File Labels

**Last Modified on 04/03/2024 12:54 pm EDT**

Use file labels to filter the files you've uploaded to your knowledge base.

What are file labels?

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.
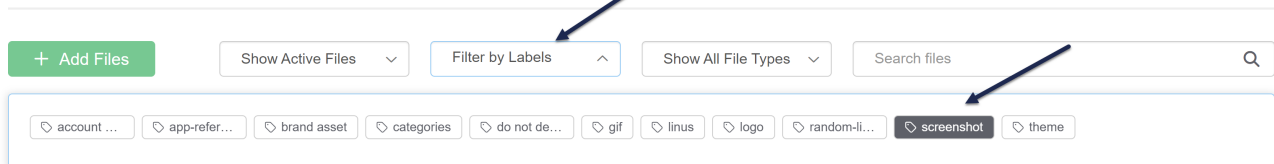
Common uses for file labels include:
- The relevant feature, functionality, geographic region, policy, procedure, etc. for a given file (e.g. we have file labels for "icons" for the various icons we use in our knowledge base and for some of our prominent features)
- The file's owner (we've seen this 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

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.
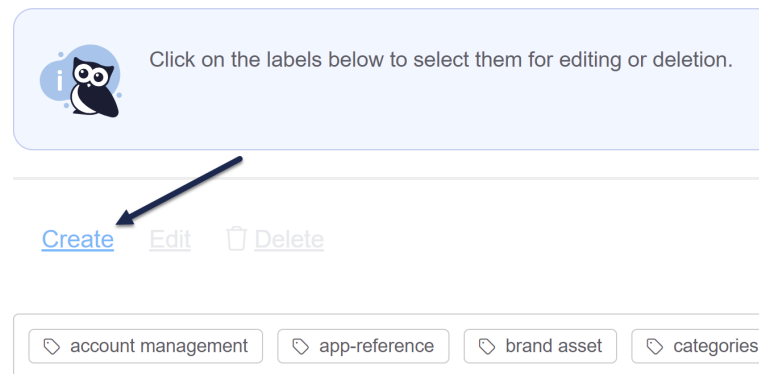
Create file labels in File Label Library

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.**

File Labels

Click on the labels below to select them for editing or deletion.

Create   Edit   Delete

account management   app-reference   brand asset   categories

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:**

Create Label   ✕

Label name:

icons

Cancel   Create Label
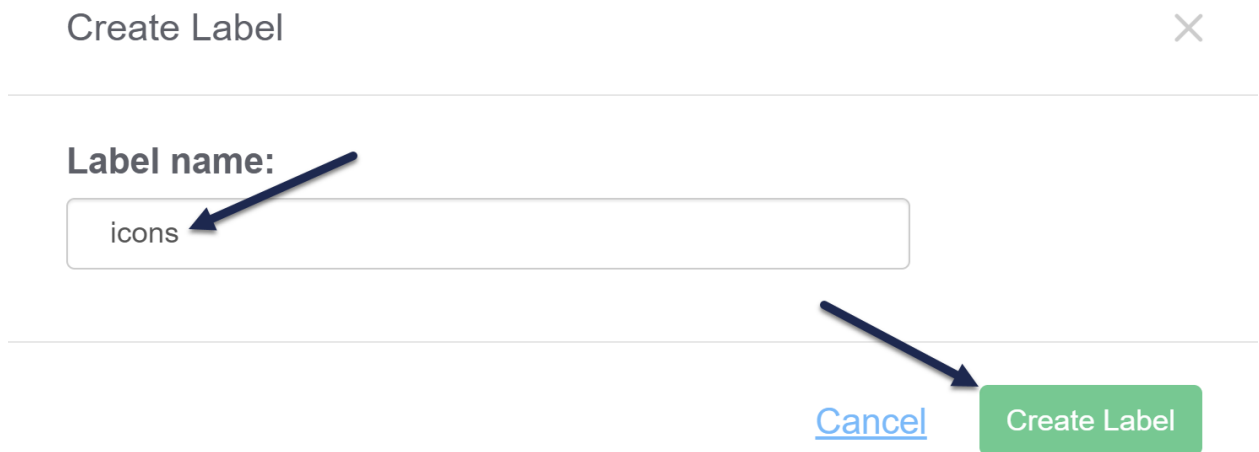
4. **Once you've finished editing the file label, click the Create Label button. The file label will be added to your library and immediately available for use.**

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:
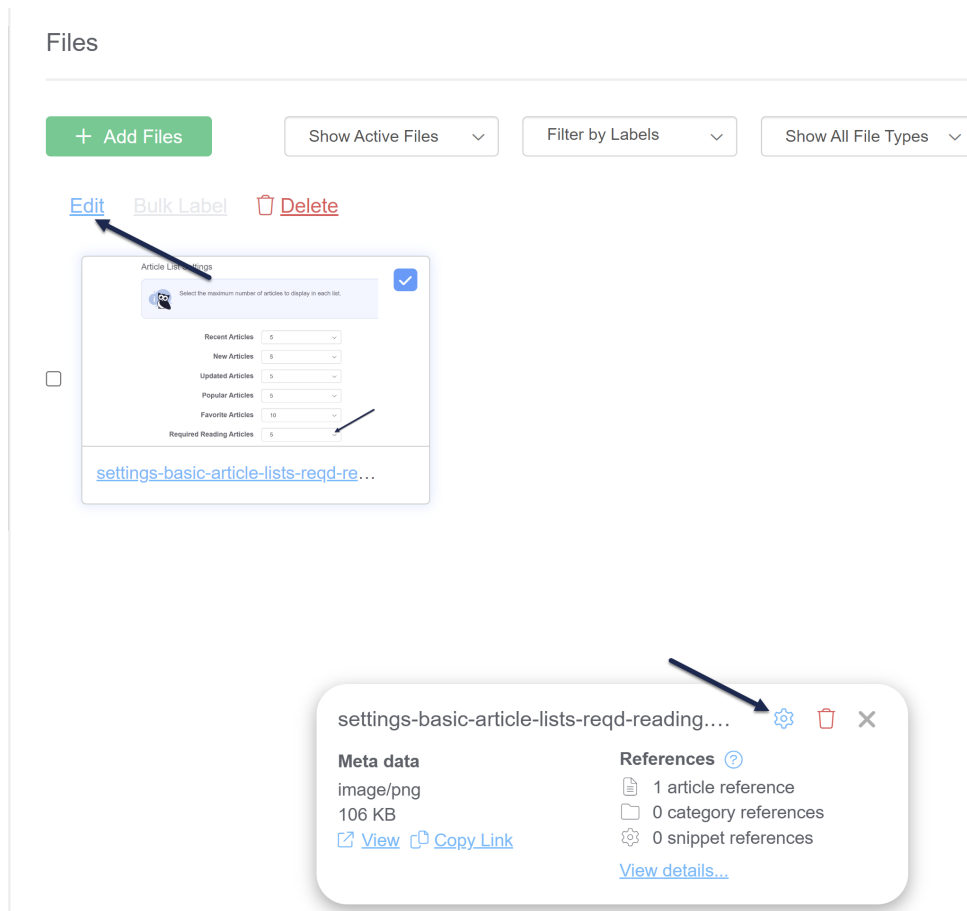
4. In the **Edit File** pop-up, type the name of the label you'd like to add in **File Labels.** Hit Enter or Tab once you're done typing the name.

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	5
Updated Articles	5
Popular Articles	5
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

🏷️ screenshot ✕   Type label name and hit enter or tab..

Upload New File   Cancel   Save File

Type the name of the new file label and hit Enter or Tab. then Save.

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

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.

File Labels

Click on the labels below to select them for editing or deletion.

Create   Edit   🗑 Delete

🏷 account management   🏷 app-reference   🏷 brand asset   🏷 categories

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.**

Edit Label   ✕

Label name:

managing account

Merge into different label   Cancel   Edit Label

Click Edit Label to save your changes to the label

6. **All files with this label will now display the updated name.**

Delete a file label

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.

Delete Labels   ✕

Are you sure you wish to delete these labels?

Cancel   OK

Click OK to confirm the deletion of the labelsyou selected
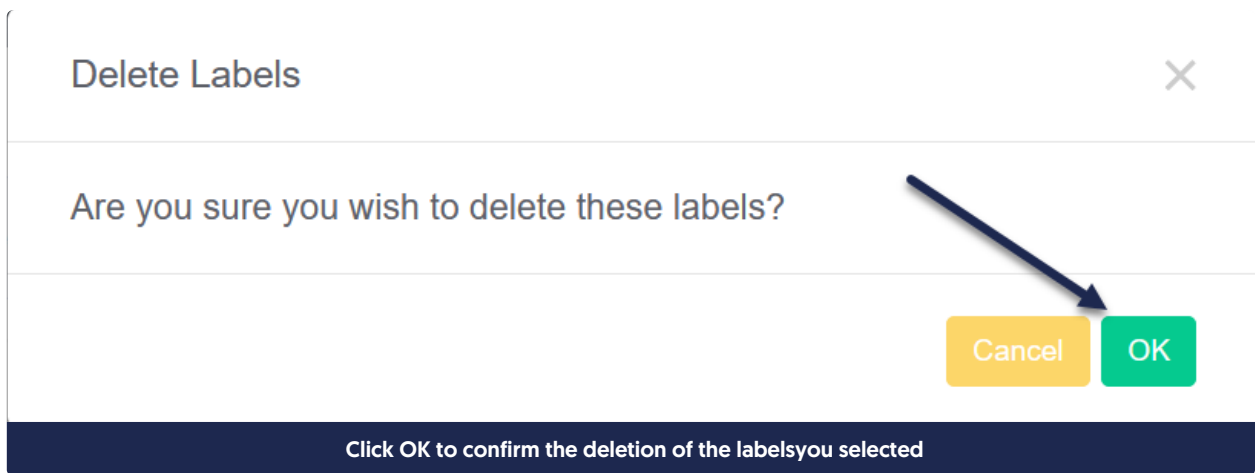
5. All the labelsyou selected will be deleted and removed from any files that referenced them.
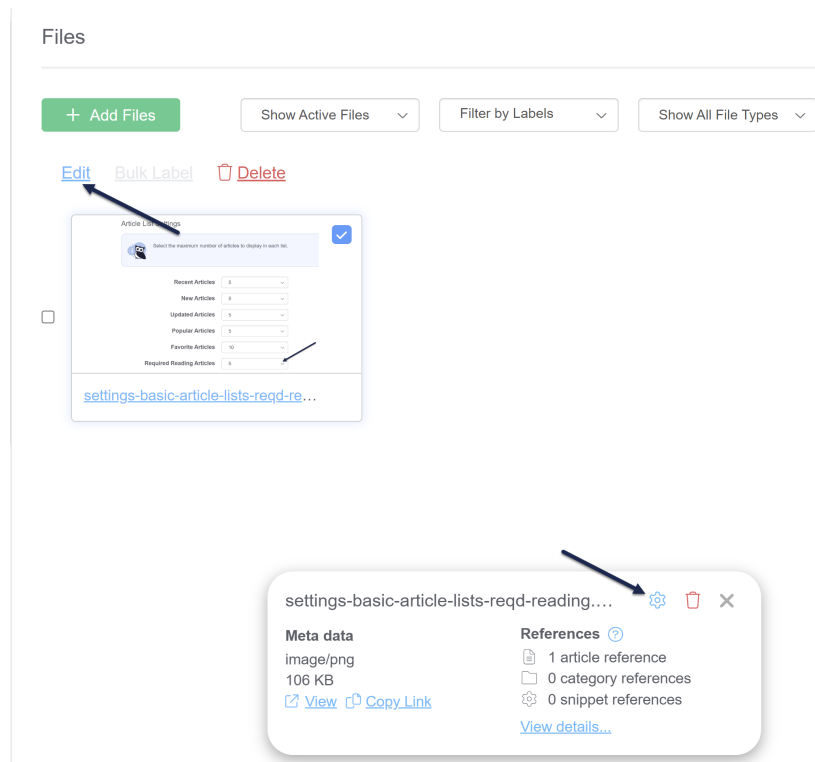
Add an existing label to a file

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:

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
                       ⚙ 0 snippet references
↗ View ⧉ Copy Link   View details…

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

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:

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
image/png
106 KB
🡕 View   ⧉ Copy Link

References ⓘ
📄 1 article reference
📁 0 category references
⚙ 0 snippet references
View details...

4. Click the x next to the label you'd like to remove.

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
New Articles
Updated Articles
Popular Articles
Favorite Articles   10
Required Reading Articles

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

🏷 screenshot ✕   Type label name and hit enter or tab.

Upload New File   Cancel   Save File

Click the X on the label you'd like to remove

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

Merge labels

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?
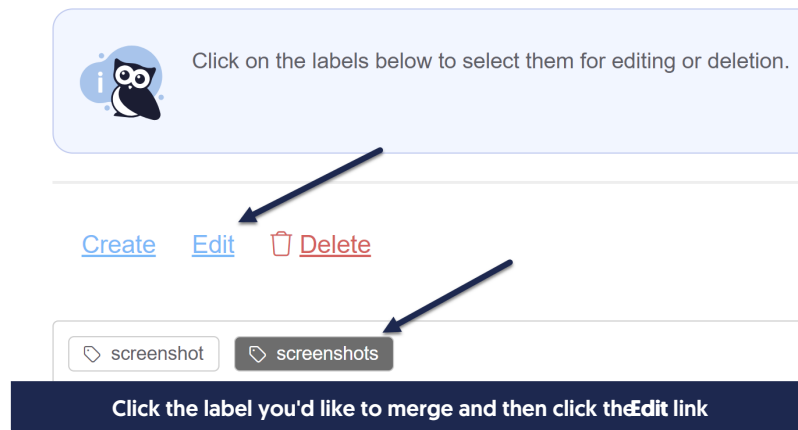
Users with our default **Editor** or **Writer** roles, or those with custom roles who have permission to both edit and delete file labels have the option to merge two labels together.

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.
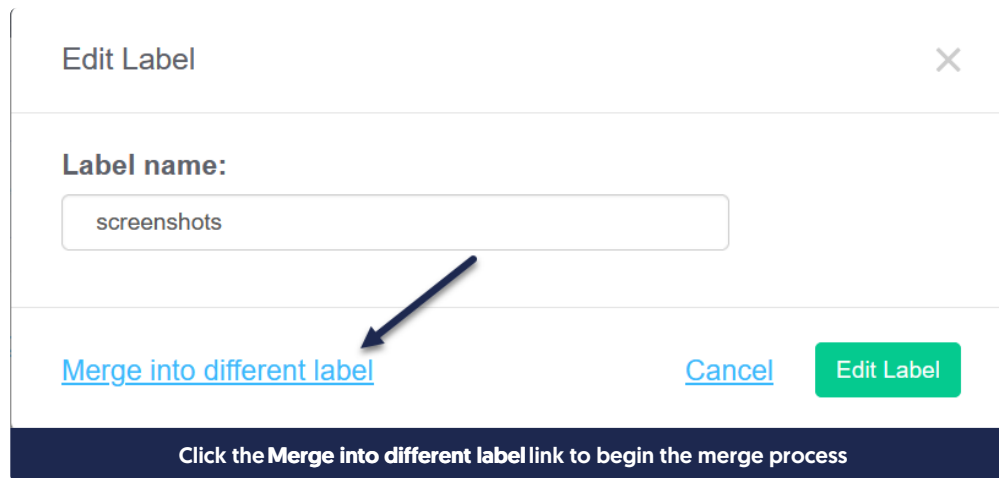
To merge labels:

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.

File Labels

Click on the labels below to select them for editing or deletion.

Create   Edit   🗑 Delete

🏷 screenshot   🏷 screenshots

Click the label you'd like to merge and then click 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.

Edit Label   ✕

Label name:

screenshots

Merge into different label   Cancel   **Edit Label**

Click the Merge into different label link to begin the merge process

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.

Merge Label

Current label:

screenshots

Merging will replace and delete this label.

New label:

screenshot

Current label will be replaced by new label.

Back to edit   Cancel   Merge Label

Add the label you'd like to merge the current label into

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.

Merge Tags

Current tag:

SSL cert

Merging will replace and delete this tag.

New tag:

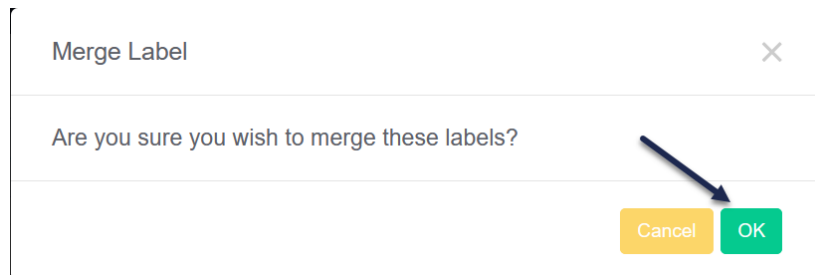ssl certificate

Current tag will be replaced by new tag.

Back to edit   Cancel   Merge Tags

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.
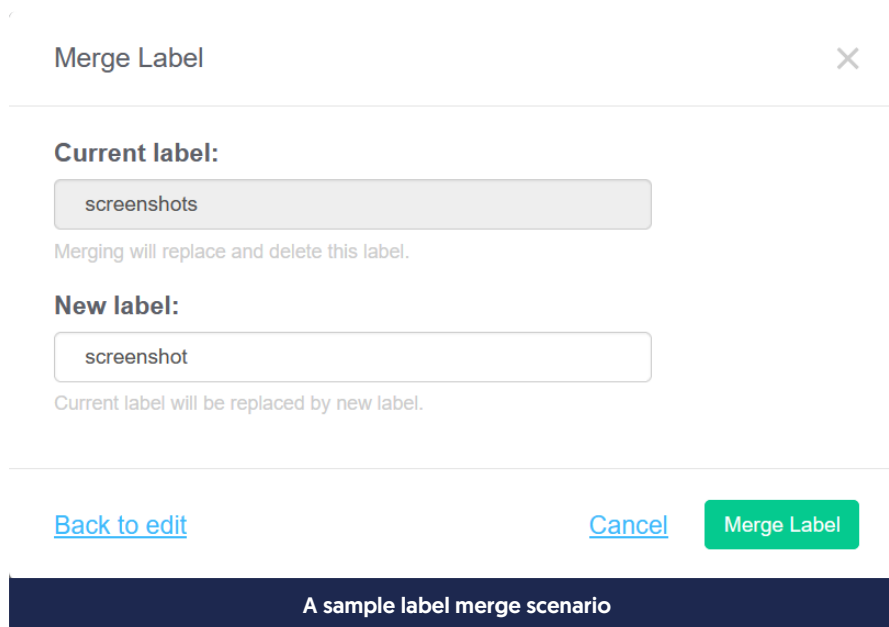
What does merging labels do?

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

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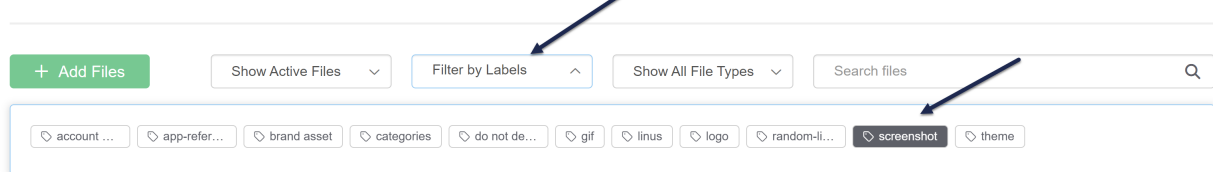
2. Click the **Filter by Labels** dropdown.
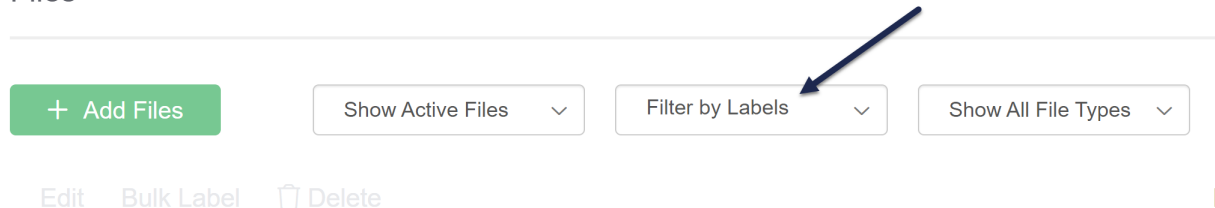
Click the Filter by Labels dropdown

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.

Files

+ Add Files

Show Active Files ⌄ | Filter by Labels ⌃ | Show Images Only ⌄ | Search files

account … | app-refer… | brand asset | categories | do not de… | gif | linus | logo | random-li… | **screenshot** | theme

Sample filter, only Image files with the "screenshot" label will be displayed