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## What are Tags?

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**Tagging** is another non-hierarchical way to group related articles together and to quickly tell readers what they are reading about. Tag keywords and phrases so readers can easily find articles related to specific topics.

Tags are similar to categories, but are more specific. The use of tags is optional.

## Tagging Content

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### Tagging an article, news, or file?

It's easy! When you create or update an article or a file, you can assign and/or add new tags to it using the **Meta Keywords/Tags** field.

Click on the **Add a tag** link below the text editor.

You can add tags one at a time by hitting the Enter after typing each tag. Or you can add multiple tags at a time by separating each with a space as you type. You can join 2 or more words together in one tag by enclosing them in quotation marks.

To select a tag from your existing list (tags previously used in KBPublisher) click **Choose from your tags** and select the tags you want to use.

**Note:** Changes are not saved until you save an article.

## Bulk Add or Update Tags

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To bulk add or update tags, log on to the **Admin Area**

1. If you are updating:

- an article's tags, click on the **Articles** menu
- a file's tags, click on the **Files** menu
- a news' tags, click on the **News** menu

2. Choose **Set Tags** from the **Actions with selected** drop-down

- a second drop-down will display the following options:

Remove any tags:

- Choose **Remove all tags** from the second drop-down box
- Click **OK**

Add tags:

- Choose **Add to existing** to add tags and not remove existing ones or **Replace existing** to remove old tags and assign new ones
- Click **Add a tag**
- Assign tags from choosing existing ones or add your own tags
- Click **OK** to save the change

## Managing Tags

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You must have administrator access to manage tags.

Login to **Admin Area**, click **Tools**, choose the **Tags** tab.

From here you can see all the tags used in KB.

### Create or updating a tag

The following are compulsory:

- You must enter a tag name in **Title**
- Check **Visible** to make tag visible to end users or uncheck so that it is hidden

You may also wish to:

- Add a **Description** to explain why this tag has been set up and how it should be used  
This information is displayed in Public Area, under Tags to help end users searching for content

### What is a difference between visible and hidden tags?

A visible tag displays in the Tags of and article (below the article) in the Public Area. Although hidden tags do not display in the Tags section, it is always used for searching.

### Can I safely update or delete tags?

Yes, you can. When you update a tag it will affects all entries already assigned.

Conversely, when you delete a tag, it will be deleted from all entries that is was assigned to.

Since the daily scheduled tasks are responsible for updating meta keywords updates it might take some time for these changes to take effect.

## Tags in Public Area

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The 3 uses of tags in the Public Area

- While viewing an article you can see all assigned tags below an article.  
Click on a tag to display all articles with this tag. This function is the same for the News section.
- The **Tags** section will list all tags.  
Click a tag to be be redirected to search section displaying all articles with this tag.
- In Advanced Search you can search the knowledgebase by tags.
  - Type keywords in **Keywords** field, you can type several keywords separated by comma
  - In **Search In** choose **Articles (tags, keywords)** or **Files (tags, keywords)** or **News (tags, keywords)**
  - Click **Search** and KBPublisher will search in articles, files, or news respectively.



# Custom fields

Custom Fields

## Custom Fields

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You can customize your knowledgebase by adding custom fields.

These custom fields can be defined for:

- Articles
- Files
- News
- Feedback form

For articles, the custom fields can:

- Be displayed at the top of the article
- Be displayed at the bottom of the article
- Be displayed after the rating block
- Or they can be hidden, for internal use only

For files, fields are for internal use only. That is, you can see them when you add the file, but the user cannot see them.

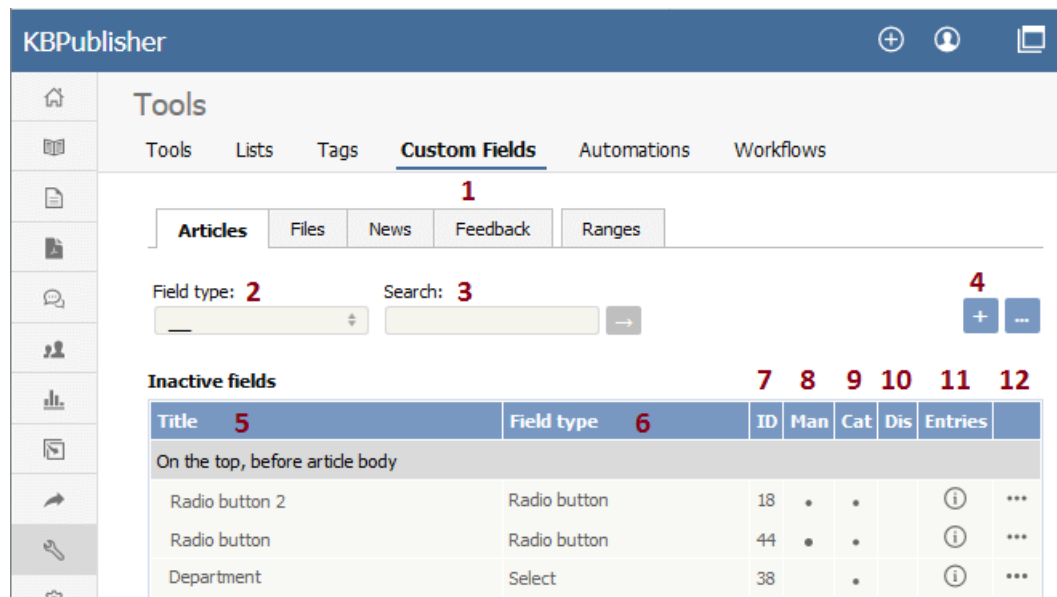
Depending on where the field is displayed, you can also include text around the field. For example, the field may be 'Department', and the valid value in the field might be 'Sales', but the user might see this as 'Contact the Sales Department for further information'.

You can show or hide any field in a search form.

## The Custom Fields Tab Explained

This screen allows you to create custom fields, and to place them in your knowledgebase.

### The Custom Fields tab



1. The **Custom Fields** tab allows you create and manage the fields and to control which categories or areas they are attached to. The **Ranges** tab allows you to create a set of valid values which you can then assign to one or more custom fields.
2. **Field type** is a filter that allows you to view custom fields for a specified Field types. Select your filter and then click the [→] button to restrict the list.
3. You can also search on the name of the custom field by typing the name into the **Search** fields and then clicking the [→] button.
4. Clicking the **Add New** button allows you to create a new custom field. Note that you can only create the field to go with a specific entry type. Thus if you want to add, say, a *Department* field to both articles and files, then you would need to create two custom fields.
5. The **Title** is the name that the user sees on the screen when they add or read an article
6. The **Field type** denotes the type of field it is. Whether it's a checkbox, or a select box, or even free-flowing text
7. The **ID** denotes a unique identifier of the custom field.
8. **Man** denotes mandatory. When a field is mandatory the author creating the item cannot leave this field blank.
9. **Cat** shows if the custom field is displayed in a certain category.
10. **Dis** shows if the custom field is displayed in the search screen.
11. The [i] button opens a list of entries where the custom field is used.
12. The last column contains the [...] button which opens a menu with the following commands:
  - **Apply** allows you to set a value for all articles which match field criteria. This is useful when you already have existing items and want to add a value to the old items. Note that it only applies value to items that do not already have an associated custom value, so you don't have to worry about overwriting items you have already set.
  - **Set active/inactive** allows you to set the status of the custom filed. If the active status is set, the user can fill it in.
  - **Edit** allows you to edit the custom field. Note that you can also double-click anywhere in the line on the field to edit as well.
  - **Delete** allows you to delete the field. If you attempt to delete a field that is being used you will get a warning message telling you the field is being used and you will need to decide if you still wish to delete the field after that.

### The Ranges tab

KBPublisher

Tools

Tools

Lists

Tags

Custom Fields

Automations

Workflows

Articles

Files

News

Feedback

Ranges

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+

Records: 1 - 8 of 8

Pages: 1

Records per page: 10

Title 14	Description 15	Entries 16	
ExtraItems	Check box of extras	5	...
Department	Company departments	1	...
My new list	My new list of items	3	...

The ranges are the valid values you can select from. For example, you may have a list of departments, or a checkbox that allows you to denote whether extra information is required.

You can also re-use ranges. That list of departments might be a drop-down select box in your FAQ category, and a radio-button select on the feedback form.

13. **Add New** here means add a new set of valid values.
14. Click on the **Title** to open the range set and add new values or edit existing ones, including re-order the fields.
15. **Description** is a description of the field range. When a user is adding a custom field, this is the text they see when they click on the inline help.
16. **Entries** shows a total number of custom fields where the range is used.
17. The last column contains the [...] button which opens a menu with the following commands:
  - **View Items** takes you to the range, so that you can edit, update or re-sort the individual valid values
  - **Edit** allows you to rename the range and update the description
  - **Delete** deletes the range. If the range is being used by custom fields, you will not be able to delete it. Use **Entries** to see which fields contain the range.

Bulk actions available depend on your user access.

For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

## Add a new custom field

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### To add a new custom field

- Click on **Tools -> Custom Fields** tab
- Click on the **Article, File** or other tab
- Click **Add New**
- Choose your **field type** by clicking on one of the field types.
- **Categories**  
If you are adding the field to articles or files, you will then be taken to the **Categories** tab and prompted for a **category**. Add any categories where the field is to be displayed. If you want the field displayed in all categories, leave this blank
- Click **Form Options** tab
- Add the name of the field to the **Title** field
- Add a **tooltip** if required
- Check **Mandatory** if you want to force the user to fill in this field
- Check **Active** if the field is to be used immediately i.e. if you want the field to appear on the screen
- Click on the **Ranges** tab
- Click on **Set Range**
- If you wish to use an existing range click **Assign** to assign the range  
If you wish to create a new range, click **Add New** and [add the new range], then click **Set Range** to assign the range to the custom field
- Click on the **Display Options** tab
- Use the drop-down **Display** field to choose where the field is to be displayed on the screen.  
Note that when you enter the field as part of creating the article, it is always displayed under the article content. This display field define where the text is displayed in the Public area
- If you wish you can also add some text around the field by adding it to the **HTML Template**. For example if your custom field is 'Department' and the value you input is 'Sales' then:  
`{title}: {value} - displays Department: Sales`  
`Welcome to the {value} team - displays Welcome to the Sales team`  
Note that this extra text is not displayed if you have chosen 'Hidden, not displayed in Public Area' as the display option
- If you wish your visitors will be able to search in this field check **Display in search** checkbox
- Click **Save** to create the field.

Note:

- If you have existing articles or files, then you will be given the option to add a default value to those items. If you wish to add a default value, select the value and click **Add Values**.

Bulk actions available depend on your user access.

For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

## Add a new custom field range

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### What is a custom field range

A range is a list of valid values that you can use in your custom fields.

Once you have set up a range you can re-use it as many times as you like. For example, one time you might have it as a drop-down option in an article category, another time you might include it as a radio button list in the news area.

### Create the range

- Click on **Settings** menu
- Select the **Custom Fields** page
- Choose **Ranges** tab
- **Add New**
- Add an appropriate name to the **Title** field, for example, Department.
- We recommend that you add an appropriate **description** as well.
- Click **Save**.

This adds the field and sets up ready to add each of the values. Then, for each valid value you wish to add:

- Add the name of the value in the **Title** field
- Add a number in the **Order** field to show where it will be placed in the list. By default this is numbered sequentially in the order that you add them
- **Save** if you wish to add another valid value.

Bulk actions available depend on your user access.

For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

## Update values in a custom field range

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To update values in a custom field range

- Click on **Settings** menu
- Choose **Custom Fields** tab
- Choose **Ranges** tab
- Click on the name of the range that you wish to edit

From here you can

- Add new values to the range by
  - Click **Add New**
  - Add a **Title**
  - Click **Save**
- Change the name of a valid value value by:
  - Click on the edit icon of the value you wish to change
  - Update the **Title**
  - Click **Save**
- Delete existing values
  - Click on the delete icon of the value you wish to change
  - Click **Save** to confirm that you really do want to delete the value
- Reorder the range
  - Click on the edit icon of the value you wish to change
  - Type the new order into the **Order** field
  - Click **Save**

You will need to do this for each valid value in the range, as the other values do not automatically re-order themselves.

Bulk actions available depend on your user access.

For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.

## To see where a custom field is used

## To see all items where a field is used

- Click on **Settings** menu
- Choose the **Custom Fields** tab
- Click a tab with the entry type
- Click on [i] in the **Entries** column

## To see where items with a specific valid value are used

This functionality works in a similar way for articles, files, news and feedback, even though the example given here is for articles.

- Log on to the **Admin area**
- Click on **Articles** (if field is under Articles, or Files, News or Feedback if field is under, respectively, files, news or feedback)
- Click on the [+] button to the left of the category drop-down

The screenshot shows the KBPublisher interface for managing articles. The top navigation bar includes 'Articles', 'Drafts', 'Featured', 'Comments', 'Feedbacks', 'Glossary', 'Categories', and 'Template'. The 'Articles' tab is active. Below the navigation bar, there are search filters: 'Category:', 'Status:', 'Type:', and 'Search:'. A red '3' is next to the 'Search:' field. Below these filters is a 'Department:' dropdown menu. A 'Search' button is located below the department dropdown. The results section shows 'Records: 1 - 10 of 143', 'Pages: 1 of 15', and 'Records per page: 10'. A table lists the articles with columns: ID, Posted, Updated, Title, Category, Rating, Views, Status, and Actions. The first two rows are visible.

ID	Posted	Updated	Title	Category	Rating	Views	Status	Actions
62	03 Nov, 2007	14 Sep, 2016	<a href="#">The category input screen explained</a>	<a href="#">Comments</a>	★★★★☆	43088	Active	...
487	09 Jun, 2019		<a href="#">Adding Code Snippets</a>	<a href="#">New Category</a>	★★★★★	6	Active	...

This brings up a list of all custom fields for articles (or files/news/feedback)

- Select the specific field and value that you are looking for
- Click on **Search**.

This brings up a list of all articles with that particular custom field value.

Bulk actions available depend on your user access.

For example if your privilege does not allow you to delete items, or allows you to only delete articles that you have created, then there is no 'Delete' action in the list of options. If your privilege does not allow you to update items, or allows you to only update items you have created, then this menu will not be available for you at all.



## Search in custom fields

You can search for data in both the [Public Area](#) and in the [Admin Area](#).

### To search in the Public Area

- Click on **Advanced Search**
- Select a type (**Article** or **Files**)
- Click **Extra Options** section which contains all the custom fields

The screenshot shows the KBPublisher Advanced Search interface. At the top, there's a navigation bar with links: Knowledgebase, News, Downloads, Glossary, Ask a Question, Tags, and Site Map. Below this is a breadcrumb trail: KB Home / Advanced search. A search input field is present with a search icon and a help icon. Below the search field, there are three columns of filters: Type, Find results, and Last Updated. The Type column has radio buttons for All Content, Articles (selected), Files, and News. The Find results column has radio buttons for Everywhere (title, body, tags, ...) (selected), In titles only, In keywords/tags, and By entry ID. The Last Updated column has radio buttons for Any (selected), Last 10 days, Last 30 days, Last year, and Custom period. At the bottom, there are three dropdown menus: Category, Article type, and Department.

### To search in the Admin Area

- Click on **Articles** (if field is under Articles, or Files, News or Feedback if field is under, respectively, files, news or feedback)
- Click on the **[+]** button to the left of the search area

The screenshot shows the KBPublisher Admin Area search interface for Articles. The top navigation bar includes a home icon, a search icon, a user icon, and a document icon. Below this is a sidebar with icons for home, articles, drafts, featured, comments, feedbacks, glossary, categories, and template. The main content area is titled 'Articles' and has tabs for Articles, Drafts, Featured, Comments, Feedbacks, Glossary, Categories, and Template. Below the tabs, there are search filters: Category, Status, Type, and Search. The Search field has a red '3' next to it. Below the filters, there is a Department dropdown menu. A 'Search' button is located below the Department dropdown. At the bottom, there is a table showing the search results. The table has columns: ID, Posted, Updated, Title, Category, Rating, Views, Status, and Actions. The first row shows an article with ID 62, posted on 03 Nov, 2007, updated on 14 Sep, 2016, titled 'The category input screen explained', in the 'Comments' category, with a rating of 4 stars, 43088 views, and a status of 'Published'. The second row shows an article with ID 487, posted on 09 Jun, 2019, titled 'Adding Code Snippets', in the 'New Category' category, with a rating of 5 stars, 6 views, and a status of 'Published'.

This brings up a list of all custom fields for articles (or files/news/feedback)

The list of custom fields display by default is custom fields that are included in all categories. If you want custom fields that are listed only in a specific category, select the category

Once you have your list of custom fields

- If necessary, choose a **category**.  
Categories default to 'all' and will also search in sub-categories if you use the default options
- Choose which field you wish to search on, and choose which data you wish to search for
  - If the field is a multi-choice field you will be presented with a list of drop-down values to select from
  - If the field is a checkbox, you will be able to check the value to choose items with that flag set
  - If the field is a text field, you will be able to type text into the field to search on

and so on.

- Click **Search** to start the search.

This brings up a list of all articles with that particular custom field value.

## Some working examples for search

Let's say you have a knowledgebase set up as follows:

Article	Category	Custom field	Valid values for custom field	Custom field defined at category level	Value in custom field
Teach yourself Photoshop	Product	Extras	DVD T-shirt Game	No	DVD
Nerds Rule	Product	Extras	DVD T-shirt Game	No	T-shirt
How to Make Cards	Product	Extras	DVD T-shirt Game	No	-
Our London Office	Branches	Retail shop	Yes No	Yes	Yes
Our Paris Office	Branches	Retail shop	Yes No	Yes	Yes
		Extras	DVD T-shirt Game	No	T-shirt

No valid value has been set for the article *How to make cards*. Also, *Extras* can be defined anywhere.

- If you click on search without defining any further parameters this brings back a list of all articles which contain values in any custom field, hence it would return:
  - *Teach Yourself Photoshop*
  - *Nerds Rule*
  - *Our London Office*
  - *Our Paris Office*
- If you select *T-shirt* in the *Extras* custom field, and then click on search (still not having defined any further parameters, or using *All*), this will bring back:
  - *Nerds Rule*
  - *Our Paris Office*
- If you select *T-shirt* in the *Extras* custom field, and choose the *Product* category, this will bring back:
  - *Nerds Rule*
- If you choose *T-shirt* in the *Extras* custom field, and *Yes* in the *Retail Shop* field, and search all levels, then your search will return:
  - *Nerds Rule*
  - *Our London Office*
  - *Our Paris Office*

This last is because it will search for either field, rather than both fields.

## Bulk add or update custom fields

To bulk add or update custom fields, log on to the and Admin area and then:

The screenshot shows the KBPublisher interface. At the top, there's a navigation bar with 'Articles' selected. Below it, there are tabs for 'Articles', 'Drafts', 'Featured', 'Comments', 'Feedbacks', 'Glossary', 'Categories', and 'Template'. A search bar is present with filters for 'Category:', 'Status:', 'Type:', and 'Search:'. Below the search bar is a 'Department:' dropdown and a 'Search' button. A table of articles is displayed with columns: ID, Posted, Updated, Title, Category, Rating, Views, Status, and Actions. The first article is 'System Requirements' with ID 52, posted on 01 Nov, 2007, updated on 28 Jul, 2019, category 'Installation', rating 5 stars, 115 views, and status 'Published'. The second article is 'Adding Code Snippets' with ID 487, posted on 09 Jun, 2019, category 'New Category', rating 5 stars, 6 views, and status 'Published'. A dropdown menu 'Actions with selected' is open, showing options like 'Move to Category', 'Add to Category', 'Set Tags', 'Set Private', 'Set Public (remove private)', 'Schedule', 'Reset Rating', 'Set Type', 'Set Author', 'Set Custom Fields' (highlighted), 'Set Status', and 'Move to Trash'.

1. If you are updating:

- an article custom field, click on the **Articles** menu
- a file custom field, click on the **Files** menu
- a news custom field, click on the **News** menu
- a feedback custom field, click on the **Feedback** menu

2. By default, the listing displays all custom fields that are not assigned for specific categories.

To see fields assigned to a specific category, select the category you wish to search on. This displays all custom fields for the category, plus any custom fields that are not assigned to a specific category.

3. Select the items whose custom fields you wish to update.

4. Choose **Set custom fields** from the **Actions with selected** drop-down.

This brings up a second drop-down box for you to select from.

The 'Set Custom Fields' dialog box is shown. It has a title bar with a close button. Inside, there's a dropdown menu with 'Remove all custom fields' selected. At the bottom, there are 'OK' and 'Cancel' buttons.

5. If you wish to:

Remove any custom fields set:

- Choose **remove all custom fields** from the second drop-down box
- Click **OK**

Update a single custom field:

- Choose the custom field from the second drop-down box
- This brings up the fields associated with the category beneath the drop-down
- If the field is not currently associated with the item(s), this brings up a check-box **add to existing**
- If you wish to add the field to the selected items, check this box
- Update the field as required
- Click **OK** to save the change

Update all the custom fields at the one time:

- Choose **set all custom fields** from the second drop-down box
- This brings up the fields associated with the category beneath the drop-down
- Update fields as required
- Click **OK** to save the changes.



## The Lists Tab Explained

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The **Lists** tab under the **Tools** menu allows you to:

- Manage article statuses
- Manage file statuses
- Control article types
- Manage user statuses
- Manage feedback subjects
- Manage rating comments statuses

### Article and file statuses

KBPublisher has three default article and file statuses: Published, Not published and Outdated.

Use the **Lists** tab to add new statuses and modify existing ones. You control:

- The name of the status
- The color denoting that status
- Description
- Where the status appears in the list of statuses
- Whether the status is active
- Whether or not this status is published (which means users can see it),

[Add new article status](#) tells you how to add a new status for an article.

### Article types

Article types are used to group records for searching, to provide default template for the articles and to control the display of the type.

[Add new article type](#) explains how to create new article types.

### User statuses

KBPublisher has four default user statuses: Active, Pending (approval required), Not active / Suspended and Unconfirmed.

Use the **Lists** tab to create new user statuses and modify existing ones. You control:

- The name of the status
- The color denoting that status
- Description
- Where the status appears in the list of user statuses
- Whether the status is active.

### Feedback subjects

There is an option on the [Ask a Question](#) screen that allows the user to specify a feedback subject from a drop-down list. You define these feedback subjects on the **Lists** tab. You control:

- The title, which is what the user picks from the feedback subject list
- Description
- Who gets the feedback question (i.e. the specified supervisor)
- Color associated with this feedback subject
- Order it appears in the list
- Whether the feedback subject is active.

### Article feedback status

Rating comments have four initially-defined statuses: New, Ignore, In progress and Processed. You control:

- The name of the status
- The color denoting that status
- Description
- Where the status appears in the list of statuses
- Whether the status is active.



## Automations

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Use automations (automated tasks) to check your content regularly and perform certain actions as needed. You can make sure your articles are up to date, and alert staff to review them when they are not. You can let authors know when articles have been approved for publication, or let managers know when articles are ready for review.

To access your automations, select **Tools** from the menu bar. Then select the **Automations** sub-tab.

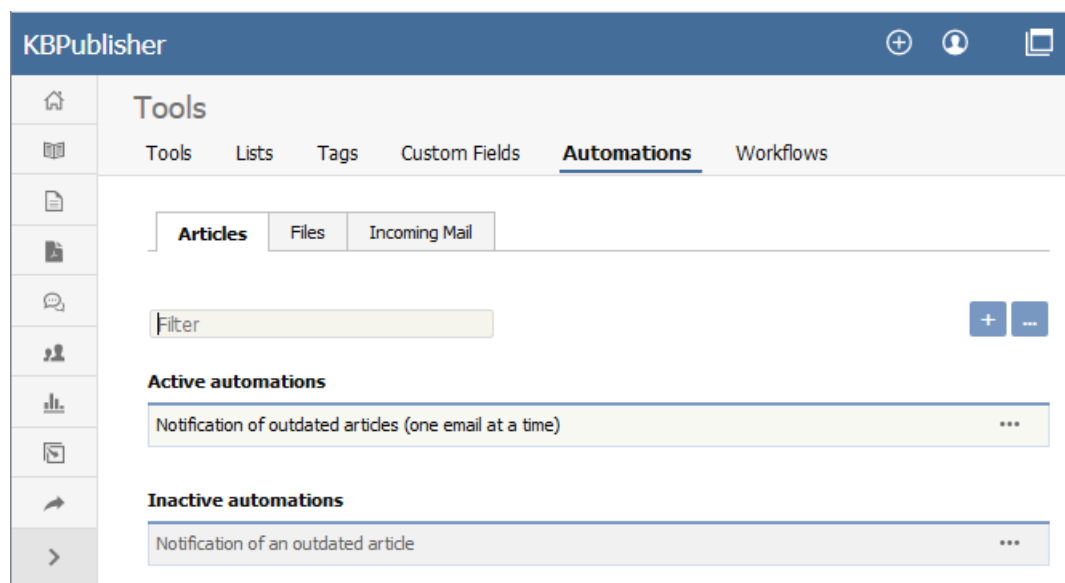
### Essential facts for automations

- Automations are time-based: they act when a time-based event occurs, such as the time since an article was edited exceeding a specified maximum time.
- Automations run daily, at midnight.
- An automation must contain a condition that is true only once, or an action that nullifies at least one of the conditions; otherwise, the automation will run daily, possibly sending unwanted duplicate alerts every time it runs.



## Manage Automations

To access your automations, select **Tools** from the menu bar. Then select the **Automations** sub-tab:



The tab displays both your active and inactive automations for either articles or files. Switch between the **Articles** and **Files** tabs to see all existing automations. If the list is long, enter a keyword in the **Filter** field to display just the automations that have that keyword in their titles. To restore the full list of automations, remove all text from the **Filter** field.

For each automation, you can click the button in the **Action** column and select an action to perform:

- **Change status** - Select to change the status of the automation from active to inactive, or from inactive to active. A confirmation message appears to make sure you want to change this status.
- **Duplicate** - Make a copy of the automation that you can then edit. This helps you quickly create automations that are similar to existing ones.
- **Edit** - Edit the automation. See [Creating or editing an automation](#).
- **Delete** - Select to delete the automation. A confirmation message appears to confirm you want to do this.

## Add an Automation

To create a new automation, click **Add new**. See [Creating or editing an automation](#).

## Reorder

To change the display and execution order of the automations:

- Click the button with three dots [...] in the top right corner.
- Choose Reorder from the popup menu.
- Rearrange the articles by dragging and dropping them in the results list.
- Click Save.

## Creating or editing an automation (automated task)

To create a new automation (automated task), click **Tools -> Automations** tab make sure you are on the sub-tab the automation will be for: **Articles**, **Files**, or **Incoming Mail**. Then click **Add new**. See the information below about completing the form that appears.

When you create a new automation, or update an existing one, you see the same form:

The screenshot shows the 'KBPublisher' interface with the 'Tools' tab selected and the 'Automations' sub-tab active. The form is titled 'Add new' and is for 'Articles'. It has fields for Title, Conditions (if All of the following conditions are met: Status Is Published), Actions (Perform the following actions: Set Status Published), and Active (checked Yes). There are Save and Cancel buttons at the bottom.

Complete the form in the following manner:

- **Title** - Required. Provide a descriptive title for this automation. It should not be the same as the title of an existing automation.
- **Conditions** - You must have at least one condition that the automation checks each time it runs. You can have multiple conditions. Set the automation to perform its actions if **any** or **all** of the conditions are true. Add a condition by clicking the + button; remove a condition by clicking its - button.
- **Actions** - If the automation finds that the conditions in the previous field are met, it performs the actions you set here. You can have multiple actions. Add an action by clicking the + button; remove an action by clicking its - button.
- Each action will either **set status** or **send emails** to one or more recipients.
  - **Set status** - If you choose this action, in the next field specify the new status for the article or file from the list of options shown above.
  - **Email** - you can choose to send an email to yourself or another user, or to a user group. You can opt to send one email for each item that matches the conditions, or to bundle all the notices into a single email. You need to prepare the email template in the fields that appear:
    - **Title** - Provide a title for the email.
    - **Body** - Provide the body of the email. You can use template tags to customize the email: for instance, if you want to include the title of the article in the email, you could write "This is an alert about the article [article.title]." When the automation needs to send the email, it replaces the template tag with the appropriate information. To see the template tags that are available, click **Show template tags**. To check that the email looks as it should, click **Test template** to see a preview.
- **Active** - Select to activate this automation. It will run daily until deactivated.

Click **Save** to save the automation. Click **Cancel** to abandon your edits and close the form.

### Important:

An active automation will run daily. Make sure that, when the automation finds an article or file that meets its conditions, one of the actions invalidates for that item one of the conditions of the automation.

## Incoming email automation (automated task)

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Incoming email automation allows you to parse your email box and create articles, drafts, or news from emails.

### Create or update an automation

To create a new automation for incoming email, click **Tools -> Automations -> Incoming Mail** tab, then click the **+** (**Add new**) icon.

To update an existing automation, click **Tools -> Automations -> Incoming Mail** tab, click the [...] icon on the right and choose **Edit** from the dropdown menu.

Complete the form in the following manner:

- **Title** - Provide a descriptive title for this automation. It should not be the same as the title of an existing automation.
- **Email Box** - Choose or set up a new email box to be parsed.
- **Conditions** - You must have at least one condition that the automation checks each time it runs. You can have multiple conditions. Set the automation to perform its actions if **any** or **all** of the conditions are true. Add a condition by clicking the **+** button. Remove a condition by clicking its **-** button.
- **Actions** - If the automation finds that the conditions in the previous field are met, it performs the actions you set here. You can have multiple actions. Add an action by clicking the **+** button. Remove an action by clicking its **-** button.
  - **Create Article Draft** - If you choose this action, an article draft will be created. You also can specify whether to send for approval or not by checking "*Send for approval*" checkbox.
  - **Create Article** - If you choose this action, an article will be created.
  - **Create News** - If you choose this action, a news will be created.
  - **Stop Evaluating Tasks** - Mail stops applying rules to a message when it encounters the Stop Evaluating Tasks action.
- **Active** - Select to activate this automation. It will run daily until deactivated.

Click **Save** to save the automation. Click **Cancel** to abandon your edits and close the form.

**Important:** An active automation will run daily.

### Create or update an Email Box

To create a new Email Box or update an existing one, you first must navigate to the Email Box list. Click **Tools -> Automations -> Incoming Mail** tab, then click [...] icon on the right and choose **Email Boxes**. A list of all available email boxes will appear.

To create new box, click the **+** button in the top right corner and fill the form.

To update an existing box click [...] in the list and choose **Edit** from dropdown menu.

Complete the form in the following manner:

- **Title** - Provide a title for the Email Box.
- **Hostname** - Provide a host name.
- **Port** - Provide a port. The default IMAP port is 143, or 993 when SSL/TLS is enabled.
- **SSL** - Check this checkbox to use SSL.
- **Mailbox** - Provide a mailbox name. The default is *INBOX*.
- **User** - Provide a username.
- **Password** - Provide a password.
- **Max message count** - This is the maximum number of messages to process in one task. If this number is exceeded, the mailbox will be skipped.

Click **Save** to save the Email Box. Click **Cancel** to abandon your edits and close the form.

## Incoming email - Stop Evaluating Tasks

Mail stops applying rules to a message when it encounters the Stop Evaluating Tasks action.

Tasks ordering and 'Stop Evaluating Tasks' actually server a purpose when you're working with complex tasks. For example, lets say you want to skip all tasks for auto-generated emails.

You need to create a "Stop Evaluating Tasks" tasks to make this happen.

In the below example "Create news" never triggerred if email is auto-genearetd email.

### Active automations

Stop evaluating tasks	...
Create news from an email	...

### Edit

* Title:	Stop evaluating tasks	
* Email Box:	host.kbpublisher.com	+
* Conditions:	if <span>All</span> of the following conditions are met:	
	Every auto-generated n	+ -
* Actions:	Perform the following actions:	
	Stop evaluating tasks	+ -
Active:	<input checked="" type="checkbox"/> Yes	

**Workflows**

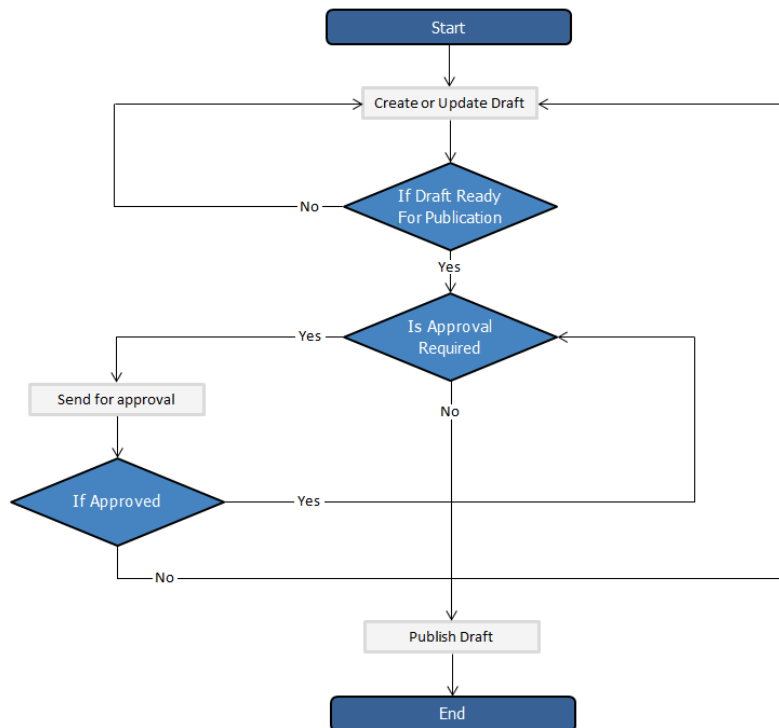
## Workflows

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Workflows automate processes for reviewing, approving, and publishing articles. This can save you time and make sure articles that may be ready to publish, but need approval, are not overlooked. If the item requires review and approval before it is published, a workflow can transfer the item to the worklist of the person who is responsible for approving it. That person can approve the article or send it back for further edits.

### Workflow Flowchart

The image below shows the path the draft of an article or file might have to follow if, after the author has written or uploaded it, one or more people have to review and approve it before publication.

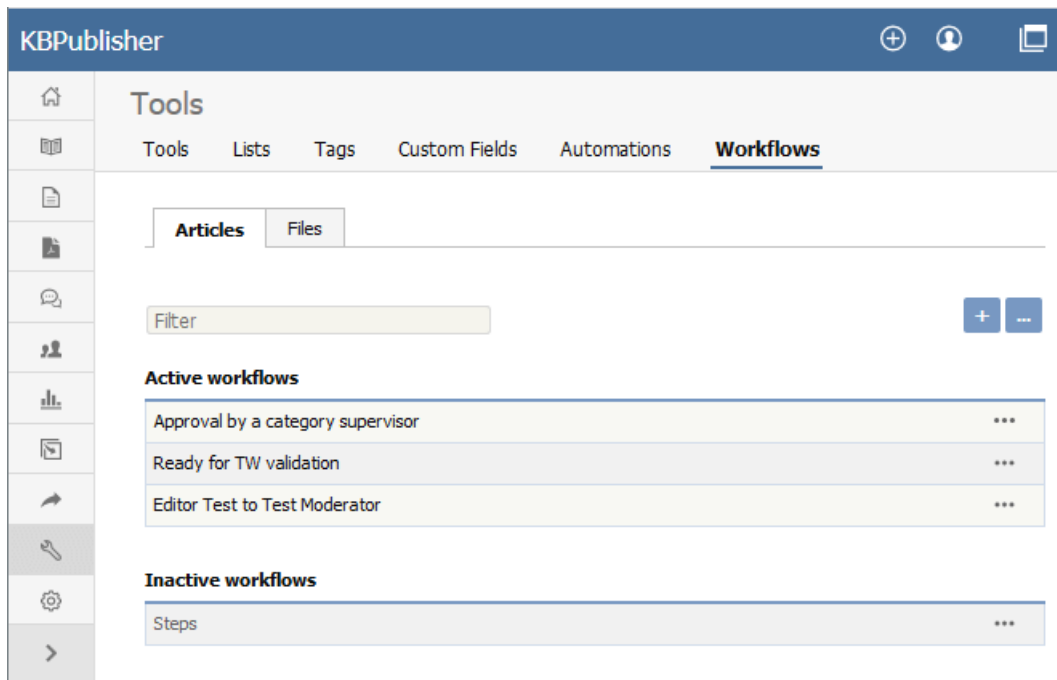


### Essential facts for workflows

- Workflows are applied to drafts of articles and files only
- You cannot delete or edit a workflow which in use (is applied to some drafts).
- You can have as many approval steps in a workflow as your project's process requires.

## Manage Workflows

To access your workflows, select **Tools** from the menu bar. Then select the **Workflows** sub-tab:



The tab displays both your active and inactive workflows for either articles or files. Switch between the **Articles** and **Files** tabs to see all existing workflows. If the list is long, enter a keyword in the **Filter** field to display just the workflows that have that keyword in their titles. To restore the full list, remove all text from the **Filter** field.

For each workflow, you can click the button in the **Action** column and select an action to perform:

- **Set Active/Inactive** - Select to change the status of the workflow from active to inactive, or from inactive to active. A confirmation message appears to make sure you want to change this status.
- **Duplicate** - Make a copy of the workflow that you can then edit. This helps you quickly create workflows that are similar to existing ones.
- **Edit** - Edit the workflow. See [Creating or editing a workflow](#).
- **Delete** - Select to delete the workflow. A confirmation message appears to confirm you want to do this.

**Note:** You cannot delete a workflow that is in use. Updates are limited while some drafts it relates to are being approved.

### Add a Workflow

To add a workflow, click **Add new** and complete the form. See [Creating or editing a workflow](#).

### Reorder

To change the display order of the workflows, click the [...] icon and choose **Reorder** from dropdown menu.

## Creating or editing a workflow

To locate your workflows, select **Tools** from the menu bar and then select the **Workflows** tab.

You can create your own workflow from scratch, or copy an existing workflow and adapt it to your needs. You can create or edit a workflow for either articles or files.

- To create a new workflow, click **Add new** to open the Workflow form.
- To edit a workflow, click the actions icon in the workflow's row and select **Edit**.
- To make a copy you can adapt, click the actions icon in the workflow's row and select **Copy**.

The workflow form appears, with blank fields if it is for a new workflow and with the existing information if you are editing or copying an existing workflow.

**Note:** you can't edit an active workflow. First change the workflow's status to "inactive" and then open it for editing. When you have completed the edits, you can change the status back to "active".

The screenshot shows the 'KBPublisher' interface with the 'Tools' menu open and the 'Workflows' tab selected. The 'Add new' form is displayed, allowing users to create a new workflow. The form includes sections for defining conditions (e.g., 'Draft Is' 'Is' 'Published') and steps (e.g., '1. Title' 'Assign to' '[category supervisors]'). There are also checkboxes for 'Optional Approval' and 'Active' status, and 'Save' and 'Cancel' buttons at the bottom.

Complete the fields in the form:

- **Title** -- Provide a unique, distinctive title for this workflow.
- **Conditions** -- Add one or more conditions that the workflow evaluates each time it runs. You can set the workflow to take action if **any** of the conditions are true, or if **all** conditions are true. In the example above the workflow conditions apply to articles that have been published and where the author's privilege level is greater than "author" (the author is also an editor, for example).
  - To add conditions, click the **[+]** button to the right of the field.
  - Each condition can apply to one of these:
    - Whether the draft is published or not.
    - The author's privilege level.
    - The author's identity.
- **Steps** -- Provide one or more steps for the workflow to take if the Conditions section evaluates to true.
  - Add steps by clicking the **[+]** button to the right of the field.
  - For each step, provide:
    - A title for the step.
    - The action to take (like "assign" the article or file).
    - Where relevant, the person or role to assign the article or file to. Select from the options provided.
- **Optional Approval** -- Select the checkbox to allow users to bypass the approval process in the workflow.
- **Active** -- By default, each workflow is set as active. To deactivate it, uncheck this check box. The workflow appears in the **Inactive workflows** list.

Click **Save** to save the workflow and add it to the active or inactive list.

Click **Cancel** to abandon your edit and close the form.



## Workflow examples

Here are some examples of how to use workflows for drafts of material that need review and approval before publication.

### Simple, one-step approval

When you have users with the "contributor" privilege adding a drafts, use a workflow like this to alert the category supervisor when draft content is ready for review.

Edit	
* Title:	Approval by a category supervisor
* Conditions:	if <span>All</span> of the following conditions are met: <div>Author's privilege level <span>Is Equal To</span> Contributor <span>+</span> <span>-</span></div>
* Steps:	Perform the following steps: <div>1. Review by category supervisors <span>+</span> <span>-</span> Assign to <span>[category supervisors]</span></div>
Optional Approval	<input type="checkbox"/> Allow users to bypass the approval process <span>?</span>
Active:	<input checked="" type="checkbox"/> Yes

The workflow checks for draft content that has been submitted for review by a "contributor" user and assigns such content to the appropriate supervisor. If the category has no supervisor assigned, KBPublisher parses the category tree to find the appropriate supervisor. If no category supervisor can be found, the system sends a message about the draft to the email address defined in **Settings > Email > Admin Email**.

You should assign a supervisor at least for each top category (the same supervisor can be responsible for multiple categories). See [Can I route an Approval email based on the category?](#) for information about assigning category supervisors.

### Assign to a specific approver

When you want a specific staff member to review draft submitted for publication, use a workflow like this that identifies the specific user:

Edit	
* Title:	Assign to user
* Conditions:	if <span>All</span> of the following conditions are met: <div>Author's privilege level <span>Is Less Than</span> Editor <span>+</span> <span>-</span></div>
* Steps:	Perform the following steps: <div>1. Assign to user <span>+</span> <span>-</span> Assign to <span>[current user: John Smi]</span></div>
Optional Approval	<input type="checkbox"/> Allow users to bypass the approval process <span>?</span>
Active:	<input checked="" type="checkbox"/> Yes

When a user with the "author" or "moderator" privilege adds a draft, the draft will be assigned for review to the person specified. In the example above, the person is the current logged-in user; but you can assign any user to review the material.

### Multiple-step approval

If your workflow requires multiple approval steps before draft material is published, use a workflow like this one:

Edit																	
* Title:	Two steps workflow																
* Conditions:	if <span>All</span> of the following conditions are met: <table border="1"> <tr> <td>Draft Is</td> <td>Is</td> <td>Published</td> <td>+</td> <td>-</td> </tr> </table>	Draft Is	Is	Published	+	-											
Draft Is	Is	Published	+	-													
* Steps:	Perform the following steps: <table border="1"> <tr> <td>1.</td> <td>Review, update</td> <td>+</td> <td>-</td> </tr> <tr> <td></td> <td>Assign to <span></span></td> <td>[privilege: Editor]</td> <td></td> </tr> <tr> <td>2.</td> <td>Final approve</td> <td>+</td> <td>-</td> </tr> <tr> <td></td> <td>Assign to <span></span></td> <td>[privilege: Moderator]</td> <td></td> </tr> </table>	1.	Review, update	+	-		Assign to <span></span>	[privilege: Editor]		2.	Final approve	+	-		Assign to <span></span>	[privilege: Moderator]	
1.	Review, update	+	-														
	Assign to <span></span>	[privilege: Editor]															
2.	Final approve	+	-														
	Assign to <span></span>	[privilege: Moderator]															
Optional Approval	<input type="checkbox"/> Allow users to bypass the approval process <span>?</span>																
Active:	<input checked="" type="checkbox"/> Yes																

In this example, when a contributor creates a new draft, the draft will be assigned for review to a user with "editor" privileges. When the editor has approved the material for publication, the draft is assigned to a user with "moderator" privileges for final review and approval. When the moderator has approved the material, it is published.

You can add as many approval steps as your project's process requires.

As with the first example, if KBPublisher cannot find a user with "editor" or "moderator" privileges, it sends a message about the draft material to the email address defined in **Settings > Email > Admin Email**.

