Document Management

In the Designer interface, the **Documents** view allows you to manage the Communities, Knowledge Centers, Folders, and Files stored within the system, which are collectively referred to as Document Management.

In the Portal, Files stored in Document Management can be displayed on Portal pages, custom dashboards, and as attachments to processes and tasks.

Document Management is a fully-integrated collaboration solution that provides version control, user-rights management, and document search features. Specialized smart services in the Process Modeler allow you to easily generate and integrate managed files into your processes.

The Files, Folders, Knowledge Centers, and Community objects that are used in your processes are represented in Appian using an ID number and a data type. This allows you to write rules and expressions that intelligently select or handle thousands of documents and folders, without suffering a commensurate performance penalty.

Document Management Folders are stored in Knowledge Centers, and Knowledge Centers are stored in Communities. Knowledge Centers and Communities allow you to protect your files with security policies, search policies, change-review policies, file expiration policies, and access approval procedures.

Documents Tab

Keep in mind that documents stored in your private Knowledge Center are restricted with High security. You'll have to add users and groups to the Knowledge Center in order to share any files that it contains.

Search Field

To search for a Community, a Knowledge Center, or a Document, type its name in the search field.

Selecting a Community or Knowledge Center opens the result in the Document Management interface.

Option	Description
View Your Available Disk Space	Each user is allocated a personal storage space quota. Your current usage and quota is displayed on a progress bar.
Upload a document	All users can upload files to their private Knowledge Center. Uploads to other locations require provisioning their user rights.
Starred Documents	All Knowledge Centers, Folders, and Files you select as favorites appear on the starred documents view, which is the primary view displayed for the Documents tab.
Managing Knowledge Center Content	Review and approve changes to high-security Knowledge Centers. This option is only displayed for members of the Document Administrators group.
Administration	View Document Management administration options, such as deactivating a Community and modifying a user's disk space allocation. This option is only displayed for members of the Document Administrators group. See also: Deactivating a Community and Modifying User Storage Space Quotas
Usage Reports	View reports regarding the objects that exist in Appian Document Management, their usage, and the disk space they consume.

Communities

Communities can contain Knowledge Centers and other Communities. As specific groups in an organization might have different file and document management policies, it is often useful to associate Communities with the divisions within your organization.

All users have access to a Personal and Teams Community, which provides a private Knowledge Center and private folders that can only be viewed and updated by the user.

Creating a Community

When viewing the top level (root level) of the Documents tree view displayed in the left navigation, the **New Community** button appears for members of the Document Administrators group. Members of this group can also create sub-Communities within a parent Community.

1. As a Document Administrator, click **New Community** to create a new Community.
    - The **Create New Community** dialog box is displayed.
2. Type the **Name** and (optional) **Description** of the Community.
    - The name can be no longer than 30 characters.
    - The following characters are not accepted for Community, Knowledge Center, or Folder names: `\ / ; : " | ? ' < > \*`
    - We recommend organizing your Knowledge Centers and folders into multiple Communities for maximum scalability.

Moving a Community

1. Select the checkbox next to the name of the Community.
2. Click the **Move** button.
3. Select the Community where you want it moved or leave the selection blank to move it to the root level.
4. Click **OK**.
    - A confirmation message appears in the toolbar.

When a Community is moved, the version history from the files in the Community is preserved in the new location.

Modifying a Community

To update the properties of a Community, select the checkbox next to the name of the Community, click the **Properties** box, update the properties in the dialog box that appears, then click **OK**.

To update the properties of a Community, select the checkbox next to the name of the Community, click the **Properties** box, update the properties in the dialog box that appears, then click **OK**.

Deactivating a Community

A Community can be deactivated to remove it from availability in Appian Document Management. It can only be deactivated if it is empty.

To deactivate a Community, select the checkbox next to the name of the Community, click **Deactivate**, and click **OK** on the confirmation message.

You can also deactive a Community from the **Administration** page from the left-side navigation of the Documents tab.

To reactivate it, open the Administration page from the left-side navitation of the Documents tab, select the commmunity from the Reactivate Community section, and click **Reactivate**.

Knowledge Centers

In Document Management, all folders and files are stored in Knowledge Centers. By creating Knowledge Centers and granting access to other users, you can share files and collaborate with other users.

- Knowledge Centers that are created by the system must not be deleted.

Personal and Teams Knowledge Center

These Knowledge Centers are for personal use. They are not associated with Communities, and access can be limited to select users. They are located under Personal and Teams in the left navigation.

- Most users initially only have rights to create Personal Knowledge Centers.

Temporary Documents Knowledge Center

The Temporary Documents Knowledge Center is used to store system and process objects in transition. It can also be used for document storage by processes and users who are provisioned with rights for the Knowledge Center.

The Knowledge Center can be viewed by the Administrator user, by System Administrators, and by members of the Document Administrators group.

Files that are uploaded using the File form component are stored for a configurable number of days in this Knowledge Center, but they cannot be accessed or viewed from the user interface.

Community Knowledge Centers

These Knowledge Centers are associated with Communities. They are located under Communities in the left navigation of the Documents view.

When you select a Knowledge Center from the left navigation, all folders where you have at least Viewer rights to are displayed. The following toolbar options are also displayed:

To...	Click
View the parent Knowledge Center.	**Up one level**
Start a wizard to create a new folder within the Knowledge Center	**New Folder**
(Administrator Only) Set the expiration interval for files in the Knowledge Center.	**Expiration Duration**
(Administrator Only) View Knowledge Center statistics.	**Statistics**

Creating a Knowledge Center

To create a Knowledge Center in a Community, a user must own the Administrator role for the Community.

1. Click the **Documents** tab.
    - The Documents view is displayed.
2. In the left navigation, select the Community where you want to create the Knowledge Center. (Knowledge centers must reside in a Community.)

- The existing knowledge centers in that Community are displayed.

3. Click the **New Knowledge Center** button on the toolbar.
   - The Create New Knowledge Center wizard is displayed.

See also: Knowledge Center Security.

If the "My Private" Knowledge Center is deleted or renamed, then the server creates a new My Private Knowledge Center and associated Private Documents the next time you view your Personal and Teams Community.

- Downloading a Knowledge Center
- Viewing Knowledge Center statistics

Moving a Knowledge Center

To move a Knowledge Center, a user must own the Administrator role for the Knowledge Center's Community.

1. Select the checkbox next to the name of the Knowledge Center.
2. Click **Move**.
3. Select the Community where you want the Knowledge Center moved.
4. Click **OK**.
   - A confirmation message appears in the toolbar.

When a Knowledge Center is moved, the version history from the files in the Knowledge Center is preserved in the new location.

Updating Knowledge Center Security

See also: Knowledge Center Security

Managing Knowledge Center Content

When a Knowledge Center has High Security (or if the Change Approval option was set to Yes when the Knowledge Center was first created) the following changes made by users must be approved by the Knowledge Center creator or a Knowledge Center Administrator when performed for the first time.

- Creating a folder in the Knowledge Center.
- Deleting a folder that the user did not create.
- Uploading a new file to a folder the user did not create.
- Uploading a new version of a file that the user did not previously upload or update with a new version.
- Deleting a version of a file that the user did not previously upload or update with a new version.

Whenever there are changes pending your approval, the changes are not posted until you have approved them. For example, if a user has uploaded a file, it is not visible in the Knowledge Center until you have approved it.

You automatically receive a notification whenever you have changes to approve or reject in a Knowledge Center.

Once you have approved/rejected user changes, users who made the changes do not receive any notification informing them of the status of their changes. The change is either made available, or not.

Approving Knowledge Center Changes as a Knowledge Center Administrator

1. Open the Knowledge Center.
   - The **Pending Changes** button appears in the toolbar displaying the number of changes that require approval for that Knowledge Center.
2. Click the **Pending Changes** button on the toolbar.
   - All changes that require your approval are displayed.
3. Select the checkbox next to each changed item you want to act upon.
4. Click either the **Approve** or the **Reject** button.

Approved changes are made available immediately. Rejected changes are discarded.

Approving Knowledge Center Changes as a Member of the Document Administrators Group

1. Click the **Documents** tab.
2. Select **Pending Changes** in the left navigation.
   - All pending changes for all Knowledge Centers are listed.
3. Select the checkbox next to each changed item you want to act upon.
4. Click either the **Approve** or the **Reject** button.

Approved changes are made available immediately. Rejected changes are discarded.

Modifying User Storage Space Quotas

By default, a user can upload up to 250 MB of data to their Personal Knowledge Center. Members of the Document Administrators group can modify this amount.

To modify this allocated disk space for a specific user, complete the following:

1. From the left-side navigation of the Documents tab, select the **Administration** page.
2. In the Change User Storage Quota section, type or select a username in the **User** field.
3. Type the size of the disk space quota you want to specify.
    - Type 0 for an unlimited disk space quota.
    - The maximum value for a limited quota is 2047.
4. Click **Change Quota**.

Specifying the Expiration Duration for a Knowledge Center

A Knowledge Center's Expiration Duration determines how long a file can stay in a Knowledge Center before it expires. The default settings are mentioned above.

System Administrators and Knowledge Center Administrators can modify this setting.

1. Click the **Documents** tab on the toolbar.
2. Search for and open the Knowledge Center you want to modify
    - If you have Administrator rights to the Knowledge Center, an **Expiration Duration** button appears on the toolbar.
3. Click **Expiration Duration**.
4. Enter a new number of days in which a file can exist before it expires.
    - To prevent files from ever expiring in that Knowledge Center, enter **0**.
5. Click **OK**.

Folders

One or more folders may be selected by clicking on the respective checkboxes within a Knowledge Center. The following toolbar options are also displayed:

To...	Click
Add the selected folder(s) to your list of starred documents	The **Star** button, next to the folder name
View the parent Knowledge Center	**Up one level**
Download a Zip archive of the selected folder(s)	**Download**
View folder properties	**Properties**
Update access access rights for a folder	**Security**
Transfer a folder from its current folder to a new location	**Move**
Delete the selected folder(s)	**Delete**

See also: Viewing Folder and File Properties

Creating a Folder

When you create a Document Management folder, the users who have access to a folder are inherited from the parent Knowledge Center.

You can set user rights for a folder after it is created by selecting it and clicking **Security** on the toolbar.

Clear the **Inherit security from parent** checkbox. Once this option is cleared, you can modify the access levels of the existing users, or remove users.

The access levels that you are allowed to select for the folder users are determined by their access to the Knowledge Center. The following are the rules on folder access levels:

- Knowledge Center Administrators must be Administrators.
- Authors of the Knowledge Center can have Author, Read-Only, or No Access to the folder.
- Read-Only users of the Knowledge Center can only have Read-Only or No Access to the folder.

These limitations on the permissible access levels are reflected in the buttons next to each user; access levels that are not allowed are grayed out and cannot be clicked. After the folder has been created, you can access the options to change Folder users/access by accessing the Folder Users/Access options in the **Properties Console**.

- See also: Setting Folder User Rights.

To include documents stored in the folder within the Search index, retain the default **This folder will be searchable** option when creating the new folder.

- It is not possible to configure a sub-folder as searchable if the parent folder is configured as **Not Searchable**.

Downloading a Folder

You can download the contents of an entire folder if you have permissions to access the folder.

1. Select the checkbox next to the folder you want to download.
2. Click the **Download** button.
    - The files in the folder are packaged in a ZIP archive.
3. Save the file on the file system.

Up to 5,000 documents and folders can be included in a ZIP archive.

Moving a Folder

You can move folders within Knowledge Centers if you are an Administrator of both Knowledge Centers (the source and destination Knowledge Center).

1. When viewing the folder in Document Management, select the **checkbox** next to the folder.
2. Select the **Move** button on the toolbar.
3. Select the destination Knowledge Center and destination folder.

When a folder is moved, the version history from the files in the folder is preserved in the new destination.

Deleting a Folder

1. When viewing the folder, select the **checkbox** next to it.
    - The Delete button appears.
2. Click **Delete**.

All files contained in the folder must be deleted before you can delete the folder.

Files

A file is any document that you upload to Appian. We use the terms document and file interchangeably.

Files are located in folders. Folders reside in a Knowledge Center. Knowledge Centers reside in a Community. Files cannot be stored directly in Knowledge Centers; a folder must be used.

All documents uploaded into Appian Document Management have an ID associated with them. To find the ID of a document within a Knowledge Center, view the document's properties. Entering the number of a document within the text field on the left navigation allows you to download the document.

1. Select a Knowledge Center to display the folders it contains.
2. Click a folder to display the files within the folder.
3. Download a file by clicking the filename, or by selecting the checkbox associated with the file and then clicking the 

button.
4. Use the download button to handle the download of multiple files, folders, or Knowledge Centers. When more than one file, or a folder, or a Knowledge Center is selected, the files are combined into a single ZIP archive prior to download.

To upload a document, click **Upload Document** in the left navigation. A two-step wizard guides to select (confirm) the destination folder, and to upload to and the document(s).

Viewing Files

You can only view the files, folders, and Knowledge Centers where you have at least Viewer rights. The Knowledge Centers that you can view are displayed within the left navigation.

For sub-folders and files, the following toolbar options are displayed:

To...	Click
Download a Zip archive of the selected sub-folder(s) and/or file(s)	**Download**
Start a wizard to upload multiple files to the current folder	**Upload**
Upload a Zip archive of files (no larger than maximum file upload size) which is then unpacked into the folder. Any folder in the Zip is added as a sub-folder. If a filename contains an illegal character, it is replaced with a hyphen (-). For example, the filename **marketing;planning.doc** would be uploaded as **marketing-planning.doc**.	**Bulk Upload**
View the parent folder	**Up one level**
Create a new sub-folder	**New Folder**
Add the selected sub-folder(s) and/or file(s) to your list of favorite folders and files	The **Star** button, next to the file or folder name
Check-out the selected sub-folder(s) and/or file(s)	**Check Out**
Check-in the selected sub-folder(s) and/or file(s)	**Check In**
Upload a changed version of the file	**New Version**
Send a link to the selected sub-folder(s) and/or file(s)	**Send Link**
View document properties	**Properties**
Transfer a file or folder from its current folder to a new location	**Move**
Remove the selected sub-folder(s) and/or file(s) from the system • Deleted files are also removed from disk	**Delete**

See also: Viewing Folder and File Properties

Adding and Sharing a File

To upload a file, complete the following:

1. Select a destination folder and click **Upload**. -The Choose Destination dialog is displayed, with your current folder selected. Confirm the desired destination folder.
2. Click **Next**. The Pick Files dialog is displayed.
3. Browse to the file that you want to upload.
4. Accept the file name listed in the **Name** field, or modify it if desired.
    - The file name must be at least four characters long (including the three character file extension, such as `.doc`).
    - The following characters are not allowed in document names: `\ / ; : \ | ? ' < > \* </p>`

        - **NOTE**: If you include the file extension in the name, make sure it matches the file type by which the file was saved. If the extension in the name does not match with the uploaded file, it may not display properly.
5. (Optional) Type a description of the file.
    - The description is viewed in the document properties.
6. Click **Submit**.

The Upload New Document Wizard allows you to select up to ten files to upload at a time. The Pick Files dialog displays fields to select between one and three files initially.

- To add fourth file, click the **Upload more files** link.
- Repeat this step for each file you want to add (up to 10 files).

To upload ten or more files, complete the following:

1. Compress your files into a ZIP format archive.
2. Select the destination folder.
3. Click **Bulk Upload**.
4. Confirm the destination directory.
5. Select the ZIP archive from your local machine. Click **Upload**.

NOTE: Any illegal characters used in filenames by files in your ZIP archive are replaced with hyphen (-) characters upon upload.

Sending a Link to a File

You can send the link of newly uploaded files to the folder users. A link is often helpful if you want to inform people about a new file or a new version of a file.

1. Select the checkbox next to the file.
2. Click **Send Link** then **OK**.
3. Select the users and groups you want to alert in the Recipients combination box.
    - For multiple selections, click on the user names along with the key on the keyboard, then click **OK** to add the selected users to the list of recipients.
4. Accept or edit the default message subject.
5. Type your message in the rich text area.
6. Click **Submit**.

Moving a File

You can transfer a file from its current folder to a new location. The history of previous versions is retained.

To move a file, complete the following:

1. When viewing the file, select its checkbox.
    - The **Move** button appears on the toolbar.
2. Click **Move**.
    - The Choose a Folder dialog box is displayed.
3. Select a destination Community, Knowledge Center, and folder and click **OK**.
    - An alert appears on the toolbar.

Alerting Users to the New Location

If you need to notify users about the new location of the file, view the file in its new location, select its checkbox, and click **Send Link**.

Renaming a File

To rename a file as a Knowledge Center Administrator, complete the following:

1. While viewing the file in Document Management, in a Knowledge Center where you have administrator rights, select the checkbox next to the file.
2. Click the **Properties** button.
    - The **File Properties** dialog box is displayed.
3. Type a new name in the **Name** field.

To rename a file as a Knowledge Center Author, complete the following:

1. Download the file.

2. While viewing the file in Document Management, select the checkbox next to the file.
3. Click the **New Version** button. Select the downloaded file.
    - The old file name is listed in the name field.
4. Type a new name in the name field.

Deleting a File

Only users in the Document Administrators group or users who have Administrator or Creator rights to a folder can delete files from it.

- Creator rights refer to the fact that a user with Author rights for the folder cannot delete files unless that user also created the folder.

To delete a file, search for select the file, then click **Delete**.

- This action removes the file from availability in Appian and removes the file on the server's filesystem.

Adding a New Version of a File

Files stored in Document_Management are managed using version control, which keeps a copy of the prior file versions when a new version of the file is uploaded.

1. When viewing a file from the Documents tab, select the checkbox next to the file.
2. Click **New Version**.
    - If the file is not locked, the first dialog of the **Upload New Version** wizard is displayed.
3. If the file is locked, click **Check in** to display the **Upload New Version** wizard.
    - If you are not the user who checked out the file, you cannot upload a new version.
4. Select the new version of the file from your local machine.
5. Accept the file name listed in the **Name** field, or modify it as needed.
    - The file name must be at least four characters long (including the three character file extension, such as `.doc`).
    - **NOTE**: If you include the file extension in the name, make sure it matches the file type by which the file was saved. If the extension in the name does not match with the uploaded file, it may not display properly.
6. (Optional) Type a description of the file.
    - The description can be viewed in the document properties.
7. Click **Submit**.

Viewing a Previous Version of a File

Once there is more than one version of a file, a number appears in the version column for the file, indicating how many versions exist.

To view a previous version of a file, complete the following:

1. Open the folder where the file is located.
2. Click the number listed in the **Version** column.
    - Entries for the Current version and all prior versions of the file display.
3. Select the desired file version.
4. Select whether you want to open or save the file.

Deleting a File Version

When more than one version of a file exists, you can delete any of the versions from the list. This includes the current version, original version, and any previous versions.

Deleting the current or original version removes the file from the available downloads, but the file still exists in the system. Deleting a previous version removes that version completely from the system.

To delete a version of a file, complete the following:

1. Open the folder where the file is located.
2. Click the number listed in the **Version** column.
    - Entries for the Current version and all prior versions of the file display.
3. Select the checkbox next to the file version you want to delete.
    - The **Delete** button appears on the toolbar.
4. Click the **Delete** button.

By default, files in the System Knowledge Center and My Private Knowledge Center expire after 9999 days, files in the Temporary Documents Knowledge Center expire after one year (365 days), and files stored in all other Knowledge Centers never expire.

After a file expires, viewers and authors of the file cannot access it unless the file is reinstated.

Viewing Expired Files

System Administrators and Knowledge Center Administrators can view expired files.

If one or more files in a Knowledge Center have expired or are within 14 days of expiring, a button appears on the Knowledge Center's toolbar next to **Expiration Duration** indicating the number of files expired or soon-to-be expired. For example, **27 Expirations** .

Click this button to view a list of these files, and select a file from the list to open it.

Reinstating an Expired File

System Administrators and Knowledge Center Administrators can also reinstate an expired file by resetting the upload date to today.

To reinstate a single file, open the list of expired files as mentioned above, select the checkbox next to the file, and click **Reset**.

To reinstate all files within a Knowledge Center, you can reset the Expiration Duration to a longer duration; however, this affects all files in the Knowledge Center AND the original upload date is still used on each file.

Deleting an Expired File

Even though expired files are not accessible by viewers and authors, they are still a part of the system.

To delete an expired file, open the list of expired files as mentioned above, select the checkbox next to the file, and click **Delete**.

Reports

Appian Report Files (.ARF) are stored in Document Management.

- When the link to the report file is clicked, you have the option to open or save the file.
    - The report file is only viewable within the system.
- Click the **(View)** link next to a report to open the report for viewing within the system.

Available Storage Space

Each user has an allotted amount of personal storage space (250 MB by default). Every file you add to Personal Knowledge Centers in Appian Document Management counts towards your allotted space, which is reflected by the progress bar that decreases as you add more files. Once you reach that limit, you will no longer be able to add more files. Files you upload to other Community Knowledge Centers do not count against your personal allotted space.

To view your available personal disk space, click the **Documents** tab.

- Your available disk space is displayed in the left navigation.