Article User Guide

Article Actions

Add Article

To start this action, click the   Add Article   button above the Article listing.

Creates a new Article.

When this action starts a form is displayed to enter the details of the Article.

Each field customises or controls some aspect of the Article display or behaviour.

Some fields are required and must be entered before the Article can be added, the required fields are Article Text, Short Article, Use Toolbox Items, Add to Search Engine Site Map file.

Although some fields are not required, it is best practice to populate these, including Title, Description, Add to Search Engine Site Map file.

Most fields are optional, and are often prefilled with a good default so these may not need to be changed. These optional fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

View

To start this action, select the Article you need to work on, and click the   View   button in the   ⋮   More Menu on that row.

Display the selected Article.

This action displays the Article similarly as for an Edit Action, except none of the fields are editable.

Useful for reviewing records without making any changes.

Edit

To start this action, select the Article you need to work on, and click the   ✏   button on that row.

Edits an existing Article.

When this action starts a form is displayed with the existing Article and any previous information entered.

Each field customises or controls some aspect of the Article display or behaviour.

When editing it is advisable to only change what is needed and most fields may not need to be changed. These other fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

Copy

To start this action, select the Article you need to work on, and click the   Copy   button in the   ⋮   More Menu on that row.

Copies an existing Article.

The selected Article is copied and the word (Copy) will be added to the name of the new Copy

Delete

To start this action, either select the Article to work on and click the   🗑   button on that row. Or CTRL+click to select multiple Articles and click the   🗑   button above the Article listing.

Deletes an existing Article.

When this action starts a screen is displayed to check for Confirmation before the Action continues.

On this screen a list of warnings may be provided to show the impact of deleting this Article.

Search

To start this action, click the   🔍   button above the Article listing.

Allows a Search of Articles.

This allows a simple text search across all Articles.

To search a specific field select the field from the drop down list

Adv. Search

To start this action, click the 🔍 Adv. Search button above the Article listing in the ⋮ More Menu.

Allows an Advanced Search of Articles.

The Advanced Search opens a new section at the bottom of the Articles and allows several distinct features:

- Multiple Search Lines : allows Article matches to be identified where more than one search criteria is required

- Nested Searches : allows a combination of AND and OR logic to find results

- Saved Filters : allows a search to be saved as a Filter

- Export : allows the results of the search to be exported and worked on separately

Refresh

To start this action, click the ↻ Refresh button above the Article listing in the ⋮ More Menu.

Refresh the list of Articles.

Allows the list of records to be refreshed.

Although the records in the system will automatically update if a another Admin is using the system at the same time, the Refresh button allows the list to be manually updated.

Export to List

To start this action, click the ☁ Export to List button above the Article listing in the ⋮ More Menu.

Export the Article results shown to a List.

An Export List can be downloaded as a CSV file, or through any number of customised Export Templates.

Export to List will begin the process of Exporting the Articles shown.

Once the data is exported it is available to download as a CSV file with all columns.

A list of Export Templates for Articles will be shown, select the Export Template to Print, Export to Document, Export to CSV or Email.

Before using a template an opportunity to amend the template is provided.

See Export Templates for more information on Managing Export Templates.

Export All

To start this action, click the ⤓ Export All button above the Article listing in the ⋮ More Menu.

Export all the Articles to a List.

Exactly as for "Export to List" except rather than just Exporting the Article results shown, all Articles will be expored.

Export Item

To start this action, select the Article you need to work on, and click the ☁ Export Item button in the ⋮ More Menu on that row.

Export only the selected Article to a List.

Exactly as for "Export to List" except rather than just Exporting the Article results shown, only the selected Article is exported.

Import Articles

To start this action, click the ☁ Import Articles button above the Article listing in the ⋮ More Menu.

Import Articles from a CSV file

Allows a CSV file of Articles to be imported to create individual Article records for each row.

See separate Import documentation.

Choose Columns

To start this action, click the ⚙ Choose Columns button above the Article listing in the ⋮ More Menu.

Changes the Columns shown in the Article Listing.

The Choose Columns screen shows the Selected Columns on the left, and the Article Columns available on the right.

Drag and Drop column names between the two columns.

Alternatively double click on a column name to move it from one list to the other.

On the left the Selected Columns can be dragged up and down to change the ordering in the Article Listing.

Manage Filters

To start this action, click the ⟱ Manage Filters button above the Article listing in the ⋮ More Menu.

Creates custom Filters for Articles.

A Filter is a saved Advanced Search. Multiple Filters can be created for Articles.

These Filters appear at the top of the Article listing.

When the Filter is selected the results are restricted to only include those which match the Filter.

The Manage Filters action shows a list of existing Filters for Articles where these can be managed.

Article Field Reference

By

The Source e.g. 'Reuters' or author e.g. 'Fred'

Summary

The first one or two lines of the article for display in the summary (list) view

Article Text

This field is mandatory.
Text of article to display

Short Article

This field is mandatory.
Set if no Summary is given and so the Article Text is displayed in an article listing

Use Toolbox Items

This field is mandatory.
e.g. Printer Friendly View, E-mail to a Friend and Social Bookmarking

Tags

Select the tags that allow this item to be found as a related item when another item is displayed

Find Others Mandatory Tags

When this item is displayed, another item will be found as a related item if it has ALL of these tags set

Find Others Option Tags

When this item is displayed, another item will be found as a related item if it has ANY OF these tags set. These tags operate in addition to any 'Find Others Mandatory Tags' set

Link names

Name(s) for direct hyperlinks to this item. Separate multiple link names with ';'. e.g. if 'fred;fred.html' is entered, entering a URL of $BASEURL$/fred or $BASEURL$/fred.html into a browser will show this item directly.

Additional Header Content

Advanced Use Only.
This content will be copied directly into the <head> section of the page's HTML.
A 'USE' macro can be used to copy the Additional Header Content from another item.
The format of the USE macro is $USE;Page:English/Who We Are/About Us$.
Where:
 Page - the type of item (e.g. Page, Product, Article)
 English/Who We Are/ - the names of the parent Pages (for Pages), or the category path (for Products, Articles etc.)
 About Us - the name of the item, e.g. the Page's 'Name' field or Article's 'Heading' field.
Where the Additional Header Content from the other item is wrapped in <nouse>....</nouse> tags then the section inside the <nouse> tags will be ignored.

Title

It is recommended to provide this field for Best Practice to improve each Article

Title displayed in title bar of browser. Defaults to Name if blank

As a guide a title of 55 characters with reasonably few capital letters is 95% likely to be viewable in Google results without being cut short

Description

It is recommended to provide this field for Best Practice to improve each Article

Search Engine Meta tag Description

Recommended maximum length 240 characters

Note: In 2017 and before the recommended limit was 150.

Add to Search Engine Site Map file

This field is mandatory.

It is recommended to provide this field for Best Practice to improve each Article

Set to add an entry to the file used by search engines to locate pages on the Web Site when published

Include in Search Database

This setting determines if the page appears in the search database and therefore can be found via a Site Search Item. If left as 'Default', the page will be included if 'Show on Site Menus' is set

Additional Search Text

Enter additional words, such as plurals or common misspellings, that are not part of the content to enable this item to be found using the site search facility

Engagement Score

Engagement score associated with viewing this item. Leave blank for default score

Post Types

Select the post types that can be used for this content item.

Detail Page

Select a page containing detailed information, downloads, etc. for the article if any

Attribute Set

The attributes in the selected attribute set will be made available to this item