User Manual

KnowledgeTree®

KnowledgeTree 3.7 User Manual

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Part 1

Introduction

1 Introduction

1.1 About this Help

The KnowledgeTree User Manual describes the features and functionality available in the KnowledgeTree document management system. It provides instructions intended for use by end users 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 Organizational Hierarchy

KnowledgeTree organizes system users into users, groups, and roles.

Additionally, the content repository itself may be divided into separately accessed, and separately managed, Units.

Note: Only the KnowledgeTree administrator may add, edit, or delete these entities.

- User - as a KnowledgeTree user, you must belong to one or more groups and/or roles, in order to view and work with KnowledgeTree files and folders. This is because folder permissions may only be assigned to groups or roles, and not to individual users.

- Group - a group (e.g. Editors, Management) contains one or more users, and it may contain one or more sub-groups. Individual users are organized into groups in order to assign the same set of folder permissions to multiple users. You may be added to a group based on, for example, your job description, your department, your location, and so on. Examples of groups include: 'Managers', 'Research', 'Marketing', or 'Accounts', and so on. Groups typically contain two or more users. If your organization has a small number of users, users may be divided into Roles, rather than Groups.

- Role - roles may be used to assign specific permissions to a single user, or a single group (on a per directory basis), typically to perform a specific function in the business process, or in a workflow.

- Unit - the unit concept is a method of dividing up your KnowledgeTree content repository into separately managed and even separately accessed areas. A unit displays as a folder in a pre-defined location of the folder structure, and a unit administrator may be assigned administrator rights on the folder, without having these permissions on the entire system. KnowledgeTree may be configured so that users may only view their unit folder on login.

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.

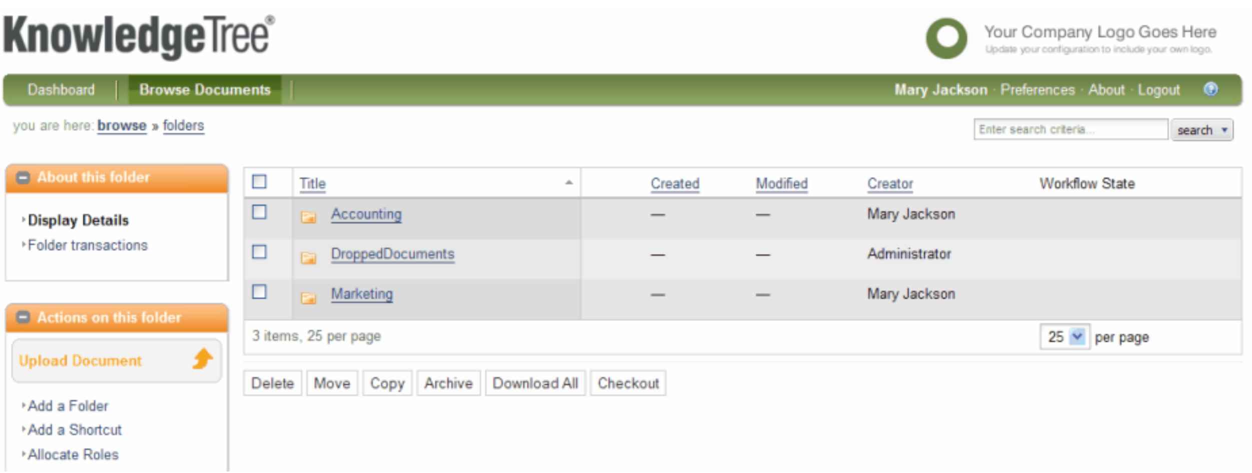
1.3 Folders and Files

Files and folders are typically stored in KnowledgeTree in a familiar folder/file hierarchy, and document metadata is used as a storage and retrieval mechanism.

Note: Metadata includes information about the document, such as: tags, document types, document IDs, versioning, file types, and other user-specified information (relevant to the document type).

Folders and documents are secured through KnowledgeTree's Permissions structure - you will not be able to view or work with any content where you do not have appropriate permissions on that content (permissions are set up by your system administrator).

There are various ways of accessing stored documents and folders, including:
- navigating through the folder structure in Browse Documents,
- using search - simple, advanced, and saved searches,
- click on tags in the dashboard tag cloud,
- clicking on the dashboard Quicklinks,
- shortcuts,
- rss feeds,
- subscriptions,
- clicking links in the following dashlets: Recently viewed, Checked out, Downloaded documents or folders.



1.4 Permissions

KnowledgeTree controls access to documents and folders through the permissions structure.

Permissions are assigned on folders, by:

- Group - permissions are assigned to groups. When users are added to the group, they acquire the permissions of the group.

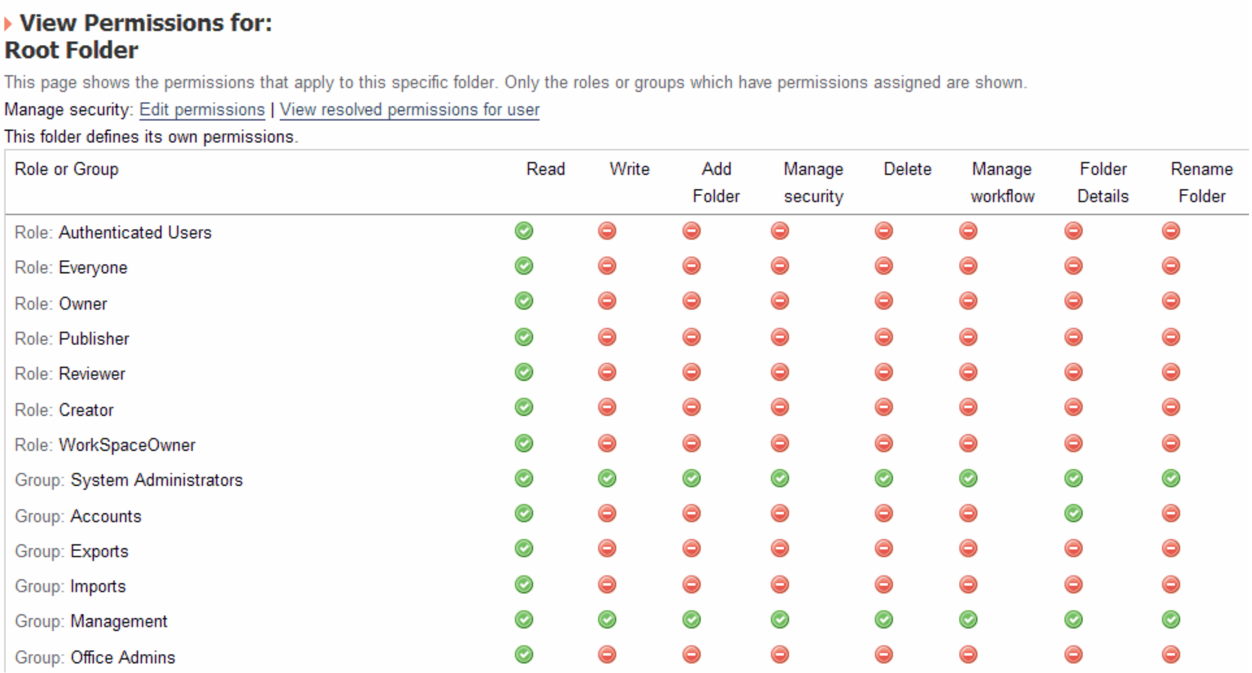
- Role - permissions are assigned to roles. When a role is assigned to a user, the user acquires the permissions of the role.

Note: To view a folder in KnowledgeTree, you must belong to a Role or to a Group that has at least the 'read' permission on the folder.

View permissions on a folder

To view permissions on a specific folder, navigate to the folder in Browse Documents; then, click the *Permissions* link in the Actions on this folder menu to view the permissions set up on the folder.
See also:

- Viewing Folder Permissions
- Viewing Document Permissions



View Permissions for: Root Folder

This page shows the permissions that apply to this specific folder. Only the roles or groups which have permissions assigned are shown.

Manage security: Edit permissions | View resolved permissions for user

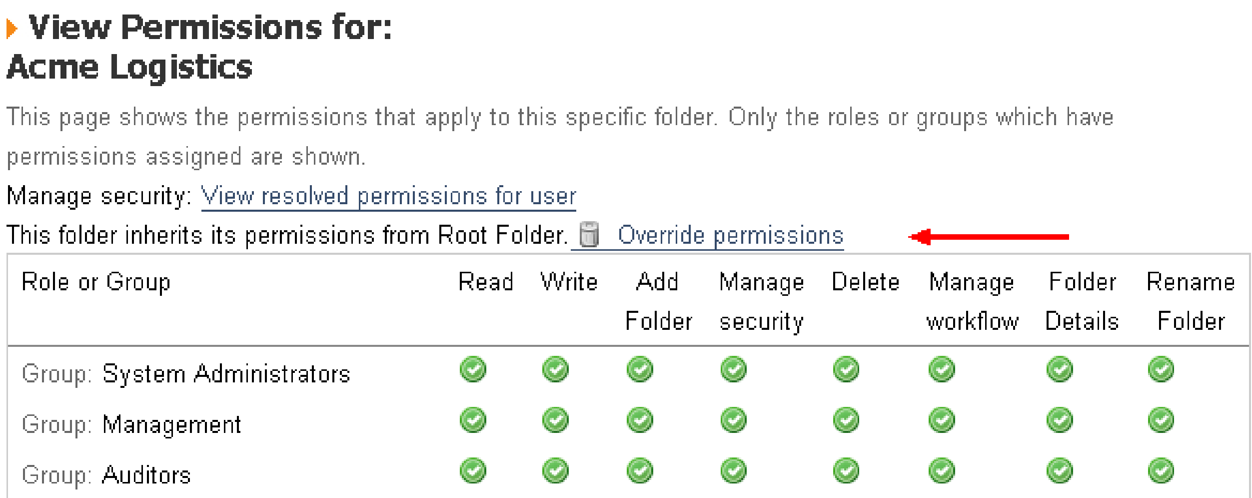
This folder defines its own permissions.

Role or Group	Read	Write	Add Folder	Manage security	Delete	Manage workflow	Folder Details	Rename Folder
Role: Authenticated Users	✓	✗	✗	✗	✗	✗	✗	✗
Role: Everyone	✓	✗	✗	✗	✗	✗	✗	✗
Role: Owner	✓	✗	✗	✗	✗	✗	✗	✗
Role: Publisher	✓	✗	✗	✗	✗	✗	✗	✗
Role: Reviewer	✓	✗	✗	✗	✗	✗	✗	✗
Role: Creator	✓	✗	✗	✗	✗	✗	✗	✗
Role: WorkSpaceOwner	✓	✗	✗	✗	✗	✗	✗	✗
Group: System Administrators	✓	✓	✓	✓	✓	✓	✓	✓
Group: Accounts	✓	✗	✗	✗	✗	✗	✓	✗
Group: Exports	✓	✗	✗	✗	✗	✗	✗	✗
Group: Imports	✓	✗	✗	✗	✗	✗	✗	✗
Group: Management	✓	✓	✓	✓	✓	✓	✓	✓
Group: Office Admins	✓	✗	✗	✗	✗	✗	✗	✗

View folder permissions

Enabling / Disabling Inherited Permissions

By default, permissions on a folder also apply to the folders below it (its sub-folders). This is called 'permissions inheritance'. You can also *override* and re-instate inherited permissions at any time, but you must have the 'Manage Permissions' permissions on a folder to enable or disable 'Permissions Inheritance'.



View Permissions for: Acme Logistics

This page shows the permissions that apply to this specific folder. Only the roles or groups which have permissions assigned are shown.

Manage security: View resolved permissions for user

This folder inherits its permissions from Root Folder. Override permissions

Role or Group	Read	Write	Add Folder	Manage security	Delete	Manage workflow	Folder Details	Rename Folder
Group: System Administrators	✓	✓	✓	✓	✓	✓	✓	✓
Group: Management	✓	✓	✓	✓	✓	✓	✓	✓
Group: Auditors	✓	✓	✓	✓	✓	✓	✓	✓

What are KnowledgeTree's default permission types?

KnowledgeTree provides the following default permissions:

Permission	Description
Read	allows you to view a document and its metadata. The Search and

	Browse function only returns content where you have at least the 'read' permission.
Write	allows you to change the content of a document and its metadata, to perform the check out / check in action, and to create new documents in folders where you have the 'write' permission.
Add Folder	allows you to create and edit folders where you have this permission on the parent folder.
Manage Security	allows you to set up and edit security options on the folder and on its' content, including editing permission and allocating roles that have permissions on the folder.
Delete	allows you to delete files and folders, where you have this permission on the parent folder.
Manage Workflow	allows you to change workflow settings on a document (e.g. perform a transition)
Folder Details	allows you to view details related to the folder name, and to view a transaction history.
Rename Folder	allows you to rename a currently selected folder.

1.5 Version Control

KnowledgeTree provides the following version control mechanisms:

⊟ 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.

See Also:
- Checking-out documents (KnowledgeTree's web interface)
- Canceling check-out

⊟ Check in

Checked-out documents must be checked back in to KnowledgeTree before other users can check it out 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 to check it in.

See Also:
-
- Checking in documents (KnowledgeTree web interface)
- Adding new documents (KnowledgeTree web interface)

⊟ Incremented Versions

New documents are given version number 0.1.

Minor updates are incremented by 0.1 on check in (e.g. from 0.7 to .0.8); major updates are incremented by 1.0 (e.g. 1.x becomes 2.0). Edits are defined as 'major' or 'minor' on check in.

Version History

The Version History link in the Document info menu displays a history of version changes on a currently selected document.

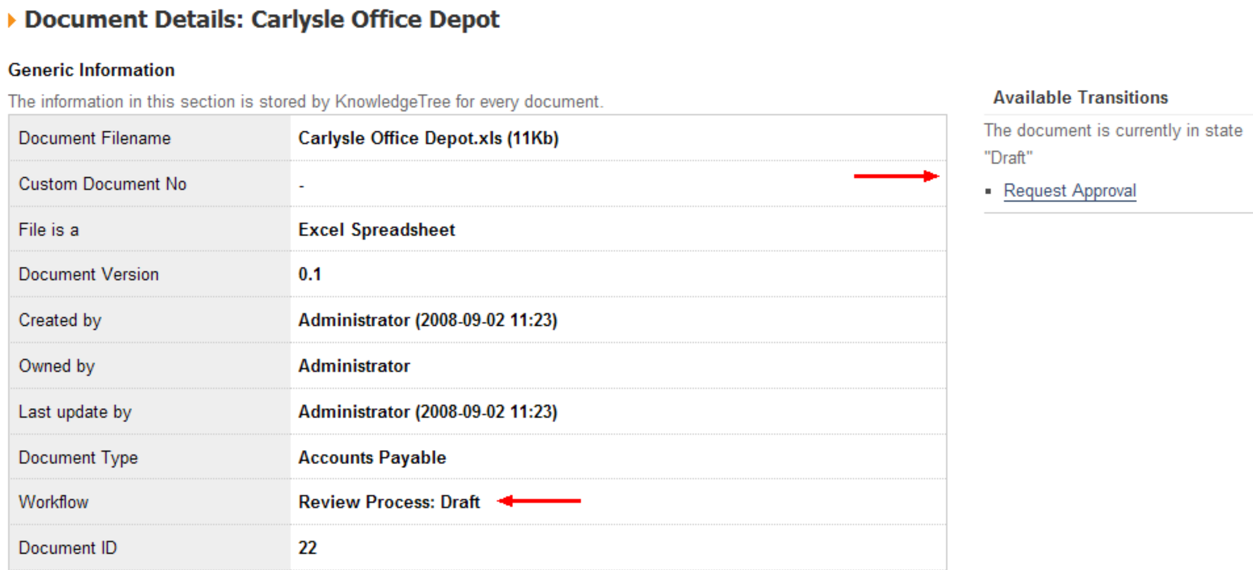
See Also:

- Viewing document transaction history

1.6 Workflows

Workflows are a document lifecycle tool that assigns a business process to selected KnowledgeTree documents. The KnowledgeTree administrator creates and adds workflows to KnowledgeTree, based on your organizational business processes - workflows comprise a series of pre-defined states and transitions that a document must pass through before it is considered complete.

Any KnowledgeTree user may be involved in a document workflow. Some documents, such as tenders, may have complex workflows involving several people, both internal and external to your organization.


Document Details: Carlysle Office Depot

Generic Information

The information in this section is stored by KnowledgeTree for every document.

Document Filename	Carlysle Office Depot.xls (11Kb)
Custom Document No	-
File is a	Excel Spreadsheet
Document Version	0.1
Created by	Administrator (2008-09-02 11:23)
Owned by	Administrator
Last update by	Administrator (2008-09-02 11:23)
Document Type	Accounts Payable
Workflow	Review Process: Draft
Document ID	22

Available Transitions

The document is currently in state "Draft"

- Request Approval

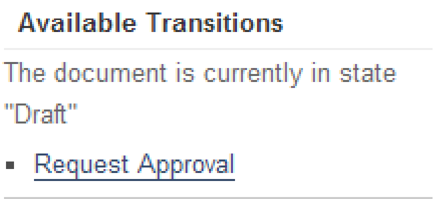
A document in a workflow

What are States and Transitions?

Workflows consist of 'states' and 'transitions'.

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

- Transitions - transitions define how documents move between states in the workflow. Transitions are actions that move a document to the next state. For example, an Invoice document type may start in the state 'generated', after which it may be moved by the transition 'sent to client' to the state 'billed'. Permissions may affect transitions in a workflow component called a 'guard trigger', where only users with the appropriate permissions may be allowed to perform the transition.



⊟ What are Workflow Effects (Actions)?

Workflow Effects, set up by the system administrator, are used to grant, restrict, or deny access to your KnowledgeTree documents, based on the document's workflow state, For example, when a document reaches the relevant state, the state permissions may only allow users with the appropriate permissions to work on the document. In this example you may want to prevent documents in a Publication workflow from being checked out after they reach the state 'published'.

Notifications may also be set up as a Workflow Effect, to send notifications to selected roles or groups when the document reaches a particular state.

⊟ How are Workflows Assigned?

A document in the repository may have only one workflow attached to it at any given time. Although workflows are not automatically attached to new documents when they're added to the repository, the administrator may configure the system to assign workflows when new documents are created, or to assign workflows only to specific documents.

You may manually assign a workflow to a document you're working on, provided you have the required permissions, and the document is not part of a workflow by default (some document types may be automatically assigned to workflows).
Note: You cannot overwrite a document's current workflow.

See Also:
For more information about KnowledgeTree Workflows, and how to plan and add complete workflows, see the KnowledgeTree Administrator Manual.

Part 2
Getting Started

2 Getting Started

2.1 Logging on

This procedure logs you in to KnowledgeTree's web interface.

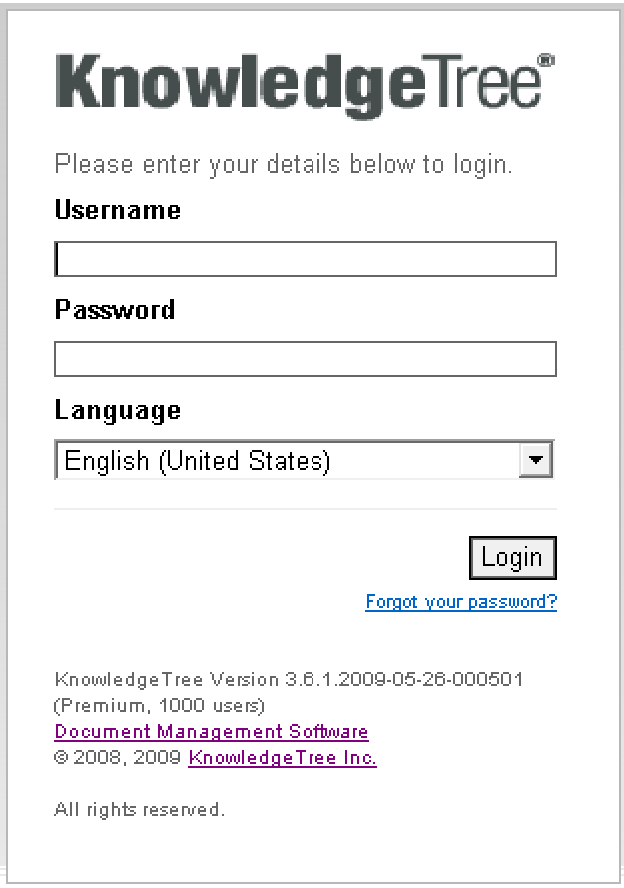
Prerequisites:
- Obtain the URL (server address) to your KnowledgeTree domain (KnowledgeTreeLive, or KnowledgeTree on-premise) from your system administrator
- Obtain your KnowledgeTree username and password from your system administrator

Perform the following steps:
1. Use your web browser to open your KnowledgeTree domain, e.g. https://dms.acme.com.

2. On the KnowledgeTree Login page, enter your KnowledgeTree username and your KnowledgeTree password.

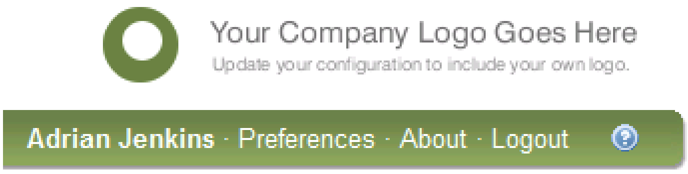
3. Choose a language for the interface, if alternative languages are available for your installation. The default is English (US).

4. Click *Login*. KnowledgeTree's web interface opens at the dashboard.



2.2 Logging off

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



2.3 KnowledgeTree 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 procedures documented in this manual allow you to run a variety of searches through 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

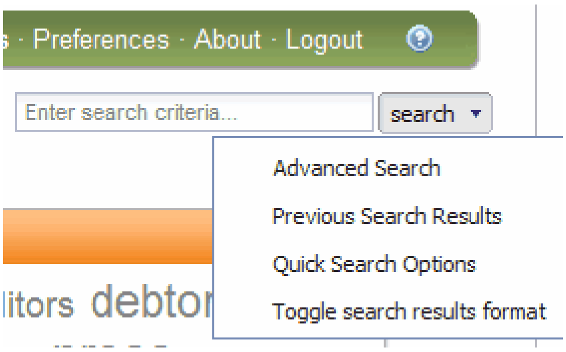
Note on search results:

- *Search results include document and folders, and any shortcuts to documents and folders that match specified search criteria.*
- *Search results exclude words less than 4 characters, e.g. 'the', 'for'*

- *Displayed results are permission-based - you need at least the 'read' permission on returned items*
- *Search relies on data extracted during indexing*
- *By default, search results do not included archived and/or deleted documents. To include archived and/ or deleted documents in search results, include the following search criteria in an advanced search: isdeleted, isarchived.*

The Search Portlet
Access to search is provided through KnowledgeTree's web interface Search portlet, which is located at the top right of the page in all sections of the document management system interface. The search portlet comprises a text entry field, a search button, and a drop down menu with the following options:

- Advanced Search
- Previous Search Results
- Quick Search Options - includes the following sub menu items: 'content and metadata', and 'metadata'
- Toggle search results format - define how results display. Options are: search engine format, and Browse view format



Search Portlet

2.3.1 Running a Quick (Simple) Search

This procedure performs a quick search on KnowledgeTree documents and folders.

By default, quick search is on content and metadata, including:
- metadata field values
- filename
- full path
- document ID
- document content
- discussions

Note: 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.

Perform the following steps:

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'

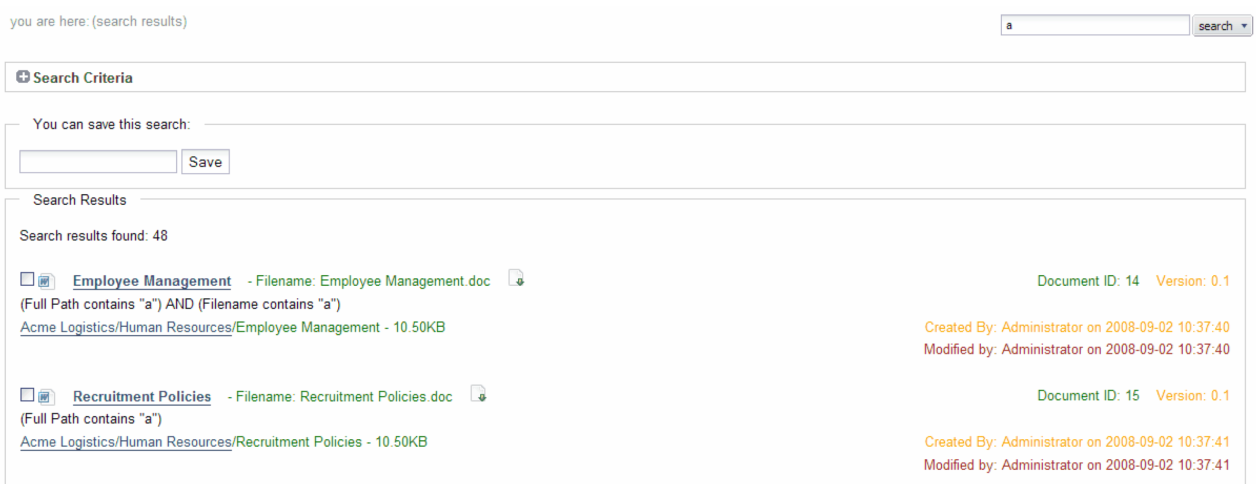
Note: Content search results match exact phrases and highlight partial matches. All database queries (metadata) match partially.

- 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'.

2. Press Enter, or click the *search* button; then, view search results.



Results of a quick search - searched on 'a'

2.3.2 Running an Advanced Search

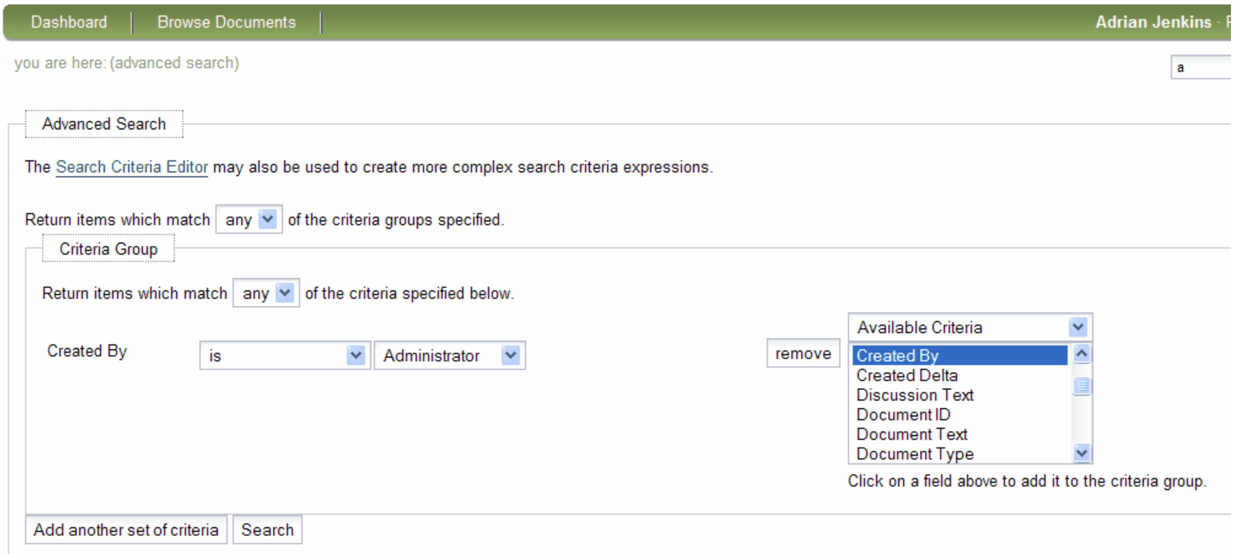
This procedure performs an advanced search on KnowledgeTree documents and folders.

Perform the following steps:

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.



Advanced Search criteria

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*.

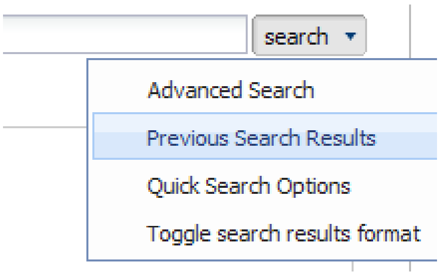
2.3.3 Viewing Previous Search Results

This procedure displays the results of a previous search.

Perform the following steps:

1. Open KnowledgeTree's web interface.

2. On the search drop-down menu, select *Previous Search Results*. View search results.



2.3.4 Running a Complex Search

This procedure performs a quick search on KnowledgeTree documents and folders.

By default, quick search is on content and metadata, including:

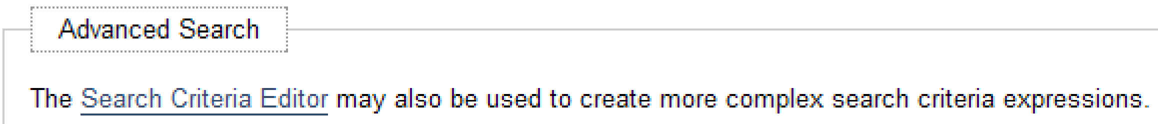
- metadata field values
- filename
- full path
- document ID
- document content
- discussions

Note: 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.

Perform the following steps:

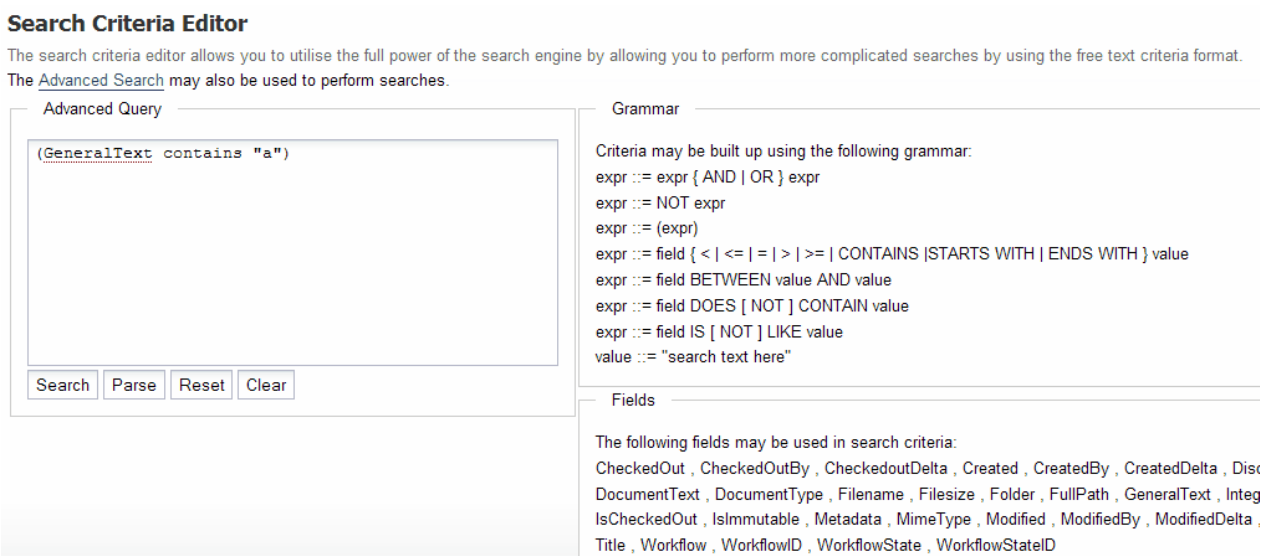
1. Open KnowledgeTree's web interface; then, in the search drop down menu, select *Advanced Search* to open the Advanced Search page.

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



3. In the Search Criteria Editor, 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



Search Criteria Editor

2.3.5 Saving a Search

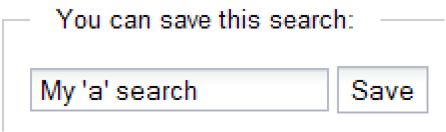
This procedure saves a search you create and run in KnowledgeTree's Web interface.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, create the search you require:
   - quick search
   - advanced search
   - complex search

2. View search results; then, on the search results page, in the section headed You can save this search, define a name for the search.

3. Click *Save*.



2.3.6 Running a Saved Search

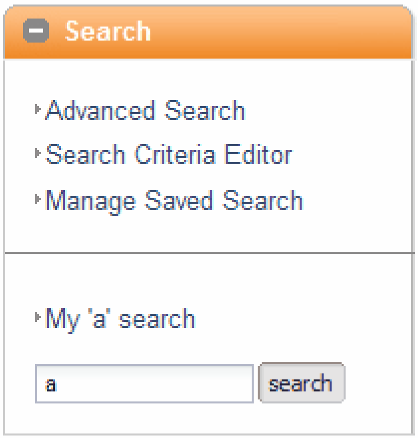
This procedure runs a saved search.

Perform the following steps:

1. Log into KnowledgeTree's web interface; then, 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.

2.3.7 Managing Saved Searches

This procedure edit, deletes, shares, and runs existing saved searches, and saves a new search.

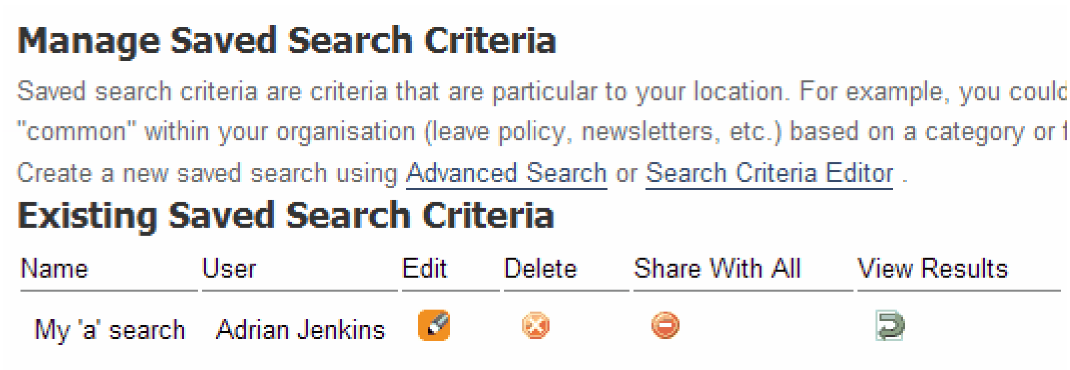
Perform the following steps:

1. Log into KnowledgeTree's web interface; then, 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 (View Results)



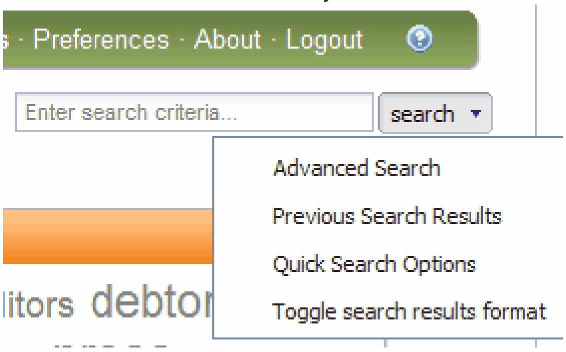
2.3.8 Toggling Search Results Format

This procedure defines how your search results display in KnowledgeTree's web interface - either in search engine format, or in browse view format.

Perform the following steps:

1. Log in to KnowledgeTree's web interface.

2. Locate the 'search' portlet at the top right of the page beneath the navigation bar; then, click the down arrow adjacent to the search button to display the search options menu.

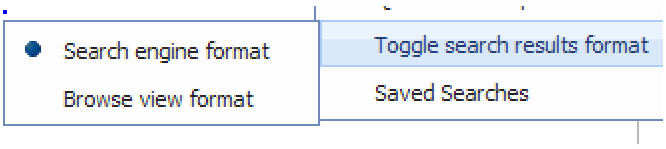


Search Portlet

3. Select *Toggle search results format*; then, select either of the following options:

- Search engine format

- Browse view format



Part 3

Working in KnowledgeTree's Web Interface

3 Working in KnowledgeTree's Web Interface

This chapter is a reference and guide to using the features and functionality in KnowledgeTree's web interface.

IMPORTANT - ELECTRONIC SIGNATURES!
When KnowledgeTree's electronic signatures functionality is enabled for your system, you will need to re-authenticate (enter your KnowledgeTree username and password) when performing most actions through KnowledgeTree's web interface.

Users have access to the following tabs in the Web interface:

- Dashboard - the main page of KnowledgeTree's web interface, providing access to RSS Feeds, Tag Clouds, Search, and links to various documents (recently checked out / quicklinks, etc.)

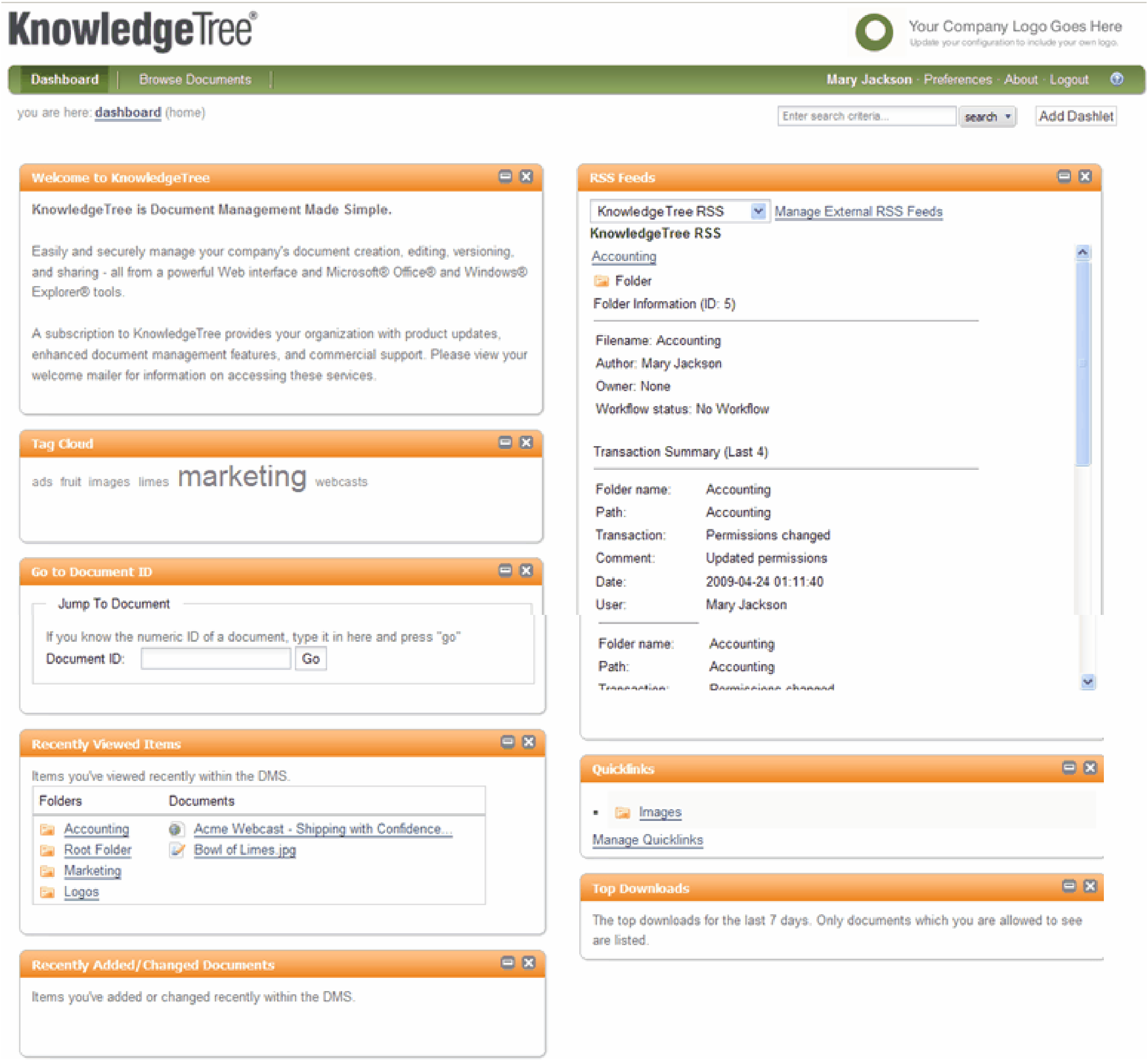
- Browse Documents - provides access to the repository folder structure and content in the document management system, including folder and document actions.

- Preferences - use this tab to define or edit your KnowledgeTree user profile, including your password.

- About - displays copyright information, contact information for KnowledgeTree Sales, links to resources, contributor acknowledgements, and links to the third party software used in KnowledgeTree.

- Logout - use this button to end your current working session

Note: The KnowledgeTree system administrator and other users with system administrator privileges will see an additional tabbed section on the KnowledgeTree web interface - DMS Administration. KnowledgeTree is configured and managed almost entirely through DMS Administration.

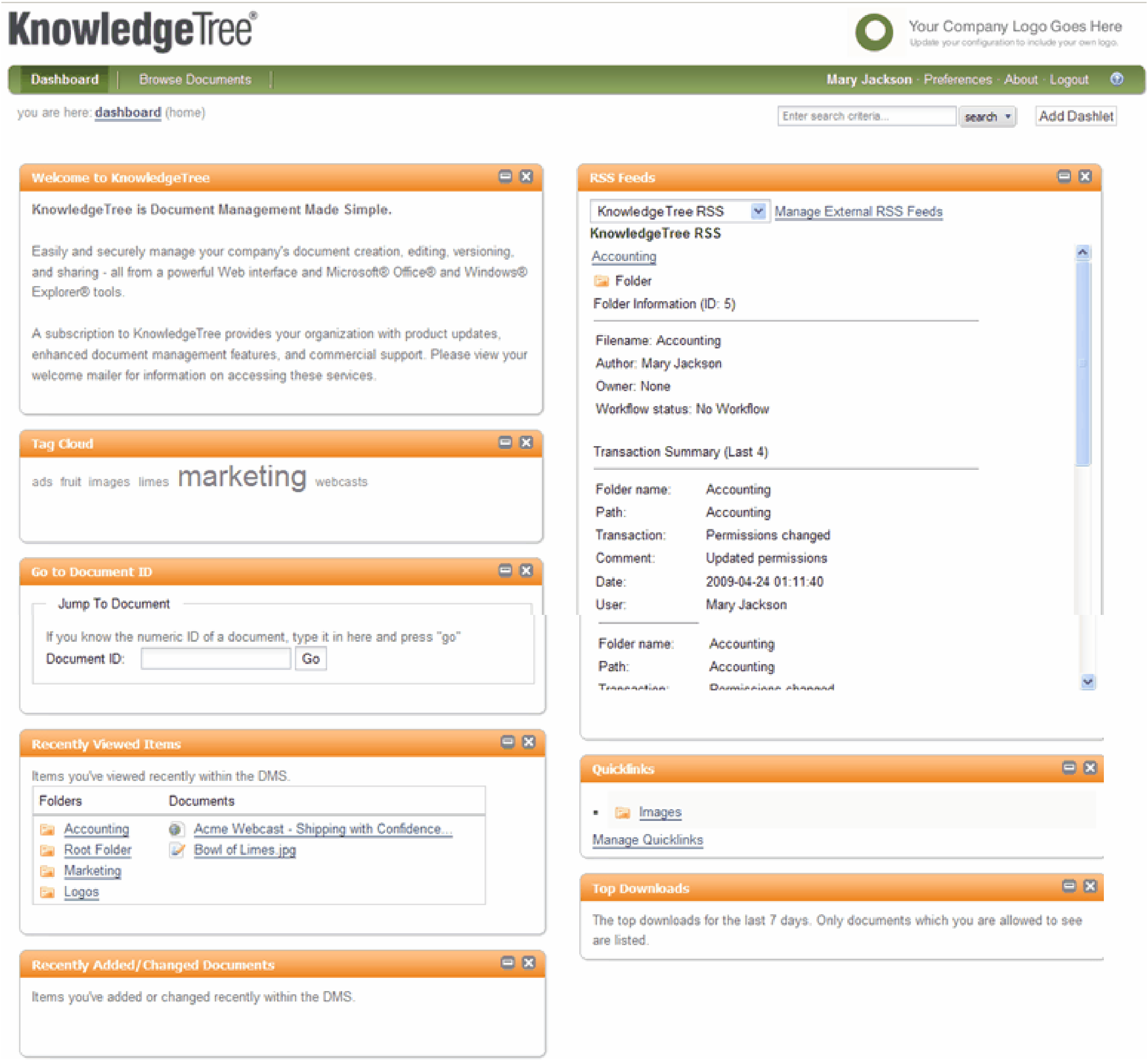


KnowledgeTree Dashboard

3.1 Dashboard

The KnowledgeTree Dashboard is the 'Home Page' of your document management system. By default, KnowledgeTree opens at the Dashboard after you log in.

Note: Some items on the dashboard are only available in KnowledgeTree Commercial Editions, which includes KnowledgeTreeLive.



KnowledgeTree Dashboard

Action

Search - Use the Search bar to perform simple or advanced searches of the repository. This document provides full instructions for using KnowledgeTree's search.

Dashlets

The dashboard contains a number of dashlets relevant to your login user profile, such as a list of any documents you have checked out, and other items requiring your attention.

- Welcome ... A Welcome message for your organization's implementation of the document management system. The administrative user may customize this message or display the default text.

- Go to Document ID - enter the Document ID in the dashlet to go directly to the document in KnowledgeTree. **Commercial Editions Only**
  Note: If the document ID references an archived document, an onscreen form allows you to request that the document is restored to KnowledgeTree's content repository from the archive.

- Your Checked-out Documents - lists any documents you currently have checked out of KnowledgeTree. **Commercial Editions Only**

- Quicklinks - displays predefined links to frequently accessed documents. **Commercial Editions Only**

- Top Downloads - lists the 5 documents most downloaded from KnowledgeTree in your organization, over the past 7 days. Only documents for which you have at least the 'read' permission is included in the list. **Commercial Editions Only**

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

- Tag Cloud - displays tags defined by all KnowledgeTree users. Click on a tag to view a permissions-restricted list of content associated with the selected tag. *How can I add and use tags?*

- RSS Feeds - displays existing RSS feeds on external content (blogs, external websites, etc.) and on internal content. Click on the link in the dashlet to add, edit, or remove RSS feeds. How do I add RSS feeds?

- Orphaned Folders - lists folders that you need to be allowed to access, but not through browsing or navigating the folder structure, due to permission restrictions on your user profile at higher layers of the folder structure.

- My Dropped Documents - your personal workspace for use with KnowledgeTree Drop Box; lists the five most recent document uploaded through KnowledgeTree Drop Box. Click the link in the dashlet to view your Dropped Documents folder, where you can view all documents uploaded through KnowledgeTree Drop Box, and from where dropped documents may be moved or copied elsewhere in the system.

- WebDAV Connection Information - displays instructions for connecting to your WebDAV server.

- Recently Added/Changed Documents - displays a permissions-based list of last 5 documents added or modified by any KnowledgeTree user, but is restricted to those documents for which you have at least the 'read' permission.

- 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, such as alerts.

3.1.1 Notifications and Alerts

KnowledgeTree's Notifications functionality can alert you when changes are made to folders where you have subscriptions set up, and when your input is required on a workflow.

Subscription and Workflow notifications display on the Web interface dashboard, and may be sent to you via email, if you have this function enabled on your user profile in the Preferences tab.

Find out more about Notifications and Alerts in the following topics:
- Configuring alerts - setting up alerts on documents
- Using Subscriptions - subscribing to documents, folders, and subfolders
- Viewing/Editing User Profile - enabling email notification
- Workflows - about workflow alerts

3.1.2 Configuring the Dashboard

This procedure configures your view of KnowledgeTree's web interface dashboard by moving, hiding, or minimizing dashlets.

Perform the following steps:
1. Log on to KnowledgeTree. The dashboard opens by default, or, click Dashboard on the toolbar to open the dashboard.

2. Do you want to ...
   - move a dashlet to another location on the page? Left click on the dashlet; then, hold down the mouse button while dragging the dashlet. Release the mouse button when the dashlet is positioned as required.

   - temporarily remove the dashlet from the dashboard? Click the dashlet's *Close* button.

   - display a hidden dashlet? Click *Add Dashlet* to display a list of hidden dashlets; then, click on an item in the list to display the required dashlet. Click *close* to close the Add Dashlet screen.

   - minimize the dashlet to hide the dashlet informational text? Click the dashlet's *minimize* button.

   - display hidden dashlet text? Click the dashlet's *maximize* button.

3.1.3 Adding / Editing Quicklinks

This procedure adds new quicklinks, and changes the way quicklinks display on the dashboard.

Commercial Editions Only
Note: This functionality is only available in KnowledgeTree Commercial Editions, including KnowledgeTreeLive.

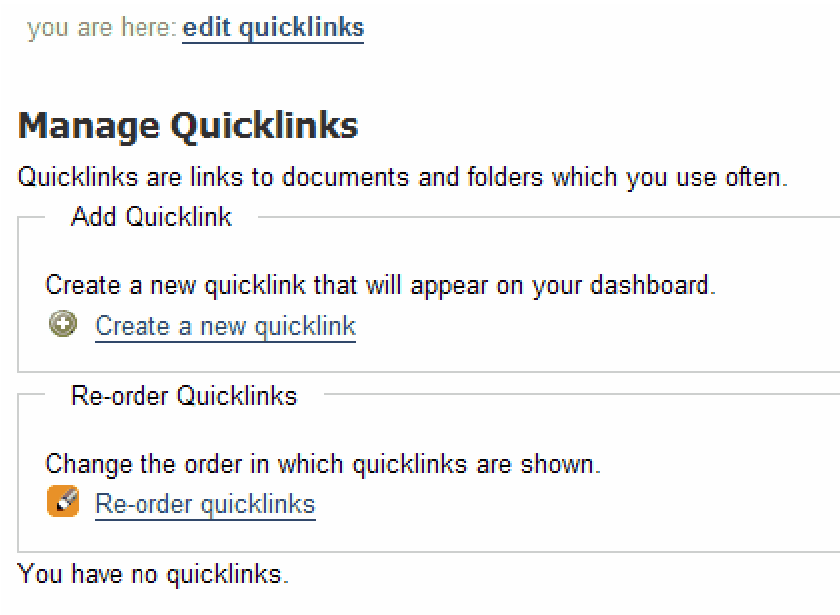
Perform the following steps:

1. Log in to KnowledgeTree's Web interface. By default, the system opens at the dashboard.

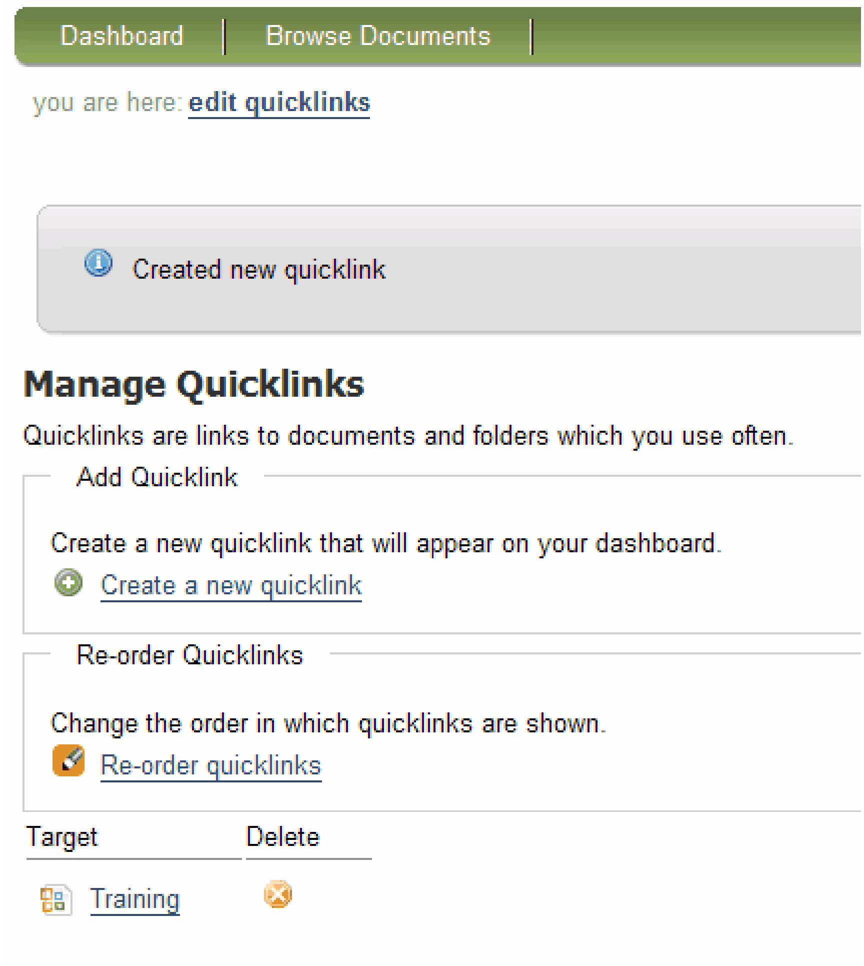
2. In the Quicklinks dashlet click *Manage Quicklinks* to open the Quicklinks configuration screen.

3. Do you want to ...
   - add new quicklinks? Click *Create a new quicklink* to open the New Quicklink page. Browse the folder collection to find the target folder or document for this quicklink. When you're done, click *Link*. The quicklink displays on the Manage Quicklinks page, and on the Dashboard.

   - change the list order of existing quicklinks? Click *Re-order quicklinks* to open the Re-order Quicklinks page. View the current order of links; then, use the up and down arrows in the table to change the list order or links that are listed in the Item column. When you're done, click *Re-order*.



Add New Quicklink



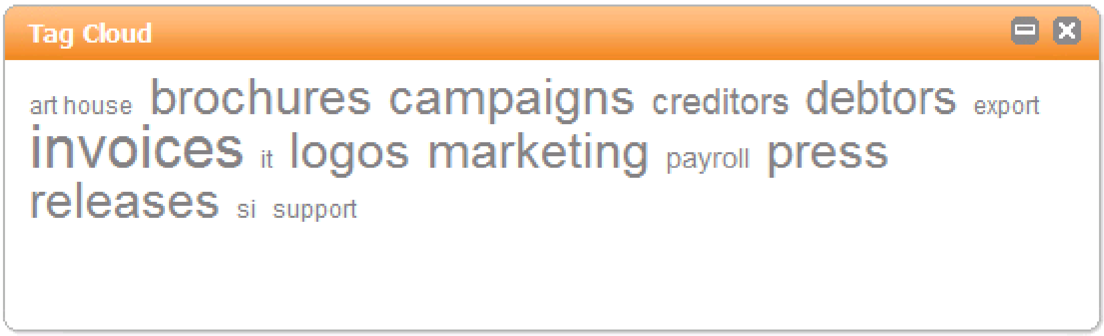
View existing Quicklinks

3.1.4 Tag Clouds

Tag Clouds are a method of sorting and finding repository content based on predefined, custom, categories - i.e. tags. Metadata tags are typically keywords that are associated with a document or folder.

The Tag Cloud dashlet on the dashboard displays all unique tags added by users in the organization. Tagging is a collaborative effort - any logged in user can view all the tags added by other users of the document management system. This allows an intuitive organization of repository content, based on the collective understanding of user's in the organization, and often mimics the organization's 'way of working'.

Clicking on a tag launches a search action that returns a permissions-based list of all content that is associated with the currently selected tag. 'Tagging' and Tag Clouds provide users with a visual overview of the type of content in the document repository.



The Dashboard Tag Cloud

3.1.4.1 Adding Tags

This procedure adds new tags to the dashboard Tag Cloud.

Pre-requisite:

- The Tag Cloud plugin, installed and enabled, to ensure the Tag Cloud dashlet displays on the Dashboard

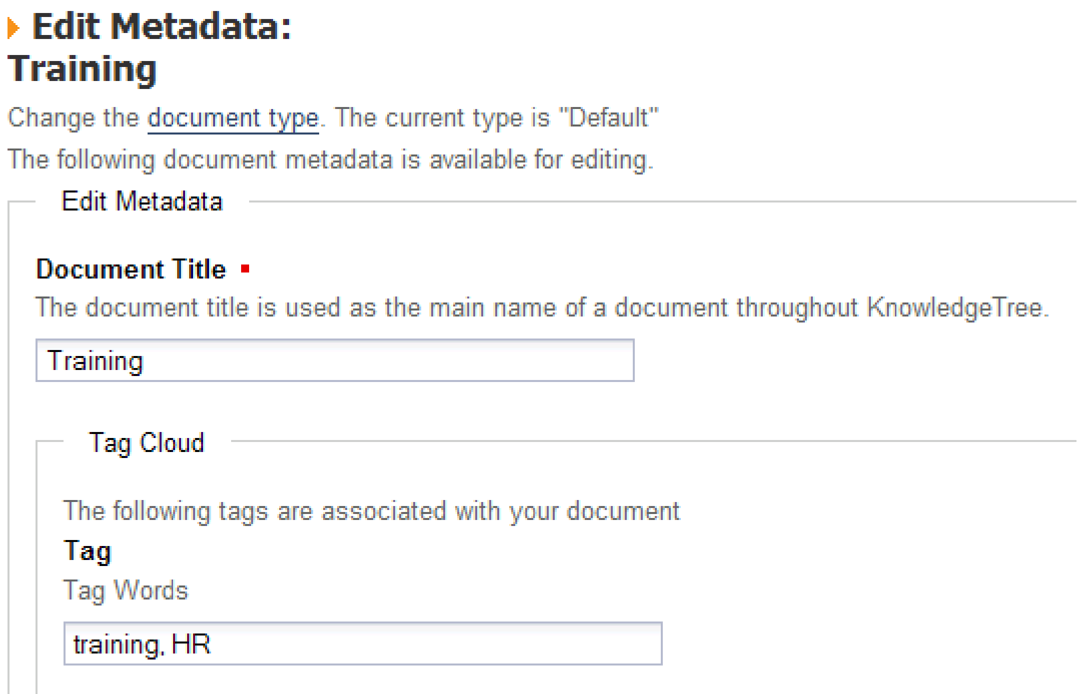
Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open Browse Documents.

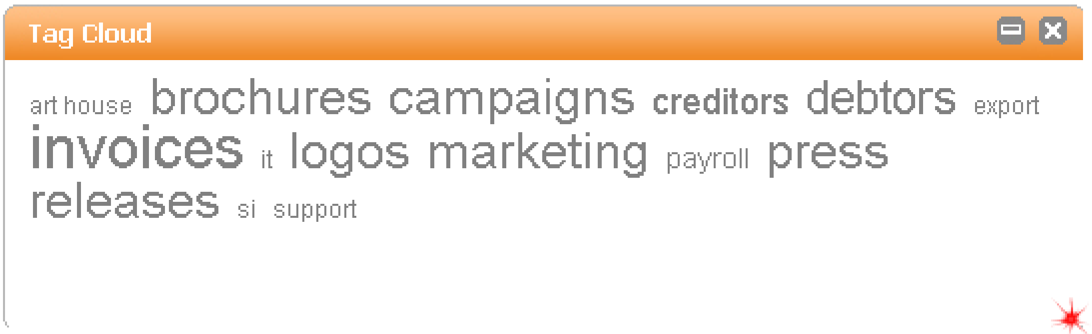
2. Locate the document where you want to add tags; then, open the document's Details page.

3. Click *Edit Metadata*. On the metadata editing screen, add relevant tags in the Tag Words field.

4. To verify that the tags you added display in the dashboard Tag Cloud, open the Dashboard. Test the tags by clicking on the tag word in the dashlet. All documents associated with the tag are returned in a permissions-restricted search results list.



Add tags



Tag Cloud on the dashboard

3.1.4.2 Using Tags

This procedures uses existing tags to find associated content in the repository.

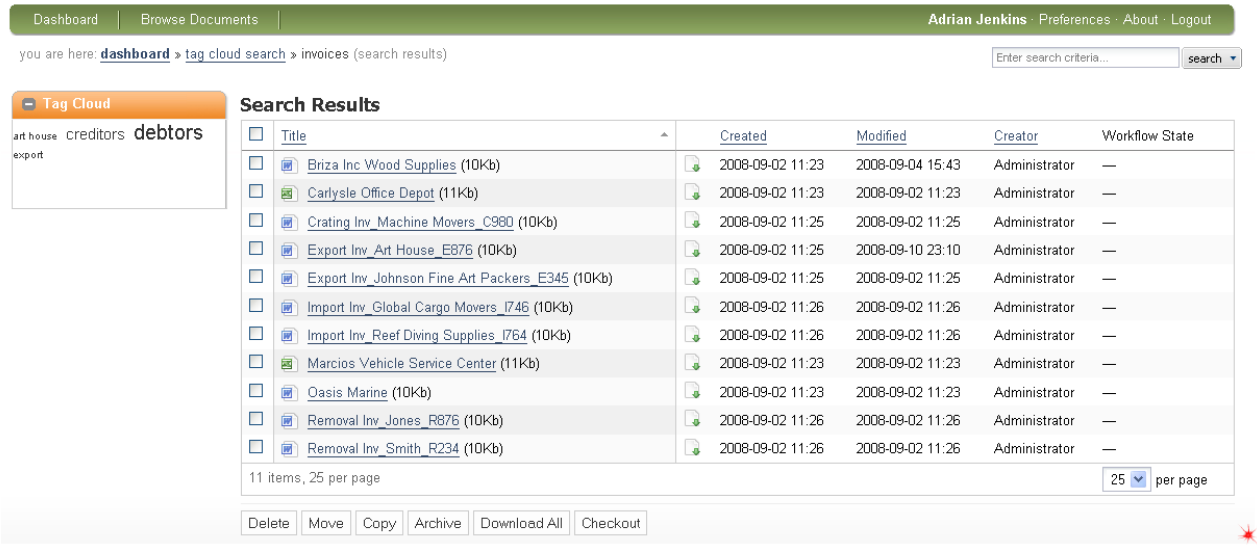
Perform the following steps:

1. Log in to KnowledgeTree's web interface dashboard.

2. Locate the Tag Cloud dashlet; then, click on a tag in the dashlet to view results for this tag.

3. The system returns a permissions-restricted list of all content associated with the selected tag.

Note: Tags return results based on documents that contain the tag in text content, and not in the document file name or title.



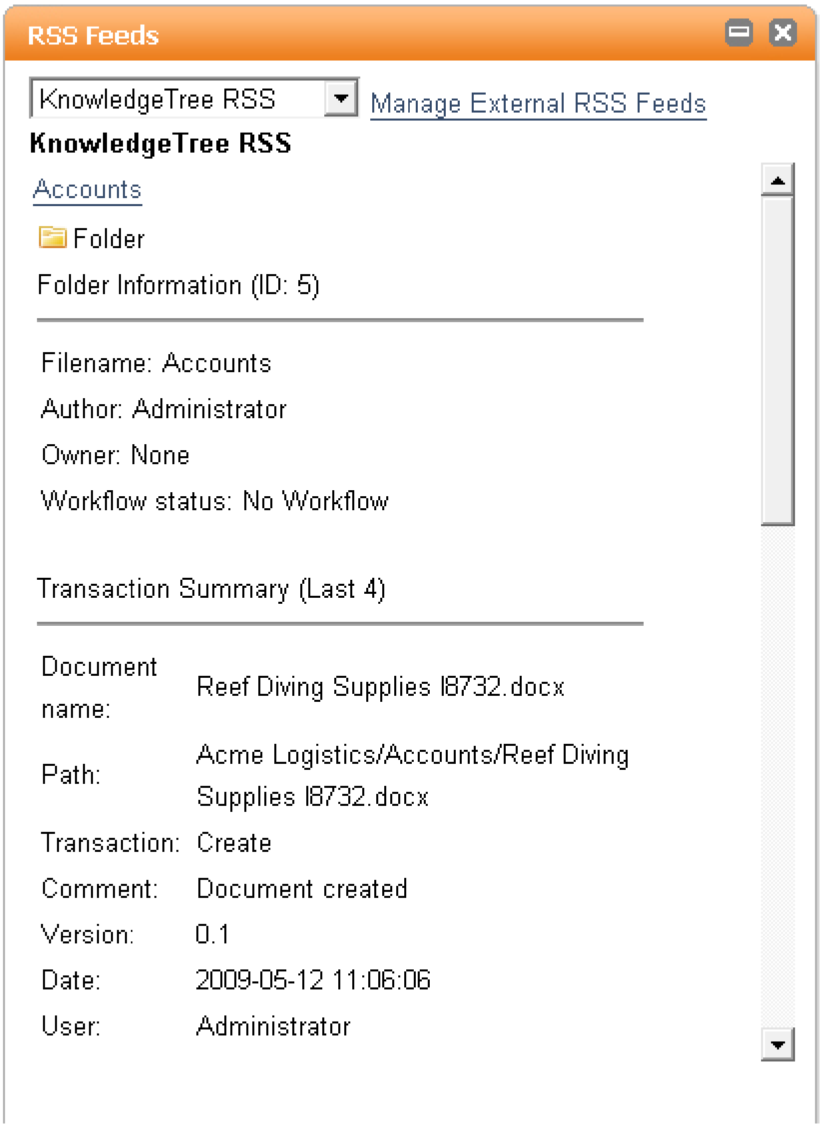
Tag search results

3.1.5 RSS Feeds

KnowledgeTree's RSS feeds feature allows you to set up subscribe to content on the Internet, and to content in the KnowledgeTree repository.

RSS Feeds Dashlet

The RSS Feeds dashlet on the KnowledgeTree Dashboard displays a list, in a drop down menu, of your RSS Feeds to external content - e.g. to websites, webpages, blogs, etc. outside of the repository. You may also subscribe to folders in KnowledgeTree so that when actions occur on these folders, these will display through the RSS dashlet.



RSS, and KnowledgeTree Security

KnowledgeTree RSS uses http authentication to protect content in the repository from unauthorized and/or anonymous access. You will therefore only be able to access external RSS Feeds on those documents and folders where you have at least view permissions defined in KnowledgeTree for your user profile, and specific to the content you're attempting to access through the RSS Feed. For this reason, you will need to enter your KnowledgeTree username and password when subscribing to a RSS Feed.

How can I set up RSS Feeds in KnowledgeTree?

There are three ways to use RSS Feeds in KnowledgeTree:

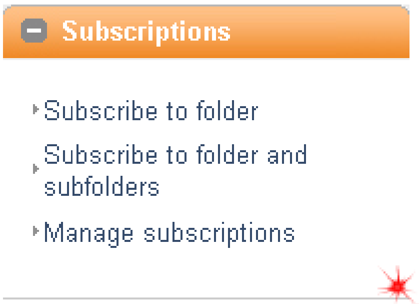
1. Add external RSS Feeds to subscribe to external content (news, blogs, etc.) from within KnowledgeTree.

2. Generate a RSS link (URL) on a KnowledgeTree document or folder to view RSS feeds on this content through an external feed reader.

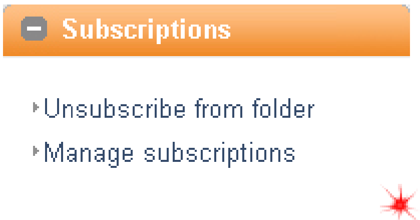
3. Subscribe to a KnowledgeTree document or folder to receive updates on this content through the RSS Feeds dashlet on the Dashboard.

Screenshots

- Subscribe to a folder to view the RSS feed on the folder through the RSS Feeds dashlet

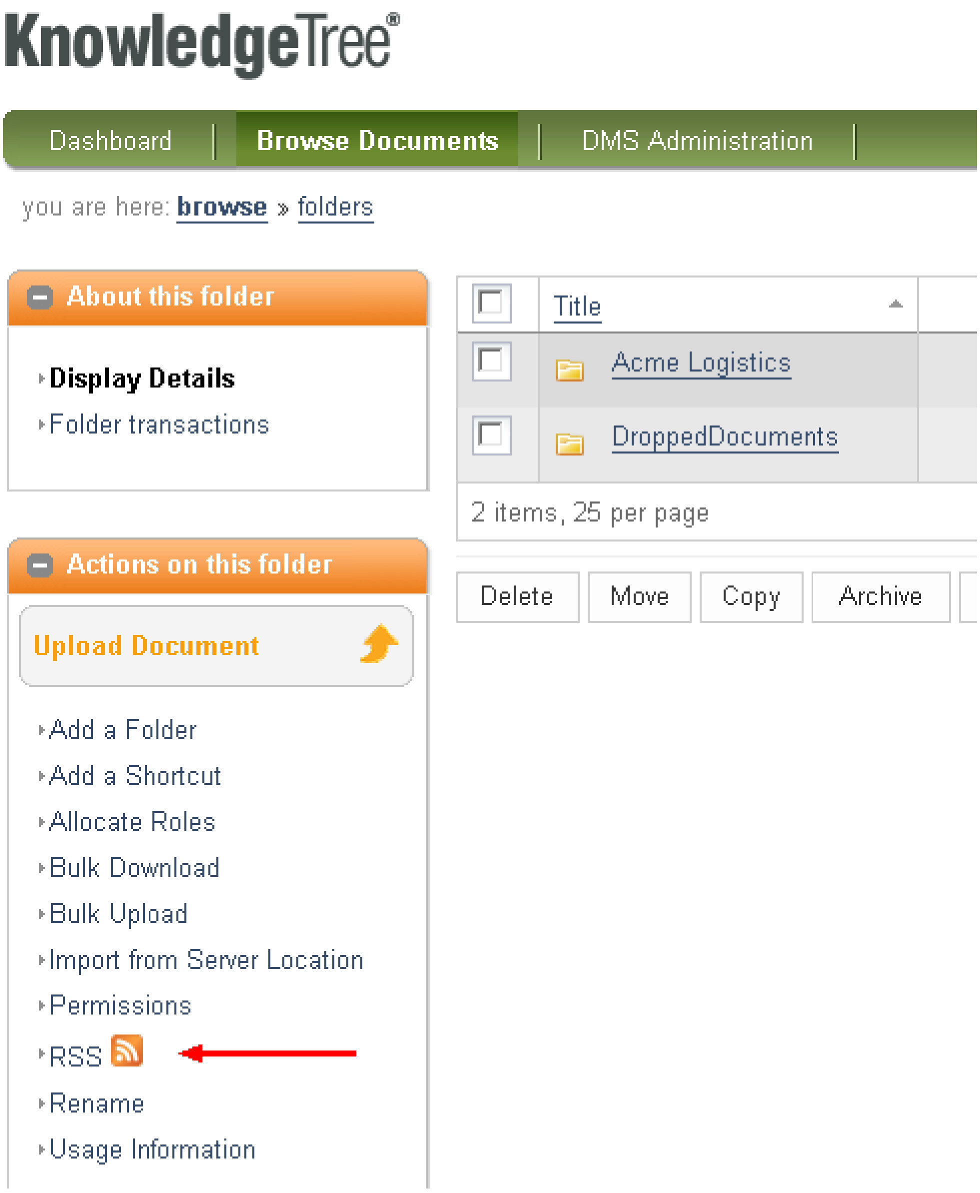


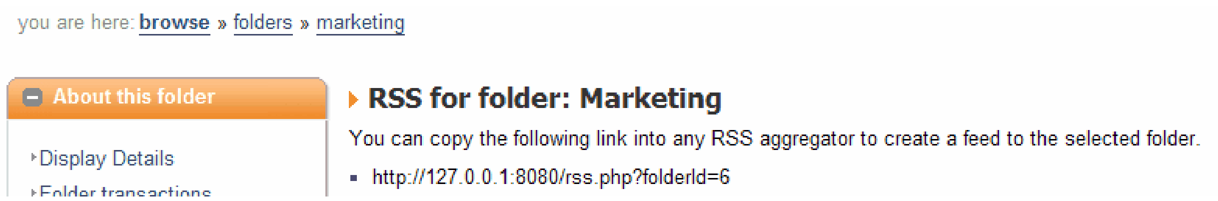
Subscriptions Menu



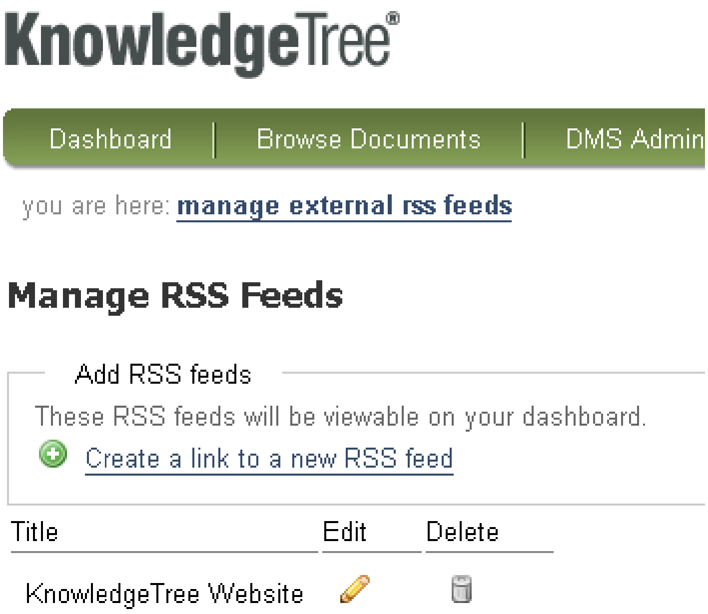
Subscriptions set up on a folder

- Set up RSS feeds on documents or folders in KnowledgeTree and monitor these feeds from outside KnowledgeTree





- Set up RSS feeds on external content (e.g. websites, blogs, etc), and view the feed through the RSS dashlet



3.1.5.1 Adding External RSS Feeds

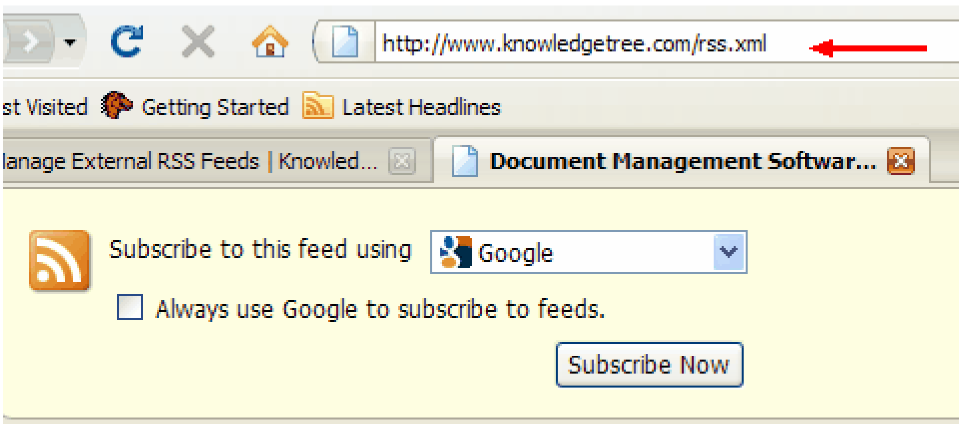
This procedure adds external RSS Feeds to KnowledgeTree.

Note: External RSS feeds are feeds from external websites, blogs, etc., which you can view through the RSS Feeds dashlet on the KnowledgeTree Dashboard.

Perform the following steps:

1. Subscribe to the RSS feeds on the external website, blog, or other online content; then, copy the RSS link to this feed.

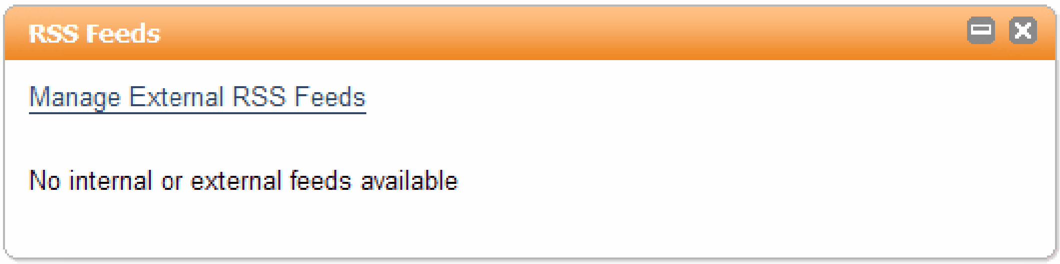
Step 1.1: Click RSS icon



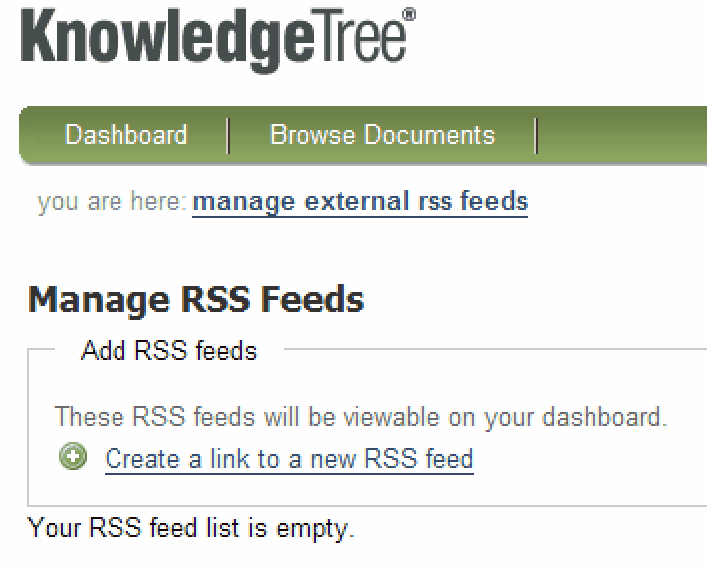
Step 1.2: Copy the link

2. Log in to KnowledgeTree's Web interface to open the KnowledgeTree Dashboard; then,

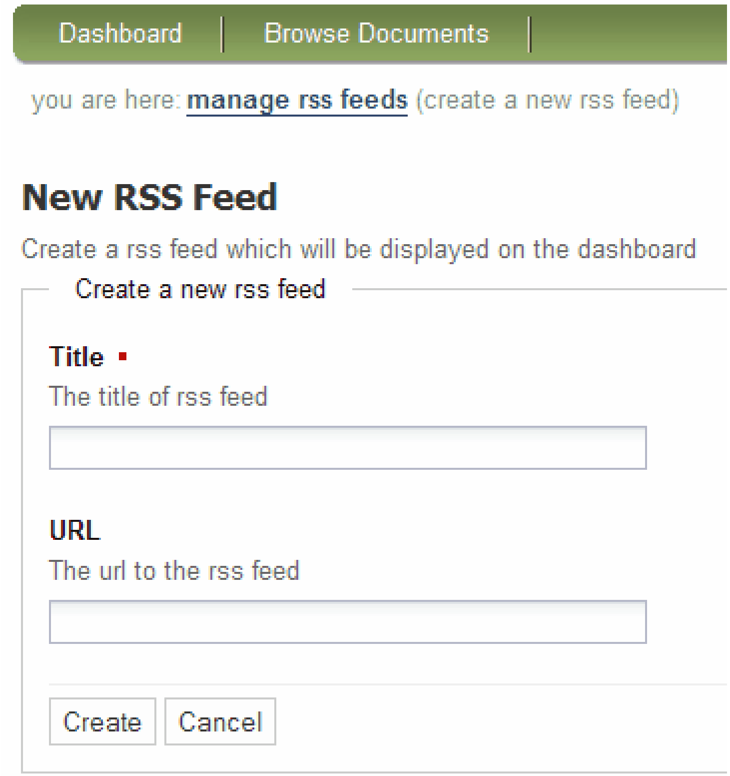
locate the RSS Feeds dashlet.



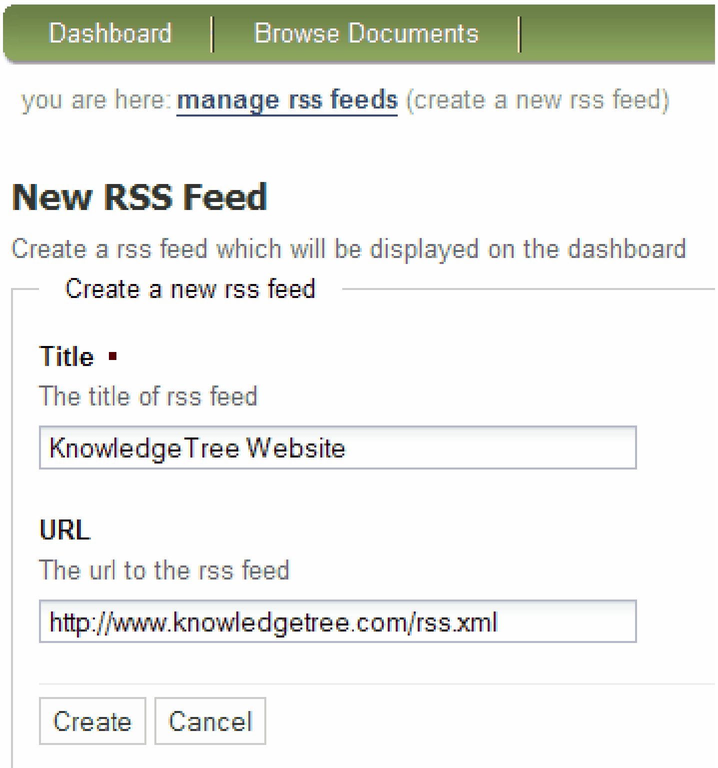
3. Click *Manage External RSS Feeds* to open the Manage RSS Feeds page.



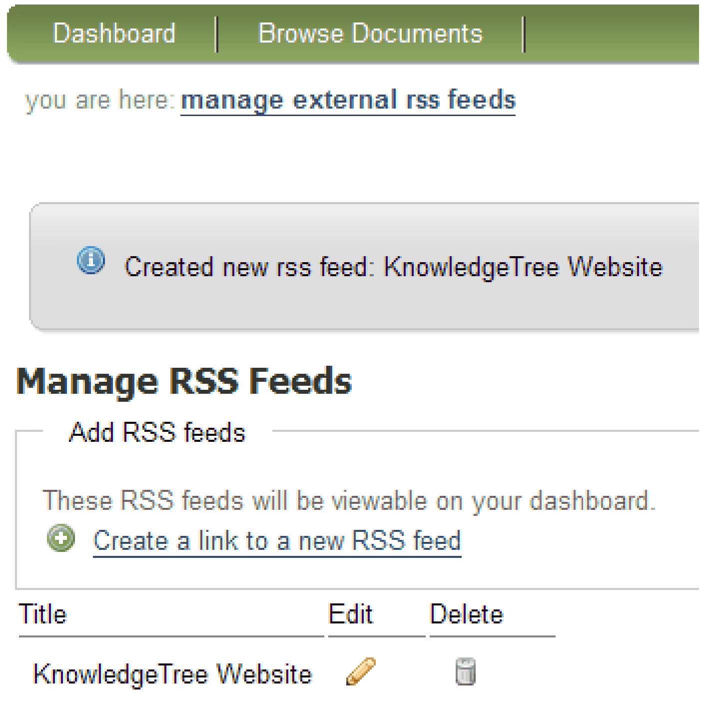
4. Click *Create a link to a new RSS feed* to open the New RSS Feed page.



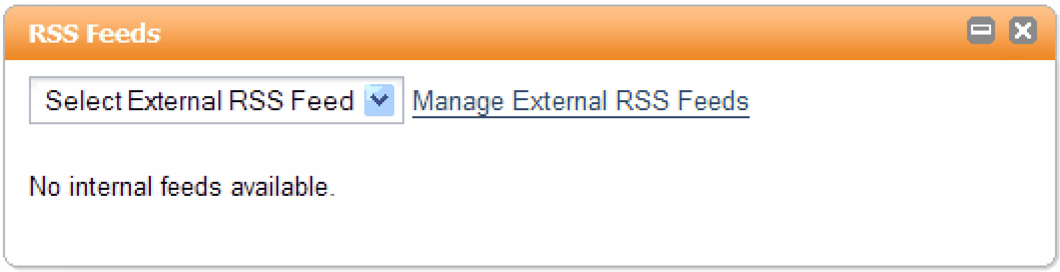
5. Define a name for the feed in the Title field; then, paste the link you copied, to the URL field. When you're done, click *Create*.



6. The external RSS Feed you set up is added to the page, where you can view, edit, and delete any external RSS Feeds you set up.



7. To view the RSS Feed you set up, re-open the Dashboard. A list of all your external RSS Feeds display in the Select External RSS Feed pick list, where you can select a RSS feed to view it.



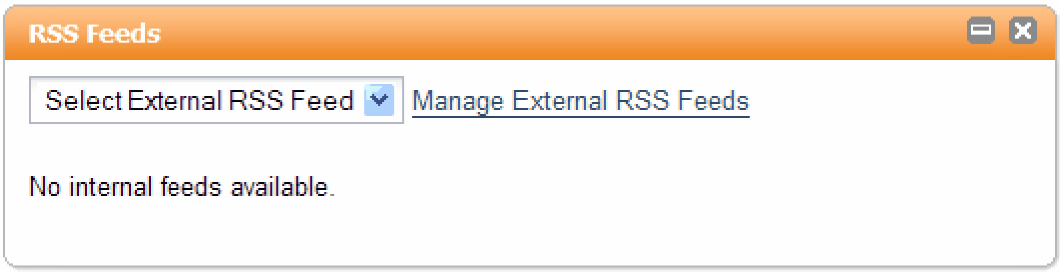
3.1.5.2 Viewing / Editing / Deleting Existing External RSS Feeds

This procedure displays, edits, and deletes existing external RSS Feeds.

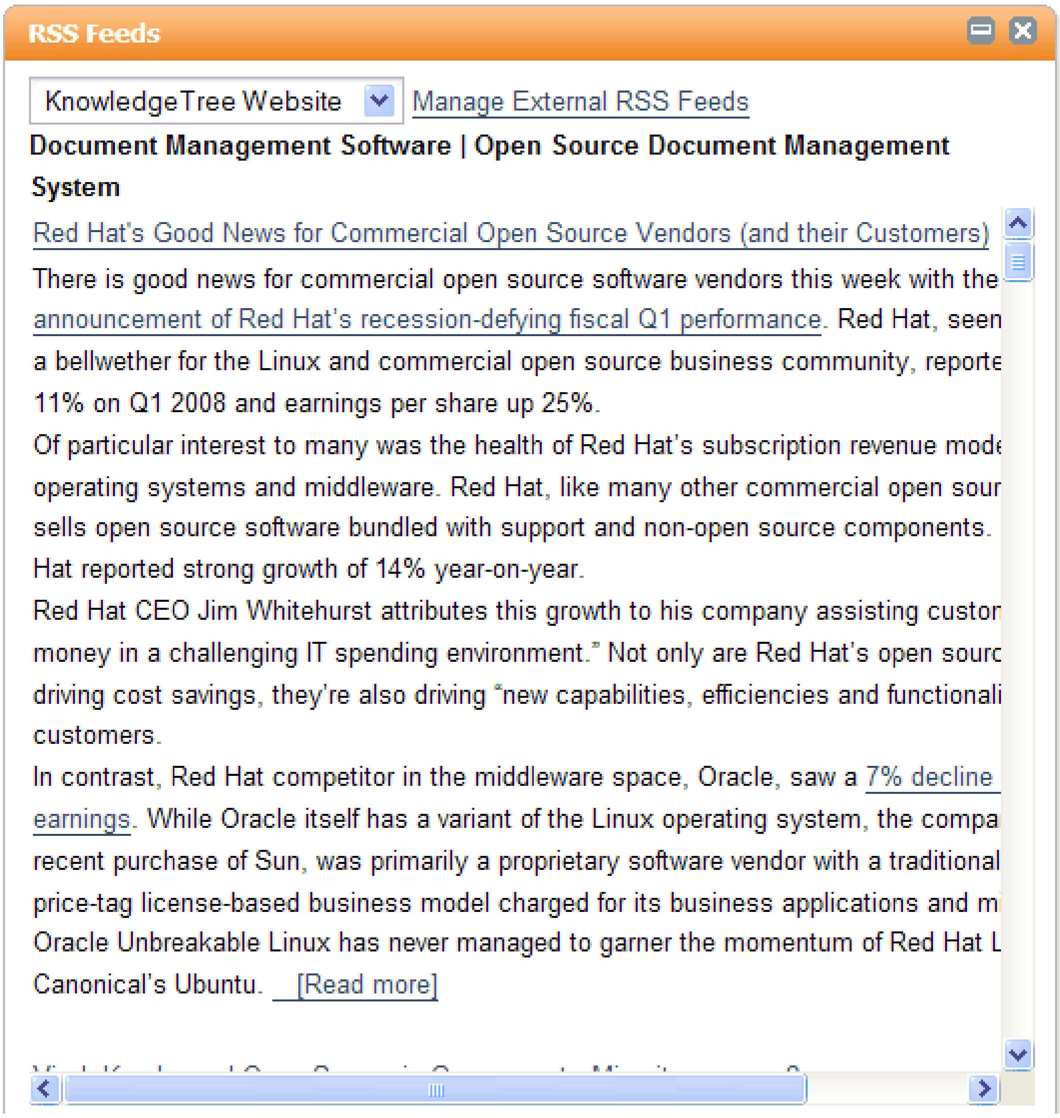
Note: External RSS feeds are feeds from external websites, blogs, etc., which you can view through the RSS Feeds dashlet on the KnowledgeTree Dashboard.

Perform the following steps:

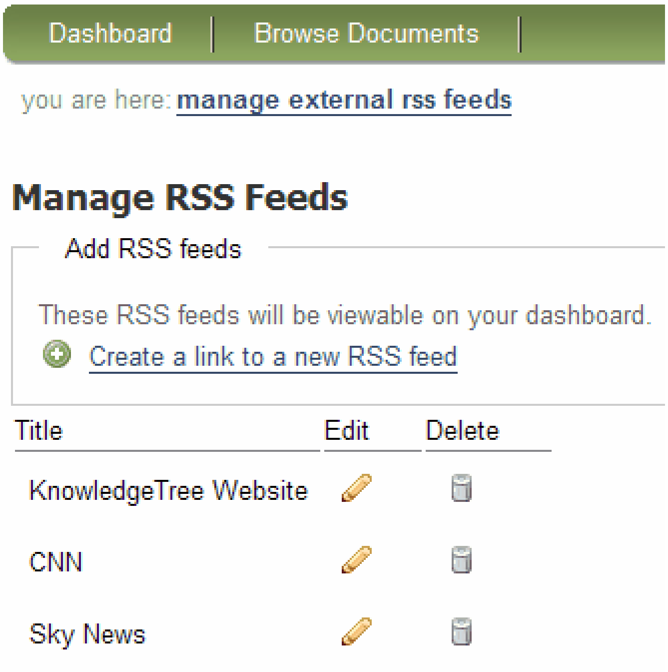
1. Log in to KnowledgeTree's Web interface to open the KnowledgeTree Dashboard; then, locate the RSS Feeds dashlet.



2. Do you want to ...
   - view an existing external RSS Feed? Go to step 3.
   - edit or delete an existing external RSS Feed? Go to step 4.
3. Click the down arrow at the Select External RSS Feed pick list; then, select a RSS feed to load it in the dashlet.



4. Click *Manage External RSS Feeds* to open the Manage RSS Feeds page.



5. Do you want to ...
   - view your existing external RSS Feeds? A list of existing external RSS feeds displays on the page.

   - edit an existing external RSS Feed. In the list of existing feeds, locate the feed you want to edit; then, click the Edit icon for the relevant feed to open the Edit RSS Feed page. View and/or change the RSS Feed title and/or the URL; then, when you're done, click Save changes.

   - delete an existing external RSS Feed? In the list of existing feeds, locate the feed you want to delete; then, click the Delete icon for the relevant feed. The feed is deleted.

   - create a new external RSS Feed? Go to Adding External RSS Feeds to view the instructions for this task.

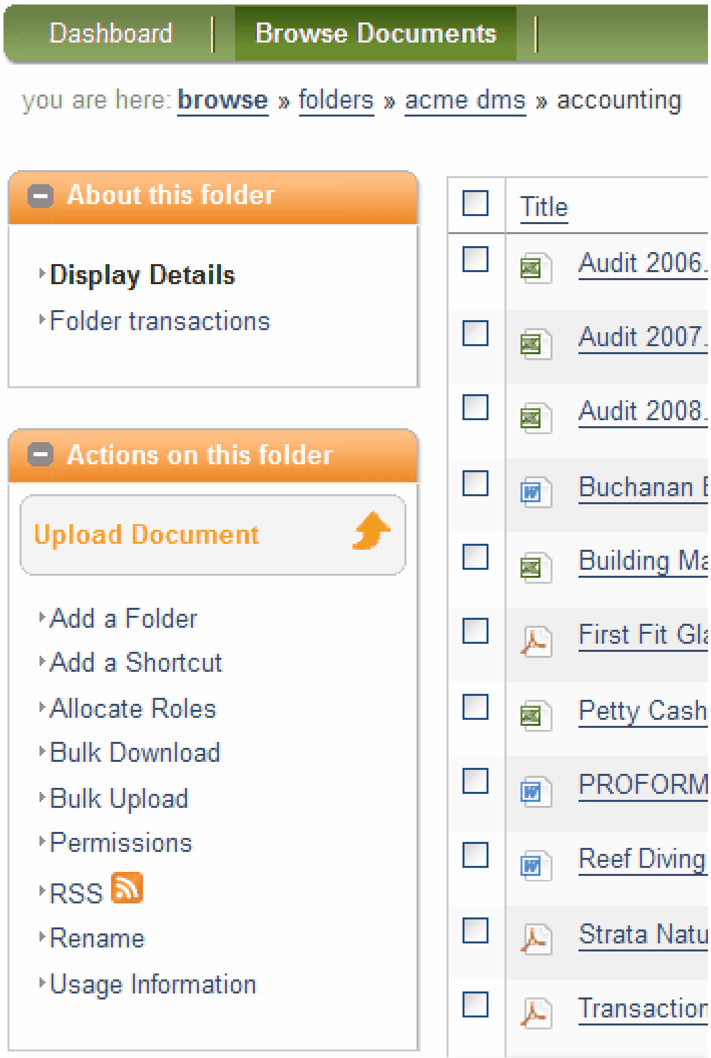
3.1.5.3 Generating an RSS link to View RSS Feeds on KnowledgeTree Content Externally

This procedure generates a RSS feed link (URL) on a KnowledgeTree folder or document for which you want to subscribe to RSS feeds through an external feed reader.

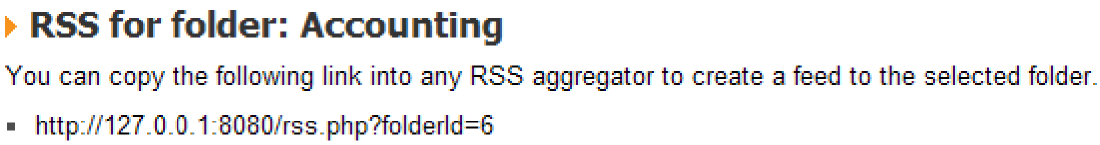
Perform the following steps:

1. Log in to KnowledgeTree's Web interface; then, search for or browse to the folder where you want to set up the RSS feed.

2. Click the RSS icon on the Folder Actions / Document Actions menu (as applicable).



3. KnowledgeTree generates the folder/document RSS link (URL).



4. Copy the system generated link (URL) into your RSS aggregator (feed reader) to create the feed. You will be notified of any changes on the document or folder through your external RSS Feeds reader.

Note: Ensure that your RSS reader is RSS 2.0 compatible.

Note: KnowledgeTree RSS uses http authentication to protect content in the repository from unauthorized and/or anonymous access. You will therefore only be able to access external RSS Feeds on those documents and folders where you have at least view permissions defined in KnowledgeTree for your user profile, and specific to the content you're attempting to access through the RSS Feed. For this reason, you will need to enter your KnowledgeTree username and password when subscribing to a RSS Feed.

3.1.5.4 Viewing / Deleting / Adding Subscriptions

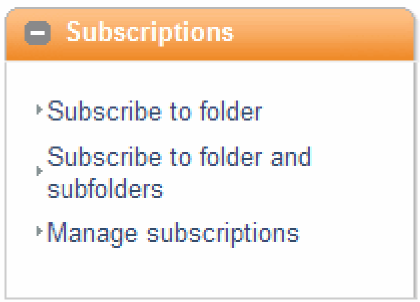
This procedure displays and removes existing subscriptions, and adds new subscriptions to KnowledgeTree documents and folders.

⊟ What are Subscriptions?
Subscribing to a document or folder allows notifications to be sent to you via email (if you have this feature activated on your system) when the document or folder is checked in/ checked out, deleted, moved, archived, etc.

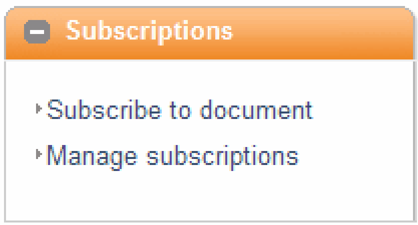
User-specific notifications display on the Dashboard as internal RSS Feeds. Remove a subscription (unsubscribe from the document or folder) to stop receiving notifications.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, click *Browse Documents* to enter the folder structure. The Subscriptions menu displays at the bottom left of the page in Browse Documents.



Folder Subscriptions Menu

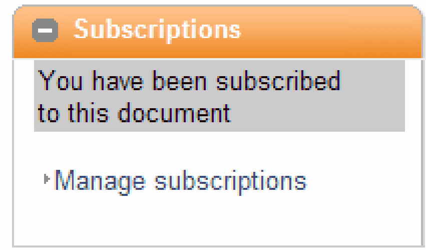


Document Subscriptions Menu

2. Do you want to ...

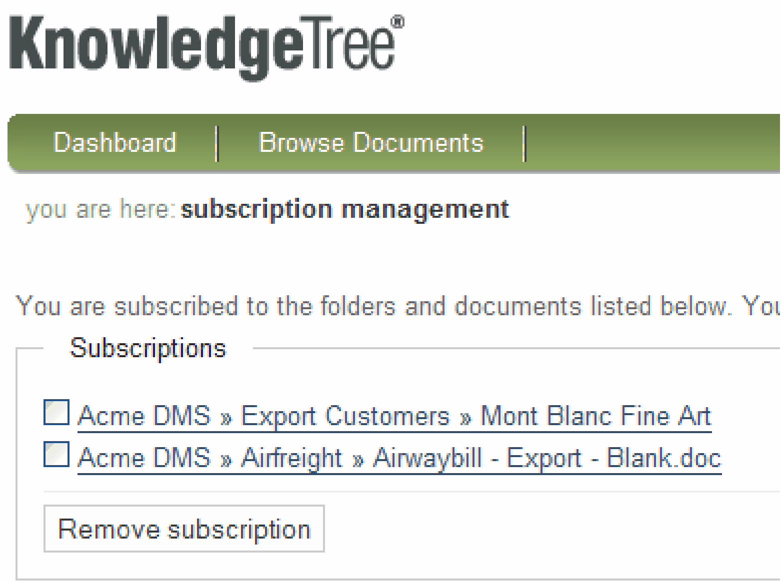
- view subscriptions currently set up for your user profile? Click *Manage subscriptions* to open the Subscription Management page. The page displays a list of all the documents / folders on which you currently have subscriptions set up - the full path to the folder or document is displayed. You may select the check box adjacent to any folder or document subscription you want to remove; then, click *Remove subscription*.

- subscribe to a document? On the Document Details page for the relevant document, on the Subscriptions menu, click Subscribe to document. The subscription is confirmed.



- subscribe to a folder, or to a folder and its subfolders? Open the folder; then, on the Subscriptions menu click *Subscribe to folder*, or, click *Subscribe to folder and subfolders* (as applicable). The subscription is confirmed.

- delete an existing document subscription or a folder subscription? On the Subscriptions menu, click *Manage subscriptions* to open the Subscription Management page. Select the subscription/s you want to delete; then, click *Remove subscription*.



3.2 Browse Documents

Browse Documents provides access to the folder structure, where you can work with documents and folders in the Web interface of the repository, and browse repository content.

Browse Views

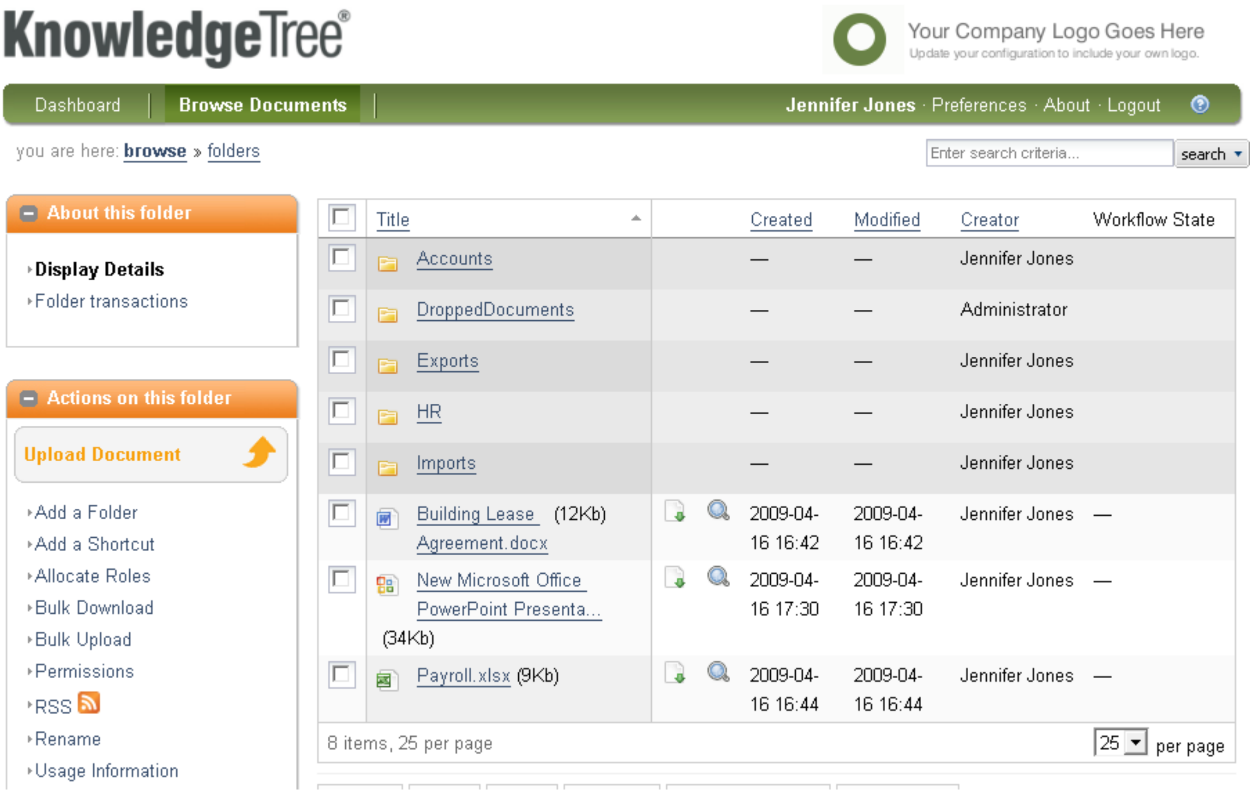
You can choose to browse KnowledgeTree by ...

- Folder - this is the default view, where the right pane of the Browse Documents page displays the folder structure. Click on a folder to view its content, or to drill down further into the KnowledgeTree folder structure.

- Document Type - this view allows you to select a document type, to view only documents of a selected type.
- Lookup Value - this view allows you to select a lookup field and associated value, and view only those documents that have this lookup field and value.
- Tag - allows you to view KnowledgeTree content based on the tags users have added to your system.

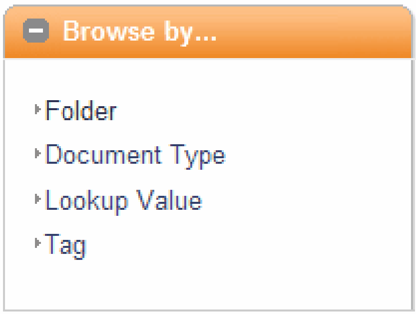
See Configuring the Browse View for more information on changing the Browse View.

IMPORTANT - ELECTRONIC SIGNATURES!
When KnowledgeTree's electronic signatures functionality is enabled for your system, you will need to re-authenticate (enter your KnowledgeTree username and password) when performing most actions on documents and folders through KnowledgeTree's web interface, typically in Browse Documents.



3.2.1 Configuring the Browse View

This procedure allows you to select a 'browse by ... ' mode for navigating and finding content in the repository. The browse by views allow you to filter content in the repository by folder, by document type, or by lookup value – the default is the folder view.



Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, click Browse Documents to enter the folder structure.
   Note: By default, the browse view opens in Folder view.

2. Do you want to view KnowledgeTree content by ...

- folder? This is the default view. Click on a folder to open it, and start browsing repository content by navigating through the folder structure.

- document type? Scroll to the bottom of the page to the Browse by ... menu. Click the plus icon to expand the menu; then, click *Document Type*. Select a document type from the list to open a list of the documents in the repository that match this criteria.

- lookup value? Scroll to the bottom of the page to the Browse by ... menu. Click the plus icon to expand the menu; then, click *Lookup Value*. Select a lookup field from the list; then, select an associated lookup value. The system returns all documents in the repository that matches the lookup field and associated lookup value defined by you.

- tag? Scroll to the bottom of the page to the Browse by ... menu. Click the plus icon to expand the menu; then, click *Tag*.

3.2.2 Working with Folders

You use the About this folder and the Actions on this folder menus in the Folder View of Browse Documents to work with folders.

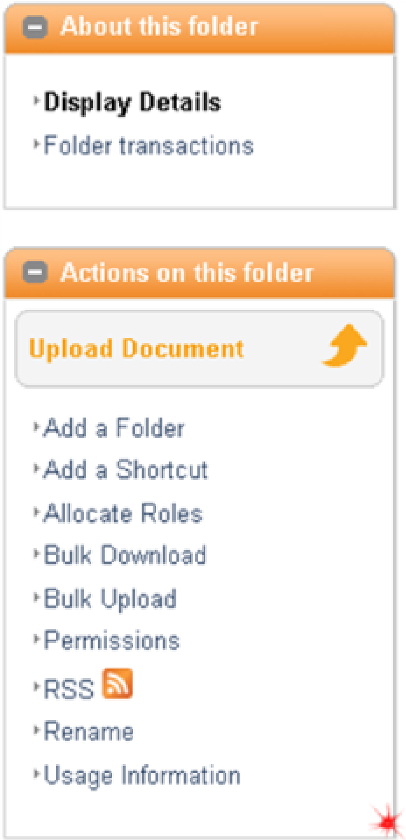
Note: Only those actions for which the currently logged in user has permissions on the current folder display in the menu.

IMPORTANT - ELECTRONIC SIGNATURES!
When KnowledgeTree's electronic signatures functionality is enabled for your system, you will need to re-authenticate (enter your KnowledgeTree username and password) when performing most actions on documents and folders.

About this folder

- Display Details - the default view of the folder, shows folder content and details
  Note: This option displays only if you have permissions for the action.

- Folder Transactions - displays a transaction history for the currently selected folder



Actions on this folder

- Upload Document - adds a single document to KnowledgeTree from your local computer or network

- Add a Folder - creates a new KnowledgeTree folder
  Note: This option displays only if you have permissions for the action.

- Add a Shortcut - adds a shortcut to a selected folder, from within the current folder
  Note: This functionality is only available in KnowledgeTree Commercial Editions.

- Allocate Roles - define the roles who should have permissions on the folder
  Note: This option displays only if you have permissions for the action.

- Bulk Download - exports a collection of your KnowledgeTree documents and folders in a zipped file to a destination location you specify
  Note: This option displays only if you have permissions for the action.

- Bulk Upload - uploads a zipped file (that may contain a number of files and folders) from your local computer

- Permissions - displays the groups and roles who have permissions on the folder
  Note: This option displays only if you have permissions for the action.

- RSS - generates a RSS link (URL) for the current folder

- Rename - allows you to change the

name of the folder
Note: This option displays only if you have permissions for the action.

- Usage Information - displays reports, by user, general activity on the folder, or by workflow and document type
  Note: This functionality is only available in KnowledgeTree Commercial Editions.

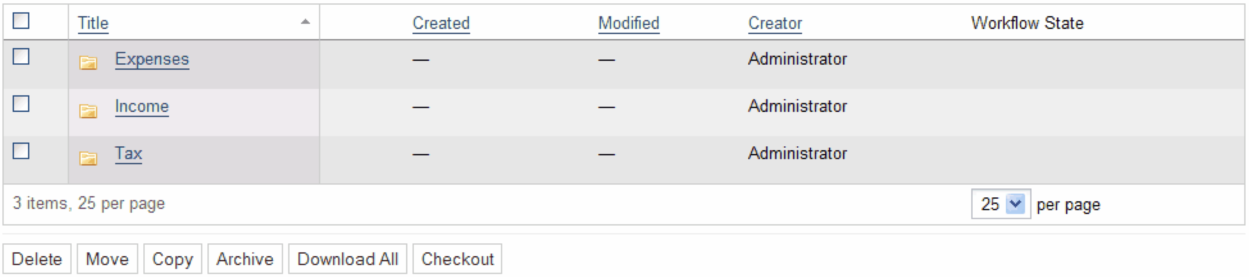
3.2.2.1 Viewing Folder Details and Folder Content

This procedure displays the content in a currently selected folder, including information about folder contents.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, click *Browse Documents* to enter the folder structure.

2. By default, when opening Browse Documents, the repository content opens in folder view, starting with the root folder, and Display Details is the default view.



3. To drill down further into the folder structure, click on a folder to view it's contents; then, drill down further as required until you reach the folder you require - alternatively, use Search to locate the folder.

4. Having located the folder, the system presents the default Display Details view in the About the folder menu (on the top left of the page in Browse Documents), which provides a list of the folder contents, and includes the following details:

Column	Description
Check boxes	Select check boxes adjacent to the relevant folders - one or more (or select the top check box to select all items); then, click on a button at the bottom of the page to perform the relevant action on one or more selected folders in the table. Available actions are: Delete, Move, Copy, Archive, Export, Checkout.
Title	Click on the Title header to sort folders alphabetically, by their title.
Created	The date this folder was added to the repository. Click on the 'Created' header to sort items by 'created' date.

Modified	The date the item was last modified. Click on the Modified header to sort items by the last modified date.
Creator	The username of the person who added the item to the repository. Click on the Creator header to sort items by 'creator'.
Workflow state	The current workflow state of the folder or document in the table. Click on the Workflow State header to sort content by 'Workflow State'.

3.2.2.2 Viewing Folder Transaction History

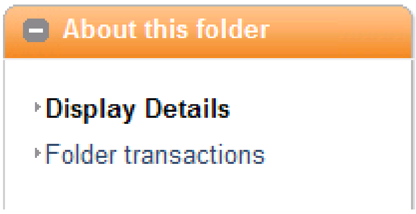
This procedure displays a folder transaction history for the folder at your current location in the web interface of the repository.

Perform the following steps:

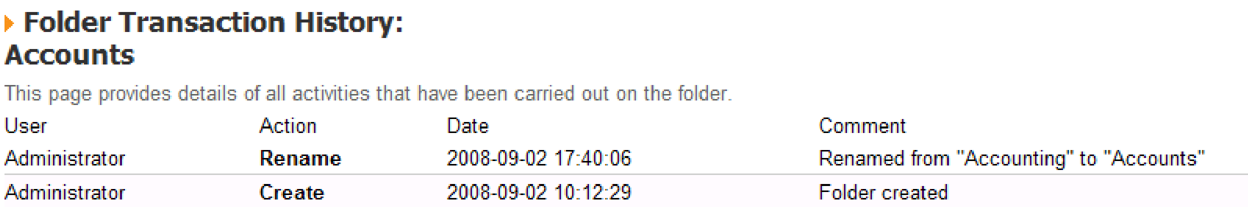
1. Log in to KnowledgeTree's web interface; then, click *Browse Documents* to enter the folder structure.

2. Navigate to the folder for which you want to generate the transaction history.

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



4. View the folder transaction history on the page. Details include: username, action taken, date, comment.



3.2.2.3 Adding Documents to KnowledgeTree Folders

This procedure adds a new document to the currently selected folder in KnowledgeTree's web interface.

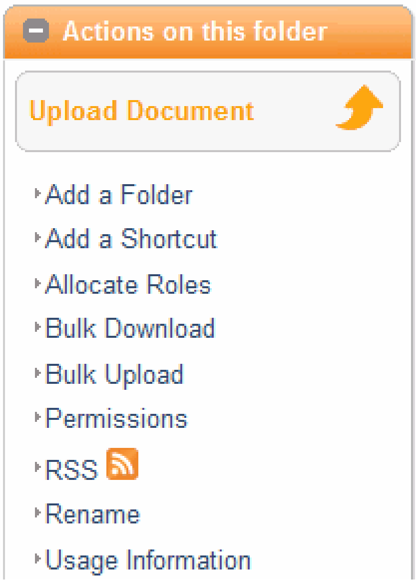
Note: This procedure adds a document from your local file system. See Creating Documents Online for instructions on using Zoho Writer and Sheet in KnowledgeTreeLive.

Perform the following steps:

1. Login to KnowledgeTree's web interface.

2. Locate the folder where you want to upload the document - search, or navigate the repository through Browse Documents to locate the folder.

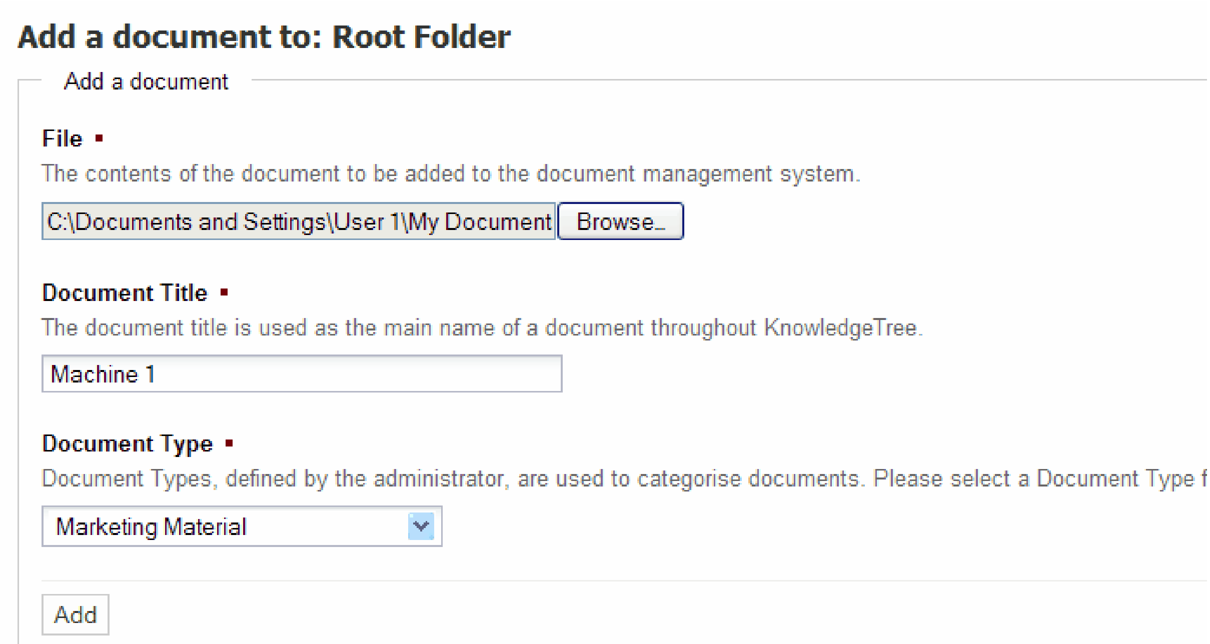
3. In the Actions on this folder menu click *Upload Document*.



4. On the Add a document to .. page, in the File field, specify the path the document you're uploading, or click *Browse* to navigate to the document on your local environment.

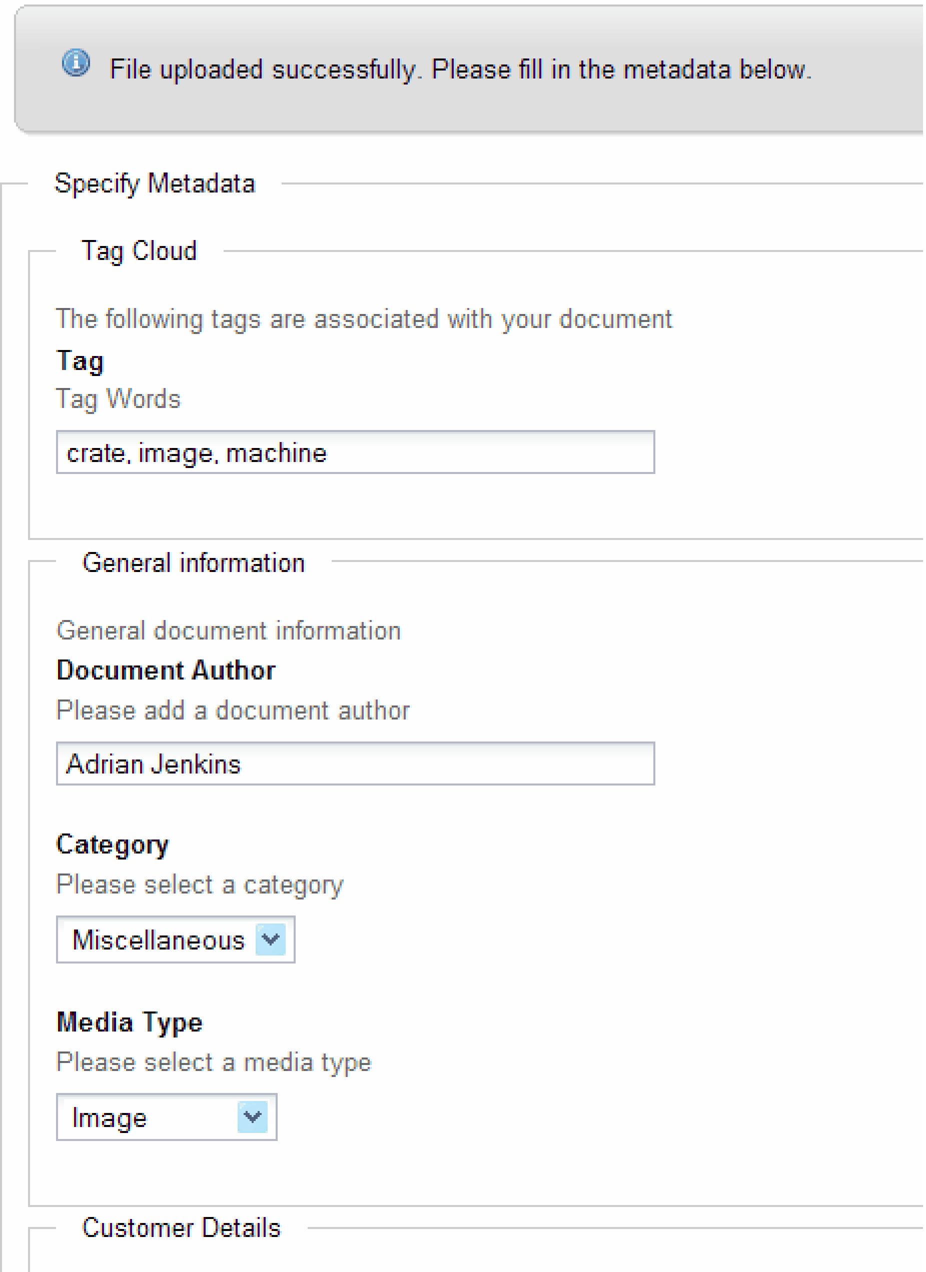
5. Accept the auto-populated Document Title or define a title; then, select a document type.

6. When you're done, click *Add* to upload the document.

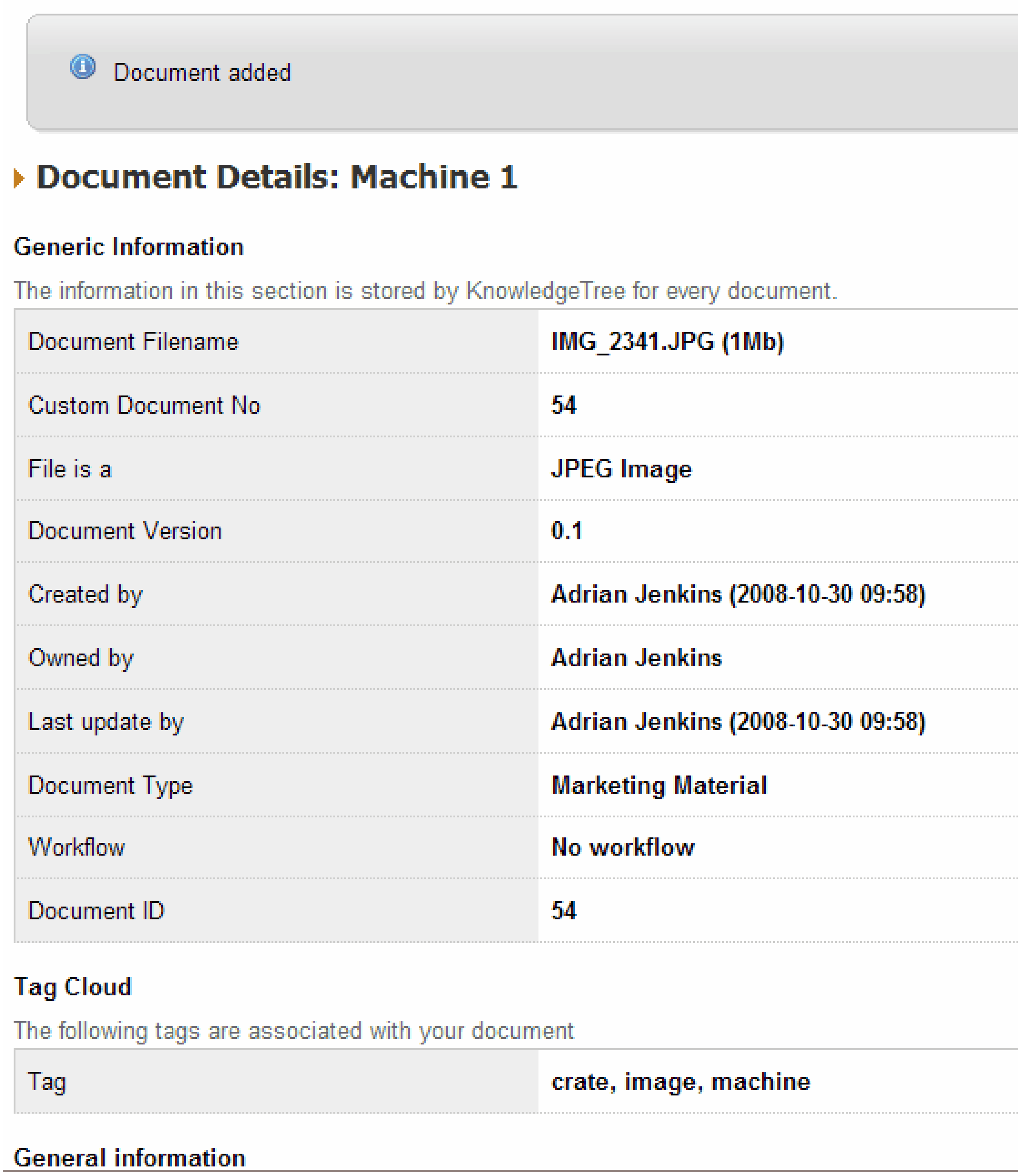


7. A system message informs you that the file has uploaded successfully; now, fill out the document metadata.

Note: The system administrator predefines the metadata fields per document type.



8. When you're done, click *Save Document*.
   Note: The Document Details page opens, where you can view the data you entered for this document.



Document added

Document Details: Machine 1

Generic Information

The information in this section is stored by KnowledgeTree for every document.

Document Filename	IMG_2341.JPG (1Mb)
Custom Document No	54
File is a	JPEG Image
Document Version	0.1
Created by	Adrian Jenkins (2008-10-30 09:58)
Owned by	Adrian Jenkins
Last update by	Adrian Jenkins (2008-10-30 09:58)
Document Type	Marketing Material
Workflow	No workflow
Document ID	54

Tag Cloud

The following tags are associated with your document

Tag	crate, image, machine

General information

3.2.2.4 Adding Folders

This procedure adds a new folder to KnowledgeTree.

Pre-requisite:

- Only users with the 'Add Folder' permission on a parent folder may add folders to the that parent folder in the repository.

Perform the following steps:

1. Login to KnowledgeTree's web interface.

2. Locate the relevant folder where you wish to add a new folder - search, or enter Browse Documents to browse the folder structure to the relevant folder.

3. In the Actions on this folder menu click *Add a Folder*.

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

3.2.2.5 Adding Shortcuts (Symbolic Links)

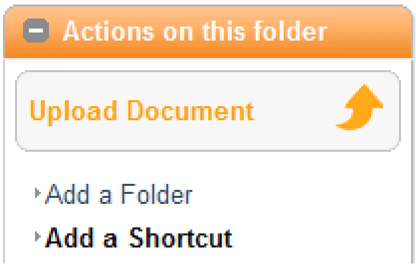
This procedure adds a shortcut (symbolic link) in a selected folder, to another document or folder.

Note: This feature is only available in KnowledgeTree Commercial (on-premise, or KnowledgeTreeLive).

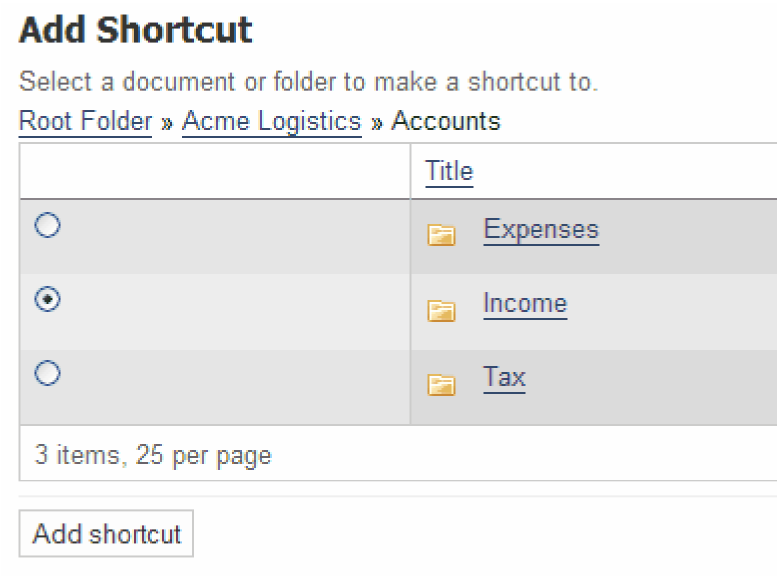
Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the folder where you want to add a shortcut - search for the folder, or navigate to the folder through the folder structure in Browse Documents.

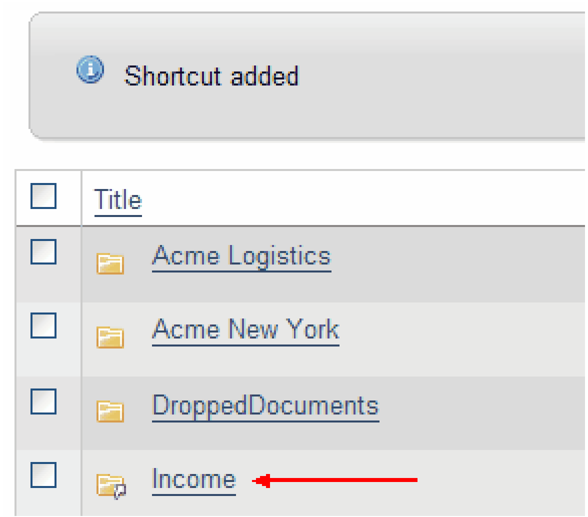
2. On the Actions on this folder menu, click *Add a Shortcut*.



3. Navigate to the target folder or document; then, select the folder or document for which you are adding this shortcut. Click *Add Shortcut*.



4. The name of the document or folder to which you created a shortcut displays in the list of contents in the folder. Clicking on the document or folder opens the Document Details page (for a document) or the folder contents (for a folder).



3.2.2.6 Bulk Downloading Folders

This feature allows you to download the entire contents of a folder stored in the repository to a zipped file, which you can save to your computer for local viewing.

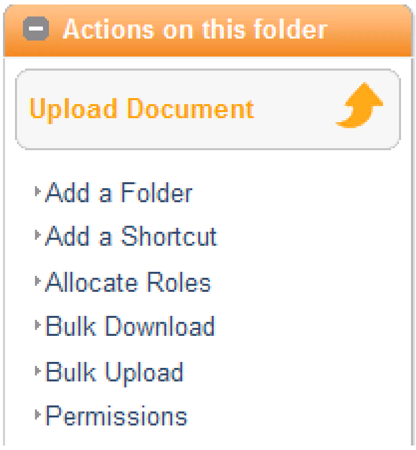
Pre-requisite:
You must have appropriate permissions on the folder for this action to display as an allowable action in the Actions on this folder menu.

Perform the following steps:

1. Login to KnowledgeTree's web interface; then, click *Browse Documents* to enter the folder structure.

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

3. Click *Bulk Download* in the Actions on this folder menu.



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

3.2.2.7 Bulk Uploading

This procedure uploads multiple documents in a zipped folder, from your local computer to the KnowledgeTree repository.

Pre-requisites:

- Files should be placed in a zipped archive at the source location prior to attempting bulk upload in KnowledgeTree. Bulk uploaded files retain the directory structure defined in the zip archive.
- Ensure that you use a supported compression format for bulk uploads to KnowledgeTree: 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)

Notes:

- *Bulk Upload may not be available for your installation. Consult your administrator if you require access to this functionality.*

Performing a Bulk Upload of content:

1. Login to KnowledgeTree's web interface; then, click *Browse Documents* to enter the folder structure.

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

3. In the Actions on this folder menu, click *Bulk Upload*.

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

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

6. Complete the information fields for this document type.

Note: The KnowledgeTree administrator defines the fieldsets that display once you have selected the document type.

7. When you're done, click Upload.

3.2.2.8 Creating documents online

This procedure creates a new document online through Zoho(R) Writer and Sheet.

Note: This feature is only available for KnowledgeTreeLive, and is provided through the Zoho plugin in KnowledgeTreeLive (enabled by default). Zoho integration for KnowledgeTreeLive supports the following file types: DOC, XLS.

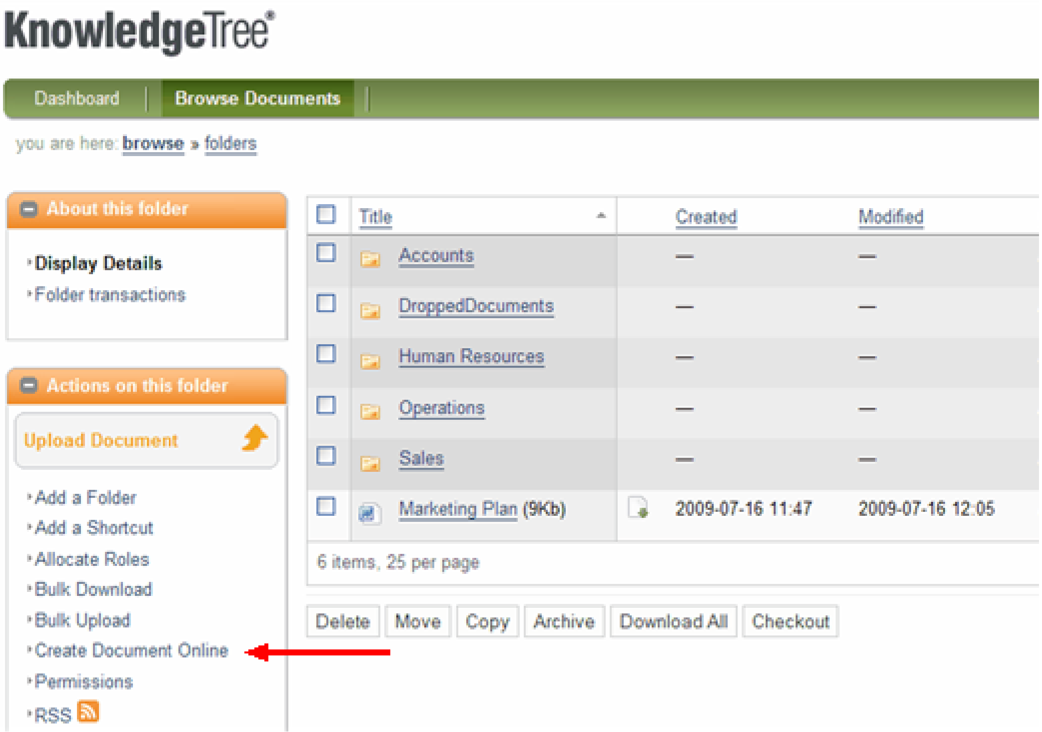
[Watch the Zoho Integration webcast](#).

Perform the following steps:

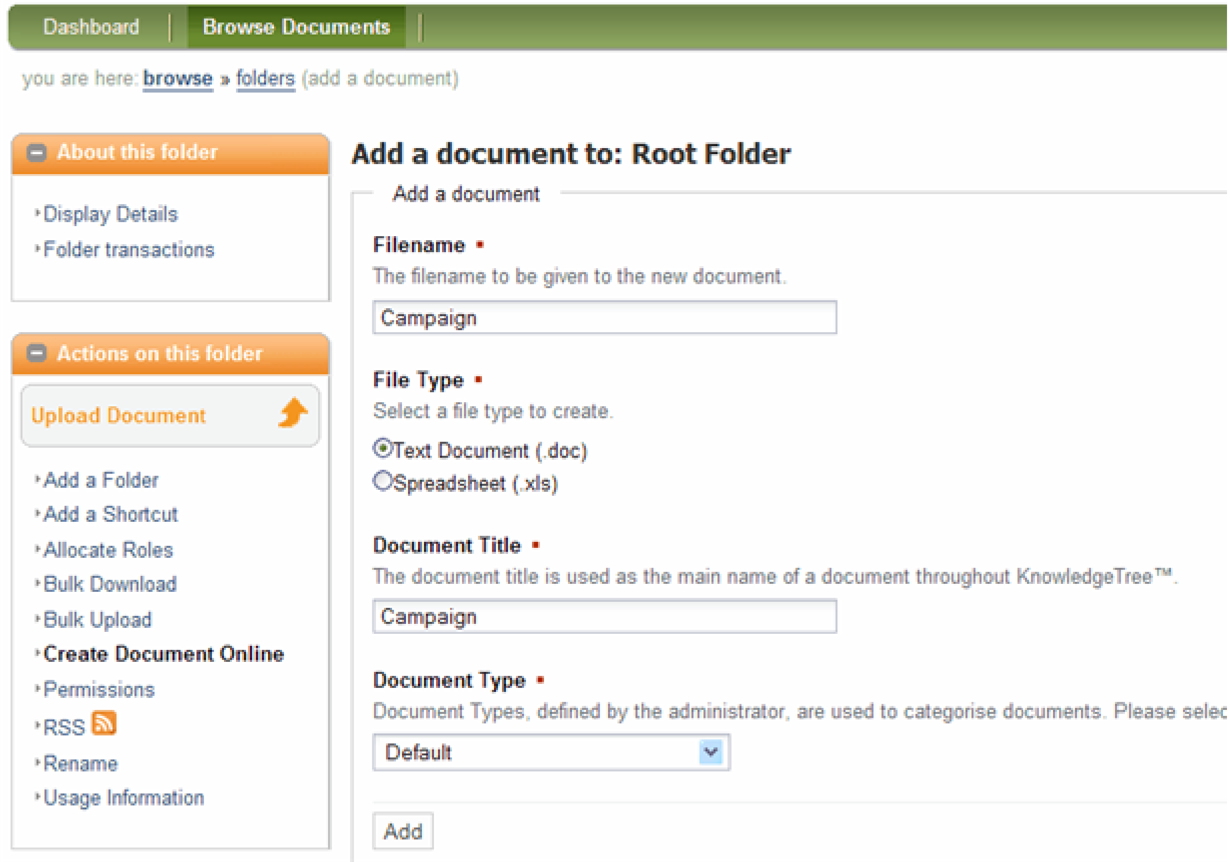
1. Use your KnowledgeTreeLive account credentials - URL, username, and password - to log on to KnowledgeTree.

2. Locate the folder where you want to create a new document online - navigate to the folder through Browse Documents, or search for the folder.

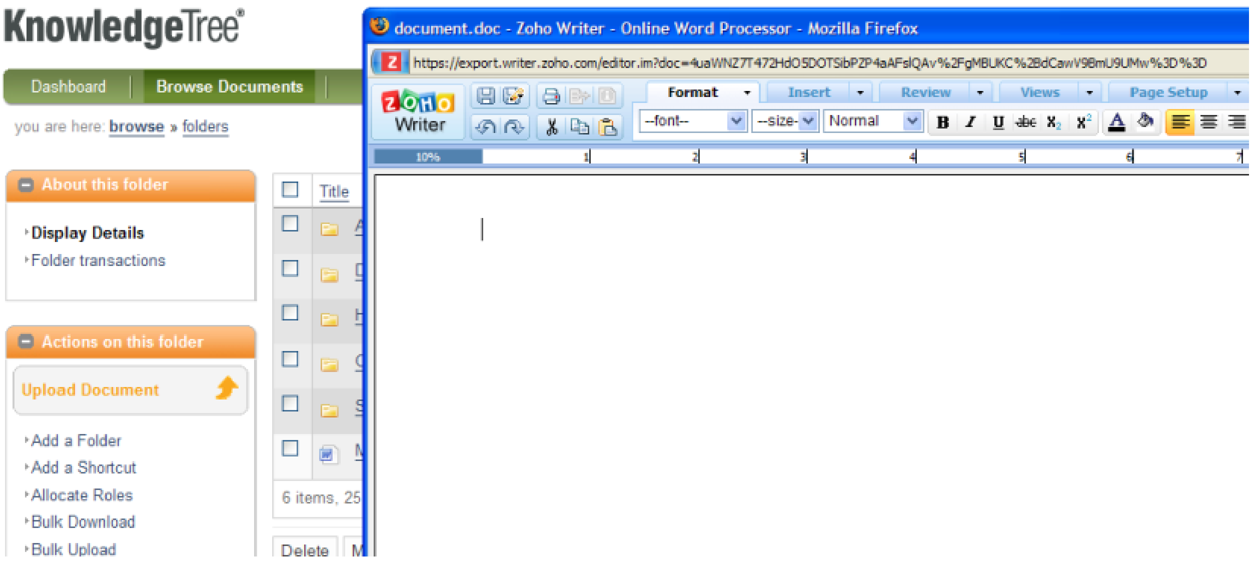
3. In the Actions on this folder menu, click *Create Document Online*.



4. On the Add a document page, specify details for the new document; then, click *Add*.

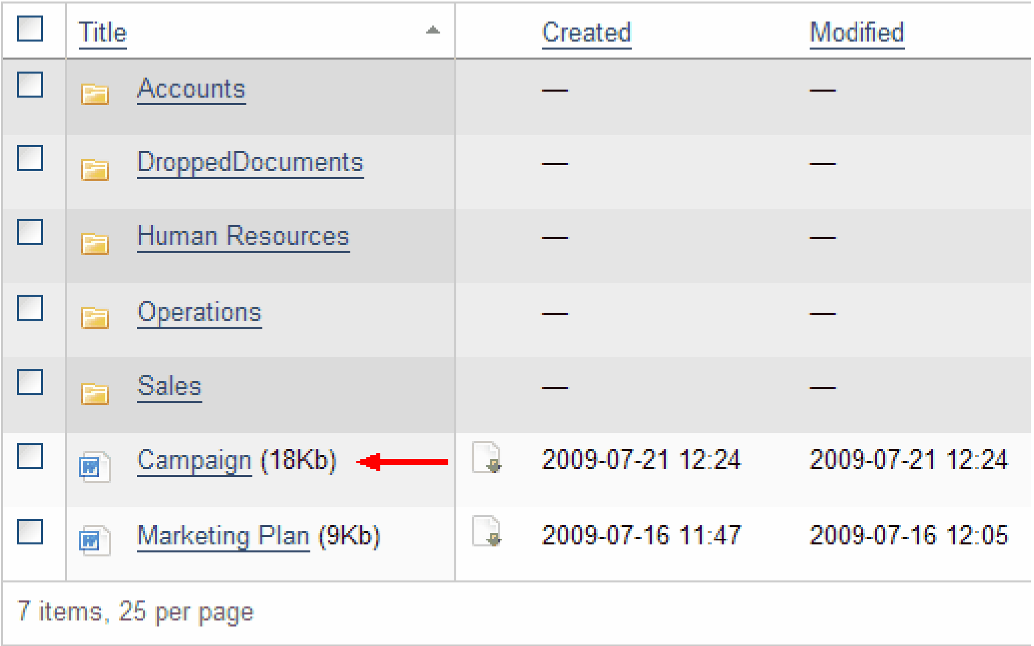


5. A system message displays, informing you that you will be creating this document through an external application (Zoho(R) Writer and Sheet), and that you will need to save the document in the third party application to add it to KnowledgeTree. Click *OK* to open the Zoho(R) Writer and Sheet interface in a new browser window.



6. Add content to the online document; then, when you're done, click the *Save* icon in the

Zoho(R) Writer and Sheet toolbar. The document is added to KnowledgeTree. Close the Zoho(R) interface.
Note: You may need to refresh the KnowledgeTree interface to view the document added to the folder list.



	Title		Created	Modified
☐	Accounts		—	—
☐	DroppedDocuments		—	—
☐	Human Resources		—	—
☐	Operations		—	—
☐	Sales		—	—
☐	Campaign (18Kb)		2009-07-21 12:24	2009-07-21 12:24
☐	Marketing Plan (9Kb)		2009-07-16 11:47	2009-07-16 12:05

7 items, 25 per page

See Also:
[Viewing/Editing Documents Online]

3.2.2.9 Viewing Folder Permissions

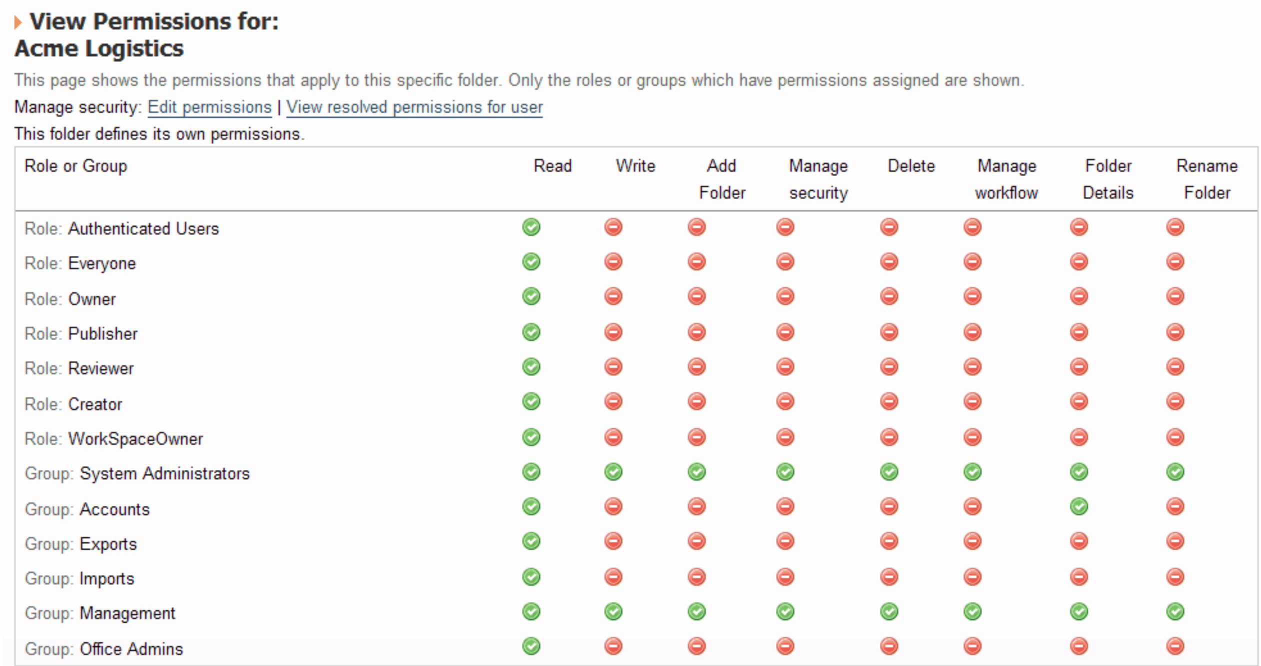
This procedure displays permissions set up on the currently selected folder.

Note: This functionality is only available in the Actions on this folder menu if you have permissions for this action on the folder. For more information about viewing and editing folder permissions, see the KnowledgeTree Administrator Manual.

Perform the following steps:
1. Log in to KnowledgeTree's web interface; then, locate the relevant folder - search, or navigate the folder structure in Browse Documents.

2. Open the folder; then, in the Actions on this folder menu, click *Permissions*.

3. View existing permissions on the folder.



View Permissions for: Acme Logistics

This page shows the permissions that apply to this specific folder. Only the roles or groups which have permissions assigned are shown.

Manage security: Edit permissions | View resolved permissions for user

This folder defines its own permissions.

Role or Group	Read	Write	Add Folder	Manage security	Delete	Manage workflow	Folder Details	Rename Folder
Role: Authenticated Users	✓	−	−	−	−	−	−	−
Role: Everyone	✓	−	−	−	−	−	−	−
Role: Owner	✓	−	−	−	−	−	−	−
Role: Publisher	✓	−	−	−	−	−	−	−
Role: Reviewer	✓	−	−	−	−	−	−	−
Role: Creator	✓	−	−	−	−	−	−	−
Role: WorkSpaceOwner	✓	−	−	−	−	−	−	−
Group: System Administrators	✓	✓	✓	✓	✓	✓	✓	✓
Group: Accounts	✓	−	−	−	−	−	✓	−
Group: Exports	✓	−	−	−	−	−	−	−
Group: Imports	✓	−	−	−	−	−	−	−
Group: Management	✓	✓	✓	✓	✓	✓	✓	✓
Group: Office Admins	✓	−	−	−	−	−	−	−

3.2.2.10 Renaming Folders

This procedure changes the name of the currently selected folder.

Note: This functionality only displays in the Actions on this folder menu if you have the required permissions to rename the currently selected folder. 'Rename' is only available on sub folders (child folders), and not at the Root folder.

Perform the following steps:

1. Login to KnowledgeTree's web interface; then, navigate to or search for the folder you want to rename.

2. Once you're in the folder; click *Rename* in the Actions on this folder menu.

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

3.2.2.11 Viewing Folder Usage Information

This procedure displays reports on how the folder and its sub folders have been used. Usage information may be filtered by:

- user
- general activity - date range, transaction type
- folder content - by workflow and document type

Note: This feature is only available in KnowledgeTree Commercial (on-premise, or KnowledgeTreeLive).

Perform the following steps:

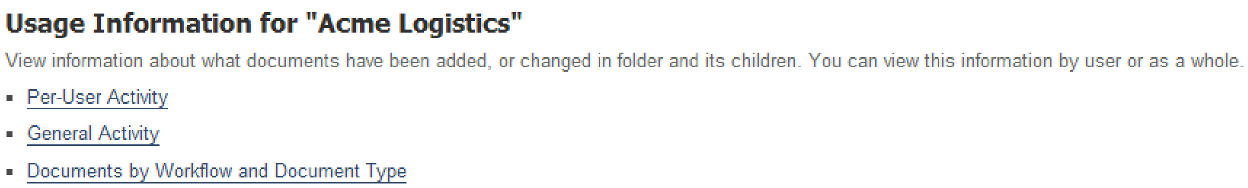
1. Log in to KnowledgeTree's web interface; then, search or browse to the relevant folder.

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

3. Do you want to ...
   - view a report on activity by a specific user? Click *Per-User Activity* to open the Select User page. Enter the user name, or part of the user name; then, click *search for users*. In the displayed result list, click *View Transactions* to open the Specify Search Details page. Enter a date range, select a transaction type, and select a maximum number of items to view; then, click *show transactions*.

   - view a report on the general activity on this folder, which includes all system users? Click *General Activity* to open the Specify Search Details page; then, enter a date range, select a transaction type, and select a maximum number of items to view.

   - view a summary of activity on the folder, which provides details of documents in the folder, filtered by document type, and by workflow states? Click *Documents by Workflow and Document Type*; then, view the displayed report.



3.2.3 Working with Documents

You use the Document Info menu and the Document Actions menus on the Document Details page in Browse Documents to work with documents.

Note: You will only see those actions for which you have the appropriate permissions on the folder where the document is stored.

IMPORTANT - ELECTRONIC SIGNATURES!
When KnowledgeTree's electronic signatures functionality is enabled for your system, you will need to re-authenticate (enter your KnowledgeTree username and password) when performing most actions on documents and folders.

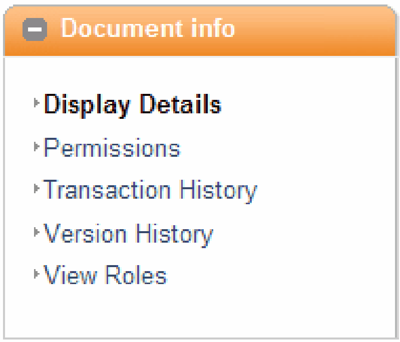
Document Info Menu

- Display Details - the default view on a document's Document Details page. Displays a summary, including: filename, file type, version, etc.

- Permissions - displays the current permissions set up on the currently selected document, e.g. the roles and groups who have permissions, and what permissions they have, e.g. read, write

- Transaction History - displays a transaction history for a currently selected document, and includes a record of all transactions performed on the document

- View Roles - displays the roles who have permissions on the currently selected document



Document actions Menu

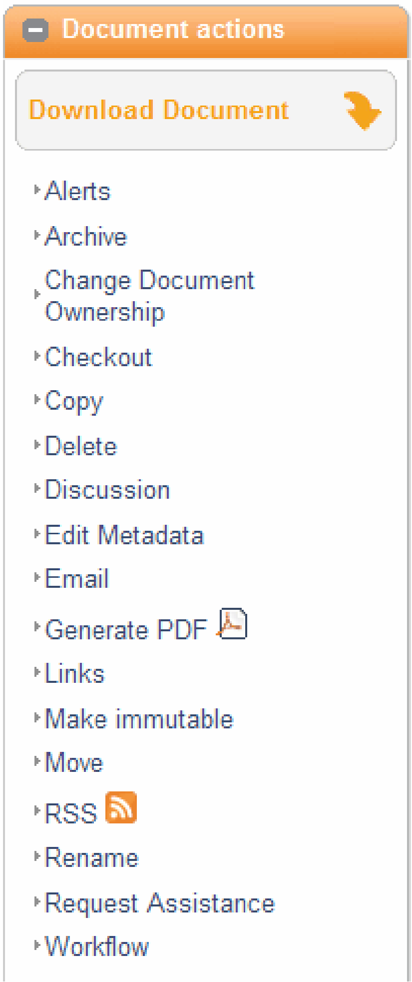
- Check-in - checks in a currently checked out document
Note: This option displays only if the currently selected document is checked out by you

- Cancel checkout - cancels the checked out status of the currently selected document, if you are the user who checked out the document. Any changes you made to the document on your local environment will not be updated the version that is restored to KnowledgeTree

- Download Document - downloads a copy of the currently selected document so that you can view it and/or save it to your local environment

- Alerts - view, edit and delete existing alerts, and add new alerts on the currently selected document
Note: This feature is only available in KnowledgeTree Commercial Editions.

- Archive - removes the document to



the KnowledgeTree archive

- Change Document Ownership - changes the document ownership. The new user becomes the document 'owner'.
- Checkout - checks the document out for editing on your local computer. The document is locked in KnowledgeTree until you check it in after your edit is done.
- Copy - copies the currently selected document to another location in KnowledgeTree.
- Delete - moves the currently selected document to KnowledgeTree's 'deleted documents' storage location. The document may be expunged or restored by the system administrator.
- Discussion - add new discussion threads, display and close existing discussion threads, and a post to an existing thread on the currently selected document
- Edit Metadata - edits the currently selected document's metadata (e.g. the document type and associated information, file name, tags, etc). The metadata version will be updated.
- Email - sends an email message regarding the currently selected document, with an attachment or download link, to internal KnowledgeTree users, or to external users, depending on the email options configured for your system.
- Generate PDF - converts the currently selected document to PDF.
- Links - displays and deletes existing links, and adds new links for the currently selected document. Links may be external (to pages on the Internet for example), or internal (to other KnowledgeTree documents)

- Make immutable - sets the document as 'immutable' so that no further content changes can be made to the document. Note that this action cannot be done.

- Move - moves a document to another location in the repository.
  Note: You must have appropriate permissions on the folder to perform this action.

- RSS - generates a link (URL), which you can copy to an external feed reader in order to view feeds on the document from outside of KnowledgeTree

- Rename - changes the document file name.
  Note: You must have appropriate permissions on the folder to perform this action.

- Request Assistance - sends a request for assistance on the currently selected document, to the system administrator and the document owner.

- Workflow - displays any assigned workflows on the currently selected document, or starts a workflow on the document
  Note: This option displays only if KnowledgeTree workflows supports the document type of the currently selected document, and if you have the appropriate permissions on the folder.

3.2.3.1 Viewing Document Details

This procedure displays a summary of information defined for a currently selected document in Browse Documents.

The Document Details page is the system default view that opens when you click on a document link in the folder view. The page provides the summary of metadata defined for the document, such as:

- filename
- file type
- document version

- created by
- owned by
- date the document was last updated
- document type
- workflow status
- document id
- tags defined on the document
- category
- document author
- media type (e.g. 'Text')

Note: Additional metadata fields may be added by the KnowledgeTree administrator.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, locate the document - search, or navigate the folder structure in Browse Documents to the relevant document.

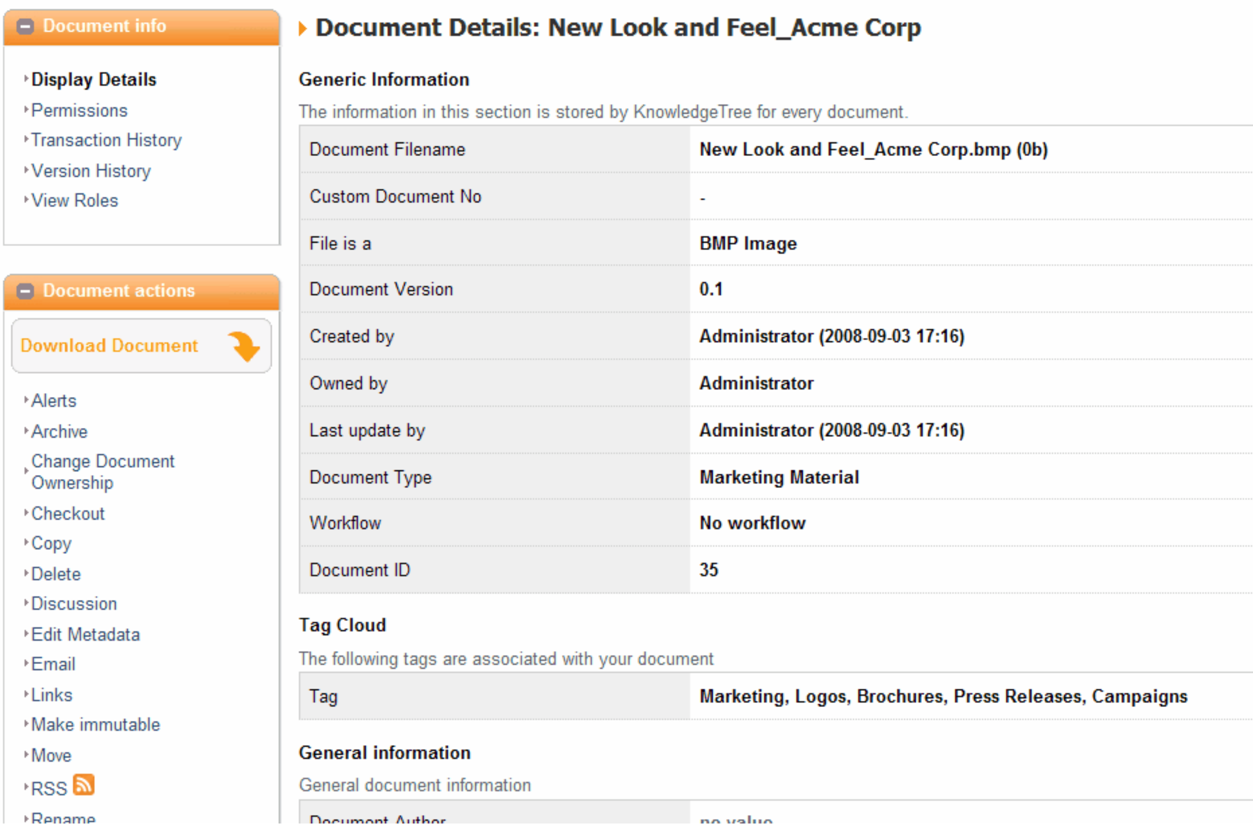
2. Having located the document, click on the document in the folder view to open the document's Document Details page.

3. Now you can ...
   - view metadata information displayed on the page.

   - view any available links created from or to this document, and open linked documents. Existing links display on the right of the page.

   - access the available actions on the document in the Document info menu, which displays on the top left of the page - the following actions may be available: Download, Transaction History, View Roles.

   - access the available actions on the document from the Document actions menu, which displays on the bottom left of the page - the following actions may be available: Discussion, Email, Generate PDF, Links, RSS, Request Assistance.



Document Details Page

3.2.3.2 Viewing Document Thumbnails

This procedure displays a thumbnail preview of a selected document on the Document Details page, and in the folder view.

KnowledgeTree can create thumbnails for the following documents and file types:

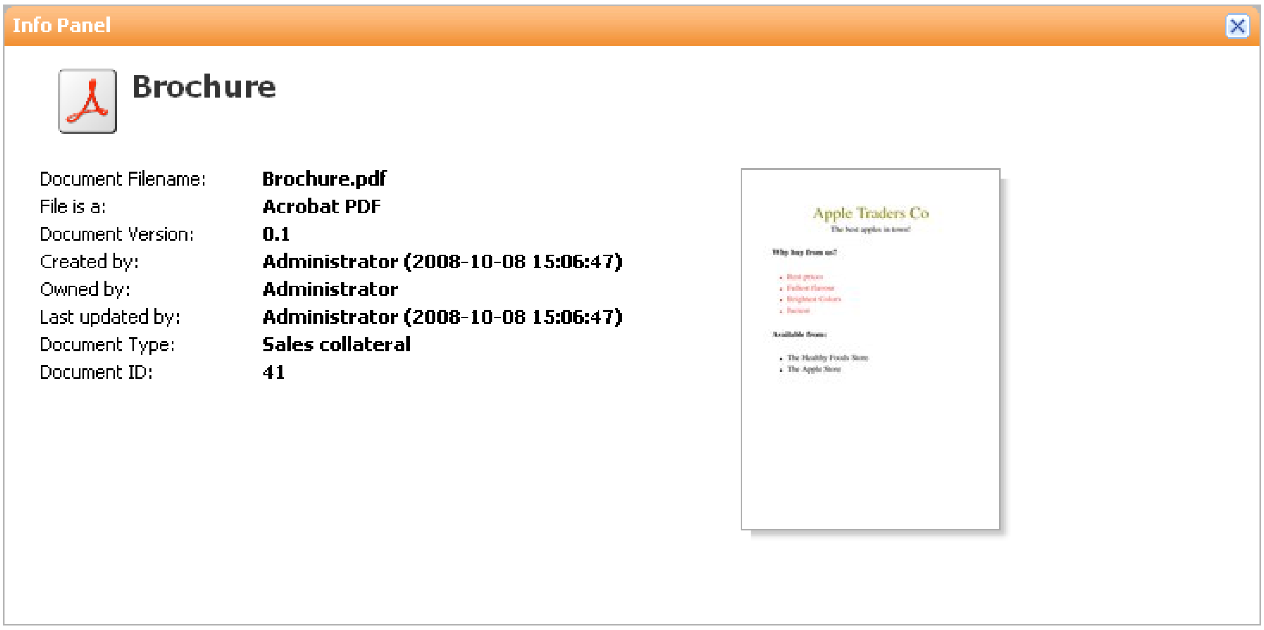
- OpenXML
- Microsoft Office 97-2007 (doc, dot, pot, pps, ppt, rtf, vsd, xls, xlt, docx, dotx, potx, ppsx, pptx, vsd, xlsx, xltx)
- OpenDocument formats (odg, odp, odt, ods)
- PDF
- PNG
- JPG, JPEG
- BMP
- GIF

Perform the following steps:

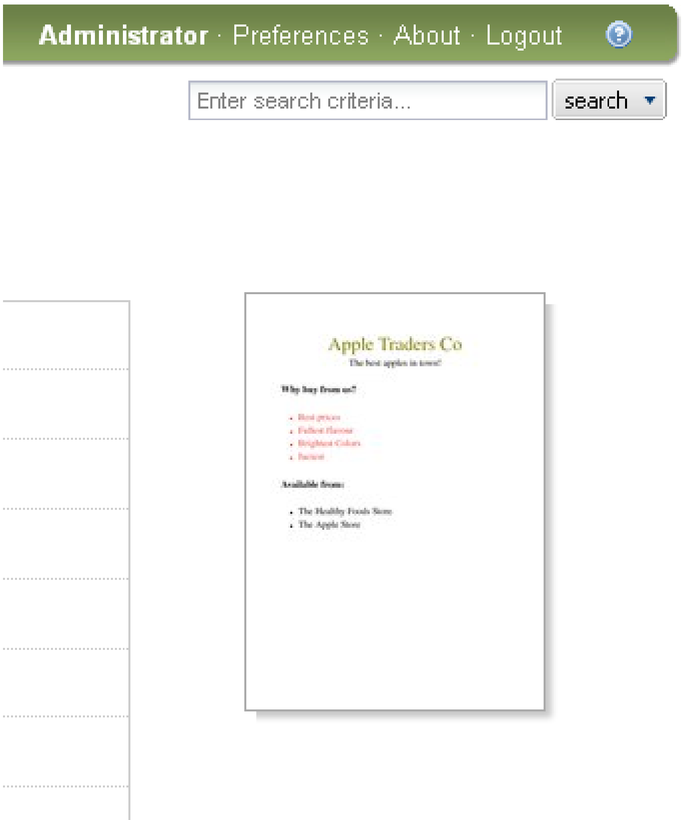
1. Log in to KnowledgeTree's web interface; then, locate the document - search, or navigate to the document in Browse Documents.

2. Are you viewing the document ...

   - in the folder view? Click the Property Preview icon next to the document. A list of properties and a thumbnail for the document are displayed in the Info Panel.



- on the document's Document Details page? The document thumbnail displays on right-hand side of the page.



3.2.3.3 Instant View

This procedure displays an inline, flash-based preview of a selected document (of a supported file type), within the Browse view, through KnowledgeTree's web interface.

Note: This feature is only available for KnowledgeTree commercial editions - on-premise, and KnowledgeTreeLive (the hosted version of KnowledgeTree commercial edition). This feature is enabled through the Instant View plugin.

Instant View works with the following documents and file types:
- OpenXML
- Microsoft Office 97-2007 (doc, dot, pot, pps, ppt, rtf, vsd, xls, xlt, docx, dotx, potx, ppsx, pptx, vsd, xlsx, xltx)
- OpenDocument formats (odg, odp, odt, ods)
- PDF
- PNG
- JPG, JPEG
- BMP
- GIF

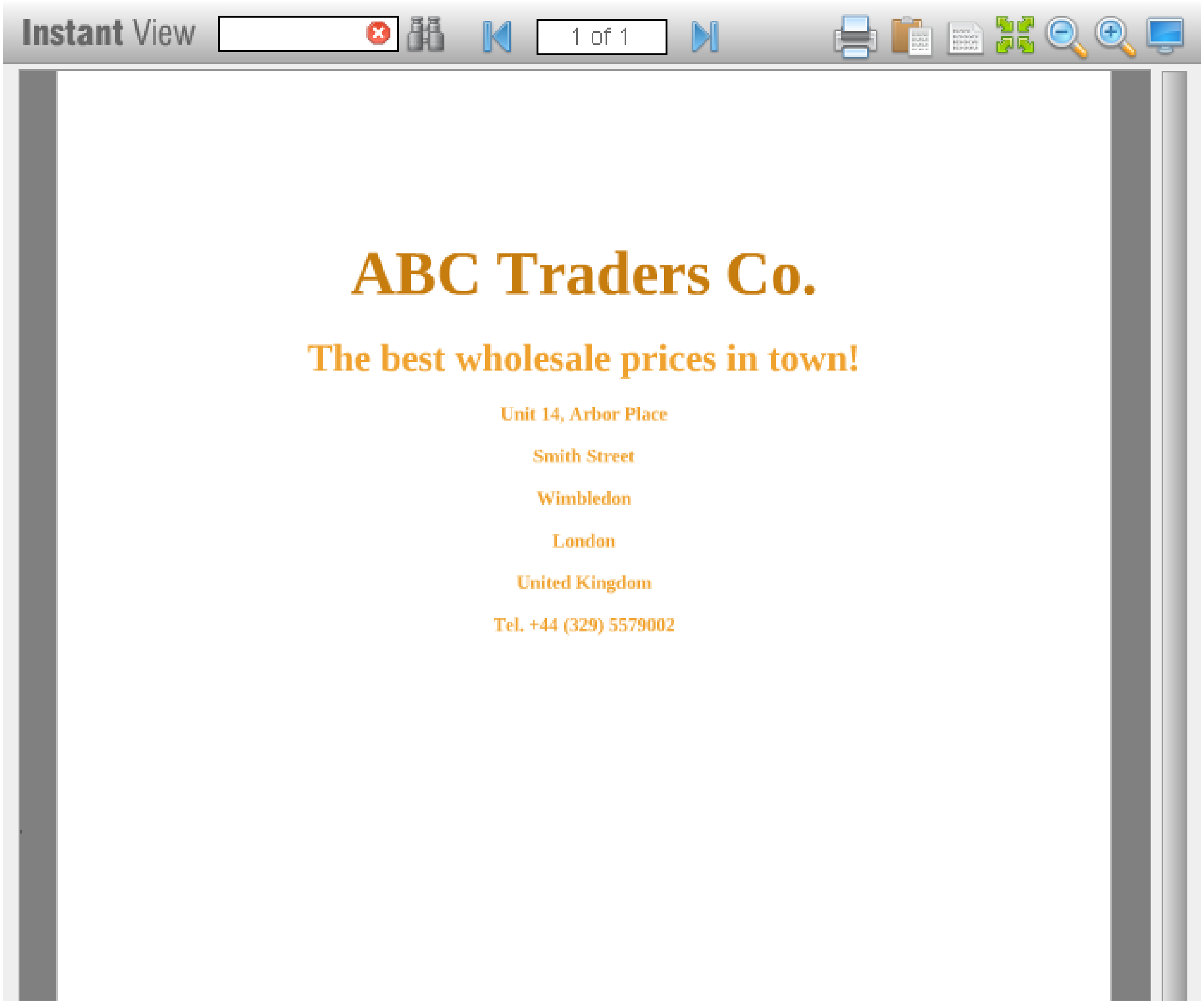
Perform the following steps:

1. Follow the steps for viewing a document thumbnail Viewing Document Thumbnails.

2. Click the document thumbnail.

3. View the flash-based preview of the document in the Instant View screen. The following actions are available:

- go to a page in the document
- print the document
- copy contents of the current page to the clipboard (only works with text-searchable pdf)
- zoom - page width, whole page, zoom in, zoom out
- view the document in full screen mode



3.2.3.4 Viewing/Editing Documents Online

This procedure displays and edits your Microsoft Office (.doc, and .xls) KnowledgeTree documents online, through Zoho(R) Writer and Sheet.

Note: This feature is only available for KnowledgeTreeLive, and is provided through the Zoho plugin (enabled by default). The KnowledgeTree system administrator may disable this plugin through KnowledgeTree's web interface Administration module. For more information on managing plugins, see the KnowledgeTree Administrator Manual.

Watch the Zoho Integration webcast.

Perform the following steps:

1. Use your KnowledgeTreeLive account credentials - URL, username, and password - to log on to KnowledgeTree.
2. Locate the folder where you want to create a new document online, or view and edit a document online - navigate to the folder through Browse Documents, or search for the folder.

3. Locate the document in the folder list; then, click the Zoho icon  (in the Zoho column) for the relevant document.
   Note: This action is only available for supported file types (DOC and XLS).

4. A system message displays, informing you that the document will be checked out for viewing/editing within a third party application (Zoho(R) Writer and Sheet). Click *OK* to open the document within the Zoho interface.

5. Your KnowledgeTree document is checked out. View and/or edit the document online within the Zoho Writer interface. You can use the Zoho(R) Writer and Sheets editing tools to edit your document.

6. When you're done, click the Save icon on the Zoho(R) Writer and Sheet toolbar to save your changes to KnowledgeTree. A new version of the document is added to KnowledgeTree. The document version history and the document transaction history is updated.

See Also:
Creating documents online

3.2.3.5 Viewing Document Permissions

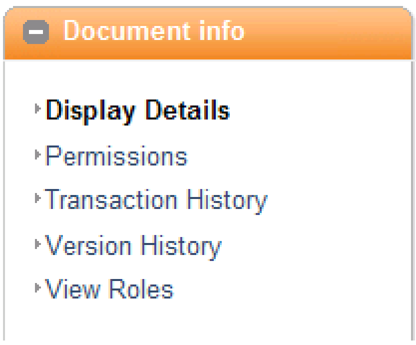
This procedure displays the current permissions set up on a currently selected document.

Note: Only users with the 'Manage Security' permission on a document are allowed to view document permissions. Permissions at the document level are inherited from the folder where the document resides, or from a workflow (if the document is part of a workflow). Permissions are changed at the folder level, and not for individual documents.

Perform the following steps:

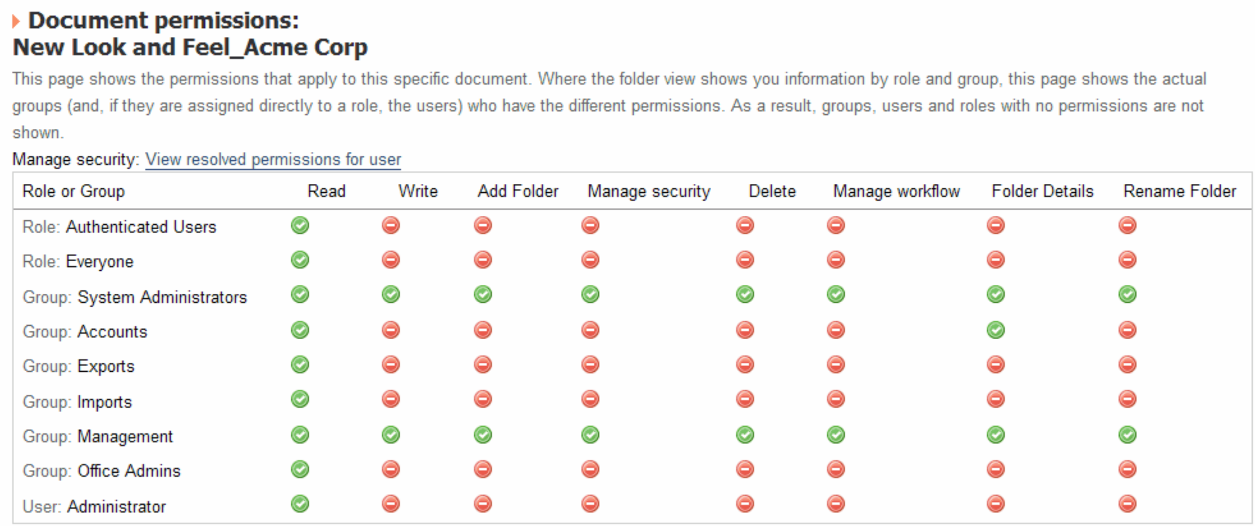
1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

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



3. On the Document Permissions page you can ...

- view current permissions on the document, by role and by group, Or;
- click View resolved permissions for user in order to view the permissions that individual system users have on this document.



Document permissions:
New Look and Feel_Acme Corp

This page shows the permissions that apply to this specific document. Where the folder view shows you information by role and group, this page shows the actual groups (and, if they are assigned directly to a role, the users) who have the different permissions. As a result, groups, users and roles with no permissions are not shown.

Manage security: View resolved permissions for user

Role or Group	Read	Write	Add Folder	Manage security	Delete	Manage workflow	Folder Details	Rename Folder
Role: Authenticated Users	✔	⊖	⊖	⊖	⊖	⊖	⊖	⊖
Role: Everyone	✔	⊖	⊖	⊖	⊖	⊖	⊖	⊖
Group: System Administrators	✔	✔	✔	✔	✔	✔	✔	✔
Group: Accounts	✔	⊖	⊖	⊖	⊖	⊖	✔	⊖
Group: Exports	✔	⊖	⊖	⊖	⊖	⊖	⊖	⊖
Group: Imports	✔	⊖	⊖	⊖	⊖	⊖	⊖	⊖
Group: Management	✔	✔	✔	✔	✔	✔	✔	✔
Group: Office Admins	✔	⊖	⊖	⊖	⊖	⊖	⊖	⊖
User: Administrator	✔	⊖	⊖	⊖	⊖	⊖	⊖	⊖

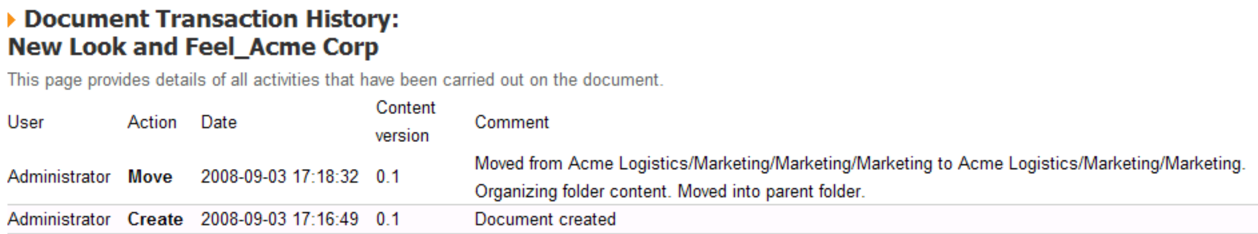
View Document Permissions

3.2.3.6 Viewing a Document Transaction History

This procedure displays a transaction history for a currently selected document, and includes a record of all transactions performed on the document.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.
2. In the Document info menu, click *Transaction History* to open the document's Transaction History page.
3. The document Transaction History provides the following details for each transaction that has occurred on this document: username, action, date, content version, comment.



Document Transaction History:
New Look and Feel_Acme Corp

This page provides details of all activities that have been carried out on the document.

User	Action	Date	Content version	Comment
Administrator	**Move**	2008-09-03 17:18:32	0.1	Moved from Acme Logistics/Marketing/Marketing/Marketing to Acme Logistics/Marketing/Marketing. Organizing folder content. Moved into parent folder.
Administrator	**Create**	2008-09-03 17:16:49	0.1	Document created

View Document Transaction History

3.2.3.7 Viewing Roles

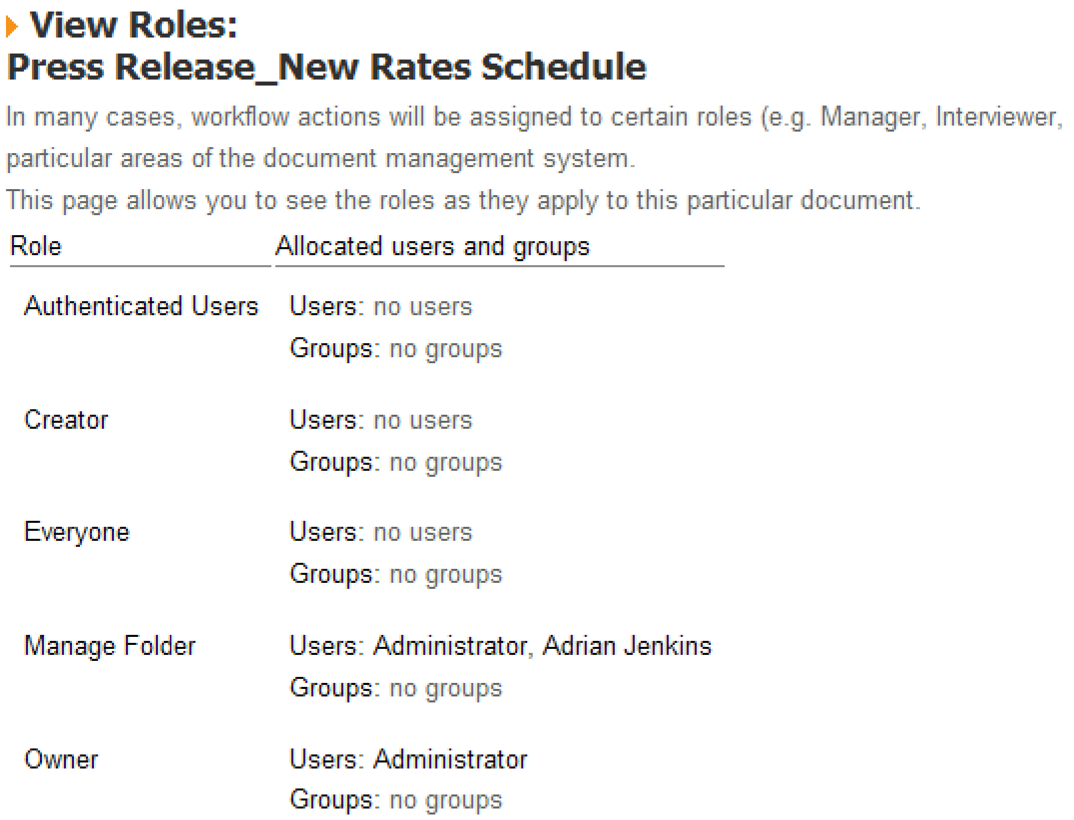
This procedure displays current role allocations on the selected document.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. In the Document info menu, click *View Roles*.

3. The View Roles page displays a list of roles that exist in the system, and which have permissions on the currently selected document.



3.2.3.8 Downloading Documents

This procedure downloads a copy of a document from the repository to your local computer.

Downloading a document allows you to view the document, and to save a copy of the document locally without checking the document out of the repository. Any changes you make to the locally saved document are not saved to the version in the repository. To update a document stored in the repository, you need to check out the document, make your changes, and then check the document back in to the repository.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details

page.

2. In the Document actions menu (located on the top left of the page), click *Download Document*.

3.2.3.9 Configuring Alerts

This procedure displays, edits, and deletes existing document alerts, and adds new document alerts on a currently selected document.

Note: This feature is only available in KnowledgeTree Commercial (on-premise, or KnowledgeTreeLive).

Note: Adding an alert allows the system to notify the creator of the alert, other users that may be included in the alert, when action is due on the document. Users included in the alert receive an email and a dashboard notification when the alert is triggered.

Note: Document Type Alerts
Document Type Alerts is a feature in KnowledgeTree that allows the system administrator to create an alert on a document based on its document type - the alert is automatically applied to all documents of the specified document type. Users view document type alerts listed as an existing 'system' alert for the document. When the system alert (document type alert) is triggered, affected users receive an email advising them of the action to take for the document type alert, and a message for the alert displays on the Dashboard.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the relevant document's Document Details page.

2. In the Document actions menu, click *Alerts*.

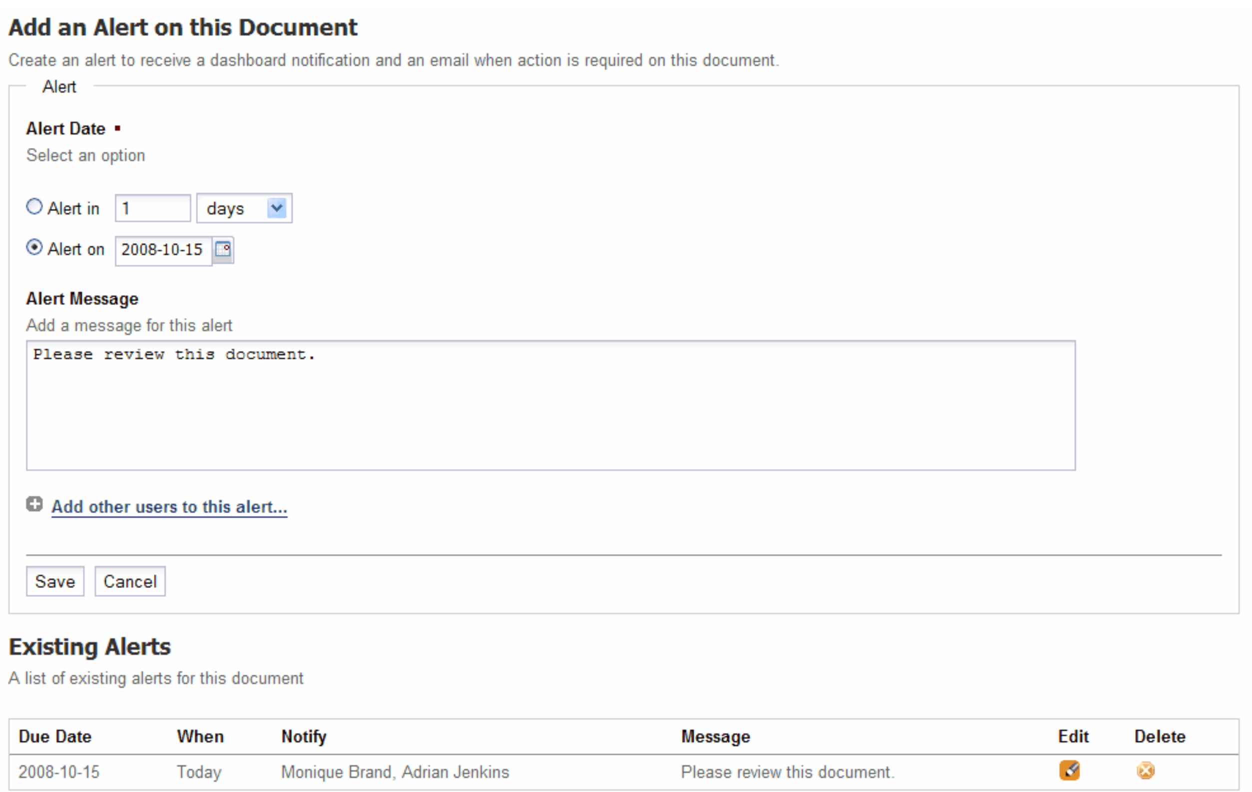
3. Do you want to ...
   - view existing alerts on this document? In the Existing Alerts section on the page, view existing alerts displayed on the page.

   - edit an alert on this document? In the Existing Alerts section on the page, click the *Edit* icon for the relevant alert. Make the required changes; then, click *Save*.

   - delete an alert on this document? In the Existing Alerts section on the page, click the *Delete* icon for the relevant alert.

   - add an alert on this document? Go to step 4.

4. To add a document alert:
   4.1. In the Alert Date section, define an alert date - define a number of days until this alert is active, or select a calendar date.
   4.2. In the Alert Message section, add a message to attach to this alert, if required.
   4.3. To add other users as recipients of this alert, click *Add other users to this alert ...; then, select the relevant users.*
   4.4. Click *Save*.



Adding and Viewing Alerts

3.2.3.10 Archiving Documents

This procedure archives a currently selected document.

Archiving clears up space in KnowledgeTree to speed up search and indexing, and hides the document from the folder view in Browse Documents.

⊟ How do I find an archived document and get it restored?
To find an archived document, you can ...

- enter the document ID in the Go to Document ID dashlet on the dashboard
- search for the document through an Advanced Search, including the following criteria: isArchived

Requesting De-archival
Having located the archived document, you can send an online request to the system administrator to request de-archival of the document. The system administrator receives de-archival requests via email and through a notice in the Items Requiring Your Attention dashlet.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. In the Document actions menu, click *Archive* to open the Archive page.

3. Enter a reason for archiving the document in the Reason field; then, click Archive Document.

Note: The system re-opens the folder view, and sends an email to the document creator that the document has been archived.

3.2.3.11 Changing Document Ownership

This procedure changes the document ownership. The new user becomes the document 'owner'.

Note: Changing the document owner may restrict access to the document if the new owner does not have the correct permissions on the document.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.
2. In the Document actions menu, click *Change Document Ownership* to open the Change Ownership page.
3. Select the new user; then, click *Submit*.

3.2.3.12 Checking out Documents

This procedure checks a document out for editing on your local computer.

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

An administrator can override the checked out status of a document by cancelling the check out. In this case, the user who performed the check out will need to check the document out again to redo the changes and then check the document back in to update the version in KnowledgeTree. The Dashboard displays a list of documents that you have checked out when you log on. This reminds you to check in documents where you may have forgotten to do so.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.
2. In the Document actions menu, click *Checkout*.
3. Enter a comment in the Reason field to describe you're checking out the document.
4. Define whether you want to download the document as part of the checkout; then, click *Checkout document*.

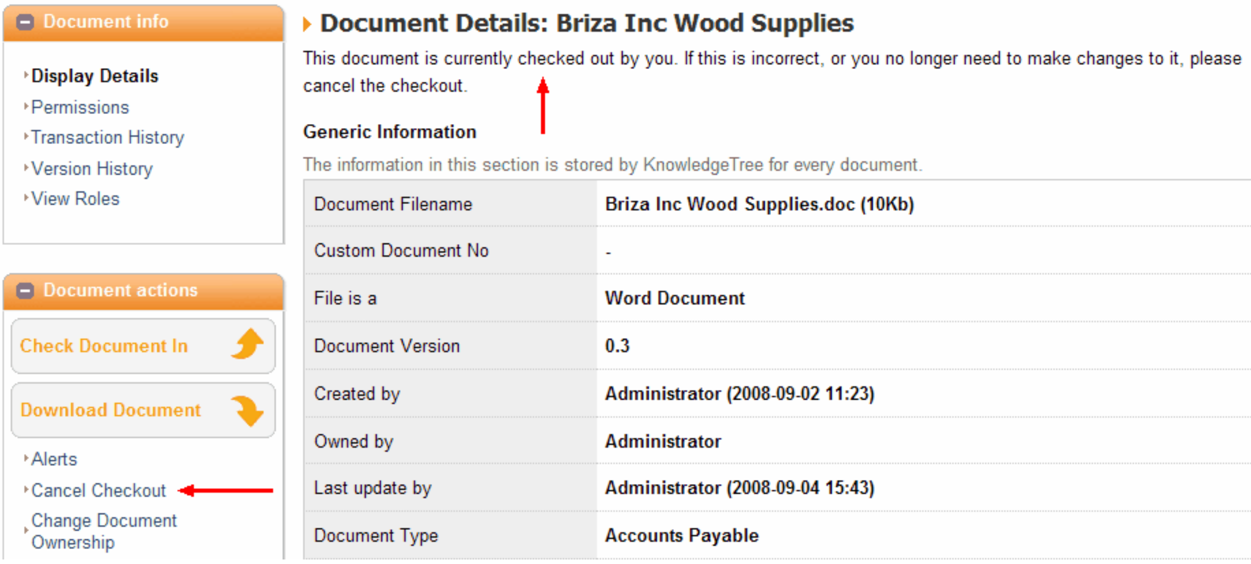
3.2.3.13 Canceling Checked Out Documents

This procedure cancels the checked out status of a document and restores the document to KnowledgeTree to the version in KnowledgeTree before check out (i.e. the document version is not updated).

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. In the Document actions menu, click *Cancel Checkout.*



Cancel checkout

3.2.3.14 Checking-in Documents

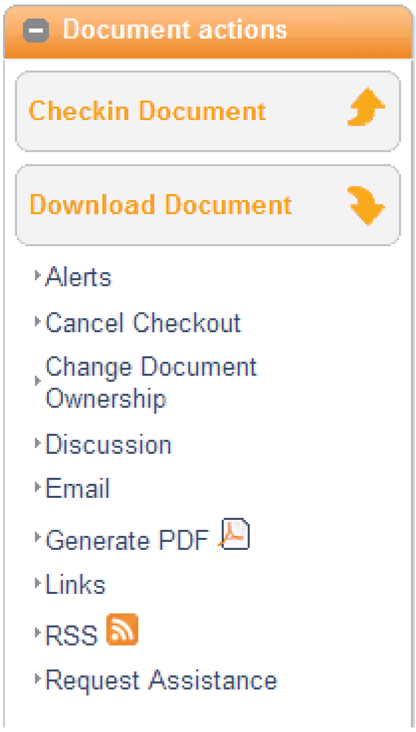
This procedure checks in a document that was previously checked out of the repository.

Any document that is checked out of the repository is unavailable for other users to edit, move, delete, or archive. Checking in a document increments the document version number - by 1.0 if this is a major update; or, by 0.1 if this is not a major update.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. In the Document actions menu, click *Check in Document*.



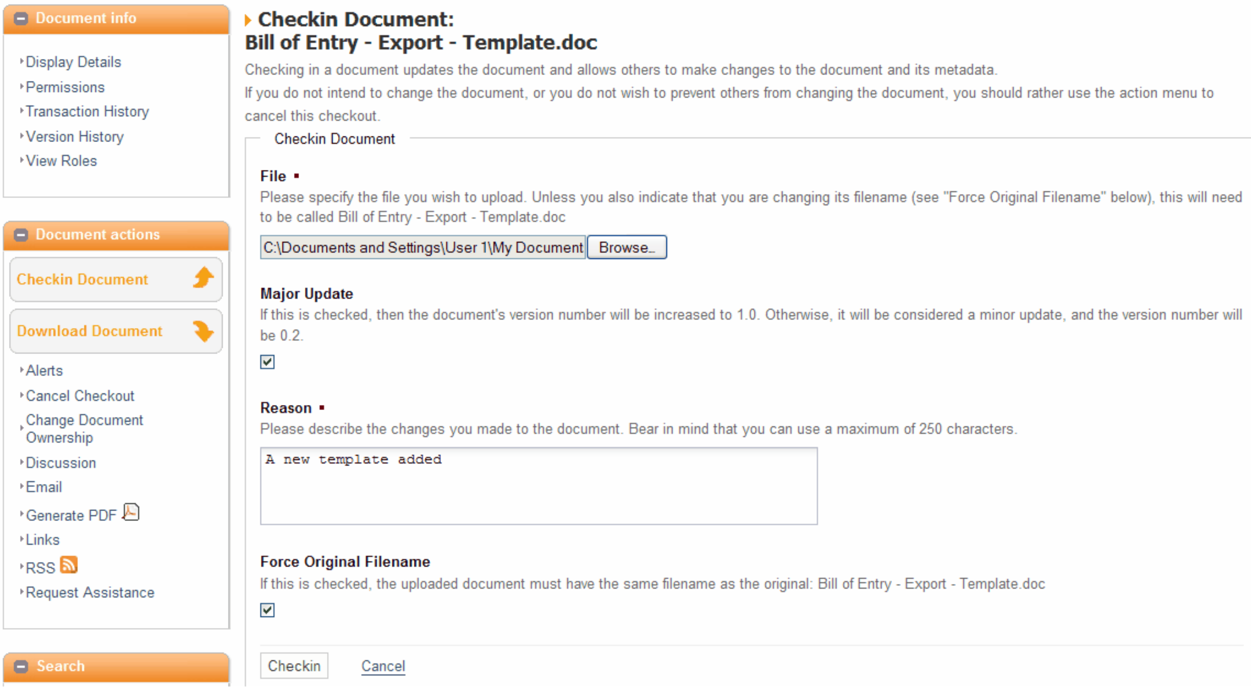
3. Specify the path to the document location in the File field; or, click *Browse* to locate the document.

4. Is this a ...
   - major update? Select the Major Update check box.
   - minor update? Leave the Major Update check box de-selected.

5. Type a brief comment in the Reason field to explain the changes made to this document.

6. Do you want to ensure that the document is checked back in to the repository using only the original file name?
   - Yes. Select the Force Original Filename check box.
   - No. Leave the Force Original Filename check box de-selected.

7. Click *Check-in* to upload the document.



Fill out the Check in Form

3.2.3.15 Copying Documents

This procedure copies a currently selected document to another location in the repository.

The Copy Document [document name] page allows you to browse the folder structure to select a target destination.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.
2. In the Document actions menu, click *Copy*.
3. Navigate the folder structure to select the destination folder where you want to copy the document.
4. Enter a reason for the copy action; then, click *Copy*.
   Result: The document is copied to the new folder location, and the Document Details page for the document opens at the new folder location.

3.2.3.16 Deleting Documents

This procedure moves a currently selected document to KnowledgeTree's deleted documents storage location.

Note: Deleted documents and folders remain in the repository and may only be expunged (permanently removed) or restored by your KnowledgeTree administrator. Documents are restored and expunged in the Document Storage section of DMS Administration.

Pre-requisites:
- You must have the appropriate permissions on the document or folder to delete it.

Note on deleting Immutable documents:
Non-administrative users are not able to delete immutable documents. Only administrative users may delete Immutable documents, and then only through the Delete action from the immutable document's Document Detail page.

Perform the following steps:
1. Login to KnowledgeTree's web interface; then, search for the relevant document, or navigate the folder structure in Browse Documents to locate the relevant document.

2. The following options may be used to delete a document:
- If you are viewing the document's Document Detail page; then, use the *Delete* link in the Document actions menu to delete the document.

- If you are viewing the document along with other documents and folders in the list of contents in the folder view; then, select the check box adjacent to the document (select the check box for each document and folder you want to delete); then, click the *Delete* button at the bottom of the page.

3. Specify the reason for the deletion; then, click *Delete*.
   Note: The document/s and/or the folder/s you selected are removed from the folder, and this action is recorded in the Transaction History reports.

3.2.3.17 Viewing/Managing Discussion Threads

This procedure displays and closes an existing thread, adds a post to an existing thread, and creates a new discussion thread on an existing document.

⊟ What are discussion threads?
Discussion threads are a collaboration tool that provide a forum for users to share their ideas on a document. You can view and add to existing discussion threads for a currently selected document, or create a new discussion thread.

Perform the following steps:
1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

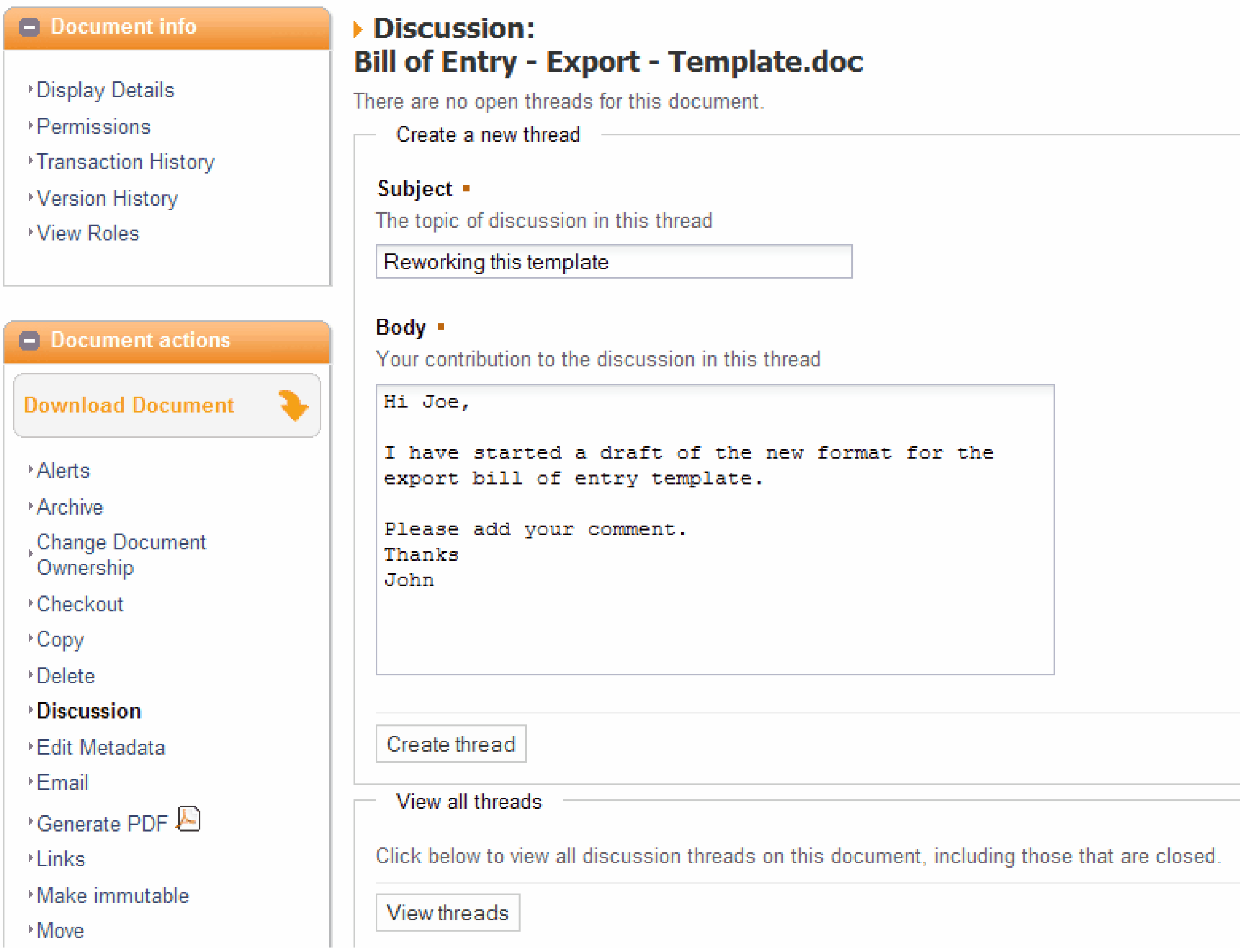
2. In the Document actions menu, click *Discussion*.

3. Do you want to:
   - view all threads on this document, including closed threads? Scroll to the bottom of the page; then, click *View threads.* A list of past and existing threads displays at the top of the page, with the following information on each thread: subject, creator, number of views, number of replies, date of last activity, current state, and concluding comment.

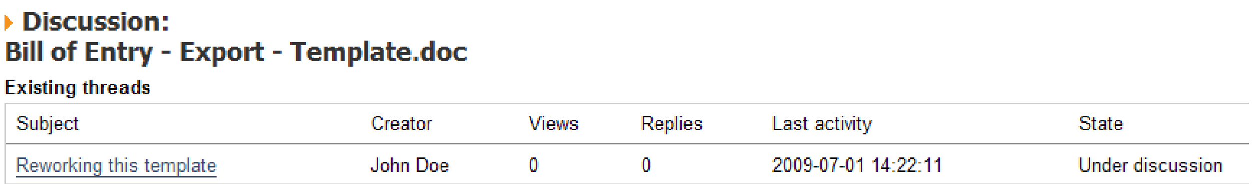
   - create a new thread? Enter a topic in the Subject field; then, add your comment in the Body field. Click *Create thread*. By default, the first state on a thread is 'Under discussion'.

   - open an existing thread to add to a discussion? Click on the thread subject in the Existing threads section to open the thread. Add a subject for your post; then, add a comment. If the matter requires further discussion, leave the state unchanged. By default, the state of a thread is 'Under discussion' until a user moves the thread to the 'concluded' state, and thereafter to 'closed'. By default, threads move through the following states in succession: Under discussion, Conclusion, Closed. Click *Post reply*.

   - close a thread? Click on the thread subject in the Existing threads section to open the thread. Enter a subject line for your final comment; then, add a comment. Click *Post reply*; then, select Closed from the State pick list. In the Reason field, specify a reason for closing the thread; then, click *Change state*.



Adding a new discussion thread



Subject	Creator	Views	Replies	Last activity	State
Reworking this template	John Doe	0	0	2009-07-01 14:22:11	Under discussion

View existing discussion threads

3.2.3.18 Editing Document Metadata

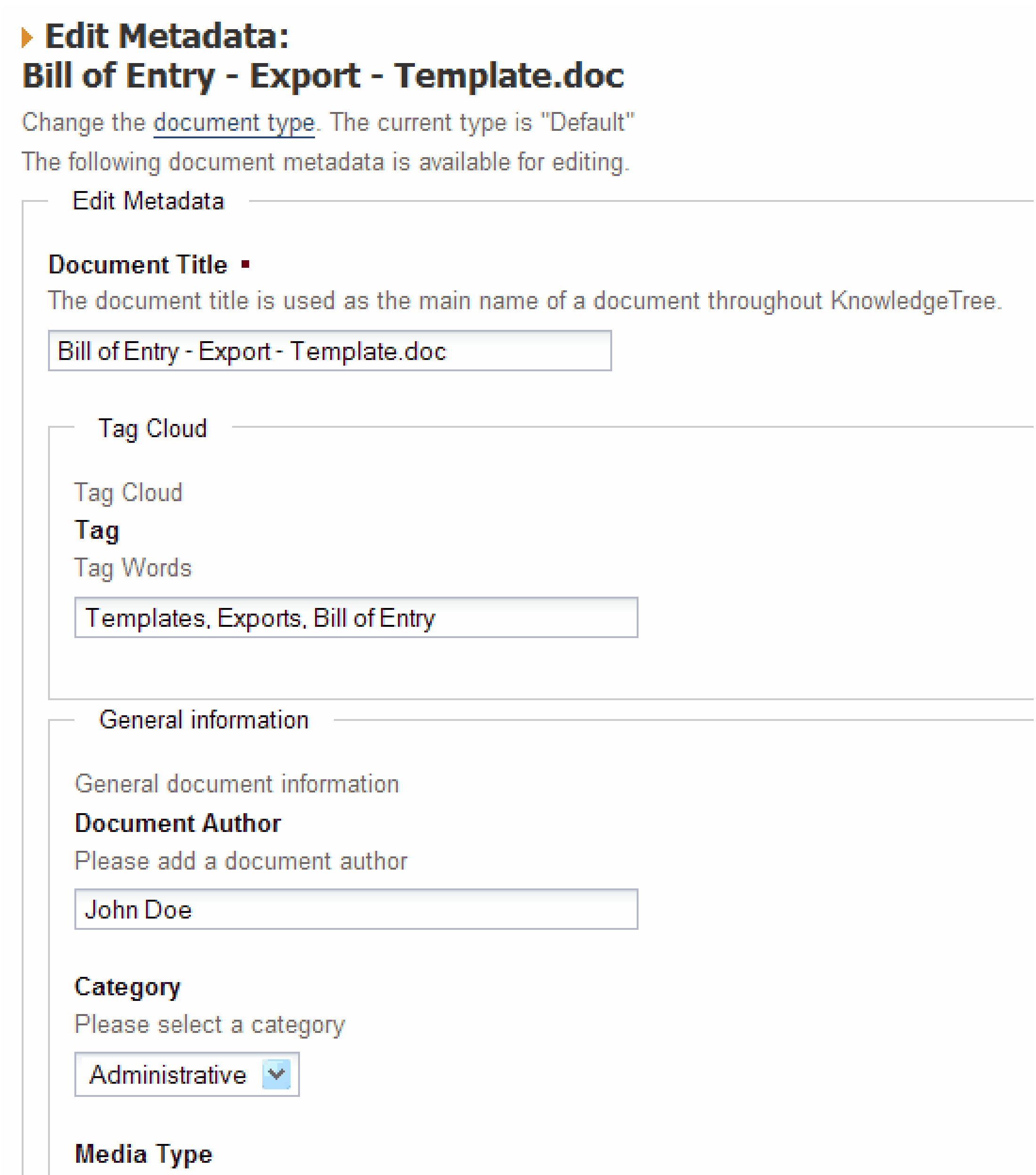
This procedure edits a currently selected document's document type and associated metadata, and edits the document's generic metadata.

Note: Editing metadata updates the metadata version, and not the content version number.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. In the Document actions menu, click *Edit Metadata* to open the Edit Metadata page. *Note: This page displays metadata fields that are associated with the document's current document type, and metadata that applies to all document types in the system.*



Edit document metadata

3. Do you want to ...
   - change the document type? Click the document type link to open the Change Document Type page. Select a document type from the New Document Type pick list; then, click *Update Document*. You will need to update the metadata associated with the new document type. Update the document metadata, now including metadata specific to this document type.

   - edit existing metadata? View existing metadata values on the page, and make the changes in the various fields as required.

4. When you're done, click *Update Document*.

3.2.3.19 Sending Emails

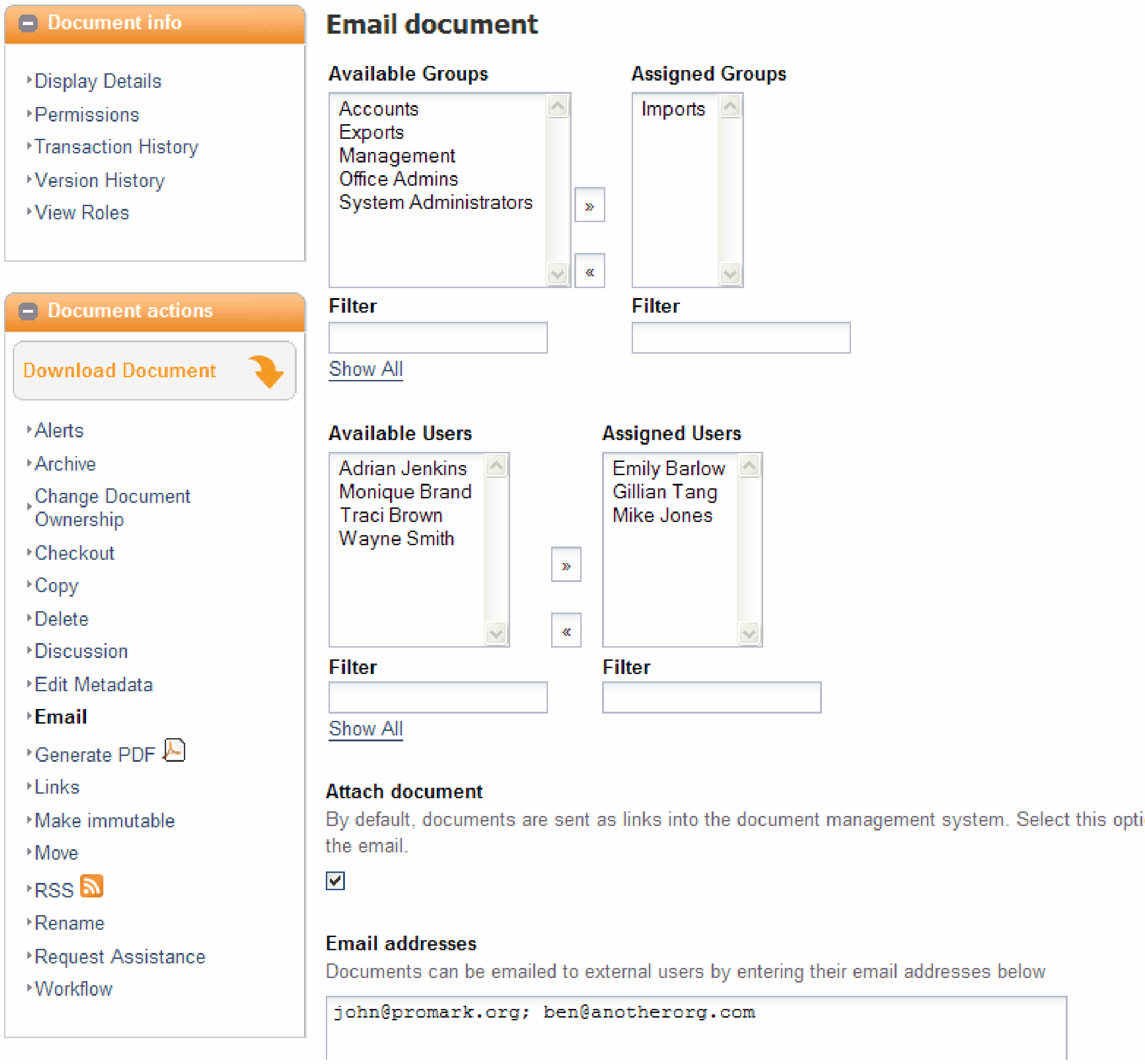
This procedure sends an email message, with an attachment or download link, to internal KnowledgeTree users, or to external users.

Notes:

- *This option displays only when Email is configured for your system.*
- *Internal (KnowledgeTree users) recipients of emails may click on the link in the email to go directly to the document in KnowledgeTree, and log in may be required. External recipients receive a unique, one-time, download link that provides view-only access only to the relevant document - thus, log in is not required for external users.*

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.
2. In the Document actions menu, click *Email* to open the Email document page.
3. Select email options:
   - select internal recipients (users and/or groups) - populate the Assigned Groups / Assigned Users columns.
   - define whether to send the document as an attachment; by default a document link is sent
     Note: This setting must be enabled for your system to display on this page.
   - define the email addresses of external users, if applicable
     Note: This setting must be enabled for your system to display on this page.
4. In the Comment field, enter a message for the email recipients; then, click Email.



Sending Emails

3.2.3.20 Generating PDFs

This procedure converts a currently selected document to PDF format.

Note: This feature is only available in KnowledgeTree Commercial (on-premise, or KnowledgeTreeLive).

Pre-requisites:
- You must have a PDF Reader installed
- The document must be a supported file format for PDF Conversion in KnowledgeTree.

Supported File Formats for PDF Conversion
doc, ods, odt, ott, txt, rtf, sxw, stw, xml, pdb, psw, ods, ots, sxc, stc, dif, dbf, xls, xlt, slk,

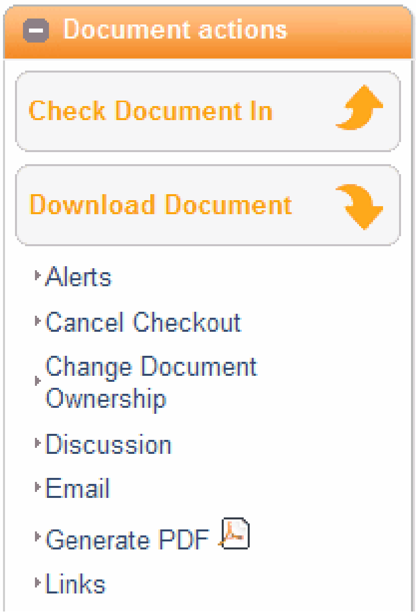
csv, pxl, odp, otp, sxi, sti, ppt, pot, sxd, odg, otg, std, asc

Note: This action displays only when the currently selected document is a supported file format for PDF conversion.

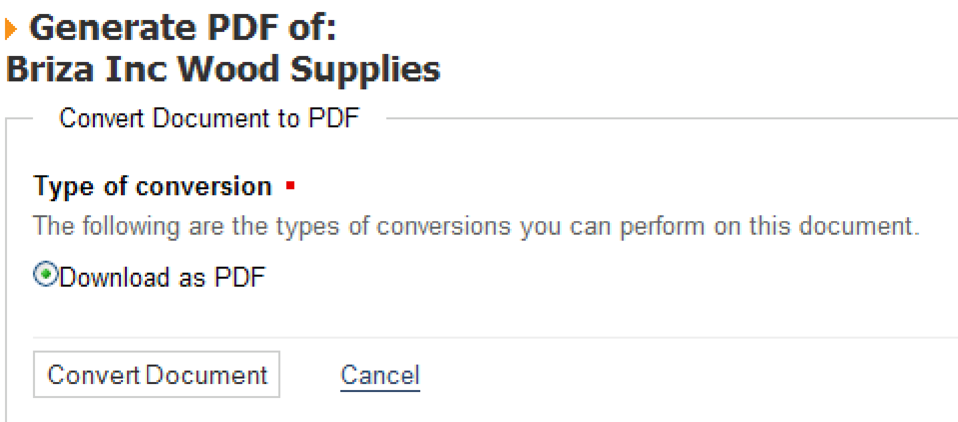
Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's [Document Details](#) page.

2. In the Document actions menu, click *Generate PDF* to open the Generate PDF of: [document name] page.



3. Click *Convert Document*.
   Result: Your browser will prompt you what to do with the generated PDF.



3.2.3.21 Viewing/Adding Document Links

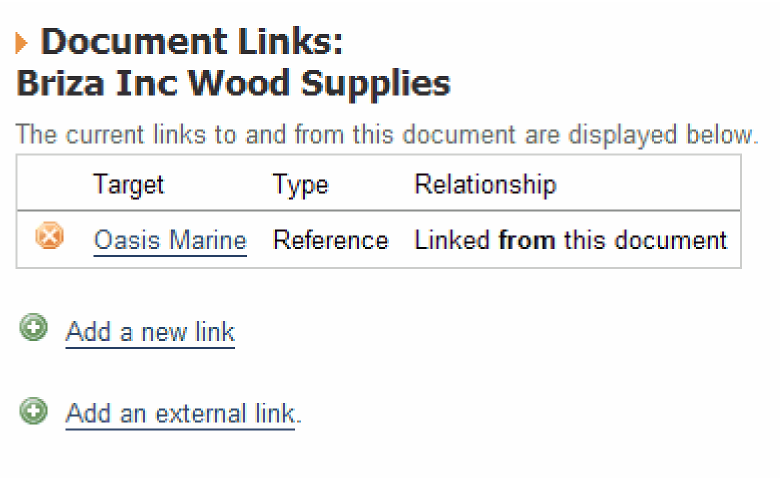
This procedure removes and displays existing links, creates new links (internal or external), and opens linked documents on a currently selected document.

Document links establish associations between documents in the repository, and to link to pages or sites on the Internet.

Note: When creating document link types, the administrator specifies the type of relationship that the link implies between the linked documents – i.e. 'associated with', or 'duplicated by'. KnowledgeTree ships with the following predefined link types: Attachment, Reference, Copy.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.
2. In the Document actions menu, click *Links* to open the Document Links page.
3. Do you want to..
   - view existing links? View the list of links (if any) on the page.
   - view a linked document? Click on the document name in the Target column.
   - delete an existing link? Click the delete icon adjacent to an existing link.
   - add a link to one or more documents in the repository? Click Add a new link to open the Add Link page. Select the target documents; then, click Link. Select a link type from the pick list; then, click Link.
   - add an external link? Click *Add an external link* to open the Add External Link page. Define a name for the link and add the URL; then, click Link.



3.2.3.22 Making Documents Immutable

This procedure makes a document immutable so that no further content changes can be made to the document.

Warning! This action cannot be undone. No further content changes will be allowed, and only the system administrator, working in Administration Mode, may edit the metadata of an immutable document.

Note: If your system is configured to use KnowledgeTree's Electronic Signatures functionality, you will need to provide your KnowledgeTree username and password, and a reason for your action, in order to re-authenticate to the system when performing this action.

Perform the following steps:

1. Log in to KnowedgeTree's web interface; then, search for or browse to the relevant document.

2. In the Document Actions menu, click *Make Immutable*.

3. View the warning message; then, confirm the action. The document is made immutable.
   Note: No further content changes will be allowed. The document's 'immutable' status cannot be undone. If you need to make any further changes to the document metadata, you will need to request assistance from your system administrator.

3.2.3.23 Moving Documents

This procedure moves a document to another location in the repository.

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

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.

2. In the Document actions menu, click *Move* to open the Move Document page.

3. Browse to the destination folder.

4. In the Reason field, specify the reason for moving the document; then, click *Move*.
   Note: The documents and/ or folders you moved display in the Browse Documents table in their new location.

3.2.3.24 Renaming Documents

This procedure renames the file name of a document, if you have 'write' permissions on the document.

Note: This action does not change the document title. It only changes the file name. For example, if you *have a jpeg image file in the repository, and you want to change it into a bitmap. This involves renaming the file from filename .jpeg to filename .bmp; then, checking out the .jpeg file and checking in the bitmap version.*

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.
2. In the Document actions menu, click *Rename* to open the Rename document page.
3. Enter the new file name in the New file name field; then, click *Rename*.

3.2.3.25 Requesting Assistance

This procedure sends a request for assistance on a document to the system administrator and the document owner.

Perform the following steps:

1. Log in to KnowledgeTree's web interface; then, open the document's Document Details page.
2. In the Document actions menu, click *Request Assistance* to open the Request Assistance page.
3. Define a subject line and details of your request; then, click *Request Assistance*.

3.2.3.26 Viewing / Starting Workflows

This procedure displays assigned workflows (if any), and starts a workflow on a currently selected document.

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

Pre-requisite:

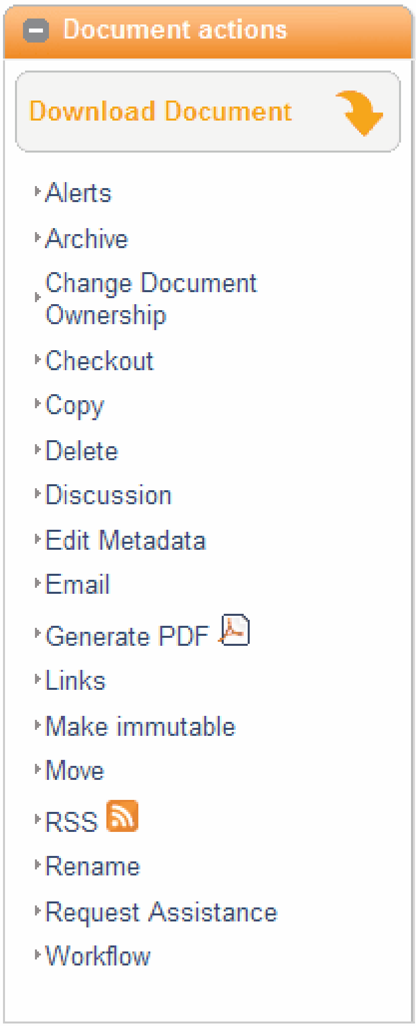
- The document type of the document you're working with must be able to use the workflows added to the system or the workflow option will not display as a document action.

Perform the following steps:

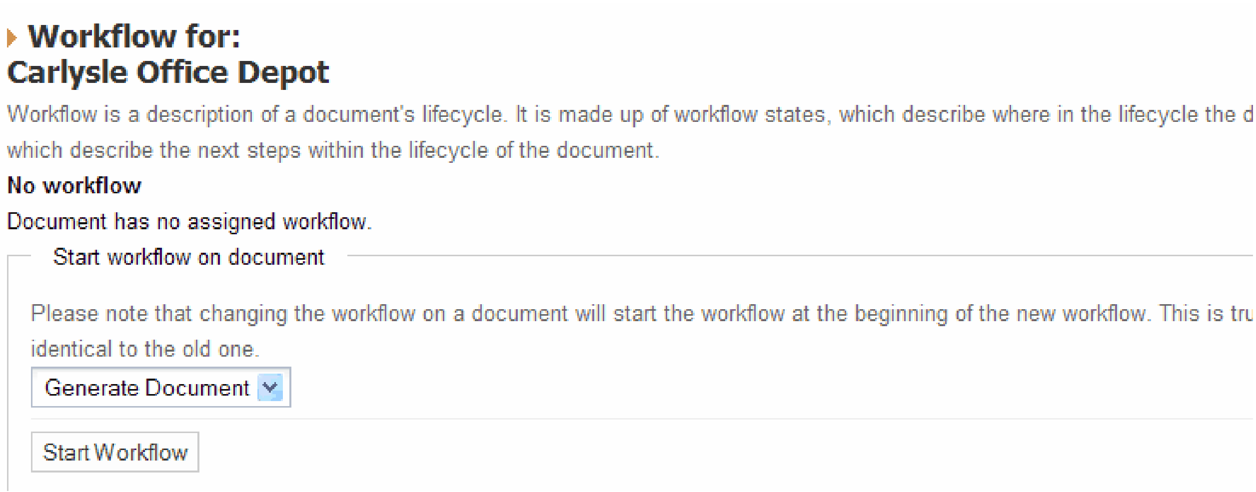
1. Log in to KnowledgeTree's web interface; then, open the Document Details page of the document where you want to view or start a workflow.
2. In the Document actions menu, click *Workflow*.
3. Do you want to ...
   - view a current workflow? View settings for the workflow (if assigned) on the page.
   - perform a transition on the workflow? Select a transition in the Transition to

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

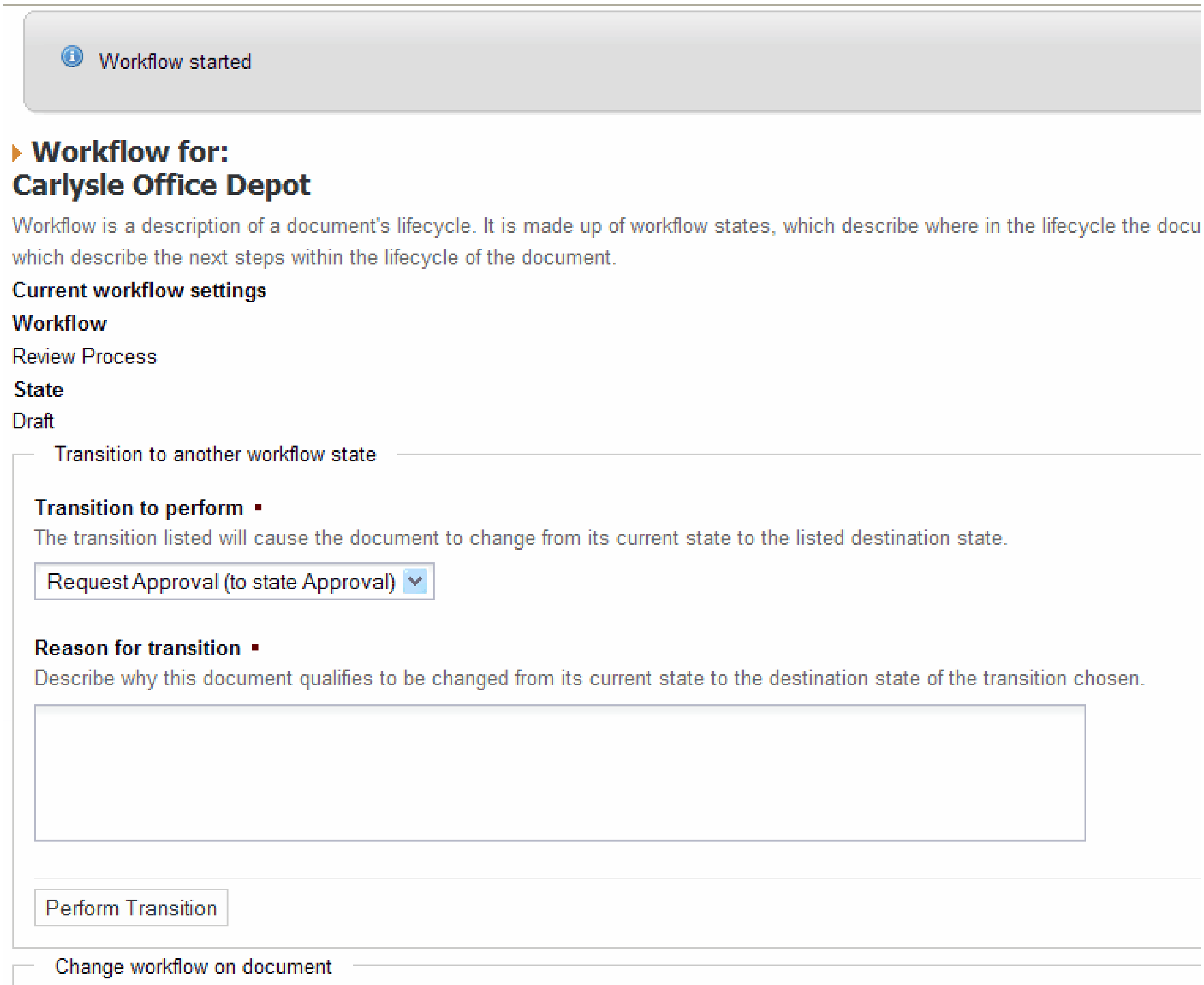
- start a workflow? Select a predefined workflow from the drop down menu; then, click *Start Workflow*.



Workflow document action



Start Workflow



Workflow started

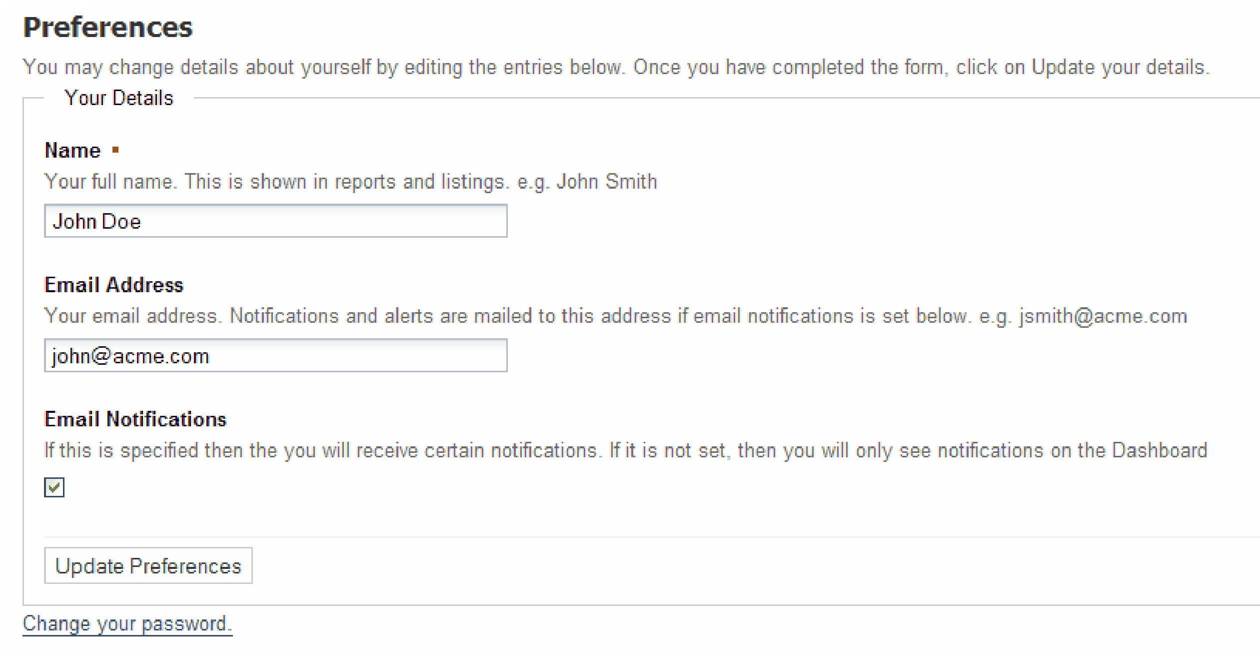
3.3 Preferences

The Preferences page allows you to edit the details of your user account. On the navigation bar, click *Preferences*.

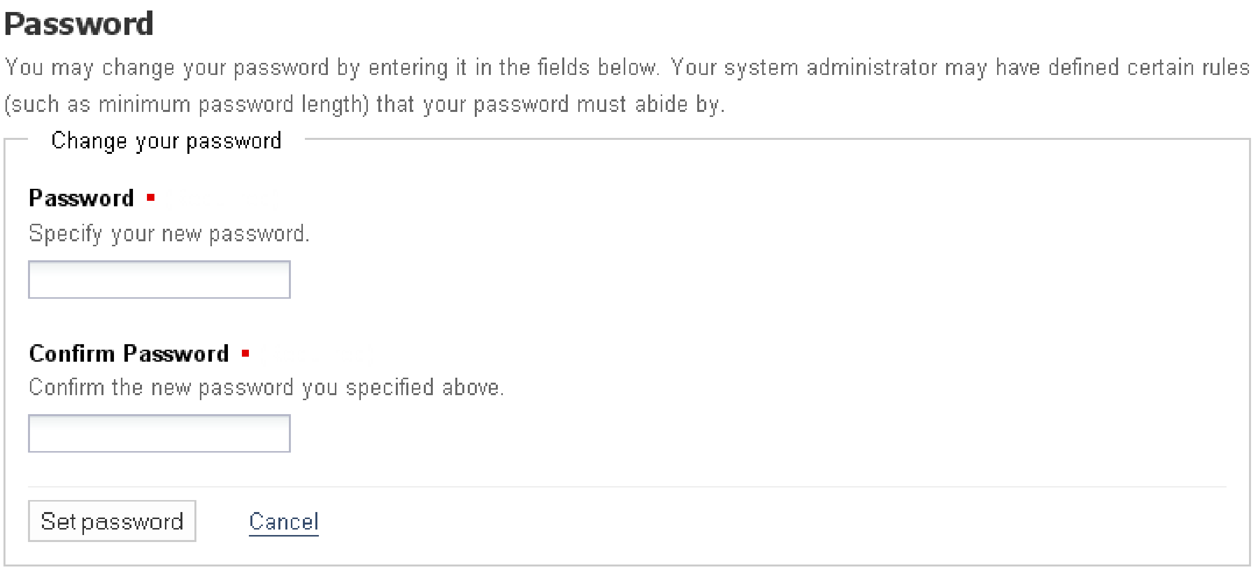
You can view and edit the following information in your personal profile:

- Name - this is used by the system for reports and lists
- Email Address - the system will send alerts and notifications here
- Email Notifications - select this check box if you wish to receive alerts and notifications by email. If this option is not selected notifications will only appear on the Dashboard

Click *Update Preferences* to save your changes.



You can also change your password. Click *Change your password*.



Type your new password in the fields and click *Set password*.

3.3.1 Viewing/Editing User Profile

This procedure displays and edits your user profile.

Perform the following steps:

1. Log in to KnowledgeTree's Web interface; then, click the Preferences tab.

2. Do you want to ...

- change your username? Define a new username in the Name field.

- change your email address? Define a new email address in the Email Address field.

- switch Email Notifications on or off? Select or deselect the Email Notifications check box to define whether or not you will receive notifications and alerts via the email address specified in the previous field.

- change your password? Go to Changing your password.

3. When you're done, click *Update Preferences* to save your changes.

3.3.2 Changing Passwords

This procedure changes the password you use to log in to KnowledgeTree.

Perform the following steps:

1. Log in to KnowledgeTree's Web interface; then, click the Preferences.

2. Click *Change your password* to open the Password page.

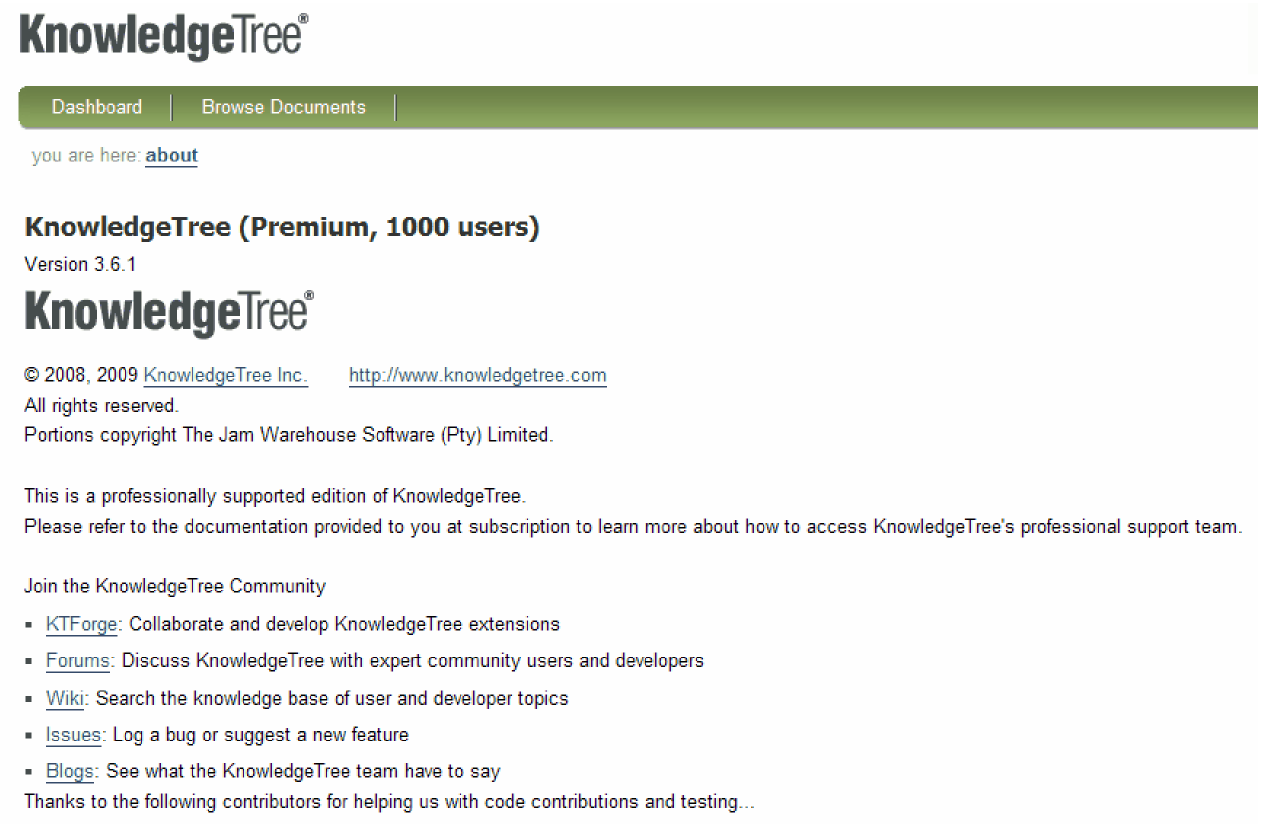
3. Enter your new password in the Password field; then, retype the new password in the Confirm Password field.

4. Click *Set Password*.

3.4 About

The About tab displays the following information:

- Copyright notice
- Community Resources
- A list of the contributors who have contributed code and/or who have helped with testing for the current version
- Logos and links for third party software used in KnowledgeTree



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