Administrator Manual

KnowledgeTree®

KnowledgeTree 3.7 Administrator Manual

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Part 1

KnowledgeTree Overview

1 KnowledgeTree Overview

1.1 About this Help

The **KnowledgeTree Administrator Manual** describes the features and functionality available in the KnowledgeTree document management system. It provides instructions intended for use by administrators of your system.

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

This version:
KnowledgeTree Commercial server: version 3.7

1.2 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. Thus, each user you add to KnowledgeTree must be added to a Group and/or to a Role, before the user may 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.

Groups may also contain sub-groups.

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 single users to different groups. 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 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* ***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.

Example

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.

1.3 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 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.

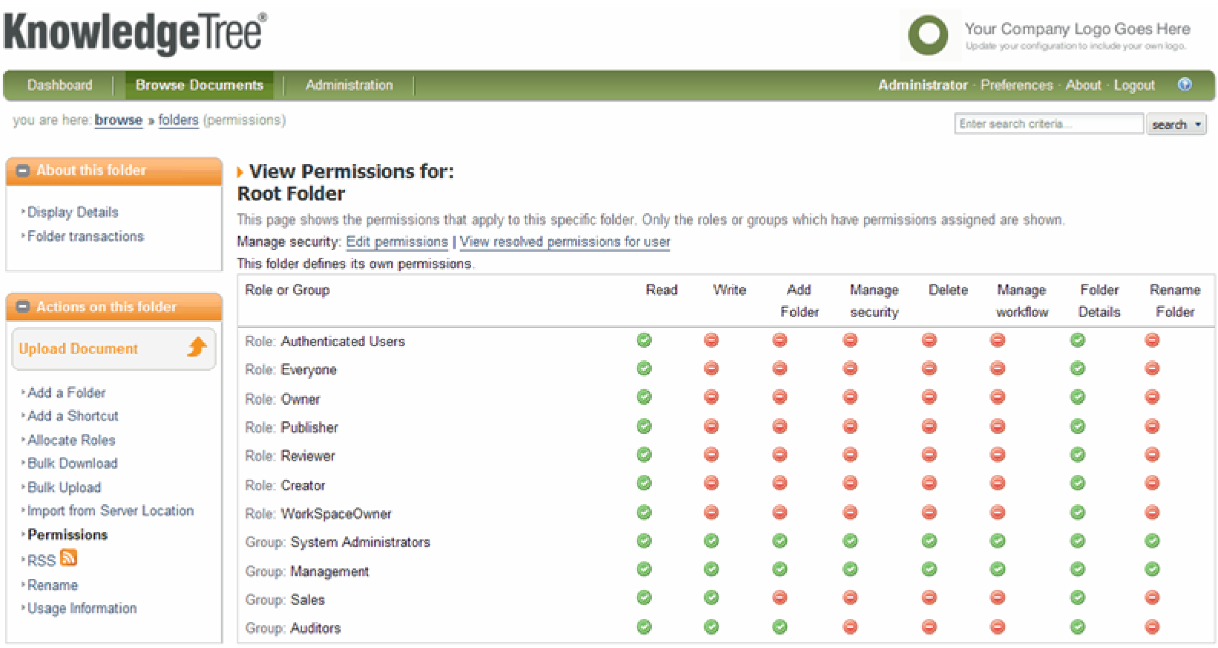


Figure: Viewing permissions on the root folder

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 also: Viewing / Editing Folder Permissions, Organizing Users into Groups, Roles, and Units, Organizing Documents ..., 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 also: Organizing Users into Groups, Roles, and Units, 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

1.4.1 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.*

1.5 Metadata

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 **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.

1.5.1 The Metadata Structure and the Folder Structure

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 folder and file structure, and a 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 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.

1.5.2 Storing Metadata

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

1.5.3 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.

1.5.4 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'.

1.6 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?

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. 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.*

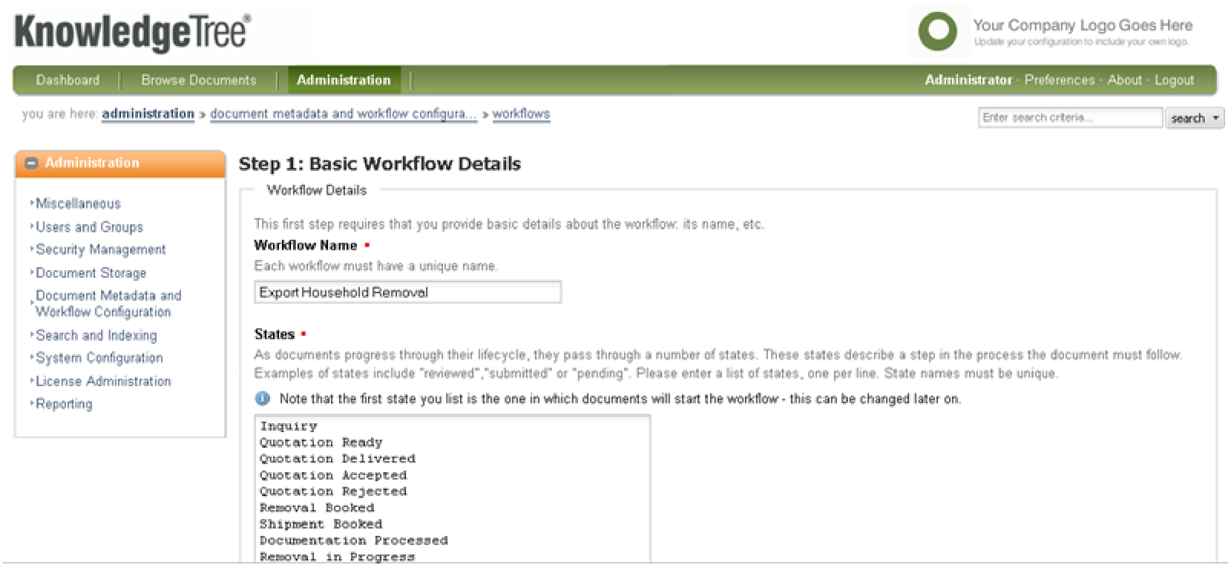


Figure: The Workflow configuration interface

1.7 GUIDs and Indexing

KnowledgeTree Commercial includes a GUID (Globally Unique Identifier) plugin.

Note: *This plugin is not available in KnowledgeTreeLive.*

Warning!
This plugin is *disabled* by default, and is experimental. We recommend that you do *not* turn on.

The plugin writes a GUID to each document to provide information about the document to the KnowledgeTree Office Add-in. The GUID inserts a unique ID (a combination of the content version ID and the document ID) inside the metadata layer in Microsoft Office documents. KnowledgeTree Office Add-in retrieves the GUID from the KnowledgeTree server to automatically detect the correct version of the document.

The GUID creates a copy of the current content version, which may be restored by the KnowledgeTree administrator, working in Administrator Mode, from the document's Version History page.

Note: *Configure the GUID inserter through KnowledgeTree's web interface, in Administration - System Configuration - General Settings. The GUID Inserter setting on this page defines whether to backup the latest content version before inserting the GUID.*

Part 2

Getting Started

2 Getting Started

This topic lists the tasks that are typically performed after installing KnowledgeTree.

Note: *This task list assumes you have successfully installed KnowledgeTree. See the KnowledgeTree Installation and Upgrade Guide for information on installing and upgrading KnowledgeTree.*

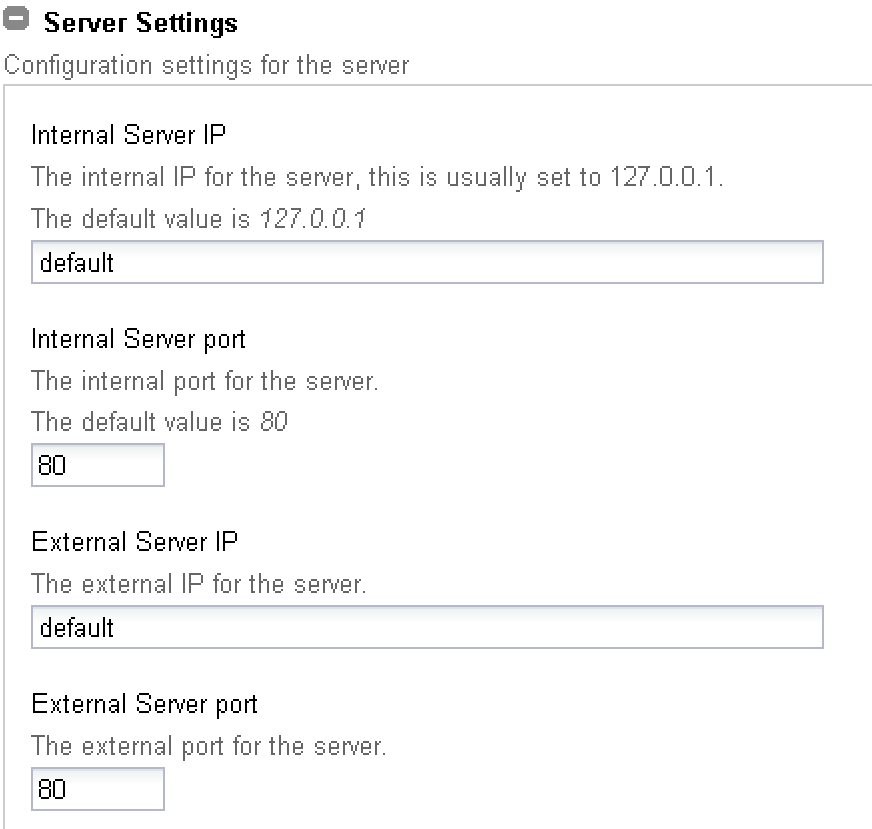
Note: *KnowledgeTreeLive account holders do not need to install or upgrade KnowledgeTree, and no server infrastructure, server configuration or license installation is required to start using KnowledgeTree. A KnowledgeTreeLive account provides you with on-demand access to the latest version of KnowledgeTree Commercial. For more information about the KnowledgeTreeLive service, see the KnowledgeTreeLive Quick Start Guide.*

Perform the following tasks:

1. Change the default administrator password.

2. If you have installed KnowledgeTree Commercial, install your license (Trial or Subscription) to activate KnowledgeTree's commercial features.
   Note: *This task is not applicable for KnowledgeTreeLive.*

3. Check that Indexing is working - to do this, view the **Document Indexer Statistics** in **Administration - Search and Indexing**. If you discover through this section that indexing is not working, you can troubleshoot the indexer by checking the Indexing-related reports and statistics in **Administration - Search and Indexing**.
   Note: *To start indexing, the Document Indexer retrieves the internal server URL from the database - this value displays and is editable in* ***Administration - System Configuration - General Settings****.*
   If indexing does not start, or stops working, you can also check the value set for the internal server URL in General Settings.



4. Enable emailing on the KnowledgeTree server, if this is not yet set up.
   Note: *This task is not applicable for KnowledgeTreeLive as email is pre-configured for KnowledgeTreeLive accounts.*

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.
   Note: *This task is not applicable for KnowledgeTreeLive.*

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 and Upgrade Guide)
     Note: *See the KnowledgeTree Installation and Upgrade Guide for more information.*

   - 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
     Note: *See the KnowledgeTree Client Tools Guide for information on installing and using KnowledgeTree Hot Folders.*
     Commercial Editions Only

- use the KnowledgeTree Drop Box to drag and drop folders and documents into KnowledgeTree.
  Note: *See the KnowledgeTree Client Tools Guide for information on installing and using KnowledgeTree Drop Box.*

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
    - assign folder permissions

2.1 Starting KnowledgeTree

To start KnowledgeTree services see the Setup Wizard Guide.

Note: *This topic is not applicable to KnowledgeTreeLive, which is always accessed via a web browser.*

2.2 Logging On

This procedure logs the administrative user on to KnowledgeTree through the web interface.

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.*
Note: *These pre-requisites for logon are not applicable to KnowledgeTreeLive, which is the hosted, SaaS version of KnowledgeTree Commercial on-premise.*

Perform the following steps:

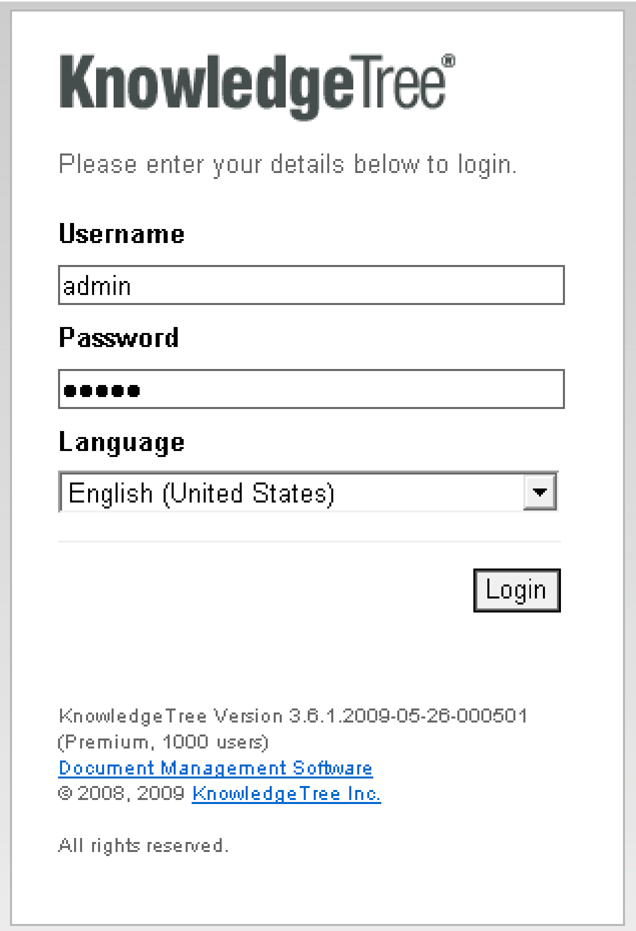
1. Use your web browser to navigate to the location (URL) of your KnowledgeTree server. The KnowledgeTree Login page displays.

2. Enter your administrative login details in the **Username** and **Password** fields.
   Note: *First time users, use the default admin credentials:*
   - *username: admin*
   - *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. Choose a language for the interface, if alternative languages are available for your installation. The default is English (US).

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



2.3 Logging Off

To log off from KnowledgeTree through the web interface, click the ***Logout*** button on the toolbar.

2.4 Using Search

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

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

Note: *The search procedures documented in this Manual are used for searches in KnowledgeTree's web interface. For information on searches performed through the KnowledgeTree client tools, see the KnowledgeTree Client Tools User Guide.*

KnowledgeTree search allows you to ...

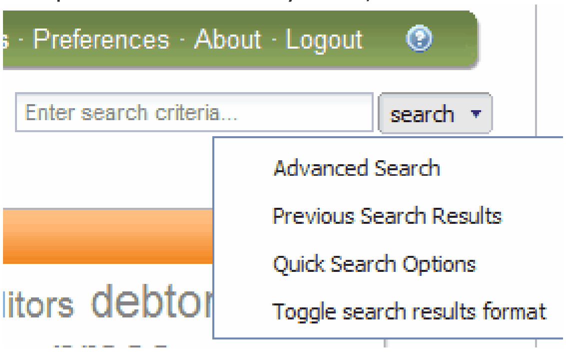
- run a quick (simple) search on content and metadata, or on metadata only
- set up advanced searches, comprising one or more sets of criteria that you can configure through a user-friendly advanced search configuration page
- set up your own complex and detailed search expressions, using an onscreen search criteria editor and KnowledgeTree's search grammar
- view the results of your most recent search
- save your searches for later re-use
- edit, delete, or share your saved searches with other system users
- define how your search results display by toggling the search results view on the search drop down menu

Notes on search results:

- *Includes documents and folders, and any shortcuts to documents and folders that match specified search criteria*
- *Excludes words containing less 4 characters, e.g. 'the', 'for'*
- *Results are permissions-based, and require at least the 'read' permission on returned items*
- *Relies on data extracted during indexing*
- *Excludes archived and/or deleted documents by default. To add this content, define the search criteria accordingly (isdeleted, and isarchived)*

The Search Portlet

Access to search is provided through KnowledgeTree's web interface **search** portlet, located at the top right of the page in all sections of the web interface. The search portlet comprises a text entry field, a search button, and a drop down search 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, FullPath, GeneralText, IntegrationId, IsArchived, IsCheckedOut, IsDeleted, 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.

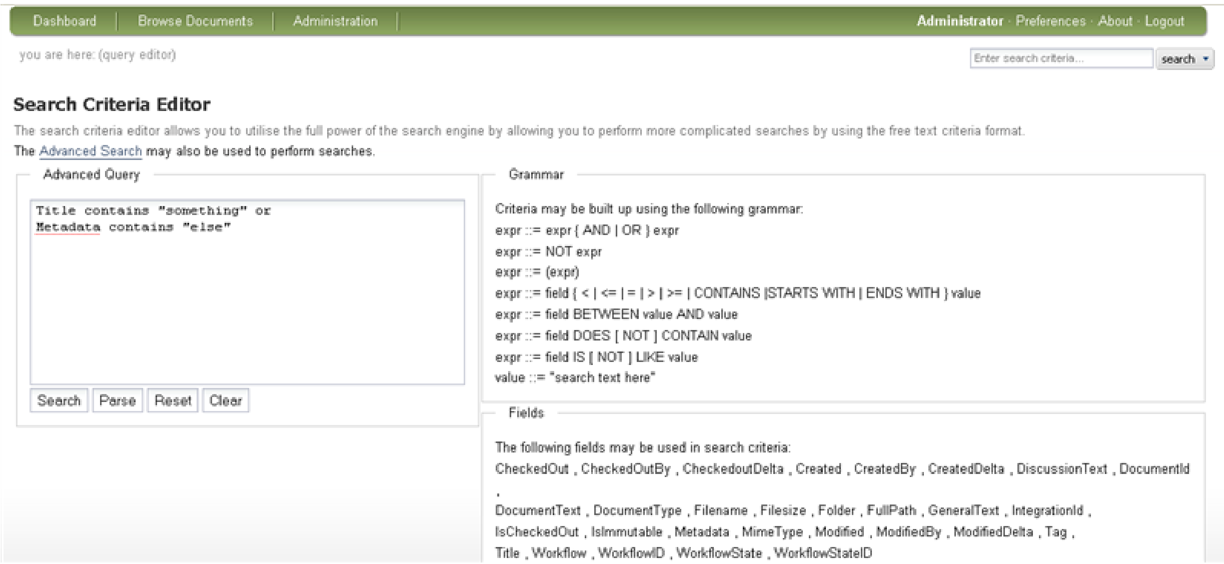
How to manage existing saved searches

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*

2.4.1 Advanced Search Queries

KnowledgeTree's Web interface **Search Query Builder** 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
- FullPath
- GeneralText
- IntegrationId
- IsArchived
- IsCheckedOut
- IsDeleted
- 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"

2.5 Changing the Default Admin Password

This procedure changes the default administrator password.

What is the Default Administrator Password

When installing KnowledgeTree, a default administrator profile is created to allow initial access to the system. 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.

The default admin login credentials are:
Username: admin
Password: admin

For security purposes, please change the admin password as soon as possible. Note that you will only create a new admin password. The administrator's login username remains 'admin'. If you forget your new system password, you may also restore the default admin password.

Perform the following steps:

1. Use the default administrator credentials to log in to KnowledgeTree's web interface.
   Note: *The default credentials are 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***.
   Note: *When logging in with your new password, you will use the default administrator*

login username 'admin', and your new password, e.g:
- *username: admin*
- *password: [new password]*

2.6 Restoring the Default Admin Password

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

Note: *If the* ***Password Reset*** *plugin is enabled for your system, you can click the 'Forgot your password?' link on KnowledgeTree's web interface Login screen to reset your password. You will only see this link if the plugin is enabled. Alternatively, use this manual procedure to reset your password.*

Note: *This task is not relevant for KnowledgeTreeLive - use the*

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**

2.7 Miscellaneous Configuration Tasks

2.7.1 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.*

Note: *The 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

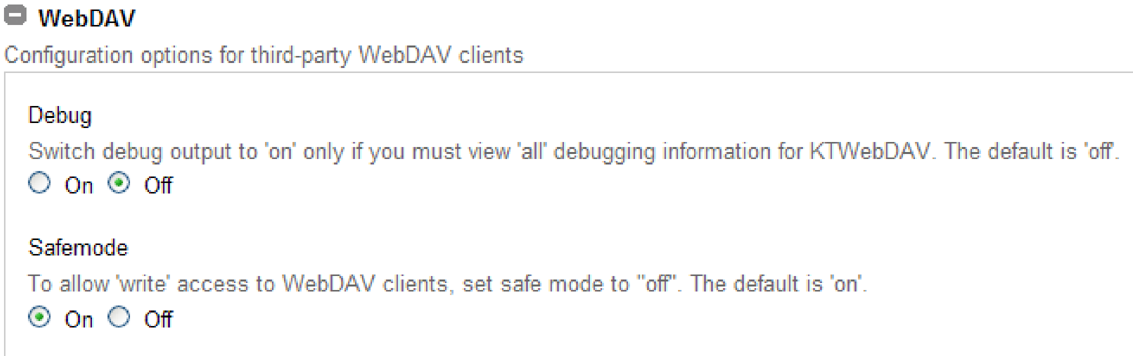
   Notes:
   - *On some clients you may need to replace http:// or, https:// with webdav:// or webdavs://*
   - *KnowledgeTree Commercial: use /baobab.php*
   - *KnowledgeTree Community Edition: use /ktwebdav.php*
   - *Authentication under Windows XP requires that you append the port to the hostname*

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

2. (Optional) To allow write access to WebDAV clients, set safemode to 'off'. To do this

   2.1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **Administration - System Configuration - Client Tools**.

   2.2. On the **Client Tools Settings** page, locate the **WebDAV** configuration settings.



   2.3. Set the **Safemode** setting to *Off*.

See Also

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

2.7.2 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: *This topic is not relevant for KnowledgeTreeLive, the hosted version of KnowledgeTree Commercial on-premise.*

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.

   Note: *See the KnowledgeTree Installation and Upgrade Guide for more information on installing and upgrading KnowledgeTree.*

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.

2.7.3 Configuring SSL for the Apache Server

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

Note: *This topic is not relevant for KnowledgeTreeLive, the hosted version of KnowledgeTree Commercial on-premise.*

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/**)

2.7.4 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

2.7.5 Adding a Custom Logo to the Login Page

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

Note: *This topic is not relevant for KnowledgeTreeLive, the hosted version of KnowledgeTree Commercial on-premise.*

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.

See Also:
User Interface Settings

Part 3

Setting Up and Managing KnowledgeTree

3 Setting Up and 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.

Note: *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.*

- **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.

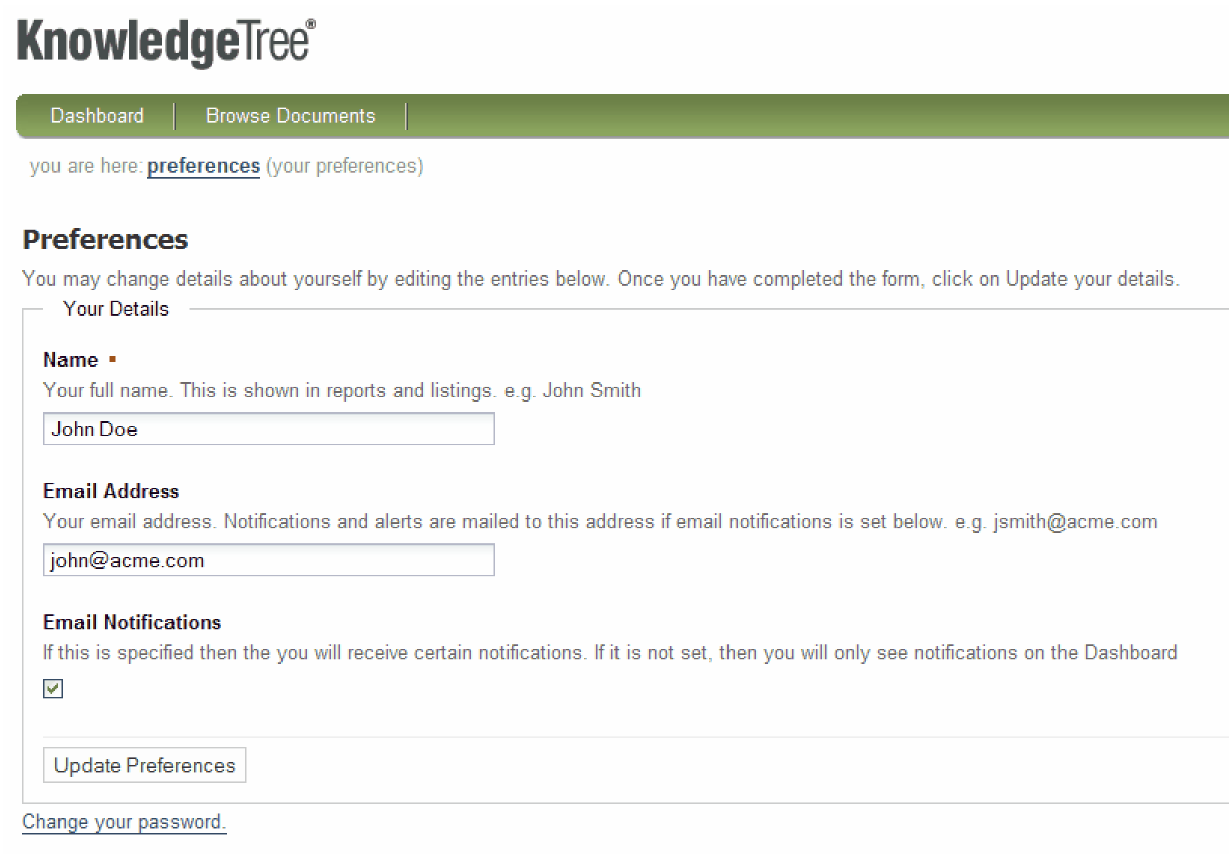
- **Browse Documents**
  The **Browse Documents** module contains your organization's content repository and provides access to the folder structure, and to document and folder actions. Any logged in user sees only those files and folders where they have at least appropriate 'read' permissions. The default 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****.*

- **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.

  Note: *Some settings in this module are not relevant for KnowledgeTreeLive, the hosted version of KnowledgeTree Commercial on-premise. See the [KnowledgeTree Wiki] for details.*

- **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****.*

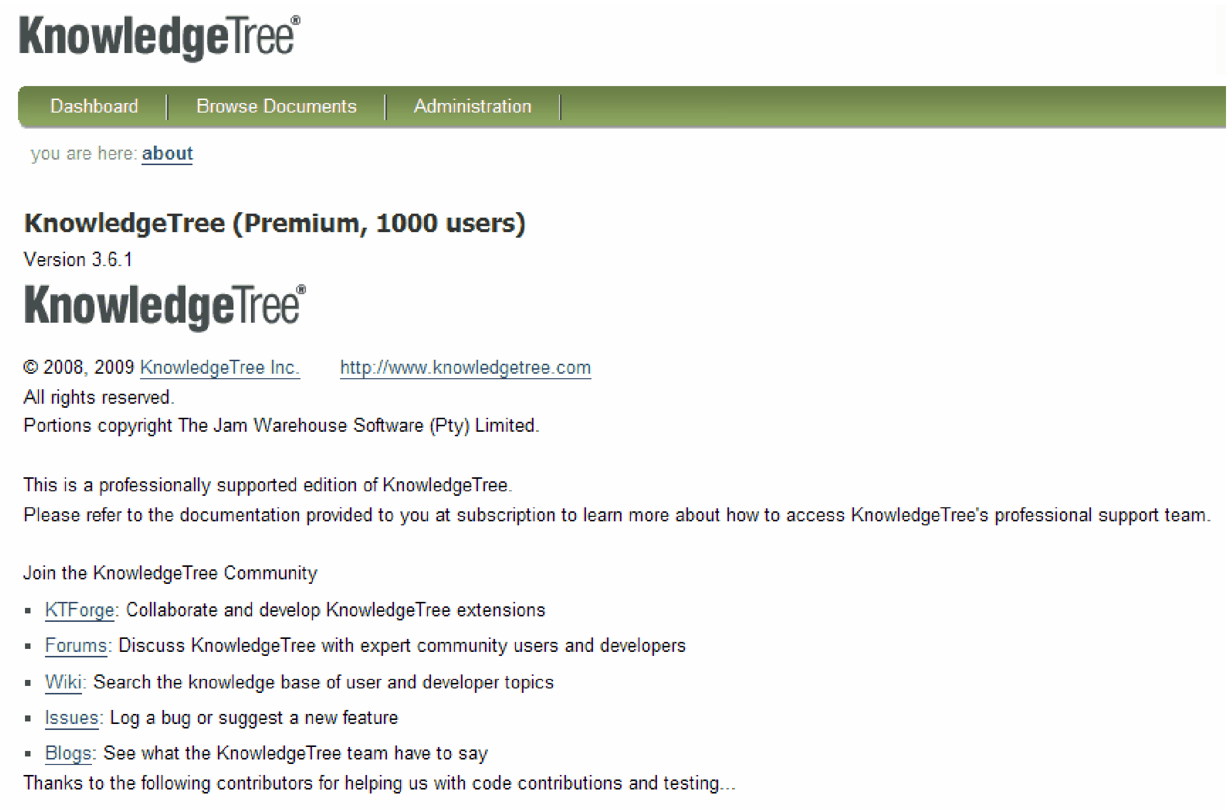


Preferences

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.

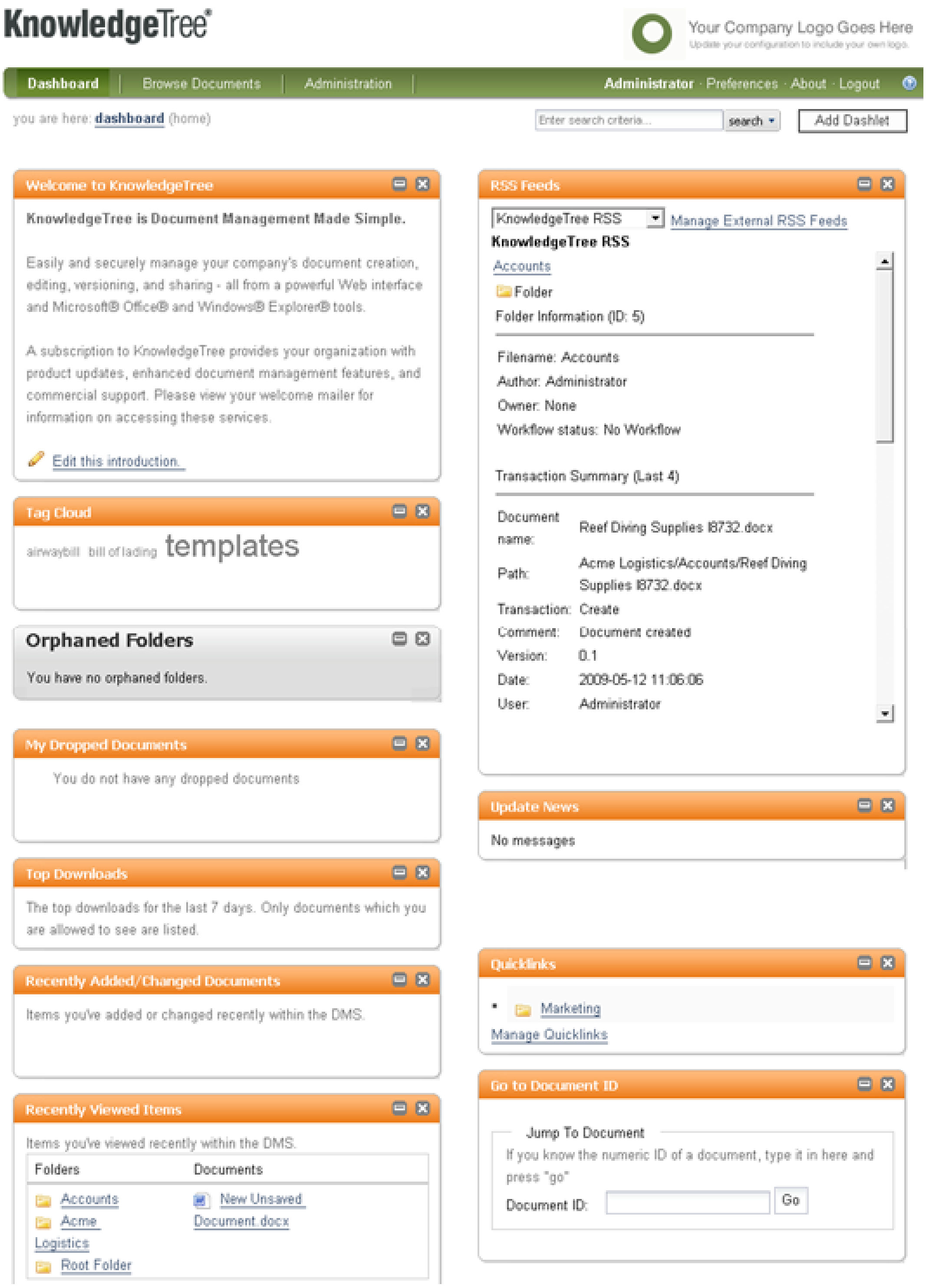
Note: *Some information in this module may not be relevant for KnowledgeTreeLive. See the [KnowledgeTree Wiki]() for details.*



About KnowledgeTree

3.1 The KnowledgeTree Dashboard

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



Notes:

- *KnowledgeTree Commercial dashlets display after you have installed your KnowledgeTree*

Commercial on-premise license (Trial or Subscription). KnowledgeTreeLive account holders do not need to install a license.

- *You must enable the Document Jump plugin to allow users to move the Web interface dashlets to custom positions.*
- *KnowledgeTree uses the currently logged in user's credentials to determine the information that displays on the Dashboard. For example, some dashlets are only visible to the administrator, providing information on system specific tasks, resources, and statistics.*

Dashlets

- **Welcome ...** - an editable welcome message.
- **Your Checked-out Documents** - a list of documents checked out by the currently logged on user, and a reminder to check these documents back in to the system to make them available to other users for editing. **Commercial Editions Only**
  Note: *This dashlet displays only when you have documents checked out. To permanently display this dashlet, change the following setting to 'True' in* ***System Configuration - General Settings - Dashboard****; then, click* ***Save Config Settings****.*
- **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**
- **Top Downloads** - displays a permissions-based list of the seven most downloaded documents in your organizational DMS. **Commercial Editions Only**
- **License** - displays only when you have installed KnowledgeTree Commercial, and you either have no license installed, or your license has expired. **Commercial Editions Only**
  Note: *Not applicable for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise.*
- **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.
  Note: *Not applicable for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise.*
- **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.
Note: *Some settings may not be applicable for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

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

- **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.
Note: *Some settings may not be applicable for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

- **My Dropped Documents** - displays documents uploaded through KnowledgeTree Drop Box.

⊟ Indexing Dashlets moved to Administration in KnowledgeTree 3.6.1
Note: *From KnowledgeTree 3.6.1, Indexing related reports, statistics, and actions that were provided through the following dashlets are now accessed in **Administration - Search and Indexing**:*

- ***Document Indexer Statistics*** *- this dashlet provided information on the status of document indexing; a diagnostic function to check that the correct version of documents are indexed, to re-schedule indexing if necessary, to view the number of documents indexed and the number of documents still in the indexing queue, and to see whether there was any error with the Indexer. From KnowledgeTree 3.6.1, access this information in **Administration - Search and Indexing - Document Indexer Statistics**.*

- ***Text Extractor Diagnostics*** *- this dashlet displayed only when it detected an error with the Indexer and the Text Extractors. From KnowledgeTree 3.6.1, access this information in **Administration - Search and Indexing - Document Indexer and External Resource Dependency Status**.*

- ***External Resource Dependency Status*** *- this dashlet displayed a report when errors were detected with KnowledgeTree's external resources (Document Indexer and OpenOffice). From KnowledgeTree 3.6.1, access this information in **Administration - Search and Indexing - Document Indexer and External Resource Dependency Status**.*

- ***Document Indexer Status*** *- this dashlet provided information on the Document Indexing Service. From KnowledgeTree 3.6.1, access this information in **Administration - Search and Indexing - Document Indexer and External Resource Dependency Status**.*

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.

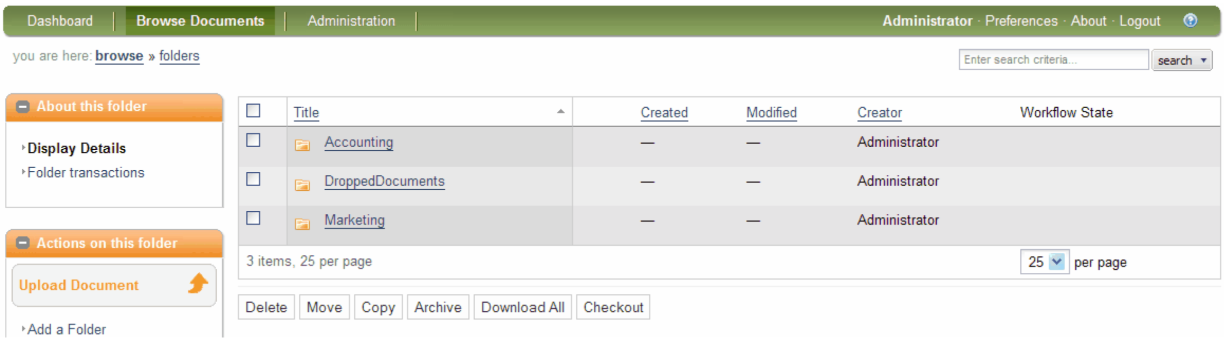
   - **customize text?** Click ***Edit this introduction*** to open the Help editing screen. Make the required changes; then, click ***Update***.
     Note: *The customized page is added to the **Current help assignments** page, and the new text is updated in the **Welcome ...** dashlet on the Dashboard.*

   - **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.

3.2 Browse Documents

This chapter provides information on the administrative tasks that may be performed in **Browse Documents**:
Note: *Most administrative tasks are performed in Administration. For user-level information about working in Browse Documents, see the KnowledgeTree User Manual.*



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

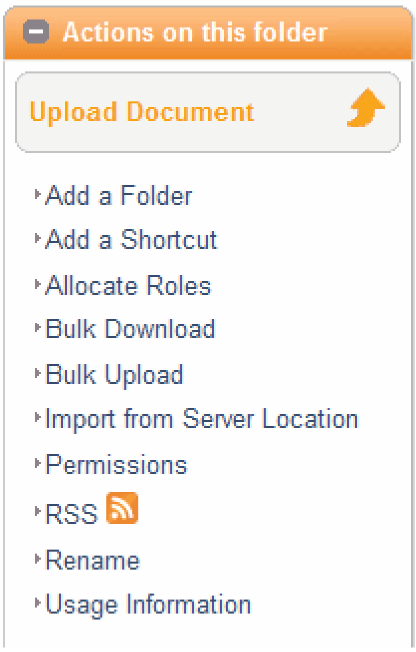
- **Import from Server Location** - uploads all content from a defined server location to the currently selected folder in the repository. You may define the following metadata information on this content during the import action: document type (and add values for each field associated with the selected 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.

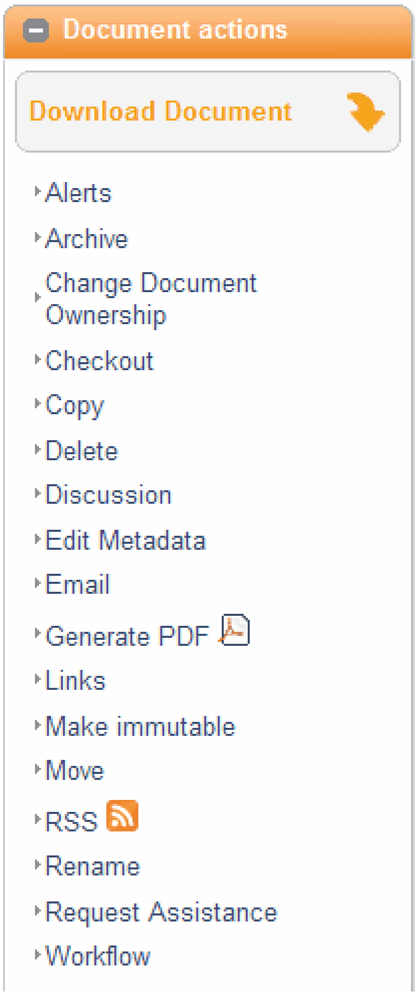


The Document Actions Menu

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**.



3.2.1 Viewing Folder Contents

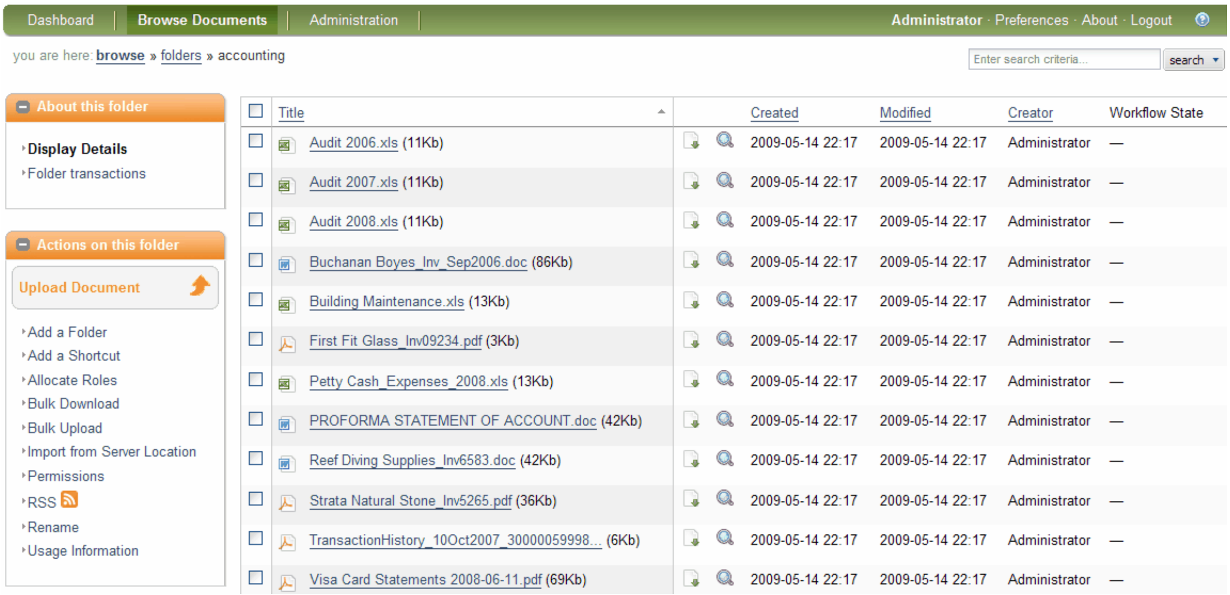
This procedure displays the contents of a folder and folder details, and provides access to actions on the folder.

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
   - You can select one or more check boxes adjacent to documents and folders; then, Delete, Move, Copy, Archive, Download All, and Checkout
   - Allowable actions on the selected folder display in the **Folder Actions** menu
   - Document actions available on icons in the folder view: Download Document, Property Preview

Note: *The KnowledgeTreeLive version of KnowledgeTree Commercial on-premise edition also includes*
Zoho integration on supported document types, which allows you to view and edit Microsoft Office documents online and on the fly within the Zoho Writer interface - the selected document is checked out
of KnowledgeTree for editing and your changes are saved back to KnowledgeTree when you're done.



View folders in Browse Documents

3.2.2 Viewing Folder Transactions

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

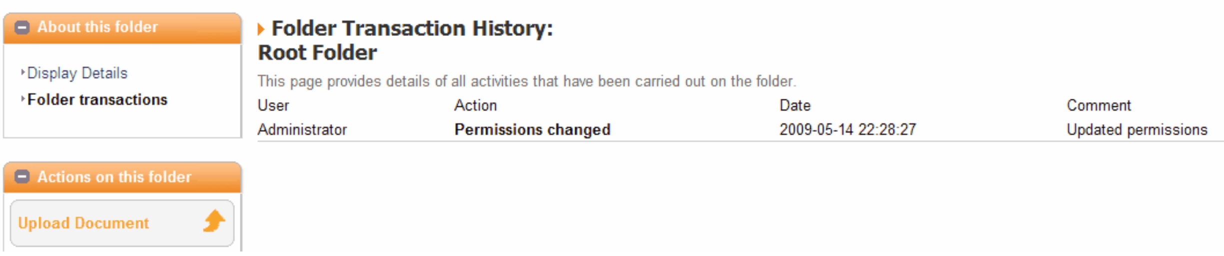
Perform the following steps:

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



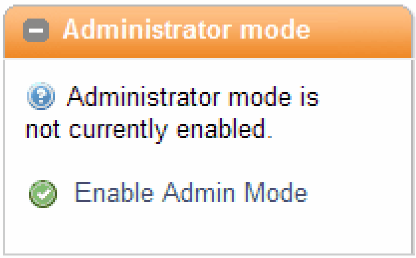
3.2.3 Administrator Mode

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.*



3.2.4 Enabling and Disabling Administrator Mode

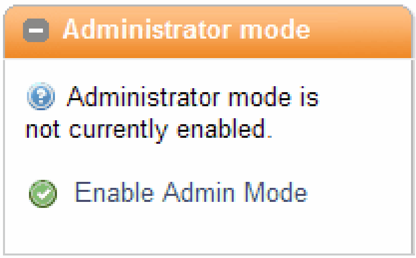
This procedure enables and disables administrator mode in KnowledgeTree's web interface.

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***.



3.2.5 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.*

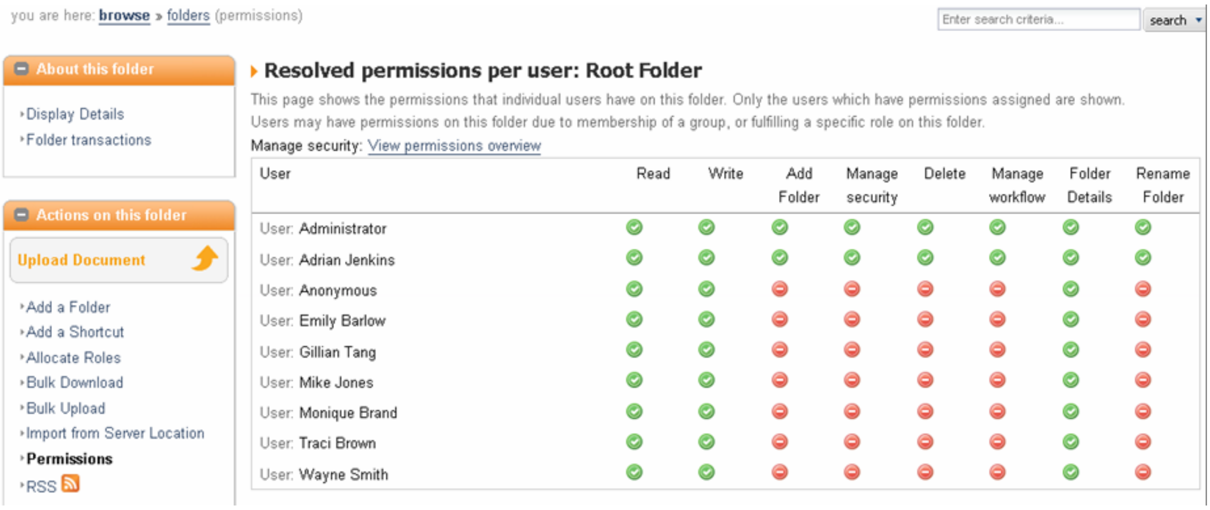
Note: *Typically, only an administrator edits folder permissions, although users may also be granted the permission to do so.*

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.



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

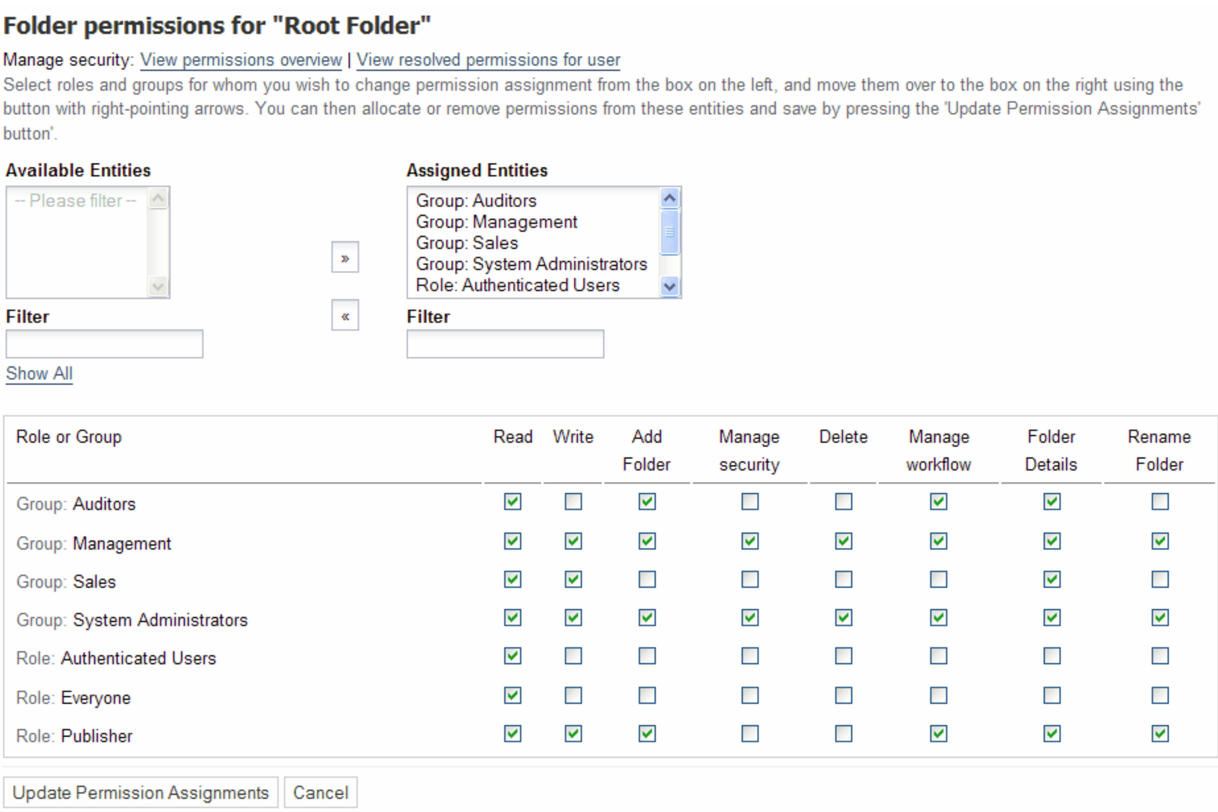
   - **view the permissions of individual system users on this folder?** Click ***View resolved permissions*** for user. Review the list of users onscreen. Note whether the user is part of a role or a group. To change the permissions on this folder for a particular user, you will need to change the permissions 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.



3.2.6 Assigning / Editing Roles

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

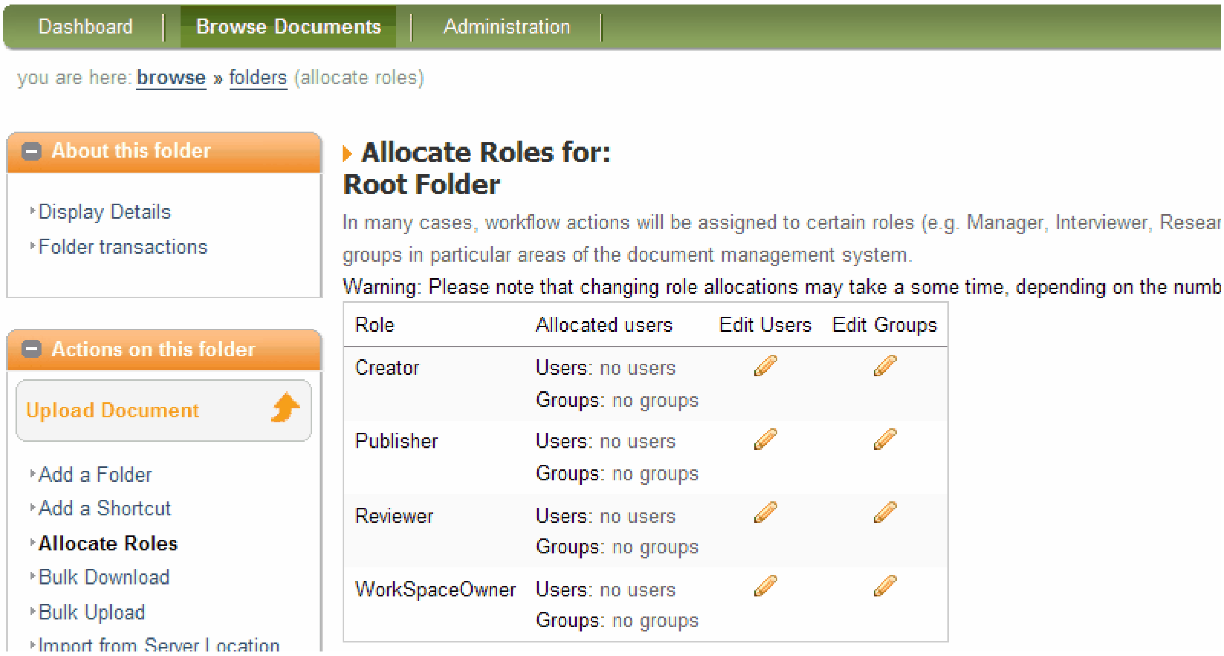
Prerequisite:

- 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.

See Also:
Users, Groups, Roles, and Units

3.2.7 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.*

3.2.8 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. See configuration options for Bulk Exports in Administration - System Configuration - General Settings.*

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*** .

3.2.9 Bulk Uploads

KnowledgeTree allows uploads of multiple documents in a zipped 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

3.2.10 Bulk Uploading Zipped Files

This procedure uploads multiple documents in a zipped archive folder.

Prequisites:

- You need to have Unzip installed on the KnowledgeTree server - *Windows: http://www.info-zip.org/; Unix / Linux: unzip*
- The zipped file must be of a supported compression format and supported extension

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.

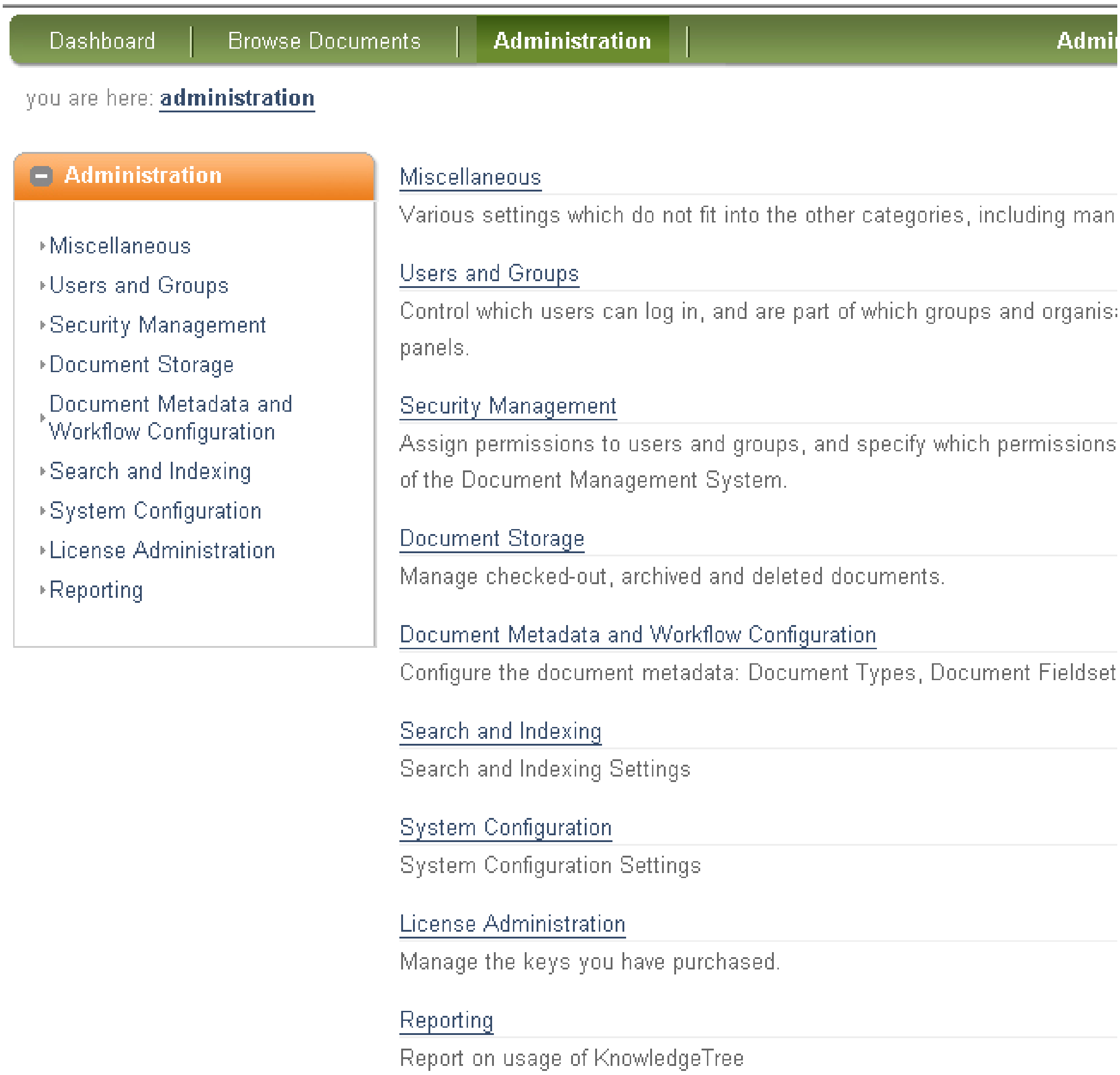
4. Select a document type; then, click **Add**.

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

3.3 Administration

This chapter provides information on the tasks performed through KnowledgeTree's web interface administration module - **Administration**.

- Miscellaneous
- Users and Groups
- Security Management
- Document Storage
- Document Metadata and Workflow Configuration
- Search and Indexing
- System Configuration
- License Administration - KnowledgeTree Commercial Editions only
- Reporting



3.3.1 Miscellaneous

This chapter provides information on tasks performed through **Administration - Miscellaneous**:

- **Edit Quicklinks** - add and edit dashboard Quicklinks
Note: *Quicklinks are only available for KnowledgeTree Commercial. A Community version is available at the KnowledgeTree Forge.*

- **Edit Disclaimers** - add, edit, and delete custom disclaimer text, on the Login page, and as Footers in KnowledgeTree's web interface.

- **Extended Transaction Information** - 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.*

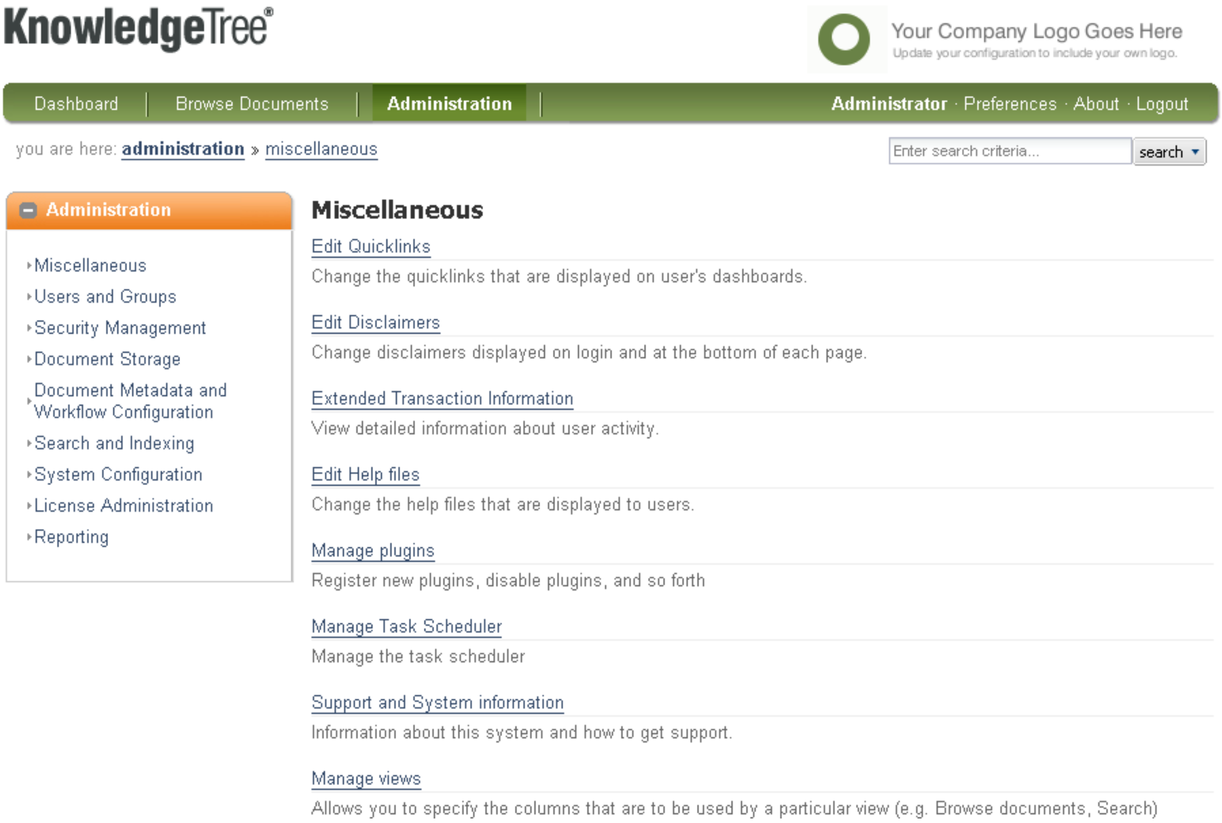
- **Edit Help Files** - add and edit custom system help files

- **Manage Plugins** - read plugins from the file-system, and enable or disable plugin functionality for your KnowledgeTree installation.

- **Manage Task Scheduler** - configure the frequency and next run time of various indexing and house-keeping background tasks, including: the Document Processor, Index Optimization, Periodic Document Expunge, Database Maintenance, OpenOffice Test, Cleaning up of the Temporary Directory, Disk and Folder Usage Statistics, Refresh Index Statistics, Refresh Resource Dependencies, Bulk Download Queue, and Document Alerts.
Note: *This option is not relevant for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

- **Support and System Information** - access support, and download system information in a zip archive (for diagnostic purposes)
Note: *This option is not relevant for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

- **Manage Views** - configure the columns to display in Browse Documents and in Search results



DMS Administration - Miscellaneous

3.3.1.1 Adding/Editing/Deleting 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.

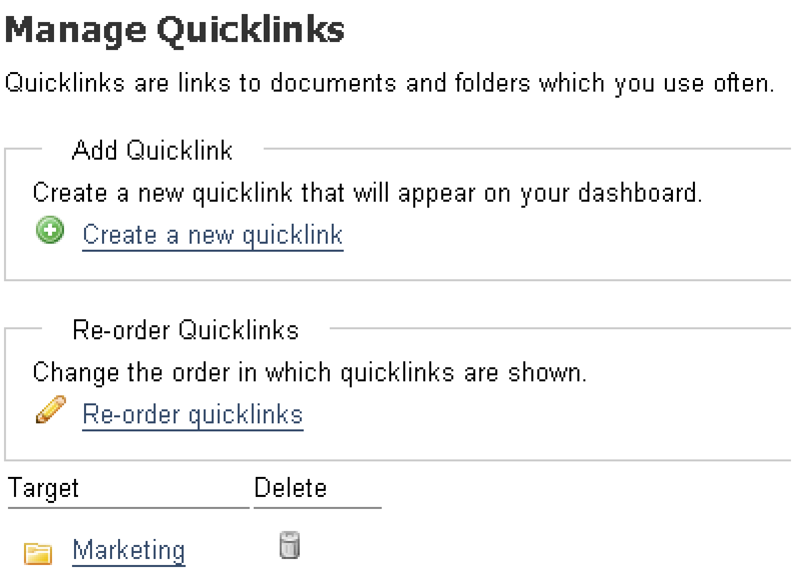
Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, click **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. Quicklinks display on the Dashboard.

   - **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.



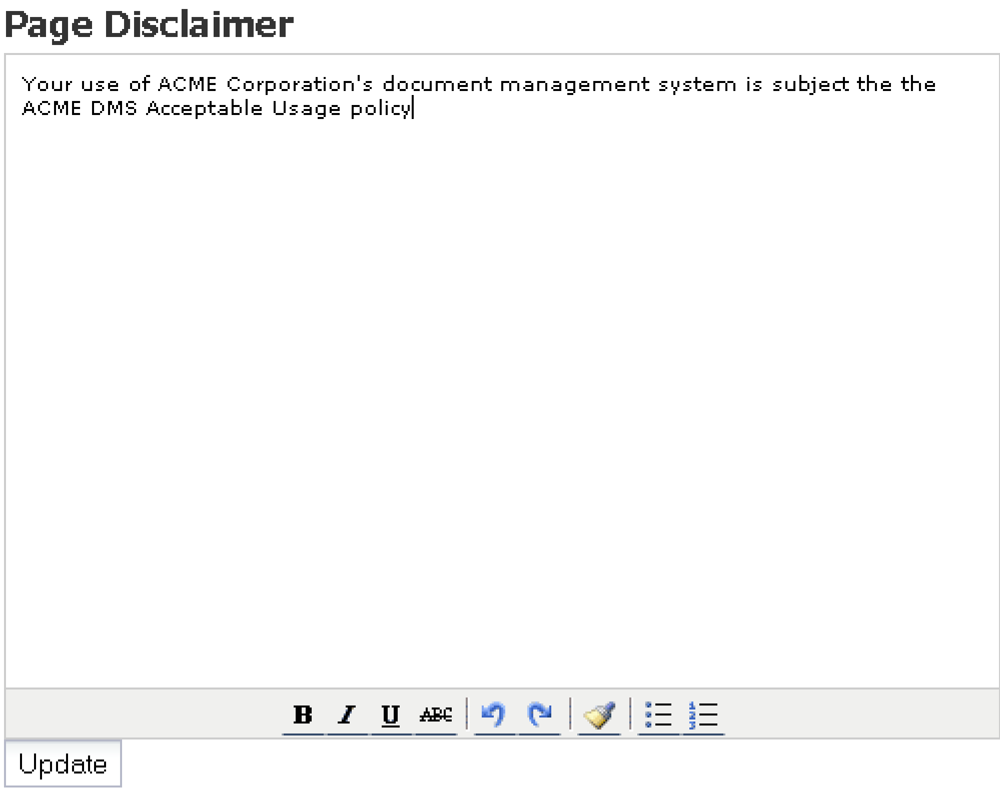
3.3.1.2 Adding/Editing Disclaimers

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 **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.

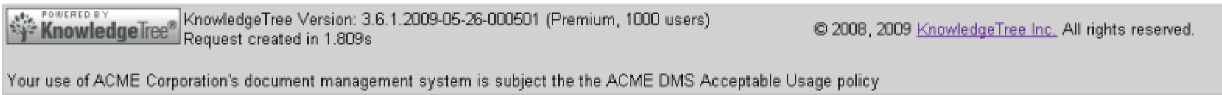


Figure: New Footer Disclaimer

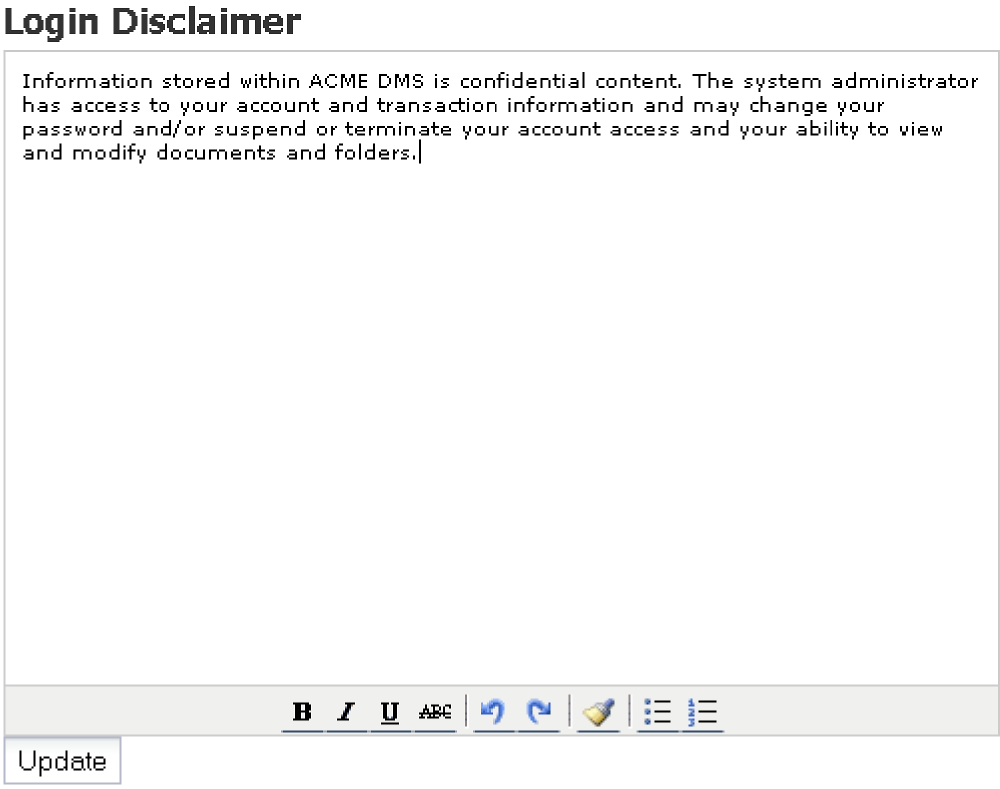


Figure: Edit Login Page Disclaimer

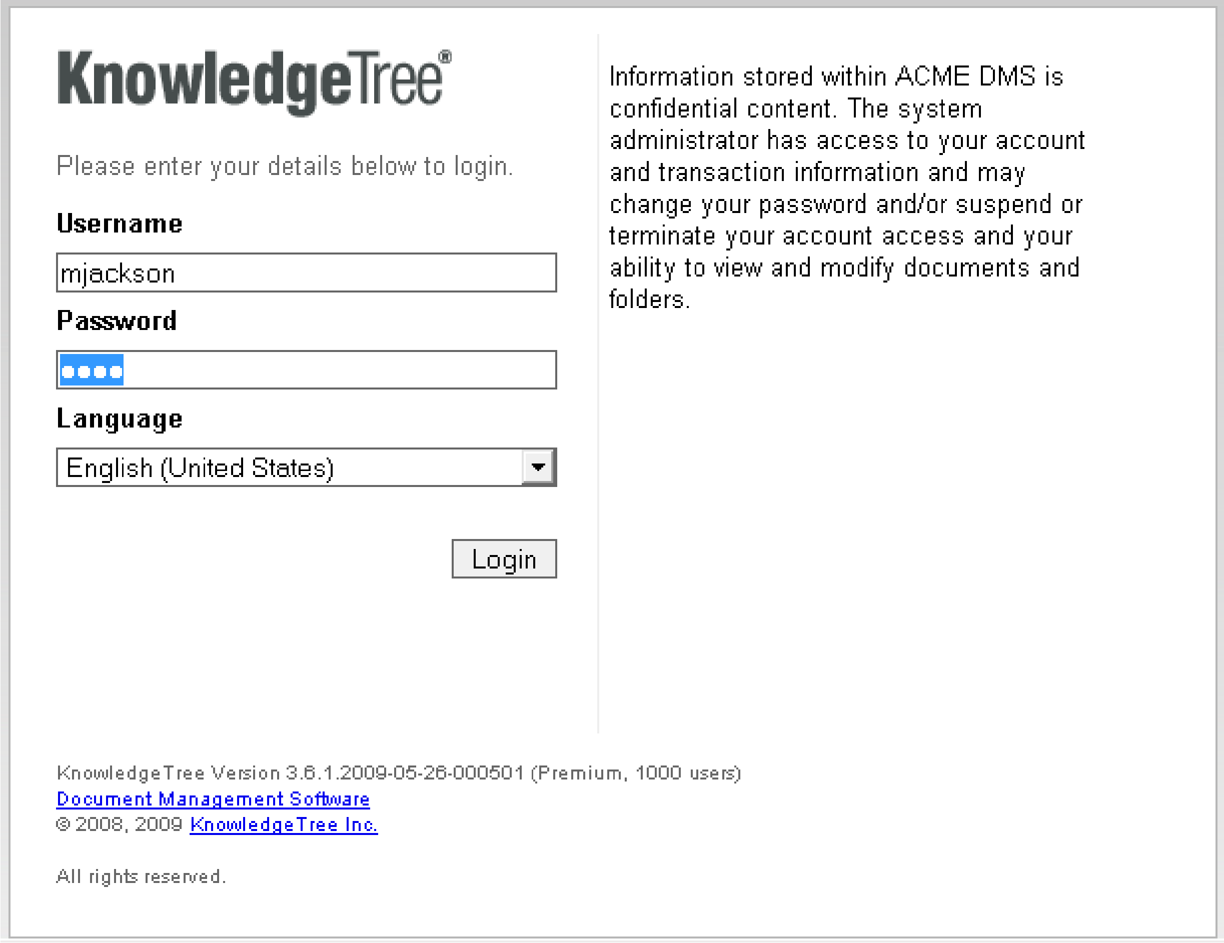


Figure: Custom Disclaimer added to the Login page

3.3.1.3 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:

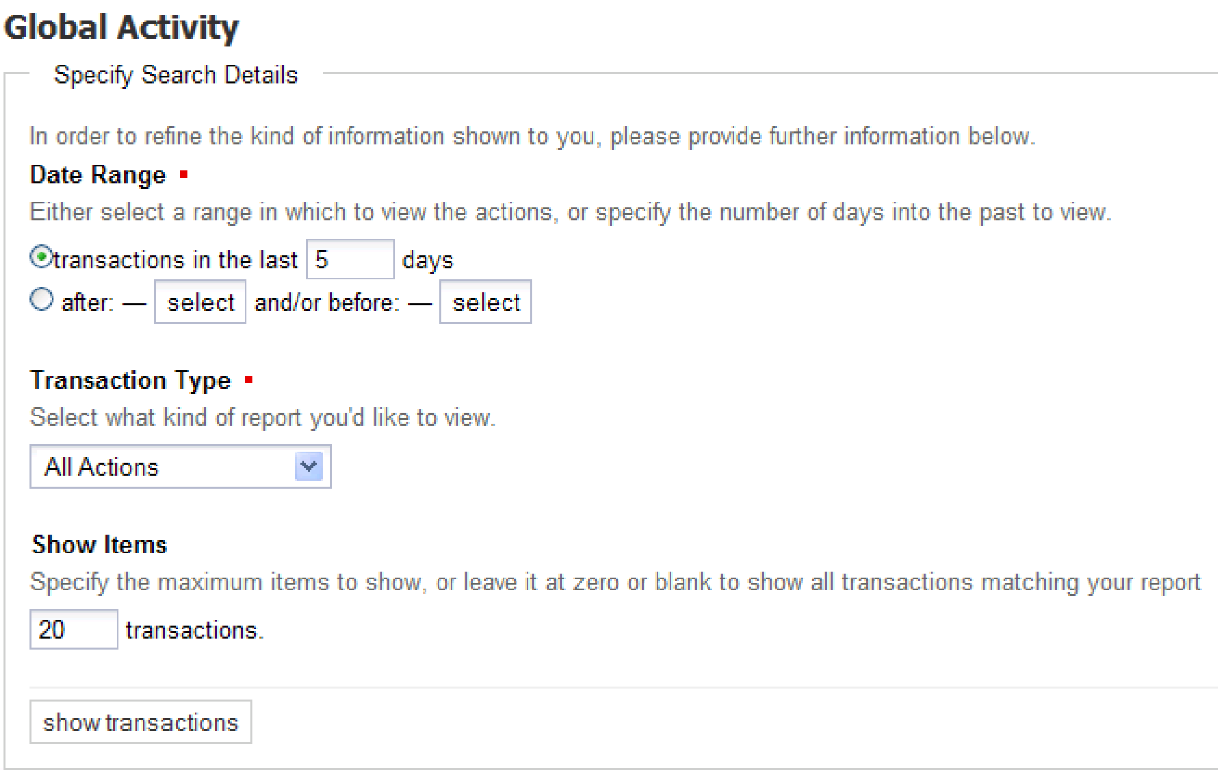
1. Use your administrative credentials to log in to KnowledgeTree's web interface; then, go to **Administration** - **Miscellaneous** - **Extended Transaction Reporting** to open the **Extended Transaction Reporting** page.

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**.



3.3.1.4 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:

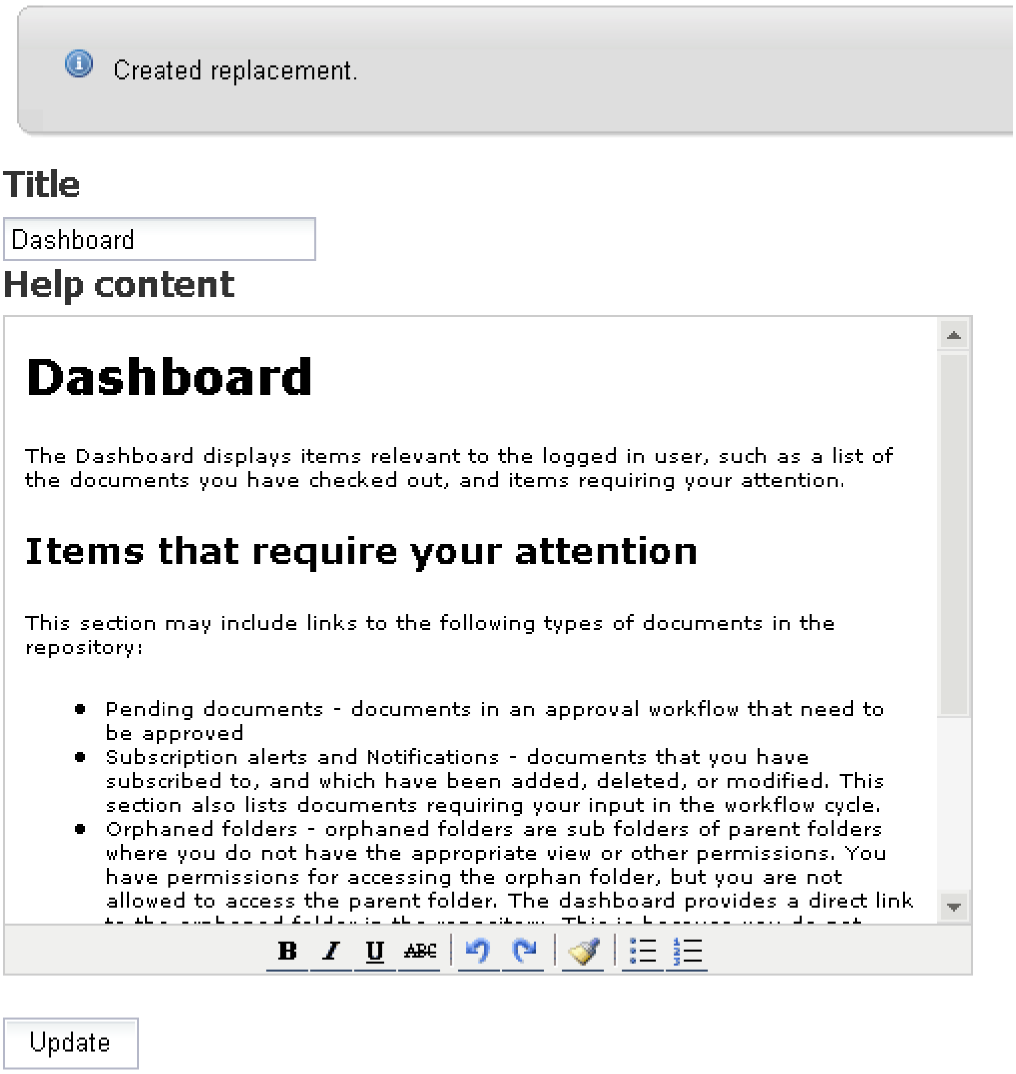
1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **Administration - Miscellaneous - Edit Help Files** to open the **Current help assignments** page.

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 **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.*



Customizing System Help Pages

3.3.1.5 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.

Note: *Some plugins are not available in KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

⊟ 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

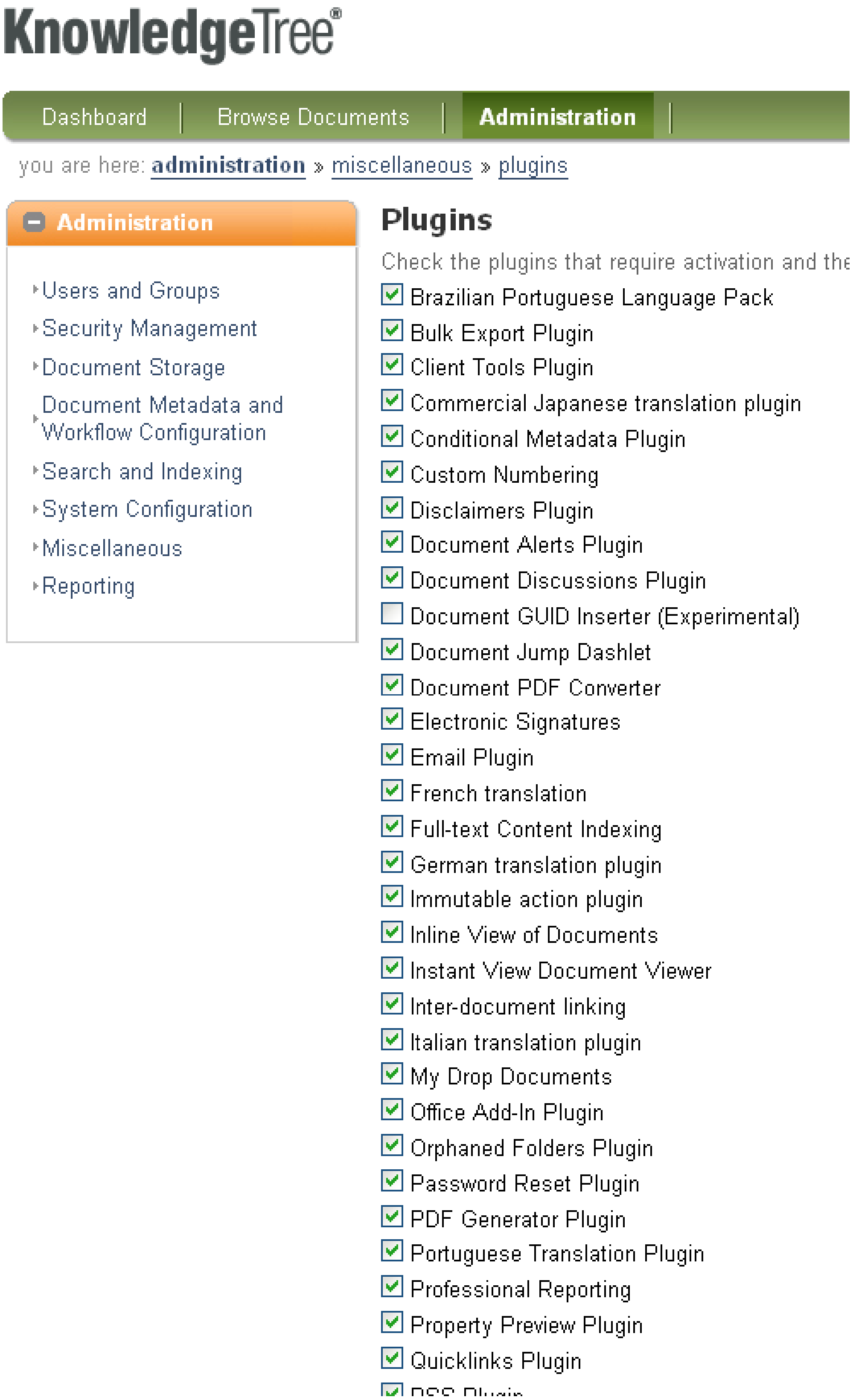
Perform the following steps:

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


KnowledgeTree®
Dashboard
Browse Documents
Administration
you are here: administration » miscellaneous » plugins
Administration
Users and Groups
Security Management
Document Storage
Document Metadata and Workflow Configuration
Search and Indexing
System Configuration
Miscellaneous
Reporting
Plugins
Check the plugins that require activation and the
Brazilian Portuguese Language Pack
Bulk Export Plugin
Client Tools Plugin
Commercial Japanese translation plugin
Conditional Metadata Plugin
Custom Numbering
Disclaimers Plugin
Document Alerts Plugin
Document Discussions Plugin
Document GUID Inserter (Experimental)
Document Jump Dashlet
Document PDF Converter
Electronic Signatures
Email Plugin
French translation
Full-text Content Indexing
German translation plugin
Immutable action plugin
Inline View of Documents
Instant View Document Viewer
Inter-document linking
Italian translation plugin
My Drop Documents
Office Add-In Plugin
Orphaned Folders Plugin
Password Reset Plugin
PDF Generator Plugin
Portuguese Translation Plugin
Professional Reporting
Property Preview Plugin
Quicklinks Plugin

3.3.1.6 The KnowledgeTree Task Scheduler

The KnowledgeTree Task Scheduler runs and manages background tasks and batch jobs for the following functionality:

Note: *This option is not relevant for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

- **Document Processor -** schedule how often indexing occurs in a recurring cycle.
  Note: *The Document Processor replaces the old Indexing engine (pre-3.6.x). 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 KnowledgeTree's Search relies on efficient indexing.*

- **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.

- **OpenOffice test** - checks that the OpenOffice service is running and restarts the service if it has stopped. Configure the OpenOffice.org Service in Administration - System Administration - Search and Indexing.

- **Cleanup Temporary Directory** - this is 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.

- **Disk Usage and Folder Utilization Statistics -** you may view and edit settings for this component in Administration - System Administration - General Settings.

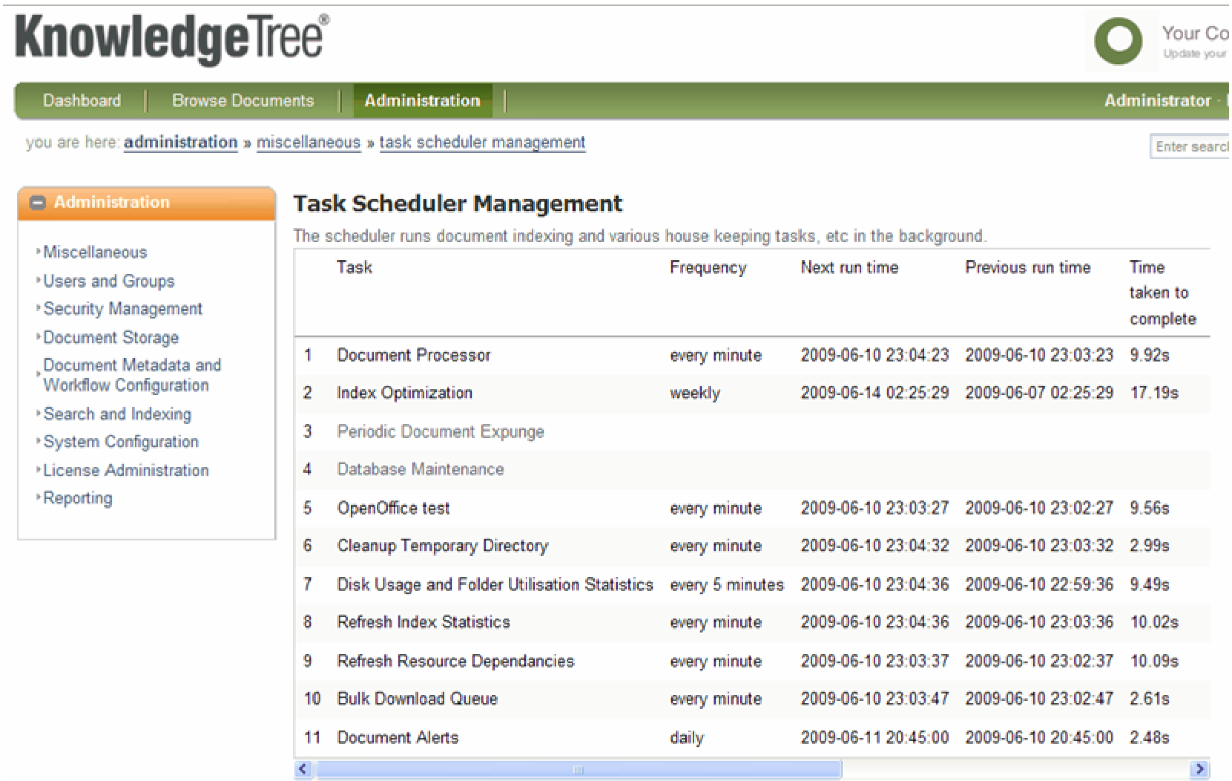
- **Refresh Index Statistics**

- **Refresh resource dependencies**

- **Bulk Download Queue -** runs bulk downloads in the background; configure settings in Administration - System Configuration - General Settings.

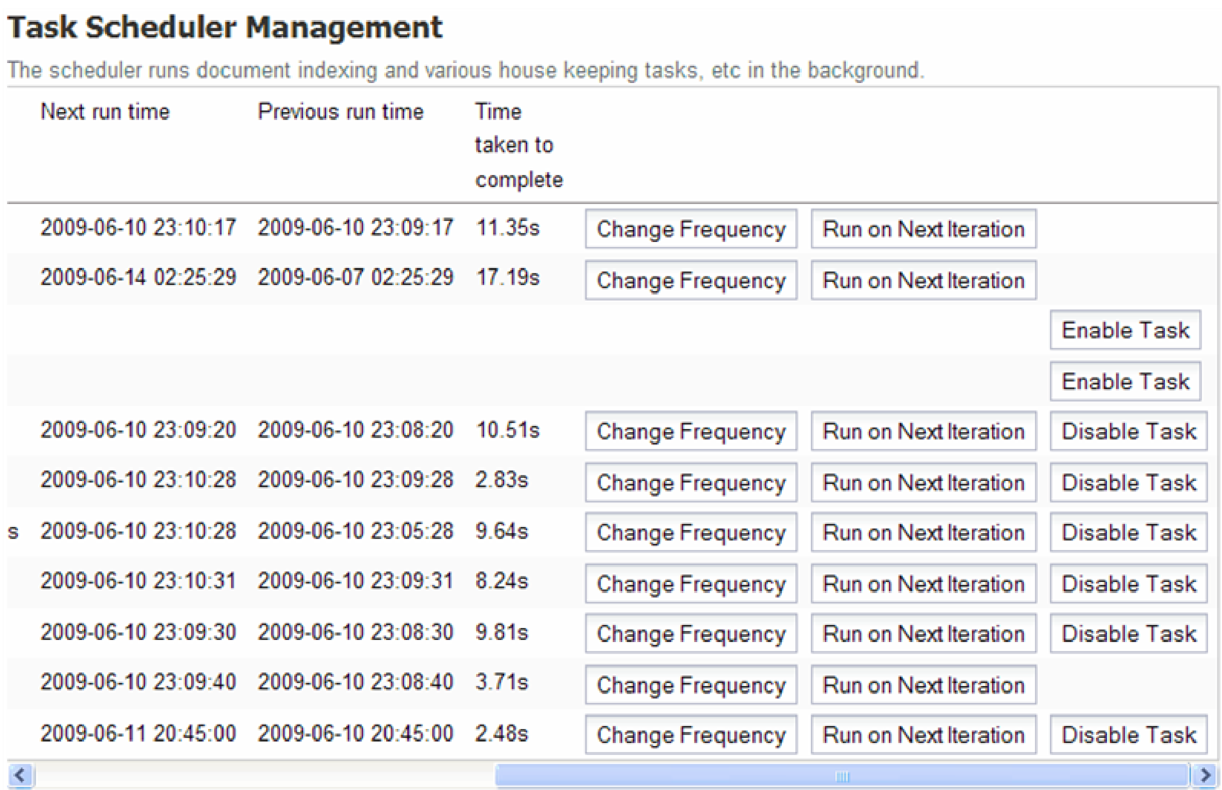
- **Document Alerts**

Note: *These tasks are run by KnowledgeTree's Scheduler service on Windows and on Linux.*



	Task	Frequency	Next run time	Previous run time	Time taken to complete
1	Document Processor	every minute	2009-06-10 23:04:23	2009-06-10 23:03:23	9.92s
2	Index Optimization	weekly	2009-06-14 02:25:29	2009-06-07 02:25:29	17.19s
3	Periodic Document Expunge				
4	Database Maintenance				
5	OpenOffice test	every minute	2009-06-10 23:03:27	2009-06-10 23:02:27	9.56s
6	Cleanup Temporary Directory	every minute	2009-06-10 23:04:32	2009-06-10 23:03:32	2.99s
7	Disk Usage and Folder Utilisation Statistics	every 5 minutes	2009-06-10 23:04:36	2009-06-10 22:59:36	9.49s
8	Refresh Index Statistics	every minute	2009-06-10 23:04:36	2009-06-10 23:03:36	10.02s
9	Refresh Resource Dependancies	every minute	2009-06-10 23:03:37	2009-06-10 23:02:37	10.09s
10	Bulk Download Queue	every minute	2009-06-10 23:03:47	2009-06-10 23:02:47	2.61s
11	Document Alerts	daily	2009-06-11 20:45:00	2009-06-10 20:45:00	2.48s

Figure: Managing the Task Scheduler - Use the bottom scroll bar view the Task Scheduler options (see screenshot below)



	Next run time	Previous run time	Time taken to complete			
	2009-06-10 23:10:17	2009-06-10 23:09:17	11.35s	Change Frequency	Run on Next Iteration	
	2009-06-14 02:25:29	2009-06-07 02:25:29	17.19s	Change Frequency	Run on Next Iteration	
						Enable Task
						Enable Task
	2009-06-10 23:09:20	2009-06-10 23:08:20	10.51s	Change Frequency	Run on Next Iteration	Disable Task
	2009-06-10 23:10:28	2009-06-10 23:09:28	2.83s	Change Frequency	Run on Next Iteration	Disable Task
s	2009-06-10 23:10:28	2009-06-10 23:05:28	9.64s	Change Frequency	Run on Next Iteration	Disable Task
	2009-06-10 23:10:31	2009-06-10 23:09:31	8.24s	Change Frequency	Run on Next Iteration	Disable Task
	2009-06-10 23:09:30	2009-06-10 23:08:30	9.81s	Change Frequency	Run on Next Iteration	Disable Task
	2009-06-10 23:09:40	2009-06-10 23:08:40	3.71s	Change Frequency	Run on Next Iteration	
	2009-06-11 20:45:00	2009-06-10 20:45:00	2.48s	Change Frequency	Run on Next Iteration	Disable Task

Figure: Managing the Task Scheduler - displaying available actions: change task frequency, run on next iteration, and disable/enable tasks

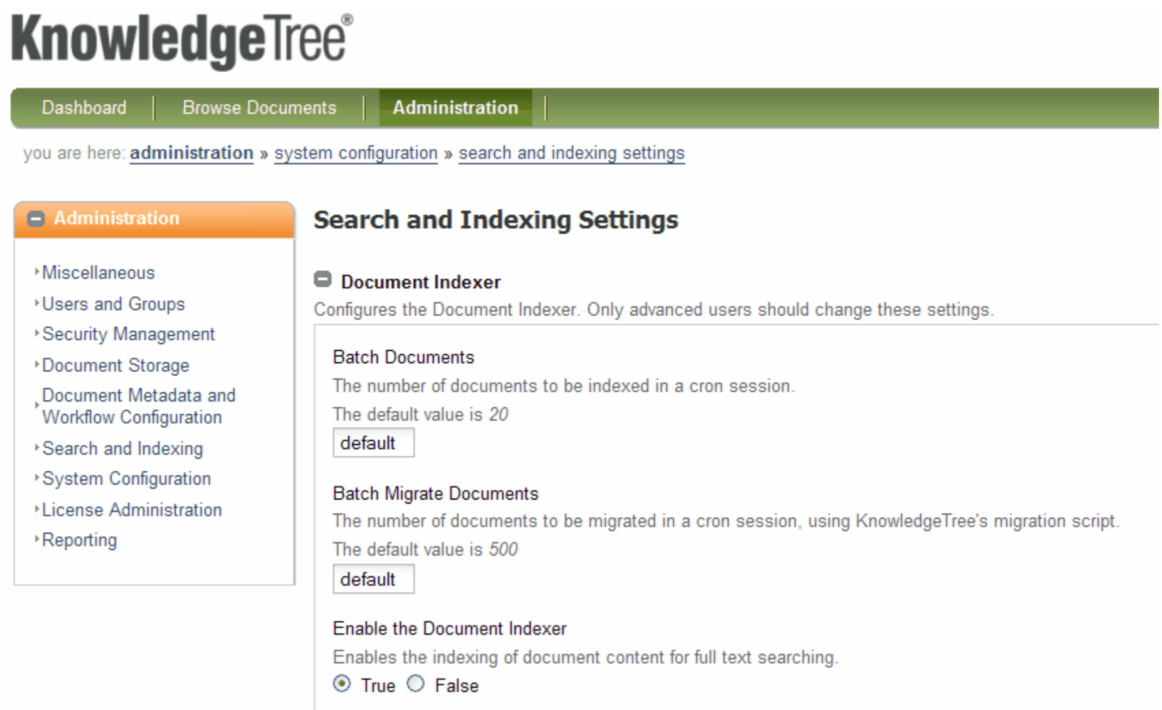
3.3.1.6.1 Scheduled Indexing

The Indexing script should be scheduled to run approximately every 5 minutes.

Note: *This option is not relevant for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki. These settings are configured to run every 5 minutes by default in KnowledgeTreeLive.*

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 one minute.

The number of documents to be indexed is configured through **Administration - System Administration - Search and Indexing - Document Indexer - Batch Documents**. The default is 20 documents.



3.3.1.6.2 Optimizing Indexing for Search

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: *This option is not relevant for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

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")

3.3.1.6.3 Managing Scheduled Tasks

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

Note: *This option is not relevant for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

Perform the following steps:

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

2. Click ***Manage Task Scheduler***.

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

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

   - **disable a task?** Click the ***Disable task*** link for the relevant task. The Scheduler will no longer run this task.

- **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.

- **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.

- **run a task the next time the Scheduler runs?** Click ***Run on next iteration***.

3.3.1.7 Viewing 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.

Note: *This option is not relevant for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

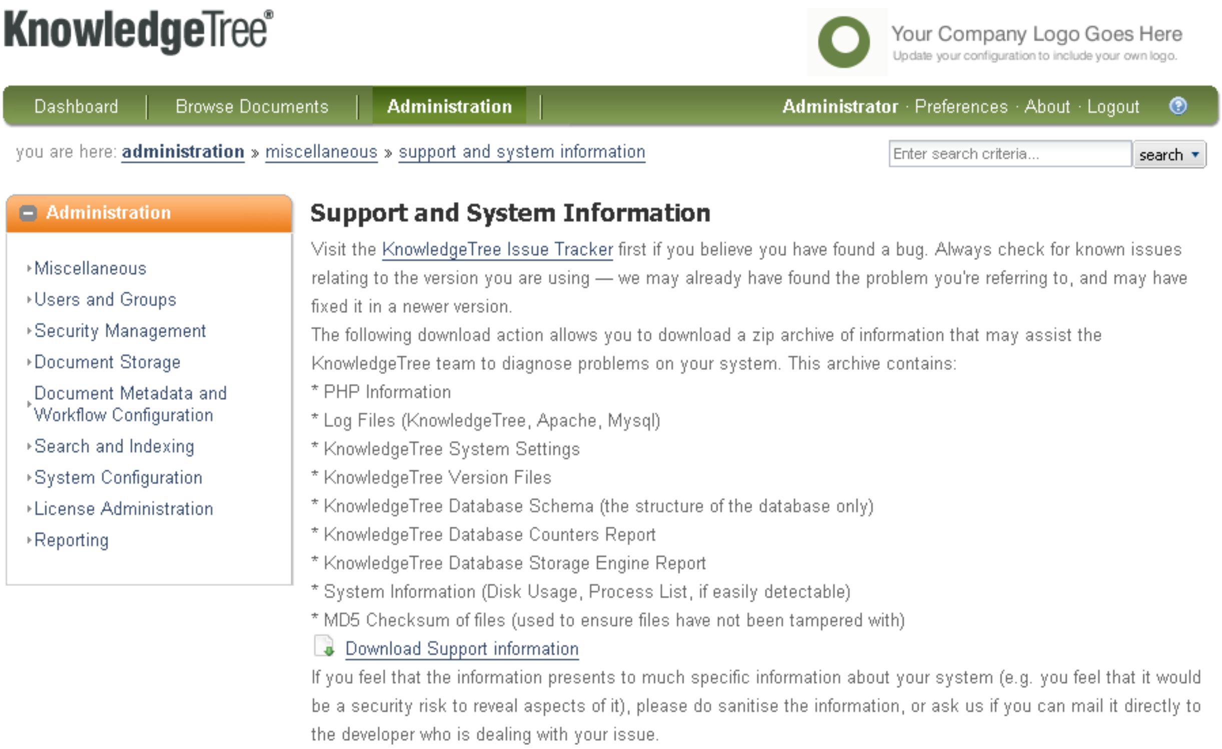
Perform the following steps:

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

3.3.1.8 Managing Views

This procedure displays and edits the columns that 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 **Administration - Miscellaneous - Manage Views**.

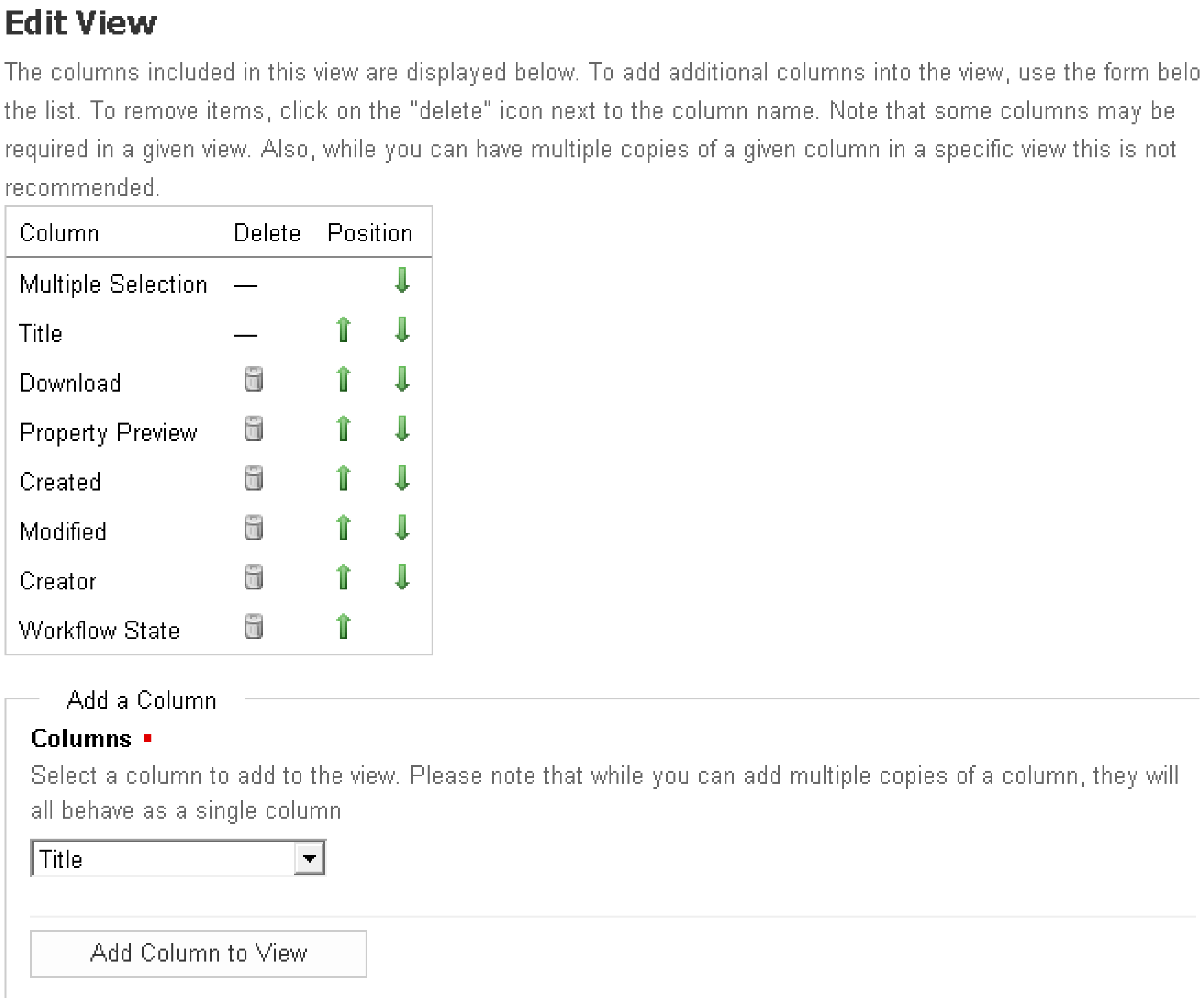
2. On the **Select View** page, choose the view to configure - options are **Browse Documents** and **Search**.

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***.



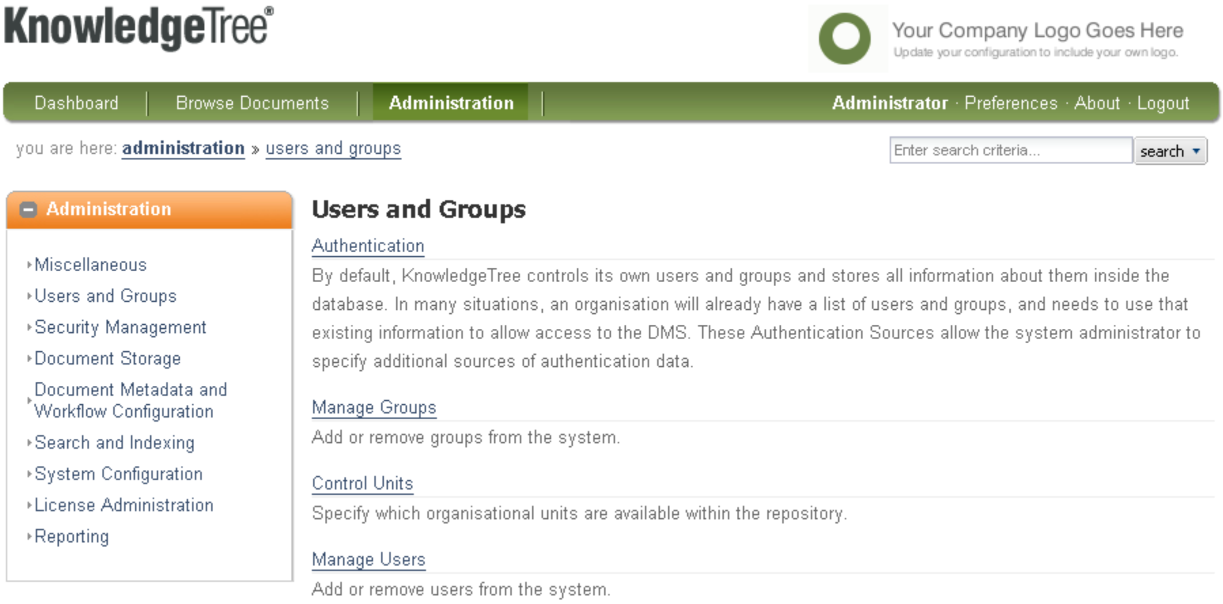
Change the way columns display in Browse Documents

3.3.2 Users and Groups

This chapter provides information on tasks performed through **Administration - Users and Groups**:

- **Authentication** - configure authentication sources and authentication providers for your system, if required.
- **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.



Working with Users, Groups, and Units

3.3.2.1 Authentication

KnowledgeTree provides the following authentication methods:

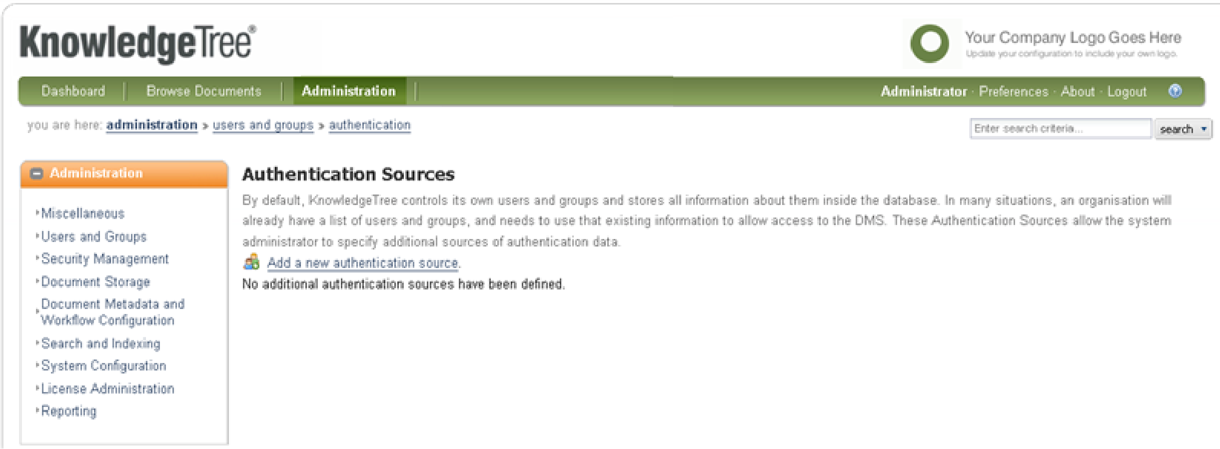
Note: *Choose your preferred authentication method when adding users to KnowledgeTree. If you need to switch the authentication method at a later stage, you will need to delete the old user profiles and add the users again.*

- **Database authentication** - this is KnowledgeTree's inbuilt, default authentication method. User's authenticate on login, and KnowledgeTree verifies the user's login credentials and permissions against its internal database - users are allowed or denied access to documents and folders, and to document and folder actions, based on permissions assigned to their user profile.

- **External authentication** - uses the credentials of your organization's central authentication infrastructure, such Active Directory or LDAP, to control access to KnowledgeTree.

Note on concurrent sessions:
When adding users, the KnowledgeTree system administrator defines the number of concurrent active sessions the user may have - set a minimum number to prevent multiple users from logging in via the same authenticated user profile, simultaneously, and/or from different computers. The default is three. For more on this topic, see Adding New Users.

See Also:
- Adding, Editing, and Deleting Authentication Sources
- Editing Authentication Providers



Add Authentication Source

3.3.2.1.1 Adding/Editing/Deleting Authentication Sources

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

Note: *Some settings may not be available for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

Perform the following steps:

1. Use your administrator login credentials to log in to KnowledgeTree's web interface; then go to **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**.

3.3.2.1.2 Editing Authenication Providers

This procedure edits an existing authentication provider.

Note: *Some settings may not be available for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

Perform the following steps:

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

3.3.2.2 Manage Groups

Users must be added to groups (or roles) in order to view files and folders in KnowledgeTree. This is because permissions are assigned to groups (and to roles) and not to individual users.

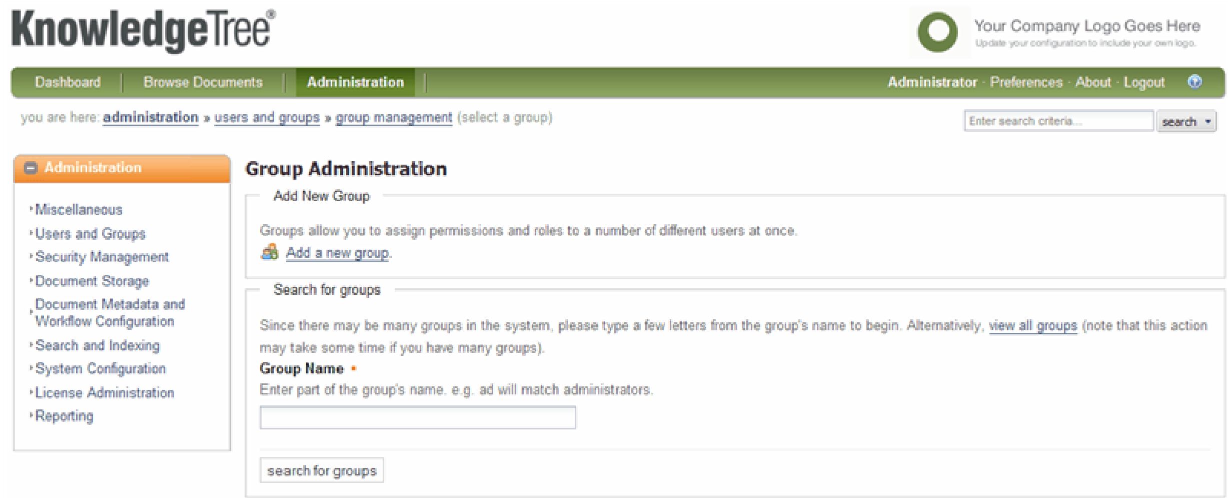


Figure: Manage Groups - main page

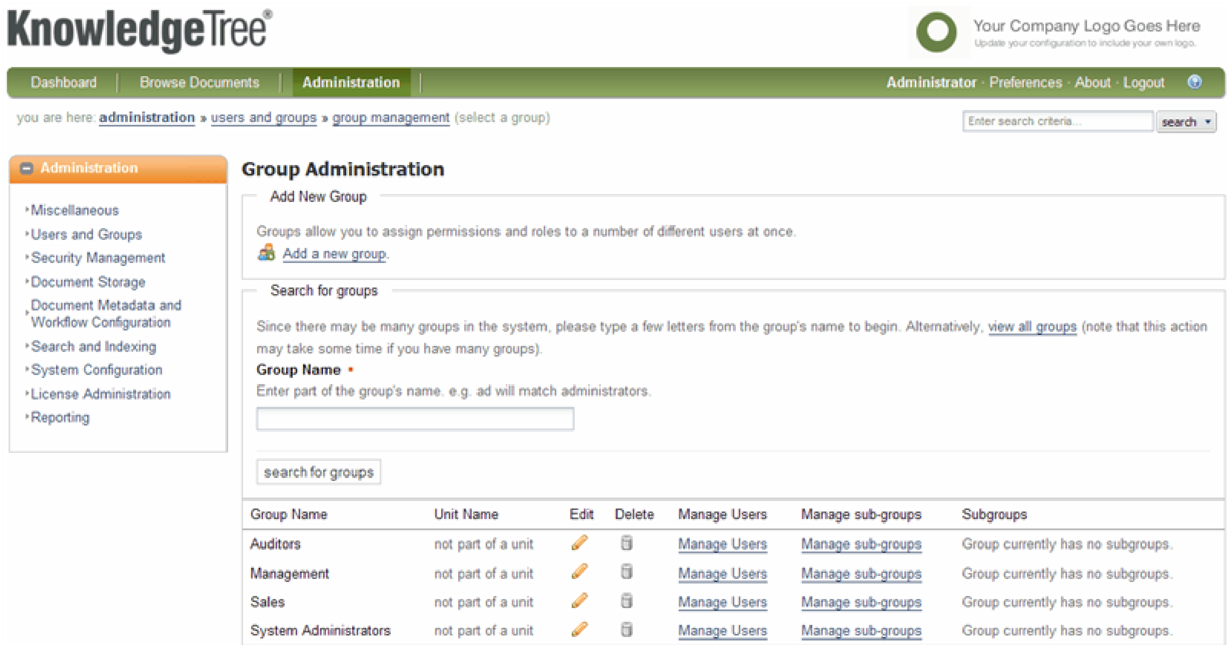


Figure: Manage Groups - view all groups

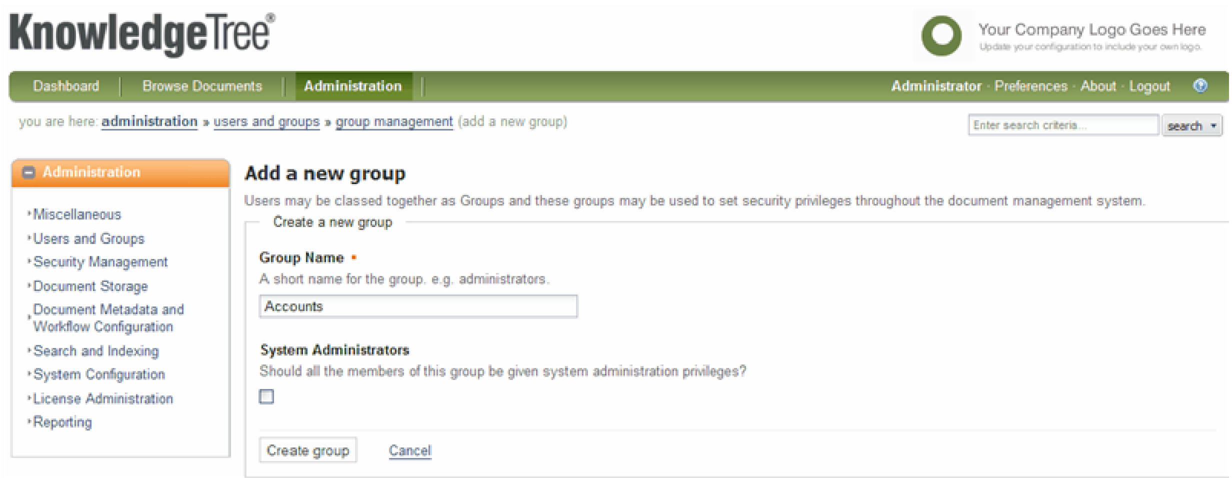


Figure: Manage Groups - add new group

3.3.2.2.1 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 **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.

3.3.2.2.2 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.

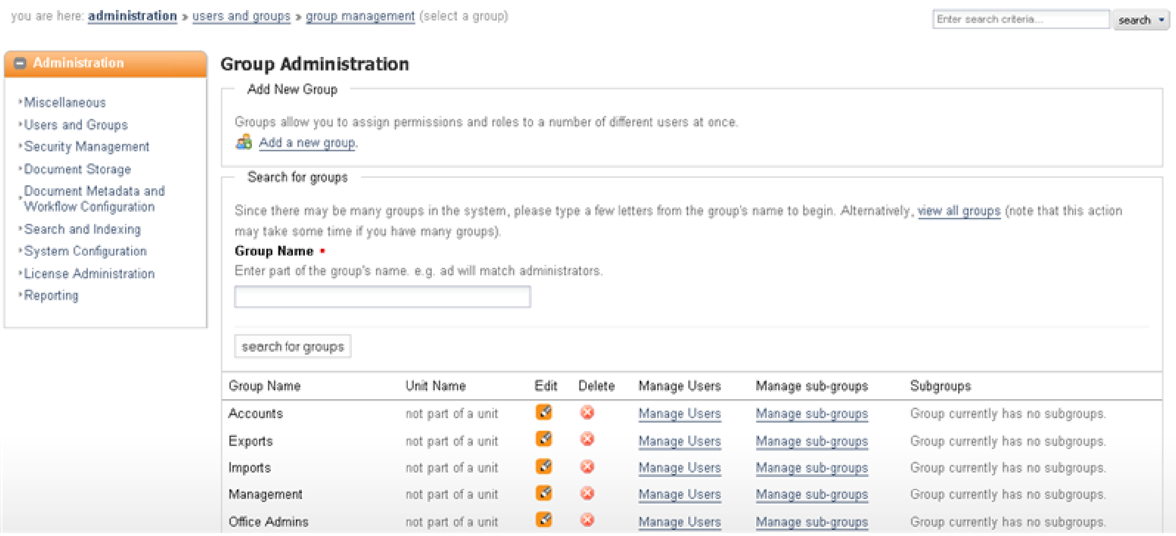
Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **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.
   __Note:__ To configure KnowledgeTree to automatically display all users and/or groups on page load, edit the User Interface settings in __System Configuration__.

   - 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***.

3.3.2.3 Control Units

Units are a method of organizing the content in your KnowledgeTree document management system into two or more separate entities to allow different system administrators to manage these different Units as individual units.

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.

The Units may model your business scenario - departmental or geographic divisions for instance. Adding a Unit adds a folder to the root folder.

See Also:
- Units, Groups, Roles, and Unit
- Adding, editing, and deleting units
- Assigning unit administrators

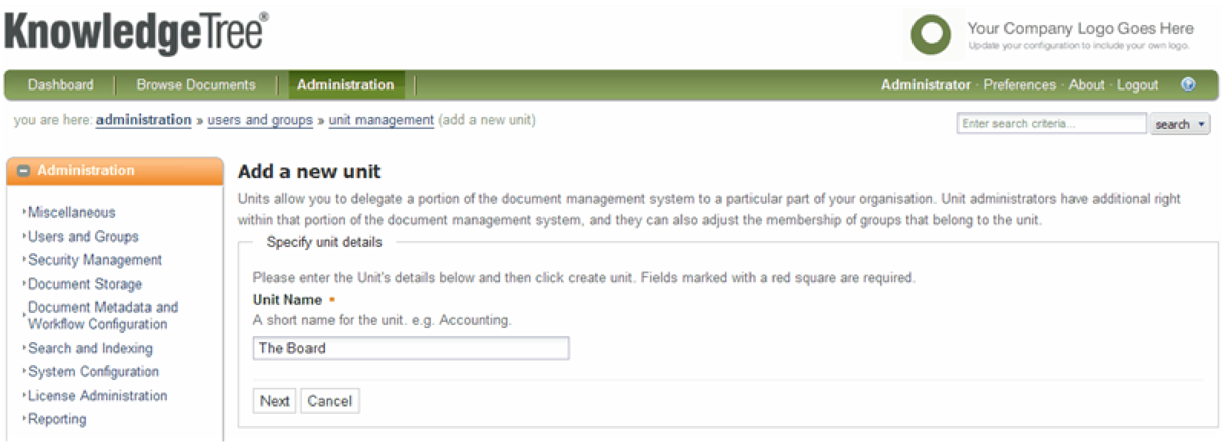


Figure: Control Units - adding a new unit

3.3.2.3.1 Adding/Editing/Deleting Units

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

Perform the following steps:

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

3.3.2.3.2 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.*

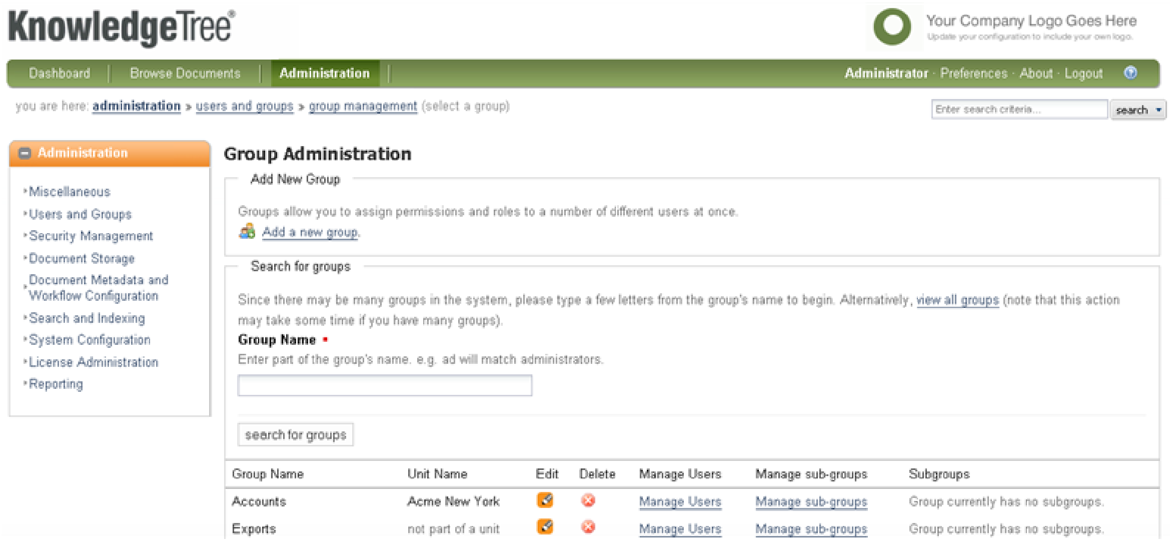
Pre-requisites:

- 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 **Administration - Users and Groups - Manage Groups.**

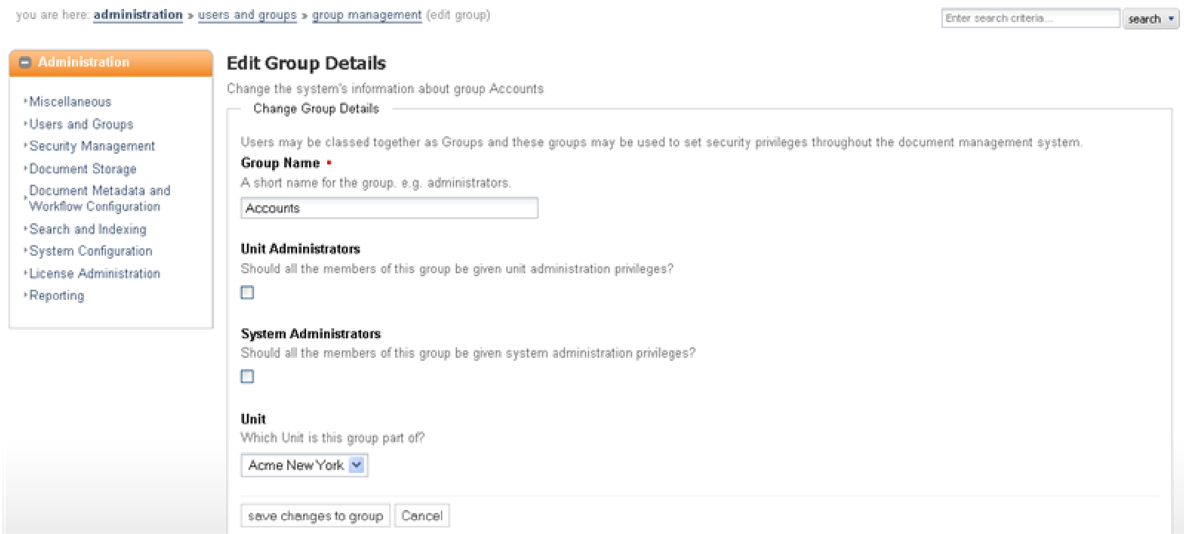
2. Search for a group, or view all groups to locate the group you're editing.



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***.

3.3.2.4 Manage Users

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.

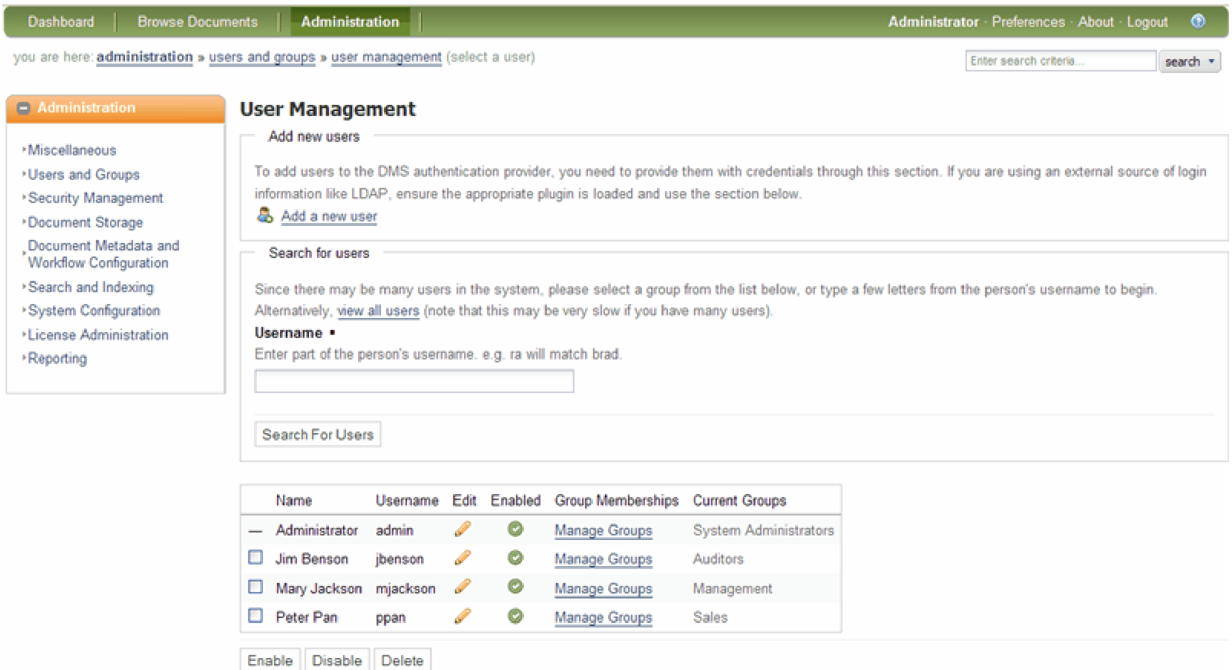


Figure: Manage Users - view existing users

See Also:
[Users, Groups, Roles, and Units]
[Adding users]
[Viewing, editing, deleting users]

3.3.2.4.1 Adding New Users

This procedure adds new users to KnowledgeTree.

⊟ How to add new users manually

Perform the following steps:

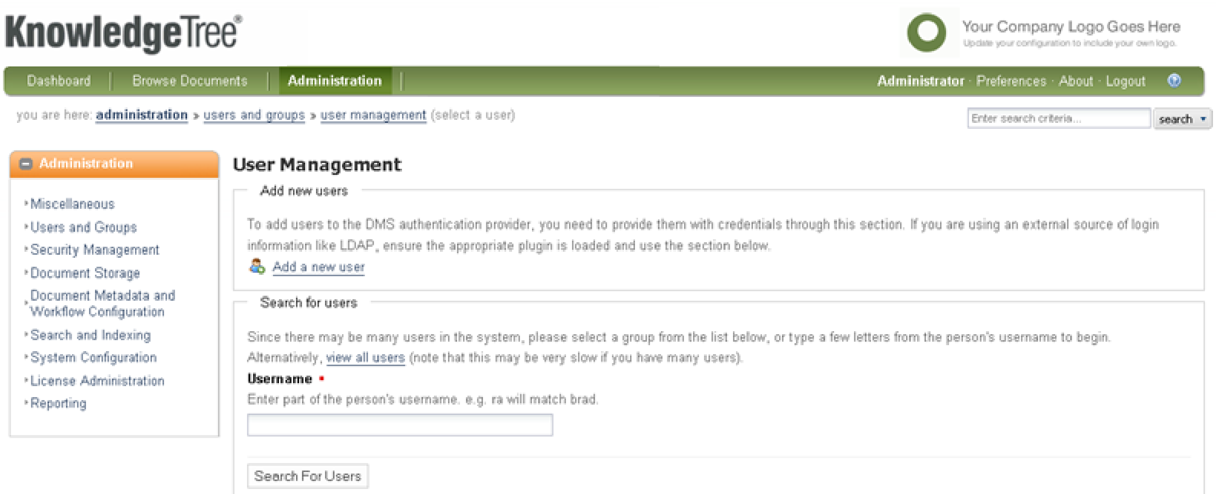
1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **Administration - Users and Groups - Manage Users** to open the **User Management** page.

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 **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.*

3.3.2.4.2 Viewing / Editing / Deleting Users

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

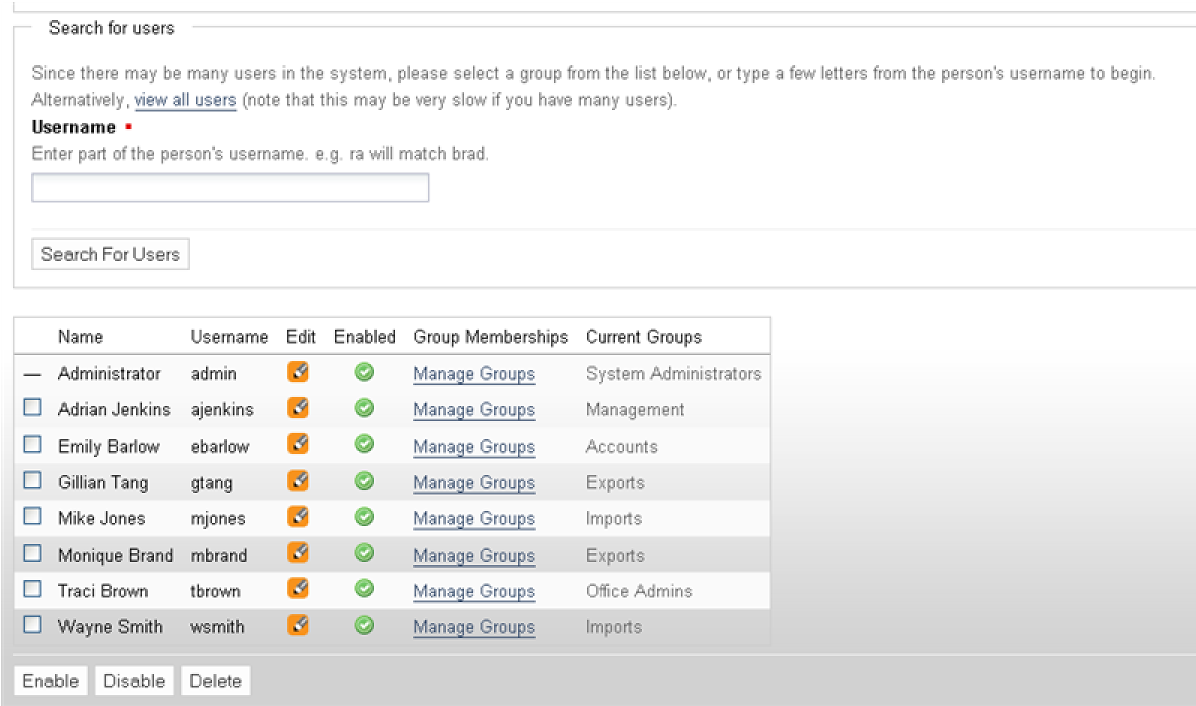
Note*: Deleting a user permanently disables the user in the database - their details are retained to prevent the corruption of data.*

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **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***.
   Note: *To configure KnowledgeTree to automatically display all users and/or groups on page load, edit the User Interface settings in* ***System Configuration****.*



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 ...

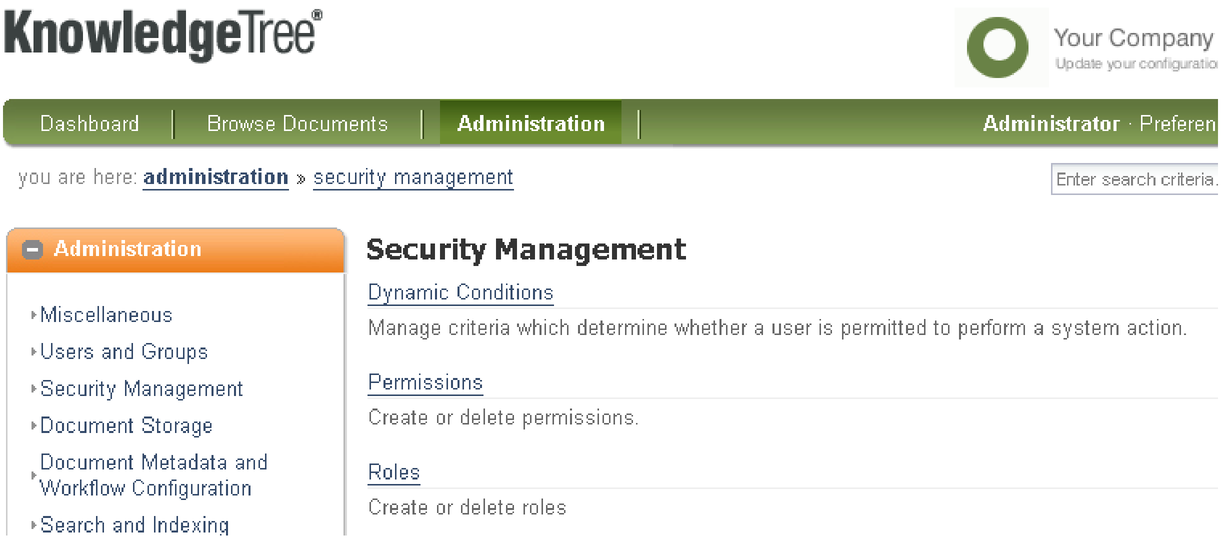
- **add the user to a group**, populate the **Available Groups** field (filter or show all); then select groups for this user. Click the right-pointing arrow to populate the **Assigned Groups** field. Click ***save changes***.

- **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***.

3.3.3 Security Management

Configure the following components in **Administration - Security Management**:

- Dynamic conditions
- Custom permissions
- Roles



Security Management

3.3.3.1 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 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 **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:

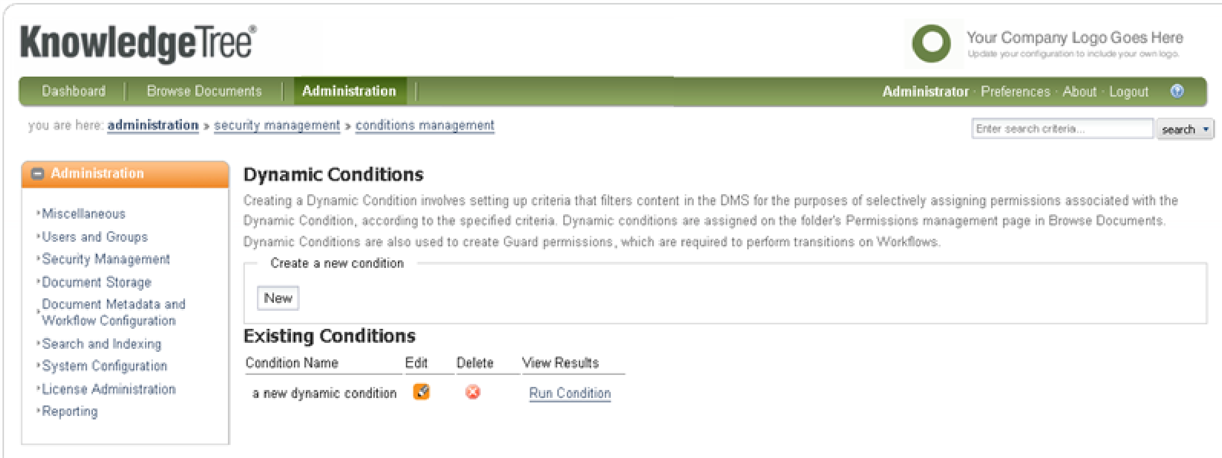
- document metadata - name, type, author, publish date, etc.
- the content within the document
- transactional information for a document - check outs / check-ins / moves / copy actions / etc

See Also:

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

3.3.3.1.1 Configuring 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 **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.

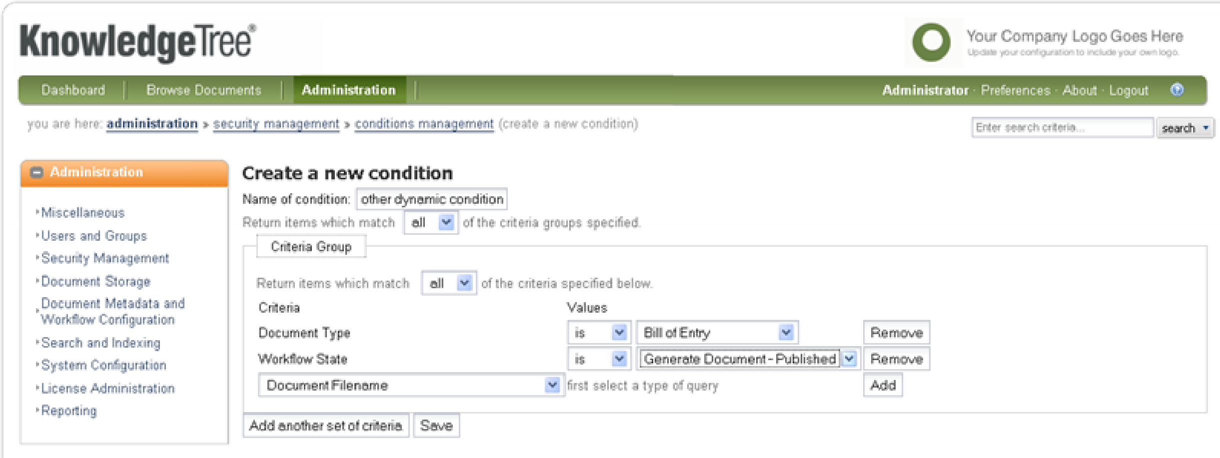
   3.2. Define a name for this condition in the **Name of condition** field.

   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

3.3.3.1.2 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.

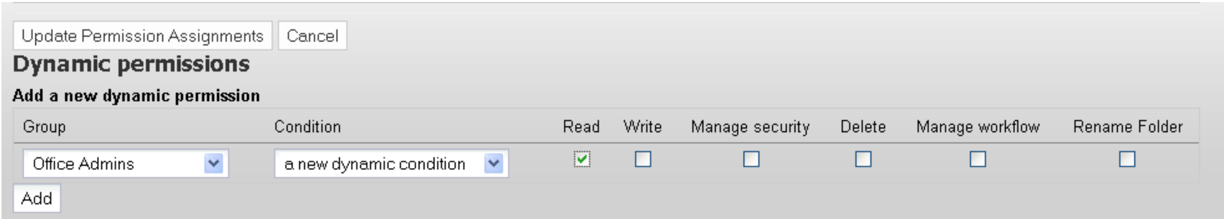


Figure: Assign a dynamic condition on a folder

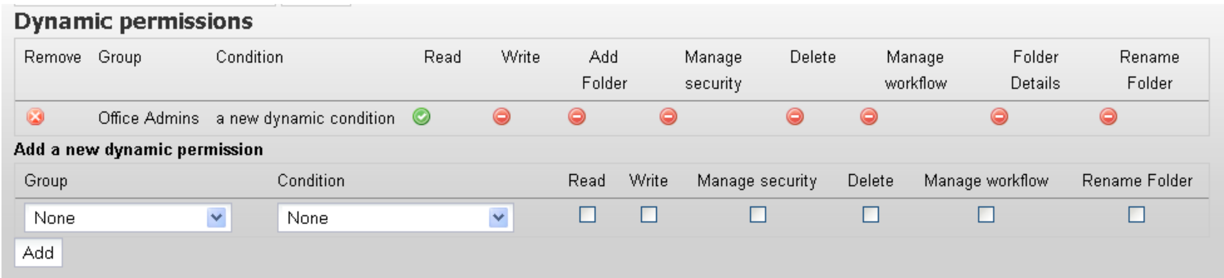


Figure: View dynamic conditions on the folder

3.3.3.1.3 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 **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***.

3.3.3.2 Custom Permissions

KnowledgeTree includes several built-in permissions, and allows you to add custom permissions, which are useful for assigning permissions to access custom plugin functionality.

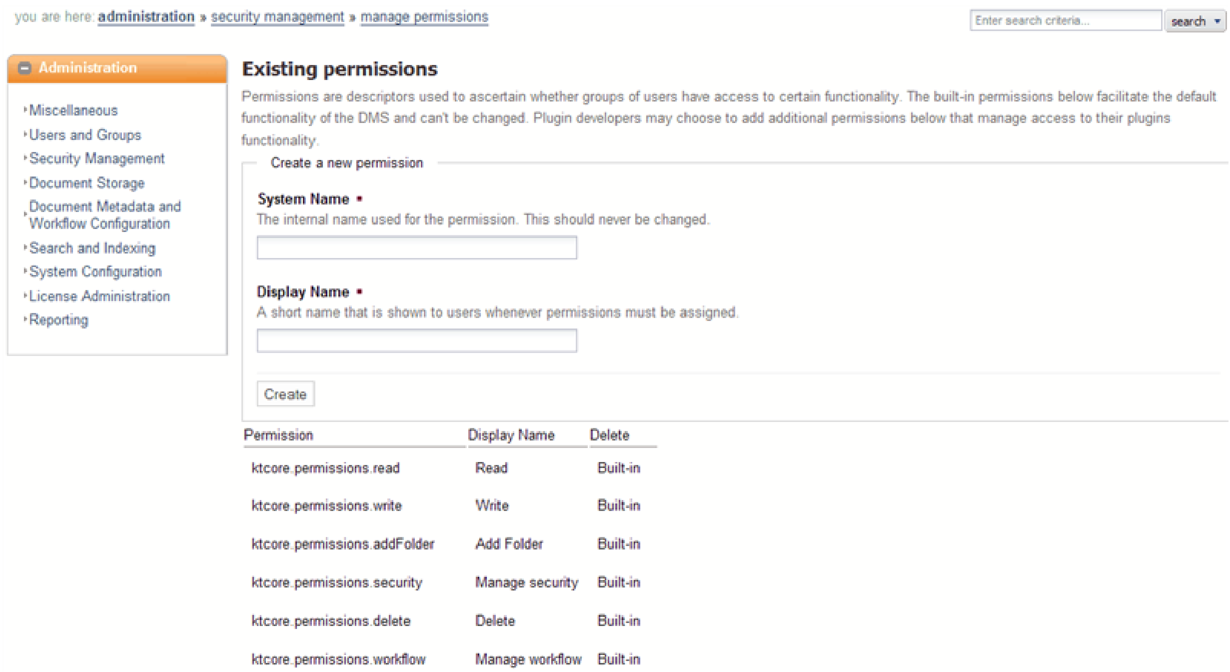


Figure: Custom permissions - main page

See Also:
Creating the Permissions Structure

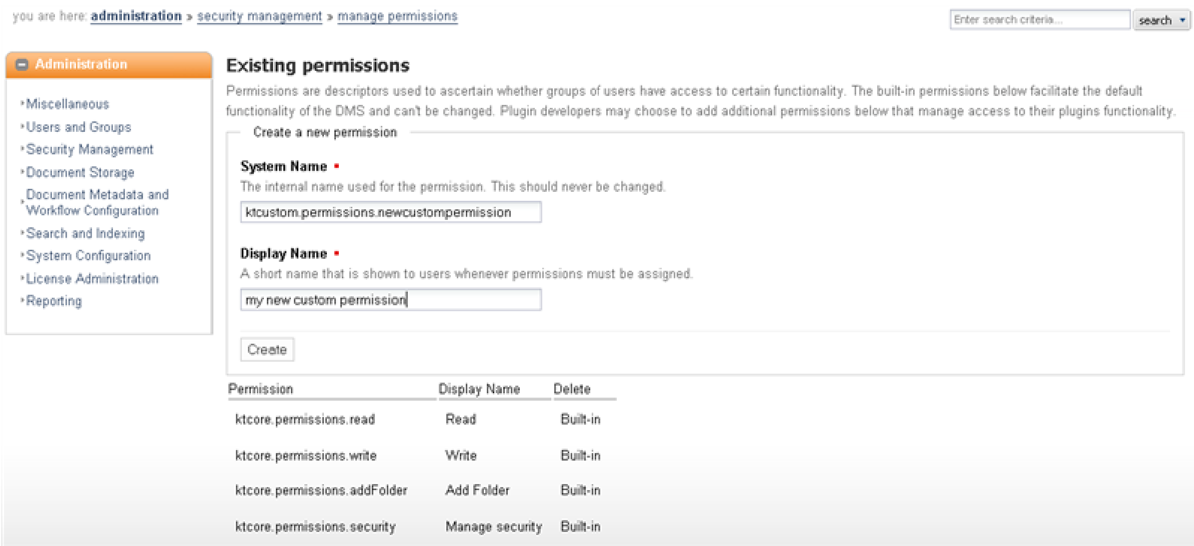
3.3.3.2.1 Adding New Custom Permission Types

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 **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

3.3.3.2.2 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 **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.*

3.3.3.3 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.

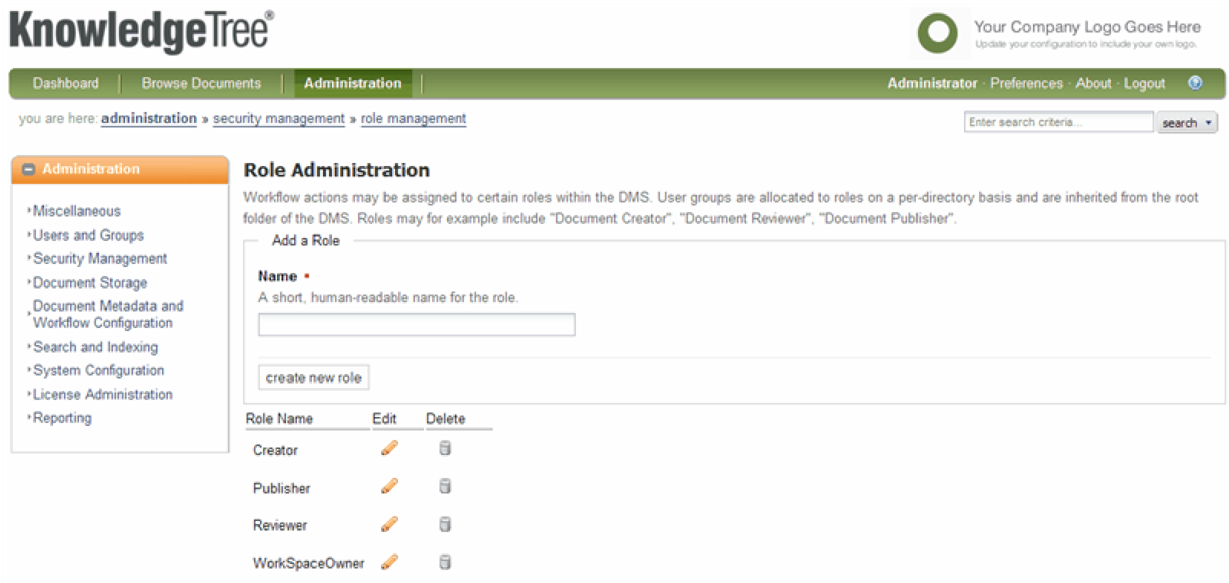


Figure: Roles - viewing existing roles, add new roles

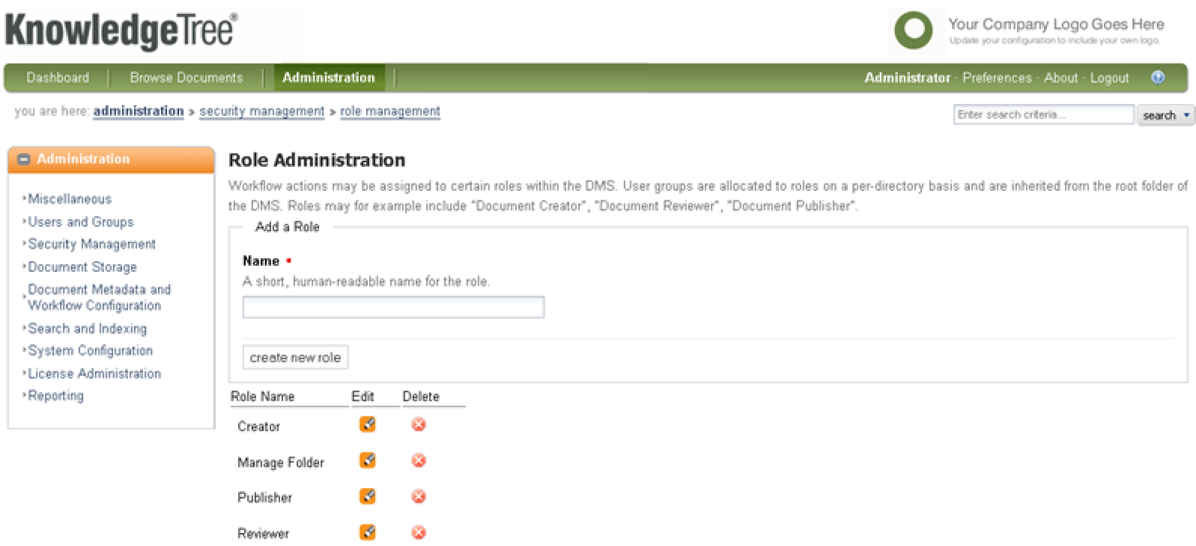
See Also:
[Users, Groups, Roles, and Units](#)

3.3.3.3.1 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 **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]()

3.3.3.3.2 Viewing / Editing / Deleting Roles

This procedure displays, edits, and deletes existing Roles.

Perform the following steps:

1. Use your administrator login credentials to log in to KnowledgeTree's web interface; then, open **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:
[Assigning and editing roles]()

3.3.4 Document Storage

In Administration - Document Storage, you can:

- restore previously archived documents back to the repository
- override a document's checked-out status
- run a database consistency check
- restore or expunge (permanently remove) deleted documents

Note: *Some tasks are not relevant for KnowledgeTreeLive.*

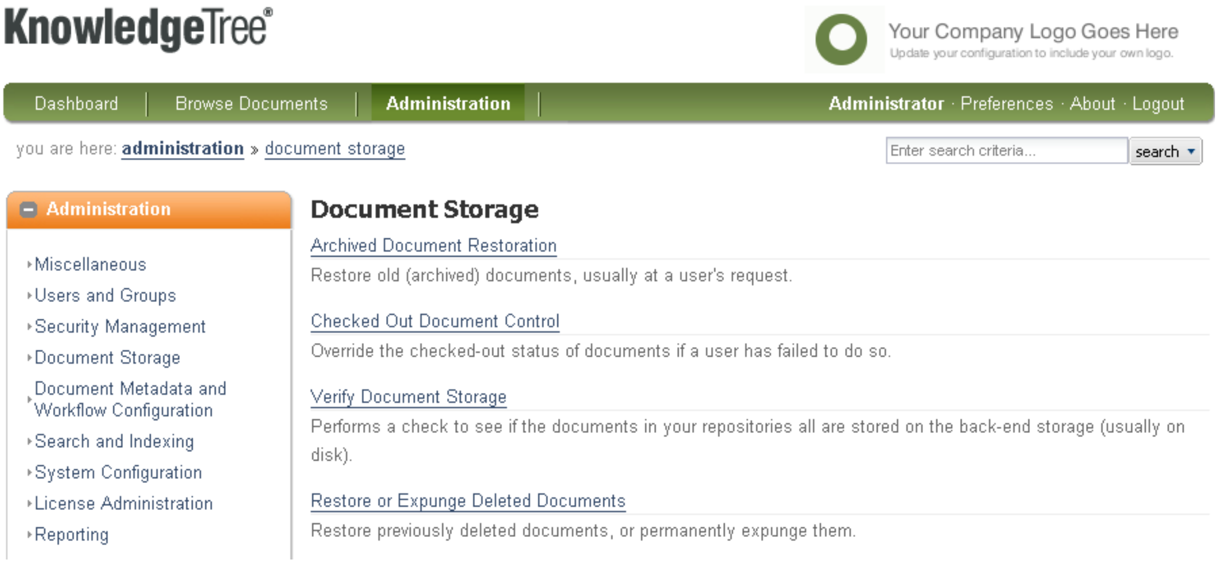


Figure: Document Storage - main page

3.3.4.1 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 **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***.

3.3.4.2 Overriding Document Check-out

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 **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***.

3.3.4.3 Verifying Document Storage

This procedure runs a database consistency check to verify that the contents of the database is the same as the content in the KnowledgeTree content repository.

Note: *This task is not relevant for KnowledgeTreeLive.*

The task should always be performed after upgrading KnowledgeTree.

Perform the following steps:

1. Open **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.

3.3.4.4 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 **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.*
     Note: *You can also configure periodic document expunge as a scheduled, background task through the Task Scheduler.*

3.3.5 Document Metadata and Workflow Configuration

Perform the following tasks to configure the metadata layer within KnowledgeTree:

1. Add the document types, including the email document type

2. Add the fieldsets; then, add fields to each fieldset

3. Associate fieldsets you added with the relevant document types

4. Plan your workflows, including the workflow states and transitions

5. Add your worklows to KnowledgeTree; within each workflow, define states and transitions

6. Allocate workflows to selected document types

The following tasks are performed in **Administration - Document Metadata and Workflow Configuration**:

- Add new custom numbering schemes; view and edit existing custom numbering schemes

- View existing email document types, and add new email document types
- View existing fieldsets, edit and delete existing fieldsets, add new fieldsets, and set up conditional fieldsets
- Viewing, editing, and deleting existing document links, and adding new document links
- Configure alerts by document type
- View, edit, and delete existing document types, add new document types, and associate document types and fieldsets.

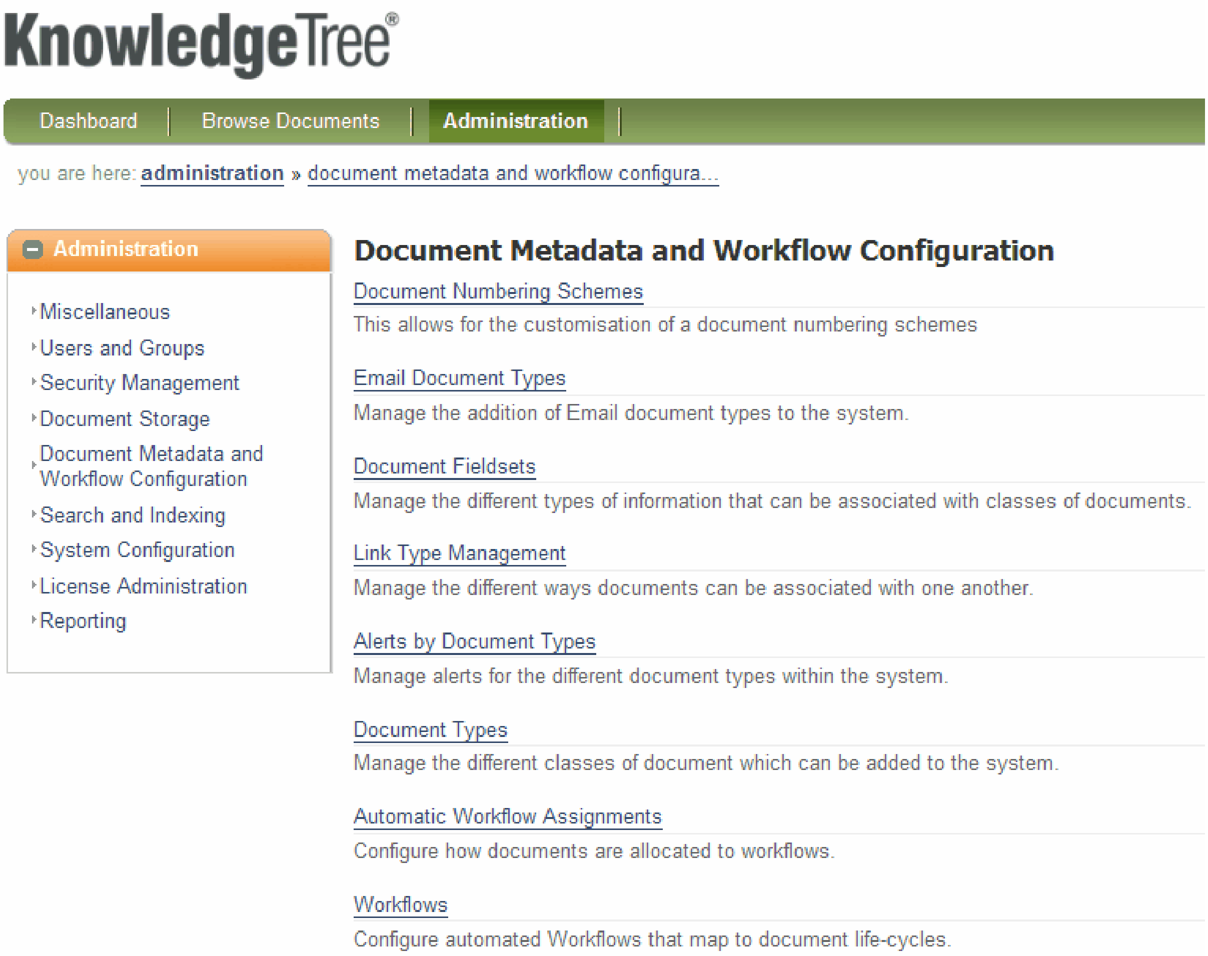


Figure: Document Metadata and Workflow Configuration - main page

3.3.5.1 Document Numbering Schemes

KnowledgeTree's **Custom Document Numbering** feature allows you to define a set of rules for creating custom document numbers for each of the document types in your system.

Commercial Editions Only

Note: *This feature is available only in KnowledgeTree Commercial Editions. You must enable the Custom Numbering plugin to activate this functionality.*

Note: *Custom numbering schemes do not replace or remove KnowledgeTree's default Document ID, which comes from the database - one for each document. The custom numbering scheme allows you to define an additional ID for the document, based on its document type. You may use the KnowledgeTree document ID as an optional element in the custom numbering scheme, if required.*

How are custom numbering schemes used?
When adding new documents to KnowledgeTree, users select a document type. If you have created a custom numbering scheme for the selected document type, KnowledgeTree generates the document's custom document ID, based on the document type, and according to the custom numbering scheme you defined.

When no custom numbering scheme exists for the selected document type, KnowledgeTree generates only the default document ID, which comes from the database - one per document.

Custom Document IDs are generated when new documents are uploaded, and when the document type is changed. Custom Document IDs may be re-generated on check in, if this is defined in the custom numbering scheme. A document's custom document number, and its KnowledgeTree Document ID, displays on the **Document Details** page.

3.3.5.1.1 Document Numbering Scheme Tokens

KnowledgeTree provides a pre-defined collection of case-sensitive 'tokens' (allowable variables), which you may use in various combinations, including plain text strings, to create your custom numbering schemes.

Within a custom numbering scheme, the tokens must be delimited between '<' and '>'. Plain text strings are not delimited.

There are two types of Tokens:

- **Normal tokens** - define the format, and provide a descriptive reference for the document. Examples include: date (day, month, year), path to the document location, version number, KnowledgeTree document ID, and the document type.

- **Sequence tokens**- define how the custom document ID number increments. Sequence tokens define the number sequences within a custom numbering scheme. One sequence token is used in each numbering scheme. You may specify the number of digits in a sequence (e.g, 1 - 9). Note that negative digits are not allowed.

Note: *When adding a numbering scheme, you can define whether to regenerate the document ID when documents are checked in to KnowledgeTree. New numbering schemes are validated to ensure that only supported tokens are used. If the validation fails, check the following:*
- *whether valid tokens are used*
- *whether tokens are properly delimited, i.e. that '<' and '>' are not used outside of the token.*

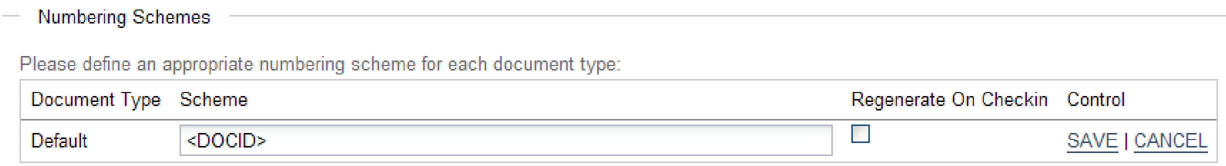


Figure: Defining a custom numbering scheme

Format of the Sequence Token

Format	Example	Result
<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…'

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-0
03"

DOCUMENT-<DD>-<MM>-<YEAR>:<YEAR_SEQ>
"DOCUMENT-31-12-2007:1, DOCUMENT-31-12-2007:2"

Pre-defined Tokens

The table lists the pre-defined normal and sequence tokens for use with custom numbering schemes:

Token (Normal)	Description	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 ***Note:*** *The Document ID and the numbering scheme must not be used interchangeably .*	22
<PATH>	Repository document/folder path (Max 50 chars)	/INVOICE/2007/ABC/
Token (Sequence)	**Description**	**Example**

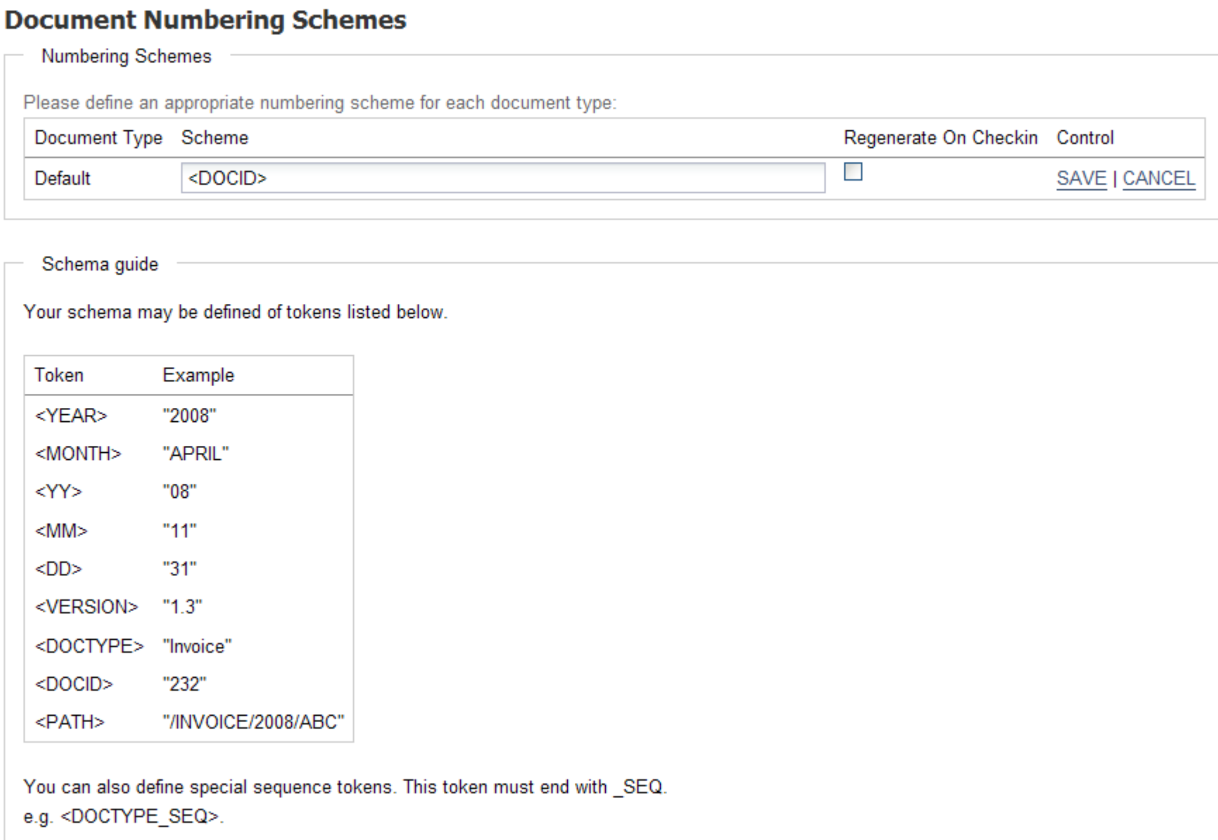
<DOC_TYPE_SEQ:[1-9]>	Store a single sequence for each document type in the system Counter, incremented each time a document of a particular type is added to the system	Invoice001, Invoice002, Invoice003
<YEAR_SEQ:[1-9]>	Store a single sequence. Counter, reset on a yearly basis. Increment the counter each time a document is added within the year.	Invoice2007-001, Invoice2007-002, Invoice2008-001
<YEAR_MONTH_SEQ:[1-9]>	Store a single sequence. Counter, on a monthly basis, reset yearly. Counter is incremented every time a document is added within a month.	Invoice2007-January-001, Invoice2007-January-002, Invoice2007-February-001
<DOCTYPE_YEAR_SEQ:[1-9]>	Store a single sequence for each document type in the system. Incremented each time a document of a certain type is added to the system. Counter, reset on a yearly basis.	Invoice2007-002, Invoice2008-001
<DOCTYPE_YEAR_MONTH_SEQ:[1-9]>	Store a single sequence for each document type in the system. Incremented each time a document of a certain type is added to the system. Counter, reset on a monthly basis	Invoice2007-January-001, Invoice2007-January-002, Invoice2007-February-001

3.3.5.1.2 Viewing / Editing / Adding Custom Numbering

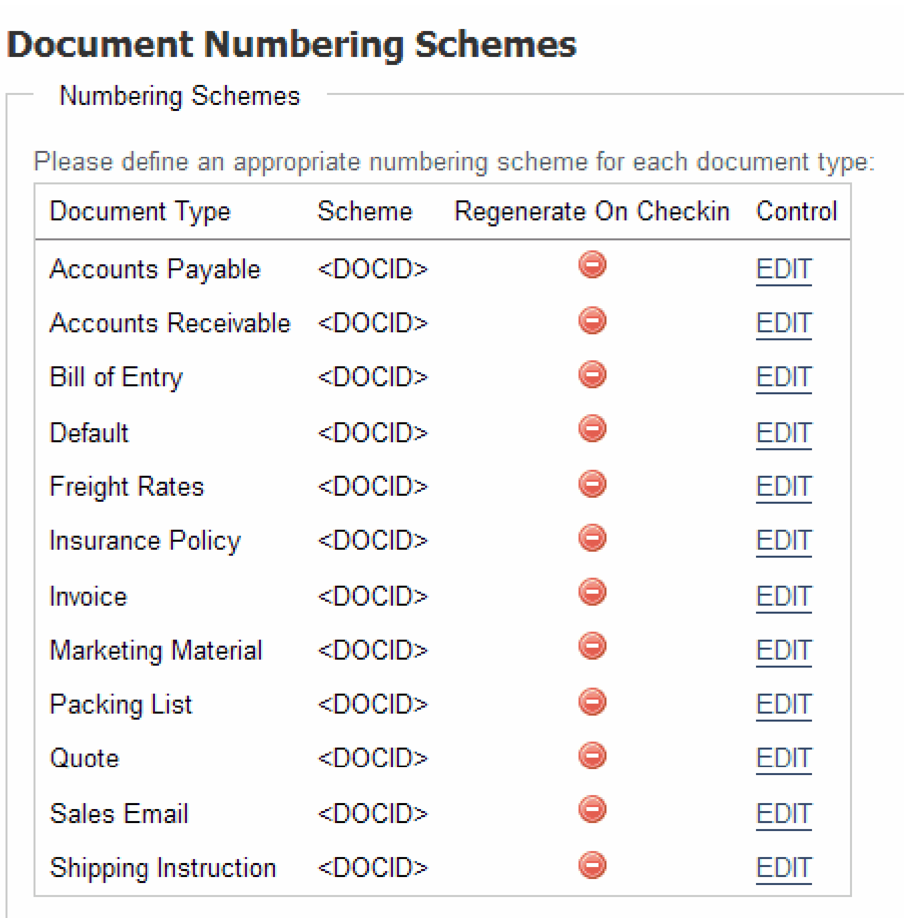
Custom numbering schemes are added, edited, and viewed through KnowledgeTree's web interface, in **Administration - Document Metadata and Workflow Configuration - Document Numbering Schemes**.

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



The Document Numbering Schemes Interface



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 - no schemes defined. You can configure a scheme for each document type

3.3.5.2 Email Document Types

Email document types are used to gather relevant metadata for emails saved from Microsoft Outlook to KnowledgeTree through KnowledgeTree Client Tools for Windows.

Note: *KnowledgeTree Client Tools for Windows allows you to emails and attachments from Microsoft Outlook to KnowledgeTree, and to attach files directly from KnowledgeTree to outgoing email messages. See the KnowledgeTree Client Tools Guide for more information about this KnowledgeTree Commercial client tool.*

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.*

3.3.5.2.1 Viewing / Adding Email Document Types

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

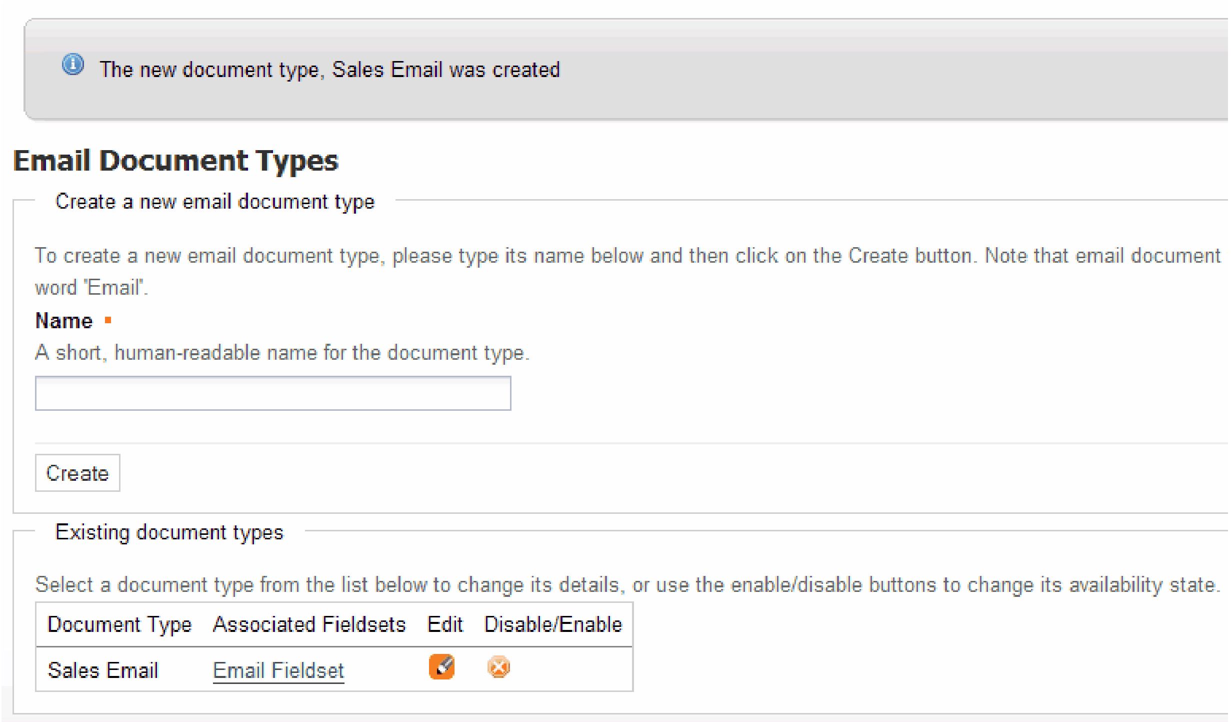
Commercial Editions Only
Note: *This feature is available only in KnowledgeTree Commercial Editions.*

Perform the following steps:

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



3.3.5.3 Document Fieldsets

A **document 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.

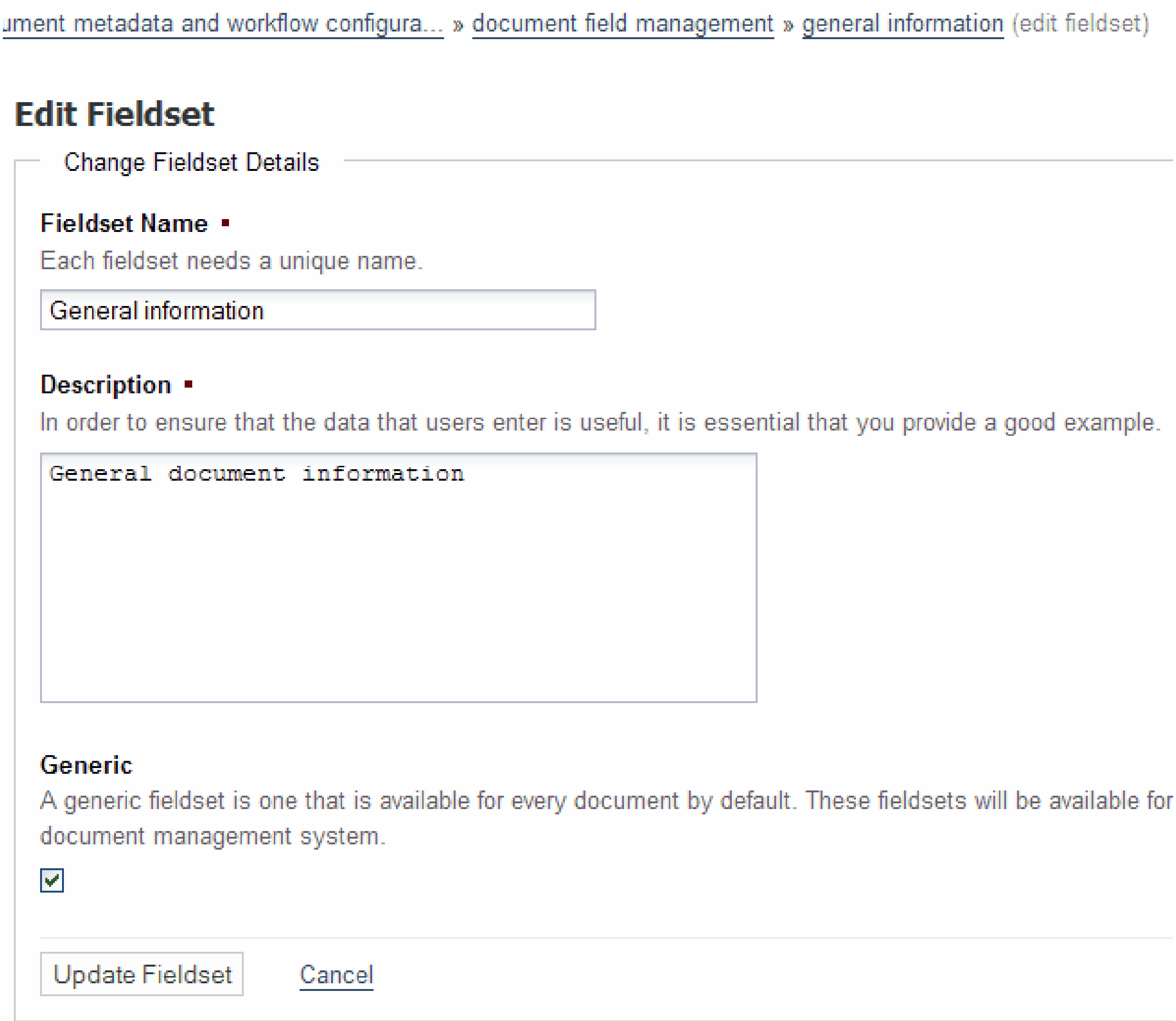
Note: *KnowledgeTree auto-generates an editable system name (namespace) for every fieldset. Plugins use this namespace to call the fieldset, and to control how the fieldset works. For more information on developing Plugins for KnowledgeTree, see the KnowledgeTree Wiki at http://wiki.knowledgetree.com/Plugins*

Figure: The Fieldset configuration Screen, from where you can view, add, edit, and delete fieldsets and their fields
Note: *The* ***System*** *column on this screen is Reserved for Future Development*

Configuring Fieldsets

Fieldsets and fields are added and edited in **Administration - Document Metadata and Workflow Configuration - Document Fieldsets**.

When adding a fieldset, you can define whether the fieldset is generic or non-generic. Generic fieldsets are automatically associated with all document types added to KnowledgeTree. Non-generic fieldsets may only be associated with a single selected document type.



Associating Document Types and Fieldsets

When adding documents, users are required to select the document type, which automatically loads the fieldset and fields associated with the document type, and the user may then add the document metadata for the fields included in the fieldset.

Types of Fieldsets

KnowledgeTree provides two default fieldset types:

- Normal
  A 'normal' fieldset can contain many, dissimilar field types

- Conditional
  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.

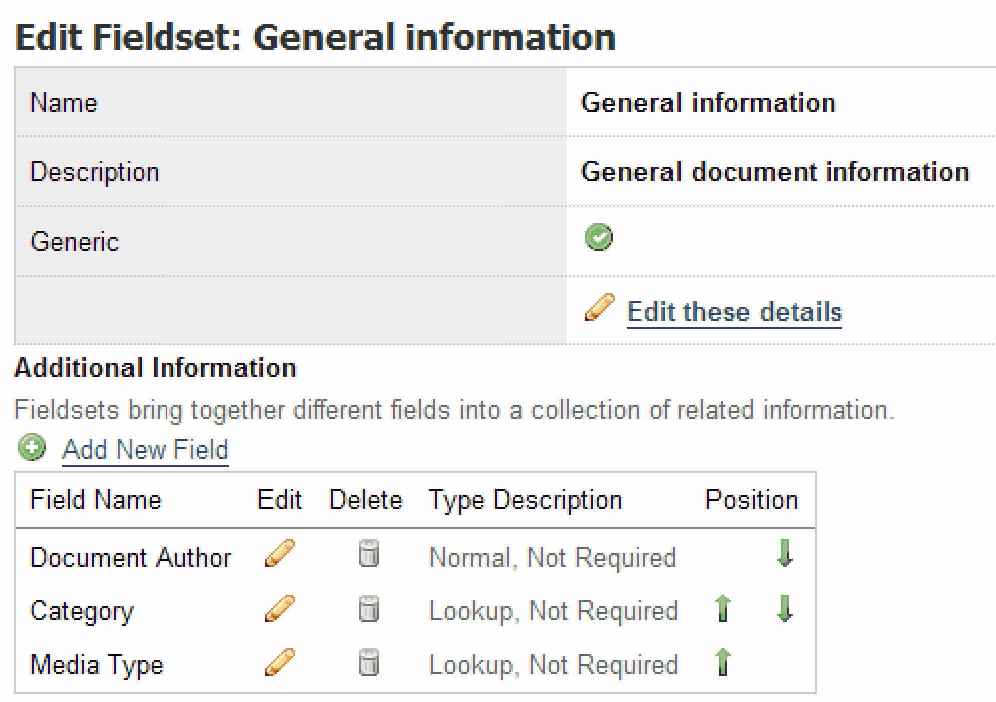


Figure: Edit Fieldset Screen - This is a 'Normal' fieldset, with 3 fields: Document Author, Category, Media Type

3.3.5.3.1 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 **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

Note: *The **System** column on the Document Fieldsets screen is Reserved for Future Development.*

3.3.5.3.2 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 **Administration** - **Document Metadata and Workflow Configuration** - **Document Fieldsets**.
   Note: *The **System** column on the Document Fieldsets screen is reserved for future development.*

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***.

6. **Is this a ...**
   - **Conditional fieldset?** Go to Setting up Conditional Fieldsets to complete this procedure.
   - **Normal fieldset?** Go to Adding Fields to complete this procedure.

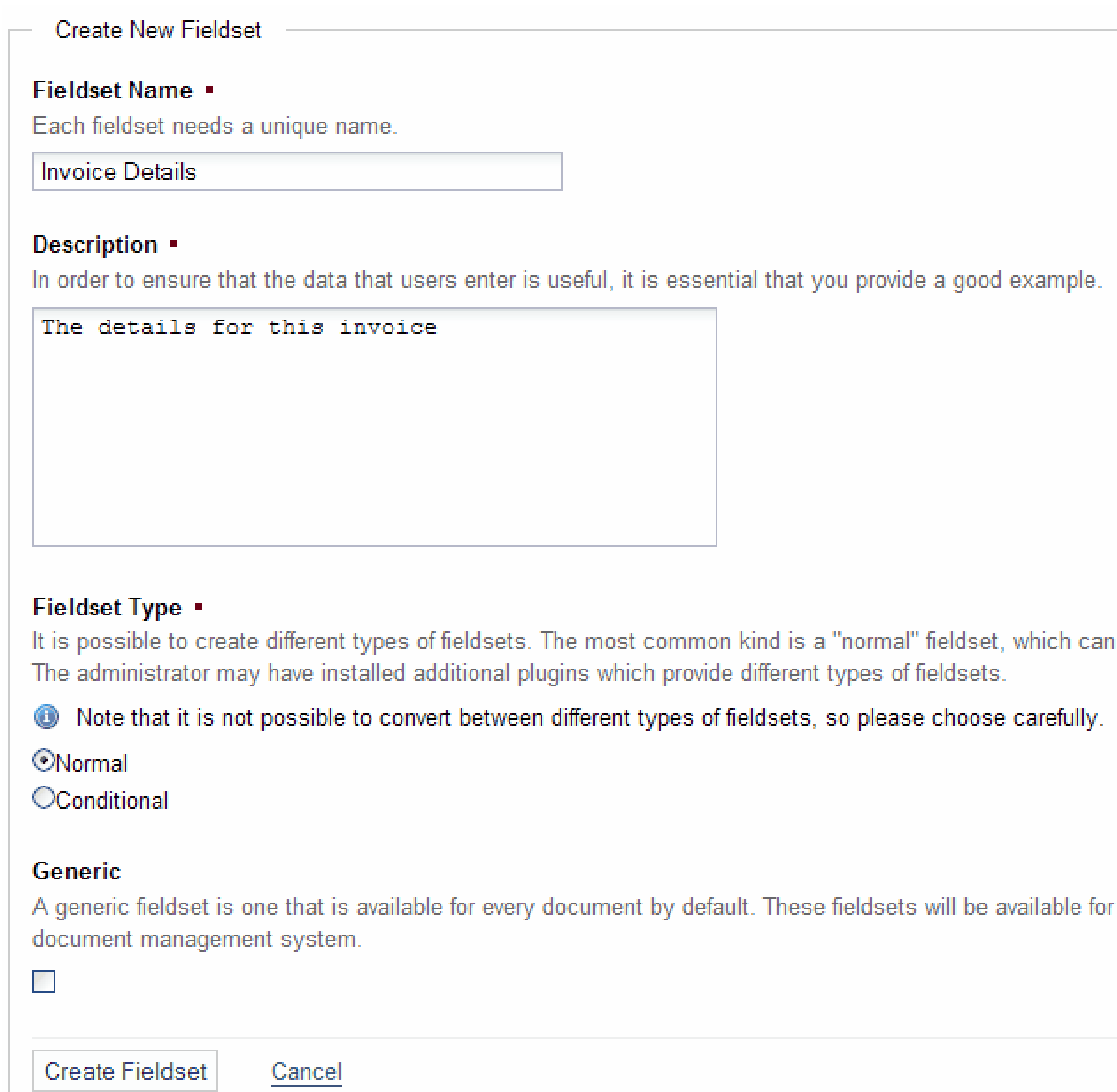


Figure: Adding a new fieldset

3.3.5.3.3 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 **Administration** - **Document Metadata and Workflow Configuration** - **Document Fieldsets**.

__Note:__ The __System__ column on the Document Fieldsets screen is Reserved for Future Development.

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 fieldset, you can also configure the fieldset (order fields and set up fieldset rules).

3.3.5.3.4 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 ***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.

3.3.5.3.5 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.*

3.3.5.3.5.1 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 **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 type of field from the **Field Type** radio button.
   - **Normal (String) -** Use the normal field to store small amounts of text
   - **Lookup** - Use the lookup field when the user needs to select a single item from a pre-defined list
   - **Tree** - The tree field functions in the same way as a lookup field, except that the options are arranged hierarchically. This can be helpful if there are many options to choose from
   - **Large Text** - Use a large text field to store large amounts of text, such as descriptions
   - **Date** - The date field provides a standardized field for storing dates
   - **Multiselect** - The multiselect field functions in the same way as a lookup field, except that the user can choose more than one option. It comes in two flavours, as a list, and as a set of checkboxes

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***.

8. The **Manage Field** page is displayed. Here you can change details for the field.

9. Additional options can be set for **lookup** Setting Lookup Fields, **tree** Setting Tree Fields, **large text**, and **multiselect** fields. Click **Update Field** to save your changes.

10. To add another field, click the name of the fieldset in the bread-crumb navigation at the top of the page.

3.3.5.3.5.2 Defining Lookup Fields

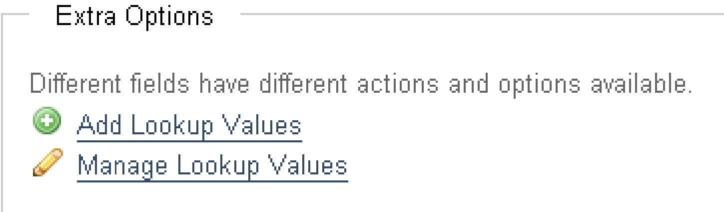
This procedure sets values for a **Lookup** field in a fieldset.

Perform the following steps:

1. Follow the instructions on View existing / adding new fields to add a lookup field.

2. From the **Manage Field** page click ***Add Lookup Values*** in the **Extra Options** section

to open the **Add Lookup Values** page.



3. 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** page.

4. In the **Extra Options** section, click ***Manage Lookup Values*** to open the **Manage Lookups** page.

5. **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***.

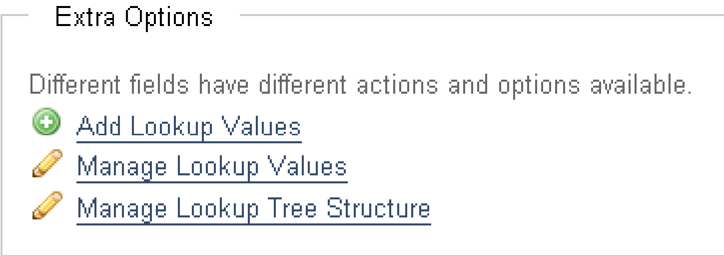
3.3.5.3.5.3 Defining Tree Fields

This procedure sets values for 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. Follow the instructions on View existing / adding new fields to add a tree field.

2. From the **Manage Field** page click **Add Lookup Values** in the **Extra Options** section to open the **Add Lookup Values** page.



3. 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** page.
4. Click **Manage Lookup Values** to open the **Manage Lookups** page.

5. **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**.

6. Click the fieldset name in the bread-crumb navigation at the top of the page to return to the **Manage Field** page.

7. Click **Manage Lookup Tree Structure** to open the **Edit Lookup Tree** page.

8. **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.*

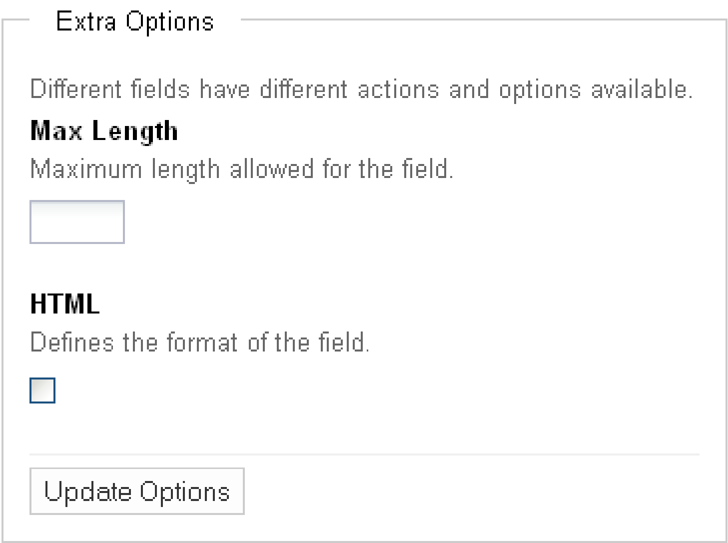
3.3.5.3.5.4 Defining Large Text Fields

This procedure sets values for a **Large Text** field in a fieldset.

Perform the following steps:

1. Follow the instructions on [View existing / adding new fields]() to add a large text field.

2. From the **Manage Field** page in the **Extra Options** section, type a value in the **Max Length** text box to limit the number of characters the field can accept.



3. Check the **HTML** checkbox to ...

4. Click **Update Options**.

5. The field is updated.

3.3.5.3.5.5 Defining Multiselect Fields

This procedure sets values for a **Multiselect** field in a fieldset.

Perform the following steps:

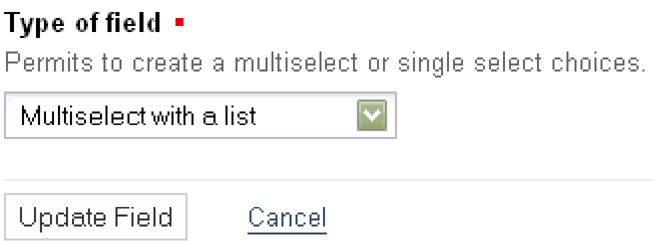
1. Follow the instructions on [View existing / adding new fields]() to add a multiselect field.

2. Follow the instructions on [Defining Lookup Fields]() to add lookup values to the multiselect field.

3. From the **Manage Field** page you can select the type of multiselect field you want to use.

4. From the Type of field drop-down list box select either

- Multiselect with a list
- Multiselect with checkboxes



5. Click **Update Options**.

6. The field is updated.

3.3.5.3.5.6 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 **Administration**; then, click **Document Fieldsets** to open the **Document Fieldsets** management page.
Note: The System column on the Document Fieldsets screen is Reserved for Future Development.

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** 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** page. Make the required changes; then, click **Update Field**.

   - **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.

3.3.5.4 Link Type Management

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'.

3.3.5.4.1 Configuring Document Links

This procedure displays, edits, and deletes existing document links, and adds new document links.

Perform the following steps:

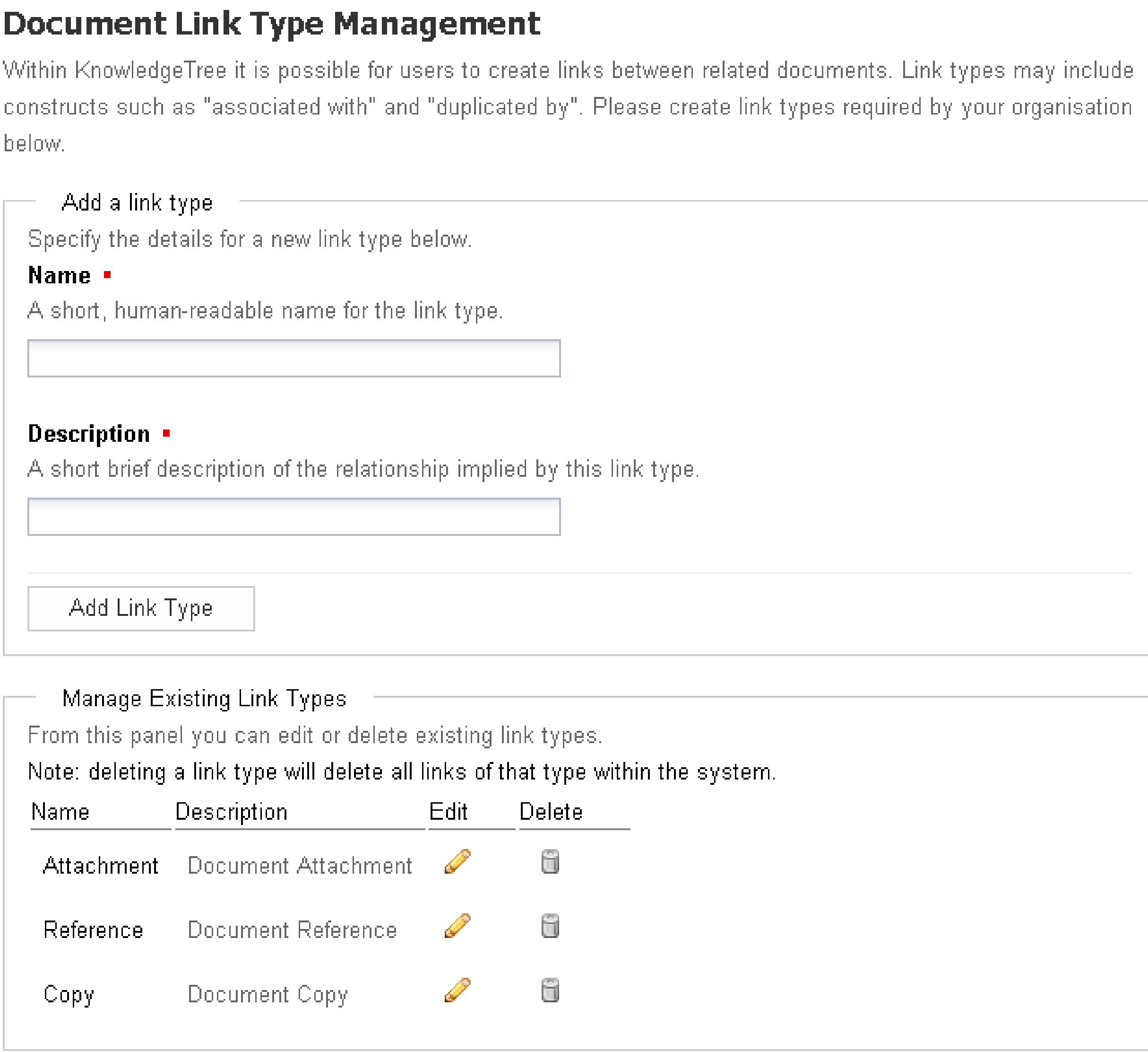
1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **Administration - Document Metadata and Workflow Configuration - Link Type Management** to open the **Document Link Type Management** page.

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.



Document Links

3.3.5.5 Alerts by Document Type

Document Type Alerts are alerts that are defined for all documents of a specified document type.

Note: *'Document Type Alerts' are provided as a plugin in KnowledgeTree Commercial Editions version 3.6.1 and above.*

Document Type Alerts are date-based, user-defined, system-generated notifications that are automatically sent to one or more users, groups and/or roles (as defined in the alert), when some action (as specified in the alert) is required on a document of a certain type (as specified in the alert).

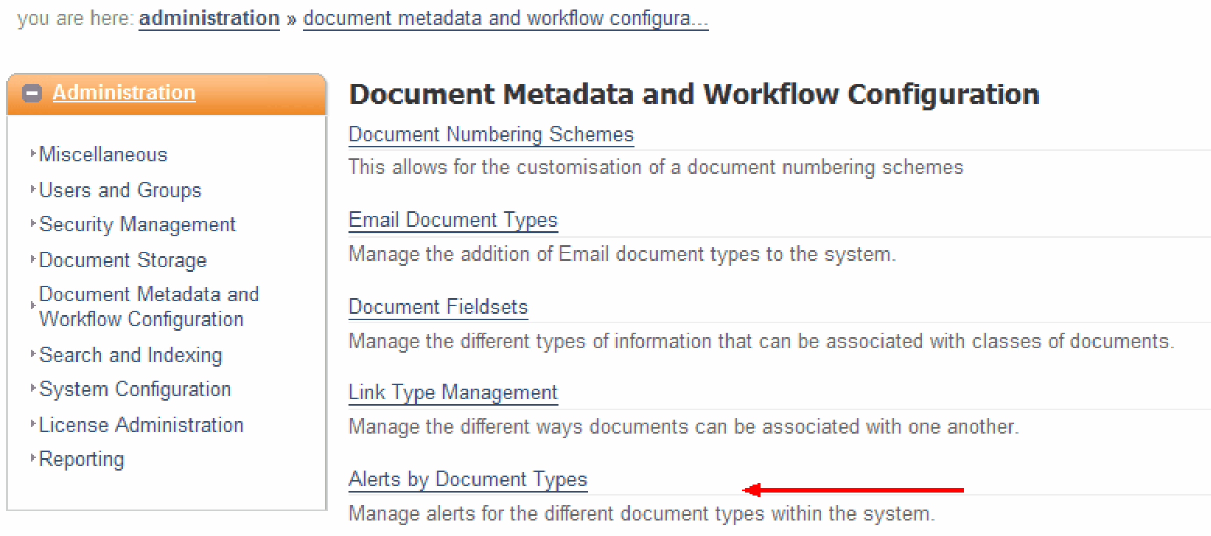


Figure: Alerts by Document Types - configuration page

Note: *The time alerts are triggered are defined by your server time zone (server = utc time), which is set in php.ini. You can manage Document Alerts as a scheduled background task through the KnowledgeTree Task Scheduler.*

The system administrator may define an unlimited number of Document Type Alerts on a document type. Users may view a 'read-only' list of existing Alerts on the document's Existing Alerts list, but only the system administrator may add, edit, and delete Document Type Alerts.

Figure: View existing document type alerts (System Alerts) through Browse Documents - [document] - Alerts

When adding a Document Type Alert, the system administrator defines ...

- whether the Alert applies to existing documents and to new documents of the relevant document type, or only to new documents added to the system
- a re-occurence cycle - daily, weekly, monthly, or yearly

- whether the Alert is reset on a document on check-in
- additional recipients - users, groups, or roles. By default, Document Type Alerts notify only the system administrator.

When a document's document type is changed, any Alerts associated with the old document type are removed and alerts associated with the new document type are applied to the document.

⊟ How are Document Type Alert recipients notified when an alert is triggered?
When an alert is triggered, an email is sent to the alert recipients. Recipients are also notified through their 'Items Requiring Your Attention' dashlet on the KnowledgeTree Dashboard.

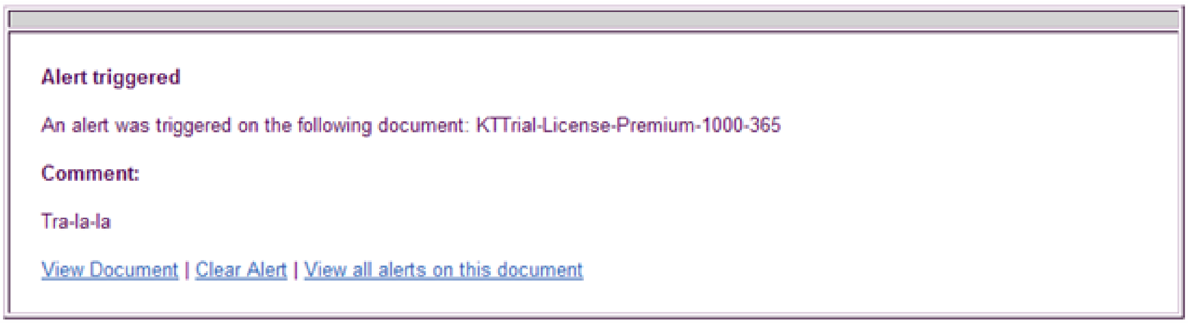


Figure: Document Type Alert - example of an email notification

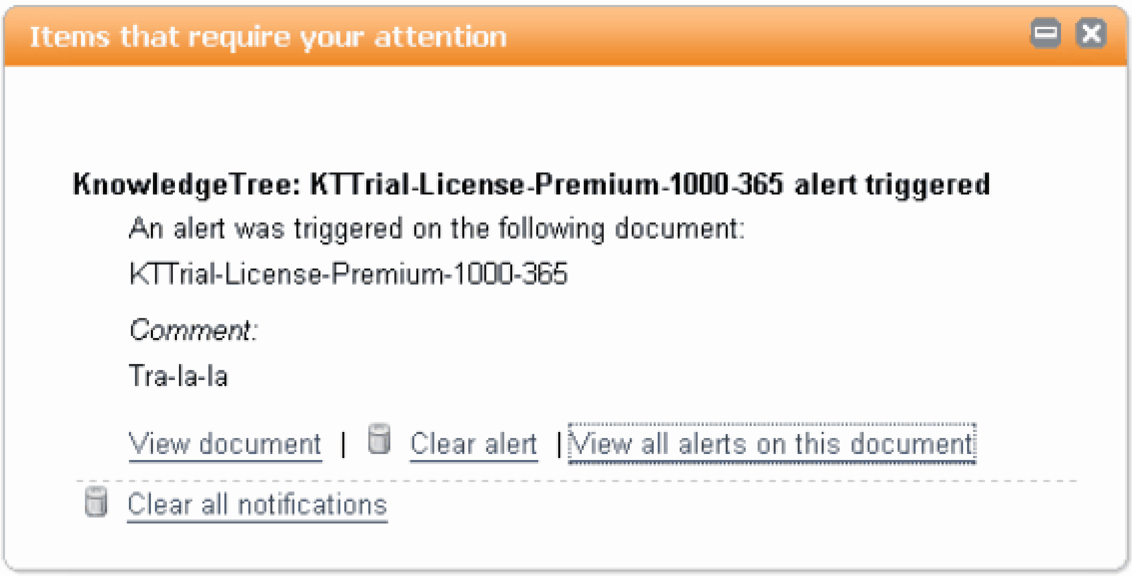


Figure: Document Type Alert - notification on the KnowledgeTree Dashboard

3.3.5.5.1 Configuring Alerts by Document Type

This procedure configures an alert by document type (Document Type Alert).

Perform the following steps:

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

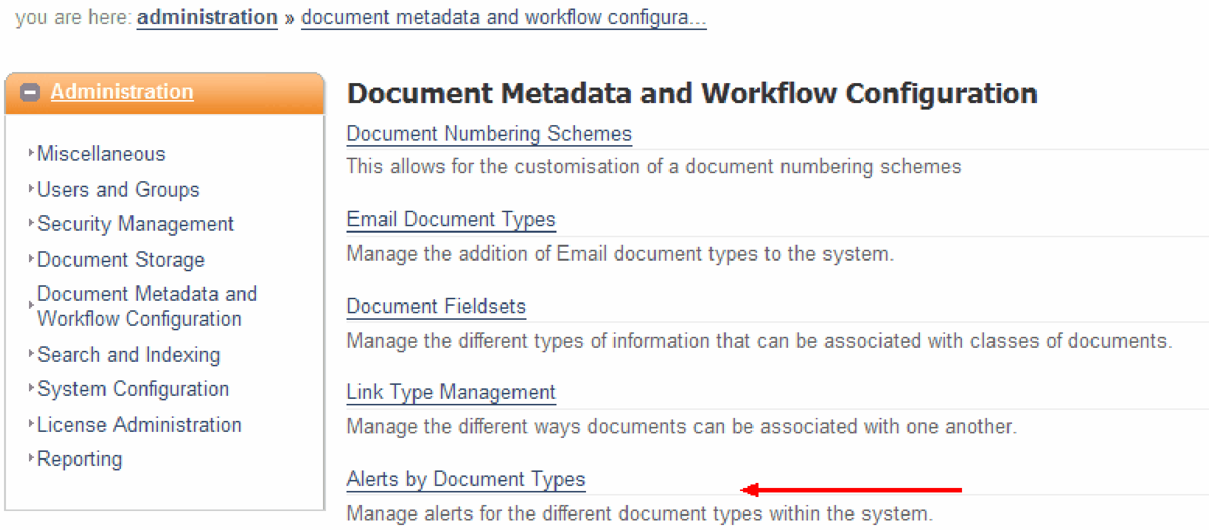
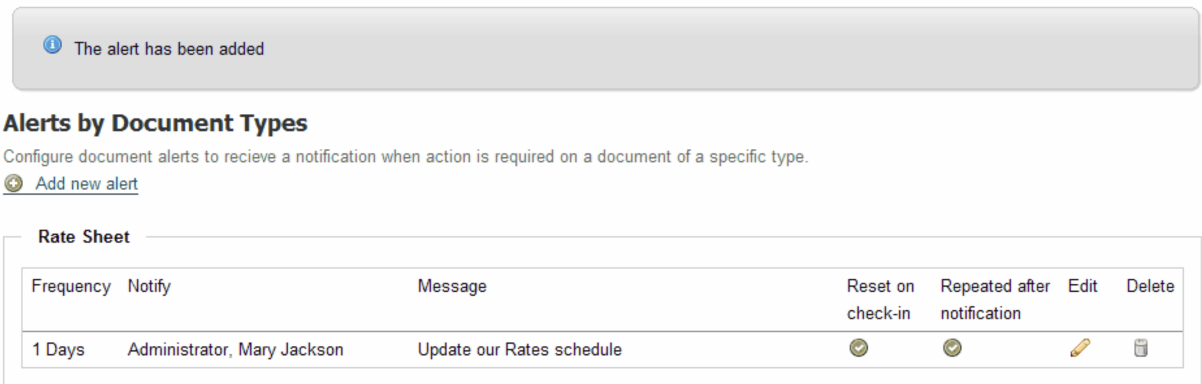


Figure: Alerts by Document Types - configuration page

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

- **view existing document type alerts?** Existing alerts display on the page (if any are configured for your system).



- **add a new Document Type Alert?** Click ***Add new alert***. Go to step 3.

- **edit an existing Document Type Alert?** Locate the relevant Alert on the page; then, click the ***Edit*** icon to open the editing screen. Make the changes you require; then, click ***OK***.

- **delete an existing Document Type Alert?** Locate the relevant Alert on the page; then, click the ***Delete*** icon.

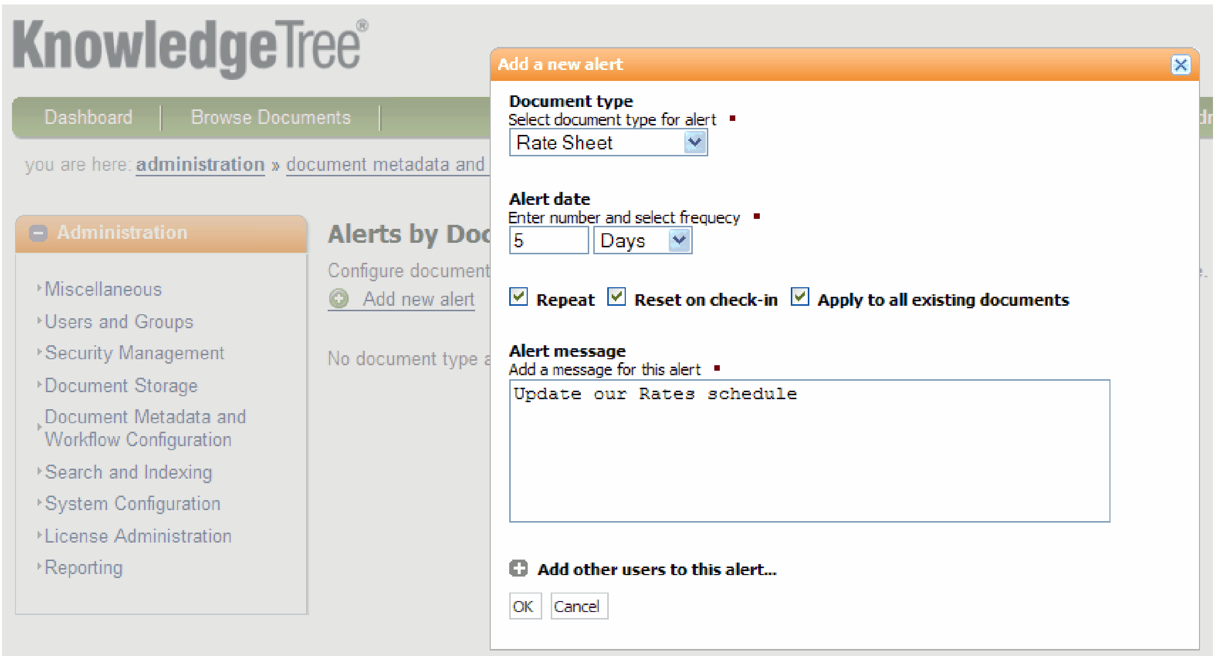
- **enable or disable the setting to reset the Alert on a document when the document is checked-in?** Click the icon in the **Reset on check-in** column for the relevant Alert. A green icon in this column indicates that this setting is *Enabled*. A red icon in this column indicates that this setting is *Disabled*.

- **enable or disable the setting to allow the Alert to re-occur?** Click the icon in the **Repeated after notification** column for the relevant Alert. A green icon in this column indicates that this setting is *Enabled*. A red icon in this column indicates that this setting is *Disabled*.

- **manage document alerts as a scheduled background task?** Go to the KnowledgeTree Task Scheduler, where you can view and edit the frequency at which this task runs (e.g. daily), the next run time, the previous run time, and the time taken to complete this task. For these options, you can change the frequency, set the task to run on the next iteration, and enable/disable the task.

3. To add a new Alert, configure settings on the **Add a new alert** screen; then, when you're done, click ***OK***. The following options are available:
   - select a document type
   - define a time period - a number of days, weeks, months, or years
   - define whether the Alert loops in a re-occurring pattern
   - define whether to reset the Alert on a document when the document is checked-in
   - define whether to apply this Alert to all existing documents of this document type and to new documents, or only to new documents
   - add a message for the Alert
   - select recipients for the notification on this Alert

   Note: *By default, Document Type Alerts trigger notifications that are sent to the system administrator. You can include more recipients when adding and editing a Document Type Alert.*



3.3.5.6 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.*

3.3.5.6.1 Viewing / Editing / Adding Document Types

This procedure displays and edits existing 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 **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.*

3.3.5.6.2 Enabling / Disabling Document Types

This procedure enables and disables document types.

Perform the following steps:

1. Use your administrator login credentials to open **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.

3.3.5.6.3 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 **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.*

3.3.5.7 Automatic Workflow Assignments

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.

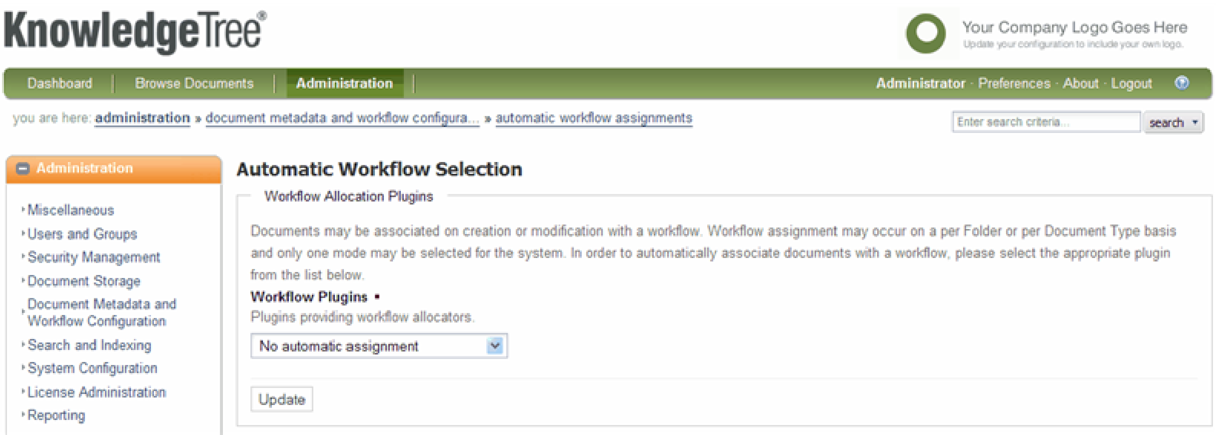


Figure: Automatic Workflow Assignment - main page

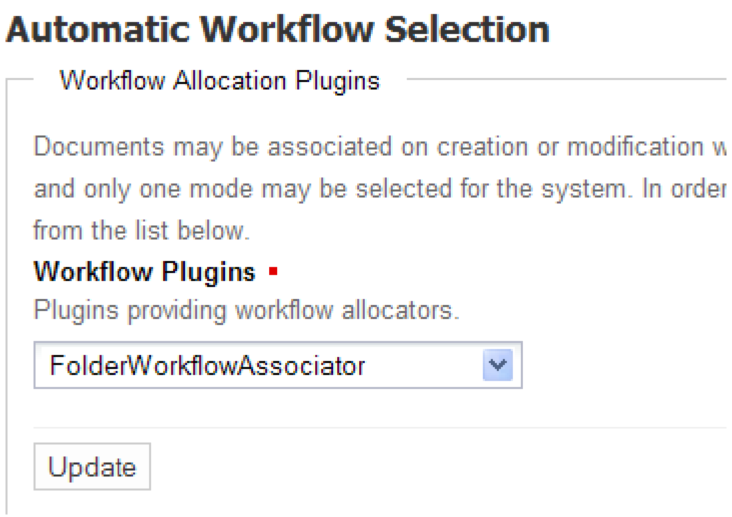


Figure: Workflow assigned by Folder

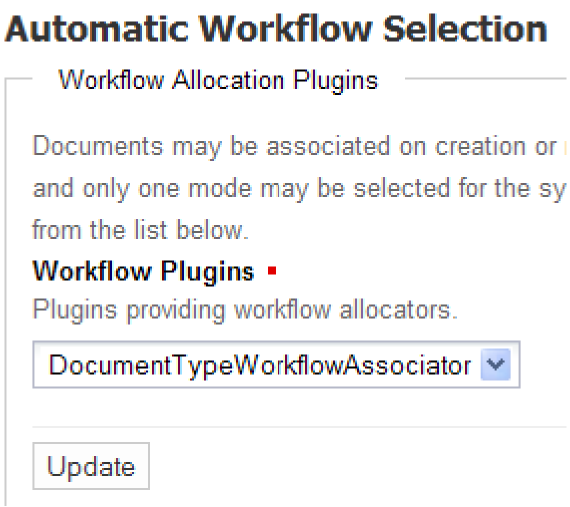


Figure: Workflow assigned by document type

3.3.5.7.1 Enabling / Disabling Automatic Assignment of Workflows

This procedure enables and disables automatic workflow assignment.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, open **Administration - Document Metadata and Workflow Configuration** - **Automatic Workflow Assignments** to open the Automatic Workflow Selection page.

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***.

3.3.5.8 Workflows

This chapter provides information and instructions for working with KnowledgeTree Workflows.

Note: *Please see the topic, Introduction to KnowledgeTree Workflows, (in this Manual) to learn more about the Workflows concept KnowledgeTree.*

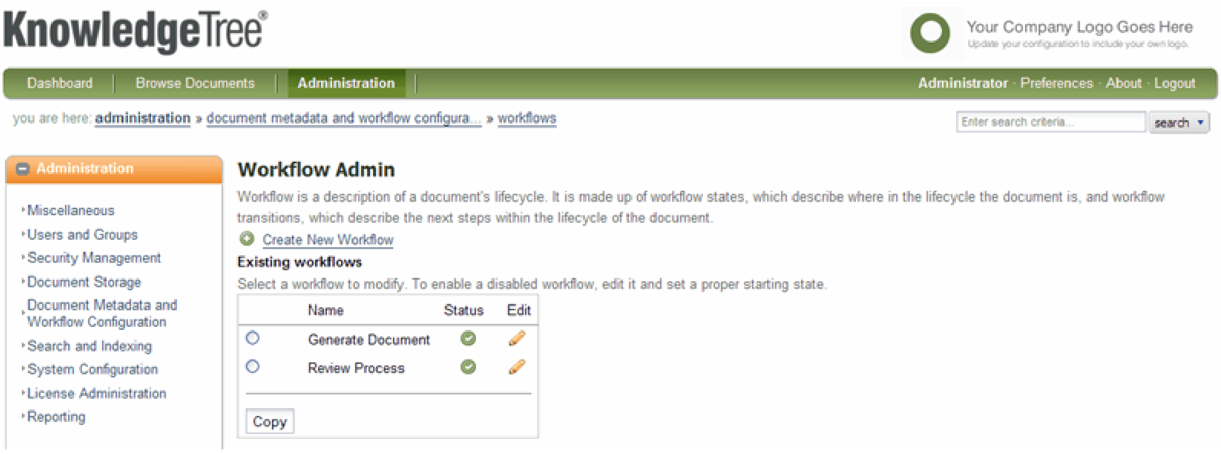


Figure: Document Metadata and Workflow - Workflows (main page)

3.3.5.8.1 How to set up a Workflow

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,

Step 1: 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.

Step 2: 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.

Step 3: 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.*

3.3.5.8.1.1 Getting Started - Adding the workflow to KnowledgeTree

If you have planned your workflow, you can add it to KnowledgeTree.

1. Add the workflow to KnowledgeTree:
   - add a workflow name
   - add the states
   - add the transitions
   - connect the 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)- here you define what happens after the transition occurs (e.g. perhaps the document moves to a particular folder)

3.3.5.8.1.2 Working with existing workflows

Once you have added and configured your KnowledgeTree workflows, you may want to:

- 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

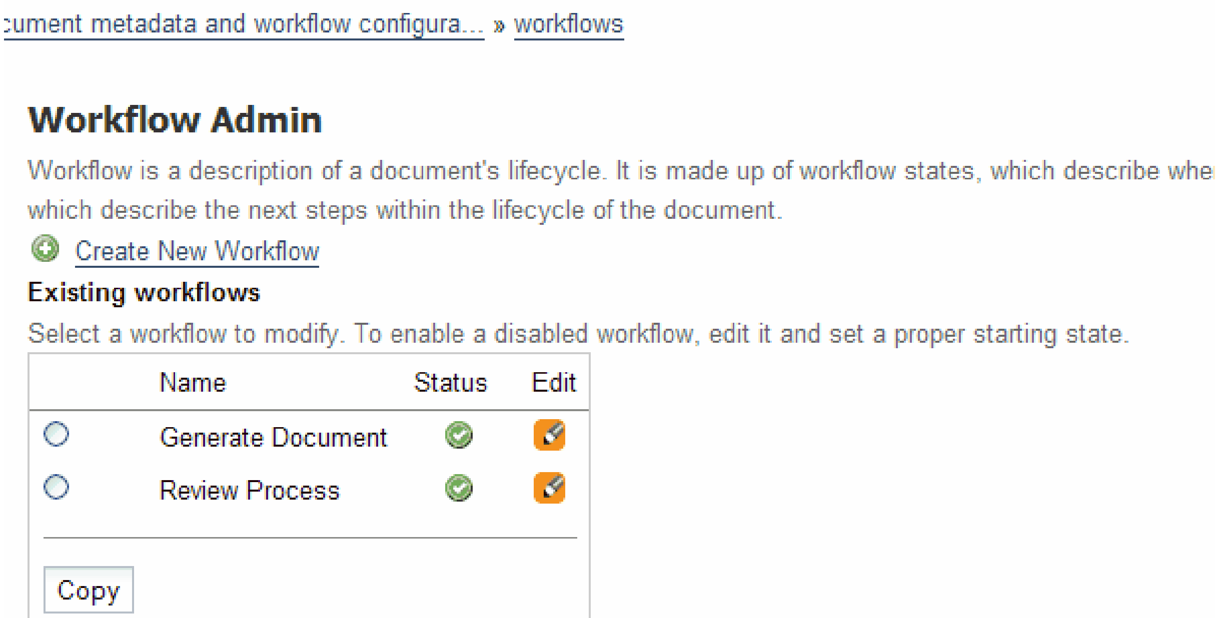
3.3.5.8.2 Adding Workflows

This procedure adds a new workflow.

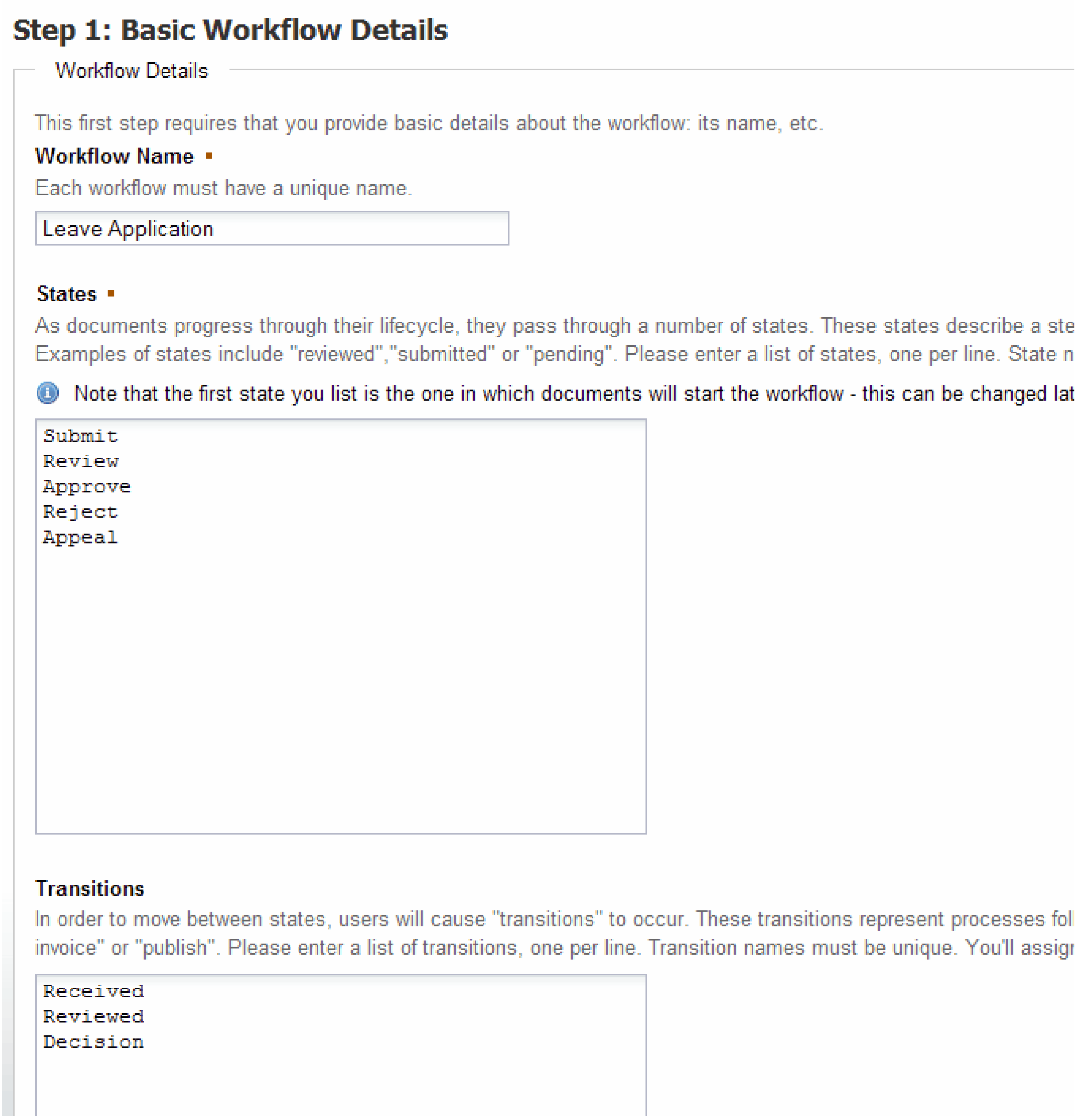
Note: *You can create a brand new workflow, or copy, then edit, the settings of an existing workflow to create a new workflow. See Also: Copying a Workflow.*

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 **Administration - Document Metadata and Workflow Configuration - Workflows** to open the **Workflow Admin** page.

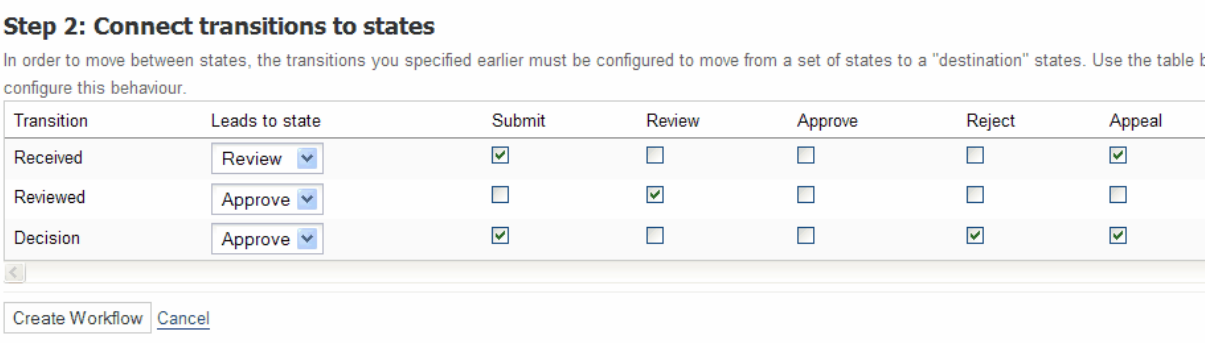


2. Click ***Create New Workflow***.
3. Define basic workflow details:
 3.1. Define a workflow name in the **Workflow Name** field.
 3.2. Define workflow *States* in the **States** field - add unique state names, one per line.
 Note: *By default, the first state listed in this field becomes the starting state.*
  3.2.1. Define workflow *Transitions* in the **Transitions** field - add unique transition names, one per line.



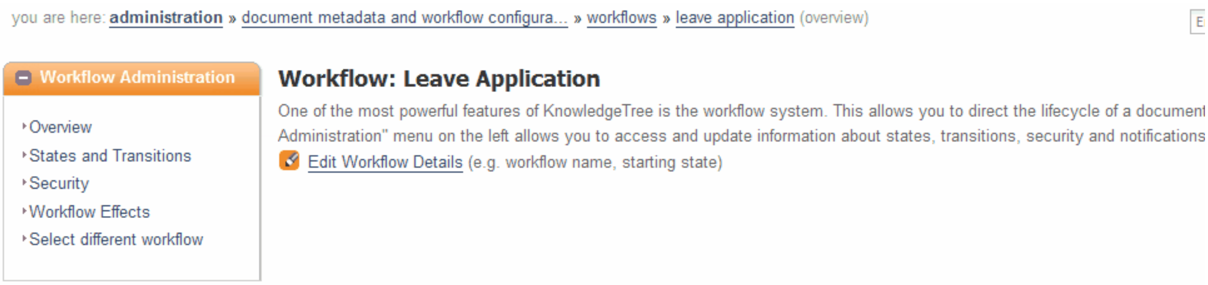
 3.3. Click ***Next***.

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.

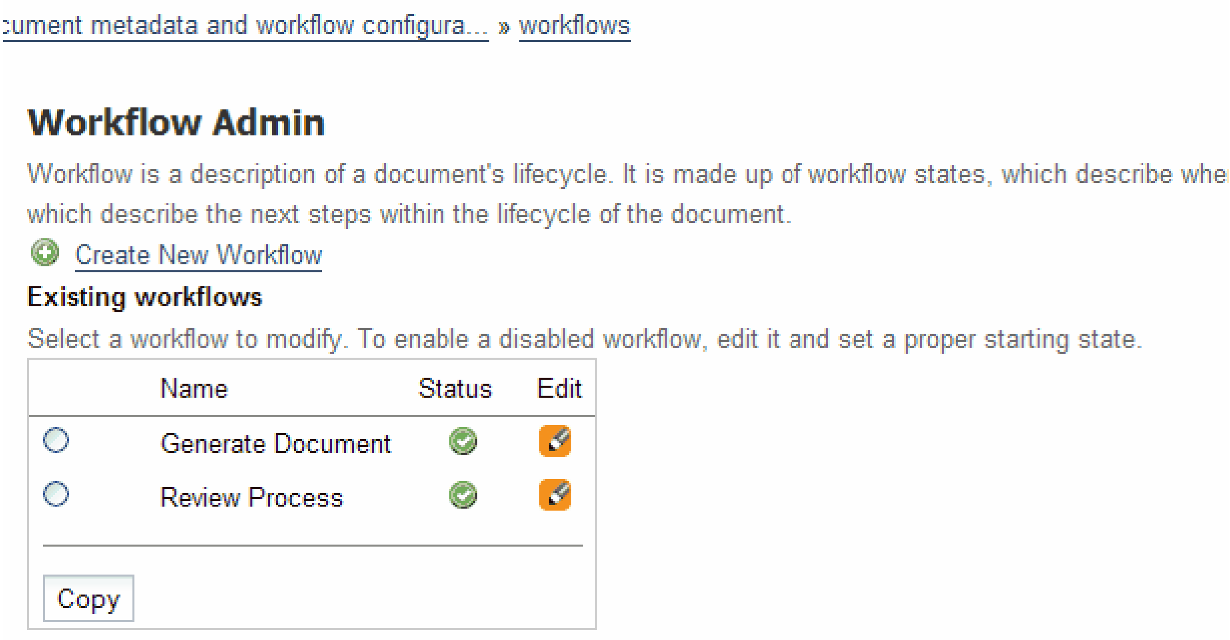
3.3.5.8.3 Configuring Security by Workflow State

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.

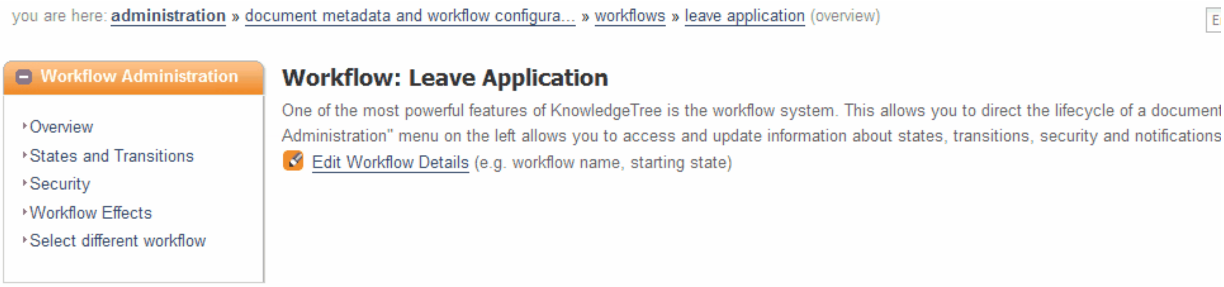
Note: *Permissions configured through workflow states override folder permissions.*

Perform the following steps:

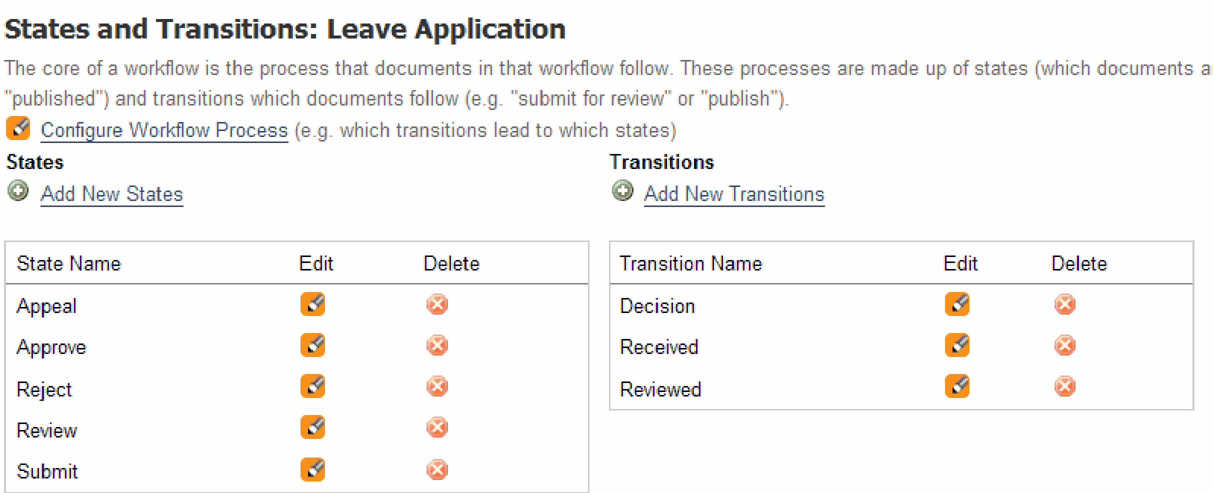
1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **Administration - Document Metadata and Workflow Configuration - Workflows** to open the **Workflow Admin** page.



2. In the **Existing workflows** section, click the ***Edit*** icon for the relevant workflow to open the **Workflow: [workflow name]** page.

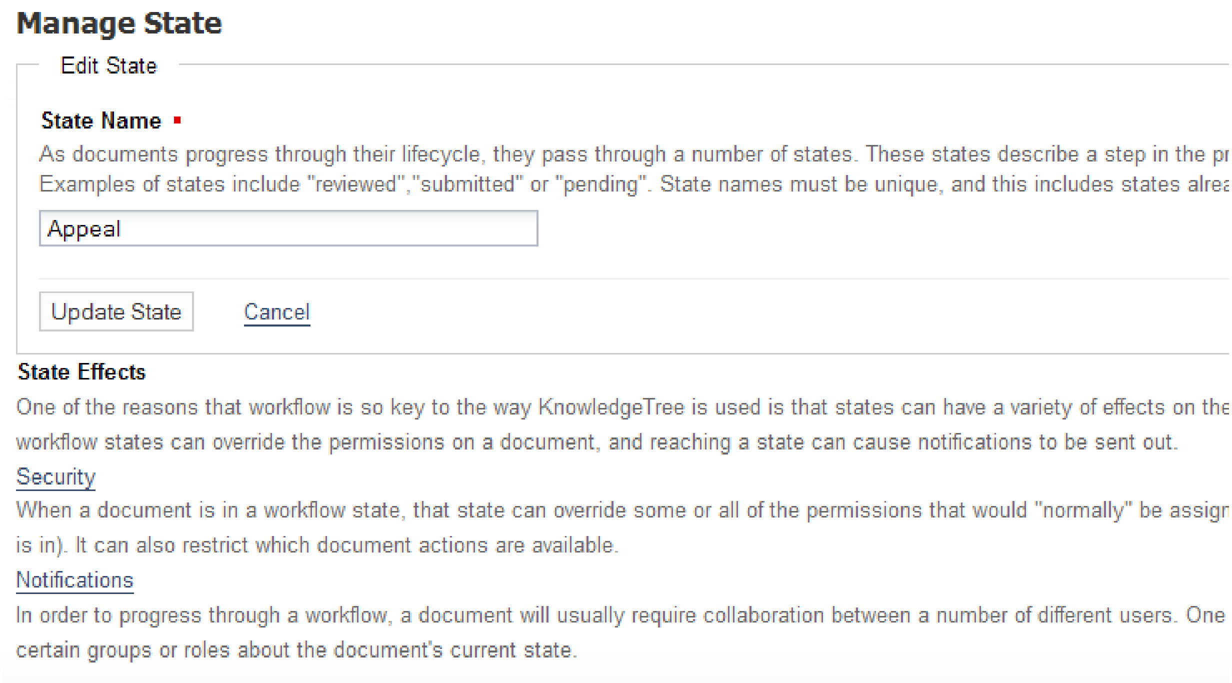


3. In the **Workflow Administration** menu, click ***States and Transitions***.

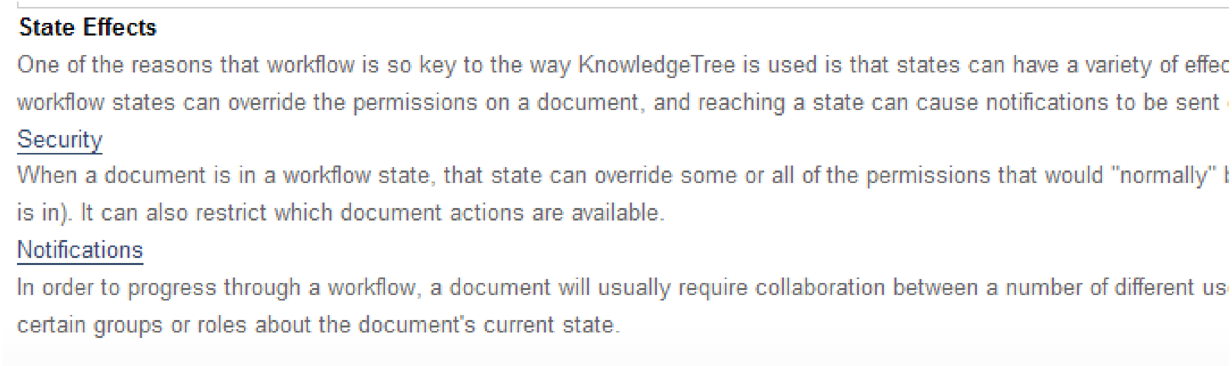


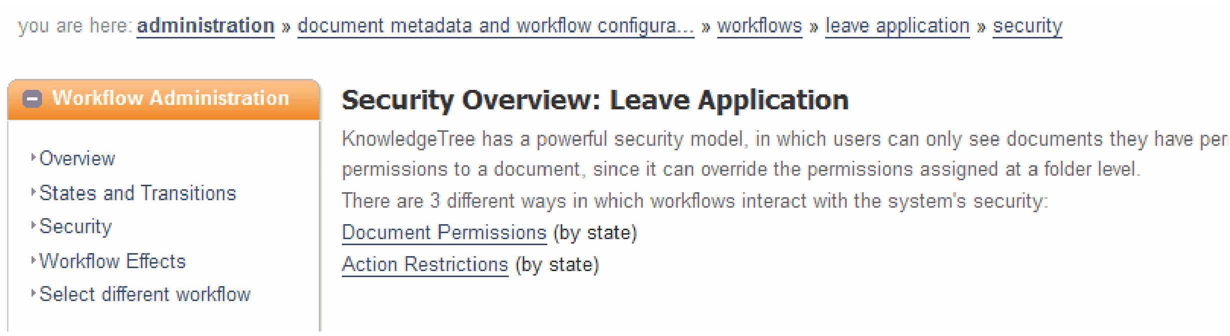
4. View the list of states in the table; then, for the relevant state where you need to

configure permissions, click the ***Edit*** icon to open the **Manage State** page.



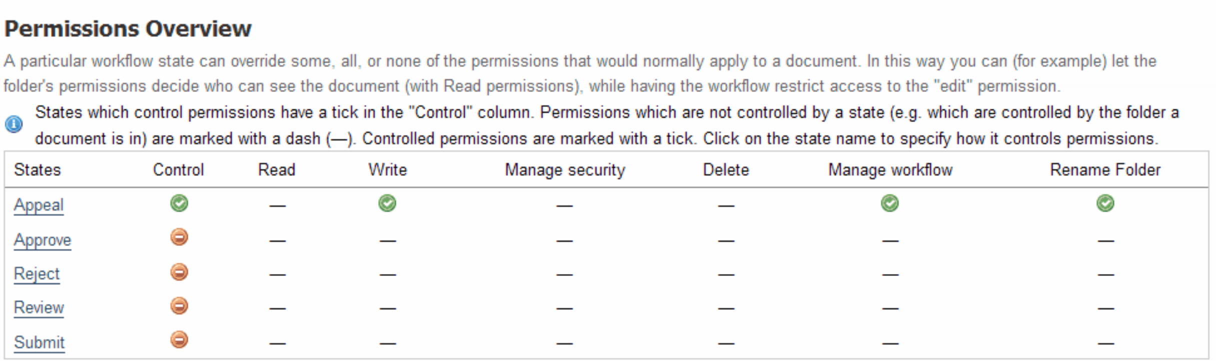
5. In the **State Effects** section, click ***Security*** to open the **Security Overview: [workflow name]** page.





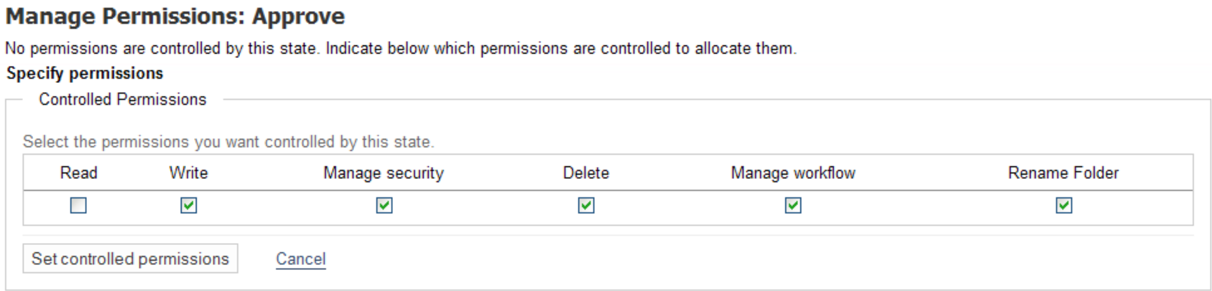
6. The following security settings are configurable for the workflow states:
   - **View permissions controlled by state.** Click ***Document Permissions***. The table displays how permissions are controlled by each state in the workflow (if already

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***.



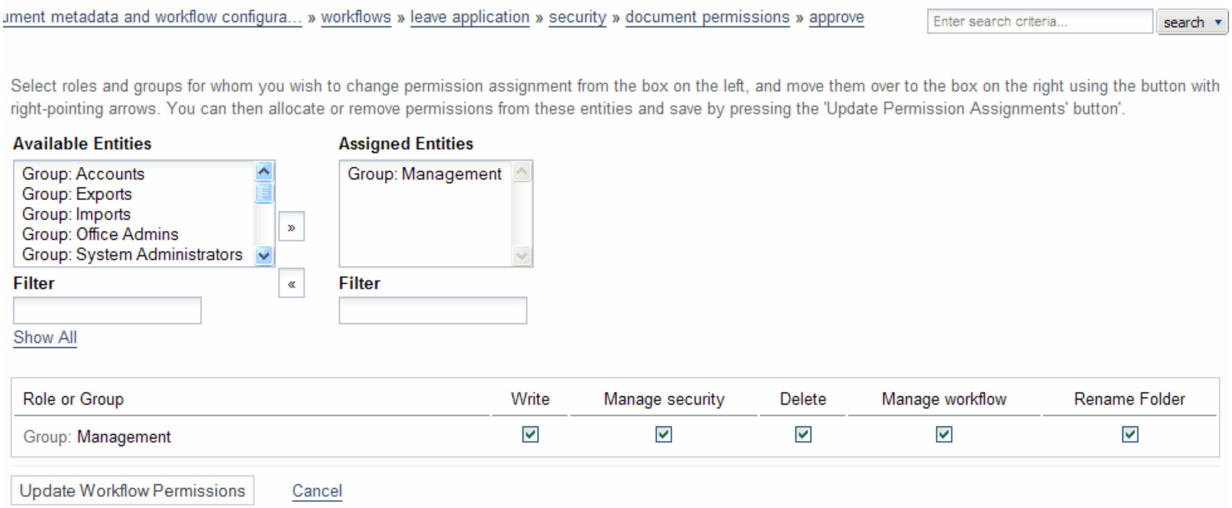
Assign permissions by state

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

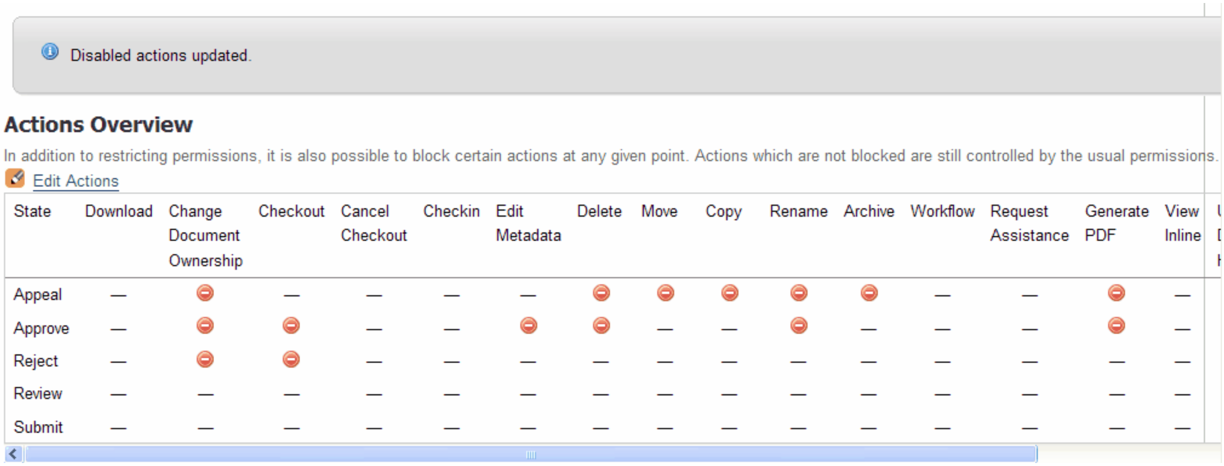
Assigned Entities field to the **Available Entities** field. Roles and groups added to the **Assigned Entities** field are displayed in the table at the bottom of this page. For each role and group where state controlled permissions are allocated, select the check box - one or more - to define the permission 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

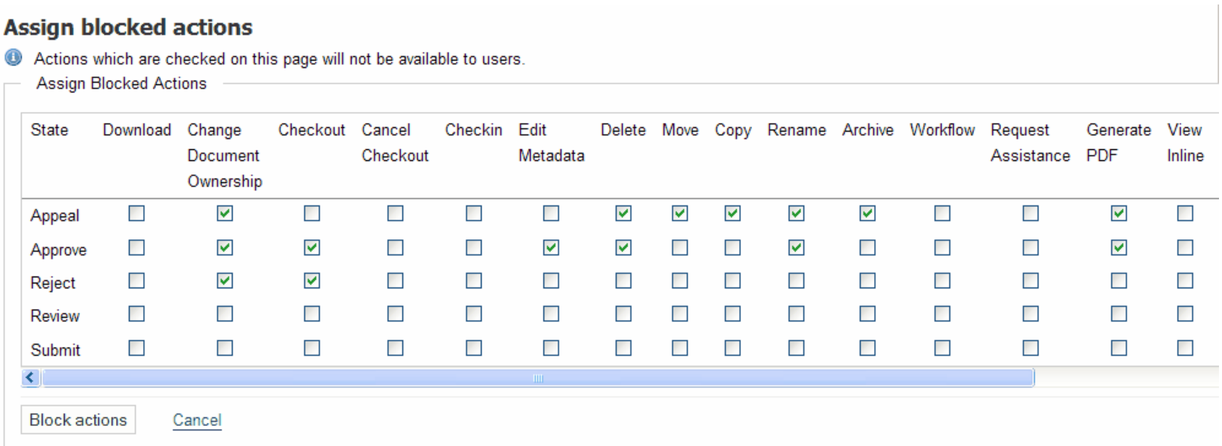
- **View document actions blocked by state.** Click ***Action Restrictions***. A table on the **Actions Overview** page lists the available document actions in the system, and it lists the states in this workflow; blocked actions are unavailable on a document that reaches this state in the workflow.



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**.


Assign blocked actions

Actions which are checked on this page will not be available to users.

Assign Blocked 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	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐

Block actions Cancel

Assign blocked actions

3.3.5.8.4 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:

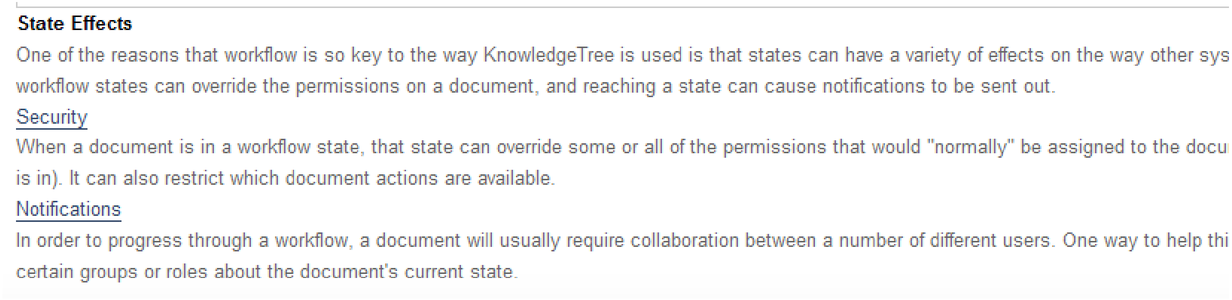
1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **Administration - Document Metadata and Workflow Configuration - Workflows** to open the **Workflow Admin** page.

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.



State Effects

One of the reasons that workflow is so key to the way KnowledgeTree is used is that states can have a variety of effects on the way other sys
workflow states can override the permissions on a document, and reaching a state can cause notifications to be sent out.

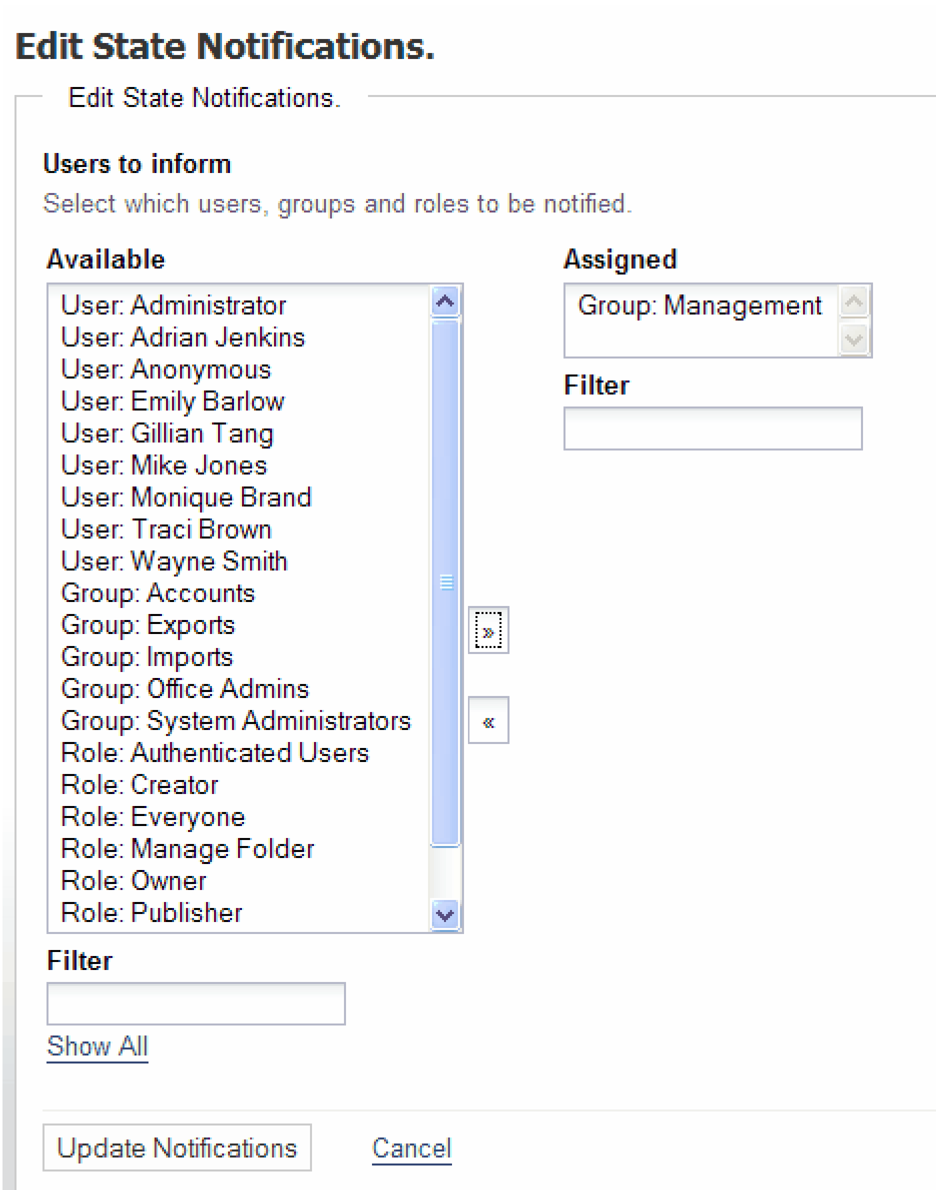
Security

When a document is in a workflow state, that state can override some or all of the permissions that would "normally" be assigned to the docu
is in). It can also restrict which document actions are available.

Notifications

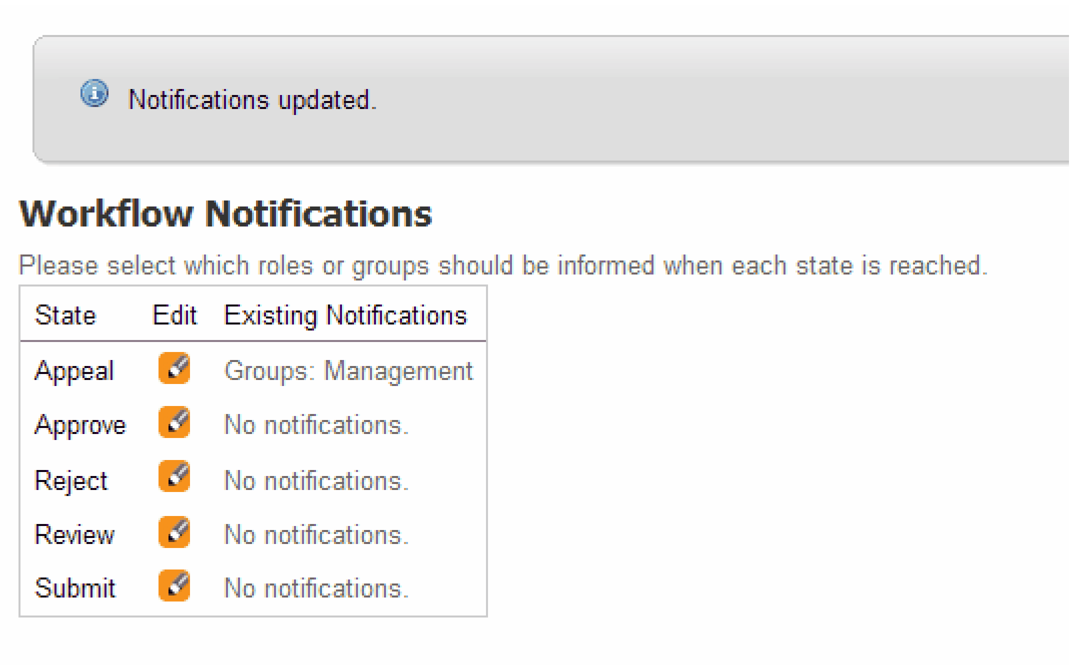
In order to progress through a workflow, a document will usually require collaboration between a number of different users. One way to help thi
certain groups or roles about the document's current state.

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.

3.3.5.8.5 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.

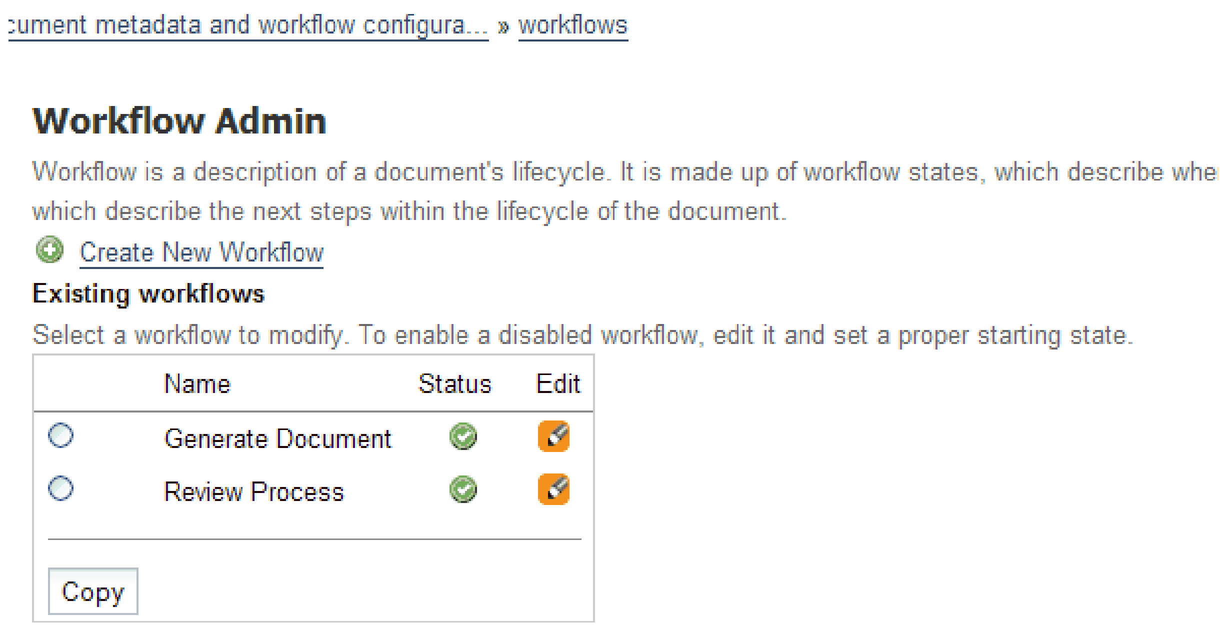
A 'Guard Trigger' may include required permissions, or only certain roles or groups that are allowed to perform the transition, or some action that occurs at the transition, such as preventing the document from being checked out at a certain state.

KnowledgeTree provides the following guard triggers for configuring Transitions in a workflow:

- Permission restrictions
- Role restrictions
- Group restrictions
- Conditional restrictions
- Checkout Guard

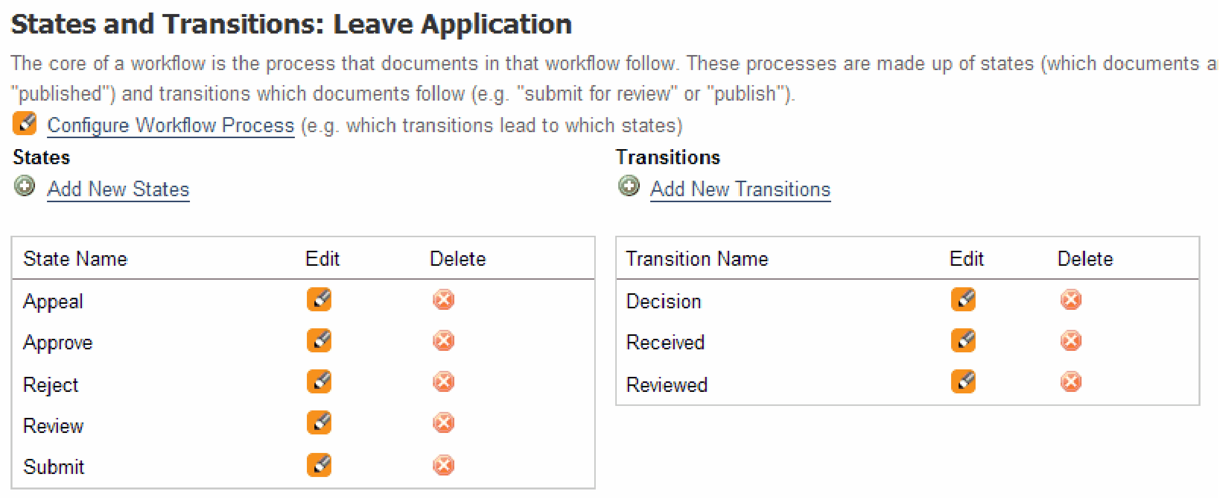
Perform the following steps:

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

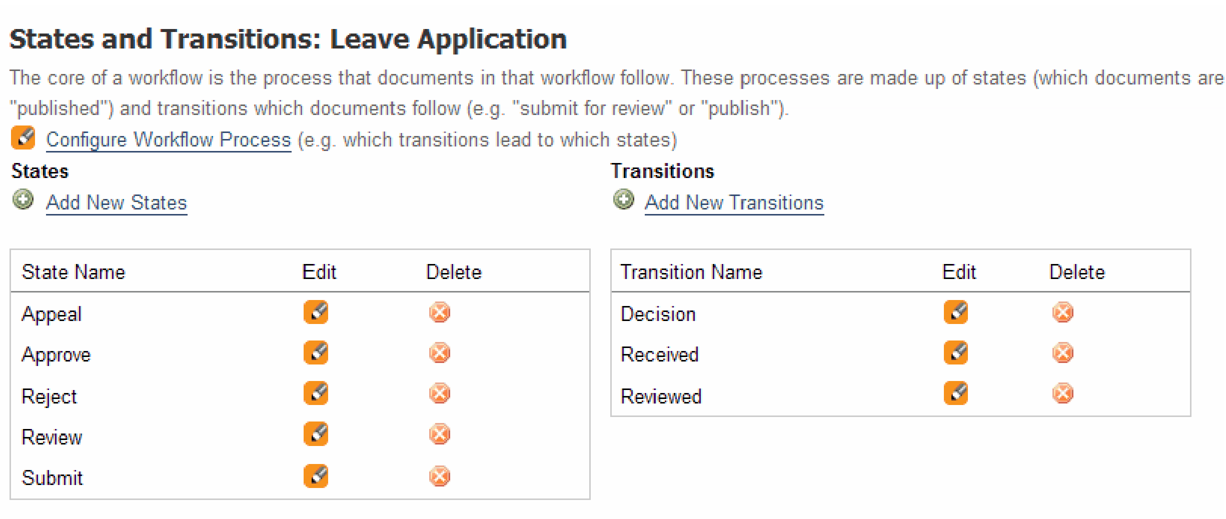


2. In the **Existing workflows** section, locate the workflow where you need to add transition restrictions; then, click the ***Edit*** icon for this workflow to open the **Workflow: [workflow name]** page.

3. In the **Workflow Administration** menu, click ***States and Transitions*** to open the **States and Transitions: [workflow name]** page.

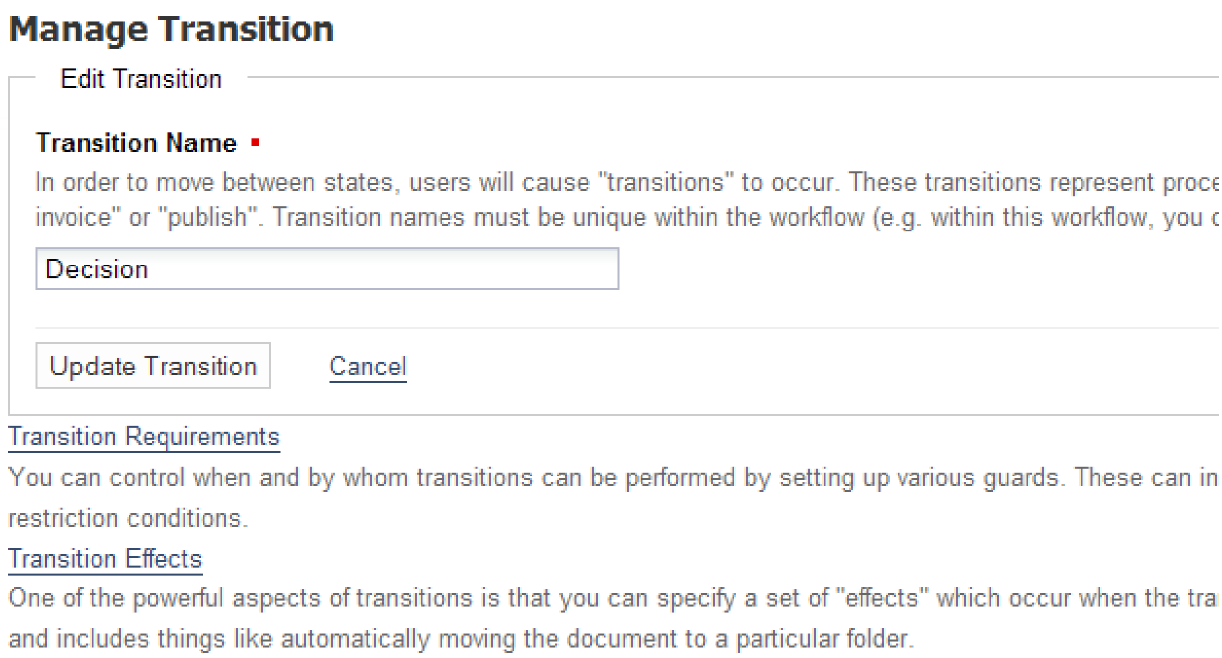


4. In the **Transitions** section, locate the transition you're configuring; then, click the ***Edit*** icon for this transition to open the **Manage Transition** page.



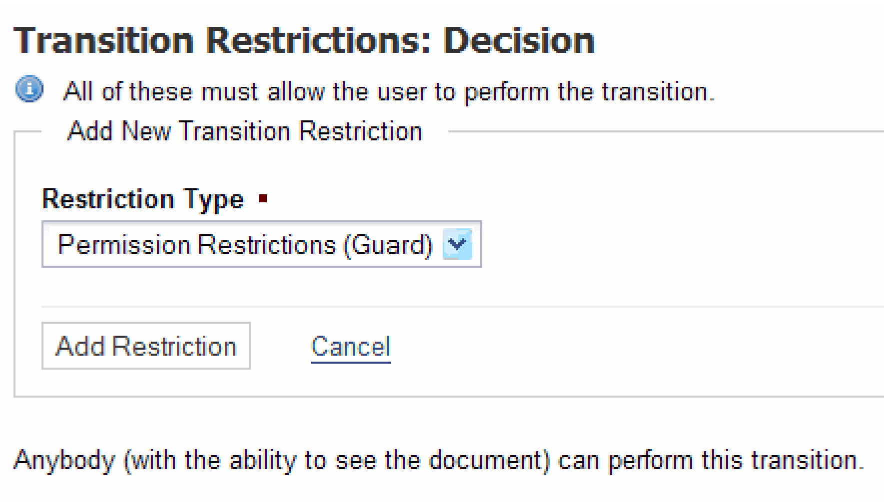
Edit Transition

5. Click ***Transition Requirements*** to open the **Transition Restrictions: [transition name]** page.

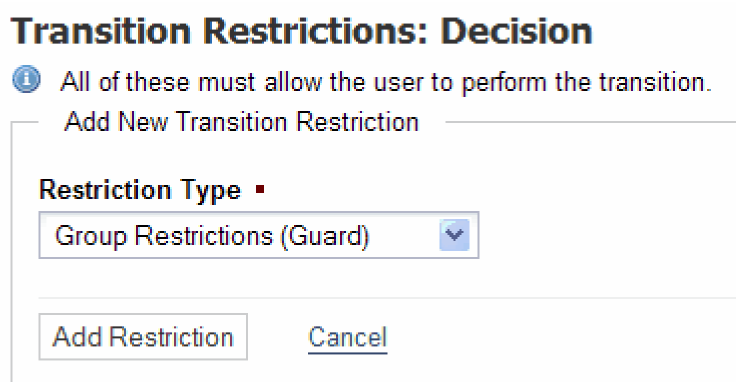


Transition Requirements

6. Click the down arrow at the **Restriction Type** drop down menu; then, select a restriction.

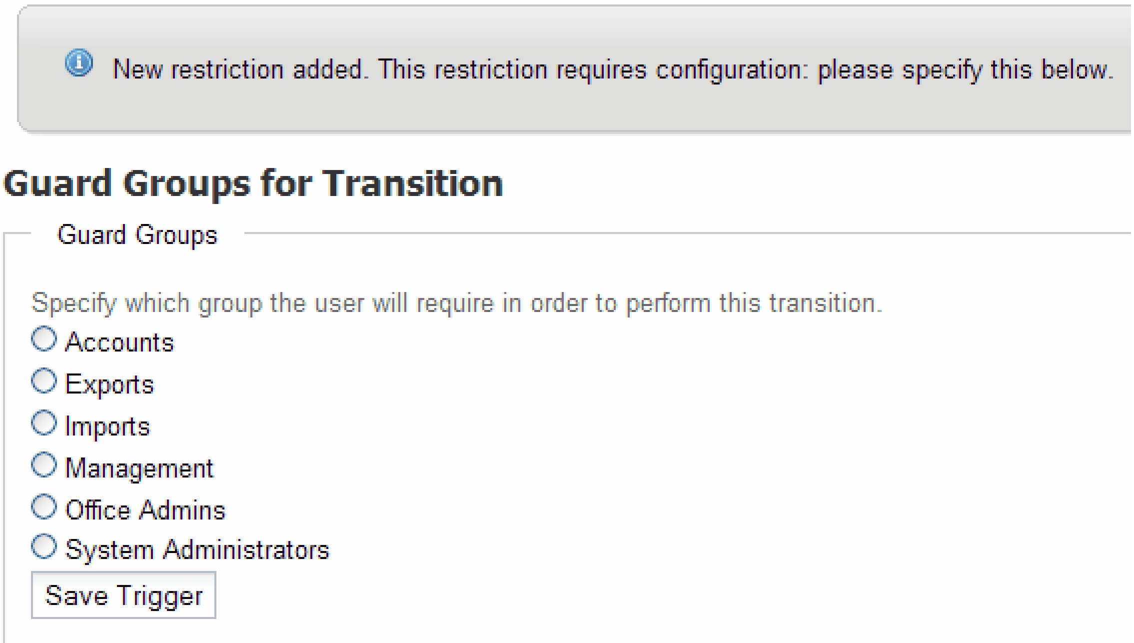


Select restriction



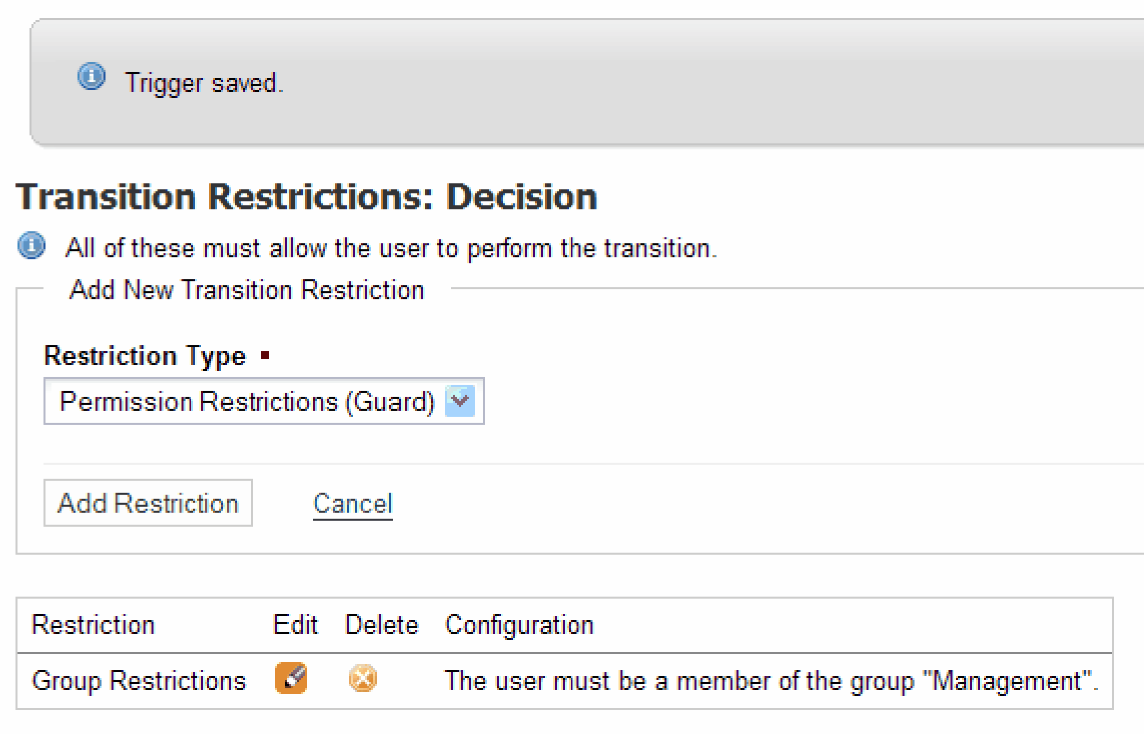
Transition restriction selected

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

3.3.5.8.6 Configuring Transition Effects

This procedure displays, edits, deletes, and adds transition effects (actions).

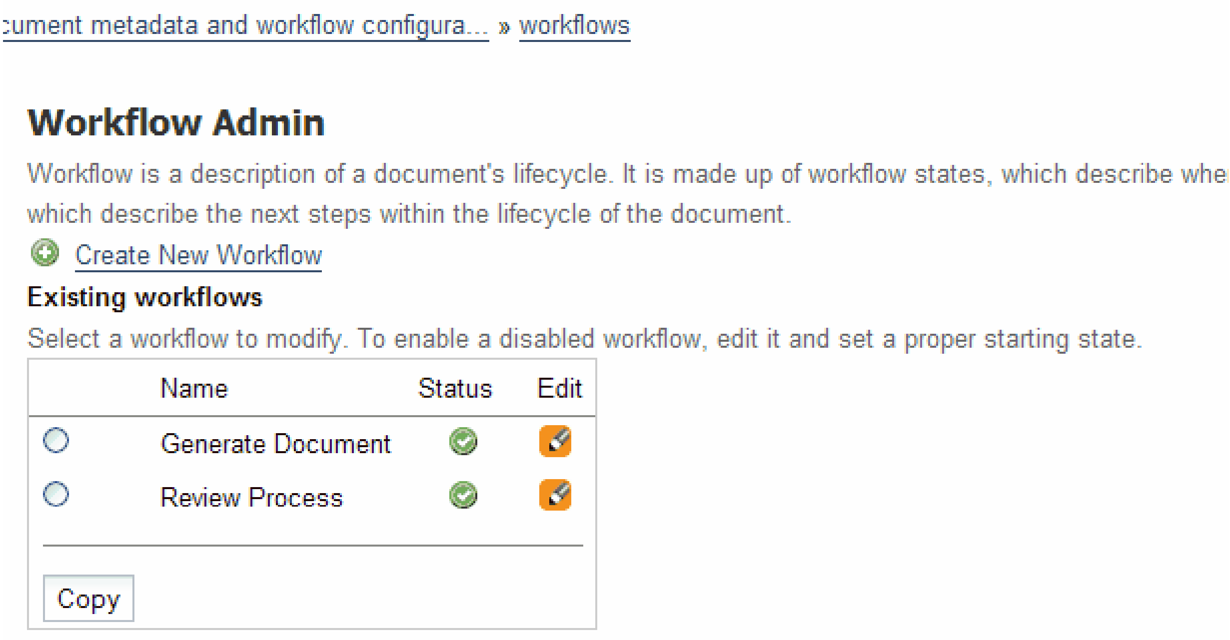
Note: *Transition effects are the actions that you want to occur on the document after it has passed through a transition in a workflow, e.g. moving the document to a specified folder.*

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 **Administration - Document Metadata and Workflow Configuration - Workflows** to open the **Workflows** main page.

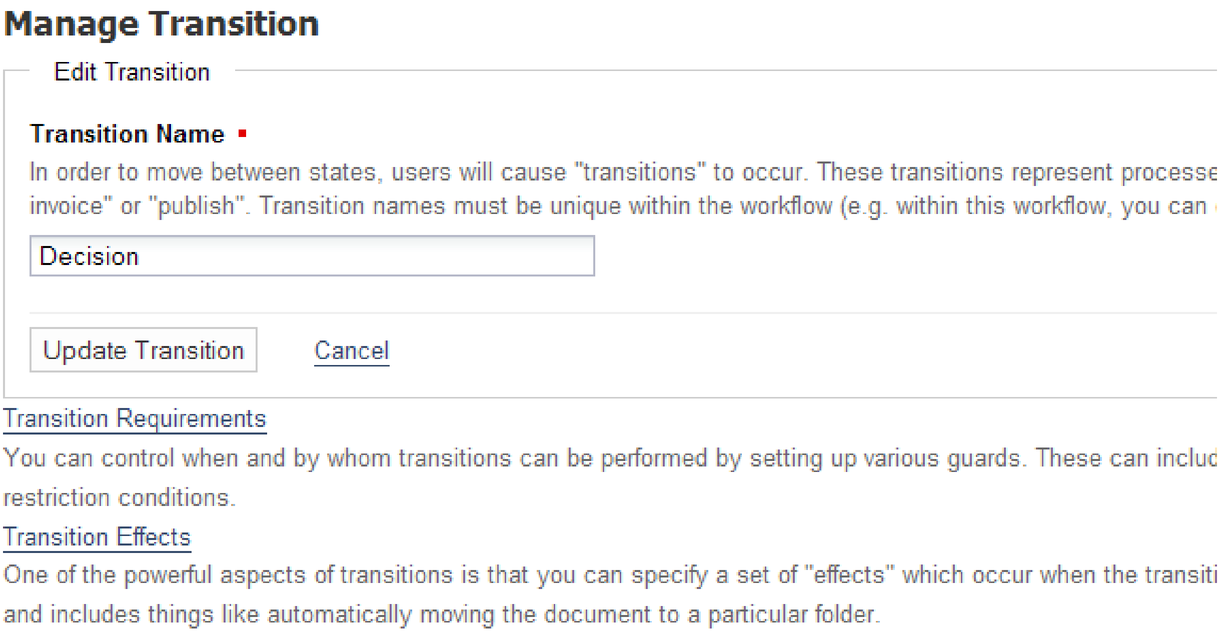


2. In the **Existing workflows** section, locate the workflow you're configuring; then, click the ***Edit*** icon for this workflow to open the **Workflow: [workflow name]** page.

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.

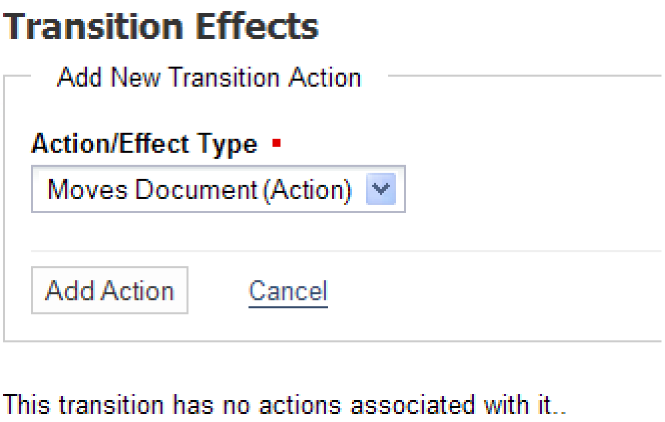


Click transition effects

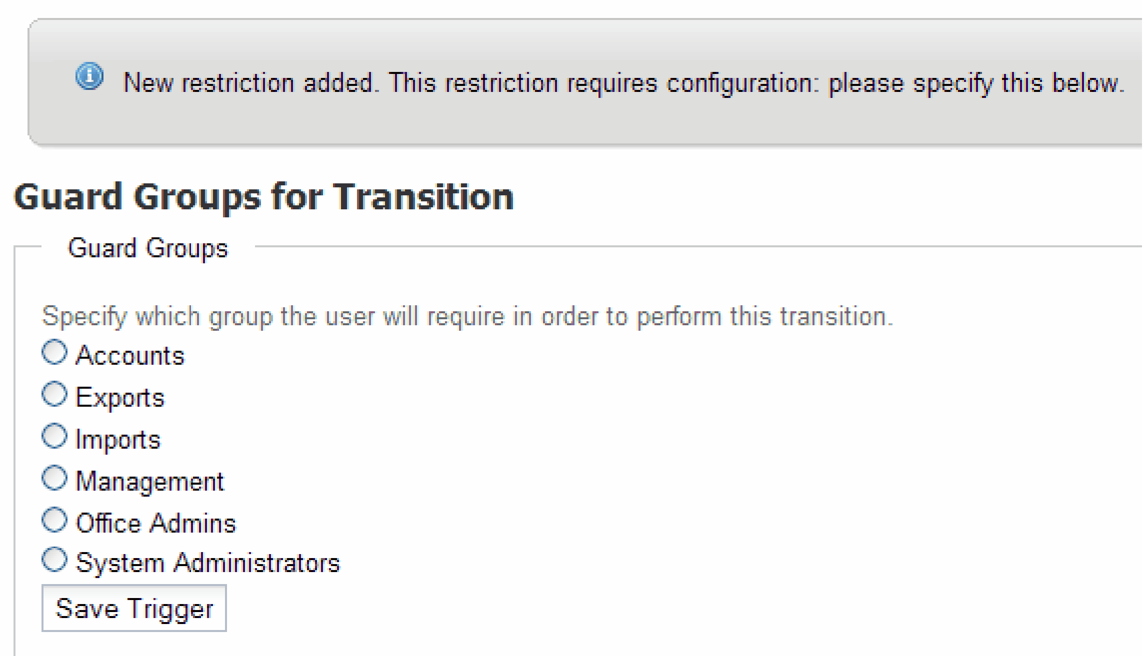
6. **Do you want to ...**
   - **view the actions/effects that exist for this transition?** A table on this page lists actions/effects that are currently set up on this transition, including configuration information for each action/effect.
   - **modify an action/effect?** View existing actions/effects 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.

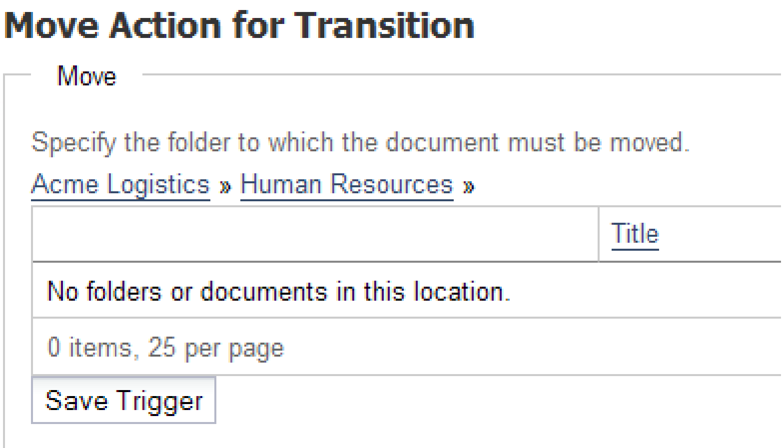


7.2. Click **Add Action** to open the **[action name] for Transition** page.



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.



3.3.5.8.7 Viewing / Editing Workflow Settings

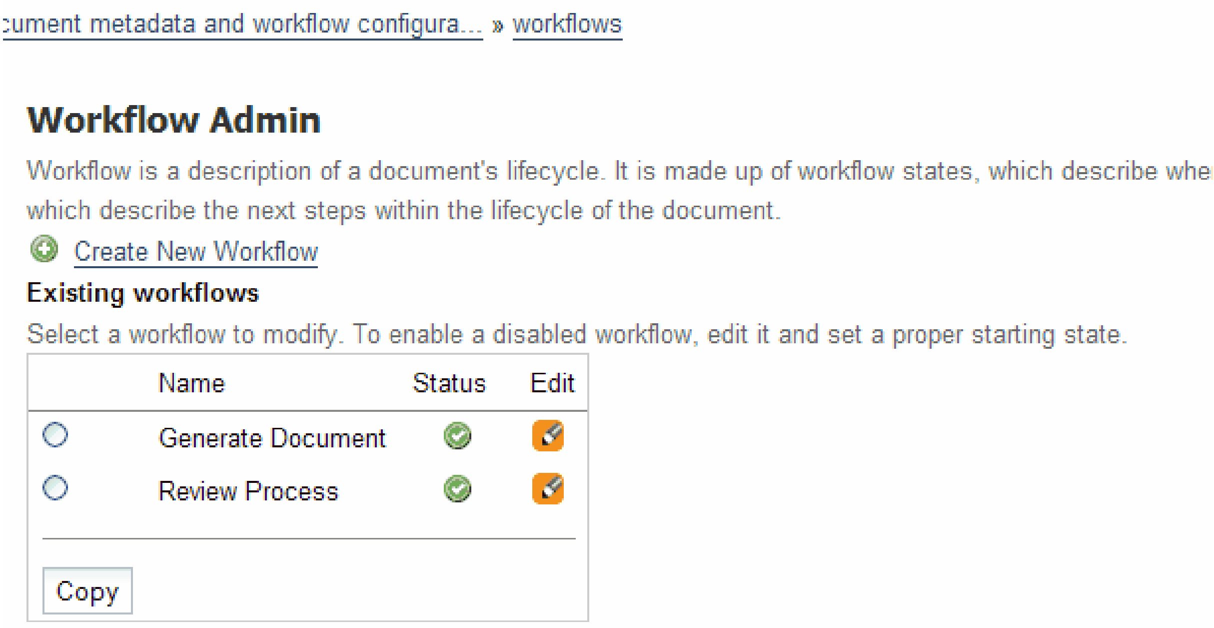
This procedure displays existing workflows and edits the following workflow settings:

- change the name of the workflow
- select a starting state
- enable or disable the workflow

Perform the following steps:

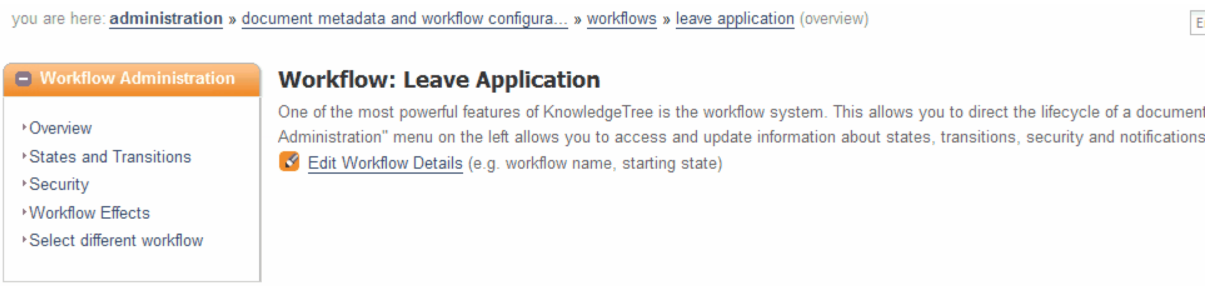
1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go

to **Administration - Document Metadata and Workflow Configuration - Workflows** to open the **Workflow Admin** page.

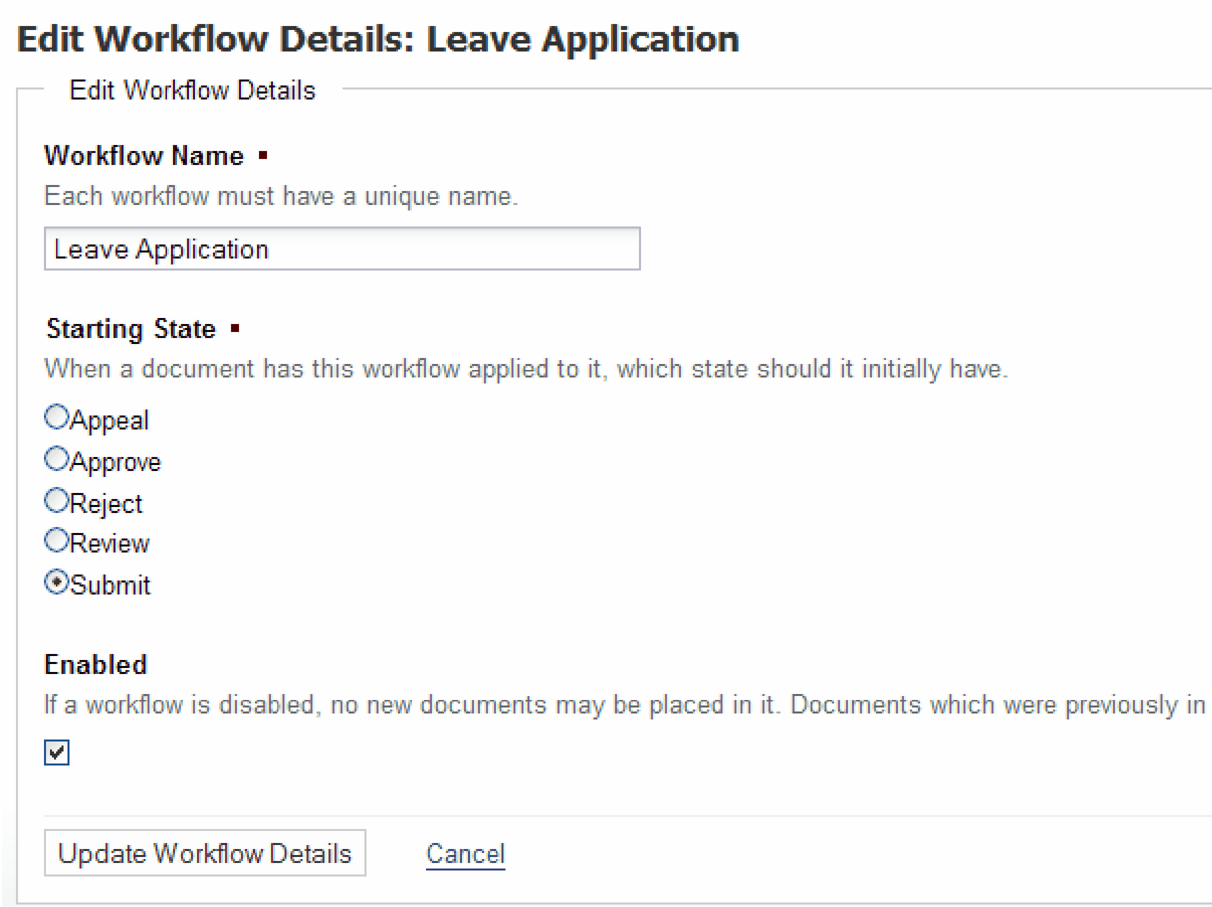


2. View existing workflows in the **Existing Workflows** section on this page.

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***.

3.3.5.8.8 Copying Workflows

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 **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.

3.3.5.8.9 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 **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.

3.3.5.8.10 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 **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.

3.3.5.8.11 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 **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.

3.3.5.8.12 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 **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.

3.3.5.8.13 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 **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.

3.3.6 Search and Indexing - Reporting

KnowledgeTree's 3.5.x (and above) search engine uses Apache Lucene full text indexing for document indexing.

Note: Some settings are not available for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.

__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)

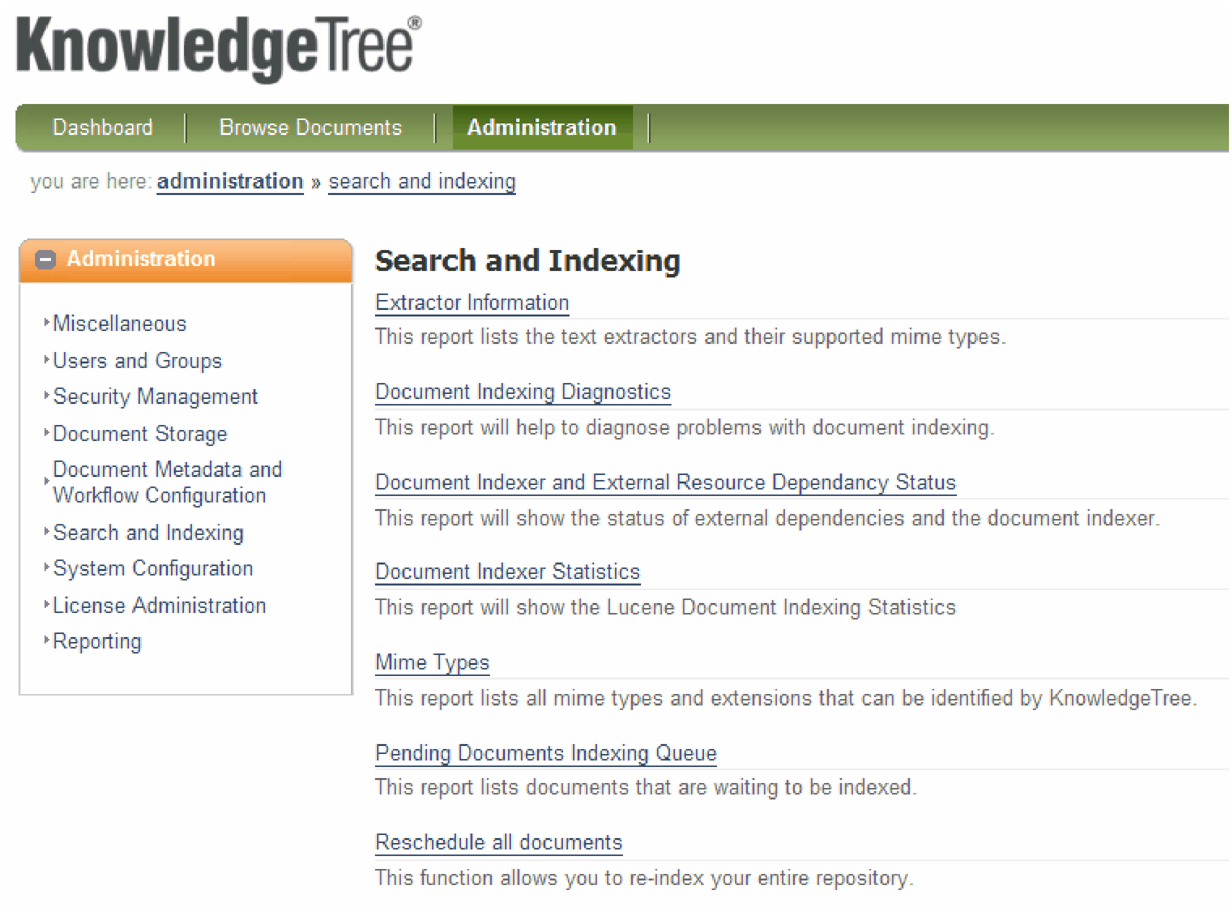


Figure: Search and Indexing - main page

3.3.6.1 Viewing Text Extractors and Supported Mime Types

This procedure displays a list of the KnowledgeTree text extractors and their supported mime types.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **Administration - Search and Indexing**.

2. Click ***Extractor Information***. View the report.
   __Note:__ This report displays the following information about each extractor: description, supported mime types, supported extensions.

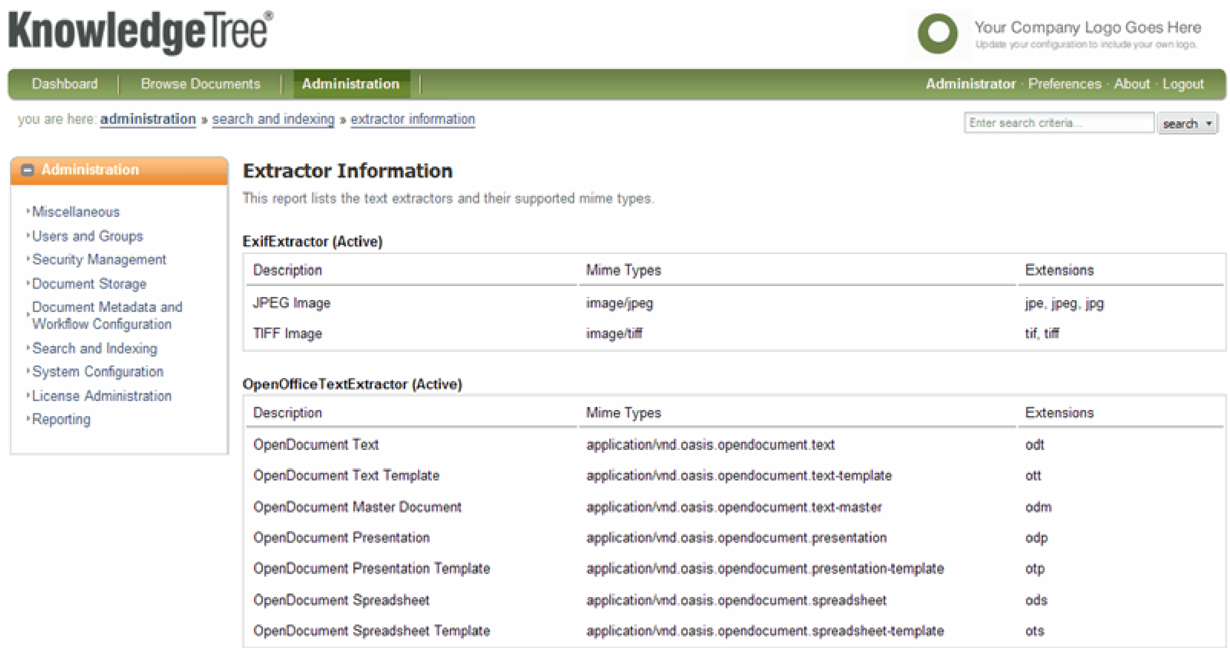


Figure: Report listing the text extractors and supported mime types

3.3.6.2 Viewing Indexing Issues and Re-scheduling Indexing

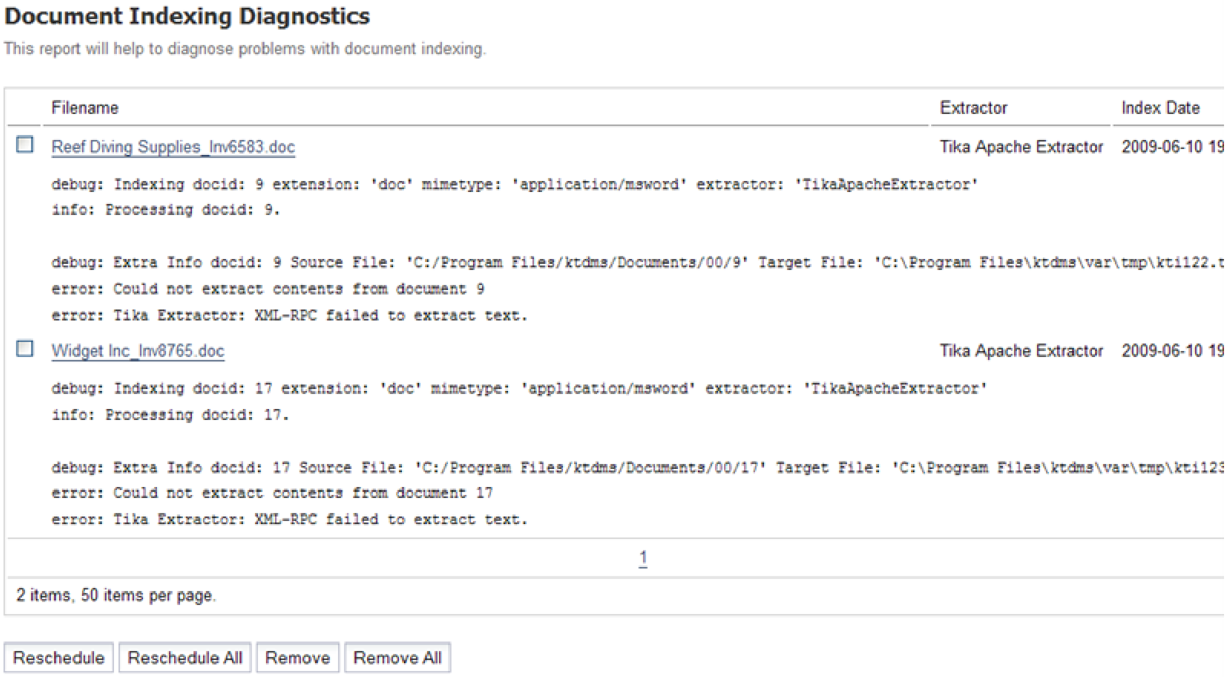
This procedure displays a diagnostic report listing documents that have caused indexing problems, deletes one or more selected problem documents, and re-schedules indexing for one or more of the documents on the report.

Note: *Some settings are not relevant for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **Administration - Search and Indexing**.
2. Click ***Document Indexing Diagnostics.***
3. View a report listing the documents that could not be indexed. The report provides the following information about each document:
   - a link to the document in the DMS
   - debug and error information
   - the mime type
   - the document ID
   - the index date
4. **Do you want to ...**
   - **delete any documents on the report?** To delete all documents, click ***Remove All***. To delete selected documents, select the check box adjacent to the problematic document - one or more; then, click ***Remove***.

- **re-schedule indexing of any documents on the report?** To re-schedule indexing on all documents, click ***Reschedule all***; or, to re-schedule indexing on selected documents, select the checkbox adjacent to the problematic document - one or more; then, click ***Reschedule***.



3.3.6.3 Viewing the Status of External Dependencies and the Document Indexer

This procedure displays a report on the status of external dependences and the document indexer, which are required components for the proper functioning of KnowledgeTree's search and indexing.

Note: *This option is not relevant for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the [KnowledgeTree Wiki](#).*

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **Administration - Search and Indexing**.

2. Click ***Document Indexer and External Resource Dependancy Status***.

3. View the report, which provides information on any problematic components, and troubleshooting information.

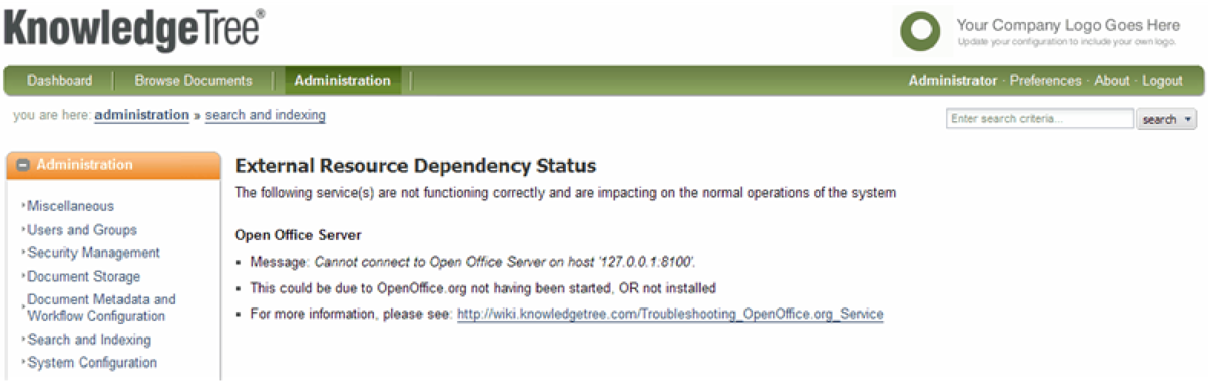


Figure: Report showing the status of external resources and the document indexer (in this case, displaying a problem with the OpenOffice Server)

3.3.6.4 Viewing Document Indexer Statistics

This procedure displays information on the status of document indexing in your KnowledgeTree installation, including:

Note: *This option is not relevant for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

- The last time the indexer was optimized - displays the date and time (hour, minute, and second)
- The period of time that has passed since the last optimization of the indexer - displays the number of days, hours, and minutes
- The date and time your system was last indexed - displays the date and time (hour, minute, and second)
- The period of time that has passed since the last indexing job
- The total number of documents in your KnowledgeTree repository
- The total number of documents that have been indexed
- The total number of documents currently in the indexing queue (documents waiting to be indexed)
- The total number of documents with indexing problems, if any
- The index coverage - displayed as a percentage, which may vary from the total as not all documents contain text.
- The queue coverage - displayed as a percentage, and indicates the percentage of documents currently queued for indexing in relation to the total size of your KnowledgeTree repository

Note: *The indexer should be periodically optimized so that you get the best performance out of the*

Document Indexer. This is managed by a background task.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **Administration - Search and Indexing**.

2. Click ***Document Indexer Statistics***.

3. View the report.

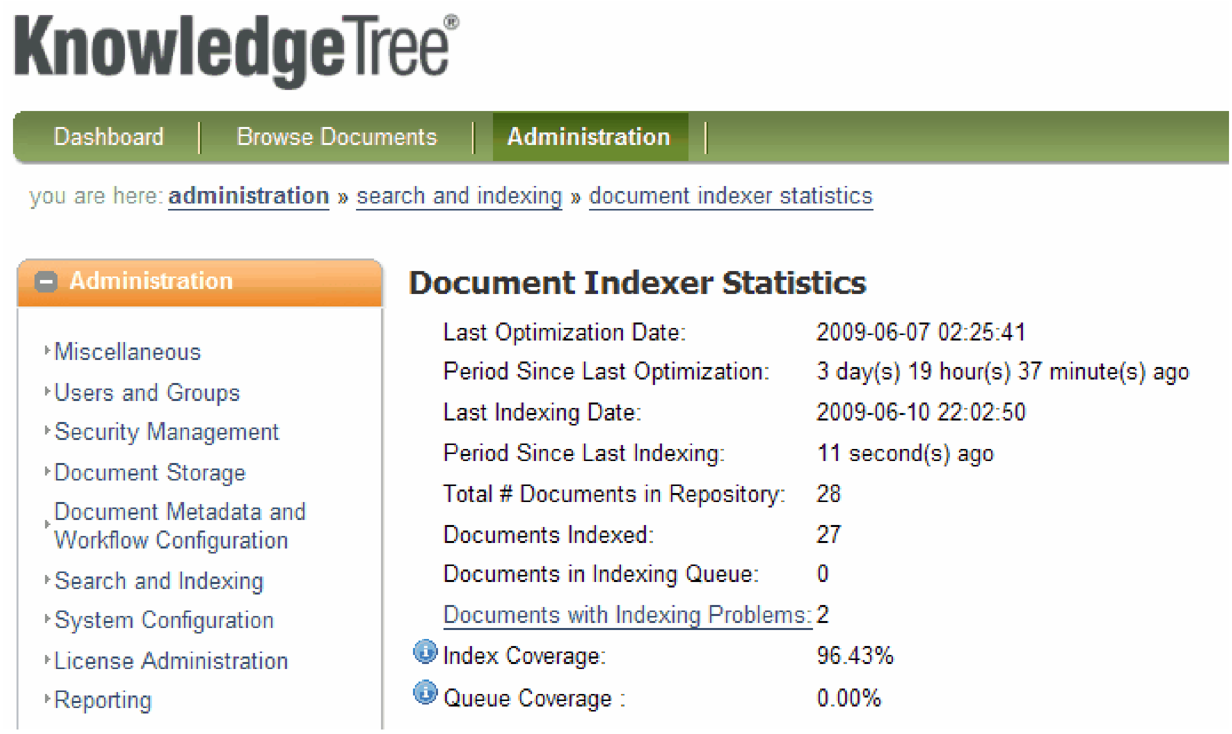


Figure: View Indexing Statistics for your system

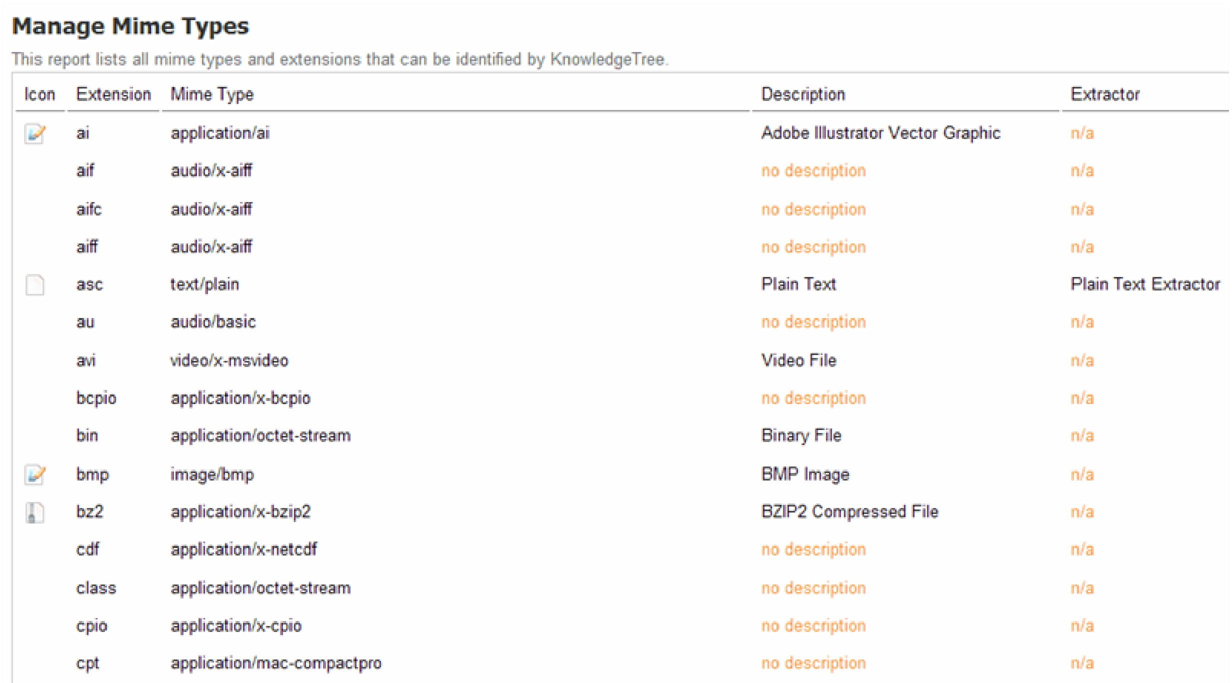
3.3.6.5 Viewing Supported Mime Types and Extensions

This procedure displays a complete report of the mime types and extensions that KnowledgeTree supports.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **Administration - Search and Indexing**.

2. Click ***Mime Types***. View the report.
   Note: *This report displays a table listing, for each mime type, the following information:*
   - *icon*
   - *extension*
   - *mime type*
   - *description*
   - *extractor*



Manage Mime Types

This report lists all mime types and extensions that can be identified by KnowledgeTree.

Icon	Extension	Mime Type	Description	Extractor
	ai	application/ai	Adobe Illustrator Vector Graphic	n/a
	aif	audio/x-aiff	no description	n/a
	aifc	audio/x-aiff	no description	n/a
	aiff	audio/x-aiff	no description	n/a
	asc	text/plain	Plain Text	Plain Text Extractor
	au	audio/basic	no description	n/a
	avi	video/x-msvideo	Video File	n/a
	bcpio	application/x-bcpio	no description	n/a
	bin	application/octet-stream	Binary File	n/a
	bmp	image/bmp	BMP Image	n/a
	bz2	application/x-bzip2	BZIP2 Compressed File	n/a
	cdf	application/x-netcdf	no description	n/a
	class	application/octet-stream	no description	n/a
	cpio	application/x-cpio	no description	n/a
	cpt	application/mac-compactpro	no description	n/a

Figure: Report displaying supported mime types and related information

3.3.6.6 Viewing Documents in the Indexing Queue

This procedure displays documents waiting in the document indexing queue.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **Administration - Search and Indexing**.

2. Click ***Pending Documents Indexing Queue***.

3. View the report, which lists document in the indexing queue.
   Note: *Only documents that are associated with an extractor can be indexed. These documents may be recognized in the list as the value in the Extractor Column reads n/a (not applicable).*

3.3.6.7 Reschedule all documents

This procedure allows you to re-index your entire document repository.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **Administration - Search and Indexing - Reschedule all documents.**

2. Click ***Reschedule all documents***.

3. On the **Reschedule all documents** page, click ***Reschedule all***.

3.3.7 System Configuration

Most of KnowledgeTree's configuration tasks may be viewed and edited through the web interface, in **Administration - System Configuration**.

Note: *Some settings are configurable in KnowledgeTree's **config.ini** file.*

Client Tools
- the KnowledgeTree Tools server
- Client Tools policies
- WebDAV
- the OpenOffice.org service

Email
View, add, and edit:
- the sending email server address
- email password
- email port
- user name
- policies for emailing documents and attachments from KnowledgeTree

General Settings
View, add, and edit 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
- whether to always display the 'Your Checked-out Documents' dashlet

Internationalization
- Define the default language for the KnowledgeTree user interface
- enable and disable 'search ideographic language'

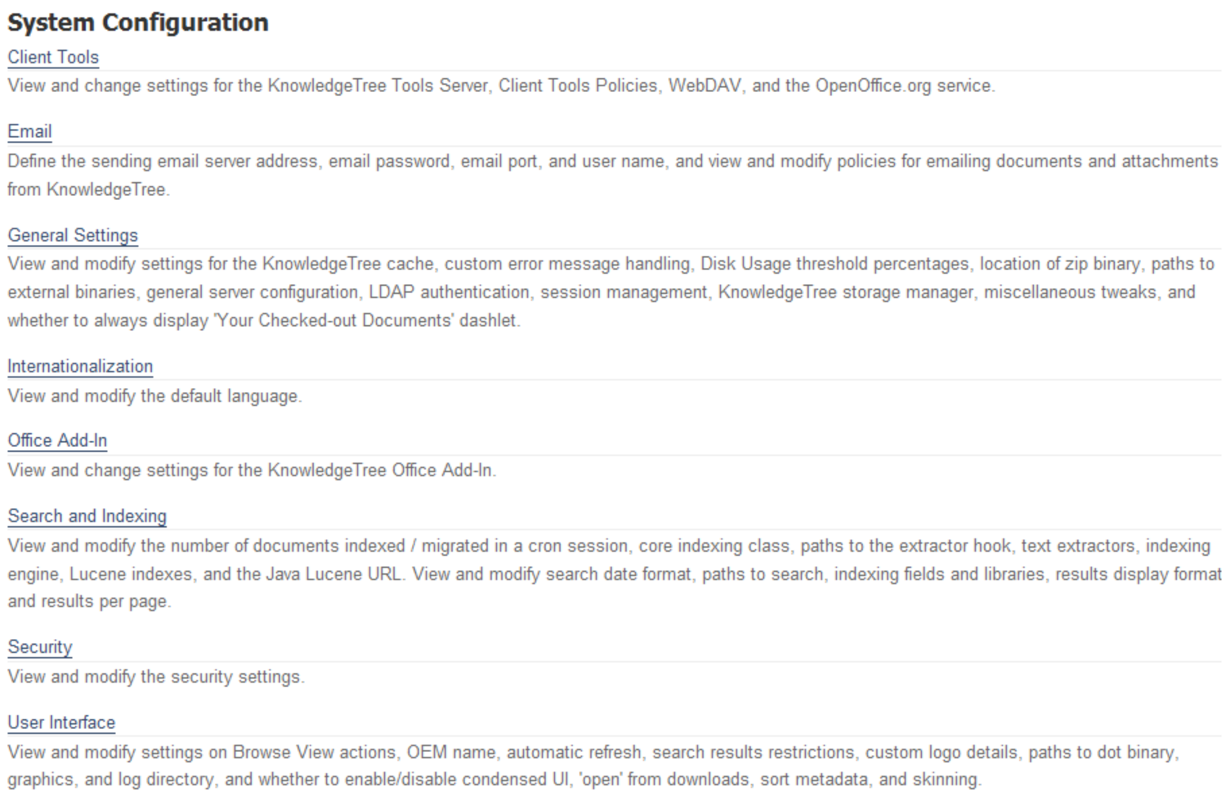
Office Add-in
Configure central policies for the KnowledgeTree Office Add-in:
- password storage
- whether to capture reasons on check-in and check-out

Search and Indexing - Settings
Configure settings for:
- the Document Indexer
- the OpenOffice.org service

- Search

⊟ Security
Configure security features:
- Electronic Sign

⊟ User Interface
Configure settings for:
- the Browse View
- Custom error messages
- the User Interface



System Configuration Interface

3.3.7.1 KnowledgeTree config.ini

This topic describes settings that are changed in KnowledgeTree's **config.ini** file.

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 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 (May 2009), 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 = password
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 = default
```

- **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
```

- **Main logo URL**

```
mainLogoURL = ${rootUrl}
```

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

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

- **'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 F

logDirectory = ${varDirecto

documentRoot = C:/Program F

uiDirectory = ${fileSystemR
knowledgeTree

tmpDirectory = ${varDirecto
```

- **The dedicated feed URL**

```
dedicatedrsstitle = RSS Fee
dedicatedrssurl =
```

- **Files**

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

`[session]`

- **IP address for sessions**
  Change this setting to `true` 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 = cp1252
```

`[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 = ${varDirec
```

- **Files**

```
cachePlugins = true
```

Note: *This setting is no longer used and will be removed from the config.ini file in a future release.*

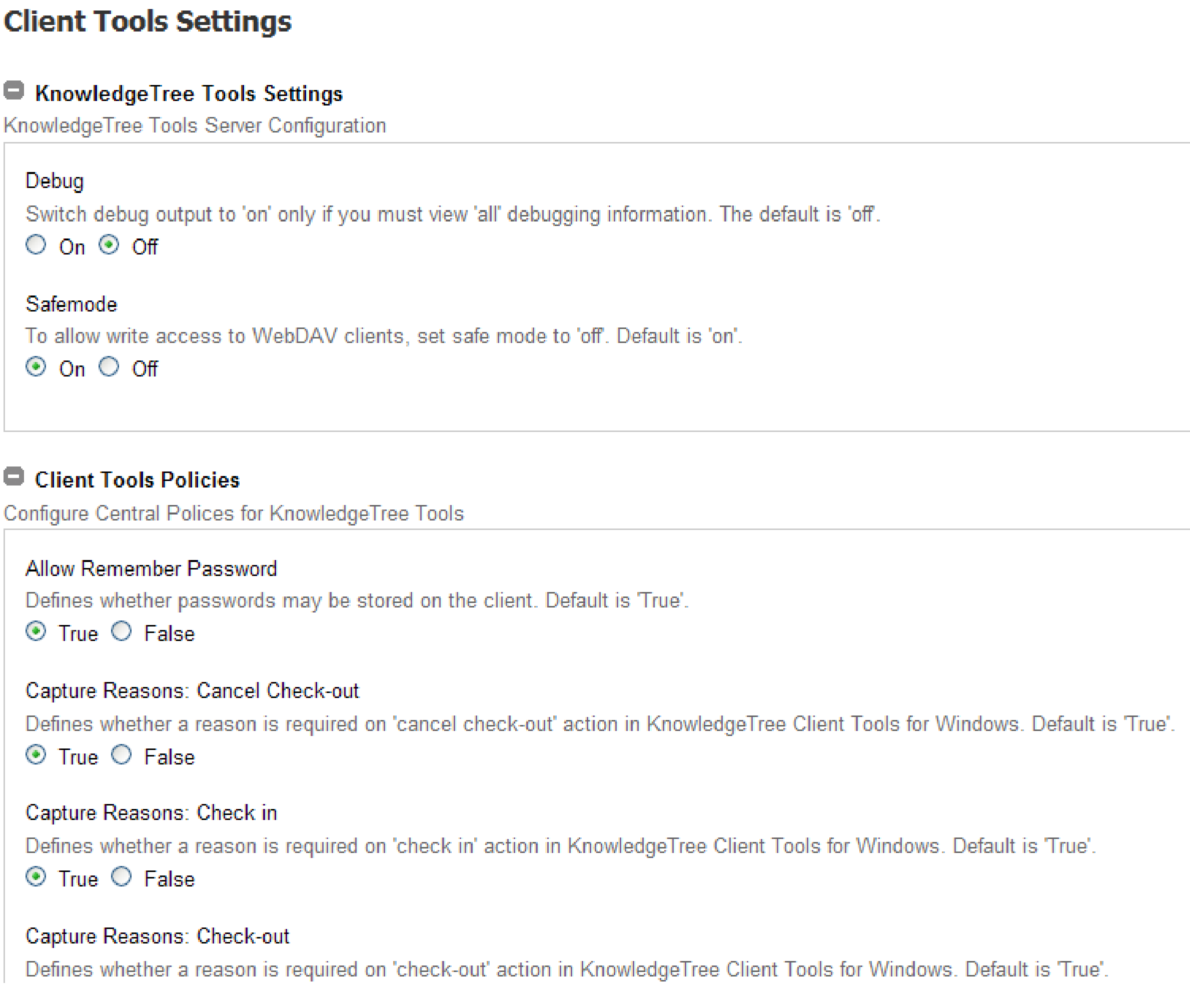
3.3.7.2 Client Tools

In **Administration - System Configuration - Client Tools**, you can view and edit settings for:

- the KnowledgeTree Tools server
- Client Tools policies
- WebDAV
- the OpenOffice.org service

Note: *There are two settings for WebDAV on this page:*

- ***WebDAV*** *- Debug, Safemode: configures the normal WebDAV interface*
- ***KnowledgeTree Tools Settings*** *- Debug, Safemode: configures the extended interface used by KnowledgeTree Tools*



System Configuration - Client Tools Settings

3.3.7.3 Email

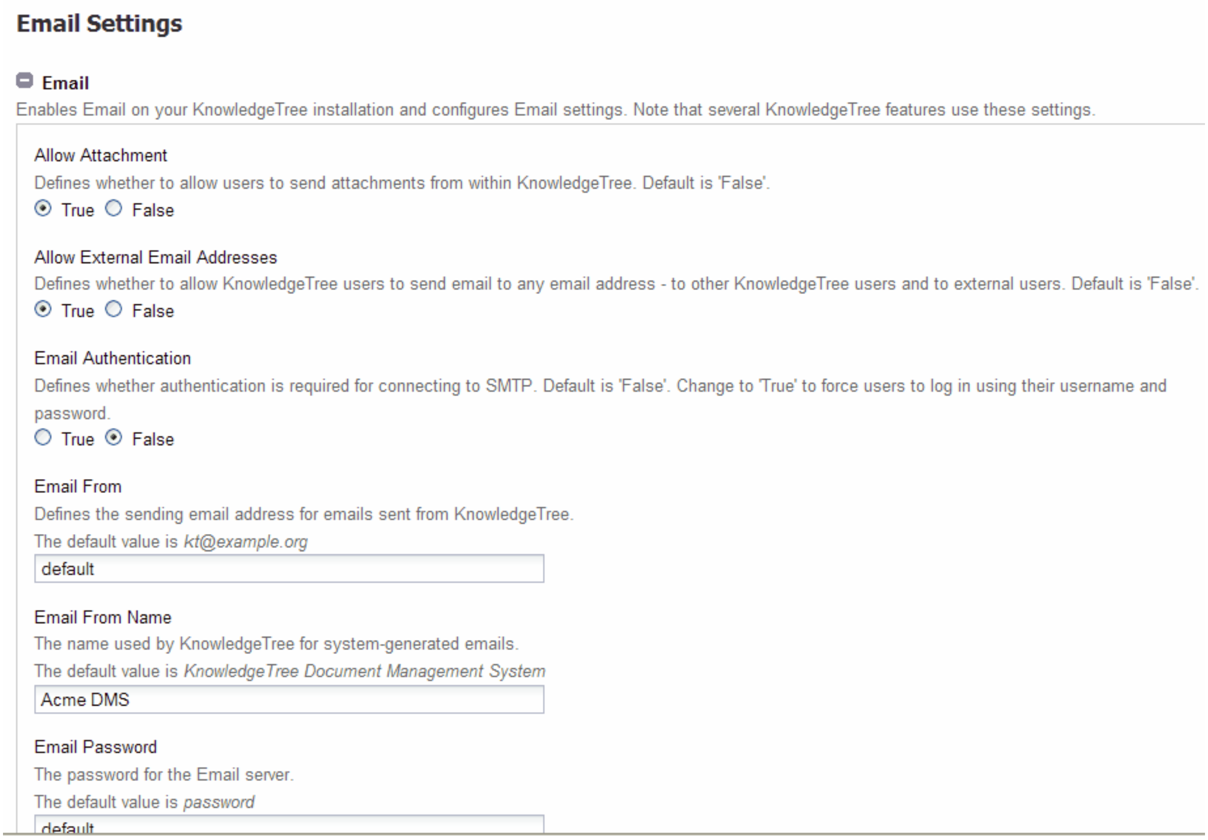
Configure emailing on the KnowledgeTree server in **Administration - System Configuration - Email.**

Note: *The* ***Mail Server Status*** *dashlet displays on the dashboard until you enable emailing.*

Note: *Some settings are not relevant for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

On this page you can view, add, and edit:
- the sending email server address
- email password
- email port
- user name

- policies for emailing documents and attachments from KnowledgeTree



3.3.7.3.1 Configuring Email Settings for 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.*

Note: *Some settings are not relevant for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **Administration - System Configuration - Email** to open the **Email Settings** configuration page.

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*

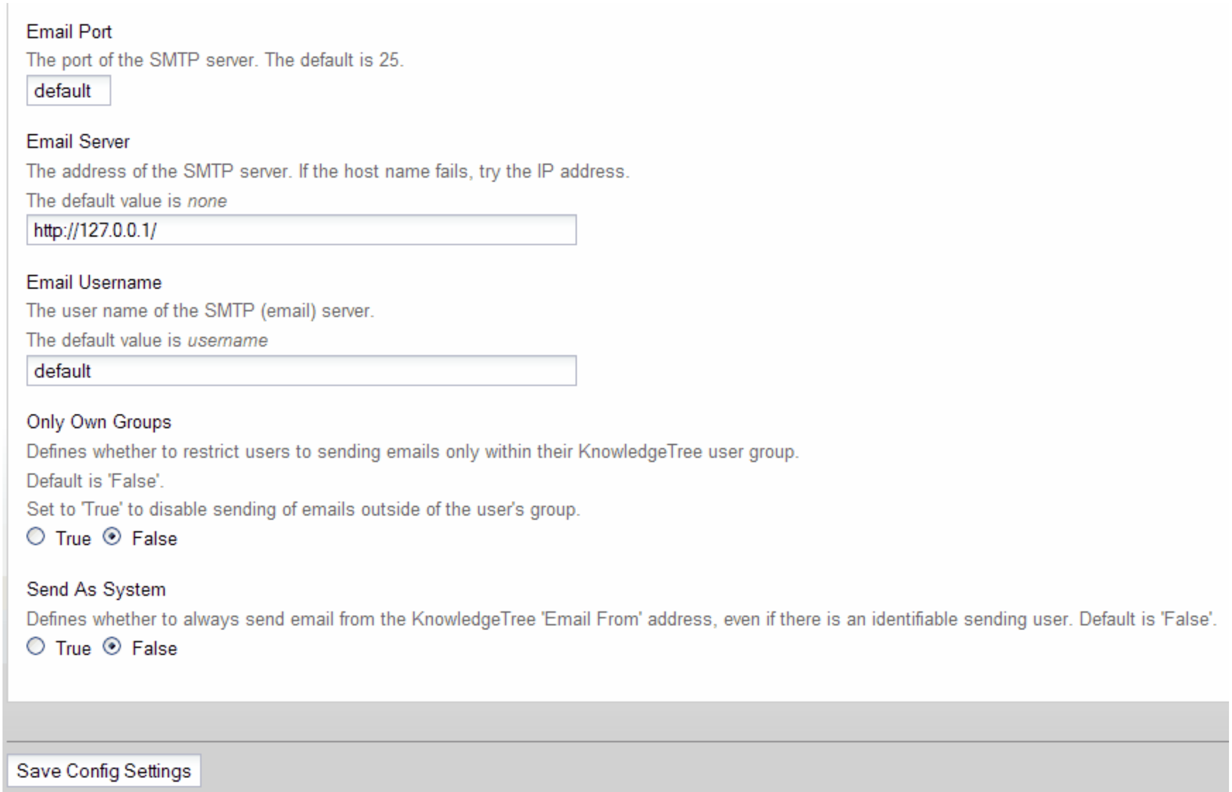
kt@acme.com

Email From Name

The name used by KnowledgeTree for system-generated emails.

The default value is *KnowledgeTree Document Management System*

Acme DMS



3.3.7.4 General Settings

Configure the following settings in **Administration - System Configuration - General settings**:

- KnowledgeTree Cache
  View and edit the following settings:
  - the location of the KnowledgeTree cache (the default is C:/Program Files/ktdms/var/cache);
  - whether the cache is enabled (the default is 'False');
  - the path to the proxy cache (the default is /cache; the default value is C:/Program Files/ktdms/var/proxies);
  - whether the proxy cache is enabled (default is 'True');

- Dashboard
  View and edit the following settings:
  - whether to always display the 'Your Checked-out Documents' dashlet, even when there is no data to display. Default is 'False'

- Disk Usage Dashlet
  View and edit the following settings:
  - the 'Urgent Threshold' - the percentage below which the mount in the Disk Usage dashlet changes to Red, indicating that the lack of free space in the mount is critically low (the default value is 5%);

  - the 'Warning Threshold - the percentage below which the mount in the Disk Usage dashlet changes to Orange, indicating that the mount point is running out of free space (the default value is 10%)

- Export
  Configures the following settings for KnowledgeTree's 'Bulk Export' feature:
  - whether to use the external zip binary for compressing archives (default is to use the PEAR archive class);
  - whether to use the Bulk Download Queue, which performs bulk downloads in the background to prevent issues with normal browsing while the download is in progress
  - the location of the zip binary - the zip command uses 'execSearchPath' to find the zip binary if the path is not provided. Values are auto-populated, specific to your installation, either Windows or Linux (the default value is 'zip', e.g. on Windows, C:/ Program Files/ktdms/bin/zip/zip.exe

- External binaries
  Configures the paths to the various external binaries that KnowledgeTree uses:
  - antiword
  - catdoc
  - catppt
  - df
  - java
  - pdftotext
  - php
  - pstotext
  - python
  - xls2csv

- GUID Inserter
  Defines whether to backup the latest content version of documents before inserting the GUID

- Import
  Configures Bulk Import settings:
  - enable and disable the Bulk Import plugin (default is 'False');
  - the location of the unzip binary - the unzip command uses 'execSearchPath' to find the unzip binary if the path is not provided. Values are auto-populated, specific to your installation, either Windows or Linux (default value is 'unzip', e.g. on Windows, this may be C:/Program Files/ktdms/bin/unzip/unzip.exe

- **KnowledgeTree**
  Configures the following general settings for your KnowledgeTree installation:
  - the level of logging to use (DEBUG, INFO, WARN, ERROR). The default is INFO;
  - the location of the mime magic database file. The default value is C:/Program Files/ ktdms/knowledgeTree/../common/share/file/magic
  - whether to redirect to the Browse View (Browse Documemts) on login, instead of the Dashboard. The default is 'False';

- defines one or more users who must be directed to the Dashboard on Login, when 'Redirect to Browse' is set to 'True in the previous setting

- the path to the web application from the root of the web server (root URL). For example, if KT is at http://example.org/foo/, then the root directory should be '/foo';

- Scheduler Interval - defines the frequency, in seconds, at which the Scheduler is set to run. The default value is 30;

- whether to use the AJAX dashboard, which allows users to drag the dashlets to change the Dashboard display. The default is 'True';

LDAP authentication
Configures the following settings:
- whether to allow LDAP groups to be created automatically. Default is 'False';

- whether to allow for users moving around within the LDAP or Active Directory structure, which typically causes failed login for these users. Enabling this setting triggers a search for these users (using their sAMAccountName setting) when their login attempts fail, and allows updating of their authentication details;

Server settings
Configures the following settings for the server:
- the Internal Server IP - typically, this is set to 127.0.0.1.
- the Internal Server port - the default value is 80;
- the External Server IP
- the External Server port

Session management
Configures the following settings:
- whether to allow anonymous users to log in automatically. Default is 'False'.
  Note: *Best practice is not to allow automatic login of anonymous users unless you understand KnowledgeTree's security mechanisms, and have sensibly applied the roles 'Everyone' and 'Authenticated Users'.*

- whether to automatically create a user account on first login for any user who does not yet exist in the system. Default is 'False'.

- session timeout - defines the period, in seconds, after which the system times out following a period of inactivity.

Storage
Defines the storage manager to use for storing documents on the file system. The default value is KTOnDiskHashedStorageManager

Tweaks
Configures the following miscellaneous tweaks for your KnowledgeTree installation:
- Browse to Unit Folder - specifies a logged in user's 'Unit' folder as their default folder view in Browse Documents. The default, 'False', displays the root folder;

- Always Force Original Filename on Check-in - setting this to 'True' hides the option to force the original filename of a document on check-in, and ensures that the filename will always stay the same;

- Generic Metadata Required - defines whether to present KnowledgeTree's generic metadata fields for users to fill out on document upload. Default is 'True';

- Increment version on rename - defines whether to update the version number if a document filename is changed/renamed;

- Noisy Bulk Operations - defines whether bulk operations generate a transaction notice on each item, or only on the folder. The default, 'False' indicates that only folder transactions occur.

- Php Error Log File - enables PHP error logging to the log/php_error_log file. Default is 'False';

- Update Document Version (Content) on Editing Metadata - setting this to 'True' allows the document version to increase when the document metadata is updated. The document version is equivalent to the document content version.

URLs
Defines the paths to the KnowledgeTree server and file system for the following components: Note that full values are specific to your installation, i.e. either Windows or Linux:

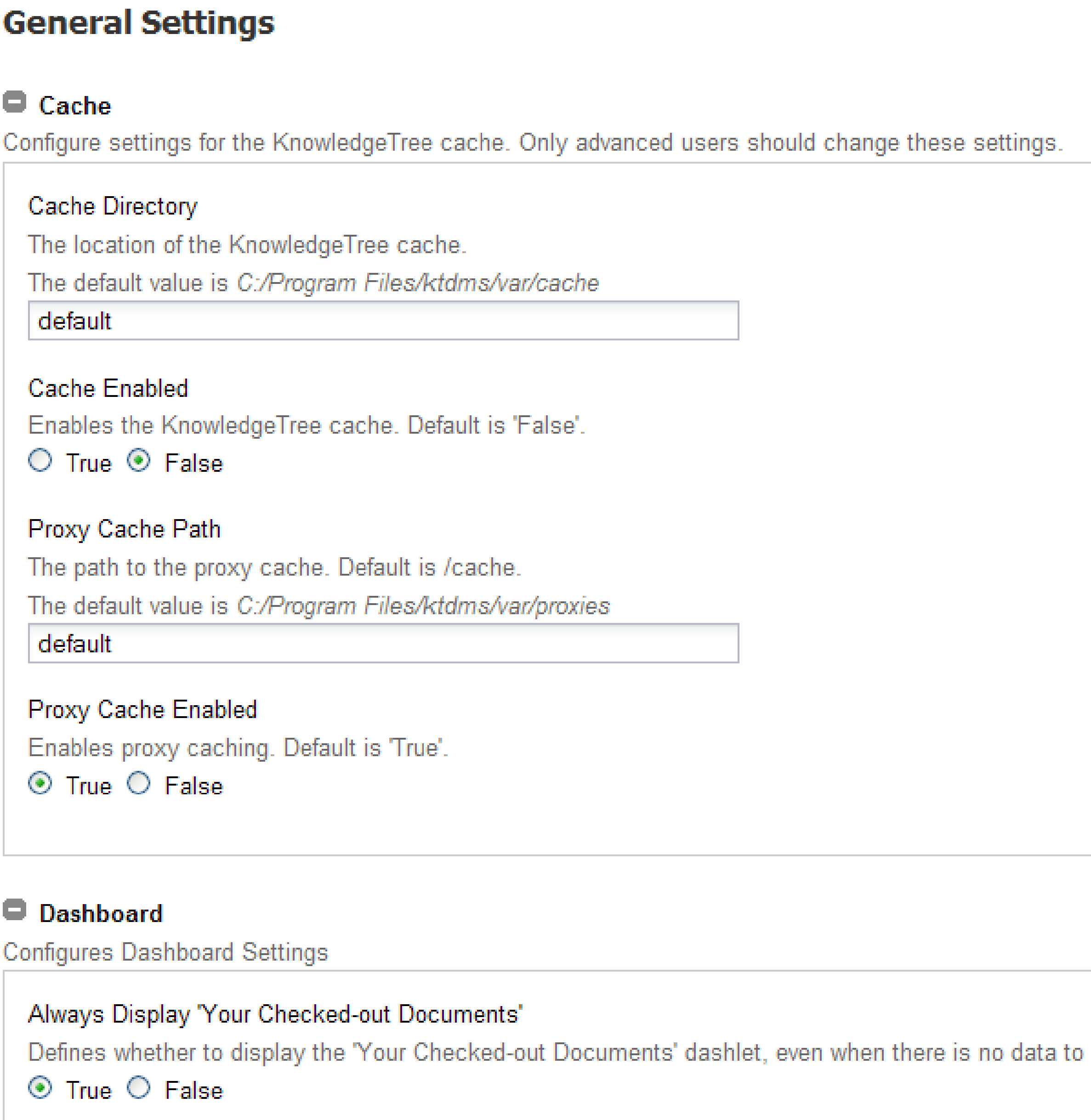
- Document Directory
- Graphics Url - the path to the user interface graphics
- Log Directory
- PDF Directory - the path for storing the generated PDF Documents
- Stopwords File
- Temp Directory
- UI Directory
- User Interface Url - the path to the core user interface libraries
- Var Directory

User Preferences
Configures the following settings:

- defines the minimum password length on password-setting (the default value is 6);

- Restrict Admin Passwords - defines whether to require the admin user to apply minimum password length when creating and editing accounts. The default, 'False', allows the admin user to create accounts with shorter passwords than the specified minimum;

- Restrict Preferences - defines whether to restrict users from accessing the 'Preferences' menu. Default is 'False';



System Configuration - General Settings

3.3.7.4.1 Allowing Anonymous Login

This procedure allows anonymous users to log in to the system.

Note: *This option is not relevant for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

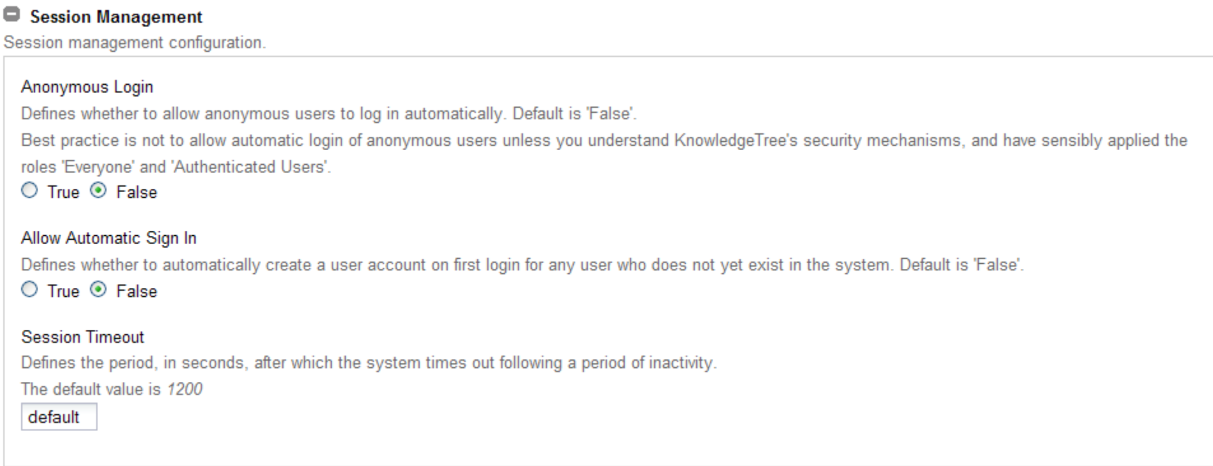
Note: *The default is* False*, which disallows anonymous login; changing this setting is not recommended unless KnowledgeTree's security features are well understood, and the roles 'Everyone' and 'Authenticated Users' are sensibly applied.*

Perform the following steps:

1. Use your administrator username and password to log in to KnowledgeTree's web interface; then, go to **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

3.3.7.4.2 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 **Administration - System Configuration - General Settings**.

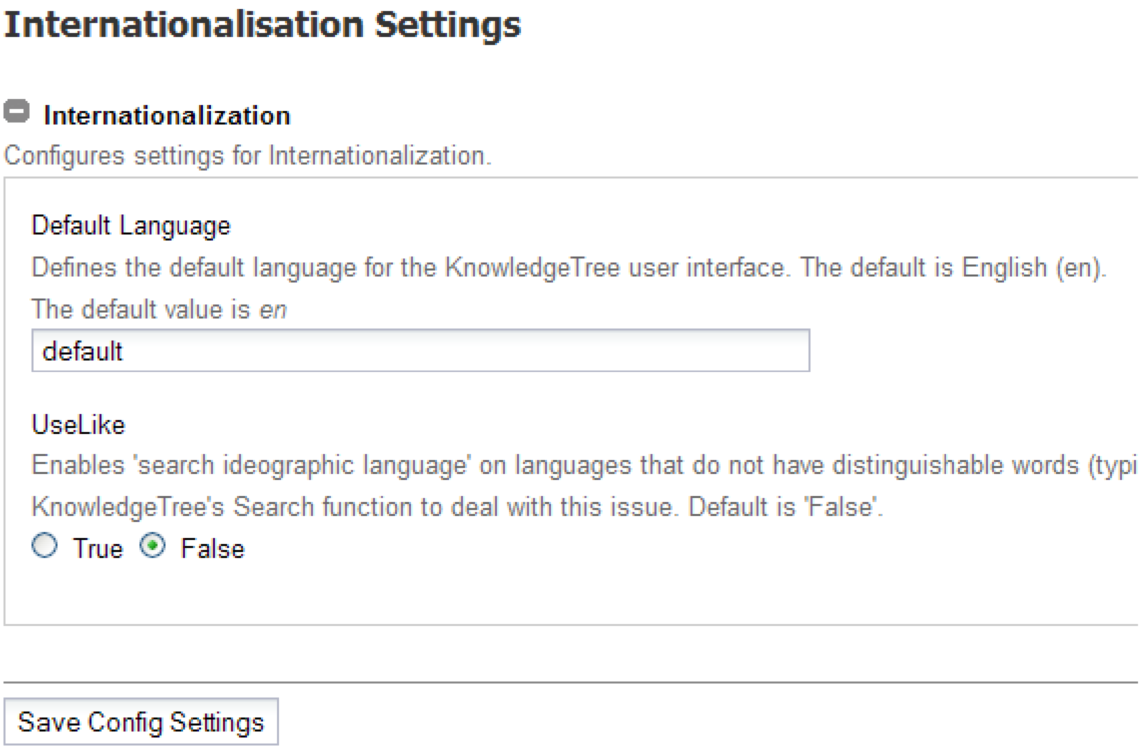
2. In **General Settings**, locate the **KnowledgeTree** section; then, change the value in the **Use AJAX dashboard** setting to *False*.

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

3.3.7.5 Internationalization

In **Administration - System Administration - Internationalization**, you can:

- view and modify the default language for KnowledgeTree's web interface - the default is English.
- enable and disable 'search ideographic language' on languages that do not have distinguishable words (typically, where there is no space character), and allows KnowledgeTree's Search function to deal with this issue. The default is 'False'.



System Configuration - Internationalization Settings

3.3.7.6 Search and Indexing - Settings

Configure settings for the following components in **Administration - System Configuration - Search and Indexing**:

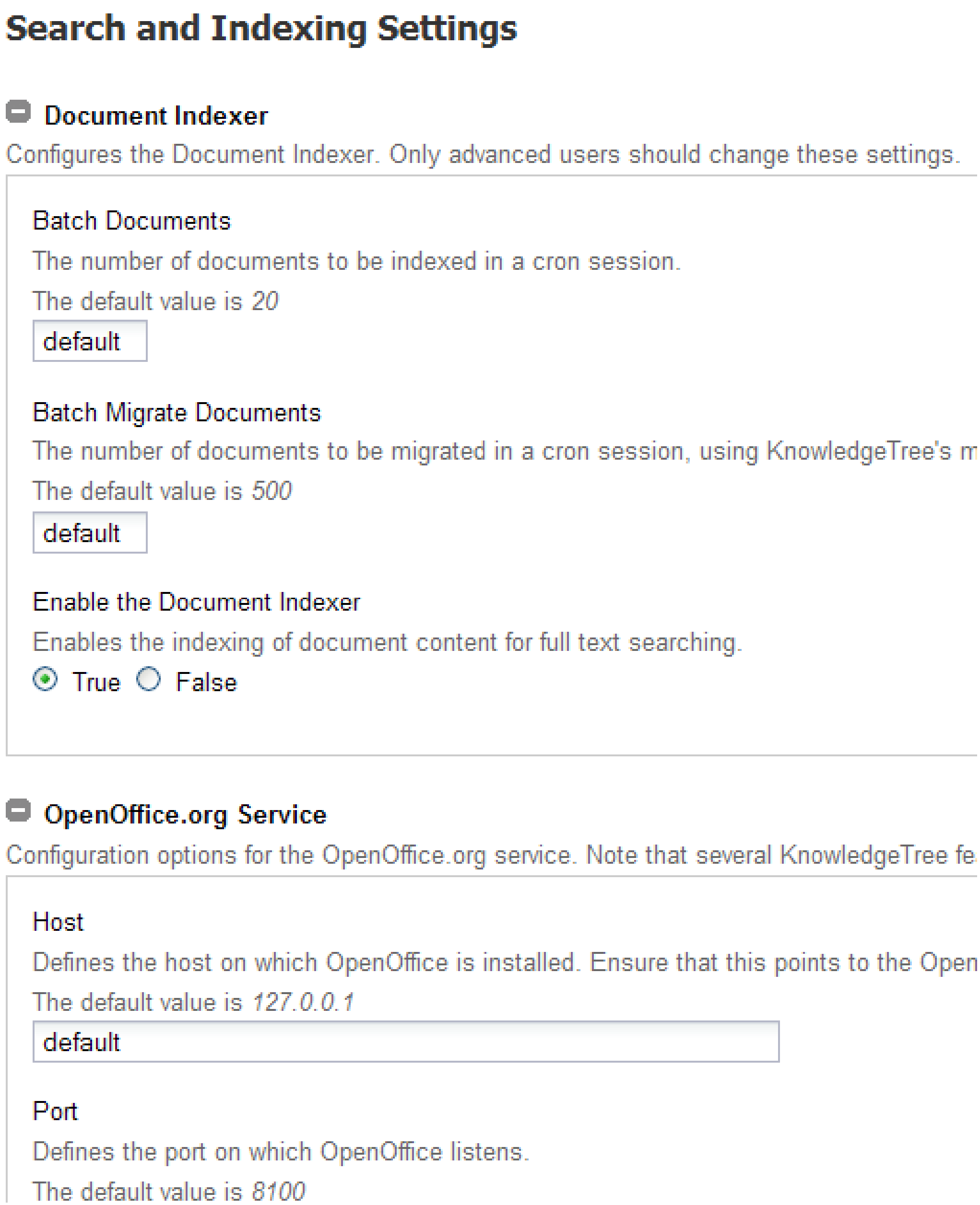
Note: *Some settings are not relevant for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

- **Document Indexer** - configure the number of documents to be indexed in a cron session (the default value for batch documents is 20), the number of documents to be migrated in a cron session (the default value for batch migration documents using KnowledgeTree's migration script is 500); and enable or disable the Document Indexer.
- **OpenOffice.org Service** - configuration options for the OpenOffice.org service,

including: the host on which OpenOffice is installed (the OpenOffice server); the port on which OpenOffice listens (default value is 8100); the path to the OpenOffice program directory (default value is ../openoffice/program)
Note: *Several KnowledgeTree features use this service.*

- **Search** - configure maximum results from SQL query (default is 10000); define how search results display format (options are: search engine style, or browse view style. The default is 'Search Engine Style'); define the number of search results to display per page (default value is 25).

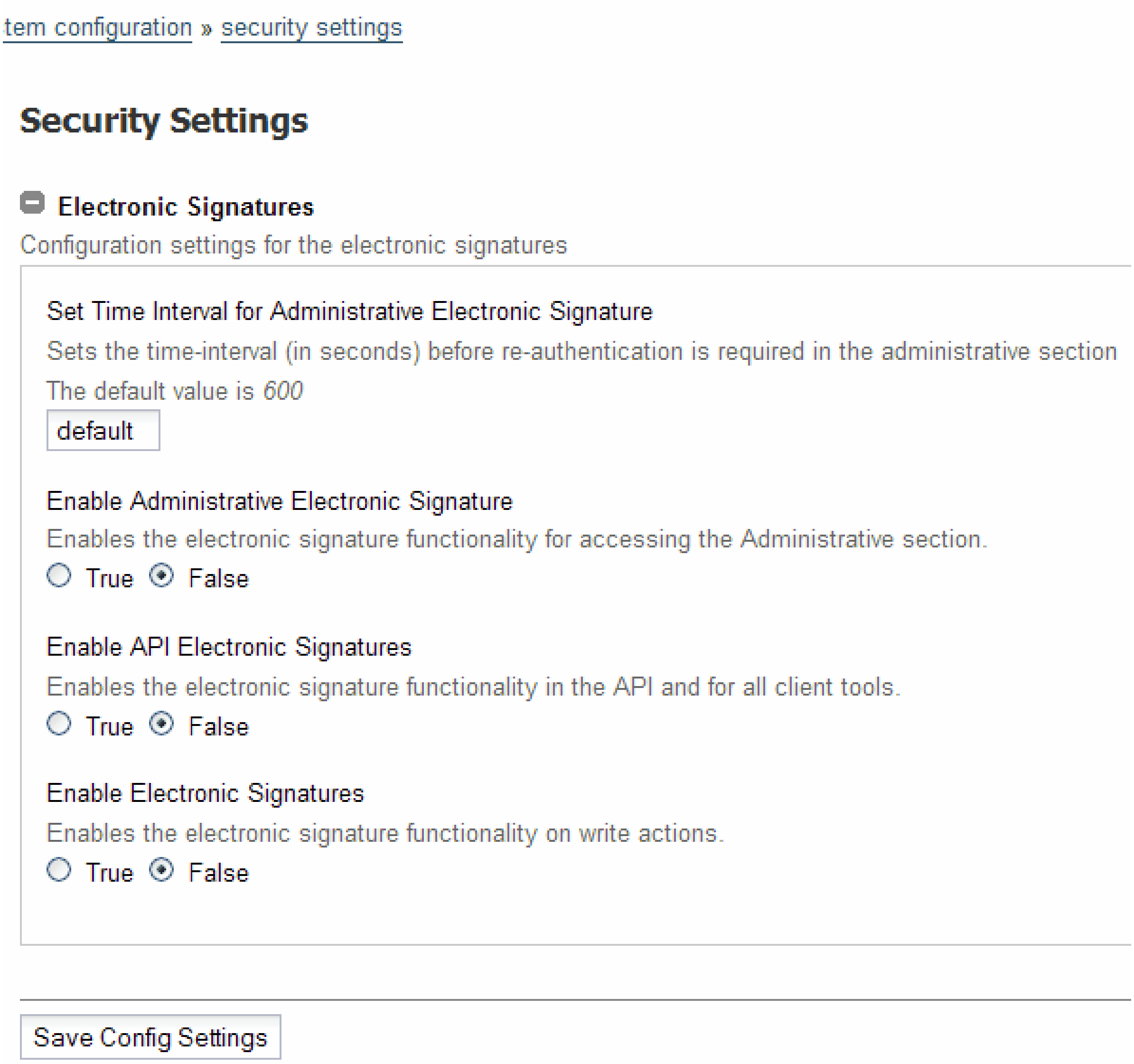
- **Search and Indexing** - configure settings for the Document Indexer, the OpenOffice.org service, and Search



System Configuration - Search and Indexing

3.3.7.7 Security

View and modify security settings, such as Electronic Signatures, in **Administration - System Configuration - Security**.



System Configuration - Security Settings

3.3.7.7.1 Electronic Signatures

KnowledgeTree's Electronic Signatures functionality is an auditing tool that provides additional security for your document management system to facilitate compliance with CFR 21 Part 11.

Enabling electronic signatures forces KnowledgeTree users to enter their username and password to authenticate to the system when adding and editing documents and folders, when changing their personal preferences, and, for admin users, when working in KnowledgeTree's administration module, Administration.

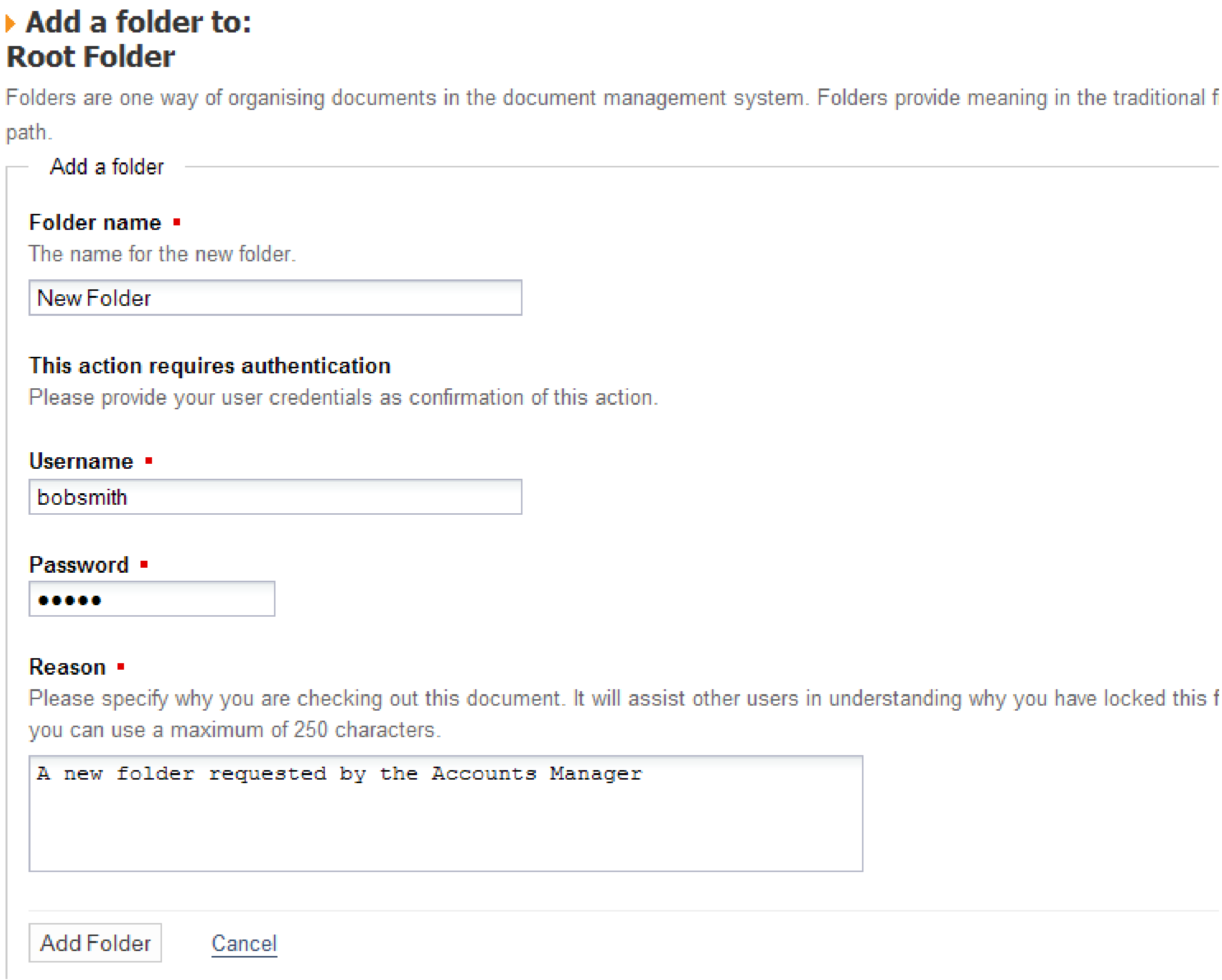


Figure: Adding an electronic signature on the Add Folder action

Audit Trails

The electronic signatures functionality adds the following auditing data to the document or folder transaction history:

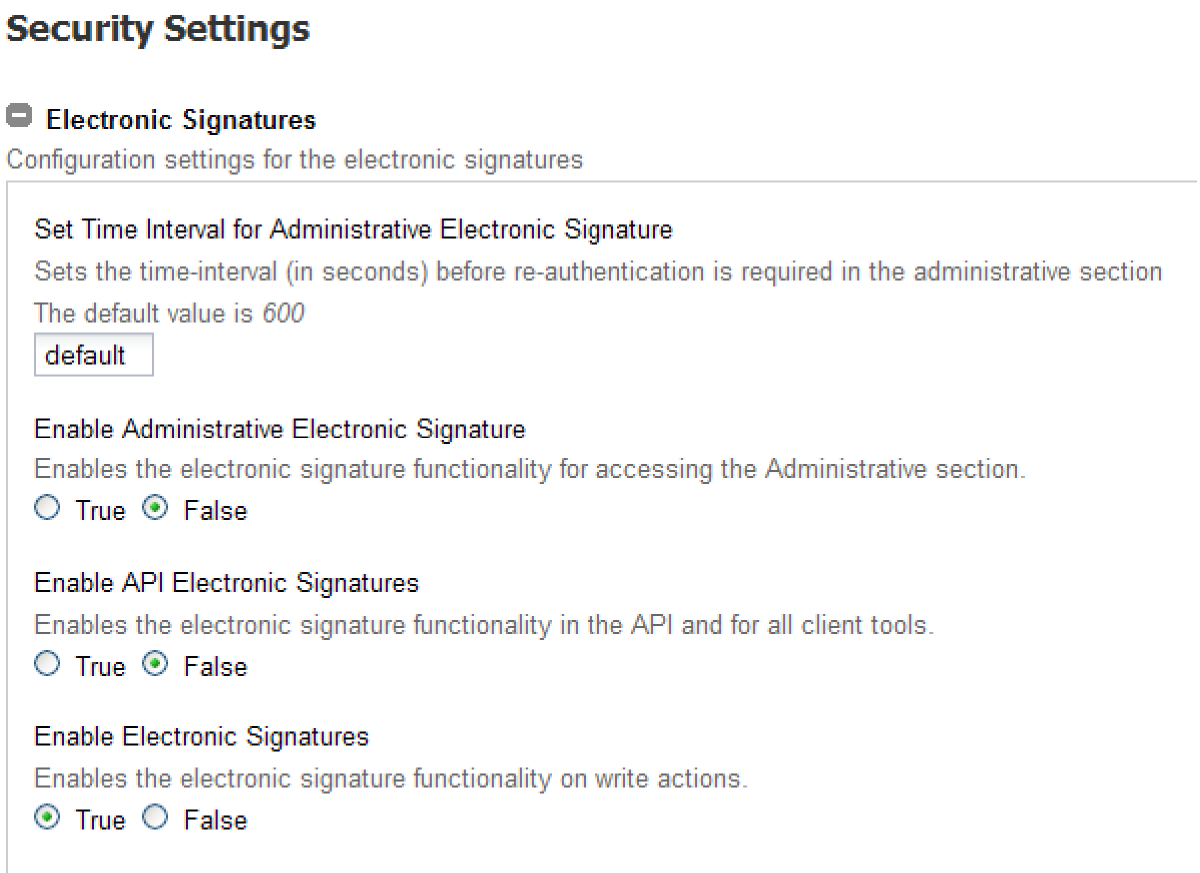
- name of the action
- date and time of the action
  Note: *The time stamp is defined by your server time and time zone.*
- the name of the relevant user
- the comment entered for the action

Configuring Electronic Signatures

Electronic Signatures are configured through KnowledgeTree's Web interface, in **Administration - System Configuration - Security Settings**.

The following settings are configurable:

- the time period (in seconds) before re-authentication is required in the Administration module (default is 600 seconds, i.e. 10 minutes);
- whether electronic signatures are required for accessing the Administration module, Administration - default is False (disabled);
- whether to enable electronic signatures in the KnowledgeTree API, and for KnowledgeTree client tools - default is False (disabled);
- whether electronic signatures are required on 'write' actions (in the Web interface) - default is True



3.3.7.7.2 Configuring Electronic Signatures

This procedure enables and disables Electronic Signatures for KnowledgeTree's Web interface, and for the KnowledgeTree API and KnowledgeTree Client Tools.

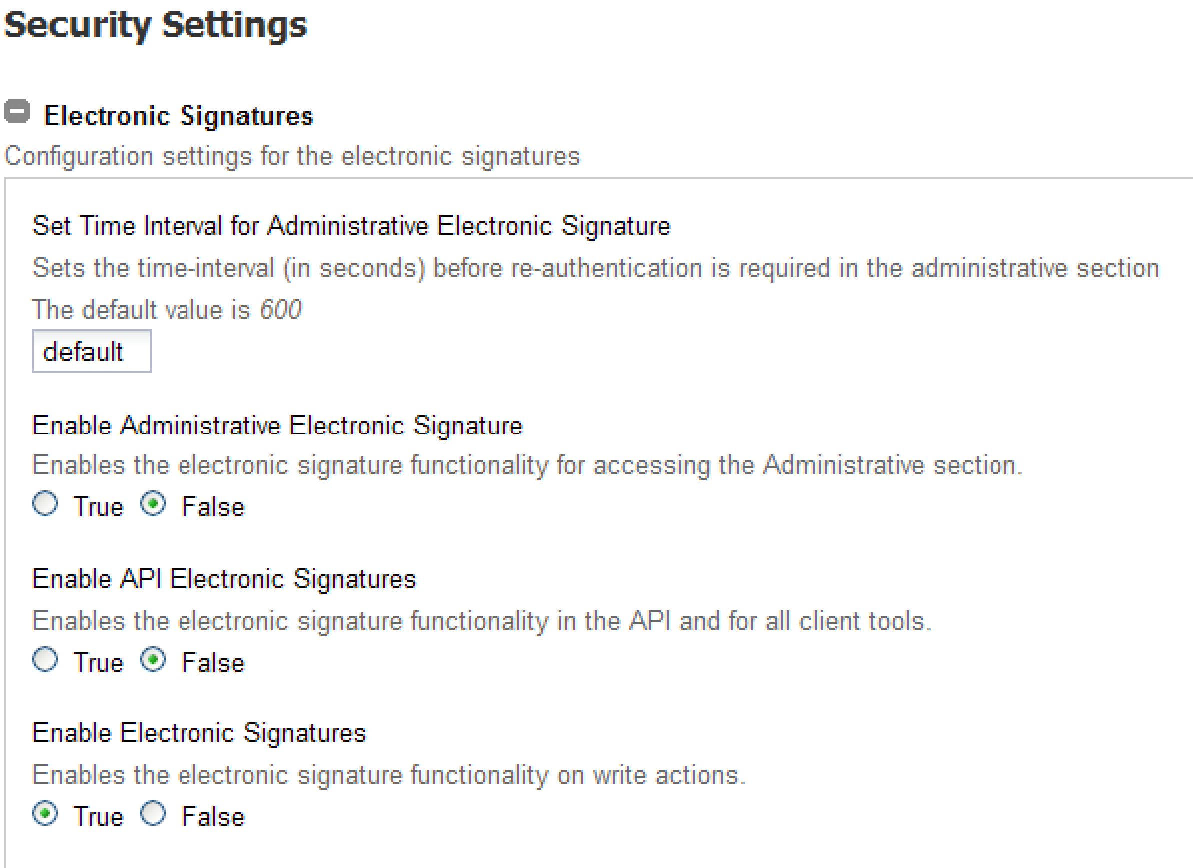
Note: *Electronic Signatures are a security tool that requires users to provide their KnowledgeTree logon username and password to re-authenticate to the system on any 'write' action to documents and folders, and when modifying document and folder metadata. Additionally, on some actions, you may need to provide reasons for your action. Electronic signatures are recorded in the document transaction history, or in the folder transaction history, as applicable.*

Prerequisites:

- KnowledgeTree Commercial Server version 3.6.1 and above

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's web interface; then, go to **Administration - System Configuration - Security**. The Electronic Signatures configuration page displays.



2. **Do you want to ...**
   - **change the time period (in seconds) before re-authentication is required in the Administration module?** Enter a value in the text field for the following setting: **Set Time Interval for Administrative Electronic Signature**. The default value is 600 seconds (10 minutes).

   - **enable electronic signatures in Administration?** Set the value for **Enable Administrative Electronic Signature** setting to 'True'. The default is False (disabled).

   - **disable electronic signatures in Administration?** Set the value for **Enable Administrative Electronic Signature** setting to 'False'. The default is False.

   - **enable electronic signatures in the KnowledgeTree API and for all the KnowledgeTree client tools?** Change the **Enable API Electronic Signatures** setting to 'True'. The default is 'False' (disabled).

- **enable electronic signatures for all 'write' actions that can be performed in KnowledgeTree's web interface?** Set the value for **Enable Electronic Signatures** setting to 'True'. The default is 'False' (disabled).

Note: *Electronic Signatures are implemented for the following actions in KnowledgeTree's Web interface:*
- *Copy, Move, or Delete a document*
- *Check-out / Check-in a document*
- *Cancel a document check-out*
- *Transition a document in a workflow*
- *Rename a document*
- *Edit document metadata*
- *Archive a document*
- *Add or Delete document links*
- *Delete a document link*
- *and, on the following Bulk Actions for documents: Move, Copy, Delete, Check-out*
- *Add, Delete, Modify Document Alerts*
- *Make a document immutable*
- *Start a new workflow*
- *Add a document to a folder*
- *Add and Edit folder permissions*
- *Add and Edit Roles for a folder*
- *Rename, Delete, Copy, Move a folder*

Note: *Electronic signatures are recorded in the transaction history - document actions are recorded in the document transaction history; folder actions are recorded in the folder transaction history. Changes to the electronic signatures functionality are recorded in the general activity logs; access to KnowledgeTree's administration module (Administration) are recorded in the user activity log.*

3.3.7.8 User Interface

Configure the following settings for the user interface through Administration - System Configuration - User Interface:

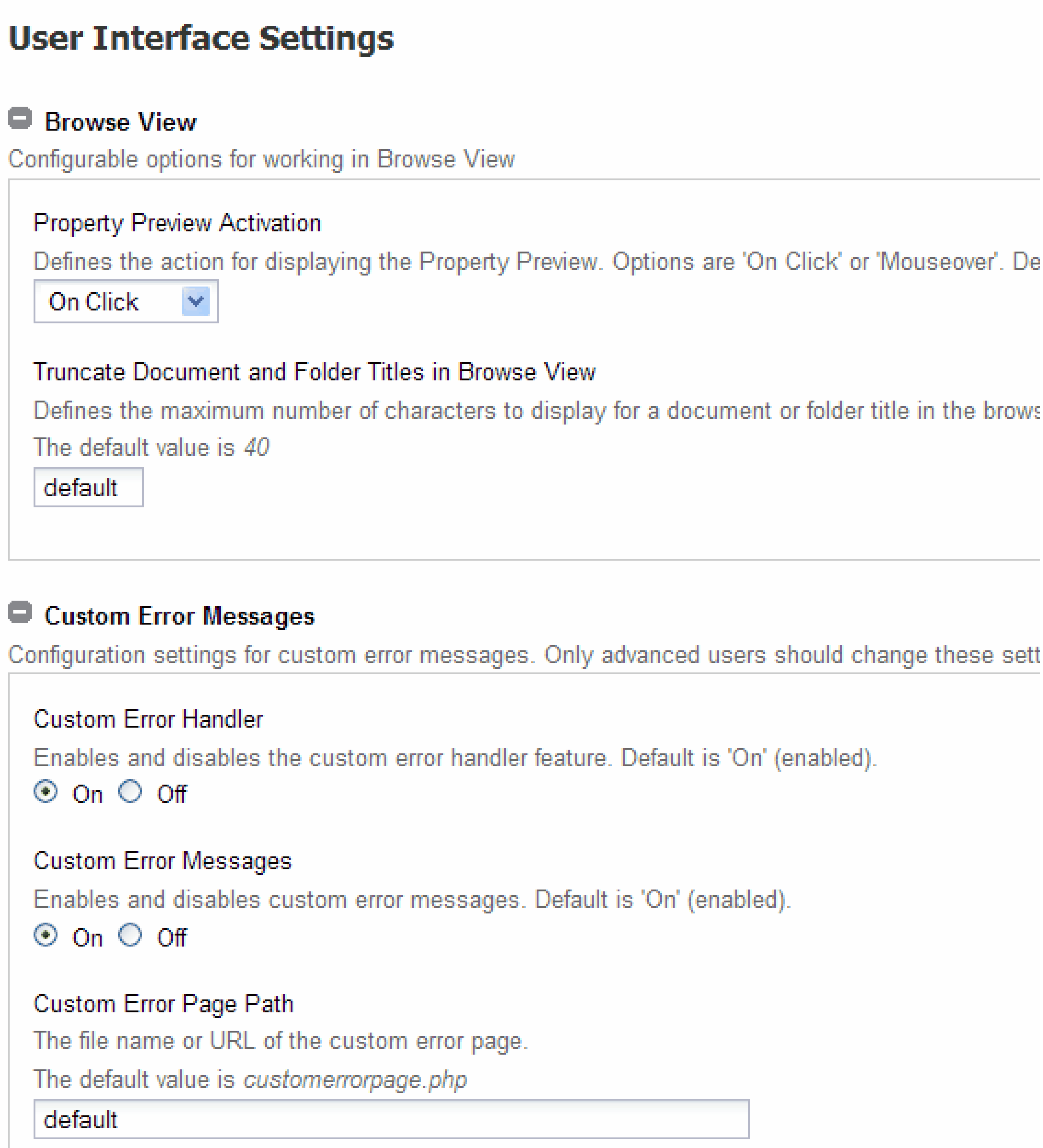
Note: *Some settings are not relevant for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

- **Browse view actions** - defines options for working in the Browse View, including: whether the Property Preview action displays 'on click', or 'mouse-over' (default is 'on-click); and the maximum number of characters to display for a document of folder title in the Browse View (maximum allowable characters is 255; the default value is 40)

- **Custom Error Messages** - configures the following settings: enable/disable the custom error handler and custom error messages (default is 'on' - i.e. 'enabled'); and the custom error path, which is the file name or URL of the custom error page (the default value is customerrorpage.php)

- **User Interface** - configures the following settings:
  - whether to always show a full list of all users and groups without having to click 'show all users' (the default is 'false' - this action is typically available when viewing and configuring users and groups);

- the application name used by KnowledgeTree OEM partners - this name replaces 'KnowledgeTree' wherever the application name displays in the interface (the default value is 'KnowledgeTree');
- whether to automatically refresh the page after the session would have expired;
- the path (relative to the KnowledgeTree directory) to the custom logo for the KnowledgeTree user interface (the default value is /resources/companylogo.png. The logo must be 50px tall, and on a white background);
- alternative text for the title of your custom company logo, for accessibility purposes (the default value is 'Add Company Name');
- the width of your custom company logo, in pixels (the default value is 313px);
- whether to use a condensed (compact) user interface for the KnowledgeTree administrator's view of the KnowledgeTree user interface (the default is 'False');
- location of the dot binary (command location) - on Unix systems, to determine whether the 'dot' application is installed (the default value is 'dot');
- whether browsers may provide an option to open a document from download (default is 'False' - change to 'True' to prevent most browsers from allowing this option);
- whether to use the additional IE-specific GIF theme overrides, which may restrict the functioning of arbitrary theme packs without having GIF versions available (the default is 'False');
- whether custom skins may be used for the KnowledgeTree user interface (default is 'False');
- the location of the custom skin, when skinning is enabled (the default value is 'blue');
- the system URL used in the main logo (the default value is http://www.knowledgetree.com)



System Configuration - User Interface Settings

3.3.8 License Administration

You will need a valid license to activate KnowledgeTree's commercial features, and to have access to the KnowledgeTree Commercial client tools and add-ins.

Note: *This option is not relevant for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

See Also:
- Viewing / Deleting Existing Licenses and Adding New Licenses

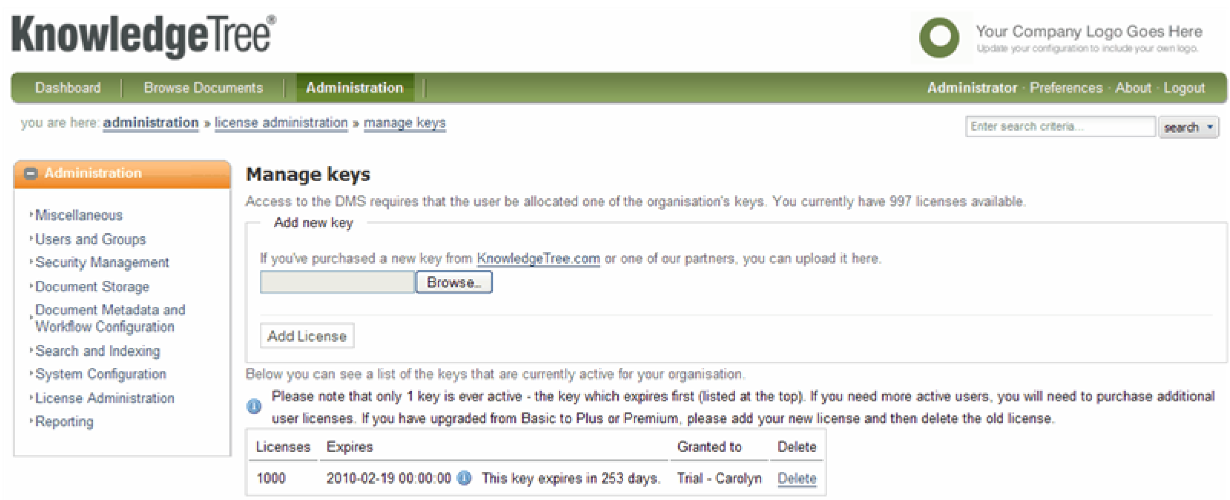


Figure: License management interface for KnowledgeTree Commercial

3.3.8.1 Viewing / Deleting Existing Licenses and Adding New Licenses

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

Commercial Editions Only

Note: *Only the KnowledgeTree Commercial Edition requires a License.*
Note: *This option is not relevant for KnowledgeTreeLive - the hosted, SaaS version of KnowledgeTree Commercial on-premise. View details on the KnowledgeTree Wiki.*

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 **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.

3.3.9 Reporting

You can generate the following types of user activity reports in KnowledgeTree's web interface, in **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.

3.3.9.1 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 **Administration - Reporting - User Reports** to open the report generation interface.

2. **What type of report do you want?**

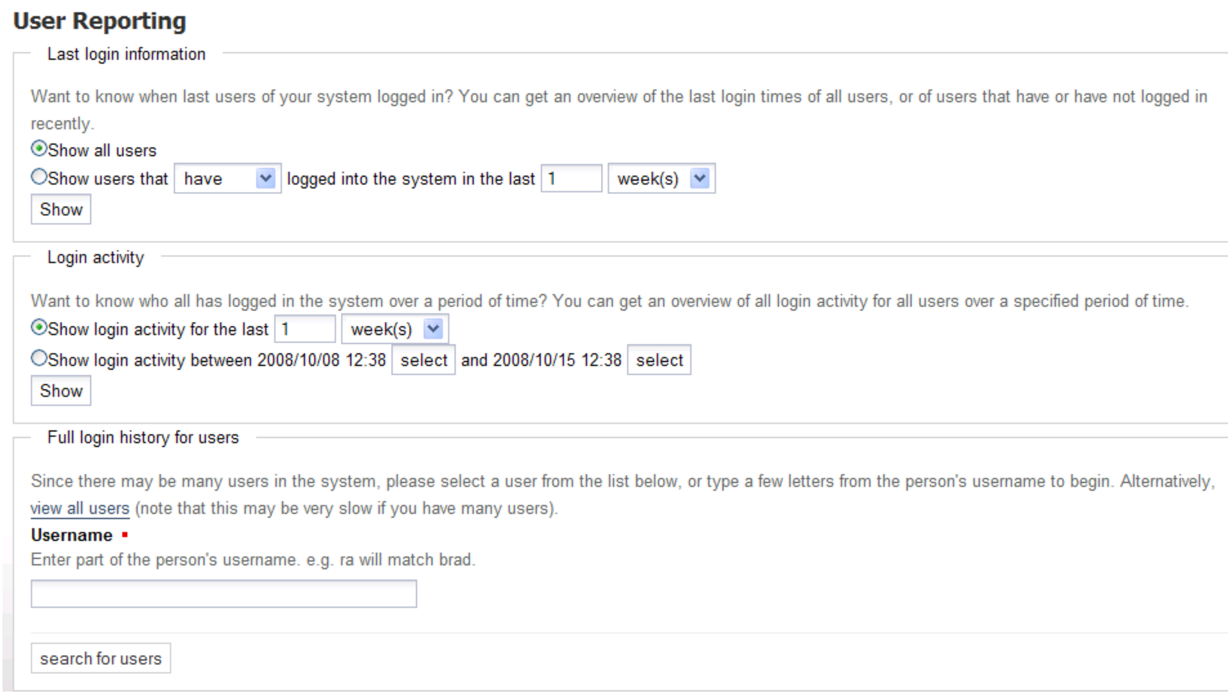
   - **I want to see the last time any system user logged in to the system?** In the Last login information section, select the **Show all users** radio button; then, click **Show**.

- **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.



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