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What are article templates?

Templates have two functions in KBPublisher--to standardize article design and to add boilerplate text.

To standardize design

Suppose you want each page in your knowledgebase to have three headings: 'Introduction', 'Steps' and 'Conclusion'. The 'Steps' section should be a simple bulleted list. You want all your authors to keep to the same format so you set up a template and ask them to create articles using that template

Or maybe you run a Help Desk. Rather than simply have users type their problem into a free-format article field, you can set up a form template and ask them to fill it in.

KBPublisher ships with four standard Article templates:

- The **default** template, which is a white background with standard formatting
- **Page Content** -- This is similar to the default template, but it includes headings and a numbered list
- **Info Box** -- a box with a yellow background, good for displaying information
- **Info Box 2** -- similar to Info Box, but the box has a grey background.

The default template is the base template. You do not need to specify it.

If you do specify a template, you can:

- Choose to replace existing content, whereby everything you have written in the article to date is overwritten, or
- Simply add the new template where your cursor is currently placed, or
- Include the template in the article. If you choose this option, a special tag (e.g. [tmpl:include|<template_key>]) is placed in the text to denote where the template is to be placed, and the content of the template is included at the rendering stage. This means that when you edit the article you do not see the contents that are being included; you just see the special tag.

Boilerplate text

If you find yourself continually typing the same content over and over again, you can use templates to simplify the work.

Maybe you need to add a disclaimer at the bottom of each page. The disclaimer is exactly the same on every page, and you don't want the bother of typing it in every time. A template saves time typing the disclaimer initially, but your legal people keep changing it. You don't want the hassle of changing every page. Not to worry. You can *include* a template. If the disclaimer changes, then all you have to do is change the template and the next time someone views the page they will see the correct disclaimer

The different ways you can add templates

A template is a piece of content (text and pictures and other media) that you can place into other articles. Common examples of where you might use a template are a disclaimer paragraph that you add to the bottom of each article, or a series of steps that are common to many of your instructions.

You can add, replace or include templates in articles.

- **Insert** pastes the content of the template into the article. Once the content is added you edit it like any other article content.
- **Replace** works the same way except that instead of just placing the template content into the article at your cursor position, it replaces everything in the article.
- **Include** is different in that it just puts a marker in the article, it doesn't put the contents in. The template content is pulled in when the reader opens the article to view it. When you edit the article you don't see the content from the template, all you see is a code like or [tmpl:includeisclaimer] and you can't edit the contents of the template in the article, you have to go back to the template to do it.

The great thing about **include** is that if you can update the template as many times as you like and the changes always flow through to the article. This is not like add and replace, which place the contents of the template into the article, so once it's there it doesn't change if you update the template.

To add a template to an article

Your template must exist before you can use it in an article.

To add a template to an article:

- **Add or update** the article.
- If you are going to add or link to a template, place the cursor where you want to include the template.
- Choose the template from the **Template** drop-down menu.

The screenshot shows the 'Edit' interface for an article. At the top, there's a header bar with 'Edit' in a blue box. Below it, article metadata is shown: ID: 52, Date posted: 01 Nov, 2007 04:03 AM, and Date updated: 06 Jul, 2019 04:45 PM by John Smith (smith@mail.com). The main editing area has fields for 'Type', '* Category' (with a search bar and a list containing 'User Manual -> Installation'), '* Title' (containing 'System Requirements'), and '* Article'. The '* Article' field has a dropdown menu open, showing a list of templates: 'Template:', 'Copyright notice', 'Info Box', 'Info Box 2' (highlighted in blue), 'Page Content 1', 'Template_1', 'Template_2', and 'Template'. To the right of the dropdown is a rich text editor toolbar with various icons for text formatting, alignment, and insertion. Below the toolbar, the article content is visible, starting with 'KBPublisher has very minimal requirements and should work on any modern server.' and 'Client Side:' followed by a bullet point 'Operating System: Any Windows, Mac or Linux'.

- Click on the appropriate insert template icon
 - If you wish to **add** the contents of the template to the article, click on the icon with the **blue** arrow. This pastes the text of the template where the cursor is currently positioned. It does not affect any of the text above or below it.
 - If you wish to **replace** the contents of the article, click on the icon with the **red** arrow. This deletes any text currently in the article and replaces it with the text in the template.
 - If you wish to **include** the contents of the template, click on the icon with the **green** arrow. This puts a placeholder into the article and when a user opens the article to read it, the knowledgebase pulls in the text from the placeholder template.
 - If you have defined a key for your template, you can also include the template by typing in the special template include command and the template key into the editor window. i.e. By typing [tmpl:include|<template_key>] where <template_key> is the template key
 - Or you can use the template ID in the template include command, i.e. [tmpl:include|<ID>] where <ID> is the template ID.

Alternatively, you can use the **Template** icon in the editing toolbar, but this only allows you to add or replace the template; it does not allow you to link the contents.

If you choose this option:

- Add or update the article
- Place your cursor where you want to insert the template
- Click on the **templates** icon (check out [the edit toolbar explained](#) to see where the templates icon is on the toolbar)
- This opens a pop-up box. If you intend to replace the current contents, check **Replace actual contents**
- Click on the name of the template
- This returns you to the editor with the template inserted.

Tip:

- You can also use the [article type](#) as a form of template.

Add an Article Template

To add a new article template

- Click on the **Articles** menu
- Choose the **Article Template** tab
- Click on **Add New**.

Once you are on the article screen you must complete the following sections:

- Add a **Title**. This is the name of the template.
- Set up your template in the **Template** editing box.

The following items are optional:

- You can include a template **key** to use to easily identify the template when including it in articles
- You can add a **description** to explain what the template is used for
- You can specify whether the template can be used by marking it **active**. If you don't mark the template as active, then authors cannot use it in their articles.

Once your article is complete

- Click **Save**.

Another form of template is the article type.

Each article can be assigned a 'type'. Your knowledgebase might contain, for example, the following types:

- Procedures which contain a short summary, plus some steps
- Screen images, with an explanation of each field on the screen
- Common error messages showing the error number, the message, and an explanation of what it means.

You can use article types to set up a base template for each type of article. For example, the Procedures type may contain one heading called *Summary*, and another called *Steps* with a numbered list below it, while the Error Messages type contains three headings: *Error No*, *Error Message* and *Explanation*. Set up your article types templates with these headings.

When you create a new article, choose the appropriate type from the **Type** drop-down list, and the headings are automatically included in the article. All you need to do then is fill in the blanks.

