



Custom PDF exports

Last Modified on 02/21/2024 11:33 am 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.

Standard PDF Custom PDFs HTML Zip

① Create a PDF from specific sections of your knowledge base. These exports can be as large or small as you choose.

+ Create New Custom PDF

Write the Docs



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Save and Regenerate PDF Export

Article Settings section



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Save and Regenerate PDF Export

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.

KnowledgeOwl SupportKnowledge BaseLibrarySettings127 ReportingView KB

ArticlesManageHome PageGlossaryContact FormExportsImport

Standard PDFCustom PDFsHTML Zip

Create a PDF from specific sections of your knowledge base. These exports can be as large or small as you choose.

Create New Custom PDF

4. Use the Custom PDF Options section to customize the layout of your PDF:

KnowledgeOwl SupportKnowledge BaseLibrarySettings127 ReportingView KB

ArticlesManageHome PageGlossaryContact FormExportsImport

Custom PDF Options

Content options1☐ Include a cover page

PDF Name2Custom PDF

Page Size3A4

Watermark Text4Optional

Password5Optional

Table of Contents Title6Table of Contents

Cover Page Title7KnowledgeOwl Support Knowledge Base PDF

Custom Cover Page Content8

Content Footer Left9

Content Footer Center10

Content Footer Right11[pdf("page-number")]

Use [pdf("cover-title")] for cover page title and [pdf("date-created")] for timestamp

Included Content

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- 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:

Included Content

- ☐ Write the docs
 - ☐ Categories
 - ☐ Create a category
 - ☐ Add a category or sub-category
 - ☐ Choose a category type
 - ☐ Default categories
 - ☐ Topic display categories
 - ☐ Blog style categories
 - ☐ Shared content categories
 - ☐ Custom content categories
 - ☐ URL redirect categories
 - ☐ Category appearance in the table of contents
 - ☐ Edit 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 Article Settings section

6

7

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4

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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).

Article Settings section

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`<a href="/help/download-full-pdf/id/559f118932131c6576c`

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!