Research Knowledge Manager Instructional Manual

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Introduction

Introduction to the Research Knowledge Manager

Welcome to the Research Knowledge Manager!

The Research Knowledge Manager assists with managing a file database. With the Research Knowledge Manager, you can associate tags with files and perform search results on the tags. The rest of this document describes various components of the Research Knowledge Manager.
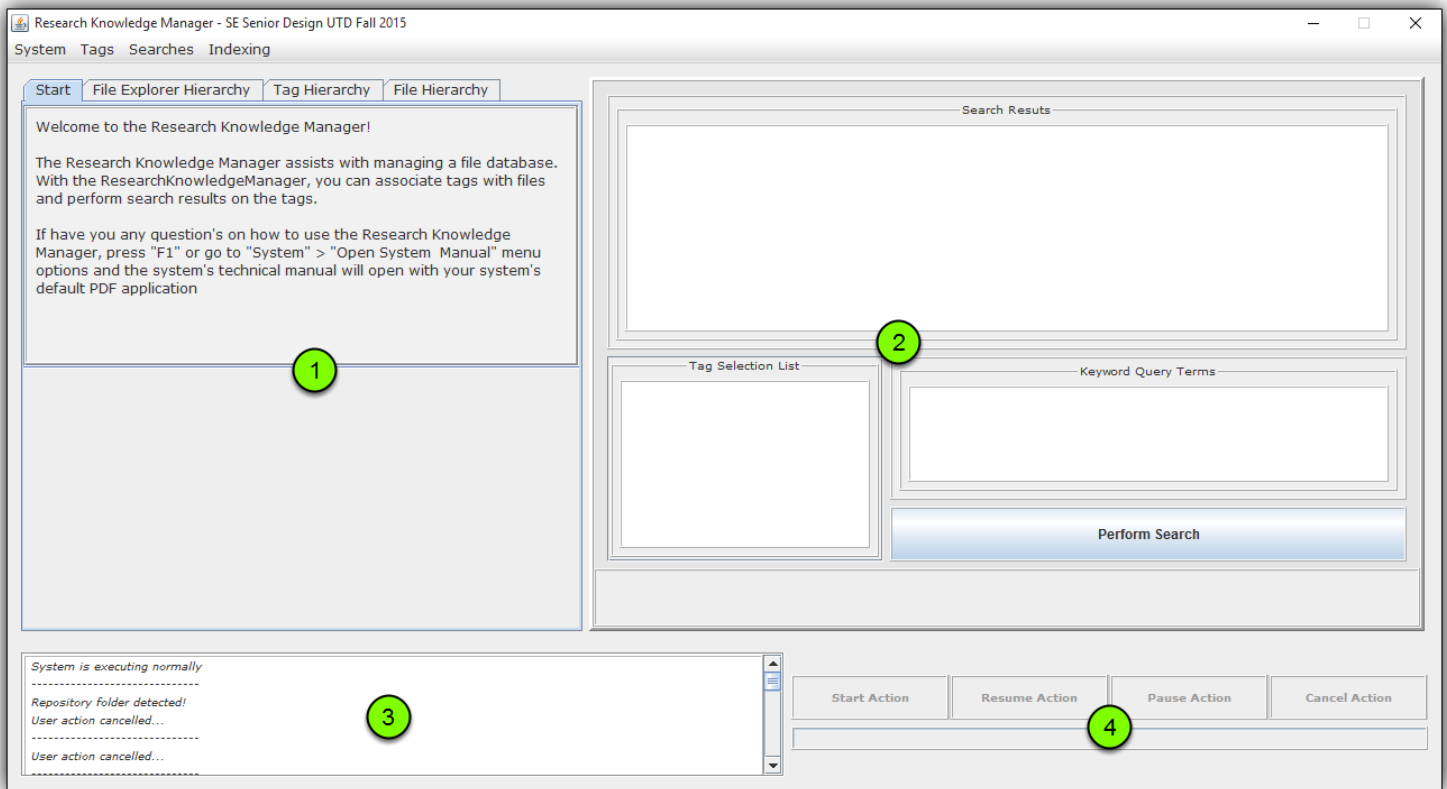
Note - This document frequently mentions "adding files to a tag" and "adding tags to a file". These actions are effectively the same; associating a file and a tag with each other. One method generally associates many tags to one file while the other method associates many files with one tag.

Note - Many features of this document rely on selecting multiple items/elements in a list or tree. This multiple selection can be done by holding "Shift" when selecting items or by holding "Control" when selecting items.

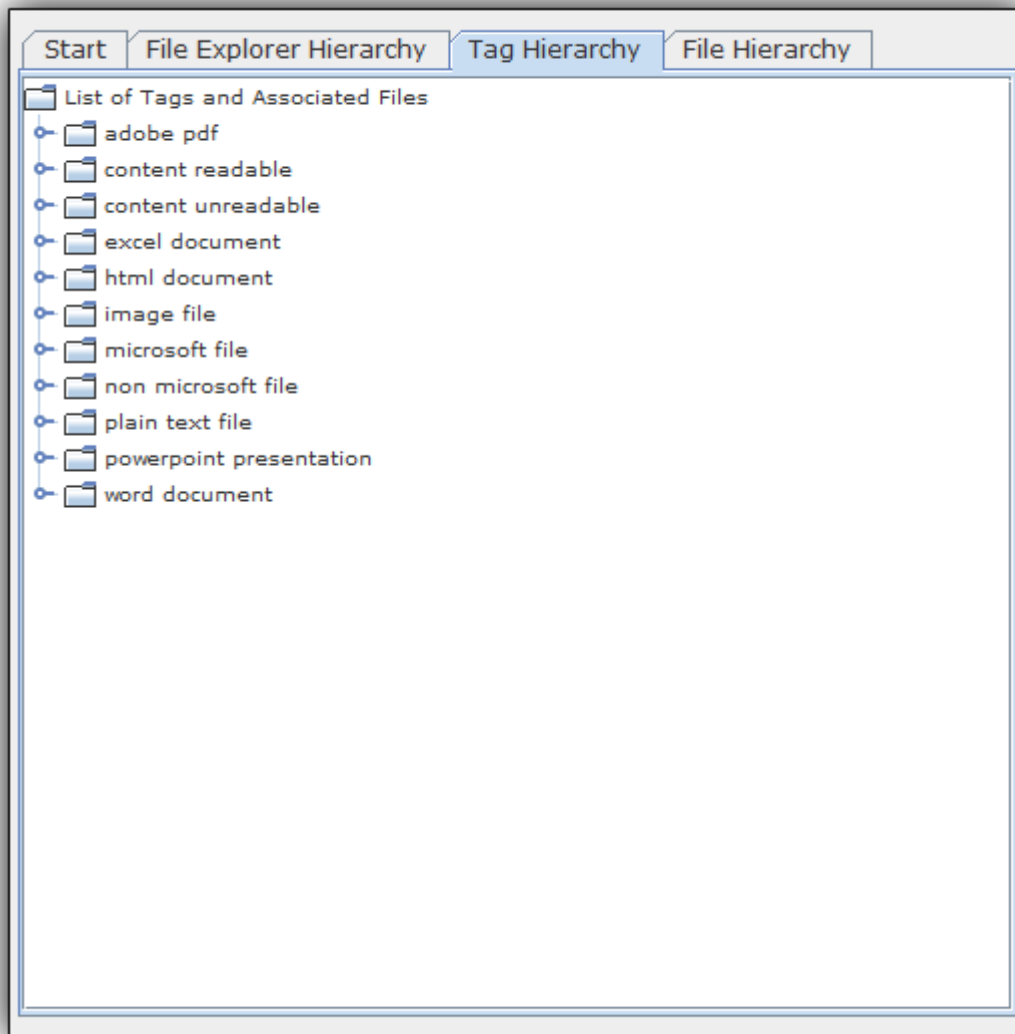# The Sections of the Research Knowledge Manager

Section Overview

This section describes the various sections of the Research Knowledge Manager

The Research Knowledge Manager's User Interface is broken down into four sections each listed and described below.

1.   Hierarchy Pane
2.   Search Pane
3.   Status Message Pane
4.   Task Pane

Hierarchy Pane

The Hierarchy Pane provides the user with a view of various hierarchies within the system. Each hierarchy is described below.

File Explorer Hierarchy - This tab displays s a hierarchy of the repository folder loaded by the system. This hierarchy reflects what might be shown in Windows Explorer.

Tag Hierarchy - This tab displays a hierarchy of files associated with a tag. Specifically, the user can easily see the list of files associated with a given tag.

File Hierarchy - This tab displays a hierarchy of tags associated with a file. Specifically, the user can easily see the list of tags associated with a given file.

Depending on the items selected in the Tag Hierarchy and File Hierarchy, different context actions will appear in the search pane.

Note - The Tag Hierarchy and File Hierarchy tabs contain sorted trees allowing the user to quickly find any item needed.
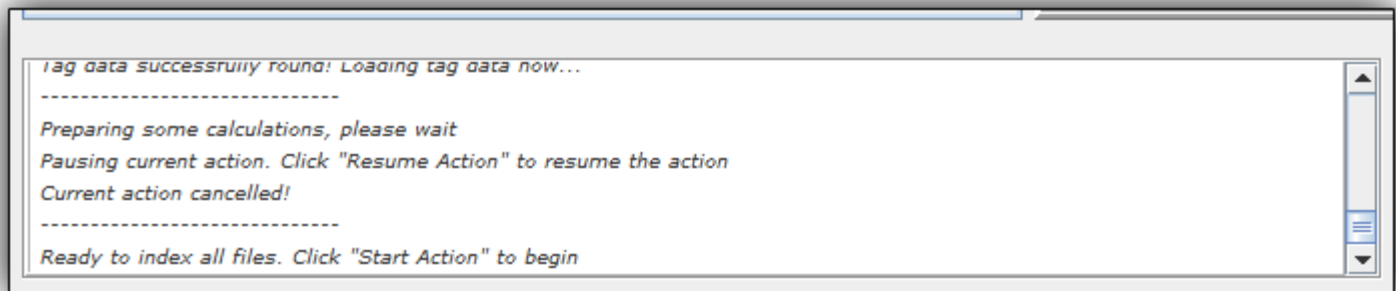
Search Pane

The Search Pane is where the user can perform various tag-based and keyword-based searches on the system. Searches are initiated by selecting tags listed in the Tag Selection List and pressing Perform Search. The system will then list files that contain **all of the selected tags** in the Search Results list. Additionally, the user can perform actions on these resulting files by selecting files and right-clicking within the Search Results list.

The user can manipulate tags associations and file associations by clicking various buttons at the bottom of the Search Pane. Which button appear depend on the items selected in the Hierarchy Pane. More information can be found in in "User How-Tos" section.

Note - The Research Knowledge Manager currently cannot perform keyword based searches so the Keyword Query Terms text field and Modify Tag Keywords button are always disabled.
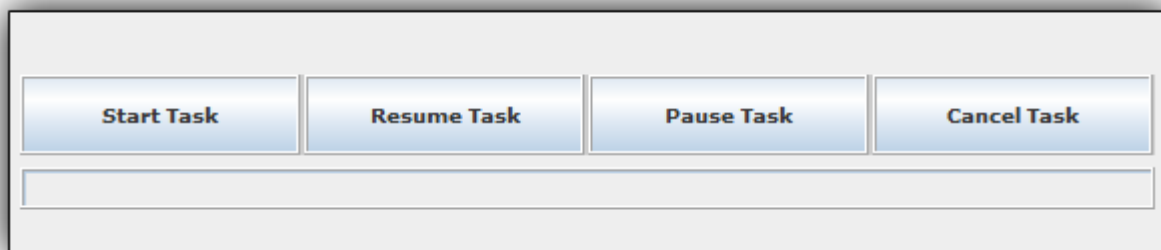
Status Message Pane

When the user interacts with the Research Knowledge Manager, the system reacts by providing messages on what the system is doing and any errors/problems encountered. This pane stores these messages generated by system.

When focused, the latest message can be removed by pressing "Backspace"
When focused, the entire message log can be cleared by pressing "Delete"

Task Pane

Some features of the Research Knowledge Manager, such as file indexing, may require need substantial time to complete. The task pane provides control over the when tasks are executing. The task completion progress is reflected in a progress bar located below the various task buttons.

 The following steps occur when the user selects a task.
1.   The system prepares for the task. A message will be sent to the Status

Message Pane when the task is ready to start.

2. The user starts the task by clicking Start Task
3. At any point the task is executing, the user can pause the task via Pause Task
4. Paused tasks can resumed at any point by clicking Resume Task
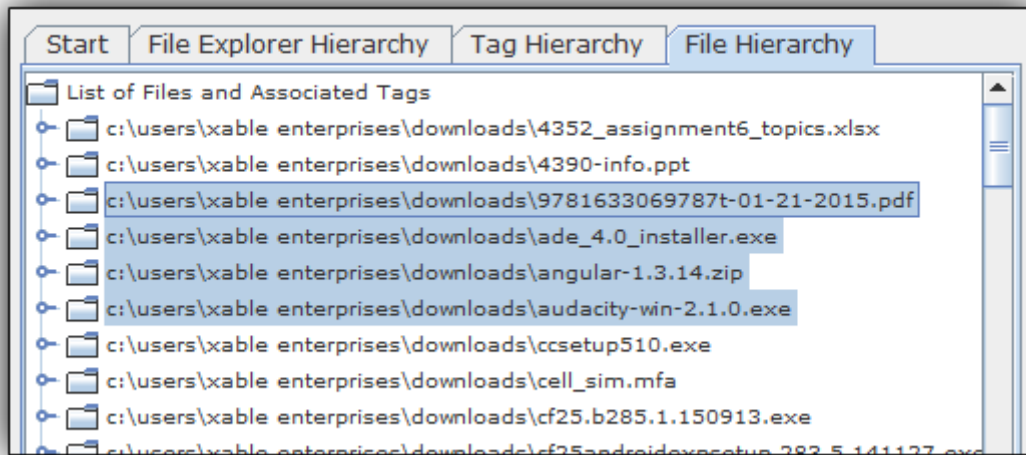5. At any point, a task may be canceled by pressing Cancel Task.

The following features are tasks which can be paused, resumed, and canceled:
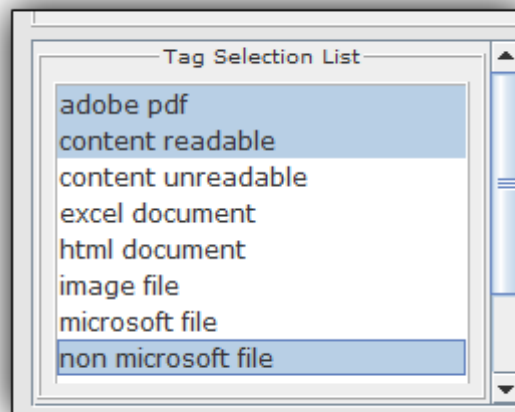- **Index all files**
- **Index new files**

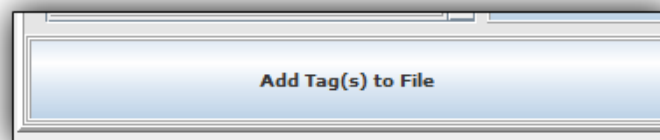# User How-Tos

How to Add Tags to Files - Method A

This section describes one method of adding tags to files

1. Select a set of files in the File Hierarchy tab
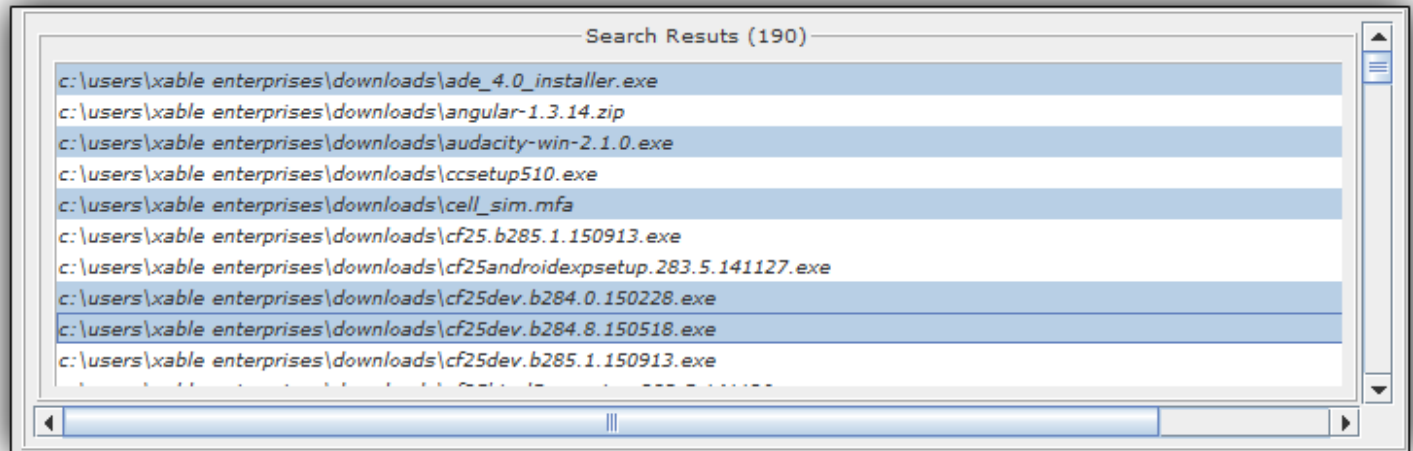

2. Select some tags in the Tag Selection List

3. Click Add Tag(s) to File. This will add the selected tags in the Tag Selection List to every file selected in the File Hierarchy.

How to Add Tags to Files - Method B

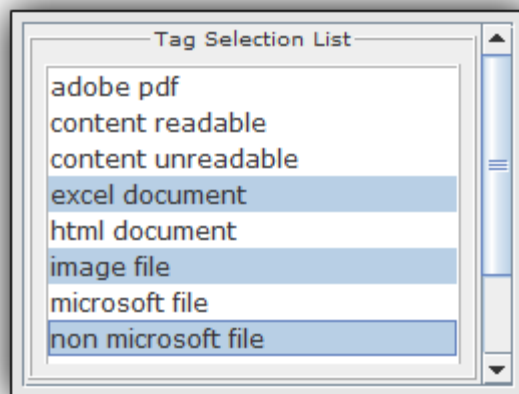This section describes another method of adding tags to files

Select Files in the Search Results

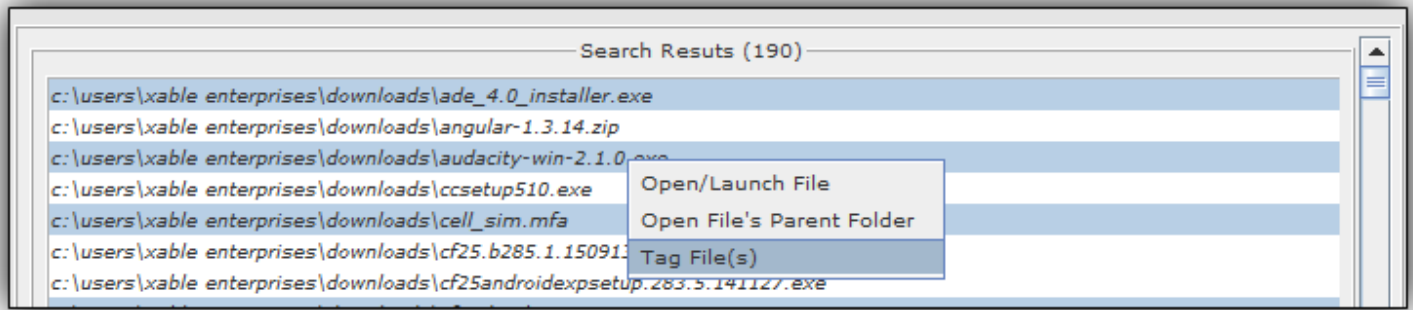

1. Select files in the Search Results list

Note - You may need to perform a search before files appear in the search result list

Select Tags in the Tag Selection List

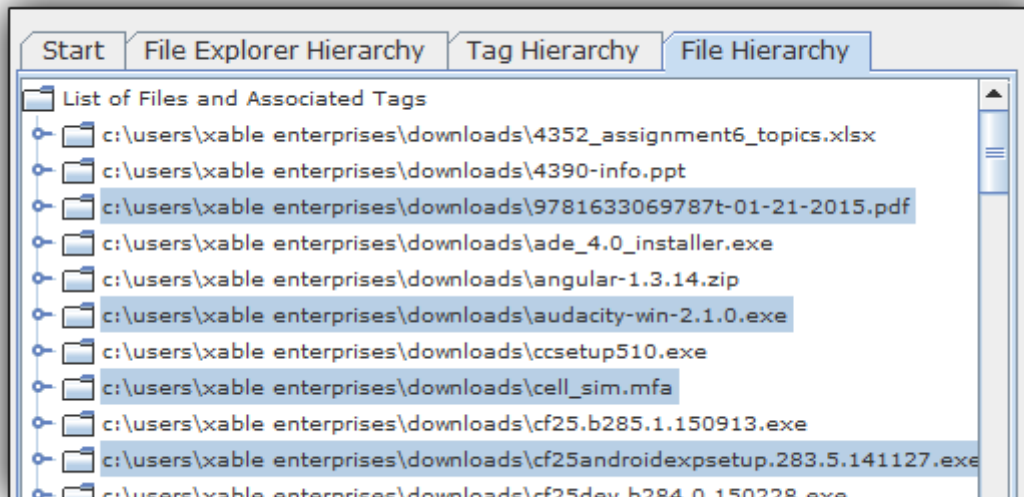2. Select some tags in the Tag Selection List

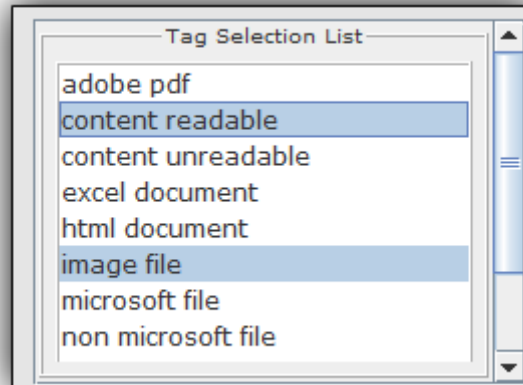# Right Click in Search Results and Click Tag File(s)

Click "Tag Files(s)" after right clicking in the Search Results list. All tags chosen in the Tag Selection list will be added to every selected file in the search results.
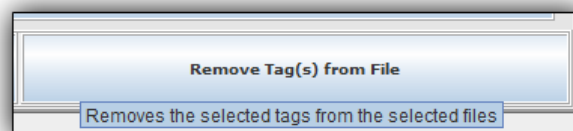
How to Remove Tags from Files

This section describes how to remove tags from files.

1. Select a set of files in the File Hierarchy tab

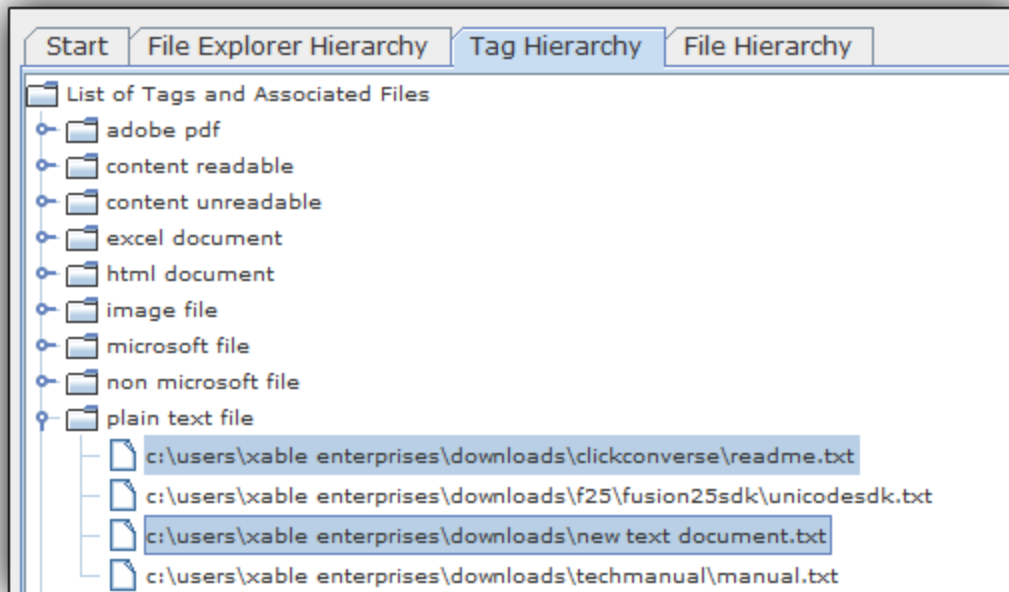2. Select some tags in the Tag Selection List

3. Click the "Remove Tag(s) from File" button. This will remove every selected tag from every selected file.
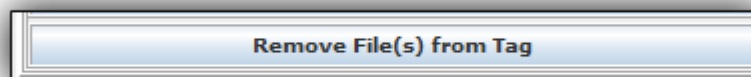
How To Remove Files from Tags

This section describes how to remove files from tags.

Select a Set of Files in the Tag Hierarchy Tab

1. In the Tag Hierarchy tab, expand a tag and choose a set of files under the tag.

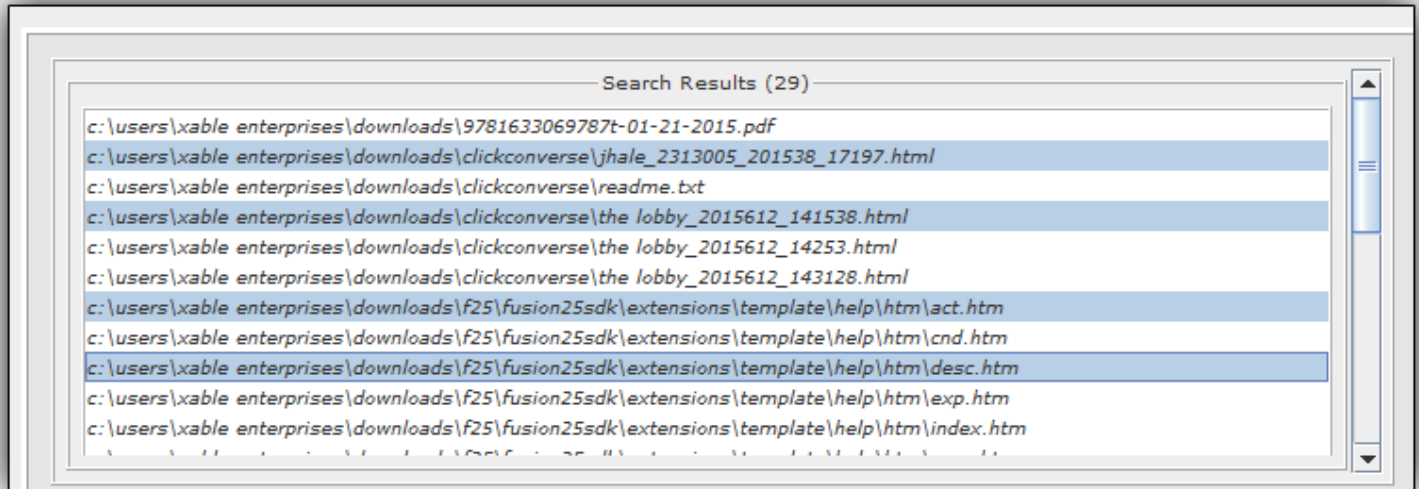## Click the Remove File(s) from Tag Button

2. Click the "Remove File(s) from Tag" button in the Search Pane. This will remove files from the parent tag. Using the above example, the two .txt files will be removed from the "plain text file" tag.

How to Open Queried Files

This section describes how to open queried files after a search has been completed.
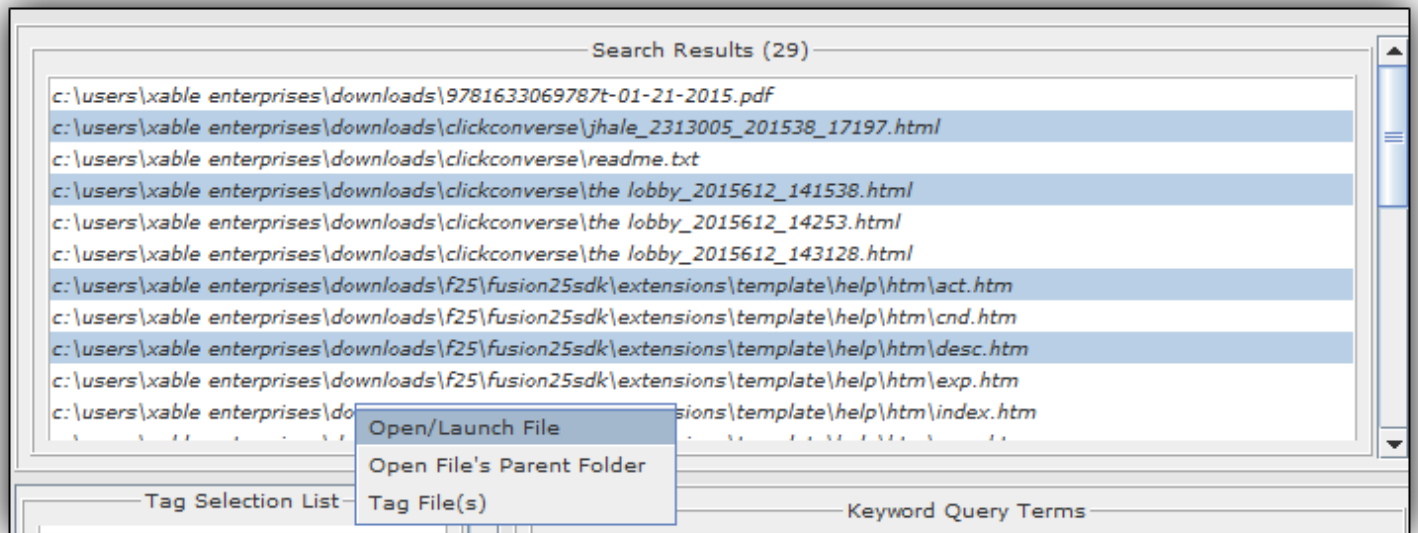
Select a Set of Files in the Search Pane

1. Select a set of files in the Search Pane

Note – You may need to perform a tag-based search first to fill the search results list.
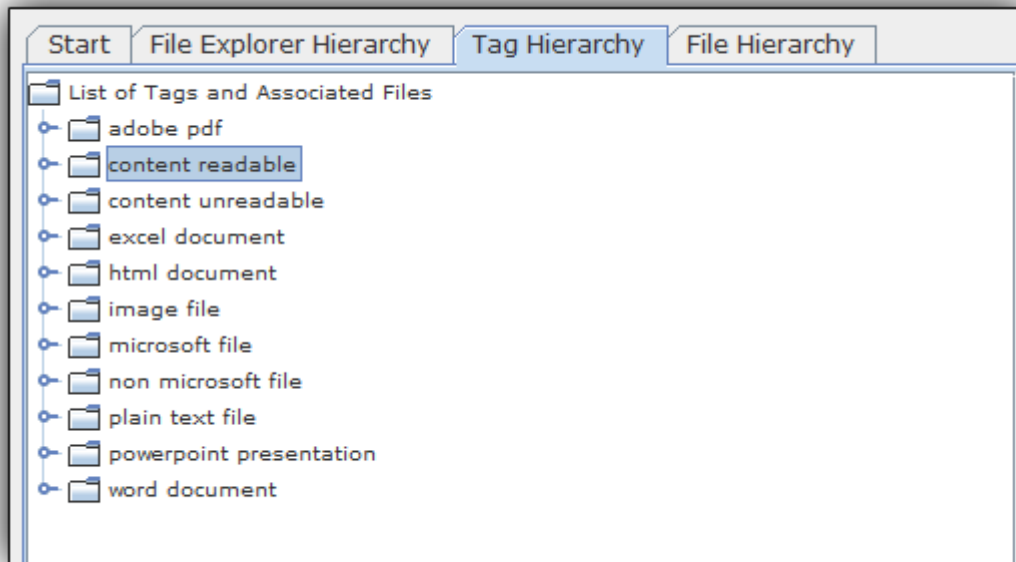
Click "Open/Launch File"

2. Right click in the Search Results list and click "Open/Launch File". This will launch each selected item with the system's default application for the file.

How to Erase Tags from the System

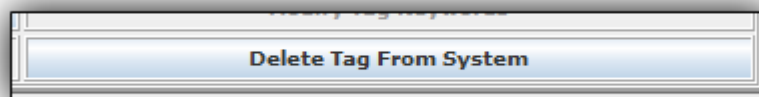This section described how to fully erase a tag from the system (and all files).

Select ONE tag in the Tag Hierarchy tab

1. Select ONE tag in the Tag Hierarchy tab.

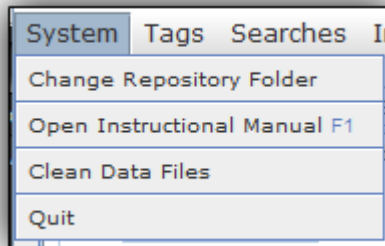## Click the Delete Tag from System Button in the Search Pane

2. Click the Delete Tag from System Button in the Search Pane. This will remove all instances of the selected tag from every file.

Explanation of the Menu Options

The Menu Options

This section describes the various Research Knowledge Manager menu options
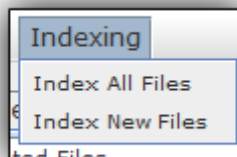
System Submenu

Change Repository Folder - This menu option lets the user change the repository folder for the Research Knowledge Manager. If you need change the repository folder and experience ongoing data issues, you should click the <u>clean data files</u> menu option.

Open Instructional Manual - This menu option opens this instructional manual.

Clean Data Files - This menu option clears all the locally saved files used by the Research Knowledge Manual to function. This menu option all data saved by the Research Knowledge Manager. Use this option with extreme option. Choosing the option will automatically close the Research Knowledge Manager.

Quit - This menu option simply quits out of the system. When the system is closing, all stored data is locally saved to the appropriate places so the system my hang for a couple of moments.

Indexing Submenu

Index All Files - This menu option indexes all files in the system's repository folder. Every file is then automatically tagged based on the file type.

Index New Files - This menu options indexes all files not indexed since the

system's last index operation. Every file is then automatically tagged based on the file type.

Problem Troubleshooting

Research Knowledge Manager Troubleshooting

This section describes some of the more frequent problems you might encounter when using the Research Knowledge Manager.

Possible Troubleshooting Issues

1. **The Research Knowledge Manager keeps saying something fails when I open it** - You may need to click the "Clean Data Files" menu option to restart the system.
2. **The Research Knowledge Manager freezes when I start it** - When it is started, the Research Knowledge Manager takes some time to load & process data. This may take a couple of moments. Just wait and the system will display a message to the Status Message Pane when it is finished.