User Manual

KnowledgeTree
Document Management System

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http://www.ktdms.com/

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http://www.ktdms.com/support

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2   Preface

The Jam Warehouse **KnowledgeTree™ User Manual** is a comprehensive guide to using the **KnowledgeTree Document Management System**. These instructions are intended for end users of the KnowledgeTree Document Management System.

Please Note:
These manuals are continually being updated, and 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.ktdms.com.

For more information about using KnowledgeTree please visit the KnowledgeTree website at http://www.ktdms.com/.

3   Typographic Conventions

Typeface / or Symbol	Meaning	Example
`AaBbCc123`	The names of commands, files, and directories; on-screen computer output	`cat /tmp/file`
`AaBbCc123`	What you type, contrasted with on-screen computer output	`machine_name%` **`su`**
`AaBbCc123`	Command-line placeholder: replace with a real name or value	To delete a file, type **`rm`** *`filename`*.
AaBbCc123	Book titles, new words, or terms, or words to be emphasized.	Read Chapter 2 in **Quick Start for Administrators**.

4   Getting Help

Jam Warehouse Software offers **commercial support** options for KnowledgeTree Professional.

Find out more about support and licensing options for **KnowledgeTree Professional** at the KnowledgeTree website -
http://www.ktdms.com/products/knowledgetree-support

Getting help for KnowledgeTree Open Source

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

Important
The KnowledgeTree website provides a variety of links to useful resources for all KnowledgeTree users - both Professional and Open Source.

5   Welcome to KnowledgeTree

KnowledgeTree^{TM} is a commercial open source, Web-based, Document Management System.

KnowledgeTree allows you to move away from uncontrolled and unaudited shared network drives to an environment that encourages knowledge sharing and meets regulatory requirements, such as the Sarbanes-Oxley Act (SOX), SEC Rule 17a-4 and FDA 21CFR11.

There are two editions of KnowledgeTree Document Management System:

- **KnowledgeTree Open Source** - free to download

- **KnowledgeTree Professional** - certified version of the KnowledgeTree Document Management System that extends the functionality of the Open Source edition, and includes a set of tools to provide a familiar Windows® Explorer and Microsoft® Office® view of the document repository.

This image denotes functionality that is only available to users of KnowledgeTree Professional

Professional

These features require KT Professional
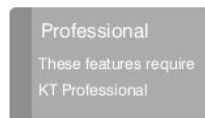
Features

KnowledgeTree provides:
- A central document repository with audited document content version control

- Powerful document metadata management and versioning

- Sophisticated document authoring management and workflow

- Full-text indexing technology allowing search within document contents

- Powerful security group and role-based security model and integration with Directory Servers

5.1   Overview

5.1.1   Organizational Hierarchy

KnowledgeTree^{TM} is a goal and task oriented environment, which uses **Groups** and **Units** as a dynamic and flexible method of grouping people to include key personnel for any business process or decision.

KnowledgeTree users are organized on two levels:
- **Group level** - a group contains one or more users

- **Unit level** - a unit contains one or more groups. Units model your organization's business units, e.g. Quality Assurance, or Human Resources.

Users may belong to one or more **Groups**; these **Groups** are added to one or more **Units**.

Note: Only your KnowledgeTree system administrator is allowed to create, modify, or delete these groupings.

Content Organization

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

5.1.2   Permissions

KnowledgeTree permissions are used to control access to content in the repository, and are set up by group (e.g. Project Managers), by role (e.g. Management), and by folder.

Some folders may be made accessible to everyone in your organization, other folders will be restricted. You will only be able to view or modify a document if you belong to a Group or a Unit that has the appropriate view/edit permissions at that location.

Permissions that are granted for the folder also apply to all the documents in the folder, and to all its sub-folders (unless otherwise specified). By default, newly created sub-folders inherit the permissions of the parent folder, but you can override these inherited permissions.

When you change permissions on the sub-folder you switch off **inherit permissions**. Then, when changes are subsequently made to the permissions of the parent folder, those changes no longer pass down to the sub-folder. You will need to re-enable **inherit permissions** on the sub-folder.

*Note: You can only enable or disable inherit permission if you have the **Manage Permissions** permission on the folder. Alternatively, ask your systems administrator for assistance. Non-administrative users use the **Permissions** link on the **Folder Actions** menu in **Browse Documents** to view permissions set up for specific folders.*

Core Permissions

KnowledgeTree provides the following core (default) permissions:

- **Read** – allows you to view the document and its metadata, but you are not allowed to make any changes. Where you do not have **read** permissions on a document, that document will not be returned in search results, and it won't display in your view of the folder structure.

- **Write** – allows check out / check in, and you can change the contents of the document, as well as its metadata.

- **Add Folder** – allows you to create and edit sub-folders in a parent folder where you have this permission.

- **Manage Permissions** – allows you to edit permissions on sub-folders.

- **Delete** – allows you to delete files and sub-folders in a parent folder where you have this permission.

- **Manage workflow** - allows you to change the workflow settings (i.e. perform a transition).

5.1.3   Notifications / Alerts

Notifications are system-generated messages that display on the **Dashboard** to inform you of relevant events and situations. KnowledgeTree provides an email notification feature that can be switched on to send your notifications by email.

Note: *You can switch email notifications on or off for your user profile on the **Preferences** tab.*

Their are two types of default notifications in KnowledgeTree:
- **Subscription alerts -** informs you when a document (including document metadata), or a folder that you're watching, is checked out, or deleted, or if it changes in some other way.

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

5.1.4   Version Control

KnowledgeTree^{TM} has powerful document version control features, which ensure that the editing and versioning of documents is done in a controlled and auditable manner.

Check out / Check in, and Incremented Versions
Check out
The system only allows one user at a time to check out a document for editing. Checking a document out of the repository locks the file and makes it **read only**. Other users can view the file, but they cannot change it.

You can view the list of documents you have checked out (if any) in the **Checked out documents** section of the Dashboard.

Check in
When you have completed your changes, you need to check the file back into the repository to make it available to other users for editing. When checking in the

document, you can add a comment to describe the changes you made.

If you decide not to commit the changes you made, use the **cancel check-out** option in the Document Actions menu to restore the document to the version prior to check out. You can also ask the system administrator to force a document check in if the person who checked the document out is not available to check the document back in.

Incremented Versions

By default, new documents that you add to the KnowledgeTree are given version number 0.1. When you check out the document for editing, the system increments the version number by 0.1 when the document is checked in. Each subsequent check out / check in causes the version number to increment by 0.1 – for example, version 0.9 becomes 0.10; and version 0.19 becomes version 0.20. You can view a history of all the versions of a document by selecting **Version History** in the **Document Actions** menu.

5.2   KnowledgeTree Editions

5.2.1   What is KnowledgeTree Open Source?

KnowledgeTree^{TM} Open Source is the free, open source edition of the Web-based KnowledgeTree Document Management System.

Because it's open source, the product can be downloaded and installed at no cost. KnowledgeTree Open Source is suitable in many document and records management scenarios.

5.2.2   What is KnowledgeTree Professional?

KnowledgeTree Professional is a certified version of KnowledgeTree Document Management System, which extends the **KnowledgeTree Open Source** feature set and brings document management to your desktop in a familiar Windows® Explorer and Microsoft® Office® interface.

KnowledgeTree Professional includes:

- **KnowledgeTree Integration Server (KTIS)** - a server component that allows you to log in to the web-interface DMS through KnowledgeTree Explorer.

- **KnowledgeTree Client Tools for Windows (KTtools)** - a set of client-side tools for Windows users that allow you to work with content in the repository as though you're working on your local computer.

The KnowledgeTree Client Tools toolset contains:

- **KnowledgeTree Explorer** - a Windows Explorer-type application that provides a file browser view of the document repository.

- **KnowledgeTree Office Add-in** - a Microsoft Office Add-in that allows you to access KnowledgeTree functionality from within Microsoft Office applications.

- **KnowledgeTree Desktop Imaging** - a tool that allows you to scan documents directly into the KnowledgeTree repository.

Note: Only users with valid licenses for KnowledgeTree Professional have access to KnowledgeTree Explorer. Please speak to your KnowledgeTree system administrator for more information.
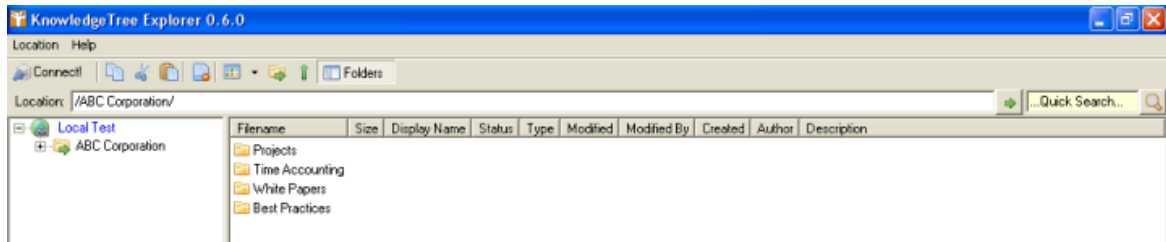

Figure: KnowledgeTree Explorer

5.3 Login

5.3.1 Logging in to the Web-interface DMS

This procedure logs you in to the Web-Interface of the KnowledgeTree Document Management System.

*Note: This is the only login option available to users of **KnowledgeTree Open Source**. If you have access to **KnowledgeTree Professional**, you can log in to the Web-Interface DMS, or you can log in via KnowledgeTree Integration Server (KTIS) to work with content in the repository from within KnowledgeTree Explorer.*

*Note: By default, the system logs you out after a period of inactivity, and it recognizes that you have not used the **Logout** button to exit your session. When logging in again, the system re-opens at the location where you ended your last working session.*

Perform the following steps:
1. Use your Web browser to locate the **Login** page for the KnowledgeTree Document Management System.

2. Enter your login details in the **Username** and **Password** fields.
   *Note: Your username and your password are case-sensitive, so ensure that your keyboard **Caps Lock** key if off when entering your login credentials.*

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

Figure: Login Page

5.3.2   Logging in to KnowledgeTree Explorer

This procedure logs you in to **KnowledgeTree Explorer** via the
KnowledgeTree Integration Server (KTIS).

*Note: Only users with valid KnowledgeTree Professional licenses are able to log in to
KnowledgeTree Explorer. Please ask your KnowledgeTree systems administrator for licensing
assistance.*

Prerequisites:

You will need *all* of the following:
- KnowledgeTree Professional Installed
- KnowledgeTree Tools installed
- KnowledgeTree Professional license allocated to you
- Valid connection configured with the KnowledgeTree server

*Note: Speak to your systems administrator if you're unsure whether or not your scenario
meets all of these prerequisites.*

Perform the following steps:

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

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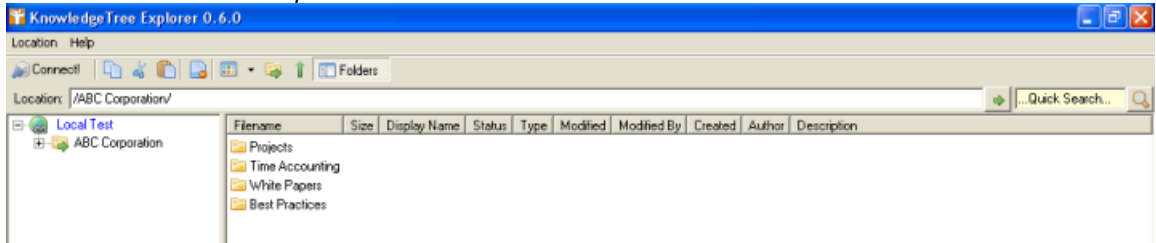
have at least 'read' permissions in the DMS.

Figure: KnowledgeTree Explorer - files and folders loaded

6   Working in KnowledgeTree Explorer - KnowledgeTree Professional

This section provides information on working with content in the repository using KnowledgeTree Professional's KnowledgeTree Tools, which includes:

- KnowledgeTree Explorer

- KnowledgeTree Office Add-in

- KnowledgeTree Desktop Imaging

6.1   KnowledgeTree Explorer

KnowledgeTree Explorer is a component of KnowledgeTree Client Tools for Windows (KTtools) that allows you to work with content in the KnowledgeTree repository from within a familiar Windows Explorer-type interface.
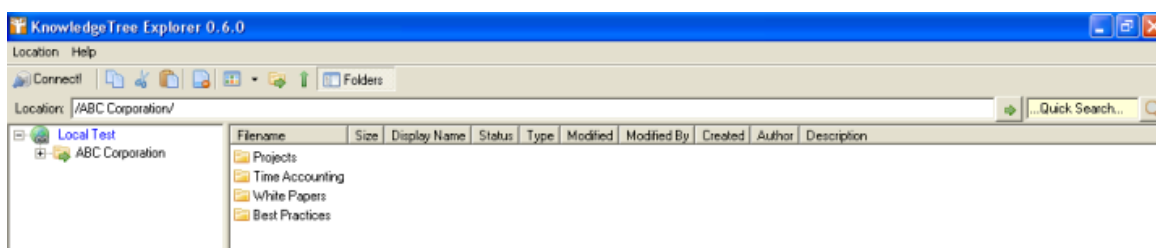

Figure: KnowledgeTree Explorer

The Interface

File / Folder Structure

KnowledgeTree Explorer uses the same hierarchical file and folder structure as the Web-Interface KnowledgeTree Document Management System.

The KnowledgeTree Explorer Interface has the look and feel of the Windows Explorer Interface - folders display in the left pane of the window, and the contents of any selected folder displays in the right pane.

Right Pane Columns

Filename

The unique name of the file on the file system.

Size

The size of the file.

Display Name

The document title. This is the name that displays in the **Title** column in Browse Documents.

Status

Informs you if the document is checked out, and by whom.

Type

The document type.

Modified

The last date this document was edited.

Modified By

The name of the last user who edited this document.

Created

The date this document was first added to the repository.

6.1.1   Working in KnowledgeTree Explorer

KnowledgeTree Explorer provides a familiar Windows Explorer-type view of the KnowledgeTree Document Management System, where you can work with content in the Web-interface DMS as though you're working on your local computer.

Note: *Only licensed users of KnowledgeTree Professional have access to KnowledgeTree Explorer. Please ask your KnowledgeTree administrator for assistance.*
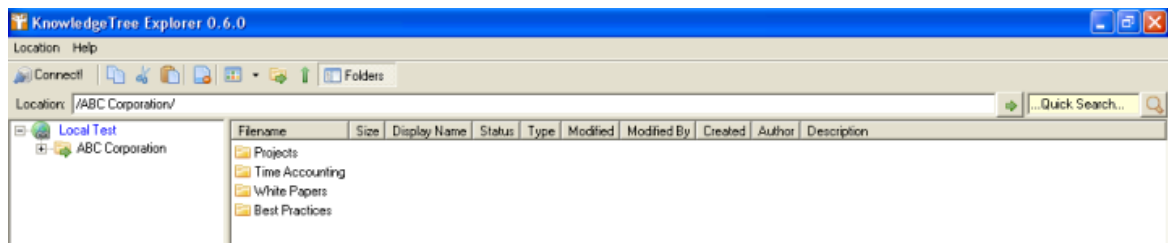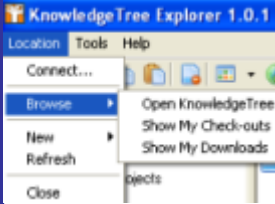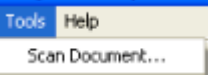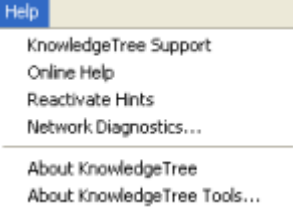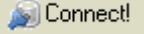

Figure: KnowledgeTree Explorer
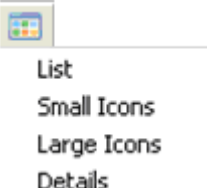
Actions

Toolbar: Menus, Fields, Buttons

Click...	Result

Location Menu	Connect		Opens the **KT Server Connections** dialog, where you can configure (add/remove/test) server connections with the KnowledgeTree Document Management System; or select a connection to use.
	Browse	Open KnowledgeTree	Opens the **KT Server Connections** dialog box, where you can select the server connection you want to use to the KnowledgeTree Document Management System. Click **Connect** to load the content from within the KnowledgeTree Document Management System into the KnowledgeTree Explorer Interface.
		Show My Check-outs	Opens the **Checked Out** folder on your local computer, where you can view a list of the documents you have checked out.
		Show My Downloads	Opens the **Downloaded** folder on your local computer, where you can view a list of the documents you have downloaded.
	New	Document	Opens the **Open** dialog box, where you can navigate to the document that you want to add to the repository.
		Folder	Opens the **Folder Properties** dialog box, where you can define a name for the new folder. Click **Ok** to add the folder. The folder displays in the file/folder structure.
	Refresh		Reloads the files and folders from the repository to provide an updated view of content in the KnowledgeTree Document Management System.
	Close		Closes KnowledgeTree Explorer.

Tools 	*Scan Document*	Launches KnowledgeTree Desktop Imaging, which you use to scan documents directly into the repository.
Help 	*KnowledgeTree Support*	Opens the support page at the KnowledgeTree website.
	Online Help	
	Reactivate Hints	
	Network Diagnostics	Opens your operating system's Help and Support page, where you can scan your your system for a report on network usage and conditions. When scan completes, save the report to file for error analysis. ***Note:*** *If you are receiving support for your issue, you may be requested to send the diagnostic information to a particular member of KnowledgeTree Support. The file contains private information about your network and should not be distributed to anyone other than the requesting KnowledgeTree support staff member.*
	About KnowledgeTree	Opens the KnowledgeTree Document Management System website.
	About KnowledgeTree Tools	Opens a system information screen, where you can view details for your version of KnowledgeTree Explorer.
Connect button 		Opens the **KT Server Connections** dialog box, where you can define or select the server connection to the KnowledgeTree Document Management System.

Location field Location: /ABC Corporation/Best Practices →	Displays the path to the currently selected file/folder. You can also type the path in this field and click the arrow to locate the file / folder specified in the field.
Quick Search field ...Quick Search... 🔍	Click in the field to specify a search term; then, click the adjacent icon to display search results.
Copy	Copies the item you select in the window to the clipboard.
Paste	Pastes the item you copied or cut, from the clipboard.
Delete selected items	Removes the items you selected from the server.
Toggle the different view modes List Small Icons Large Icons Details	Click the down arrow adjacent to the toolbar icon to display toggle options in the drop down menu.
Navigate to root folder	Goes to the root folder for the currently selected document or folder
Navigate to the current folders parent	Goes to the parent folder for the currently selected folder.
Toggle the folder browser on the left side Folders	Toggles the left pane folder view to display or hide it.

Left Pane: Right Click Menu
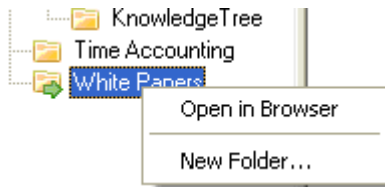
Click...	Result
Open in Browser	Navigates to the file location for the folder/file in the Web-based Document Management System. ***Note:*** *You need to enter your login credentials at the **Login** page to gain access to the repository via the Web interface.*
New Folder...	Opens the **Folder Properties** dialog box, where you can define a name for the new folder; then, click **Ok** to add the folder. The folder you added now displays as part of the file and folder structure in KnowledgeTree Explorer.

Right Pane: Right Click Menu
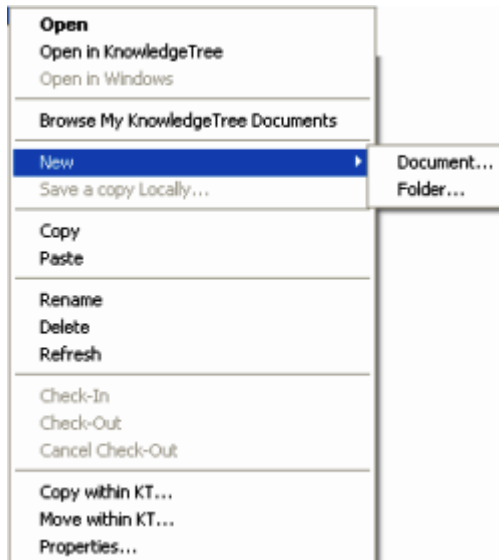
Click...	Result
Open	Opens the folder, or, if you right clicked on a document, saves a read-only copy of the file locally, to your **My KnowledgeTree Downloads** folder, and opens the document.
Open in KnowledgeTree	Opens the document's **Display Details** page in **Browse Documents**. ***Note:*** *You need to login to gain access to the Web-interface repository.*

Open in Windows		Saves a read-only copy of the file locally, to your **My KnowledgeTree Downloads** folder, and opens the document.
Browse My KnowledgeTree Documents		Opens the **My KnowledgeTree Documents** folder on your local computer, where you can access your checked out documents or your downloaded documents.
New	*Document*	Allows you to navigate to the document on your local computer that you want to add to the KnowledgeTree Document Management System.
	Folder	Opens the **Folder Properties** dialog box, where you can define a name for the new folder; then, click **Ok** to add the folder. The folder you added now displays as part of the file and folder structure in the KnowledgeTree Explorer Interface.
Save a copy Locally...		Opens the **Save As** dialog box, where you can navigate to a location on your local computer to save a local copy of the file. *Note:* The document is read-only, so any changes you make to the file locally will not change the version in KnowledgeTree.
Copy		Copies a *read-only* version of the currently selected document to the clipboard. You can navigate to a location on your local computer, or select another location in KnowledgeTree Explorer, and paste the document at that location.
Paste		Pastes a document you copied or cut from a location in KnowledgeTree Explorer to a destination on your local computer; or, pastes a document you cut or copied from your local computer to a selected location in KnowledgeTree Explorer. **See also:** Add Document
Rename		Opens the **Details** tab in the Document Properties dialog box, where you can change the document's short name, description, and file name. **See also:** Rename
Delete		Removes the currently selected document from the server. **See also:** Delete

Refresh	Updates the document with any changes that have been made since you started your current working session in the repository.
Check-In	Checks the document back into the repository from the **CheckedOut** folder on your local computer. **See also:** Check in
Check-Out	Checks a document out to the **CheckedOut** folder on your local computer. **See also:** Check out ***Note:** Documents that have been checked out of the repository are highlighted.*
Cancel Check-Out	Overrides the check-out status of the selected document and restores the pre-checkout version in the repository. Any changes that have been made to the document while it was checked out are not saved. **See also:** Cancel Check out
Copy within KT	Opens a new connection to KnowledgeTree Explorer. Navigate to the destination folder. Click **Ok** to complete the action.
Move within KT	Opens a new connection to KnowledgeTree Explorer. Navigate to the new location for the document you're moving. Click **Ok** to complete this action.
Properties	Opens the Document Properties dialog box, where you can view and/or edit various information about the currently selected document.

6.1.1.1   View/Edit Document Properties

You use the **Document Properties** window in KnowledgeTree Explorer to view or edit various properties and functionality for the currently selected document.

***Note:** You need to have been allocated a license for using **KnowledgeTree Professional** in order to work with KTtools. Please ask your KnowledgeTree systems administrator for assistance.*

You can select the following tabs in this dialog box:
- Details tab
- Workflow tab
- Transactions tab

- [Versions tab](#)
- [Custom Properties tab](#)

Details Tab

You use this tab to view and/or edit the document name, file name, and various document properties and their values.
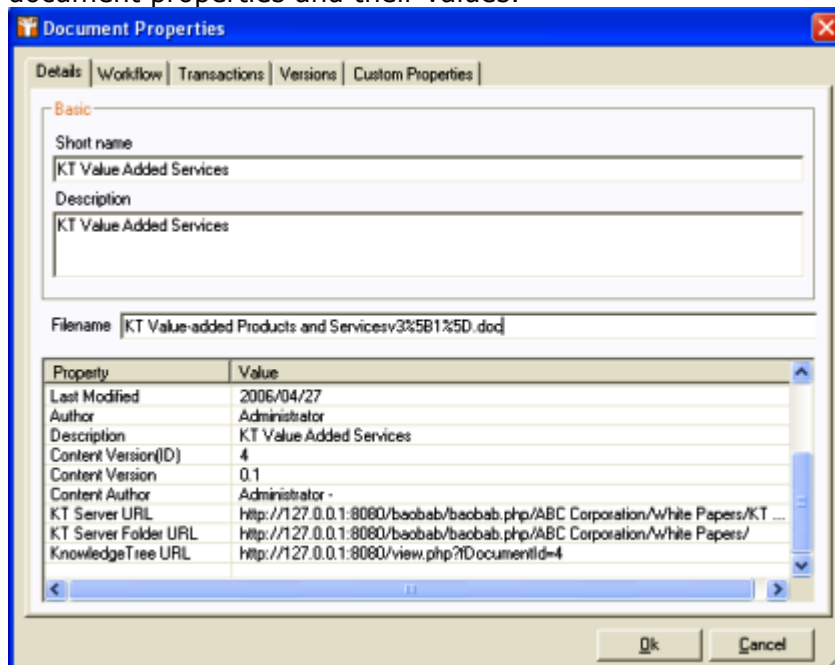
Figure: Details Tab

You can view and/or edit the following document details on the Details tab:

- name
- description

You can view the following document properties and their values on the Details tab:

- the date this document was last modified
- the user who last modified this document
- the document author
- description
- version ID
- version number
- content author
- the URL of the document on the KnowledgeTree server
- the URL for the document's folder location on the KnowledgeTree server
- the KnowledgeTree URL

Workflow Tab

You use this tab to view the selected document's current workflow, or to start a workflow.

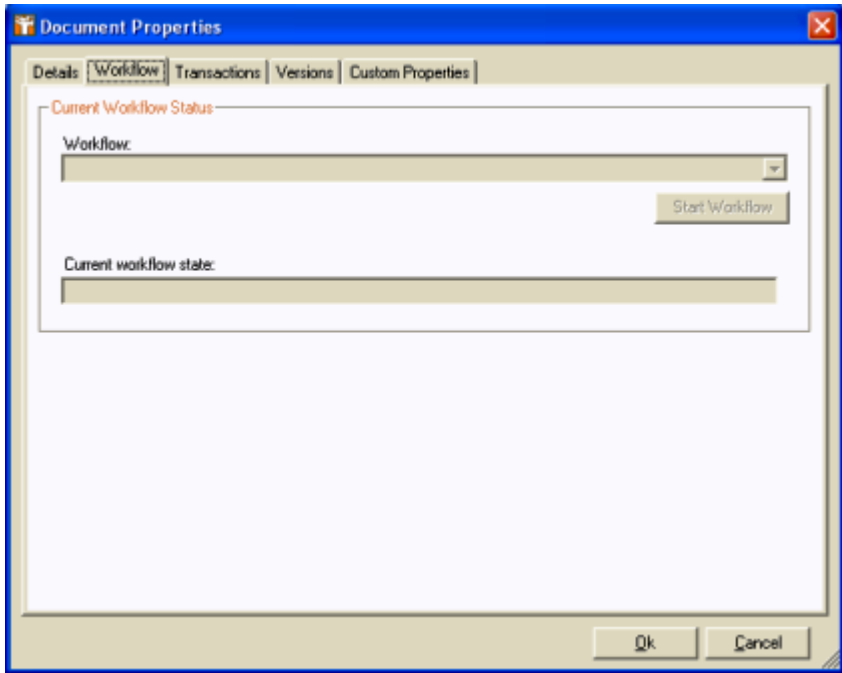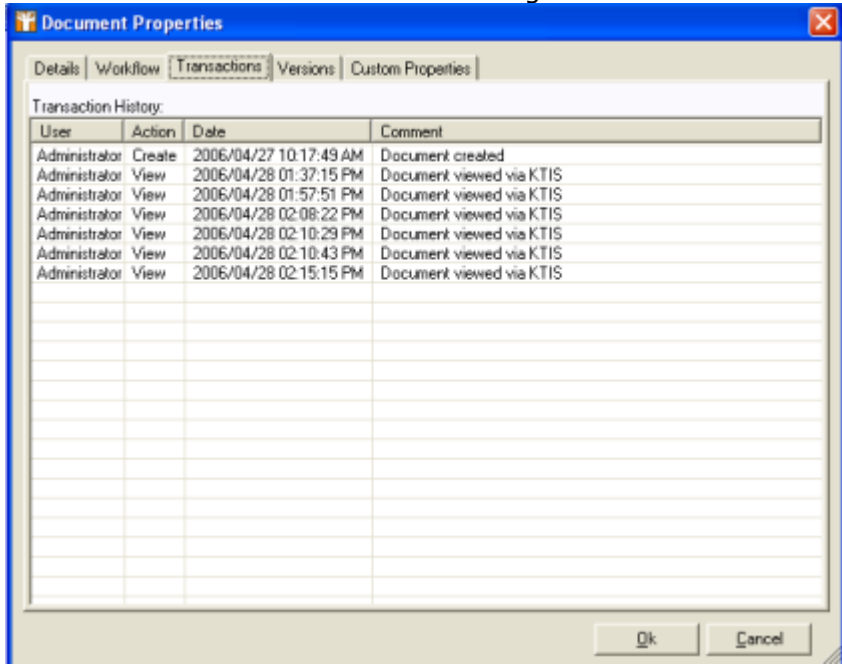**Figure: Workflow Tab**

Starting a Workflow

To start a workflow on this tab, click the down arrow at the **Workflow** field to select from a predefined list of workflows; then, click **Start Workflow**.

Transactions Tab

You use this tab to view all transactions that have been performed on this document since it was first added to the KnowledgeTree Document Management System.

Figure: Transactions Tab

Versions Tab

You use this tab to view a version history for the currently selected document. This tab displays the name of the user that created each version, and the date the version was created. It also displays a history of the content versions and metadata versions that exist for this document.

Figure: Versions Tab

Custom Properties Tab

This tab displays the document's custom metadata - custom fields and fieldsets for example.
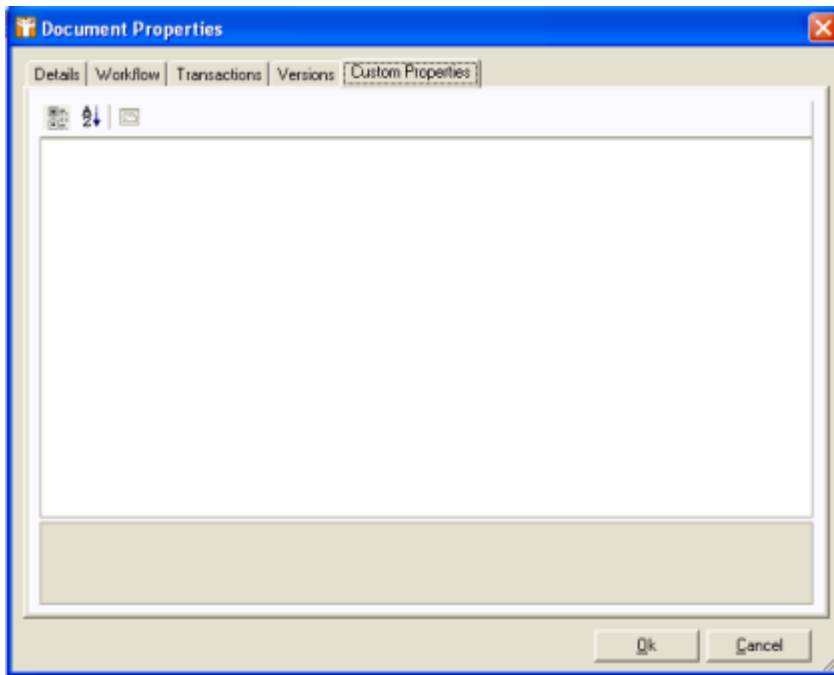
Figure: Custom Properties Tab

6.2   KnowledgeTree Desktop Imaging

KnowledgeTree Desktop Imaging is a scanning tool within the KTtools toolset that allows you to scan documents directly into the KnowledgeTree repository from within **KnowledgeTree Explorer**.

How are images acquired?

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

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

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

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

Can I view and change the order of the images I've scanned so far?

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

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

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

How are all my scanned images compiled and uploaded to KnowledgeTree?

When you have scanned all the pages that must be included in a document, you define the document title, file type, document type, and the destination folder location where you want to upload the scanned document in the KnowledgeTree repository.

Note: *At the time of writing (June 2006), KnowledgeTree Desktop Imaging saves all scanned images as file type **PDF**, and document type **Default**. Additional options will be built into later releases of the tool. Check the* [KnowledgeTree website](#) *for updates.*

6.2.1   Scanning with KnowledgeTree Desktop Imaging

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

Pre-requisites
You must have *all* of the following:
- KnowledgeTree Professional installed
- KnowledgeTree Tools installed
- Valid connection to KnowledgeTree Explorer
- KnowledgeTree Professional license
- External Twain-compliant imaging device (scanner), connected to your computer

Perform the following steps:
1. Log in to KnowledgeTree Explorer.
   Note: *Launch KnowledgeTree Explorer by clicking the KnowledgeTree Explorer icon on your desktop; or, use the **Start** menu (**Start - Programs - KnowledgeTree Tools -***

KnowledgeTree Explorer).

2. Are you using ...

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

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

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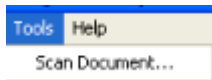

4. Click **Launch Scan Wizard** to open your scanner's user interface.
   Note: The KnowledgeTree Desktop Imaging tool's scan function applies the options you define in the native GUI.

5. Define scan options on the page; then, perform the scan.
   Note: The scanner interface that displays is specific to your external device. Refer to your scanner documentation for more information about defining scan options on this interface.
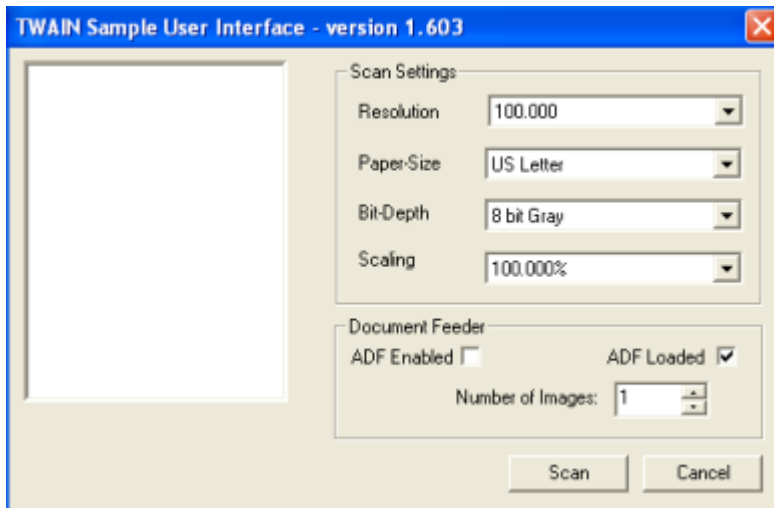
6. When the page/s have scanned, KnowledgeTree Desktop Imaging's Scanner Wizard opens **Review Pages**, where you can view all the pages you scanned for this document.

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

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

- **No.** Go to step 5.

5. Click **Continue** to open the **Metadata** page of the **Document Scanner Wizard**.
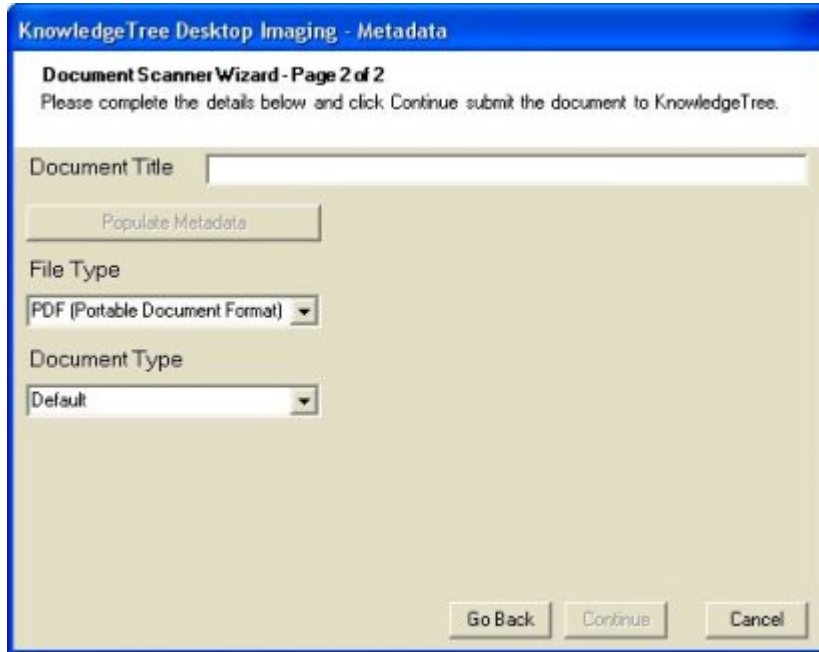
6. Enter the title of the document in the **Document Title** field; then, click **Continue** to open the **KnowledgeTree File** dialog box.

   *Note: At the time of writing (June 2006), KnowledgeTree Desktop Imaging saves all scanned pages as file type **PDF**, and document type **Default**. Additional options will be built into later releases of the tool. Check the [KnowledgeTree website](#) for updated information.*

7. Select the destination folder location; then, click **OK**.

8. A system message confirms that the document has been checked in to KnowledgeTree.
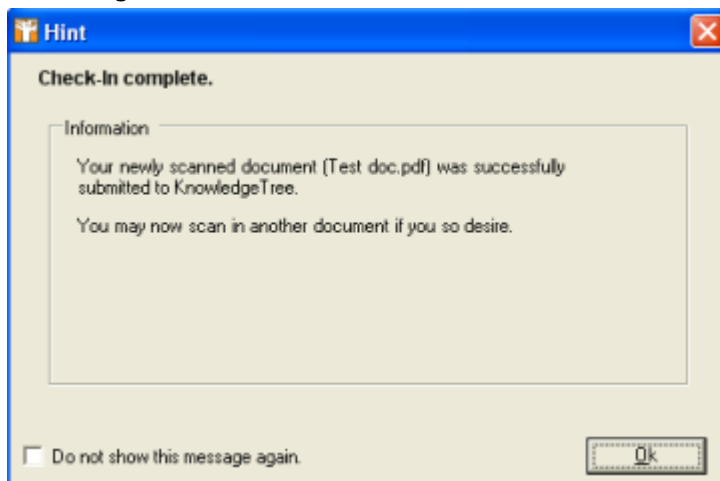
   Note: All scanned documents are added to the repository, where they are available for download, check out, email, etc. (depending on the permissions set for different users).
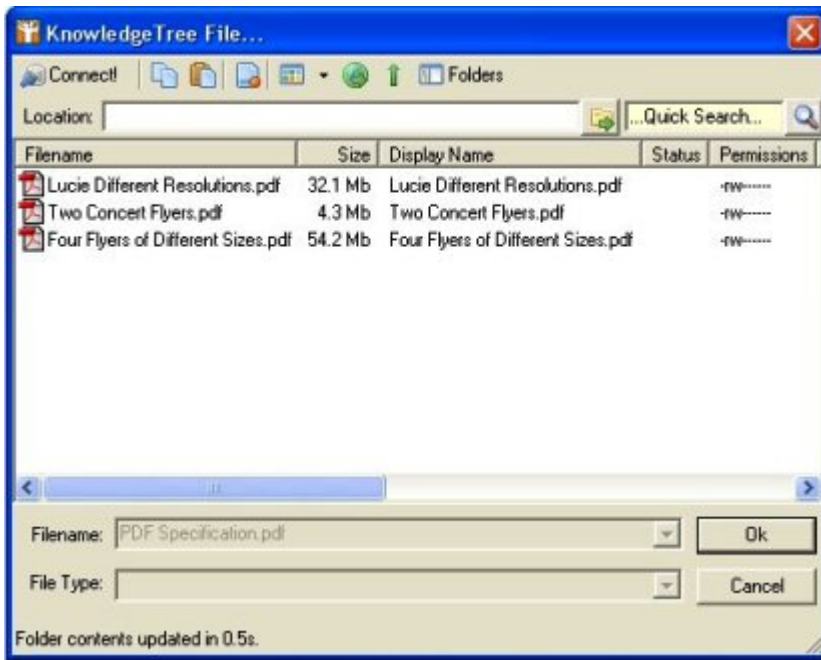
7 Working in the Web Interface DMS

The Open Source edition of KnowledgeTree Document Management System provides a Web-interface view of the repository.

KnowledgeTree Professional allows you to work with content in the repository through the Web-interface, or using KnowledgeTree Explorer.

7.1 Dashboard

When logging on to KnowledgeTree via your Web-browser the system opens at the **Dashboard**.

The Dashboard provides tabs for the following functionality:

- Browse Documents - use this tab to enter the folder structure

- Preferences - use this tab to define or edit your details

- Logout - use this button to close your current working session, and to exit the system

Figure: The Dashboard

7.1.1 Dashboard Features

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

Items that may be on your Dashboard:

- **Items that require your attention** - this section may include:
  - **notifications** – documents that you have subscribed to, and which have been added, deleted, or otherwise modified; documents requiring your input in the workflow cycle; as well as other system-generated notices.

  - **orphaned folders** – orphaned folders are sub folders of parent folders where you do not have the appropriate view or other permissions. You have permissions for accessing the orphan folder, but you are not allowed to access the parent folder. The dashboard provides a direct link to the orphaned folder in the repository. This is because you do not have permissions to navigate to the folder through its' parent folder.

- **Your Checked-out Documents** - this section lists the documents that you currently have checked out of the repository. You can click the link provided to go directly to the document in the repository, where you can download the document to view it, check the document back in, or cancel the document check out.

- **Search** - search for documents or folders in the repository directly from the Dashboard.

7.2   Browse Documents

You use the **Browse Documents** section of the KnowledgeTree Document Management System to enter the folder structure, where you can work with documents and folders in the repository.

KnowledgeTree
Professional   ***Note:*** *If your organization has purchased **KnowledgeTree Professional**, you can use **KnowledgeTree Tools for Windows (KTtools)** to work with content in the repository as though you're working on your local computer. Go to* *What is KnowledgeTree Professional?* *to find out more, or ask your KnowledgeTree system administrator for assistance. You will need to have been allocated a license for KnowledgeTree Professional in order to use KTtools.*

Folder View

By default, the right pane of the Browse Documents page displays a **Folder view** of the repository. This is the page that opens when you click the **Browse Documents** tab on the KnowledgeTree Document Management System toolbar.

Click on a folder to view its contents, or to drill down further into the KnowledgeTree folder structure.
Note: *The system only returns folders where you have read and/or write permissions.*
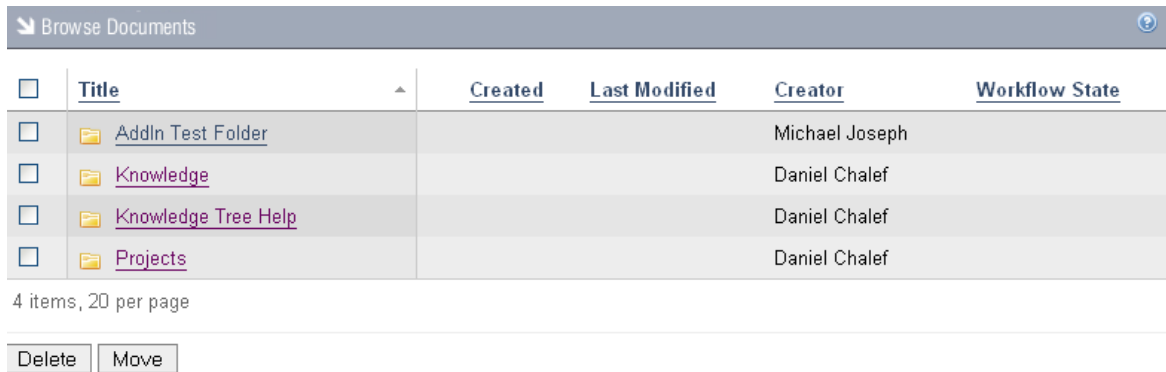
Figure: The Folder View in Browse Documents

Columns

The **Browse Documents** table lists the folders for which you have at least view permissions.

Column	Description
Check boxes	This column contains check boxes for selecting the items in the list that you want to **Delete** or **Move**. Select the check box at the top of the column (adjacent to the column header **Title**) to automatically select all the items in the list. Select the check box next to a folder/document title to move or delete these item. To delete the item(s) you selected, click the **Delete** button at the bottom of the table. To move the item(s) you selected to another location in the repository, click **Move**.
Title	This column lists the folders and documents in the repository that you are allowed to access. Click on a folder name to display the content of that folder. Use the adjacent arrow icon to change the sort order of items in the column.
Created	Sorts the items in the list by the date they were created. Use the adjacent arrow icon to change the sort order of items in the table.
Last Modified	Sorts the items in the list in order of the date a folder was last modified. Use the adjacent arrow icon to change the sort order of items in the table.
Creator	This column displays the name of the KnowledgeTree user who created the folder or document. Use the adjacent arrow icon to change the sort order of the list in this column.

Workflow state	This column sorts the documents in the list in order of their current workflow state. Use the adjacent arrow icon to change the sort order of the list in this column. ***Note:*** *Workflow state is a categorization applied to a document, based on its current position in a predefined workflow cycle.*

You can access the following functionality in Browse Documents:

Note: *The availability of options depends on your permissions, and on the actions allowed in particular workflow states.*

- Work with folders - using the **Folder Actions** menu
  ❑ add documents
  ❑ add folders
  ❑ rename folders
  ❑ view or edit permissions
  ❑ configure workflows (if automatic workflows have been set up by your administrator)
  ❑ perform bulk uploads of files and folders from your local computer
  ❑ allocate roles

- Work with documents - using the **Document Actions** menu
  ❑ view the document details
  ❑ download a document to view it
  ❑ check out a document for editing
  ❑ check in a document
  ❑ cancel a document check out
  ❑ edit document metadata
  ❑ delete a document
  ❑ move a document
  ❑ rename a document
  ❑ view a history of transactions (move, delete, check out etc) performed on a document
  ❑ view a document's version history
  ❑ archive a document
  ❑ view a document workflow
  ❑ view the group and role permissions settings for a document
  ❑ create a discussion thread on a document or add to an existing thread
  ❑ email a document to a group or user in your organization
  ❑ view or create links for a currently selected document, to another document in the repository

  - Search - using simple search, advanced search, or saved searches

  - Browse the repository - by folder, by document type, or by lookup value

  - Subscribe to folders and/or documents, and manage your subscriptions

7.2.1 Working with Folders

You use the **Folder Actions** menu in the Folder View of the **Browse Documents** section to work with folders.

7.2.1.1 Folder Actions

This menu displays the functionality available to you, for the folders listed left of the page in **Browse Documents**.
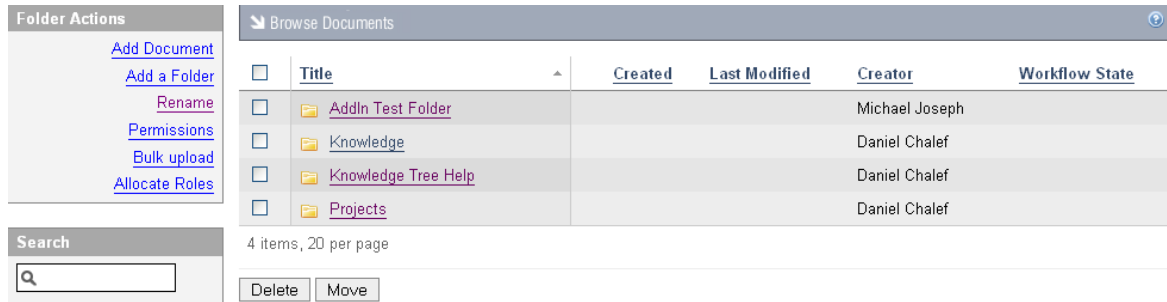

Figure: Folder Actions Menu

Using Folder Actions

The options displayed in this menu are permissions-based. If you do not have permissions to perform one or more of the folder actions, you will not see the option for that action in this menu when you log on to KnowledgeTree:

Action	Result
Add Document	Opens the **Add a document** page, where you can <u>add a document</u> to the currently selected folder.
Add a Folder	Opens the **Add a folder** page, where you can <u>add a folder</u> to the repository.
Rename	Opens the **Rename** page, where you can <u>change the name</u> of the currently selected folder.
Permissions	Opens the **Folder permissions** page, where you can <u>view</u> or <u>edit</u> group permissions.
Bulk Upload	Opens the **Bulk import** page, where you specify a path to an **archive (ZIP) folder** on your local computer that you want to add to the repository.
Allocate Roles	Opens the **Allocate Roles** page, where you can <u>set up or change roles</u>.

Bulk Export	Allows you to download (for viewing only) the entire contents of the currently selected folder, in one zipped file.

7.2.1.1.1 Add Document

This procedure adds a new document to the KnowledgeTree Document Management System repository.

Perform the following steps:
1. Login; then, click **Browse Documents** to enter the folder structure.

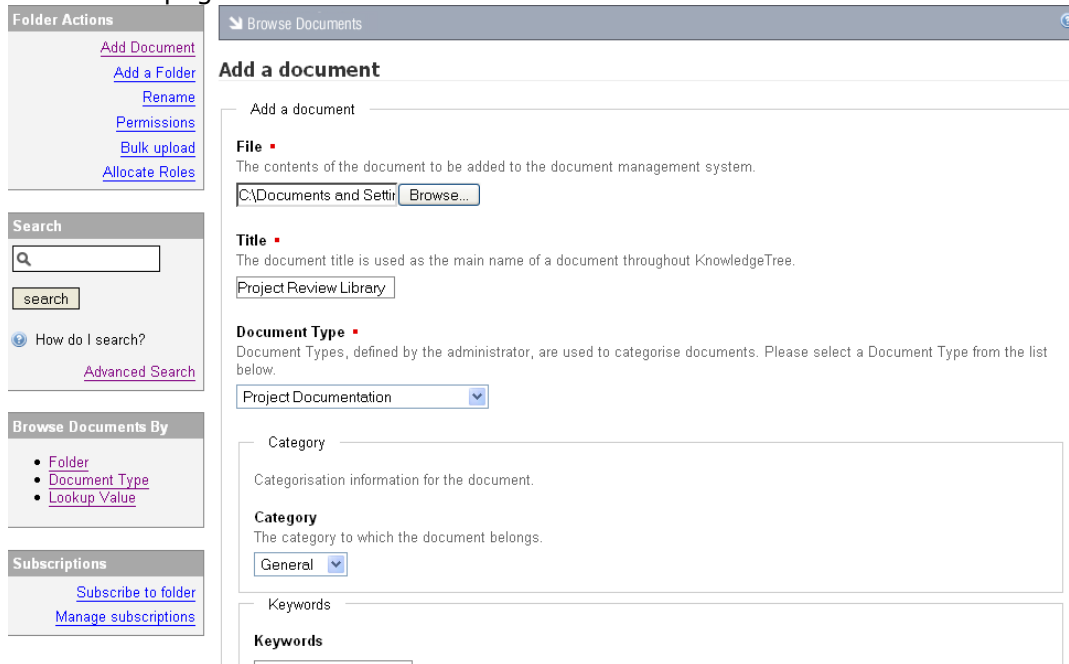2. Click **Add Document** in the **Folder Actions** menu to open the **Add a document** page.

Figure: Add a document page

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

4. Specify the document title in the **Title** field.

5. Click the down arrow for the **Document Type** pick list; then, select an option.

6. Complete the fields for the custom fieldsets defined for this document type - e.g. author, category, keywords etc.
    Note: *Your administrator defines custom fieldsets and fields for document types.*

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

7.2.1.1.2 Add a Folder

This procedure adds a folder to KnowledgeTree's folder hierarchy.

Note: If you belong to a **group** that has been assigned the **Add Folder** permission on a folder, you are allowed to add child folders to that parent folder.

Perform the following steps:
1. Login; then, click **Browse Documents** to enter the folder structure.

2. Navigate to the location where you want to add a folder; then, click **Add a Folder** in the **Folder Actions** menu to open the **Add a folder** page.

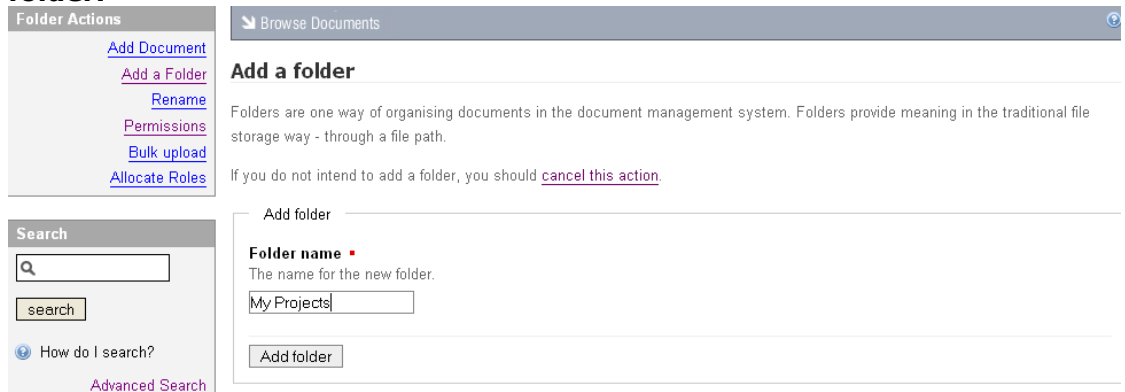3. Define a name for the new folder in the **Folder name** field; then, click **Add folder.**

Figure: Add a folder page

7.2.1.1.3 Rename: Folders

You can rename a folder if you have the required permissions.

Note: The **Folder Actions** menu will only include the **Rename** option if you have permissions to rename the folder.

Perform the following steps:
1. Login; then, click **Browse Documents** to enter the folder structure.

2. Locate the folder that you want to rename; then, click **Rename** in the **Folder Actions** menu to open the **Rename** page in **Browse Documents**.

3. Enter a new name for the folder in the **New folder name** field; then, click **Rename**.
   Result: A system message displays to advise you that the folder name has changed - you will also see the old folder name and the new folder name in this message.

7.2.1.1.4 Permissions: Folders

7.2.1.1.4.1 Viewing Folder Permissions

You view permissions for a folder on the **Folder Permissions** page in **Browse Documents**.

Perform the following steps:
1. Login; then, click **Browse Documents** to enter the folder structure.

2. Locate the folder for which you want to view permissions.

3. Click the **Permissions** link in **Folder Actions** to open the **Folder permissions** page.

4. View Role/Group permissions for the folder.

Figure: View Folder Permissions

7.2.1.1.4.2 Editing Folder Permissions

By default, child folders **inherit permissions** from the parent folder. KnowledgeTree allows you to override the permissions of the parent folder, if you have the required permissions, so that you can define new permissions for the child folder.

For more information about Editing Folder Permissions, see the **KnowledgeTree 3.0 Administrator Manual**.

7.2.1.1.5 Bulk Upload

You use **Bulk Upload** when you need to upload multiple documents to the repository, and you want to use a zipped folder to do this. You need to place the files into a zip archive at the source location before uploading this content to the KnowledgeTree. Bulk upload retains the same directory structure as defined in the zip archive.

Note: Bulk Upload may not be available for your installation. Consult your administrator to find

out more.

Performing a Bulk Upload of content:
1. Login; then, click **Browse Documents** to enter the folder structure.

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

3. Click **Bulk Upload** in the **Folder Action** menu to open the **Bulk Import** page.

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

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

6. Complete the information fields for this document type.
   Note: Your KnowledgeTree administrator may have defined custom fieldsets for this document type, which display once you have selected a document type.

7. Click **Upload**.

7.2.1.1.6 Allocate Roles

Roles are set up or changed on the **Allocate Roles** page in **Browse Documents**.

*Note: The KnowledgeTree administrator is generally tasked with role allocation and with modifying roles. To find out more about allocating or editing roles, see the **KnowledgeTree 3.0 Administrator Manual**.*

Figure: The Allocate Roles page

7.2.1.1.7 Bulk Export

This feature allows you to download the entire contents of a folder in one zipped file. You can save the zipped file to your computer where you can open it to view all the files you downloaded.

Perform the following steps:
1. Login; then, click **Browse Documents** to enter the folder structure.

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

3. Click **Bulk Export** in the **Folder Actions** menu.
   Note: *This menu item won't display if you do not have permissions for this action on the folder.*

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

7.2.2   Working with Documents

You use the **Document Actions** menu in the **Browse Documents** section to work with documents in the KnowledgeTree repository.

Perform the following steps to access the Document Actions menu:
1. Login; then, click **Browse Documents** to enter the folder structure.

2. Use **Search**, or navigate through the folder structure to locate the document you want to work with.

3. Click on the document to open its **Document Detail** page (this page corresponds with the first item in the **Document Actions** menu: **Display Details**).

4. Now you can:
   - View the document details on the right of the page.
   - Select the option for the task you want to perform in the **Document Actions** menu.

7.2.2.1   Document Actions

7.2.2.1.1 Display Details - The Document Detail Page

Display Details in the **Document Actions** menu opens the **Document Detail** page.

The **Document Detail** page - a default view that opens when you click the document link from the folder view - summarizes key information about the currently selected document. It also provides information about the built-in metadata for the document, including the file name, file type, creator, last update date, document type, and the document's workflow status.

Note: *Additional metadata fields may have been added by your KnowledgeTree administrator.*

Figure: Document Detail page

7.2.2.1.2 Dowload

You can **download** a file to open it or to save it to your local computer without checking it out of the repository. When a document is checked out, users and groups with read or write access to the document are allowed to download it for viewing only. Your Web browser may allow you to open the document or to save it to your desktop.

7.2.2.1.3 Check out

This procedure allows you to save a document to your computer for editing.

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

An administrator can override the checked out status of a document. The user who checked the document out to edit it will need to check it out again and redo their changes. The Dashboard displays a list of documents that you have checked out when you log on. This reminds you to check in documents where you may have forgotten to do so.

Perform the following steps:
1. Navigate to the **Document Detail** page of the document you want to check out.

2. Click the **Check out** link in the side menu bar.

3. Enter a comment in the **Reason** field to describe you're checking out the document.
   Note: Reason is a required field.

4. Verify that you're checking out the correct document.
   *Note: To cancel the checkout, click **cancel this checkout**.*

5. Click the **Check out** button below the **Reason** field.
   *Note: Having clicked **Check out**, a system message informs you that automatic download is in progress. If the automatic download does not start, you can initiate download by clicking the link provided.*

Figure: Check out page

7.2.2.1.4 Cancel Check out

You can use the **Cancel Checkout** link in the **Document Actions** menu if you change your mind about checking the document out, or if you don't want to commit the changes you made, and you need to restore the version in the repository prior to check out.

7.2.2.1.5 Check in

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

If you have checked out a document, you need to check it back in to make it available for other users to edit, move, delete, or archive. The system increments the version by 0.1 when a file is checked in to KnowledgeTree.

Perform the following steps:
1. Navigate to the **Document Detail** page of the document you want to check in.

2. Click the **Check in** link on the side menu bar.

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

4. Type a brief comment in the **Description** field to explain the changes you made to the document.

5. Click **Check in** to upload the document.
   *Note: Having checked in the document, the system opens the document's **Document Detail** page.*

7.2.2.1.6 Metadata

Metadata is information about the document, such as the date the document was created, the name of the author, the type of file. KnowledgeTree provides some default **metadata fields**, such as Filename, Last update by, and Created by.

*Note: Your system administrator can create custom fieldsets, which comprise a group of metadata fields containing related information. One or more custom fieldsets are associated with document types, in order to define the information required in documents of that type. For more information about document types, or about metadata fields and fieldsets, speak to your KnowledgeTree administrator or see the **KnowledgeTree 3.0 Administrator Manual**.*

7.2.2.1.6.1 Editing Metadata

This procedure changes a document's metadata.

Perform the following steps:

1. Login; then, locate the document where you need to edit metadata.

2. Click **Edit metadata** in the **Document Actions** menu to open the **Editing** page.

3. **Do you want to change...**
   - **the document type?** Click the **document type** link to open the **Change Document Type** page. Select an alternate document type from the pick list; then, click the **Change Document Type** button.

   - **the document title?** Define a new title for the document in the **Document Title** field.

   - **any custom metadata fields?** Define new information in the text fields for any of the custom fields displayed after the **Generic Document Information** section.

4. When you're done with your changes, click **Save Changes** to re-open the **Document Detail** page, where you can view the changes you made.

Figure: Metadata Editing page - default (generic) fields display at the top of this page, then custom fields

7.2.2.1.7 Deleting Documents and Folders

Deleted documents remain in the repository, and may be restored or expunged (permanently deleted) by an Administrator in the **Document Storage** section of **DMS Administration**.

Note: You need to have the appropriate permissions on a document or folder to delete it.

Perform the following steps:

1. Navigate to the folder or document that you want to delete.

2. **Are you deleting one or more...**

   - **folders?** Select the check box adjacent to title of each folder that you want to delete; then, click **Delete**.

   - **documents?** Select the check box adjacent to the title of each document that you want to delete; then, click **Delete**. Alternatively, click on the document to open the **Document Detail** page; then, click **Delete** in the **Document Actions** menu on the left of the page.

3. Specify the reason you're deleting the file or folder in the **Reason** field on the **Delete Files and Folders** page; then, click **Delete**.

> ***Note:*** *The file or folder is deleted, and this action will be recorded in **Transaction History** for this file or folder in the DMS.*

7.2.2.1.8 Moving Documents and Folders

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

Perform the following steps:

1. Login; then, click **Browse Collections** to enter the folder structure.

2. Search or navigate to the document or folder you want to move.

3. **Are you moving a...**
   - **folder?** Select the check box adjacent to the folder title in the **Browse Documents** table on the right of the page. Do this for each folder that you want to move to the destination location. Click the **Move** button at the bottom of the table to open the **Move** page.

   - **document?** Select the check box adjacent to the document title in the **Browse Documents** table on the right of the page. Do this for each document that you want to move to the destination location; then, click the **Move** button at the bottom of the table. Alternatively, click on the document to open the **Document Detail** page; then, click **Delete** in the **Document Actions** menu.

4. Browse to the location where you want to move this item; then, click **Move**.

5. Enter a comment in the **Reason** field on the **Move Files and Folder** page to describe why you're moving the document or folder; then, click **Move**.
   Note: *The documents and/ or folders you moved display in the **Browse Documents** table in their new location.*

7.2.2.1.9 Rename: Documents

You can rename the file name of a document if you have the write permission.

Note: *This action does not change the document title. It only changes the file name. For example, let's say you have a jpg image file in the repository, and you want to change it into a bitmap. You can rename the file from filename .jpg to filename .bmp; then, you need to check out the .jpg file and check in the bitmap version.*
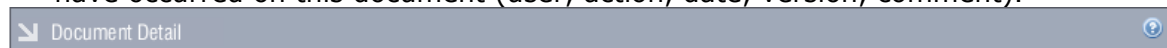
Perform the following steps:

1. Login; then, click **Browse Documents** to enter the folder structure.

2. Locate the document where you want change the file name.

3. Click **Rename** in the **Document Actions** menu to open the **Rename document** page.

4. Enter a new file name for the document in the **New file name** field; then, click **Rename**.

7.2.2.1.10 Transaction History

This feature provides a record of all transactions performed on the document: create date, uploads, downloads, check-out, check-in and the previous deletion of the document if it has been restored.

Perform the following steps:

1. Login; then, click **Browse Documents** to enter the folder structure.

2. Open the **Document Detail** page for the document where you want to view a transaction history.

3. Click **Transaction History** in the **Document Actions** menu to open the **Transaction History** page, where you can view the details of transactions that have occurred on this document (user, action, date, version, comment).

Figure: Transaction History page for a document called 'Project Review Library

7.2.2.1.11 Version History

Version History provides a record of all past and current versions of a document. A new document version is created whenever the actual document in the repository changes (i.e. after check in).

This feature allows you to download older versions of the currently selected document for comparison with more recent versions.

Edits to checked out documents won't display in a document in the repository until the document is checked in after editing. However, any changes to the document metadata are displayed in its version history because metadata editing occurs in the KnowledgeTree system. The document does not have to be checked out to change its metadata.

Perform the following steps:

1. Login; then, click **Browse Documents** to enter the folder structure.

2. Open the **Document Detail** page for the document where you want to access a version history.

3. Click **Version History** in the **Document Actions** menu to open the **Version History** page.
   *Note: The current version of the document is indicated by the bolded text **current version** in the **Compare with Current** column.*

Figure: version History page

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

- **view a version history?** Review the information in the columns and rows on this page.

- **open a version to view it?** Click on a version number in the **Content Version** column to download a read only version.

- **compare the current version with an older version?** Click the **compare with other version** text link in the current version's row to open the **Version Comparison** page, where you can view comparative data.

- **compare an older version of this document to the current version?** Click on the older version's **compare with current** text link, to open the **Version Comparison** page, where you can view comparative data.

- **compare one old version with another old version?** Click on a **compare with other version** text link in the row of an old version you want to compare, to open the **Select Document Version to compare against** page. Click a **compare** text link in the **Compare column** to open the **Version Comparison** page, where you can view comparative data.

↘ Document Detail

Select Document Version to compare against

This page lists versions of document metadata and allows you to compare a metadata version with the current metadata content.

User	Metadata Version	Compare
Carolyn Duangprom	2	compare
Carolyn Duangprom	1	comparing against this version
Carolyn Duangprom	0	compare

7.2.2.1.12 Archive

Archiving makes a document invisible to non-administrative users. Only administrative users are allowed to un-archive a document.

Documents are archived to clear space in the repository in order to speed up search and document viewing.

Note: *Users do not have access to documents in the archive. You can request the administrator to restore the document if you need it.*

Perform the following steps:

1. Login; then, click **Browse Documents** to enter the folder structure.

2. Open the **Document Detail** page for the document you want to archive.

3. Click **Archive** in the **Document Actions** menu to open the **Archive** page.

4. Specify a reason for the archive in the **Reason** field; then, click **Archive**.
   Note: The system re-opens the folder structure view and displays a message to confirm that the document has been archived. The system sends an email to the document creator to advise that the document has been archived (if you have alerts set up on the document for such notifications).

7.2.2.1.13 Workflow

A **workflow** describes the document life-cycle as a predefined series of **states** and **transitions** that the document must pass before work on the document may be considered complete.

Any KnowledgeTree user may be involved in a document workflow. Some documents

(e.g. tenders) may have complex workflows, requiring input from several people within and outside of your organization before the work is complete.

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

KnowledgeTree workflows involve three key areas:
- Assigning workflows
- States and Transitions
- Workflow effects (Actions)

Assigning workflows

A document in the repository can have only one workflow attached to it at any given time. By default, workflows are not automatically attached to new documents when they're added to the repository.

However, the administrator may configure the system to assign workflows when new documents are created, or to assign workflows only to specific documents.

You will only be allowed to select and assign workflows to the documents you're working with – provided you permissions to do so, and assuming that a workflow was not assigned by default when the document was added to the repository.
Note: Once a document is in a workflow, you cannot overwrite that workflow by assigning a different workflow to the document - the document can transition between states in the workflow that has been assigned to it.

States and Transitions

Workflows consist of **states** and **transitions**.

States

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

Transitions

Transitions, which may be defined as the way in which documents move between states, are an essential part of the workflow. Each state can have one or more transitions, depending on how the administrator has created the workflow.

Transitions point to the next step in the workflow, such as **send to client** or **review**, which effectively changes the state of the document. Transitions represent the **actions** that may be performed on a document. For example, an invoice starts in the generated state; then it is sent to client, before it is marked as **billed**.

Transitions are said to be guarded – not all users are allowed to access them. For example, in a **Publication** workflow, only users with the role **Reviewer** may be allowed to review a document, and to move it from **Draft** to **Published**.

Workflow Effects (Actions)

Document workflows are more than just **states** and **transitions**.

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

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

7.2.2.1.13.1 Viewing / Starting Workflows

You are allowed to select and assign workflows to the documents you're working with, if you have the required permissions to do so (Write), and provided the document was not assigned a workflow by default when it was added to the repository.

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

You use the **Workflow** item in the **Document Actions** menu to view the workflow assigned to the currently selected document, or to start a new workflow.
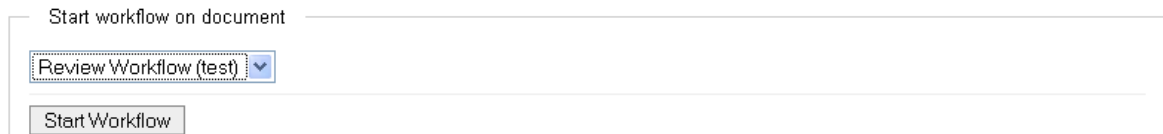
Perform the following steps:
1. Navigate to the **Document Detail** page of the document where you want to view or start a workflow.

2. Click **Workflow** in the **Document Actions** menu.

3. **Does this document already have a workflow assigned?**
   - **Yes.** Clicking the **Workflow** link in **Document Actions** opens the **Current workflow settings** page, where you can view workflow settings, and perform a transition to a new state. Go to step 4.

   - **No.** Clicking the **Workflow** link in **Document Actions** opens the **Document Workflow** page, where you can select a predefined workflow from the menu to start a workflow for this document. Go to step 4.

   - **I don't know?** Click the **Workflow** link in **Document Actions**. If the document has a workflow assigned to it, the system displays the **Current workflow settings** page (see option for *Yes* above). If the document has no workflow assigned to it, you can start a workflow on the **Document Workflow** page that displays. A system message on this page informs you that the document does not have an assigned workflow. (see option for *No* above). Go to step 4.

Document Workflow

Workflow is a description of a document's lifecycle. It is made up of workflow states, which describe where in the lifecycle the document is, and workflow transitions, which describe the next steps within the lifecycle of the document.

No workflow

Document has no assigned workflow.

Start workflow on document

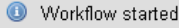Review Workflow (test)

Start Workflow

Figure: Document Workflow page - no workflow assigned

4. **Do you want to...**
- **view the current settings on this document workflow?** Review the settings on the **Current workflow settings** page. Go to step 5.

- **start a workflow?** Select a predefined workflow from the **Start workflow on this document** pick list; then, click **Start Workflow** to open the **Current workflow settings** page where you can view settings on the workflow. Go to step 5.
  Note: You can only start a workflow on a document if you have the required permissions.

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

- **No.** Exit the Workflow section.

Figure: Current workflow settings page - Workflow started

Figure: Transition performed

7.2.2.1.14 Permissions: Documents

You use the **Permissions** link in the **Document Actions** menu of **Browse Documents** to view Role and Group permissions on a currently selected document.

Permissions on a document are inherited from the parent folder, from the workflow (if the document is in a workflow). To add a document to a folder, you need to **write** permissions to the folder. The document you add inherits the folder permissions. On

the other hand, you will need to have **delete** permissions for the folder if you want to delete a document in that folder. You can only set permissions on a document that you add to a folder in the DMS if you have **Manage** permissions on the folder.

7.2.2.1.14.1 View Document Permissions

This procedure displays permissions on the currently selected document.

Perform the following steps:

1. Login; then, open the **Document Detail** page of the document where you want to view permissions.

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

3. View the current Role/Group permissions for the document.

Figure: Document permissions page

7.2.2.1.15 Discussion

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

Perform the following steps to access discussion threads:

1. Login; then, open the **Document Detail** page for the document where you want to view existing discussion threads.

2. Click **Discussion** in the **Document Actions** menu to open the **Discussion** page.

3. View the displayed list of existing threads (if any).

4. **Do you want to:**
   - **add to a thread?** Click the link to the thread in the **Existing threads** section; enter the topic in the **Subject** field; then, enter your comment in the **Body**

field. Click **Post a reply**.

- **close a thread?** Click the link to the thread in the **Existing threads** section; enter a comment in the **Reason** field to explain why you are closing the thread; then, click **Close this thread**.

- **create a new thread?** Enter a topic in the **Subject** field; then, add your comment in the **Body** field. Click **Create a new thread**.

Figure: Discussion - Create a new thread

Figure: Discussion - Existing threads

7.2.2.1.16 Email

KnowledgeTree allows you to send an email from within the system to a KnowledgeTree group or to another user to ask them to view the currently selected document.

The recipient receives a link to the document in the repository. Clicking the link opens the **Document Detail** page of the document in KnowledgeTree.

*Note: Emails can only be sent to users who have email notifications turned on, and who have provided their email address. You switch on email notifications in the **Preferences** tab, or ask your KnowledgeTree Administrator for assistance. The list of recipients that display on the **Email** page are those users for whom email notifications are turned on.*

Perform the following steps to send an email:

1. Login; then, open the document's **Document Detail** page.

2. Click **Email** in the **Document Actions** menu to open the **Email document** page.

3. Select recipients: **do you want to send an email to one or more...**
   - **groups?** Select a group in the **Groups** display menu; then, click the right pointing double arrow on the right of the page to populate the adjacent empty

display field.
*Note: To randomly multi-select, hold down your keyboard **Ctrl** key and select recipients; then click the right pointing double arrow to populate the right side display field.*
Note: To remove a recipient from the right side display field, select the recipient name and click the left pointing double arrow adjacent to the field.

- **users?** Select a user in the **Users** display menu; then, click the right pointing double arrow on the right of the page to populate the adjacent empty display field.
*Note: To randomly multi-select, hold down your keyboard **Ctrl** key and select recipients; then click the right pointing double arrow to populate the right side display field.*
Note: To remove a recipient from the right side display field, select the recipient name and click the left pointing double arrow adjacent to the field.

5. Type a message for the recipients in the **Comment** field; then, click **Email**.

Figure: Email a link to a document

7.2.2.1.17 Links

Document links allow you to establish associations between documents in the repository.

Important:
Your KnowledgeTree administrator needs to create the **Document Link Types** that you use to link documents. When creating a document link, the administrator specifies the type of relationship that the link implies between the linked documents – i.e. 'associated with', or 'duplicated by'. You will not be able to create links if there are no pre-defined link types to choose from.

This procedure allows you to view a link to or from a currently selected document, or to add links.

Perform the following steps:

1. Login; then, open the document's **Document Detail** page.

2. Click **Links** in the **Document Actions** menu to open the **Document Links** page.

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

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

   - **add a new link?** Click **Add a new link** to open the **Add Link** page. Select the target folder.
     Note: *The administrator needs to create link types before you can add links. Ask the administrator for assistance or see the **KnowledgeTree 3.0 Administrator Manual**.*

7.2.3   Search

KnowledgeTree provides three search options – **simple** (quick) search, **advanced** search, and **saved** searches.

Search is permissions-based, so the system only returns items that you are allowed to access.

Note: *Words shorter than 4 characters long (e.g. "the" or "for") are discarded from the search. Search also only ever returns fully matching words (e.g. "Know" will not match "KnowledgeTree").*

7.2.3.1   Performing a Simple Search

This procedure performs a **simple** (quick search) of all text in the repository – including document metadata and the contents of the following common file types: Microsoft Word, Excel, PowerPoint, Adobe PDF, and Plain Text files.

Note: *KnowledgeTree also supports indexing for other file types. Check with your KnowledgeTree administrator to find about more about the files types enabled for your organization.*
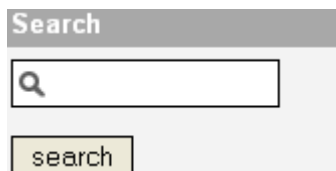

Figure: Simple Search Criteria Field

Perform the following steps:

1. Login to KnowledgeTree.

2. **Do you need to search from...**

- **the Dashboard?** Specify search criteria in the **Search** field on the Dashboard to start your search. See the rest of this procedure for more information about the simple search.

- **Browse Documents?** Click **Browse Documents**; then, specify a search term in the **Search** field. Click **search**.
  Note: *The system returns a list of the documents that contain the search criteria you specified.*

Figure: Results of a Simple Search

7.2.3.2 Performing an Advanced Search

This procedure launches an **advanced**, Boolean search of the repository, which will be based on one or more sets of criteria that you define.

This search allows more detailed search requests using document metadata. For example, you can search for all Microsoft Excel documents containing the word 'Invoice'.

Figure: Boolean Search Page - no criteria defined

Perform the following steps:

1. Login to KnowledgeTree.

2. **Do you need to search from...**

- **the Dashboard?** Click the **Advanced Search** link to open the **Boolean Search** page; then, go to step 3.

- **Browse Documents?** Click **Browse Documents**; then,click **Advanced Search** in the Search menu to open the **Boolean Search** page. Go to step 3.

3. Select **all** or **any** from the **Return items which match...of the criteria groups specified** pick list.

4. Select **all** or **any** from the **Return items which match...of the criteria specified below** pick list, in the **Criteria Group** section.

5. Select a query type from the pre-defined **Criteria** pick list (see the table below); then, click **Add**.
   *Note: The system displays a **Values** field – one or more – for each query type you select in the **Criteria** pick list. You can remove any **Values** field by clicking the **Remove** button adjacent to the field.*

Select	to search...
Name	documents by name.
Title	documents by their title.
Creator	documents created by this user.
Date Created	All files and folders created during the search period you define.
Document Type	All files and folders of this document type – e.g. default, reports, articles, etc.
ID	the document by its numerical identifier.
Date Modified	all files and folders modified during the search period you define.
Document Contents	files or folders containing the search criteria you define, which may be a word or a phrase in the file.
Workflow state	files and folders that have this workflow state.
Transaction Text	comments made during transactions, e.g. workflow transitions, check in reasons, etc.
Searchable Text	all text related to this document.
Custom	You can also search by custom fields set up by your KnowledgeTree Administrator.

6. **Do you want to select another query type for this Criteria Group?**
   - **Yes.** Go back to step 5.

   - **No.** Go to step 7.

7. Complete the **Values** fields for each query type you added to the Criteria Group.

8. **Do you want to define another criteria group for this search?**
   - **Yes.** Click **Add another set of criteria**; then, go back to step 5.

   - **No.** Go to step 9.

9. Click **Search** to start the search.

Boolean Search

Return items which match [any ▾] of the **criteria groups** specified.

Criteria Group

Return items which match [any ▾] of the criteria specified below.

Criteria	Values	
Name	Carolyn	Remove
Title	Styles and Formatting	Remove
Creator	carolyn D ▾	Remove
Date Created	After Date: **2006/02/23 17:52** [select] — Before Date: **2006/02/01 18:29** [select]	Remove
Document Type	Default ▾	Remove
ID		Remove
Date Modified	After Date: **2006/02/23 18:30** [select] — Before Date: **2006/02/01 18:30** [select]	Remove
Document Contents	styles	Remove
Workflow state	None ▾	Remove
Transaction Text		Remove
Searchable Text	fonts	Remove
Category	documentation	Remove

Figure: Boolean Search Page - with criteria defined and Values fields displayed

7.2.3.3   Viewing Saved Searches

The **saved search** function allows KnowledgeTree administrators to pre-save useful advanced searches. For example, the administrator may want to save a search that displays all documents in a completed state of a workflow. Saved searches save time on commonly used searches.

Perform the following steps:

1. Login; then, click **Browse Documents**.

2. View the list of links for saved searches in the **Search** section.
   Note: *Your KnowledgeTree administrator creates this list of saved searches.*
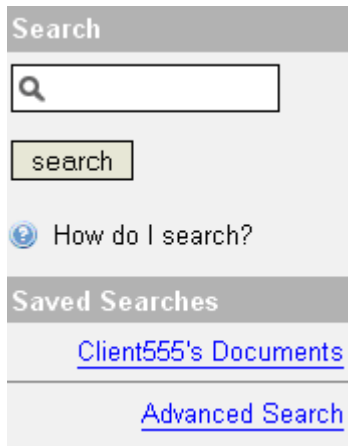
3. Click on a link to run the search.
   Note: The system uses the search criteria saved for the search to find and return relevant content in the repository.

7.2.4   Navigating the Repository: Browse Documents By...

You use the **Browse Documents** section to navigate the repository – either by **folder**, by **document type**, or by **lookup value** – the default is *browse by folder*.

Note: The system only returns folders where you have read and/or write permissions.

7.2.4.1   Browsing by Folder

This procedure provides a folder view of the repository.

Perform the following steps:

1. Login; then, click the **Browse Documents** tab to open the folder view.
   Note: Folder view is the default view.

2. Click on a folder in the list to display it's contents.

Figure: Folder Browse View of the Repository

7.2.4.2   Browsing by Document Type

Perform the following steps:

1. Login; then, click **Browse Documents** to open the default folder view of the repository.

2. Click **Document Type** in the **Browse Documents By** menu to open the **Select a document type** page.

3. Select a document type from the list to open a list of the documents in the repository that match this criteria.
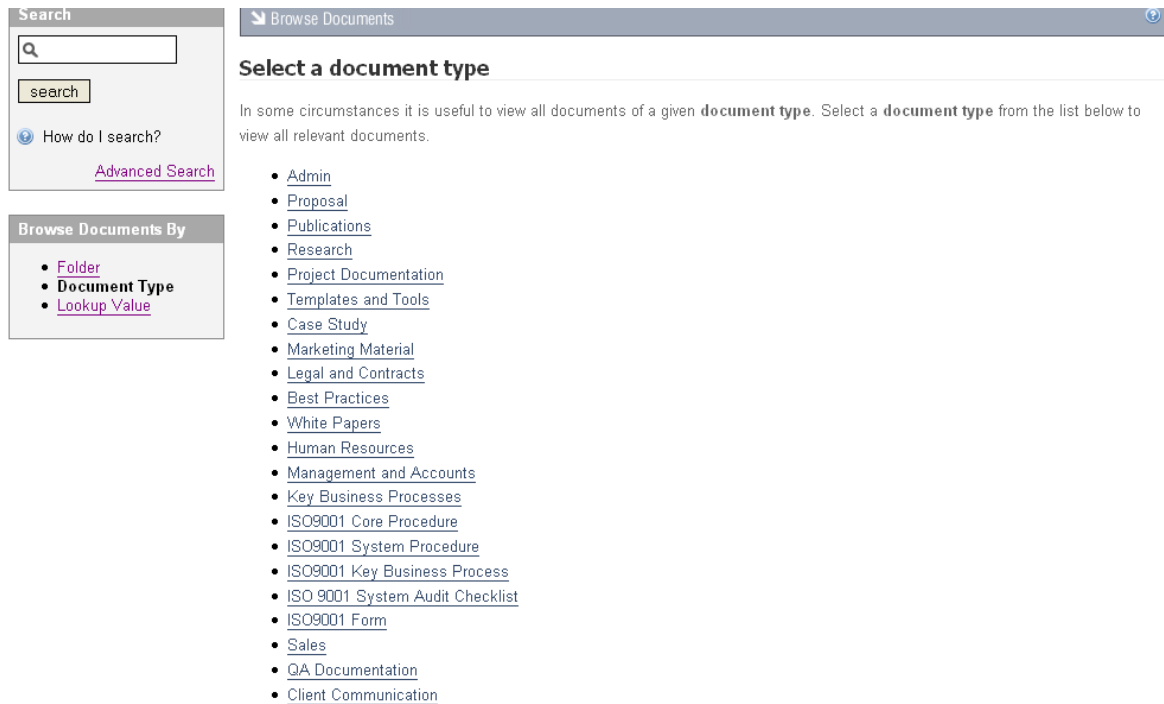

Figure: Document Type Browse View

7.2.4.3   Browsing by Lookup Value

This procedure browses the repository by lookup values.

Note: Lookup values are defined by your KnowledgeTree administrator.

Perform the following steps:

1. Login; then, click **Browse Documents** to open the default folder view of the repository.

2. Click **Lookup Value** in **Browse Documents By** to open the **Select a Field** page.

3. Select an option from list provided on the **Select a Field** page to open the **Select a Value** page where you can further define browse criteria.
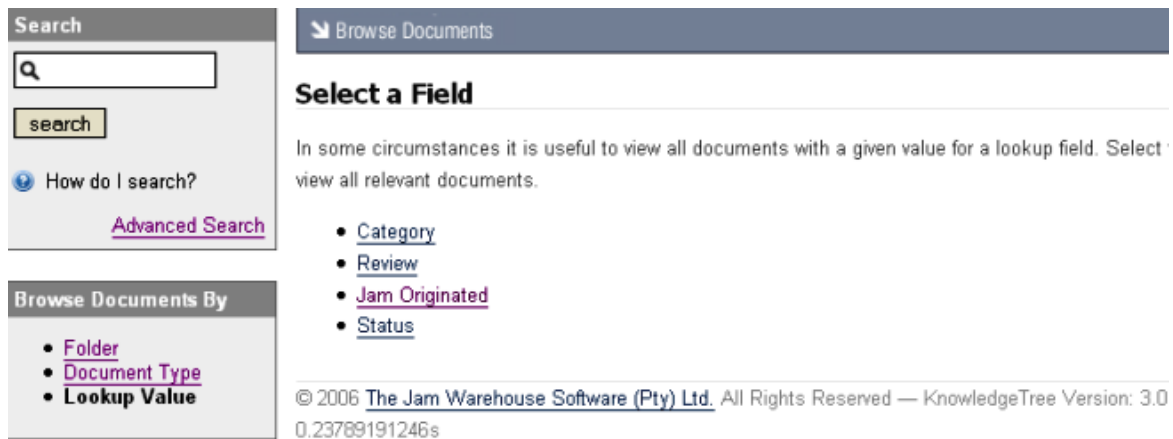
Figure: Browse by Lookup Value - Select a Field page

4. Select an option from the list provided on the **Select a Value** page to open a view of the repository by **Lookup Value**
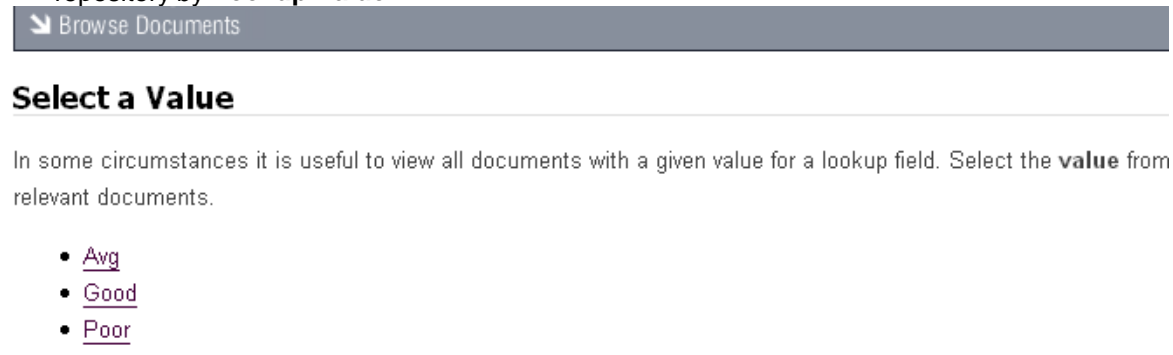

Figure: Browse by Lookup Value - Select a Value page

7.2.5   Subscriptions

Subscribing to a document or folder allows notifications to be sent to you via email (if you have this feature activated on your system), when actions are performed on a document or folder that you have subscribed to - i.e. you will be notified when a document or folder is checked in, checked out, deleted, moved, archived etc.

Your notifications also display on the Dashboard. Unsubscribing prevents further notifications from being sent to you when further actions are performed on the document or folder.

7.2.5.1   Viewing Subscriptions

This procedure displays your current subscriptions.

Perform the following steps:
1. Login; then, click **Browse Documents** to enter the folder structure.

2. Click **Manage subscriptions** to open the **Subscriptions** page.

3. View the list of files and folders to which you are currently subscribed.

7.2.5.2 Subscribing to Documents or Folders

This procedure creates a subscription to a currently selected folder or document.

Perform the following steps:
1. Login; then, click **Browse Documents** to enter the folder structure.

2. Search or navigate to the document or folder where you want to create the subscription.

3. **Is this a...**

- **folder subscription?** Click **Subscribe to folder** in the **Subscriptions** section at the bottom left of the page.

- **document subscription?** Click on the document title to open the **Document Detail** page; then, click **Subscribe to document** in the **Subscriptions** section at the bottom left of the page.

4. View the system message above the table to confirm that you are now subscribed to the document or folder.

7.2.5.3 Unsubscribing from Documents or Folders

This procedure removes an existing subscription from a folder or a document.

Perform the following steps:
1. Login; then, click **Browse Documents** to enter the folder structure.

2. Search or navigate to the document or folder where you want to remove the subscription.

3. **Is this a...**
- **folder subscription?** Click **Unsubscribe from folder** in the **Subscriptions** section at the bottom left of the page.

- **document subscription?** Click on the document title to open the **Document Detail** page; then, click **Unsubscribe from document** in the **Subscriptions** section at the bottom left of the page.

4. View the system message above the table to confirm that your subscription has been removed.
*Note: You can also use the **Manage subscriptions** button to view a list of your current subscriptions, and then select the files and folders where you want to unsubscribe.*

7.3 Preferences

7.3.1 Defining Preferences

This tabbed page allows you to view, define, or modify your personal details.

*Note: Click the **Update your details** button to save any changes you make on this page.*

You can specify the following information:
- **name** - this information is used for reports and listings

- **email address** - this is the address used to send alerts and notifications

- **email notifications** - this check box defines whether or not you should receive email notifications at the email address specified in the previous field. If this option is not selected you will only see notifications on the Dashboard.

- **mobile number** - this number is used to send notifications to your mobile phone, if this service has been configured on the system for your organization

7.4 Logout

7.4.1 Logging out

You use the toolbar **Logout** button to exit the system.

Your working session is set to time out automatically after a pre-defined period of inactivity. You will need to log in again to continue working, and in this case the system re-opens at the page where your session timed out.

On the other hand, if you exit the session using the toolbar **Logout** button, the system opens at the **Dashboard** for your next session.