



# Article settings

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Learn about article settings, statuses, and permissions, including: tags, internal notes, titles, group and team restrictions, and hiding and showing articles.

## Full and short titles

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

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](http://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** [custom author role 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:

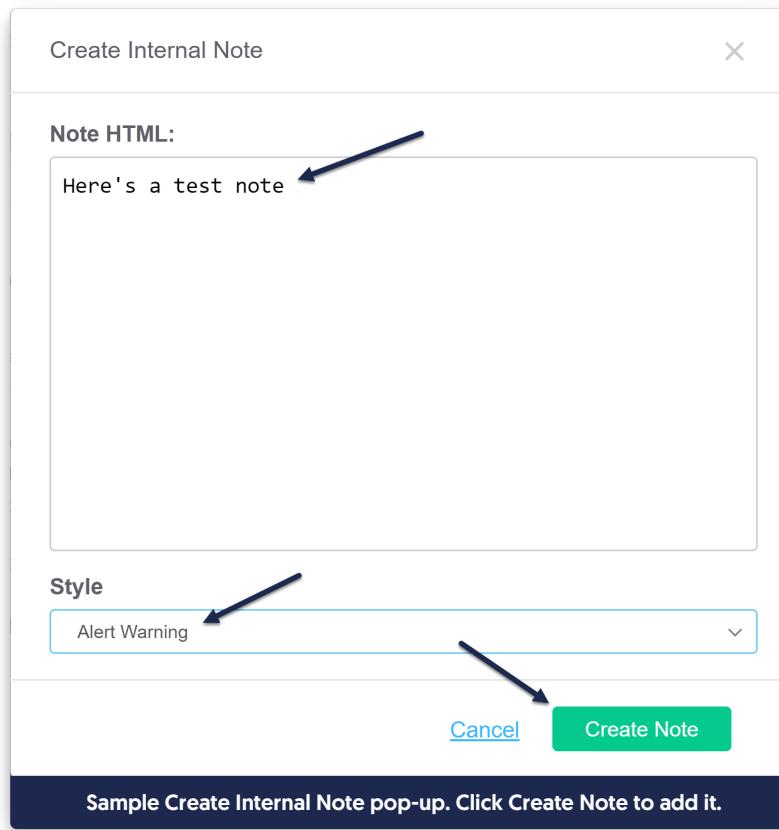


Full Article Title [Add Short Title](#) [Add Internal Note](#) [Add Internal Title](#)  
Internal notes

Switch Editor: [Legacy](#)

Click Add Internal Note

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.



Create Internal Note X

Note HTML:  
Here's a test note

Style  
Alert Warning

Cancel Create Note

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.

Full Article Title [Add Short Title](#)

[Add Internal Title](#)

Internal notes

[Edit Note](#) [Remove Note](#)

Here's a test note

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:

Full Article Title [Add Short Title](#)

[Add Internal Title](#)

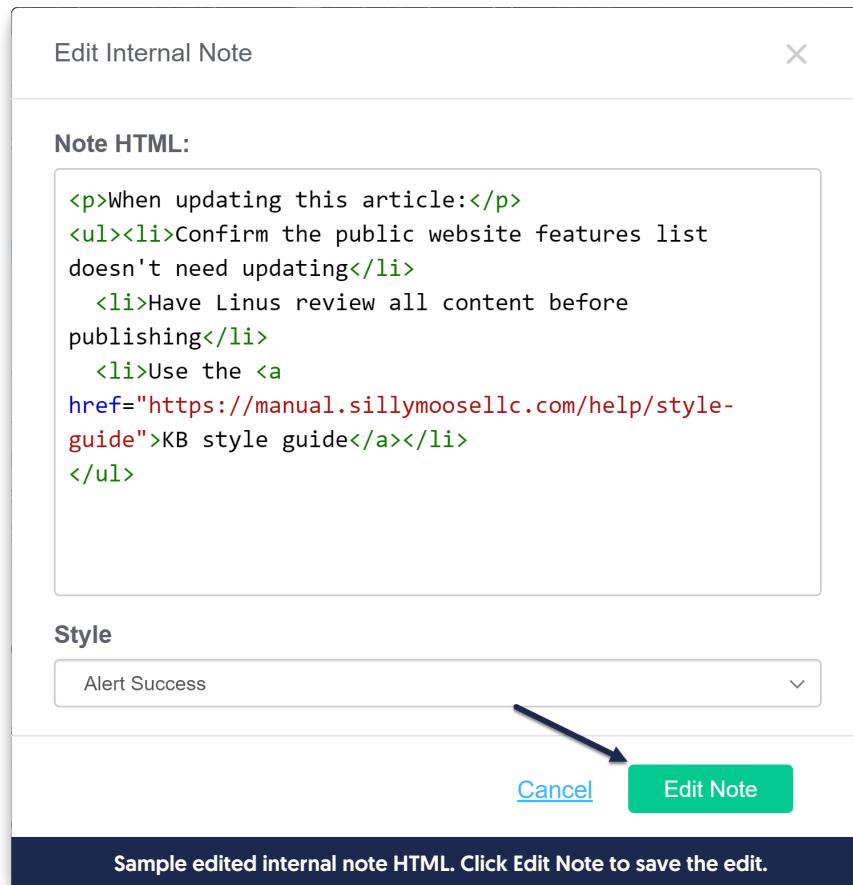
Internal notes

[Edit Note](#) [Remove Note](#)

Here's a test note

Click the Edit Note link

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.

Full Article Title [Add Short Title](#) [Add Internal Title](#)

Internal notes

[Edit Note](#) [Remove Note](#)

When updating this article:

- Confirm the public website features list doesn't need updating
- Have Linus review all content before publishing
- Use the [KB style guide](#)

Switch Editor: [Legacy](#)

Sample Internal Note displayed based on the HTML in the previous step

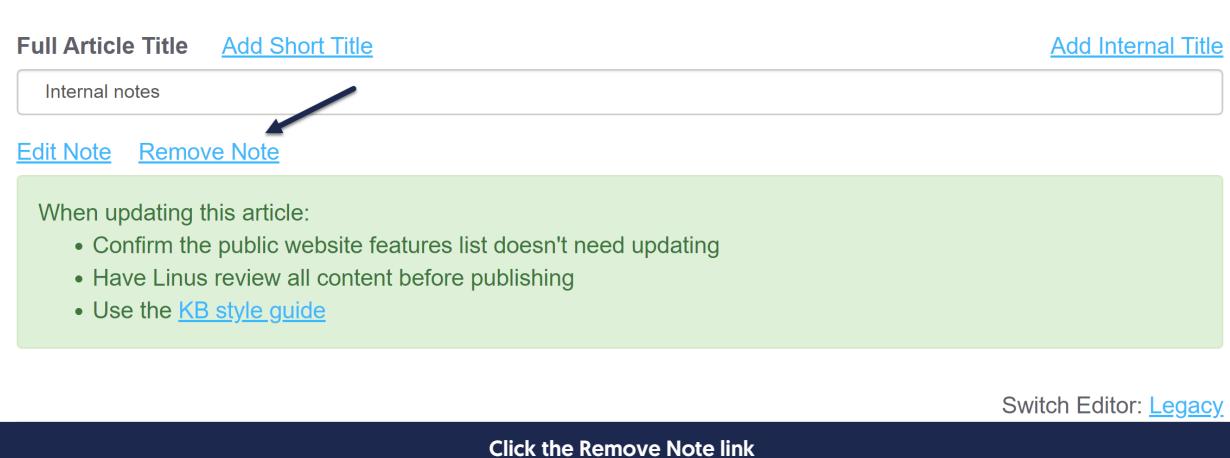
## Remove an internal note

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.

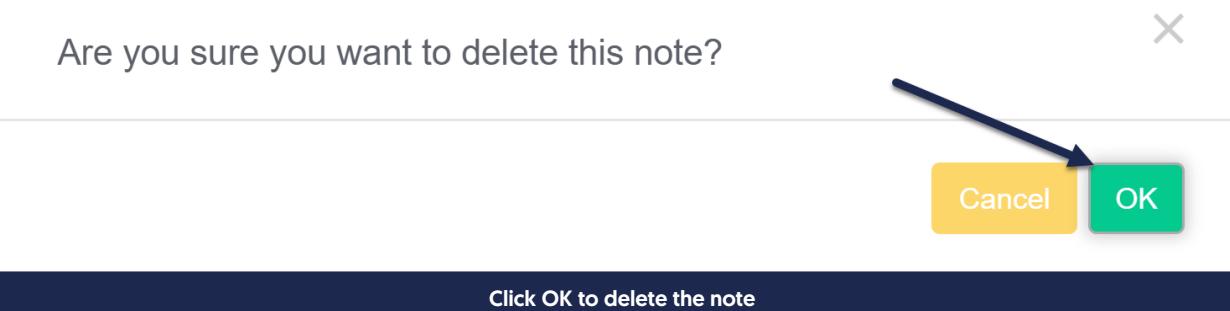
To delete an internal note completely:

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



The screenshot shows a 'Full Article Title' section with 'Add Short Title' and 'Add Internal Title' buttons. Below is a text area containing 'Internal notes' with an 'Edit Note' and 'Remove Note' link. A blue arrow points to the 'Remove Note' link. A green callout box contains instructions: 'When updating this article:' followed by a list: '• Confirm the public website features list doesn't need updating', '• Have Linus review all content before publishing', and '• Use the [KB style guide](#)'. At the bottom, a dark blue bar has the text 'Click the Remove Note link' and 'Switch Editor: [Legacy](#)'.

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



The screenshot shows a confirmation dialog box with the text 'Are you sure you want to delete this note?'. It includes a close button 'X' and two buttons: 'Cancel' (yellow) and 'OK' (green). A blue arrow points to the 'OK' button. A dark blue bar at the bottom has the text 'Click 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>`

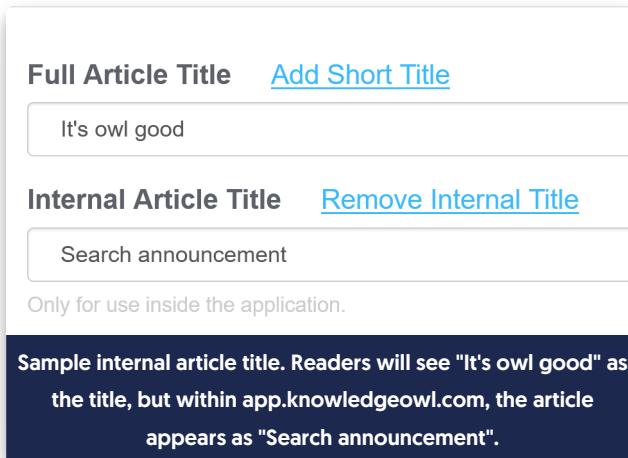
## Internal title

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](https://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](https://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

All articles have a status, which determines whether the article is viewable in your live knowledge base.

Change the publishing status using the Publishing Status dropdown and 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

Refer to the more detailed sections below on what each status means.

### 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:

- 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. To do so:
  1. Go to KB settings > Article editor.
  2. Under Article review, check the box to Automatically set articles to "Needs Review" if older than the below date.
  3. Use the dropdowns to select the time period. For example, select "6" in the first dropdown, and "Months" in the second, to set the time period to six months.
  4. Be sure to Save your changes.

Refer to [Article editor settings](#) for more information on these settings.

## 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:

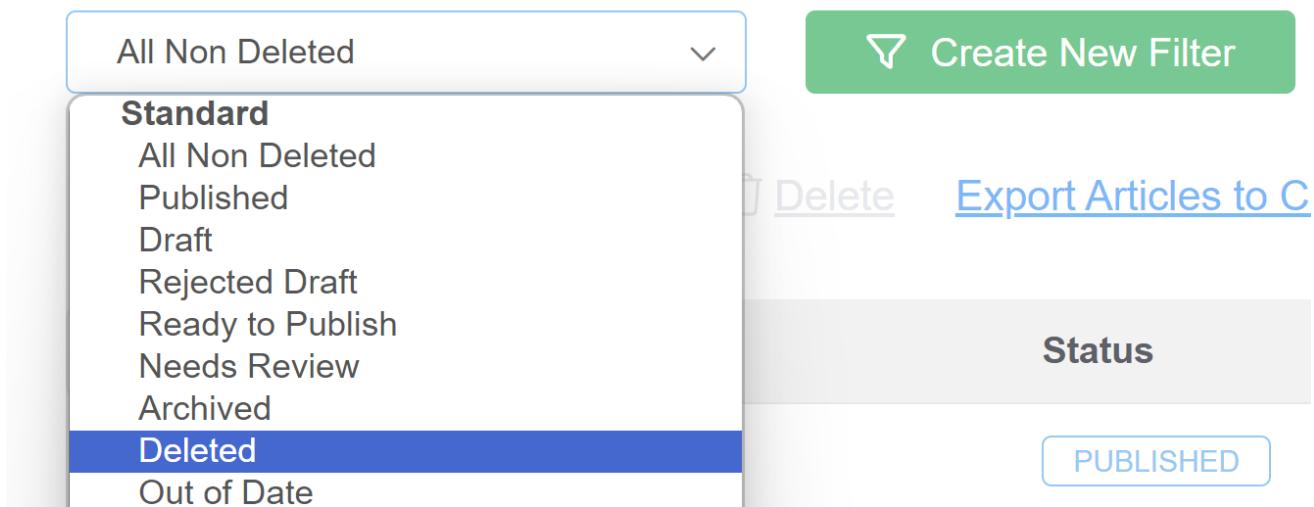


Check the box and then search for the article you'd like your readers to be redirected to. (If you don't do this, they'll likely just get a 404 page instead.)

## Deleted

Deleted articles are not visible in your knowledge base. You can only access them by navigating to **Manage > Deleted**. Refer to [Recover a deleted article](#) if you need to recover an article that was incorrectly deleted!

## Manage Articles



All Non Deleted

**Standard**

- All Non Deleted
- Published
- Draft
- Rejected Draft
- Ready to Publish
- Needs Review
- Archived
- Deleted**
- Out of Date

Delete Create New Filter Export Articles to C...

Status

PUBLISHED

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 your readers to be redirected to. (If you don't do this, they'll likely just get a 404 page instead.)

## Published date

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

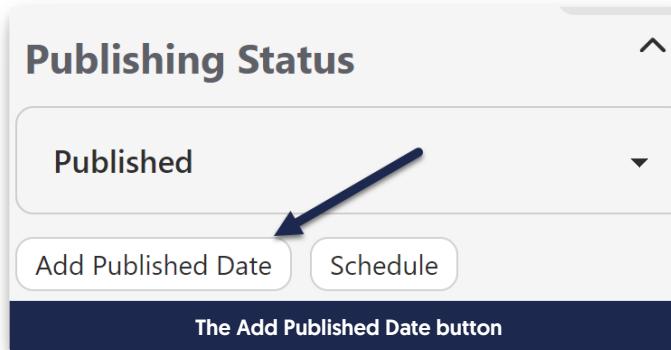
The published date is displayed:

- 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")]`

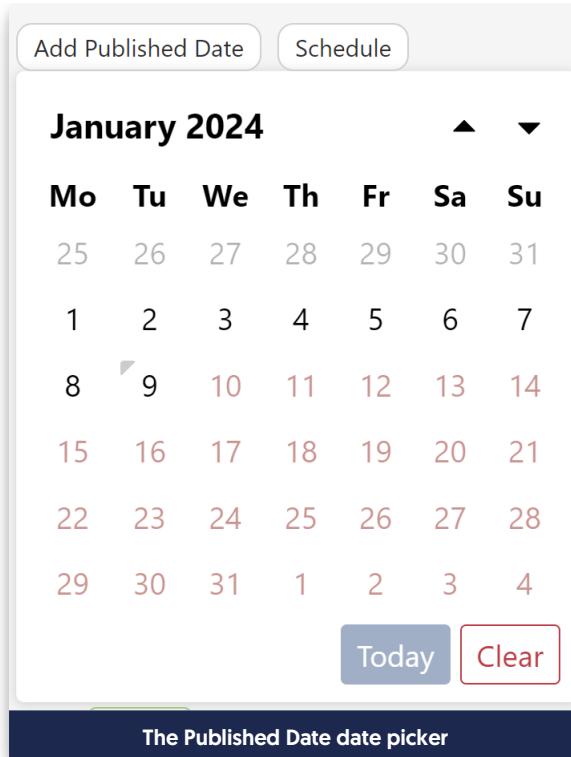
The Published Date is automatically set if you use the [Schedule an article to be published](#) feature.

To add a Published Date to an article:

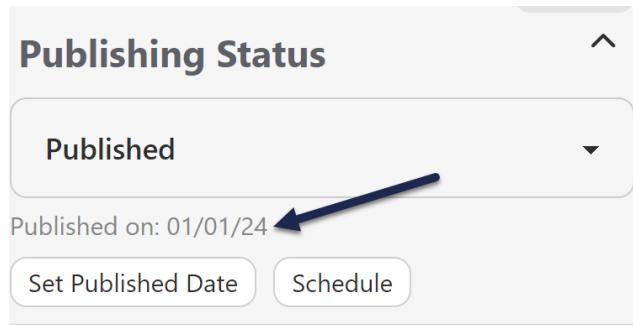
1. Open the article in the editor.
2. Select the Add Published Date option underneath the Publishing Status.



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.

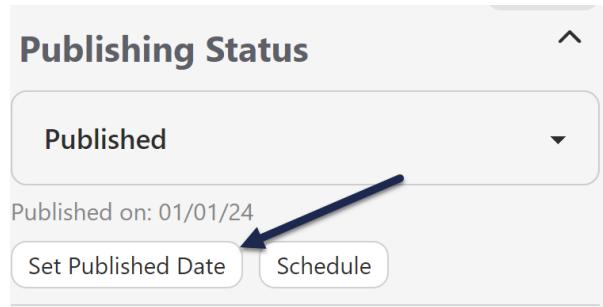


5. Be sure to Save changes to your article so the date fully updates!

### Change or remove a Published Date

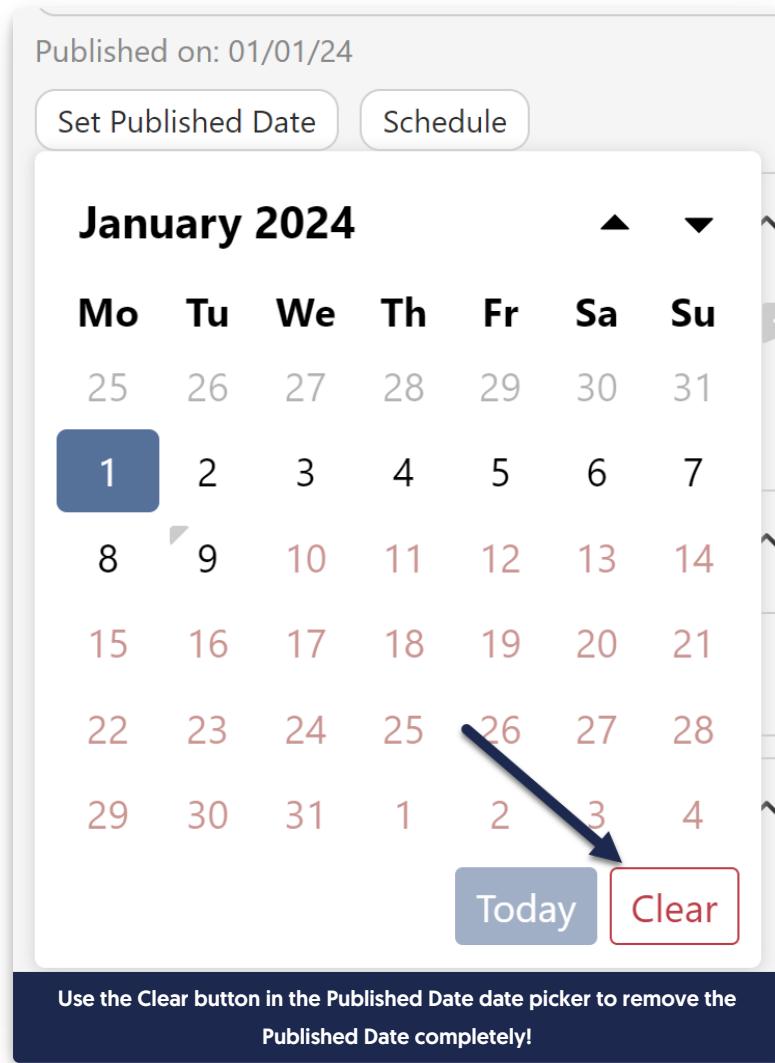
If you already have a published date added to an article, you can change it or remove it completely by clicking on the Set Published Date option:

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

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

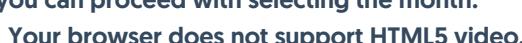
To schedule an article for publication:

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.)

Select Schedule > To be published

A calendar picker opens where you can complete your scheduling details.

4. 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:  

  - 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. Then you can proceed with selecting the month:  

5. Next, select the hour you'd like to publish the article. Publication generally occurs 10-15 minutes after the selected hour in the displayed time zone. The time zone displayed and used depends on the **Timezone** set for your knowledge base in **KB settings > Basic**.
  - a. To switch between AM or PM, select the lowercase **am** or **pm** in the upper right corner of the picker:  


6. Once you've finished making your selections, select **Schedule** to finalize the schedule.
7. 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

8. 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` will log 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

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:

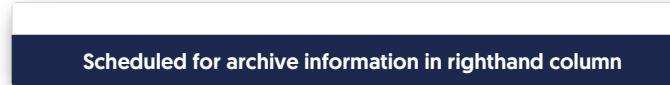
- An alert across the top of the editor letting you know what/when they've been scheduled.
- The scheduled date/time and an option for you to remove them from the schedule in the righthand column of the editor.

## 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**.  
A calendar picker opens where you can complete your scheduling details.
4. 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:  
  
Your browser does not support HTML5 video.
  - 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. Then you can proceed with selecting the month:  
  
Your browser does not support HTML5 video.
5. Next, 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. The time zone displayed and used depends on the **Timezone** set for your knowledge base in **KB settings > Basic**.
  - a. To switch between AM or PM, select the lowercase **am** or **pm** in the upper right corner of the picker:  

6. Once you've finished making your selections, select **Schedule** to finalize the schedule.
7. 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
8. The righthand column also shows the scheduled archival 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. Refer to [Publishing status](#) for more details on the Archived status.
- The article will no longer be available in your live knowledge base.
- The Last Modified date will update when the schedule has run.
- If you use [webhooks](#), the `article.statuschange` and `article.archive` will log the change.

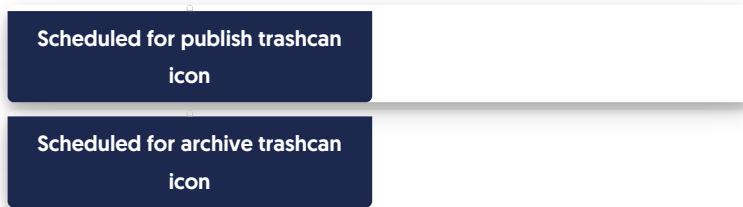
## Edit or remove an article's scheduled publication or archival

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)

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:

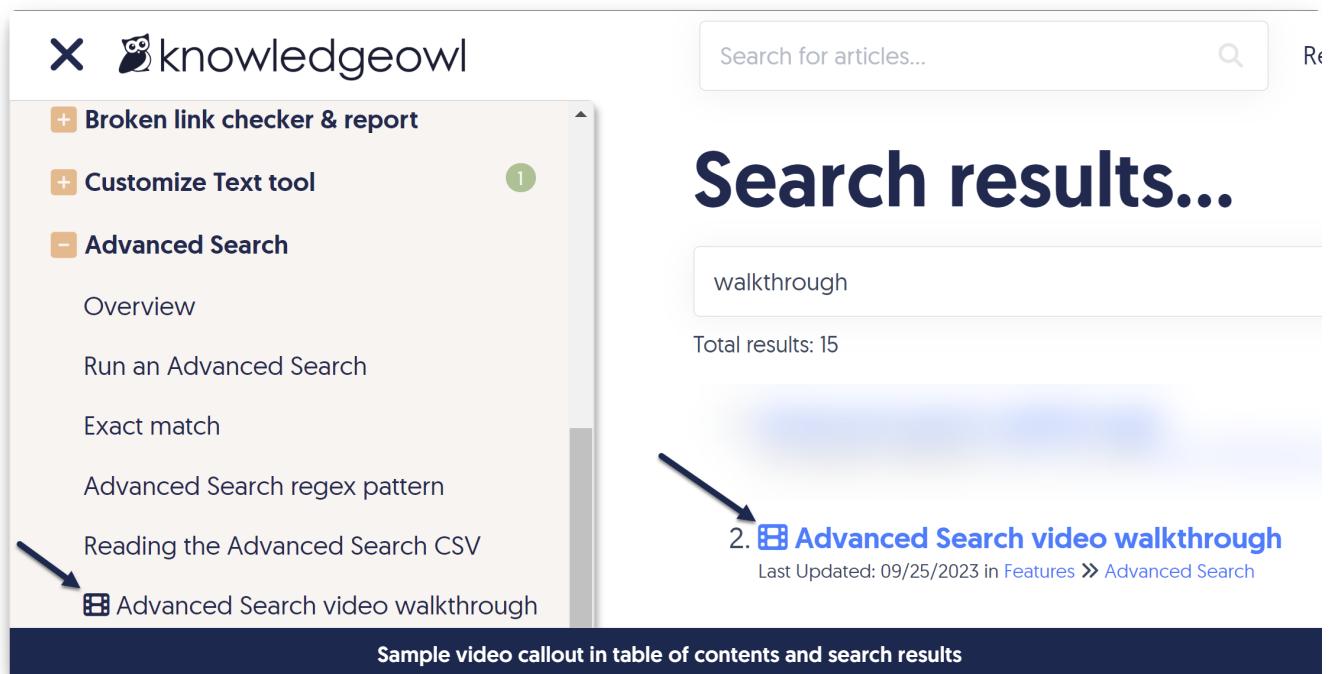
- **Video Content:** Used to identify articles that contain video content. This callout doesn't expire.
- **New callout:** Used to identify Newly published articles. This callout is automatically removed once the expiration date passes.
- **Updated callout:** Used to identify recently updated articles. This callout is automatically removed once the expiration date passes.

Refer to the linked sections below for examples of what the callouts look like.

### Video Content callout

The Video Content callout adds a video icon to the left of the article title.

It displays until you manually remove it. It displays everywhere the article title is used, including the table of contents, search results, category landing pages, and article lists:



The screenshot shows the KnowledgeOwl interface. On the left, there's a sidebar with various tools: 'Broken link checker & report', 'Customize Text tool', and 'Advanced Search'. Under 'Advanced Search', there are several options: 'Overview', 'Run an Advanced Search', 'Exact match', 'Advanced Search regex pattern', 'Reading the Advanced Search CSV', and 'Advanced Search video walkthrough'. A blue arrow points from the text 'Sample video callout in table of contents and search results' to the 'Advanced Search video walkthrough' link. On the right, the main area is titled 'Search results...' and shows a search for 'walkthrough'. It displays 'Total results: 15' and a list of results, with the second result being '2. Advanced Search video walkthrough'. A blue arrow points from the text 'Sample video callout in table of contents and search results' to this result. A dark blue bar at the bottom of the sidebar contains the text 'Sample video callout in table of contents and search results'.



#### Combine video with other callouts

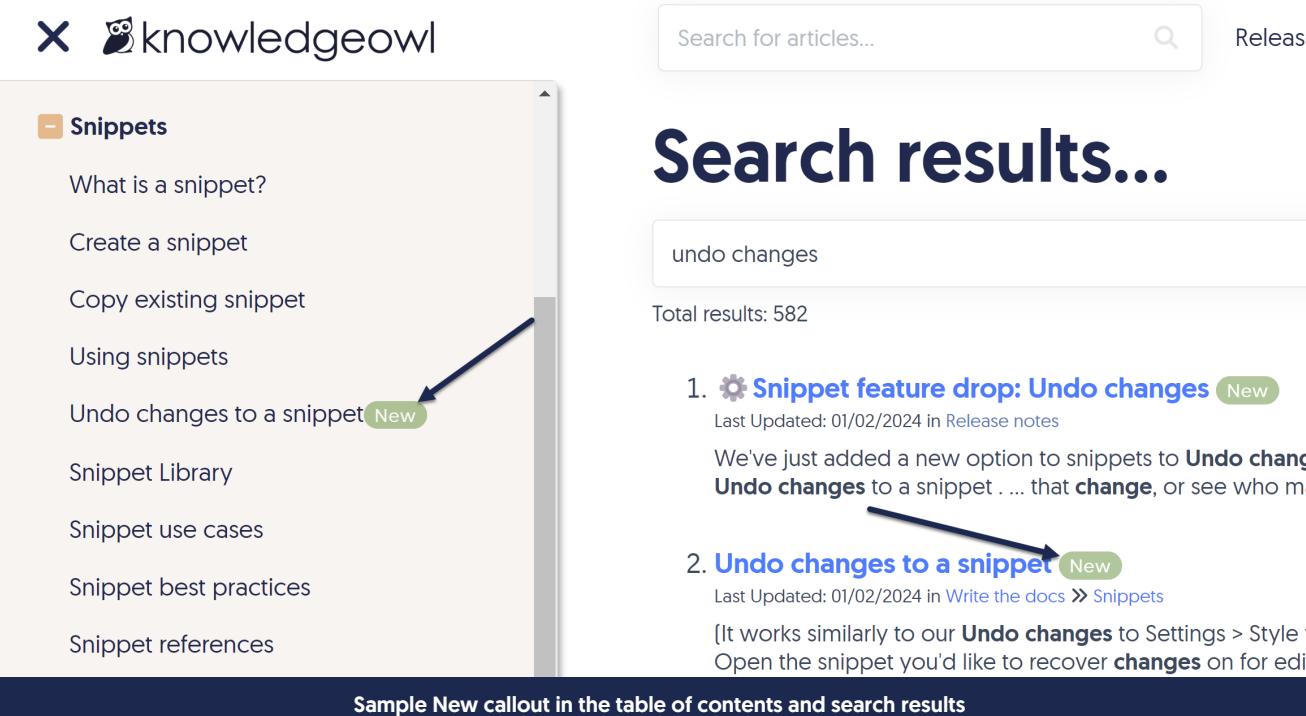
The Video Content callout can be checked in addition to any one of the **No Status**, **New** and **Updated** callouts.

## New callout

The New callout adds a green "New" badge next to the article title. It displays to the right of the title in the table of

contents and search results and to the left of the title in the New articles list.

It will automatically be removed after the expiration date. If you're using [Subscriptions](#), this callout will trigger a Subscription notification email.



The screenshot shows the KnowledgeOwl interface. On the left, there is a sidebar with a navigation menu under the heading 'Snippets'. The menu items include: 'What is a snippet?', 'Create a snippet', 'Copy existing snippet', 'Using snippets', 'Undo changes to a snippet' (which has a green 'New' badge), 'Snippet Library', 'Snippet use cases', 'Snippet best practices', and 'Snippet references'. A blue arrow points from the 'New' badge on the sidebar to the 'New' badge on the search results page. The main content area is titled 'Search results...' and shows a list of results. The first result is '1. ⚙️ Snippet feature drop: Undo changes' (with a green 'New' badge). A blue arrow points from the 'New' badge on the sidebar to the 'New' badge on this result. The result card includes a 'Last Updated' timestamp and a brief description: 'We've just added a new option to snippets to Undo changes to a snippet ... that change, or see who made the change'. The second result in the list is '2. Undo changes to a snippet' (with a green 'New' badge). The result card includes a 'Last Updated' timestamp and a brief description: '(It works similarly to our Undo changes to Settings > Style if you open the snippet you'd like to recover changes on for edit)'.

Sample New callout in the table of contents and search results

Sample New callout in an article list

### Updated callout

The Updated callout adds a blue "Updated" badge next to the article title. It displays to the right of the title in the table of contents and search results and to the left of the title in the New articles list.

It will automatically be removed after the expiration date. If you're using [Subscriptions](#), this callout will trigger a Subscription notification email.

The screenshot shows the KnowledgeOwl interface with a sidebar and a main content area. The sidebar on the left is titled 'articles' and contains a section for 'Article settings' with several options: 'Full and short titles', 'Internal note', 'Internal title', 'Publishing status', 'Schedule an article to be published' (with a 'Updated' button), 'Schedule an article to be archived' (with a 'Updated' button), 'Edit or remove an article's scheduled publication or archival' (with a 'Updated' button), 'Article callouts (New, Updated, and Video)', 'Display Settings' (with a 'Updated' button), and 'Automatically redirect when you'. A callout box labeled 'Sample Updated callout in the table of contents and search results' is overlaid on the sidebar, pointing to the 'Schedule an article to be archived' item. The main content area has a search bar at the top with the placeholder 'Search for articles...' and a magnifying glass icon. Below the search bar, the text 'Release n' is visible. The main title 'Search results...' is displayed in large, bold, dark blue text. A search term 'schedule' is entered in a search input field. Below the input field, the text 'Total results: 27' is shown. Three search results are listed: 1. 'How do I contact support?' (Last Updated: 06/06/2023 in Account and billing >> Company and product info). 2. 'Schedule an article to be archived' (Last Updated: 01/09/2024 in Write the docs >> Articles >> Article settings). 3. 'Schedule an article to be published' (Last Updated: 01/09/2024 in Write the docs >> Articles >> Article settings). Arrows from the 'Sample Updated callout in the table of contents and search results' box point to the 'Schedule an article to be archived' result in the search results list and to the 'schedule' term in the search input field.

articles

Article settings

Full and short titles

Internal note

Internal title

Publishing status

Schedule an article to be published Updated

Schedule an article to be archived Updated

Edit or remove an article's scheduled publication or archival Updated

Article callouts (New, Updated, and Video)

Display Settings Updated

Automatically redirect when you

Sample Updated callout in the table of contents and search results

schedule

Total results: 27

1. [How do I contact support?](#) Updated  
Last Updated: 06/06/2023 in [Account and billing](#) >> [Company and product info](#)  
If you need to **schedule** a support call with one of our owls, you support And if you're trying to figure out if KnowledgeOwl is

2. [Schedule an article to be archived](#) Updated  
Last Updated: 01/09/2024 in [Write the docs](#) >> [Articles](#) >> [Article settings](#)  
**schedule** in the editor. ... your **scheduling** details. ... hour arriv **scheduled** articles.

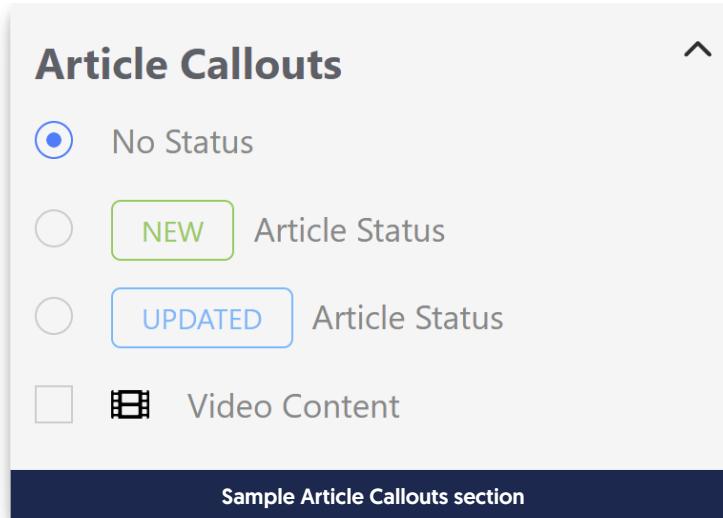
3. [Schedule an article to be published](#) Updated  
Last Updated: 01/09/2024 in [Write the docs](#) >> [Articles](#) >> [Article settings](#)  
your **scheduling** details. ... to **schedule** in the editor. ... The **sc** **schedule** in the righthand column

Sample Updated callout in an article list

## Add callouts

To add a callout to an article:

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



3. For New or Updated status, a **Status Expiration** date displays automatically added based on your knowledge base's settings. Once the status expires, the callout is automatically removed from the article.
  - o 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.

### Change 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 **KB settings > Article editor**.
2. Change the **Default article callout expiration** dropdowns to set the number and measure of your choice. (Options include numbers 1-12 and durations of days, weeks, or months.)
3. **Save** your changes.

This will update the default date that gets generated whenever a callout is added; authors can manually edit/override that date.

## Display Settings

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

When you change the permalink of an article, what happens when someone navigates to that old URL?

If you use the [Old Links](#) feature, they'll be seamlessly 301-redirected to the new URL. You have two options for using old links:

- Adding old links manually
- Turning on a setting that checks if you've changed the permalink and asks you if you want to add the old link

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

With this setting turned on, if you edit an article or category to change its permalink, when you **Save your changes**, you'll be prompted to add the permalink you just removed as an [Old Link](#) automatically. This saves you work and keeps your content redirecting smoothly.

This setting is turned on in new knowledge bases by default. If you have an older knowledge base, we recommend you use it too!

To turn it on:

1. Go to KB settings > Article editor.
2. Under Content editor, check the box to **Automatically prompt to create a redirect link when changing the content's current permalink**.
3. **Save your changes.**

With this turned on, once you edit a permalink in an article or category and **Save it**, a modal opens to ask if you'd like to add the previous permalink as an old link:



Sample permalink changed modal

If you select **Yes**, KnowledgeOwl automatically adds the old link for you.

If you select **No**, no old links are created.

## Redirect old articles to a new permalink

If you change the permalink of an article, anyone who's bookmarked the old link or has been given that old permalink in an email or marketing materials will receive a **404** error.

Instead of that unpleasant experience, use the article's **Old Links** to 301 redirect retired permalinks and articles to a new location. Refer to [Old Links use cases](#) for more detailed explanations of when you might want to use this feature.

You have two options for using old links:

- Turn on a setting so that when you change a permalink and save the article or category, we'll prompt you to automatically add the previous permalink as an old link. Refer to [Automatically redirect when you update an article's URL](#) for more information on this feature.
- Add old links manually: Refer to the instructions on this page.

### Manually add an Old Link

To manually add an Old Link:

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



Sample Old Links link

The **Redirect Links** modal opens.

3. Enter the **Old Permalinks** that should redirect to this new article. These should be relative permalinks, so they should only include the portion that comes after your knowledge base homepage. For example, if I'm setting up a redirect for `https://support/knowledgeowl.com/help/remove-home-page-title`, I'd enter `remove-home-page-title` as my **Old Permalink**.
4. Once you've finished entering your old permalinks, select **Update Redirects** button to save those redirects.
5. Save your article or category in the editor.

### Troubleshooting: Only valid URL slugs are allowed warning

The Redirect Links modal may display this warning:

Only valid URL slugs are allowed. Any invalid characters will be stripped upon save.

This warning means you entered a URL that contains unsupported permalink characters, which usually means you tried to enter a full URL instead of just the article permalink.

To resolve the warning, review the **Old Permalinks** you've entered and be sure they're using the article's **permalink only** (like `remove-home-page-title`) instead of the full URL (like <https://support/knowledgeowl.com/help/remove-home-page-title>).

## 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. Keep reading for more on this use case.
2. When you've updated an article's permalink due to title or content changes. Use the [Automatically redirect when you update an article's URL](#) setting to handle this use case!

### Replace 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.

For this type of Old Links use case, the old article you wan to redirect must be in some type of Draft, Archived, or Deleted publishing status. Refer to [Publishing status](#) to learn more about the available publishing statuses.

## Search phrases

Search phrases can help your readers discover your content. Use them as a way to add search words or phrases that don't already exist in the article body, title, permalink, or meta description.

## When to use search phrases

Search phrases are useful in the following situations:

- You want readers to find the article when they search for a phrase or term that doesn't occur in the content itself. If you have a word or phrase that has an equivalent synonym frequently, consider using the [Synonyms](#) feature for this use case.
- You want to "boost" a particular article to the top of the search results when a given word or phrase is searched. 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!). Add the phrase "owl taming" in the **Search Phrases** field in the "Introduction to owl taming" article only. It should bump to the top of the list.



### Save yourself work

You don't need to use search phrases if you're 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

To add a word or phrase as a search phrase:

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.

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

## Adding several search phrases at once

If you have a lot of search phrases you want to add to an article, paste in the full list of search phrases at once to save yourself time.

You'll need to have your search phrases in a comma-separated list, for example: `phrase 1,phrase 2,phrase3,phrase four`.

1. Open the article for editing.
2. Paste your comma-separated list of search phrases in the **Search Phrases** field.
3. Press **Enter** or **Tab** to add the phrases:

Your browser does not support HTML5 video.

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

## Title tags

A **title tag** is an HTML element that specifies the title of a webpage. They're one of the most powerful tools for Search Engine Optimization (SEO) for publicly available knowledge bases.

This is not the title of the article or category displayed at the top of the page--for that, we use the article or category's **Full Article Title**. The title tag isn't actually displayed on the page—instead, this HTML element is tucked into the "head" of the page, like this:

Title tags are found in the <head> of a webpage, in the <title> element.

If you don't enter an explicit Title Tag for an article or category, KnowledgeOwl automatically generates one, formatted as: Article Title | Knowledge Base Name

The title tag should be an accurate and concise description of a page's content, but it gets used in a few additional ways:

- Browsers display the title tag as the browser tab title/label when someone views the page.
- Search engines either use the full title tag or a truncated version of it to display in the Search Engine Results Page (SERP).
- Most social media platforms display either the full title tag or a truncated version of it when the page is shared.

This is a very small field that has a LOT of reach, and we strongly encourage you to use it for Search Engine Optimization (SEO) in publicly available knowledge bases!

## Add or edit a title tag

To add or edit a custom title tag to your article or category:

1. Open the article or category for editing.
2. Enter or update the **Title Tag**, located below the article body editor pane:  
□
3. Be sure to **Save** your changes.

## Tips for writing a good title tag

Here are a few tips to get the most out of your title tags:

1. Get into the habit of manually adding a title tag to your articles, so you become aware of it as a field you need to use.

2. Consistently use either **Sentence case** or **Title Case** for your title tag. This should match your style guide settings.
3. Write the title for a human, not for the search engine bots or crawlers. Your title tag should be descriptive and accurate and help readers know if they actually want to view the page.
4. Write a unique title tag for each article and category in your knowledge base.
5. Don't repeat the same keyword multiple times in a title tag.
6. When all else fails, match your article title. (Google and other search engines will sometimes rewrite your title tag; for some reason, having the title match the first Heading 1 on the page seems to decrease their tendency to do so.)
7. As you edit or update articles, especially when you update the actual title or substantively update the content, review your title tag.
8. Focus on keeping your title tags at 60 characters or less. Our editor allows you to add up to 100 characters, but pretty much every tool will truncate it down to around 55-60, so it's good to get into the habit of shortening it.



#### Let us help you be succinct

If you'd like to encourage yourself to write concise article titles, head to **KB settings > Domain**.

Under **SEO settings**, check the box to **Ensure that page titles do not exceed 55 characters** and

**Save.** 😊

9. To preview how your title tag will appear when it's used by a search engine, [moz.com](#) has a [Title Tag Preview tool](#) that's fairly useful.

## Learn more

Here are two additional resources to help you dig into title tags more:

- [moz.com's Title Tag](#)
- [ahrefs.com's How to Craft the Perfect Title Tag \(Our 4-Step Process\)](#)

And if you're working on SEO optimization, check out Kate's blog post [Knowledge base SEO tips for those of us who hate SEO](#).

## Meta descriptions

A **meta description** is an HTML element that briefly summarizes the content of a web page. Like the **title tag**, it's not actually displayed while you view the page—instead, this HTML element is tucked into the "head" of the page, like this:

Meta descriptions are found in the <head> of a webpage, in the <meta name="description"> element.

Social media platforms use the meta description as the text preview for your article or category, so like the title tag, it's a field that has a lot of reach. If you don't have a meta description, social media platforms generally just grab the first 150-ish characters they find.

Search engines will *often* use the meta description, but not always—sometimes they'll display a relevant fragment from the page based on the end-user's search query, instead.

KnowledgeOwl may use or display the meta description in a few places, too:

- **Search results order:** The meta description is one of the [Search fields](#) we automatically index, and you can adjust the [Search field weights](#) to increase or decrease how important it is. If you've
- **Search results:** Depending on how you've configured KB settings > Search and synonyms > Search page display > Meta description article blurbs, meta descriptions may be used as the [article blurb in your knowledge base's search results](#).
- **Category landing pages:** Some category types and layouts will display an article's meta description on the page. This is especially true for [blog style categories](#) and a couple of the [default categories](#) display types. Blog style categories always display an article blurb for their articles, as in our [Release notes](#) category. If no meta description exists, these category landing pages will generally display the first sentence or two from the article itself, which may not be the most accurate summary.

The good news is that all of these use cases will benefit from you writing intentional, well-crafted meta descriptions. Following SEO best practices can also improve your readers' experience of your knowledge base in general.

KnowledgeOwl doesn't do anything to auto-populate the meta description field, so unless you've been aware of it and using it, you're missing a key SEO/social sharing opportunity.

## Add or edit a meta description

To add or edit a custom meta description to your article or category:

1. Open the article or category for editing.
2. Enter or update the **Meta Description**, located below the article body editor pane:
3. Be sure to **Save** your changes.

## Tips for writing good meta descriptions

Here are some general tips on getting the most out of your meta descriptions:

1. Meta descriptions should build on the [title tag](#), expanding on it in more detail.
2. Treat meta descriptions as both informative and as advertising copy: describe what's in the article or category AND encourage people to open it. Think about why someone might be looking for this article and try to address that why.

3. Aim for something between 50 and 150 characters.
  - Most search engines truncate meta descriptions around the 150-160 character mark. You want them to be long enough to provide a good description but not so long that the important details get truncated out.
4. Write a unique meta description for each article and category in your knowledge base.
5. Avoid standard/double quotation marks ("...") in meta descriptions. Google and other search engines will often truncate the description where these exist.
6. Use an active voice.
7. Not sure where to begin? If you're using Google Search Console or any other SEO/search tracking tool, find the articles and categories that are generating the most clicks or organic traffic for you and focus on improving those meta descriptions first.

## Learn more

Here are two resources to help you dig further into meta descriptions:

- [moz.com's Meta Description](#)
- [ahrefs.com's How to Write the Perfect Meta Description](#)

And if you're working on SEO optimization, check out Kate's blog post [Knowledge base SEO tips for those of us who hate SEO](#).

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