

Table of Contents

Table of Contents	1
Automations	2
Automations	3
Manage Automations	4
Creating or editing an automation (automated task)	5
Incoming email automation (automated task)	6
Incoming email - Stop Evaluating Tasks	7

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.

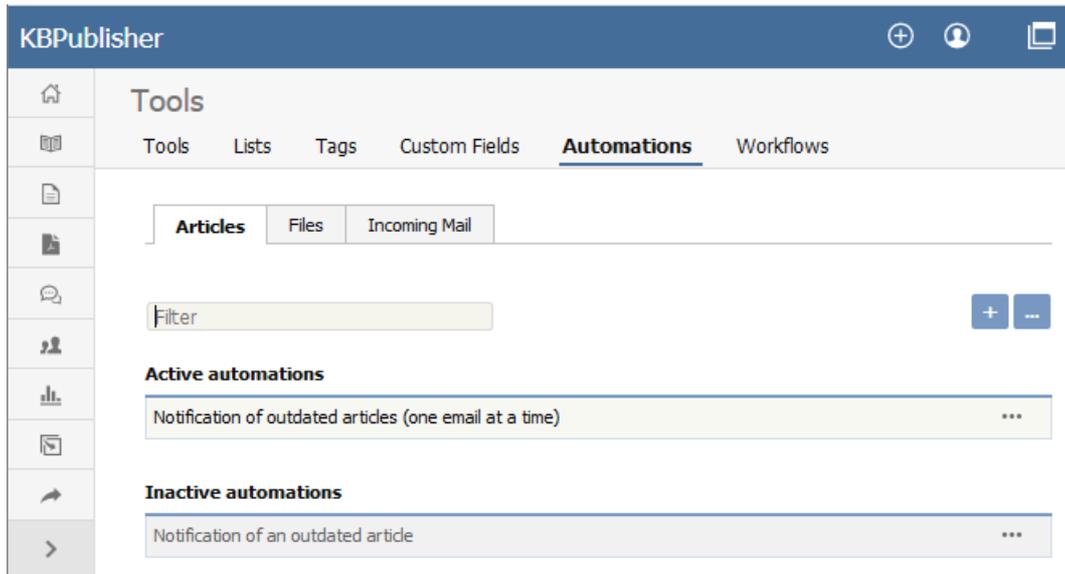
To access your automations, select **Tools** from the menu bar. Then select the **Automations** sub-tab.

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, 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 'Add new' automation form in KBPublisher. The form is titled 'Add new' and is located under the 'Tools' > 'Automations' path. It has three tabs: 'Articles', 'Files', and 'Incoming Mail', with 'Articles' selected. The form fields are: '* Title:' (text input), '* Conditions:' (if All of the following conditions are met: Status Is Published), and '* Actions:' (Perform the following actions: Set Status Published). There is also an 'Active:' checkbox checked 'Yes'. 'Save' and 'Cancel' buttons are 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 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 triggered if email is auto-generated email.

Active automations

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

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

