Managing images and files

Last Modified on 04/18/2024 11:26 am EDT

Every image or file uploaded in KnowledgeOwl is stored to your File Library. Learn the tools available to manage and work with your File Library.

Introduction to the File Library

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:
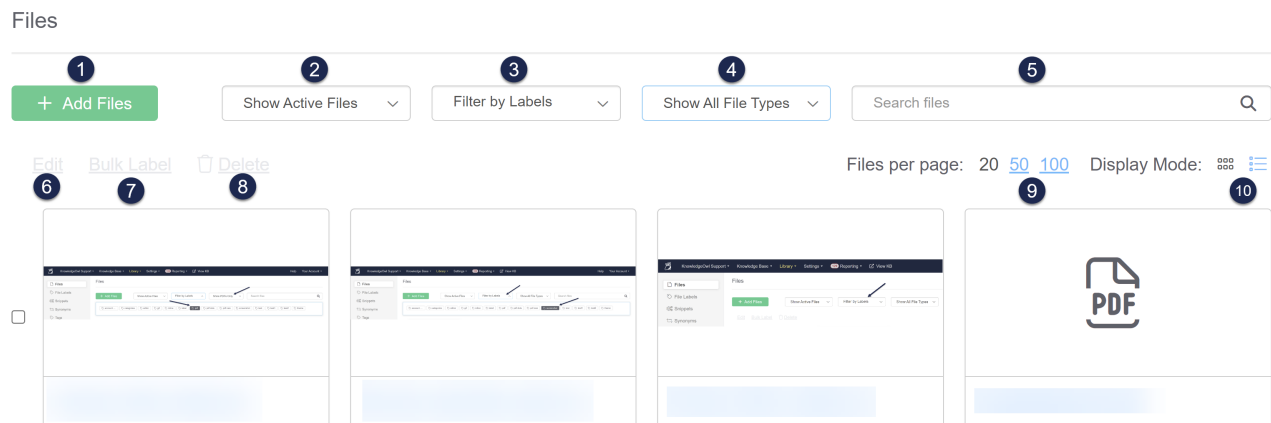
1. To add files directly to the File Library, use the **+ Add Files** button. This will open a pop-up where you can select the files to upload. See **Adding files and images in bulk** for more info.

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):
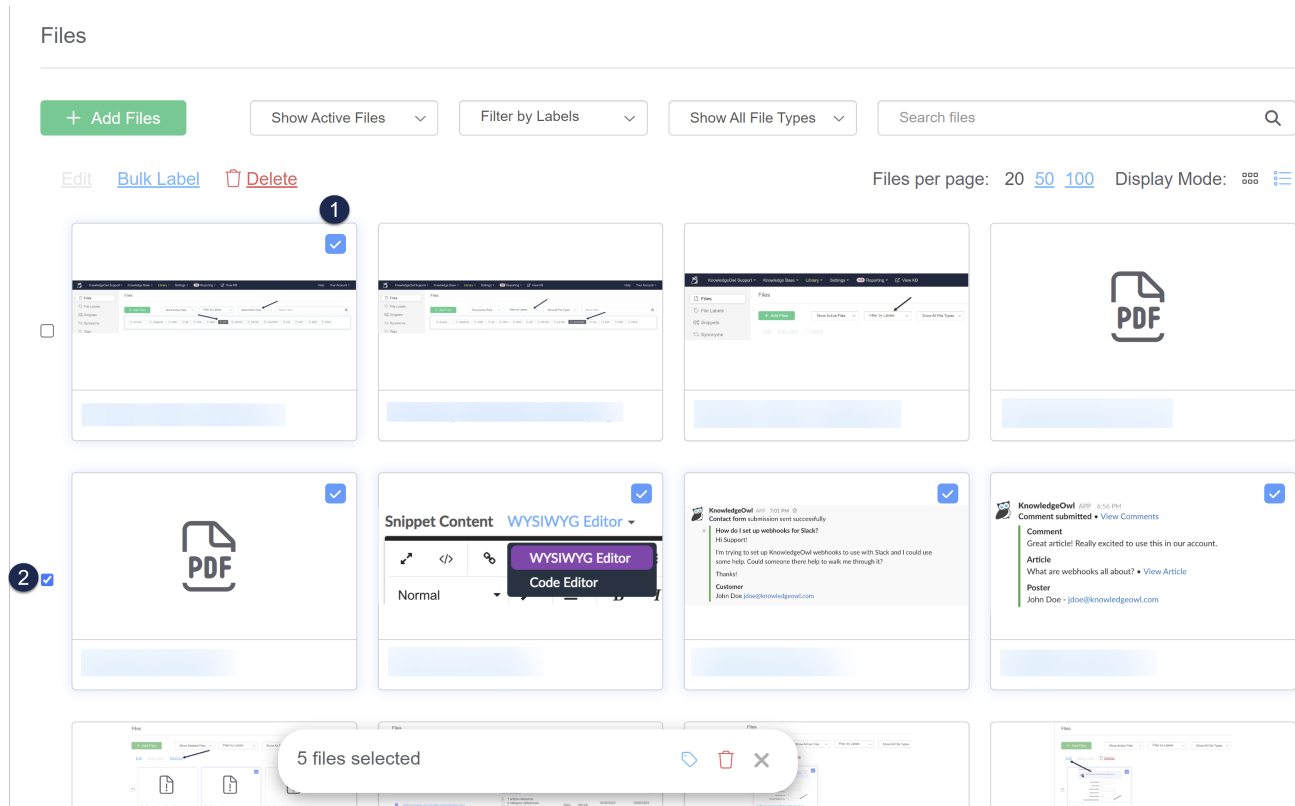
When a file is selected in the icon view, a white checkmark on a blue square will appear in the upper right corner of the thumbnail.

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.

List View

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:

Files

_____

+ Add Files | Show Active Files ▾ | | Filter by Labels ▾ | | Show All File Types ▾ | | Search files 🔍 |

Edit   Bulk Label   🗑 Delete   Files per page: 20 **50 100**   Display Mode: ⠿ ☰

☐	① **Name**	② **References**	③ **Labels**	④ **Type**	⑤ **Size**	⑥ **Date Created**	⑦ **Last Modified** ▾
☐	settings-basic-article-list-settings-numbered.png	📄 1 article reference 📋 0 category references ⚙ 0 snippet references View details...		PNG	89 KB	09/06/2022 2:04pm	12/23/2022 11:12am
☐	article-favorited-star.png	📄 1 article reference 📋 0 category references ⚙ 0 snippet references View details...		PNG	131 KB	12/23/2022 11:00am	12/23/2022 11:00am
☐	style-settings-homepage-popular-articles.png	📄 1 article reference 📋 0 category references ⚙ 0 snippet references View details...		PNG	185 KB	12/23/2022 10:54am	12/23/2022 10:54am

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?

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!
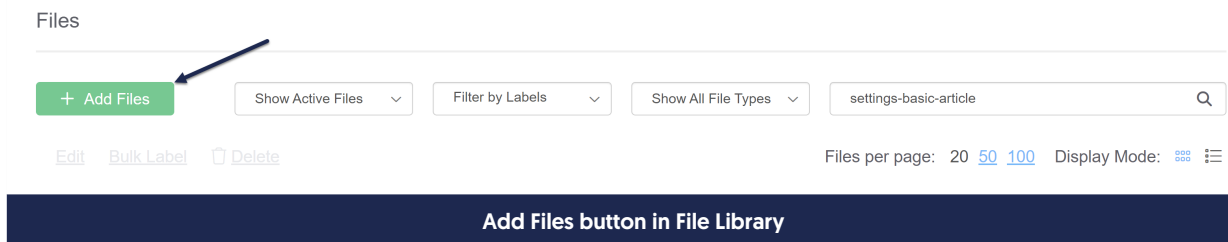
They're equally useful for:
- Editing individual file details (name, file labels, the file itself)
- Deleting or restoring files

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
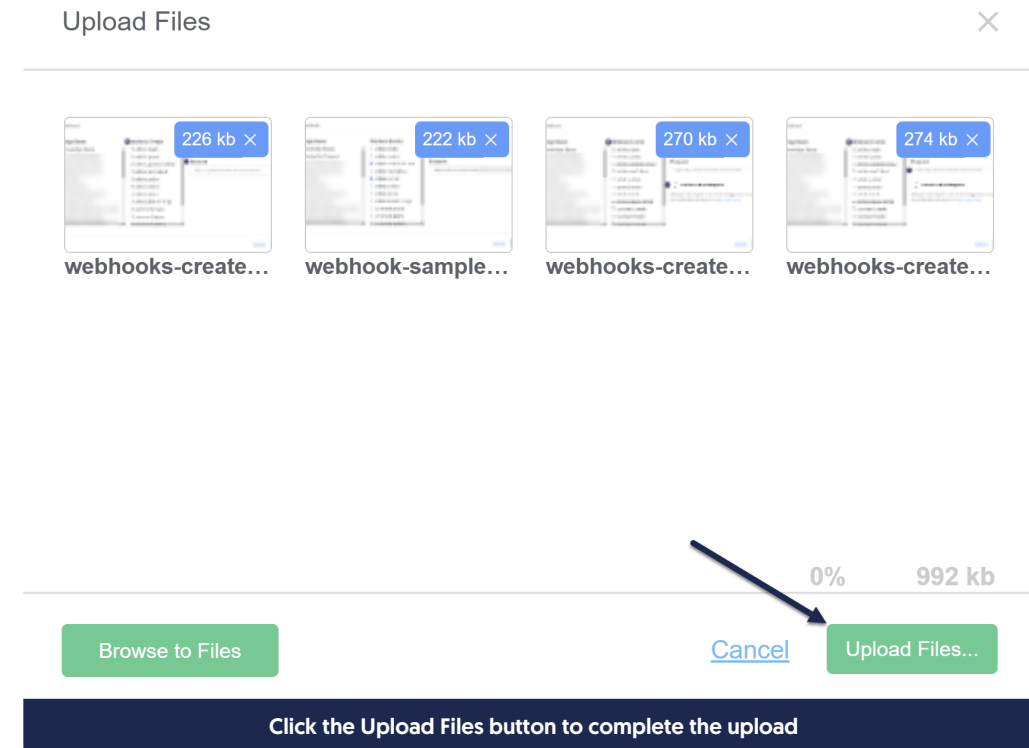
To add multiple images, videos, or files at once:

1. Go to **Library > Files**.

2. Click the **Add Files** button in the upper left.

   Files
   _____

   | + Add Files | Show Active Files ⌄   Filter by Labels ⌄   Show All File Types ⌄   settings-basic-article   🔍

   Edit   Bulk Label   🗑 Delete   Files per page: 20 50 100   Display Mode: ⊞ ☰

   Add Files button in File Library

3. This will open a pop-up where you can either drag files from your desktop/File Explorer into the pop-up, or click the button to **Browse Files,** navigate to the files you want to add, and open to add them.

Upload Files   ✕

Drag files here.

0%   0 kb

Browse to Files   Cancel   Upload Files...

Drag files to the popup where it says "Drag files here" or click Browse to Files to open a window

4. Once you've added the files you'd like to upload, click the **Upload Files** button in the lower right.

Upload Files   ✕

| 226 kb ✕ | 222 kb ✕ | 270 kb ✕ | 274 kb ✕ |

webhooks-create…   **webhook-sample…**   **webhooks-create…**   **webhooks-create…**

0%   992 kb

Browse to Files   Cancel   Upload Files...

Click the Upload Files button to complete the upload

Edit and update files in the File Library

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.
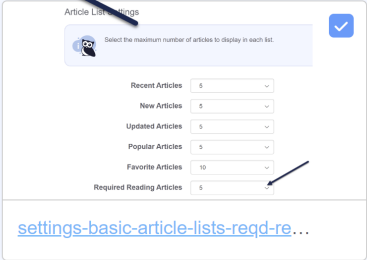
If you'd like to edit this to something more human-friendly or search-friendly:
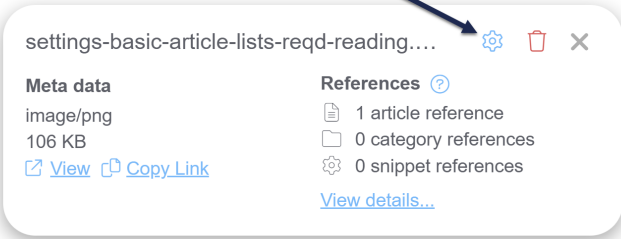
1. Go to **Library > Files.**

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.

Files

[+ Add Files]   [Show Active Files ⌄]   [Filter by Labels ⌄]   [Show All File Types ⌄]

Edit   Bulk Label   🗑 Delete

settings-basic-article-lists-reqd-re…

settings-basic-article-lists-reqd-reading….   ⚙ 🗑 ✕

Meta data   **References** ❓
image/png   📄 1 article reference
106 KB   📁 0 category references
🔗 View   📋 Copy Link   ⚙ 0 snippet references
                                       View details...

Edit the file by clicking the Edit link at the top or the gear cog icon in the metadata pop-up

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.

Edit File ✕

Articles may take an hour to reflect a file change. You may need to hard refresh and/or clear your cache to view the updated file. If the file still does not update, please contact support.

Article List Settings

Select the maximum number of articles to display in each list.

Recent Articles	5
New Articles	3
Updated Articles	3
Popular Articles	3
Favorite Articles	10
Required Reading Articles	5

File Name

settings-basic-article-lists-reqd-reading.png

File URL

https://dyzz9obi78pm5.cloudfront.net/app/image/id/651f126f83c46c6475236af0/n/settings-basic-article-lists-reqd-reading.png

File Labels

Type label name and hit enter or tab..

Upload New File   Cancel   Save File

Edit the File Name and then Save File

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:

Select file and click one of the two Edit links

5. This will open the **Edit File** pop-up.

6. Click the **Upload New File** button in the lower left.
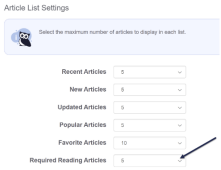

Upload New File button

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

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:

Files

+ Add Files

Show Active Files ⌄

Edit   Bulk Label   🗑 Delete

Article List Settings

Select the maximum number of articles to display in each list.

Recent Articles	5 ⌄
New Articles	5 ⌄
Updated Articles	5 ⌄
Popular Articles	5 ⌄
Favorite Articles	10 ⌄
Required Reading Articles	5 ⌄

settings-basic-article-lists-reqd…

settin

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:**

☐ **Name**	**References**
☑ settings-basic-article-list-settings-numbered.png	📄 1 article reference 📁 0 category references ⚙ 0 snippet references View details...

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.**

Files

	Name	References	Labels	Type	Size	Date Created	Last Modified
☑	settings-basic-article-list-settings-numbered.png	📄 1 article reference 📁 0 category references ⚙️ 0 snippet references View details...		PNG	89 KB	09/06/2022 4:04pm	12/23/2022 1:12pm
☐	settings-basic-article-lists-reqd-reading.png	📄 1 article reference 📁 0 category references ⚙️ 0 snippet references View details...		PNG	106 KB	10/05/2023 3:45pm	10/05/2023 3:45pm

The metadata opens in a pop-up at the bottom of the page

5. Click the **Copy Link** link to copy the URL to your clipboard.

Click the Copy Link link to copy the file's URL to your clipboard

File references

Any time a file is used, we track the reference so that you know whether it's safe to delete that file.

This will track references within the **same knowledge base** that the file is stored in; if you have multiple knowledge bases, it will not track references to the file in other knowledge bases! We recommend adding a **file label** or some other method to alert yourself not to delete files referenced by other KBs.

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**
  - ○ **Knowledge Base > Home Page**

The file references will update once you save changes on any of these pages.

You can view the file references in Library > Files in two places:

- ● **In the Thumbnail View, when you click on an individual file, the references are displayed in the file metadata displayed at the bottom of the page:**
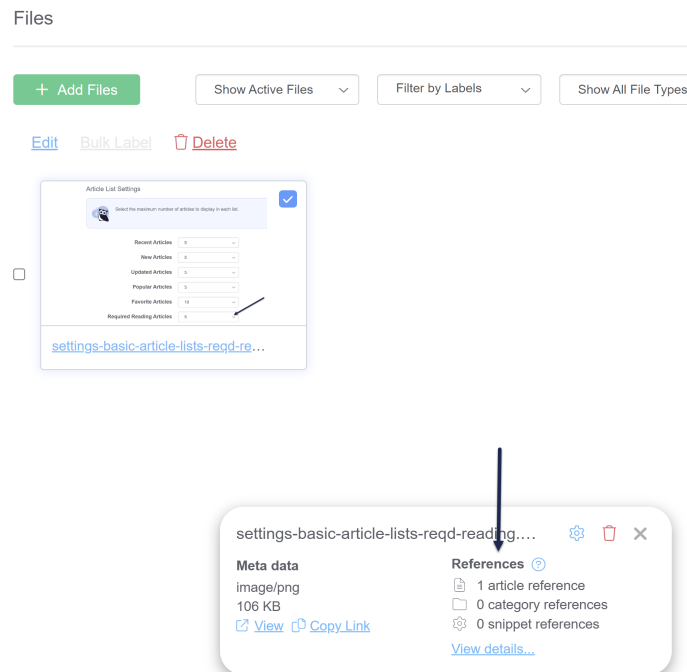
- ● **In the List View, References is included as its own column . Selecting an individual file in this view will also display the references in the file metadata at the bottom of the page:**

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.
- **Category References**: Contains references within category description, icon, URL redirect, etc.
- **Snippet References**: Contains references within snippet body.
- **Other References**: Contains references within **Knowledge Base > Home Page**.

Here's a sample showing references in all areas:

References   ✕

ⓘ Places where this file is being used within the body of an article or category.

Theme References:
🖌 Body
🖌 Logo

Article References:
📄 WTD Proposal 2021
📄 WtD Newsletter copy

Category References:
📁 Test Default cat

Snippet References:
📄 Footer

Other References:
🖥 Home Page

[**Sample View details references list**]

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!

> This will track references within the **same knowledge base** that the file is stored in; if you have multiple knowledge bases, it will not track references to the file in other knowledge bases! We recommend adding a **file label** or some other method to alert yourself not to delete files referenced by other KBs.

Restoring deleted files

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.**
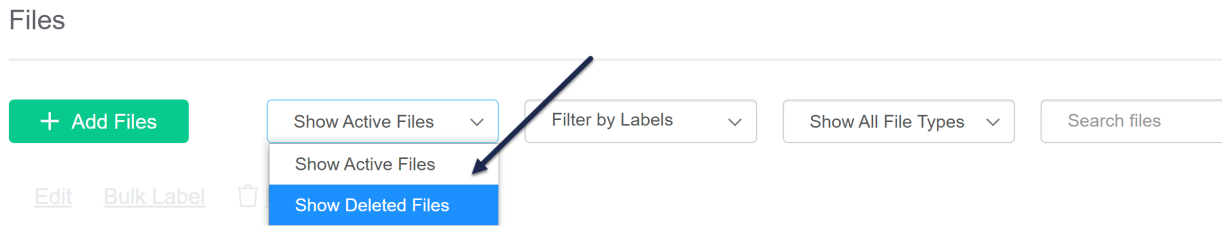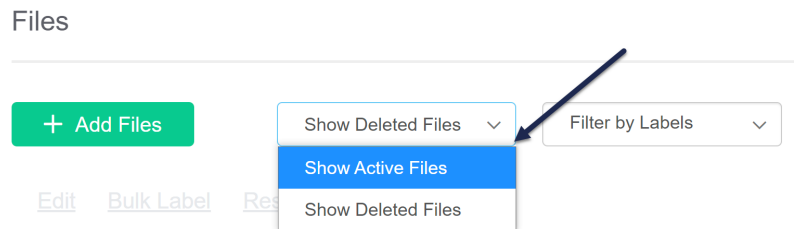

3. **This will display all deleted files in your File Library, with the most recently deleted listed first. You can use the other dropdown filters or the search to locate the file(s) you'd like to restore.**

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.**

Files

+ Add Files

Show Deleted Files ⌄   Filter by Labels ⌄   Show All File Types ⌄

Edit   Bulk Label   Restore

file-library-select-file-edit.png

file-library-edit.png ✓

file-library-list-view-relea...

file-library-file-URL.jpg

-files.jpg

file-library-edit.png   ⚙ ✕

Meta data   **References** ?

image/png   📄 2 article references
510 KB   📁 0 category references
                         ⚙ 0 snippet references

⬈ View ⧉ Copy Link

View details...

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.**

The following files will be restored: ✕

- clinical-home.jpg
- named-test.png
- bird-2903388_1280-test.jpg

Cancel   OK

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~~   ~~Res~~

Purge and fully remove files

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

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

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**.
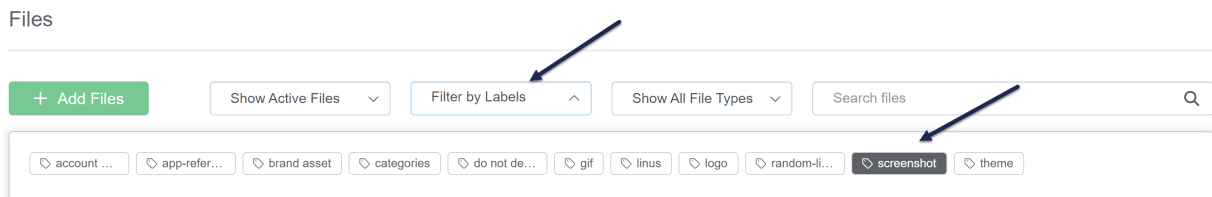
2. Click the **Filter by Labels** dropdown.

Files

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":
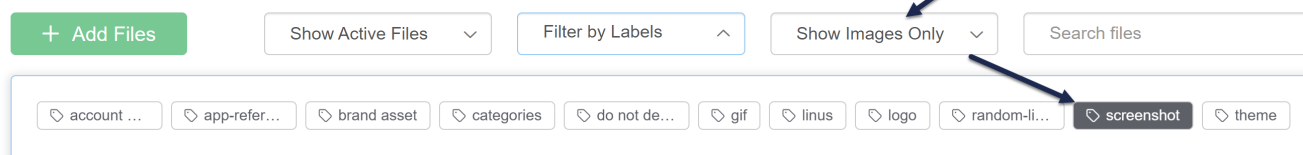
Sample filter with "screenshot" label selected

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?

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.