User Manual

Version 3.5.*

KnowledgeTree™
Document Management Made Simple

KnowledgeTree User Manual V3.5.x

http://www.knowledgetree.com/

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Table of Contents

1 Welcome to KnowledgeTree

KnowledgeTree™ is document management made simple - easily share, track, secure, and manage the documents and records your organization depends on.

KnowledgeTree provides an easy-to-use, production-ready, enterprise document management solution for use by corporations, government institutions, medium to small businesses, and many other types of organizations. KnowledgeTree's open source architecture allows organizations to easily customize and integrate the document management system with their existing infrastructure, providing a more flexible, cost-effective alternative to proprietary applications.

To learn more about KnowledgeTree, call +1 415 692-1418, email sales@knowledgetree.com, or visit http://www.knowledgetree.com.

Features in Brief

KnowledgeTree provides:

- A central document repository with audited document content version control
- Powerful document metadata management and versioning
- Sophisticated document authoring management and workflows
- Full-text indexing technology allowing search within document contents
- Powerful security group and role-based security model and integration with enterprise directory servers

For more on KnowledgeTree's features, see the Product Overview and Features pages on the KnowledgeTree website.

2 About this Manual

The KnowledgeTree™ User Manual is a comprehensive reference for using the KnowledgeTree Document Management System. These instructions are intended for end users of the KnowledgeTree Document Management System.

Please Note - This release is a 'draft in progress' for KnowledgeTree 3.5.x series

This document is a working draft that is continually updated. We welcome your contributions to help us document KnowledgeTree. Please post your comments and suggestions by creating a Documentation ticket for the KnowledgeTree project on http://issues.knowledgetree.com.

The latest published version of this document is available at http://docs.knowledgetree.com/. Please also see the KnowledgeTree Wiki for updates, various articles, and the latest Release Notes.

3 Getting Help

KnowledgeTree provides professional support services to subscription customers. Our support service includes priority assistance from the KnowledgeTree support staff and engineers, with guaranteed response times.

Click here to find out more about more about KnowledgeTree's Commercial Support Services, or contact us for help with choosing the best support package for your needs.

Subscription Customers

You will receive an email with instructions for logging support requests with your KnowledgeTree license. You can also find out how to log a support request on the KnowledgeTree Wiki.

See also Getting Support on the KnowledgeTree Wiki.

Community Edition

Community support is available at the KnowledgeTree Community Forums. Post your questions at http://forums.knowledgetree.com/, where our support staff, developers, and a wide number of KnowledgeTree community members, endeavor to answer questions around installing, managing, and using the KnowledgeTree Document Management System.

Documentation

The following documentation is available from http://www.knowledgetree.com/documentation:

- KnowledgeTree Administrator Manual
- KnowledgeTree User Guide
- Getting Started with KnowledgeTreeLive
- KnowledgeTree Client Tools User Guide
- KnowledgeTree Document Workflow Integration (DWI) Service User Guide
- A Guide to the Integration Interfaces into KnowledgeTree
- A Guide to the Document Import Interfaces into KnowledgeTree

Don't see what you're looking for?

Try the following:

- Find all Community Resources listed at http://www.knowledgetree.com/community
- Review the Release Notes for your version
- Post your questions (and answers) at the KnowledgeTree Community Forum
- Request new features, or tell us about an error. How do I use KnowledgeTree's Issue Management System?

4 Introduction

4.1 Organizational Hierarchy

KnowledgeTree™ users are organized into Units, Groups, and Roles.

Permissions are allocated to groups and roles, and not to individual users. For this reason, each KnowledgeTree user must be added to a group, or to a role, before they are allowed access to content in the repository.

- Units - these are the top level folders that model the organization's logical business units, e.g. Marketing, Finance, Research and Development. Units are also used to create divisions based on, for example, geographical regions. Units may be internally administered - an administrative user (the Unit administrator) has the permissions of the KnowledgeTree system administrator, but only within their Unit.

- Groups - each group contains one or more users. Any user may belong to more than one group. Groups may also be allocated to Roles on a per-directory basis.

- Roles - roles are typically used to allocate permissions to an individual user, or a single group, who performs a specific task - e.g. editor, publisher, auditor. Roles are particularly useful in workflows.

Note: The KnowledgeTree system administrator creates, modifies, or deletes Units, Groups, and Roles.

Content Organization

KnowledgeTree uses metadata, and a flexible folder structure, to organize documents in the repository.

4.2 Security and Permissions

Access to content in the KnowledgeTree™ repository is controlled through the system's Permissions structure.

Permissions are set up at the following levels:

- Group - users are added to groups, and acquire the permissions assigned to the group

- Role - permissions are assigned to a role, and the role is assigned to a user to provide the user with the permissions allocated to the role.

- Folder - setting up permissions on a folder involves selecting the roles and groups who will be assigned permissions on that folder. By default, permissions set up on a parent folder apply also to its' child folders, and any changes made to the permissions of the parent folder are passed on to the child folders. This 'inherit permissions' feature may be disabled, and in this case, a custom permission set is set up on the child folder, which will apply only to that folder, including any

content in that folder.
Note: Only users who belong to groups and/or roles with the Manage Permissions permission on a folder may enable or disable 'inherit permissions' on that folder.

Viewing Permissions set up on a Folder

Non-administrative users use the Permissions link on the Folder Actions menu in Browse Documents to view the permissions set up on a specific folder.

The Permissions Set

KnowledgeTree provides the following core (default) permissions:

Permission	Description
Read	Allows users to view a document and its metadata. The Search and Browse function only returns content where the user has the 'read' permission.
Write	Allows users to change the content of a document and its metadata, to perform the check out / check in action, and to create new documents in folders where they have the 'write' permission.
Add Folder	Allows users to create and edit folders where they have this permission on the parent folder.
Manage Security	Allows users to configure and edit security options on the folder and on its' content, including edit permission and role allocations.
Delete	Allows users to delete files and folders where they have this permission on the parent folder. *Note: The Administrative user cannot delete immutable documents using the Delete button in Browse Documents, even when they're working in Administrator mode. Immutable documents can only be deleted when using the Delete action from the immutable document's Document Detail page. This ensures that immutable documents are only deleted one at a time, and avoids the mistaken deletion of an immutable document in a mass action delete.*
Manage Workflow	Allows users to change workflow settings on a document (e.g. perform a transition)
Folder Details	Allows users to view details related to the folder name, and to view a transaction history.
Rename Folder	Allows the user to rename a currently selected folder.

4.3 Version Control

KnowledgeTree includes the following version control mechanisms:

Check out	Checking out a document locks the file and makes it read only. Other users can view the file, but they cannot change it.
Check in	A file must be checked in to the repository to make it available to other users for editing. The cancel check out function reverses the check-out action, restoring the document to the state it was in before it was checked out. The system administrator is allowed to force check in a document. This is useful if a document is required urgently, and the user who checked out the document is unavailable to check it in.
Incremented Versions	By default, new documents are given version number 0.1. Each time a document is checked out, the version number increments by 0.1 if the change is minor - version 0.9 becomes 0.10, for example. If you indicated that the change is major, the version number increments by 1.0 - so, from 1.0 to 2.0, for example.
Version History	The Version History link in the Document info menu provides a history of version changes for the currently selected document.

5 Getting Started

5.1 Logging In: Web Interface

This procedure opens KnowledgeTree's Web-interface.

Prerequisites:

Before logging in, obtain your username and password from your system administrator.

Perform the following steps:

1. Use your Web browser to open KnowledgeTree's Login page.
   Note: Windows users - alternatively, use the Windows Start menu to open the KnowledgeTree Login page in your browser.

2. Enter your login details in the Username and Password fields.
   Note: Your username and your password are case-sensitive.

3. Click login to open the KnowledgeTree at the Dashboard.

See Also:

Working in the Web Interface

5.2 Logging In: KnowledgeTree Explorer

This procedure opens KnowledgeTree Explorer.

Pre-requisites:

- KnowledgeTree Commercial Edition Installed
- KnowledgeTree Commercial Edition license key installed
- KnowledgeTree Client Tools for Windows installed on the client machine where you're logging in.
- Valid connection configured with the KnowledgeTree server
  Note: Configuring a connection to the Web-based DMS allows you to see files and folders in the Explorer window. This connection is typically configured when installing KnowledgeTree
  Client Tools for Windows, and the Upgrade Installer saves previous configurations. If your password is not saved, you will need to re-enter logging in to KnowledgeTree Explorer.
- Your user profile added to KnowledgeTree and enabled

Note: Check with your KnowledgeTree system administrator if you're unsure whether or not your scenario meets all of these requirements for using KnowledgeTree Client Tools for Windows.

Perform the following steps:

1. Click the KnowledgeTree Explorer icon on your desktop, or click Start - Programs - KnowledgeTree Tools - KnowledgeTree Explorer to launch KnowledgeTree Explorer.

2. Is your connection with the KnowledgeTree Server successfully established?
   - Yes. Go to step 3.
   - No. The default connection may be unavailable. Request assistance from your KnowledgeTree administrator.

3. Was your password saved previously?
- Yes. Go to step 4.
- No. You will need to re-enter your password; then, go to step 4.

4. KnowledgeTree Explorer opens, displaying the files and folders that have loaded from the Web-based KnowledgeTree Document Management System.
   Note: KnowledgeTree Explorer displays the same file and folder hierarchy as in the KnowledgeTree DMS. This is a permissions-based view - you will only see the content for which you have at least 'read' permissions in the DMS.

See Also:
KnowledgeTree Client Tools for Windows
KnowledgeTree Explorer

5.3 Logging Out

To log out of KnowledgeTree's web interface, click the *Logout* button on the main toolbar.

Note: Your working session is set to time out automatically after a pre-defined period of inactivity in order to prevent unauthorized access to the DMS. If you are logged out through a time-out, you will need to use your username and password to log in, and the system re-opens at the page where your working session was suspended. When using the Logout button to end your session, the system re-opens at the Dashboard the next time you log on.

6 KnowledgeTree Client Tools for Windows

The KnowledgeTree Commercial Editions offer extended functionality through KnowledgeTree Client Tools for Windows - a set of client-side tools that provide a familiar Windows® Explorer and Microsoft® Office® view of the Web-based document repository.

KnowledgeTree Client Tools for Windows comprises:

- KnowledgeTree Explorer - an Explorer-type application that provides a file browser view of the document repository.
- KnowledgeTree Office Integration - a Microsoft Office add-in that adds KnowledgeTree buttons to the toolbar in Microsoft Office to provide you with direct access to KnowledgeTree from within Microsoft Office applications.
- KnowledgeTree Outlook Integration - an add-in that allows you to save your incoming and outgoing emails and attachments directly to KnowledgeTree, and to attach files from the repository to outgoing emails.
- KnowledgeTree Desktop Imaging - a tool used to scan documents directly into the KnowledgeTree repository from within KnowledgeTree Explorer.

Note: The KnowledgeTree Client Tools for Windows package is installed on each client machine requiring access to the repository.

6.1 KnowledgeTree Explorer

KnowledgeTree Explorer is the desktop user interface for the KnowledgeTree Client Tools for Windows. This interface provides a familiar, Explorer-type view of KnowledgeTree's Web-based repository, and allows you to work with content in the document management system, as though you're working on your local computer.

How do I log in to KnowledgeTree Explorer?

6.1.1 KnowledgeTree Explorer Main Interface

KnowledgeTree Explorer uses the same hierarchical file and folder structure as KnowledgeTree's Web-interface, in a familiar Explorer-type interface. Folders display in the left pane, and the contents of a currently selected folder displays in the right pane.

Right Pane Columns

The right pane in the KnowledgeTree Explorer interface provides the following columns:

Name	Content

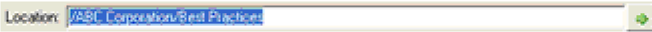
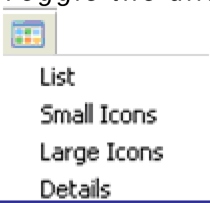
Filename	The unique name of the file on the file system.
Size	The size of the file.
Display Name	A user defined title for the document. This is the name that displays in the Title column in the Browse Documents tab of the Web interface of the DMS. The default is the filename.
Status	Defines whether or not the document is checked out, and by whom.
Permissions	Indicates the permissions of the logged in user on the currently selected file.
Type	The file type.
Modified	The last date this document was edited.
Modified By	The name of the last user who edited this document.
Created	The date this document was first added to the repository.
Created By	The KnowledgeTree user name of the user who added the document to the repository.
Description	A user defined description of the content of the file. The description defaults to the file name.

Toolbar: Menus, Fields, Buttons

The table describes the functionality available in the menus and buttons in the KnowledgeTree Explorer interface:

Click...			Result
Location menu	*Connect*		Opens the KnowledgeTree Server Connections dialog, where you can configure (add/remove/test) server connections with the KnowledgeTree Document Management System, or connect to the server.
	Browse	*Open KnowledgeTree*	Opens KnowledgeTree's Web interface.
		Show My Check-outs	Opens the Checked Out folder on your local computer - displays your currently checked out files.
		Show My Downloads	Opens the Downloaded folder on your local computer - displays files downloaded from the repository.
	New	*Document*	Allows you to navigate to a locally stored document that you want to add to the repository.

		Folder	Opens the Folder Properties dialog box - define a name for the folder you're adding; then, click Ok to add the folder.
	Refresh		Reloads content from the repository, providing an updated view.
	Close		Closes KnowledgeTree Explorer.
Tools menu	*Reload Tools*		If you have added plugins, clicking Reload Tools updates the plugins list, and activates the plugin to make it usable. *Note: By default, the plugins list is automatically updated when KnowledgeTree Explorer is closed. New plugins are activated the next time you open the system.*
	Scan Document into this location ...		Launches [KnowledgeTree Desktop Imaging](), and opens the native interface of your scanner hardware. Use this tool to scan hard-copy documents directly into the repository.
Help menu	*KnowledgeTree Commercial Support*		Opens KnowledgeTree's issue management system, where you can log an issue or request assistance.
	Online Manuals and User Guides		Opens the Manuals and User Guides page on the KnowledgeTree website, where you can choose the documentation you want to view online or download.
	Reactivate Hints		Activates the pop up hints that exist for some actions in KnowledgeTree Explorer.
	Network Diagnostics		Opens the operating system's Help and Support Center Network Diagnostics screen. Follow the onscreen instructions to perform a system scan on network usage and conditions. When scan completes, save the report to file for error analysis. *Note: You may be asked to send this file to a specific requesting member of KnowledgeTree Support. The file contains private information*

		about your network and should not be distributed to anyone other than the requesting KnowledgeTree support staff member.
	About KnowledgeTree	Loads the home page of the KnowledgeTree website.
	About KnowledgeTree Tools	Opens the system information screen for your version of KnowledgeTree Explorer.
Connect button 		Opens the KnowledgeTree Server Connections dialog box, where you can define or select the server connection to the Web-based KnowledgeTree repository.
Location field 		Displays the path to the currently selected file/folder. You can also type the path in this field and click the adjacent arrow to go directly to the specified file/folder.
Quick Search field  *Note: Advanced Search is currently not available in KnowledgeTree Client Tools for Windows.* *Note: KnowledgeTree is only able to search the text of scanned documents if you are using KnowledgeTree Tools with Microsoft Office 2003.*		Click in the field to specify a search term; then, click the adjacent search icon to display search results.
Copy 		Copies the item you select in the window to the clipboard.
Paste 		Pastes the item you copied or cut, from the clipboard.
Delete selected items 		Removes the items you selected from the server.
Toggle the different view modes 		Click the down arrow adjacent to the toolbar icon to select toggle options in the drop down menu.
Navigate to root folder		Goes to the root folder for the currently selected document or folder

Navigate to the current folders parent	Goes to the parent folder for the currently selected folder.
Toggle the left pane folder browser Folders	Toggles the left pane folder view to display or hide it.

Left Pane: Right Click Menu

The table describes the functionality available when right clicking on a folder in the left pane of the KnowledgeTree Explorer interface.

Click...	to ...
Open in Browser	open KnowledgeTree's Web-interface at the location of the currently selected file/folder. *Note: You need to enter your login credentials at the Login page to gain access to the repository via the Web interface.*
New Folder...	open the Folder Properties dialog box, where you can define a folder name; then, click Ok to add the folder.

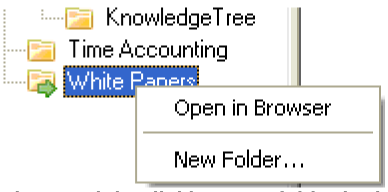


Figure: Right clicking on a folder in the left pane opens this menu.

Right Pane: Right Click Menu

The table describes the functionality available when right clicking on a folder in the right pane of the KnowledgeTree Explorer interface.

Select ...	... to
Open a read-only copy for viewing	... save a read-only copy of the file locally, to the My KnowledgeTree Downloads folder, and open the document.
Check-Out and Open for edit	... save a read/write copy of the file to the MyKnowledgeTreeDocuments \ CheckedOut folder and open the document. *Note: This action changes the status of the file in the repository to Checked out by ...[name of user].*
Open in KnowledgeTree Web	... open KnowledgeTree's Web-interface at the Login page. Log in to view the currently selected document's Display Details page in Browse Documents.
Browse My KnowledgeTree Documents	... open the My KnowledgeTree Documents folder, to access checked out and downloaded documents.
New Document	... navigate to a document on your local computer to add it to the KnowledgeTree repository.

	Folder	... open the Folder Properties dialog box. Define a folder name; then, click Ok to add the folder.
Save a copy Locally...		... open the My KnowledgeTree Documents\Downloaded folder in your operating system's Save As dialog box. Click Save to store the file at this location, or browse to select an alternative save location.
Copy URL		... place the URL link to the currently selected document onto your clipboard - e.g. http://localhost:8080/view.php?fDocumentId=4
Copy		... copy a read-only version of the currently selected document to the clipboard.
Paste		... paste a document you copied or cut from a location in KnowledgeTree Explorer another location on your local computer, or paste it elsewhere in KnowledgeTree Explorer.
Rename		... open the Details tab in the Document Properties dialog box, where you can change the document's short name, description, and file name. See also: Rename
Delete		... remove a currently selected document from the server. See also: Delete
Refresh		... update the document with any changes that have been made since you started your current working session in the repository.
Check-In		... check the document back into the repository from the CheckedOut folder on your local computer. See also: Check in
Check-Out to location		... check out a document to the CheckedOut folder on your local computer. See also: Check out *Note: Checked out documents are highlighted.*
Cancel Check-Out *Note: This option is enabled only if the document is currently checked out.*		... override the check-out status of the selected document and restore the pre-checkout version in the repository. Changes made to the local copy of the document are not saved. See also: Cancel Check out
Copy within KnowledgeTree		... open a new connection to KnowledgeTree Explorer. Navigate to the destination folder. Click Ok to complete the action.
Move within KnowledgeTree		... open a new connection to KnowledgeTree Explorer. Navigate to the new location for the document you're moving. Click Ok to complete this action.
Properties		... view/edit information about the currently selected

	document, in the Document Properties dialog box.

6.1.2 Viewing/Editing Document Properties

This procedure displays and edits information for a currently selected document in KnowledgeTree Explorer.

Perform the following steps:

1. Open KnowledgeTree Explorer.
2. Locate the document; then, right click to display right click menu options for the document.
3. On the right click menu, select Properties to open the Document Properties dialog box.
4. The following actions are available in the Document Properties dialog box.

Use this tabbed page ...	... to
Details	change the document display name
	change the document description
	change the file name
	view document properties *Note: The following information is displayed - file size, display name, status, permissions, file type, document type, last modified date, user responsible for last modification, author, description, document id, version, URLs to the KnowledgeTree server and to the location of the folder and file on the server.*
Workflow	select a workflow
	start a workflow
	view the document's current workflow state
Transactions	view a transaction history for the currently selected document
Versions	view a content and metadata version history for the currently selected document
Custom Properties	view the document metadata (the document type and associated metadata) *Note: The Categorized, Alphabetic, and Property Pages buttons are a filtering mechanism that allows the user to change the sort order of fields that are displayed in the Properties section.*
	change the document type and associated metadata

	Note: When changing a document type, previously stored metadata is lost. *The fields that display for the selected document type are predefined by the KnowledgeTree administrator and are not user-configurable. Only the actual metadata in a field is editable on this tab - e.g. it's possible to change the name in the 'Author' field, but you can't remove the 'Author' field.* *Note: To change the metadata for a field, select the field in the Properties section; then, tab to the right of the field where you can define or select alternative metadata for the field.*

6.1.2.1 Document Properties Dialog Box

The Document Properties dialog box displays information on a currently selected document, and allows some editing.

To open the Document Properties dialog box, right click on a document in the right pane of KnowledgeTree Explorer; then, select Properties.

You can select the following tabs in this dialog box:

- Details tab
- Workflow tab
- Transactions tab
- Versions tab
- Custom Properties tab

Details Tab

Use this tabbed page to view/edit the document display name, file name, and various document properties and their values.

The following information is editable on the Details tab:

- display name
- description
- file name

The following document properties and their values are displayed on this tabbed page:

- the size of the file
- the display name
- document status - checked out or checked in
- permissions that this user has on the document
- the document file type
- the KnowledgeTree document type
- the date this document was last modified
- the user who last modified this document
- the document author

- description of the content
- document ID
- version number
- content author
- the URL of the document on the KnowledgeTree server
- the URL for the document's folder location on the KnowledgeTree server
- the KnowledgeTree URL

Workflow Tab

This tab displays the document's workflow, and the current workflow state. You can also select and start a workflow on the currently selected document.

Starting a Workflow

To start a workflow on the currently selected document, select a workflow from the Workflow drop down menu; then, click Start Workflow.

Viewing the current workflow state

If the document is already in a workflow, view the current workflow state on this tabbed page.

Transactions Tab

This tab displays details of all transactions that have occurred on the document since it was added to the repository - information includes: username, action, date, comment.

Versions Tab

This tabbed page displays all content and metadata version information on the currently selected document, including user name, content version number, metadata version number, date, filename, file size.

Custom Properties Tab

This tab displays the current document type and its associated metadata (the predefined fields and fieldsets associated with the document type), and tag words. You can use this tabbed page to change the document type, add/edit field values, and add tags.

Changing the document type and metadata

To change the document's document type and associated metadata:

1. Click the Document Type down arrow to display available options.
2. Select a document type from the list; then, click Update.
3. The metadata fields associated with the new document type now populate the Properties section of the dialog box.
4. Select a field to add/edit metadata - use the tab key to add/edit metadata values on the right of the field. Select Tag; then, use the tab key to add/edit tag words on the right of the field.

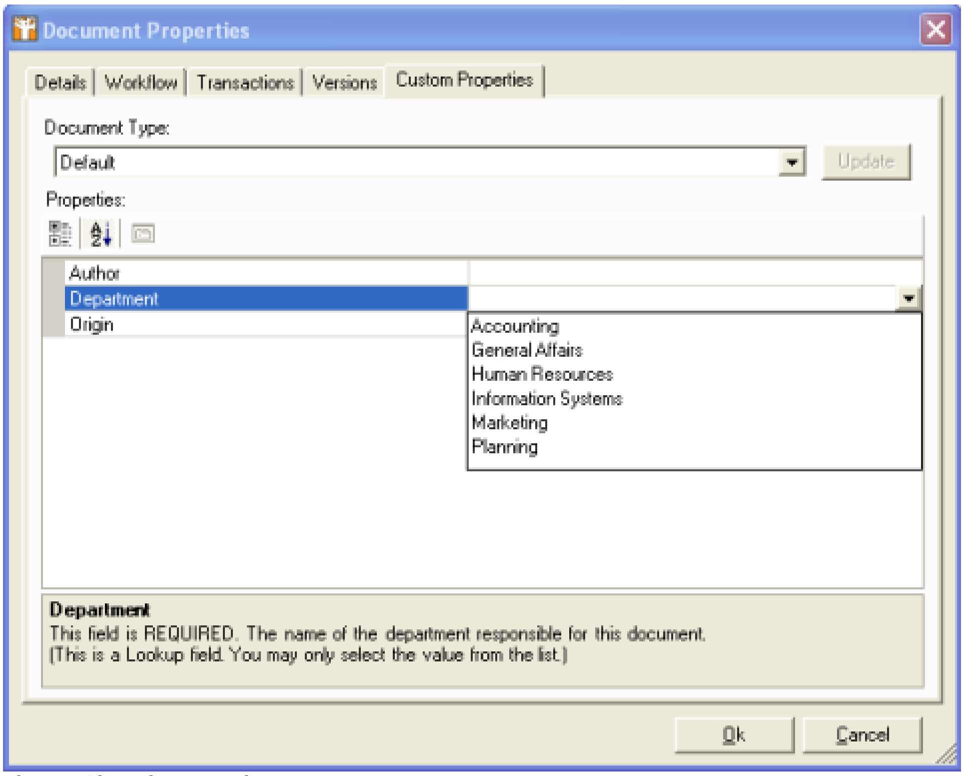


Figure: Changing metadata

6.2 KnowledgeTree Office Integration

KnowledgeTree Office Integration (the Office Add-in) is a component of the KnowledgeTree Client Tools for Windows. This tool allows you to access documents in the repository, and to save documents to the repository, from within Microsoft Office applications - including PowerPoint, Excel, and Word.

Keyboard Shortcuts

The table describes the keyboard shortcuts available for working with the KnowledgeTree Client Tools for Windows from within Microsoft Office:

Shortcut	Action
Alt+P	Opens the KnowledgeTree File dialog box, where you can navigate to the file in the repository to open it from within the currently open Microsoft Office application (Excel, Word, PowerPoint, Visio)
Alt+S	Saves a local copy of a currently open Microsoft Office document, and checks the file in to the KnowledgeTree repository.
Alt+K	Opens the drop-down KnowledgeTree menu in a currently open Microsoft application.

Toolbar: KnowledgeTree menu

The table describes the functionality available in the KnowledgeTree menu in Microsoft Office.

Click	... then select	Result
KnowledgeTree menu *Note: Alternatively, use the keyboard shortcut Alt+K - opens the drop down KnowledgeTree menu in Microsoft Office.*	*Open* *Note: Alternatively, use the keyboard shortcut Alt+P*	Opens the KnowledgeTree File dialog - navigate to the file you want to open in Microsoft Office.
	Save As *Note: Alternatively, use the keyboard shortcut Alt+S*	Saves a local copy of the file, and checks in/adds the currently open document to the repository.
	Save *Note: Alternatively, use the keyboard shortcut Alt+S*	Checks in/adds the currently open document to the KnowledgeTree repository.
	Update Properties	Updates the Microsoft Office metadata of the local copy of the open document with the metadata properties that are currently recorded for the version of this document that is stored in the repository.
	Browse	Launches an active working session within the KnowledgeTree Explorer interface of the DMS, allowing the currently logged in user to work with content in the repository.
	KnowledgeTree Online	Launches the KnowledgeTree website.
	My Connections	Opens the KnowledgeTree Server Connections dialog box, where you can add new server connections, or modify or remove existing server connections.
	About KnowledgeTree Tools	Opens a system screen that provides information about the currently installed version of KnowledgeTree Explorer.

KnowledgeTree Toolbar Buttons

The table describes the functionality available through the KnowledgeTree buttons in Microsoft Office.

Click	... to
KnowledgeTree Open *Note: Alternatively, use the keyboard shortcut Alt+P*	... open the KnowledgeTree File ... dialog box to locate the file you want to open in Microsoft Office. The file is checked out to the .../CheckedOut folder on your hard drive, and the file is opened in Microsoft Office for editing. The status of this file in the repository is set to Checked out by ...[name of user who checked out the file].
KnowledgeTree Save	... check in the currently open Office document back to the repository, and change the file on your hard drive to read only.

Note: Alternatively, use the keyboard shortcut Alt+S	

6.2.1 Using KnowledgeTree Office Integration

This topic describes the functionality available in the KnowledgeTree menu and buttons that are added to the toolbar in Microsoft Office to provide integration between KnowledgeTree and Microsoft Office applications.

6.2.1.1 Opening / Checking out Documents from within Office

This procedure checks a file out of KnowledgeTree from within Microsoft Office, and opens the file for editing in Office.

Perform the following steps:

1. Open Microsoft Office.

2. Click KnowledgeTree Open (a button on the taskbar) to open the KnowledgeTree File dialog box.

3. Navigate through the folder structure in the document management system to the file you want to open/check out. When you have found the file, select it; then, click Ok.

6.2.1.2 Adding / Checking in Documents to KnowledgeTree from Office

This procedure checks in a currently checked out file, and adds new files to KnowledgeTree from within Microsoft Office applications - either PowerPoint, Excel, or Word.

Perform the following steps:

1. Open the file in Microsoft Office.

2. Click KnowledgeTree Save on the Office application's toolbar.

3. Is this the first time you're adding this file to the repository?
   - Yes. A system message advises that the file is new, and that you need to select a storage location in the repository. Click Ok to open the KnowledgeTree File dialog box in KnowledgeTree Explorer.

- No. Go to step 4.

4. Are you logged in to KnowledgeTree Explorer?
   - No. The KnowledgeTree Server Connections dialog box opens. Select the server connection to use. Enter your username and password; then, click Connect to open the KnowledgeTree File... dialog box. Go to step 5.
   - Yes. The KnowledgeTree File... dialog box opens immediately. Go to step 5.
5. Select the required destination folder; then, click OK.

6.3 KnowledgeTree Desktop Imaging

KnowledgeTree Desktop Imaging is a scanning tool in the KnowledgeTree Client Tools for Windows toolset that allows you to scan documents directly into the KnowledgeTree repository from within KnowledgeTree Explorer.

This topic addresses the following questions:

- How are images acquired?
- Can I re-order scanned images?
- How are scanned images compiled and uploaded to KnowledgeTree?

How are images acquired?

Images are acquired from an external imaging device (scanner), in one or both of the following ways:

- one page, manually - place the page you want to scan face down on the scanner flatbed, then launch the Document Imaging Scan Wizard.
- multiple pages, automatically - if your scanner has an Automatic Document Feeder (ADF), you can place all pages in the ADF tray attached to your scanner; then, launch the Scan Wizard. All pages are scanned in and can be viewed by browsing from one image to the next using a View Previous/View Next function.

Note: You can only specify whether to scan pages from the flatbed or ADF if your imaging device includes both of these options.

Can I re-order scanned images?

During scanning (i.e. after a page is scanned, but before the document is saved and submitted to KnowledgeTree), the Desktop Imaging tool maintains a queue of scanned pages. An onscreen counter displays the number of images in the queue (e.g. page 1 of 1; or, page 5 or 10, etc.).

You can't change the order of pages that have already been scanned and are in the queue in a particular order, but you can remove or add pages anywhere in the queue. KnowledgeTree Desktop Imaging includes Insert Pages Before/Insert Pages After buttons that allows scanning of pages anywhere into an existing queue. So, lets say you scanned pages in the wrong order - i.e. page 2, then page 1. And let's say page 1 and page 2 are part of a document of 18 pages in total. You won't need to re-scan the entire document, just delete page 1 and page 2 and then re-scan those two pages, one at a time, to the correct location in the document.

You can:
- view any image in the queue
- delete an image from the queue
- insert images at any point in the queue

How are scanned images compiled and uploaded to KnowledgeTree?

Having scanned all the required pages, the user defines a document title, file type, document type, and the destination folder location.

Note: KnowledgeTree allows you to select the document type after saving the document. Currently (September 2007), KnowledgeTree Desktop Imaging provides the option of saving scanned images as file type PDF or TIFF, and document type Default. Additional options will be built into later releases of the tool. Check the KnowledgeTree website for updates.

6.3.1 Searching and Scanned Documents

KnowledgeTree Desktop Imaging allows you to save scanned documents as multi-page TIFF images, or as PDF documents. In both scenarios, image (picture) data is saved to KnowledgeTree.

The text content of TIFFs is not searchable at all in KnowledgeTree, the text of documents saved as PDFs is searchable, to some extent.

Searching and PDFs

For indexing purposes, KnowledgeTree's Desktop Imaging performs Optical Character Recognition (OCR) on the scanned images of PDF documents, using the Microsoft MODI module (only available to users of Office 2003). During this process, the text, which is not displayed or viewable in a PDF Reader, is extracted from each image.

Note: KnowledgeTree Desktop Imaging's OCR process requires Office 2003.

The OCR process may fail, or partially fail, for various reasons, including:
- noise in the image
- level of contrast
- rotation of the image
- missing words or incorrect spelling

Any of the above factors are likely to reduce the reliability of searching scanned PDFs.

How do I scan documents using KnowledgeTree Desktop Imaging?

6.3.2 Scanning Documents

This procedure scans one or more pages from your imaging device (scanner) directly into the KnowledgeTree Document Management System.

Pre-requisites
- KnowledgeTree Commercial Edition installed
- KnowledgeTree Tools installed
- Valid connection to KnowledgeTree Explorer
- Your user profile added and enabled in the system
- External Twain-compliant imaging device (scanner), connected to your computer

Perform the following steps:
1. Log in to KnowledgeTree Explorer.

2. Are you using ...

   - a flatbed scanner? Place the first page face down on the flatbed. Go to step 3.
     Note: You can only scan one page at a time when using a flatbed.

   - a scanner with an Automatic Document Feeder (ADF)? Place all pages, in the correct order, into the tray attached to the scanner. Go to step 3.
     Note: If your scanner has flatbed and ADF functionality and you're scanning from the ADF, please note that some scanners with this dual input functionality are unable to scan successfully from the ADF while there are pages still lying on the flatbed. This is a hardware issue related to your imaging device that can be corrected by removing the pages from the flatbed when scanning from the ADF. The problem occurs when pages on the flatbed obscure the scanner light, and prevent light from reaching the ADF feeder aperture.

3. Click the Tools menu; then, select Scan Documents into this location to open KnowledgeTree Desktop Imaging.

4. Click Launch Scan Wizard to open your scanner's user interface.
   Note: The KnowledgeTree Desktop Imaging tool's scan function applies the options you define in your scanner's native GUI.

5. Define scan options on the page; then, perform the scan.
   Note: The scanner interface that displays is specific to your external device. Refer to your scanner documentation for more information about defining scan options on this interface.

6. When the page/s have scanned, KnowledgeTree Desktop Imaging's Scanner Wizard opens Review Pages, where you can view all the pages you scanned for this document.

7. Do you need to scan more pages before uploading the document?

   - Yes. View the pages already scanned to decide on the location of the next scanned page/s - use the View Previous Page / View Next Page buttons to 'page' through the current order of scanned pages; then, click Insert Pages Before Here / Insert Pages After Here to scan the new page/s to the correct location in the queue. Go to step 5.

- No. Go to step 5.

8. Click Continue to open the Metadata page of the Document Scanner Wizard.

9. Enter the title of the document in the Document Title field; then, select a File Type - pdf or TIFF.

10. Click Continue to submit the file to the repository.

11. The Document Properties dialog box opens. Define metadata for the document on the tabbed pages of this dialog box.

10. Select the destination folder location; then, click OK.
 A system message confirms that the document has been checked in to KnowledgeTree.
 Note: All scanned documents are added to the repository, where they are available for download, check out, email, etc. (depending on the permissions set for different users).

6.4 KnowledgeTree Outlook Integration

KnowledgeTree Outlook Integration provides integration between Microsoft Outlook and the KnowledgeTree repository through a KnowledgeTree menu and KnowledgeTree buttons added to the Microsoft Outlook interface.

Note: The Outlook user interface has two levels, or windows. The main (explorer) window loads when Microsoft Outlook starts. The Inspector window opens when an email item is opened.

Key Features

The table describes the functionality available with KnowledgeTree Outlook Integration:

Feature	Function
email archiving (including attachments)	Saves emails, including attachments, to a user-selected or predefined location in the KnowledgeTree repository. *Note: This feature allows you to optionally add metadata.*
Attach files from the repository	Allows the user to locate a file in the repository, from within Outlook, to attach to an outgoing email.
Email archive prompt	Configure KnowledgeTree Outlook Integration repository configuration settings to define whether or not to display a system message that asks the user whether or not they want to save (archive) an unsaved email message that they're attempting to

	close.
Email metadata	Extracts and populates the following email metadata in KnowledgeTree: Subject, To, CC, Date, Sent. *Note: The KnowledgeTree administrator defines Email document types on the server - this allows the setting of the metadata to KnowledgeTree.*

The User Interface

The KnowledgeTree Client Tools for Windows installer adds KnowledgeTree buttons and a KnowledgeTree menu to the Microsoft Outlook toolbar:

<table>
<tr><td>KnowledgeTree Save Email button</td><td colspan="2">The KnowledgeTree Save Email button saves the currently selected, unsaved email to the KnowledgeTree repository.</td></tr>
<tr><td>KnowledgeTree Save Attachment button</td><td colspan="2">The KnowledgeTree Save Attachment button saves attachments to the repository. A system dialog allows you to select a location when saving the attachment.</td></tr>
<tr><td colspan="3">

Figure: KnowledgeTree buttons in Outlook</td></tr>
<tr><td colspan="2">KnowledgeTree Attach Files</td><td>When composing an outgoing email message, this button opens KnowledgeTree Explorer, where you can locate a file to attach to your message.</td></tr>
<tr><td rowspan="3">KnowledgeTree menu

Note: Use the following keyboard shortcut to open the KnowledgeTree menu in Outlook: Alt+K</td><td>Email Repository Settings</td><td>This menu item opens the Email Repository Settings dialog box to define the following settings:
• location of the KnowledgeTree server
• location of the folder used to store emails
• the default email document type
• whether or not to display Save prompt
• whether or not to disable automatic Save</td></tr>
<tr><td>KnowledgeTree Online</td><td>The menu item opens the KnowledgeTree website.</td></tr>
<tr><td>About KnowledgeTree Tools</td><td>This menu item displays system information relevant to the currently installed version of KnowledgeTree Client Tools for Windows.</td></tr>
</table>

Note:
The KnowledgeTree buttons on the Outlook toolbar are enabled only when the currently selected email allows the functionality provided through the toolbar button. For example, KnowledgeTree Save Email is enabled only when you have selected a previously unsaved email; and, when selecting a saved email that contains an unsaved attachment, only the KnowledgeTree Save Attachment button is enabled.

Note: KnowledgeTree Outlook actions (e.g. save emails / save attachments) may be performed on a maximum of 10 simultaneously selected emails.

6.4.1 Configuring Email Repository Settings

This procedure defines Email Repository settings for KnowledgeTree Outlook Integration.

Pre-requisites:

- KnowledgeTree Client Tools for Windows installed on your machine

Perform the following steps:

1. Open Microsoft Outlook.

2. Click KnowledgeTree - Email Repository Settings to open the KnowledgeTree Email Repository Settings dialog box.

3. Do you want to ...

   3.1. define or change the KnowledgeTree server and/or the folder location used by Outlook? Click Browse to open the KnowledgeTree Server Connections dialog box. Select an existing server connection, or add a new server connection. Enter your login username and password; then, click Connect. On the Select Email Repository Folder dialog, browse to locate the folder for emails.
   Note: For more information on configuring Server connections, see the KnowledgeTree Installation Guide.

   3.2. change the document type to use as the default document type for saved emails? Click the down arrow at the Document Type pick list to select a predefined Email document type from the list.
   Note: The pick list is populated only when there is a valid and connection to KnowledgeTree. Only email document types that are configured on the selected server are included in the list. When no Email document types are defined on the Server, the system automatically saves the email as a general KnowledgeTree default document type. See the KnowledgeTree Administrator Manual for more information about Email Document Types (a document type created for saving emails).

   3.3. define whether or not the system displays a prompt to select a document types when saving emails to KnowledgeTree? Select or deselect the Prompt to Save to KnowledgeTree? check box to define whether or not to enable this feature.
   Note: When this check box is de-selected, the system saves emails to the default folder location specified in the KnowledgeTree Folder field of this dialog. When this check box is selected, you will be asked to specify a folder location for the email you're saving.

   3.4. define whether or not to disable automatic saving of emails to KnowledgeTree? Select the Disable Automatic Saving of Emails to KnowledgeTree check box to activate automatic saving of emails to the repository. Deselect the check box to specify save settings manually.

4. Click Ok.

6.4.2 Attaching Files from KnowledgeTree to Outgoing Emails

This procedure retrieves a file from the KnowledgeTree repository, and attaches the file to an outgoing email message.

Perform the following steps:

1. Compose a new email message in Microsoft Outlook.

2. Click KnowledgeTree Attach Files.

3. Are you currently connected to KnowledgeTree?
   - Yes. The Select files to attach to the email dialog box opens. Go to step 4.

   - No. The KnowledgTree Server Connections dialog box opens. Select the server; then, enter your username and password. Click Ok to open the Select files to attach to the email dialog box. Go to step 4.

4. Navigate to the required file; then, click Ok.

5. Verify that the file was added to the Attach header field in the outgoing message.

6.4.3 Known Issues in this Version

Configuring Outlook as the Editor for Email Messages Hides KnowledgeTree Outlook

Integration buttons in the Inspector Window

When using Microsoft Office or Microsoft XP to read rich text emails, the KnowledgeTree Save
Email button and the KnowledgeTree Attach Files button are not displayed on the email inspector window. To resolve this issue, change the editor for email messages; or, save emails and attachments from the Outlook Explorer window.

To change the editor for email messages in Microsoft Outlook, click Tools - Options to open the Options dialog box. Then, click the Mail Format tab to open the Mail Format tabbed page, where you deselect Use Microsoft [Office 2003 / XP] to read Rich Text e-mail messages.

7 Working in the Web Interface

This chapter is a reference guide to using the functionality in KnowledgeTree's web interface.

Non-administrative users have access to the following tabs in the Web interface:

- Dashboard - the main page of KnowledgeTree's web interface, providing access to RSS Feeds, Tag Clouds, Search, and links to various documents (recently checked out / quicklinks, etc.)
- Browse Documents - provides access to the repository folder structure and content in the document management system, including folder and document actions.
- Preferences - use this tab to define or edit your KnowledgeTree user profile, including your password.
- About - displays copyright information, contact information for KnowledgeTree Sales, links to resources, contributor acknowledgements, and links to the third party software used in KnowledgeTree.
- Logout - use this button to end your current working session

7.1 Dashboard

KnowledgeTree's Web interface opens at the Dashboard.

The Dashboard displays items relevant to your login profile, such as a list of the documents you have checked out, and items requiring your attention.

The following Dashlets may be visible, depending on your login profile:

Dashlet	Description
Search	Use the Search bar to perform simple or advanced searches of the repository.
Welcome ...	A Welcome message for your organization's implementation of the document management system. The administrative user may customize this message or display the default text.
RSS Feeds	Use this dashlet to set up RSS feeds
WebDAV Connection Information	Provides the addresses to use to connect to KnowledgeTree Client Tools for Windows.
Go to Document ID	Use this dashlet to go directly to a specific document in the repository, based on the document's numeric identifier.
Top Downloads	Displays a list of the 5 most downloaded documents, by any KnowledgeTree user in your organization, for the past 7 days. Only documents for which you have at least the 'read'

	permission is displayed in the list that displays on your Dashboard.
Tag Cloud	Displays all user-defined tag words for your organization's implementation of the repository (displayed tags were added by users to document metadata). Clicking on a tag word displays a list of all documents (for which you have at least 'read' permissions), where this tag is defined as part of the document metadata.
Orphaned folders	Lists any folders where you cannot browse to those folders through the folder hierarchy due to permission restrictions. Click on link to the folder to go directly to the folder in the repository.
Recently Added/ Changed Documents	A permissions-based list of the 5 most recently added or modified documents in the repository. The list includes documents added or modified by any KnowledgeTree user, and includes only those documents for which you have at least 'read' permissions.
Your Checked-out Documents	Lists the documents that you currently have checked out of the repository. Click on the link to go directly to this document in the repository, where you can download the document to view it, check the document back in, or cancel the document check out.
Recently Viewed Items	Lists the last 5 documents and 5 folders that were viewed by you (the currently logged in user).
Quicklinks	A list of documents that you require quick access to - the links in the Quicklinks dashlet allow you to go directly to the document.

7.1.1 Configuring Dashlets

This procedure customizes dashlets on the KnowledgeTree Dashboard.

Perform the following steps:

1. Log in to KnowledgeTree's Web interface. The system opens at the Dashboard.
2. Do you want to ...
   - move a dashlet to another location on the page? Left click on the dashlet; then, hold down the mouse button while dragging the dashlet. Release the mouse button when the dashlet is positioned as required.
   - temporarily remove the dashlet from the dashboard? Click the dashlet's *Close* button.
   - display a hidden dashlet? Click *Add Dashlet* to display a list of hidden dashlets; then, click on an item in the list to display the required dashlet. Click *close* to close the Add Dashlet screen.
   - minimize the dashlet to hide the dashlet informational text? Click the

dashlet's *minimize* button.

- display hidden dashlet text? Click the dashlet's *maximize* button.

7.1.2 Configuring Quicklinks

This procedure adds new Quicklinks and edits the order of displayed Quicklinks on the Dashboard.

Perform the following steps:

1. Log in to KnowledgeTree's Web interface. The system opens at the Dashboard.

2. In the Quicklinks dashlet click Manage Quicklinks to open the Quicklinks configuration screen.

3. Do you want to ...
   - add new quicklinks? Click Create a new quicklink to open the New Quicklink page. Browse the folder collection to find the target folder or document for this quicklink. When you're done, click Link. The quicklink displays on the Manage Quicklinks page, and on the Dashboard.

   - change the list order of existing quicklinks? Click Re-order quicklinks to open the Re-order Quicklinks page. View the current order of links; then, use the up and down arrows in the table to change the list order or links that are listed in the Item column. When you're done, click Re-order.

7.1.3 Notifications and Alerts

Notifications are system-generated messages that display on the Dashboard to inform you of relevant changes and events related to the system or to content in the repository.

KnowledgeTree also provides an email notification feature that can be switched on - in the Preferences tab - so that you will receive your notifications by email.

Two types of default notifications in KnowledgeTree:

- Subscription alerts - informs you when a document (including document metadata), or a folder that you're watching, is checked out, or deleted, or if it changes in some other way.

- Workflow alerts - informs you when a workflow that you're involved with has reached a certain state. Notifications can also be triggered when you are assigned a Role for the next step in the process for a document in a Collaboration workflow.

7.1.4 Tag Clouds

Tag Clouds are a method of sorting and finding repository content based on predefined, custom, categories - i.e. tags. Metadata tags are typically keywords that are associated with a document or folder.

The Tag Cloud dashlet on the Dashboard displays all unique tags added by users in the organization. Tagging is a collaborative effort - any logged in user can view all the tags added by other users of the document management system. This allows an intuitive organization of repository content, based on the collective understanding of user's in the organization, and often mimics the organization's 'way of working'.

Clicking on a Tag launches a search action that returns a permissions-based list of all content that is associated with the currently selected Tag. 'Tagging' and Tag Clouds thus provide users with a visual overview of the type of content in the document repository.

7.1.4.1 Adding Tags

This procedure adds new tags and creates a Tag Cloud.

Pre-requisite:

- Tag Cloud plugin - installed and enabled (this ensures that the Tag Cloud dashlet displays on the Dashboard)

Perform the following steps:

1. Login to the Browse Documents section of KnowledgeTree's Web interface.

2. Navigate to the relevant document's Details page; then, click Edit Metadata.

3. Add tags in the Tag Words field.

4. Re-open the Dashboard to verify that the tags you added to the document metadata displays as tag links in the Tag Cloud dashlet on the Dashboard.

7.1.4.2 Using Tags

This procedures uses Tags to find associated content in the repository.

Perform the following steps:

1. Log in to KnowledgeTree's Web interface.

2. The system opens at the Dashboard.

3. Locate the Tag Cloud dashlet.

4. Click on a Tag to start the search.

5. The system displays a permissions-based list of all content that is associated with the selected Tag.

Note: Tags return results based on documents that contain the tag in text content, and not in the document file name or title.

7.1.5 RSS Feeds

RSS technology allows you to set up subscribe to content on the Internet, and to content in the KnowledgeTree repository.

RSS Feeds Dashlet

The RSS Feeds dashlet on the KnowledgeTree Dashboard displays a list, in a drop down menu, of your RSS Feeds to external content - e.g. to websites, webpages, blogs, etc. outside of the repository. Internal RSS Feeds may also be set up on content in the repository, and these RSS Feeds display on the RSS Feeds dashlet, and provide information on the documents in the folder where you have the RSS Feed set up.

RSS, and KnowledgeTree Security

KnowledgeTree RSS uses http authentication to protect content in the repository from unauthorized and/or anonymous access. You will therefore only be able to access RSS Feeds on those documents and folders where you have at least view permissions defined in the DMS, for your user profile, and specific to the content you're attempting to access through the RSS Feed. For this reason, you will need to enter your KnowledgeTree username and password when subscribing to a RSS Feed.

How can I set up RSS Feeds in KnowledgeTree?

There are three ways to use RSS Feeds in KnowledgeTree:

1. Set up External RSS Feeds: To subscribe to external content (news, blogs, etc.) from within KnowledgeTree, click *Manage External RSS Feeds* on the RSS Feeds dashlet.

2. Subscribe to a document or folder in the repository: You will be notified via RSS Feed when actions are occur on the document or folder. These internal RSS feeds display on the RSS Feeds dashlet.

3. Set up an RSS feed on a document or folder, and use an external RSS Reader to monitor this content from outside the DMS. To do this, browse to the document or folder in KnowledgeTree; then, click the *RSS* icon in Actions on this Folder / Document Actions (as applicable) in Browse Documents. Copy and paste the system generated link into an RSS aggregator to create the feed. You will be notified of any changes on the document or folder via the RSS feed.

   Note: Ensure that your RSS reader is RSS 2.0 compatible.

See Also:

- Configuring External RSS Feeds

- Adding Internal RSS Feeds

7.1.5.1 Configuring External RSS Feeds

This procedure displays, edit, and deletes existing RSS feeds, and adds new RSS feeds.

Perform the following steps:

1. Log in to KnowledgeTree's Web interface.

2. Do you want to ...
   - view, edit, delete, add RSS Feeds for external content, or view your internal RSS Feeds? Locate the RSS Feeds dashlet on the KnowledgeTree Dashboard; then, go to step 3.

   - set up a RSS Feed on a document or folder in the repository in order to monitor and receive RSS Feeds on this content from outside of the DMS? Go to step 4.

3. Do you want to ...
   - display an existing, external RSS Feed? Click the down arrow at the RSS Feeds drop down menu; then, select the RSS feed you want to view.

   - add a new, external RSS feed? Click Manage External RSS Feeds to open the Manage RSS Feeds page. Click Create a link to a new RSS Feed to open the New RSS Feed page; then, enter a title for the RSS feed in the Title field, and enter the URL to the RSS feed in the URL field. Click Create. The new RSS feed displays in a list of existing RSS feeds on the Manage RSS Feeds page, and is added to the RSS Feeds menu on the Dashboard.

   - edit an existing, external RSS feed? Click Manage External RSS Feeds to open the Manage RSS Feeds page. Click the Edit icon for the relevant RSS feed to open the Edit RSS Feed page. View and/or change the RSS Feed title and/or the URL; then, when you're done, click Save changes.

   - remove an existing, external RSS feed? Click Manage External RSS Feeds to open the Manage RSS Feeds page. View the list of existing external RSS Feeds; then, click the Delete icon for the RSS feed you're removing from this list.

   - set up an RSS feed on a document or folder in the repository for external viewing? Locate the document or folder in the repository; then, click RSS in the Document actions menu. The system generates the RSS link for the document/folder. Copy the link into your external RSS reader to create a feed to the selected document or folder.
     Note: Ensure that your RSS reader is RSS 2.0 compatible.

7.1.5.2 Adding Internal RSS Feeds

This procedure creates an internal RSS Feed.

Pre-requisite:
- RSS Feed reader, installed.

Perform the following steps:
1. Login to KnowledgeTree's Web interface; then, click Browse Documents to enter the repository folder structure.

2. Locate the document or folder where you're subscribing to the RSS Feed.

3. Click the RSS icon on the left of the page.

4. If authentication is required, you will need to enter your username and password.

5. Select your preferred RSS reader / aggregator.

6. Click Subscribe now.

7. Add the RSS Feed.

8. Subscribe to the selected document or folder; then, go to step 5.
   Note: Access the Subscriptions functionality in the Subscriptions menu on the page.

9. An internal RSS Feed on the document is automatically created once you have set up your subscription. RSS Feeds on the document or folder display on the RSS Feeds dashlet on the KnowledgeTree Dashboard.

7.2 Browse Documents

Browse Documents provides access to the folder structure, where you can work with documents and folders in the Web interface of the repository, and browse repository content.

Browse Views

You can choose how you wish to browse the repository:

- Folder - this is the default view, where the right pane of the Browse Documents page displays the folder structure. Click on a folder to view its content, or to drill down further into the KnowledgeTree folder structure.
- Document Type - this view allows you to select a document type, to view only documents of a selected type.
- Lookup Value - this view allows you to select a lookup field and associated value, and view only those documents that have this lookup field and value.

Go to Browse by... for more information on the Browse Views.

7.2.1 Working with Folders

You use the About this folder and the Actions on this folder menus in the Folder View of Browse Documents to work with folders.

Note: Only those actions for which the currently logged in user has permissions on the current folder display in the menu.

About this folder

- Display Details - the default view of the folder, shows folder content and details
- Folder Transactions - displays a transaction history for the currently selected folder

Actions on this folder

- Add Document
- Add a Folder
- Allocate Roles
- Bulk Download
- Bulk Upload
- RSS
- Rename
- Usage Information

7.2.1.1 Viewing Folders

This procedure displays the content in a currently selected folder, including information about folder contents.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, click *Browse Documents* to enter the folder structure.

2. By default, when opening Browse Documents, the repository content opens in folder view, starting with the root folder, and Display Details is the default view.

3. To drill down further into the folder structure, click on a folder to view it's contents; then, drill down further as required until you reach the folder you require - alternatively, use Search to locate the folder.

4. Having located the folder, the system presents the default Display Details view in the About the folder menu (on the top left of the page in Browse Documents), which provides a list of the folder contents, and includes the following details:

Column	Description
Check boxes	Select check boxes adjacent to the relevant folders - one or more (or select the top check box to select all items); then, click on a button at the bottom of the page to perform the relevant action on one or more selected folders in the table. Available actions are: Delete, Move, Copy, Archive, Export, Checkout.

Title	Click on the Title header to sort folders alphabetically, by their title.
Created	The date this folder was added to the repository. Click on the 'Created' header to sort items by 'created' date.
Modified	The date the item was last modified. Click on the Modified header to sort items by the last modified date.
Creator	The username of the person who added the item to the repository. Click on the Creator header to sort items by 'creator'.
Workflow state	The current workflow state of the folder or document in the table. Click on the Workflow State header to sort content by 'Workflow State'.

7.2.1.2 Viewing Folder Transaction History

This procedure displays a folder transaction history for the folder at your current location in the web interface of the repository.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, click *Browse Documents* to enter the folder structure.

2. Navigate to the folder for which you want to generate the transaction history.

3. In the About this folder menu, click *Folder transactions*.

4. View the folder transaction history on the page. Details include: username, action taken, date, comment.

7.2.1.3 Adding Documents

This procedure adds a new document to the currently selected folder in KnowledgeTree's web interface.

Perform the following steps:

1. Login to KnowledgeTree's web interface.

2. Locate the folder where you want to upload the document - search, or navigate the repository through Browse Documents to locate the folder.

3. In the Actions on this folder menu click *Add Document*.

4. Specify the path to the document location in the File field; or, click *Browse* to locate the document on your local environment.

5. Specify the document title in the Title field; then, select a document type from the Document Type pick list.

6. Complete the metadata fieldsets and fields for the selected document type - e.g. e - e.g. author, category, keywords etc.
Note: The KnowledgeTree system administrator defines the fieldsets and fields for document types.

7. Click *Add* to upload the document.
Note: Having uploaded the document, the system opens the new document's Document Detail page.

7.2.1.4 Adding Folders

This procedure adds a new folder to KnowledgeTree.

Pre-requisite:

- Only users with the 'Add Folder' permission on a parent folder may add folders to the that parent folder in the repository.

Perform the following steps:

1. Login to KnowledgeTree's web interface.

2. Locate the relevant folder where you wish to add a new folder - search, or enter Browse Documents to browse the folder structure to the relevant folder.

3. In the Actions on this folder menu click *Add a Folder*.

4. Define a name for the new folder in the Folder name field; then, click *Add Folder*.

7.2.1.5 Allocating Roles

The KnowledgeTree administrator allocates permission to a Role (role-based permissions). The Role is then allocated (assigned) to one or more Groups.

The permissions granted to the Role are allocated on folders. By default, the role permissions on a folder are passed on to the child folders. This parent folder role allocation may be overridden or reinstated in the child folder at any time.

Only users with administrator rights are allowed to allocate and edit roles. See the KnowledgeTree Administrator Manual for more information on assigning and editing roles.

7.2.1.6 Bulk Downloading Folder Content

This feature allows you to download the entire contents of a folder stored in the repository to a zipped file, which you can save to your computer for local viewing.

Note: The Bulk Download functionality is only available in the Actions on this folder menu if you have permissions for this action on the folder.

Perform the following steps:

1. Login to KnowledgeTree's web interface; then, click *Browse Documents* to enter the folder structure.

2. Search or browse to locate the folder where you want to download bulk content.

3. Click *Bulk Download* in the Folder Actions menu.

4. A system dialog displays where you can choose to open the zipped file, or to save it to your computer. Once you have made your selection, click OK.

7.2.1.7 Bulk Uploading

This procedure uploads multiple documents in a zipped folder, from your local computer to the KnowledgeTree repository.

Pre-requisites:

- Files should be placed in a zipped archive at the source location prior to attempting bulk upload in KnowledgeTree. Bulk uploaded files retain the directory structure defined in the zip archive.
- Ensure that you use a supported compression format for bulk uploads to KnowledgeTree: Tgz, Tar, Zip, Deb, Ar

Notes:

- *At the time of writing (March 2008), KnowledgeTree does not support gzip compression format for Bulk uploads.*
- *Bulk Upload may not be available for your installation. Consult your administrator if you require access to this functionality.*

Performing a Bulk Upload of content:

1. Login to KnowledgeTree's web interface; then, click *Browse Documents* to enter the folder structure.

2. Locate the destination folder where you want to upload bulk content.

3. In the Actions on this folder menu, click *Bulk Upload*.

4. Specify the path to the ZIP file in the Archive file field; or, click the adjacent *Browse* button to navigate to the ZIP file.

5. Select a predefined document type from the Document Type pick list.

6. Complete the information fields for this document type.

Note: The KnowledgeTree administrator defines the fieldsets that display once you have selected the document type.

7. When you're done, click Upload.

7.2.1.8 Bulk Importing Files from a Server

This procedure adds all documents and folders that are located at a specified location on your local server.

Note: Only administrative users have access to this functionality in the DMS. Please consult the KnowledgeTree Administrator Manual for more information on this action.

7.2.1.9 Viewing Folder Permissions

This procedure displays permissions set up on the currently selected folder.

Note: This functionality is only available in the Actions on this folder menu if you have permissions for this action on the folder. For more information about viewing and editing folder permissions, see the KnowledgeTree Administrator Manual.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, locate the relevant folder - search, or navigate the folder structure in Browse Documents.

2. Open the folder; then, in the Actions on this folder menu, click *Permissions*.

3. View existing permissions on the folder.

7.2.1.10 Renaming Folders

This procedure changes the name of the currently selected folder.

Note: This functionality only displays in the Actions on this folder menu if you have the required permissions to rename the currently selected folder. 'Rename' is only available on sub folders (child folders), and not at the Root folder.

Perform the following steps:

1. Login to KnowledgeTree's web interface; then, navigate to or search for the folder you want to rename.

2. Once you're in the folder; click *Rename* in the Actions on this folder menu.

3. On the Rename Folder page, in the New folder name field, define a new name for the folder; then, click *Rename*.
   Result: A system message displays to advise you that the folder name has changed - you

will also see the old folder name and the new folder name in this message.

7.2.1.11 Viewing Folder Usage Information

This procedure displays reports on how the folder and its sub folders have been used. Usage information may be filtered by:

- user
- general activity - date range, transaction type
- folder content - by workflow and document type

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, search or browse to the relevant folder.

2. In the Actions on this folder menu, click *Usage Information* to open the Usage Information for [folder name] page.

3. Do you want to ...
   - view a report on activity by a specific user? Click *Per-User Activity* to open the Select User page. Enter the user name, or part of the user name; then, click *search for users*. In the displayed result list, click *View Transactions* to open the Specify Search Details page. Enter a date range, select a transaction type, and select a maximum number of items to view; then, click *show transactions*.

   - view a report on the general activity on this folder, which includes all system users? Click *General Activity* to open the Specify Search Details page; then, enter a date range, select a transaction type, and select a maximum number of items to view.

   - view a summary of activity on the folder, which provides details of documents in the folder, filtered by document type, and by workflow states? Click *Documents by Workflow and Document Type*; then, view the displayed report.

7.2.2 Working with Documents

The Document Info menu and the Document Actions menu in Browse Documents provides access to document level actions.

7.2.2.1 Opening the Document Details Page

This procedure displays a summary of information defined for a currently selected document in Browse Documents.

The Document Details page is the system default view that opens when you click on a document link in the folder view. The page provides the summary of metadata defined for the document, such as:

- filename
- file type
- document version
- created by
- owned by
- date the document was last updated
- document type
- workflow status
- document id
- tags defined on the document
- category
- document author
- media type (e.g. 'Text')

Note: Additional metadata fields may be added by the KnowledgeTree administrator.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, locate the document - search, or navigate the folder structure in Browse Documents to the relevant document.

2. Having located the document, click on the document in the folder view to open the document's Document Details page.

3. Now you can ...
   - view metadata information displayed on the page.

   - view any available links created from or to this document, and open linked documents. Existing links display on the right of the page.

   - access the available actions on the document in the Document info menu, which displays on the top left of the page - the following actions may be available: Download, Transaction History, View Roles.

   - access the available actions on the document from the Document actions menu, which displays on the bottom left of the page - the following actions may be available: Discussion, Email, Generate PDF, Links, RSS, Request Assistance.

7.2.2.2 Downloading Documents

This procedure downloads a copy of a document from the repository to your local computer.

Downloading a document allows you to view the document, and to save a copy of the document locally without checking the document out of the repository. Any changes you make to the locally saved document are not saved to the version in the repository. To update a document stored in the repository, you need to check out the document, make your changes, and then check the document back in to the repository.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. In the Document info menu (located on the top left of the page), click *Download*.

7.2.2.3 Viewing Document Permissions

This procedure displays the current permissions set up on a currently selected document.

Note: Only users with the 'Manage Security' permission on a document are allowed to view document permissions. Permissions at the document level are inherited from the folder where the document resides, or from a workflow (if the document is part of a workflow). Permissions are changed at the folder level, and not for individual documents.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. Click *Permissions* in the Document Info menu to open the Document permissions page.

3. On the Document Permissions page you can ...
   - view current permissions on the document, by role and by group, Or;
   - click View resolved permissions for user in order to view the permissions that individual system users have on this document.

7.2.2.4 Viewing Document Transaction History

This procedure displays a transaction history for a currently selected document, and includes a record of all transactions performed on the document.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. In the Document info menu, click *Transaction History* to open the document's Transaction History page.

3. The document Transaction History provides the following details for each

transaction that has occurred on this document: username, action, date, content version, comment.

7.2.2.5 Viewing / Comparing Versions

This procedure displays a record of past content versions and past metadata versions of a currently selected document, and allows you to compare versions.

Note: A new version is created whenever the document in the repository is checked in; metadata versions are incremented when the document metadata is changed.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.
2. In the Document info menu, click *Version History*.
3. On the Document Version History page you can ...
   - view content version and metadata version details (user, date created, version numbers).
   - open a content version to view it - click on the version number in the Content Version column to download the document.
   - compare versions - click on the version in either of the Compare with ... columns to display comparative data.

7.2.2.6 Viewing Roles

This procedure displays current role allocations on the selected document.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.
2. In the Document info menu, click *View Roles*.
3. The View Roles page displays a list of roles that exist in the system, and which have permissions on the currently selected document.

7.2.2.7 Archiving Documents

This procedure archives a currently selected document.

Archiving renders a document invisible to non-administrative users. Only administrative users are allowed to restore archived documents. Archiving clears space in the repository in order to speed up search and document viewing.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. In the Document actions menu, click *Archive* to open the Archive page.

3. Enter a reason for archiving the document in the Reason field; then, click Archive Document.

Note: The system re-opens the folder view, and sends an email to the document creator that the document has been archived.

7.2.2.8 Changing Document Ownership

This procedure changes the document ownership. The new user becomes the document 'owner'.

Note: Changing the document owner may restrict access to the document if the new owner does not have the correct permissions on the document.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. In the Document actions menu, click *Change Document Ownership* to open the Change Ownership page.

3. Select the new user; then, click *Submit*.

7.2.2.9 Checking out a Document

This procedure checks a document out for editing on your local computer.

The system locks the version in the repository while it's checked out. Other users may download the document to view it, but they cannot change it while it is in checked out status.

An administrator can override the checked out status of a document by cancelling the check out. In this case, the user who performed the check out will need to check the document out again to redo the changes and then check the document back in to update the version in the DMS. The Dashboard displays a list of documents that you have checked out when you log on. This reminds you to check in documents where you may have forgotten to do so.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. In the Document actions menu, click *Checkout*.

3. Enter a comment in the Reason field to describe you're checking out the document.

4. Define whether you want to download the document as part of the checkout; then, click *Checkout document*.

7.2.2.10 Canceling Checked Out Documents

The Cancel Checkout option in the Document Actions menu allows you to restore the document to the repository without saving any changes made to the document while it was checked out.

7.2.2.11 Checking in a Document

This procedure checks in a document that was previously checked out of the repository.

Any document that is checked out of the repository is unavailable for other users to edit, move, delete, or archive. Checking in a document increments the document version number - by 1.0 if this is a major update; or, by 0.1 if this is not a major update.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. In the Document actions menu, click *Check in*.

3. Specify the path to the document location in the File field; or, click *Browse* to locate the document.

4. Is this a ...
   - major update? Select the Major Update check box.
   - minor update? Leave the Major Update check box deselected.

5. Type a brief comment in the Reason field to explain the changes made to this document.

6. Do you want to ensure that the document is checked back in to the repository using only the original file name?
   - Yes. Select the Force Original Filename check box.
   - No. Leave the Force Original Filename check box deselected.

7. Click *Checkin* to upload the document.

7.2.2.12 Copying Documents

This procedure copies a currently selected document to another location in the repository.

The Copy Document [document name] page allows you to browse the folder structure to select a target destination.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's [Document Details](#) page.

2. In the Document actions menu, click *Copy*.

3. Navigate the folder structure to select the destination folder where you want to copy the document.

4. Enter a reason for the copy action; then, click *Copy*.
   Result: The document is copied to the new folder location, and the Document Details page for the document opens at the new folder location.

7.2.2.13 Deleting Documents

This procedure moves a currently selected document to the repository's deleted documents storage location.

Note: Deleted documents and folders remain in the repository and may only be expunged (permanently removed) or restored by your KnowledgeTree administrator. Documents are restored and expunged in the Document Storage section of DMS Administration.

Pre-requisites:

- You must have the appropriate permissions on the document or folder to delete it.

Note on deleting Immutable documents:
Non-administrative users are not able to delete immutable documents. Only administrative users may delete Immutable documents, and then only through the Delete action from the immutable document's Document Detail page.

Perform the following steps:

1. Login to KnowledgeTree's web interface; then, search for the relevant document, or navigate the folder structure in Browse Documents to locate the relevant document.

2. The following options may be used to delete a document:

- If you are viewing the document's Document Detail page; then, use the *Delete* link in the Document actions menu to delete the document.

- If you are viewing the document along with other documents and folders in the list of contents in the folder view; then, select the check box adjacent to the document (select the check box for each document and folder you want to delete); then, click the *Delete* button at the bottom of the page.

3. Specify the reason for the deletion; then, click Delete.
   Note: The document/s and/or the folder/s you selected are removed from the folder, and this action is recorded in the Transaction History reports.

7.2.2.14 Viewing / Managing Discussion Threads

This procedure displays and closes an existing thread, adds a post to an existing thread, and creates a new discussion thread on an existing document.

Discussions are a low level collaboration tool that provides a forum for users to share their ideas on a document. You can view and add to existing discussion threads for a currently selected document, or create a new discussion thread.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's [Document Details]() page.

2. In the Document actions menu, click *Discussion*.

3. Do you want to:
   - view all threads on this document, including closed threads? Scroll to the bottom of the page; then, click *View threads*. A list of past and existing threads displays at the top of the page, with the following information on each thread: subject, creator, number of views, number of replies, date of last activity, current state, and concluding comment.

   - create a new thread? Enter a topic in the Subject field; then, add your comment in the Body field. Click *Create thread*. By default, the first state on a thread is 'Under discussion'.

   - open an existing thread to add to a discussion? Click on the thread subject in the Existing threads section to open the thread. Add a subject for your post; then, add a comment. If the matter requires further discussion, leave the state unchanged. By default, the state of a thread is 'Under discussion' until a user moves the thread to the 'concluded' state, and thereafter to 'closed'. By default, threads move through the following states in succession: Under discussion, Conclusion, Closed. Click *Post reply*.

   - close a thread? Click on the thread subject in the Existing threads section to open the thread. Enter a subject line for your final comment; then, add a comment. Click *Post reply*; then, select Closed from the State pick list. In the Reason field, specify a reason for closing the thread; then, click *Change state*.

7.2.2.15 Editing Document Metadata

This procedure edits a currently selected document's document type and associated metadata, and edits the document's generic metadata.

Note: Some metadata is associated with specific document types, but KnowledgeTree also allows the existence of generic metadata, which is information that you may want to specify for all document types - e.g. document title, create date, author, etc. depending on your organization.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. In the Document actions menu, click *Edit Metadata* to open the Edit Metadata page.
   Note: This page displays metadata fields that are associated with the document's current document type, and metadata that applies to all document types in the system.

3. Do you want to ...
   - change the document type? Click the document type link to open the Change Document Type page. Select a document type from the New Document Type pick list; then, click Update Document. You will need to update the metadata associated with the new document type. Update the document metadata, now including metadata specific to this document type.

   - edit existing metadata? View existing metadata values on the page, and make the changes in the various fields as required.

4. When you're done, click Update Document.

7.2.2.16 Sending Emails

This procedure sends an email message to one or more KnowledgeTree users or groups, and provides a link to the currently selected document.

Notes:

- *You may send emails from within the KnowledgeTree system (web interface) to one or more groups or users, provided those users have email notifications switched on for their user profile. The list of allowable recipients that display on the Email page are users who have email notifications switched on.*
- *On receipt of an email from the repository, a recipient may click on the link in the email, which opens the Document Detail page for the relevant document in the repository - the user will need to log in to the system, and will require at least the 'read' permission on the document.*

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document

Details page.

2. In the Document actions menu, click *Email* to open the Email document page.

3. Select recipients:
   - To select groups - one or more - populate the Assigned Groups column.
   - To select users - one or more - populate the Assigned Users column.

4. In the Comment field, enter a message for the email recipients; then, click Email .

7.2.2.17 Generating PDFs

This procedure converts a currently selected document to PDF format.

Pre-requisites:
- To view the file you need to have a PDF Reader installed.

KnowledgeTree supports PDF conversion for the following file formats:
doc, ods, odt, ott, txt, rtf, sxw, stw, xml, pdb, psw, ods, ots, sxc, stc, dif, dbf, xls, xlt, slk, csv, pxl, odp, otp, sxi, sti, ppt, pot, sxd, odg, otg, std, asc

Note: When viewing a document that has a file format other than one of the options listed about the Generate PDF option will not display as an available document action.

Perform the following steps:
1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. In the Document actions menu, click *Generate PDF* to open the Generate PDF of: [document name] page.

3. Click *Convert Document*.
   Result: By default, the converted PDF is downloaded to your desktop. You may browse to select another location.

7.2.2.18 Viewing / Adding Document Links

This procedure removes and displays existing links, creates new links (internal or external), and opens linked documents on a currently selected document.

Document links establish associations between documents in the repository, and to link to pages or sites on the Internet.

Note: When creating document link types, the administrator specifies the type of relationship that the link implies between the linked documents – i.e. 'associated with', or 'duplicated by'. KnowledgeTree ships with the following predefined link types: Attachment, Reference, Copy.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. In the Document actions menu, click *Links* to open the Document Links page.

3. Do you want to..

   - view existing links? View the list of links (if any) on the page.

   - view a linked document? Click on the document name in the Target column.

   - delete an existing link? Click the delete icon adjacent to an existing link.

   - add a link to one or more documents in the repository? Click Add a new link to open the Add Link page. Select the target documents; then, click Link. Select a link type from the pick list; then, click Link.

   - add an external link? Click *Add an external link* to open the Add External Link page. Define a name for the link and add the URL; then, click Link.

7.2.2.19 Moving Documents

This procedure moves a document to another location in the repository.

Note: Only users with the read and write permissions on a folder are allowed to move an item to another location in the repository.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. In the Document actions menu, click *Move* to open the Move Document page.

3. Browse to the destination folder.

4. In the Reason field, specify the reason for moving the document; then, click *Move*.
   Note: The documents and/ or folders you moved display in the Browse Documents table in their new location.

7.2.2.20 Creating RSS Feeds on a Document

This procedure generates a link on a currently selected document. You may copy the document link to an external aggregator to create a RSS Feed on the document in the repository.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. In the Document actions menu, click *RSS*.

3. The system generates the RSS link for the document.

4. Copy the link into your external RSS reader to create a feed to the selected document or folder.
   Note: Ensure that your RSS reader is RSS 2.0 compatible.

See Also: RSS Feeds

7.2.2.21 Renaming Documents

This procedure renames the file name of a document, if you have 'write' permissions on the document.

Note: This action does not change the document title. It only changes the file name. For example, if you have a jpeg image file in the repository, and you want to change it into a bitmap. This involves renaming the file from filename .jpg to filename .bmp; then, checking out the .jpg file and checking in the bitmap version.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. In the Document actions menu, click *Rename* to open the Rename document page.

3. Enter the new file name in the New file name field; then, click *Rename*.

7.2.2.22 Requesting Assistance

This procedure sends a request for assistance on a document to the system administrator and the document owner.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document

Details page.

2. In the Document actions menu, click *Request Assistance* to open the Request Assistance page.

3. Define a subject line and details of your request; then, click *Request Assistance*.

7.2.2.23 Viewing Documents Inline

This procedure displays the content of a document within the document management system so that you can view it inline.

Note: Currently (April 2008) the Inline View plugin supports only the following file types:

- *png*
- *jpeg*
- *gif*
- *tiff*
- *html*
- *xml*
- *plain text documents*

Support for other file types is reserved for future development. To preview other file types, you may convert the document to PDF; then, download the document to view it.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the Document Details page of the relevant document.

2. In the Document actions menu, click *View Inline*.
   Note: The View Inline menu option only displays when you are on the Document Details page of a document of a supported file type. See the note above.

3. The content of the document displays on the page.

7.2.2.24 Viewing / Starting Workflows

This procedure displays assigned workflows (if any), and starts a workflow on a currently selected document.

Note: Once a document is in a workflow, you cannot overwrite that workflow by assigning a different workflow to the document - the document can only transition between states in the workflow that has been assigned to it.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the Document Details page

of the document where you want to view or start a workflow.

2. In the Document actions menu, click *Workflow*.

3. Do you want to ...
   - view a current workflow? View settings for the workflow (if assigned) on the page.

   - perform a transition on the workflow? Select a transition in the Transition to perform pick list; then, add a comment in the Reason for transition field to describe why you are changing the workflow state. Click Perform Transition .
     Note: The Document Workflow page confirms that the transition has been performed, and it displays the new workflow state. Note: Transitions are a manual procedure - e.g. once you have reviewed a document, you need to check it back in, and then manually transition the document to the 'reviewed' state.

   - start a workflow? Select a predefined workflow from the drop down menu; then, click *Start Workflow*.

7.2.2.24.1 About Workflows

A Workflow describes a document life-cycle as a predefined series of states and transitions that a document must pass through before it is considered complete.

Note: The KnowledgeTree administrator defines and manages workflows in DMS Administration. Predefined workflows display in the pick list on the Document Workflow page.

Any KnowledgeTree user may be involved in a document workflow. Some documents, such as tenders, may have complex workflows involving several people, both internal and external to your organization.

How are Workflows Assigned?

A document in the repository may have only one workflow attached to it at any given time. Although workflows are not automatically attached to new documents when they're added to the repository, the administrator may configure the system to assign workflows when new documents are created, or to assign workflows only to specific documents.

You may assign a workflow to a document you're working on, if you have the required permissions, and assuming that a workflow was not assigned by default when the document was added to the repository.
Note: Once a document is in a workflow, you cannot overwrite that workflow by assigning a different workflow to the document - the document can transition between states in the workflow that has been assigned to it.

What are States and Transitions?

Workflows consist of states and transitions.

States

A state may be defined as a stage in a document’s life-cycle, such as billed, or draft. Each document workflow has a starting state, which is the initial state for any document in a workflow.

Transitions

Transitions, which may be defined as the way in which documents move between states, are an essential part of the workflow. Each state can have one or more transitions, depending on how the administrator has created the workflow. Transitions point to the next step in the workflow, such as 'send to client' or 'review', which changes the state of the document. Transitions represent 'actions' that may be performed on a document. For example, an invoice starts in the generated state; then it is sent to client, before it is marked as the next state, e.g. 'billed'.

Some transitions are 'guarded' by the permissions system. For example, you may have a 'Publication' workflow, where only users with the role 'reviewer' are allowed to review a document, and then move that document from 'draft' to 'published'.

What are Workflow Effects (Actions)?

KnowledgeTree users and administrators may use workflows to restrict, deny, or grant access to documents in the repository, based on the document’s position in the workflow. For example, a certain 'state' can be configured to restrict both actions and permissions on a document, where only a user with the role 'reviewer' may be allowed to discuss draft documents for instance, while clients will be disallowed from viewing unbilled invoices, and published documents will be prevented from being checked in or checked out of the repository.

Additionally, users in specified Roles or Groups can be notified when a document reaches a certain state in a workflow. These notifications display on the Dashboard, and are emailed to users who are set up to receive email notifications.

7.2.3 Search

KnowledgeTree's Search functionality allows you to ...

- view the results of your most recent search
- run a quick (simple) search on content and metadata, or on metadata only
- set up advanced searches, comprising one or more sets of criteria that you can configure through a user-friendly advanced search configuration page
- set up your own complex and detailed search expressions, using an onscreen search criteria editor and KnowledgeTree's search grammar
- save your searches for later re-use
- edit, delete, or share your saved searches with other system users.

How do I use Search?

The Search Portlet
Access to search is provided through KnowledgeTree's web interface Search portlet, which is located at the top right of the page in all sections of the document management system interface. The search portlet comprises a text entry field, a search button, and a drop down menu with the following options:

- Advanced Search
- Previous Search Results
- Quick Search Options - includes the following sub menu items: 'content and metadata', and 'metadata'
- Toggle search results format - includes the following sub menu items: 'Search engine format', and 'Browse view format'

7.2.3.1 Using Search

This procedure searches the KnowledgeTree repository, returns results based on predefined search criteria and user-selected search methods, displays your last search results, creates new saved searches, and displays existing saved searches.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, locate the Search portlet at the top right of the page, beneath the navigation bar.
   Note:
   - *Search results exclude words less than 4 characters, e.g. 'the', 'for'*
   - *Displayed results are permission-based - you need at least the 'read' permission on returned items*
   - *The Search function relies on data extracted during indexing*
   - *See also: How can I change the way search results display on the page?*
2. Do you want to ...
   - view the results of a recent search? Click the down arrow adjacent to the search button to open the drop down menu; then, select *Previous Search Results*. The results of the last search you ran displays on the page.
   - run a quick search on content and metadata? Enter simple search criteria in the search field;then, click *search*. The results of your search displays on the page.
     Note: The default quick search is on 'content and metadata'.
   - run a quick search on metadata only? Enter simple search criteria in the search field. Click the down arrow adjacent to the search button to open the drop down menu; then, select *Quick Search Options - metadata*. Click *search*. The results of your search displays on the page.
   - set up an advanced search? Click the down arrow adjacent to the search button to open the drop down menu; then, select *Advanced Search*. On the

Advanced Search page you can define one or more sets of criteria for your search. When you're done, click *Search*. The results of your search displays on the page.

- create a complex search expression? Click the down arrow adjacent to the search button to open the drop down menu; then, select *Advanced Search*. On the Advanced Search page, click *Search Criteria Editor* to open the Search Criteria Editor, where you can set up a search using KnowledgeTree's search grammar. For more information on setting up complex searches, see the KnowledgeTree Wiki,

- save a search? Having run a search - quick, advanced, or complex - on the search results page, define a name for the search in the section headed 'You can save this search'; then, click *Save*.

- run a saved search? Click *Browse Documents* to enter the folder structure. Scroll down to the bottom of the page to the Search menu. Saved searches are listed on the menu. Click on a saved search to run the search. The results of your search displays on the page.

- manage your existing saved searches? Click *Browse Documents* to enter the folder structure. Scroll down to the bottom of the page to the Search menu. Saved searches are listed on the menu. Click *Manage Saved Search* to open the Manage Saved Search Criteria page. On this page you can: create a new advanced or complex search; edit your saved search (using the Search Criteria Editor), delete your saved search, share your saved search with others (if this option is enabled), and run a saved search to view results.

7.2.3.2 Toggling Search Results Format

This procedure defines how your search results display in KnowledgeTree's web interface - either in search engine format, or in browse view format.

Perform the following steps:

1. Log in to KnowledgeTree's web interface.

2. Locate the 'search' portlet at the top right of the page beneath the navigation bar; then, click the down arrow adjacent to the search button to display the search options menu.

3. Select Toggle search results format; then, select either of the following options:
   - Search engine format

   - Browse view format

7.2.4 Browse by ..

This procedure allows you to select a 'browse by ... ' mode for navigating and finding content in the repository. The browse by views allow you to filter content in the repository by folder, by document type, or by lookup value – the default is the folder view.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, click Browse Documents to enter the folder structure.
   Note: By default, the browse view opens in Folder view.

2. How do you want to view content in the repository?

- By folder. The current view, which is the default, is the 'folder' view. Click on a folder to open it, and start browsing repository content by navigating through the folder structure.

- By document type. Scroll to the bottom of the page to the Browse by ... menu. Click the plus icon to expand the menu; then, click Document Type. Select a document type from the list to open a list of the documents in the repository that match this criteria.

- By lookup value. Scroll to the bottom of the page to the Browse by ... menu. Click the plus icon to expand the menu; then, click Lookup Value. Select a lookup field from the list; then, select an associated lookup value. The system returns all documents in the repository that matches the lookup field and associated lookup value defined by you.

7.2.5 Subscriptions

Subscribing to a document or folder allows notifications to be sent to you via email (if you have this feature activated on your system) when the document or folder is checked in/checked out, deleted, moved, archived, etc.

User-specific notifications display on the Dashboard as internal RSS Feeds. Remove a subscription (unsubscribe from the document or folder) to stop receiving notifications.

7.2.5.1 Using Subscriptions

This procedure displays and removes existing subscriptions, and adds new subscriptions to documents and folders.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, click *Browse Documents* to enter the folder structure.

2. Do you want to ...

- view subscriptions currently set up for your user profile? In Browse Documents, scroll down on the page to the Subscriptions menu. Click the expand icon (+) to open the menu; then, click *Manage subscriptions* to open the Subscription Management page. The page displays a list of all the files and folders where you currently have subscriptions set up - the full path to the folder or document is displayed. You may select the check box adjacent to any folder or document subscription you want to remove; then, click *Remove subscription*.

- subscribe to a folder? Search for or browse to the folder in Browse Documents; then, scroll down the page to the Subscriptions menu at the bottom left of the page. Expand the menu; then, click *Subscribe to folder*. A system message confirms the subscription.

- subscribe to a document? Click on the document title in the folder view to open its Document Details page. Scroll down the page to the Subscriptions menu at the bottom left of the page. Expand the menu; then, click *Subscribe to document*. A system message confirms the subscription.

- remove an existing subscription on a folder or a document? Search for or browse to the folder or document in Browse Documents; then, scroll down the page to the Subscriptions menu at the bottom left of the page. Expand the menu; then, click *Unsubscribe to folder* (if this is a folder subscription), or click *Unsubscribe to document* (if this is a document subscription).
  Alternative step: In Browse Documents, scroll down on the page to the Subscriptions menu. Click the expand icon (+) to open the menu; then, click Manage subscriptions to open the Subscription Management page. The page displays a list of all the files and folders where you currently have subscriptions set up - the full path to the folder or document is displayed. Select the check box adjacent to any folder or document subscription you want to remove; then, click Remove subscription.

7.3 Preferences

In the Preferences tabbed page, you can view and edit the following information in your personal profile:

- Name - this is the username used by the system for reports and lists.
- Email Address - the system uses this address to send alerts and notifications
- Email Notifications - select this check box if you wish to receive alerts and notifications by email, to the email address specified in the Email Address field. If this option is not selected you will only see your notifications on the Dashboard.
- Change your password - click on the link to change your current password

7.3.1 Viewing/Editing User Profile

This procedure displays and edits your user profile.

Perform the following steps:

1. Log in to KnowledgeTree's Web interface; then, click the Preferences tab.

2. Do you want to ...

- change your username? Define a new username in the Name field.

- change your email address? Define a new email address in the Email Address field.

- switch Email Notifications on or off? Select or deselect the Email Notifications check box to define whether or not you will receive notifications and alerts via the email address specified in the previous field.

- change your password? Go to Changing your password.

3. When you're done, click *Update Preferences* to save your changes.

7.3.2 Changing Passwords

This procedure changes the password you use to log in to KnowledgeTree.

Perform the following steps:

1. Log in to KnowledgeTree's Web interface; then, click the Preferences.

2. Click *Change your password* to open the Password page.

3. Enter your new password in the Password field; then, retype the new password in the Confirm Password field.

4. Click *Set Password*.

7.4 About

The About tab displays the following information:

- Copyright notice

- Contact information for KnowledgeTree sales

- Links to KnowledgeTree community resources

- A list of the contributors who have contributed code and/or who have helped with testing for the current version

- Logos and links for third party software used in KnowledgeTree

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