

Using templates in articles

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 of KBPublisher. At the top, there's a header bar with 'Edit'. Below it, article metadata is displayed: 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 a 'Type' dropdown, a 'Category' field with a search bar and a list of categories (User Manual -> Installation), and a 'Title' field containing 'System Requirements'. The 'Article' field has a 'Template' dropdown menu open, showing a list of templates: Template, Copyright notice, Info Box, Info Box 2 (highlighted), 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.

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