn't get to ours without clicking on Help > Contact Us. Well, we remedied that right up. Clicking Help now launches the widget, powered by KnowledgeOwl.
- Speaking of the widget and contextual help, we added the ability for you to delete pages in the Widget report. HOOT if you like cleaning up your widget report!
- That silly widget also didn't have a name field on the contact form, but, owlelujah, it does now.

Bug Fixes

- Manage > Needs Review did not show owl articles in Needs Review. Don't you worry 'cause it does now!
- The Last Updated field in the contact form search results was displaying 12/31/1969 for all articles owl of a sudden. The correct dates are displaying now, and you can learn more about epoch and why it shows up randomly here.
- When creating readers from a spreadsheet, reader groups were not getting properly assigned. Owl should be working properly now.
- Not choosing a group or site column from the spreadsheet when importing readers was adding reader to all groups and first site. Not owlright. We fixed it so that the help site is now required, and not assigning a group doesn't assign any groups.
- Custom fonts stopped working in both editors, but like The Terminator, they said "Owl be back". And now they are.
- Silly new editor was stripping fullscreen attributes for videos, but it's not any more. Hoot for the moon and go full screen!
- "Currently using x out of y available authors" was always shows x as 50 if you have more than 50 authors. X now displays the correct number, and owl is right with the message on the Authors tab.
- The suggest API endpoint was breaking with multibyte languages like Chinese in the article summary. Owl better now.
- Sub-categories in Content List pages did not display in app order. What the hoot? Anyway, they do now.

Owl for one and one for owl.

File Library Updates

Last Modified on 05/29/2024 5:27 pm EDT

Updating our file library has been a long time coming, so we are very excited to announce the following improvements:

- File labels
- Add file labels in bulk
- Delete files in bulk
- Improved file library interface
- Improved file picker interface

File Labels

You can now add labels to organize your files and images. Labels can help you quickly group and filter specific files. We've also added the ability to add labels in bulk to make the process a little faster and easier.

Improved File Library Interface

In addition to labels for organization, we've made the following improvements:

- Filter by labels or file types
- Show 20, 50, or 100 files at a time
- Icons for common file types (PDF, Video, Word, Excel, PowerPoint)
- Delete in bulk

Improved File Picker Interface

In the new editor, the Insert Image, Insert Video, and Insert File will each have their own Add from Library option and only show the appropriate file types. In addition to searching by file name, you can also search by label.

June 4, 2017

Last Modified on 05/29/2024 5:27 pm EDT

New editor upgrades (highlights)

- New option to keep or clean Word formatting when pasting from Word
- Detect and convert email addresses to mailto links

Bug Fixes

- Daily comment notifications emails were sometimes going to the wrong place.

May 31, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Widget search wasn't working properly when hitting enter/return
- In certain situations, restricted articles were incorrectly displaying in new and updated widgets
- Topic merge codes were displaying in article blurbs
- Snippets were displaying in article blurbs
- Fixed spacing issue in automatically generating article blurbs (snippets)
- Reader login pages were not redirecting to the originally requested article after login

Webhooks

Last Modified on 05/29/2024 5:27 pm EDT

We are excited to announce the addition of webhooks which can be used to receive notifications about activity in your account. Add and manage your webhooks by going to **Your Account → Webhooks**

Webhooks for Slack

Does your organization use Slack? Combining custom author roles and Slack webhooks can be a powerful way to manage your content creators.

Check out this article to see how webhooks can benefit you.

Webhooks for the API

If you don't use Slack but still want to receive notifications, you can create an API webhook that will post data to an endpoint of your choosing.

For example, you could set up a "Zap" using Zapier that sends a text message anytime someone submits a comment in your knowledge base.

Want full control? Create your own consumer endpoint to receive post information to your server and take action based on the type of event.

May 30, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Removed timezone from date created in reader exports so you can filter by date in Excel

Snippets Overhaul

Last Modified on 05/29/2024 5:27 pm EDT

Snippets are finally getting the attention they deserve.

Improvements include:

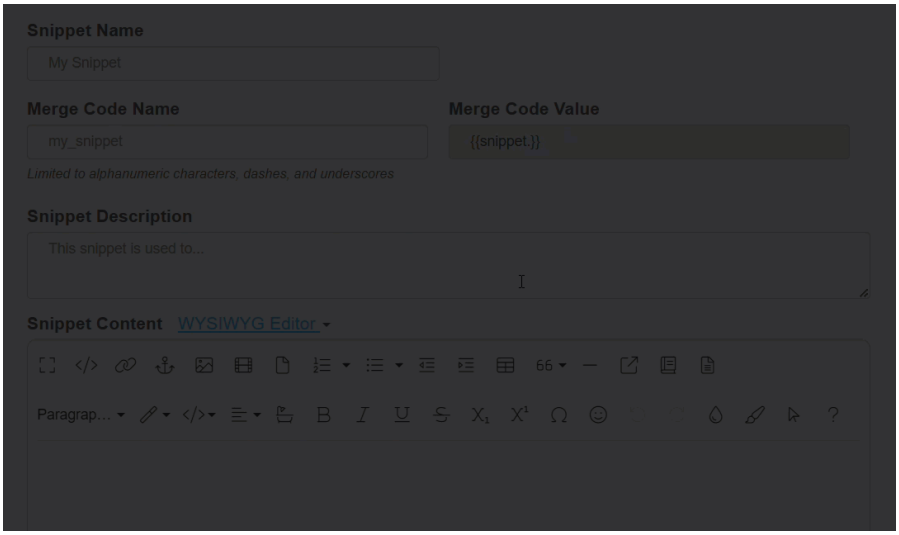
- UX redesign of the snippets list and snippet editor pages
- WYSIWYG or code editor
- Snippet descriptions
- Restrict snippets to reader groups
- Secure API merge code

UX Redesign

1. Snippets are displayed in an easy to scan format.
2. Search for snippets by name, merge code, or description.
3. The snippet editor is more like the article editor, with meta data up top, a large content editing space, and administration options like restrict to reader groups on the right.

WYSIWYG or code editor

Easily switch between the default WYSIWYG or code mode.



The WYSIWYG allows you to create snippets with no coding required. Use Code Editor for adding styles and script snippets.

Snippet Descriptions

Add descriptions to explain what your snippet does, where it's used, how it works, or other helpful tidbits.

Snippet descriptions are displayed both in the snippet list and when a snippet is added to an article.

Restrict Snippets to Reader Groups

You can now conditionally display snippets to your readers based on reader groups.

For example, you could create a snippet about upgrading to a paid account that you only want to display to your free or trial customers. If you restrict the snippet to those groups, no one else will see the message.

Secure API Merge Code

Sometimes you might want to use a client side API call to your account data.

You can now use our KnowledgeOwl API merge code in snippets to do a client side API call without exposing any sensitive information.

Learn more here.

Updates to topic display categories

Last Modified on 05/29/2024 5:27 pm EDT

The following features and functionality have been added to topic display categories:

- **They look like articles!**
  Topic display categories will now have the same template as your articles. This allows them to have share options (download to PDF, print, email), ratings, comments, and related articles.
- **They show up in search!**
  Like articles, topic display categories will now show up in search and reporting. You can also add tags or search phrases.
- **You can override child article links!**
  Rather than opening child articles on their own page, you can choose to point their links to the corresponding section on the topic display category page.

These features and functionality are available for all new topic display categories. Existing topic display categories will be updated to the new version next time they are saved.

Notes

- New topic display categories might look slightly different due to the update. If you are worried, we recommend creating a test topic display category with a few test articles to see how it looks before updating your existing categories. Contact us if you need any help!
- Topic display PDFs are re-generated when you save the category. In order to keep these PDF up-to-date, save the category when you make changes to any articles inside. These PDFs will not include restricted articles.
- When using Override Article Links, you can still get to the individual article by appending "?solo=true" to the URL. Otherwise the individual article link will navigate to the corresponding section on the topic display category page.

July 25, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes:

- Removing a label from a file and saving it was not properly removing the label
- Bulk importing readers was causing login issues when the readers' email addresses were using capitol letters
- Using the "Exclude from search" setting in articles was preventing their viewed count from incrementing correctly

May 27, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Subcategory display type merge codes for custom content categories
  - [template("content-list")]
    The template content-list merge code will display subcategories in content list format.
  - [template("panel-list")]
    The template panel-list merge code will display subcategories in subcategory panel format.
- Use the page query strings to suggest content in the widget and replace matched RegEx patterns in the recommended article URL with {custom}.

July 21, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes:

- In certain circumstances, authors were unable to delete categories even though they had the correct permissions to do so
- Articles within the JS widget had errors in the way the HTML was returned

May 15, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Import from Zendesk or Freshdesk

May 25, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- OAuth authentication for the widget

External URL Articles and Categories

Last Modified on 07/17/2024 12:22 pm EDT

By popular request, we've added the ability to create categories and articles that link to external web pages.

This can be very useful if you have a company web page, blog, or other external content that you want people to be able to get to from your knowledge base with one click.

External URL Categories

For categories, we've created a new type that you can choose either when creating the category or editing it.

Enter in the URL that you want to link to and choose whether you want the link to open in a new tab or the current open tab.

The category will still show up in your site in all of the normal places such as the table of contents and the homepage panels.

External URL Articles

For articles, we've added the external URL setting to the article editor page. From inside the editor, choose External Redirect to set the link and choose whether to open in a new tab or not.

The article will still show up in all the normal places like the table of contents and search, but clicking on it will redirect to your chosen URL.

This option can also be used to redirect old articles to new ones!

Brand New Look

Last Modified on 05/29/2024 5:27 pm EDT

It's been quite a while since we've updated the look of the application. With spring in the air (for those of us in the upper hemisphere at least), the time felt right for a fresh new style.

Don't worry! We've left the application functionality and feature locations alone. We want this to be as unobtrusive as possible, so we stuck to refreshing colors, buttons, and other styles.

If you find something that isn't working, please let support know and we will get it fixed ASAP.

May 9, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Ability to organize the file library using labels
- Add file labels in bulk
- Filter by labels
- Filter by file type
- Show 20, 50, or 100 files per page

May 1, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Filter by date fields in the API

Bug Fixes

- Some non-admin authors were seeing errors trying to update their passwords in the application.

GDPR Updates

Last Modified on 05/29/2024 5:27 pm EDT

Happy GDPR Day!

We've updated our privacy policy to be GDPR-compliant. We've cut out legalese and used clear language.

Data Processing Addendum

If you are subject to the GDPR, you can sign our Data Processing Addendum (DPA) for compliance.

For more information, visit our KnowledgeOwl and the GDPR page in the knowledge base.

C is for Cookie

You can read more about our cookies, withdraw consent, or change consent anytime on our Cookie Declaration page.

April 27, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Gated cascading reader logic
  Previously if you restricted a category to a group or groups, you could only further restrict within those groups. Now you can restrict a higher level category to a group(s) while restricting content within the category to other groups. It's confusing but it makes group permission more powerful and, surprisingly, easier to set up :)

Bug Fixes

- Custom PDFs were missing content.
- Date published was a day behind in blog style categories but okay in articles.
- We put the kibosh on category inception. You were previously able to put categories inside themselves, which caused all sorts of problems. Some people did it accidentally. Some people did it to see what would happen. Either way, now you can't do it (or at least we hope so).

April 20, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- 301 redirects for private domains caused the preview in Style not to work.
- Some custom fonts were not generating properly in PDFs.
- Some merge codes were improperly displaying in PDFs.
- Exact match search was returning non-exact matches in some cases.
- Suggest API endpoint did not exactly mirror in-app search.
- Duplicate trial accounts were sometimes created, creating some login problems.
- Phantom support tickets were being generated from the login screen.

April 18, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Topic-based category type
- Topic-based authoring
- Update category types and options

Bug Fixes

- Added space after inserted links in PDFs in the middle of a sentence.

April 10, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Some records were getting duplicated in search.
- Reader login error messages were not always showing up.
- Hyperlinks don't work in PDFs, so we added the ability to display hyperlinks as full URLS so they are functional.

April 6, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Add date created to reader export
- Prepopulate standard contact form with name and email of the current author or reader
- Set from name when submitting contact form emails
- Merge code for Reader ID

Bug Fixes

- Imported readers were not getting date created set.

April 5, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- POST to ticket form with 200 returned (Customer wanted to be able to post to our widget contact form and get a status 200 back instead of the current 300 redirect)

Bug Fixes

- Article links were breaking in API calls after we made them relative. We're back to returning the full URL for API calls.
- Date published was displaying the merge code in PDFs.
- Files names with spaces were getting spaces replaced with dashes due to a previous fix for file names. Reverted to allow for spaces.
- Videos in articles were breaking PDF downloads.
- Large HTML exports were failing.

March 30, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Bulk add tags to articles in Manage
- Updated article links to generate relative links rather than populating the domain

Bug Fixes

- Apostrophes and plus symbols in file names were breaking files being displayed in the legacy editor.
- Legacy editor was having strange issues with Windows 7 IE11 (recover autosave not working and clicking hyperlinks freezing the browser). Turned out to be another tool we use, and the issue has been solved.
- Preview was sometimes displaying errors in Chrome 57.

March 27, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Import glossary terms in bulk
- Ability to set from/reply to for comment notification emails
- Remove the quick delete option for snippets so you have to confirm deletion
- Ability to restrict access to SSO while still allowing reader login

Bug Fixes

- The new editor was missing options on smaller screen sizes. Now the responsive styles show all options.
- Scrolling was buggy in Custom CSS and HTML when you have a lot content.
- Scrolling was similarly buggy in large snippets.
- Style blocks were breaking in the new editor.

March 18, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Blog style was always displaying in reverse chronological order even when other option was selected.
- Blog style category link did nothing when inside another category in the TOC.
- Some PPTX couldn't be uploaded via the editor.
- Default right column HTML wasn't display in the Custom HTML.

March 15, 2017

Last Modified on 05/29/2024 5:27 pm EDT

New Editor Updates (highlights)

- Upload images when pasting from Word
- Enhanced Word and Excel Paste plugin

Feature Requests

- Internal article titles

Bug Fixes

- Restricted article titles were displaying in the updated articles widget
- Font Awesome icons did not display in the editor.
- Paperclip icon for files didn't work nicely in Windows 10 Chrome.
- The "img-responsive" class was not being added to images that were copy/pasted or drag/dropped.

October 4, 2017

Last Modified on 07/17/2024 1:30 pm EDT

Feature Requests

- Added an optional WYSIWYG to snippet. You can now choose between the WYSIWYG and code editor inside snippets.
- Added reader group restrictions to snippets.
- Cursor is now focused inside the text area when adding article links, saving you a click!
- Added "view live article" link to webhooks
- Added support for custom version numbers.
- Homepage now has new editor and custom CSS, so it's much more WYSIWYG
- Added the ability to delete versions

Bug Fixes

- Reduced the time it takes to save an article.

October 14, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Topic articles were temporarily not working
- Pages to recommend on were not saving properly
- Forgot password link wasn't working on the login page

October 28, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Added automatic email notifications for upcoming annual renewals and failed payments

Bug Fixes

- Download to PDF wasn't working inside the widget and on widget URLs
- Fixed error when saving custom content category pages

November 4, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Added option to restrict all file library links to authenticated readers
- Added file URLs in the library to make copying a URL easier
- Added a "View Article" link to the article editor

November 6, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Added select all/none option inside Change Reader Groups
- Bulk edit status now updates date modified so you can bulk edit articles out of Needs Review
- Content list categories now display sub-categories and articles in app order

Bug Fixes

- Single password reader kbs weren't redirecting to requested articles after login.
- Secure file library URLs now work with IP and single password kbs
- Fixed an issue with autosave causing it to appear on many articles when it shouldn't

November 11, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- **Sub-categories with only 1 article or subcategory were not displaying contents in content list categories with the in-line display type**

December 2, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Security updates

- We are now disallowing TLS 1.0 and legacy cipher suites
- Configured httponly / secure flag for session and other secure cookies
- Disallowed protected subdomains to be used by customers

December 18, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Added reCAPTCHA for public contact forms

December 19, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- **Added option for reader groups to ignore SSO (ability to have KO managed reader groups while using SSO)**
- **Display date created and updated for reader groups**
- **Added webhook for newly published articles only**

December 24, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Encryption at rest!

December 27, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Added support for author SSO (ability to restrict authors to SSO authentication via a kb)
- Option to use short titles in content categories
- Ability for admins to unlock locked out readers

Bug Fixes

- User picture/icon upload not working
- Article callout expiration was defaulting to 1 week instead of 2 weeks

Misc

- New UI/UX for author/reader edit pages

December 29, 2017

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Added merge code for meta description: [template("meta-description")]
- Added article export tool to Manage

Bug Fixes

- Couldn't add authors to kbs

February 1, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Switch magic wand styles from paragraph styles to div styles
- Added the ability to create webhooks for specific categories
- Added code syntax tool to new editor

Bug Fixes

- Added gridlines when inserting a table (border by default)
- Blockquotes were purple in the editor

Misc

- Updated to new version of the new editor

February 2, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- New editor wasn't allowing JavaScript in the homepage
- Short titles in topic display categories weren't being used in the quick links
- Removed "start each article on a new page" option is PDFs (this is the default)
- Link to article search wasn't putting exact matches at top
- Fixed really bizarre Manage article bug that was only happening to one customer

February 5, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Added "barer minimum mode" (no Bootstrap CSS)
- Added date_created to suggest endpoint return in order to sort by most recent articles

Bug Fixes

- Categories were displaying twice in link to article search

February 8, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Added support for Author SSO to match on something other than email

February 20, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Added article features (PDFs, ratings, comments, and search) to topic display categories
- Added option to redirect all child articles in topic display category to the category itself

February 28, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Set up private IP for improved email deliverability
- New URL Redirect option for categories and articles

Bug Fixes

- Multiple accessibility updates to themes

March 13, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Contact form search displaying incorrect date updated

March 16, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Added norobots to PDF endpoints so search engines will not index them

March 18, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Added new classes to the reader login/logout button based on state
- Updated the new URL Redirect features name for clarify
- Added the ability for the contact form email fields to send to multiple emails using comma-separated lists
- Added reader email to reader approval notifications subject

Bug Fixes

- Quick Add categories were not getting the proper defaults
- Ampersands and dashes were being stripped from search phrases

Security Improvements

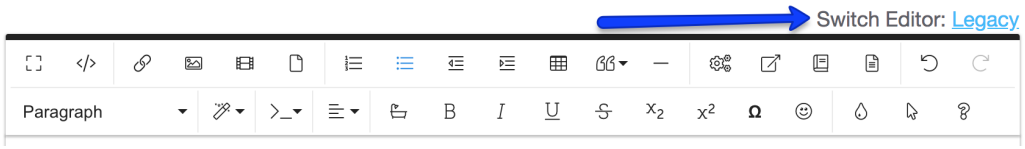
- Implemented automated monthly vulnerability scans

Article 1, 2018

Last Modified on 05/29/2024 5:27 pm EDT

General updates

- New look and feel for the applications. Mainly new colors, icons, and buttons with a few UI/UX enhancements.
- Updated the new editor to the most recent version. This includes new icons.
- We replaced the new/legacy editor callout alert at the top of the editor with a less obstructive Switch Editor option.



We're also going to start calling the new editor the modern editor, as it's not that new anymore :)

Bug Fixes

- The character counter in the bottom right of the area was overlapping content. Now it's not!

March 29, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fix

- Article tag merge codes in topic display category pages weren't rendering properly.

April 2, 2018 - Round One

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- First round of bug fixes for the new styles, including search/sort not working in the glossary, readers, or file library

April 2, 2018 - Round Two

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Second round of bug fixes for the new styles, including breadcrumb styles and browsing file library from articles
- Fixed error in preview for kb with private domains
- Fixed intermittent search issue with glossary terms

April 3, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Minor file picker fixes for new styles
- Fixed TOC caching issue in preview

April 5, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Minor style tweaks including partially hidden Add Kb button in Add Reader page and focus states for buttons when using tab
- Updated file library to force unknown file types to download so the browser doesn't try to open them (.ics, .qst, etc)

April 9, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- JavaScript was being disabled in the modern editor. If you tried to save new JS or saved an article with existing JS, it was being escaped. You can now saved it properly again!
- Toggling between the WYSIWYG and code view was adding a stray " " to image captions, causing some display issues. Should be sorted now!

April 10, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Request

- Ability to specify multiple URL redirects to an article
- New importer MadCap Flare (for internal use only - contact us if you need help importing from Flare)

April 12, 2018

Last Modified on 07/17/2024 1:29 pm EDT

Feature Requests

- Warning when creating a new reader with the same username/email

Bug Fixes

- Quotes in article titles were breaking PDFs
- Homepage preview wasn't working
- URL Redirect categories without content weren't visible to readers
- Deleted badges in Manage were blue instead of red
- Going to Your Account > Account would often switch to another kb
- New topic display categories were displaying an unnecessary warning
- Expired trials weren't able to click on anything

April 13, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Duplicate reader warning was displaying when editing existing readers and preventing updates

April 15, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Enhancements

- Simplified SAML SSO setup process (removing the separate reader mapping endpoint step)
- Added debug mode for troubleshooting SSO

April 16, 2018 Round One

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Fixed kb deletion process. Previously linked/synced articles were still displaying even if the kb was deleted. Now deleting kbs automatically unlinks content.
- Updated in-app text and links for recent SAML SSO enhancements

April 16, 2018 Round Two

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Fix for private files not consistently displaying in widget using OATH authentication

April 20, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- **Pagination for API snippets**
- **Current kb variable for API snippets**

Learn more about API calls in snippets.

April 24, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Improved mp4 video loading and playback
- Upgrade to Froala 2.8 (modern editor)

Bug Fixes

- Couldn't copy all kbs
- Keyboard shortcuts weren't working in tables
- Couldn't highlight and delete text in tables (had to backspace)

April 26, 2018

Last Modified on 07/17/2024 1:30 pm EDT

Feature Requests

- Topic articles now work across kbs
- Topic-based category PDFs now update each time one of its articles is updated
- Updated an article in a topic-based category updates the date last modified of the category
- New article merge code for version number: [article["version"]]
- Added reader ID and custom fields to reader export
- Updated "Bon Giorno" to "Buongiorno"

Bug Fixes

- Commas in titles were breaking HTML Zip Exports
- Homepage preview was showing HTML that wasn't there
- Deleting snippets wasn't working
- Navigating to the login page while being logged in wasn't redirecting you to the app
- Export articles was sometimes going to an error
- Paste as plain text wasn't working

May 7, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Microsoft Azure Active Directory Integration with KnowledgeOwl
  https://docs.microsoft.com/en-us/azure/active-directory/active-directory-saas-knowledgeowl-tutorial
- Comments permissions for custom author roles (create, approve, and delete)

Bug Fixes

- Authors with custom roles could not approve comments

May 26, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- The article parameter `inherited_roles` was not being set when creating articles in a restricted category.

May 28, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- New setting to allow the indexing of large PDFs (greater than 100 pages). Previously we were not indexing large PDFs as they would show up in most searches. This is still the default but you can override it now under Settings > Basic.

Bug Fixes

- PDFs weren't being indexed properly for search if there were more than 2 PDFs in an article.

May 24, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Happy GDPR Day!

We've updated our privacy policy to be GDPR-compliant. We've cut out legalese and used clear language.

Data Processing Addendum

If you are subject to the GDPR, you can sign our Data Processing Addendum (DPA) for compliance.

For more information, visit our KnowledgeOwl and the GDPR page in the knowledge base.

C is for Cookie

You can read more about our cookies, withdraw consent, or change consent anytime on our Cookie Declaration page.

June 21, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- The new articles widget and page were displaying articles with published dates before those without, leading to confusion.
- Sub-categories were losing their parent property in the API.
- Some articles weren't displaying in the application due to a permissions issue.

July 6, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- We removed the character limit for category and article meta-descriptions.

Bug Fixes

- Previously you could try to add multi-word synonyms even though they didn't save or work. Now there will be an alert if you try to set up a multi-word synonym.
- The inherited_roles property wasn't getting set for some shared/synced articles.

July 9, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Upgrade to Froala Version 2.8.4 (modern editor)

Bug Fixes

- Paste from Word was not properly formatting headers, bolds, italics, and hyperlinks
- Paste from Google Docs was missing headers and doing weird things to lists
- Ctrl+S / Cmd+S was not longer applying strikethrough
- Unbold wasn't working for entire paragraphs
- Shift+up and right was not highlighting and selecting the right text
- Shift+Left and Ctrl+Shift+Left were doing buggy things on Windows machines
- Backspacing the last character in the last cell of a table row was deleting the cell and jumping the cursor
- Ctrl+Z and Cmd+Z at the end of a long article was scrolling and resizing the editor
- The bathtub (Clean Formatting) wasn't functioning properly

July 12, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Added more validation to contact form to further prevent empty submissions

Bug Fixes

- Export articles to CSV wasn't working with some filters
- Old images were appearing broken in the library
- Editor was adding extra   to image captions when toggling between code view
- Widget reader_groups parameter wasn't working properly

July 16, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Zendesk app was not properly encoding HTML when creating new articles.
- Created a support tool to clean up article links on deleted content.

July 21, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Added back the ability to have capital letters and periods in permalink redirect URLs.
- Added a new landing page for deleted/cancelled/non-existent knowledge base URLs.

Bug Fixes

- Articles with hidden from search displayed in related articles
- Fixed an issue with remote suggest and reader group restrictions
- Images weren't caching properly

July 22, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Added the ability to sign for a trial and subscribe to the Business plan.

July 31, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Files not caching properly (testing a change)

August 3, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Hopeful fix for file caching issues

August 6, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Auto-assign groups by email was being buggy
- Search phrases were exporting as array instead of a comma-separated list
- Searches with no results was displaying partial searches. If searching via the API suggest endpoint, add the parameter "&trackResults=false" to exclude partial searches. The widget will not include partial searches by default.

Search updates

Last Modified on 05/29/2024 5:28 pm EDT

We have all new search documentation to go with our all new smarter search!

- **Overall search improvements**
  - Smarter search engine, powered by Elasticsearch
  - Ability to customize the search weights and scoring
  - Multi-word synonyms
  - Support for non-English search
    - **Available search languages:** Arabic, Armenian, Basque, Brazilian, Bulgarian, Catalan, Chinese, Czech, Danish, Dutch, **English (default)**, Finnish, French, Galician, German, Greek, Hindi, Hungarian, Indonesian, Irish, Italian, Japanese, Korean, Kurdish, Norwegian, Persian, Portuguese, Romanian, Russian, Spanish, Swedish, Turkish, and Thai.
  - Meta descriptions and permalinks are now searchable
  - Fuzzy searches aka typo tolerance
  - Updated suggest endpoint for the API that allows for custom search weights, autosuggest/partial search (search as you type), advanced filters, sorting, and pagination
- **Full text search improvements**
  - View all search results (more than 20!) using pagination
  - Ability to sort by relevance, popularity, last updated, and newest
  - Dynamic search blurbs with highlighted search terms
- Autosuggest **search improvements**
  - Now searches search phrases, permalinks, and meta descriptions in addition to title
  - Now includes topic and custom content categories
  - No longer case/accent sensitive (searches with and without accents lead to the same results)
  - Highlighting what's different in the suggestions to help people find what they want
  - Added "hit enter to search" at bottom of suggestion list

Bug Fixes

- Special/foreign characters no longer break autosuggest search results
- Tag searches (:tag name) no longer appear in searches with no results report

November 9, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Added the ability to include and require reader custom fields 1-5 on the reader signup form

Bug Fixes

- Removed the silly placeholder text from the signup form

November 12, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Some contact forms weren't suggesting articles (no search results).
- Some in-app searches weren't showing restricted articles.
- Some authors couldn't see restricted content in the app.

November 15, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Fuzzy autosuggest
- Add search weights to autosuggest
- Disable autosuggest
- Use meta descriptions / default article blurbs instead of highlighted fragments

Bug Fixes

- Fuzziness was being a too fuzzy in full-text search. Algorithms have been adjusted.
- Large PDFs were causing reindex problems. It's a background process now.
- Restricted articles weren't displaying in search testing. They are now.
- Fixed a loophole where similar snippet merge codes were matching the wrong one.

November 18, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Added support for reader created via the REST API: Reader Endpoint

November 28, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Import content using multiple languages from Zendesk (contact support for more information)

Bug Fixes

- Article Review time unit length was not letting you choose "years"
- Reader emails with apostrophes in them were not allowing password reset emails to be sent

December 3, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Using "/" characters in article and category titles were excluding them from HTML export zips.

Maintenance

- Removed the "Advanced Image Editor" option for images from the modern article editor — Adobe discontinued support for Aviary



We are working on a replacement for the Aviary image editor which should be available with the next update to the editor.

December 31st, 2018

Last Modified on 05/29/2024 5:27 pm EDT

Bug fixes:

- Code block was not showing as an option in the modern article editor on smaller screens
- Added auto-highlighting glossary term support for text inside of , , and <u> HTML elements

January 22nd, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Bug fixes:

- Prevent glossary terms with empty values from being created
- Auto-highlight glossary terms was having an issue if the text that contained the term started with a < symbol
- Copied knowledge bases were not being properly indexed for search until a reindex was performed
- Improved protection against categories being moved into one of their own sub-categories
- Deleting a category from the category editor screen was not triggering a deletion of all sub-content
- Readers were not able to update their icon when leaving a comment
- Trying to create a new reader group via the API was throwing an error

January 29th, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Bug fixes:

- In the embeddable widget, if the end-user opened an article and then navigated to a different article, the "Open in Full Site" link was not updating to the new article.
- Google logins for both the application and the reader login page were using now deprecated Google+ endpoints. We have now switched to the Google Sign-In endpoints to prevent any service interruption.

Introducing Subscriptions

Last Modified on 05/29/2024 5:27 pm EDT

You can now allow your readers to subscribe to categories. Subscribers will receive email notifications for new and updated articles.

Learn more about it by reading our subscription documentation.

February 8, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Features

- Added public subscriptions option to the (beta) reader subscriptions feature

Bug fixes

- Searching in manage was limiting results to a max of 500
- Embedded widget was throwing a JS error in some circumstances

February 22, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Features

- Subscriptions full release, coming out of beta
- Added 2 new article merge codes:
  - 59433863ec161ccd2c9e63d0 — returns direct parent category's ID
  - 59433863ec161ccd2c9e63d0 — returns all parent category IDs in comma separated list

Bug fixes

- SCAYT was no longer working in the legacy article editor
- Updating widget settings in app was not cache busting the widget JS properly
- Widget contact form file upload was defaulting to show the standard browser full path, updated to now only show file name

February 26, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Links to knowledge base articles were not rendering correctly within HTML exports
- In some cases, reader subscriptions to sub-categories were not showing updated / new articles correctly in the outgoing emails
- Using the merge code in a content type category was causing the category title to show twice
- "Recommend on Pages" was not saving correctly for categories

March 4, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Brand new knowledge bases that never had basic settings changes were throwing an error when readers tried to subscribe to a category

March 9, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Features / Enhancements

- Added support for "muted" and "playsinline" HTML attributes in the modern article editor. These can be used to make webm videos display much like a gif image does
- Added an option to turn off fuzzy searching in search settings. This is generally only recommended if your readers are searching for things like version or product numbers

Bug Fixes

- Subscribe to category button was not appearing within blog type categories

March 11, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Features / Enhancements

- Added support for unauthenticated SMTP servers to be able to send reader subscription emails
- Added a new article merge code to populate the full URL to the current article -- https://support.knowledgeowl.com/help/march-11-2019

Bug Fixes

- Autosuggest search was not working
- Larger file uploads were sometimes being corrupted when uploaded to the file library

March 12, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Error pages in the widget (Article not Found, No access) were not inheriting the knowledge base styles
- Reader group restrictions were not working correctly in some circumstances within the widget when the "Exclusive" reader group logic setting was in use

March 18, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- URL redirect articles were not redirecting correctly within the widget

March 23, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Improved the search feedback in the widget while people type when there aren't any results

March 28, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- When changing the status of article in bulk via Manage, webhooks were not being triggered
- In some circumstances when changes were made to article settings, those settings were not being updated in the search index

April 2, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- After searching for an article in the widget and opening it, the "Open in Full Site" URL was sometimes malformed and would result in an article not found error

April 5, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Feature Improvements

- Added two new API snippet merge codes: %cur_top_cat_id%, %cur_parent_cat_ids%
  These merge codes return the top level category ID and an array of all parent category IDs respectively

Bug Fixes

- In some cases, new articles were not properly inheriting reader groups from their parent categories

April 10, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Enhancements

- All new knowledge bases will now have the "Force SSL" option enabled by default
- When creating a copy of a knowledge base, a warning message with more information will be presented if the "Create a synced copy" option is checked

Bug Fixes

- Table cells were not being highlighted when selected in the modern editor
- Articles marked as "Exclude from search results" weren't being properly excluded from suggested articles on the contact form page
- Prevent script injections on embedable widget JSONP callback functions
- Going directly to the URL of an article version after that version had been published was not displaying properly
- Searches for tags was handling case sensitivity incorrectly
- Some KB searches were being weighted incorrectly based on capitalization
- Zendesk contact form submission details were not being encoded correctly

April 15, 2019

Last Modified on 05/29/2024 5:27 pm EDT

UI Improvements:

- When deleting an article or category from the Articles page, we will now display the name of what you are deleting in the confirmation message
- When deleting multiple files from the file library, we will now display a list of each of the files that are selected for deletion in the confirmation message
- When copying a knowledge base, we have added messaging to be more clear about what the "Sync all content from original" option does and added an additional warning
- Added a message to the copying knowledge base progress page to alert customers that indexing the new content for search could take several hours for large knowledge bases

Bug Fixes:

- URL redirect articles marked as open in new tab were not opening in a new tab when clicked on from within a blog type category
- URL redirect articles were not redirecting correctly when clicked on from the popular articles list inside of the widget
- Article revisions were missing the first edit and only recording once the second edit was made to the article
- In article CSV exports, the publishing status was not accurately reflecting the "Needs Review" status for articles that were automatically set to that status after the set amount of inactivity
- Toggling on/off the setting to require authentication for viewing files from the library was not updating the knowledge base logo correctly

April 16, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- When 2 topic categories were in sync and one of the topic articles was updated in the child topic category, the parent topic category was not updated until it was re-saved. Confused? So were we.

April 18, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- URL redirect articles were not displaying correctly within default type categories that had the display in-line option chosen
- When KO authors who are restricted to reader groups logged in through a knowledge base reader login page instead of the app login page, they were not getting assigned the correct reader groups

April 25, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Feature Enhancements

- Added more graceful handling of displaying categories in the modern widget. We will display the category contents within the widget itself if we can. If we can't, we provide a link to allow the end-user to open the category in a new tab.
- We now allow restricted articles to be searched for and added to the Reporting → Widget → Recommended Article Weights page
- Added a new function to the Modern Slideout widget that will open the widget directly to the contact form. The new function is __ko16.openContactForm();

May 6, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Feature Enhancements

- When a new article is added as recommended via Reporting → Widget → Recommended Article Weights → Add Article, the page will now automatically appear in the article's "Recommend On Pages" in the article editor
- When editing an article, hyperlinks to other articles can now be tested within the editor and within the article preview
- Filtering the file library by tags will now automatically update the list of matching files without needing to close the tag filter select area

Bug Fixes

- We are no longer allowing authors to be created without access to any knowledge bases
- Some searches from within the embeddable widget were not learning from end-user behavior
- When using "Regex Replace URLs" in the widget, the {custom} mergecode was not working when the URL did not end in a slash
- Upgrading from a trial account to a paid account using a credit card that gets declined was causing an unintended error screen

May 13, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Feature Enhancements

- Added support for SVG image markup in the modern article editor

Bug Fixes

- PUT API calls to the /reader endpoint were failing if the reader's email address was not included in the call
- When editing a non-published version of an article, autosave was not correctly being associated with the version and was instead being associated with the published version of the article
- Underscores were not being properly removed from subdomains when creating or copying a knowledge base
- Knowledge bases that were set to use meta descriptions as the article blurbs were not correctly showing the blurb when the article was hard linked to another article. That's super clear right?

June 3, 2019

Last Modified on 05/29/2024 5:28 pm EDT

Feature Enhancements

- When bulk importing readers from a CSV, you now have the option to skip or update readers that already exist
- If there are duplicates within the bulk reader import CSV itself, we will throw a warning ask if you want to continue the import. If you do, we will only use the first instance of the reader listed in the CSV.

Bug Fixes

- Larger file uploads that were uploaded using the legacy article editor's "Add Image / File" were sometimes corrupted
- When editing auto-assign reader group by email rules, the saved settings were not appearing correctly

June 5, 2019

Last Modified on 05/29/2024 5:28 pm EDT

Feature Enhancements

- Deleting your search in the widget will now clear search results
- Added "Recommend On Pages" option to categories so that categories can be used as a suggested resource in the widget

Bug Fixes

- In certain instances searching for an article in the widget, opening it to view, and then trying to use the "Open in Full Site" link was causing errors

May 15, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Feature Enhancements

- Added a "Backup From Email" field for the contact form. This was added for when "Use reader's email address as sender" is being used and the email fails due to a DMARC policy or something similar. Failed emails will be resent using the backup email address.

June 19, 2019

Last Modified on 05/29/2024 5:28 pm EDT

Bug Fixes:

- When linking to an article from within another article, https://app.knowledgeowl.com/kb/article/id/..... was sometimes being added to the beginning of the article mergecode
- Updating an article that is the child shared content article for a category synced article was updating fields on the children of the category synced article that it shouldn't have been. This is harder to explain than it was to fix.

June 20, 2019

Last Modified on 05/29/2024 5:28 pm EDT

Feature Enhancements:

- When deleting a knowledge base, we will now display the name of the knowledge base you are trying to delete in the confirmation message

Bug Fixes:

- The FontAwesome URL for KBs will now always specify HTTPS as the HTTP URL redirects to HTTPS automatically anyway
- Unpublished article versions using "Make Visible to Reader Groups" that had no reader groups selected were accessible to anyone assigned to a reader group
- Although the file library was not accepting files larger than 200MB, there was no error message or feedback displayed when trying to upload a file that exceeds that size

July 12, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Feature Enhancements:

- Improved screen reader accessibility for all form inputs in live knowledge bases

June 28, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes:

- In certain cases, trying to add labels to files in bulk was not correctly applying the labels

July 31, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Feature Enhancements

- Changing the category an article belongs to from within the article editor now allows you to search for categories that are only 2 letters long as opposed to the previous limit of 3 letters or more
- All newly created accounts will now default to the reader setting of self-administered passwords instead of admin administered

Bug Fixes

- When editing a custom content category, clicking "Open Link" on a link to another article or category will no longer cause an error
- Creating a category using Quick Add or via the API will no longer result in null fields and will mirror the field values that would be created after doing a full save in the application. (This issue was only visible when viewing the category via the API)
- Publishing a version of an article that was using the "Make public to groups" setting was not correctly removing that setting once the version went live
- In the modern article editor, using the replace image from library was not allowing you to delete any search terms
- In Chrome browsers, selecting a font pair in Settings > Style was only updating the header font and not the body
- Re-indexing a knowledge base for search in certain circumstances would appear to finish before the index was actually completed
- A legacy search tool was still displaying the old "Did you mean..." English dictionary suggestion when the full search returned less than 3 results. This has been removed from the search results pages.

Introducing Version Notes

Last Modified on 05/29/2024 5:27 pm EDT

Version Notes are now available for all published articles and versions!

Version Notes give you a new internal article field that your readers will never see.

How to use Version Notes

Use Version Notes to:

- Add notes about what you've updated or changed
- Provide editorial feedback
- Leave yourself notes or to-do items

Learn more

Learn more about it by checking out our Version Notes documentation.

September 12, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Feature Enhancements:

- Added a checkbox to the CSV export dropdown in manage to select / de-select all columns
- Added the ability to disable comments and feedback for custom content categories

Bug Fixes:

- In Manage > Bulk Edit, selecting a reader group was not unchecking the "Keep Current Restrictions" checkbox
- Typahead searches were not respecting the "refine searches by category" dropdown
- Authors that were not allowed to create to article tags were seeing an erroneous error message when editing a version of an article
- Our slideout help widget in the KO application was not working on the PDF settings page
- Clicking on "Update Credit Card" in account settings and closing it without actually updating the card was preventing further action on the page
- Deleting an author team was not previously removing that author team restriction from all articles / categories that belonged to it
- Using a snippet merge code in the title of a new article / category was including part of the merge code in the auto generated permalinks
- Certain characters used in article tags were causing Javascript errors within the application
- Topic categories were not recognizing "Old Links" that contained only numbers
- Fixed a typo on the Settings > Subscriptions page

October 3, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- In certain rare cases, content categories were rendering incorrect information in full PDF and custom PDF downloads
- Certain canonical links that had query strings were not being properly encoded and were causing incorrect 404 errors

October 23, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Features

- New embeddable version of the help widget - Widget 2.0 Beta released
  - Official announcement will come after first round of testing and verification

November 5, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Setting certain article fields to 'false' via the API were not being handled correctly

November 8, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Navigating to a category from the "Recommended Page Report" in the widget reporting section of the application was not taking authors to the correct place
- In the Widget 2.0 beta, there was no way to customize the thank you text after end-users submitted a contact form request
- Updating an article's permalink after it was published was not correctly updating the link returned by the auto-suggest search in the knowledge base
- Deleting a reader group will now ensure that group is removed from all authors, readers, categories, articles that were assigned to it
- In certain cases, using a numeric ID as the SSOID to log readers in via SAML was causing duplicate readers to be created
- Knowledge bases using the modern theme were allowing readers on mobile devices to slide the table of contents out using touch. This functionality has been removed to prevent issues / confusion
- An endpoint that was previously used for the modern widget embed was allowing unintended redirects. This has been removed for security purposes
- The reader password reset option was case sensitive which caused false errors of "Unable to find a reader with that email address". All password resets moving forward will treat the email as case insensitive

Widget 2.0

Last Modified on 05/29/2024 5:27 pm EDT

We're excited to announce the beta release of our new embeddable web widget: **Widget 2.0**

Embed your knowledge base in your company website, intranet, ticketing portal, or application.

New Features, New Look

Widget 2.0 has a new look and feel and an updated feature set, including:

- Tabbed layout and updated styles for a cleaner look
- Full knowledge base navigation
- Expanding breadcrumbs
- Full in-widget display of all category types
- Automatic "Open in full site" and "Scroll to top" links in footer
- In-widget contact form search to encourage self-serve
- Better in-widget cues for Quick Search vs. Full Search

Easier Setup

Widget 2.0 is easier to configure, with:

- In-app settings to change all text labels and headers
- New methods for developers to better control widget behavior
- Both OAuth2 and JWT authentication now supported

Better Documentation

Take a look at our updated documentation to see what you can do with the new widget!

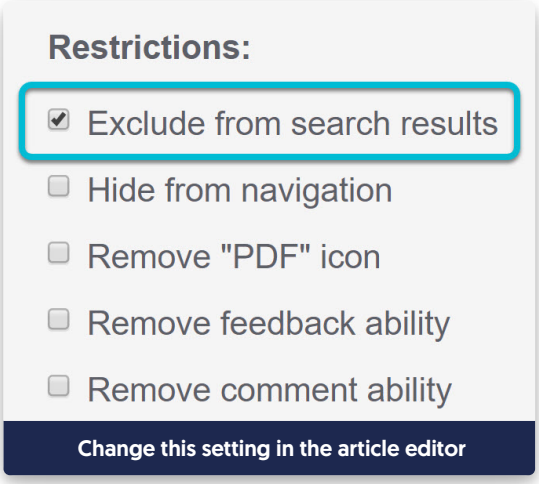
https://support.knowledgeowl.com/help/widget-20

November 22, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Previously, for publicly-available content, selecting the "Exclude from search results" option for content would remove it from search within KnowledgeOwl but might still lead to Google search indexing it. Selecting that option now adds a `<meta name="robots" content="no index">` tag to the header for the article, preventing search engines from indexing it.

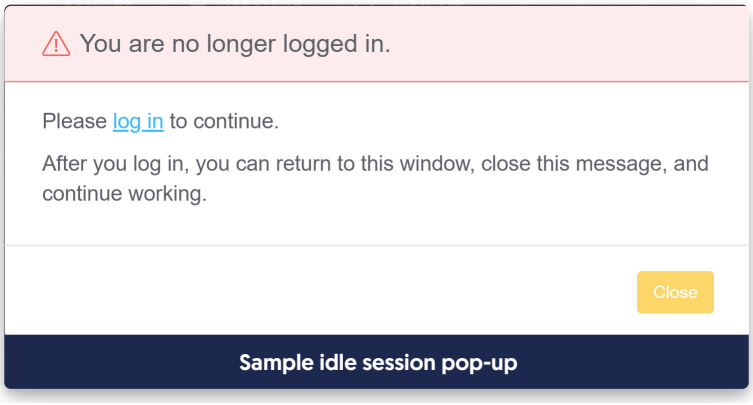


Note: if any of your excluded-from-search content is already indexed by search engines, you'll need to request a recrawl of your site for them to respect this change.

- For advanced authors/developers: we've added an object-id merge code so you can pull the ID of an article or category that's currently being viewed.

Bug Fixes

- Administrative authors accessing app.knowledgeowl.com will now see a warning if your session has logged out due to inactivity or logging out in a separate tab. The warning will prompt you to log back in in a separate window so that you can log back in without losing any work.



- In PDFs, hyperlinks appearing at the end of a paragraph or list item were sometimes showing HTML tags or truncated content. Hyperlinks at the end of paragraphs and list items now behave like proper hyperlinks. Resaving an affected article with a small change will regenerate the PDF to use the fix, but if you think a lot of your PDFs were impacted, contact us to request a bulk regeneration of all PDFs.
- Numeric permalinks beginning with 0 weren't working properly. Now they are.

December 10, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- We updated logic on a handful of pages to alphabetize lists in app.knowledgeowl.com, including:
  - Author dropdowns and lists are now sorted alphabetically by first name, last name on these pages:
    - In edit mode for an article, in the Author dropdown
    - In **Knowledge Base > Manage**, when creating or editing a filter
  - Lists of knowledge bases are now sorted alphabetically by name in a few different places. This is a case-sensitive sort, so knowledge bases beginning with uppercase letters are sorted first, followed by knowledge bases beginning with lowercase letters. This impacts:
    - Clicking the + KB Access button when editing an author in **Your Account > Authors**
    - Clicking the + Add KB button when editing a reader in **Your Account > Readers**
    - The knowledge base selector when creating or editing a webhook in **Your Account > Webhooks**
    - The SAML password knowledge base selector when editing an author in **Your Account > Authors**
  - Author Roles are now consistently sorted alphabetically, with the built-in Writer and Editor roles at the top and all custom roles displayed beneath these alphabetically on these pages:
    - In **Your Account > Authors > Custom Roles**
    - In **Your Account > Authors > Edit** an individual author, when creating or updating the role assigned as part of knowledge base access

Bug Fixes

- Some authors were getting a "missing __accountid" error when trying to create tags using the API. We've resolved this issue so the __accountid field is being properly set.
- When using the Modern Widget on iPads and iPhones, scrolling the widget was scrolling the main window rather than the widget. We released a fix so that the widget properly scrolls now.

December 11, 2019

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

- Customers using the Minimalist theme can now change the width of the slideout Table of Contents.

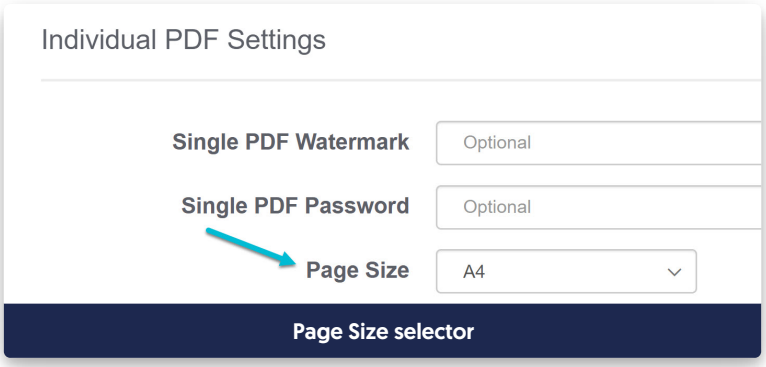
December 31, 2019

Last Modified on 05/29/2024 5:27 pm EDT

As you might be doing, we made an effort to tidy up around KO to finish out 2019, so we released a few small changes that had been in our to-do list. We hope they make the start of 2020 a bit more hopeful for you.

Feature Requests

- For PDFs (individual articles, Standard full KB export, and Custom PDF Export), you can now switch between A4 and US Letter paper sizes as page sizes for PDF generation. You'll see a Page Size dropdown in each PDF configuration screen (Settings > PDF for individual article PDFs; Knowledge Base > Exports > Standard PDF for the full knowledge base PDF export; and Knowledge Base > Exports > Custom PDF for specific individual custom PDFs).



Page Size selector

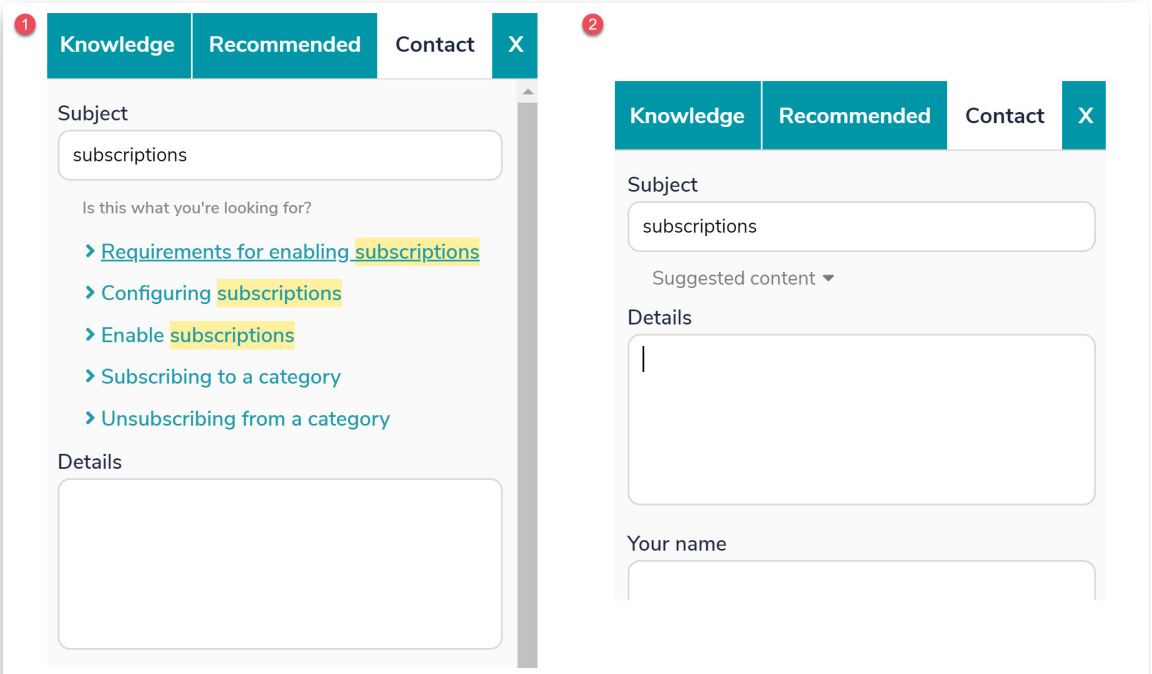
Bug Fixes

- For knowledge bases with a mixture of public + private content, the autosuggest search was sometimes showing private/restricted content to public readers. (They still couldn't open the content, but the titles showed in autosuggest.) We fixed this so that public readers won't see any restricted content in Autosuggest search.
- In **Knowledge Base > Manage**, the **Date Deleted** field wasn't always being set when an article was deleted. We've fixed this bug so that field is always populated regardless of what method you use for deleting an article. (Please note: if you delete an article and then later change its status back to draft or published, that Date Deleted field will still contain the original deletion date, so you know it was previously deleted. If you delete it again, the Date Deleted field will update with the most recent date of deletion.)
- The search results sorts (Relevancy, Popularity, Last Updated, Newest) weren't sorting **tag searches**. We've updated this so the sorts now work with tag search results.
- If you were accessing **Knowledge Base > Manage** as an author assigned to specific reader groups and the knowledge base was set to automatically flag articles untouched for xx months as "Needs Review", the built-in "Published" status filter was returning all articles. We fixed this so now the reader group logic doesn't interfere with the publishing status filters.
- The API `/suggest` endpoint wasn't properly handling complex `$and` filters. It does now.

Widget 2.0 Updates

We're drawing quite close to a full stable release of Widget 2.0, but since these are adjustments to a beta release, we wanted to split them out into a separate section:

- **Contact form/tab improvement:** the searches completed in the Subject of the widget 2.0 Contact Form were showing individually, letter-by-letter, in the Reporting Dashboard report for searches with zero results. Since this search only uses an autosuggest search as you type, we excluded it entirely from that reporting. You can still use the Widget reporting to see self-serves vs. tickets submitted.
- **Contact form/tab improvement:** When a reader searches in the Contact tab, the widget will auto-suggest up to five related articles. In our initial release, there was no way to collapse these results and the tab behavior didn't make it clear you were cycling through that list. Once you shifted to the Details section, the suggested articles disappeared and the only way to retrieve them was to re-search the Subject. We found this experience a bit clunky, so we've adjusted the behavior here. Now:
  - Hitting Tab after the Subject takes you into the Details and collapses the suggested articles list
  - Clicking into the Details section will also collapse the suggested articles list
  - When the suggested articles are collapsed, there's always an arrow control present to expand them, so you don't need to re-search. The text label with this control can be edited using the Expand Suggested Resources option in **Settings > Widget**.



Widget 2.0 Contact tab with initial suggested search results and collapsed results once the cursor is in the Details section

- **Housekeeping:** The logic for the widget was previously loaded into ko.src using `/widget-app/assets/js/load.js` but when we made our first tweak to the logic here, we noticed that the cache wasn't automatically updating. This meant that some end-users had to manually refresh to pull in the updates to the widget logic. Since the widget is often exposed to our customers' customers, we wanted to streamline this so that future changes to the widget would happen seamlessly. We've moved that Javascript file so it's called from the load method. Embed codes still referencing the .js file will still work, but feel free to go copy the new embed code and replace your existing Widget 2.0 installations with the new ko.src call.
- **In-progress:** We've been working on creating the Widget 2.0 methods for Using the Widget on Single Page Applications. These are close to being live, and are the last major feature parity required for our stable release of Widget 2.0--an announcement on these new methods should be coming in early January 2020.

January 9, 2020

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- Tag searches (searches using the ":" to search tags rather than text) were only returning one page of search results. Now you'll have the same type of pagination with tag results as you have for full text search results.

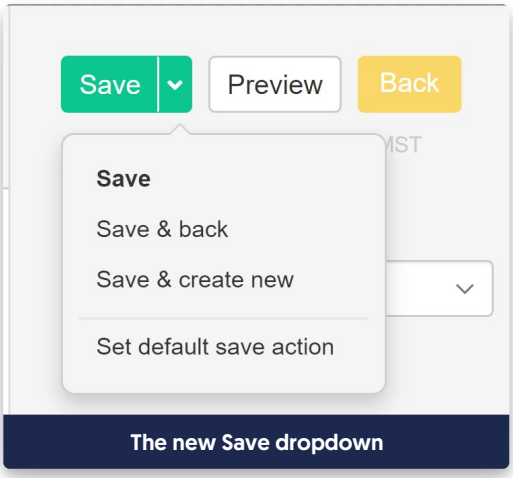
January 17, 2020

Last Modified on 05/29/2024 5:27 pm EDT

Feature Requests

New Save options

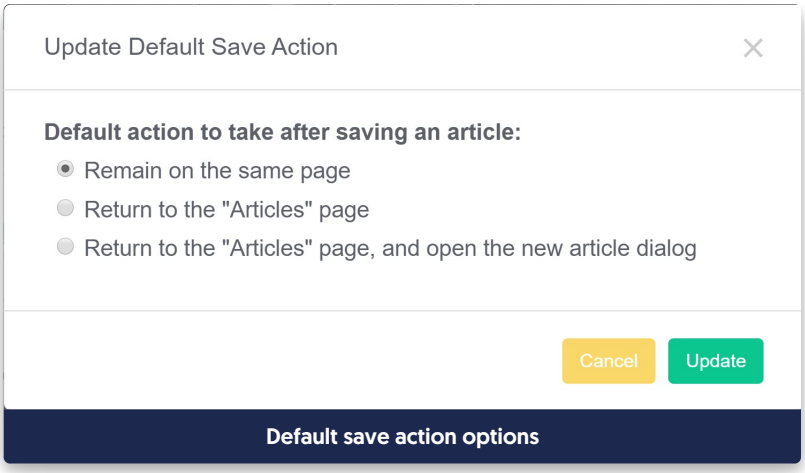
You've likely noticed this already, but we've updated the **Save** button in the editor so that it gives you a few different options now!



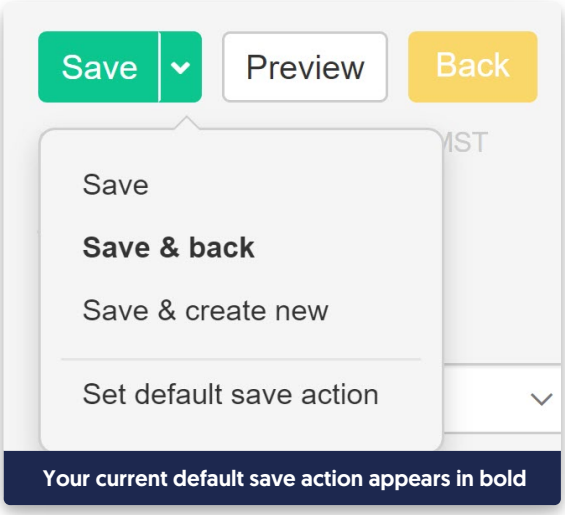
The new Save dropdown

Here's a rundown on the new options:

- **Save:** The same Save option you're familiar with, this saves what's in the editor and keeps you on the same page.
- **Save & back:** This option will save what's in the editor and will then navigate you back to the Articles interface, with the category you were currently in opened.
  Example: if I click Save & back on this release note, it will:
  - Save the release note article I'm currently editing
  - Take me back to the Articles interface with the Release notes category open in the righthand pane
- **Save & create new:** This option will save what's in the editor and will then navigate you back to the Articles interface with the "create new article" pop-up already opened. Creating a new article from this pop-up will create the article in the category you were currently working in.
  Example: if I click Save & create new on this release note, it will:
  - Save the release note article I'm currently editing
  - Take me back to the Articles interface
  - Open the Create new article pop-up from within the Release notes category
  - Once I choose how to create my new article and give it a title, the article will be created in the Release notes category and I can start editing it
- **Set default save action:** This option lets you set what just clicking the "Save" button does by default:



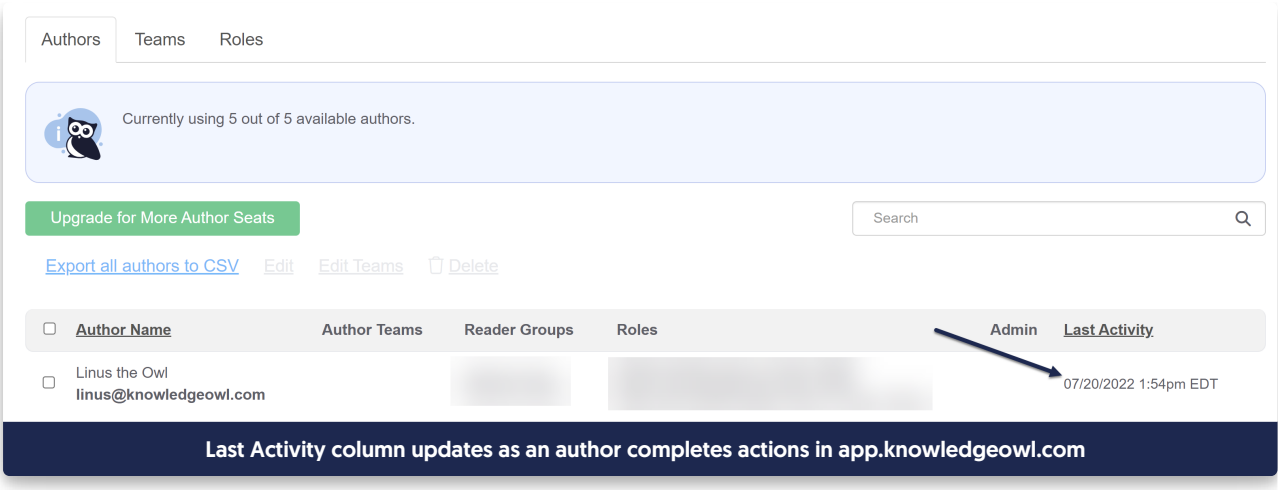
Once you've selected one of the default actions, clicking the **Save** button will automatically do that default action. You can see what you have currently selected as the default by clicking the dropdown; the current default is set in bold:



With no default selected, regular save (and remain on the same page) is used.

More detailed author activity logging

In **Your Account > Authors**, the final column showed authors' **Last Login**. We received feedback from several customers that they were trying to use this field for auditing activity in the knowledge base, and in some cases where SAML login for authors was in place, this last login date wasn't updating. We've updated the interface here to show the **Last Activity** of a given author, which will update as an author performs actions in app.knowledgeowl.com, regardless of the login type. We hope this makes the Authors interface a bit more useful for auditing usage activity.



Bug Fixes

- In **Your Account > Authors**, customers who were using SAML logins for authors or whose authors were using the "Keep me logged in" option weren't always seeing an updated Last Login date. As noted above, we learned that customers cared more about when an author had last been active rather than logged in, so we switched this to Last Activity instead, which also fixes the bugs with the login type/keep me logged in causing the date to not always update.
- When creating a new knowledge base by copying an existing one, sometimes Topic Display categories ended up displaying oddly. We fixed this so they should display properly when created from a copy.

January 22, 2020

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- **Manage exports:** In **Knowledge Base > Manage**, filters that returned a huge number of articles (over 19,000) sorted by Article Name were not successfully generating CSV exports. (Sorts on other fields, like the dates, were generating properly.) We added a better sorting mechanism to the Manage export generation and these CSV exports are properly generating now.

January 29, 2020

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- **Widget 2.0 and Internet Explorer:** Widget 2.0 is now compatible with Internet Explorer 11. (So those of you using app.knowledgeowl.com from within Internet Explorer, the Help navigation link now properly opens the widget!)
- **Version notes disappearing:** When the current active version had version notes and a new version was created, the existing version's notes seemed to disappear. We updated this behavior to ensure that the version notes are always tied to the article version, regardless of whether it's active or not.
- **Manage deletions:** Deleting an article through Manage > Delete wasn't always removing the article from the built-in Homepage New articles and Updated articles widgets, though other delete methods seemed to properly remove it. We've updated that delete function so the articles should be properly removed from the homepage widgets, regardless of how they were deleted.
- **Manage Deleted filter + search:** In Manage, when the Deleted filter was selected, searches were returning no results. We've updated the filter + search logic here so that the Deleted filter search works like the other filters.
- **Manage > Custom date filters using today's date:** In Manage custom filters with custom date ranges, selecting the current date as the end date only included articles UP TO today (e.g. things created today wouldn't show, but things created yesterday would). We updated the logic here so that it is an inclusive date ending at midnight, so if I set a filter with 29 January 2020 as the end date for the Date Created, and I created an article on this date, it would show.
- **Manage > Custom date filters as an author in reader groups:** In Manage custom filters, authors who were restricted to 1+ reader groups could not properly filter on custom date ranges--the filter would bypass the custom date range entirely. We've updated this so that all authors--those with and without reader groups--can use custom date filters.
- **Articles top-level article deletions:** Articles that had been in subcategories and were then dragged to the top-level of content could not be deleted using the trashcan. Now, they can (as they should be!).
- **Login page > password reset:** On the login page for app.knowledgeowl.com, the password reset email field was case-sensitive. This didn't match the rest of app.knowledgeowl.com login (which is case insensitive), so we updated it to match.

January 30, 2020

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- **Knowledge base icons:** We had reports from a couple customers of occasional, intermittent missing icons in their knowledge bases. We load all default knowledge base icons through FontAwesome. Previously, we'd been using a CDN to load those. We've now moved the FontAwesome stylesheet directly into KnowledgeOwl to cut down on any potential delays in icons loading.

February 4, 2020

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- **app.knowledgeowl.com login:** If you don't enter a username or password, the screen now throws a warning that you need to do so.
- **Import content:** We rolled out new custom role permissions a few weeks ago, including splitting out the ability to import content as a separate setting. Since that change, the Knowledge Base > Import screen has had an odd layout for Editors only. We updated the layout so it looked the way it should.

February 5, 2020

Last Modified on 05/29/2024 5:27 pm EDT

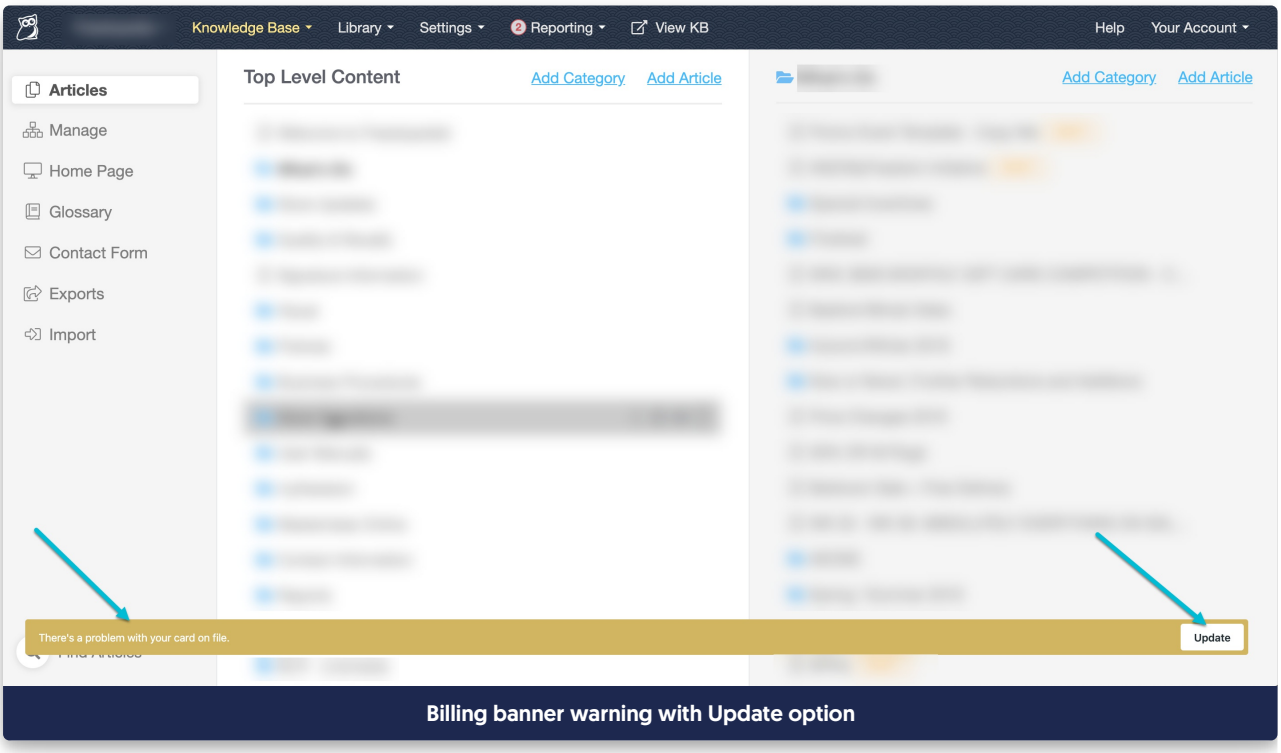
The team's been moving right along trying to make a number of small fixes and improvements in February. (It's a short month, so we're trying to be sure we make the most of it.) Here are a few more goodies we released last night:

Feature Requests

More transparency about credit card billing issues

We just released a new billing widget that will alert KO authors if we were unable to process their credit card. This change applies to customers who are paying in-app using a credit card **only**. Invoiced customers won't see this change.

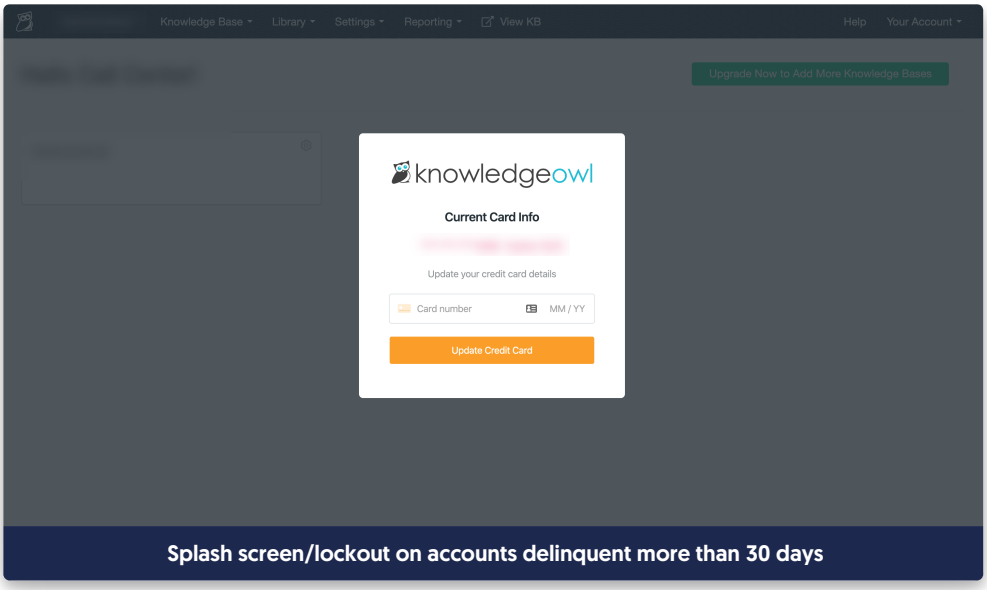
All authors will see a banner if there is a problem with the card:



Billing banner warning with Update option

All authors can then update the credit card without being an admin by clicking the Update button in the screenshot above.

From the date of the initial issue, you'll have 30 days to resolve it. Once that 30-day grace period is up, you'll see this splash screen when you log in. You won't be able to use app.knowledgeowl.com until you fix the credit card billing info:



Splash screen/lockout on accounts delinquent more than 30 days

We hope that this helps customers identify and resolve credit card billing issues faster without having to wait for an email from us or lots of legwork to identify the full admin contact to update the credit card info. Contact us and let us know what you think!

Bug Fixes

- **Article editor videos with secure file storage:** For customers requiring authentication to view files, the Insert Video option was adding an extra https: at the front of videos added from your file library. This made the videos not load properly. We've removed the extra https:.
- **Article editor files added from library missing paperclip:** Thanks to the eagle eyes of one customer, we learned that Upload File > Add File from Library was creating links without the file paperclip, whereas newly uploaded files were. We updated this so that adding a file from the library, as with a new file upload, adds the paperclip to that upload:
- **Bad [[hg-id]] links:** When Link to Article is used to add links to other articles, an **[[hg-id]]** link is used. When that link is edited in a way that it no longer works, it was causing the reader view of the article to not load at all. We fixed this so that the link itself just doesn't lead anywhere but the rest of the article will display properly.
- **Expanded Save options:** For authors restricted to specific author teams, the new expanded Save button option wasn't fully disabled when an author was viewing content they couldn't edit. We updated this so the expanded Save options are governed by the same permissions as other editing options.
- **Manage filters "with quotes":** Manage filters created with "quotes" in the title were causing some troubles in the Manage interface. Once created, the filters could not be properly edited or deleted. We updated the logic here so you can still use quotes but those filters behave just like other filters--editable and deletable.
- **Subscriptions and Topic Display categories:** In public knowledge bases with private domains and public subscriptions enabled, Topic Display categories with the [] merge code in them weren't subscribe-able. The reCAPTCHA used for the subscriptions wasn't properly validating. We added some scoping to reCAPTCHA so it submits for the box/form you're actually looking at.
- **Subscriptions + Restrict by IP address + Contact form:** In knowledge bases restricted to a shared IP address with public subscriptions enabled, the readers could not submit the Contact Form. As with the previous bug, the reCAPTCHA for the contact form was getting confused with the reCAPTCHA for subscriptions. We added some scoping to reCAPTCHA so it submits for the box/form you're actually looking at.
- ~~**KnowledgeOwl URLs with trailing slashes:** One of our customers went through an SEO audit and noted that search engines had indexed some KO URLs with a trailing slash, e.g.~~

~~https://support.knowledgeowl.com/help/ instead of https://support.knowledgeowl.com/help . This has potential SEO consequences, because search crawlers treat each page (with/without the slash) as separate pages, so you can get dinged for having duplicate content and the search power results get divided between the two pages. We've forced all URLs to not have the trailing slash and have also set things up so if someone does hit a URL with a trailing slash from a previous index, etc., they will be 301-redirected to the URL without the trailing slash. This should help customers keep better SEO in place.~~ -- this change was rolled back on February 6th

February 6, 2020

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

It's not often I have to say this, but: yesterday we released some SEO changes designed to remove trailing slashes from URLs that did not go well. First, we noticed some issues with search. Then, we discovered that a couple customers' custom haproxy redirects stopped working properly, causing some navigation and access issues within their knowledge bases.

Today we totally rolled back that trailing slash change. We're evaluating other ways to implement the same end behavior without impacting search behavior or custom redirects.

Mainly I am sharing this release note so that if you noticed some odd behaviors on February 5th-6th, you don't take time trying to troubleshoot them because they were our fault and we have now fixed the thing that caused them.

What you might have seen:

- Searches in non-English characters were showing no results in full search results (but may have been fine in the autosuggest search)
- Searches in quotes like `"delete account"` weren't showing the quotes and instead showed something like `%22delete%account%22`
- Searches involving phrases like `delete account` were showing a % instead of a space, like `delete%account`. This was most obvious in the Searches with 0 Results reporting.
- For customers using custom redirects, you may have had navigation issues or homepage loading issues

We undid the change that caused all of these issues, so you won't see it going forward. We just wanted to keep you informed in case you did receive reports from your authors/readers or noticed anything odd in the search dashboard reporting for this week.

In short: we tried to change something to benefit customers, which broke a couple things, and then undid the original change so nothing would be broken, and now we're exploring alternative solutions.

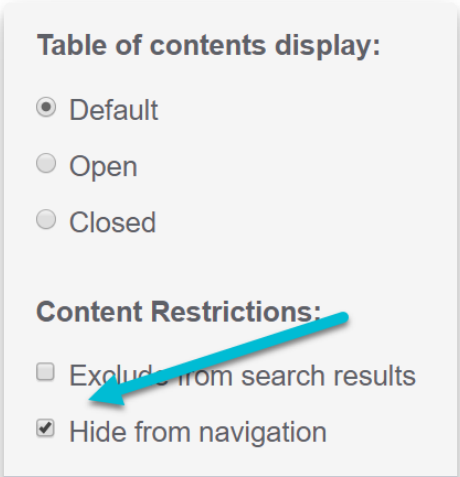
I promise, we'll have happier updates soon, and thank you to the customers who immediately reached out to let us know something was off--it helped us identify where the issue was to get things addressed as quickly as possible!

February 13, 2020

Last Modified on 05/29/2024 5:27 pm EDT

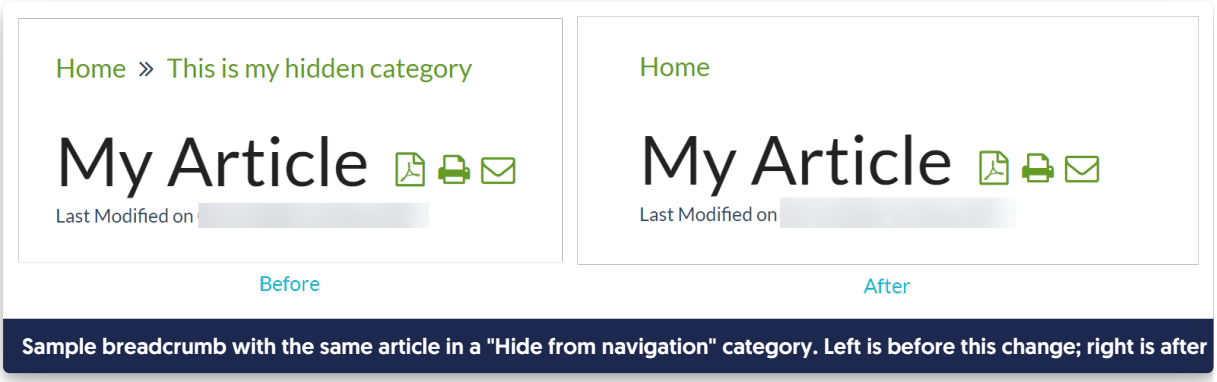
Bug Fixes

- **Ratings report - deleted articles:** One of our sharp-eyed Reporting authors noticed that deleted articles and categories that had received ratings before they were deleted still sometimes showed up in the Article Ratings Report in the Dashboard. We've fixed this report so that deleting an article or category removes it from this report. The ratings are still saved, though, so if you deleted the article by accident and then recovered it, you'll see the ratings back in the report afterward!
- **Breadcrumbs + Categories hidden from navigation:** As we were designing things in Widget 2.0, we realized that categories that are marked as "Hide from navigation" were being hidden from the table of contents and category/subcategory navigation but were still showing up in article breadcrumbs.



Category "Hide from navigation" setting

We discussed this and decided that "Hide from navigation" should include breadcrumbs. So we've updated the breadcrumb logic here so that if you're viewing an article in a category hidden from navigation, you don't see the category in the breadcrumb, either. Now your "hidden" categories truly are hidden everywhere.

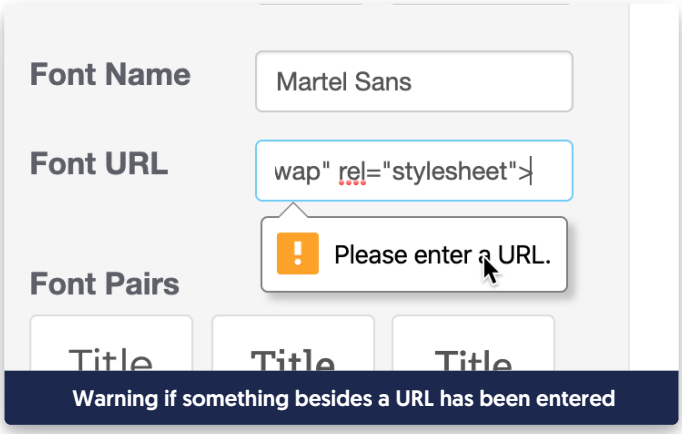


Sample breadcrumb with the same article in a "Hide from navigation" category. Left is before this change; right is after

- **URL redirect articles:** articles set up as URL redirects set to open in a new tab were opening in the same tab. We fixed this so that the redirects properly respect the open in same tab/open in new tab designation.
- **More Save options on smaller screens:** The expanded save options we released earlier in January weren't

always showing on small laptop screens due to a hiccup in the responsive design. We fixed that. More save options for everyone!

- **Remote authentication + custom reader fields:** Apostrophes in custom reader fields created through remote authentication were being encoded differently than apostrophes in custom reader fields created within app.knowledgeowl.com. We updated the encoding for reader custom fields created via API so that these apostrophes are handled the same way.
- **Custom font interface:** Entering something other than a URL into the custom font URL field (such as a stylesheet) was causing issues for customers, so we've added logic here so that if you try to save and you've entered something other than a URL, the save won't complete and you'll be warned that you need to fix it:



Warning if something besides a URL has been entered

- **Browser compatibility - Microsoft Edge:** some Microsoft Edge authors had noted that the background image we use at the top of app.knowledgeowl.com had grid lines on it. On further testing, we found it was pretty finicky about screen size and zoom level, so we decided to shift the background in Edge to be just a solid dark blue. Sorry you're now missing that little extra bit of personality, Edge authors--blame Microsoft.

February 14, 2020

Last Modified on 05/29/2024 5:27 pm EDT

This week, Chrome version 80 is rolling out changes to how third-party cookies are used. The change will outright block third-party cookies that don't meet certain requirements.

In anticipation of this change, we updated a number of the third-party cookies that KnowledgeOwl uses, with a particular focus on cookies leveraged by our contextual help widgets (both Widget 2.0 and the Modern Widget), including those requiring authentication to view all files. We rolled out fixes to address these changes on Friday, February 14.

We have had reports from a couple customers who are using non-https knowledge bases who have run into issues with these new policies. In these situations, the fastest fix is to transition your knowledge base to use https: (by checking the Force SSL Links option in Settings > Basic, which will shift your knowledge base from http: to https:). Customers using private domains that aren't using https: will need to coordinate with your domain administrators to make this change. If you're experiencing issues with your knowledge base this week, please contact us .

March 2, 2020

Last Modified on 05/29/2024 5:27 pm EDT

Bug Fixes

- API-based webhooks for contact form submissions were previously firing for all knowledge bases even when only specific knowledge bases were selected in the webhook. We fixed the logic here so that the webhook will only fire for the selected knowledge bases (unless "All Knowledge Bases" is used--then, as expected, it fires for contact form submissions from any knowledge base).
- Uploading files using the API wasn't playing well with our storage provider. We've updated the logic there so POST calls to create new files work properly.
- Articles clicked on from default categories with content lists were opening in a new tab. This has been updated so they open in the same tab.

Smarter login default for new KBs

Last Modified on 05/29/2024 5:27 pm EDT



We've had a few customers report that they had some confusion while trying to set up their reader login page. This might have been you if:

- You have a knowledge base set to use KO reader accounts (rather than remote auth or SSO)
- You have a login link in the upper right
- That login link didn't do anything

Fun fact: all new knowledge bases have the login template added to their top navigation, but that reader login page isn't automatically activated/set-up. You have to go to **Settings > Basic** and check the box next to "Add a reader login / logout link" in the Website Settings section for it to work.

But we were showing the Login link automatically in new knowledge bases, even if that box hadn't been checked. This was misleading--if the link shows up, shouldn't that mean it's enabled?

So to help avoid confusion for customers using KO-based reader accounts, we've tied the logic on that login link so that you won't ever see the link in your knowledge base unless you've checked the "Add a reader login / logout link" box in **Settings > Basic**. It's a small change and many of you may never notice, but we're hoping this makes it easier for customers who are just testing out reader logins to figure out how to activate the login page.

This means that some of you might see that link disappear. If you'd like it back, just head over to Settings > Basic and add the reader login from there.

Note: this change won't impact customers whose default reader login page (**Settings > Security**)

is set to use **Remote Auth Login URL** or **SAML Login URL**; it only impacts those using the **Reader Login page**.

Bug fix: Zendesk contactForm.submit webhooks

Last Modified on 05/29/2024 5:27 pm EDT



Recently, a customer using our Zendesk Contact Form integration noticed that API webhooks set to fire for specific knowledge bases were, instead, firing for all knowledge bases. This was an issue with all knowledge bases, but we discovered additional bugs with the integration with Zendesk Contact Form integration.

We've now addressed those issues. The API webhook for contactForm.submit will now properly fire when you select "All Knowledge Bases" or select specific knowledge bases, and it will fire consistently for knowledge bases using email address contact form, Zendesk contact form, and Freshdesk contact form.

The webhook will also properly fire from the Contact us button in the Modern Widget. (Widget 2.0 Contact

tab is not yet wired up to Zendesk or Freshdesk integrations.)

Not familiar with webhooks? Webhooks are a way to automatically communicate when certain actions in your knowledge base occur, including article creation/publication/update, comment creation, and contact form submissions. You can send webhooks via API call or via Slack.

Login issues due to unsecured sites/non-SSL

Last Modified on 05/29/2024 5:27 pm EDT

We've had reports from several customers of issues logging into their knowledge base. In most cases, this seems to crop up when folks are using Chrome, but we have seen it occasionally in other browsers.

This might be you if:

- You're using Chrome to try to login and it accepts your username and password but then kicks you back to the login screen
- You click View KB from within app.knowledgeowl.com and get kicked to a login screen
- You have readers reporting they are having trouble logging in despite resetting passwords, etc.
- Your remote authentication is failing when it used to work fine
- You can login to your knowledge base on some browsers but not others

The most likely cause of this issue is that your knowledge base is not set up to use https:. Take a look at the URL of your knowledge base. If it begins with http: or if it shows as "unsecured", keep reading to resolve your issue.

Why is this happening?

Browsers are slowly tightening security restrictions and warning when sites aren't secured using https:. Chrome recently rolled out a number of security-related changes that make accessing http: sites harder than before, so we're seeing a sharp increase in knowledge bases reporting this issue. We've always given you the option to choose between http: and https:, and for a long time http: was the default. Older knowledge bases in particular may still be using http:.

How do I fix it?

KO subdomains

If you are using a KnowledgeOwl subdomain (such as myawesomekb.knowledgeowl.com), you are likely no longer impacted by this issue. Earlier this week, we automatically switched all KO subdomain knowledge bases to use https:. But here's how you would change it:

1. Go to **Settings > Basic.**
2. Check the Domain Settings section. Be sure the **Force SSL** box is checked.
    a. If it is checked and you're experiencing issues, contact us .
    b. If it's not checked, please check it, save the settings, and try logging in again.

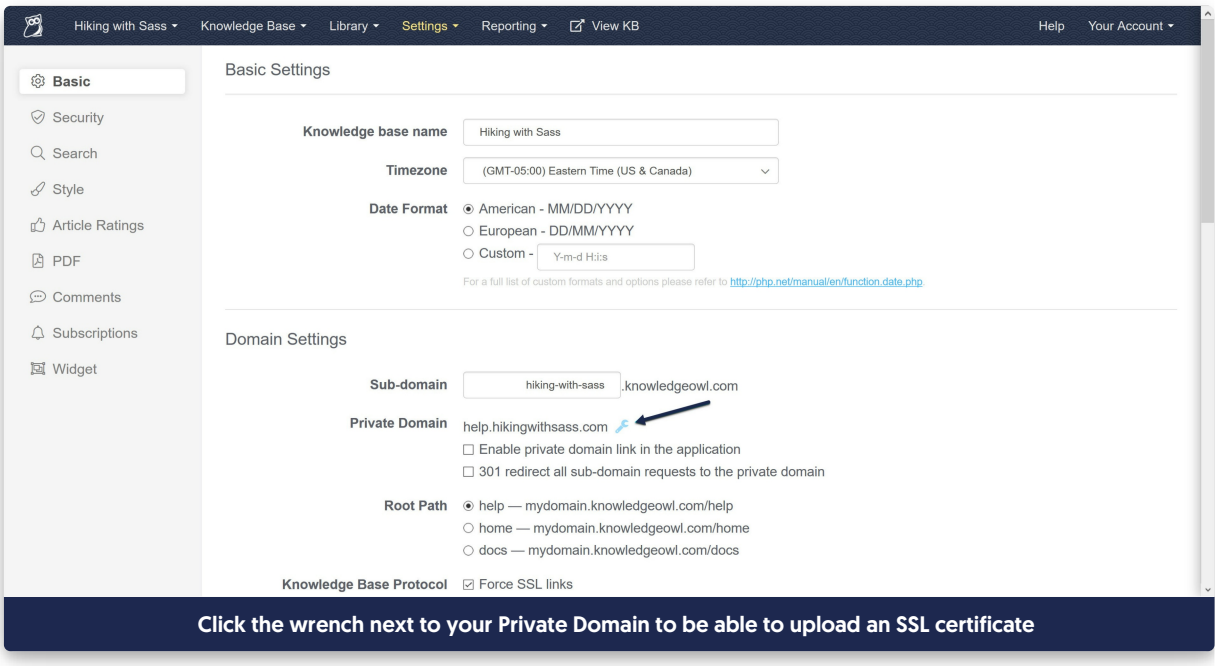
Private domains

If your knowledge base uses a private domain (such as help.mycompany.com) and your knowledge base is not using https:, you will need to add an SSL certificate before you can change the Force SSL setting.

In the coming weeks, we will be adding a way to create and add SSL certificates directly yourself in-app. If you need to fix this issue ASAP before we release that feature, follow the steps below.

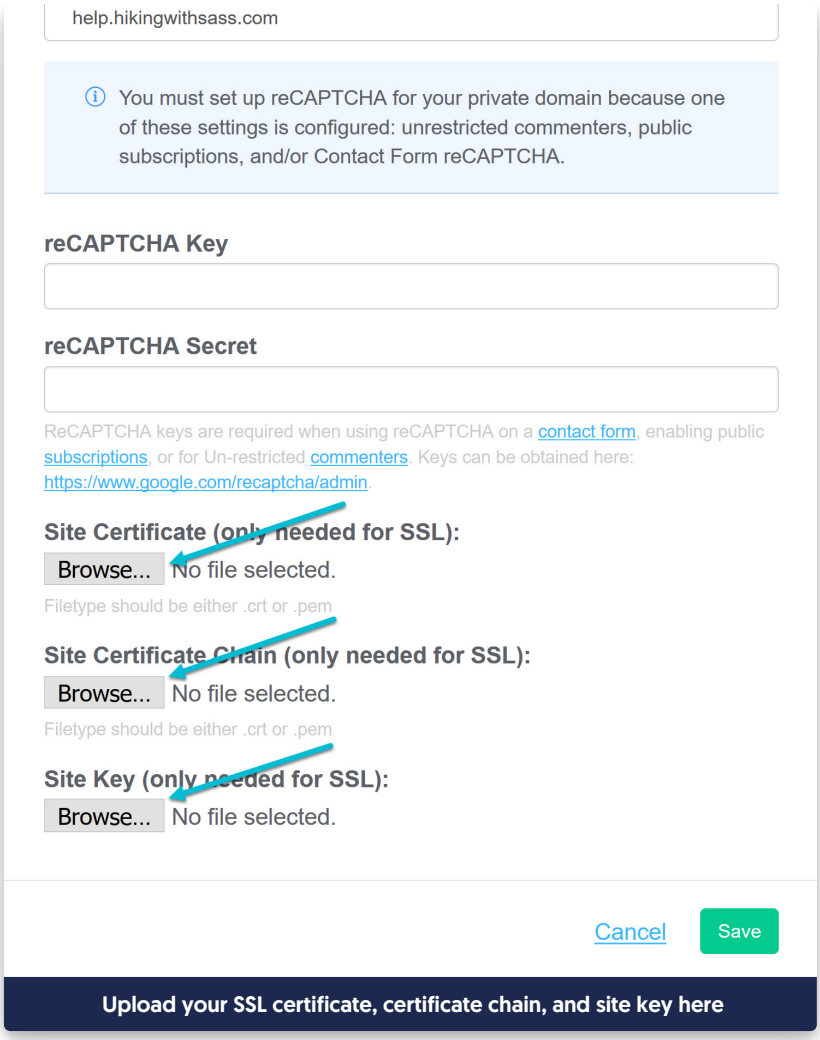
To do so:

1. **Go to Settings > Basic.**
2. **Click on the wrench next to your private domain.**



Click the wrench next to your Private Domain to be able to upload an SSL certificate

3. **This will open the private domain configuration pop-up. Here, you can upload your SSL Site Certificate, Site Certificate Chain, and Site Key.**



4. Click **Save** once you've uploaded them.
5. This sends your files to our development team, and they will complete the SSL cert setup and notify you once it's complete.

Once you receive confirmation that the SSL cert has been added:

1. Return to **Settings > Basic.**
2. Check the box next to **Force SSL.**
3. **Save.**

Contact us if you have any questions or run into problems making these changes.

Glossary term + auto-highlighting updates

Last Modified on 05/29/2024 5:27 pm EDT

We've released a couple updates to our Glossary term feature, updating some behavior for multi-word glossary terms and for terms with special characters in them.

Multi-word and single word glossary terms containing the same word

Thanks to input from customers, we learned that there was one situation where multi-word glossary terms weren't automatically being highlighted: when the longer phrase contained another glossary term.

In those situations, the shortest glossary term was being highlighted, not the full multi-word term.

Example: if I had "check" as a glossary term and "price check" as another glossary term, when I had price check in my article, only the "check" definition would highlight and display.

If you run into this situation, we recommend manually adding the correct multi-word glossary term using the steps in Add glossary definitions in articles manually.

For example, nocturnal owl is a glossary term. So is "nocturnal". If you hover over the definition earlier in this sentence, you'll see only the definition for nocturnal is showing--not for the full multi-word term.

But I can force this to show the correct definition if I manually insert the nocturnal owl term and definition to ensure it highlights properly (which I've done in this sentence).

This manual highlighting of multi-word glossary terms should only be necessary when you have other glossary terms that contain a portion of that term, or when you want to include highlighting for a term that doesn't match exactly, such as nocturnal owls.

Glossary terms no longer support special characters

We had some customers report that glossary terms with special characters (especially parentheses) in them were never auto-highlighted. We tried to update the auto-highlighting so that it would recognize these special characters, but we could not find a solution that would properly support these special characters.

Instead, we have updated the Glossary logic so that it no longer allows you to create terms with special characters that our auto-highlighting feature doesn't support. We did not touch existing glossary terms, but **all new glossary terms can only contain alpha-numeric characters, spaces, dashes, underscores, and apostrophes.**

If you have glossary terms that also include an acronym in parentheses, you won't be able to update these terms without removing the parentheses. For these situations, we recommend putting the acronym as part of the definition or having separate definitions for the full term and the acronym.

Bug fix round-up April 1, 2020

Last Modified on 05/29/2024 5:27 pm EDT

We just rolled out a fewer small bug fixes:

- In February, we fixed an issue with **Remote authentication + custom reader fields**: Apostrophes in custom reader fields created through remote authentication were being encoded differently than apostrophes in custom reader fields created within app.knowledgeowl.com. We have some customers using the remote-auth endpoint for this, and some using remotelogin. We made sure that the fix was applied to both methods.
- **Force SSL:** We are getting very close to releasing an in-app SSL cert solution for all customers. In the meantime, to discourage customers from switching back to a non-https: state, we've hidden the Force SSL option from **Settings > Basic** if it's already been enabled. Given the number of Login issues due to unsecured sites/non-SSL we've seen lately, we hope this is a helpful proactive step.

Deprecation announcement: Kayako Contact Form

We recently re-tested our Contact Form integrations and updated the instructions for them. However, the Kayako integration was in need of some major updates. We reviewed customer usage and determined that this integration is used by very few customers, so we have decided not to put more development resources into updating it.

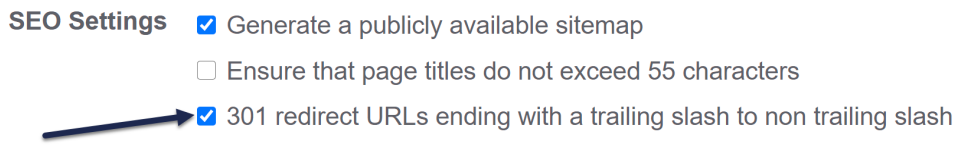
Customers who are already using this integration will still see it as an option in **Knowledge Base > Contact Form**; all other customers will not.

Please contact us if you are using this integration and it doesn't seem to be working as you need it to, or if you'd like assistance transitioning your Contact Form to a different send option.

New SEO Setting for trailing slashes

Last Modified on 05/29/2024 5:27 pm EDT

We've added a new option in Settings > Basic to help maximize your SEO: the option to 301 redirect URLs ending with a trailing slash to non-trailing slash.



Typically, a trailing slash indicates that content is a directory, whereas no trailing slash indicates that content is a file or end-content page. By default, search engine indexing will treat these two URLs as separate content:

- **https://support.knowledgeowl.com/help/glossary-term-auto-highlighting-updates**
- **https://support.knowledgeowl.com/help/glossary-term-auto-highlighting-updates/**

Even though they point to the same content.

While we don't use trailing slashes in our URLs, your readers may be adding them manually when they type or link to content, or outside applications may add them on redirects or remote login. While this won't prevent people from finding content, that duplicate SEO indexing can mask actual usage.

To avoid this issue, you can check the box to 301 redirect URLs ending with a trailing slash to a non trailing slash.

Customers using remote authentication or other API-based integrations should check with your IT staff before making this change, as it may break some remote login scripts that expect a trailing slash.

You can read more about this SEO setting and others in our SEO best practices guide.

Widget 2.0 and Hidden Categories

Last Modified on 05/29/2024 5:27 pm EDT

We released a small change to Widget 2.0, which affects articles that are located within categories that have the "Hide from navigation" box checked.

Previously, if you searched for and opened an article that was in a hidden category in Widget 2.0, you could still navigate to the category using the breadcrumb.

Now, the breadcrumb properly hides the hidden category.

The overall behavior with categories hidden from navigation in Widget 2.0 is:

- The category will not appear in the Knowledge tab or be available as you click through navigation in the Knowledge tab
- If you open an article within a hidden category, the breadcrumbs at the top will not display the hidden category

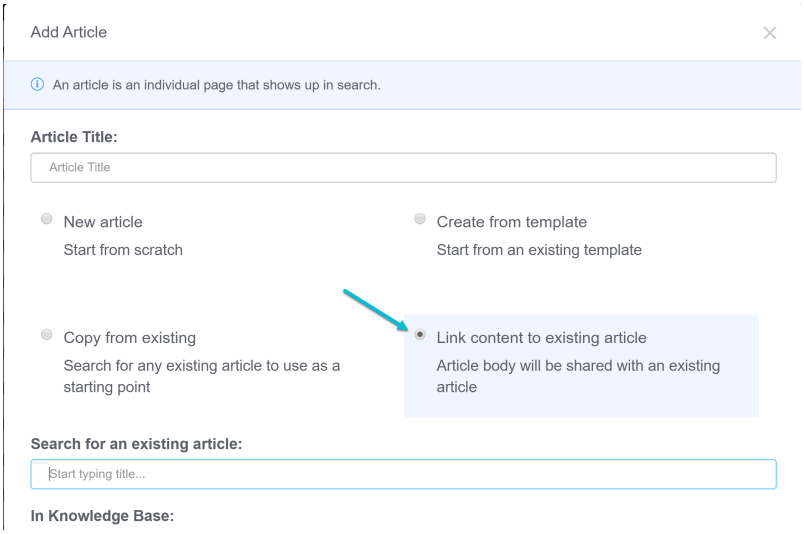
Linked content + suggest API endpoint updates

Last Modified on 05/29/2024 5:27 pm EDT

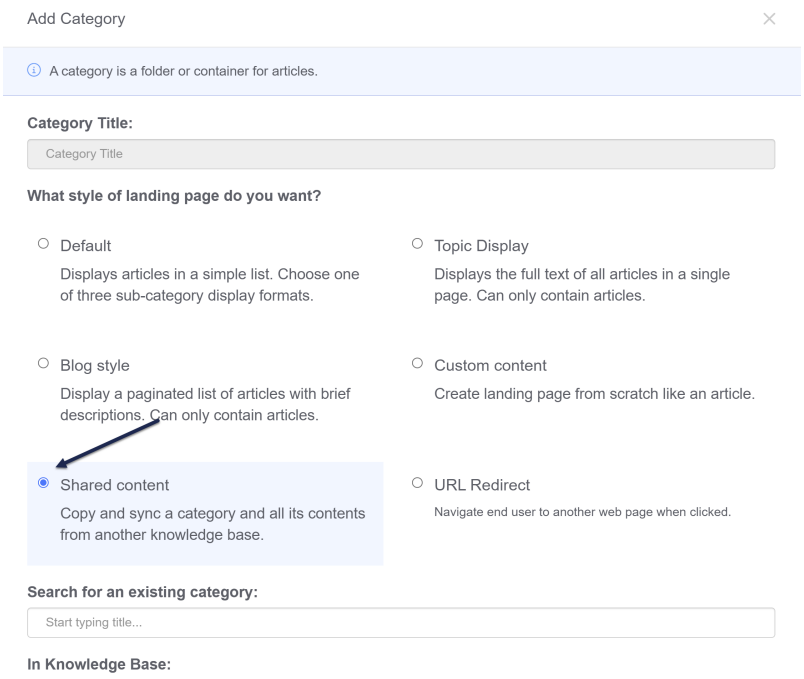
We released some bug fixes for linked content that impacts the content itself as well as the suggest API endpoint.

Linked content is content that is automatically synchronized within KnowledgeOwl--updating it in one place will automatically update it somewhere else. There are three ways to create linked (synchronized) content in KnowledgeOwl:

- Using the "Link content to existing article" option when you create a new article (which allows you to create linked articles within the same or a different knowledge base):



- Using the "Shared content" option when you create a new category (allows you to create linked categories between multiple knowledge bases):



- **And you can create a completely synchronized copy of a knowledge base**

For all three linked content types, there is a "parent" piece of content (the original), and a "child" (the copy that is synchronized back to that original).

We found and fixed two issues for child content:

- **If you use the suggest API endpoint, the summary field for child content was previously blank. It is now properly populated.**
- **If your search results are formatted to use meta descriptions and to show child articles, those meta descriptions were not properly showing up for the child articles' search results before. They are properly showing now.**

These updates include security patches.

Introducing category internal titles

Last Modified on 05/29/2024 5:27 pm EDT

Do you have similarly-named categories or subcategories? Have you ever struggled to find the correct category when you're inserting a link to a category, or you want to move an article from one category to another?

If you've struggled with this in the past, you might want to consider using internal category titles. We've long had internal titles for articles, and we had feedback from a number of customers that an internal category title would be useful when you have similarly-named categories.

Internal category titles are alternative titles for your categories which will be displayed only within app.knowledgeowl.com. Your knowledge base readers won't ever see them. Think of them as an administrative convenience, a way to name something internally so it's easy to find, separate from the category title you present in your knowledge base.

Want to use these in your knowledge base? Read on for more information.

For each category, you can add an internal title. Internal titles are used only within app.knowledgeowl.com - your readers do not see them when viewing the knowledge base.

Internal titles can be useful when you have a lot of categories or subcategories with very similar names, and you want to be sure you're selecting the correct category when you use:

- The Insert Link to Article option in Modern Editor
- The Related Articles section
- The Change Article Category option in the article editor

To add an internal title to a category:

1. Open the category settings. Refer to Edit a category for more information.
2. Select **Add Internal Title**.



3. The **Internal Category Title** field displays. Enter the title you want to use internally here.



4. Be sure to **Save** your changes.

Where will I see internal category titles?

The internal title is displayed instead of the Full Article Title in these places within app.knowledgeowl.com:

- The Articles hierarchy
- In the editor, the Category display beneath the Author field, along with the pop-up search to change

categories when that gear icon is clicked
- The Manage Articles CSV export > Basic > Category and Breadcrumbs columns
- The Insert Link to Article pop-up/search in the editor
- The Related Articles search in the editor (only Topic Display and Custom Content categories show up in this list)
- If you have synced categories between different knowledge bases, the internal title will display in the editor messages identifying the synced categories.

Use cases

My knowledge base might contain one category for each of my products, and I might use the same subcategory hierarchy for each product. So this might be my first two products:

- Opportunities for Owls
  - Setup instructions
  - Troubleshooting & tips
  - Customization
- Fight & Flight
  - Setup instructions
  - Troubleshooting & tips
  - Customization

When I want to reference the Fight & Flight Customization subcategory to assign an article to it, or Link to Article to that subcategory, right now if I search Customization, both of these will come up and I won't be able to tell which is for Opportunities for Owls and which is for Fight & Flight. I don't want to change the titles of the categories themselves, because I don't want my customers to see that difference.

I can add an Internal Title to both categories to distinguish them, and that's what will be used for all app.knowledgeowl.com layouts:

- Opportunities for Owls
  - Setup instructions - OfO
  - Troubleshooting & tips - OfO
  - Customization - OfO
- Fight & Flight
  - Setup instructions - F&F
  - Troubleshooting & tips - F&F
  - Customization - F&F

This way, when I link to a category or I edit the category, I can search for Customization - F&F and know I'm always getting the correct category.

Updates to Knowledge Base > Manage Articles

Last Modified on 05/29/2024 5:27 pm EDT

Manage Articles lets you view, search, filter, bulk edit, and export a CSV of articles across your entire knowledge base. We know this can be a useful interface for updating articles in bulk and completing content audits, so we're always looking for ways to improve it.

We've released several small fixes as well as some new functionality to this interface.

Here's the functionality we added:

- The Bulk Edit options now include the ability to set articles to **Exclude from search results** and **Hide from navigation**
- For articles with versions, the Bulk Edit options now include the ability to publish the next version in "Ready for review" state -- very useful when you want to publish documentation en masse for product releases or updates, policy updates, etc., without individually having to publish each article's latest version

On the bug fixes, we ensured that the Manage Bulk Edit and Delete options properly respect author teams and custom author roles:

- When content is restricted to editing by specific author teams, some authors could still bulk edit articles belonging to other author teams. We have fixed this so that author team restrictions are properly enforced for all bulk edit actions (publishing status, author, tags, etc.).
- Authors with custom roles that did not include the ability to delete articles were able to delete articles in bulk. The Manage bulk delete options (Publishing Status > Deleted as well as the Delete link) now properly respect custom roles limiting deletion.
- Authors with custom roles preventing them from editing published articles could sometimes still bulk edit articles with a published status. The Manage bulk edit options now better enforce those custom role publishing status permissions.

Fix for bulk publishing of versions in ready for review state

Last Modified on 05/29/2024 5:27 pm EDT

We just recently announced the ability to use Manage > Bulk Edit to publish versions marked "ready for review." One of our customers testing the new feature noticed some glitches with the version notes field when articles were bulk published. In some cases, they were disappearing.

We've updated the logic here so it properly shows version notes.

These updates include security patches.

Kinder, easier SSL certs with Let's Encrypt integration

Last Modified on 05/29/2024 5:27 pm EDT



We are excited to announce the release of one of our key 2020 roadmap features: an integration with Let's Encrypt to provide free, autorenewing SSL certificates to all of our customers with private domains.

You're always encouraged to set up a private domain for your knowledge base, so that instead of having a mykb.knowledgeowl.com subdomain, you can use something like help.mycompany.com. If your main company website is served over https:, then we need an SSL certificate to be able to handle your private domain over https:.

Previously, the setup for this involved a lot of work: customers had to download their own certificates, then upload the details to KnowledgeOwl, and then we had to do some manual work to finish the setup. That took some work, and if your SSL cert was in an unusual format, it could take several days and many emails to get things set up properly. It also meant that customers needed to remember when their own certificates expired.

We've never liked this process. One of our goals for 2020 was to deliver a more automated, less painful SSL certificate setup process to our customers.

We've integrated with Let's Encrypt to provide nearly instantaneous, free, auto-renewing SSL certs directly to all of our customers. The certificates will renew themselves automatically for as long as you are a KnowledgeOwl customer, and the setup only requires that you have the correct CNAME record configured on your DNS--a requirement for using private domains at all.

With the CNAME entry in place and validating, you can get your private domain and SSL cert fully set up in under 10 minutes.

If you've been thinking of using a private domain but have been intimidated by the SSL certificate process, please go check out the docs and get yours set up today!

What if I already have a non-Let's Encrypt SSL cert for my private domain?

Your SSL certificate will continue to work until it expires.

You're welcome to switch to a Let's Encrypt SSL cert at any time by following the private domain setup instructions. The transition should be seamless. If you don't see the new certificate show up:

- Have more than 10-15 minutes passed? It can take a few minutes for the certificate to switch over to the new one
- Clear your cookies and do a hard refresh; recheck the cert after

If you're still not seeing the knowledge base showing the new Let's Encrypt certificate after trying both of the above, contact us and let and we'll take a look.

Bulk reader import bug fix + new API snippet variable

Last Modified on 05/29/2024 5:27 pm EDT

Two small changes for today:

In the reader bulk importer, we discovered that if you had the same reader name twice, but one of the rows had trailing blank spaces, the bulk reader importer wouldn't identify them as duplicates. It would strip the trailing blank spaces, though, so it created duplicate reader accounts in this situation. We updated the importer so that it trims all blank spaces first before evaluating for duplicates.

If you're using API calls in snippets, we've added a new variable you can use in your API calls: `%cur_search_term%`. It will pull in the "phrase" parameter in the URL. This might be useful for searching a specific category, searching another knowledge base and displaying the results, or building a custom search.

Also, since you took the time to read this: I can't give you much as a reward. But have you ever wondered how owls can turn their heads so far around? So did I, and it turns out it's a combination of oversized arteries with detour connections. #themoreyouknow

Use your own SMTP provider for reader emails

Last Modified on 05/29/2024 5:27 pm EDT

You can now set up your reader welcome emails and reader password reset emails to be sent through your own or a third-party SMTP provider.

This can be especially helpful if you've had any issues with reader welcome emails or reader password reset emails getting flagged as spam or a firewall has prevented their delivery outright.

If you've already customized the from name or reply to address for reader welcome or reader password reset emails, those values will still be used; if you haven't changed those, the SMTP values will serve as a default.

Exclude category from search

Last Modified on 05/29/2024 5:27 pm EDT

We've added a new feature to the Search Settings page: the option to exclude a single category *and all of its content* from search.

This will automatically exclude all articles from the category and its subcategories from search without having to use the "Exclude from search results" checkbox in each individual article.

We're testing this out supporting one category per knowledge base. See the full documentation to try it out for yourself.

Widget 2.0 + Snippet merge codes in titles

Last Modified on 05/29/2024 5:27 pm EDT

We released a small but important bug fix to Widget 2.0. Previously, if you had articles or categories with a snippet merge code in the title, Widget 2.0 was displaying the merge code itself. So if you had an article with something like "{{productName}} installation instructions", that's exactly what would show in Widget 2.0.

Now, Widget 2.0 properly replaces the snippet's merge code with the text the snippet contains, so your article would properly say "KnowledgeOwl installation instructions", for example.

These updates include security patches.

Style Settings rollback to previous save

Last Modified on 05/29/2024 5:27 pm EDT

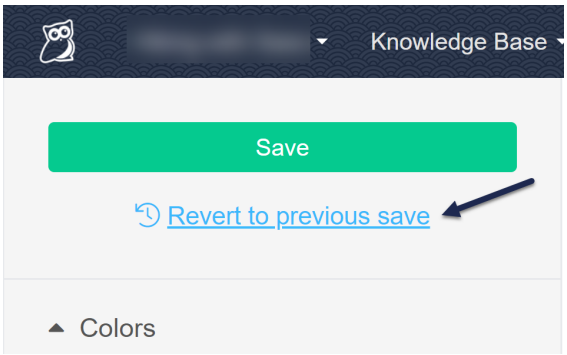
Have you ever made changes to Settings > Style and then immediately regretted them?

Well, we have. More times than we'd care to count. And we've had to try to use our logs to wind back changes that customers mistakenly made, too.

We've just released a new feature that we hope helps with situations like this: Style Settings rollback.

In the upper left of **Settings** > **Style**, you'll now see a new Save button.

Moving forward, once you save new changes on that page at least twice, you'll see a link appear under that button to **Revert to previous save**:



You can use this link to revert to one of the three previous saves. See Undo changes to Settings > Style for the full details and usage!

Search Settings consolidation

Last Modified on 05/29/2024 5:27 pm EDT



Previously, settings that change search behavior were mostly in Settings > Search, but there were a few older settings that still lived in Settings > Basic.

We don't like moving people's cheese, but sometimes it's the best solution.

As part of some 2020 housekeeping, we've now moved these search settings from Settings > Basic to Settings > Search:

- Use meta description as article blurb in search results and category pages
- Allow readers to filter searches by top-level category
- Allow readers to filter searches by second-level category
- Prevent child articles from being searched
- Index the content of PDFs included in articles that are larger than 100 pages

The functionality hasn't changed, but since this does move some settings you might be familiar with, we wanted to be sure you knew about it.

We also updated in-app wording and our documentation to provide more information on what each setting does; you can check out Settings > Search and Configuring search to see some of those changes.

We hope this makes it easier to find and test various search settings!

Your Account > Account bug fixes

Last Modified on 05/29/2024 5:27 pm EDT

After some previous upgrades to Your Account > Account, we had reports of two bugs:

- For some annual subscribers, once they updated their credit card info, the Account settings page was showing them as monthly subscribers and hiding the details of their payment info.
- The Update Credit Card pop-up had some odd wording which implied that we would charge the card for your next payment, even if it wasn't due yet
- For trial customers, a failed payment caused an infinite spinner

We migrated to a new version of Stripe checkout to help fix these issues. We retested with the customers who had reported things and things properly displayed and updated.

If you try to upgrade/downgrade your account or make a billing change and anything unusual happens, please let us know! Our goal with these updates has been to make updating your credit card and/or your plan as smooth as possible. If it feels a little bumpy or you find wording confusing, we'd like to know about it.

Prepopulate Contact Form fields in the URL

Last Modified on 05/29/2024 5:27 pm EDT

Have you ever wanted to be able to include a link to your contact form that would pre-populate some of the form's fields, like the Subject or the requester's name?

While we've solved this as a one-off customization for a few customers, we decided to build in some standard parameters that all customers could use. Now, if you insert a link to your contact form, you can include some additional parameters in the URL to do some of the work for you.

This can be a great convenience when you're inserting the link for a particular purpose (like requesting feedback on a particular feature) or when you're linking to the contact form from within an application or website and you want to pass along a customer's name, etc.

Now you can prepopulate the subject, details, name, and email fields of the contact form.

Here's a sample in action: Tell us how you might use prepopulated contact form fields!

Sound useful? Head over to Open the contact form with certain details filled in to get the full details.

API Keys: now with purpose (and editable)

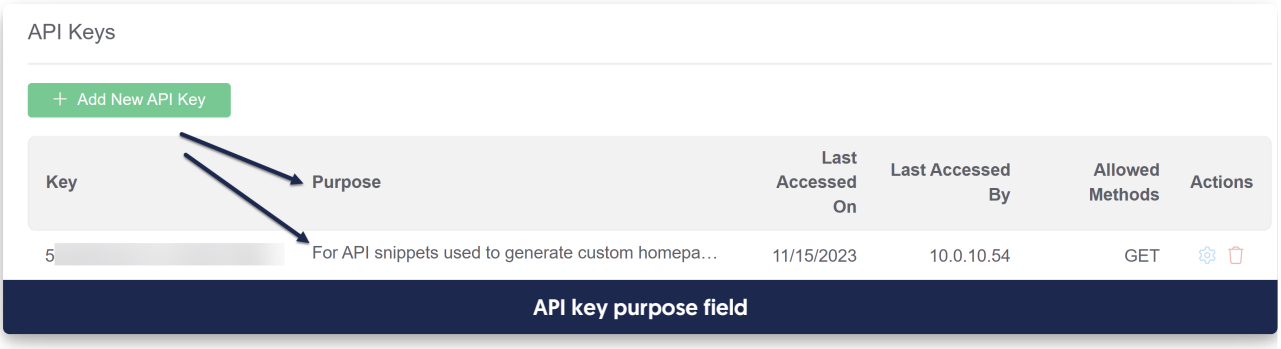
Last Modified on 05/29/2024 5:27 pm EDT

If you've been using our API keys--and struggling to keep track of which keys are used for what--you'll enjoy a couple of the new features we just released.

API keys now have purpose

We've had a few customers say that it would be useful to have a field to designate an API key's purpose for auditing and tracking, and we thought this was a fantastic idea.

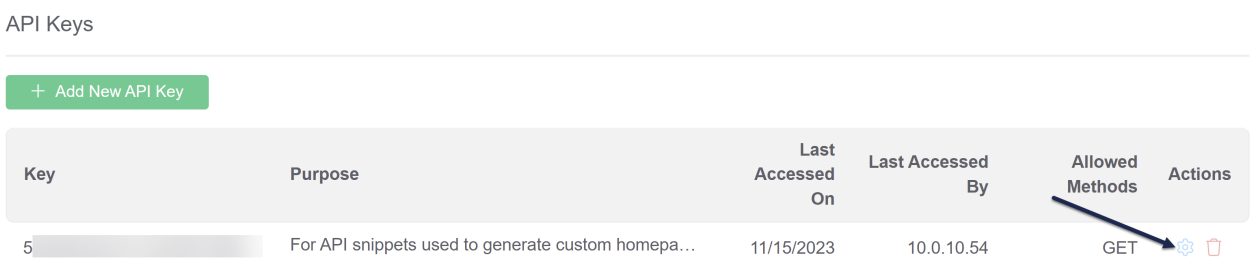
So we've added a Purpose field to all API keys. Use this field to add notes about which applications or integrations are leveraging the API key:



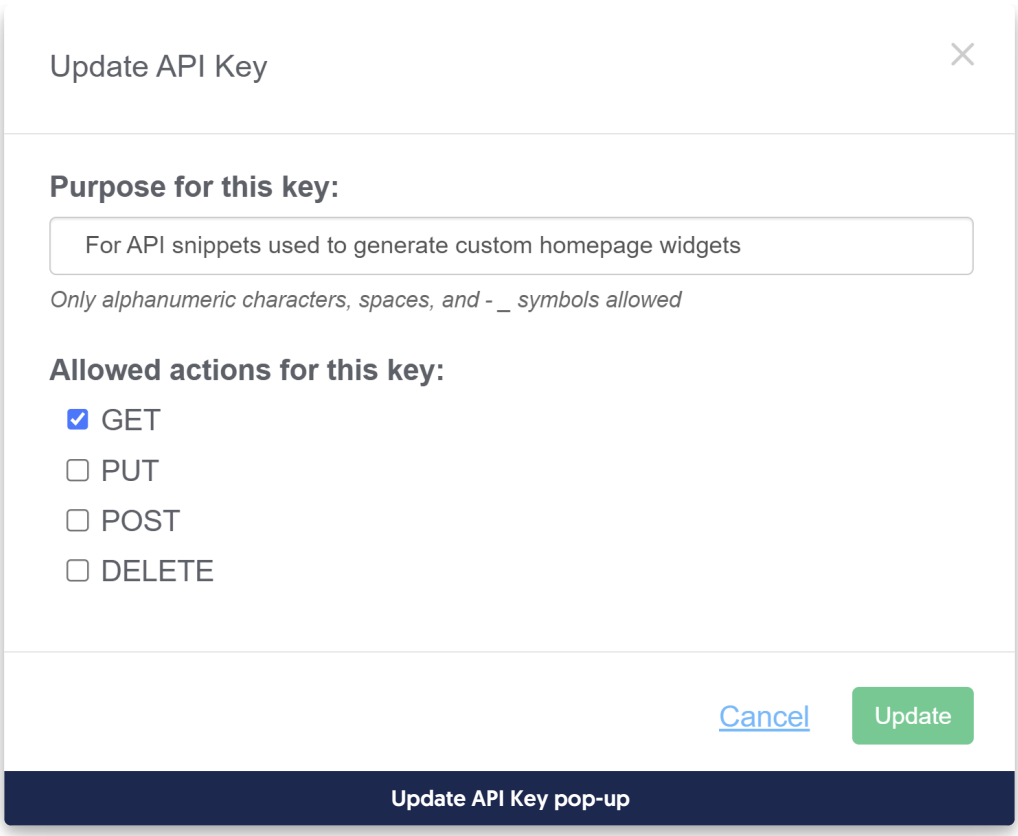
Since purposes can change over time, we are also happy to announce that:

API keys are now editable

Previously, if you wanted to change the allowed methods for an API key, you needed to create a whole new API key. Now, you can click the gear icon to the right of any API key to edit it.



This opens an Update API Key pop-up where you can edit the API key's purpose and allowed actions:



Update API Key pop-up

Widget 2.0 option: when only one recommended article, open widget directly to that article

Last Modified on 05/29/2024 5:27 pm EDT

As we work to check off the finishing touches on Widget 2.0, I'm happy to announce the addition of a small but often-requested feature: display lone recommended articles automatically.

Widget 2.0's default behavior is:

- If recommended articles exist for the current page, open to the Recommended tab
- If no recommended articles exist for the current page, open to the Knowledge tab

We've received requests from customers using or testing Widget 2.0 to add one more behavior to the Recommended tab:

- If there is only one recommended article in the list, automatically open the widget to that article

We've now added an option to **Settings > Widget** so that you can enable this behavior if you're interested in it. The option is in the Admin Settings section:



We have kept this as an explicit checkbox since we know some customers won't want this behavior.

Once you check the box, **Save** the settings change and you can immediately test the behavior in your knowledge base. You'll see:

- 0 recommended articles: widget opens to the Knowledge tab
- 1 recommended article: widget opens directly to the body of that article
- 2+ recommended articles: widget opens to the Recommended tab

Let us know what you think of this feature in the comments below or by dropping us an email. We'd love to know your feedback!

Widget 2.0 now supports explicit https:// and relative // URL protocols

Last Modified on 05/29/2024 5:27 pm EDT

When we first built Widget 2.0, we set it up to take a relative URL protocol (beginning with //).

We've had a couple customers who needed to be able to explicitly specify this as https:// in the widget embed code.

We've updated the logic so that it still uses the relative protocol by default but will also accept https: added to the start of the `_ko19.base_url` .

Glossary page alternate titles

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If you're actively using our glossary functionality, this latest release might be a nice addition.

We've added an alternate title to glossary terms. Think of these like display titles for your glossary terms:

- Alternate titles are used as display titles on the glossary page only
- They don't impact glossary term highlighting in any way
- Alternate titles can contain characters that are prevented in glossary terms (such as parentheses, quotations, etc.)

For example, here's one of our glossary terms:

We use "IdP" as text in our articles, but we wanted to display the full term with the acronym on the glossary page. The alternate title gives us that. Here's what it looks like on the glossary page:

When an alternate title is added, it will automatically be used on the glossary page. When no alternate title has been specified, the glossary term itself will be used.

For more information on using alternate titles, see When should I use alternate titles?

Let us know what you think of this feature using the comments below or dropping us an email!

Modern Widget: no more duplicate suggested topic display + custom content categories

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In Modern Widget, customers using the Recommend on page functionality noted that they were seeing duplicates of two types of recommended categories:

- Topic display categories
- Custom content categories

These two categories would show up twice in the "Suggested for you" section of the Modern widget.

We've updated the widget's recommended articles function and the single page application function to remove the duplicates.

You shouldn't need to make any changes to your widget embed code or function calls to see these changes, but let us know if you're still noticing any duplicates!

Author team order consistently displayed

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In doing some internal testing, we discovered that the display order set for author teams was not being respected everywhere that author teams are displayed. We've fixed this issue, so author teams are now displayed properly.

To set an author team order:

1. Go to Your **Account > Authors**.
2. Click on the **Teams** tab.
3. Use the up arrows next to your team names to reorder the teams.



Once you're done making changes, you'll see those changes reflected on:

- In article editor, the Restrict to Teams section
- In category editor, the Restrict Editing to Teams section
- In the edit screen for an individual author, in the Author Teams section
- In Manage Articles create/edit filter, the Teams section