Explore features

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Deciding which features to use in your knowledge base can be one of the most exciting--and overwhelming--tasks. Here, we summarize the features we have available with links to more detailed instructions. If you can't figure out if something you want to do is supported, or you run into any trouble trying to get features working, contact us and we'll be happy to lend a hand.

We find it useful to think about our features in five groups:

- **Navigation-related features:** features that impact how your readers navigate your knowledge base.
- **Content-related features:** features that impact your content directly (articles or categories) or how your readers interact with your content
- **Integration-related features:** features that help you integrate KnowledgeOwl with other software
- **Metadata-related features:** features you can use to manage your content behind-the-scenes
- **Permissions-related features:** features that control what your authors or readers can see or do

There is a LOT of information here, so we've divided it into these groups to make it a little easier to find the features you might need, but if you're not sure what you need, we encourage you to browse below and ask questions as they arise!

Reader-related features

These are features that might impact the following areas:

- How your readers interact with your content, like search and navigation.
- How your readers can provide feedback or seek help.
- Interactions within individual articles or categories
- Change the layout or display of your articles, categories, or knowledge base.

Learn more
For more details on configuration options within articles and categories, refer to Create a new article and Create a category.

Glossary

For each knowledge base, create a glossary of terms and definitions. This can be especially useful if you have terms that your readers might not know, you use acronyms that you don't want to have to re-explain every time they appear, or you're trying to standardize the language your readers use to describe things.

You don't need to turn on the glossary feature, but you do have to create your glossary terms and definitions.

You do have to turn on certain options, such as:

- Whether to display a link to the glossary in your table of contents (this is usually included by default).
- Whether to auto-highlight glossary terms when they appear in your content, with hover-over definitions. (You always have the option to manually insert glossary terms (with the on-hover definition) into your content, no enabling necessary!)
- Whether to have glossary terms and their definitions returned in search results.

Article ratings

You can choose to display a "Was this article helpful?" type rating section in your content, using either a thumbs up/thumbs down or a 5-star rating system. These ratings are captured in the Article Ratings Report and can be reset whenever you wish.

You will need to enable the ratings feature, select the rating style, and decide on the rating text to display.

Comments

You can choose to include a comments section in your content to collect feedback or questions from your readers.

You will need to enable the comments feature, determine who can comment and view comments, figure out how you want to be notified about comments, whether they post instantly or require approval, and more. These comments are captured in the Comments reporting.

Contact Form

You can also add a Contact Form to your knowledge base, either to receive email directly or to send contact conversations into a ticketing system. If you are using your knowledge base for product or support purposes, we highly recommend evaluating this feature! It can be a great way to get your customers to reach out directly without having to switch to a different tool outside of your documentation. By default, the contact form will try to deflect the submission by searching the knowledge base and offering related resources, so this can be a first line of self-service defense, too.

By default, the Contact Form comes automatically enabled, and will send to the email address you used when you created the knowledge base. You will need to configure the Contact Form (you can also set it up to directly integrate with Zendesk or Freshdesk). Most ticketing/support systems support an email ticket submission process, so even if you aren't using Zendesk or Freshdesk, you should be able to use the basic configuration to send the contact form submissions to the email address for your support inbox. (We do this with Help Scout, for example!)

Subscriptions

Some knowledge bases contain important software or policy updates, compliance updates, or other critical information. (Or, on the flip side, they may contain blog categories and you'd like to encourage your customers to follow your blog.) For these situations, you can add subscriptions to your knowledge base. Subscriptions work like this:

- A reader can subscribe to individual categories in your knowledge base
- When you update articles in the category, if you use the **New or Updated Article Call Outs**, the article will get

flagged for subscription notification
- On a daily or weekly basis (your choice), a subscription notification email will be sent out to all your subscribers letting them know of New or Updated content.

You will need to enable subscriptions (which includes setting up your SMTP details--you may need some IT help with this!). Once enabled, you'll need to save articles with the New or Updated call outs to trigger the notification.

Related Articles

By default, your content will contain a Related Articles section, and KnowledgeOwl will try to automatically suggest 5 related articles based off of the article titles. You can specify which articles or categories should be displayed within an article by using the Add Related Article option in the editor.

You can also disable the automatically suggested articles across your entire knowledge base, or change the number of automatic related articles displayed (from 1-10).

Synonyms

This feature is one of our favorites, even though it's not one most customers think to ask for! So, let's say that you have a word or phrase that you use often in your documentation, but your readers might use variations of that word or phrase. For example: we use the words "knowledge base" a lot, but some of our customers call it a "knowledgebase", "k base", or "kbase". To keep search humming right along, sometimes a content writer might try to add each of those variations as a search phrase, or work the variations into the body of the text. That approach can solve the problem, but it puts a lot of strain on your writer to remember, and maintain, and update those phrases.

Instead, you can define search synonyms to relate your documentation's terms with the terms or acronyms that your readers might use. These synonyms are incorporated into our search indexing process, so that whenever a reader searches a synonym (like "kbase" in our example), they're returned all the content that references "knowledge base".

You do not need to do anything to enable the synonyms feature; you just need to start creating synonyms. Once you add synonyms, you will need to reindex your knowledge base for search, which will temporarily disable search until the index completes.

Search function & weights

KnowledgeOwl automatically indexes six fields for search, so you don't have to manually add keywords or anything:
- Title
- Permalink
- Body (the text in the editor)
- PDFs added to the content
- Meta description
- Search phrases

We also give you a lot of control over your search behavior, layout, and more. Refer to Search to learn all the available options and get search dialed in just how you like.

PDFs

All articles, custom content categories, and topic display categories get PDFs of their content automatically generated. You can change some of the settings for these individual PDFs in **Customize > PDF**. You cannot disable this generation, but you can turn it off for individual articles. Contact us to help remove the PDF icon from your entire knowledge base.

You can also choose to generate a PDF of your entire knowledge base (and make it available for download) or create custom PDFs for specific sections of content--these can be great for onboarding materials or training packets, for example. You do not need to do anything to enable these features, but you will need to generate the PDFs.

Required reading

If your knowledge base is entirely internal to your team or company, use **Required reading** to ensure your employees have read and acknowledged updated policies and procedures.

With this feature turned on, you set which articles are required and when you want to start collecting new required reading acknowledgements. You can choose how you want to display a required reading list to your readers. When readers view required content, they'll have a message at the top alerting them that it's required and they need to acknowledge it, and an acknowledgement checkbox they check once they've read it.

We track the readers' acknowledgements and generate a report you can review to determine who hasn't acknowledged the document.

Refer to Required Reading for more information.

Navigation

Rather than full feature sets, these are individual settings you may want to turn on or off:

- Configure your table of contents menus, including adding or removing elements (such as links to the homepage and glossary), and changing their default behavior.
- Use breadcrumbs so your readers always know where they are in your site structure.
- Include additional links in the top navigation bar.

Integration-related features

These are features that allow KnowledgeOwl to integrate with other websites or software. (Some of these are cross-listed in other features sections, as well.)

Some of these are quite full-featured and some would require some developers to help you make full use of.

Contextual Help Widget

If you'd like to display your knowledge base content in another website or application, the contextual help widget might be a great feature for you. The widget can be tied to a hyperlink or menu option in your site, or you can use the built-in "?" icon and choose where on the page to place it. When opened, the widget will display three tabs for your reader:

- **Knowledge tab**: includes a search bar to search your entire knowledge base and allows readers to navigate through the knowledge base entirely in the widget.
- **Recommended tab**: provides a list of recommended articles and categories, which you can customize for each URL in your site
- **Contact tab**: provides a widget version of the contact form

With these resources, your readers can get a lot more self-serve help and use your knowledge base a lot more actively, all from within your own site or application!

To get started using the widget, refer to our Set up Widget resources.

If you'd like to see this contextual help widget in action, we use it in two places:

- In this Support knowledge base, the **Contact support** link in the upper right will open the widget directly to the Contact tab.
- Within app.knowledgeowl.com, go to **Help > In-app help** in the upper right will open to the Recommended tab with relevant content.

Both uses of the widget show all three tabs in action.

Contact Form

You can add a Contact Form to your knowledge base, either to receive email directly or to send contact conversations into a ticketing system. If you are using your knowledge base for product or support purposes, we highly recommend evaluating this feature! It can be a great way to get your customers to reach out directly without having to switch to a different tool outside of your documentation. By default, the contact form will try to deflect the submission by searching the knowledge base and offering related resources, so this can be a first line of self-service defense, too.

By default, the Contact Form comes automatically enabled, and will send to the email address you used when you created the knowledge base. You will need to configure the Contact Form (you can also set it up to directly integrate with Zendesk or Freshdesk). Most ticketing/support systems support an email ticket submission process, so even if you aren't using Zendesk or Freshdesk, you should be able to use the basic configuration to send the contact form submissions to the email address for your support inbox. (We do this with Help Scout, for example!)

Zendesk App

If you are using Zendesk as a ticketing system, you can set up the KnowledgeOwl Zendesk App. This app will help your Zendesk agents by:

- Suggesting relevant articles based on the subject of the message
- Allowing agents to search for and insert links to relevant articles
- Allowing agents to create new articles from an existing ticket

To use this integration, in Zendesk, you'll need to enable the KnowledgeOwl app. Instructions are at the linked resource above.

Webhooks

Webhooks allow you to proactively subscribe to events that occur in your KnowledgeOwl account. When an event occurs that you have subscribed to, we will POST a message to the endpoint of your specification containing information about the event. Think of these as an automated message about actions happening in your knowledge base.

We offer two types of webhooks: one formatted specifically for the application Slack, and the other containing KnowledgeOwl API object data, which can be used with Zapier or used by your developers to automate processes.

Using Zapier with KnowledgeOwl

KnowledgeOwl has an official Zapier app for creating articles.

You can also use their webhook integration to integrate KnowledgeOwl with a variety of tools.

You might want to test a Zapier integration for things like:

- Sending contact form submissions into a Google Spreadsheet or Salesforce
- Automating social media posts when new KnowledgeOwl articles are published
- Capturing emails sent to an inbox of your choice and automatically creating new articles from them

The API

You can also roll all kinds of interesting integrations using the KnowledgeOwl API. While complex integrations here would likely be best handled by a developer, we do provide some resources for you to get familiar with working with an API and working with the KnowledgeOwl API specifically:

- Using the KnowledgeOwl API for info on generating an API key and using our API
- Check out our Endpoint reference for info on all of our endpoints
- Never used an API before? Check out Working with APIs for some information to help you get comfortable!

Author-related features

These are features designed to make your authors' lives easier:

- They generally don't display to your readers.
- They might allow you to classify, categorize, or audit your content or objects within your content.
- They also might make content creation and maintenance easier.

In short: these aren't the features that a reader (or, sadly, a manager) always get excited about, but they're the features that can save you or your fellow authors a lot of time, energy, and effort.

Manage articles

Manage is our primary export tool for all article metadata. Here, you can view all articles across your entire knowledge base:

- Use a handful of prebuilt standard filters based on publishing status.
- Create your own custom filters using criteria of your choice (including or excluding content with specific

tags, by specific authors, with a specific publishing status, restricted to certain author teams or reader groups, or created or modified within a set date range)
- Search and sort within any filter.
- Export any filter to CSV and choose from over 50 different fields of data, including all the metadata fields you see in the editor, version info, rating and view info.
- Bulk Edit articles to activate new versions, publish, archive, delete, add tags, and more!

The functionality within Manage Articles will help you audit, update, and report on your content. It's great for punchdown lists, bulk updates, and more. Refer to Manage articles for all kinds of resources on using this feature.

Tags

A tag is a word or short phrase that describes an article or category. Articles and categories may have as many tags as you like. Tags can be a great way to add organization and navigation to your knowledge base.

The easiest way to think about tags is to consider them like filters for your content. These filters can be used:
- By your readers using a tag search (which begins with ":" followed by the tag name)
- As custom filters in **Manage**: if you're using tags for these kinds of internal filters only, you can mark tags as "hidden" so they won't show up to readers

Tags can be created in the top-level **Tags** page, created individually on the fly as you're editing content, or created in bulk by pasting a comma-separated list of tags into the editor. Refer to Create a tag for more information.

You can merge tags that might be duplicates, and you can generate a tags usage report to see how many articles or categories your tags are added to.

Combining tags with **Manage Articles** filters can make for a very powerful auditing machine.

For example: for this support knowledge base, we have a tag for each page within app.knowledgeowl.com. When an article references a given page (such as **KB settings > Widget**), we add the tag for that page to the article. Then, any time we update the **KB settings > Widget** page, we can head to **Manage Articles** and run a filter to show all articles that reference that page. It makes content update considerably faster and less dependent on having your content hierarchy memorized!

Files

When you add any type of file to an article or category in your knowledge base--such as an image, PDF, or spreadsheet--that file is automatically stored in your top-level **Files** page. KnowledgeOwl provides unlimited file storage for files up to 200MB.

This knowledge base-wide Files storage offers a number of advantages:
- As you add more files to KnowledgeOwl, you can encourage your content creators to insert files **From Library** instead of uploading new every time. This encourages reuse of existing screenshots and files. (For this approach, we recommend uploading named files/screenshots rather than pasting images or screenshots in.)
- You can upload multiple files at once directly into the **Files** page, which can speed up content creation.
- When you need to update a file, you can head to the **Files** page and update the file there. This will

automatically update all of the articles or categories that reference it within a few minutes.
- You can delete files from the **Files** page, which will remove them from the "Insert From Library" options in the editors. (You can also use restore deleted files.)

File Labels

File labels are basically tags, but for your files. 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 Files page.

The easiest way to think about file labels is to consider them like filters for your files. These filters can be used in the **Files** page to make it easier to find files you need quickly.

We recommend using file labels for groups of content you like to access at once. (For example, we use them to distinguish "brand assets" like Linus logos/icons from our support screenshots.)

Synonyms

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Content templates and reuse

KnowledgeOwl supports several different ways to create content templates or reuse content. These include:
- **Topic articles**: Flag an article as a topic and you can embed the entire article's contents in other articles. Refer to Topic articles (Reuse an article within another article) for more information.
- **Article templates**: Flag an article as a template and you can create new articles from that template. Refer to Create a new article from template for more information.
- **Snippets**: Reusable pieces of code or text you can add to articles, **Customize > Style**, and more. Refer to Snippets for more information.
- **Shared content articles**: Synchronize the body and title of articles in different categories so you only have to edit that content once. Refer to Shared content articles for more information. c
- **Shared content categories**: For customers with multiple knowledge bases, sync an entire category and its contents between your knowledge bases. Refer to Shared content categories for more information.

These features are all available at all times; you don't need to turn them on.

Versions

KnowledgeOwl includes robust versioning, which allows you to stage and review changes to published articles before activating them (publishing them).

These versions can be a powerful way to provide an audit history of what's in your knowledge base. You can export PDFs of versions for compliance or audit purposes, add version notes, and share versions with others for review before they're live to all readers.

Refer to Versions for a lot more resources on versioning.

Style guide

Store your knowledge base's style guide directly in **KB settings > Style guide** so it's available as you edit articles. If you're AI-friendly, you can also use AI to evaluate your article's content against your style guide and get recommendations on how to improve it.

Refer to Style guide for more information.

Owl Analytics

Hate working with GA4 or other analytics tools? KnowledgeOwl has a robust analytics suite built right into it. View data and reports on total views, bounce rates, time on page, and more.

Refer to Owl Analytics for more information.

Permissions-related features

These are features that control what your authors or readers can see or do. These features directly relate back to the "Who" and "By whom" portions of the Purpose & audience.

As a reminder:

- An author is someone who can access app.knowledgeowl.com and create and update content, change knowledge base settings, or so forth
- A reader is someone who views your knowledge base

If you're a solo writer, you can skip the pieces on authors and jump straight to reader groups.

Custom author roles

When you assign an author to a knowledge base, you must designate what role that author has in the knowledge base. The role defines which actions the author can (and cannot) perform.

Your knowledge base comes with two pre-built author roles: Editor and Writer. An Editor can perform all actions in a knowledge base, including customizing any setting. A Writer does not have access to customize settings but can perform any action related to creating and editing content. For a more detailed breakdown of these two roles' permissions, see What is the difference between an editor and a writer?

If you have a team of authors, these two standard roles might not be nuanced enough. You can create custom author roles and assign them to individual authors, allowing you to get very fine-grained about what an author can and cannot do. (For example, customers with an internal review process will often have a role that can create and edit drafts but cannot publish or edit published articles.) If you do create custom author roles, we recommend documenting what the roles are and what permissions you gave them; templates for this documentation are included with the detailed list of custom author role permissions.

Author teams

Some knowledge bases include knowledge from different teams or departments. Sometimes, it makes sense to limit who can edit certain content, to avoid someone mistakenly editing the wrong thing. You can create author teams to help achieve this:

1. Create author teams for the content you'd like to restrict editing on.
2. Assign the relevant authors to that team.
3. Then, restrict a category, subcategory, or article to that team.

Authors who aren't a member of the team will be able to see the content, but will be prevented from editing it in any way. Authors who belong to the team will be able to edit it.

If you'd like to prevent authors from even seeing content belong to other teams, you'll want to use reader groups (see below).

Reader groups

For knowledge bases that require individual reader accounts, you can restrict access to some content by using reader groups. In this process, you:

1. Create reader groups
2. Restrict content to those groups
3. Assign individual readers to those groups

Readers who don't belong to the group won't see the restricted content anywhere; readers who do belong to the group will be able to see it as normal. You can test reader group access by using the View KB, View Category, or View Article links within the KnowledgeOwl app and then using the Change Reader Group option in the admin footer to see what different groups can see.

If you're using Single Sign-On, you can pass reader group membership over directly from your IdP, or you can set up Custom Attribute Map rules to assign SSO readers to groups.

You can also assign authors to reader groups.

> We only recommend assigning a reader group to an author when you have a compelling use case for hiding content from them.

By default, authors have access to all content, even that restricted to reader groups.

The one exception to this is: if you have checked one of the reader group boxes in the author's details, that author will only be able to see public content or content restricted to the group they belong to. If content exists that belongs to a group they aren't a member of, they will not be able to see it *anywhere* -- not in the knowledge base itself, but also nowhere in app.knowledgeowl.com, including Manage Articles, the Articles interface, the Find Articles search...it will be as if that content does not exist at all.

We mention it here because sometimes that functionality is very helpful if you are giving contractors or freelancers access to your knowledge base. You can restrict them to a "Contractors" reader group and only add that group to a very specific category of content.

If you don't mind that an author can see content, but you just want to prevent them from editing it, author teams are a much better solution.