

# Lesson Plan – Knowledge Base

---

## Table of Contents

- Goal ..... 2
- Topics ..... 2
  - Introduction ..... 2
  - Configuration ..... 2
  - Editing ..... 3
    - Main Page ..... 3
    - Articles ..... 4
    - Edit Categories ..... 6
    - Tags ..... 8

## Goal

By the end of this course, you'll learn how to set up a knowledge base using WordPress' Echo Plugin.

## Topics

What is a knowledge base?

### Configuration

- Editing the main page
- Editing articles
- Adding categories
- Tags

## Introduction

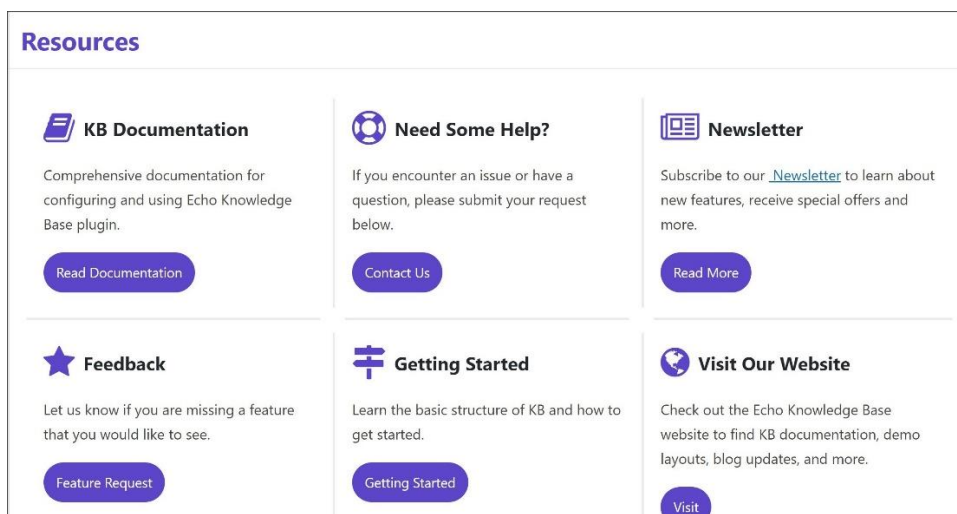
A knowledge base is a database of information about a specific application or process. The knowledge base contains materials that enhance performance support. You can add job aids, infographics, quick start guides, FAQs and other support materials to your knowledge base. We'll look at using the Echo Knowledge Base plugin for your WordPress website.

## Configuration

Go to the *Plugins* section of your control panel. Find the Knowledge Base plugin and click *Configuration*.



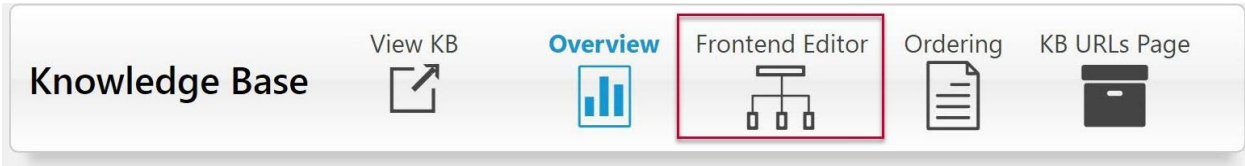
This takes you to the Overview section. The Configuration screen has a list of resources. Click on any of the panels to view its content.



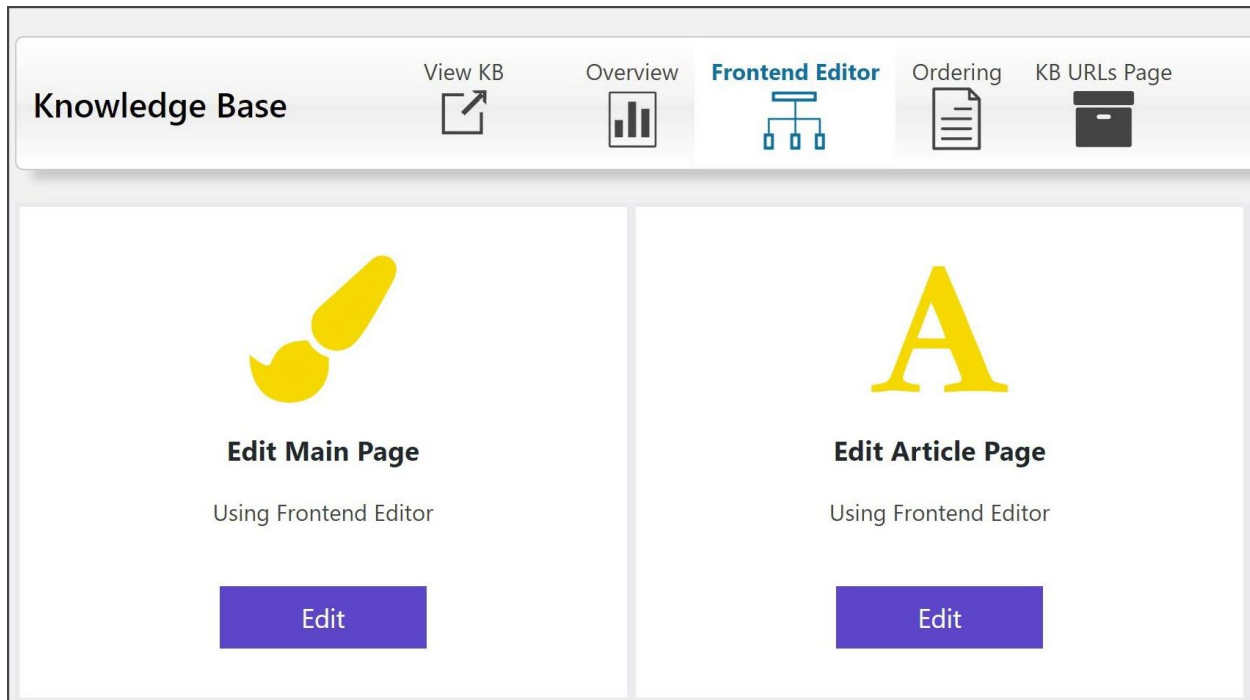
## Editing

### Main Page

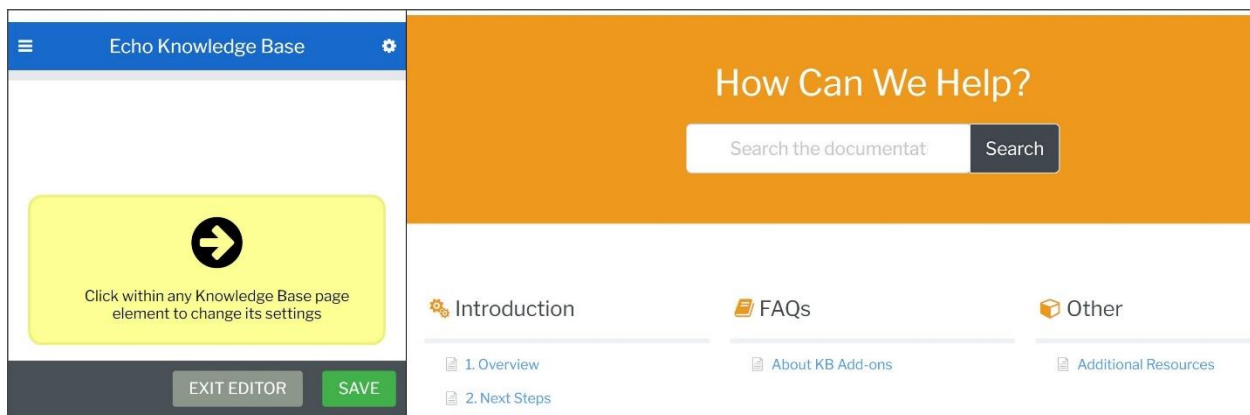
Click Frontend Editor to edit pages in the knowledge base.



Click *Edit Main Page*.

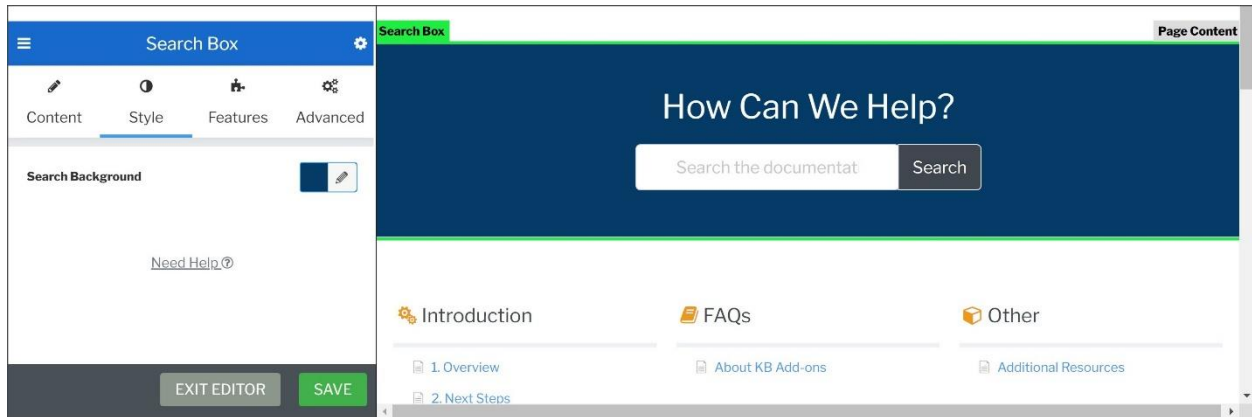


The main page has a search box and categories of documents your users can browse. Change a page element by clicking on it.



## Introduction to Echo Knowledge Base Plugin

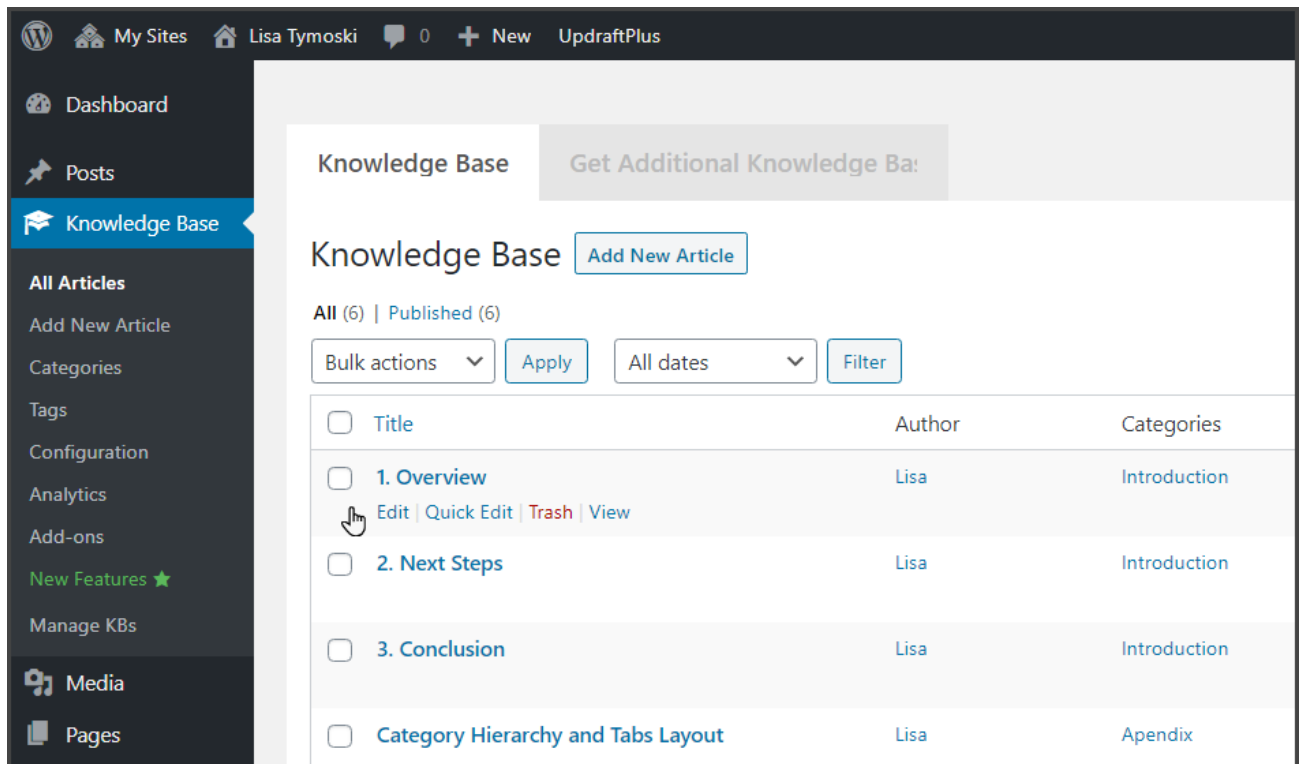
You'll see a editor on the left where you make changes. We changed the color of the Search element in this example. Remember to save your changes. You can only change the style of the page elements in this view and not create articles or change the categories.



## Articles

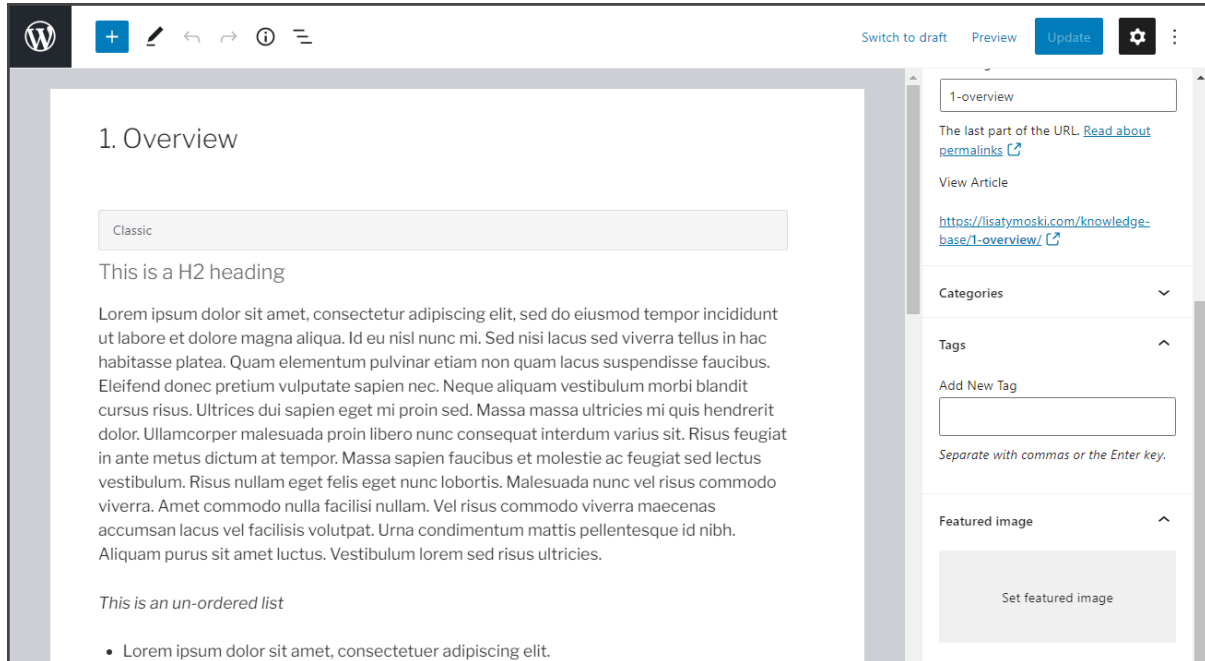
You can add articles to your knowledge base or edit ones that come pre-loaded as a template. Click All Articles on the Knowledge Base menu to view the list of available articles. You can also add an article on this screen.

Hover over the article you want to edit to view options and click *Edit*.



## Introduction to Echo Knowledge Base Plugin

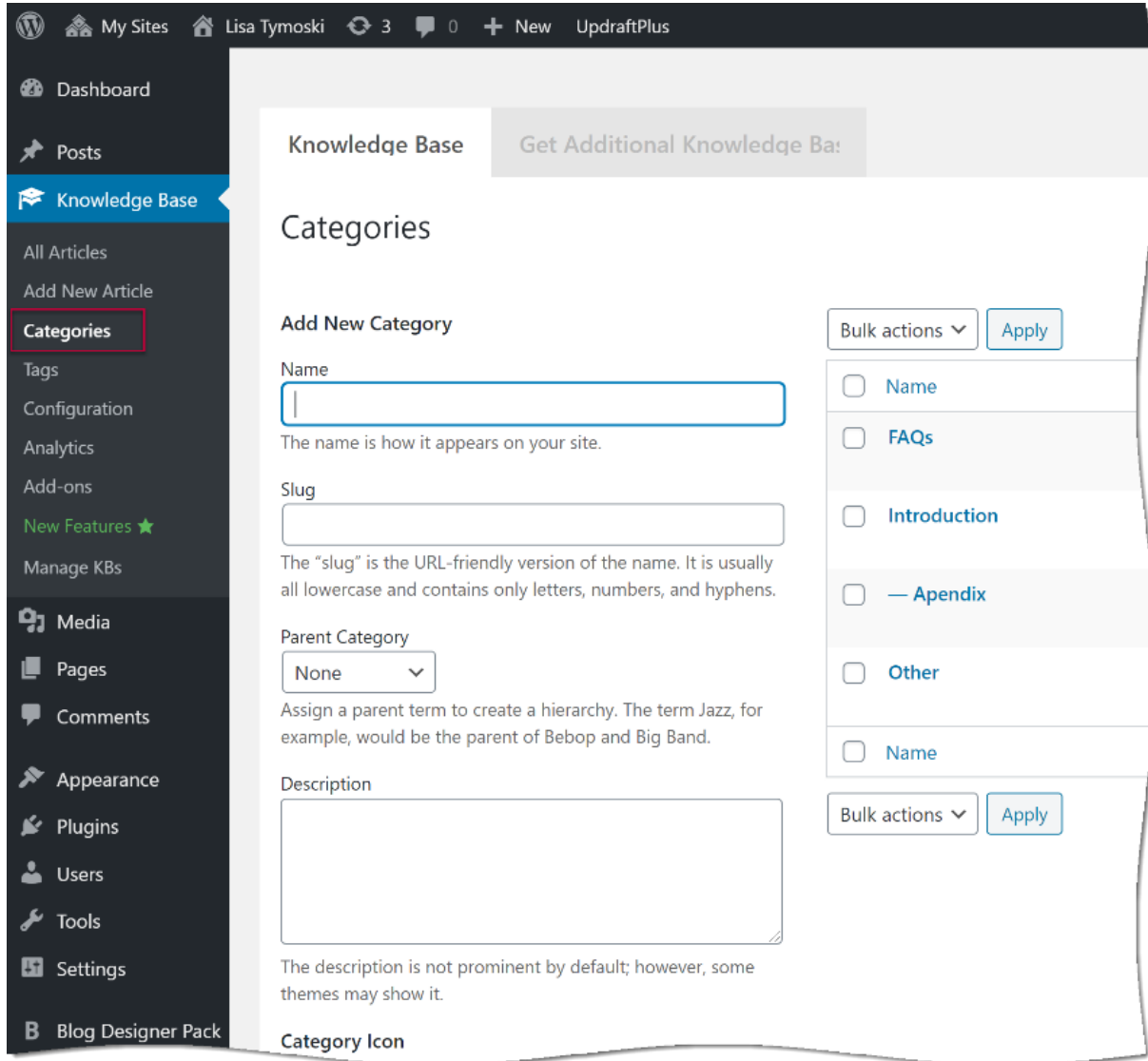
The article page has the same format as any other WordPress page. The page consists of blocks where you can edit or add more. You can place images within the page by using an image block. Settings are on the right-hand side and can be accessed by clicking the gear icon if they don't appear by default. Publish or update your page when you are finished.



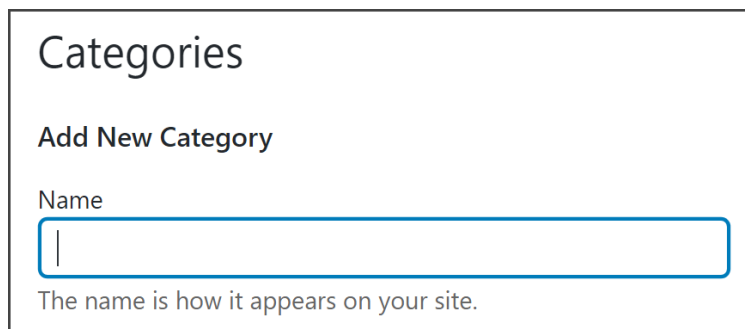
The screenshot displays the WordPress editor interface. The main content area shows a page titled "1. Overview" with a "Classic" block. The text within the block includes a heading "This is a H2 heading" followed by several paragraphs of Lorem Ipsum text. Below the text, there is a note "This is an un-ordered list" and a single bullet point. The right-hand sidebar contains settings for the page, including a search box for "1-overview", a "View Article" link, a "Categories" dropdown, a "Tags" section with an "Add New Tag" input field, and a "Featured image" section with a "Set featured image" button. The top of the editor shows the WordPress logo, a toolbar with icons for adding, editing, undo, redo, and help, and buttons for "Switch to draft", "Preview", "Update", and a settings gear icon.

## Edit Categories

To edit the contents of the main page, go into the Dashboard for your WordPress site. We'll edit the browse categories. View the menu for the knowledge base. Click *Categories*.



You can add a category on the left.



## Introduction to Echo Knowledge Base Plugin

On the right is the list of current categories. To make a change, hover with your mouse over the category name and click Edit.

| <input type="checkbox"/> Name                                                                                                       | Description          | Slug         | Count |
|-------------------------------------------------------------------------------------------------------------------------------------|----------------------|--------------|-------|
| <input type="checkbox"/> FAQs                                                                                                       | Category description | faqs         | 1     |
| <input type="checkbox"/> Introduction                                                                                               | Category description | introduction | 3     |
| <input type="checkbox"/> — Apendix                                                                                                  | Category description | apendix      | 1     |
| <input type="checkbox"/> Other<br><a href="#">Edit</a>   <a href="#">Quick Edit</a>   <a href="#">Delete</a>   <a href="#">View</a> | Category description | other        | 1     |
| <input type="checkbox"/> Name                                                                                                       | Description          | Slug         | Count |

Make your changes. In the example below, I changed the name of the category and the icon associated with it. Update your changes.

### Edit Category

**Name**   
The name is how it appears on your site.

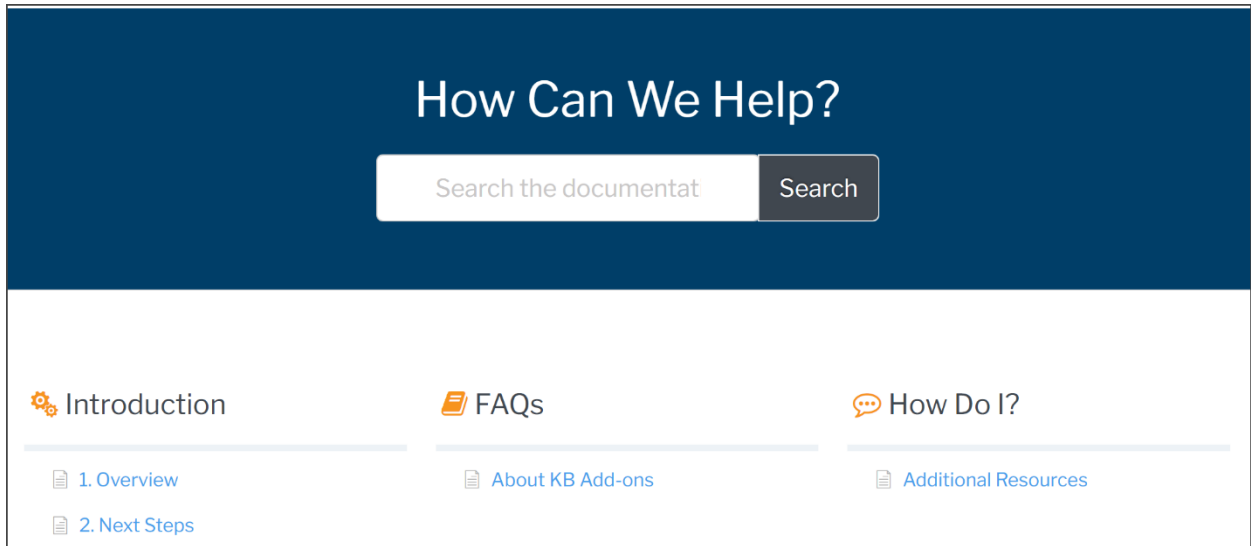
**Slug**   
The "slug" is the URL-friendly version of the name. It is usually all lowercase and contains only letters, numbers, and hyphens.

**Parent Category**   
Assign a parent term to create a hierarchy. The term Jazz, for example, would be the parent of Bebop and Big Band.

**Description**   
The description is not prominent by default; however, some themes may show it.

**Category Icon**

**i** Category Icons are enabled. [Turn Category Icons OFF](#)



## Tags

Add tags to your articles to make searching easier. Tags are keywords that describe your article. You can add them directly on the article in the settings, or on the Tags section of the knowledge base menu.

