User Manual

Version 3.5.4

KnowledgeTree™
Document Management Made Simple

Table of Contents

Welcome to KnowledgeTree

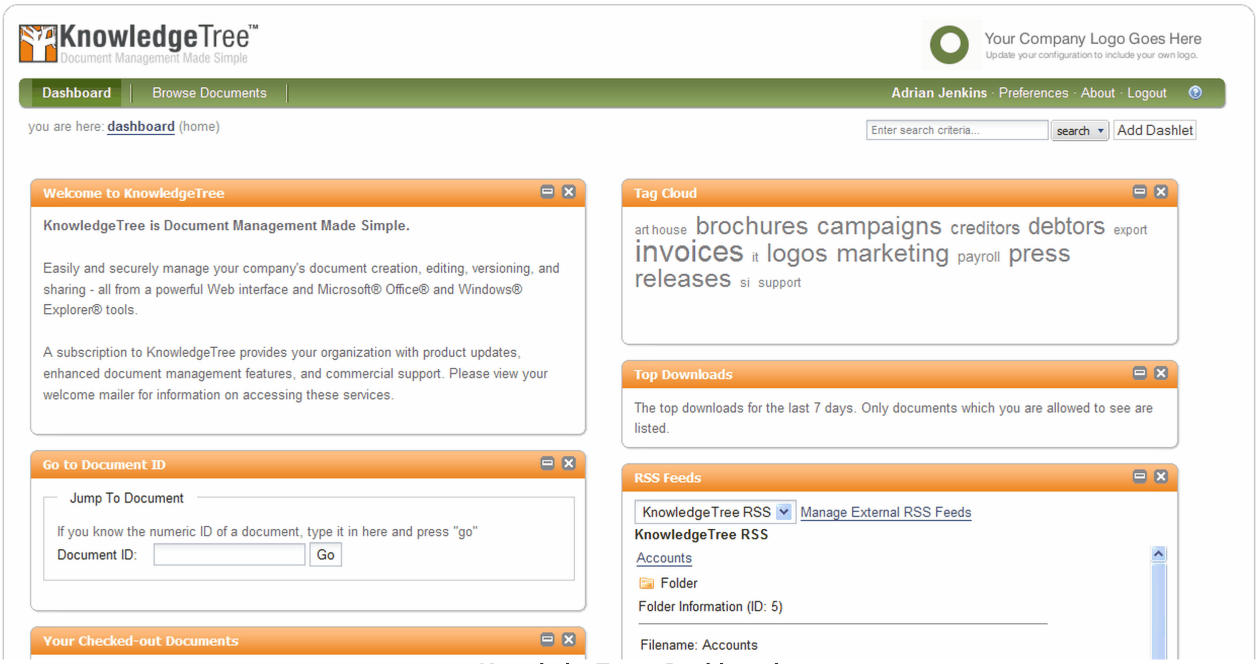
Part 1

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.



KnowledgeTree Dashboard

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.

See Also:
KnowledgeTree Overview

1.1 About this Help

The KnowledgeTree User Manual describes the features and functionality available in KnowledgeTree Document Management System, and provides instructions intended for use by end users of the system.

This Help assumes that your system is installed and configured for use in your organization.

Note: For installation, upgrade, and administrator information, please see the KnowledgeTree Installation and Upgrade Guide, and the KnowledgeTree Administrator Manual.

Getting the latest version of the KnowledgeTree Documentation

The latest published version of this document may be found at http://www.knowledgetree.com/resources - please also see the KnowledgeTree Wiki for updates, various articles, and the latest Release Notes.

This version:
KnowledgeTree version: 3.5.4
Publication Date: 3 November 2008

Improving KnowledgeTree Documentation
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.

1.2 Getting Help

⊟ Getting Help for KnowledgeTree Commercial Edition

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

Find out more about KnowledgeTree's Commercial Support services at the KnowledgeTree website, or contact us for help with choosing the best support package for your needs.

KnowledgeTree Customers

Your KnowledgeTree license is sent to you in an email that includes instructions for logging support requests. Find out more about logging support requests.

See also Getting Support on the KnowledgeTree Wiki.

⊟ Getting Help for KnowledgeTree Community Edition

Community support is available at the KnowledgeTree Community Forums, where you can post questions and get answers from KnowledgeTree developers and the KnowledgeTree community.

⊟ KnowledgeTree Documentation

The following documentation is available at http://www.knowledgetree.com/resources: (view online or download PDF files)

- KnowledgeTree Administrator Manual
- KnowledgeTree Installation and Upgrade Guide
- KnowledgeTree User Manual
- KnowledgeTreeLive User Guide
- KnowledgeTree Client Tools User Guide (Hot Folders, Drop Box, Office 2007 Integration)
- 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:

- 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?
- Find more resources on the KnowledgeTree Community Wiki and at http://www.knowledgetree.com/community.

1.3 KnowledgeTree Editions

KnowledgeTree is available in three Editions:

⊟ KnowledgeTree Commercial Edition (On-premise)

- Stack installed on your own operating system
- Commercially supported
- Production-ready document management software application
- Includes the KnowledgeTree Client Tools for Windows package and other commercial-only functionality

View Support Options for KnowledgeTree Commercial customers.

⊟ KnowledgeTreeLive

- Hosted, Document Management on Demand

- A pay per month and per user subscription service
- Requires no installation or maintenance

KnowledgeTreeLive is a Web-based, hosted edition of the KnowledgeTree Document Management Software that runs on Amazon's Elastic Compute Cloud™. Documents are stored on Amazon.com's Simple Storage Service™ - a massive, fault-tolerant, storage area network. This type of offering is typically referred to as 'Software-as-a-Service'.

The KnowledgeTreeLive service runs on rPath™ Linux Software Appliances, providing KnowledgeTree with a fast and effective management platform for large Linux virtual server clusters.

⊟ How do I get a KnowledgeTreeLive Account?

Contact KnowledgeTree Sales to sign up for KnowledgeTreeLive account. When signing up, you will receive an Administrator account and a secure Web address.

Your KnowledgeTreeLive Web address uses a secure HTTPS connection. The account name you specify when setting up your account becomes part of the Web address you use to access the KnowledgeTreeLive system. This Web address is the online location of your document management system.

⊟ KnowledgeTree Community Edition

- Open Source
- Community supported
- Free to download, use, modify, and redistribute, subject to the terms of the GNU GPL v3.
- Lacks some commercial features
- Also available as a software appliance
- Installed as a click-through Stack Installed package, or as a Source Only package.

KnowledgeTree Community Edition is the free version of the Web-based KnowledgeTree Document Management System. Find out more about KnowledgeTree Community Edition.

KnowledgeTree Appliance

KnowledgeTree Community Edition is also available as a Software Appliance. KnowledgeTree Appliance is easily maintained once installed to a dedicated physical or virtual server - updates are packaged and sent to the server via the Internet, further reducing the total cost of ownership.

⊟ Tell me more about KnowledgeTree Appliance?

The KnowledgeTree Appliance is available in a variety of build types, including virtual machine images, bootable install CDs/DVDs, VMWare, and hard-drive images.

The following KnowledgeTree Appliance documentation is available on the KnowledgeTree Wiki:

- Installing KnowledgeTree Appliance - how to download and install KnowledgeTree Open Source Appliance
- Configuring KnowledgeTree Appliance - how to use the Appliance Configuration Wizard to define the initial configuration, to edit the configuration, and for configuring updates
- Configuring KnowledgeTree through the Appliance Management Interface - how to

configure KnowledgeTree-specific settings by editing KnowledgeTree's config.ini file through the Appliance Management Interface

See Also:
More information about KnowledgeTree is available at the KnowledgeTree website:
- KnowledgeTree Product Overview and Deployment Options
- KnowledgeTree Features Summary
- KnowledgeTree Editions Comparison Matrix

Call us on +1 415 692 1418, or email sales@knowledgetree.com.

1.3.1 KnowledgeTree Commercial Features

KnowledgeTree Commercial Editions include Professional Support, and provide access to additional document management tools and functionality:

Note: Features not referenced in this Manual are available only to the KnowledgeTree system administrator, and are documented in the KnowledgeTree Administrator Manual.

⊟ KnowledgeTree Commercial Tools and Add-ins

- KnowledgeTree Client Tools for Windows
  Note: This toolset contains all of the following: KnowledgeTree Explorer, KnowledgeTree Outlook Integration, KnowledgeTree Office Add-in for Microsoft Office, KnowledgeTree Desktop Imaging.

- KnowledgeTree Hot Folders
  Note: For more information on KnowledgeTree Hot Folders, see the KnowledgeTree Client Tools User Guide.

⊟ KnowledgeTree Web Interface Commercial Functionality:

Users

Document Actions
- Document Shortcuts
- Document Alerts
- Inline View of Documents
- Document Comparison

Dashlets
- Recently Viewed Items
- Top Downloads
- Go to Document ID
- Your Checked-out Documents
- Quicklinks

Administrators

Reporting
- User Reports: Last Login Information, Login Activity (all users), Full Login History (per

user)
- Folder Usage Information
- Extended Transaction Information (view transactions per user, or global transaction reports)

Other
- Professional Support
- Custom Document Numbering
- Email Document Types (used with KnowledgeTree Outlook Integration)
- Conditional metadata

1.3.2 KnowledgeTree Client Tools

The KnowledgeTree Client Tools for Windows are client-side tools that allow alternate methods of interacting with the KnowledgeTree server.

There are two sets of KnowledgeTree Client Tools:

Note: See the description for all the tools below.

- KnowledgeTree Client Tools for Windows - a single package download, including KnowledgeTree Explorer, KnowledgeTree Office Integration, KnowledgeTree Outlook Integration, and KnowledgeTree Desktop Imaging.

- KnowledgeTree Client Tools - each of the following are stand-alone downloads: KnowledgeTree Hot Folders, KnowledgeTree Drop Box, and KnowledgeTree Office Add-in.

KnowledgeTree Client Tools for Windows

KnowledgeTree Client Tools for Windows is a set of client-side tools for use with KnowledgeTree Commercial Editions. These tools are downloaded and installed on the client machine, in a single package containing the following components:

Commercial Editions Only

- KnowledgeTree Integration Server - a server-side component of KnowledgeTree Commercial Editions that provides a standards-based WebDAV interface into the KnowledgeTree Document Management System. Allows KnowledgeTree Commercial users to gain access to the Web-based KnowledgeTree repository, directly from their Windows desktop. KnowledgeTree Integration Server provides access to several plugins that extend the utility of the server for specific tasks.

- KnowledgeTree Explorer for Windows - a familiar Windows® Explorer-type application that provides a file browser view of the document repository and allows users to work with content in the repository as though they're working on their local computer. Files within the repository may be opened from the desktop, while retaining the functionality of workflows, version control, and metadata. Files, even entire folder trees, may be dragged and dropped from the desktop into KnowledgeTree Explorer.

- KnowledgeTree Office Add-in for Microsoft Office - adds KnowledgeTree toolbar buttons and a KnowledgeTree menu to the toolbar in Microsoft Office XP/2003 applications (PowerPoint, Excel, Word), to provide quick access to the KnowledgeTree repository from within Microsoft Office applications - add new documents, check-in, check out, and update document metadata.

- KnowledgeTree Outlook Integration - adds KnowledgeTree buttons and a KnowledgeTree menu to the Microsoft Outlook toolbar to allow you to save incoming and outgoing emails and attachments directly to the KnowledgeTree repository, and to attach files from the repository to outgoing emails.

  Note: For more information about using KnowledgeTree Outlook Integration, please see the KnowledgeTree User Manual.

- KnowledgeTree Desktop Imaging - a tool accessible from within KnowledgeTree Explorer that allows you to scan hard copy documents directly into the KnowledgeTree repository from within KnowledgeTree Explorer.

  Note: For more information about using KnowledgeTree Desktop Imaging, see the KnowledgeTree User Manual.

Features

- Open files in the KnowledgeTree repository from your desktop, through KnowledgeTree Explorer, while maintaining control of document versions and metadata.
- Copy files, or entire folder trees, to or from the repository, using your operating system's 'drag and drop' action.
- Control all aspects of a document, including workflow, from the Windows desktop.
- Browse, check out, or check-in KnowledgeTree managed documents from within Microsoft Office XP/2003 applications, using an easy to use Office Toolbar plugin.

Find out more about KnowledgeTree Features.

Note: Information on installing and using the KnowledgeTree Client Tools package is documented in the KnowledgeTree User Manual, the KnowledgeTree Installation Guide, and the KnowledgeTree Administrator Manual.

KnowledgeTree Hot Folders, KnowledgeTree Drop Box, and KnowledgeTree Office Add-in

These KnowledgeTree client tools are available as stand-alone downloads for KnowledgeTreeLive and KnowledgeTree Commercial On-premise Editions (Windows users):

Note: At the time of writing (October 2008), KnowledgeTree Drop Box is offered as a free download (registration is required) for KnowledgeTree Community Edition (from version 3.5.3).

- KnowledgeTree Hot Folders: integrates your scanner or bulk document handling applications with KnowledgeTree.

Commercial Editions Only

- KnowledgeTree Drop Box: allows drag-and-drop from the Windows desktop right into KnowledgeTree

- KnowledgeTree Office Add-in: provides access to KnowledgeTree from within Microsoft Office 2007 applications

Note: Information on installing and using these KnowledgeTree Client Tools is available in the KnowledgeTree Client Tools User Guide.

To try out these Tools, go to the KnowledgeTree Client Tools download page on the KnowledgeTree website.

1.4 KnowledgeTree Overview

This chapter provides an introduction to KnowledgeTree's document management concepts:

- The user structure - users, groups, roles, and units
- Content Organization
- Permissions
- Version Control
- Workflows

1.4.1 KnowledgeTree Users and Content Organization

KnowledgeTree organizes system users into users, groups, roles, and units.
Note: Only the KnowledgeTree administrator may add, edit, or delete these entities.

Note: Permissions are granted only to groups, or to roles, and not to individual users. Any user requiring access to any content in KnowledgeTree must have been assigned to a group or a role, and the group or role must have the appropriate folder permissions.

- 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.

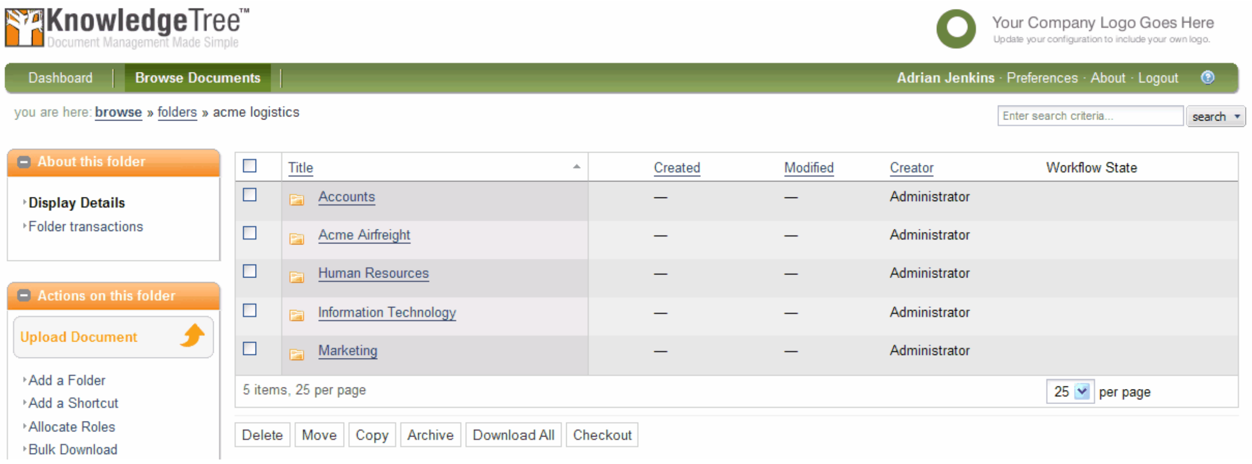
- Groups - each group contains one or more users. As a user, you may belong to more than one group, and your group may also be allocated to a Role on a per-directory basis.

- 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, where only a specific user may be required to perform a workflow-related task on the document. The KnowledgeTree administrator creates the role and assigns permissions to the role. Roles may be assigned to one or more users, or to groups. To give a role permissions on a folder, you allocate the role on the folder (if you have appropriate permissions on the folder). Only users with administrator rights may allocate and edit roles. See the KnowledgeTree Administrator Manual for more information on assigning and editing roles.

Organizing content in KnowledgeTree

Files and folders are typically added to KnowledgeTree in a familiar folder/file hierarchy. Document metadata - tags, document types, document IDs, versioning, file types, and user-entered information (relevant to the document type), is used as a storage and retrieval mechanism.

Content in the document management system is secured through Permissions - you will not be able to view or work with any content where you do not have appropriate permissions on that content (permissions are set up by your system administrator).



1.4.2 Permissions

KnowledgeTree controls access to content in the system through the permissions structure.

Permissions are set up at the following levels:

- Group - permissions are assigned to groups. When users are added to the group, they acquire the permissions of the group.

- Role - permissions are assigned to roles. When a role is assigned to a user, the user acquires the permissions of the role.

- Folder - when setting up permissions on a folder, the admin user defines the roles and groups that have permissions on the folder.

⊟ Tell me more about folder permissions

To view a folder in KnowledgeTree, you must belong to a Role or to a Group that has at least the 'read' permission on the folder.

By default, permissions on a parent folder also apply to its sub-folders (child folders) - the child folders 'inherit' the permissions of the parent (higher level) folder. You can disable Inherited Permissions on the folder if you want to set up different permissions on a sub-folder, and you can re-instate Inherited Permissions at any time. You must have the 'Manage Permissions' permissions on a folder to enable/disable Permissions Inheritance.

The 'inherit permissions' feature may be disabled if you want to set up a custom permission set on a lower level folder. Any user with the 'Manage Permissions' permission on a folder may enable or disable 'inherit permissions.

⊟ How can I view the current permissions set up on a specific folder?

To view permissions on a specific folder, navigate to the folder in Browse Documents;

then, click the *Permissions* link in the Actions on this folder menu to view the permissions set up on the folder.
See also:

- Viewing Folder Permissions
- Viewing Document Permissions

What are KnowledgeTree's default permissions?

KnowledgeTree provides the following default permissions:

Permission	Description
Read	allows you to view a document and its metadata. The Search and Browse function only returns content where you have at least the 'read' permission.
Write	allows you 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 you have the 'write' permission.
Add Folder	allows you to create and edit folders where you have this permission on the parent folder.
Manage Security	allows you to set up and edit security options on the folder and on its' content, including editing permission and allocating roles that have permissions on the folder.
Delete	allows you to delete files and folders, where you have this permission on the parent folder.
Manage Workflow	allows you to change workflow settings on a document (e.g. perform a transition)
Folder Details	allows you to view details related to the folder name, and to view a transaction history.
Rename Folder	allows you to rename a currently selected folder.

View Permissions for:
Root Folder

This page shows the permissions that apply to this specific folder. Only the roles or groups which have permissions assigned are shown.

Manage security: Edit permissions | View resolved permissions for user

This folder defines its own permissions.

Role or Group	Read	Write	Add Folder	Manage security	Delete	Manage workflow	Folder Details	Rename Folder
Role: Authenticated Users	✓	⊖	⊖	⊖	⊖	⊖	⊖	⊖
Role: Everyone	✓	⊖	⊖	⊖	⊖	⊖	⊖	⊖
Role: Owner	✓	⊖	⊖	⊖	⊖	⊖	⊖	⊖
Role: Publisher	✓	⊖	⊖	⊖	⊖	⊖	⊖	⊖
Role: Reviewer	✓	⊖	⊖	⊖	⊖	⊖	⊖	⊖
Role: Creator	✓	⊖	⊖	⊖	⊖	⊖	⊖	⊖
Role: WorkSpaceOwner	✓	⊖	⊖	⊖	⊖	⊖	⊖	⊖
Group: System Administrators	✓	✓	✓	✓	✓	✓	✓	✓
Group: Accounts	✓	⊖	⊖	⊖	⊖	⊖	✓	⊖
Group: Exports	✓	⊖	⊖	⊖	⊖	⊖	⊖	⊖
Group: Imports	✓	⊖	⊖	⊖	⊖	⊖	⊖	⊖
Group: Management	✓	✓	✓	✓	✓	✓	✓	✓
Group: Office Admins	✓	⊖	⊖	⊖	⊖	⊖	⊖	⊖

View folder permissions

1.4.3 Version Control

KnowledgeTree provides 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.

  See Also:
  - Checking-out documents (KnowledgeTree's web interface)
  - Canceling check-out
  - Opening/checking-out a document from Office

- Check in

  Checked-out documents must be checked back in to KnowledgeTree before other users can check it out 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.

  See Also:
  - Adding/checking in documents from Office
  - Checking in documents (KnowledgeTree web interface)
  - Adding new documents (KnowledgeTree web interface)

Incremented Versions

New documents are given version number 0.1.

Minor updates are incremented by 0.1 on check in (e.g. from 0.7 to .0.8); major updates are incremented by 1.0 (e.g. 1.x becomes 2.0). Edits are defined as 'major' or 'minor' on check in.

Version History

The Version History link in the Document info menu displays a history of version changes on a currently selected document.

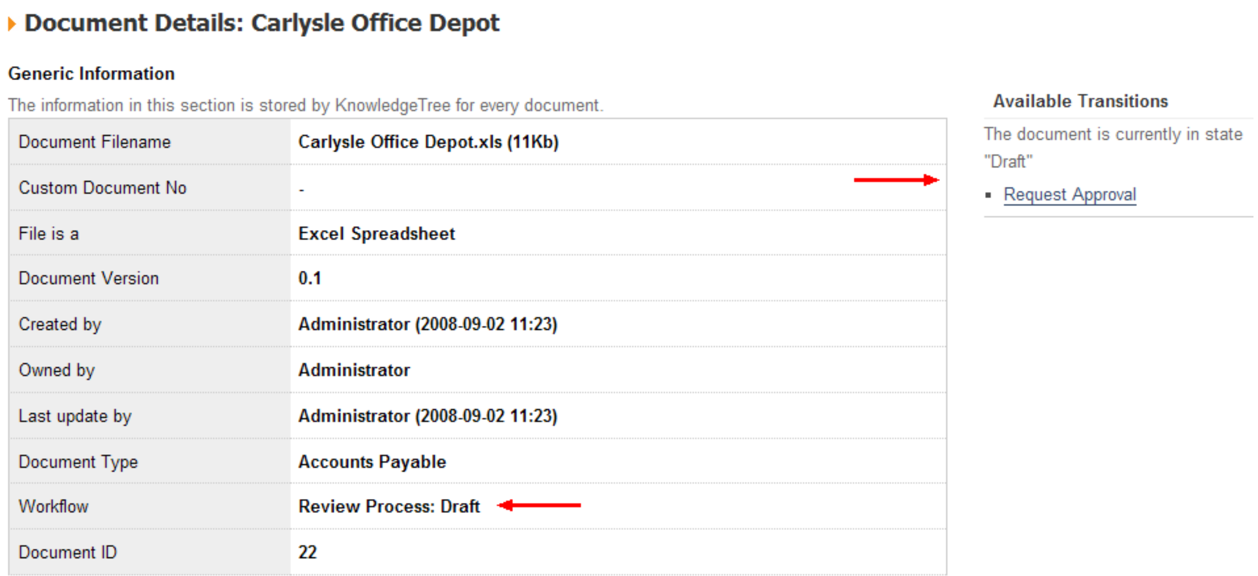
See Also:

- Viewing document transaction history
- Viewing / comparing versions
- Document version comparison

1.4.4 Workflows

Workflows are a business process added to KnowledgeTree by your system administration. The workflow maps to a document life-cycle as a pre-defined series of states and transitions that a document must pass through before it is considered complete.

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.



Document Details: Carlysle Office Depot

Generic Information

The information in this section is stored by KnowledgeTree for every document.

Document Filename	Carlysle Office Depot.xls (11Kb)
Custom Document No	-
File is a	Excel Spreadsheet
Document Version	0.1
Created by	Administrator (2008-09-02 11:23)
Owned by	Administrator
Last update by	Administrator (2008-09-02 11:23)
Document Type	Accounts Payable
Workflow	Review Process: Draft
Document ID	22

Available Transitions

The document is currently in state "Draft"

- Request Approval

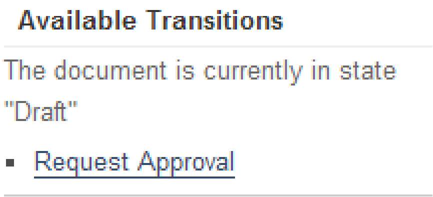
A document in a workflow

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 define how documents move between states in the workflow. Transitions are actions that move a document to the next state. For example, an Invoice document type may start in the state 'generated', after which it may be moved by the transition 'sent to client' to the state 'billed'. Permissions may affect transitions in a workflow component called a 'guard trigger', where only users with the appropriate permissions may be allowed to perform the transition.



What are Workflow Effects (Actions)?

Workflow Effects, set up by the system administrator, are used to grant, restrict, or deny access to your KnowledgeTree documents, based on the document's workflow state, For example, when a document reaches the relevant state, the state permissions may only allow users with the appropriate permissions to work on the document. In this example you may want to prevent documents in a Publication workflow from being checked out after they reach the state 'published'.

Notifications may also be set up as a Workflow Effect, to send notifications to selected roles or groups when the document reaches a particular state.

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 manually assign a workflow to a document you're working on, provided you have the required permissions, and the document is not part of a workflow by default (some document types may be automatically assigned to workflows).
Note: You cannot overwrite a document's current workflow.

See Also:
For more information about KnowledgeTree Workflows, and how to plan and add complete workflows, see the KnowledgeTree Administrator Manual.

Logging In

Part 2

2 Logging In

2.1 Logging in to the Web Interface

This procedure logs you in to KnowledgeTree's web interface.

Prerequisites:

- Obtain the URL (server address) to your KnowledgeTree domain from your system administrator
- Obtain your KnowledgeTree username and password from your system administrator

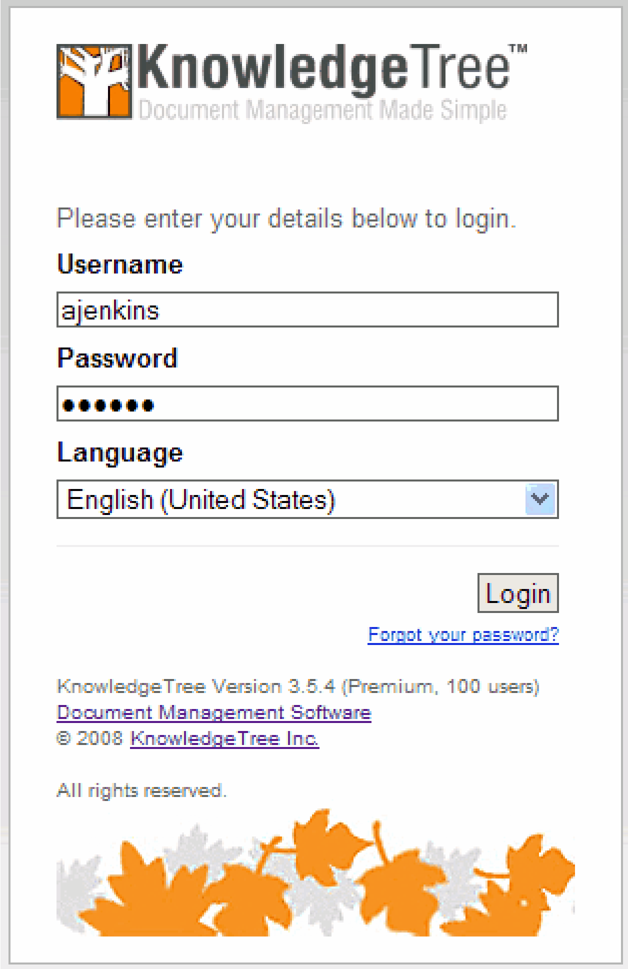
Perform the following steps:

1. Use your web browser to go to your KnowledgeTree domain, e.g. https://dms.acme.com.

2. On the KnowledgeTree Login page, enter your KnowledgeTree username and your KnowledgeTree password.

3. Click *Login*. KnowledgeTree's web interface opens at the dashboard.

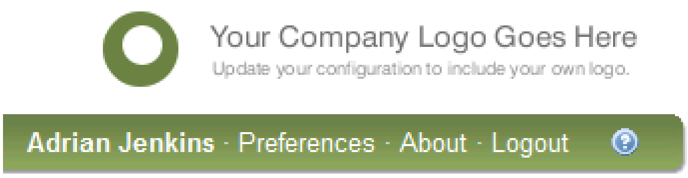
See Also:
Working in the Web Interface



2.2 Logging out of the Web Interface

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

Note: KnowledgeTree's web interface is set to time out where your user session has been inactive for a predefined period. You will need to log in to the system to continue working (the system re-opens the page where your session timed out).



2.3 Logging in through KnowledgeTree Explorer

This procedure logs you in to KnowledgeTree through KnowledgeTree Explorer on a Windows computer.

Note: KnowledgeTree Explorer displays the same file and folder hierarchy as in KnowledgeTree's Web interface. This is a permissions-based view - you will only see the content for which you have at least *'read' permissions.*

Pre-requisites:

- KnowledgeTree Commercial Edition server installed and all services running
- 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 on the client machine where you're logging in
- 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. On Windows, click the KnowledgeTree Explorer desktop shortcut, or click Start - Programs - KnowledgeTree Tools - KnowledgeTree Explorer to launch KnowledgeTree Explorer.

2. A connection is established with the KnowledgeTree server, and KnowledgeTree Explorer opens, displaying the files and folders in the KnowledgeTree repository.
   Note: If a connection cannot be established, the default connection may be unavailable. Please request assistance from your KnowledgeTree administrator.

Working with KnowledgeTree Client Tools for Windows

Part 3

3 Working with KnowledgeTree Client Tools for Windows

This chapter provides information on working with KnowledgeTree through the KnowledgeTree Client Tools for Windows (KnowledgeTree Explorer, KnowledgeTree Desktop Imaging, and the KnowledgeTree Add-ins for Microsoft Office integration).

3.1 Using KnowledgeTree Explorer

This topic explains the KnowledgeTree Client Tools for Windows user interface, and describes the document management actions you may perform through this interface.

Commercial Editions Only

KnowledgeTree Explorer provides a familiar, Windows Explorer-type view of KnowledgeTree's Web-based repository, and allows you to work with content in the KnowledgeTree as though you're working on your local computer, without having to log in through KnowledgeTree's Web interface.

How do I log in to KnowledgeTree Explorer?

The KnowledgeTree Explorer User 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 in KnowledgeTree. 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:

<table>
<tr><th colspan="3">Click...</th><th>Result</th></tr>
<tr><td rowspan="8">Location menu</td><td colspan="2">Connect</td><td>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.</td></tr>
<tr><td rowspan="3">Browse</td><td>Open KnowledgeTree</td><td>Opens KnowledgeTree's Web interface.</td></tr>
<tr><td>Show My Check-outs</td><td>Opens the Checked Out folder on your local computer - displays your currently checked out files.</td></tr>
<tr><td>Show My Downloads</td><td>Opens the Downloaded folder on your local computer - displays files downloaded from the repository.</td></tr>
<tr><td rowspan="2">New</td><td>Document</td><td>Allows you to navigate to a locally stored document that you want to add to the repository.</td></tr>
<tr><td>Folder</td><td>Opens the Folder Properties dialog box - define a name for the folder you're adding; then, click Ok to add the folder.</td></tr>
<tr><td colspan="2">Refresh</td><td>Reloads content from the repository, providing an updated view.</td></tr>
<tr><td colspan="2">Close</td><td>Closes KnowledgeTree Explorer.</td></tr>
<tr><td rowspan="2">Tools menu</td><td colspan="2">Reload Tools</td><td>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.</td></tr>
<tr><td colspan="2">Scan Document into this location ...</td><td>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.</td></tr>
</table>

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 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	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.

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.

3.1.1 Viewing / Editing Document Properties

This procedure displays and edits document properties on a currently selected document in KnowledgeTree Explorer.

Commercial Editions Only

Perform the following steps:

1. On your Windows computer, log in to KnowledgeTree Explorer.

2. Locate the document; then, right click to display options.

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: Changing the document type removes stored metadata. The admin user defines displayed fields. To edit field values, select the field; then, tab to the right of the field where you can change the values.*

3.1.2 Document Properties Dialog Box

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

Commercial Editions Only

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

The Document Properties dialog box contains the following tabs:

⊟ 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 document URL (location of the document on the KnowledgeTree server)
- the document folder URL (location of the document's folder 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.

How to start a workflow

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

How to view the current workflow state

If the document is already in a workflow, view the current workflow state on the Workflow tab.

- 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.

- How to change the document type and associated 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.

3.2 Using the KnowledgeTree Office Integration Add-in

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.

Commercial Editions Only

Note: 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 displays the keyboard shortcuts used to work with KnowledgeTree 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, 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	

3.2.1 Adding New and Edited Documents to KnowledgeTree

This procedure saves an edited file back to KnowledgeTree, and adds new files to KnowledgeTree, from within a Microsoft Office application (PowerPoint, Excel, or Word).

Commercial Editions Only

Perform the following steps:

1. Open the file in the relevant Microsoft Office application.

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.

3.2.2 Opening KnowledgeTree Documents in Office

This procedure retrieves a file from KnowledgeTree and opens the file for editing in Microsoft Office.

Commercial Editions Only

Perform the following steps:

1. Open the relevant Microsoft Office application.

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.

3.3 Using KnowledgeTree Desktop Imaging

This topic provides information about the features and functionality of KnowledgeTree Desktop Imaging.

Commercial Editions Only

What is 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.

How are images acquired?

Images may be acquired from an external imaging device (scanner) as follows:

- Manually scan one page - place the page you want to scan face down on the scanner flatbed, then launch the Document Imaging Scan Wizard.

- Automatically scan multiple pages - 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 may choose a scan option from the flatbed or ADF only where your imaging device includes both of these options.

What if images are scanned in the wrong order? Can they be re-ordered after scanning?

After scanning, before the document is saved to KnowledgeTree, scanned documents are displayed in a queue within the KnowledgeTree Desktop Imaging interface, and an onscreen counter displays the number of documents in the queue (e.g. page 1 of 1; or, page 5 or 10, etc.). Queued pages cannot be re-ordered in the queue, but you may choose pages that you want to remove from the queue, or choose a position in an existing queue to add new pages.

In this way, if you have scanned a multi-page document and one or more pages are scanned in the wrong order, you won't need to re-scan the entire document, just delete the incorrectly ordered documents and re-scan those pages to the correct location in the queue.

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 as a document to KnowledgeTree?

After scanning all required pages, you will need to define a document title, file type, document type, and a 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.

⊟ Search, and Scanned Documents

KnowledgeTree allows you to save documents scanned through KnowledgeTree Desktop Imaging as either multi-page TIFF images, or as PDF documents.

Although both formats (TIFF and PDF) save data to KnowledgeTree, TIFF files are not indexed and the content of TIFF files is not searchable. The text content of PDF documents is partly searchable

Searching 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.

3.3.1 Scanning Documents in KnowledgeTree Explorer

This procedure scans one or more pages from your imaging device (scanner) directly into KnowledgeTree, from KnowledgeTree Explorer.

Commercial Editions Only

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).

3.4 Using KnowledgeTree Outlook Integration

This topic provides information about working with KnowledgeTree Outlook Integration - a KnowledgeTree Add-in for Microsoft Outlook.

Commercial Editions Only

Note: The Microsoft 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 of KnowledgeTree Outlook Integration

The table defines the functionality available through KnowledgeTree Outlook Integration:

Feature	Function
Archive emails, including their attachments	Saves emails, including attachments, to a location that you select in KnowledgeTree, or to a predefined location in KnowledgeTree *Note: This feature allows you to optionally add metadata.*
Send files from KnowledgeTree as attachments with outgoing emails	Allows you to locate a file in KnowledgeTree, from within Microsoft Outlook, and attach the file to an outgoing email.
Email archive prompt	Configure the KnowledgeTree Outlook Add-in to display a system message that asks you, when closing emails, whether to save the message to KnowledgeTree, if it has not yet been saved to KnowledgeTree
Add 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.*

KnowledgeTree Outlook User Interface

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

KnowledgeTree Save Email button	The KnowledgeTree Save Email button saves the currently selected, unsaved email to the KnowledgeTree repository.

<table>
<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="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.

3.4.1 Configuring Email Repository Settings

This procedure configures email repository settings for KnowledgeTree Outlook Integration.

Commercial Editions Only

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 ...

- add or edit 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.

- 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).

- 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.

- 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*.

3.4.2 Emailing Attachments from KnowledgeTree in Outlook

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

Commercial Editions Only

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 KnowledgeTree 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.

3.4.3 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.

Working in KnowledgeTree's Web Interface

Part 4

4 Working in KnowledgeTree's Web Interface

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

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.)

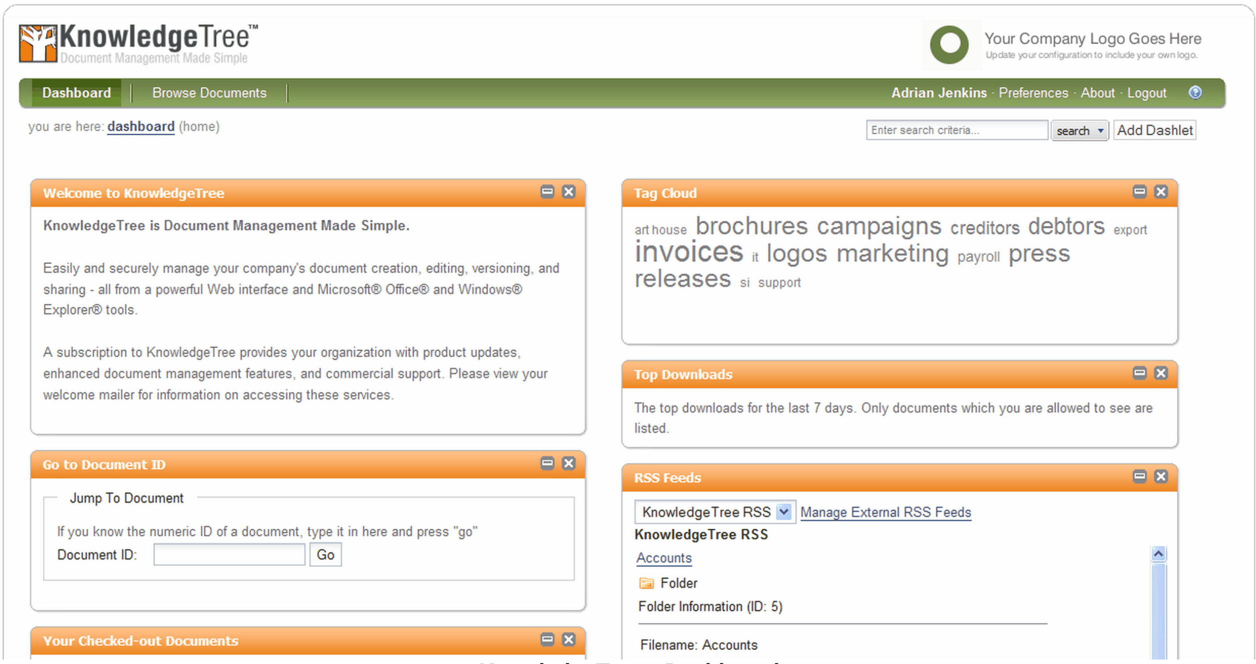
- Browse Documents - provides access to the repository folder structure and content in the document management system, including folder and document actions.

- 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

Note: The KnowledgeTree system administrator and other users with system administrator privileges will see an additional tabbed section on the KnowledgeTree web interface - DMS Administration. KnowledgeTree is configured and managed almost entirely through DMS Administration.



KnowledgeTree Dashboard

4.1 KnowledgeTree Search

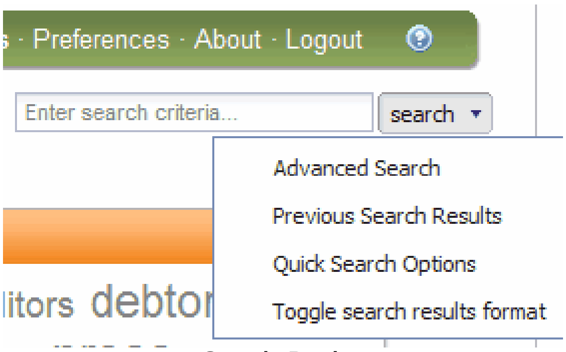
KnowledgeTree's Search functionality allows you to ...

- search for documents and folders
  Note: Search results include document and folders, and any shortcuts to documents and folders that match specified search criteria.
- 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'



Search Portlet

4.1.1 Using Search

The following procedures allow you to search KnowledgeTree through the Web interface.

An important function of an electronic document management system is the ability to efficiently and quickly find any documents and folders added by users in your organization, provided you have the required permissions to access the content you're looking for.

KnowledgeTree provides a powerful search mechanism with various options for searching the system and finding relevant content.

Note: Search results include document and folders, and any shortcuts to documents and folders that match specified search criteria.

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*
- *Search relies on data extracted during indexing*
- *To change the way search results display, you can toggle the search results view on the search bar drop down menu*

How to run a Quick Search

1. Log in to KnowledgeTree's web interface; then, enter search criteria in the Search bar, either of the following:

   - a single letter, e.g. 'k'

   - a single letter, plus '*' (e.g. d* finds content matching words starting with 'd')

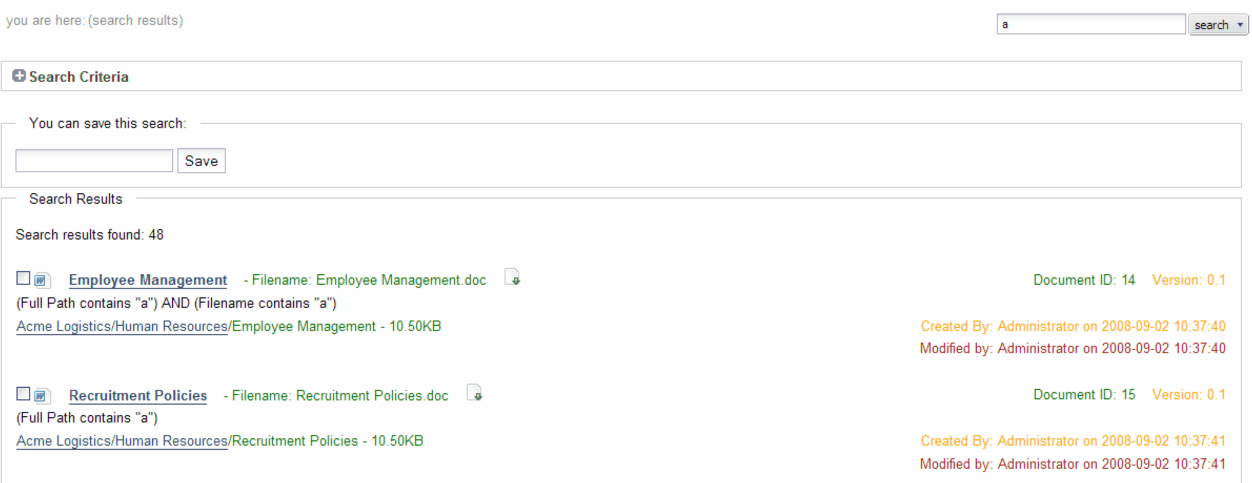
   - a single word, or part of a word, e.g. 'templates' or 'temp'
     Note: Content search results match exact phrases and highlight partial matches.
     All database queries (metadata) match partially.

   - start and end of a word, with '*' (e.g. d*k finds words starting with 'd' and ending with 'k')

   - use '?' to match a single character only

   Note: The default quick search is on 'Content and Metadata' (matches metadata field values, filename, full path, document ID, document content, and discussions). To limit your search to Metadata only (matches metadata values), click the down arrow adjacent to the search button to change the quick search option.

2. Press Enter, or click the *search* button; then, view search results.



Results of a quick search - searched on 'a'

How to create an Advanced search

1. Open KnowledgeTree's web interface; then, on the search drop-down menu, select *Advanced Search*.

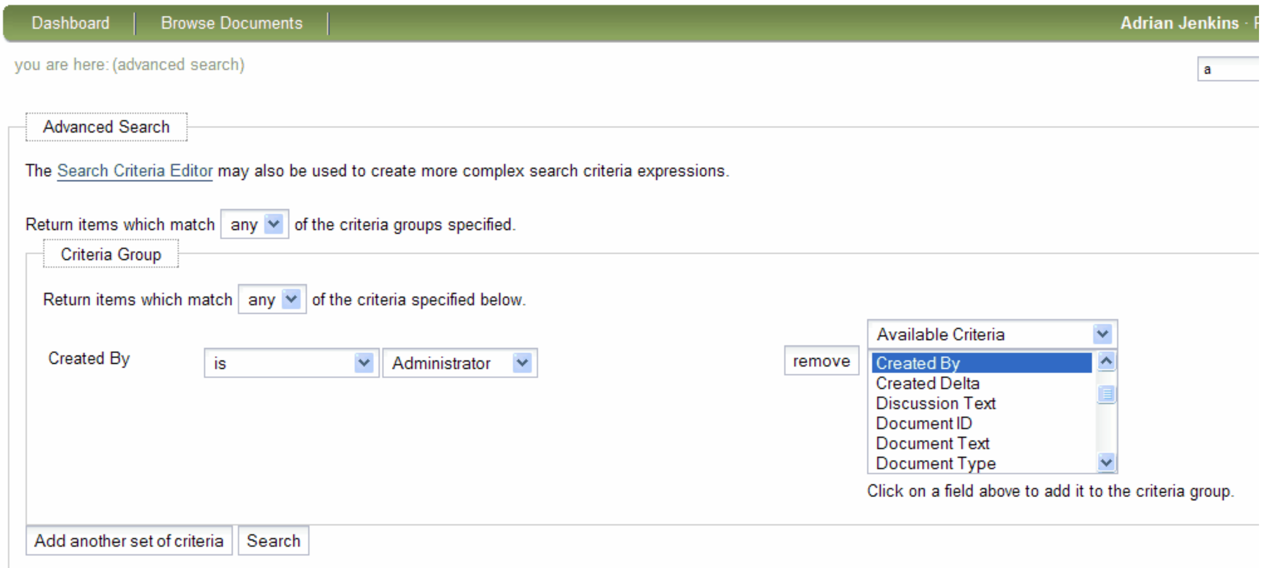
2. On the Advanced Search page, define a criteria group.
   2.1. In the first drop-down, filter your search by ...
   - Available Criteria
   - Available Fieldsets
   - Available Workflows

   Note: The first criteria selection is a filtering mechanism that allows you to search only by criteria, fieldsets, or workflows - having selected the high level search criteria, the criteria relevant to the group selected displays in the second drop-down.

   2.2. Select criteria from the data available in the selected filter component, e.g. 'Available Workflows' displays all default and custom workflows in your system.

   2.3. Define more search criteria, as applicable for the selected criteria filters, if any.
   Note: In some cases, after you select a second level criteria filter, a third selectable field may display, where you can further refine the selected criteria.

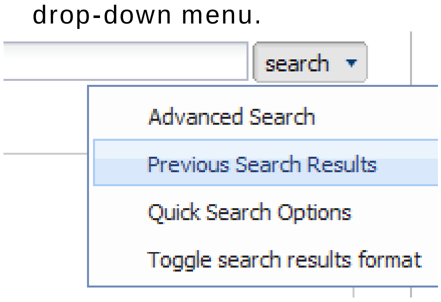
   2.4. Do *one* of the following:
   - To add more criteria to this criteria group, go back to step 2.1 in this procedure.
   - To add another criteria group, click *Add another set of criteria*; then, go back to step 2.1 in this procedure to define criteria for the group.
   - To start searching on currently defined criteria now, click *Search*.



Advanced Search criteria

How to run a past search

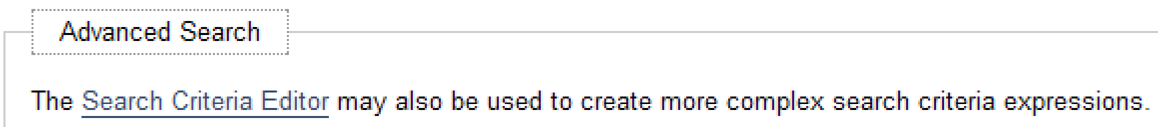
1. To view the results of your last search, select *Previous Search Results* on the search drop-down menu.



How to run a complex search

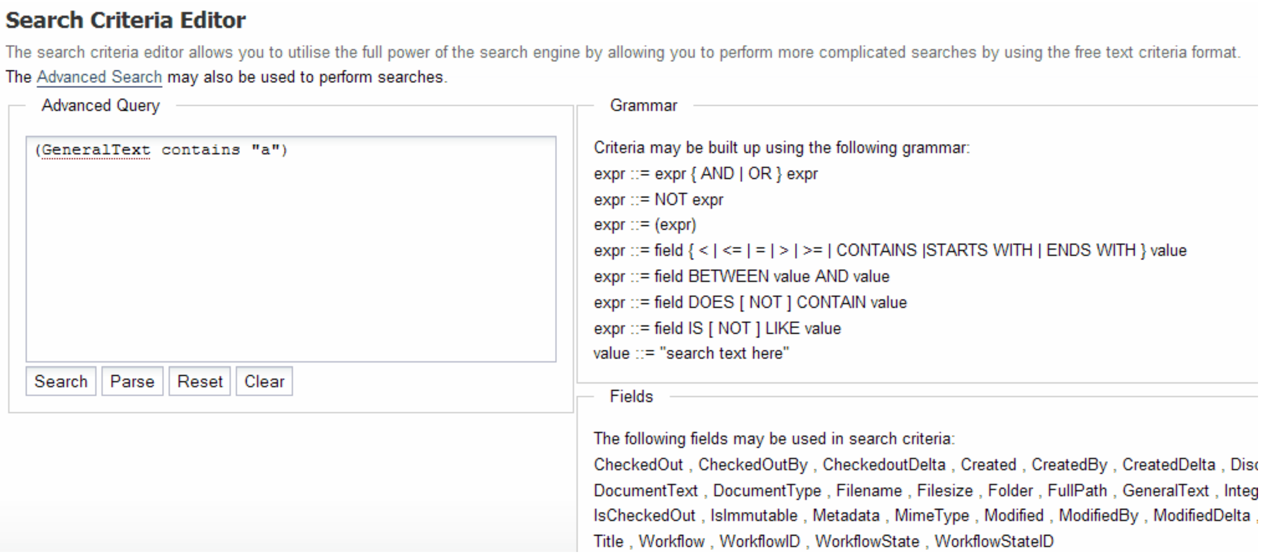
1. Open KnowledgeTree's web interface; then, in the search drop down menu, select *Advanced Search* to open the Advanced Search page.

2. On the Advanced Search page, click *Search Criteria Editor*.



3. In the Search Criteria Editor, build up a search expression using the following grammar:
   expr ::= expr { AND | OR } expr
   expr ::= NOT expr
   expr ::= (expr)
   expr ::= expr { < | <= | = | > | >= | CONTAINS |STARTS WITH | ENDS WITH } value
   expr ::= field BETWEEN value AND value
   expr ::= field DOES [NOT] CONTAIN value
   expr ::= field IS [NOT] LIKE value
   value ::= "search text here"

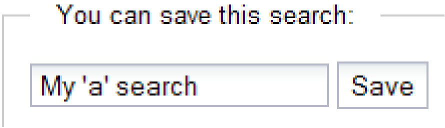
Note: A field may be one of the following:
CheckedOut, CheckedOutBy, CheckedoutDelta, Created, CreatedBy, CreatedDelta, DiscussionText, DocumentId, DocumentText, DocumentType, Filename, Filesize, Folder, GeneralText, IsCheckedOut, IsImmutable, Metadata, MimeType, Modified, ModifiedBy, ModifiedDelta, Tag, Title, Workflow, WorkflowID, WorkflowState, WorkflowStateID



Search Criteria Editor

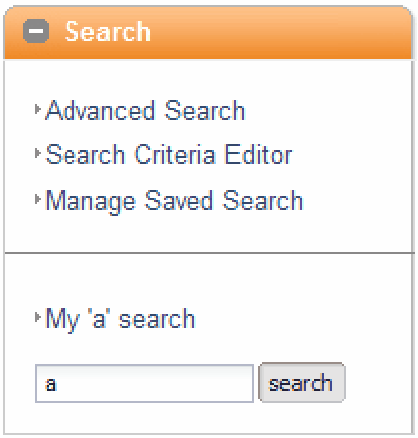
How to save a search

1. Create a search.
2. On the search results page, in the section headed You can save this search, define a name for the search.
3. Click *Save*.



How to run a saved search

1. Open Browse Documents.
2. View the list of available saved searches in the Search menu at the bottom of the page.
3. Click on a saved search to run the search.

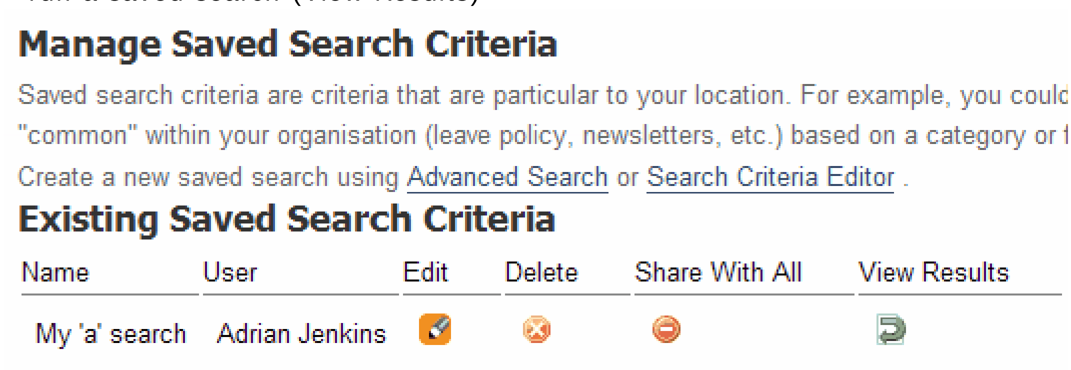


4. View search results.

How to manage existing saved searches

1. Open Browse Documents.
2. Locate the Search menu at the bottom of the page to view existing saved searches.
3. Click *Manage Saved Search* to open the Manage Saved Search Criteria page.
4. On this page you can:

- edit or delete a saved search
- create a new search
- share a saved search (if this option is available)
- run a saved search (View Results)



See Also:

- *Search2 User Guide on the KnowledgeTree Wiki*
- *Search2 Optimization on the KnowledgeTree Wiki*

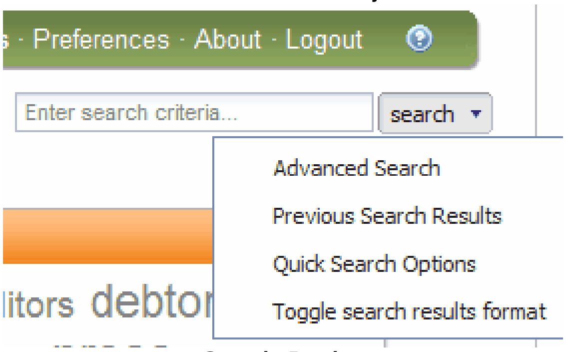
4.1.2 Toggling Search Results Format

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.

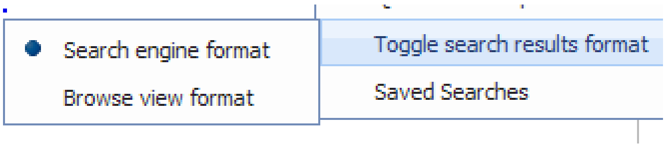
2. Locate the 'search' portlet at the top right of the page beneath the navigation bar; then, click the down arrow adjacent to the search button to display the search options menu.



Search Portlet

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

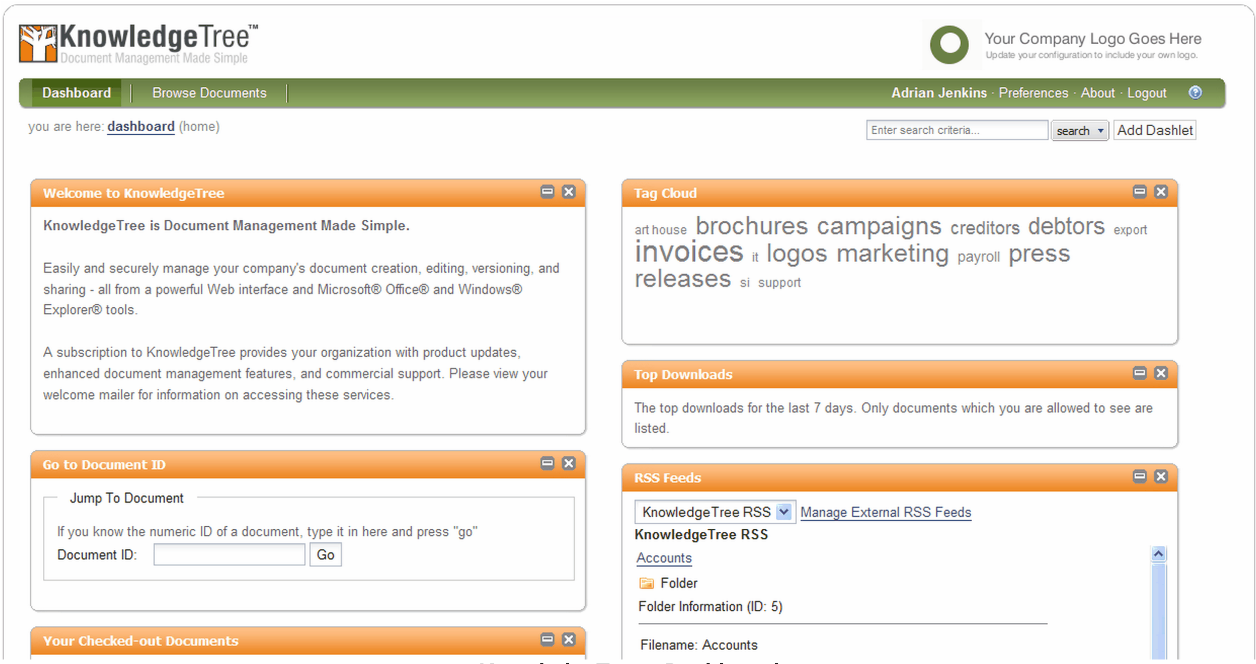
- Search engine format
- Browse view format



4.2 Dashboard

The KnowledgeTree Dashboard is the 'Home Page' of your document management system. By default, KnowledgeTree opens at the Dashboard after you log in.

Note: Some items on the dashboard are only available in KnowledgeTree Commercial Editions.



KnowledgeTree Dashboard

Action

Search - Use the Search bar to perform simple or advanced searches of the repository. This document provides full instructions for using KnowledgeTree's search.

Dashlets

The dashboard contains a number of dashlets relevant to your login user profile, such as a list of any documents you have checked out, and other items requiring your attention.

- 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.

- Go to Document ID - enter the Document ID in the dashlet to go directly to the document in KnowledgeTree. Commercial Editions Only
  Note: If the document ID references an archived document, an onscreen form allows you to request that the document is restored to KnowledgeTree's content repository from the archive.

- Your Checked-out Documents - lists any documents you currently have checked out of KnowledgeTree. Commercial Editions Only

- Quicklinks - displays predefined links to frequently accessed documents. Commercial Editions Only

- Top Downloads - lists the 5 documents most downloaded from KnowledgeTree in your organization, over the past 7 days. Only documents for which you have at least the 'read' permission is included in the list. Commercial Editions Only

- Recently Viewed Items - lists the documents and folders last viewed by you (the currently logged in user). Commercial Editions Only
- Tag Cloud - displays tags defined by all KnowledgeTree users. Click on a tag to view a permissions-restricted list of content associated with the selected tag. *How can I add and use tags?*
- RSS Feeds - displays existing RSS feeds on external content (blogs, external websites, etc.) and on internal content. Click on the link in the dashlet to add, edit, or remove RSS feeds. How do I add RSS feeds?
- Orphaned Folders - lists folders that you need to be allowed to access, but not through browsing or navigating the folder structure, due to permission restrictions on your user profile at higher layers of the folder structure.
- My Dropped Documents - your personal workspace for use with KnowledgeTree Drop Box; lists the five most recent document uploaded through KnowledgeTree Drop Box. Click the link in the dashlet to view your Dropped Documents folder, where you can view all documents uploaded through KnowledgeTree Drop Box, and from where dropped documents may be moved or copied elsewhere in the system.
- WebDAV Connection Information - displays instructions for connecting to your WebDAV server.
- Recently Added/Changed Documents - displays a permissions-based list of last 5 documents added or modified by any KnowledgeTree user, but is restricted to those documents for which you have at least the 'read' permission.
- Pending Documents - displays any documents requiring your attention in a workflow.
- Notifications - displays a notice to inform you when actions have occurred on folders where you have subscriptions set up, and other system-generated notices.

4.2.1 Notifications and Alerts

KnowledgeTree's Notifications functionality can alert you when changes are made to folders where you have subscriptions set up, and when your input is required on a workflow.

Subscription and Workflow notifications display on the Web interface dashboard, and may be sent to you via email, if you have this function enabled on your user profile in the Preferences tab.

Find out more about Notifications and Alerts in the following topics:
- Configuring alerts - setting up alerts on documents
- Using Subscriptions - subscribing to documents, folders, and subfolders
- Viewing/Editing User Profile - enabling email notification
- Workflows - about workflow alerts

4.2.2 Configuring the Dashboard

This procedure configures your view of KnowledgeTree's web interface dashboard by moving, hiding, or minimizing dashlets.

Perform the following steps:

1. Log in to KnowledgeTree's web interface. The dashboard opens by default, or, click Dashboard on the toolbar to open 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.

4.2.3 Adding / Editing Quicklinks

This procedure adds new quicklinks, and changes the way quicklinks display on the dashboard.

Commercial Editions Only

Note: This functionality is only available in KnowledgeTree Commercial Editions.

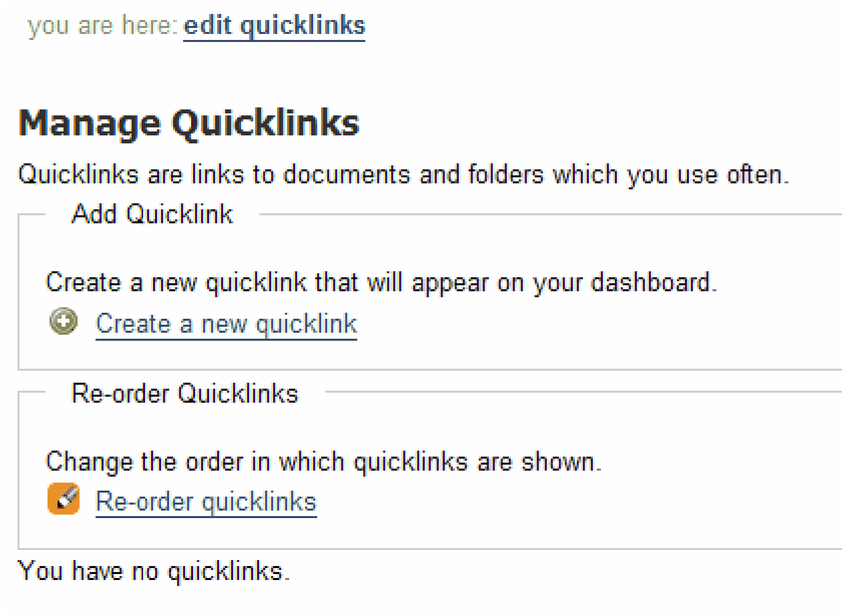
Perform the following steps:

1. Log in to KnowledgeTree's Web interface. By default, the system opens at the dashboard.

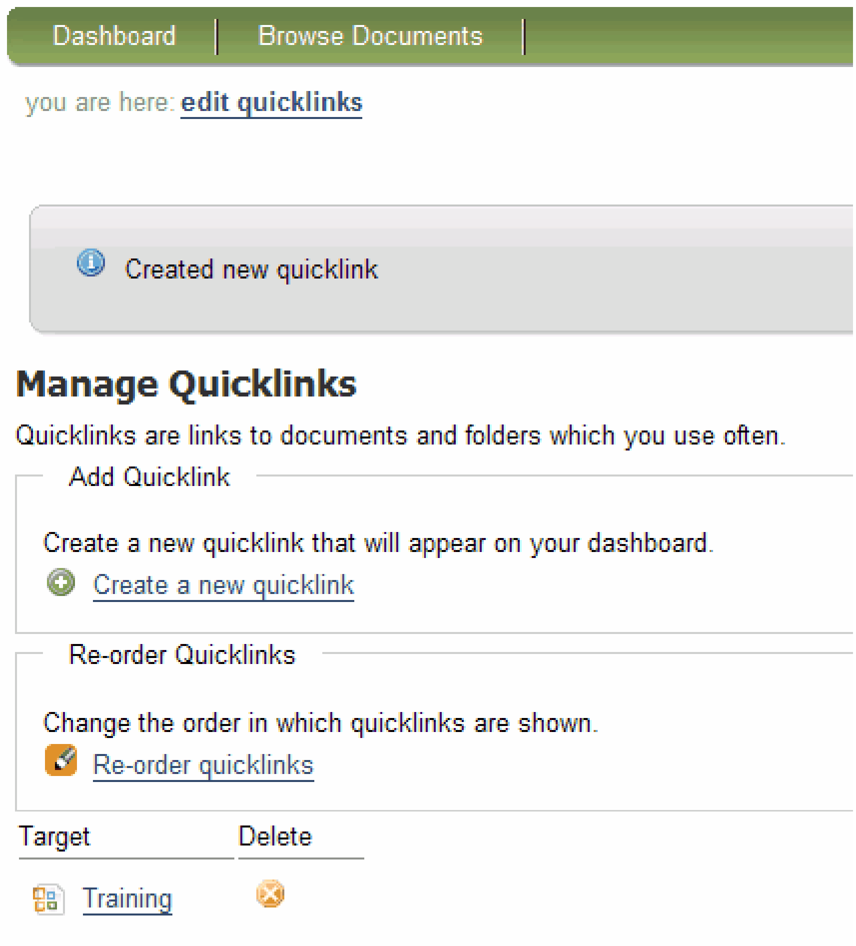
2. In the Quicklinks dashlet click *Manage Quicklinks* to open the Quicklinks configuration screen.

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*.



Add New Quicklink



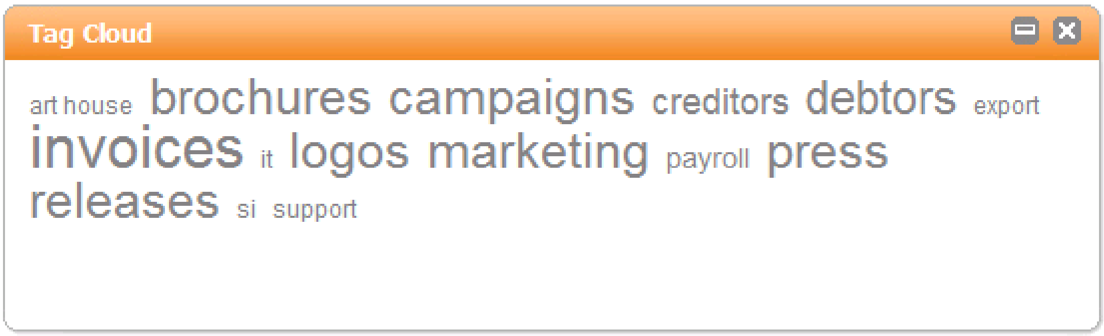
View existing Quicklinks

4.2.4 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 provide users with a visual overview of the type of content in the document repository.



The Dashboard Tag Cloud

4.2.4.1 Adding Tags

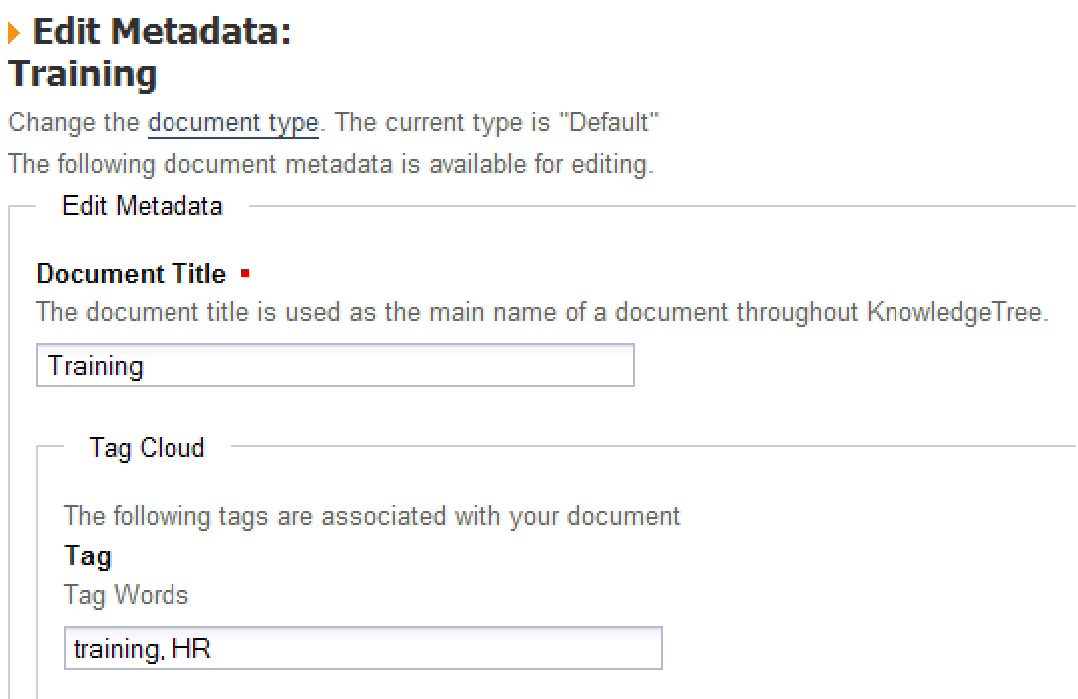
This procedure adds new tags to the dashboard Tag Cloud.

Pre-requisite:

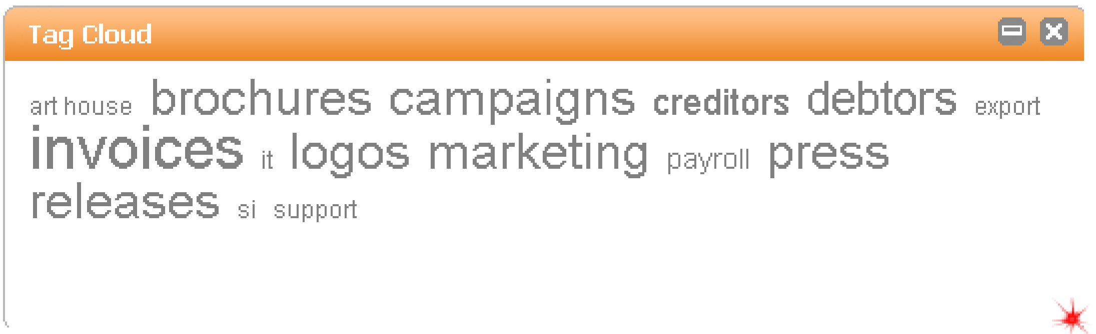
- The Tag Cloud plugin, installed and enabled, to ensure the Tag Cloud dashlet displays on the Dashboard

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open Browse Documents.
2. Locate the document where you want to add tags; then, open the document's Details page.
3. Click *Edit Metadata*. On the metadata editing screen, add relevant tags in the Tag Words field.
4. To verify that the tags you added display in the dashboard Tag Cloud, open the Dashboard. Test the tags by clicking on the tag word in the dashlet. All documents associated with the tag are returned in a permissions-restricted search results list.



Add tags



Tag Cloud on the dashboard

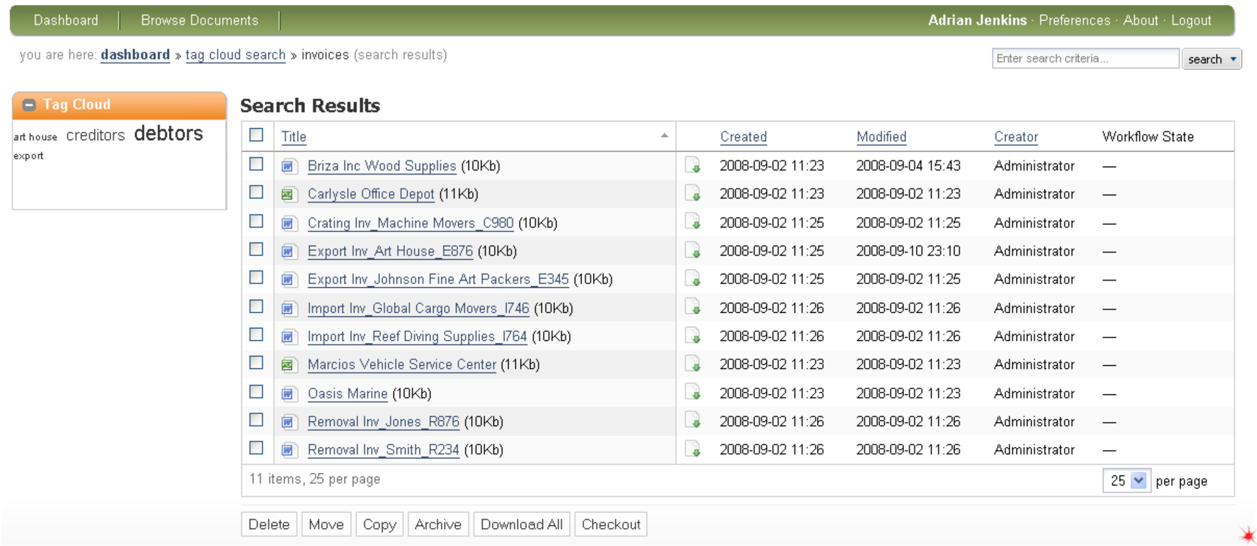
4.2.4.2 Using Tags

This procedures uses existing tags to find associated content in the repository.

Perform the following steps:

1. Log in to KnowledgeTree's web interface dashboard.
2. Locate the Tag Cloud dashlet; then, click on a tag in the dashlet to view results for this tag.
3. The system returns a permissions-restricted list of all content 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.



Tag search results

4.2.5 RSS Feeds

KnowledgeTree's RSS feeds feature 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 KnowledgeTree 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:

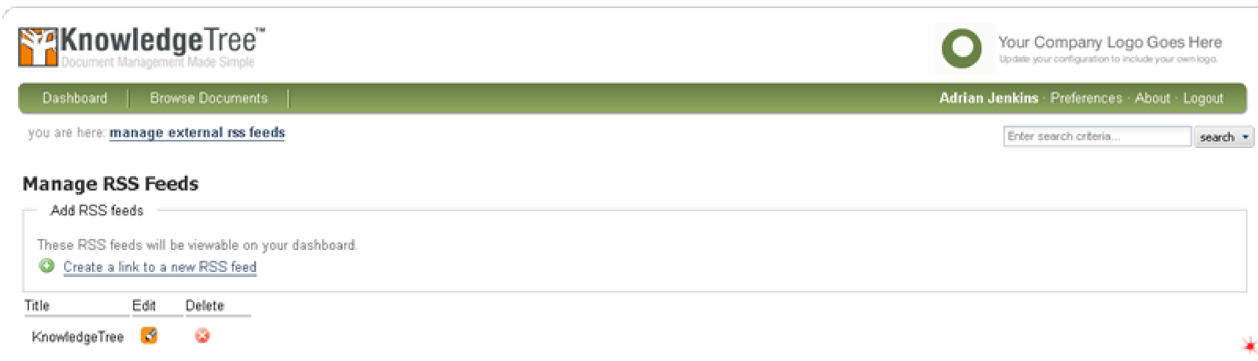
1. Set up External RSS Feeds: To subscribe to external content (news, blogs, etc.) from within KnowledgeTree, click *Manage External RSS Feeds* on the RSS Feeds dashlet.

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.

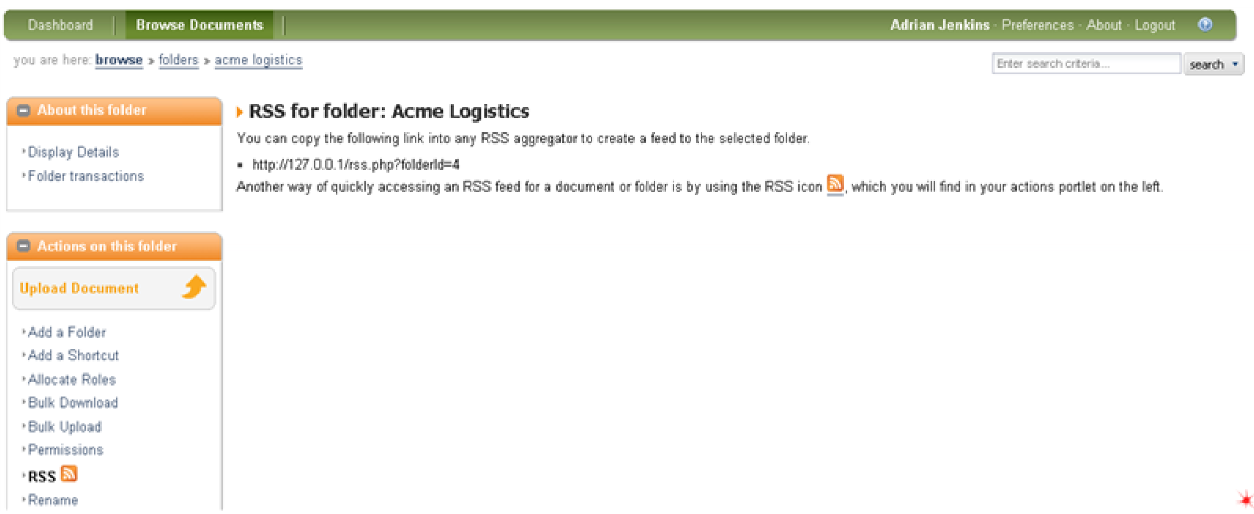
3. Set up an RSS feed on a document or folder, and use an external RSS Reader to monitor this content from outside KnowledgeTree. To do this, browse to the document or folder in KnowledgeTree; then, click the *RSS* icon in Actions on this Folder / Document Actions (as applicable) in Browse Documents. 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.

Screenshots

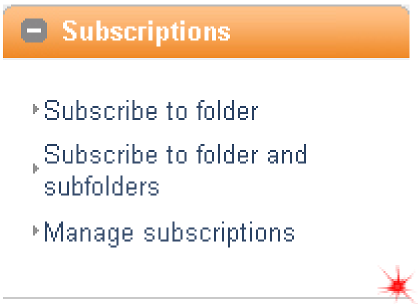
- Set up External RSS Feeds



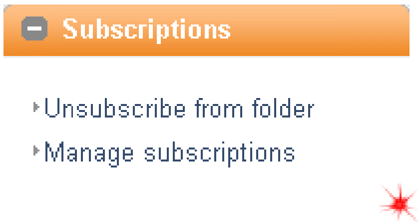
- Set up RSS feeds on documents or folders in KnowledgeTree and monitor these feeds from outside KnowledgeTree



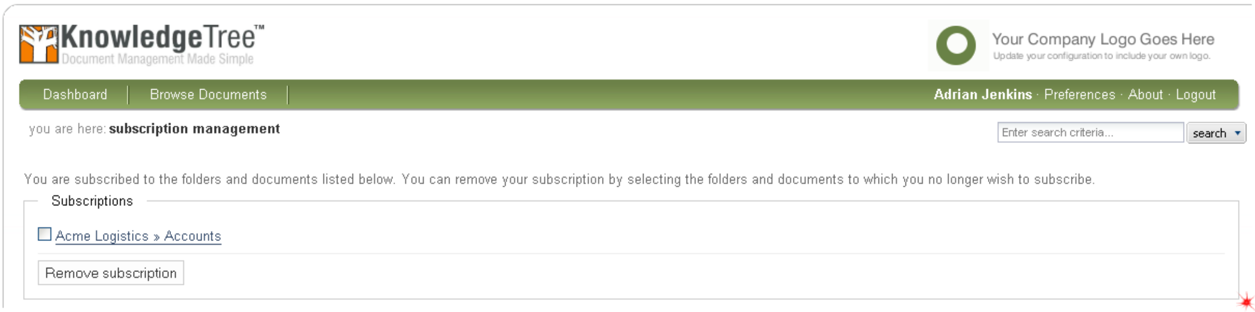
- Subscribe to a document or folder in KnowledgeTree



Subscriptions Menu



Subscriptions set up on a folder



See Also:

- Configuring External RSS Feeds
- Adding Internal RSS Feeds

4.2.5.1 Configuring External RSS Feeds

This procedure displays, edits, 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 KnowledgeTree? 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.

4.2.5.2 Adding Internal RSS Feeds

This procedure creates an internal RSS Feed.

Pre-requisite:
- RSS Feed reader, installed.

Perform the following steps:
1. Log in 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.

4.3 Browse Documents

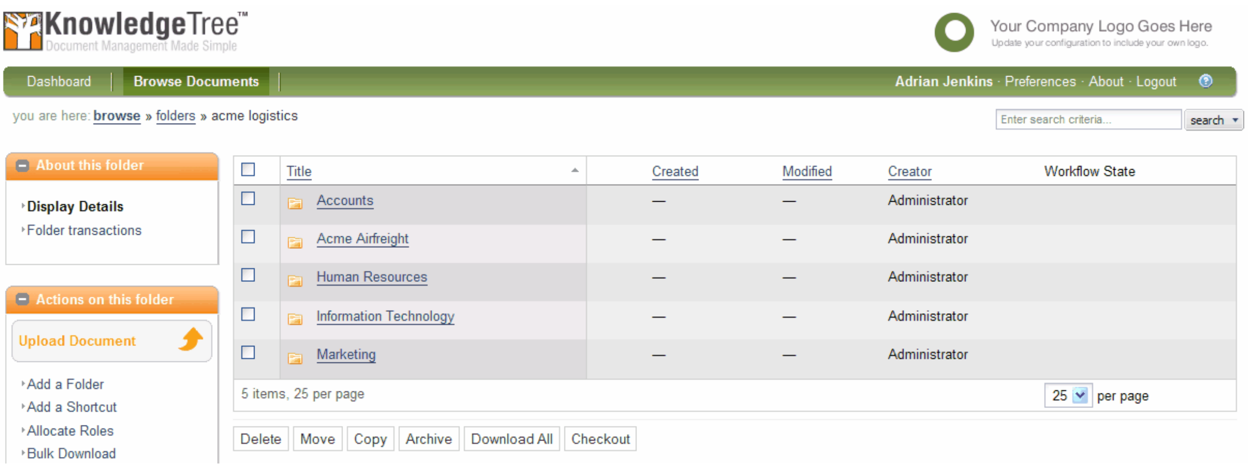
Browse Documents provides access to the folder structure, where you can work with documents and folders in the Web interface of the repository, and browse repository content.

Browse Views

You can choose to browse KnowledgeTree by ...

- 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.

See Browse by... for more information on changing the Browse View.



4.3.1 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.

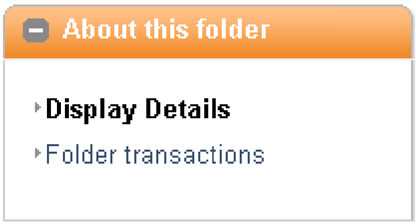
4.3.2 Working with Folders

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.

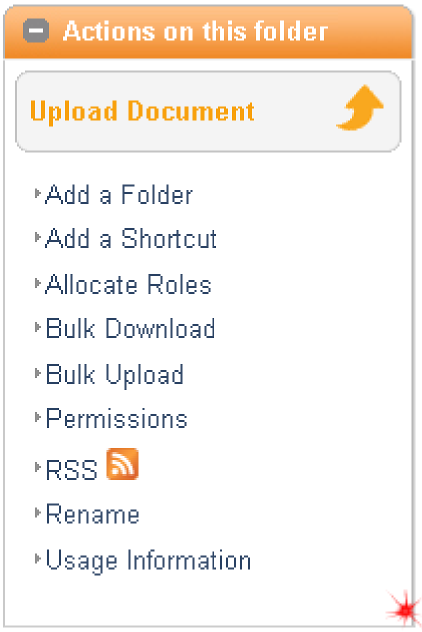
About this folder

- 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



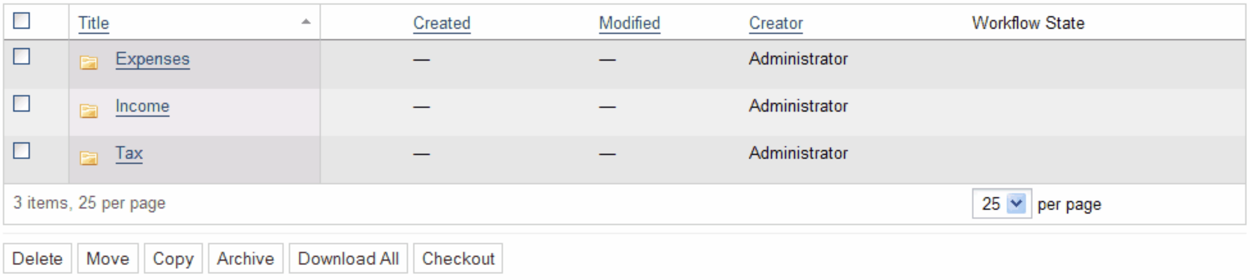
4.3.2.1 Viewing Folder Details and Folder Content

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'.

4.3.2.2 Viewing Folder Transaction History

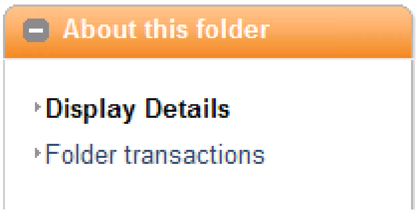
This procedure displays a folder transaction history for the folder at your current location in the web interface of the repository.

Perform the following steps:

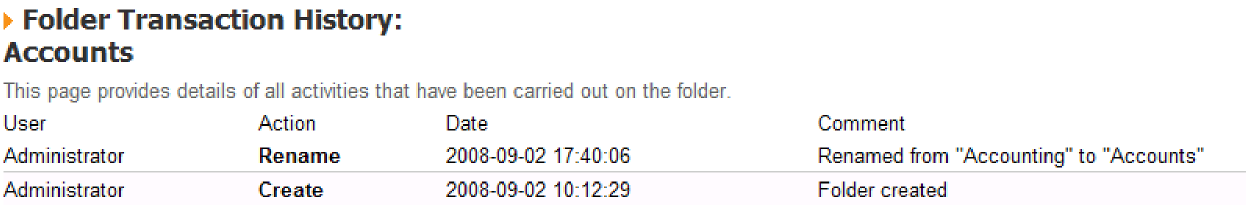
1. Log in to KnowledgeTree's web interface; then, click *Browse Documents* to enter the folder structure.

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.



Folder Transaction History: Accounts

This page provides details of all activities that have been carried out on the folder.

User	Action	Date	Comment
Administrator	**Rename**	2008-09-02 17:40:06	Renamed from "Accounting" to "Accounts"
Administrator	**Create**	2008-09-02 10:12:29	Folder created

4.3.2.3 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*.

4.3.2.4 Adding Shortcuts

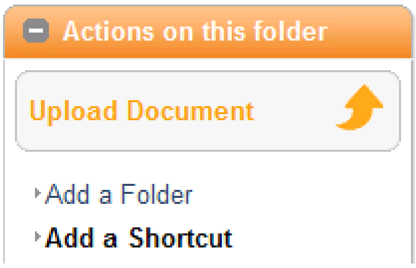
This procedure adds a shortcut in a selected folder, to another document or folder.

Commercial Editions Only
Note: This functionality is only available in KnowledgeTree Commercial Editions.

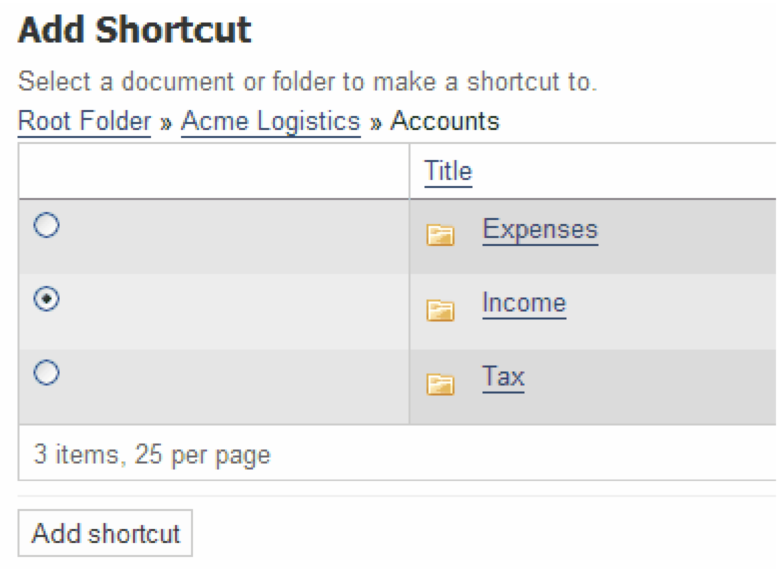
Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the folder where you want to add a shortcut - search for the folder, or navigate to the folder through the folder structure in Browse Documents.

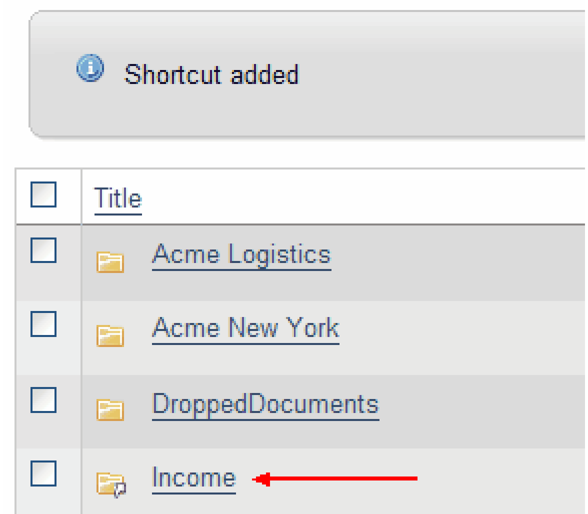
2. On the Actions on this folder menu, click *Add a Shortcut*.



3. Navigate to the target folder or document; then, select the folder or document for which you are adding this shortcut. Click *Add Shortcut*.



4. The name of the document of folder to which you created a shortcut displays in the list of contents in the folder. Clicking on the document or folder opens the Document Details page (for a document) or the folder contents (for a folder).



4.3.2.5 Bulk Downloading Folders

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.

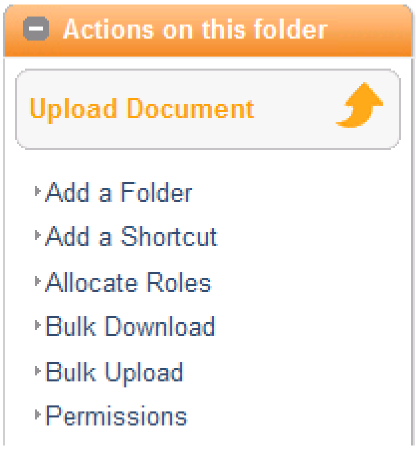
Pre-requisite:
You must have appropriate permissions on the folder for this action to display as an allowable action in the Actions on this folder menu.

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 Actions on this folder 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.

4.3.2.6 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 (Octboer 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.

4.3.2.7 Viewing Folder Permissions

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

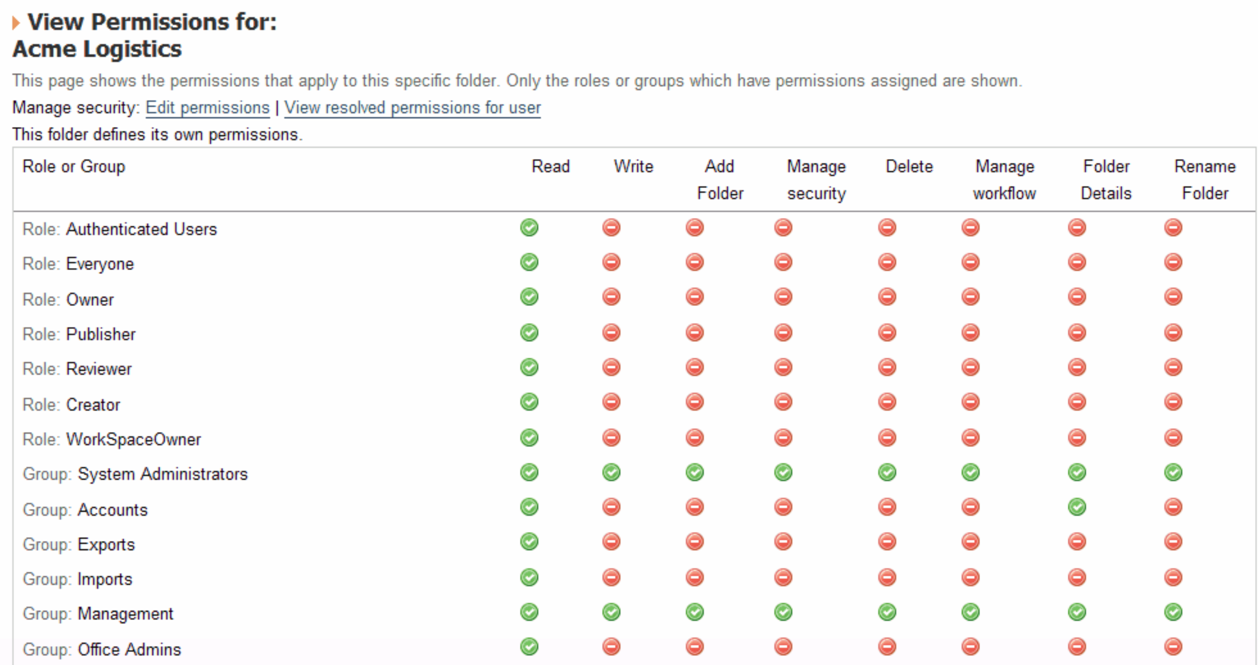
Note: This functionality is only available in the Actions on this folder menu if you have permissions for this action on the folder. For more information about viewing and editing folder permissions, see the KnowledgeTree Administrator Manual.

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.



4.3.2.8 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.

4.3.2.9 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

Commercial Editions Only

Note: This functionality is only available in KnowledgeTree Commercial Editions.

Perform the following steps:

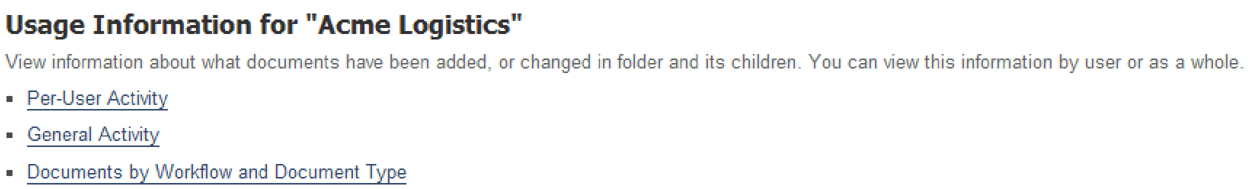
1. Log in to KnowledgeTree's web interface; then, search or browse to the relevant folder.

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.



4.3.3 Working with Documents

4.3.3.1 Adding Documents

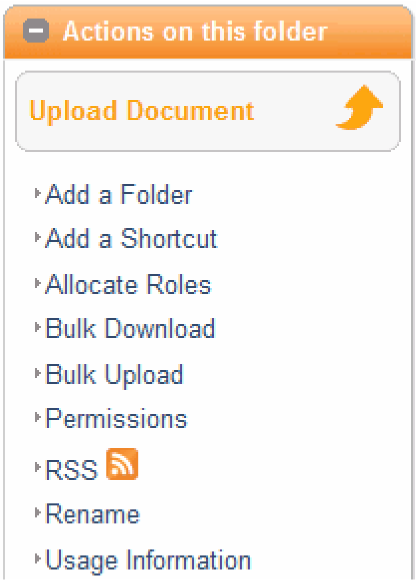
This procedure adds a new document to the currently selected folder in KnowledgeTree's web interface.

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.

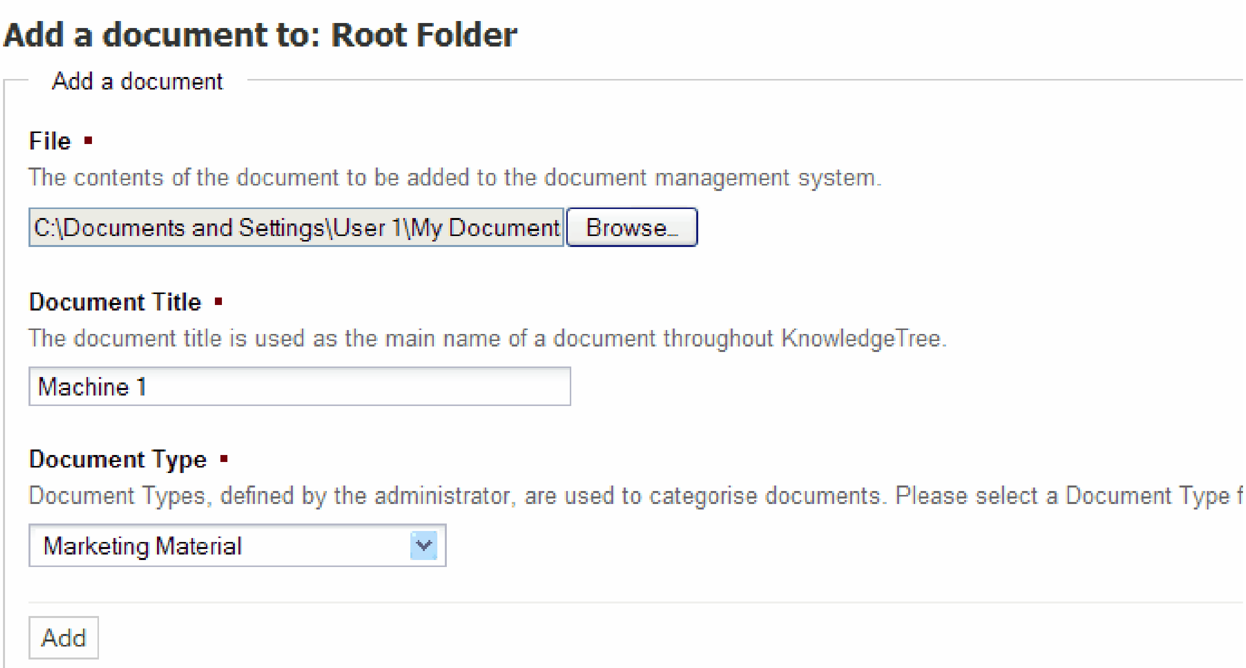
3. In the Actions on this folder menu click *Upload Document*.



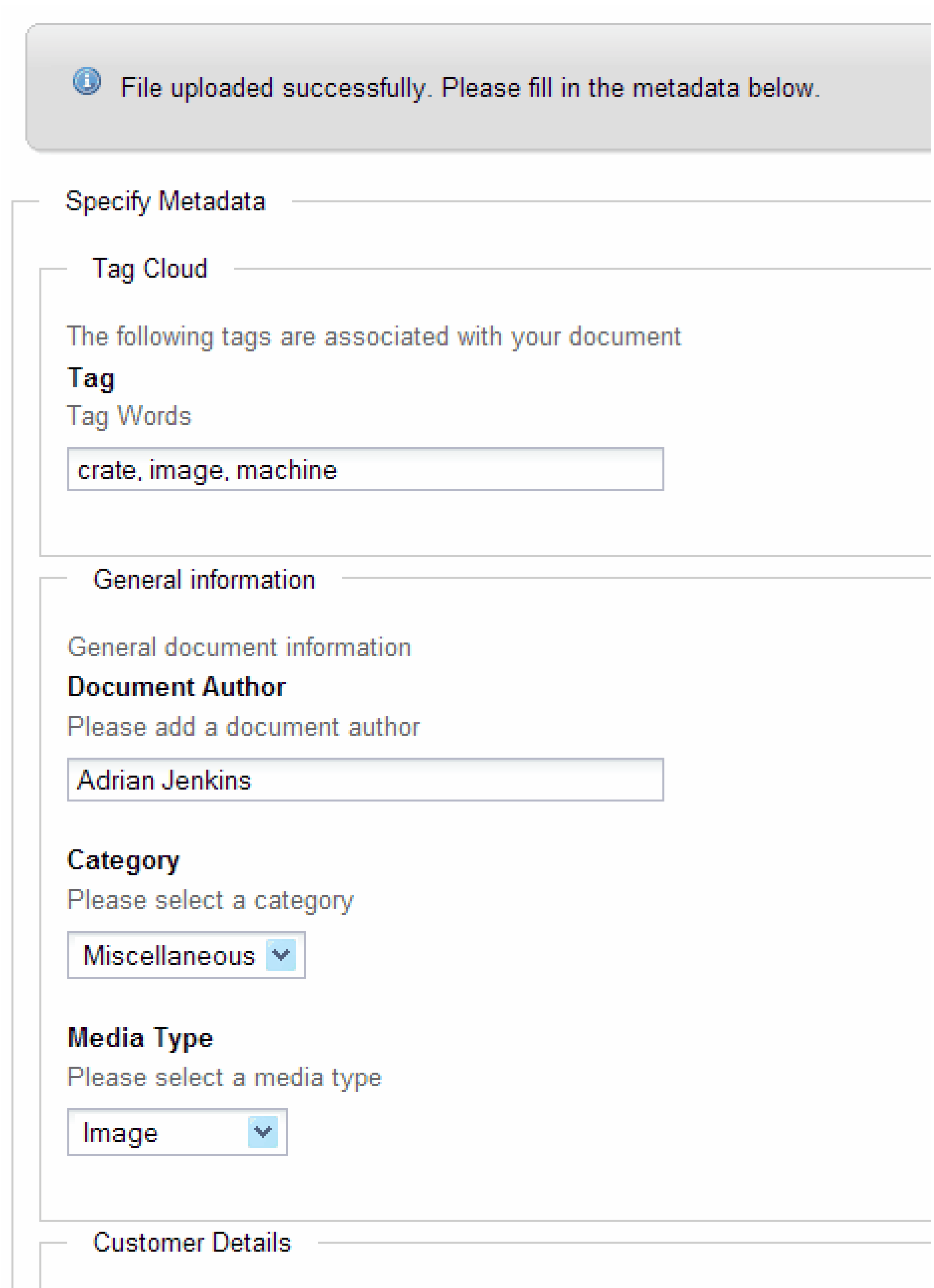
4. On the Add a document to .. page, in the File field, specify the path the document you're uploading, or click *Browse* to navigate to the document on your local environment.

5. Accept the auto-populated Document Title or define a title; then, select a document type.

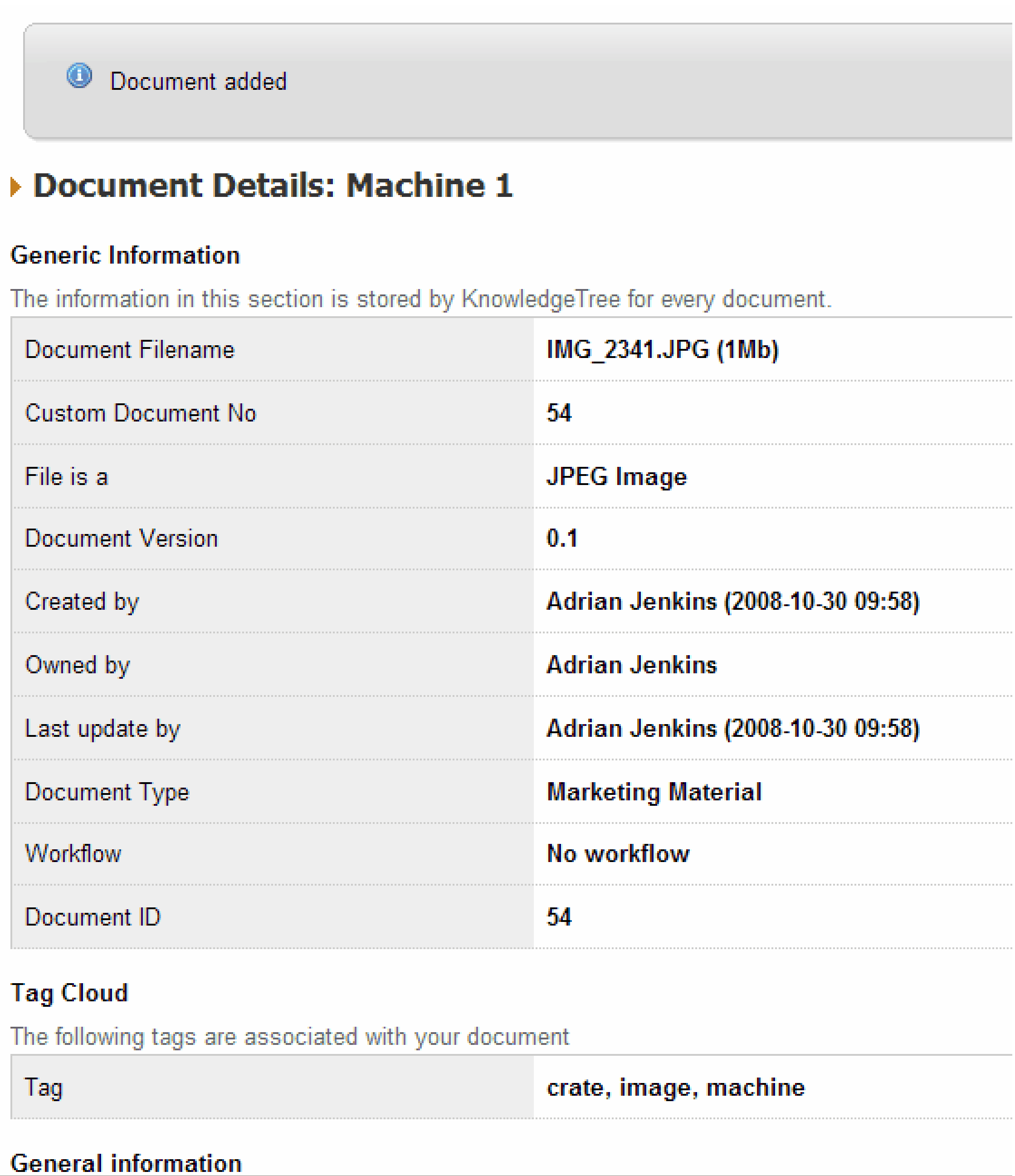
6. When you're done, click *Add* to upload the document.



7. A system message informs you that the file has uploaded successfully; now, fill out the document metadata.
Note: The system administrator predefines the metadata fields per document type.



8. When you're done, click *Save Document*.
   Note: The Document Details page opens, where you can view the data you entered for this document.



4.3.3.2 Viewing Document Details

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.

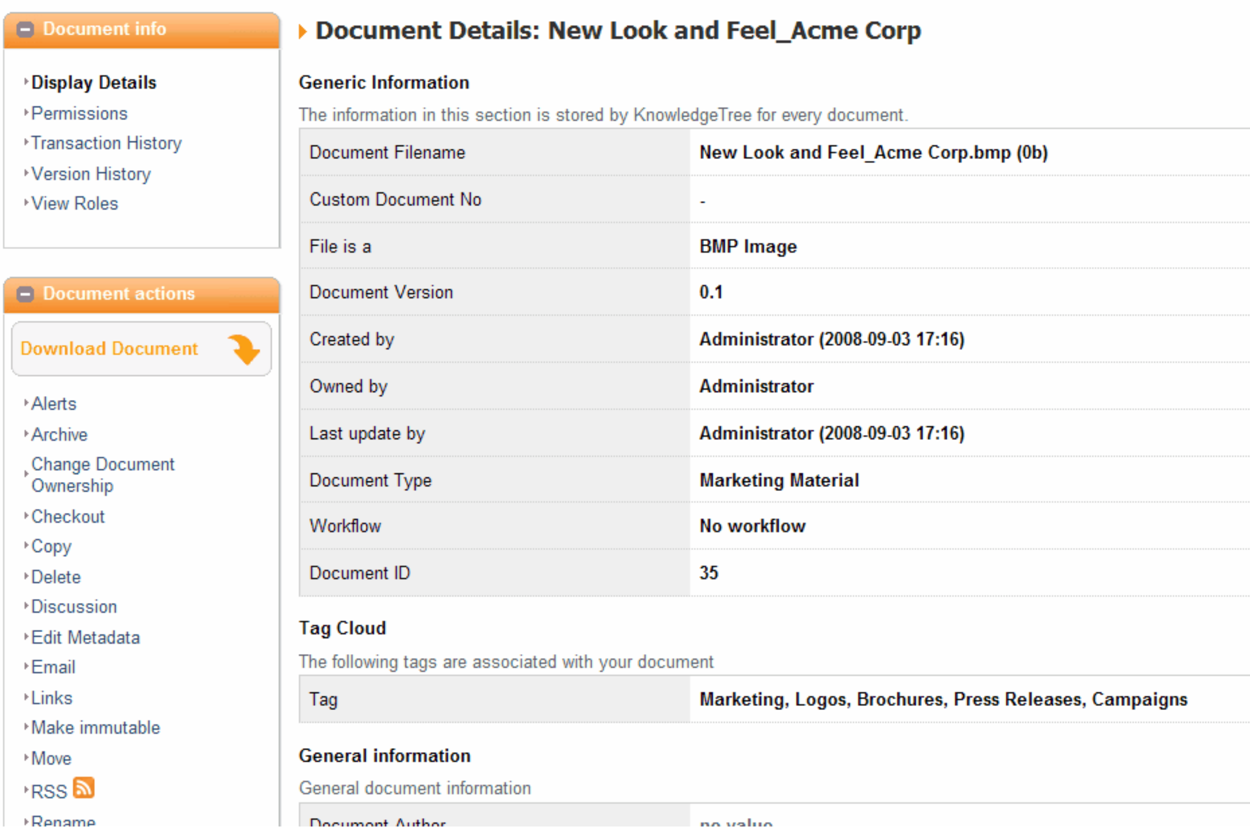
2. Having located the document, click on the document in the folder view to open the document's Document Details page.

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.



4.3.3.3 Viewing Property Preview

This procedure displays the properties of the currently selected document in a Property Preview panel.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, locate the document where you need to preview properties - search for the document, or navigate to the document through the folder structure in Browse Documents.

2. Locate the Property Preview icon for the document on which you wish to view the property preview; then, click on the icon to display the document properties in a new window.

Property Preview Info Panel

4.3.3.4 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 actions menu (located on the top left of the page), click *Download Document*.

4.3.3.5 Viewing Document Permissions

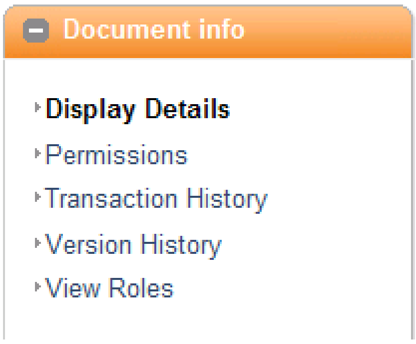
This procedure displays the current permissions set up on a currently selected document.

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.

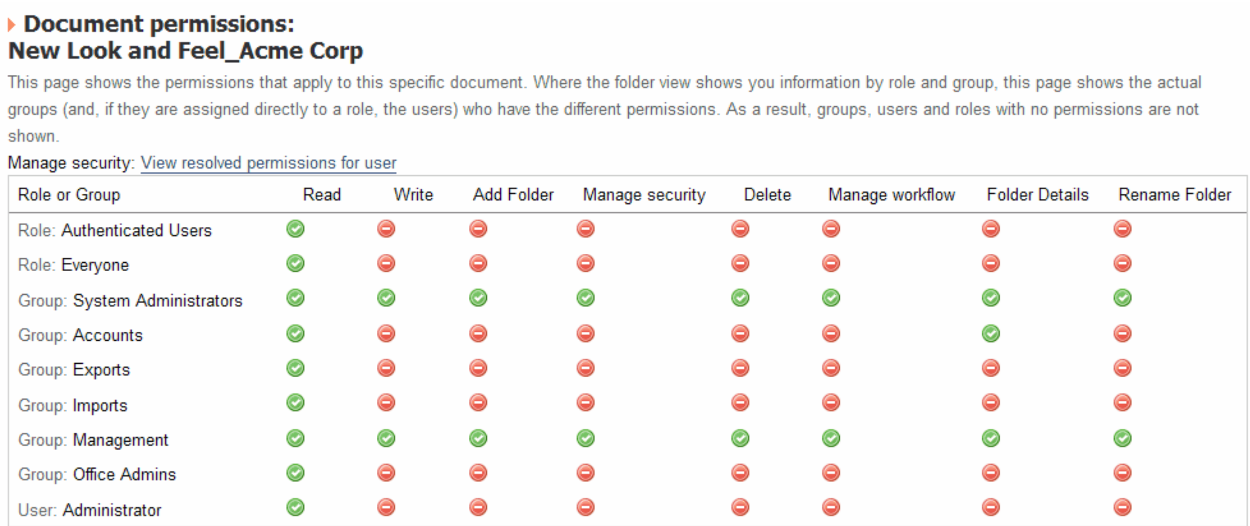
Perform the following steps:

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.



Document permissions:
New Look and Feel_Acme Corp

This page shows the permissions that apply to this specific document. Where the folder view shows you information by role and group, this page shows the actual groups (and, if they are assigned directly to a role, the users) who have the different permissions. As a result, groups, users and roles with no permissions are not shown.

Manage security: View resolved permissions for user

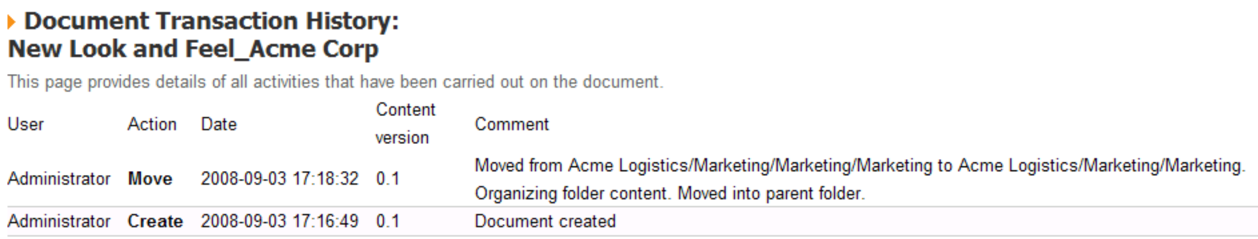
Role or Group	Read	Write	Add Folder	Manage security	Delete	Manage workflow	Folder Details	Rename Folder
Role: Authenticated Users	✓	✗	✗	✗	✗	✗	✗	✗
Role: Everyone	✓	✗	✗	✗	✗	✗	✗	✗
Group: System Administrators	✓	✓	✓	✓	✓	✓	✓	✓
Group: Accounts	✓	✗	✗	✗	✗	✗	✓	✗
Group: Exports	✓	✗	✗	✗	✗	✗	✗	✗
Group: Imports	✓	✗	✗	✗	✗	✗	✗	✗
Group: Management	✓	✓	✓	✓	✓	✓	✓	✓
Group: Office Admins	✓	✗	✗	✗	✗	✗	✗	✗
User: Administrator	✓	✗	✗	✗	✗	✗	✗	✗

4.3.3.6 Viewing 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.



Document Transaction History:
New Look and Feel_Acme Corp

This page provides details of all activities that have been carried out on the document.

User	Action	Date	Content version	Comment
Administrator	**Move**	2008-09-03 17:18:32	0.1	Moved from Acme Logistics/Marketing/Marketing/Marketing to Acme Logistics/Marketing/Marketing. Organizing folder content. Moved into parent folder.
Administrator	**Create**	2008-09-03 17:16:49	0.1	Document created

4.3.3.7 Viewing Roles

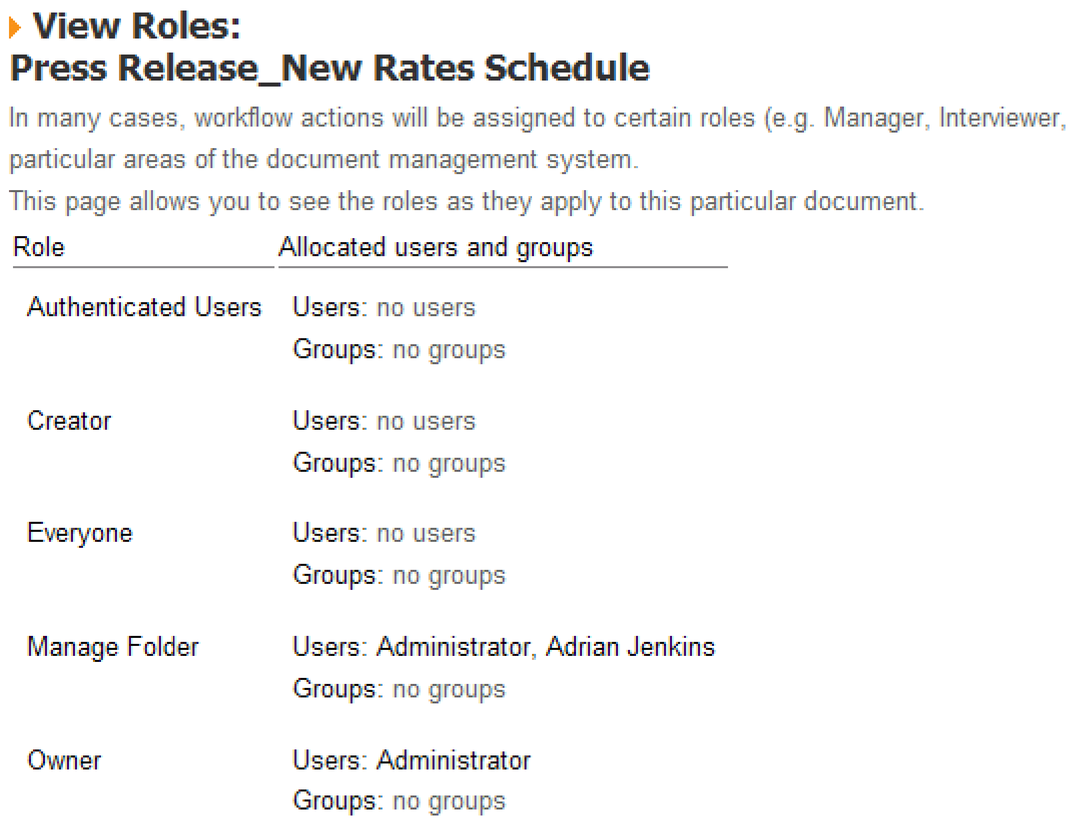
This procedure displays current role allocations on the selected document.

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.



View Roles:
Press Release_New Rates Schedule

In many cases, workflow actions will be assigned to certain roles (e.g. Manager, Interviewer,
particular areas of the document management system.
This page allows you to see the roles as they apply to this particular document.

Role	Allocated users and groups
Authenticated Users	Users: no users Groups: no groups
Creator	Users: no users Groups: no groups
Everyone	Users: no users Groups: no groups
Manage Folder	Users: Administrator, Adrian Jenkins Groups: no groups
Owner	Users: Administrator Groups: no groups

4.3.3.8 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*.

4.3.3.9 Archiving Documents

This procedure archives a currently selected document.

Archiving clears up space in KnowledgeTree to speed up search and indexing, and hides the document from the folder view in Browse Documents.

⊟ How do I find an archived document and get it restored?
You may locate an archive document by entering the document ID in the Go to Document ID dashlet on the dashboard; then, you can send a online request, through KnowledgeTree to the system administrator, requesting de-archival of the document, if required. The administrator receives de-archival requests via email and through a notice in the Items Requiring Your Attention dashlet.

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.

4.3.3.10 Configuring Alerts

This procedure displays, edits, and deletes existing document alerts, and adds new document alerts on a currently selected document.

Commercial Editions Only

Note: This feature is only available in KnowledgeTree Commercial Editions.

Note: Adding an alert allows the system to notify the creator of the alert, other users that may be included in the alert, when action is due on the document. Users included in the alert receive an email and a dashboard notification when the alert is triggered.

Perform the following steps:

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

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

3. Do you want to ...
   - view existing alerts on this document? In the Existing Alerts section on the page, view existing alerts displayed on the page.

   - edit an alert on this document? In the Existing Alerts section on the page, click the *Edit* icon for the relevant alert. Make the required changes; then, click *Save*.

   - delete an alert on this document? In the Existing Alerts section on the page, click the *Delete* icon for the relevant alert.

   - add an alert on this document? Go to step 4.

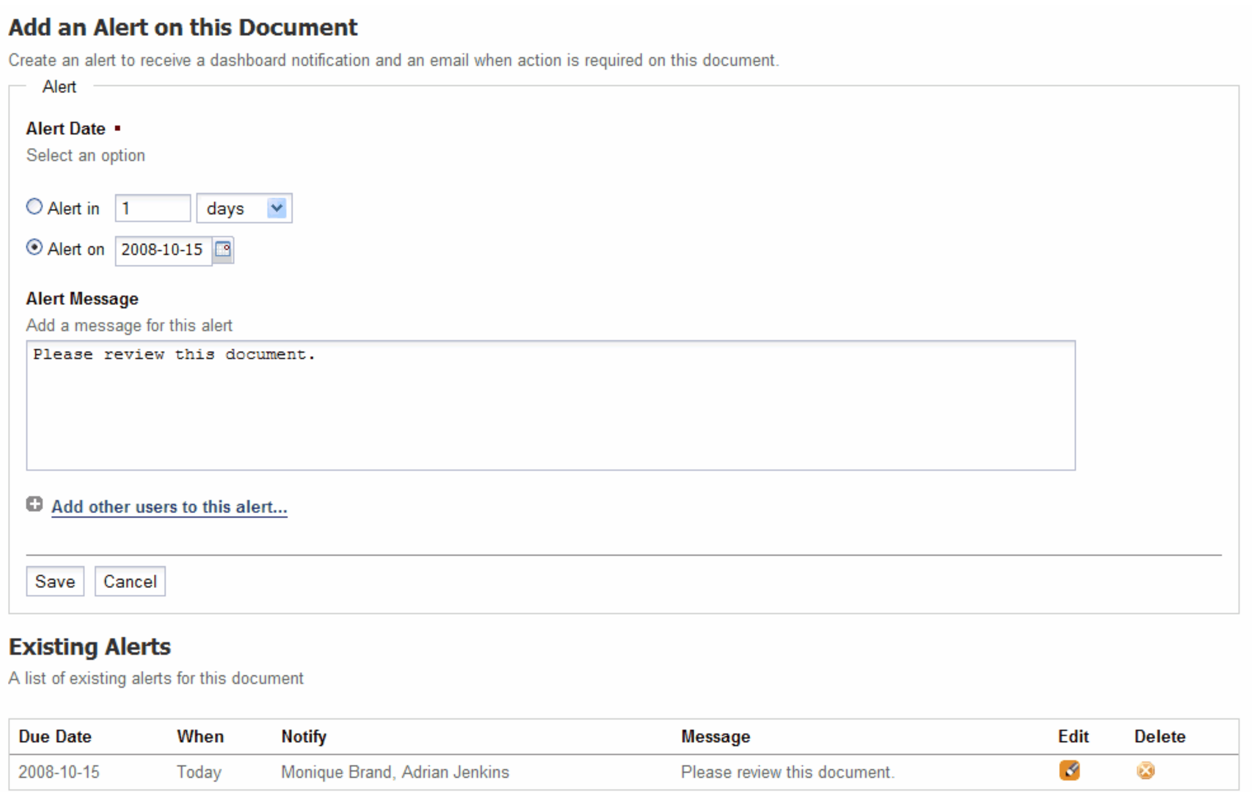
4. To add a document alert:

4.1. In the Alert Date section, define an alert date - define a number of days until this alert is active, or select a calendar date.

4.2. In the Alert Message section, add a message to attach to this alert, if required.

4.3. To add other users as recipients of this alert, click *Add other users to this alert ...; then, select the relevant users.*

4.4. Click *Save*.



4.3.3.11 Checking out Documents

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 KnowledgeTree. 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*.

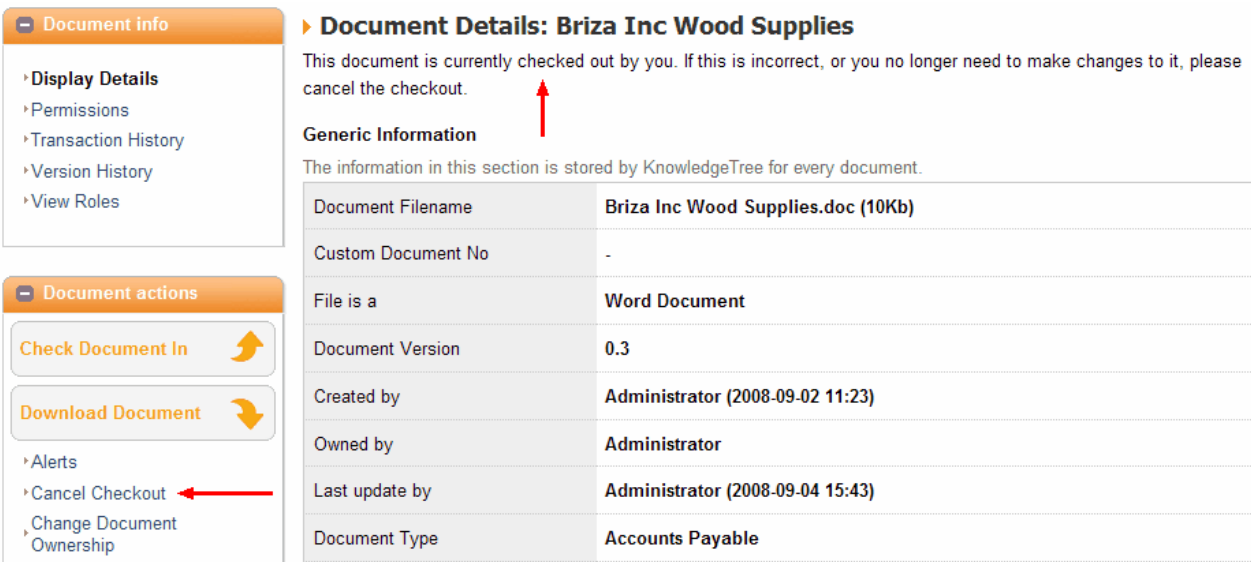
4.3.3.12 Canceling Checked Out Documents

This procedure cancels the checked out status of a document and restores the document to KnowledgeTree to the version in KnowledgeTree before check out (i.e. the document version is not updated).

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 *Cancel Checkout.*



4.3.3.13 Checking-in Documents

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 de-selected.

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 de-selected.

7. Click *Check-in* to upload the document.

4.3.3.14 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.

4.3.3.15 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.

4.3.3.16 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.

⊟ What are discussion threads?
Discussion threads are a collaboration tool that provide 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*.

4.3.3.17 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.

4.3.3.18 Sending Emails

This procedure sends an email message, with an attachment or download link, to internal KnowledgeTree users, or to external users.

Notes:

- *The ability to email attachments, or to email external users must be enabled in your system for this functionality to display as options on the Email page.*

- *Internal (KnowledgeTree users) recipients of emails may click on the link in the email to go directly to the document in KnowledgeTree, and log in may be required. External recipients receive a unique, one-time, download link that provides view-only access only to the relevant document - thus, log in is not* *required for external users.*

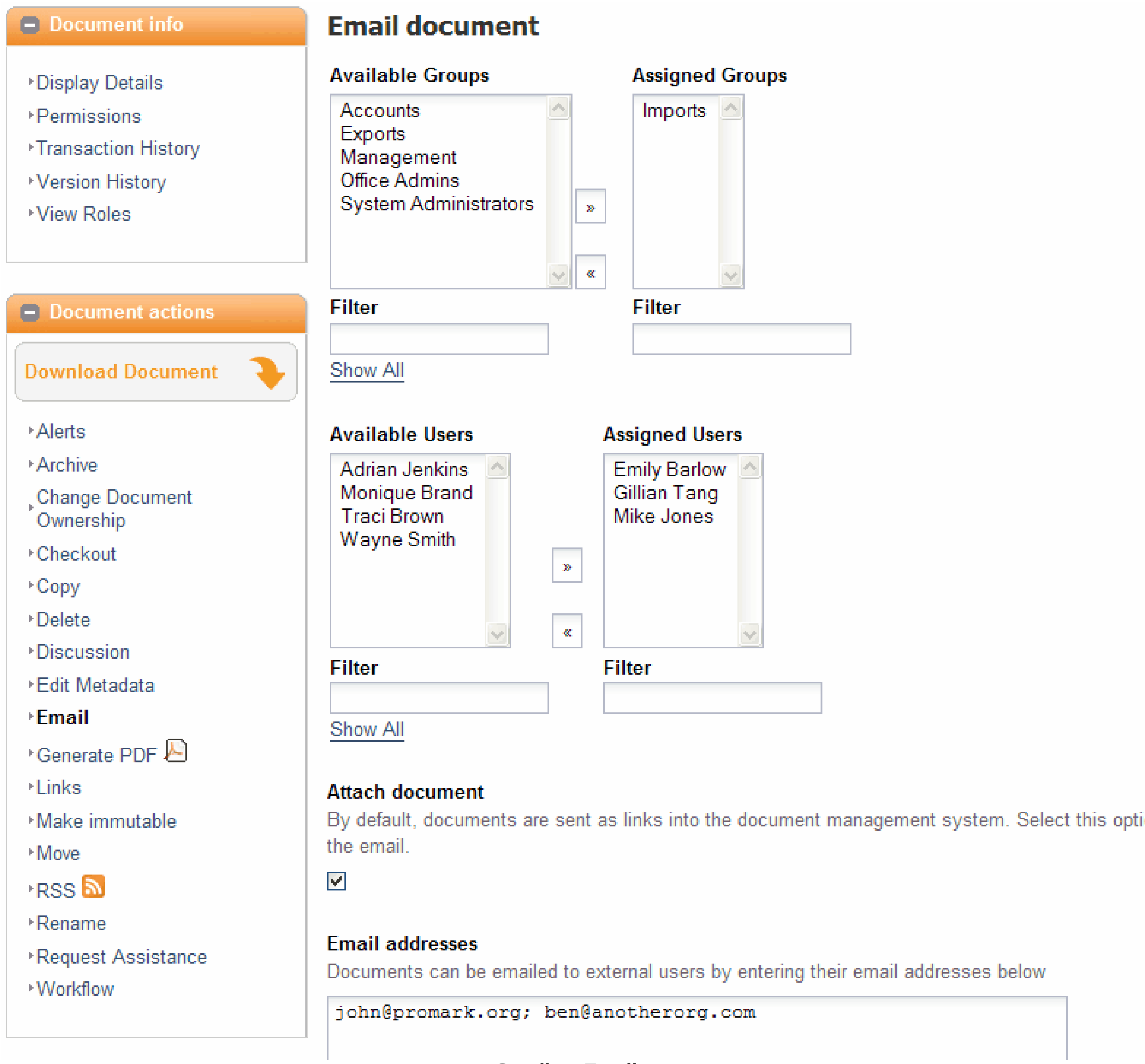
Perform the following steps:

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 email options:
   - select internal recipients (users and/or groups) - populate the Assigned Groups / Assigned Users columns.
   - define whether to send the document as an attachment; by default a document link is sent
     Note: This setting must be enabled for your system to display on this page.
   - define the email addresses of external users, if applicable
     Note: This setting must be enabled for your system to display on this page.

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



Sending Emails

4.3.3.19 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, and the document must be a supported file format for PDF Conversion in KnowledgeTree.

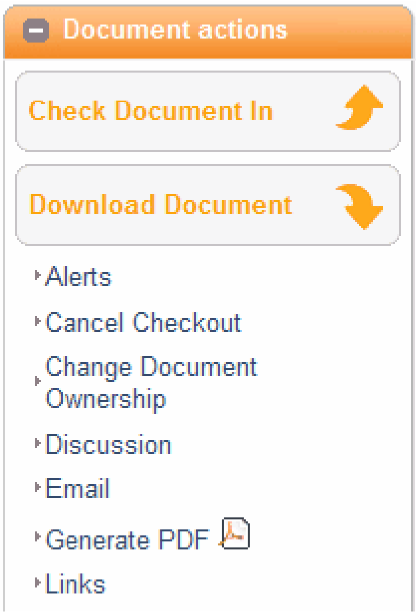
KnowledgeTree supports PDF conversion for the following file formats:
doc, ods, odt, ott, txt, rtf, sxw, stw, xml, pdb, psw, ods, ots, sxc, stc, dif, dbf, xls, xlt, slk, csv, pxl, odp, otp, sxi, sti, ppt, pot, sxd, odg, otg, std, asc

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:

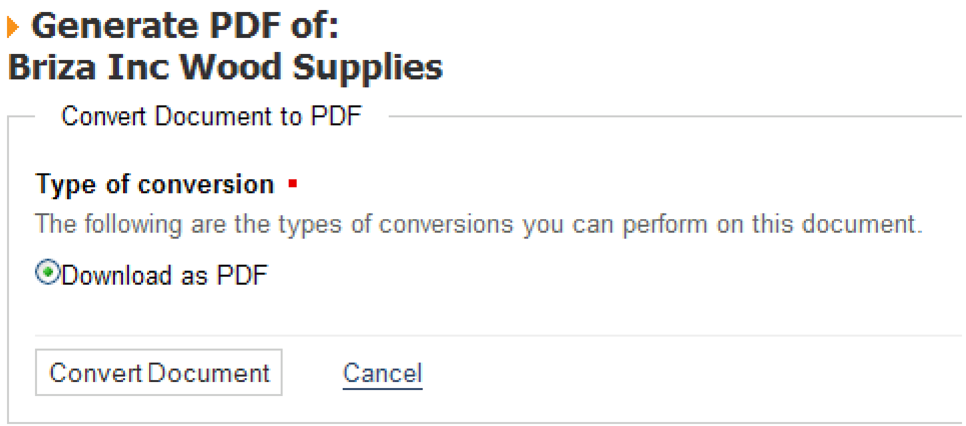
1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

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.



4.3.3.20 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.

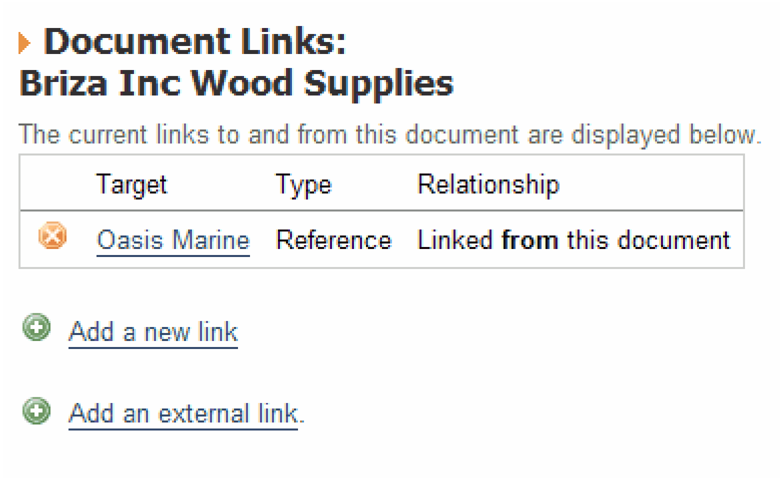
Perform the following steps:

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.



4.3.3.21 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.

4.3.3.22 Adding RSS Feeds

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

4.3.3.23 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 .jpeg to filename .bmp; then, checking out the .jpeg 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*.

4.3.3.24 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*.

4.3.3.25 Viewing Documents Inline

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

Commercial Editions Only
Note: This feature is only available in KnowledgeTree Commercial Editions.

Only files of a supported file type can be viewed inline
Note: Currently (October 2008) the Inline View plugin supports only the following file types:

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

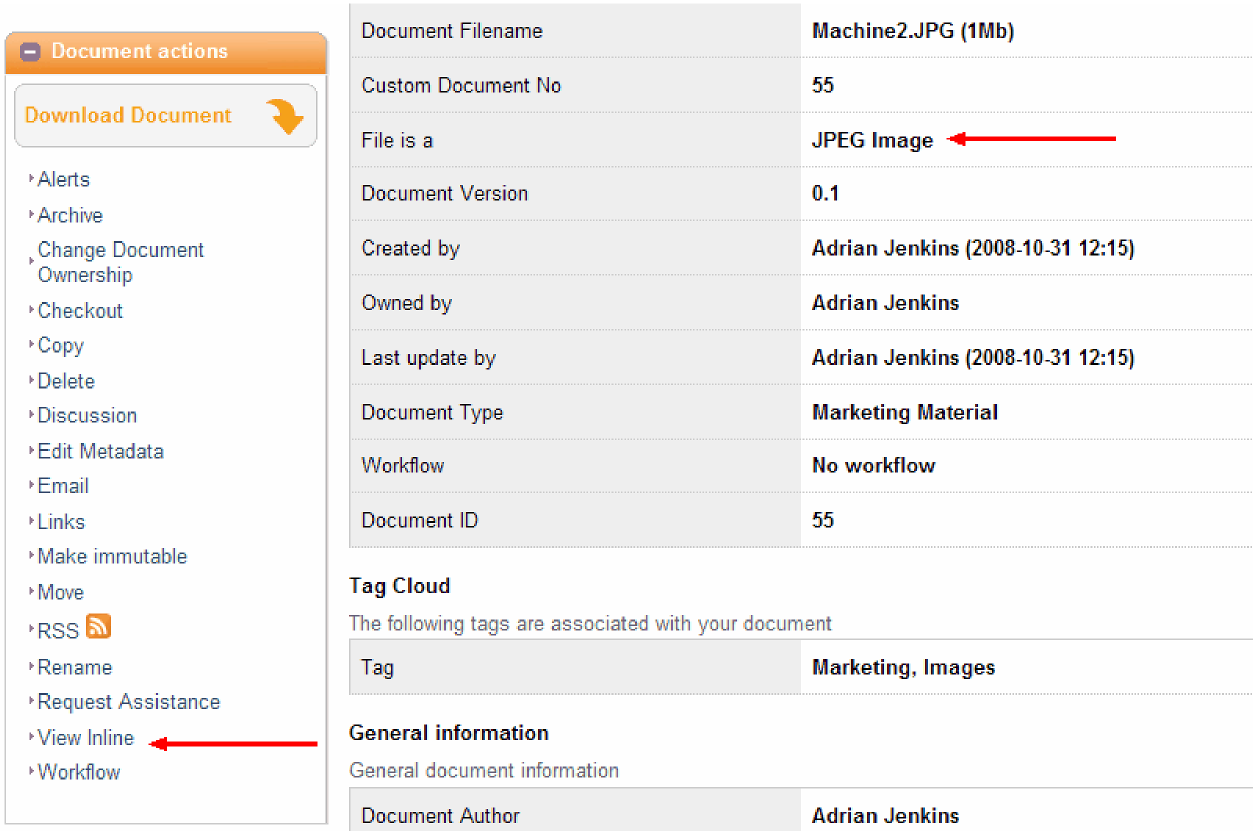
Support for other file types is reserved for future development. To preview other file types, you may convert the document to PDF; then, download the document to view it.

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: Inline View is only available for the supported file types, and you must have the Inline View plugin enabled to have access to this functionality.

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



Inline View of supported file types

View Inline

4.3.3.26 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.

Pre-requisite:

- The document type of the document you're working with must be able to use the workflows added to the system or the workflow option will not display as a document action.

Perform the following steps:

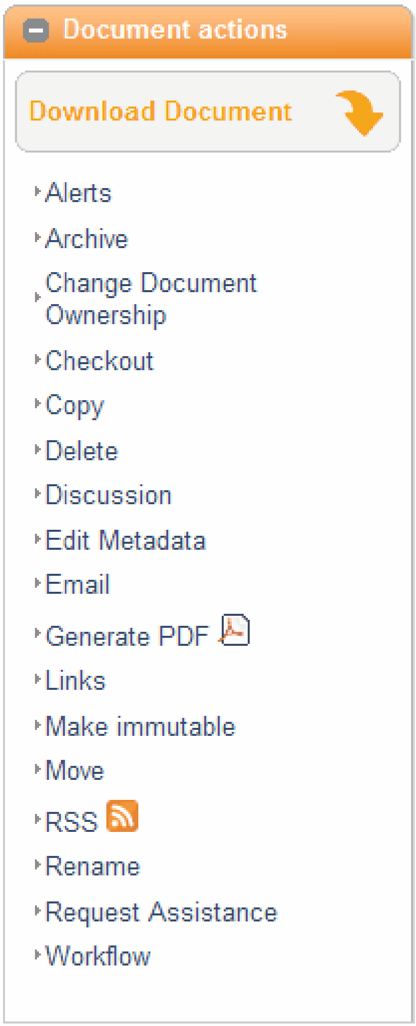
1. Log in to KnowledgeTree's web interface; then, open the Document Details page of the document where you want to view or start a workflow.

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

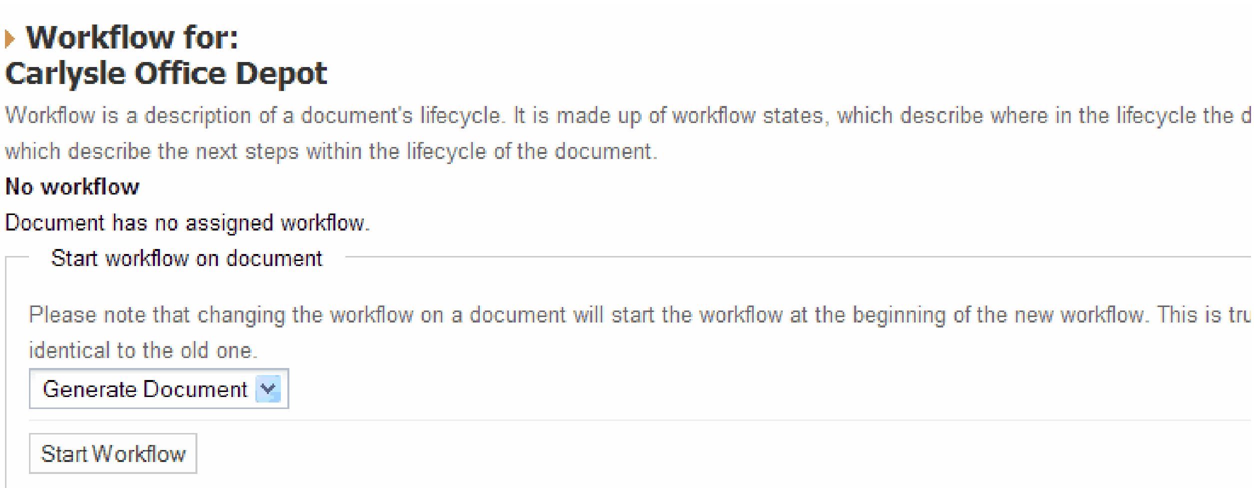
3. Do you want to ...
   - view a current workflow? View settings for the workflow (if assigned) on the page.

   - 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.

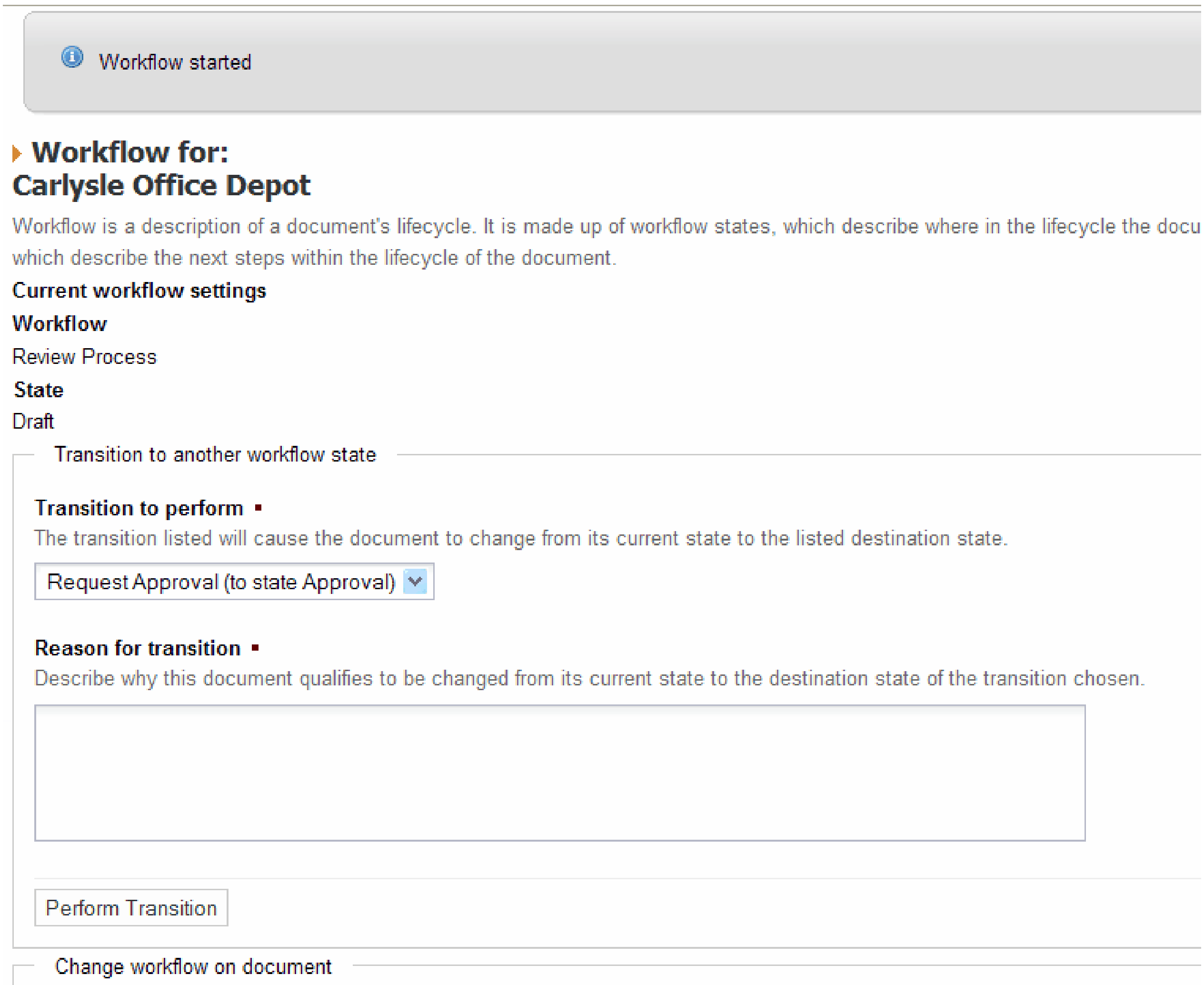
   - start a workflow? Select a predefined workflow from the drop down menu; then, click *Start Workflow*.



Workflow document action



Start Workflow



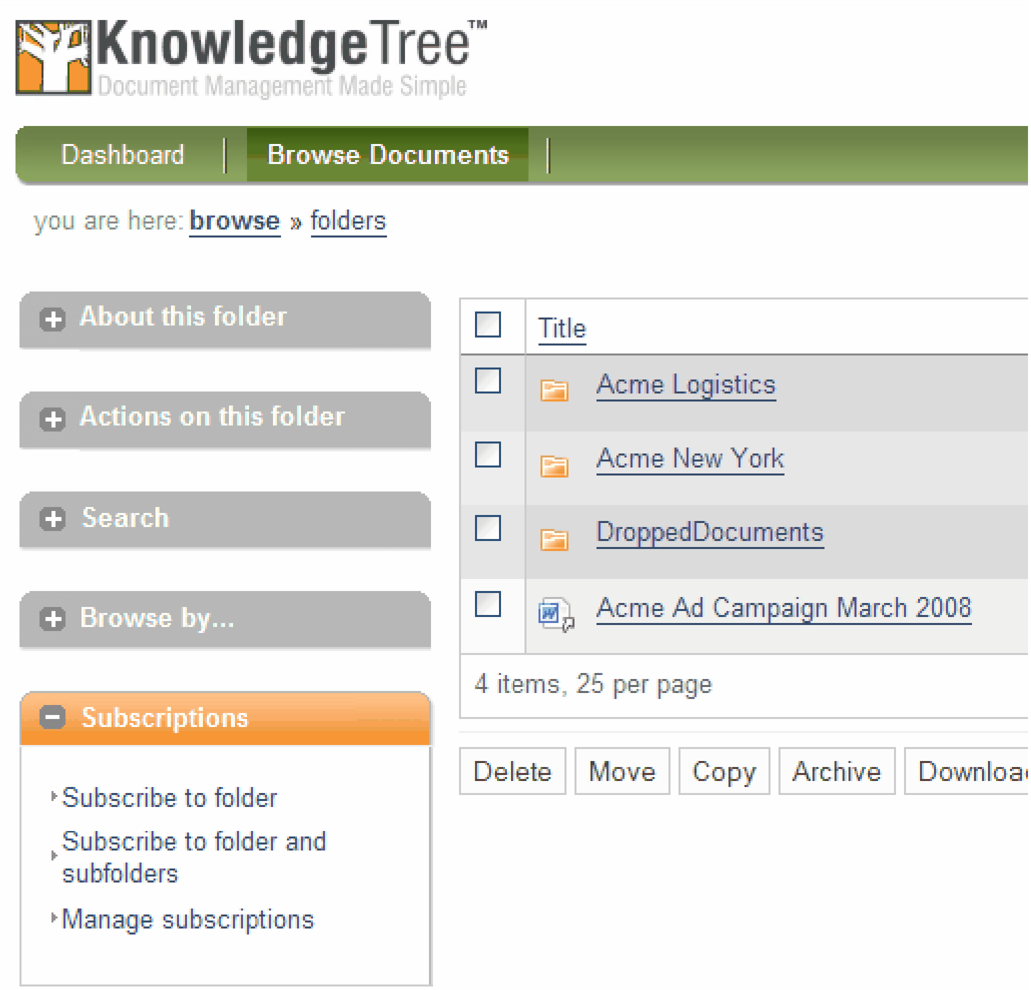
Workflow started

4.3.3.27 Using Subscriptions

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

- What are 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.



Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, click *Browse Documents* to enter the folder structure. The Subscriptions menu displays at the bottom left of the page in Browse Documents.

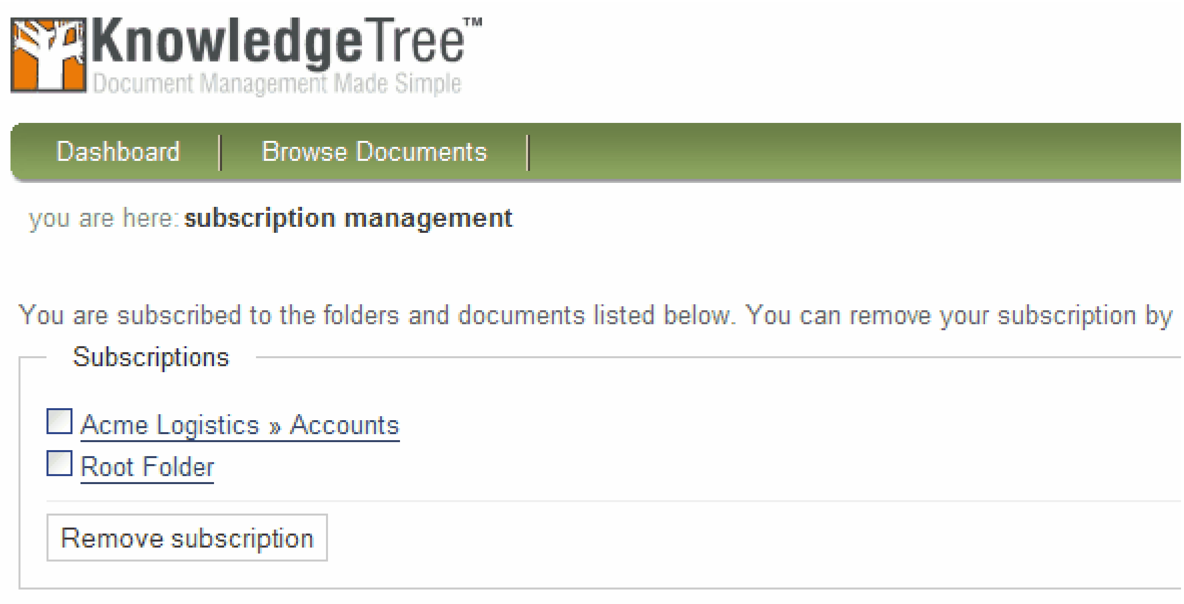
2. Do you want to ...

   - view subscriptions currently set up for your user profile? In Browse Documents, locate the Subscriptions menu; then, expand the menu (click +). 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, expand the Subscriptions menu. 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. Expand the Subscriptions 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. In the Subscriptions menu, click *Unsubscribe ...folder/document*.
  Alternative step: In the Subscriptions menu, click Manage subscriptions. On the Subscription Management page, view all your current subscriptions - the full path to your subscriptions display. Select relevant check boxes; then, click Remove subscription.

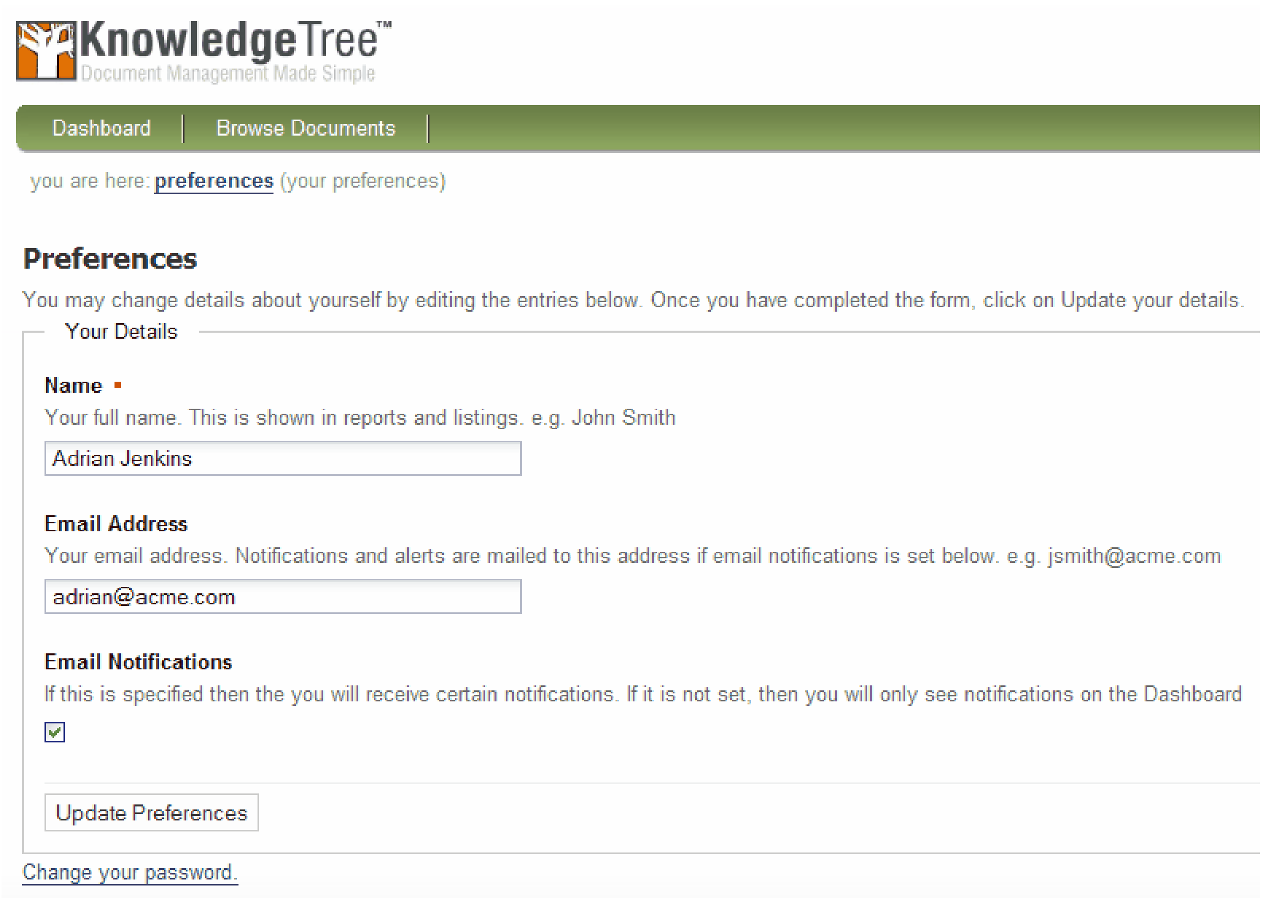


Manage Subscriptions

4.4 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



4.4.1 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.

4.4.2 Changing Passwords

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

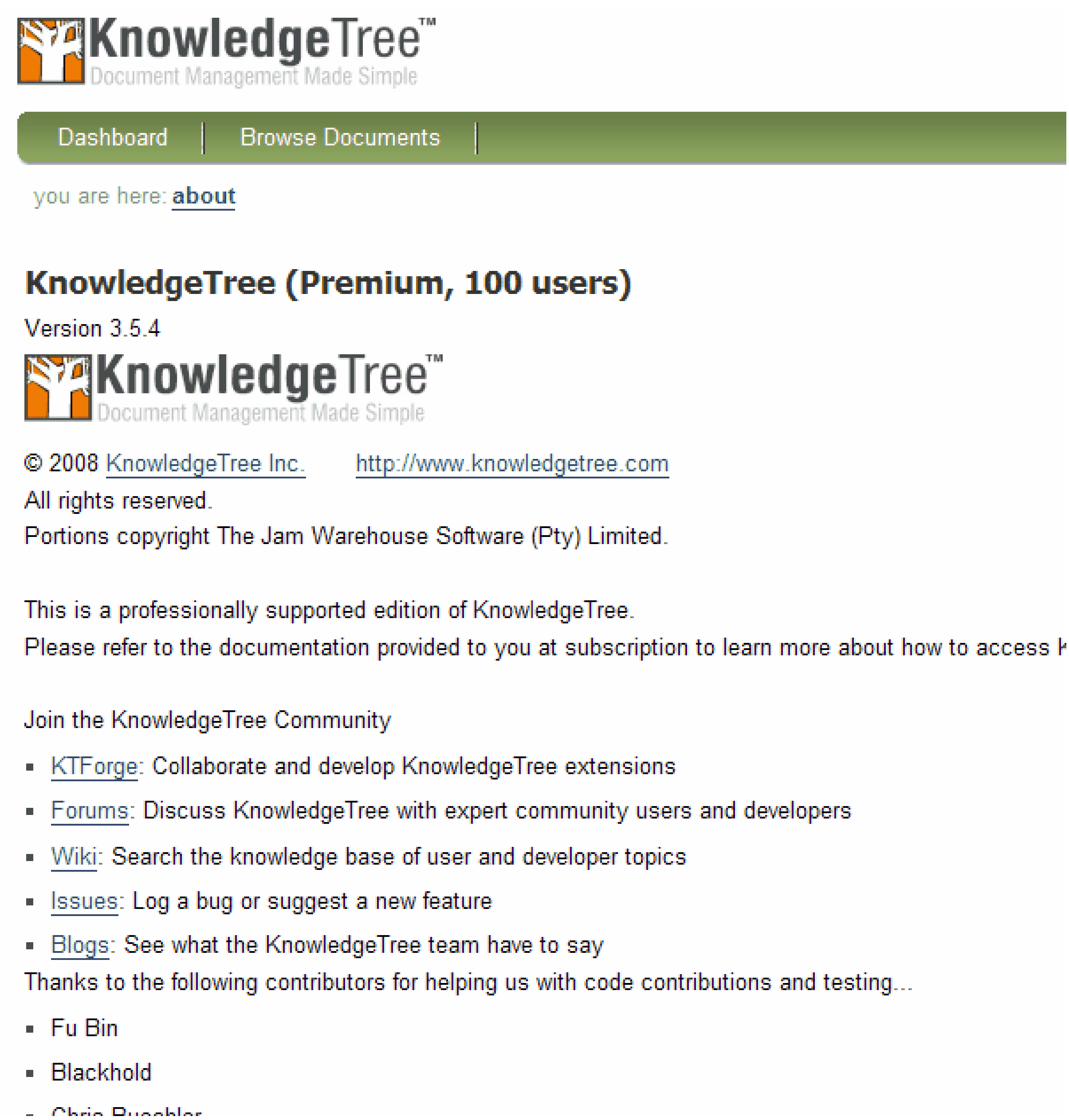
Perform the following steps:

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*.

4.5 About

The About tab displays the following information:

- Copyright notice
- 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


KnowledgeTree™
Document Management Made Simple
Dashboard
Browse Documents
you are here: about
KnowledgeTree (Premium, 100 users)
Version 3.5.4
KnowledgeTree™
Document Management Made Simple
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Join the KnowledgeTree Community
KTForge: Collaborate and develop KnowledgeTree extensions
Forums: Discuss KnowledgeTree with expert community users and developers
Wiki: Search the knowledge base of user and developer topics
Issues: Log a bug or suggest a new feature
Blogs: See what the KnowledgeTree team have to say
Thanks to the following contributors for helping us with code contributions and testing...
Fu Bin
Blackhold

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