Administrator Manual

Version 3.5.4

KnowledgeTree™
Document Management Made Simple

KnowledgeTree 3.5.4 Administrator Manual

http://www.knowledgetree.com/

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Welcome to KnowledgeTree

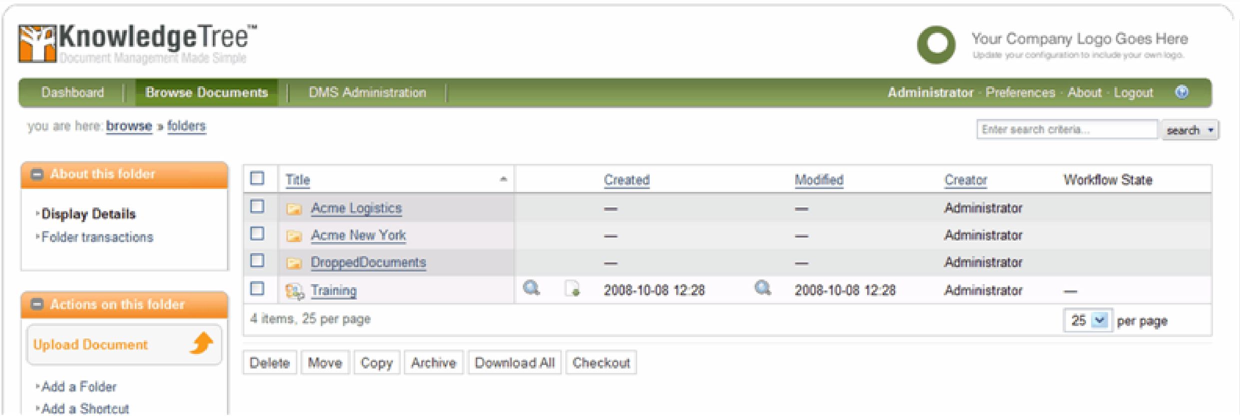
Part 1

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.



Browse View

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.

1.1 About this Help

The **KnowledgeTree Administrator Manual** is an introduction to KnowledgeTree Document Management System and a reference guide that you can use when working with KnowledgeTree. This Help is intended for use by the KnowledgeTree system administrator.

This Help assumes that your KnowledgeTree installation is complete, and that you have a predefined plan for the implementation and roll out of KnowledgeTree Document Management System in your organization.

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

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.

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 KnowledgeTree support staff and engineers, with guaranteed response times.

Find out more about KnowledgeTree's Commercial Support services, see 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 our support staff, developers, and the KnowledgeTree community, around installing, managing, and using KnowledgeTree.

KnowledgeTree Documentation

The following documentation is available from http://www.knowledgetree.com/resources: (View Online / Download PDF)

- KnowledgeTree Installation Guide
- KnowledgeTree User Guide
- KnowledgeTreeLive User Guide
- KnowledgeTree Client Tools User Guide
- A Guide to the Integration Interfaces into KnowledgeTree
- A Guide to the Document Import Interfaces into KnowledgeTree

Don't see what you're looking for?

Try the following:

- 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 listed at the KnowledgeTree Wiki and at http://www.knowledgetree.com/community

1.3 KnowledgeTree Editions

KnowledgeTree is available in three Editions:

KnowledgeTree Commercial Editions (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.

View Support Options for KnowledgeTree Commercial customers, and compare products.

See also:
Installing / viewing / removing your KnowledgeTree Commercial licence

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 a 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. Download KnowledgeTree Community Edition for evaluation and use.

KnowledgeTree Community Edition is suitable in many document and records management scenarios. 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:

- KnowledgeTree Product Overview and Deployment Options
- KnowledgeTree Features Summary
- KnowledgeTree Editions Comparison Matrix
- KnowledgeTree Commercial Edition Features

For more information, call us on **+1 415 692 1418**, email sales@knowledgetree.com or visit http://www.knowledgetree.com

1.3.1 KnowledgeTree Commercial Features

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

Note: *Some functionality is available only to the KnowledgeTree administrator. For information on actions available to all KnowledgeTree users, see the KnowledgeTree User 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* (available to view online, or download the PDF).

See Also:
Connecting to the KnowledgeTree Server through KnowledgeTree Explorer

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

- **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

1.4.1 Organizational Hierarchy

Organizing Users

Users, Groups, Roles, and Units

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

- Users
  KnowledgeTree assigns permissions to Groups and to Roles, but not to individual users. Each user added to KnowledgeTree must be added to a group or a role before they will be allowed even 'read' access to the content repository.

- Groups
  The Groups you add to KnowledgeTree are defined by your business process, industry, and organizational policies. Examples are: Management, Research, Finance, Development, Marketing, Human Resources, etc.

  Whether or not you use groups also depends on the number of users in the organization - in a smaller organization for example, you may prefer to use roles, rather than adding a single user to a group. Groups typically contain one or more users, and any user may belong to one or more groups. Permissions are assigned to groups on specific folders, and a group's permissions automatically filter through to group members in a process called 'inheritance'.

- Roles
  Roles (e.g. Editor, Auditor, Publisher etc) are used to assign specific permissions to individual users or groups, typically to perform specific functions in the system. If you have groups that would consist only of one user, rather use Roles to assign permissions to the user. Groups may also be allocated to Roles on a per-directory basis. Roles are particularly useful in workflows.

- Units
  Adding a Unit adds a folder to a specified location in the folder structure.
  Note: *Units are added in the Users and Groups section of the DMS Administration module in KnowledgeTree's web interface.*
  The Unit concept is typically used to divide an organization's content repository into separately accessed and managed areas that may model logical business units - different departments or geographical locations for example.

  Units are an optional tool that you may want to consider using in your KnowledgeTree implementation in the following instances:
  - to separate content in your document management system into disparate business units (by department, or by region, or by another categorization as required in your organization)

  - to delegate administrative rights to another user besides the system administrator, within the unit folder - the unit administrator will have administrator privileges only within their unit, to override or allocate specific permissions within the unit folder

- to set the contents in the Unit folder as the default browse view - users will then go straight to the Unit folder when logging in to KnowledgeTree and opening Browse Documents

Note: *You may configure this custom view by changing the following default settings in* ***DMS Administration - System Configuration - General Settings (Tweaks)****: Browse to Unit Folder (setting this value to True specifies a logged in user's Unit folder as their default folder view in Browse Documents - the default 'False' displays the root folder).*

What is the difference between roles and groups?

KnowledgeTree permissions are assigned on folders, to groups and/or to roles. From a permissions perspective, a group is a static collection of users - all users in a group have the permissions assigned to their group, on all folders and files where the group has been allocated permissions.

Roles allow you to assign permissions dynamically - you can assign one or more users or groups to a role that has its own permissions set up, typically specific to tasks that need to be performed by the role. Roles may be used in workflows, where specific users are required to transition a workflow or perform other workflow tasks. Roles may also be used to apply company-wide security policies in the document management system, or they can be used to allocate a specific permissions set up to particular users on specific folders - a user may have the 'Manager' role in one folder, and the 'Publisher' role in another folder.

The following example describes how users may be practically assigned to Roles to perform specific tasks. Let's say you want to assign most of the available folder permissions to a group of users in the 'Accounting' group on the 'Accounts' folder, but you only want to give the departmental manager the 'delete' permission and the 'manage security' permission on the 'Accounts' folder. In this case the departmental manager may be part of the Accounting group, but for purposes of their role as a manager, this user is assigned the 'manager' role, and the role is given an individual set of permissions that includes all the permissions of the group, plus the additional permissions they require to perform their role.

Organizing Content - setting up the file system and document metadata

Successfully implementing a paperless, electronic document management system requires careful planning around how best to store documents so that they can easily be retrieved from the system when required.

Right from the start, the project manager (or implementing person or team) should consider the organization's business process and their document management and records retention policies in order to set up a logical file system and metadata structure that will be most useful for finding content later on.

Metadata Structure

Documents comprise both content (information) and context (metadata, or 'information about information'). KnowledgeTree's search functionality searches a document's content and/or document metadata to return relevant results.

KnowledgeTree captures user-input metadata through document types, fieldsets, and related fields. The system administrator creates this metadata structure by adding the document types, and then planning and creating associated fieldsets. One or more related fields are added to each fieldset, and then the fieldsets are associated with one, more, or all document types in the system.

Field level metadata may include, for example: the name of the author, the date the document was created, the last time the document was modified, the version number, and the document type (e.g. Invoice). Groups of one or more related fields are added to each fieldset - for example, you may want to create a fieldset called 'Customer Details', and add fields such as 'customer name', 'address', and 'contact number'. Every fieldset may be associated with one or more document types; then, when adding documents and selecting the document type, the user is presented with related fields to fill out to capture the document metadata.

File Structure
The design of your document management file structure also provides a context for documents stored in the system. For example, by adding an invoice to a folder called 'Invoices' in a higher level folder called 'Accounts', the document file path may be included in search criteria to find relevant documents.

Some organizations use a shallow folder structure and rely mostly on document metadata to store, manage, and retrieve documents in KnowledgeTree. This structure has implications for the security of your system because permissions are allocated at the folder level and anyone who has permissions on a folder also has those permissions on all content in the folder. Deepening the folder structure (i.e. root - folder - sub folder - sub folder - document, instead of root - document, or root - folder - document) thus allows greater control on content through the permissions system.

Other organizations employ a deeper folder structure and combine the use of metadata and the logical file system to organize documents and folders in the system. This structure typically models the file structure used in your existing paper filing system, creating a familiar environment for new users used to browsing a system to find specific documents and folders, and helping to convey the concept of the document management system as an electronic version of the paper-based filing system.

1.4.2 Version Control

KnowledgeTree's version control mechanisms ensure that content is changed in a controlled and audited manner.

The table displays the available version control mechanisms in KnowledgeTree:

Check out	Checking out a document locks the file and makes it **read only**. Other users can view the file, but they cannot change it.
Check in	A file must be checked in to the repository to make it available to other users for editing. The **cancel check out** function reverses the check-out action, restoring the document to the state it was in before it was checked out. The system administrator is allowed to force check in a document. This is useful if a document is required urgently, and the user who checked out the document is unavailable.

Incremented Versions	By default, new documents are given version number 0.1. Each time a document is checked out, the version number increments by 0.1 if the change is minor - version 0.9 becomes 0.10, for example. If you indicated that the change is major, the version number increments by 1.0 - so, from 1.0 to 2.0, for example.
Version History	The **Version History** link in the **Document info** menu provides a history of version changes for the currently selected document.

1.4.3 The Permissions System

The files and folders stored in the KnowledgeTree content repository are secured through Permissions.

Any user may only access content where they have the appropriate permissions on the do cument or folder. This includes the ability to 'view' the folder or document in the folder structure.

Since permissions are assigned per folder to Groups and Roles, and not to individual users, users must belong to a group, or be assigned to a role, in order to obtain the permissions assigned to the group or role on the folder.

KnowledgeTree's default permission types
KnowledgeTree includes the following default permission types:

- **Read -** allows you to view a document and its metadata, in search results and the Browse view.
- **Write** - allows you to change a document's content and its metadata, to check out and check-in a document, and to add new documents in the folder where you have this permission.
- **Add Folder** - allows you to add new folders to a folder where you have this permission
- **Manage Security** - you may configure and edit security on the folder and on content in the folder, including editing of permissions and roles.
- **Delete** - you may delete files and folders in a folder where you have this permission on the parent. folder.
- **Manage Workflow** - allows you to change the Workflow settings on a document, such as performing a transition.
- **Folder Details** - allows you to view the folder name, a transaction history, and other details linked to the folder name

Note: *To view content in the folder you will also require the 'read' permission.*

- **Rename Folder** - allows you to rename the folder.

How are permissions assigned?

Permissions are allocated by group, by role, and by folder.

Permission assigned on this level ...	description
Folder Permissions	Permissions on a folder are automatically assigned to the folder creator and to the KnowledgeTree administrator. By default, any permissions granted to a parent folder (the top level folder, typically in the root folder) apply to all content in the folder (subfolders and documents), and any changes to the permissions of the top level folder are passed down to the folder content (permissions inheritance). Users with the appropriate permissions on the parent folder may override the default inheritance of permissions within the folder in order to allocate different permissions on subfolders. Permissions inheritance may be reinstated at any time. See Viewing / Editing Folder Permissions, KnowledgeTree Organizational Hierarchy, Adding / Editing / Deleting Units.
Role Permissions	Permissions may be assigned to one or more Roles (e.g. Editor, Auditor, Manager) to allow groups or users assigned to these roles to perform specific functions or tasks. ***Note:*** *Role permissions are useful in Workflows, which are typically created for roles, rather than for groups.* See KnowledgeTree Organizational Hierarchy, Adding Roles, and Assigning / Editing Roles
Group Permissions	Permissions on a folder may be granted to groups, or to roles. When granting permissions to groups, all users in the group are given the permissions of the group. See Viewing / Editing Folder Permissions

See Also:

Security and Permissions / How Permissions are Allocated - an article on the KnowledgeTree Wiki

1.4.3.1 Creating the Permissions Structure

When setting up a permissions structure for KnowledgeTree in your organization, consider the following:

- whether users are imported from Active Directory, or from LDAP
- whether additional user groups will be added within KnowledgeTree, or whether all users are imported from Active Directory/LDAP

- whether users are logging in remotely
- whether you are allowing anonymous users to log in
- whether users must be hidden from each other
  Note: *In this case, metadata can be added to the fieldsets, instead of displaying client information. Alternatively, configure options such as 'email separation by group'.*
- the importance of security for the organization and its repository
  Note: *Government agencies are typically expected to be highly secure, and most organizations own confidential documentation that needs to securely stored and accessed in the document management system. In both cases, external users should be identified and prevented from accessing restricted areas of the repository.*
- the importance of permissions for the repository
  Note: *Permissions may be less important where the system is only used by internal users, or where everyone requires access to all or most of the content in the repository.*
- whether units and unit administrators are required
  Note: *Units are useful where the organization prefers to split the administrative role (e.g. by department, or by geographical regions). Units are manually created within KnowledgeTree. They're not supported in Active Directory or LDAP, so they cannot be imported into KnowledgeTree.*
- whether role-based permissions are required
  Note: *Roles are a KnowledgeTree concept that are used to allocate permissions on a document or folder to an individual user. Typically, permissions are granted to the group, and thus to all users in the group.*
- whether dynamic permissions are required
  Note: *Dynamic permissions change, based on metadata.*

1.4.4 The Metadata Structure

Metadata is 'information about information'. In the document management context, we can say that metadata is 'information about content in the repository'.

Within KnowledgeTree, metadata comprises the information added to the system in the document types, fieldsets, and fields that are used to categorize content in the repository.

How do Document Types, Fieldsets, and Fields fit together?

Document types, fieldsets, and fields represent a hierarchical classification of metadata. Document types are the highest-level categorization, and fields represent the smallest unit of information:

```
Document type\
          fieldset\
                field
```

Document Types	The document type of a document provides context for the document. The number of document types you add to KnowledgeTree depends

	entirely on your organization. Examples include: Invoice, Order Form, Quotation, Requisition, Publication, Proposal, Specification, Presentation, Leave Application, Survey, White Paper, Article, Brief, Offer to Purchase, Mandate, and so on.
Fieldsets	Each fieldset contains one or more related fields, e.g. you may want to add fields called client name, street address etc to a fieldset called 'Client Details'. Fieldsets may be either 'generic' (applying to all document types in the system), or 'type-specific' (only used in a specific document type).
Fields	Fields are the lowest level of metadata in KnowledgeTree, and are used to capture information entered on document upload. For example, an 'Invoice' may include the following field level information: client name, street address, telephone number, email address.

Adding Metadata

Document types, fieldsets, and fields are configured through KnowledgeTree's web interface, in **DMS Administration - Document Metadata and Workflow Configuration**.

Adding this metadata structure involves the following tasks:
Step 1: For each planned document type, create the fieldsets, and add fields within each fieldset
Step 2: Add the document types, and associate each document type with one or more fieldsets

Example:

- Document Type: Invoice
- Associated fieldsets: Client Details; Invoice Details
- Fields in the 'Client Details' fieldset: Name, Address, Telephone Number, Email Address
- Fields in the 'Invoice Details' fieldset: Invoice Number, Account Number, Purchase Date, Sales Consultant; Description, Price, Quantity, Discount

Metadata and Content Retrieval

KnowledgeTree's Search function operates on the metadata layer, and its security and access control function operates on the folder level. The folder structure is thus static and consistent, while metadata is contextual.

Browsing the folder structure to locate documents and folders is time consuming, so KnowledgeTree provides the ability to predefine efficient content retrieval mechanisms, such as quicklinks, document links, shortcuts, views, and simple and advanced search. The efficiency of these mechanisms in the system rely on the existence of useful, contextual metadata.

The successful implementation of an electronic document management system in an organization requires careful planning of the metadata structure to ensure that the process of harvesting metadata for search and retrieval purposes delivers useful information that supports and enhances the most productive use of your system.

Understanding the role of metadata, and careful configuration of the document types, fieldsets, and fields, will help you to achieve this goal.

1.4.4.1 Creating Effective Document Types and Fieldsets

Adding document metadata creates a high-level storage structure for the KnowledgeTree content repository. Configuring the metadata layer involves adding your document types, fieldsets, and fields.

How to create effective document types

Document types are the highest layer of the metadata structure, so an appropriate grouping of documents at this level ensures that lower level groupings (fieldsets and fields) are easier to structure. Start by ensuring that your document types fit your business processes.

Providing descriptive, generally applicable names to document types minimizes the number of document types that will be required in the system, thus limiting the number of options on the document type pick list. When users need to scroll through an excessive list of selectable document types, they're less likely to select a relevant option, which reduces the effectiveness of your system metadata.

How to create effective fieldsets

Each field in a fieldset is a data collection point for the fieldset. Collecting appropriate and relevant information improves search results and avoids the requirement for users to complete lengthy forms. KnowledgeTree allows you to configure the field type - options include: 'lookup' (pick list), 'text', or 'tree'. Select the most appropriate option for the type of information required in the field.

Consider the following:

- Define the minimum number of fieldsets per document type, especially when users will need to select options from a pick list.
- Display the most important fieldsets at the top of a list, especially for 'required' information.
- Be aware of the limitations of conditional fieldsets. These are useful for limiting the number of values available in pick lists, but they have two major disadvantages: they are complex, and they are not supported in KnowledgeTree Tools for Windows.
- Use tree structures only where appropriate.
  Note: *Tree structures do not work in KnowledgeTree Tools for Windows.*
- Use pick lists instead of text fields where possible. This allows you to pre-define selectable metadata, which prevents inconsistencies arising due to incorrect and incomplete text entries. Users may be less likely to properly complete text fields, and pick lists are quicker to complete, provided that they don't contain too many options.
- Limit the number of selectable options in a pick list to around 10 items - excessively long pick lists are not user-friendly
- Carefully select the fields that are a 'required' selection, and those that are 'optional'

selections - users are unlikely to complete all 'optional' fields, but they will also not want to complete too many 'required' fields.

- Define a meaningful name for each field and fieldset.
- Provide clear definitions and instructions for the type of information required in each field and fieldset, and include an example of the format. For example, let's say you have a field called 'document id' - here you can provide the following description: 'This number identifies the file according to the repository's standard naming convention e.g. organizationegapc001'.

1.4.4.2 Metadata and the Folder Structure

This section explains the relationship between the metadata structure and the folder structure in KnowledgeTree, and how permissions are assigned within the overall structure.

Storing Metadata

Metadata may be stored by:

- document - e.g. 'Project Plan - Project Alpha'
- folder - e.g. 'Project Plans'
- unit - e.g. 'Engineering Department
- fieldset - e.g. 'Project Department information'
- field - e.g. a pick list with available project departments

Metadata is most effectively stored in a combination of folders and fieldsets:

When using ...	Result
Folders, without fieldsets	This structure may be too deep and complex. Users may struggle to browse the folder structure, and search is less effective.
Fieldsets, without a folder structure	This structure prevents effective browsing, navigation, and search because you cannot rely on users to properly complete all metadata field entries. Additionally, without a folder structure, there is no way to apply permissions.

Storing Metadata in the Folder Structure

Although the folder structure may be designed to map exactly to the metadata, such a structure is hard to manage. This is because the lower levels of the folder structure (level 1 in the example) should be as static as possible.

In the following example, it's easier to change the structure at level *3* than at level *2*, and it's easier to change the structure at level *4* than at level *3*. In this instance, each time a new client is added, it is necessary to add a new *Client[no]* folder. By storing the client id (e.g. 001) in the metadata layer of the *Invoice* folder, users can browse to the *Invoice* folder, and rely on metadata after that.

Example: The document type, document title, and the client number, which are all metadata, are stored in the folder structure:

Level	Folder hierarchy			
1	Accounts Receivable			
2		Invoice		
3			2005	
4				Client 001

Note: *To ensure usability, the folder structure should not be deeper than 3-4 levels.*

The following example shows three layers of metadata, which may be represented as follows:

'Project Department>>Project Name>>Project Document'

or ...;

Project Department: *Human Resources*
Project Name: *Recruitment*
Project Document: *Applicant evaluation form*

Each of these storage methods provide a specific structure:

This storage method ...	provides this structure ...
Storing all information in a folder structure	>Human Resources >>Recruitment >>>Applicant evaluation forms
Placing all documents in a single folder, and storing the metadata in fieldsets and document types	Document type: Human Resources Pick list: Recruitment (Projects) Pick list: Applicant evaluation form (Project document types)
Creating e a hybrid of folder structure and fieldsets/document types	Folder structure: >Human Resources >>Recruitment Document type: Applicant evaluation form

Metadata, Permissions, and the Folder structure

A single, secure, searchable organizational repository must have a system of permissions, Permissions are applied on the folder structure, while the repository's **Search** function is based on the metadata layer.

Without a folder structure, all the information about the documentation is in the metadata. It is impossible to apply permissions to this structure, because all the content is effectively in one folder - the root folder.

It is possible to apply a folder structure that is similar to the metadata structure - e.g. create a folder name of the same name as the document type: *Invoice* document type, and *Invoice* folder. This allows permissions to be assigned on the *Invoice* folder, and it allows searching of invoice related metadata.

1.4.5 Introduction to KnowledgeTree Workflows

A document management system **Workflow** is a task and process management tool that applies an automatic, predefined life-cycle to selected documents in the system.

How do I add and configure a worklow?
Note: *Links to Configuring Workflows in this Manual, where you will find full instructions for setting up workflows in your system.*

Workflows allow you to automate certain business processes. For example, an invoice is created, distributed, then paid; a report may be created, reviewed, edited, and then published.

Each workflow describes a series of tasks that must be performed on a document in the workflow, and it specifies the user/s responsible for these tasks. At the end of each task, the document is moved to the next stage in the workflow, and the workflow engine alerts the responsible user for the start of the next task.

Components of a KnowledgeTree Workflow

- **Transition** - defines the move from task to task in the Workflow. At the end of each task, a document in a workflow 'transitions' to a new 'state'. For example, in an Invoice Workflow, a transition called 'payment received' may move the document to the workflow state called 'Paid'. Each state may have one or more transitions, depending on the workflow topography.

- **State** - defines a position in the workflow between tasks. Workflows begin with starting states, and are complete at an 'end state'. KnowledgeTree also allows you to configure workflows that loop, in which, at the end of a particular state, the document automatically moves back to the starting state.

- **Action** - defines document actions that may be disabled or enabled in certain workflow states. For example, let's say you have defined a 'Publication' workflow that defines the life cycle of a document from a starting state of 'Draft', through one or more intermediate edit and review states, ending in the 'Published' state, and you want to prevent the document from being checked out for further editing after it has reached the 'Published' state, then you could disable 'check out' once the document reaches the workflow state 'Published'.

- **Trigger** - defines a condition that must be met before a workflow may transition to another state. A trigger can also be a task that the system must perform when a transition is made, such as moving the document to another folder.

Workflow Example:
Starting state: Invoice created
transition: Send to client
New State: Distributed
transition: Await payment
End state: Paid

Configuring Workflows

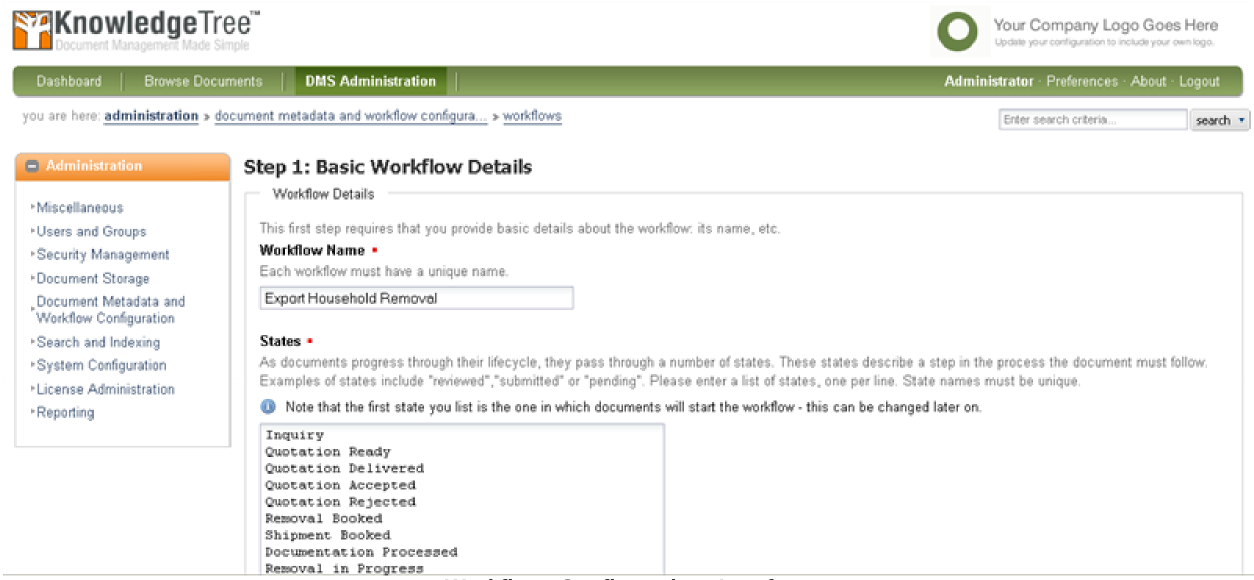
KnowledgeTree workflows are configurable to various levels of granularity - the workflow can be in more than one state at any time, and it is not necessary to move the document in a linear fashion, from one state to a logical, subsequent state. States and Transitions may be arranged in any order, depending on the complexity of the workflow.

Workflows and Permissions
Permissions assigned through a Workflow override existing folder permissions - you may assign additional permissions or remove a user's existing folder permissions. Workflows are the only subtractive permissions tool in KnowledgeTree.

KnowledgeTree permissions are typically assigned to groups and roles, only on folders. Within a Workflow, permissions are assigned to users who are in a group or role that is part of the workflow, on folders and on documents in the workflow.

***Note**: When configuring Workflows, it is important to remember that the permissions you set up in a Workflow (security by state) can override the permissions you set up on your folder structure. This is especially important where you have pre-configured a complex folder permissions system before adding Workflows.*

The Workflow Configuration Interface



Workflow Configuration Interface

1.4.6 Integrating with Third Party Applications

KnowledgeTree and 3rd-Party WebDAV Clients

Performance and functionality on 3rd party WebDAV clients is not verified. To protect your repository, take a cautionary approach when using these clients with the KnowledgeTree Integration Server.

***Note:** At the time of writing (October 2008), KnowledgeTree Explorer for Windows is the only native client for KnowledgeTree Integration Server.*

Limited access is provided to the following 3rd party WebDAV clients:
- Windows XP Explorer WebDAV
- KDE Konqueror

- Novel NetDrive
- Cadaver

Note: *We are continually extending the functionality of 3rd Party Clients for KnowledgeTree Integration Server and KnowledgeTree Tools for Windows. For more information on the various WebDAV clients, go to: http://www.greenbytes.de/tech/webdav/webfolder-client-list.html*

Performance and known issues on some WebDAV clients:

- Windows (XP, Vista and Novel) - does not support overwriting
- Vista - double clicking on folders won't open the folders; open folders using the tree navigation on the left pane, or right click on the folder, then select *Open*.
- Goliath (Mac OS X) - does not support copying and moving of documents or folders
- Mac OS X Finder - spaces in folder and document names are not supported, and are therefore replaced with a '+' sign.
- Locking is not supported on any 3rd Party WebDAV clients

Enabling 'write' Mode on 3rd Party WebDAV Clients

3rd Party WebDAV clients are limited to **read-only** mode in the **default** installation. To enable **write** mode, edit the **config.ini** file in the KnowledgeTree **var** folder and turn *off* **SafeMode**. The file is created by default on first use of the KnowledgeTree Integration Server.

Windows users - Web Folders Update

Windows users who want to use Windows Explorer WebDAV *must* install the Web folders update, available at http://support.microsoft.com/?kbid=907306.

Authentication

Authentication under Windows XP (KnowledgeTree Commercial users) requires that you append the port to the hostname - e.g. http://www.hostname.com:80/kt3/baobab/
KnowledgeTree Community Edition users, use http://www.hostname.com:80/kt3/ktwebdav/

See Also:

Configuring WebDAV on KnowledgeTree Community Edition

KnowledgeTree Web Service

The KnowledgeTree Web Service provides a simple, yet powerful mechanism for automating application-to-application communication.

KnowledgeTree's Web service layer, using SOAP, is the simplest way of integrating external applications with KnowledgeTree.

More information about KnowledgeTree Web Service:

- White papers (A Guide to Document Import Interfaces into KnowledgeTree; A Guide to the Integration Interfaces into KnowledgeTree)
- More about Web Service on the KnowledgeTree Wiki
- Call **+1 415 692 1418**, email sales@knowledgetree.com, or visit http://www.

knowledgetree.com.

Part 2

2 Getting Started

This section provides a high level walk-through of the system tasks that should be performed after installing or upgrading KnowledgeTree.

Pre-requisites:

- Download and install KnowledgeTree (Commercial Edition or Community Edition), or sign up for KnowledgeTreeLive
- Start KnowledgeTree; then, log in to KnowledgeTree's web interface.

Note: *See the KnowledgeTree Install and Upgrade Guide for installation instructions.*

Perform the following tasks:

1. If this is a new installation and you have logged in for the first time, change the default admin login password.
   Note: *First time login credentials are: Username 'admin' and Password 'admin'.*

2. Install your KnowledgeTree Commercial Edition license (if applicable)

3. Check that Indexing is running.
   Note: *When installing or upgrading KnowledgeTree, the installers set the default server address to* ***127.0.0.1*** *in the system_settings table in the database. The Indexer retrieves this address from the database in order to start indexing. In the event that Indexing does not start, or stops running, you need to delete the default value (127.0.0.1); then, log in to KnowledgeTree via an external URL - preferably the proper DNS that is set up for all KnowledgeTree users, e.g. https://dms.acme.com (where 'acme' = your domain name), and not from localhost, or 127.0.0.1. Logging in via an external URL saves the correct server address to the database, and allows indexing to start.*

4. Enable emailing on the KnowledgeTree server, if this is not yet set up.

5. Read plugins from the file system, and enable the plugins you want to use.

6. Verify Document Storage - this ensures consistency between the database and the repository.

7. Plan and add your organization's Unit folders, if applicable.

8. Plan and add your folder structure and your documents, using one or more of the following methods:
   - migrate documents (see the KnowledgeTree Installation Guide)
   - import documents from a server location
   - perform a bulk upload (zipped folder)
     Note: *See the best practice tips for bulk uploads, on the KnowledgeTree wiki*
   - use KnowledgeTree Hot Folders to import content and metadata (See the KnowledgeTree Client Tools User Guide)
   - use the KnowledgeTree Drop Box to drag and drop folders and documents into KnowledgeTree.
     Note: *By default, documents and folders added to KnowledgeTree using KnowledgeTree Drop Box are added to the Dropped Documents folder in the root folder in Browse Documents, and from this folder you can move content into the appropriate folder locations.*

9. Plan and add the system metadata structure:
   - add document types

- add fieldsets and add fields
- associate fieldsets with document types as required

9. Plan and add the workflows for your organization's business processes.

10. Perform administrative tasks, such as configuring views, adding or editing disclaimer text, and adding or editing Quicklinks.

11. Plan and add your organization's users and groups:
    - add groups, and define whether the groups have system administrator privileges and/or Unit administrator privileges (as applicable)
    - add and enable users
    - add users to groups
    - add roles, if required

Note: *Users must be added to one or more groups; then, allocate folder permissions to the groups to allow users in the groups to view and work with content, e.g. to give a user at least the ability to view all folders, you need to add that user to a group that has at least the 'read' permission, and the 'folder details' permission on the root folder, and also on any unit folders that you want to allow the user to view in the system.*

12. Plan and define the system's permissions structure
    - add custom permissions, if required
    - set up the permissions assignment on folders

2.1 Starting KnowledgeTree

How to start KnowledgeTree on Windows

This procedure starts KnowledgeTree on Windows.

Note:

- *The KnowledgeTree Server, and some of its components and services, may be started, stopped, installed, and uninstalled, through the Start menu on Windows.*
- *From KnowledgeTree version 3.5.2, KnowledgeTree installs as a service by default.*
- *In earlier versions, the KnowledgeTree Installer provides an option to install KnowledgeTree as a service, which allows KnowledgeTree to start automatically whenever you start the server that hosts your KnowledgeTree installation. Alternatively, you can choose to install KnowledgeTree as a console, which requires that you start and stop KnowledgeTree through the Start menu (on Windows). If you have not installed KnowledgeTree as a service through the Stack Installer, you can choose this option through the Windows Start menu after the system is installed.*
- *The KnowledgeTree server package includes Apache and MySQL*

Perform the following steps:

1. On Windows, click **Start - All Programs - KnowledgeTree Document Management System Commercial - Start Here**.
   Note: *If this is an earlier version of KnowledgeTree (prior to version 3.5.2) installed as a console; then, start Apache and MySQL before starting KnowledgeTree - To do this, click* ***Start*** *-* ***All Programs*** *-* ***KnowledgeTree Document Management System Commercial*** *-* ***Run Document Management System as Console*** *-* ***All*** *-* ***Start KnowledgeTree Document Management System Commercial****.*

2. The KnowledgeTree web interface Login screen displays in your browser. Enter your KnowledgeTree username and password; then, click ***Login***.
   Note: *First time users, use the default admin credentials: username 'admin' and password 'admin'.*

How to start KnowledgeTree on Linux

This procedure starts and stops KnowledgeTree on Linux.

Note: *The KnowledgeTree installer installs KnowledgeTree as a console on Linux, and installs the following compulsory components and services, which are required for the proper functioning of KnowledgeTree Document Management System: Apache, MySQL, OpenOffice, Indexer, Scheduler*

Perform the following steps:

1. Open a terminal to start KnowledgeTree via the command line interface.
2. Type `cd ktdms/`.
3. **What do you want to do?**
   - **Start KnowledgeTree as a console.** Enter the following command: `./dmsctl.sh start`. This option starts the servers - Apache and MySQL, and all services: OpenOffice, Indexer, Scheduler.
   - **Stop KnowledgeTree.** Enter the following command: `./dmsctl.sh stop`. This option stops the servers and services.
   - **Stop the Apache server only.** Enter the following command:`./dmsctl stop apache`
   - **Start the Apache server only.** Enter the following command:`./dmsctl start apache`
   - **Restart the Apache server only.** Enter the following command:`./dmsctl restart apache`
   - **Stop MySQL server only.** Enter the following command:./dmsctl stop mysql
   - **Start MySQL server only.** Enter the following command:./dmsctl start mysql
   - **Restart MySQL server only.** Enter the following command:./dmsctl restart mysql

2.2 Login

How do you want to log in to KnowledgeTree?

- Log in to KnowledgeTree's web interface
- Log in through KnowledgeTree Explorer (Windows only)

About Login - default passwords, providing access to users, and authentication

Default Administrator Password

When installing KnowledgeTree, a default administrator profile is created automatically to allow initial access to the system. You may use these default credentials to log in to KnowledgeTree's web interface the first time, and each time until you choose to change the administrators username and password:

Username: admin
Password: admin

For security purposes, please change the default administrator credentials at your earliest convenience. If you forget your new system password, you may also restore the default admin password.

Authenticating users

You may control user access to KnowledgeTree using one of the following authentication methods:

- external authentication - use your organization's own central authentication infrastructure (e.g. Active Directory or LDAP)

- database authentication - this is the default; involves using KnowledgeTree's internal database to allow users to log in

When using database authentication, KnowledgeTree verifies each user's details on login, and allows or disallows access to folders and documents, and to actions that may be performed on content in the system (e.g. read, write) based on the user's login credentials, and the permissions granted to their user profile.

The system administrator chooses the authentication method when adding users to KnowledgeTree.

Session Timeout

When adding users, the KnowledgeTree administrator defines, for each user, the number of times the user will be allowed to log in after a maximum number of successive session timeouts. This prevents multiple users from logging in to the system via the same authenticated user profile, simultaneously, and/or from different computers. Users who are denied access based on their maximum login limit will need to contact the system administrator to regain access to KnowledgeTree.
Note: *By default, users are logged out automatically after a period of inactivity.*

2.2.1 Logging in - KnowledgeTree Web Interface

This procedure logs in the administrative user to KnowledgeTree's web interface.

Note: *When installing or upgrading KnowledgeTree, the installers set the default server address to* ***127.0.0.1*** *in the system_settings table in the database. The Indexer retrieves this address from the database in order to start indexing. In the event that Indexing does not start, or stops running, you need to delete the default value (127.0.0.1); then, log in to KnowledgeTree via an external URL - preferably the proper DNS that is set up for all KnowledgeTree users, e.g. https://dms.acme.com (where 'acme' = your domain name), and not from localhost, or 127.0.0.1. Logging in via an external URL saves the correct server address to the database, and allows indexing to start.*

Prerequisites:

The following servers and services must be running:
- KnowledgeTree Server
- Apache, MySQL

- Document Indexer Service
- OpenOffice Service
- Scheduler Service

Note: *All services must be running for Search and the conversion to PDF functionality to work.*

Perform the following steps:

1. Use your web browser to navigate to the location (URL) of your KnowledgeTree server. The KnowledgeTree Login page displays.

2. Enter your administrative login details in the **Username** and **Password** fields.
   Note: *First time users, use the default admin credentials: username 'admin' and password 'admin'.*
   Note: *Your username and your password are case-sensitive. If you have forgotten your admin login credentials, see Restoring the Default Admin Password.*

3. Click ***Login*** to open KnowledgeTree at the dashboard.

Login Screen_Commercial_3.5.3a

How do I log out?
Click the ***Logout*** button to log out of KnowledgeTree's web interface.

2.2.1.1 Changing the Default Admin Password

This procedure changes the default administrator password.

Please Note:
- The KnowledgeTree installer creates a default administrator profile during installation to allow initial access to the system - username 'admin'; password 'admin'.
- For security purposes, change the default admin credentials as soon as you have completed the installation. You will need to log in to KnowledgeTree's web interface to change this password.

Perform the following steps:
1. Use the default administrator credentials to log in to KnowledgeTree's web interface (username 'admin' and password 'admin').

2. Click the **Preferences** tab.

3. Update the administrator user profile on the Preferences page. Any of the following fields may be changed, if required: name, email address, and to enable/disable email notifications.

4. Click **Change your password**.

5. Enter a new password in the **Password** field; then, re-enter the new password in the **Confirm Password** field.

6. Click **Set password**.

2.2.1.2 Restoring the Default Admin Password

This procedure restores the default administrator credentials that are created automatically during installation to provide initial access to the KnowledgeTree:
- username - admin
- password - admin

Have you forgotten your password?
Click the 'Forgot Password' link on KnowledgeTree's web interface Login screen.

Perform the following steps:
1. Navigate to KnowledgeTree_Directory\mysql\bin in the command prompt.

2. Enter the following command: `mysql.exe -u dmsadmin -p dms`

3. Run the following SQL command within MySQL:
   `UPDATE USERS SET password='21232f297a57a5a743894a0e4a801fc3' WHERE id=1;`

4. You will be logged in with the following credentials:

- username: **admin**
- password: **admin**

2.2.1.3 Customizing the KnowledgeTree Web Interface Login Page

This procedure adds a custom logo to KnowledgeTree's web interface Login page.

Perform the following step:

1. Locate the KnowledgeTree directory.

2. Replace the following image image file:
   <KnowledgeTree Directory>/knowledgeTree/resources/graphics/ktlogo-topbar-right.png

3. The image on the Login page will reference the new image the next time the Login page is displayed.

2.2.2 Logging in - KnowledgeTree Explorer

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

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

Prerequisites:
You will need *all* of the following:

- KnowledgeTree Commercial Edition Installed, and all services running (KnowledgeTree Server, Apache, MySQL)
- KnowledgeTree Commercial Edition license installed
- KnowledgeTree Client Tools for Windows installed on the client
- Valid connection configured from KnowledgeTree Client Tools for Windows to the KnowledgeTree server

Note: *For information on installing KnowledgeTree Commercial Edition and the KnowledgeTree Client Tools for Windows package, see the KnowledgeTree Installation Guide.*

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: *KnowledgeTree Explorer displays a permissions-based view of the files and folders in KnowledgeTree. If this is the first time you are logging in to KnowledgeTree or if you have not yet changed the default credentials created during the server install, you may log in to KnowledgeTree with username 'admin' and password 'admin'. Please change the default admin credentials at your earliest convenience.*

2.3 KnowledgeTree License

How do I buy a KnowledgeTree License?

Contact KnowledgeTree Sales to purchase your KnowledgeTree Commercial Edition license:
Call us: +1 415 692 1418
Email us: sales@knowledgetree.com

Before you buy ...

- Compare editions - see the Editions Feature Matrix on the KnowledgeTree website
- Find all your purchasing questions answered at our Sales and Purchasing FAQ

What about a Free Trial?

You may download a KnowledgeTree Commercial Premium Trial for a limited, free period.
Note: *KnowledgeTree will send you a Trial license; remember to install your license to unlock KnowledgeTree's Commercial On Premise functionality.*

About expired licenses

License renewal notices display on the system administrator's dashboard 30 days before an existing license is due to expire.

Should your license expire before you install a new one, access to KnowledgeTree Commercial functionality (provided through the Commercial Plugins), access to commercial support, and access to KnowledgeTree through KnowledgeTree Explorer is suspended. All functionality and services are restored as soon as you install your new license.

How do I install my KnowledgeTree Commercial License?

Where can I see the details of my existing KnowledgeTree Commercial License (user numbers and expiry date)?

2.3.1 Managing Licenses

This procedure adds your KnowledgeTree Commercial license and displays and removes existing licenses.

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

Pre-requisites:

- If you have purchased a License key, or if you are using the Trial license, KnowledgeTree Sales will email your License key to you. You need to have downloaded the key to your local environment (i.e. to your desktop, or to a network location from where you can upload it to KnowledgeTree's web interface).

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open

DMS Administration - License Administration.

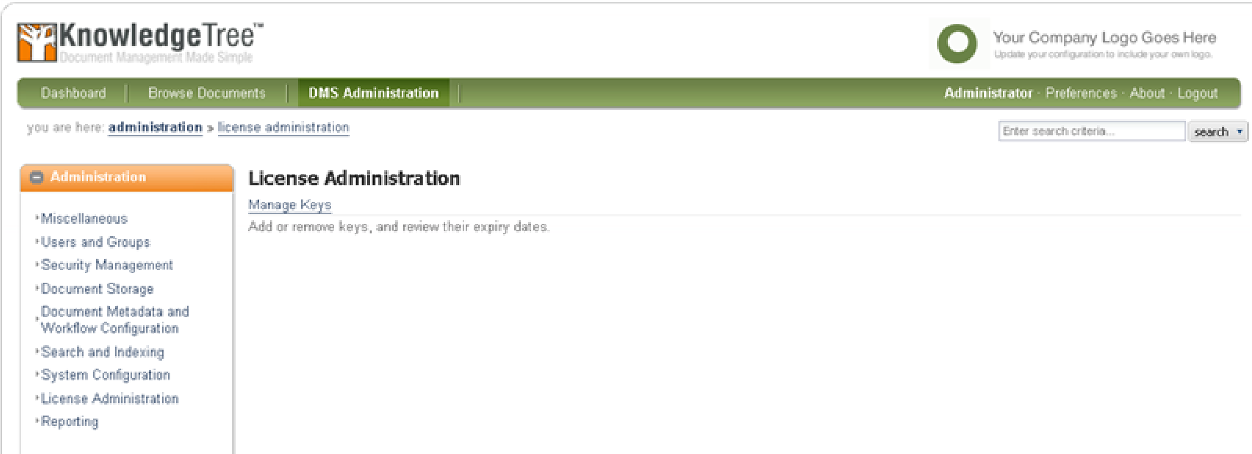
2. Click ***Manage Keys***.

3. **Do you want to ...**

- **add a new license key?** In the **Add new key** section, click ***Browse*** to locate the key on your local environment; then, click ***Add License***. Your license key displays on the page with the following information: number of licenses, expiry date, number of days to expiry, organization name.
Note: When upgrading from one license type to another, you need to delete the old key.

- **view existing keys?** Your existing keys are listed on the page. Only 1 key is active at one time. The key that expires first appears at the top of list.

- **remove a license key?** Click the ***Delete*** link for the relevant key.



Managing Licenses

2.4 Configuring KnowledgeTree

2.4.1 KnowledgeTree config.ini

This topic describes settings that may be changed in KnowledgeTree's config.ini file.

Note: *Starting with KnowledgeTree 3.5.4, most of KnowledgeTree's configuration options may be viewed and edited through the web interface, in DMS Administration - System Configuration.*

KnowledgeTree config.ini

Recommended minimum configuration changes

- `[db]` - change the default user name and password
- `[email]` - used to enable email notifications (requires setting the SMTP server)

Note: *These settings are changed in DMS Administration - System Configuration, in KnowledgeTree's web interface.*

Configuration Settings

`[db]`

The database engine. You will need to change at least some of these settings (such as the default username and password, which are created automatically during installation).

- **Database type**

  Note: *At the time of writing (September 2008), MySQL is the only supported database type.*

```
dbType = mysql
```

- **Database Login Details**

  Note: *These are the MySQL database usernames and passwords. You may need this information when backing up your database or upgrading. Passwords are user-defined during installation; passwords displayed below are therefore example values only.*

Database host details	dbHost = localhost dbName = dms dbPort = default
Unprivileged Database User	dbUser = dms dbPass =
Privileged Database User	dbAdminUser = dmsadmin dbAdminPass =

[KnowledgeTree]

KnowledgeTree automatically detects the default settings in this section. Do not change these settings manually unless you understand the consequences of your actions. Changing these settings incorrectly may introduce errors into your system.

- **The path to the install location for KnowledgeTree on your system**

  Note: *Leave the default to have this automatically detected.*

```
fileSystemRoot = default
```

- **The Web server name (host name)**

  Note: *Leave the default to have this automatically detected.*

```
serverName = default
```

- **Defines whether or not SSL is enabled**

  Note: *Leave the default to have this automatically detected.*

```
sslEnabled = default
```

- **The path to the Web application from the root of the web site -**

i.e. if KnowledgeTree is at http://example.org/foo/, then rootUrl should be '/foo'
Note: *Leave the default to have this automatically detected.*

```
rootUrl = default
```

- **Defines whether the platform supports `PATH_INFO`**

  Provides improved file identification support on *nix systems - not necessary if you use file extensions.
  The current default is true.

```
pathInfoSupport = default
```

- **The location of binaries on your system**

  The default is to the path set for your Web server; this works for Unix-like systems, but may require changes for Windows systems.

```
execSearchPath = default
```

- **Defines whether to use the new Dashboard.**

  The default is `true`.

```
useNewDashboard = true
```

- **The level of logging to use - DEBUG, INFO, WARN, ERROR**

  Note: *By default, this option is not enabled in the system; logLevel is commented out in the config.ini file, and is typically only activated for troubleshooting and support purposes.*
  The default is INFO.

```
logLevel = DEBUG
```

- **Defines the location of the mime magic file.**

  The default is /usr/share/file/magic

```
magicDatabase = default
```

`[storage]`

- **The storage manager to use for the storage of documents on the file system**

  The default is `KTOnDiskHashedStorageManager`

```
manager = default
```

`[ui]`

- **Main logo**

```
mainLogo = ${rootUrl}/resources/oemlogo.png
```

- **Main logo width, in pixels**

```
mainLogoWidth = 219px
```

- **Main logo alternative text, for accessibility purposes**

```
mainLogoTitle = ACME Knowledge Management Systems
```

- **The location of the 'Powered by KnowledgeTree' logo**

```
powerLogo = ${rootUrl}/resources/powered-by-kt.gif
```

- **'Powered by KnowledgeTree' logo's width in pixels**

```
powerLogoWidth = 130px
```

- **'Powered by KnowledgeTree', alternative text for accessibility purposes**

```
powerLogoTitle = Powered by KnowledgeTree
```

- **IE-specific GIF theme overrides**
  Using the additional IE-specific GIF theme overrides may prevent arbitrary theme packs from working without having GIF versions available.
  The default is `true`.

```
ieGIF = default
```

- **Automatically Refresh the Page**
  Change this setting to `true` to automatically refresh the page after the session would have expired.
  The default is `false`.

```
automaticRefresh = default
```

- **'dot' command location**
  On Unix system, to determine whether the 'dot' application is installed.

```
dot = dot
```

[tweaks]

- **Enabling PHP Error Logging**
  Change this setting to `true` to enable PHP error logging to the log/php_error_log file.

```
phpErrorLogFile = false
```

[urls]

- **The directory where KnowledgeTree stores information - e.g. documents**
  Important: *Do not change this setting unless you are an authorized and experienced administrative user, and you understand the implications of changing this information.*
  Note: *Values for these settings are specific to your installation - e.g. different on Windows and Linux. Values shown below are thus examples only.*

```
varDirectory = C:/Program Files/ktdms/var

logDirectory = ${varDirectory}/log

documentRoot = C:/Program Files/ktdms/Documents

uiDirectory = ${fileSystemRoot}/presentation/lookAndFeel/
knowledgeTree

tmpDirectory = ${varDirectory}/tmp
```

- **The dedicated feed URL**

```
dedicatedrsstitle = RSS Feed Title
dedicatedrssurl =
```

- **Files**

```
stopwordsFile = ${fileSystemRoot}/config/stopwords.txt
```

[session]

- **IP address for sessions**
  Change this setting to `true` if you want to force sessions to come from the same IP address.
  The default is `false`.

```
ipTracking = false
```

[export]

- **Encoding to use in the bulk export plugin**
  The default is UTF-8

```
encoding = default
```

[cache]
This configuration enables and disables the cache, and defines the cache location.

- **Enables the cache**
  The default is `false`.

```
cacheEnabled = false
```

- **The location of the cache**

```
cacheDirectory = ${varDirectory}/cache
```

2.4.2 Disabling the Metadata Prompt in KnowledgeTree Explorer

This procedure disables the metadata prompt that displays on document upload in KnowledgeTree Explorer.

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

Note: *The ability to disable the metadata prompt in KnowledgeTree Client Tools for Windows is supported in KnowledgeTree 3.4.3 and above.*

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **DMS Administration - System Configuration - Client Tools - Client Tools Policies**.

2. In the **Client Tools Policies** section, change the following settings to *True*:
- Explorer: Metadata Capture
- Office: Metadata Capture

3. Click **Save Config Settings**.

4. Restart KnowledgeTree Client Tools for Windows to enable the new settings.

2.4.3 Configuring SSL for the Apache Server

This procedure manually configures SSL for the Apache server in the KnowledgeTree stack.

Important

HTTP over SSL encryption secures all communications between the client Web browser and the server. You can enable SSL automatically through the stack install/stack upgrade, or; perform the procedure manually, on Windows or Linux, as outlined in this topic.

Prequisites:

- **Linux users:** Start the server as **ROOT** to allow Apache to bind to port **443.** To do this, you may need to install KnowledgeTree as the root user so that the configuration files are assigned the correct permissions.
- **Windows users:** Create a SSL certificate before performing the following procedure.

Perform the following steps:

1. Open the following file in a text editor (e.g. Notepad, for Windows users): **{$INSTALLDIR}/apache2/conf/httpd.conf**.

2. Remove **#** at the start of the following line:
   #LoadModule ssl_module modules/mod_ssl.so

3. Restart DMS services:
   - Windows users: via the **Start** menu
   - Linux users: via **dmsctl.sh** script

4. Connect via your Web browser (using **https://xxxxxxx/**)

2.4.4 Connecting to KnowledgeTree installed on an OpenSuse Server

This procedure configures your firewall to allow traffic to the KnowledgeTree port, when connecting from any type of operating system to KnowledgeTree installed on a Linux (OpenSuse) Server.

Note: *These instructions are written for Windows XP, but are valid for allowing a connection from any type of operating system to KnowledgeTree installed on OpenSuse server.*

Perform the following steps:

1. Install the KnowledgeTree server on your Linux machine.

2. Add the KnowledgeTree port to the Allowed Ports page:
   2.1. Select menu option K (the chameleon).
   2.2. Computer - Administrative Settings (YaST).
   2.3. In the window that opens, enter the root password (if you are not already logged in as root).
   2.4. The YaST control center dialog box opens.
   2.5. Select Security and users - Firewall.
   2.6. Select Allowed services - Advanced.
   2.7. Enter your KnowledgeTree port in the TCP Port box.

2.8. Click **OK**; then, click **Next**.

3. Open a terminal session to get the IP address of the Linux Server:
   3.1. Type sudo su -
   3.2. Enter the root password (if not logged in as root).
   3.3. Type ifconfig
   3.4. The IP address of the Linux Server displays - this is the server where you have KnowledgeTree installed.

4. On the Windows machine, enter the Linux server IP address and the KnowledgeTree port:
   4.1. Open your Internet browser.
   4.2. Enter the IP address of the Linux server, and the KnowledgeTree port.
   4.3. You should now have access to KnowledgeTree on the Linux machine.

2.4.5 Connecting to the KnowledgeTree Server through KnowledgeTree Explorer

This procedure adds and removes connections to the KnowledgeTree server through KnowledgeTree Explorer.

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

Note: *The connection with the server allows KnowledgeTree Client Tools for Windows users to interact with the Web based KnowledgeTree repository. When upgrading your version of KnowledgeTree Client Tools, the upgrade installer restores previously configured connections. If your password is not saved, you will need to re-enter your credentials to connect to the server.*

Perform the following steps:

1. Launch KnowledgeTree Explorer on the client to open the KnowledgeTree Server Connections dialog box.
   Note: *Use the KnowledgeTree Explorer desktop icon; or, click **Start - All Programs - KnowledgeTree Tools - KnowledgeTree Explorer**.*

2. **Do you want to...**
   - **add a new connection?** Click **New**; then, go to step 3.
   - **test an existing connection?** Select the connection in the display field; then, click **Test**.
   - **remove a connection?** Select the connection in the display field; then, click **Delete**.

3. Define the following details for this connection:
   - a display name
   - the full URL to the KnowledgeTree installation - the server address e.g. https://dms.acmecorporation.com/
   - your user name and password, and whether your password should be saved for this profile
   - define whether you want to save your password

4. **Do you want to configure a proxy server for this connection?**
   - **Yes.** Define proxy server details; then, go to step 6.
   - **No.** Go to step 6.

5. Click **Test** to verify that the connection is valid.

6. **Is the connection valid?**
   - **Yes.** Click **OK** on the system message; then, click OK on the KnowledgeTree Server Connections dialog box to open KnowledgeTree Explorer.
     Note: *For information about using the KnowledgeTree Client Tools for Windows, see the* ***KnowledgeTree User Guide****.*

   - **No.** Check that the configuration details you entered are correct.

2.4.6 Configuring WebDAV on KnowledgeTree Community Edtion

This procedure creates a WebDAV connection for KnowledgeTree Community Edition.

Note: *KnowledgeTree Commercial Editions customers who are using Microsoft Windows typically use KnowledgeTree Client Tools for Windows.*

A WebDAV dashlet on the KnowledgeTree Dashboard provides instructions for connecting to the WebDAV server. To connect to KnowledgeTree via a third-party WebDAV client, use http://127.0.0.1:8080/webdav/webdav.php.

Pre-requisites:
- Commercially supported 3rd-Party WebDAV client
- Windows users who want to use Windows Explorer WebDAV *must* install the Web folders update, available at http://support.microsoft.com/?kbid=892211.
- KnowledgeTree installed

Perform the following steps:
1. In your WebDAV client, use one of the following URLs:
   - http://your_kt_install/ktwebdav/ktwebdav.php
   - https://your_kt_install/ktwebdav/ktwebdav.php

   Notes:
   - *On some clients you may need to replace http:// or, https:// with webdav:// or webdavs://*
   - *KnowledgeTree Commercial: use /baobab.php*
   - *KnowledgeTree Community Edition: use /ktwebdav.php*
   - *Authentication under Windows XP requires that you append the port to the hostname*

   - e.g. http://www.hostname.com:80/kt3/baobab/. KnowledgeTree Community Edition users, use http://www.hostname.com:80/kt3/ktwebdav/

3. (Optional) Set safe mode to 'off' at the end of the config.ini file to allow write access to WebDAV clients: `safemode = off`
   Note: *See 3rd-Party WebDAV clients for more information on this step.*

See Also
- For more information on issues with various WebDAV clients, go to http://www.greenbytes.de/tech/webdav/webfolder-client-list.html

2.4.7 Troubleshooting

Indexing does not start, or there is a problem with Indexing

When installing or upgrading KnowledgeTree, the installers set the default server address to 127.0.0.1 in the system_settings table in the database. The Indexer retrieves this address from the database in order to start indexing.

In the event that Indexing does not start, or stops running, you need to delete the default value (127.0.0.1); then, log in to KnowledgeTree via an external URL - preferably the proper DNS that is set up for all KnowledgeTree users, e.g. https://dms.acme.com (where 'acme' = your domain name), and not from localhost, or 127.0.0.1. Logging in via an external URL saves the correct server address to the database, and allows indexing to start.

Some KnowledgeTree functionality does not work when using Internet Explorer 6 on Windows2003

It has been found that Windows 2003 forces Internet Explorer to stop any scripting running in the background, whereas KnowledgeTree requires scripting to work properly on some pages. To resolve scripting related issues - such as apparent failures on document upload (when the document is found to have been added), and an inability to 'show all' users - Internet Explorer 6 users who are running KnowledgeTree on Windows 2003 are advised to change their IE6 security settings to enable active scripting, and to set security level to 'medium'.

To change IE security settings:

1. Open Internet Explorer.
2. Click **Tools** to open Internet Options.
3. Open the Security tab; then, click **Custom level ...** to open Security Settings.
4. In the **Reset custom settings** drop down, select Medium.
5. Click **Reset**; then, click **OK**.

Full text Search does not work

1. Enable the Indexing plugin
2. Ensure that you have the appropriate programs installed
3. Ensure that config.ini section 'indexer' contains the correct paths to the files (especially on Windows)

KnowledgeTree toolbar does not display in Outlook

The KnowledgeTree Outlook plugin is disabled by default if an error occurs when Microsoft Outlook shuts down.

1. In Microsoft Outlook, click **Help - About Microsoft Office Outlook**.
2. In the dialog box, select the **Disabled Items** button.

Cannot access Root folder content

This error occurs when the root folder is renamed without updating the `rootfolder` setting in the KnowledgeTree config.ini file. Although it is no longer possible to change the name of the Root folder in KnowledgeTree, this error may still occur where your server is upgraded from a past installation in which the Root folder name was changed.

To verify the Setting correct Root folder name in config.ini ...

1. Open the KnowledgeTree config.ini file, located in the KnowledgeTree folder.
2. Locate the following setting in the [BaobabSettings] section in the config.ini file.

```
rootfolder = Root Folder
```

3. Compare this value with the root folder name specified in KnowledgeTree - any difference may introduce errors in your system. Ensure the value in the config file at this setting is exactly the same as the root folder name in the code.
4. Save your changes; then, close the file.

Managing KnowledgeTree

Part 3

3 Managing KnowledgeTree

KnowledgeTree's web interface is the main portal to KnowledgeTree document management system. KnowledgeTree is managed almost entirely through its web interface administration module, **DMS Administration**

When interacting with the KnowledgeTree document management system through interfaces other than the web interface, you will need to establish a connection with the server address (URL) that directs to the web interface. This allows users to work with content in the KnowledgeTree system from within Microsoft Office applications (using KnowledgeTree Client Tools for Windows), through third party WebDAV clients, or from other applications through KnowledgeTree Web Service.

KnowledgeTree Web interface - modules and toolbar

Web Interface Toolbar

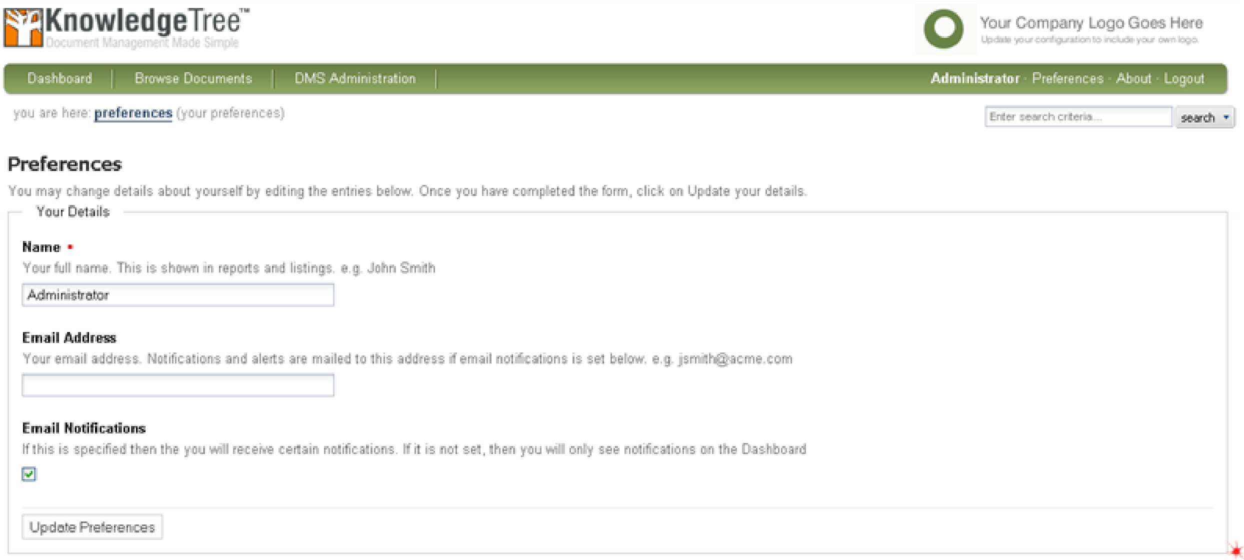
- **Dashboard**
  The main page of the KnowledgeTree document management system's web interface - contains customizable, view or hide dashlets, a search bar, editable welcome screen, quicklinks, and access to RSS feeds and tag clouds.

- **Browse Documents**
  The **Browse Documents** module contains your organization's content repository. Any logged in user sees only those files and folders where they have at least appropriate 'read' permissions. The default view of Browse Documents is a familiar, hierarchical file and folder structure, but you may choose to view content categorized by folder, document type, lookup value, or by the tags defined in your system.
  Note: *User-level tasks performed in Browse Documents are documented in the* ***KnowledgeTree User Manual****.*

- **DMS Administration**
  KnowledgeTree's main administrative engine is only accessible to administrative users. Here you can configure users and groups, security, document storage options, document metadata and workflows, onscreen help, saved searches; read and enable plugins, view system information, verify database consistency with the repository, manage views, edit disclaimer text. KnowledgeTree Commercial Editions also include license management functions and reporting.

- **Preferences**
  The Preferences tab provides an editing screen to change your personal details, including your username and password, your email address, and to define whether or not you want to receive notifications via email.

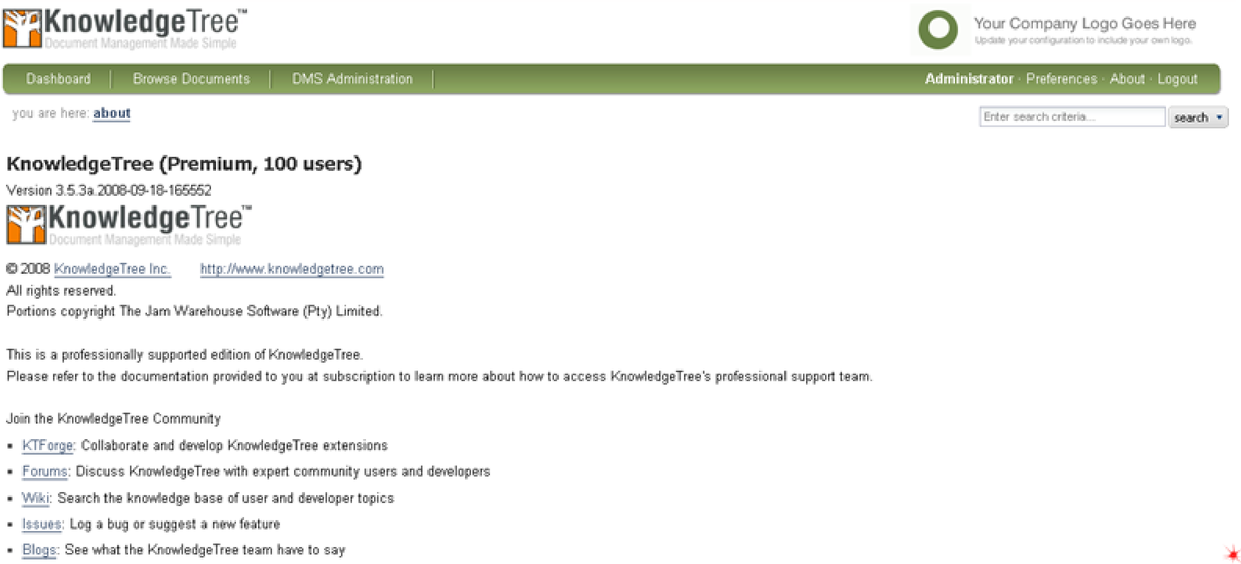
  Note: *For more information on this section, please see the* ***KnowledgeTree User Manual****.*



Preferences

About

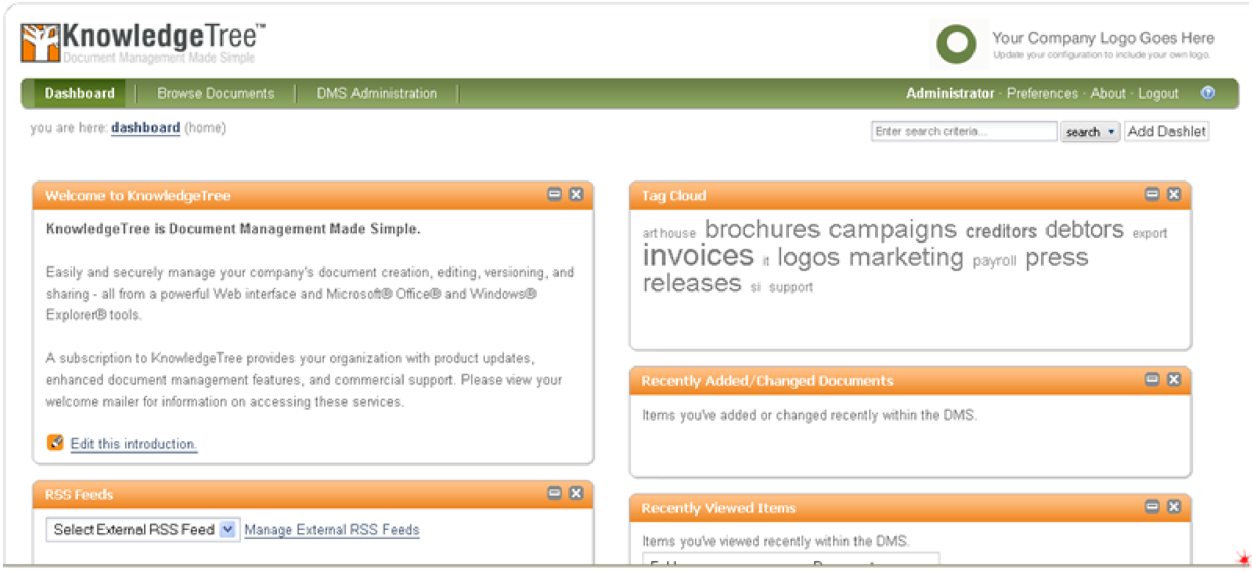
This screen provides information about your current KnowledgeTree installation - copyright, contact information for KnowledgeTree Sales, links to KnowledgeTree community resources, contributor credits, and links to third party software used in KnowledgeTree.



About KnowledgeTree

3.1 KnowledgeTree Dashboard

KnowledgeTree's Web-interface opens at the **dashboard**.



Admin user's Dashboard

Commercial Editions Only

Note: *Some dashlets are available only in KnowledgeTree Commercial Editions.*

Dashlets

KnowledgeTree uses the currently logged in user's credentials to determine the information that display on the **Dashboard**. Some dashlets are only visible to the administrator, providing information on system specific tasks, resources, and statistics.

- **Welcome ...** - an editable welcome message.
- **Your Checked-out Documents** - a list of documents checked out by the current user. **Commercial Editions Only**
- **Document Indexer Statistics** - provides statistics on the status of document indexing; a diagnostic function allows you to check that the correct version of documents are indexed, and to re-schedule indexing if necessary. Displays the number of documents that have been indexed, and the number of documents still in the indexing queue. This dashlet also informs you if there is an error with the Indexer, whereas the Text Extractor Diagnostics dashlet will provide a detailed explanation.
- **Text Extractor Diagnostics** - displays only when it detects an error. This function checks that the Indexer and the Text Extractors are working, and informs you which Text Extractors are not working. For example, it would allow you to see why your PDF documents are not being indexed, even though your Word documents are being indexed. Results may be obtained by running the following script: search2/indexing/bin/diagnose.php script
- **Orphaned Folders** - lists any folders that you won't be allowed to navigate to through the folder structure because you do not have view permissions on the parent folder. You can

use the orphaned folder link to go directly to the folder, but you won't be able to access any other folders at this location.

- **RSS Feeds** - lists your existing RSS Feeds on external content (blogs, external websites, etc.) and displays a full view of your RSS feeds on internal content, plus a link to the RSS Feeds management interface.
Note: *See the **KnowledgeTree User Manual** for information on working with KnowledgeTree's RSS Feeds functionality.*

- **Storage Utilization -** displays information on file system mount, total storage space, used and available storage space.

- **External Resource Dependency Status -** displays an error report, only when errors are detected with KnowledgeTree's external resources (Document Indexer and OpenOffice).

- **Go to Document ID** - Use this dashlet to enter a document id; then, go directly to that document in the repository. **Commercial Editions Only**

- **Recently Viewed Items** - lists the documents and folders last viewed by the currently logged in user. **Commercial Editions Only**

- **Quicklinks** - displays predefined links to frequently used items. **Commercial Editions Only**
Note: *See the **KnowledgeTree User Manual** for information on Adding Quicklinks.*

- **Tag Cloud** - displays tags defined by all system users. Click on a tag to display a permissions-based list of content associated with a selected tag.
Note: *See the **KnowledgeTree User Manual** for information on adding and using tags.*

- **WebDAV Connection Information** - instructions for connecting to the WebDAV server.

- **System Folder Utilization** - lists system folders used by KnowledgeTree, the path to the folder, the space used by each folder. A 'cleanup' link adjacent to each folder clears the tmp, cache, and log directories, and may be used when the file size of temporary files affect system performance.

- **Document Indexer Status** - provides information on the Document Indexing Service.

- **Top Downloads** - displays a permissions-based list of the seven most downloaded documents in your organizational DMS. **Commercial Editions Only**

- **Recently Added/Changed Documents** - displays a permissions-based list of the five most recently added or modified documents in the system.

- **License** - displays only when your license has expired. **Commercial Editions Only**

- **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.

- **Mail Server Status** - displays only until you configure emailing on the KnowledgeTree server.

- **My Dropped Documents** - displays only when you are using KnowledgeTree Drop Box, and lists the five most recently uploaded documents through KnowledgeTree Drop Box.

3.1.1 Customizing Dashboard Welcome Text

This procedure customizes the text in the Dashboard **Welcome ...** dashlet.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface. By default, KnowledgeTree opens at the Dashboard.

2. **Do you want to ...**

   - **expand, minimize, or hide the dashlet?** Click the ***minimize*** / ***maximize*** icons to display or hide text; click the ***close*** icon to temporarily remove the dashlet.

   - **customize text?** Click ***Edit this introduction*** to open the Help editing screen. Make the required changes; then, click ***Update***.
     Note: *The customized page is added to the* ***Current help assignments*** *page, and the new text is updated in the* ***Welcome ...*** *dashlet on the Dashboard.*

   - **revert to the standard Welcome text?** Click ***Use the standard introduction***.

   - **move the dashlet to another position on the Dashboard?** Click on the Dashlet; then, hold the mouse button down while dragging the dashlet to the desired location on the page.

3.1.2 Disabling the Ajax Dashboard

This procedure disables KnowledgeTree's Web interface Ajax dashboard.

Note: *The Ajax dashboard allows users to drag the dashlets to alternate positions on the dashboard, thus creating a custom view of the dashboard. The default setting is 'True', which enables the Ajax dashboard by default.*

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **DMS Administration - System Configuration - General Settings**.

2. In **General Settings**, locate the **KnowledgeTree** section; then, change the value in the **Use AJAX dashboard** setting to *False*.

3. Click ***Save Config Settings***.

3.1.3 Adding New Custom Dashlets

Please refer to the tutorial on the KnowledgeTree Wiki for instructions on how to create a basic dashlet: http://wiki.knowledgetree.com/Basic_Dashlet_Tutorial

3.2 Using Search

The ability to retrieve documents and folders quickly and efficiently is an important function of an electronic document management system. 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.

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***.

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 Search Criteria Editor.

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

3. Now 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*

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:

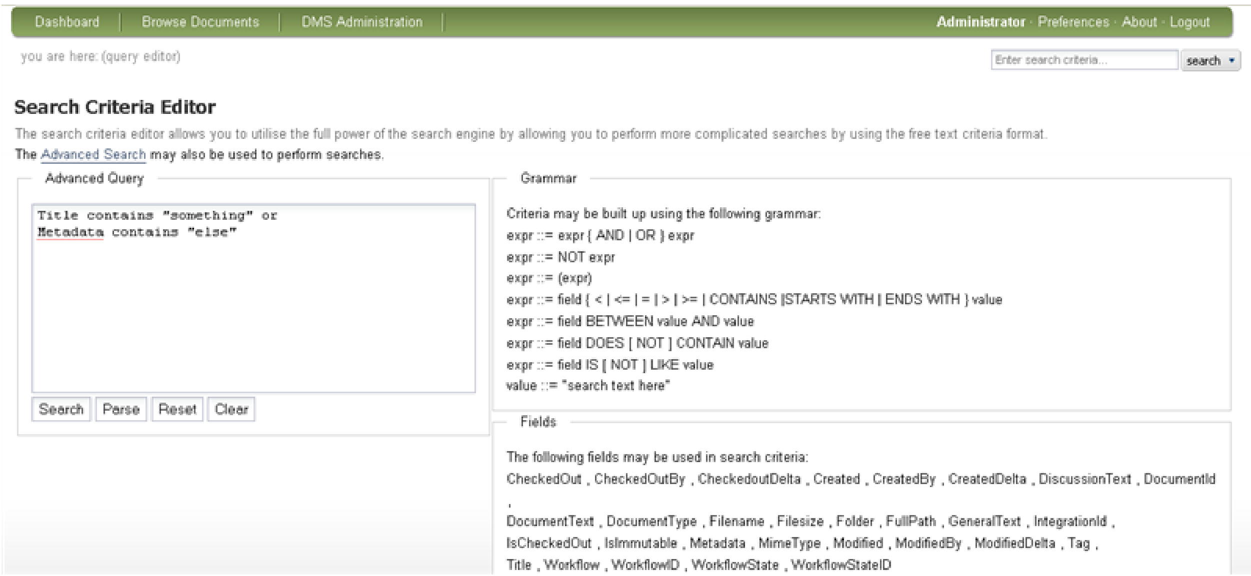
- edit or delete a saved search
- create a new search
- share a saved search (if this option is available)
- run a saved search

See Also:

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

3.2.1 About Advanced Search Queries

KnowledgeTree's 3.5.x Web interface provides a **Search Query Builder** that allows you to create powerful search queries, or 'expressions', which are based on a predefined set of search query rules, or search 'grammar', and a predefined list of usable fields.



The Search Query Editor

Search queries are defined in the Search Query Builder's text screen in KnowledgeTree's Web interface, and are used to search the KnowledgeTree document repository via Web Services.

You may build optimized search queries containing a single grammar element (e.g. **expr {AND | OR} expr**), or two or more grammar elements (e.g. **NOT expr {AND | OR} expr**).

In this example two grammar elements are combined to build a single search query:

- expr {AND | OR} expr
- NOT

Search Expressions

Use the following grammar to build search expressions:
expr ::= expr { AND | OR } expr
expr ::= NOT expr
expr ::= (expr)
expr ::= field { < | <= | = | > | >= | 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"

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

A 'field' may also refer to metadata using the following syntax: ["fieldset name"]["field name"]

Note: *'Values' must be contained within double quotes, i.e. " ... ".*

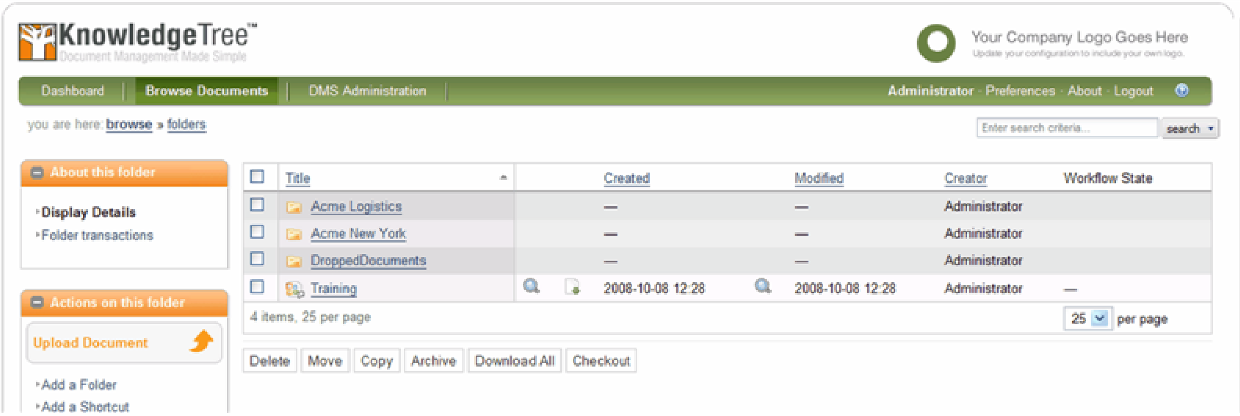
Example Expressions

- Title contains "contract" and filesize <= "10000"
- Filename ends with ".doc" and (title starts with "ENG" OR filename starts with "ENG") OR WorkflowState = "Draft"
- ["Invoice"]["InvoiceNo"] starts with ("ENG", "INV") is equivalent to: (["Invoice"]["InvoiceNo"] starts with "ENG") or (["Invoice"]["InvoiceNo"] starts with "INV")
- DocumentText : "SECRET" is equivalent to: DocumentText contains "SECRET"

3.3 Browse Documents

This chapter provides information on the administrative tasks that may be performed in **Browse Documents**:

Note: *Most administrative tasks are performed in DMS Administration. For user-level information about working in Browse Documents, see the KnowledgeTree User Manual.*



Browse Documents

The Folder Actions Menu

The **Actions on this folder** menu displays in the folder view in Browse Documents and contains a permissions-based list of options, including:

- **Upload Document** - adds a new document to KnowledgeTree, to the currently selected folder.
- **Add a Folder** - adds a new folder to KnowledgeTree, within a currently selected folder.
- **Add a Shortcut** - adds a shortcut to a folder or document from your current folder location
- **Allocate Roles** - adds users or groups to a predefined role for the purpose of giving the permissions of the role to these users and/or groups on a currently selected folder
- **Bulk Download** - downloads all content in a currently selected folder, in a zipped folder, to your local computer, and displays the path and size of each document

- **Bulk Upload** - uploads a zipped file from your local computer or network into the currently selected folder in the repository

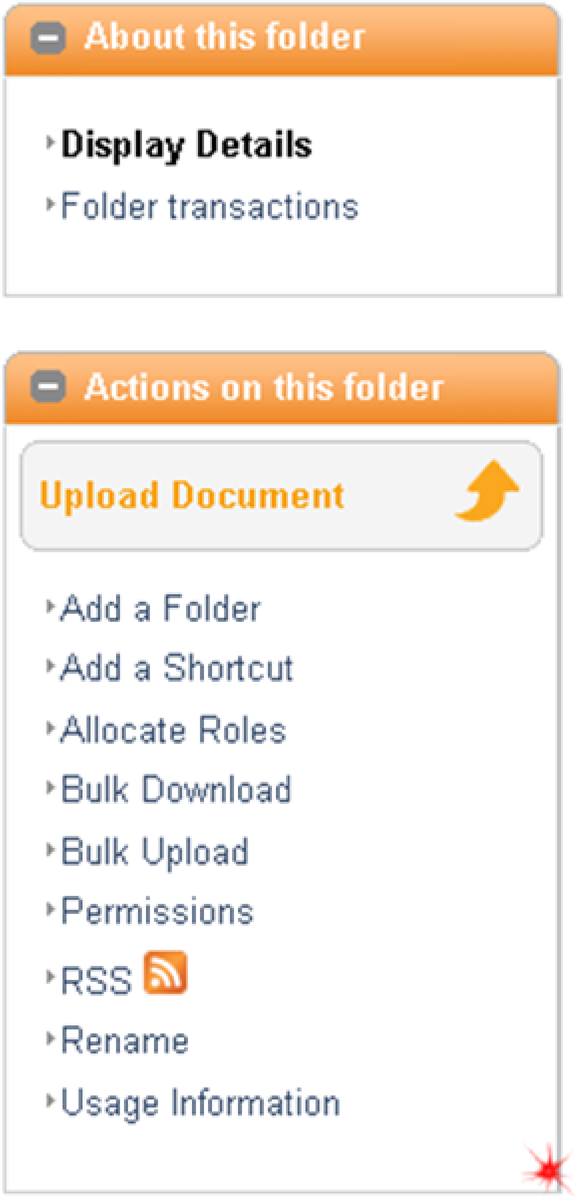
- **Import from Server Location** - uploads all content from a defined server location to the currently selected folder in the repository. You may define the following metadata information on this content during the import action: document type (and add values for each field associated with the selected document type), tag clouds, category, media type (e.g. audio, image, text, video), and add values for any generic fields created for your repository ('generic' fields are applicable on all document types, e.g. document author).

- **Permissions** - allows you to view or modify permissions on the currently selected folder

- **RSS** - generates a link for the currently selected folder. Copy the link into your RSS aggregator to create a feed to the currently selected folder.

- **Rename** - allows you to rename a currently selected folder

- **Usage Information** - generates reports on content in a currently selected folder: view activity per user on the folder, view general activity reports, or view a summary of documents in the folder, by workflow and by document type.



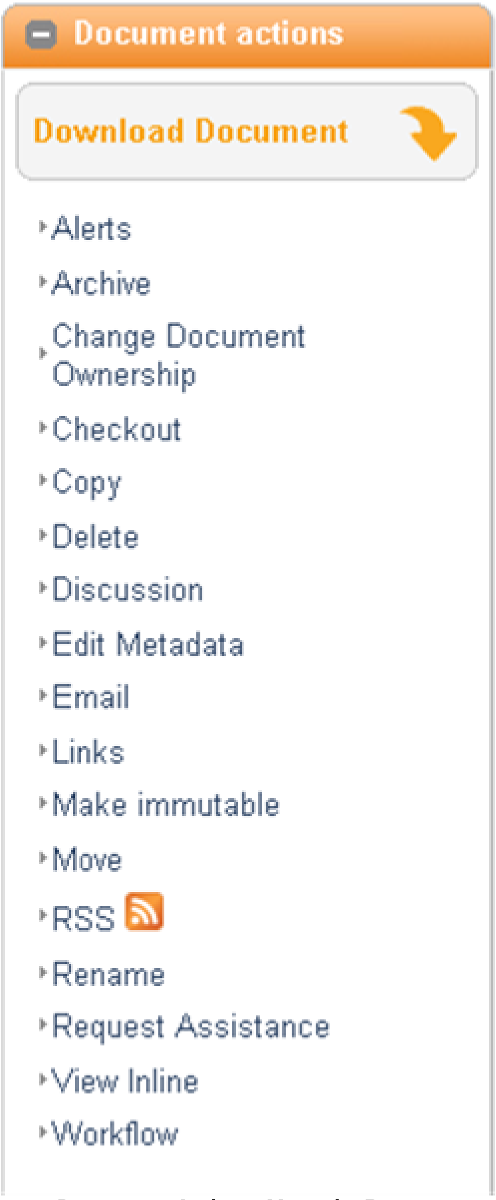
Folder Menu in Browse Documents

The Document Actions Menu

The **Document Actions** menu displays when you have opened a document at its Document Details page in **Browse Document**, and provides document level functionality for working with content in the KnowledgeTree repository.

To ensure that all functionality is enabled, please read and update the plugins from the file system after installing or upgrading KnowledgeTree.

For more information on using the Document Actions, please refer to the **KnowledgeTree User Manual**.



Document Actions Menu in Browse Documents

3.3.1 Viewing Folder Contents

This procedure displays the contents of a folder and folder details, and provides access to actions on the folder.

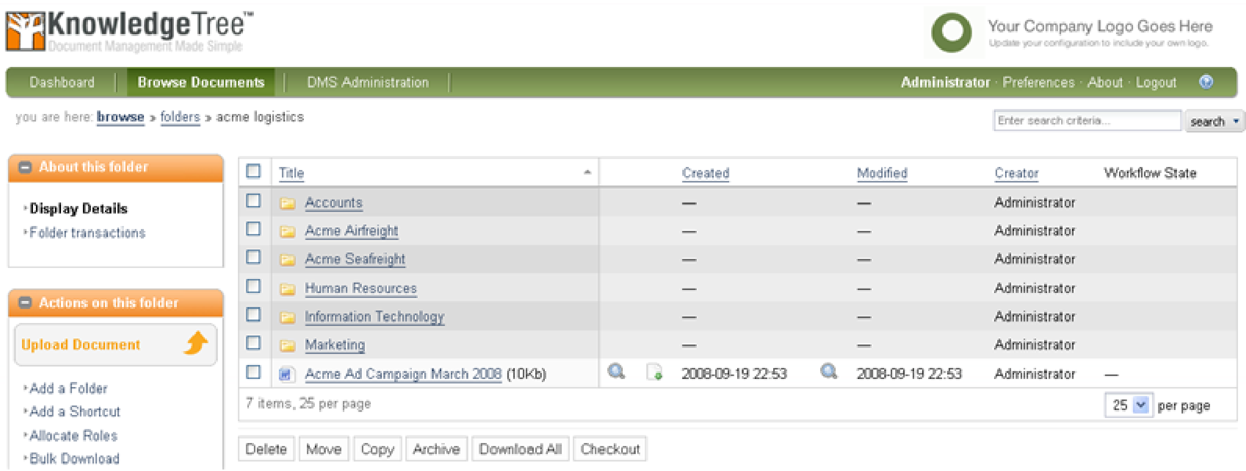
Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, click **Browse Documents** to enter the folder structure.

2. The default view in **Browse Documents** displays the content of the root folder (those folders and documents for which you have at least the 'read' permission). To view the content of another folder, navigate to the folder through the folder structure, or search for

the folder. The following information is displayed for each item in the currently selected folder:
- Title
- Date created
- Date last modified
- Name of the user who added the folder or document to the system
- Workflow state, if applicable

The following actions may be performed on folders and documents in this view (depending on your permissions):
- Delete
- Move
- Copy
- Archive
- Download
- Checkout



View Folder Content

3.3.2 Viewing Folder Transactions

This procedure displays the transactions that have occurred on a currently selected folder.

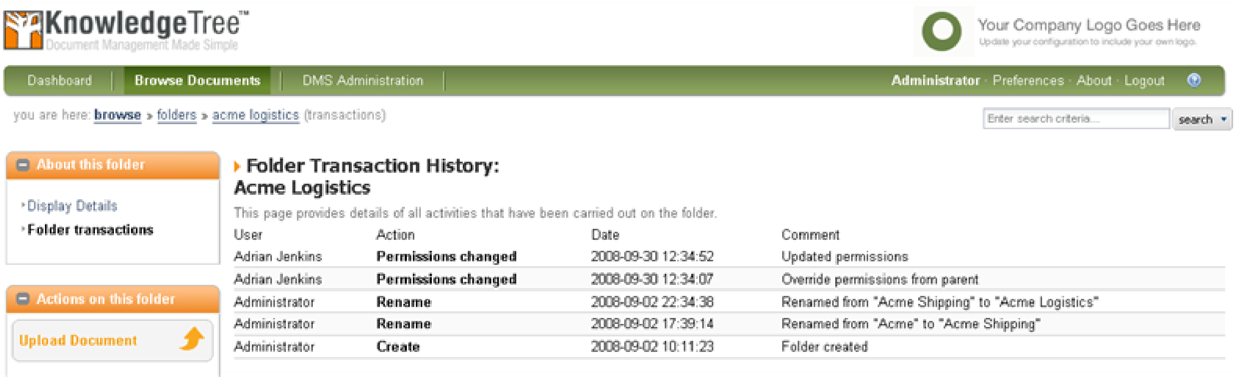
Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **Browse Documents**.

2. Locate the folder for which you want to view folder transactions - navigate to the folder through the folder structure in **Browse Documents**, or search for the folder.

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

4. Transactions that have occurred on the folder are displayed on the page, with the following details:
   - the username of the person who performed the action
   - the type of action
   - the transaction date
   - the reason (comment) provided for the action



View Folder Transaction History

3.3.3 Enabling and Disabling Administrator Mode

This procedure enables and disables administrator mode in KnowledgeTree's web interface.

⊟ What is Administrator Mode?
Administrator mode is a system state that allows KnowledgeTree administrative users to override the permissions system, in an audited fashion, in order to access all documents in the system, and to perform actions that are typically not allowed when administrator mode is disabled, such as deleting a Unit folder.

With administrator mode enabled, Unit Administrators are allowed access to all documents in their Unit, but not on all documents throughout the system, i.e. outside of the Unit where they have administrative privileges.

Administrator mode provides an audited method of fixing errors on documents or in folders where even administrative users are usually denied access, such as content containing classified information.

Note: *Even with Administrator mode enabled, system administrators are not allowed to delete* ***immutable*** *documents using the* ***Delete*** *button in* ***Browse Documents****. Immutable documents can only be deleted using the* ***Delete*** *action on their* ***Document Detail*** *page. This ensures that immutable documents are only deleted one at a time, and avoids the mistaken deletion of an immutable document in a mass action delete.*

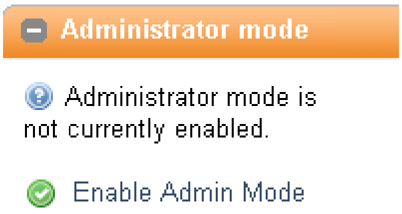
Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **Browse Documents**.

2. Scroll down on the page to locate the **Administrator mode** menu; then, click the ***maximize*** icon to expand the **Administrator mode** menu.

3. **Do you want to ...**
   - **enable administrator mode?** Click ***Enable Admin Mode***.

   - **disable administrator mode?** Click ***Disable Admin Mode***.



Administrator Mode Menu

3.3.4 Viewing / Editing Folder Permissions

This procedure displays and edits permissions on a folder.

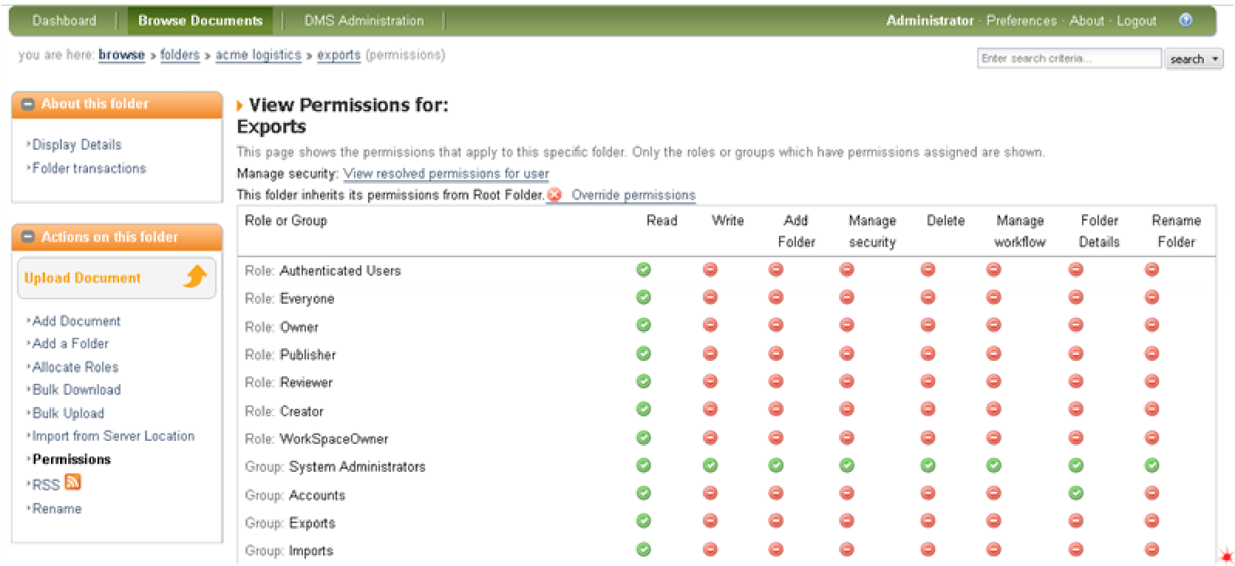
Note: *KnowledgeTree uses document permissions, whereas file permissions are an operating system construct. File permissions define which files the operating system users are allowed to access on the file-system. File permissions do not map to document permissions within KnowledgeTree - there is no relation between these two concepts. Find out more about KnowledgeTree's permissions system.*

Note: *Typically, only an administrator edits folder permissions, although users may also be granted the permission to do so.*

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, search or browse to the folder where you want to view or edit permissions.

2. Click ***Permissions*** in the **Actions on this folder** menu to open the **View Permissions for [folder name]** page, where you can view the current permissions set up on the folder. The default view is to view permissions by role and by group.



View folder permissions by role and by group

3. **Do you want to ...**

   - **view the permissions of individual system users on this folder?** Click ***View***

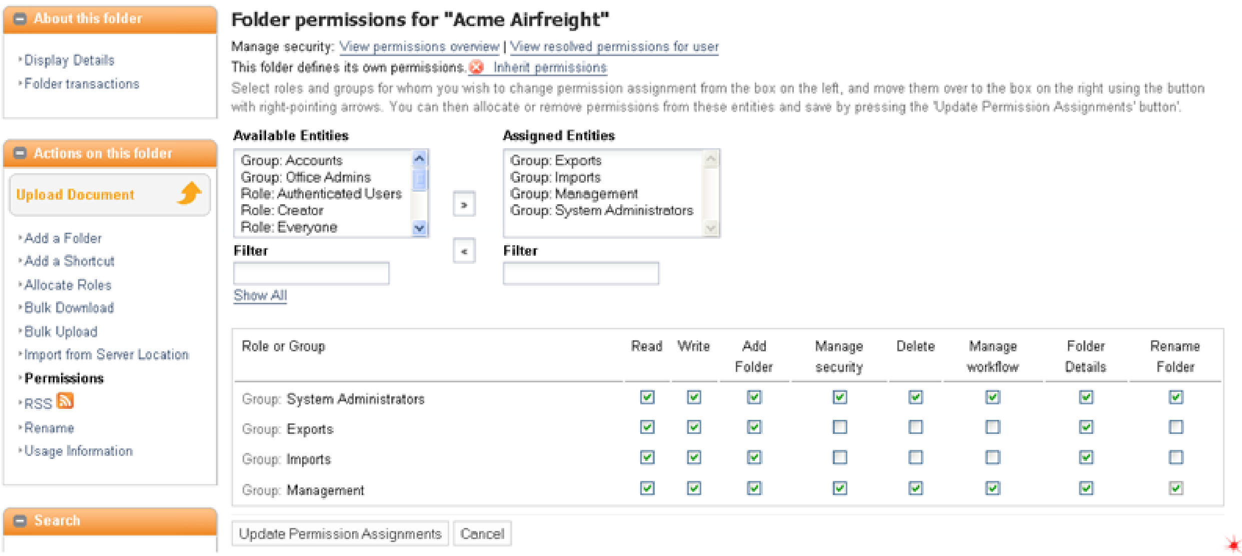
resolved permissions for user. Review the list of users onscreen. Note whether the user is part of a role or a group. To change the permissions on this folder for a particular user, you will need to change the permissions of the user's group or role.

- **override inherited permissions?** Click ***Override permissions***.
What are Inherited Permissions?Permissions set up on a folder automatically pass down to its sub-folders, or child folders. Sub-folders thus 'inherit' their permissions from the higher level folder, or parent. To assign custom permissions to the child folder, 'inherited permissions' can be overridden, or reinstated as required.

- **reinstate the permissions of the parent folder?** Click ***Inherit permissions***. Click ***OK***.

- **edit permissions on the folder (existing permissions display in the table)?** Click ***Edit permissions*** to open the permissions editing screen. Add / remove roles and/or groups from the **Assigned Entities** field to define the groups and roles for whom you are configuring permissions on this folder. Select or deselect check boxes in the table for each permission (relevant to the role or group) to define permissions on the folder. Click **Update Permission Assignments**.

- **add or remove dynamic permissions on this folder?** Select a group and condition in the **Add a new dynamic permission** section; then, select the relevant permissions check boxes; to remove a dynamic permission, click the **delete** icon in the **Remove** column for the relevant group in the **Dynamic permissions** table.



Editing Folder Permissions

3.3.5 Assigning / Editing Roles

This procedure assigns and edits the roles that have permissions on a selected folder.

What are Roles?

Prerequisite:

- Add the relevant roles

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, locate the folder where you want to allocate roles - search for the folder or navigate to the folder through **Browse Documents**.

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

3. **Do you want to...**

   - **remove the parent allocation on a role?** Click **Override Parent Allocation** for the relevant role.
     __Note:__ This action creates a new, editable, role allocation - i.e. the __Edit__ icon displays in the __Edit Users__ column, and in the __Edit Groups__ column.

   - **reinstate the parent allocation on a role?** Click the icon in the **Use Parent** column for the relevant role. Click **OK** on the system verification message.

   - **add or remove users for this role?** Click the **Edit** icon in the **Edit Users** column for the relevant role to open the **Allocate User to Role** page; then, populate the **Member users** field with one or more users from the **Available Users** field; remove users from the role by moving their user name to the **Available Users** field. Click **save changes** when you're done.

     __Note:__ To find relevant users fast, enter criteria in the __Filter__ fields (i.e. type a letter, or a word, or the first part of a word) to display names matching the criteria at the top of the display field.

     __Note:__ To select several names at once, hold down the keyboard __Ctrl__ key while selecting names; then, to populate the other field, you can either double click on your selection or use the arrows to move the names.

   - **add or remove groups for this role?** Click the **Edit** icon in the **Edit Groups** column for the role to open the **Allocate Groups to Role** page; then, populate the **Member groups** field with one or more users from the **Available Groups** field; remove groups from the role by moving the group name to the **Available Groups** field from the **Member groups** field. Click **save changes** when you're done.

     __Note:__ To find relevant groups fast, enter criteria in the __Filter__ fields (i.e. type a letter, or a word, or the first part of a word) to display the names matching the specified criteria at the top of the display field.

     __Note:__ To select several names at once, hold down the keyboard __Ctrl__ key while selecting names; then, to populate the other field, you can either double click on your selection or use the arrows to move the names.

3.3.6 Importing Content from a Server Location

This procedure performs a bulk upload of all content at a specified server location.

Note: *Only administrative users have access to this functionality in the DMS.*

Note: *Check the community Wiki (specifically, Best Practice for Bulk Uploads) for the latest tips on uploading a large number of files.*

Perform the following steps:

1. Use your KnowledgeTree administrator credentials to log in to the web interface; then, open **Browse Documents**.

2. Navigate to the destination folder for imported content; then, click ***Import from Server Location*** in the **Actions on this folder** menu to open the **Import files into [folder]** page.

3. Specify the path to the source server for the content you're importing.

4. Select a document type; then, click ***Add***.

5. Complete the metadata fields that display for the selected document type - e.g. author, category, keywords etc.
   Note: *The administrator defines custom fieldsets and fields for document types.*

6. Add tags in the **Tag Words** field.

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

3.3.7 Bulk Exporting Folder Content

This procedure downloads the entire content of a folder in a zipped file. The zipped file is saved to the user's computer and may be opened locally for viewing.

Note: *The bulk export functionality is only available to an administrative user.*

Pre-requisite:

- You need to have enabled the Bulk Export plugin for your KnowledgeTree installation.
- You need to have permissions for this action on the folder.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, locate the folder where you want to export bulk content - search for the folder or navigate to the folder through the folder structure in **Browse Documents**.

2. In the **Actions on this folder** menu, click ***Bulk Export***.
   Note: *This menu item does not display if you do not have permissions for this action on the folder.*

3. Choose whether to open the zipped file or save it to your local computer; then, click ***OK***.

3.3.8 Bulk Uploading a Zipped Folder

This procedure uploads multiple documents in a zipped archive folder.

Note: *Check the community Wiki (specifically, Best Practice for Bulk Uploads) for the latest tips on uploading a large number of files.*

Supported compression formats

KnowledgeTree supports the following compression and archive formats:

- Zip (.zip)
- Unix archiver (.ar)
- GZip or GNU Zip (.gz)
- Tape Archive (.tar)
- Tape archive and gzip - used together (.tar.gz and .tgz)
- .deb (generally used for Debian packages)

Note: *Although Bzip2 (.bz2) is supported, this requires a php library that isn't currently in the stack, but may be in included in future releases.*

Supported extensions

- tgz
- tar
- gz
- zip
- deb
- ar
- tar.gz

Prequisites:

- You need to have Unzip installed on the KnowledgeTree server - *Windows: http://www.info-zip.org/; Unix / Linux: unzip*

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, locate the destination folder where you want to upload bulk content - search for the folder or navigate to the folder through the folder structure in **Browse Documents**.

2. In the **Actions on this folder** menu, click **Bulk upload**.
   Note: *This menu item does not display if you do not have permissions for this action on the folder.*

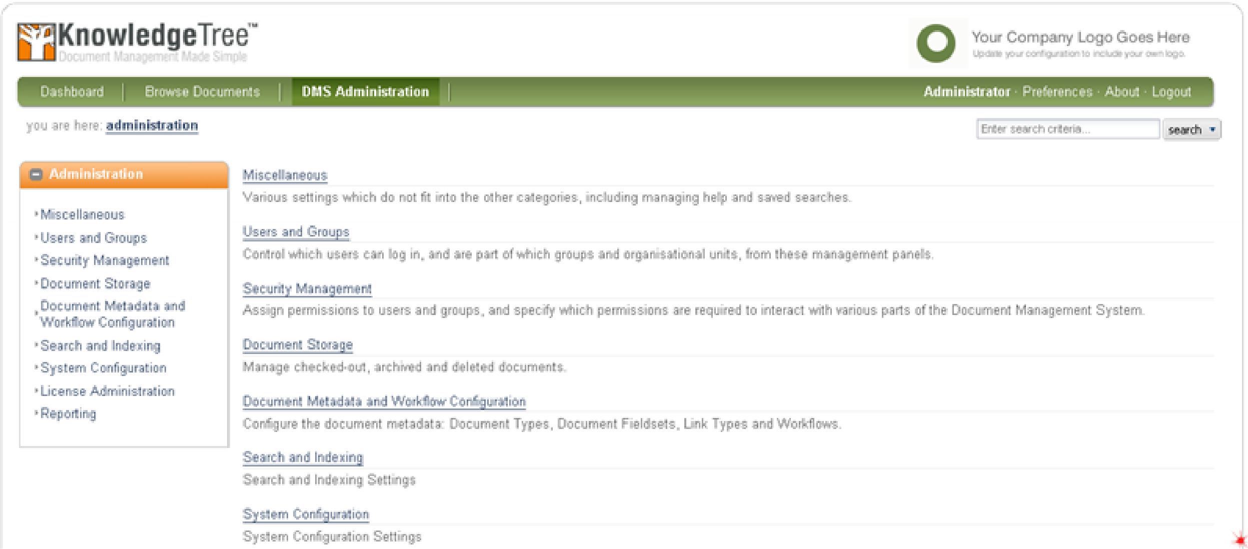
3. Specify the path to the file in the **Archive** file field; or, click **Browse** to navigate to the archive file.

4. Select a document type; then, click **Add.**

5. Metadata fields relevant to the document type display on the page; complete these fields; then, click **Upload**.

3.4 DMS Administration

This topic describes the tasks performed in DMS Administration, per section.



DMS Administration Module

⊟ Miscellaneous

- Add and edit dashboard Quicklinks

Note: *The Quicklinks feature is available in KnowledgeTree Commercial Editions. A community version of this feature is available at the KnowledgeTree Forge.*

- Add, edit, and remove custom disclaimer text on the Login screen and as Footer text in KnowledgeTree's web interface

- View extended transaction reports on user activity in KnowledgeTree - by user, by date, and by transaction type

Note: *Transaction Reports are only available in KnowledgeTree Commercial Editions.*

- Add customized Help files (editing a default file adds a new Help page), and view, edit, and delete existing customized Help pages

- Read plugins from the file-system, and enable or disable plugin functionality in your KnowledgeTree installation

- Configure scheduling (frequency and next run time) for the following tasks: indexing, index optimization, periodic document expunge, database maintenance, OpenOffice test, clean up the temporary directory, disk usage and folder utilization statistics, refresh index statistics, refresh resource dependencies, document alerts

- Access support, and download system information in a zip archive (for diagnostic purposes)

- Configure the columns to display in Browse Documents and in Search results

⊟ Users and Groups

- Add, edit, and delete external authentication sources and authentication providers, if required in your installation

- Manage groups - search for groups (locate a specific group or view all groups in the system), delete groups, edit groups (change the name of the group, allocate Unit Administrator rights and/or System Administrator rights to the group, assign the group to a Unit, add or remove users in a group, add or remove subgroups in a group

- Manage Units - add new Unit folders to a selected folder location, edit the Unit name, delete a Unit, use the Unit folder location link to open the Unit at its folder location

- Manage users - add new users (manually, or from an external authentication source), view one or all system users, enable or disable users, delete users, edit user details (change the user's personal details, including username and password), add users to groups and remove users from groups,

Security Management

- View existing permission types and add new, custom permission types

- View, edit, and delete existing roles, and add new roles

- Configuring Dynamic Permissions

Document Storage

- Override a check-out to restore a document to KnowledgeTree when a user has failed to check the document back in
- Restore archived documents
- Restore or expunge deleted documents
- Run a database consistency check to verify the contents of the database against content in the KnowledgeTree repository

Document Metadata and Workflow Configuration

- View, edit, and add document types
- Enable and disable document types
- Associate fieldsets with document types, and remove associations
- View existing fieldsets and add new fieldsets
- Edit and delete fieldsets
- Set up conditional fieldsets
- View and add fields
- Edit and delete fields
- View and add Email document types
- View existing workflows and add new workflows
- Copy workflows
- Edit a workflow process and workflow details
- Add and edit workflow transitions
- Add transition restrictions, and view/edit and delete existing transition restrictions
- View, edit, delete, and add transition effects
- Add and edit workflow states
- Configure workflow security
- Add and edit notifications on workflows
- Configure custom document numbering schemes
- Configure document links
- Enable and disable automatic assignment of workflows
- Allocate workflows to document types

Search and Indexing

- View supported mime types and extensions
- View a list of text extractors and their supported mime types and extensions
- View a list of documents where problems have occurred during indexing and reschedule indexing on selected documents
- View a list of documents in the indexing queue
- Re-index your entire repository

System Configuration

- View and edit server settings, Client Tools policies, WebDAV, and the OpenOffice.org service
- Configure emailing on the KnowledgeTree server
- Configure the KnowledgeTree cache
- Configure custom error message handling
- Configure disk usage threshold percentages, define the location of the zip binary and paths to external binaries
- Configure LDAP authentication, session management, the KnowledgeTree storage manager, miscellaneous tweaks, and whether to always display the 'Your Checked-out Documents' dashlet
- View and modify the default language for the interface
- View and modify the number of documents indexed and/or migrated in a cron session, core indexing class, paths to the extractor hook, text extractors, indexing engine, Lucene indexes, and the Java Lucene URL
- View and modify search date forma, paths to search, indexing fields and libraries, results display format, and results per page
- Configure the KnowledgeTree user interface

License Administration

- Install your KnowledgeTree Commercial license
- View existing licenses

Reporting

- Generate user activity reports

3.4.1 Managing Quicklinks

This procedure adds, edits, and deletes the Quicklinks that display on the KnowledgeTree web interface dashboard.

⊟ What are Quicklinks?
Dashboard **Quicklinks** provide direct access to any document in the repository - this is useful if the document is frequently viewed (a telephone list, for example), or if you want to draw attention to a specific document, such as important procedures and policies. The user clicks a link on the Dashboard to go directly to the location of the document in the repository.

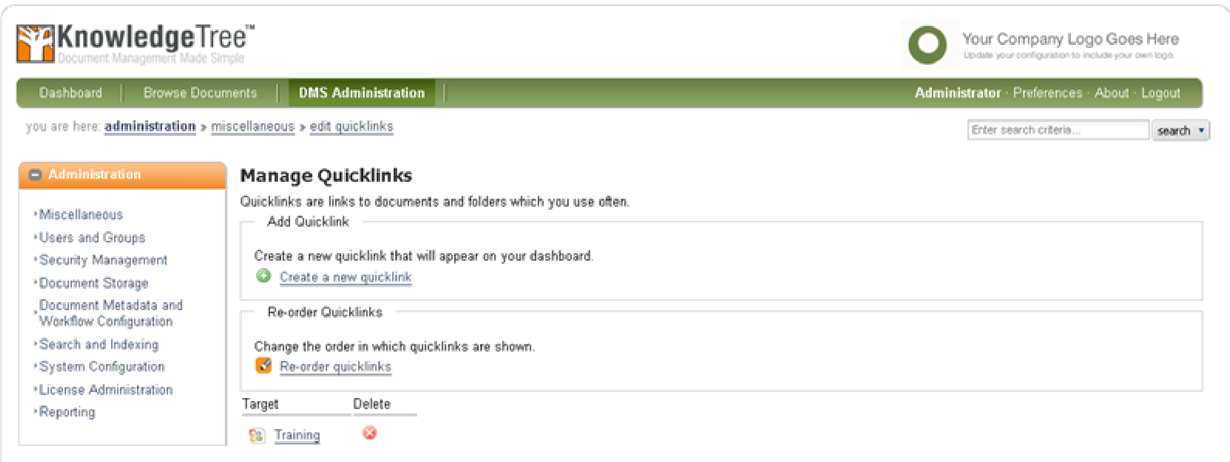
Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, click **DMS Administration - Miscellaneous - Edit Quicklinks** to open the **Manage Quicklinks** page.

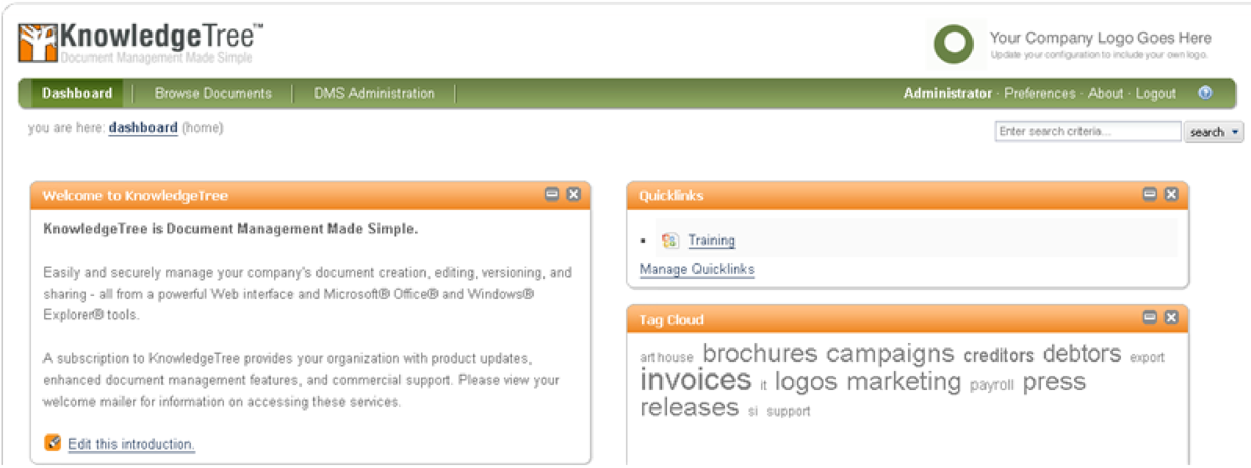
2. **Do you want to ...**
   - **add a new quicklink?** Click ***Create a new quicklink*** to open the **New Quicklink** page. Browse the folder structure to the target document; then, select the radio button adjacent to the document. Click ***Link*** to create the link to this document. The system re-opens **Manage Quicklinks**, where you can view the link you added.

   - **remove an existing quicklink?** View the list of existing quicklinks at the bottom of this page; then, click the ***Delete*** icon for the relevant link.

   - **change the way existing links are currently arranged on the dashboard?** Click ***Re-order quicklinks*** to open the **Re-order Quicklinks** page. View the displayed list of existing links; then, use the **Up** and **Down** arrow keys to change the order of links. Click ***Re- order*** to save your changes.



Add and Edit Quicklinks



Quicklinks on the Dashboard

3.4.2 Adding / Editing Disclaimers

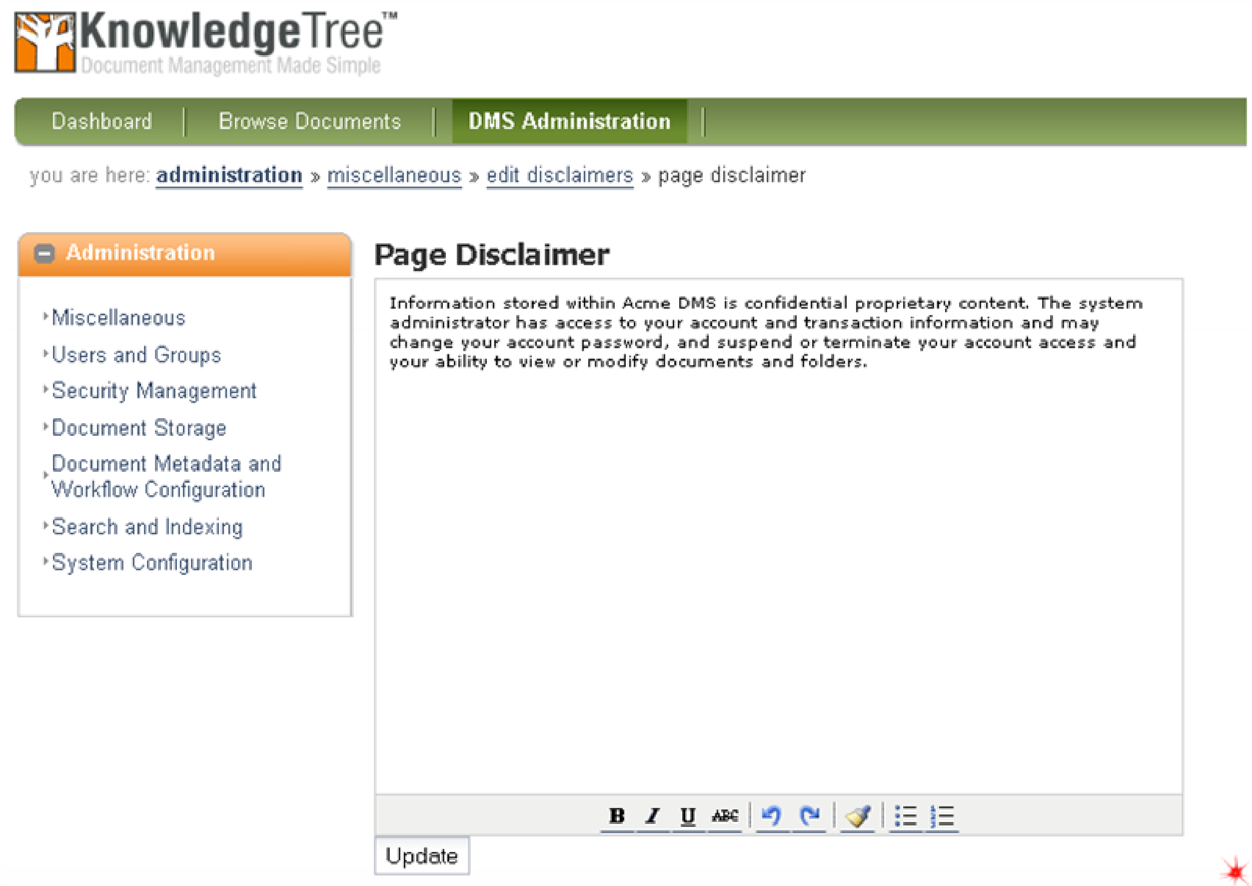
This procedure adds, edits, and removes custom disclaimer notices on the web interface of your KnowledgeTree installation. Customized disclaimer notices may be added to the Login page, and as footer text in the web interface.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then go to **DMS Administration - Miscellaneous**.

2. Click ***Edit Disclaimers*** to open the **Disclaimers** page.
   - To add new disclaimer text or edit existing text, click ***Edit*** in the **Actions** column for the relevant disclaimer type (Login page or Footer). On the editing screen, make the required changes; then, click **Update**.

   - To remove existing disclaimer text, click ***Clear*** in the **Actions** column for the relevant disclaimer. The custom disclaimer text is removed.



Edit Page Disclaimers

Custom disclaimer added to the Login page

3.4.3 Generating Transaction Reports

This procedure generates reports on activity in KnowledgeTree web interface - by user, and by date and type of transaction.

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

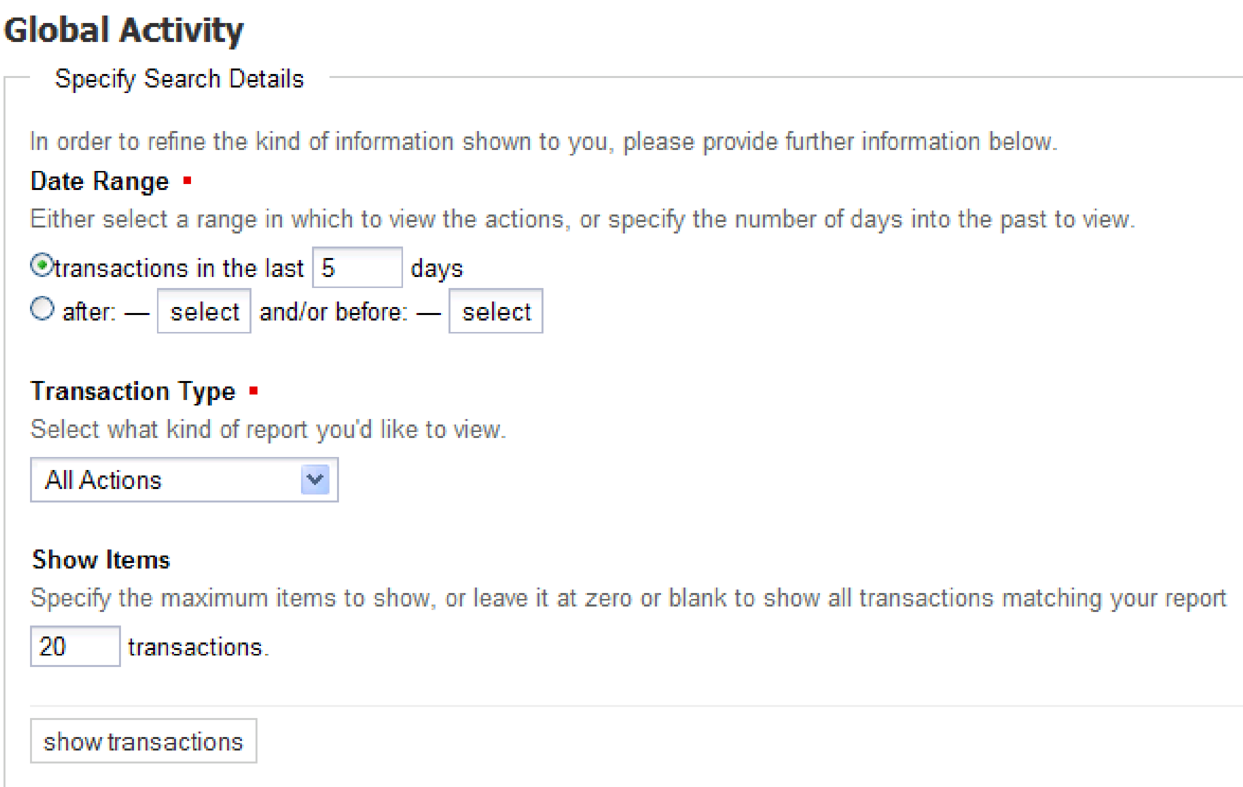
Perform the following steps:

1. Use your administrative credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration** - **Miscellaneous** - **Extended Transaction Reporting** to open the **Extended Transaction Reporting** page.

2. **Do you want to generate a transaction report ...**

   - **by user?** Click **User Activity Information** to open the **Select User** page. Type the user's name or part of the name in the **Username** field; then, click **search for users** to display search results. Click the **View Transactions** link for the relevant user to further define the following criteria for this user on the **User Information** page: **Date Range**, **Transaction Type**, **Show Items** (maximum number of items to display). When you're done, click **show transactions**.

   - **by date and transaction type?** Click **Global Activity Information** to open the **Global Activity** page. Define the following criteria on this page: **Date Range**, **Transaction Type**; **Show Items** (maximum number of transactions). When you're done, click **show transactions**.



3.4.4 Adding / Editing Custom Help Files

This procedure displays, edits, and deletes existing customized onscreen Help files and adds new custom Help files.

Note: *KnowledgeTree provides several inbuilt, customizable Help files. Customizing a Help file creates a new file that replace the default file. Deleting a custom Help file restores the default Help file. Non-administrative users have view-only access to the Help file.*

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **DMS Administration - Miscellaneous - Edit Help Files** to open the **Current help assignments** page.

2. **Do you want to ...**

- **customize an existing onscreen Help file?** Locate the relevant existing Help file in the web interface; then, click the help icon on the toolbar to display the file. Click ***Edit this help page***. Make the required changes in the file; then, click ***Update***. The default file is removed from the interface and your custom Help file displays. Custom files are managed in **DMS Administration - Miscellaneous - Edit Help Files**.

- **view existing customized Help files?** View the displayed list of files in the **Existing customized help pages** section on this page.

- **edit a help file?** Click on the help file name in the **Name** column in the table. Make the required changes; then, click ***Update***.

- **delete a help file?** Click ***Delete*** in the **Action** column for the relevant help file.

Note: *Deleting a customized Help file restores the default Help file.*

3.4.5 Managing Plugins

This procedure reads any new plugins added to the KnowledgeTree plugin directory, updates the plugins list on the web interface Plugins management interface, and enables and disables plugin functionality in your KnowledgeTree installation.

⊟ What are Plugins?
Plugins are third party programs that provide extended functionality to KnowledgeTree.

When to read plugins from the file system
The plugins list must be read from the file system after installing or upgrading KnowledgeTree - rereading the plugins list ensures that any new functionality is available to system users.

See Also:
- Community contributed Plugins
- The Plugins Index - a description of each of the plugins currently used in KnowledgeTree

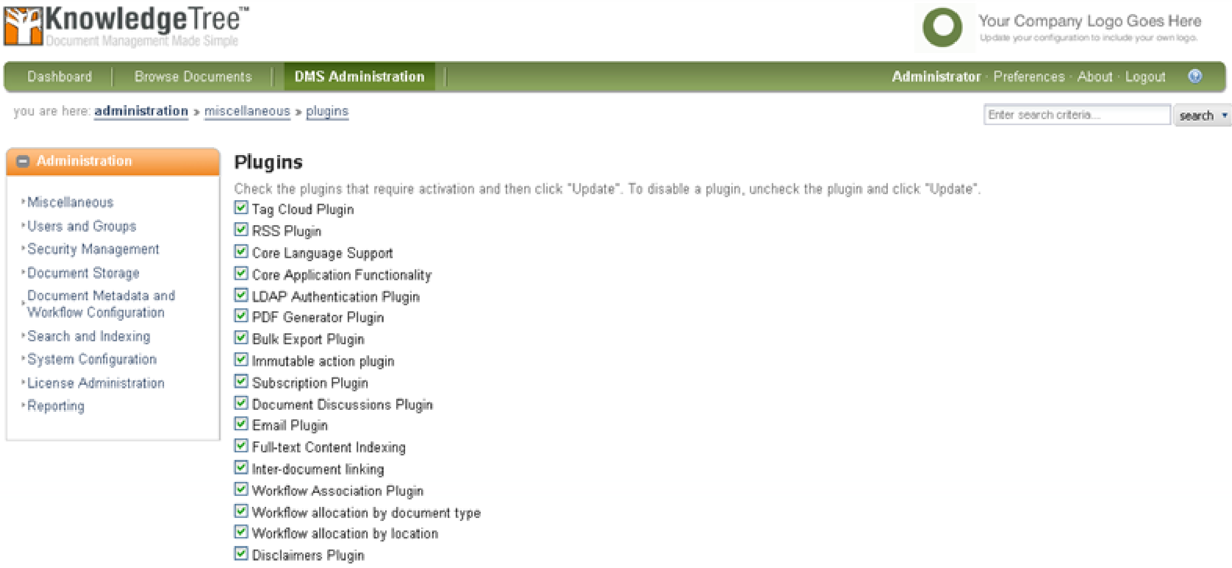
Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then go to **DMS Administration - Miscellaneous - Manage Plugins** to open the **Plugins** page.

2. **What do you want to do?**
   - **Read plugins from the file system.** Click ***Reread plugins***. New plugins are added to the list. Click ***Update***.

   - **Enable plugins.** Select the check box adjacent to each plugin you're enabling. Click ***Update***.

   - **Disable plugins.** Deselect the check boxes for any plugins you're disabling. Click ***Update***. Disabled plugins remain on the list and may be enabled at any time, provided the plugin is not removed from the plugin directory.



Enable Plugins

3.4.6 Managing Scheduled Tasks

This procedure defines and changes the frequency at which the scheduler runs background tasks, and enables or disables non-compulsory tasks.

⊟ Which tasks are configured through the Task Scheduler management interface?

Indexing - schedule how often indexing occurs in a recurring cycle.
Note: *Unless otherwise specified, only new documents are indexed at this frequency, according to a number of documents you have defined per indexing session. Typically, only new documents are indexed, unless indexing is set to re-index the entire repository. A high frequency is recommended as the DMS Search relies on efficient indexing. See* *Search and Indexing* *for more about defining Indexing rules.*

Index Optimization - optimizes the Indexer; creates a single file out of the multiple temporary files (fragmented data related to the Index) that are created and updated as content is added the Indexes.
Note: *Perform Index optimization regularly - typically once a day, or weekly, depending on how frequently the index is updated.*

Periodic Document Expunge - permanently removes all deleted documents.

Database Maintenance - a MySQL-specific database maintenance script that optimizes each table in the database.

Open Office test - checks that the OpenOffice service is running and restarts the service if it has stopped.

Cleanup Temporary Directory - a script that cleans up the multiple, temporary output files that OpenOffice creates when extracting text from various documents. This task is particularly important when KnowledgeTree is installed as the root user, and OpenOffice is running as the root user. In this case, the Apache user does not have permissions to allow the indexing scripts, which run under the Apache user, to clean up these temporary files.

Perform the following steps:

1. Use your administrator credentials to log into KnowledgeTree's web interface; then, go to **DMS Administration** - **Miscellaneous** - **Manage Task Scheduler**.

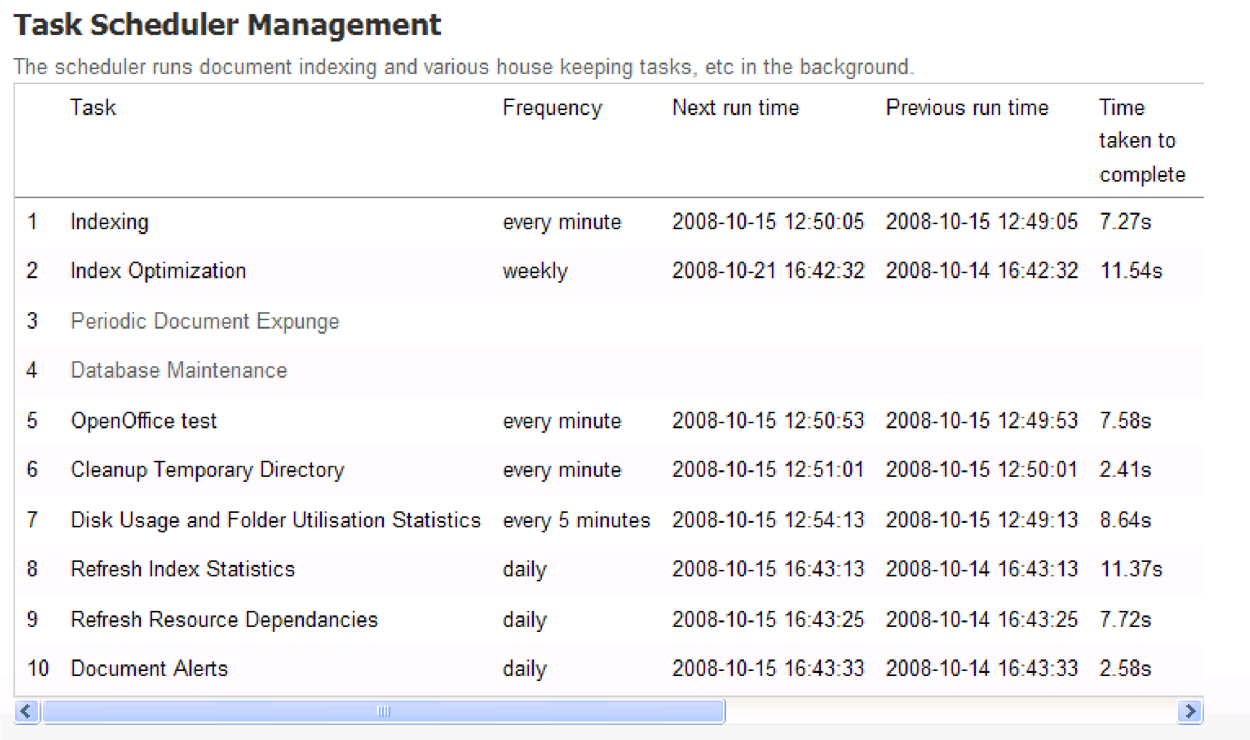
2. View the list of tasks on the page; then, locate the task you want to configure:

   - To disable a task, click the ***Disable task*** link for the relevant task. The Scheduler will no longer run this task.

   - To enable a task, click the ***Enable task*** link for the relevant task; then, define the frequency at which this task must be run. To do this, click on the value in the task's **Frequency** column; then, select a value (e.g. monthly, weekly, every minute, etc.). Click ***Save***. The Scheduler will run this task according the frequency you set.

   - To alter the frequency at which the Scheduler is set to run a task, click on the value in the task's **Frequency** column; then, select a value (e.g. monthly, weekly, every minute, etc.). Click **Save**. The Scheduler will run this task according the frequency you set.

   - To run a task the next time the Scheduler runs, click ***Run on next iteration***.



Task Scheduler Management

The scheduler runs document indexing and various house keeping tasks, etc in the background.

	Task	Frequency	Next run time	Previous run time	Time taken to complete
1	Indexing	every minute	2008-10-15 12:50:05	2008-10-15 12:49:05	7.27s
2	Index Optimization	weekly	2008-10-21 16:42:32	2008-10-14 16:42:32	11.54s
3	Periodic Document Expunge				
4	Database Maintenance				
5	OpenOffice test	every minute	2008-10-15 12:50:53	2008-10-15 12:49:53	7.58s
6	Cleanup Temporary Directory	every minute	2008-10-15 12:51:01	2008-10-15 12:50:01	2.41s
7	Disk Usage and Folder Utilisation Statistics	every 5 minutes	2008-10-15 12:54:13	2008-10-15 12:49:13	8.64s
8	Refresh Index Statistics	daily	2008-10-15 16:43:13	2008-10-14 16:43:13	11.37s
9	Refresh Resource Dependancies	daily	2008-10-15 16:43:25	2008-10-14 16:43:25	7.72s
10	Document Alerts	daily	2008-10-15 16:43:33	2008-10-14 16:43:33	2.58s

Use the bottom scroll bar on the screen to view the Task Scheduler options.

3.4.7 Accessing Support and System Information

This procedure displays support and system information that allows you to troubleshoot your system, and provides a link to the KnowledgeTree Issue Tracker where you can report bugs, view known issues, and find out whether a fix has been found for the issue you are experiencing.

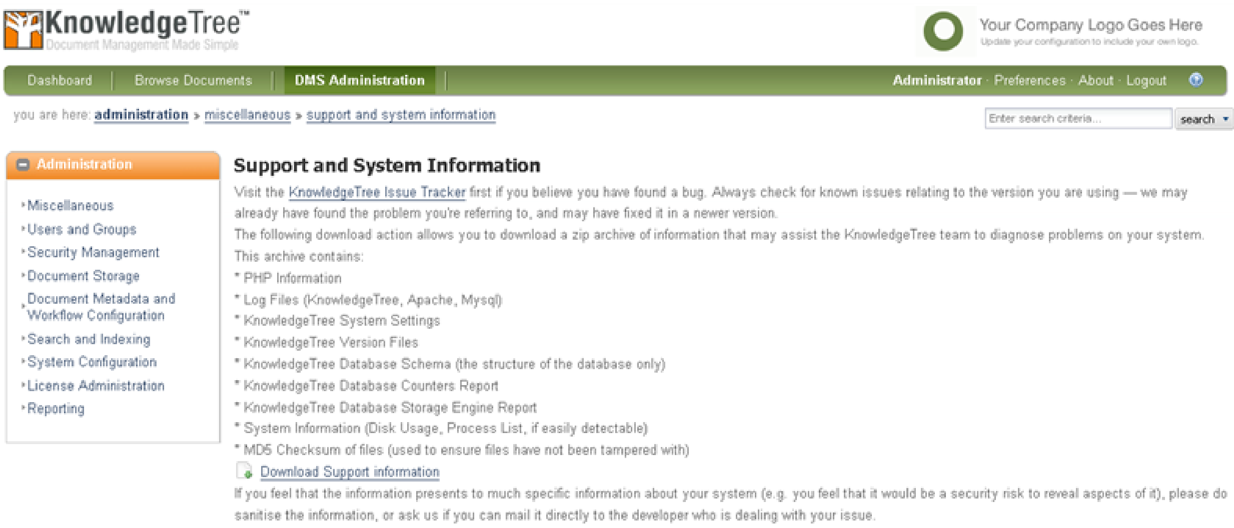
Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **DMS Administration - Miscellaneous - Support and System information**.

2. Here you can ...
   - **follow the link to the KnowledgeTree Issue Tracker** - report bugs, view known issues, or find out whether a fix has already been found for your issue.

   - **download php information** - click this link to run a `php_info` command. The output of this command displays in a scrollable window on the page. You may need to send this information to KnowledgeTree support staff for further assistance with an issue. The zipped file contains: PHP information; log files for KnowledgeTree, Apache, and Mysql; system settings; version files; database schema (database structure only); database counters report; database storage engine report; system information (disk usage, process list, if easily detectable); MD5 Checksum of files (used to ensure files have not been tampered with)

***Note:** If you are concerned that distributing the php information represents a security risk for your organization, we recommend that you sanitize the output before copying and sending it. Alternatively, please enquire about sending the information directly to the developer dealing with your issue.*



Support and System Information

3.4.8 Customizing Columns Displayed in Browse Documents and Search Results

This procedure displays and edits the columns to display in Browse Documents and in Search results.

Perform the following steps:

1. Use your administrator details to log in to KnowledgeTree's web interface; then, open **DMS Administration - Miscellaneous - Manage Views**.

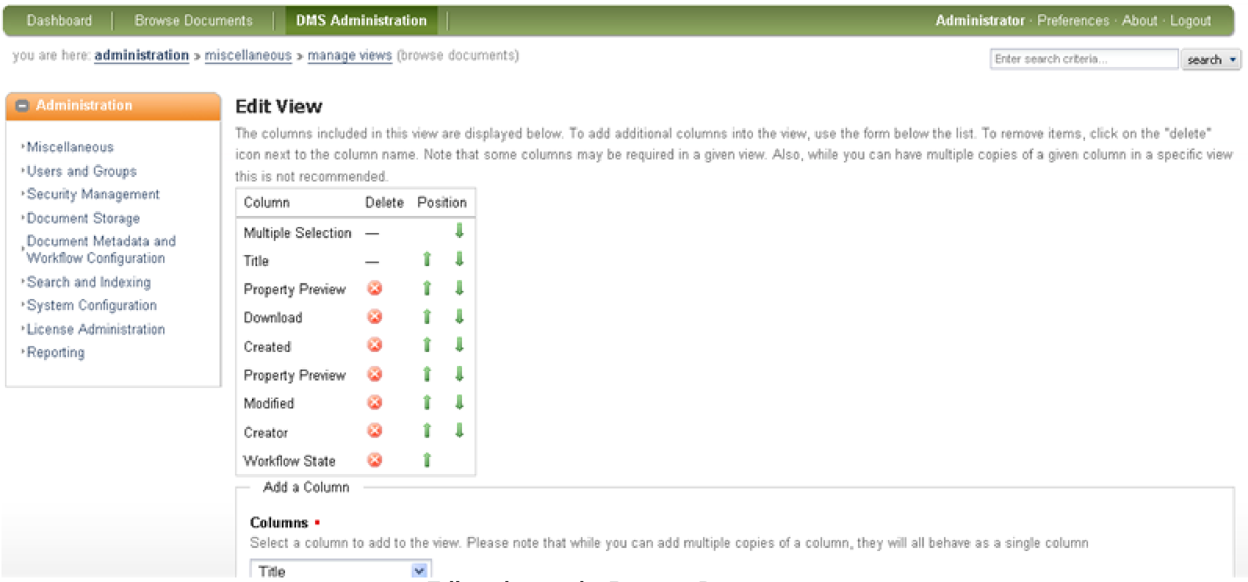
2. On the **Select View** page, choose the view to configure - options are **Browse Documents** and **Search**.

3. On the **Edit View** page, note the existing column configuration for the view selected.

4. **Do you want to ...**
   - **change the order in which columns display?** Move the arrows in the **Position** column up or down as required.

   - **remove a column from the currently configured view?** Click the **Delete** icon adjacent to the relevant column.

   - **add a column to the currently configured view?** Select a column in the **Columns** pick list; then, click **Add Column to View**.



Edit columns in Browse Documents

3.4.9 Configuring Units

This procedure displays, edits and deletes existing Units, adds new Units, and opens a Unit at its folder location in KnowledgeTree.

⊟ What are Units?
Adding a Unit adds a folder to the root folder - the Unit folder is a method of organizing the

content in the document management system into two or more separate entities that you want to administer separately. These divisions may model your business (departmental or geographic divisions for instance).

Each Unit may be assigned its own administrative user, who then has administrator privileges only within the Unit, while the system remains centrally administered by the system administrator.

See Also:
KnowledgeTree Organizational Hierarchy

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration - Users and Groups - Control Units** to open the **Unit Administration** page.

2. **Do you want to ...**

- **view existing units?** All units added to the system display on the page.

- **add a new unit?** Click ***Add a new unit***. On the **Add a new unit** page, define a unit name. Click ***Next***. Browse to select a folder location for the new unit; then, click ***create unit***.

- **edit a unit?** Click the ***Edit*** icon for the relevant unit to open the **Edit Unit Details** page. Define a new short name for the unit in the **Unit Name** field; then, click ***save changes to unit***.

- **delete a unit?** Click the ***Delete*** icon for the relevant unit.

- **open a unit at its' folder location?** Click the link in the **Folder** column for the relevant unit.

See Also:
Assigning a Unit administrator

3.4.9.1 Assigning Unit Administrators

This procedure assigns the members of a group as Unit administrators.

Note: *Folder permissions are assigned by Role and by Group, but not to individual users (any user added to KnowledgeTree must be added to a group or to a role to obtain any level of access to content in KnowledgeTree). Unit administrator privileges are only given to Groups, and not to Roles.*

Pre-requisites:

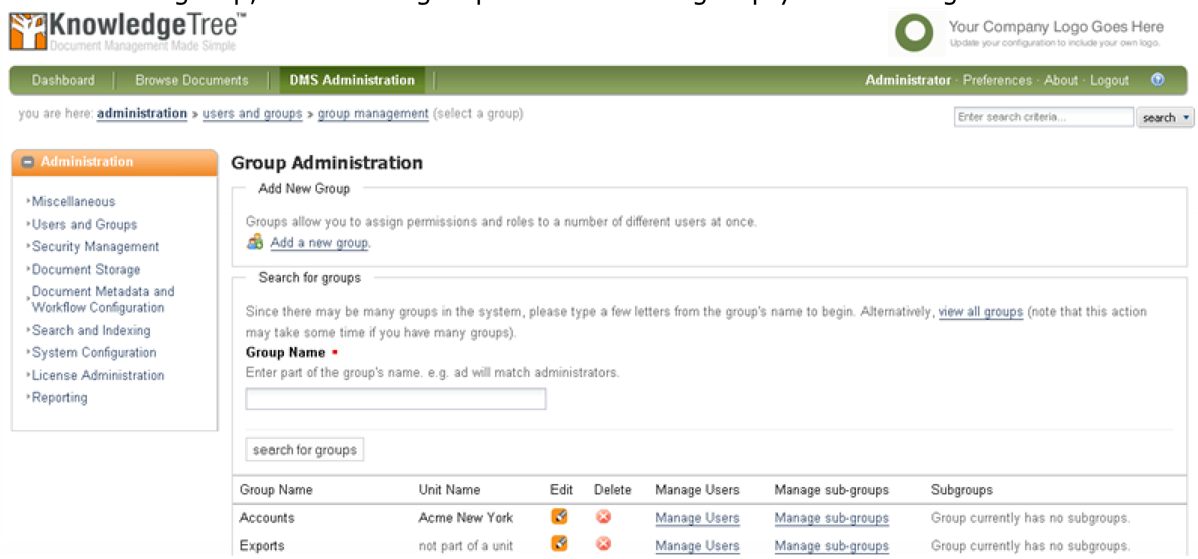
- Any users that you wish to assign as Unit Admins on a Unit must have been added to KnowledgeTree, and they must have been added to the group where you are allocating Unit Admin privileges. How do I add users? How do I add users to groups?
- The group must have been added to KnowledgeTree. How do I add groups?
- The Unit on which you are assigning Unit Admin privileges must have been added to KnowledgeTree. How do I add Units?
- The group where you are assigning Unit Admin privileges must have been added to the Unit, and when adding the group to the Unit, you must have defined that the Group has Unit

Admin rights on the Unit. [How do I add a Group to a Unit?](#)

Perform the following steps:

1. Use your system administrator credentials to log in to KnowledgeTree's web interface; then, open **DMS Administration - Users and Groups - Manage Groups.**

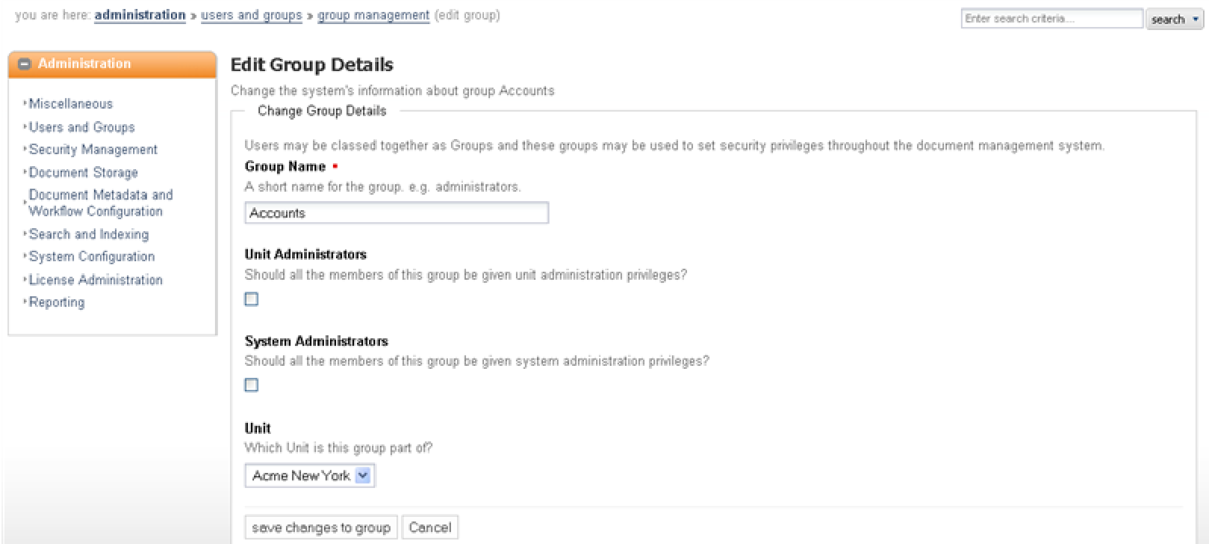
2. Search for a group, or view all groups to locate the group you're editing.



Search for Groups

3. Click the ***Edit*** icon for the relevant group.

4. On the group editing screen, select the **Unit Administrator** check box to assign members of the group as administrators in its Unit.



Assign a Group as Unit Administrator

5. Click ***save changes to group***.

3.4.10 Managing Users and Groups

3.4.10.1 Adding New Users

This procedure adds new users to KnowledgeTree.

Note: *New users may be added to KnowledgeTree manually or via an external authentication method. Users must be added to groups or to roles in order to view and work with files and folders in the system - this is because permissions are assigned to groups and roles and not to individual users.*

How to add new users manually

Perform the following steps:

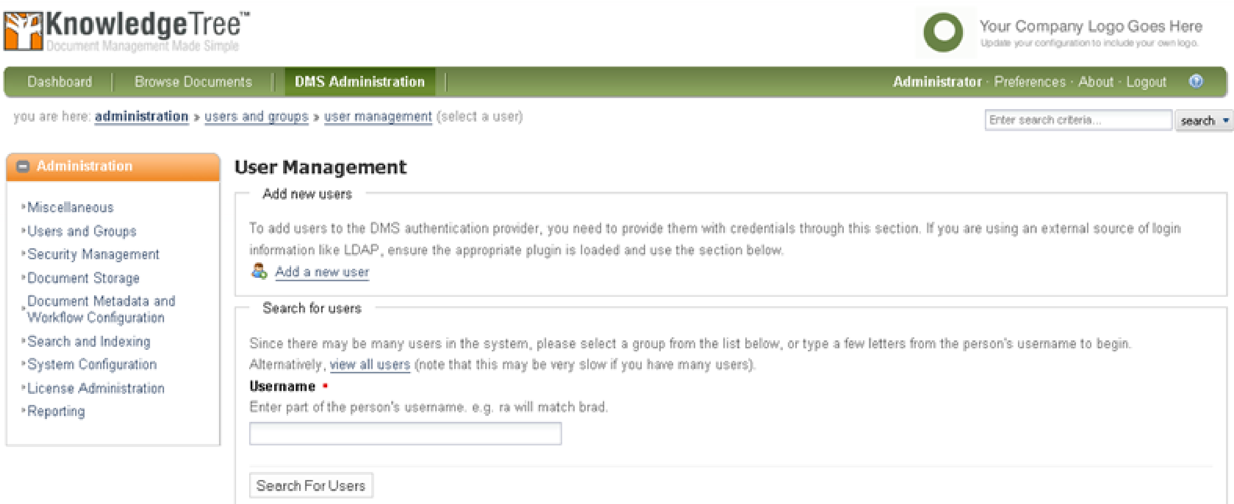
1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **DMS Administration - Users and Groups - Manage Users** to open the **User Management** page.

2. Click ***Add a new user*** to open the **Add a user** page.

3. Add the user's details: log in username, full name, email address, whether this user may receive notifications, password, mobile phone number, maximum number of times this user may log in after automatic session timeouts.
   Note: *KnowledgeTree does not allow you to manually add duplicate users. Duplicate users may be added when bulk importing users via an external authentication source, and in this case any duplicate usernames are appended with the word 'duplicate'.*

4. Click ***create user***.

5. The user is added to the system. To complete this task, ensure that the user is added to a group and enabled.



Add New User Page

How to add new users from an external authentication source

Pre-requisites:

- Add the authentication source

- When using an external authentication provider, such as LDAP, ensure that the provider's plugin is registered and enabled.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **DMS Administration - Users and Groups - Manage Users**.

2. On the **User Management** page, click ***Add a new user*** to open the **Add a user** page.
   Note: *KnowledgeTree does not allow you to manually add duplicate users. Duplicate users may be added when bulk importing users via an external authentication source, and in this case any duplicate usernames are appended with the word 'duplicate'.*

3. Select the authentication source from the pick list in the **Add a user from an authentication source** section.
   Note: *It is not possible to convert users from one authentication source to another after adding the users. You must have added the authentication source and ensure that the provider's plugin is registered and enabled to allow it to show up in the pick list.*

4. Click **Add from source** to open the **Search for user** page for the authentication source you selected; then, do one of the following:
   - type all or part of the user's name in the **User's name** field; then, click ***search for users***. Exit this procedure.

   - select **Mass import** to add all users from the specified authentication source; then, click ***search for users***. Exit this procedure.
   Note: *The details of individual users included in a mass import cannot be verified. Any duplicate users are added to KnowledgeTree with 'duplicate' appended to their usernames.*

3.4.10.2 Viewing / Editing / Deleting Users

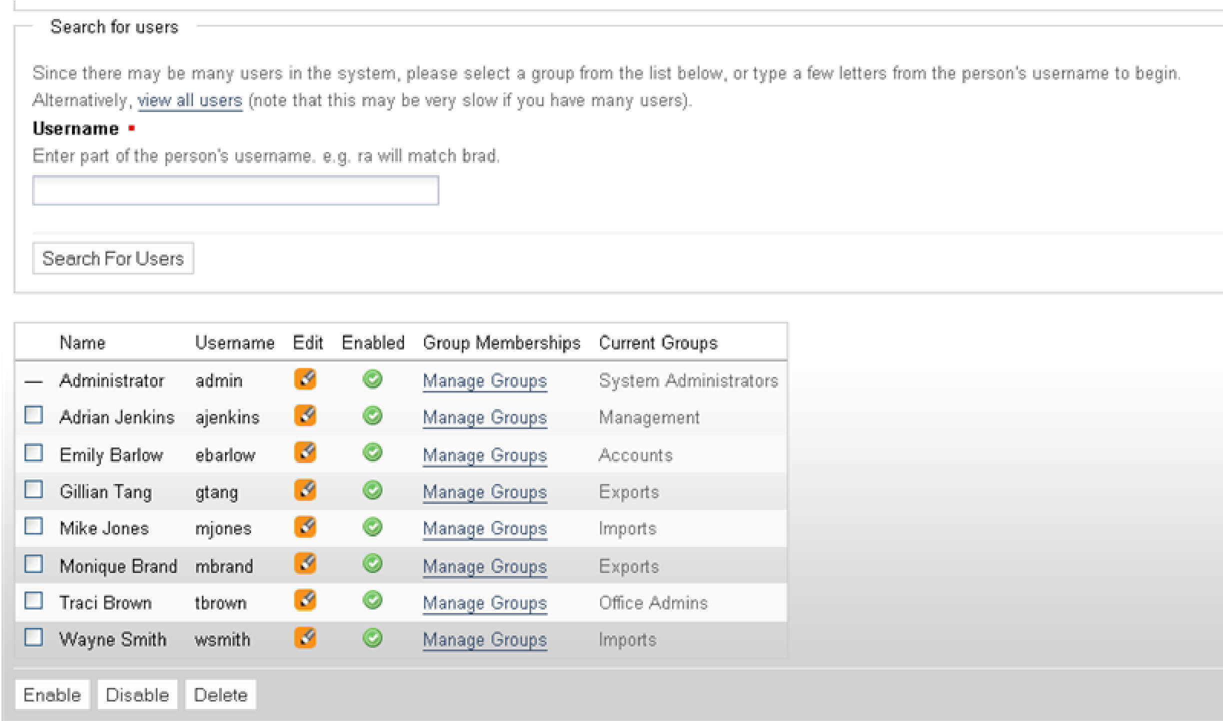
This procedure displays, enables, disables, deletes, and edits existing users.

Note*: Deleting a user permanently disables the user in the database - their details are retained to prevent the corruption of data.*

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **DMS Administration - Users and Groups - Manage Users** to open the **User Management** page.

2. To view existing users (one or more):
   - If you are looking for the details of a specific user, enter their username, or part of the username, in the **Username** field; then, click ***Search for Users*** to display the user's details.
   - To display a list of all system users, click ***view all users***.



View all Users

3. **Do you want to ...**
   - **disable users?** Select the **Disable** check box for the relevant user/s; then, click ***Apply Changes***.

   Note: *New users are enabled by default. Users are disabled to prevent them from accessing the system.*

   - **enable users?** Select the **Enable** check box for the relevant user/s; then, click **Apply Changes**.

   Note: *New users are enabled by default. You will only need to enable a user that has been disabled.*

   - **edit a user?** Click the ***Edit*** icon for the relevant user to open the **Edit User Details** page; then, go to step 4.

   - **delete a user?** Select the check box adjacent to the relevant user's name; then, click ***Delete***.

4. **Select an option:**

4.1. Change a user's password? Click ***Change [user name] password***; then, to ...
   - **force a password change the next time this user logs in,** click ***change password*** in the **Force user to change password** section.

   - **change the password**, define a new password in the **Password** field; then, re-enter the password in the **Confirm Password** field. When you're done, click ***change password*** in the **Change User's Password** section.

4.2. Edit the basic user profile? Make the required changes on the page. When you're done, click ***save changes***. The following information is editable:
   - username - login name

- name - the user's full name
- email address - to receive notifications
- email notifications - defines whether notifications are emailed to the user
- mobile number
- maximum sessions - the maximum number of times this user will be allowed to log in if they have not logged out of a previous session

4.3. Change the user's group membership? Click the ***Manage Groups*** link for the relevant user to open the **Change [username] Groups** page. Then, to ...

- **add the user to a group**, populate the **Available Groups** field (filter or show all); then select groups for this user. Click the right-pointing arrow to populate the **Assigned Groups** field. Click ***save changes***.

- **remove the user from a group**, select the relevant group in the **Assigned Groups** field; then, click the left-pointing arrow to remove the group from the **Assigned Groups** field. Click ***save changes***.

3.4.10.3 Adding New Groups

This procedure adds a new group in KnowledgeTree.

Note: *You can use this section to import Active Directory groups. The imported group may be edited to manually synchronize the Active Directory user/group membership.*

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration - Manage Groups** to open **Group Administration**.

2. Click **Add a new group** to open the **Add a new Group** page.

3. Are you adding the new group **...**

   - **from an external authentication source that has *already* been configured for KnowledgeTree?** Select the authentication source; then, click **Add from source**. Enter the group's name in the text field; then, click **search for groups** to display a list of available groups. Select the groups to add; then, click **Add**. Go to step 4.

   - **from an external authentication source that has *not* yet been configured for KnowledgeTree?** Add the new authentication source to enable the authentication provider's plugin; then, return to this procedure to add the user from the *pre-configured* external authentication source.

   - **manually, within KnowledgeTree?** Go to step 4.

4. Define a name for the group in the **Group Name** field.

5. **Do you want to assign ...**
   - **system administrative privileges to all members of this group?** Select the **System Administrators** check box.

   - **unit administrator privileges to all members of this group?** Select the **Unit**

Administrators check box.

- **neither of the above?** Leave the **Unit Administrators** check box and the **System Administrator** check box de-selected; then, go to step 7.

6. Click **create group**.
__Note:__ A system message informs you that the new group has been created.

3.4.10.4 Viewing / Editing / Deleting Groups

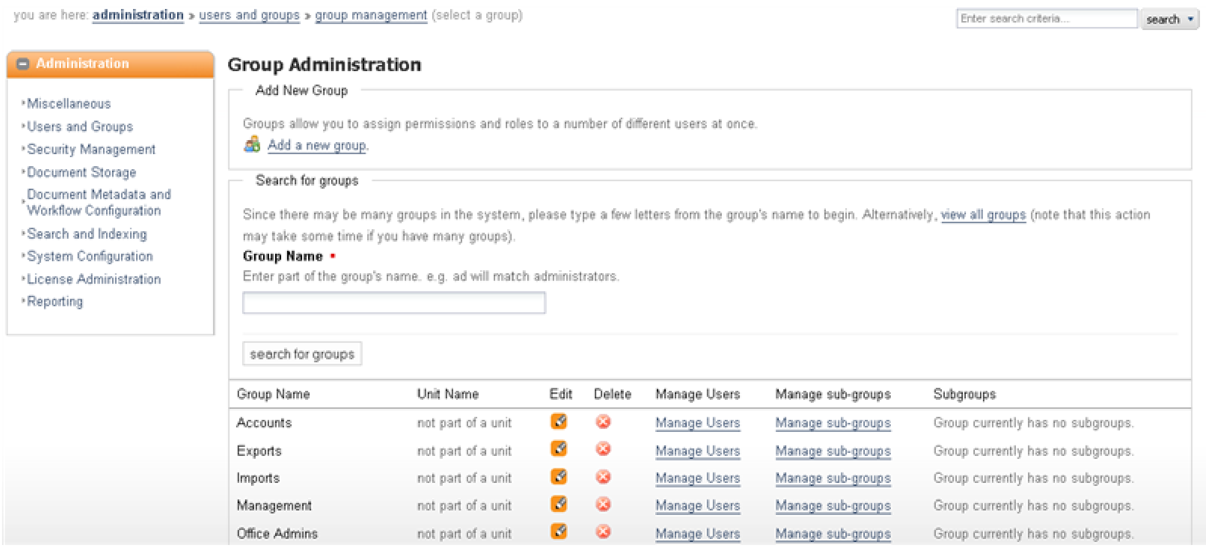
This procedure displays existing groups, and edits and deletes groups, including adding users and sub-groups to groups, and removing users and sub-groups from groups.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **DMS Administration - Users and Groups - Manage Groups** to display the **Group Administration** page.

2. Display existing groups - one or more:
   - To display all groups in the system, click *view all groups*. All groups are listed in the table on the page.
   - To display a specific group, enter all or part of the group name in the **Group Name** field; then, click ***search for groups***.

__Note:__ The following information is provided for each group: group name, unit name (if the group has been added to a Unit); sub groups (if any); and links to the following functionality - edit the group, manage users, manage sub-groups.



View all Groups

3. **Do you want to ...**

- **edit a group?** Click the ***Edit*** icon for the relevant group to open the **Edit Group Details** page, where the following information is editable: the name of the group, whether group members have unit administration privileges, whether group members have system administration privileges, and to add or remove the group from a Unit. Make the required changes; then, when you're done, click ***save changes to group***.

- **delete a group?** Click the ***Delete*** icon for the relevant group.

- **add users to a group?** Click ***Manage Users*** for the relevant group; then, on the **Manage Users in [group name]** page, populate the **Available Users** field; then, select one or more users to add to the **Assigned Users** field. Click ***save changes***.

- **remove users from a group?** Click ***Manage Users*** for the relevant group; then, on the **Manage Users in [group name]** page. In the **Assigned Users** field, select the relevant users; then, click the adjacent left-pointing arrow to move these users to the **Available Users** field. Click ***save changes***.

- **add new sub-groups to a group?** Click ***Manage sub-groups*** for the relevant group. On the **Manage Sub-Groups ...** page; then, select groups from the **Available Groups** field and add these groups to **Assigned Groups**. Click ***save changes***.

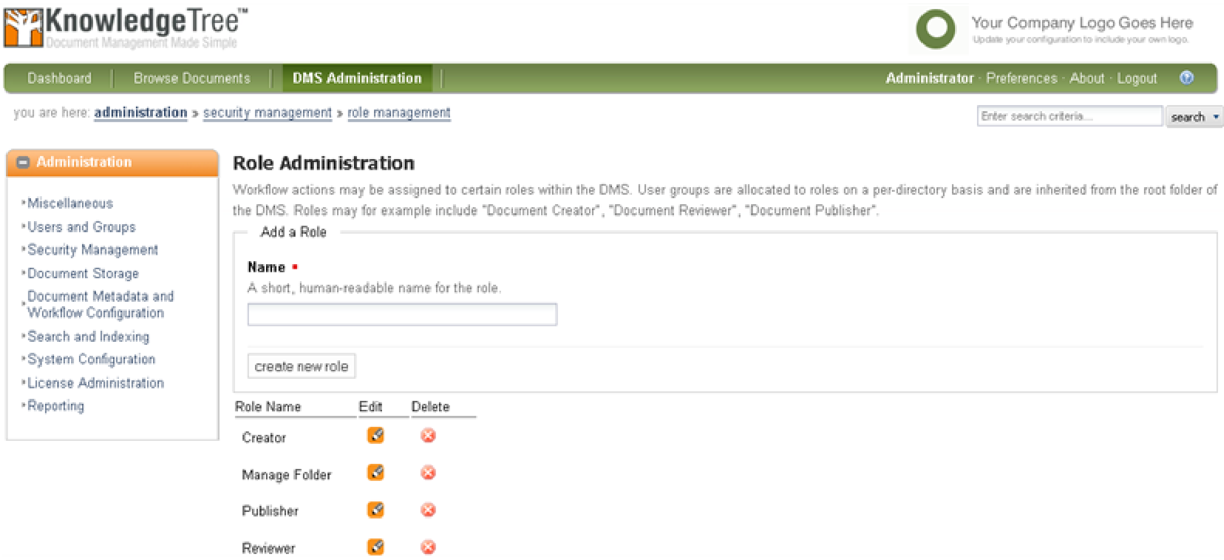
- **remove sub-groups from a group?** Click ***Manage sub-groups*** for the relevant group to open the **Manage Sub-Groups ...** page; then, select move the relevant groups from **Assigned Groups** to **Available Groups**. Click ***save changes***.

3.4.11 Adding New Roles

This procedure adds a new role.

Perform the following steps:

1. Use your administrator login credentials to log in to KnowledgeTree's web interface; then, open **DMS Administration - Security Management - Roles** to open the **Role Administration** page.



Role Administration

2. Define a descriptive name for the role in the **Name** field - e.g. Editor; then, click **create new role**.
   Note: *A system message confirms that the role has been created. View the list of roles at the bottom of this page to see the new role added to the list of existing roles. The role*

will be available for allocating on folders in the folder view in Browse Documents.

See Also:
Assigning and editing roles
KnowledgeTree Organizational Hierarchy

3.4.12 Viewing / Editing / Deleting Roles

This procedure displays, edits, and deletes existing Roles.

What are Roles?
KnowledgeTree **Roles** may include: document creator, reviewer, publisher, writer, editor, secretary, developer, manager, or secretary, and so on.

Workflow actions - e.g. *review*, or *publish* - are typically assigned to a specific role. Permissions are added to the role, and the user is assigned to the Role to perform the action required in the system.

Perform the following steps:

1. Use your administrator login credentials to log in to KnowledgeTree's web interface; then, open **DMS Administration - Security Management - Roles** to open the **Role Administration** page.
2. **Do you want to...**
   - **view roles that have been configured for the repository?** Scroll down to the bottom of the page to view a list of existing roles.
   - **change the name of an existing role?** Click the ***Edit*** icon for the relevant role to open the editing page. Specify the new name for the role in the **Name** field; then, click **update role information**.
   - **delete an existing role?** Click the ***Delete*** icon for the relevant role.

See Also:
KnowledgeTree Organizational Hierarchy
Assigning and editing roles

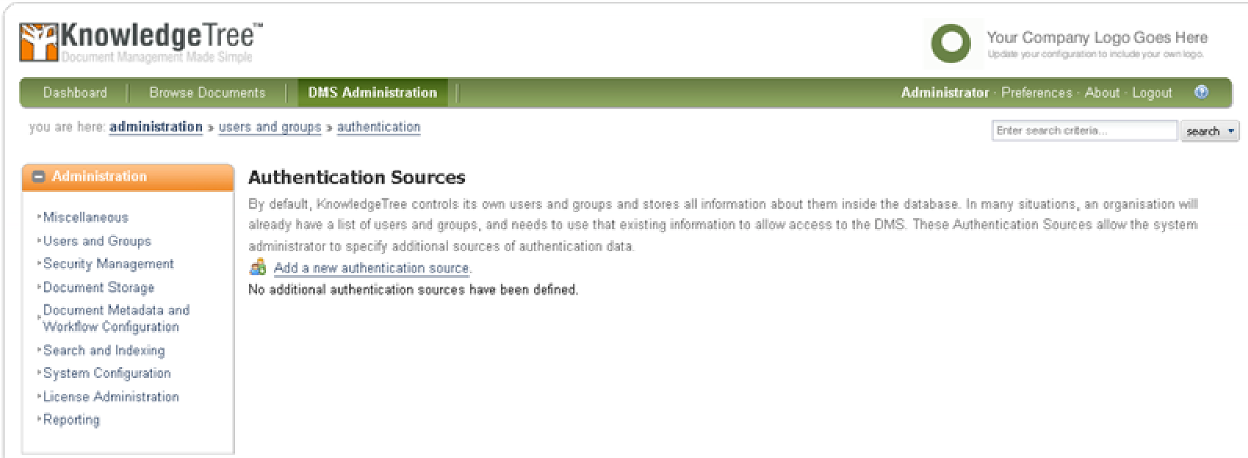
3.4.13 Configuring Authentication Sources and Authentication Providers

KnowledgeTree allows you to choose either of the following authentication methods to control access to the system:

- Database authentication - this is KnowledgeTree's inbuilt authentication method
- External authentication - you may choose to add external authentication providers and external authentication sources in order to maintain your organization's list of users and groups requiring controlled access to KnowledgeTree

Note: *KnowledgeTree uses the credentials of users added through the external authentication source to control access to the document management system. You need to choose your preferred* *authentication method when adding users to KnowledgeTree. To change to an alternate authentication method after adding the user and selecting an authentication method, you will need to add the user a second time, and delete the first user profile you added.*

How to add new authentication sources and edit and delete existing authentication sources



Add Authentication Source

3.4.13.1 Editing / Deleting / Adding Authentication Sources

This procedure edits and deletes existing authentication sources and adds new authentication sources.

Perform the following steps:

1. Use your administrator login credentials to log in to KnowledgeTree's web interface; then go to **DMS Administration - Users and Groups** - **Authentication** to open the **Authentication Sources** page.

2. **Do you want to ...**
   - **add an authentication source?** Go to step 3.

   - **edit an authentication source?** Click the ***Edit*** icon for the relevant authentication source to open the editing screen. Make the required changes. The following information is editable: name, and/or authentication provider. When you're done, click ***Save***.

   - **delete an authentication source?** Click the ***Delete*** icon for the relevant authentication source.

3. Click ***Add a new authentication source*** to open the **Add an authentication source** page; then ...

   3.1. Type a name for the new authentication source in the **Name** field.

   3.2. Select the type of authentication source from the **Authentication Provider** pick list.
   Note: *The pick list contains the default options -* ***LDAP Authentication****, and* ***Active Directory Authentication****. You can add additional authentication sources - check the KnowledgeTree community forums at www.knowledgetree.com for developer information.*

   3.3. Click ***Add a new source*** to open the configuration screen. Complete the following fields

on the page.
- Server name
- Server port
- Use Transaction Layer Security?
- Base DN
- Search User
- Search Password
- Search Attributes
- Object Classes

Note: *See the onscreen description below each field for the type of information required in the field.*

4. Click ***Save***. The configuration is updated and a summary is provided for review.

5. **Do you want to change the ...**

- **standard configuration details?** Click ***Edit standard configuration*** to open the **Edit an authentication source** page. Make the required changes; then, click **Save**.

- **provider configuration details?** Click ***Edit provider configuration***. Make the required changes; then, click **Save**.

3.4.13.2 Editing Authenication Providers

This procedure edits an existing authentication provider.

Perform the following steps:

1. Use your administrator login credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration - Users and Groups** - **Authentication** to open the **Authentication Sources** page.

2. Locate the authentication source on the page; then, click the ***Edit*** icon in the **Edit Provider Information** column to open the editing screen for the relevant authentication provider.

3. Make the required changes - the following information is editable:
   - server name
   - server port
   - whether to use Transaction Layer Security
   - base DN - where the start searches
   - user account for searches
   - password for searches
   - search attributes
   - object classes to search for users

4. Click ***Save***.

3.4.14 Configuring Permission Types, Roles, and Dynamic Conditions

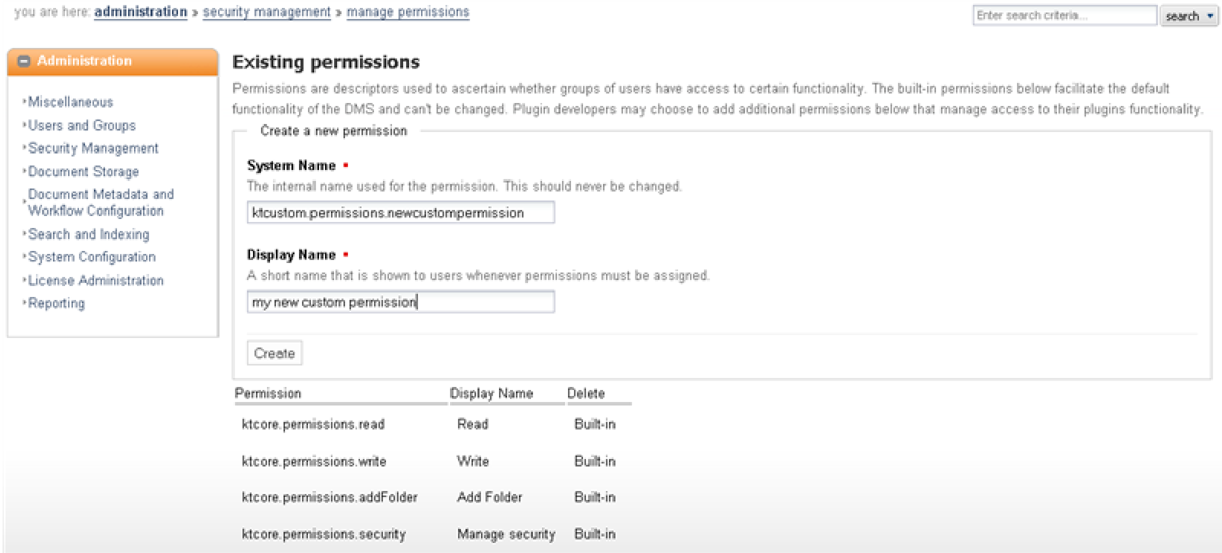
3.4.14.1 Adding New Custom Permission Types

This procedure adds custom permission types.

Note: *Custom permissions are typically used to control access to functionality provided through additional plugins added to your KnowledgeTree installation. Only the custom permission types that you add may be deleted.*

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration - Security Management - Permissions** to open the **Existing permissions** page.



Add Custom Permission Type

2. In the **System Name** field, define a name for the new permission type - e.g. 'ktcustom. permissions.download_plugin'.

3. In the Display Name field, define a short name for the new permission type - e.g. 'Download Plugin'.

4. Click ***Create***.
   Note: *The new permission type displays along with other permission types at the bottom of the page.*

See Also:

- KnowledgeTree Permissions System
- Creating the Permissions Structure
- Viewing / Editing Folder Permissions

3.4.14.2 Viewing / Deleting Permission Types

This procedure displays and deletes existing permission types.

Note: *Only the custom permission types that you add for your KnowledgeTree installation may be deleted.*

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **DMS Administration - Security Management**.

2. Click ***Permissions*** to open the **Existing permissions** page.

3. **Do you want to...**
   - **view existing permissions?** Scroll down to the bottom of the page to view a list of permissions configured for KnowledgeTree - both inbuilt and customized.
     Note: *KnowledgeTree's default permissions display at the top of this list, and cannot be deleted. They are recognizable by their system name, 'ktcore'.*

   - **delete a permission in the list?** Click the **Delete** icon for the relevant permission.
     Note: *Only custom permissions can be deleted.*

3.4.14.3 Dynamic Conditions

A **dynamic condition** is a system rule that allows or disallows a specific action on documents and folders that match a set of predefined criteria - i.e. documents added after a certain date, or that were added by a specific user.

Dynamic Conditions and Saved Searches

Dynamic conditions are similar to KnowledgeTree's **Saved Search** function - a dynamic condition comprises a criteria set, and is run like a saved search, where the system returns a documentation set that matches the criteria.

The difference between saved searches and dynamic conditions is that a dynamic condition is used to apply permissions selectively on the content defined by the dynamic condition.

Why is the condition 'dynamic'?

Dynamic conditions are based on editable criteria, on content (documents and folders) that change. When running a dynamic condition, KnowledgeTree returns content that matches the criteria at the time you run the condition. Returned results include recently added content, and excludes content that no longer exists or that no longer matches the criteria.

Dynamic conditions are implemented on a selection of documents in the repository, and these documents are mapped to the dynamic condition through the criteria currently configured for the condition.

How are Dynamic Conditions Configured and Applied?

Dynamic conditions are configured globally through KnowledgeTree's web interface - in **DMS Administration - Security Management - Dynamic Conditions**.

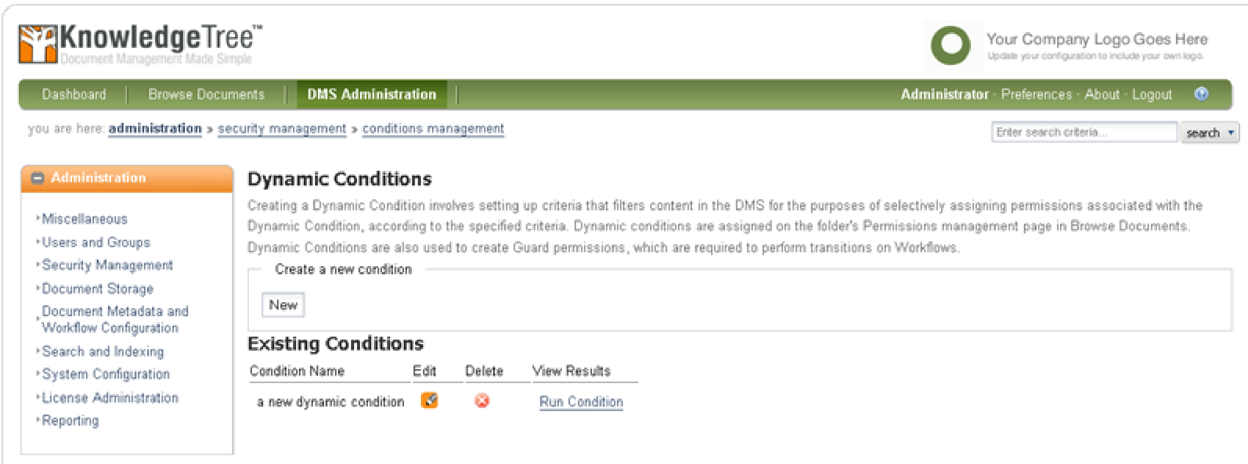
Dynamic conditions are assigned, and unassigned on folders, when setting up permissions on the folder. Dynamic conditions are also assigned in the **Workflow** configuration task, where they are applied as a **Guard permission** - e.g. any user who wants to transition the workflow to a new state must be assigned a guard permission to do so.

Dynamic condition criteria includes the following parameters:
- document metadata - name, type, author, publish date, etc.
- the content within the document
- transactional information for a document - check outs / check-ins / moves / copy actions / etc

See Also:
- Editing Workflows
- Viewing / Editing Folder Permissions
- Add New Dynamic Condition
- View / Edit Existing Dynamic Condition
- Run Dynamic Conditions
- Assign / Remove Dynamic Conditions

3.4.14.3.1 Viewing / Editing / Deleting / Adding Dynamic Conditions

This procedure displays, edits, and deletes existing dynamic conditions, and adds new Dynamic Conditions.



Configure Dynamic Conditions

Perform the following steps:
1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration - Security Management - Dynamic Conditions** to open the **Dynamic Conditions** page.

2. **Do you want to...**
   - **view existing dynamic conditions?** All predefined dynamic conditions are displayed at the bottom of this page.

   - **edit a dynamic condition?** Click the ***Edit*** icon for the relevant condition to open the **Edit an existing condition** page. Make the required changes - the following information is editable: name, edit/add/remove criteria and criteria groups. When you're done, click

Update Dynamic Condition.

- **delete a dynamic condition?** Click the ***Delete*** icon for the relevant condition. Confirm the removal of the dynamic condition.
  Note: *Deleting a dynamic condition may change the permissions structure and cause the incorrect removal of permissions in the system.*

- **add new dynamic conditions?** Go to step 3.

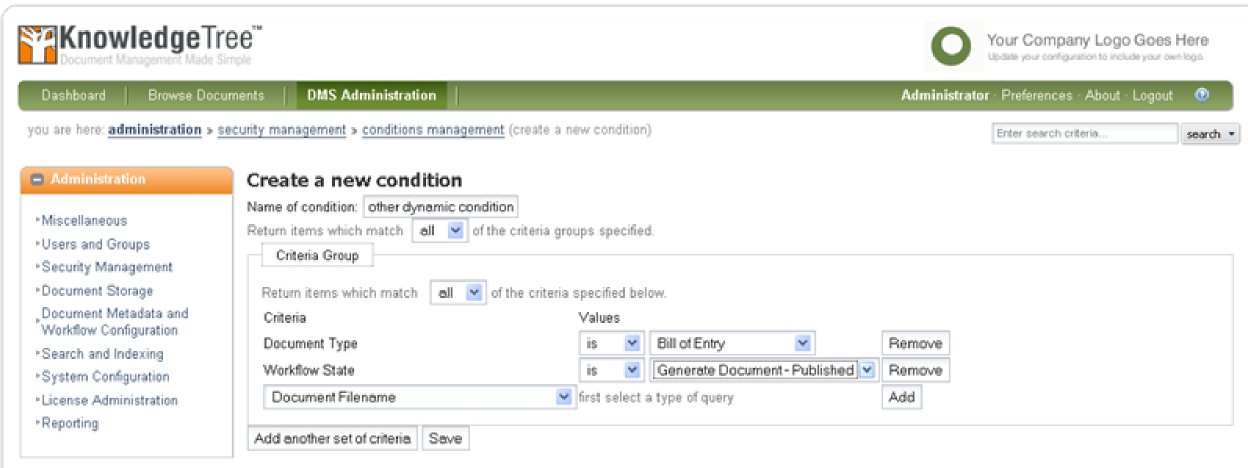
3. Create new dynamic condition:
   3.1. Click ***New*** to open the **Create a new condition** page.

   3.2. Define a name for this condition in the **Name of condition** field.

   3.3. Select **any** or **all** from the **Return items which match [all/any] of the criteria groups specified** pick list.

   3.4. Configure one or more criteria groups in the **Criteria Group** section:
      3.4.1. Select **any** or **all** from the **Return items which match [all/any] of the criteria specified below** pick list.
      3.4.2. Select a query type from the **Criteria** pick list; then, click **Add** to display the **Values** field for the criteria type you selected.
      3.4.3. Complete the **Values** field/s for the selected query.
      3.4.4. Repeat this step to add more criteria groups.

4. Click ***Save***.
   Note: *Dynamic conditions are added to the folder Permissions page, where you can assign and assign dynamic conditions on folders.*



Configuring Criteria for Dynamic Conditions

3.4.14.3.2 Assigning / Removing Dynamic Conditions

This procedure assigns or removes a dynamic condition, with one or more permissions for one or more selected groups within a selected folder's permissions management interface.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **Browse Documents**.

2. Locate the folder where you want to assign or remove dynamic conditions - search for

the folder or navigate the folder structure in Browse Documents.

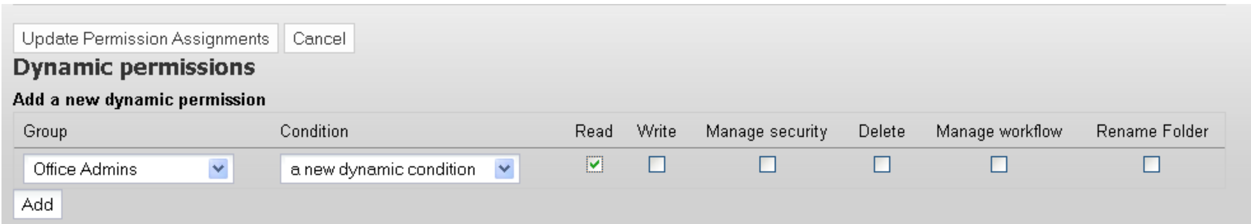
3. Click ***Permissions*** in the **Actions on this folder** menu to open the **View permissions for [folder name]** page.

4. **Does this folder ...**
   - **define its own permissions?** Click ***Edit permissions***. Go to step 5.
   - **inherit permissions from its' parent folder?** Click ***Override permissions***. Go to step 5.

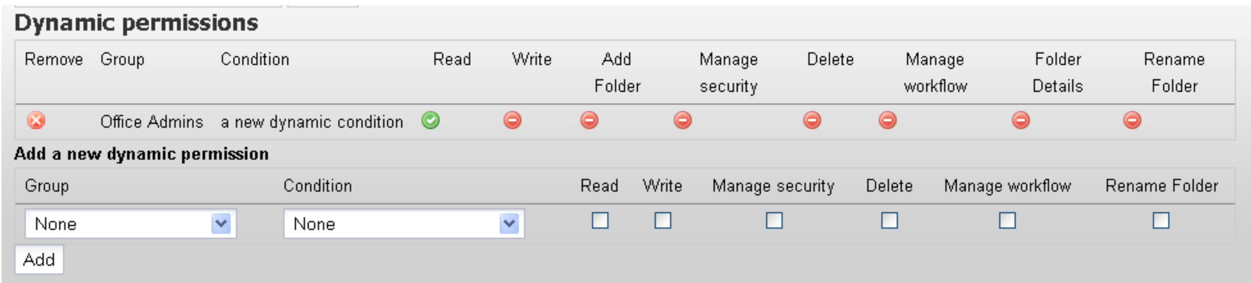
5. Scroll down to the **Dynamic permissions** section on this page.

6. **Do you want to:**
   - **assign a dynamic condition to this folder?** Go to step 7.
   - **remove a dynamic condition from the folder?** Click the **Delete** icon for the relevant dynamic condition.

7. Assign a dynamic condition:
   7.1. Select a group from the **Group** pick list.
   7.2. Select the condition from the **Condition** pick list.
   7.3. Select **Permissions** check boxes - one or more (these permissions will be associated with this dynamic condition on this folder).
   7.4. Click ***Add***.
   7.5. Repeat this step to assign more dynamic conditions on the folder.



Assign a dynamic condition on a folder



View dynamic conditions on the folder

3.4.14.3.3 Running Dynamic Conditions

This procedure runs a dynamic condition (tests the condition) and returns documents and folders matching the criteria defined for the dynamic condition.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration - Security Management - Dynamic Conditions**.

2. View the currently configured dynamic conditions in the **Existing Conditions** section on this page.

3. Click **Run Condition** in the **View Results** column for the relevant dynamic condition to open the **[dynamic condition name]** page.

4. **Do you want to ...**
   - **view search criteria for this dynamic condition?** Expand **Parameters**.
   - **view documents and folders returned in this search?** Search results are displayed beneath the **Parameters** section on the page.
   - **modify the search criteria and rerun the search?** Click ***Edit*** to open the **Edit an existing condition** page. Change the criteria, and/or add additional criteria; then, click ***Search***. The revised results display on the **Search Results** page.
   - **save this search?** Define a name for the search in the **New search** field; or, select an existing search to overwrite; then, click ***Save***.

3.4.15 Document Storage

3.4.15.1 Forcing a Document Check-in

This procedure overrides the currently checked out status of a document.

The KnowledgeTree administrator can force check-in a document where a checked out document is urgently required back in the repository, but the user who checked the document out is not available to check the document in.

Note: *The document is checked back in to the repository without saving any changes that may have been made to it while it was checked out.*

Perform the following steps:

1. Open **DMS Administration**; then, click **Document Storage**.

2. Click ***Checked Out Document Control*** to open the **Checked Out Documents** page.

3. View the list of checked out documents displayed on the page.

4. Click ***force check-in*** for the relevant document; then, verify that you're forcing check-in on the document.

5. Click ***Force Check-in***.

3.4.15.2 Restoring Archived Documents

This procedure restores archived documents.

Note: *By default, documents are restored to their original folder location. If the originating folder no longer exists, the document is restored to the root directory. Users may locate archived documents by their Document ID, through the dashboard* ***Go to Document ID*** *dashlet. Having located an archived* *document, a user may send an online restoration request to the administrator, who is notified via email and by a notice in the **Items Requiring Your Attention** dashlet.*

Perform the following steps:

1. Open **DMS Administration**; then, click **Document Storage**.
2. Click **Archived Document Restoration**.
3. Navigate the folder structure to locate the folder containing the document/s requiring restoration; then, click on the folder to display its content.
4. Select the check box adjacent to documents that need to be restored; then, click ***Restore***.
5. Ensure that you're restoring the correct document; then, click ***Confirm De-archival***.

3.4.15.3 Restoring / Expunging Deleted Documents

This procedure Restores and Expunges deleted documents.

Note: *Expunging saves disk space by permanently deleting documents that are no longer useful or required.*

Note: *By default, documents are restored to the folder location where they were originally deleted. If that folder no longer exists on the system, the document is restored to the root directory in the repository.*

Perform the following steps:

1. Open **DMS Administration**; then, click **Document Storage**.
2. Click ***Restore or Expunge Deleted Documents*** to open the **Deleted Documents** page, where you can view a complete list of documents that have been deleted in the repository, but not yet expunged.
3. **Do you want to...**
   - **restore any documents in the list?** Select the check box adjacent to each document you want to restore; then, click **Restore** to open the **Confirm Restore** page. Verify that you're restoring the correct document(s); then, click **Confirm Restore** to re-open the **Deleted Documents** page.
     Note: *A system message confirm the restoration of the document in the system.*
   - **permanently remove any of the documents in the list?** Select the check box adjacent to each document that must be permanently removed from the system; then, click **Expunge** to open the **Confirm Expunge** page. Verify that you're removing the correct document(s); then, click **Confirm Expunge**.
     Note: *A system message confirms the permanent deletion of the document from the system.*

3.4.15.4 Verifying Document Storage

This procedure verifies that the content in the repository is consistent with the content in the database.

The task should always be performed after upgrading KnowledgeTree.

Perform the following steps:

1. Open **DMS Administration**; then, click **Document Storage**.

2. Click **verify document storage** to launch the verification process.

3. View the results of the verification on the **Document Storage Verification** page.

3.4.16 Configuring Metadata

Configuring the metadata layer in your KnowledgeTree installation involves the following tasks:

Configure the document types, fieldsets, and fields

- Plan and add document types, including the email document type
- Plan and add fieldsets for these document types, and plan and add fields within each fieldset
- Associate fieldsets with the relevant document types

Configure Workflows

- Plan your workflows, including workflow states and transitions
- Add your worklows, and within each workflow define the states and transitions
- Allocate workflows to selected document types

See also:
Getting Started
KnowledgeTree Organizational Hierarchy
The Metadata Structure
Creating Effective Document Types
Metadata and the Folder Structure
Workflows

3.4.16.1 Document Types

KnowledgeTree groups documents by their **'Document Type**' - e.g. *Invoice*, *Report*, *Quotation*, *Order*, etc. Each Document Type is associated with one or more **Fieldsets**.

Each Fieldset represents a summary of related informational **Fields** - e.g. an *Invoice* document type may include a fieldset called *Client Details*. The *Client Details* fieldset may include the following fields: *Name*, *Account Number*, *Address*, *Telephone Number*, *Email Address*.

Fields, Fieldsets, and Document Type are **Metadata** - they are descriptive references for documents in the repository.

Note: *Document Types cannot be deleted; unused document types can only be disabled. This prevents the removal of required metadata.*

3.4.16.1.1 Viewing / Editing / Adding Document Types

This procedure displays and edits document types, and adds new document types.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's Web interface; then, go to **DMS Administration - Document Metadata and Workflow Configuration** - ***Document Types*****.**

2. **Do you want to ...**
   - **view existing document types?** Scroll down on the page to the **Existing document types** section, where you can view a list of the document types configured in your system, including currently associated fieldsets.
   - **edit a document type?** The following information is editable: associate/ disassociate fieldsets, change the document type name. Go to step 3.
   - **add a document type?** Go to step 4.

3. Edit the document type:

   3.1. Click the **Edit** icon for the relevant document type to open the editing screen.

   3.2. **Do you want to...**
   - **change the document type name?** Define a new name in the field adjacent to the ***Change*** button; then, click ***Change***.
   - **associate fieldsets with this document type?** Select one or more fieldsets in the **Available Fieldsets** pick list; then, click ***Associate Fieldsets***.
   - **disassociate currently linked fieldsets?** In the **Linked Fieldsets** section, select the check box adjacent to each fieldset that you're disassociating from this document type; then, click ***Disassociate Fieldsets***.

4. Add a document type:

   4.1. Define a name for the document type in the **Name** field; then, click ***Create*** to open the **Document Type [document type name]** editing page.

   4.2. **Have you added the fieldsets for this document type to the system?**
   - **Yes.** Select fieldsets from the **Available Fieldsets** pick list; then, click ***Associate Fieldsets***.
   - **No.** Create fieldsets to use with this document type. Go to Adding New Fieldsets to find out more about this task. When you're done, go to Associating/disassociating fieldsets and document types.
     Note: *Customized fieldsets are added to the* ***Available Fieldsets*** *pick list.*

3.4.16.1.2 Enabling / Disabling Document Types

This procedure enables and disables document types.

Perform the following steps:

1. Use your administrator login credentials to open **DMS Administration**; then, click **Document Metadata and Workflow Configuration** in the **Administration** menu to open the **Document Metadata and Workflow Configuration** section.

2. Click **Document Types** to open the **Document Types** page; then, scroll down the page to view a list of the document types that exist in the system.

3. Click the icon in the **Disable/Enable** column for the relevant document type.

3.4.16.1.3 Associating / Disassociating Fieldsets and Document Types

This procedure associates and disassociates fieldsets and document types.

Note: *Pre-defined custom fieldsets display on the Document Types editing page. Associating custom fieldsets with one or more document types on the Document Types editing page associates the metadata you added for the fieldset with the document type.*

Perform the following steps:

1. Open **Document Metadata and Workflow Configuration** in **DMS Administration**; then, click ***Document Types*** to open the **Document Types** page.

2. Scroll down the page to the **Existing document types** section to view a list of the document types that exist in the system.

3. Click the **Edit** link for the relevant document type (the document type where you want to associate or disassociate fieldsets) to open the **Document Type: [document type name]** editing page.
   Note: *The fieldsets currently associated with this document type are displayed in the* ***Linked Fieldsets*** *section on this page.*

4. **Do you want to...**

   - **disassociate one or more currently associated (linked) fieldsets?** In the **Linked Fieldsets** section on this page, select the check box adjacent to each fieldset that you want to disassociate from this document type; then, click **Disassociate Fieldsets**.
     Note: *A system message verifies the disassociating of the selected fieldsets from this document type.*

   - **associate fieldsets with this document type?** Select one or more fieldsets in the **Available Fieldsets** pick list; then, click **Associate Fieldsets**.
     Note: *Hold down the keyboard* ***Ctrl*** *key while selecting menu options to multi-select from this menu.*
     Note: *A system message verifies the association of the fieldset/s with this document type.*

3.4.16.2 Fieldsets

A **Fieldset** is a collection of one or more contextually related fields - e.g. fieldset 'customer details' may contain a collection of fields that all relate to 'customer details', such as: Name, Address, Telephone number, etc.

Note: *KnowledgeTree auto-generates an editable system name (namespace) for every fieldset. Plugins use this namespace to call the fieldset, and to control how the fieldset works. For more information on developing Plugins for KnowledgeTree, see the KnowledgeTree Wiki at http://support.knowledgetree.com/confluence/*

Fieldsets and their fields are added and edited through KnowledgeTree's web interface, in **DMS Administration - Document Metadata and Workflow Configuration - Document Fieldsets**.

When adding new document types, you need to specify the fieldsets that are linked to this document type. Fieldsets may be associated with a specific document type, or with all document types in the system.

When adding documents, users are required to specify the document type, which automatically loads the fieldset and fields associated with the document type, and the user may then add the document metadata as described by the fields that display onscreen. Some fields and fieldsets are 'required' and the user will not be able to complete a document upload process without adding the appropriate metadata. If a fieldset or field is not marked as 'required', adding metadata is optional.

Generic Fieldsets

A fieldset may be defined as type-specific or generic. Type-specific fieldsets are associated only with specified document types. For example, you may want to add a fieldset called 'customer details', and associate it with the 'Invoice' document type, the 'Order' document type, and the 'Correspondence' document type.

Generic fieldsets are automatically associated with each document type you add to KnowledgeTree.

Fieldset Types

KnowledgeTree provides two default fieldset types:

- Normal Fieldsets
  A 'normal' fieldset may contain a variety of field types, e.g. one or more, or a combination of Lookup fields, Tree fields, and/or Normal fields

- Conditional Fieldsets
  KnowledgeTree Commercial Editions Only
  A conditional fieldset is a metadata filtering tool that comprises two or more inter-related Lookup fields, which are ordered in a hierarchy, where a user-selected value in a higher level field controls the values that display in lower level (dependent) fields.

  When setting up conditional metadata in the system, the KnowledgeTree administrator predefines the rules for the display of conditional metadata fields - e.g. select 'Europe', see lookup field showing countries on the continent of Europe; or, select 'Book', and see lookup field showing, for example, 'content type', e.g. Fiction, Non-Fiction; then, select 'Fiction' to see an associated list of lookup values, or select 'Non-Fiction' to see a different list of lookup values. You need to enable the conditional metadata plugin to use this fieldset.

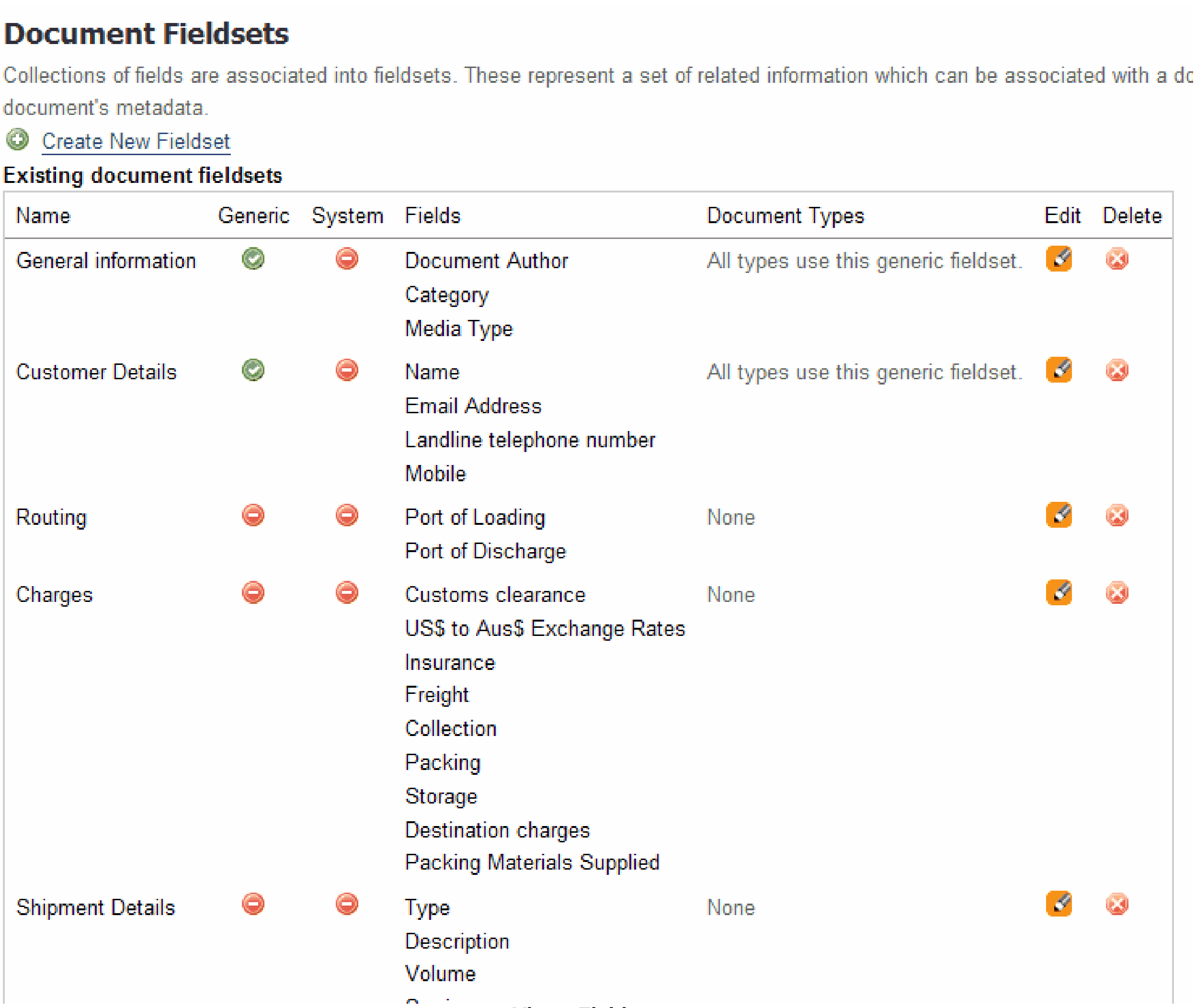
3.4.16.2.1 Viewing Existing Fieldsets

This procedure displays fieldsets that exist in your system.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration** - **Document Metadata and Workflow Configuration** - **Document Fieldsets**.

2. View existing document fieldsets listed in the table on **Document Fieldsets** page. The table displays the following information for each fieldset:
   - fieldset name
   - whether the fieldset is generic
   - a list of fields in the fieldset (if any)
   - document types using the fieldset
   - Edit and Delete icons - to add or edit field, or to edit the fieldset, click the edit icon; to delete the fieldset, click the delete icon



Document Fieldsets

Collections of fields are associated into fieldsets. These represent a set of related information which can be associated with a dc document's metadata.

Create New Fieldset

Existing document fieldsets

Name	Generic	System	Fields	Document Types	Edit	Delete
General information			Document Author Category Media Type	All types use this generic fieldset.		
Customer Details			Name Email Address Landline telephone number Mobile	All types use this generic fieldset.		
Routing			Port of Loading Port of Discharge	None		
Charges			Customs clearance US$ to Aus$ Exchange Rates Insurance Freight Collection Packing Storage Destination charges Packing Materials Supplied	None		
Shipment Details			Type Description Volume	None		

View Fieldsets

3.4.16.2.2 Adding New Fieldsets

This procedure adds new normal or conditional fieldsets.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration** - **Document Metadata and Workflow Configuration** - **Document Fieldsets**.

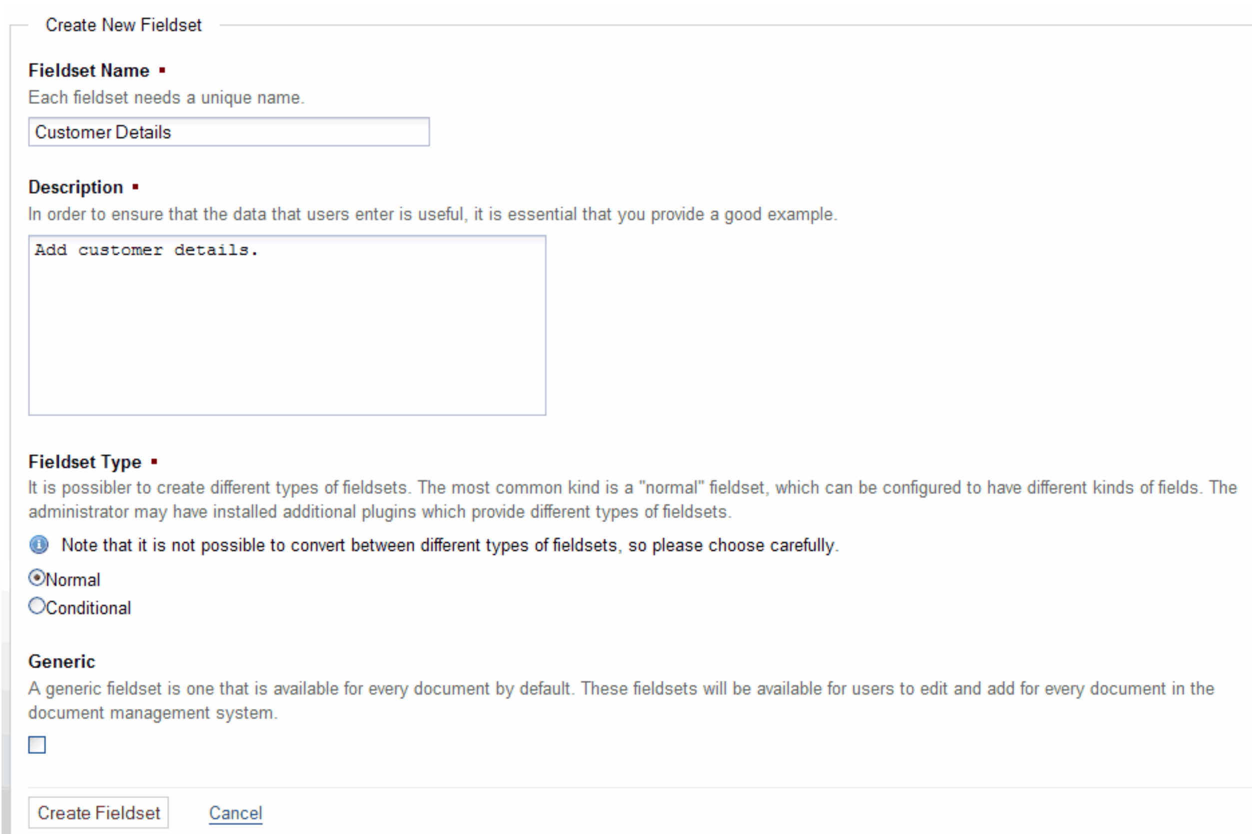
2. Click ***Create New Fieldset***.

3. Add basic details for this fieldset: enter a fieldset name, provide a description of the information stored in the fieldset.

4. In the **Fieldset Type** section, select **Normal**, or **Conditional** to define the fieldset type.

5. Click ***Create Fieldset***.

Note: *If this is a conditional fieldset, go to [Setting up Conditional Fieldsets] to complete this procedure. If this is a normal fieldset, go to [Adding Fields] to complete this procedure.*



Adding New Fieldsets

3.4.16.2.3 Editing / Deleting Fieldsets

This procedure edits and deletes existing Fieldsets.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, to open the Document Fieldsets section, click **DMS Administration** - **Document Metadata and Workflow Configuration** - **Document Fieldsets**.

2. Locate the relevant fieldset in the table in the **Existing document fieldsets** section.

3. **Do you want to ...**
   - **remove a fieldset?** Click the delete icon for the fieldset.

   - **edit a fieldset?** Click the edit icon for the relevant fieldset. The system opens the Edit Fieldset page, where you can: edit the fieldset name, description, and generic/non-generic status; and add, edit, and delete fields. If this is a conditional fieldsets, you can also configure the fieldset (order fields and set up fieldset rules.

3.4.16.2.4 Setting Up Conditional Fieldsets

This procedure sets up (configures) a conditional fieldset.

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

Setting up a conditional fieldset involves the following tasks:

- Add lookup fields and their values to the fieldset
- Set a master field
- Order the fields into a control field / dependent field(s) relationship
- Define conditional behaviour (set up fieldset rules) - each lookup value in a control field is configured to display a pre-defined collection of lookup values in one or more dependent fields
- Test the conditional fieldset

Pre-requisites:

- Add the conditional fieldset
- Plan the fields, and the structure of the fieldset

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, to open the Document Fieldsets section, click ***DMS Administration*** - ***Document Metadata and Workflow Configuration*** - ***Document Fieldsets***.

2. On the **Document Fieldsets** page, in the **Existing document fieldsets** table, locate the fieldset you want to work with; then, to open the **Edit Fieldset [fieldset name]** page then, click the ***edit*** icon for the relevant fieldset.

3. Add Lookup fields and their lookup values:
   3.1. On the **Edit Fieldset [fieldset name]** page, click ***Add New Field***.
   3.2. On the **Add New Field** page, add a field name, field description, and define whether

the field is 'required'. Click ***Add Field***.

3.3. To add lookup values to the new field, click ***Add Lookups***; then, on the **Add Lookup Values** page, add lookup values (one per line). When you're done, click ***Add Lookups***. The **Edit Fieldset [fieldset name]** page re-opens.

3.4. To add more lookup fields, repeat this step.

4. Set one lookup field as the 'master' field:

   Note: *A 'master' field is the first field presented to users. User-selected lookup values in the master field determine the display of subsequent fields.*

4.1. On the **Edit Fieldset [fieldset name]** page, click ***Manage Field Ordering***.

4.2. On the **Manage Field Ordering** page, select a lookup field; then, click ***Set Master Field***. The system re-opens the **Edit Fieldset [fieldset name]** page.

5. Define the lookup fields controlled by the master field:

5.1. Click ***Manage Field Ordering***. On the **Manage Field Ordering** page, in the **Order Fields** section, select one or more lookup fields in the second drop-down (the first drop-down is the control field, and by default, contains only the master field the first time you order fields).

5.2. When you're done, click ***Order***. The system re-opens the **Edit Fieldset [fieldset name]** page.

6. Arrange field order relationship (control field / dependent field) for the rest of the lookup fields in the fieldset:

6.1. On the **Edit Fieldset [fieldset name]** page, click ***Manage Field Ordering***. On the **Manage Field Ordering** page, select a field in the control drop-down (the first drop-down); then, select a dependent field (one or more) in the second drop-down. When you're done, click ***Order***. The system re-opens the **Edit Fieldset [fieldset name]** page.

6.2. To order more fields, repeat this step.

7. View existing field ordering:

7.1. Click ***Manage Field Ordering*** on the **Edit Fieldset [fieldset name]** page. A summary of the current field order displays in the **Existing ordering** section on the **Manage Field Ordering** page.

7.2. To change the field ordering, go back to step 4 to reset the master field, then re-order all the lookup fields. Resetting the master fields deletes the existing field order.

7.3. If you're satisfied with the existing field order, return to the **Edit Fieldset ...** page. To do this, click on the fieldset name in the breadcrumb.

8. Set up the fieldset rules:

   Note: *This step assigns behaviour to lookup values (values in control fields define the lookups that display in dependent fields):*

8.1. On the **Edit Fieldset [fieldset name]** page, click ***Manage Conditional Behaviours***.

8.2. On the **Editing Fieldset Rules (Simple)** page, select a value in a control field (e.g. the 'master' field is the first control field); then, select dependent lookup values in the fields that are dependent on the master field. Click ***save this dependency***. Repeat this step for each lookup value in the control field.

8.3. Click ***edit field*** to set up the control/dependent behaviour for the next set of fields.

8.4. Select a value in the control field; then, select one or more values in the dependent field.

8.5. When you're done, click ***save this dependency***.

8.6. Repeat this step for each lookup value in the control field.

8.7. Repeat this step until all control values are assigned behaviours.

8.8. When you're done, click the fieldset name in the breadcrumb to return to the **Edit Fieldset [fieldset name]** page.

9. Test the conditional fieldset:
   9.1. On the **Edit Fieldset [fieldset name]** page, click ***View Overview***.
   9.2. In the **Test Instance** section on the page you can click through the fieldset you set up to ensure it works the way you want it to.
   9.3. To keep the existing configuration, use the breadcrumb to navigate away from the page; alternatively, to edit the fieldset, click the fieldset name in the breadcrumb to return to the **Edit Fieldset [fieldset name]** page where you can add, edit, or delete fields and/or their lookup values, re-order the fields (you will need to reset the master to re-order the fields), change conditional behaviour (fieldset rules), or change fieldset details.

3.4.16.2.5 Fields

Fields are the smallest metadata collection point in KnowledgeTree. Fields include the text fields, pick lists and menus that allow a user to provide information about the content that is uploaded to the repository.

KnowledgeTree uses fields to group sets of related information into one or more **fieldsets**. The fieldsets are associated with **document types** in the system. The collection of fields, fieldsets, and document types - plus the folder structure and, optionally, permissions - comprise the system's **metadata** structure.

KnowledgeTree's **Search** function operates on this metadata layer. metadata works on the search function. Search relies on the addition of appropriate metadata in the system to locate and retrieve content in the repository.

There are three classes of custom fields in KnowledgeTree:

- Normal - stores text metadata, such as an invoice code
- Lookup - allows the selection of appropriate information from a predefined set of options (lookup values)
- Tree - allows the selection of a metadata value by browsing a tree structure

Note: *Fields are configurable and editable only within the fieldset where they exist. Tree fields and Lookup fields require additional configuration steps to Normal (String) fields.*

3.4.16.2.5.1 Viewing / Adding Fields

This procedure displays existing fields in a selected fieldset, and adds new fields to a fieldset.

Note: *Fields are configurable and editable only within the fieldset where they exist.*

Perform the following steps:

1. Use your administrator login credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration - Document Metadata and Workflow Configuration - Document Fieldsets** to open the **Document Fieldsets** configuration interface.

2. **Do you want to ...**
   - **view fields that are currently defined for each fieldset in the system?** Scroll down this page to the list in the **Existing document fieldsets** section. Adjacent to each

fieldset listed in the table is a list of the fields that exist in the fieldset.

- **add a new field for an existing fieldset?** Click the **Edit** icon for the relevant fieldset to open the **Edit Fieldset** page for the selected fieldset. Go to step 3.

3. Click **Add New Field** to open the **Add New Field** page.

4. Define a name for the field in the **Field name** field; then, in the **Description** field, provide a short paragraph that clearly explains the type of information required in the field.

5. Select the **Field Type** radio button. Is this a ...
   - **normal text input field?** Select the **Normal (String)** radio button; then, go to step 6.
   - **lookup field?** Select the **Lookup** radio button; then, go to
   - **Tree field?**

6. **Is this a field that must be completed?**
   - **Yes.** Select the **Required** check box.
   - **No.** Leave the **Required** check box unselected.

7. Click **Add Field** to open the **Manage Field: [field name**] page, where you can change any of the detail you defined when creating the field. Click **Update Field** to save the changes.

8. **Do you want to add another field for this fieldset?**
   - **Yes.** Click on the fieldset name in the bread-crumb navigation at the top of the page to re-open the **Edit Fieldset: [fieldset name]** page. Go to step 4.

   - **No.** Exit this procedure.

3.4.16.2.5.2 Adding Tree Fields

This procedure adds a **Tree** field in a fieldset.

⊟ What are Tree Fields?
A tree field is a type of lookup field, except that the lookup values are arranged in a hierarchy:
Example
Root: e.g. Continents
Subcategory: e.g. Countries
Lower level subcategories: e.g. States

Perform the following steps:

1. Use your administrator login credentials to log in to KnowledgeTree's web interface; then, open the fieldset configuration interface for the relevant fieldset (the fieldset where you need to add the field).
   Note: *See* *View existing / adding new fields* *for more information about this task.*

2. On the **Add New Field** page, define a name for the field in the **Field name** field; then, in the **Description** field, provide a short paragraph that clearly explains the type of information required in the field.

3. Select the **Tree** radio button in the **Field Type** section.

4. **Is this a 'required' field?**
   - **Yes.** Select the **Required** check box.
   - **No.** Leave the **Required** check box unselected.

5. Click **Add Field** to open the **Manage Field: [field name**] page.

6. Click **Add Lookup Values** to open the **Add Lookup Values** page. In the **Lookup Values** field, define lookup values - one or more; then, click **Add Lookups** to save this information and to re-open the **Manage Field: [field name]** page.
7. Click **Manage Lookup Values** to open the **Manage Lookups for [lookup field name]** page.

8. **Do you want to ...**
   - **enable or disable a lookup value as a selectable option when editing or adding documents in the repository?** Select the check box adjacent to each relevant lookup value; then, click **Toggle enabled state** to change the current state of the lookup value.

   - **define whether any of the lookup values are 'sticky'?** Select the check box adjacent to each lookup value that needs to be defined as either sticky or non sticky; then, click **Toggle stickiness** to change the selected lookup values current 'Sticky' state.
     Note: *Sticky lookup values cannot be removed by external plugins that control a lookup set.*

   - **delete a lookup value?** Select the relevant lookup value; then, click **Delete**.

9. Click the fieldset name in the bread-crumb navigation at the top of the page to return to the **Manage Field: [field name]** page.

10. Click **Manage Lookup Tree Structure** to open the **Edit Lookup Tree: [lookup tree field name]** page.

11. **Do you want to ...**
    - **define a subcategory for the root?** Click **attach keywords** adjacent to the **Root** in the **Preview** section. Define a subcategory for the root; then, click **add new subcategory**. Repeat this step for each additional subcategory you're adding to the Root.

    - **define a subcategory in a subcategory?** Click **attach keywords** adjacent to the relevant subcategory below the Root. Repeat this step for each additional subcategory you're adding in another subcategory.
      Note: *Expand the root or a subcategory to display the configured options.*

3.4.16.2.5.3 Adding Lookup Fields

This procedure adds a **Lookup** field in a fieldset.

Perform the following steps:

1. Use your administrator login credentials to open the **Add New Field** page for the relevant Fieldset - i.e. the Fieldset where you're adding a new field.
   Note: *See View existing / adding new fields for more information with this task.*

2. On the **Add New Field** page, define a name for the field in the **Field name** field; then, in the **Description** field, provide a short paragraph that clearly explains the type of information required in the field.

3. Select the **Lookup** radio button in the **Field Type** section.

4. **Is this a required field?**
   - **Yes.** Select the **Required** check box.
   - **No.** Leave the **Required** check box unselected.

5. Click **Add Field** to open the **Manage Field: [field name**] page; then, click **Add Lookup Values** in the **Extra Options** section to open the **Add Lookup Values** page.

6. In the **Lookup Values** field, define lookup values - one or more; then, click **Add Lookups** to save this information and to re-open the **Manage Field: [field name]** page.

7. In the **Extra Options** section, click **Manage Lookup Values** to open the **Manage Lookups for [lookup field name]** page.

8. **Do you want to ...**
   - **enable or disable a lookup value as a selectable option when editing or adding documents in the repository?** Select the check box adjacent to each relevant lookup value; then, click **Toggle enabled state** to change the current state of the lookup value.

   - **define whether any of the lookup values are 'sticky'?** Select the check box adjacent to each lookup value that needs to be defined as either sticky or non sticky; then, click **Toggle stickiness** to change the selected lookup values current 'Sticky' state.
     Note: *Sticky lookup values cannot be removed by external plugins that control a lookup set.*

   - **delete a lookup value?** Select the relevant lookup value; then, click **Delete**.

   - **exit this procedure?** Click on the Fieldset name in the bread-crumb navigation at the top of the page to return to the Edit Fieldset page.

3.4.16.2.5.4 Editing / Deleting Fields

This procedure Edits and Deletes a field from a fieldset.

Perform the following steps:

1. Use your administrator login credentials to open the **Document Metadata and Workflow Configuration** page in **DMS Administration**; then, click **Document Fieldsets** to open the **Document Fieldsets** management page.

2. In the **Existing document fieldsets** section on this page, locate the fieldset that contains the field/s you want to edit or delete; then, click the **Edit** icon for the relevant fieldset to open the **Edit Fieldset: [fieldset name]** editing page.

3. Scroll down the page to the **Additional Information** section to view fields that exist for this fieldset. The table provides the following information about each field: field name; type of field (whether normal, lookup, or tree). This section also provides access to field management functionality - Edit, and Delete.

4. **Do you want to ...**
   - **change any information in the field?** Click the ***Edit*** icon for the relevant field to open the **Manage Field: [field name]** page. Make the required changes; then, click **Update Field**.
     Note: *For more information about the configuration options on the field editing pages, see Adding Fields.*

   - **remove this field as a member of this fieldset?** Click the ***Delete*** icon for the relevant field. Click ***OK*** on the system message that asks you to confirm the field deletion.

3.4.16.3 Viewing / Adding Email Document Types

This procedure displays existing email document types and adds new email document types.

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

⊟ Why use Email Document Types?
KnowledgeTree uses the predefined metadata fields in Email document types to gather relevant metadata for emails saved from Microsoft Outlook to KnowledgeTree. This metadata is stored with emails to facilitate their efficient retrieval from KnowledgeTree.

Email document types are designed for use with **KnowledgeTree™ Outlook Integration** - a component in the KnowledgeTree Client Tools for Windows toolset.

Note: *KnowledgeTree Outlook Integration allows KnowledgeTree Commercial users to save emails and attachments from Microsoft Outlook to KnowledgeTree, and to attach files directly from KnowledgeTree to outgoing email messages. See the KnowledgeTree User Manual for information on using KnowledgeTree Outlook Integration.*

The Email document type contains a default fieldset with the following metadata fields:

- Sender Email
- Sender Name
- Cc

- Send Date
- Subject
- Size

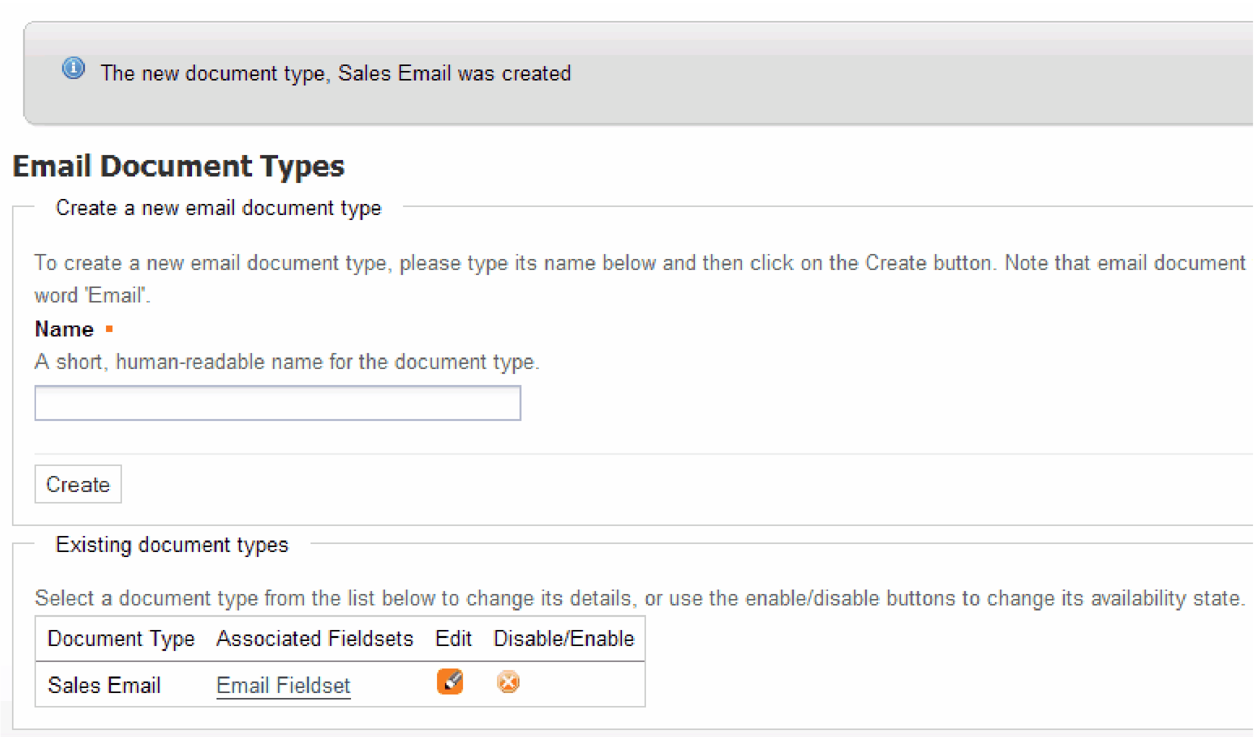
Note: *Although the default Email document type fieldset is editable, but we strongly recommend that you do not change the pre-configured settings or field names. Changing the defaults may prevent the gathering of useful metadata for saved emails.*

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration - Document Metadata and Workflow Configuration - Email Document Types** to open the Email Document Types configuration interface.

2. **Do you want to ...**
   - **view existing email document types?** Scroll down to the **Existing document types** section at the bottom of this page to view a list of the email document types that exist in the system.

   - **add a new email document type?** Define a name for the new email document type in the **Name** field; then, click **Create**.
     Note: *Email document type names must end with the word 'email', e.g. Order Email, or Records Email.*



3.4.16.4 Configuring Workflows

This chapter provides information and instructions for working with Workflows in KnowledgeTree.

Note: *Please see the topic, Introduction to KnowledgeTree Workflows, (in this Manual) to learn more about the Workflows concept KnowledgeTree.*

How to set up a Workflow

Before you begin ...

The first step to setting up a useful workflow is to clearly define the business process that you want to automate in your document management system workflow. Start by giving your workflow a user-friendly, descriptive name; then,

- Map out the states in your workflow

Note: *Typically, a state is the point at the end of one task and prior to the start of the next task - i. e. a milestone in the document life-cycle, and the result of the action in the Transition.*

- Define the transitions that will lead to the states

Note: *Transitions are the actions that result in the document moving from one state to the next state.*

- Define security requirements at various states and transitions in the workflow

Note: *You may want only users of a certain Role to perform some Transitions (e.g. perhaps only users assigned to the role 'Manager' may approve a document at a certain point); Or, perhaps only users with appropriate permissions may perform certain transitions, e.g. a user who has submitted a leave application is not typically allowed to transition the document to the 'Approved' state.*

Getting Started - adding the workflow to KnowledgeTree:

1. Add the workflow to KnowledgeTree.

This involves: adding a workflow name, adding states, adding transitions, connecting transitions to states

2. Configure security (permissions) by workflow state:

- assign permissions (including document actions) that are allowed or disallowed by each state in the workflow
- allocate state-controlled permissions to groups and roles

3. Set up Notifications per workflow state, if required. This allows a notice to be sent to selected recipients when a document reaches a certain state in the workflow.

4. Configure the workflow transitions:

- Add transition restrictions (set up guard triggers on the transition) - these are various types of restrictions that apply on the transition
- add transition effects (actions)- what happens after the transition occurs (e.g. perhaps the document moves to a particular folder)

Working with existing workflows

Having added and configured the workflow, you can:

- View and edit your existing workflows: change the name of the workflow, select a starting state, enable or disable the workflow

- Copy the settings of an existing workflow to create a new workflow

- Change the connections set up between States and Transitions in an existing workflow (Edit workflow process)

- Edit existing states and add new states in a currently selected, existing workflow (edit the name of the state and state effects - security and notifications)
- Add new transitions to an existing workflow, or edit transitions in a workflow
- View permissions currently controlled by states in a workflow, assign and remove permissions controlled by states, and define / remove actions blocked by states
- View, edit, or delete existing transition restrictions
- View and edit existing notifications
- View, edit, delete, and add transition effects (actions)
- Enable and disable the automatic assignment of workflows
- Allocate workflows to document types

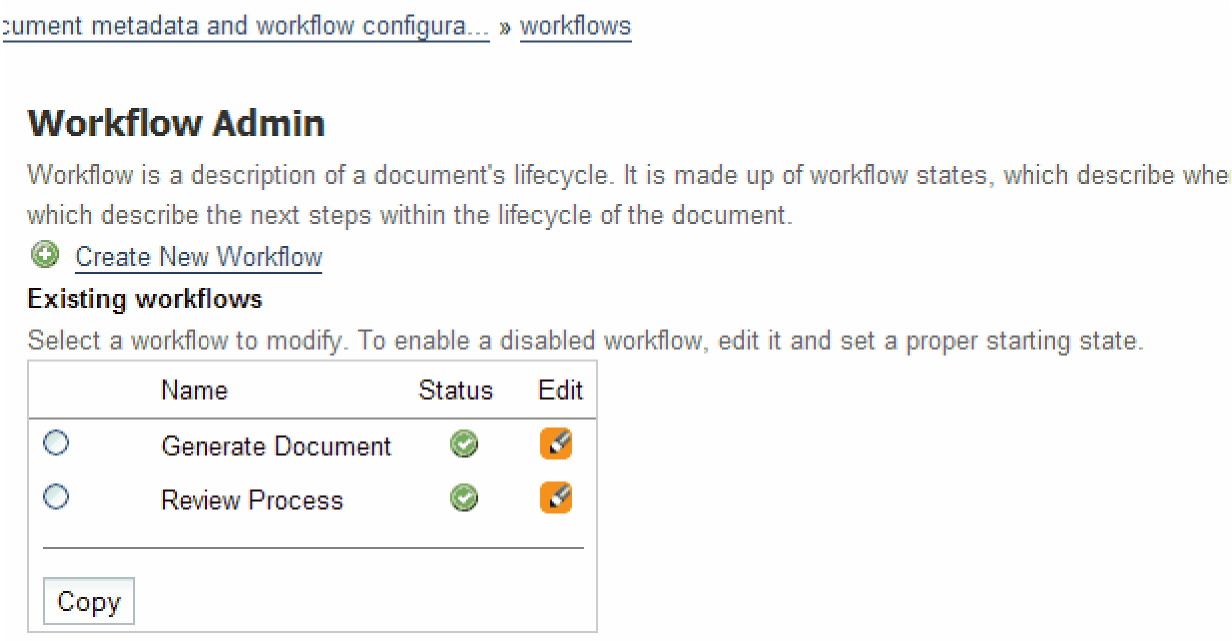
3.4.16.4.1 Adding Workflows

This procedure adds a new workflow.

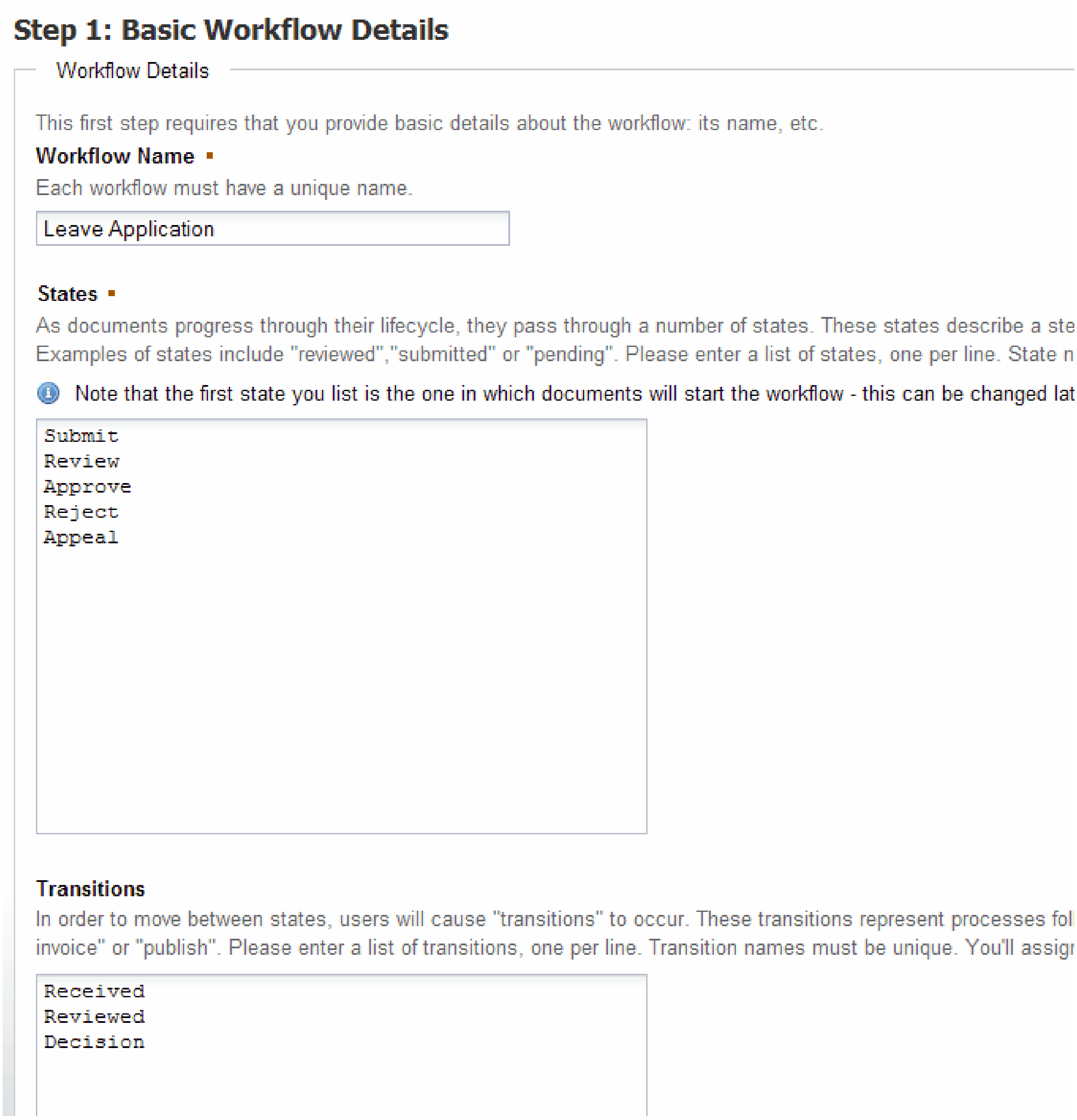
Note: *You can create a brand new workflow, or copy, then edit, the settings of an existing workflow to create a new workflow. See Also: Copying a Workflow.*

Pre-requisites:
- Plan the workflow.

Perform the following steps:
1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration - Document Metadata and Workflow Configuration - Workflows** to open the **Workflow Admin** page.

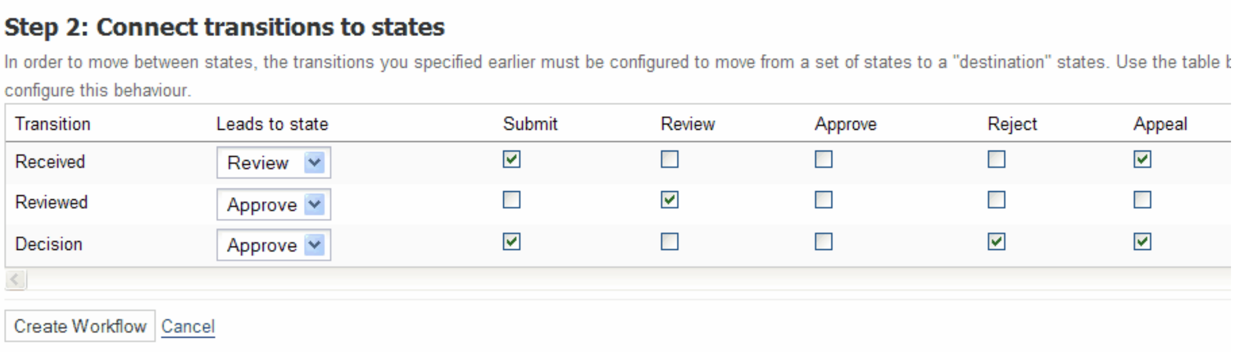


2. Click ***Create New Workflow***.
3. Define basic workflow details:
   3.1. Define a workflow name in the **Workflow Name** field.
   3.2. Define workflow *States* in the **States** field - add unique state names, one per line.
   Note: *By default, the first state listed in this field becomes the starting state.*
      3.2.1. Define workflow *Transitions* in the **Transitions** field - add unique transition names, one per line.



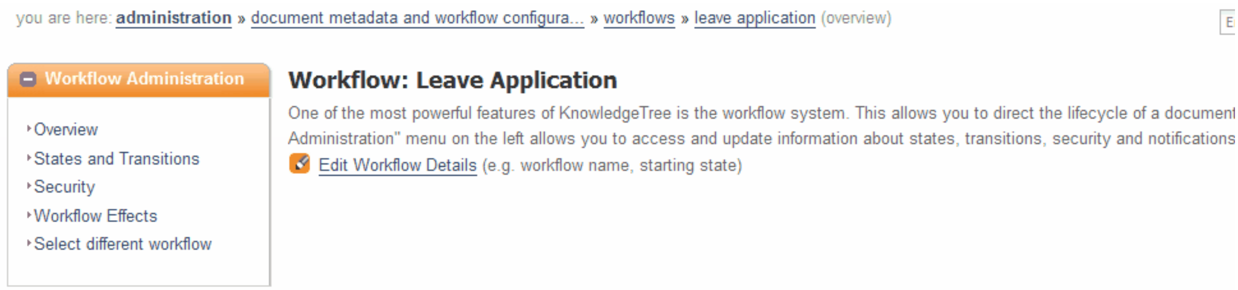
3.3. Click ***Next***.

4. Connect the transitions to states - for each *Transition* listed in the table, select a destination state; then, select one or more source states.
Note: *You can move a document in a workflow to a destination state from more than one source states.*



5. Click ***Create Workflow***.

6. The **Workflow: [workflow name]** page opens. Here you can edit the basic details of the workflow, or access workflow management functions in the **Workflow Administration** menu.



7. To complete the workflow configuration, you need to ...

- select a starting state
- configure security by state.

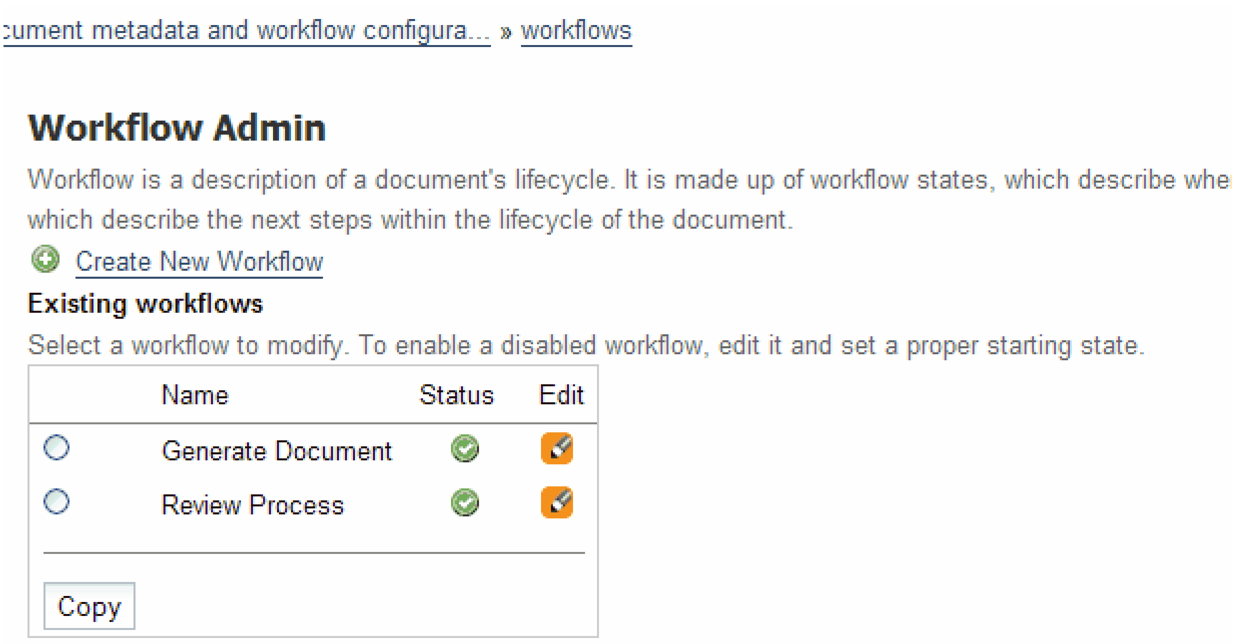
3.4.16.4.2 Configuring Security by Workflow State

This procedure displays permissions controlled by the states in a currently selected workflow, assigns and removes permissions controlled by state, and defines the document actions to block by workflow state.

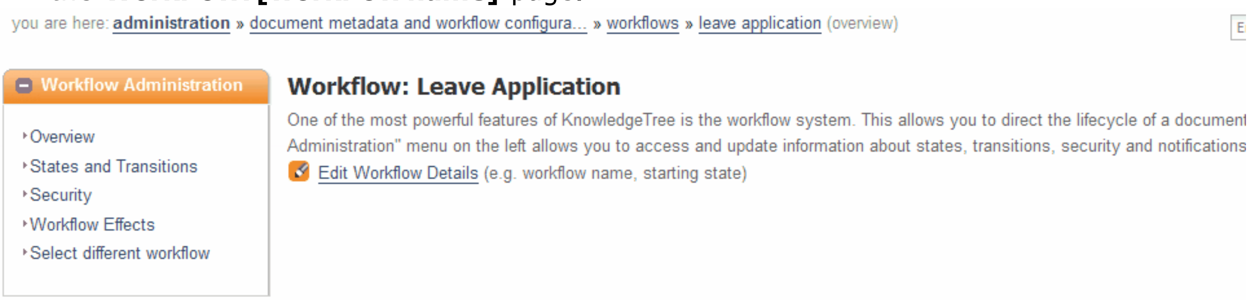
Note: *Permissions configured through workflow states override folder permissions.*

Perform the following steps:

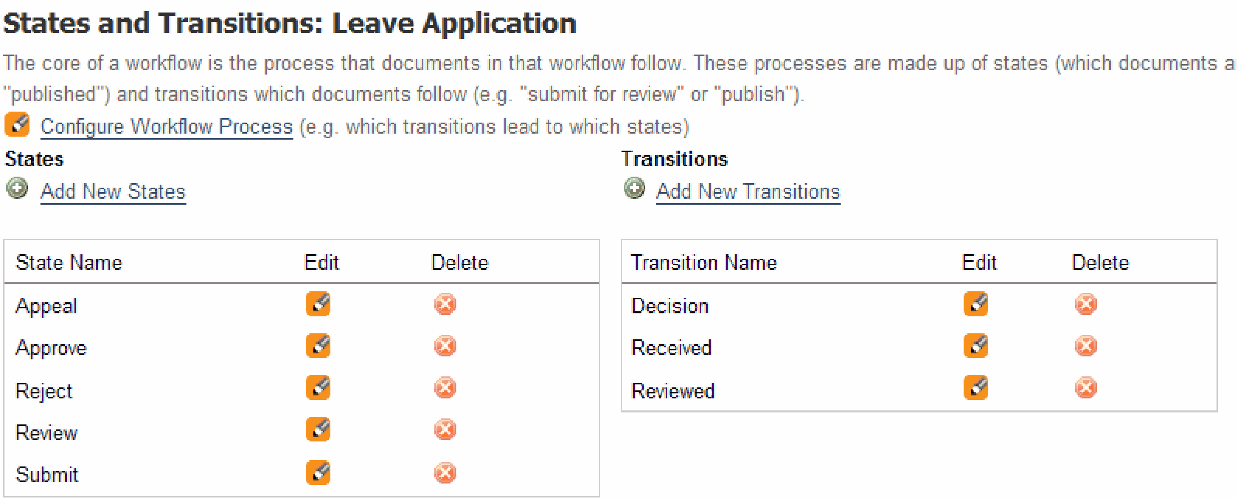
1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration - Document Metadata and Workflow Configuration - Workflows** to open the **Workflow Admin** page.



2. In the **Existing workflows** section, click the ***Edit*** icon for the relevant workflow to open the **Workflow: [workflow name]** page.

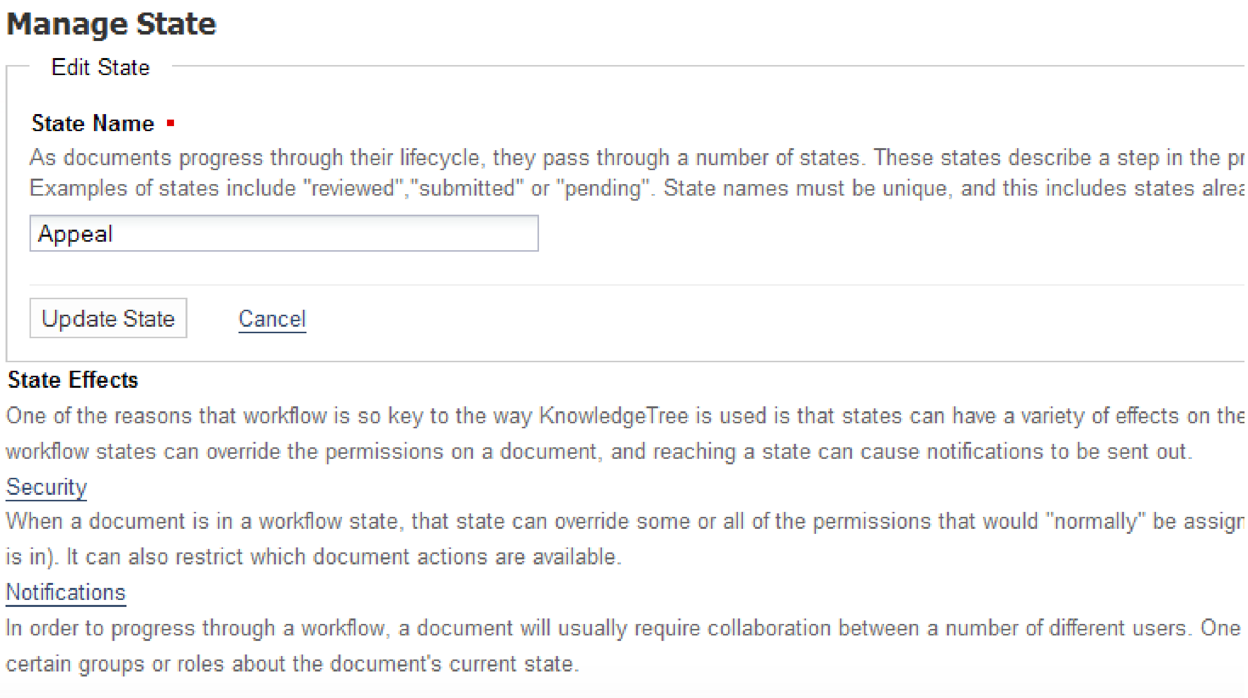


3. In the **Workflow Administration** menu, click ***States and Transitions***.

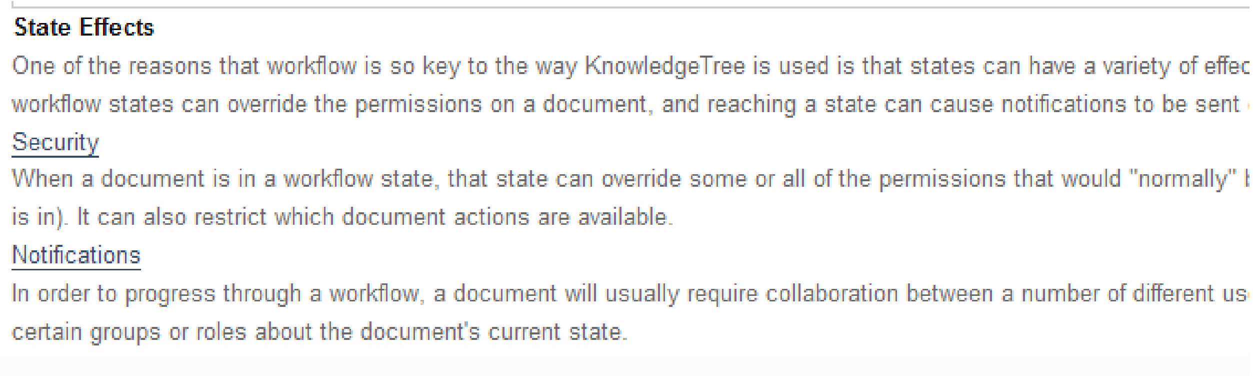


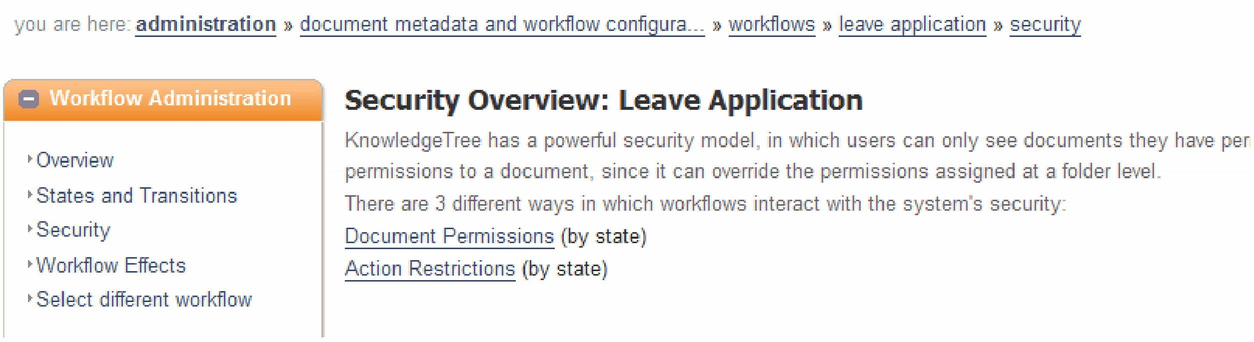
4. View the list of states in the table; then, for the relevant state where you need to

configure permissions, click the ***Edit*** icon to open the **Manage State** page.



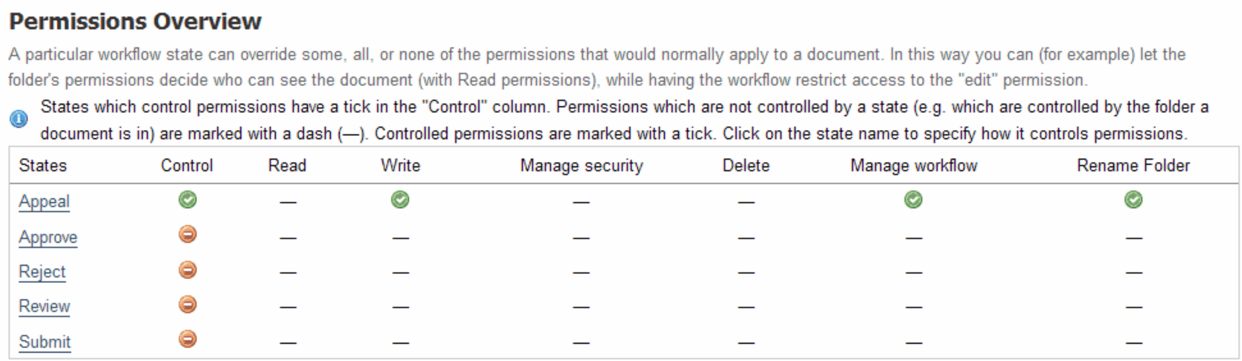
5. In the **State Effects** section, click ***Security*** to open the **Security Overview: [workflow name]** page.





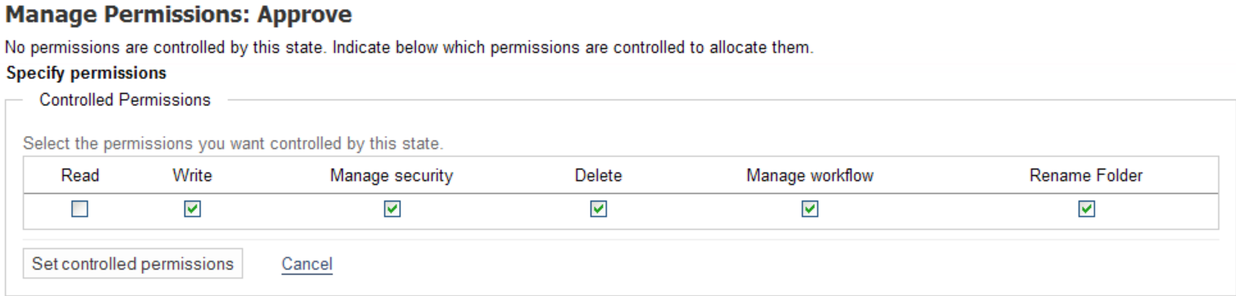
6. The following security settings are configurable for the workflow states:
   - **View permissions controlled by state.** Click ***Document Permissions***. The table displays how permissions are controlled by each state in the workflow (if already

configured). A tick in the **Control** column for each state confirms a state's control over permissions.



View permissions controlled by state

- **Assign permissions to control by a state.** Click ***Document Permissions***. On **Permissions Overview**, click on the relevant state name in the **States** column to open **Manage Permissions: [state name]** page. Select permissions to control by this state; then, click ***Set controlled permissions***. To allocate these permissions to groups and roles, click ***Allocate permissions***.



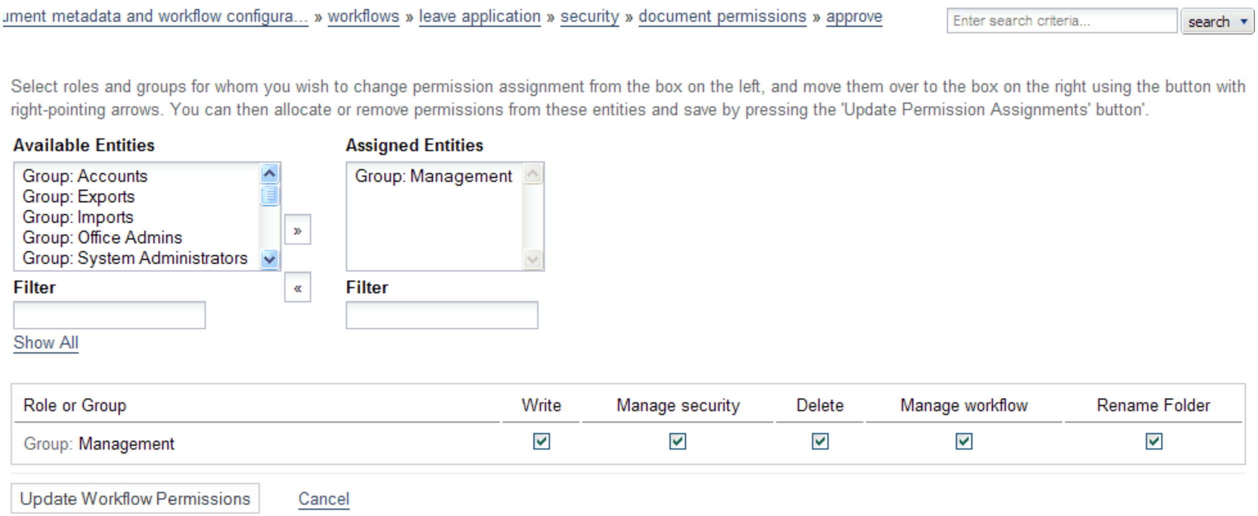
Assign permissions by state

Allocate state permissions to groups/roles

- **Allocate permissions controlled by a state, to roles and groups**. Click ***Document Permissions***. Click on the state name in the **State** column to open **Manage Permissions: [state name]** page. Click ***Allocate permissions***. Populate the **Assigned entities** field by adding groups and roles from the **Available Entities** field. Remove permissions from groups and roles by moving these groups and roles from the

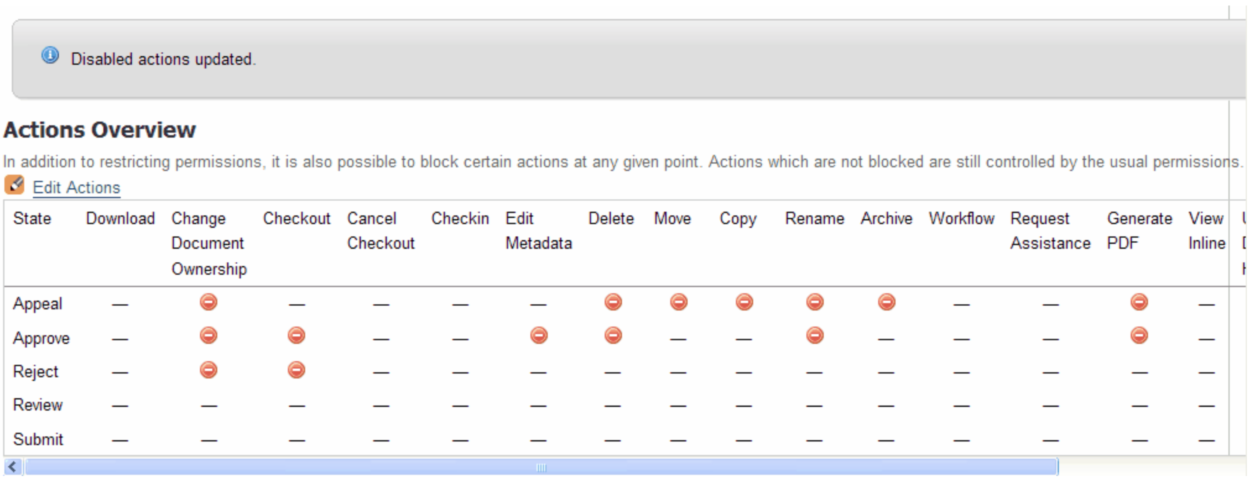
Assigned Entities field to the **Available Entities** field. Roles and groups added to the **Assigned Entities** field are displayed in the table at the bottom of this page. For each role and group where state controlled permissions are allocated, select the check box - one or more - to define the permission allocated to the role or group. When you're done, click **Update Workflow Permissions**.

Note: *To populate the **Available Entities** field, use the **Show All** button, or enter criteria to filter the data returned. To populate the **Assigned Entities** field, select groups and roles in **Available Entities**; then, click the right-pointing arrow to move these entities to the **Assigned Entities** field. To remove groups and roles from the **Assigned Entities** field to the **Available Entities** field, select groups and roles in **Assigned Entities**; then, click the left-pointing arrow to move these entities to the **Available Entities** field.*



Allocate state permissions to groups/roles

- **View document actions blocked by state.** Click ***Action Restrictions***. A table on the **Actions Overview** page lists the available document actions in the system, and it lists the states in this workflow; blocked actions are unavailable on a document that reaches this state in the workflow.

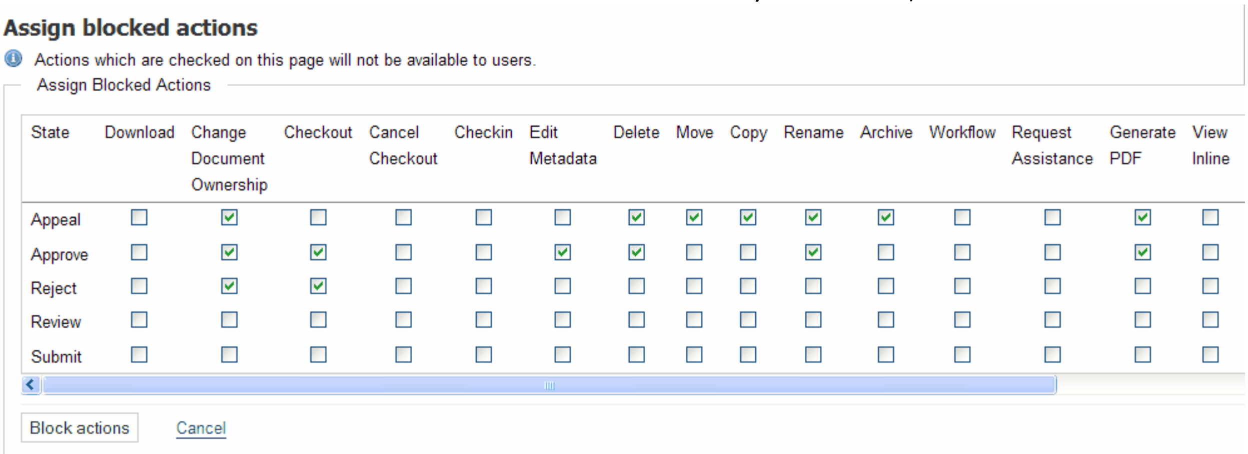


State	Download	Change Document Ownership	Checkout	Cancel Checkout	Checkin	Edit Metadata	Delete	Move	Copy	Rename	Archive	Workflow	Request Assistance	Generate PDF	View Inline
Appeal	—	⊖	—	—	—	—	⊖	⊖	⊖	⊖	⊖	—	—	⊖	—
Approve	—	⊖	⊖	—	—	⊖	⊖	—	—	⊖	—	—	—	⊖	—
Reject	—	⊖	⊖	—	—	—	—	—	—	—	—	—	—	—	—
Review	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
Submit	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—

View blocked actions

- **Block or unblock document actions by state.** Click ***Action Restrictions***. On the

Actions Overview page, click **Edit Actions** to open the **Assign blocked actions** page. For each state in the table, select the check box at each document action that you want to block on a document that reaches this state in the workflow. Deselect the check box for each document action that you want to make available on a document that has reached this state in the workflow. When you're done, click **Block actions**.



State	Download	Change Document Ownership	Checkout	Cancel Checkout	Checkin	Edit Metadata	Delete	Move	Copy	Rename	Archive	Workflow	Request Assistance	Generate PDF	View Inline
Appeal	☐	☑	☐	☐	☐	☐	☑	☑	☑	☑	☑	☐	☐	☑	☐
Approve	☐	☑	☑	☐	☐	☑	☑	☐	☐	☑	☐	☐	☐	☑	☐
Reject	☐	☑	☑	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Review	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
Submit	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Assign blocked actions

3.4.16.4.3 Adding / Editing Notifications on Workflow States

This procedures adds and edits notifications by workflow state.

Note: *Setting up Notifications allows selected recipients to be notified when documents reach a specified workflow state.*

Perform the following steps:

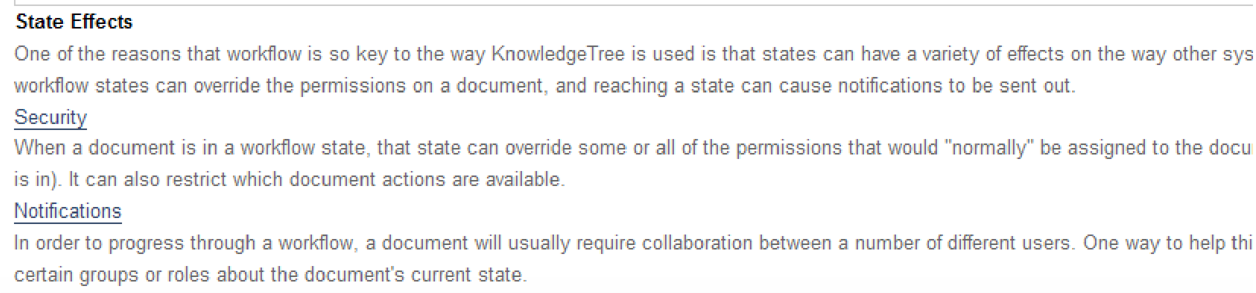
1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration - Document Metadata and Workflow Configuration - Workflows** to open the **Workflow Admin** page.

2. In the **Existing workflows** section, locate the workflow you're configuring; then, click the ***Edit*** icon for this workflow to open the **Workflow: [workflow name]** page.

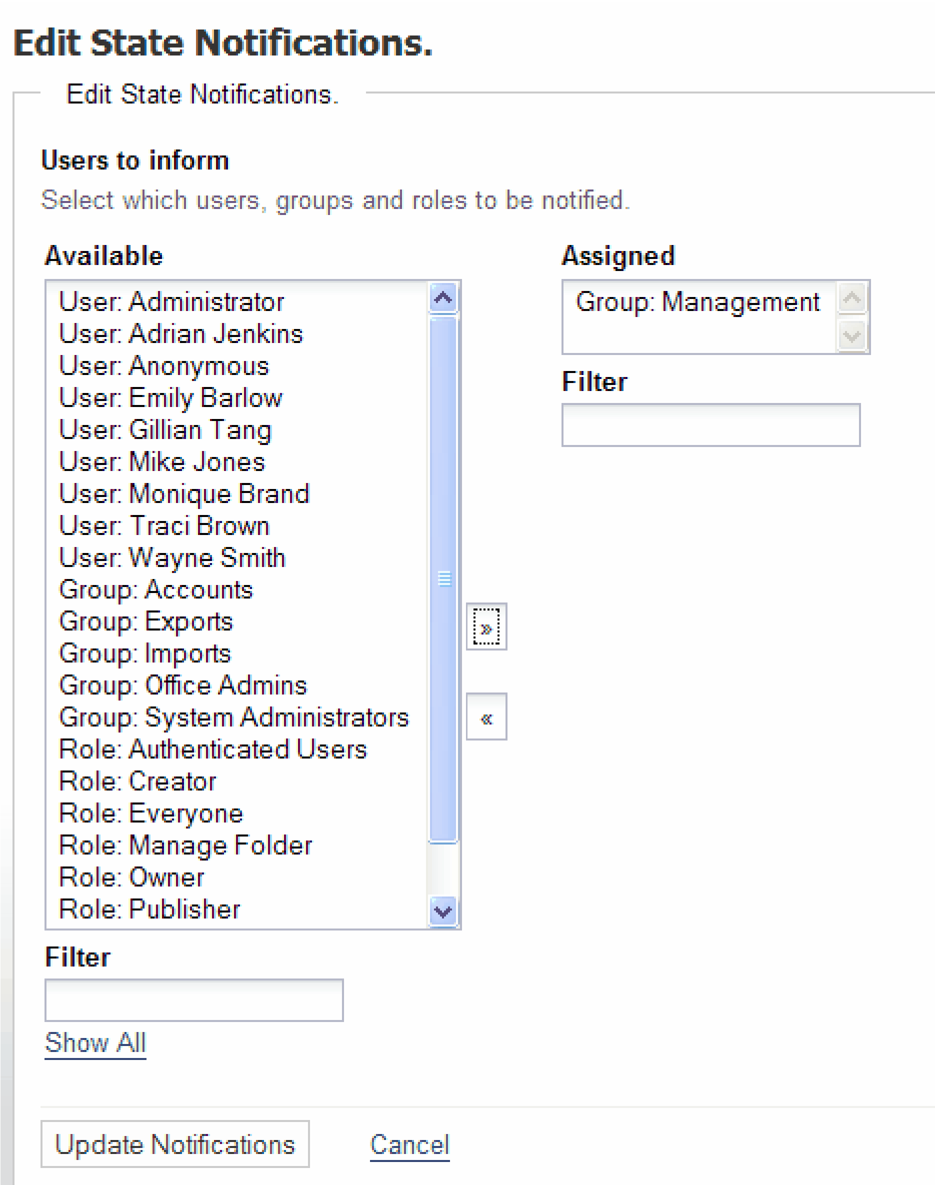
3. In the **Workflow Administration** menu, click ***States and Transitions*** to open the **States and Transitions: [workflow name]** page.

4. In the **States** section, locate the state you're configuring; then, click the ***Edit*** icon for this state to open the **Manage State** page.

5. On the **Manage State** page, in the **State Effects** section, click ***Notifications*** to open the **Edit State Notifications** page.

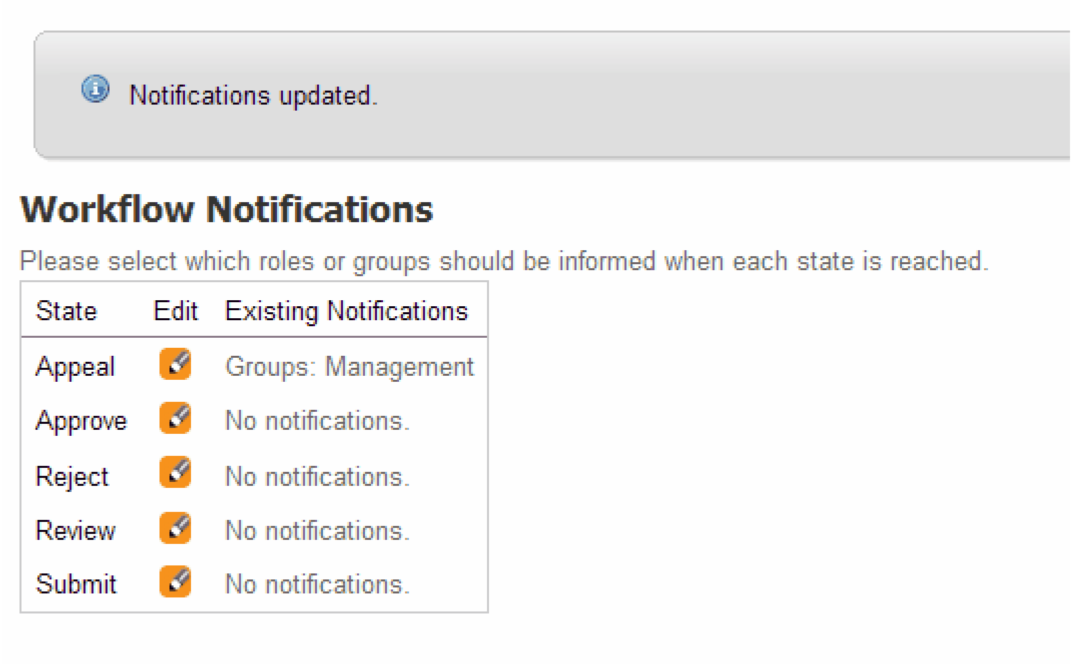


6. Populate the **Assigned** field with the names of system users that are displayed in the **Available** field, and who require notification when a document in the workflow is in this state. When you're done, click ***Update Notifications***.
   Note: *Populate the* ***Available*** *field by clicking* ***Show All*** *to display all users, or define filter criteria to sort users. Use the right-pointing and left-pointing arrows adjacent to this field to move user names from* ***Available*** *to* ***Assigned****, or from* ***Assigned*** *to* ***Available****.*



Update notifications by state

7. Your changes are saved, and the **Workflow Notifications** page displays, where you can view notifications set up per state in the workflow.



View notifications by state

8. To add or edit notifications on any state, click the ***Edit*** icon for the relevant state to open the **Edit State Notifications** page. Repeat this procedure from step 6.

3.4.16.4.4 Adding Transition Restrictions

This procedure adds a transition restriction to a selected transition.

⊟ What are Transition Restrictions (Guard Triggers)?
Transition restrictions (also called Guard Triggers) are conditions that must be met before a workflow can 'transition' to the next state in the workflow.

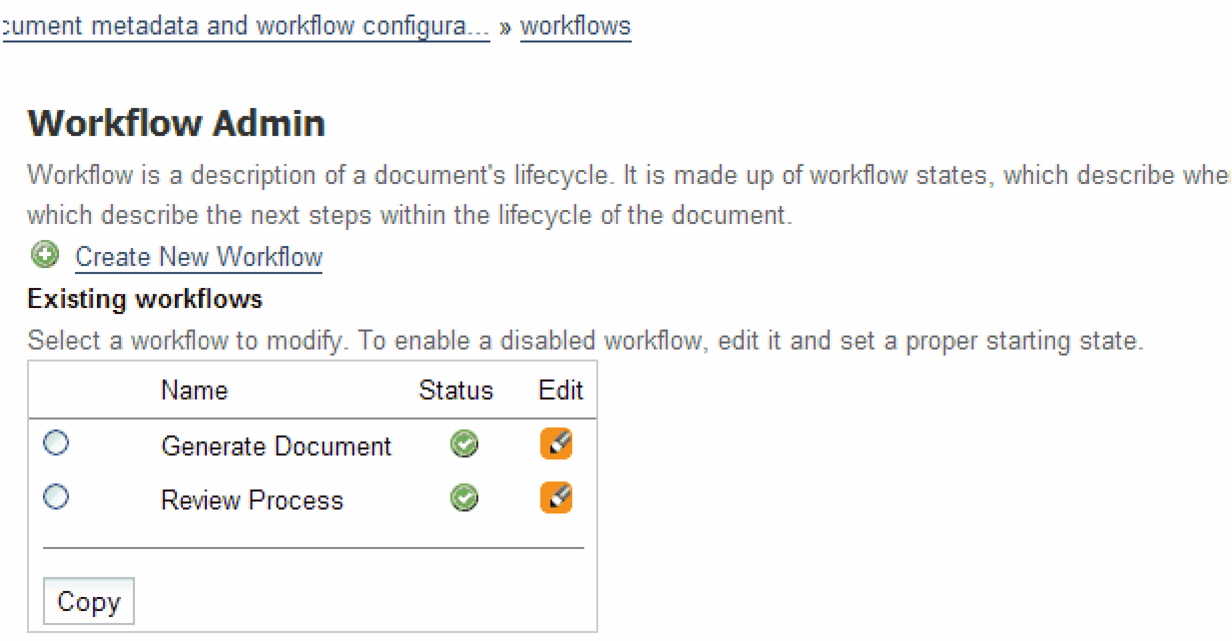
A 'Guard Trigger' may include required permissions, or only certain roles or groups that are allowed to perform the transition, or some action that occurs at the transition, such as preventing the document from being checked out at a certain state.

KnowledgeTree provides the following guard triggers for configuring Transitions in a workflow:

- Permission restrictions
- Role restrictions
- Group restrictions
- Conditional restrictions
- Checkout Guard

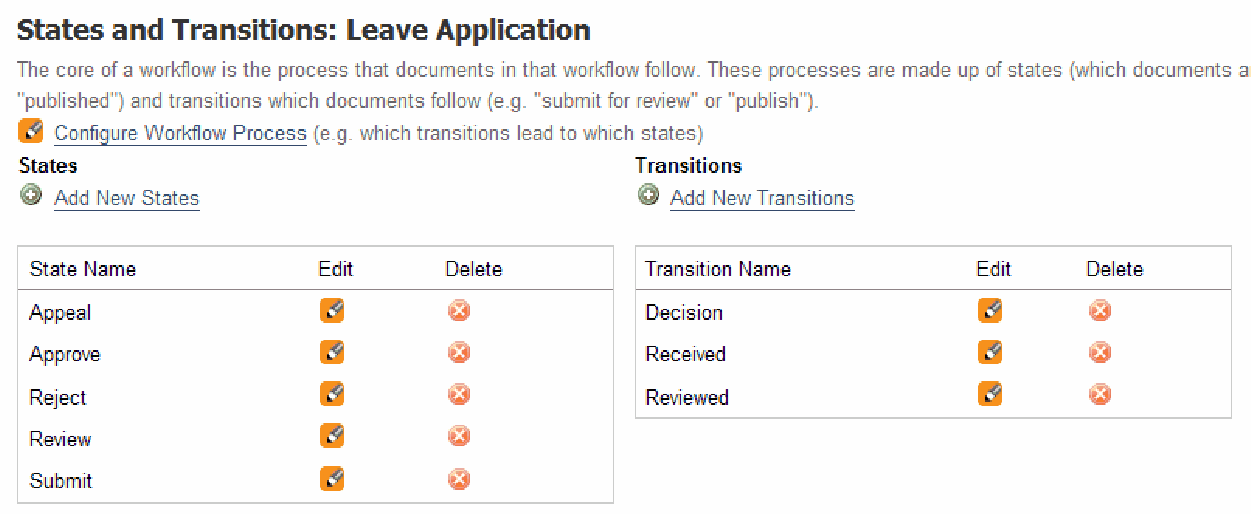
Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration - Document Metadata and Workflow Configuration - Workflows** to open the **Workflows** main page.

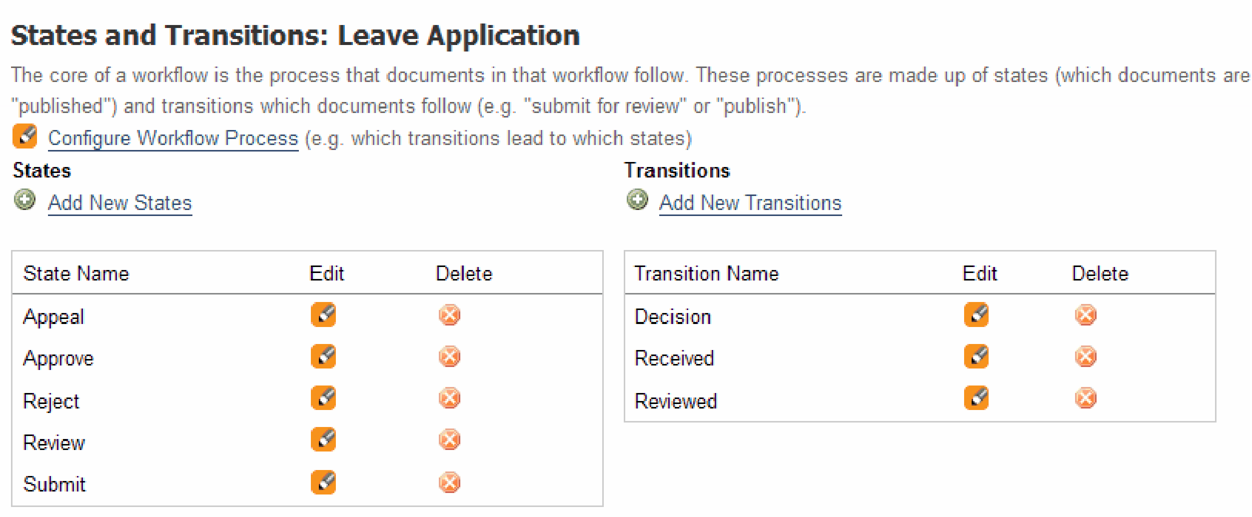


2. In the **Existing workflows** section, locate the workflow where you need to add transition restrictions; then, click the ***Edit*** icon for this workflow to open the **Workflow: [workflow name]** page.

3. In the **Workflow Administration** menu, click ***States and Transitions*** to open the **States and Transitions: [workflow name]** page.

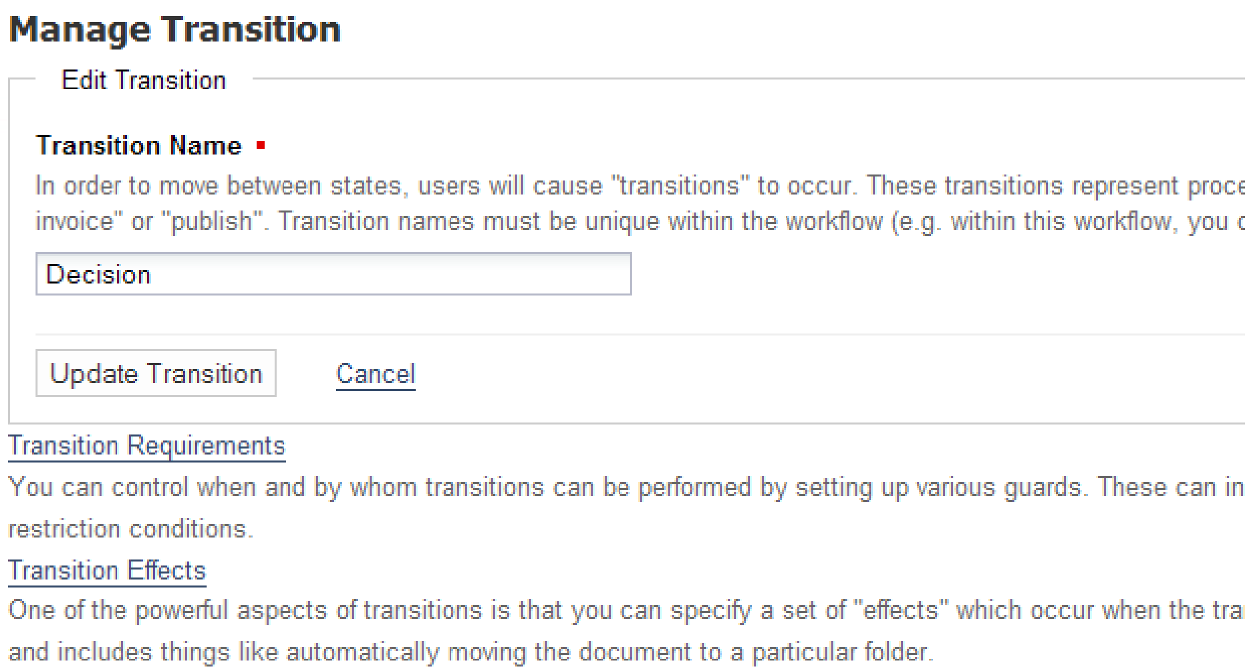


4. In the **Transitions** section, locate the transition you're configuring; then, click the ***Edit*** icon for this transition to open the **Manage Transition** page.



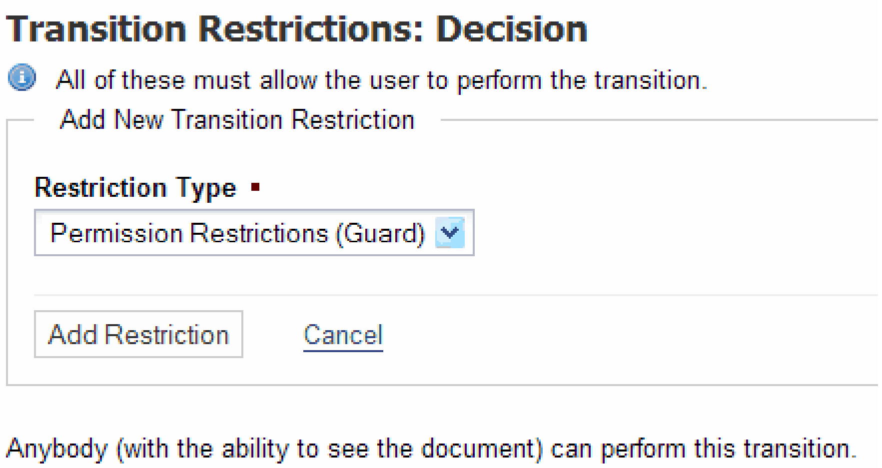
Edit Transition

5. Click ***Transition Requirements*** to open the **Transition Restrictions: [transition name]** page.

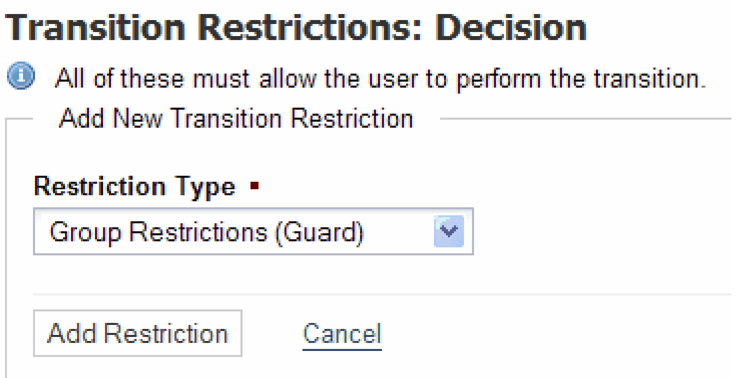


Transition Requirements

6. Click the down arrow at the **Restriction Type** drop down menu; then, select a restriction.

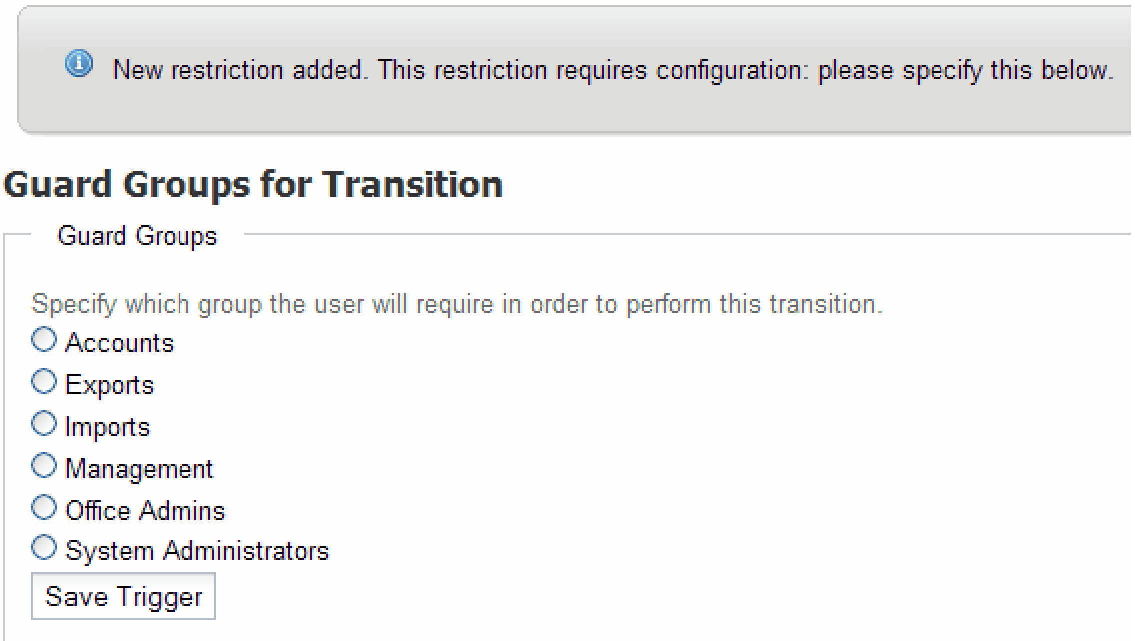


Select restriction



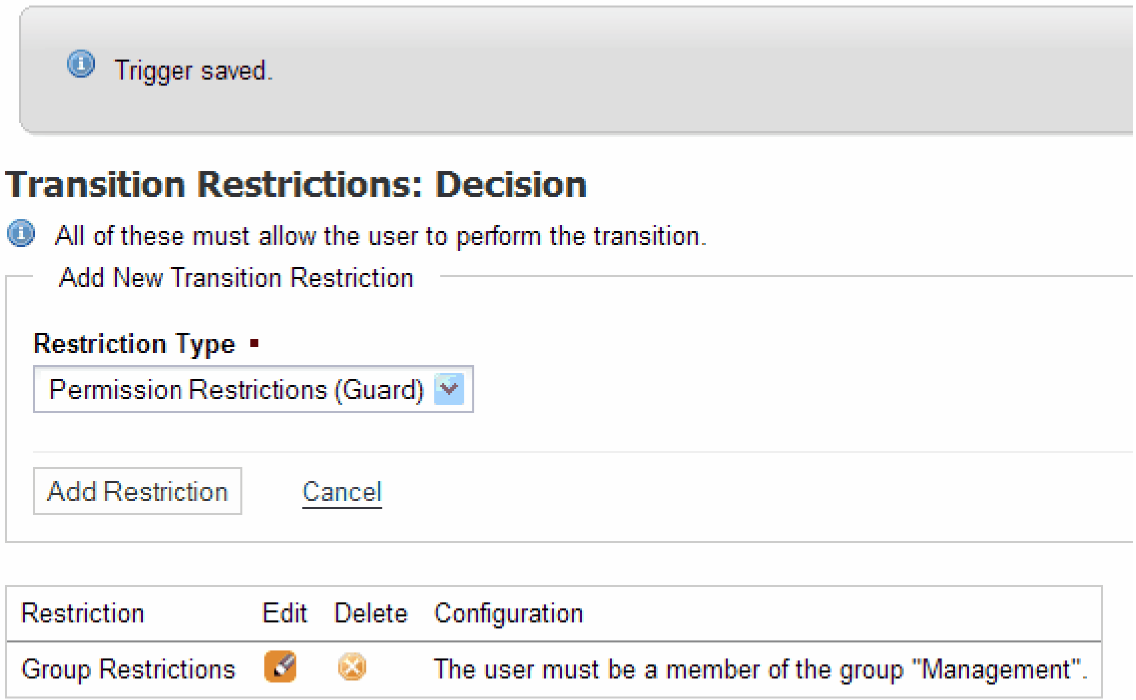
Transition restriction selected

7. Click ***Add Restriction***. The system opens the **Guard [restriction type] for Transition** page.



Configure transition restriction

8. **Is this a ...**
   - **permission restriction?** Select permissions check boxes - one or more. Only users who have *all* of these permissions will be allowed to perform the transition.
   - **role restriction?** Click a **role** radio button. Only users who have this role will be allowed to perform this transition.
   - **group restriction?** Click a **group** radio button. Only users belonging to this group will be allowed to perform this transition.
   - **conditional restriction?** Select a dynamic permission radio button. The transition is only available once this condition is met.
   - **checkout guard?** This restriction does not require additional configuration. Exit this procedure.
9. Click ***Save Trigger***. The **Transition Restrictions: [transition name]** page opens, where you can view the restriction and its configuration.



Transition restriction saved

3.4.16.4.5 Configuring Transition Effects

This procedure displays, edits, deletes, and adds transition effects (actions).

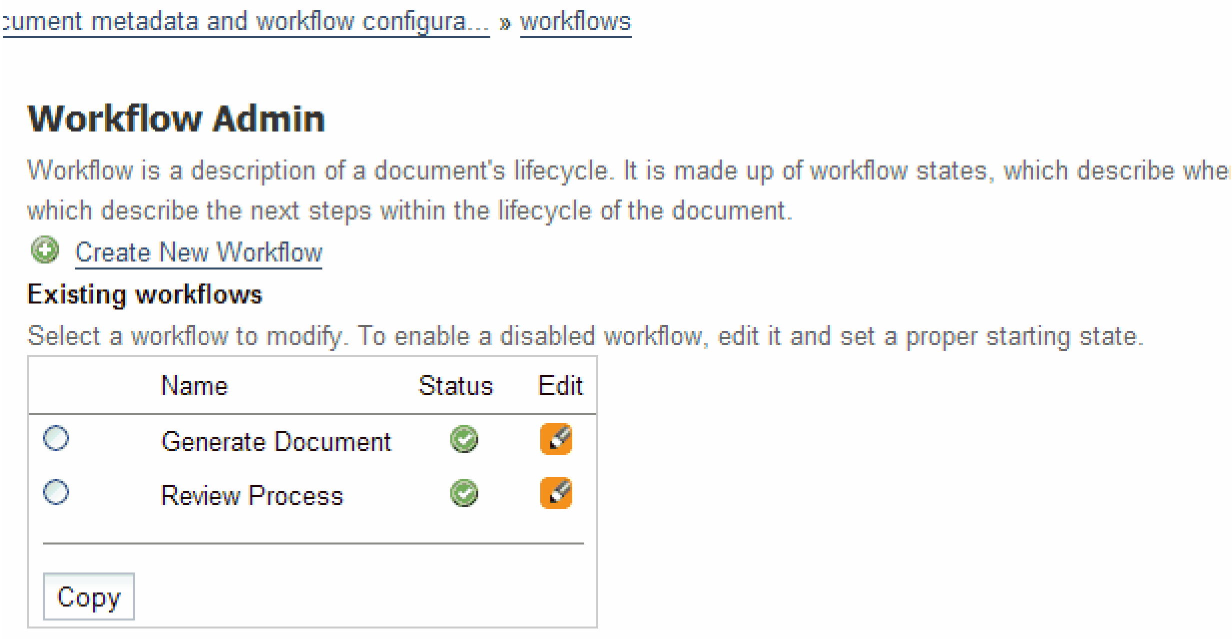
Note: *Transition effects are the actions that you want to occur on the document after it has passed through a transition in a workflow, e.g. moving the document to a specified folder.*

Configuring transition effects involves the following tasks:
- adding new transition effects

- viewing existing effects
- editing existing effects
- deleting existing effects

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration - Document Metadata and Workflow Configuration - Workflows** to open the **Workflows** main page.

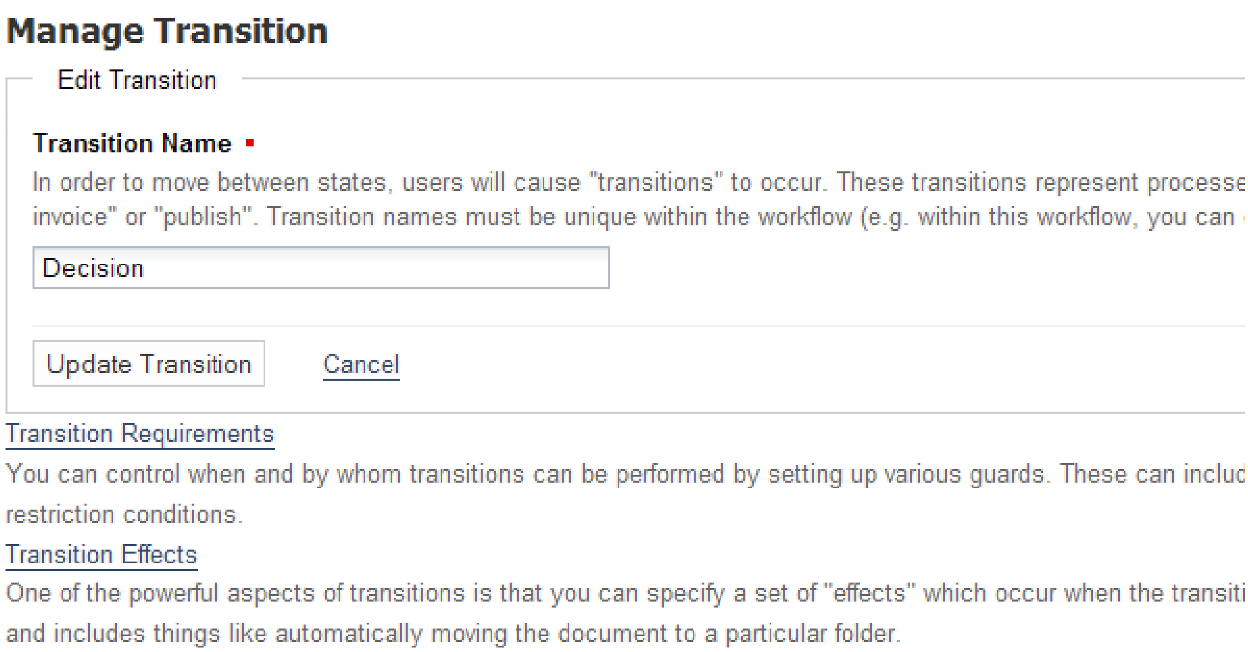


2. In the **Existing workflows** section, locate the workflow you're configuring; then, click the ***Edit*** icon for this workflow to open the **Workflow: [workflow name]** page.

3. Click **States and Transitions** in the **Workflow Administration** menu to open the **States and Transitions: [workflow name]** page.

4. In the **Transitions** section, locate the transition you're configuring; then, click the ***Edit*** icon for this transition to open the **Manage Transition** page.

5. Click ***Transition Effects*** to open the **Transition Effects** page.

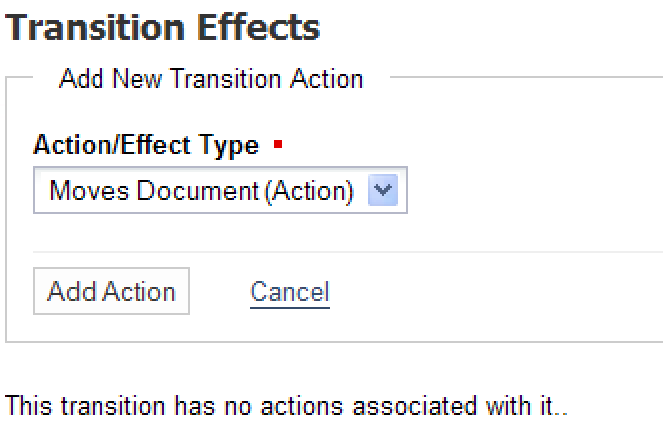


Click transition effects

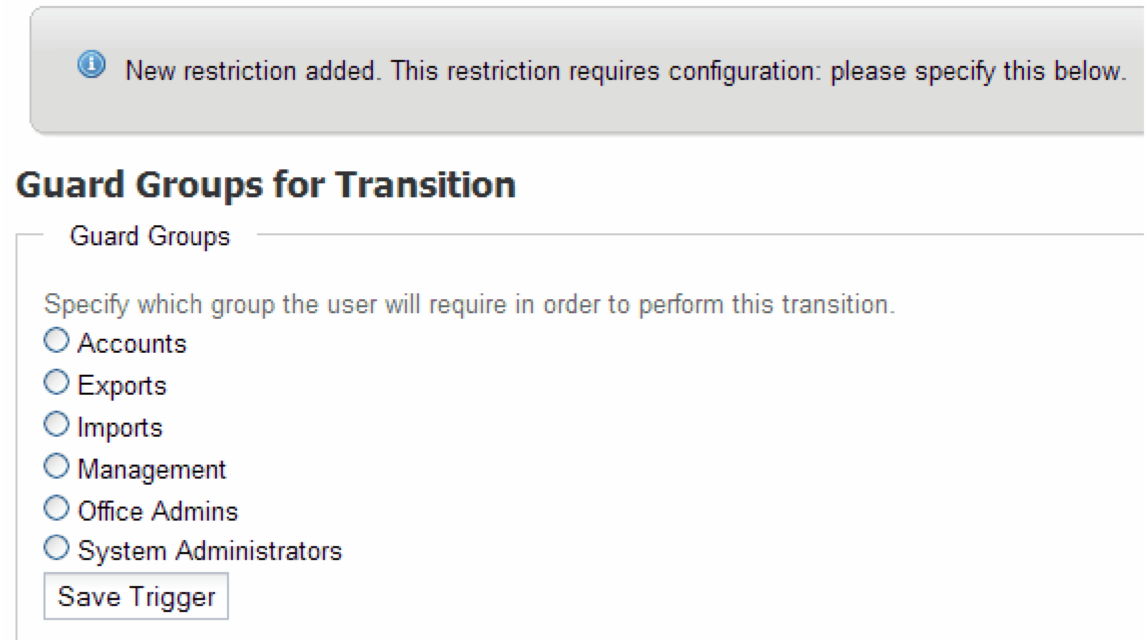
6. **Do you want to ...**
   - **view the actions/effects that exist for this transition?** A table on this page lists actions/effects that are currently set up on this transition, including configuration information for each action/effect.
   - **modify an action/effect?** View existing actions/effects in the table; then, select the **Edit** icon for the relevant action/effect to open the **[action/effect name] for Transition** page; change the configuration options on the page as required; then, select **Save Trigger**.
   - **remove an action/effect?** Click the **Delete** icon for the relevant action/effect.
   - **add a transition effect?** Go to step 7.

7. Add a transition effect:

7.1. Click the down arrow at the **Action/Effects Type** drop down menu; then, select an action/effect.

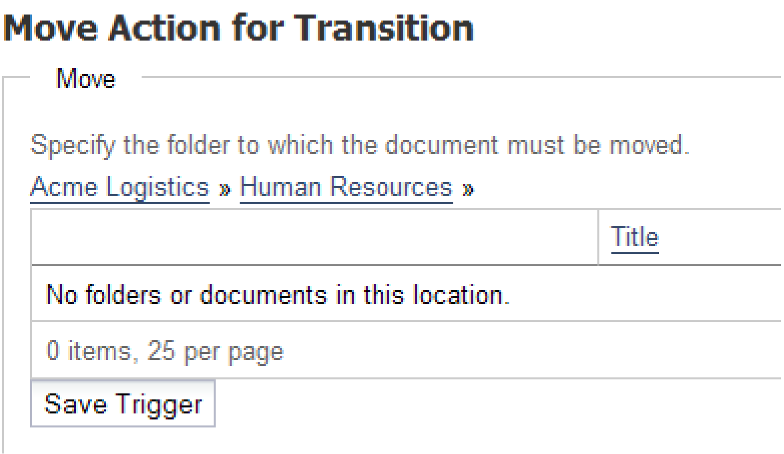


7.2.Click **Add Action** to open the **[action name] for Transition** page.



Configure transition effects

7.3.Select configuration options for the action/effect; then, click ***Save Trigger*** to re-open the **Transition Effects** page, where you can view the transition action/effect you added, and its configuration.



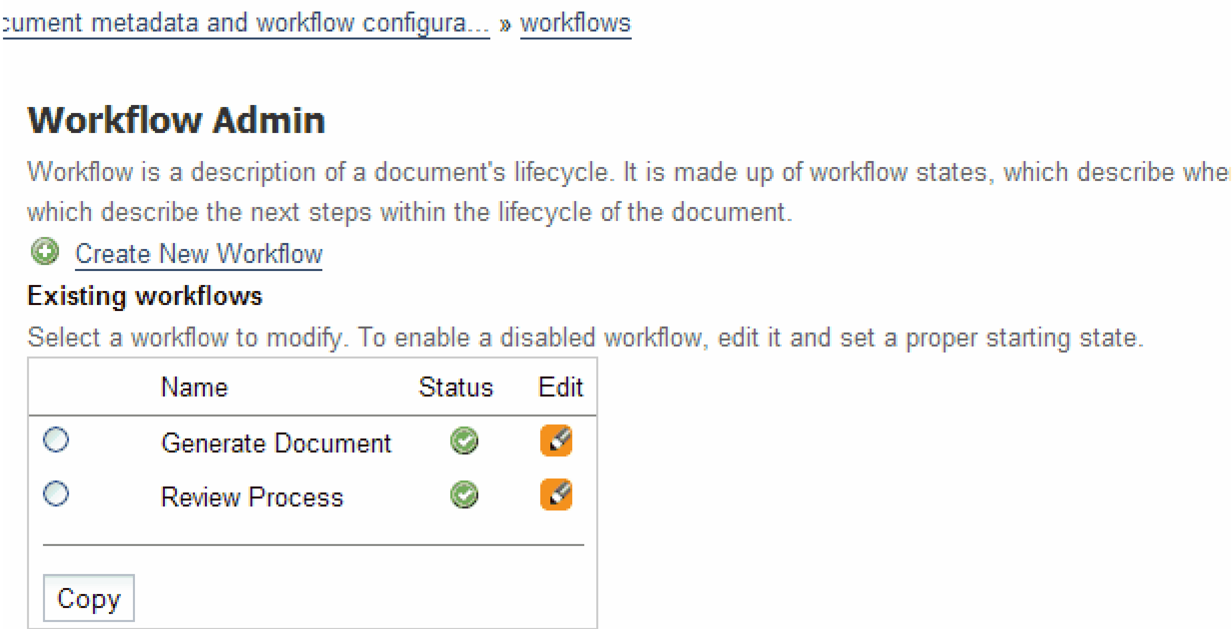
3.4.16.4.6 Viewing / Editing Workflow Settings

This procedure displays existing workflows and edits the following workflow settings:

- change the name of the workflow
- select a starting state
- enable or disable the workflow

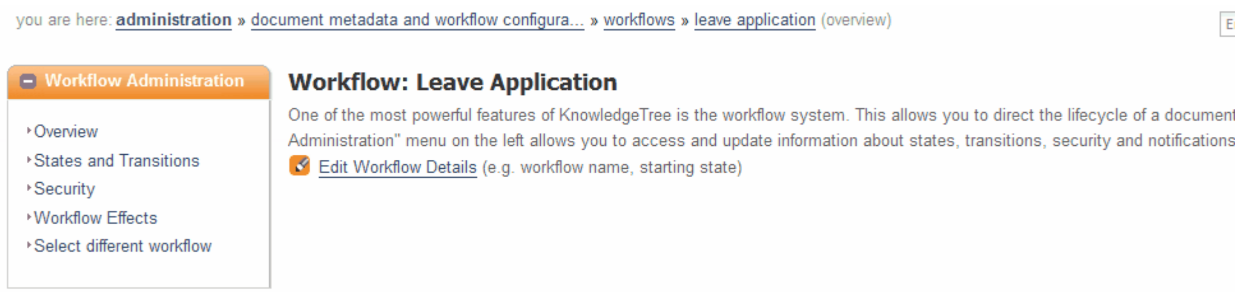
Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration - Document Metadata and Workflow Configuration - Workflows** to open the **Workflow Admin** page.

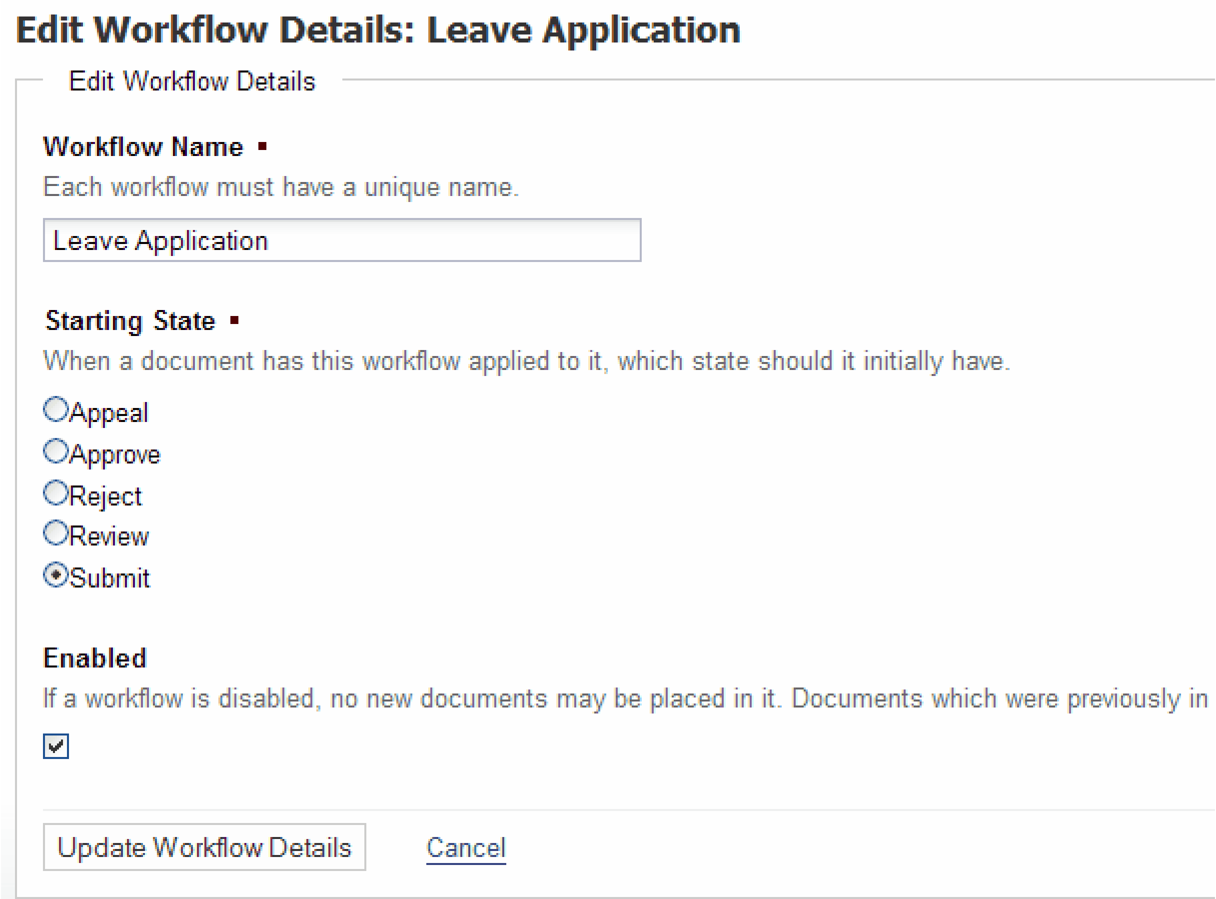


2. View existing workflows in the **Existing Workflows** section on this page.

3. To edit a workflow, click the **Edit** icon for the relevant workflow to open the **Workflow Overview**.



4. Click ***Edit Workflow Details*** to open the **Edit Workflow Details: [workflow name]** page.



5. The following workflow settings are editable:
   - change the name of the workflow in the **Workflow Name** field
   - select a starting state
   - enable or disable the workflow

6. To save your changes, click ***Update Workflow Details***.

3.4.16.4.7 Copying a Workflow

This procedure copies the settings of an existing workflow to a new workflow.

Perform the following steps:

1. Use your administrator login credentials to open the **Document Metadata and Workflow Configuration** section in **DMS Administration**.

2. Click **Workflows** to open the **Workflow Admin** page.

3. Select a workflow radio button in the **Existing Workflows** section; then, click ***Copy*.**

4. On the **Copy Workflow** page, define a name for the new workflow; then, click ***Copy***.

5. The new workflow displays in the **Existing workflows** section.

3.4.16.4.8 Editing Connections from Transitions to States

This procedure edits existing connections between Transitions and States in a currently selected workflow.

Perform the following steps:

1. Open the **Document Metadata and Workflow Configuration** section in **DMS Administration**; then, click **Workflows** to open the **Workflows** main page.

2. Locate the relevant workflow in the **Existing workflows** section; then, click its ***Edit*** icon to open the **Workflow: [workflow name]** page.

3. Click **States and Transitions** in the **Workflow Administration** menu to open the **States and Transitions: [workflow name]** page.

4. Click **Configure Workflow Process** to open the workflow configuration page.

5. Locate the relevant transition in the **Transition** column; then, select a destination state for the transition in the adjacent **Leads to state** pick list.

6. Select source **State** check boxes - one or more - to define the state/s that precedes this transition.
   Note: *KnowledgeTree allows a document in a workflow to move to the next state from one or more source states.*

7. Click **Update Process** to re-open the **States and Transitions:[workflow name]** page.

3.4.16.4.9 Adding / Editing Transitions

This procedure edits existing transitions and adds new workflow transitions.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go

to **DMS Administration - Document Metadata and Workflow Configuration - Workflows** to open the **Workflows** main page.

2. Scroll down to view existing workflows; then, click the **Edit** icon for the workflow you're configuring.

3. Click ***States and Transitions*** in the **Workflow Administration** menu to open the **States and Transitions: [workflow name]** page.

4. **Do you want to ...**

   - **add a new transition?** Go to step 5.

   - **edit an existing transition?** Go to step 6.

5. Add a transition:
   5.1. Click **Add New Transitions** to open the **Add Transitions to Workflow** page.

   5.2. Define new transitions for this workflow - one per line - in the text field; then, click ***Add Transitions***.
   Note: *You must use unique names for new transitions.*

   5.3. The **States and Transitions: [workflow name]** page opens. Now you can connect the transition to a destination state (the next state after this transition), and to one or more source states (the states that lead to this transition). Go to Configuring Workflow Process for more information about this task.

6. Edit a transition:

   6.1. Locate the transition you're configuring (in the **Transitions** section of the **States and Transitions: [workflow name]** page; then, click the ***Edit*** icon for this transition to open the **Manage Transition** page.

   6.2. **Do you want to ...**
   - **change the name of the transition?** Define a new name for the transition in the **Transition Name** field; then, click ***Update Transition***.

   - **configure transition restrictions (guards)?** Go to Configuring Transition Restrictions.
     Note: *Transition restrictions are a restrictive setting that defines when the transition can be performed, and by whom.*

   - **configure transition effects?** Go to Configuring Transition Effects.

3.4.16.4.10 Viewing / Editing / Deleting Transition Restrictions

This procedure displays, edits, and deletes restrictions on a currently selected transition.

Perform the following steps:

1. Open the **Document Metadata and Workflow Configuration** section in **DMS Administration**; then, click ***Workflows*** to open the **Workflows** main page.

2. In the **Existing workflows** section, locate the workflow you're configuring; then, click the **Edit** icon for this workflow to open the **Workflow: [workflow name]** page.

3. Click ***States and Transitions*** in the **Workflow Administration** menu to open the **States and Transitions: [workflow name]** page.

4. In the **Transitions** section, locate the transition you're configuring; then, click the ***Edit*** icon for this transition to open the **Manage Transition** page.

5. Click **Transition Requirements** to open the **Transition Restrictions: [transition name]** page.

6. **Do you want to ...**
   - **view all restrictions (guards) that are currently configured for this transition?** A table on this page provides a list of restrictions that are set up for this transition, including the configuration for each restriction.

   - **modify an editable restriction?** Click the **Edit** icon for the relevant restriction to open the editing screen for the restriction. Make the required changes; then, click ***Save Trigger***.
     Note: *Only transition restrictions that display the Edit icon are editable.*

   - **delete a transition restriction?** Click the **Delete** icon for the relevant restriction.

   - **add a new restriction?** Go to Adding Transition Restrictions.

3.4.16.4.11 Adding / Editing States

This procedure edits existing states and adds new states in a currently selected, existing workflow.

Note: *The following information is editable: state name, and state effects (security and notifications).*

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's Web interface; then, go to **DMS Administration - Document Metadata and Workflow Configuration - Workflows** to open the **Workflows** admin page.

2. In the **Existing workflows** section, locate the workflow you're configuring; then, click the ***Edit*** icon for this workflow to open the **Workflow: [workflow name]** page.

3. Click ***States and Transitions*** in the **Workflow Administration** menu to open the **States and Transitions: [workflow name]** page.

4. **Do you want to ...**
   - **add a new state?** Go to step 5

   - **edit a state?** Go to step 6.

5. Add a state:

5.1. Click ***Add New States*** to open the **Add States to Workflow** page.

5.2. Define new states for this workflow - one per line - in the text field; then, click ***Add***

States.

Note: *New states added to the workflow must be given a unique name.*

5.3. The **States and Transitions: [workflow name]** page opens, where you can view, edit, or delete existing states.

6. Edit a state:

6.1. In the **States** section, locate the state you're configuring; then, click the ***Edit*** icon for this state to open the **Manage State** page.

6.2. **Do you want to ...**

- **change the name of this state?** Define a new name for the state in the **State Name** field.

- **configure security settings for this state?** Go to Configuring security by workflow state.
  Note: *KnowledgeTree's workflow tool allows the admin user to control permissions and block specified document actions through the Workflow State.*

- **configure notifications for this state?** Go to Configuring Workflow State Notifications.

  Note: *The administrative user configures the system to send notifications to specified users when a document reaches a certain state in the workflow.*

3.4.16.4.12 Enabling / Disabling Automatic Assignment of Workflows

This procedure enables and disables automatic workflow assignment.

Note: *Enabling Automatic Workflow Assignment allows you to configure workflows to be assigned automatically to documents, based on their document type, or on their folder location.*

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **DMS Administration - Document Metadata and Workflow Configuration** - **Automatic Workflow Assignments** to open

2. On the **Automatic Workflow Selection** page, click the **Workflow Plugins** down-arrow to expand the pick list; then, select a workflow assignment mode for KnowledgeTree. Options are:

   - **DocumentTypeWorkflowAssociator** - allows you to assign workflows by document type. Once you have enabled this feature, you may allocate the workflows to use for each document type. See Allocating Workflows to Document Types.

   - **FolderWorkflowAssociator -** allows you to assign workflow by folder

   - **No automatic assignment -** disables automatic workflow assignment

3. Click ***Update***.

3.4.16.4.13 Allocating Workflows to Document Types

This procedure allocates a selected workflow to a specified document type so that, when users upload a document and select the document type, the workflow is automatically activated on the document.

Pre-requisites:
- Enable the automatic workflow assignment function

Perform the following steps:
1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **DMS Administration** - **Document Metadata and Workflow Configuration - Workflow Allocation by Document Types**.

2. On the **Workflow Allocation by Document Type** page, scroll down to **Workflow Allocations** to view the list of existing document types.

3. Choose the relevant document type (i.e. the document type where you want to allocate a workflow); then, expand the adjacent **Workflow** pick list to select the workflow that should be automatically assigned on this document type.

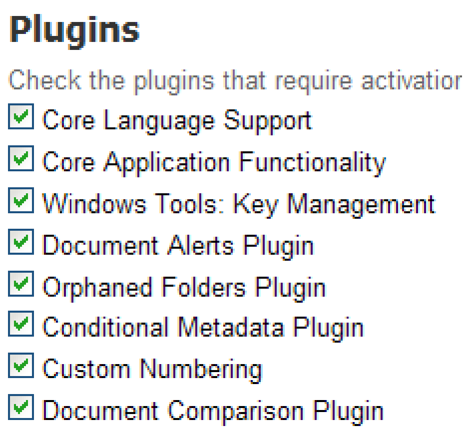
4. Click ***Apply***.
   Note: *Repeat this procedure for each document type requiring automatic workflow allocation.*

3.4.16.5 Configuring Custom Document Numbering Schemes

KnowledgeTree's **custom document numbering schemes** feature allows you to create a unique document numbering scheme for each document type in your KnowledgeTree installation.

Custom numbering schemes provide flexibility around the format and content of KnowledgeTree Document IDs.

Commercial Editions Only
Note: *This feature is available only in KnowledgeTree Commercial Editions. You must enable the* ***Custom Numbering*** *plugin to use this functionality.*



Custom Numbering Plugin

How are custom numbering schemes used?

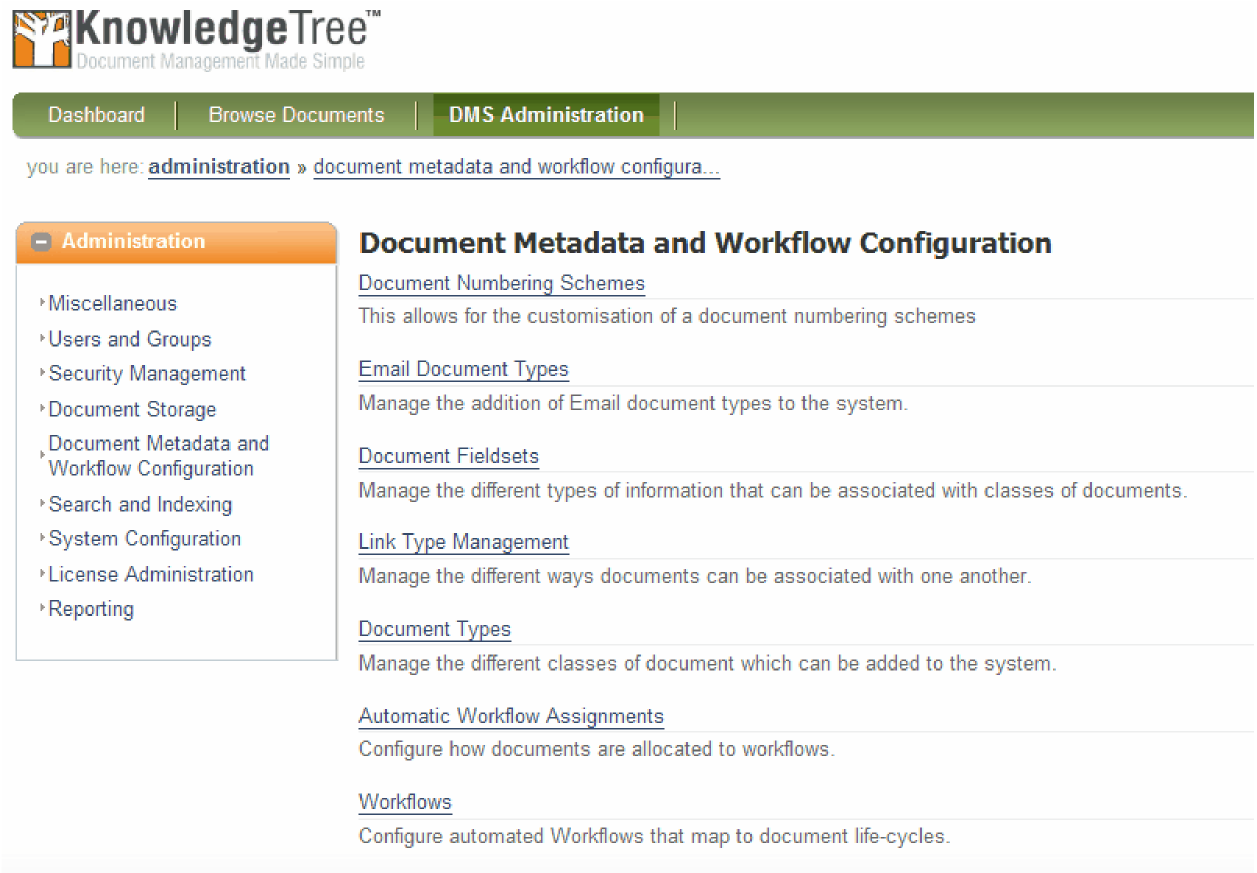
1. When uploading documents to KnowledgeTree, users select a document type.

2. If a custom numbering scheme has been defined for the document type, KnowledgeTree generates the document ID according to the custom numbering scheme.

3. When no custom numbering scheme exists for the selected document type, KnowledgeTree generates the document ID according to the default document numbering scheme.

The Custom Numbering Management Interface

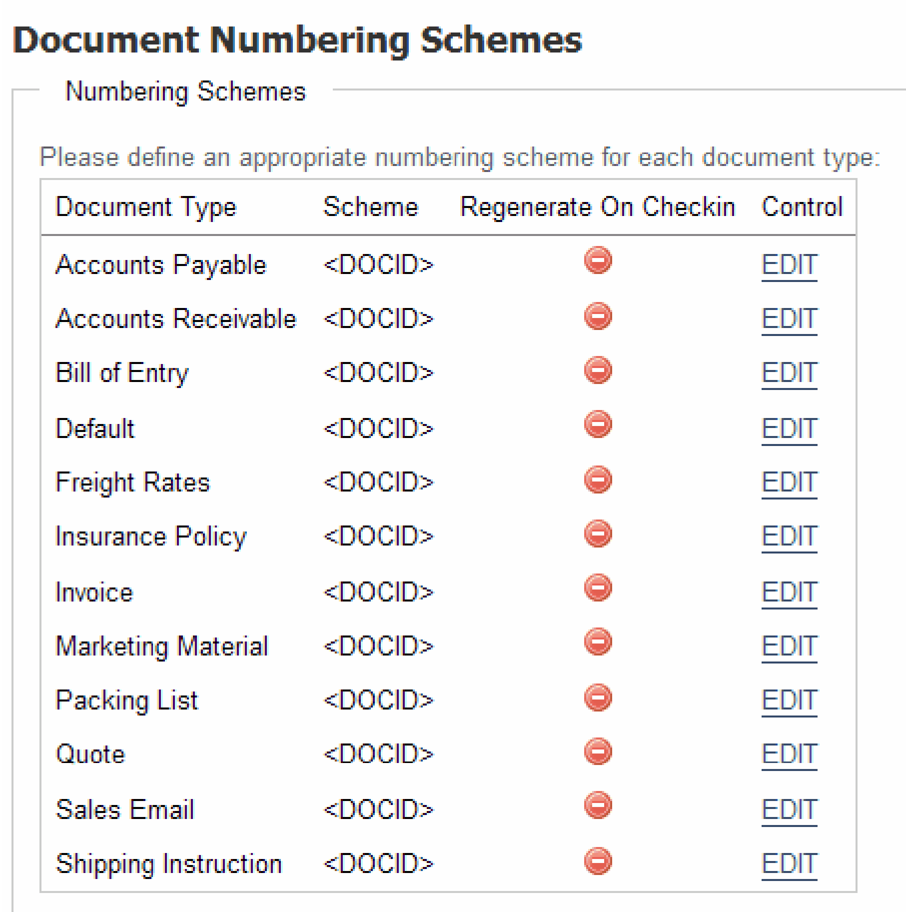
Custom numbering schemes are added, edited, and viewed through KnowledgeTree's web interface, in **DMS Administration - Document Metadata and Workflow Configuration - Document Numbering Schemes**.



Accessing the Document Numbering Interface

On the Document Numbering Scheme interface, you may:

- view existing numbering schemes, per document type
- edit existing numbering schemes - click *Edit* to make the field editable
- create and save new numbering schemes



Document Numbering Schemes

Numbering Schemes

Please define an appropriate numbering scheme for each document type:

Document Type	Scheme	Regenerate On Checkin	Control
Accounts Payable	<DOCID>		EDIT
Accounts Receivable	<DOCID>		EDIT
Bill of Entry	<DOCID>		EDIT
Default	<DOCID>		EDIT
Freight Rates	<DOCID>		EDIT
Insurance Policy	<DOCID>		EDIT
Invoice	<DOCID>		EDIT
Marketing Material	<DOCID>		EDIT
Packing List	<DOCID>		EDIT
Quote	<DOCID>		EDIT
Sales Email	<DOCID>		EDIT
Shipping Instruction	<DOCID>		EDIT

Numbering Schemes Configuration Interface - you can configure a scheme for each document type

Adding Custom Numbering Schemes

KnowledgeTree provides a collection of Tokens (allowable variables, defined in plain text between '<' and '>') that are used in various combinations to create custom numbering schemes.

Types of Tokens:

- **Normal** tokens provide a descriptive reference for the document (format), such as a date (day, month, year), the path to the document location, version number, KnowledgeTree document ID, and the document type.

- **Sequence** tokens define how the custom document ID number increments as each new document of that document type is added to KnowledgeTree.

Example:
Note: *Tokens are case-sensitive, and are preceded by '<' and end with '>'*
<DOCTYPE>-NUM-<DOCTYPE_SEQ:3>
"Invoice-NUM-001, Invoice-NUM-002, Invoice-NUM-003"

DOCUMENT-<DD>-<MM>-<YEAR>:<YEAR_SEQ>
"DOCUMENT-31-12-2007:1, DOCUMENT-31-12-2007:2"

Adding Custom Numbering Schemes

- When defining custom numbering schemes, you may use both Tokens - delimited with '<' and '>' - and plain text strings (which are not delimited).
- KnowledgeTree validates new schemes by checking that supported tokens are used. Validation typically fails when the token is not properly delimited, i.e. when using '<'and'>' outside of the token
- For each custom scheme, you need to define whether to regenerate the document ID when documents are checked in to KnowledgeTree

Token (Normal)	**Definition**	**Example**
<YEAR>	Year (String)	2007
<MONTH>	Month (String)	June
<YY>	Year (Int)	99
<MM>	Month (Int)	08
<DD>	Day (Int)	31
<VERSION>	Document Version	0.1
<DOCTYPE>	Document Type Name	Invoice
<DOCID>	KnowledgeTree Document ID doc id and numbering scheme must not be used interchangeably	22
<PATH>	Repository document/folder path (Max 50 chars)	/INVOICE/2007/ABC/
Token (Sequence)	**Definition**	**Example**
<DOCTYPE_YEAR_SEQ:[1-9]>	Counter, on a document type basis	#
<DOCTYPE_YEAR_MONTH_SEQ:[1-9]>	Counter, on a document type basis (reset yearly)	#
<YEAR_MONTH_SEQ:[1-9]>	Counter, on a monthly basis (reset yearly)	#
<YEAR_SEQ:[1-9]>	Counter, on a yearly basis	#
<DOCTYPE_SEQ:[1-9]>	Counter, on a document type basis	#

Sequence Tokens

A **sequence token** is an element used in a custom numbering scheme to define how document numbers of a particular document type will increment when new documents of that document type are added to the repository. One sequence token is used per numbering scheme. When configuring the scheme, the admin user specifies the number of digits in a sequence. Negative digits are disallowed.

Sequence Token Format

Format	Example	results in the following sequence ..
<TOKEN:#> *or,* <TOKEN>	<DOCTYPE_SEQ:3>	'001, 002, 003…010, 011…'
	<DOCTYPE_SEQ:2>	'01, 02, 03…10, 11…'
	<DOCTYPE_SEQ>	'1, 2, 3…10, 11…'

Sequence Tokens

DOC_TYPE_SEQ

- Store one sequence for each of the document types within the repository.
- Each time a document of a certain type is added to the system the relevant document type should be incremented.

Examples:

numbering scheme	format	command
Invoice001, Invoice002, Invoice003	YEAR_SEQ	• Store a single sequence • Reset the sequence on a yearly basis. • Increment the relevant counter every time a document is added within the year.
Invoice2007-001, Invoice2007-002, Invoice2008-001	YEAR_MONTH_SEQ	• Store a single sequence • Reset the sequence at the beginning of every month • Increment the relevant counter every time a document is added within a month.
Invoice2007-January-001, Invoice2007-January-002, Invoice2007-February-001	DOCTYPE_YEAR_SEQ	• Store 1 sequence for each of the document types within the repository. • Each time a document of a certain type is added to the system, the relevant document type sequence should be incremented. • Reset the sequence on a yearly basis
Invoice2007-001, Invoice2007-002, Invoice2008-001	DOCTYPE_YEAR_MONTH_SEQ	• Store 1 sequence for each of the document types within the repository. • Each time a document of a certain type is added to the system the relevant document type sequence should be incremented. • Reset the sequence on a monthly basis

3.4.16.6 Configuring Document Links

This procedure displays, edits, and deletes existing document links, and adds new document links.

⊟ What are Document Links?
Document Links are used to define a relationship between selected documents in KnowledgeTree. When creating a document link, you specify the relationship that the link implies, e.g. 'associated with', or 'duplicated by'.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration - Document Metadata and Workflow Configuration - Link Type Management** to open the **Document Link Type Management** page.
2. **Do you want to ...**
   - **view existing link types?** Scroll down to the **Manage Existing Link Types** section at the bottom of this page to view a list of existing link types.
   - **add a new link type?** Define a name for the link type in the **Name** field. Provide a brief description of the link in the **Description** field. Click ***Add Link Type***.
   - **edit an existing link type?** Click the ***Edit*** icon for the relevant link type to open the link type editing screen. Make the required changes (change the name or description); then, click ***Change Link Type***.
   - **delete an existing link type?** Locate the link type in the **Manage Existing Link Types** section at the bottom of the page; then, click the **Delete** icon for the relevant link.

3.4.17 Search and Indexing

KnowledgeTree's 3.5.x search engine uses Apache Lucene full text indexing for document indexing.
Note: *Previous versions of KnowledgeTree use MySQL full text indexing.*

KnowledgeTree's indexing mechanism includes:
- a search query builder
- results ranked by relevance and including a snippet of document content where the 'hit has occurred
- offline document indexing (improves performance)

⊟ Search Results Ranking
The 'search_ranking' table in the database displays the weightings associated with matching sub-expressions. You can modify these weightings directly on the database to improve the relevance of search results.

⊟ The KnowledgeTree Scheduler
The KnowledgeTree Scheduler runs and manages background tasks and batch jobs. Tasks are configurable through KnowledgeTree's web interface, in **DMS Administration - Miscellaneous -** Manage Task Scheduler.

The Scheduler - called from a cron on *nix systems, and via the Task Scheduler on Windows - iterates through a list of tasks, and runs any due tasks. Tasks may be set to run at given intervals - e.g. every 5 minutes, hourly, daily, etc. The frequency at which the Scheduler performs tasks may be set in DMS Administration - System Configuration. The default is every one minute.

Scheduled Indexing
The Indexing script should be scheduled to run approximately every 5 minutes. The number of documents to be indexed can be configured through KnowledgeTree's config.ini file (configuration field: indexer/batchDocuments), where the default is 20 documents.

When increasing or decreasing the indexing frequency you need to increase of decrease the number of documents that will be indexed in a batch relevant to how the indexing frequency is reduced or increased. For example, when allowing the Indexer to run every 5 minutes, more documents may be processed in a batch compared to when the Indexer runs every minute.

Search Optimization
Search optimization is performed through a scheduled task. For best performance, the Indexer should be regularly optimized - typically, once a day around midnight, or weekly, depending on the frequency of updates to the index.

Note: *Complex search expressions may cause performance issues, typically when the expression evaluator has to determine which sub-expressions should run on the database and which sub-expressions should run on the Document Indexer. In this case, the expression evaluator search engine attempts to evaluate all the sub-expressions that are possible on each system without breaking the meaning of the expression. Ideally each system should be queried as little as possible per query.*

To improve performance ...
- group database fields closer to one another
- group the full text fields closer to one another
- minimize complex expressions

Example:
The following expression ...
(DocumentText contains "hello World") and (Filesize <= "100") and (DiscussionText contains "world") and (title contains "hello")

... is best rephrased as:

(DocumentText contains "hello World" and DiscussionText contains "world") and (Title contains "hello" and Filesize <= "100")

3.4.17.1 Configuring Search and Indexing

This procedure configures KnowledgeTree's search and indexing settings.

Perform the following steps:
1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration - Search and Indexing**.

2. **What do you want to do?**

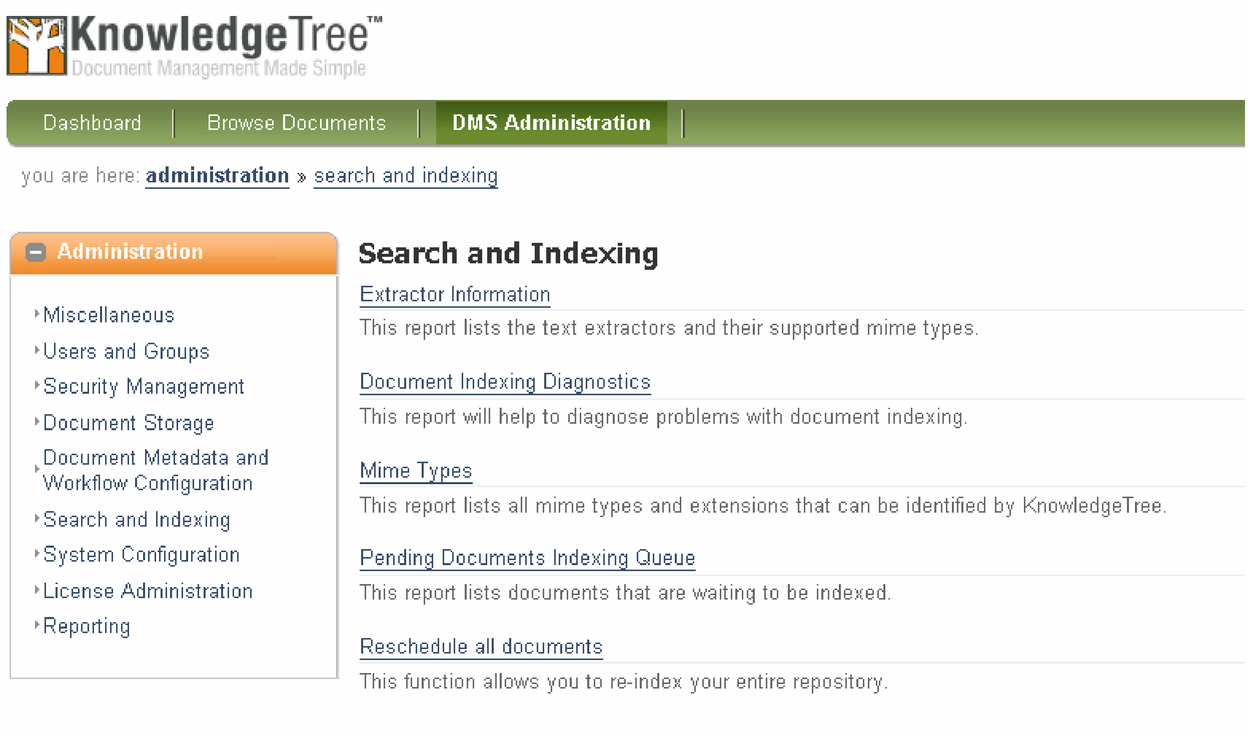
- **View supported mime types and their extensions.** Click ***Mime Types***.

- **View a list of text extractors and their supported mime types and extensions.** Click ***Extractor Information***.

- **View documents that have caused indexing problems, and reschedule indexing on selected documents?** Click ***Document Indexing Diagnostics.*** View the report, which provides the following information about the problematic documents: a link to the document in the DMS, the document ID, the document mime type and extractor. You may select documents for which you want to reschedule indexing.

- **View a list of documents waiting to be indexed.** Click ***Pending Documents Indexing Queue***.

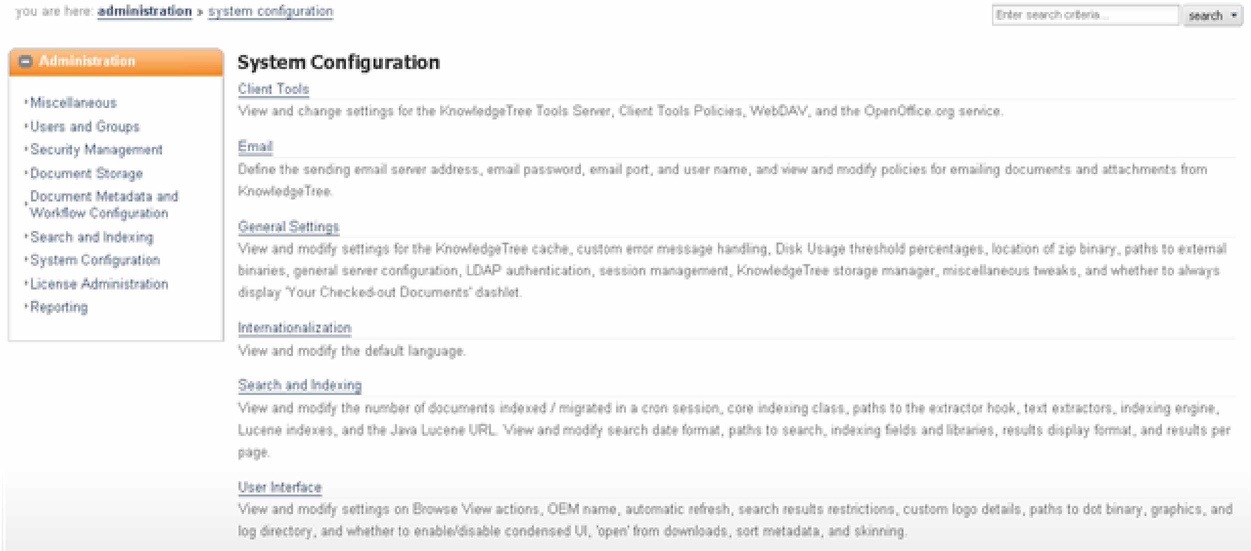
- Re-index your entire repository. Click ***Reschedule all documents***.



Search and Indexing Page

3.4.18 System Configuration

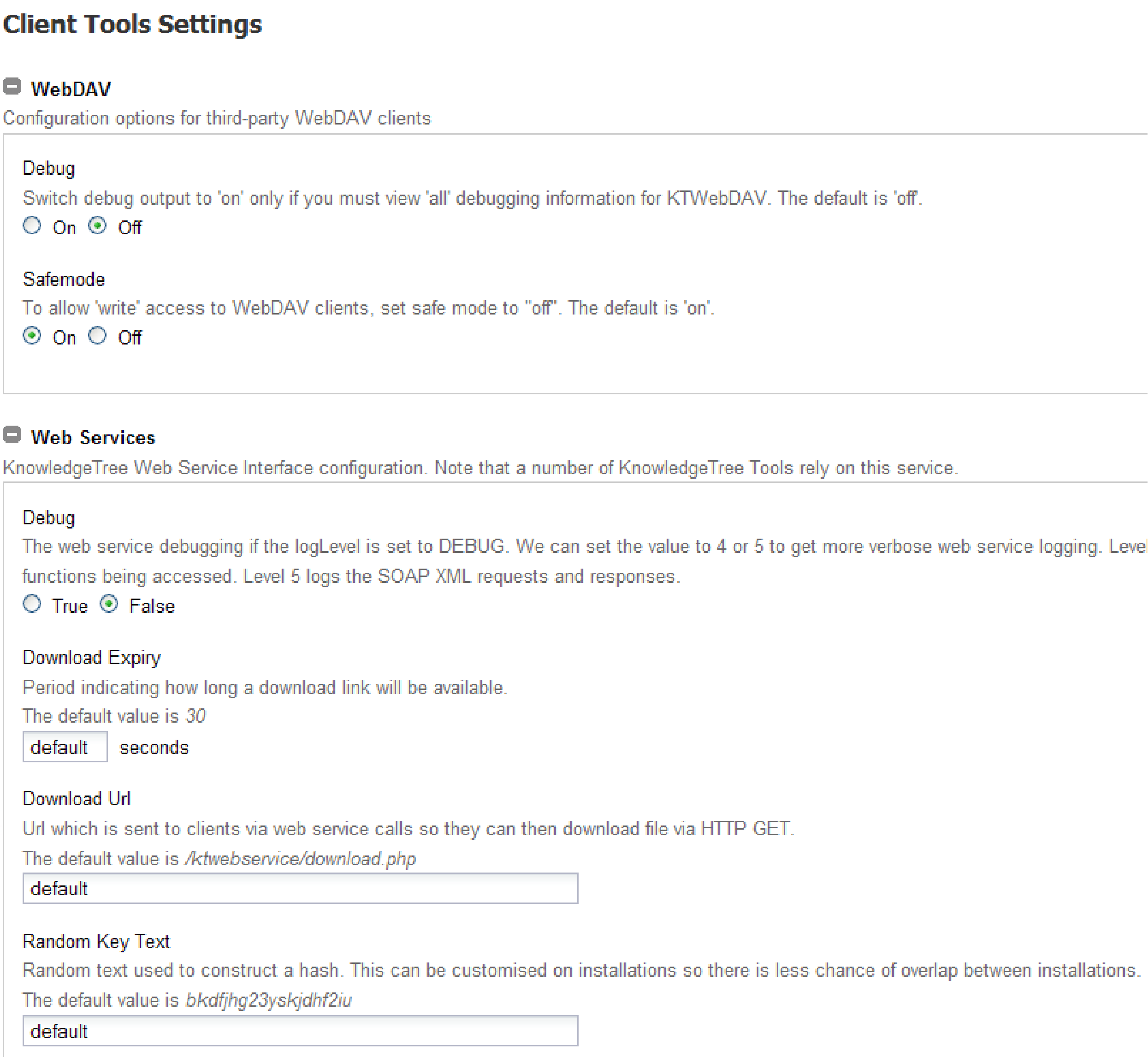
This topic provides information on tasks that may be performed in KnowledgeTree's Web interface system configuration interface: **DMS Administration - System Configuration**:



System Configuration Interface

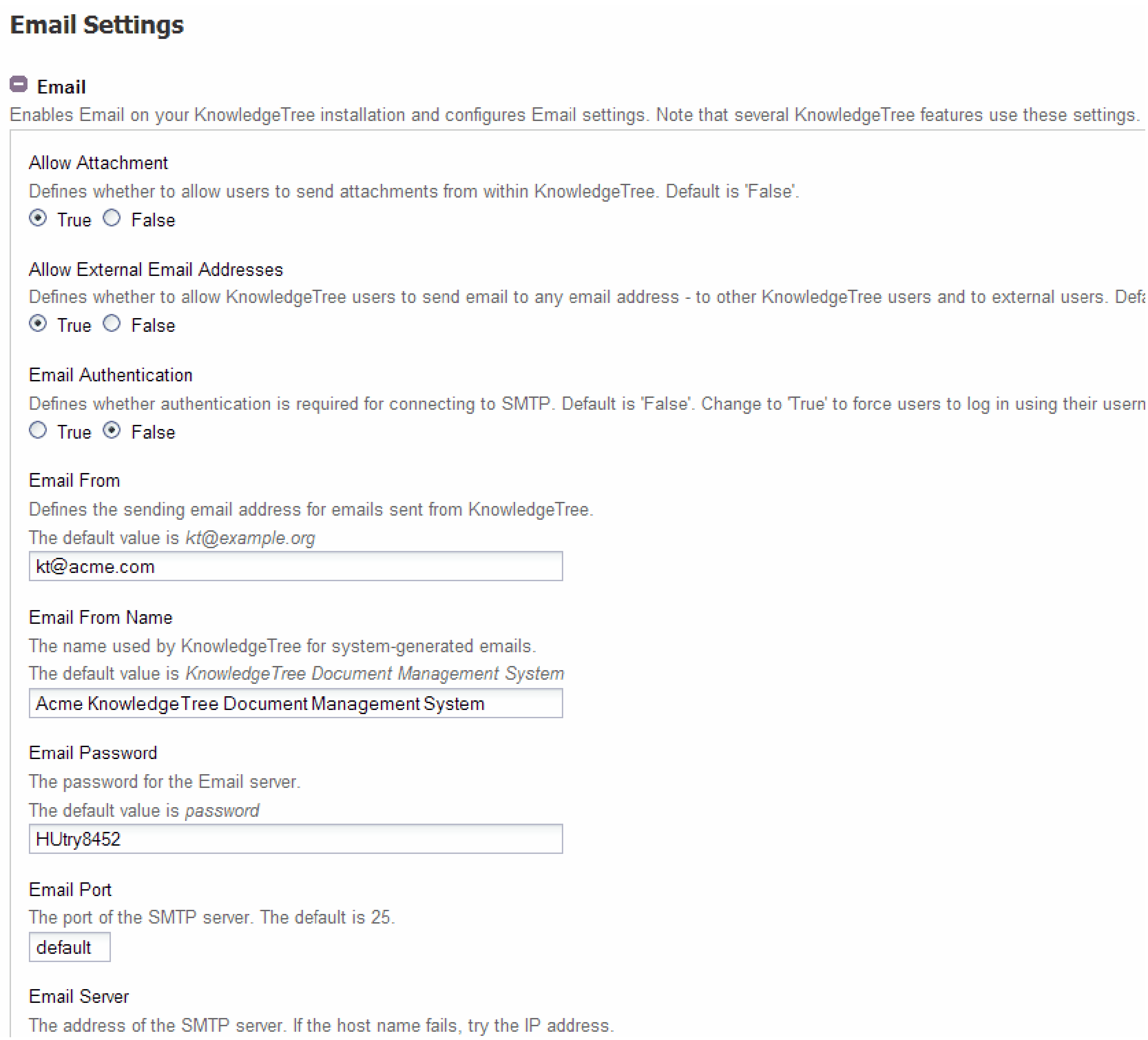
The System Configuration interface provides access to the following settings:

- **Client Tools** - view and edit settings for the KnowledgeTree Tools server, Client Tools policies, WebDAV, and the OpenOffice.org service



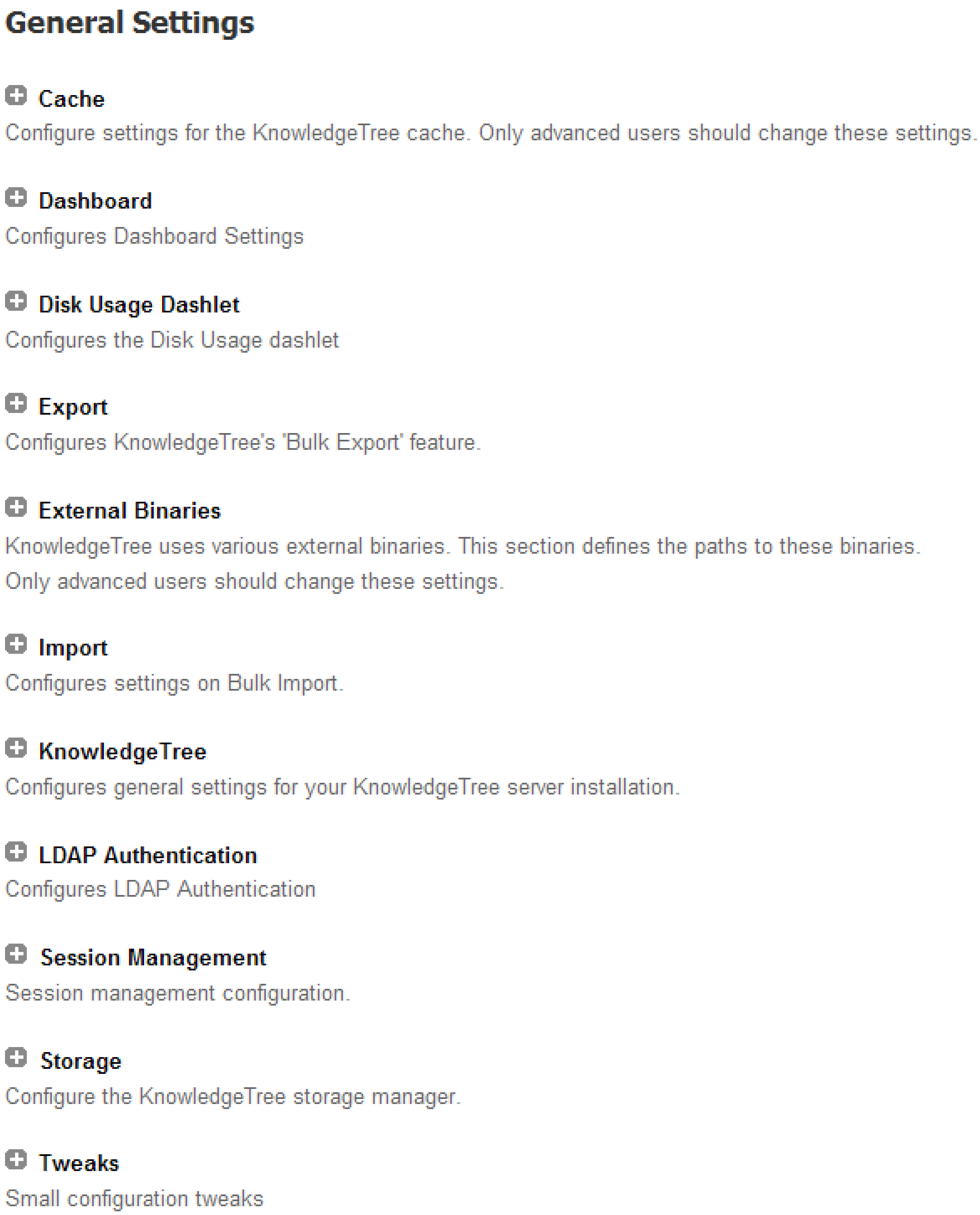
Configure Client Tools

- **Email** - configure emailing on the KnowledgeTree server; define the sending email server address, email password, email port, user name, and view and modify policies for emailing documents and attachments from KnowledgeTree



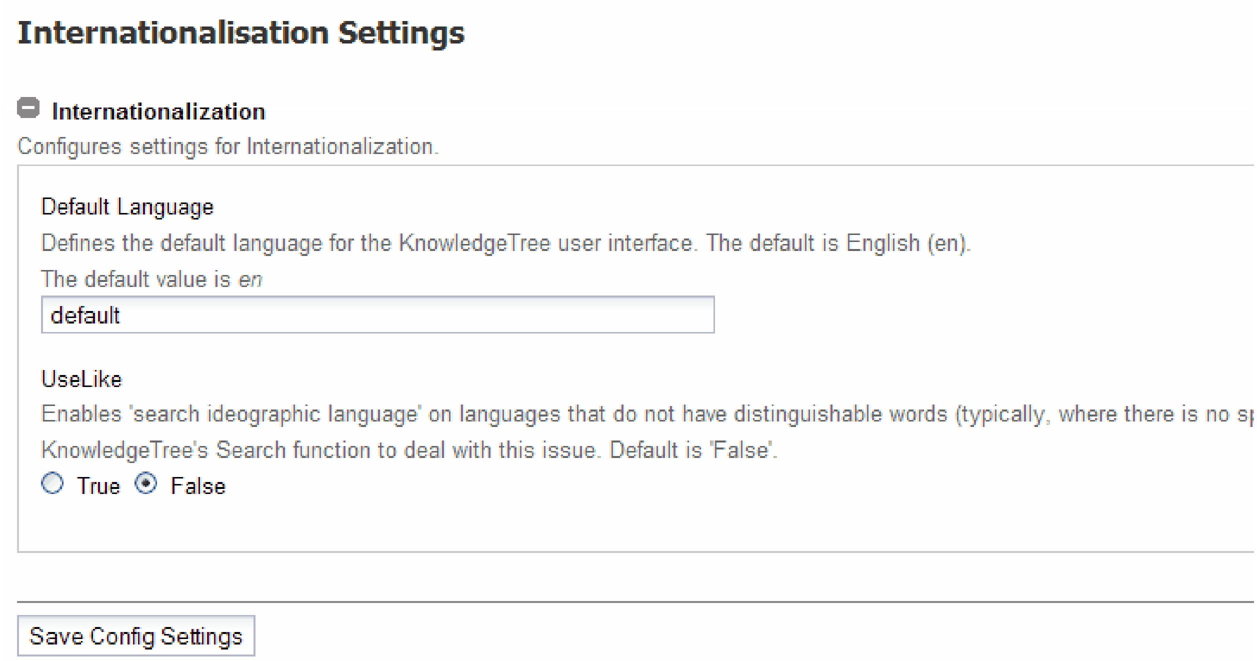
Configure Email Settings

- **General settings** - configure settings for the KnowledgeTree cache, custom error message handling, disk usage threshold percentages, location of zip binary, paths to external binaries, general server configuration, LDAP authentication, session management, KnowledgeTree storage manager, miscellaneous tweaks, and whether to always display the 'Your Checked-out Documents' dashlet



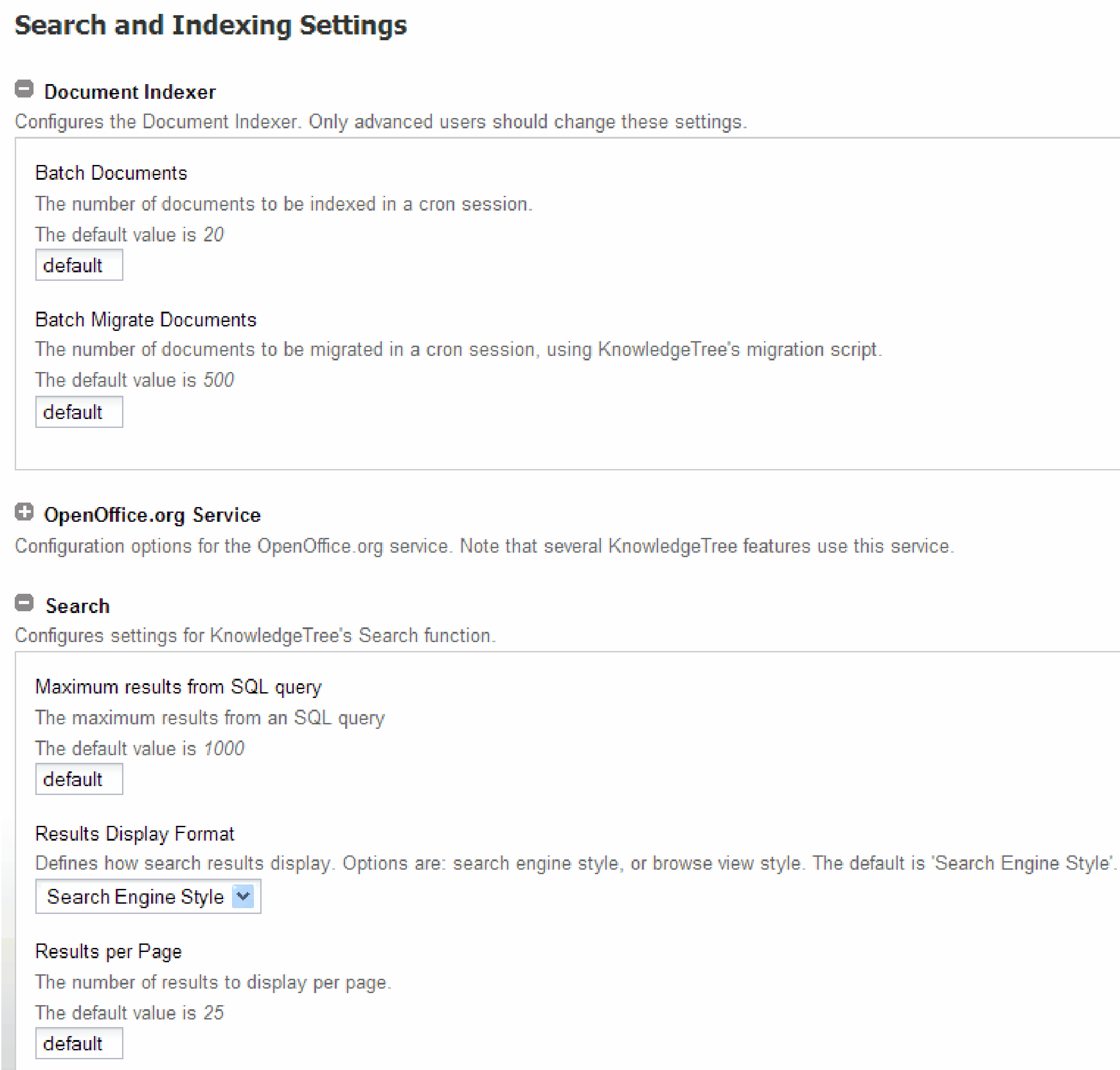
Configure General Settings

- **Internationalization** - view and modify the default language for the interface



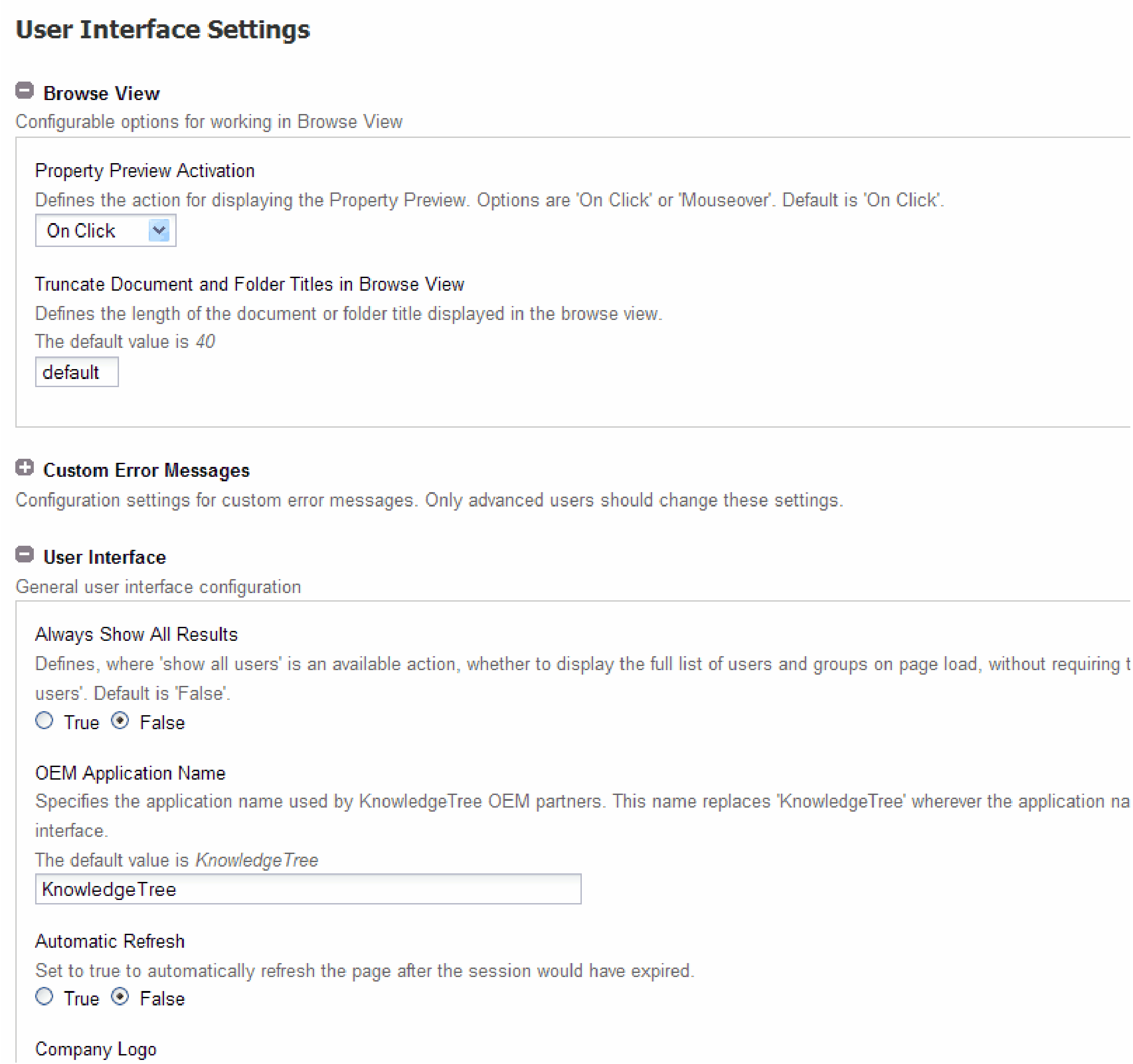
Configure Internationalization

- **Search and Indexing** - view and modify the number of documents indexed and/or migrated in a cron session, core indexing class, paths to the extractor hook, text extractors, indexing engine, Lucene indexes, and the Java Lucene URL. View and modify search date format, paths to search, indexing fields and libraries, results display format, and results per page



Configure Search and Indexing

- **User interface** - configure the following settings for the user interface: Browse View actions, OEM name, automatic refresh, search results restrictions, custom logo details, paths to dot binary, graphics, and log directory, and whether to enable or disable condensed UI, 'open' from downloads, sort metadata, and skinning



Configure the User Interface

3.4.18.1 Enabling / Configuring Emailing from KnowledgeTree

This procedure edits email settings on the KnowledgeTree server in order to enable emailing from within KnowledgeTree, and to define email rules.

Note: *The* ***Mail Server Status*** *dashlet displays on the dashboard until you enable emailing.*

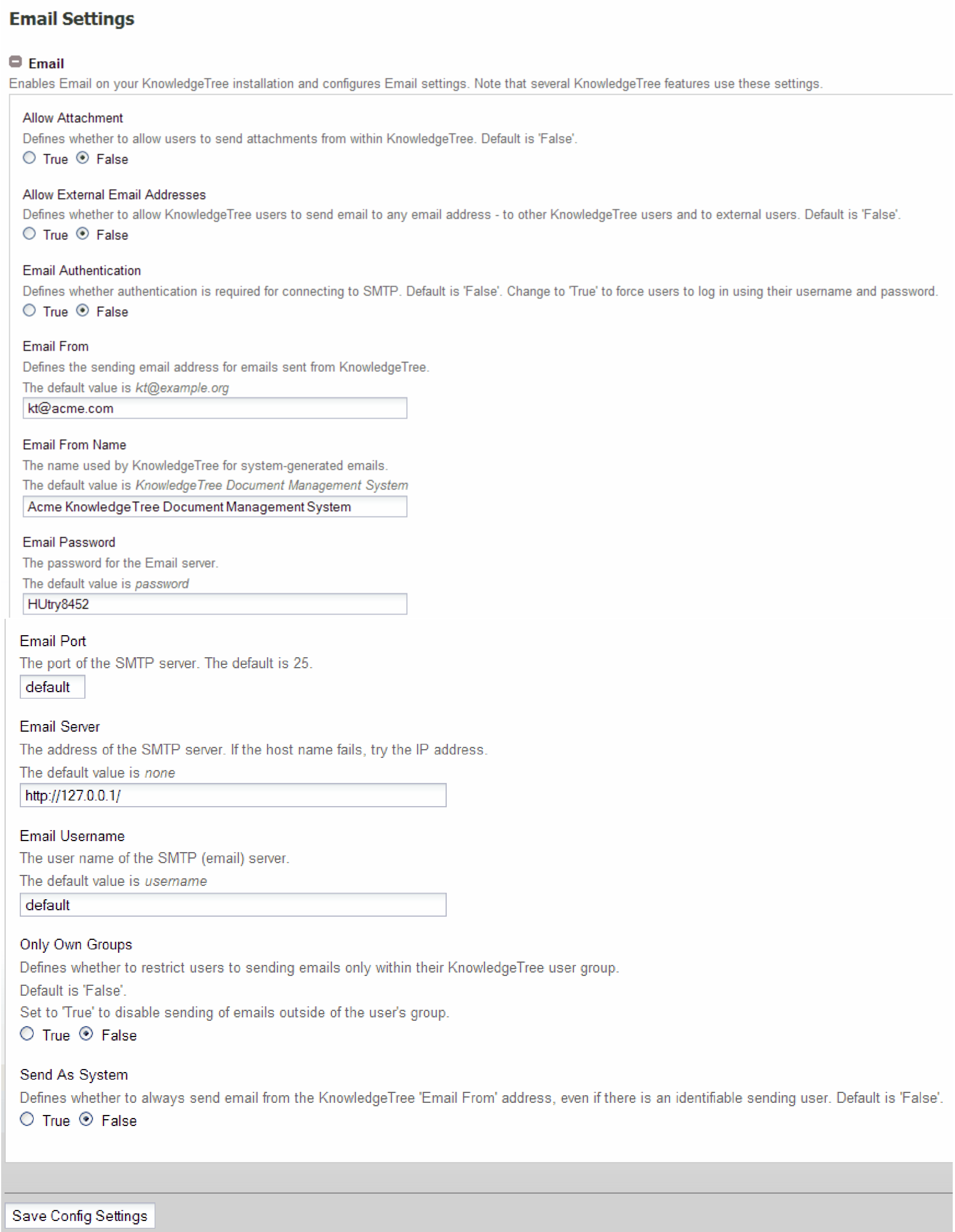
Perform the following steps:

1. Use your administrator username and password to log in to KnowledgeTree's web interface; then, go to **DMS Administration - System Configuration - Email** to open the Email Settings configuration page (see screenshot below).

2. The following policies are configurable:

- whether to allow users to send attachments from within KnowledgeTree (the document is sent as an attachment)
- whether to allow sending of emails to external email addresses (you can enter the email address of recipients directly)
  Note: *Set both of the settings above to* true *to allow KnowledgeTree users to email documents or file links to external users. By default, KnowledgeTree sends recipients a link to the document. External users receive a unique, one-time download link directly to the document - log in is not required as they will have no other access to KnowledgeTree.*
- whether authentication is required for connecting to SMTP
- the sending email address for emails sent from KnowledgeTree
- the senders name, for emails sent from KnowledgeTree
- the email password
- the email port
- the address of the SMTP server (the IP address of your email proxy server, or name of your server)
- the email username
- whether to restrict sending of emails to within the sender's own groups
- whether to always send email from the 'email from' address

3. When you're done, click ***Save Config Settings***. Email notification is now enabled on the KnowledgeTree server, and the Mail Server Status dashlet no longer displays on the dashboard.



Email Settings

Email

Enables Email on your KnowledgeTree installation and configures Email settings. Note that several KnowledgeTree features use these settings.

Allow Attachment

Defines whether to allow users to send attachments from within KnowledgeTree. Default is 'False'.

True False

Allow External Email Addresses

Defines whether to allow KnowledgeTree users to send email to any email address - to other KnowledgeTree users and to external users. Default is 'False'.

True False

Email Authentication

Defines whether authentication is required for connecting to SMTP. Default is 'False'. Change to 'True' to force users to log in using their username and password.

True False

Email From

Defines the sending email address for emails sent from KnowledgeTree.

The default value is *kt@example.org*

kt@acme.com

Email From Name

The name used by KnowledgeTree for system-generated emails.

The default value is *KnowledgeTree Document Management System*

Acme KnowledgeTree Document Management System

Email Password

The password for the Email server.

The default value is *password*

HUtry8452

Email Port

The port of the SMTP server. The default is 25.

default

Email Server

The address of the SMTP server. If the host name fails, try the IP address.

The default value is *none*

http://127.0.0.1/

Email Username

The user name of the SMTP (email) server.

The default value is *username*

default

Only Own Groups

Defines whether to restrict users to sending emails only within their KnowledgeTree user group.

Default is 'False'.

Set to 'True' to disable sending of emails outside of the user's group.

True False

Send As System

Defines whether to always send email from the KnowledgeTree 'Email From' address, even if there is an identifiable sending user. Default is 'False'.

True False

Save Config Settings

3.4.18.2 Allowing Anonymous Login

This procedure allows anonymous users to log in to the system.

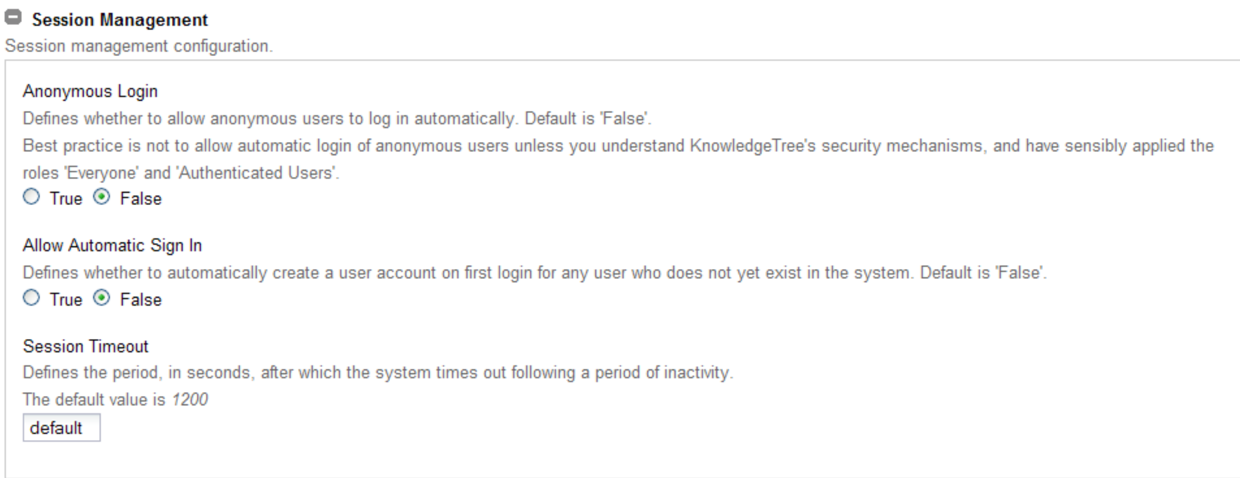
Note: *The default is* False*, which disallows anonymous login; changing this setting is not recommended unless KnowledgeTree's security features are well understood, and the roles 'Everyone' and 'Authenticated Users' are sensibly applied.*

Perform the following steps:

1. Use your administrator username and password to log in to KnowledgeTree's web interface; then, go to **DMS Administration - System Configuration - General Settings** to open the configuration screen for these settings.

2. Locate the **Session Management** parameter; then, change the **Anonymous Login** setting to *True*.

3. Click ***Save Config Settings***.



Session Management

3.4.19 Reporting

You can generate the following types of user activity reports in KnowledgeTree's web interface, in **DMS Administration - Reporting**:

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

- Last Login Information Report
  This report allows you to see the last time any system user has logged in - define either:
  - last login for all system users; or,
  - last login for any system users who have logged in over a predefined past period - a predefined number of days, weeks, months, or years

- Login Activity Report
  This report allows you to view a full login history for all system users, with two options:
  - display full login activity, for all users, over a predefined past number of days, weeks, months, or years; or,

- display full login activity, for all users, from a specified start period, to a specified end period.

Note: *For this option, a 'date and time' calendar function allows you to select a specified date and time for the start period and the end period.*

⊟ Full Login History
This report displays a full login history for a specified user, since this user was added to the system.

3.4.19.1 Generating User Activity Reports

This procedure generates various types of user activity reports - last login information, login activity, full login history.

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

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **DMS Administration - Reporting - User Reports** to open the report generation interface.

2. **What type of report do you want?**

   - **I want to see the last time any system user logged in to the system?** In the Last login information section, select the **Show all users** radio button; then, click **Show**.

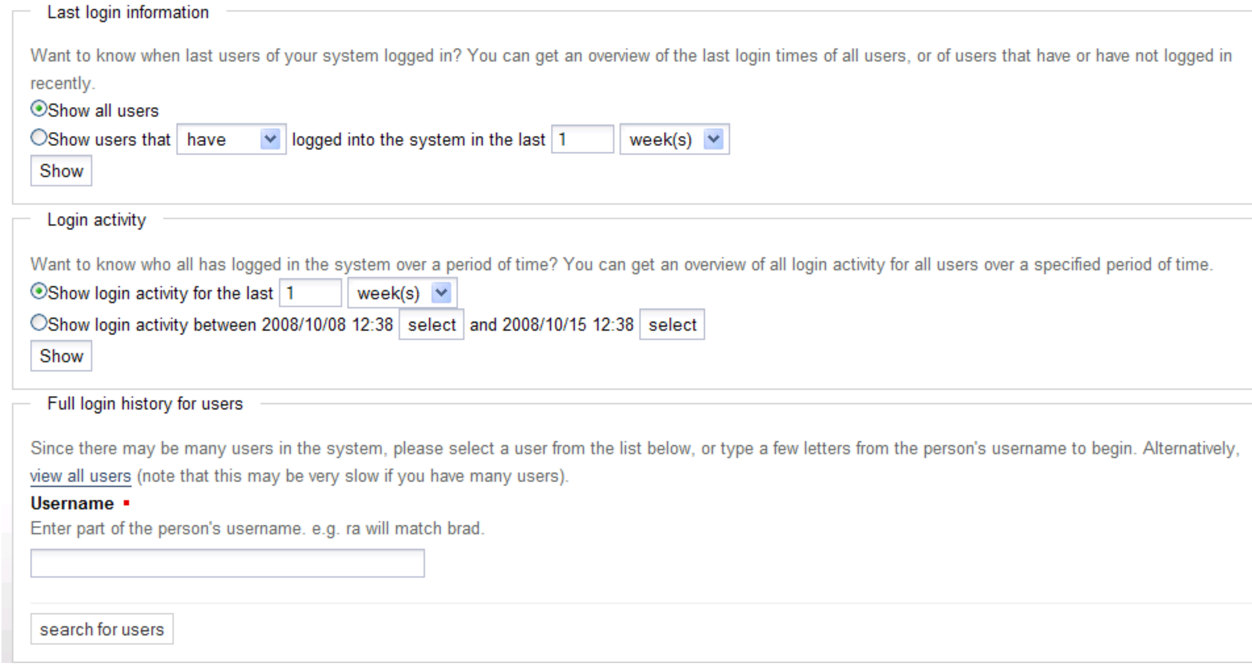
   - **I want to see the last time any system user logged in to the system and show those users who have not logged in, over a predefined past period?** In the Last login information section, select the **Show users that ...** radio button; then, select **have** / **have not** in the first drop down. Define a past time period - a number of days, weeks, months, or years. When you're done, click **Show**.

   - **I want to see a full login history for all system users, over a predefined past period?** In the Login Activity section select the **Show login activity for the last ...** radio button; then, define a past time period - a number of days, weeks, months, or years. Click **Show**.

   - **I want to see a full login history, for all system users, between a specified start date and time, and a specified end date and time?** In the Login Activity section select the **Show login activity between ...** radio button. Now click the first **select** button to define a start date and time; then, click the second **select** button to define an end date and time. When you're done, click **Show**.

   - **I want to see a full login history for a specified system user, starting from the date this user was added to the system?** If you know the name of this user, enter the username, or the first few letters of the user name in the **Username** field; then, click **search for users**. Alternatively, click **view all users** to display a list of all system users. In the list that displays (single user, or all users), click **View** to display the Login History report for the user.

User Reporting



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