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Custom fields

Custom Fields

Custom Fields

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.

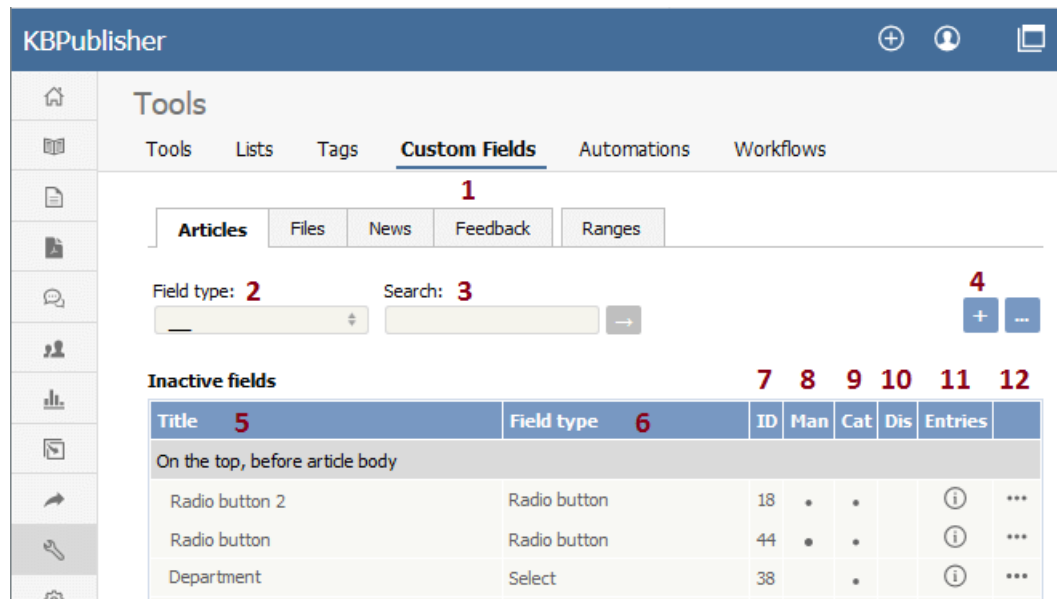
Depending on where the field is displayed, you can also include text around the field. For example, the field may be 'Department', and the valid value in the field might be 'Sales', but the user might see this as 'Contact the Sales Department for further information'.

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

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Records: 1 - 8 of 8Pages: 1Records per page: 10

Title	Description	Entries	
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.

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**.

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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.

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

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 Admin interface. 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 for 'Category:', 'Status:', 'Type:', and 'Search:'. A red '3' is next to the 'Search:' field. Below these filters is a 'Department:' dropdown menu with a red '2' next to it. A 'Search' button is located below the dropdown. At the bottom, there is a table of articles with columns: ID, Posted, Updated, Title, Category, Rating, Views, Status, and Actions. The table shows two articles: one with ID 62 and another with ID 487. A red '1' is next to the 'Category:' filter.

ID	Posted	Updated	Title	Category	Rating	Views	Status	Actions
62	03 Nov, 2007	14 Sep, 2016	The category input screen explained	Comments	★★★★☆	43088	Active	...
487	09 Jun, 2019		Adding Code Snippets	New Category	★★★★★	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 'Advanced search' page in the KBPublisher Public Area. 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 magnifying glass icon and a help icon. The search criteria are organized into three columns: Type, Find results, and Last Updated. Under 'Type', 'Articles' is selected. Under 'Find results', 'Everywhere (title, body, tags, ...)' is selected. Under 'Last Updated', 'Any' is selected. At the bottom, there are fields for '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 'Articles' search page in the KBPublisher Admin Area. 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. A 'Department:' dropdown is also present. A 'Search' button is located below these filters. At the bottom, there's a table of records. The table has columns: ID, Posted, Updated, Title, Category, Rating, Views, Status, and a final column with three dots. The first two records are visible.

ID	Posted	Updated	Title	Category	Rating	Views	Status	
62	03 Nov, 2007	14 Sep, 2016	The category input screen explained	Comments	★★★★★	43088	Blue square	...
487	09 Jun, 2019		Adding Code Snippets	New Category	★★★★★	6	Blue square	...

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. 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 for Category, Status, Type, and a search bar. A 'Department' dropdown is also present. A 'Search' button is located below these filters. The main content area displays a table of articles. The table has columns for ID, Posted, Updated, Title, Category, Rating, Views, Status, and Actions. The first two rows are visible: one with ID 52 and one with ID 487. The 'Actions with selected' dropdown menu is open, showing a list of actions including 'Set Custom Fields', which is highlighted in blue.

ID	Posted	Updated	Title	Category	Rating	Views	Status	Actions
52	01 Nov, 2007	28 Jul, 2019	System Requirements	Installation	★★★★★	115	Blue	...
487	09 Jun, 2019		Adding Code Snippets	New Category	★★★★★	6	Blue	...

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 is a dropdown menu with the text 'Remove all custom fields'. At the bottom, there are two buttons: 'OK' and 'Cancel'.

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.

