

Administrator Manual



KnowledgeTree
Document Management System

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1 Copyright

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<http://www.ktdms.com/>

June 2006

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<http://www.ktdms.com/support>

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2 Preface

The **Jam Warehouse KnowledgeTree™ Administrator Manual** is a comprehensive guide to installing and managing the KnowledgeTree Document Management System. These instructions are intended for use by an experienced system administrator.

Please Note:

These manuals are continually being updated, and we welcome your contributions to help us document KnowledgeTree. Please post your comments and suggestions by creating a 'Documentation' ticket for the KnowledgeTree project on <http://issues.ktdms.com>.

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

3 Typographic Conventions

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

4 Getting Help



Jam Warehouse Software offers various **commercial support** options for licensed users of **KnowledgeTree™ Professional**. Support for **KnowledgeTree Professional** provides you with priority access to our support staff and developers.

Find out more about support and licensing options for **KnowledgeTree Professional** at the KnowledgeTree website -

<http://www.ktdms.com/products/knowledgetree-support>

Getting help for KnowledgeTree Open Source

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

Important

The [KnowledgeTree website](#) provides a variety of links to useful resources for all KnowledgeTree users - Open Source or Professional.

5 Welcome to KnowledgeTree

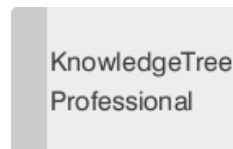
KnowledgeTree™ is a commercial open source Web-based Document Management System.

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

There are two [editions](#) of KnowledgeTree Document Management System:

- [KnowledgeTree Open Source](#) - free to download
- [KnowledgeTree Professional](#) - certified version of the KnowledgeTree Document Management System that extends the functionality of the Open Source edition, and includes a set of tools to provide a familiar Windows® Explorer and Microsoft® Office® interface view of the document repository.

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



Features

KnowledgeTree provides:

- A central document repository with audited document content version control
- Powerful document metadata management and versioning
- Sophisticated document authoring management and workflow
- Full-text indexing technology allowing search within document contents
- Powerful security group and role-based security model and integration with Directory Servers

5.1 Overview

5.1.1 Organizational Hierarchy

KnowledgeTree™ is a goal and task-oriented environment. Users are organized into groups and units, with roles as the key task-drivers.

KnowledgeTree users are organized on two levels:

- **Group level** - a group contains one or more users

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

Groups and **Units** are most directly involved in knowledge processes, and KnowledgeTree allows these groupings to exist in multiple combinations. Different Groups (e.g. Staff, Finance Staff, etc.) may have some **Users** in common, and one or more Groups may be contained in a single Unit.

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

Note: Some default entries are created during installation; you may need to change these before you start using KnowledgeTree.

Workflow tasks are typically assigned to specific **Roles** (e.g. Manager, Editor, etc). Roles are allocated to Groups to transfer the permissions of the Role to the Group.

5.1.2 Administrator Mode

Administrator mode allows system and unit administrators to view and manage all documents in the system, including those documents where they are normally denied access.

Administrators may be denied access to certain documents in the repository – management level documents containing classified information, for example. However, administrators must be granted a way of overriding the controls for secure documents in order to fix problems that may occur with these documents.

Enabling / Disabling Administrator Mode

You enable / disable Administrator mode by clicking the link in the **Administrator mode** menu in **Browse Documents**.

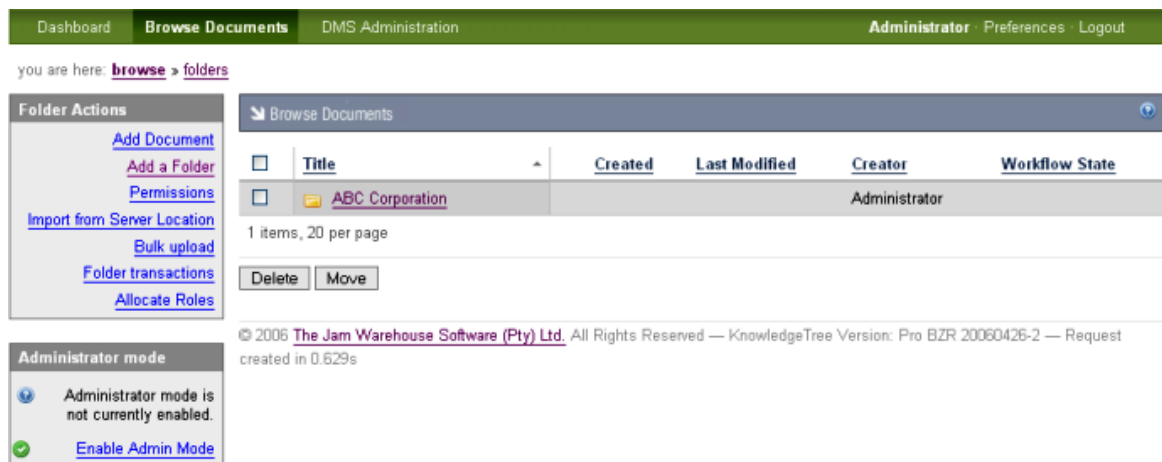


Figure: Administrator mode menu in Browse Documents

5.1.3 Working with Permissions

The KnowledgeTree™ Document Management System repository is secured through permissions.

The system administrator uses the **Security Management** link on the **Administration** menu in **DMS Administration** to create [new permissions](#), or to delete permissions.

Note: Non-administrative users can use the **Permissions** link on the **Folder Actions** menu in **Browse Documents** to view permissions set up for specific folders.

Core Permissions

KnowledgeTree provides the following standard (core) permissions for controlling access to content in the repository.

- **Read** – users are allowed to view the document and its metadata, but they won't be allowed to change it. Search and browse functions do not list a document in search results or in the folder view to users who do not have this permission for that document
- **Write** – users are allowed to change the content of a document, as well as its metadata; check out/check in, or create new documents in folders where they have this permission
- **Add Folder** – users are allowed to create and edit sub folders where they have the required permissions for the parent folder.
- **Manage Permissions** – users are allowed to edit folder permissions
- **Delete** – users are allowed to delete files and sub folders in a parent folder where they have this permission.
- **Manage Workflow** – users are allowed to change the workflow settings on a document (e.g. perform a transition).

Assigning Permissions

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

Folder Permissions

By default, folder permissions are assigned to the creator of a folder, and to the KnowledgeTree administrator.

Permissions that have been granted to the parent folder are applied by default to the sub folders and documents in the parent folder. When a new folder is created, it will always default to the permissions of its parent folder. And any changes to the permissions of the parent folder are passed down to the sub folders.

However, users may be allowed to override the parent permissions, but in this case, when changes are made to the permissions of the parent folder, those changes are no

longer passed down to the sub folder. The parent permissions can also be re-applied at any time, and this will override the custom permissions that may have been defined for the sub folder.

Role-based Permissions

Role-based permissions are a flexible, generalized way of assigning permissions that allow you to assign permissions to the role - e.g. all developers in the organization - and then to add groups - e.g. project team X - to the role. In this way, the permissions of the role are given to one or more groups.

Role-based permissions are useful for workflows; this is because workflows are typically created for the role, and not for the group.

Group-based Permissions

Folder permissions are granted by **group**. Permissions that have been assigned to a specific folder apply to all documents in that folder. When adding a sub folder, permissions for the sub folder are automatically inherited from the parent folder. Permissions for the sub folder can then be modified. However, when permissions for the parent folder change, these changes in the permissions are also passed down to the sub folder.

Click [here](#) to find out more about KnowledgeTree's permissions model.

5.1.4 Manually Restoring the Default Admin Password

A default Admin user (username: *admin*; password: *admin*) is set up during installation to allow initial access to KnowledgeTree.

It is recommended that you change the default admin credentials as soon as your install is complete, after you have obtained access to the DMS in order to change the password. See [Manage Users](#) in the DMS Administration section of this manual for more information about adding / editing passwords.

KnowledgeTree does not have a password resetting system that allows you to retrieve forgotten passwords, but you can restore the default admin credentials.

If you are an administrative user, and you have forgotten your login password, you will need to reset the admin password to 'factory' default by manually modifying the database.

To do this, perform the following steps:

1. Run the following SQL command within MySQL:

```
UPDATE USERS SET password='21232f297a57a5a743894a0e4a801fc3' WHERE id=1;
```

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

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

5.1.5 Login

5.1.5.1 Login Restrictions

The KnowledgeTree™ DMS can be set up to use your organization's central authentication infrastructure to control access to the repository, or it can use its own internal database to allow users to log in.

The authentication process checks and verifies a user's details in order to allow or disallow access to various parts of the DMS, and to enable or disable permissions-based functionality on content in the repository for this user.

You can set up a maximum concurrent sessions a user can have by editing the user's details in the **Users and Groups** section of DMS Administration. This prevents a single account from being used to log into the system from different computers.

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

5.1.5.2 Logging in to the Web-based KnowledgeTree DMS

This procedure logs you in to the KnowledgeTree™ Document Management System.

Perform the following steps:

1. Use your Web-browser to navigate to the **Login** page for the KnowledgeTree Document Management System.
2. Enter your administrative login details in the **Username** and **Password** fields.
Note: Your username and your password are case-sensitive, so you need to ensure that your keyboard **Caps Lock** key is off when entering your login credentials.
Note: If you have forgotten your admin login credentials, see [Manually Restoring the Default Admin Password](#).
4. Click **login** to open the KnowledgeTree at the [Dashboard](#).



Please enter your details below to login.

Username

Password

KnowledgeTree Version: 3.0.0

Figure: Login Page

5.1.5.3 Logging in to KnowledgeTree Explorer




This procedure logs you in to the KnowledgeTree™ Document Management System via KnowledgeTree Integration Server (KTIS), and opens the repository in KnowledgeTree Explorer.

Prerequisites:

- KnowledgeTree Professional installed
- KnowledgeTree Tools installed
- KnowledgeTree Professional license allocated to you
- Valid connection configured with your KnowledgeTree server

Note: See the [Install Guide](#) section in this manual for more information on installing or upgrading to KnowledgeTree Professional. See [Installing KnowledgeTree Tools](#) for information on installing KTtools and configuring connections. See [Adding / Allocating keys](#) to find out how to add a KnowledgeTree Professional license for your username so that you can access KnowledgeTree Explorer.

Perform the following steps:

1. Click  on your desktop; or, click **Start - Programs - KnowledgeTree Tools - KnowledgeTree Explorer** to launch KnowledgeTree Explorer.
2. KnowledgeTree Explorer tests your connection with the KnowledgeTree server.

Trying Carolyn...

3. KnowledgeTree Explorer opens and loads the files and folders in the KnowledgeTree Document Management System repository.

Note: KnowledgeTree Explorer displays the same file and folder hierarchy as in the KnowledgeTree DMS. This is a permissions-based view, as in KT DMS - you will only see the folders and files for which

you have read and/or write permissions in the DMS.

Note: If you have not saved your password for the connection, the KT Connections dialog opens, and you will need to enter your password to connect to KnowledgeTree Explorer.

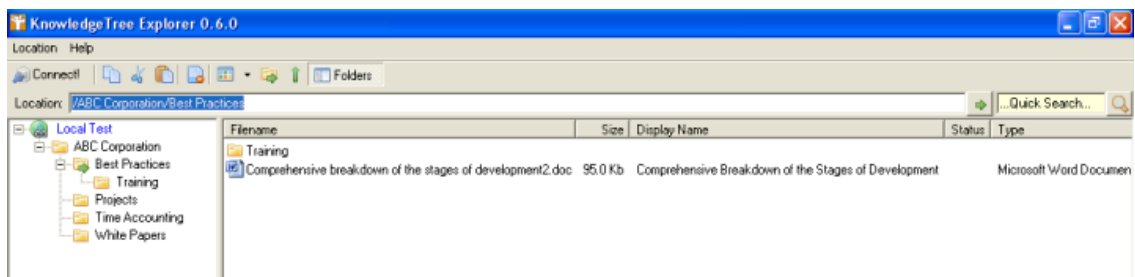


Figure: KnowledgeTree Explorer - files and folders loaded

5.2 KnowledgeTree Editions

There are two editions of KnowledgeTree™ Document Management System:

- [KnowledgeTree Open Source](#) - a free to download, Web-based version of the KnowledgeTree Document Management System.
- [KnowledgeTree Professional](#) - a paid-for version of the Open Source KnowledgeTree Document Management System. KnowledgeTree Professional includes all the features of the Open Source edition, plus a server component (KTIS) and a set of tools (KTtools) that allows you to work with content in the DMS from within a familiar Windows® Explorer and Microsoft® Office® interface called KnowledgeTree Explorer for Windows. KnowledgeTree Professional adds significant functionality to the DMS, and it includes support.

Downloading / Installing KnowledgeTree

KnowledgeTree Document Management System is distributed in two forms:

- 'all-in-one' KnowledgeTree Stack Installer packages for Windows and Linux (Open Source and Professional)
- Source Only ZIP and Tar.GZ packages (Open Source)

Feature Comparison

Feature	KnowledgeTree Open Source	KnowledgeTree Professional
Certified, Tested Server	No	Yes
Web-based DMS	Yes	Yes
KnowledgeTree Integration Server (KTIS)	No	Yes
KnowledgeTree Explorer for Windows	No	Yes
KnowledgeTree Office Integration	No	Yes
Extended Management Reporting Functionality	No	Yes
Distributed as Optimized Bytecode	No	Yes
Support	No	Yes.
Annual Subscription Fee	Free	Yes

Note: See the KnowledgeTree website for more information about [support options](#) and [subscription](#) costs for KnowledgeTree Professional.

5.2.1 What is KnowledgeTree Open Source?

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


Because it's open source, the product can be downloaded and installed at no cost. This is useful where you need to evaluate document management solutions for your organization, or if you are interested in customizing core features of the system.

Additionally, since KnowledgeTree Open Source is focused on document management (and not on Web portal and content publishing) - and it comes with no price tag - it is easier for most organizations to implement than expensive, proprietary content management applications.

KnowledgeTree Open Source is suitable in many document and records management scenarios.

Note: A **Professional** edition of the KnowledgeTree Document Management System is also available. Click [here](#) to find out more about **KnowledgeTree Professional** at the KnowledgeTree website, or go to [What is KnowledgeTree Professional?](#)

5.2.2 What is KnowledgeTree Professional?

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

Windows and Office users can access and work with content in the document repository from their desktop, and from within Microsoft Office applications. The system allows you to drag & drop files from your desktop, and to open and check-in documents from within Microsoft Word, Excel and PowerPoint. You can also manage metadata, versions, and workflow from the Windows desktop.

KnowledgeTree Professional ships with a server-side component called the **KnowledgeTree Integration Server (KTIS)**, and includes a set of **KnowledgeTree Tools for Windows (KTtools)**.

KTtools contains:

- **KnowledgeTree Explorer for Windows:** an Explorer-type application that provides a file browser view of the document repository (see Figure below)
- **KnowledgeTree Office Add-in:** a Microsoft Office add-in that allows you to access KnowledgeTree functionality from within Microsoft Office applications.
- **KnowledgeTree Desktop Imaging:** a tool that allows you to scan documents into the KnowledgeTree repository.

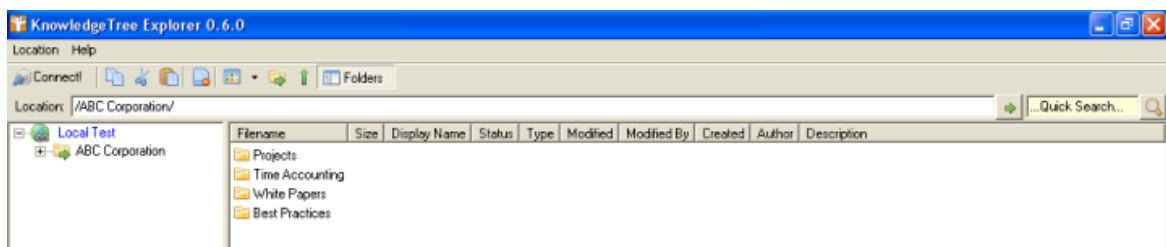


Figure: KnowledgeTree Explorer for Windows

Features

KnowledgeTree Professional includes functionality beyond that available in **KnowledgeTree Open Source**. Some of this functionality is available through the web front-end, but much of it is built into a set of **Windows Tools (KTtools)**.

The KnowledgeTree Professional feature set includes:

- a central document repository with audited document content version control
- document metadata management and versioning

- document authoring management and workflow
- full-text indexing, allowing search within document contents
- security group and role-based security model and integration with Directory Servers
- stack installers that install and configure all required stack and indexing components, including certified versions of Apache, MySQL and PHP
- KnowledgeTree Integration Server (KTIS) and KnowledgeTree Client Tools for Windows (KTtools)
- extended management reporting functionality
- 2 business day priority support via our online Customer Portal

Note: KnowledgeTree Professional is available for purchase from the KnowledgeTree website at <http://www.ktdms.com/>

5.2.2.1 KnowledgeTree Integration Server (KTIS)



KnowledgeTree™ Integration Server (KTIS) is a component that provides a standards-based WebDAV interface into the KnowledgeTree Document Management System. The KnowledgeTree Integration Server is complemented by [KnowledgeTree Tools \(KTtools\)](#) - a set of client tools for Windows - plus a number of plug-in products that extend the utility of the server for specific tasks.

Using KnowledgeTree Integration Server

KnowledgeTree Professional licence holders are able to log in to KnowledgeTree Document Management System through **KTIS**. This allows you to work with content in the repository within KnowledgeTree Explorer, using **KnowledgeTree Client Tools for Windows (KTtools)**.

Note: Go to [Adding / Allocating Keys](#) to find out more about issuing licenses for KnowledgeTree Professional.

5.2.2.1.1 3rd Party WebDAV Clients

At the time of writing (June 2006), [KnowledgeTree Explorer for Windows](#) is the only **native** client for KnowledgeTree Integration Server.

Access is also provided to the following **3rd Party WebDAV** clients (with varying degrees of functionality):

-
- **Windows XP Explorer WebDAV**
 - **Mac OS X Finder**
 - **KDE Konqueror**
 - **Novel NetDrive**
 - **cadaver**

Important

- 3rd Party WebDAV clients are limited to **read-only** mode in the **default** installation. To enable **write** mode you need to edit the **baobab.conf** file in your KnowledgeTree **var** folder and turn *off* **SafeMode**. The file is created the first time you access KTIS.

- **Windows users - Web Folders Update**

Windows users who want to use Windows Explorer WebDAV *must* install the Web folders update, available at <http://support.microsoft.com/?kbid=892211>.

Note: Authentication under Windows XP requires that you append the port to the hostname - e.g.

<http://www.hostname.com:80/kt3/baobab/>

3rd Party Client Functionality

We are constantly extending the functionality of 3rd Party Clients for KnowledgeTree Integration Server and KTtools, please click [here](#) to view the latest information for your scenario.

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

5.2.2.2 KnowledgeTree Client Tools for Windows



KnowledgeTree™ Client Tools for Windows (KTtools) are a set of client-side tools that leverage the functionality of the **KnowledgeTree Integration Server (KTIS)** to provide alternate methods of working with the KnowledgeTree server.

Note: Only **KnowledgeTree Professional** users with valid licenses have access to **KTtools** via **KTIS**. **KnowledgeTree Professional** is available for purchase from the **KnowledgeTree website** at <http://www.ktdms.com/>


The KTtools toolset comprises:

- [KnowledgeTree Explorer for Windows](#)
- [KnowledgeTree Office Add-in for Microsoft Office](#)
- [KnowledgeTree Desktop Imaging](#)

You can download these tools from the KnowledgeTree website and install them on your client machines.

For more information about using **KTtools**, go to [Using KnowledgeTree Client Tools for Windows](#), see the KnowledgeTree User Manual, or find out more at the [KnowledgeTree website](#).

5.2.2.2.1 KnowledgeTree Explorer for Windows

 **KnowledgeTree Explorer for Windows** is a component of **KnowledgeTree Client Tools for Windows** (KTtools) that provides a familiar Windows® Explorer and Microsoft® Office® view of the KnowledgeTree Document Management System repository.

KnowledgeTree Professional allows you to use KnowledgeTree Explorer and Windows Explorer to open files in the KnowledgeTree repository from your desktop, while retaining the functionality of workflows, version control, and metadata. You can also use your operating system's 'drag and drop' functionality to copy files or folder trees in and out of the repository.

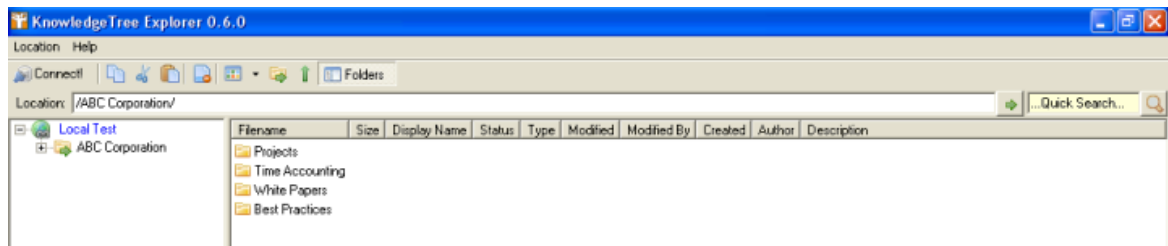
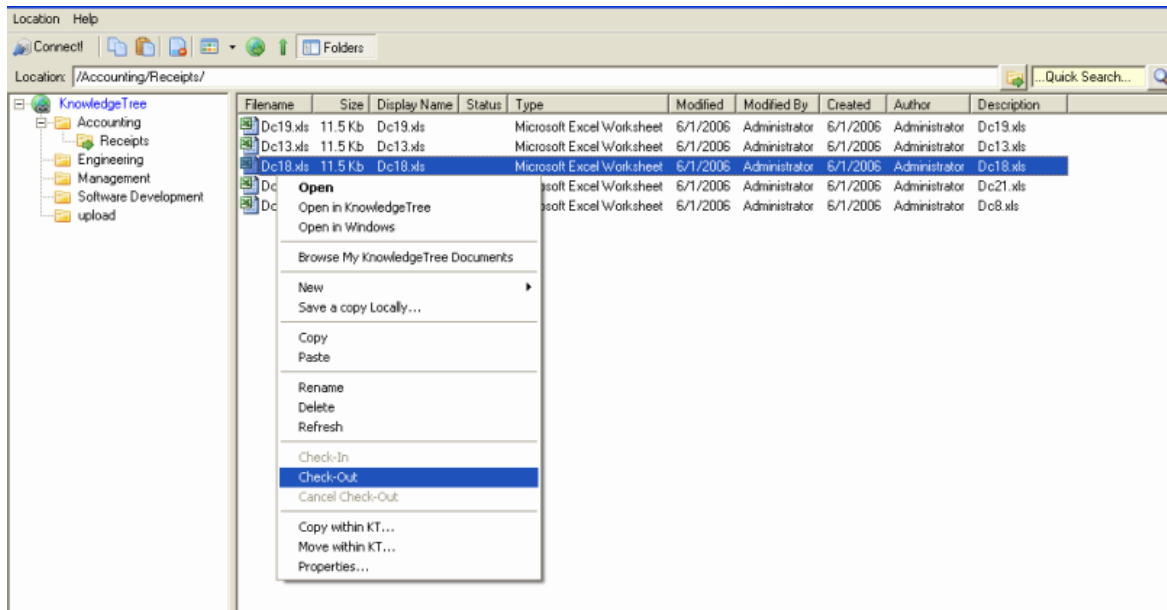


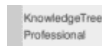
Figure: KnowledgeTree Explorer for Windows Interface

5.2.2.2.2 KnowledgeTree Office Add-in for Microsoft Office

The Office Toolbar plugin allows you to browse, check-out and check-in documents in the KnowledgeTree Document Management System repository from within Microsoft Office XP/2003 applications.



5.2.2.2.3 KnowledgeTree Desktop Imaging

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

For more information on using KnowledgeTree Desktop Imaging, see **Scanning Images with KnowledgeTree Desktop Imaging** in the KnowledgeTree User Manual.

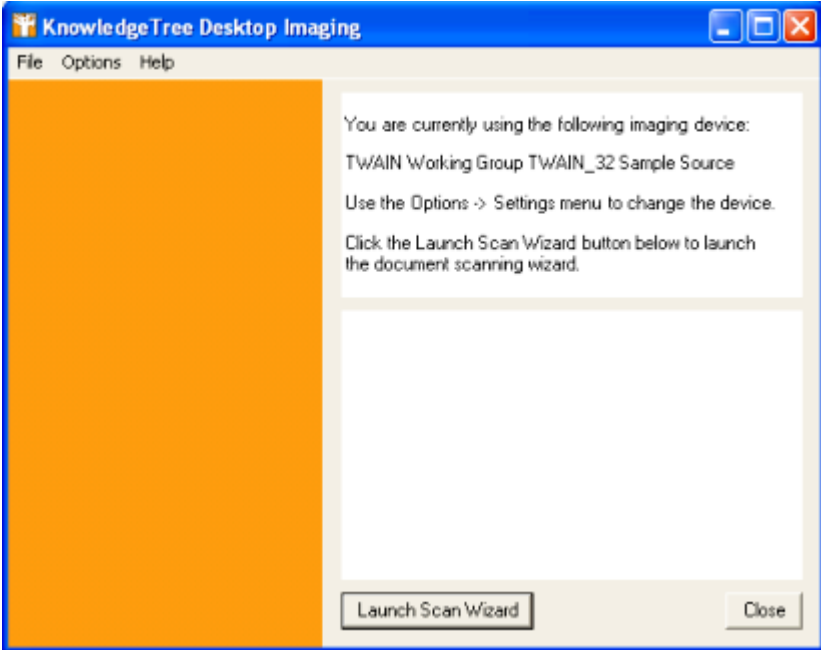


Figure: KnowledgeTree Desktop Imaging Scan Wizard

6 Install Guide

Important

KnowledgeTree™ is capable of running on a large number of operating systems, and in many different configuration scenarios. We do not provide instructions for all of the potential implementation environments. This guide explains how to use the KnowledgeTree Stack Installers for Windows / Linux, and it provides instructions for manually installing KnowledgeTree on generic Windows and Unix-like operating systems.

If you don't find the installation instruction for your environment in this guide, please check the KnowledgeTree Wiki at <http://issues.ktdms.com/confluence/>, where we have collected several more specific sets of installation instructions with the help of the KnowledgeTree community.

If you have successfully implemented KnowledgeTree on a platform that is not detailed on the KnowledgeTree Community Wiki, we would welcome your contribution of installation instructions. Please feel free to create a Wiki account for yourself and to post your wisdom!

6.1 Supported Platforms

KnowledgeTree can be installed to the following platforms:

- Red Hat Enterprise Server 3 and 4 (32-bit x86)
- Fedora Core 4 (32-bit x86)
- SUSE 9 and 10 (32-bit x86)
- Ubuntu 6.06 (32-bit x86)
- Windows Server 2003
- Windows XP SP2

KnowledgeTree Professional also requires the following applications on the client-side:

- Microsoft Windows XP Service Pack 2
 - Microsoft Office XP
 - Microsoft Office 2003

6.2 Upgrading

This section describes upgrades for the following scenarios:

If you have and you want to upgrade to then use
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KnowledgeTree Open Source (Stack Installed)	the latest version of KnowledgeTree Open Source (Stack Installed)	KnowledgeTree Open Source Upgrade Installer (Windows / Linux) See Upgrading KnowledgeTree OSS (Stack Installed) to latest version OSS (Stack Installed)
	KnowledgeTree Professional	KnowledgeTree Professional Upgrade Installer (Windows / Linux) See Upgrading KnowledgeTree OSS (Stack Installed) to latest version KnowledgeTree Professional
KnowledgeTree Open Source (OSS) - manually installed	KnowledgeTree Professional	KnowledgeTree Professional Stack Installer; then, follow upgrade instructions on the KnowledgeTree website. See Upgrading KnowledgeTree OSS (manually installed) to KnowledgeTree Professional
	KnowledgeTree Open Source - stack installed	KnowledgeTree Open Source Stack Installer; then, follow upgrade instructions on the KnowledgeTree website. See Upgrading KnowledgeTree OSS (manually installed) to KnowledgeTree OSS (Stack Installed)
	KnowledgeTree Open Source - manually installed - latest version	Latest version of the Source Only package; then, follow instructions in upgrade.txt in docs directory See Upgrading from KnowledgeTree OSS (manually installed) to latest version OSS (manual install - Source Only Package)

KnowledgeTree Professional	KnowledgeTree Professional - latest version	KnowledgeTree Professional Upgrade Installer See Upgrading KnowledgeTree Professional to latest version KnowledgeTree Professional
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Note: KnowledgeTree Stack Installers install Apache and MySQL, so we do not recommend that you install the Stack Installers on servers that have Apache and MySQL unless you have MySQL and Apache administration experience.

6.2.1 Backing up before Upgrading

You must **back up** your KnowledgeTree Document Management System before performing any upgrades.

You need to back up the following components:

- the database
- the documents
- the configuration
- the application

Backing up the Database

The mysqldump (included with all the Stack Installers) or phpMyAdmin programs can be used to export the database into a SQL file. Ensure that you disable foreign key checks in the export. The default database name is dms. Back up this exported file.

See Also

- Database Backup for [Microsoft Windows](#) users
- Database Backup for [Linux](#) users

Backing up the Documents

The documents are stored in the Documents directory in KnowledgeTree. In the KnowledgeTree Stack (which bundles KnowledgeTree with all associated programs), this directory is in the root of the KnowledgeTree stack install. In the open source standalone install, this defaults to the var/Documents directory (but should be changed). Use any filesystem backup system to back this up.

Backing up the Configuration

The configuration resides in the config.ini file. In the KnowledgeTree Stack, this lives in the root of the stack install root. In the open source standalone install, this defaults to the config/config.ini file.

Backing up the Application

Even though this can be reinstalled from the original installation material, keeping the

application backed up improves restore-time, and makes it possible to restore if you have lost the original installation material. Use any filesystem backup system to back this up.

6.2.1.1 Database Backup for Microsoft Windows

This procedure saves your database (Windows users) to a file - e.g. dump.sql.

Perform the following steps:

1. Click **Start - Run**.
2. Type `cmd` in the Run dialog box.
3. Navigate to the following location: **KnowledgeTree_Directory\mysql\bin**
4. Enter the following command: `mysqldump -u dmsadmin -p dms > dump.sql`
5. When you're prompted for a password, enter the MySQL password you set up during your KnowledgeTree installation.
6. The database is saved to **dump.sql**. Ensure that you keep this file in a safe place.

See Also

[Database Restore for Microsoft Windows](#)

6.2.1.2 Database Backup for Linux

This procedure saves your database (Linux users) to a file - e.g. dump.sql.

Perform the following steps:

1. Open a terminal.
2. Navigate to **KnowledgeTree_Directory\mysql\bin**
3. Enter the following command: `./mysqldump -s KnowledgeTree_Directory/mysql/bin/mysqldump --port=3306 --socket=KnowledgeTree_Directory/mysql/tmp/mysql.sock -u dmsadmin -p dms > dump.sql`
4. When you're prompted for a password, enter the MySQL password you set during your KnowledgeTree installation.
5. The database is saved to **dump.sql**. Ensure that you keep this file in a safe place.

See also

[Database Restore for Linux](#)

6.2.2 Restoring after Upgrading

This section provides information for on restoring KnowledgeTree Document Management System components that you backed up before performing an upgrade.

Note: We recommend that you perform a [backup](#) of KnowledgeTree **prior** to any upgrade.

Documents, Configuration, and the Application

Restore from the filesystem backup system that these were backed up to.

Database

Use the mysql or phpMyAdmin programs to read in the exported SQL file.

Note: See also the specific instruction on database backup and restore for Windows and for Linux users.

6.2.2.1 Database Restore for Microsoft Windows

This procedure restores your database (Windows users) from a file - e.g. dump.sql.

Note: *dump.sql* must be in the following directory: `KnowledgeTree_Directory\mysql\bin`

Perform the following steps:

1. Click **Start - Run**.
2. Type `cmd` in the Run dialog box.
3. Navigate to **KnowledgeTree_Directory\mysql\bin**
4. Enter the following command: `mysql.exe -u dmsadmin -p dms < dump.sql`
5. When you're prompted for a password, enter the MySQL password you provided during your KnowledgeTree installation.

6.2.2.2 Database Restore for Linux

This procedure restores your database (Linux users) from a file - e.g. dump.sql.

Perform the following steps:

1. Open a terminal.
2. Navigate to the following location: **KnowledgeTree_Directory\mysql\bin**
3. Enter the following command: `./mysqldump -s`

```
KnowledgeTree_Directory/mysql/bin/mysqldump --port=3306 --socket=
KnowledgeTree_Directory /mysql/tmp/mysql.sock -u dmsadmin -p dms <
dump.sql
```

- When you're prompted for a password, enter the MySQL password you provided during your KnowledgeTree installation.

6.2.3 Upgrade Instructions





6.2.3.1 Scenarios for Upgrade Installs

KnowledgeTree provides a variety of **Stack Installers** - available for Windows or Linux - to install **KnowledgeTree Open Source** or **KnowledgeTree Professional** in a few easy steps.

Note: KnowledgeTree Open Source products are free to download at the KnowledgeTree website. KnowledgeTree Professional products are available for purchase at the KnowledgeTree website. Click [here](#) for more information.

Important Information for Upgrades:

You must [back up](#) your existing KnowledgeTree Document Management System before attempting any upgrade.

	Windows	Linux
Stack Installers	KnowledgeTree Open Source Windows Installer (3.*.*) - stack installer	KnowledgeTree Open Source Linux Installer (3.*.*) - stack installer
	 KnowledgeTree Professional Windows Installer (1.*.*) - stack installer	 KnowledgeTree Professional Linux Installer (1.*.*) - stack installer
Upgrade Installers	KnowledgeTree Open Source Windows Upgrade Installer (3.*.*)	KnowledgeTree Open Source Linux Upgrade Installer (3.*.*)
	 KnowledgeTree Professional Windows Upgrade Installer (1.*.*)	 KnowledgeTree Professional Linux Upgrade Installer (1.*.*)

Note: At the time of writing (June 2006), KnowledgeTree Open Source is at version 3.0.3, and KnowledgeTree Professional is at version 1.0.1)

Note: KnowledgeTree Stack Installers install Apache and MySQL, so we do **not** recommend that you install the Stack Installers on servers that have Apache and MySQL unless you have MySQL and Apache administration experience.

Using the Installers

If your current situation is ...	And you want to install ...	Then use ...
<p>No existing installations of KnowledgeTree – Open Source or Professional</p>	<p>1. KnowledgeTree Professional</p>	<p>KnowledgeTree Professional Stack Installer</p> <p>See Installing KnowledgeTree Professional using the Stack Installer for Windows / Linux</p>
	<p>2. KnowledgeTree Open Source (Stack Install)</p>	<p>KnowledgeTree Open Source Stack Installer</p> <p>See New Install - Installing KnowledgeTree Open Source using the Stack Installer for Windows / Linux</p>
	<p>3. KnowledgeTree Open Source (Manual install)</p>	<p>Source Only Package</p> <p>Note: You download the Source Only package from the KnowledgeTree website. It contains all the Source Only files</p> <p>See New Install - Installing KnowledgeTree Open Source using the Source Only Package for Windows / Linux</p>
<p>KnowledgeTree Open Source – Stack installed</p> <p>Note: This scenario applies where you have previously used the KnowledgeTree Open Source Stack Installer to install KnowledgeTree Open Source.</p>	<p>1. The latest version of KnowledgeTree Open Source (i.e. upgrade)</p>	<p>KnowledgeTree Open Source Upgrade Installer</p> <p>See Upgrading KnowledgeTree OSS (Stack Installed) to latest version OSS (Stack Installed)</p>
	<p>2. KnowledgeTree Professional (i.e. upgrade)</p>	<p>KnowledgeTree Professional Upgrade Installer</p> <p>See Upgrading KnowledgeTree OSS (Stack Installed) to KnowledgeTree Professional</p>

KnowledgeTree Open Source – Manually installed	1. KnowledgeTree Professional	<p>KnowledgeTree Professional Stack Installer and Upgrade instructions on the KnowledgeTree website</p> <p>Note: First run the installer; then, follow the upgrade instructions on the website.</p> <p>See Upgrading KnowledgeTree OSS (manually installed) to KnowledgeTree Professional</p>
	2. KnowledgeTree Open Source – Stack installed	<p>KnowledgeTree Open Source Stack Installer and follow instructions on the KnowledgeTree website</p> <p>Note: First run the installer; then, follow the upgrade instructions on the website.</p> <p>See Upgrading KnowledgeTree OSS (manually installed) to KnowledgeTree OSS (Stack Installed)</p>
	3. Latest version of KnowledgeTree Open Source – Manual install	<p>Latest version of Source Only Package and follow instructions in upgrade.txt in docs directory</p> <p>Note: You download the Source Only package from the KnowledgeTree website. Then you follow the instructions.</p> <p>See Upgrading KnowledgeTree OSS (manually installed) to latest version OSS (manual install - Source Only Package)</p>

KnowledgeTree Professional	KnowledgeTree Professional – latest version	KnowledgeTree Professional Upgrade Installer See Upgrading KnowledgeTree Professional to latest version KnowledgeTree Professional
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6.2.3.2 Upgrading KnowledgeTree OSS (Stack Installed) to KnowledgeTree Professional

This procedure upgrades your existing, stack installed, KnowledgeTree Open Source installation to KnowledgeTree Professional, using the **KnowledgeTree Professional Upgrade Installer** for **Windows** / Linux.

Note: This procedure assumes that your current KnowledgeTree Open Source installation was installed using the Open Source Stack Installer for Windows / Linux.

****Note:** This procedure describes the steps involved when using the **Professional Upgrade Installer for Windows**. The Professional Upgrade Installer for Linux differs in a few minor ways.

Prerequisites:

- You need to have performed a [backup](#) of your KnowledgeTree Document Management System before upgrading.

Perform the following steps:

1. Have you backed up your installation of KnowledgeTree Document Management System?

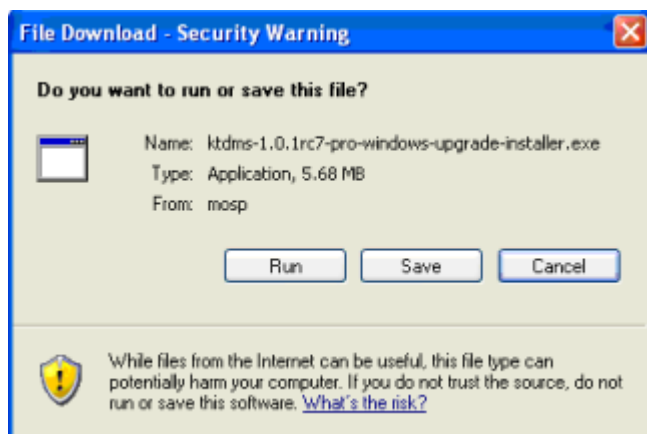
- **Yes.** Go to step 2.
- **No.** Backup your system before continuing with this upgrade.

2. Locate, then click on the latest version **KnowledgeTree Professional Upgrade Installer for Windows**.

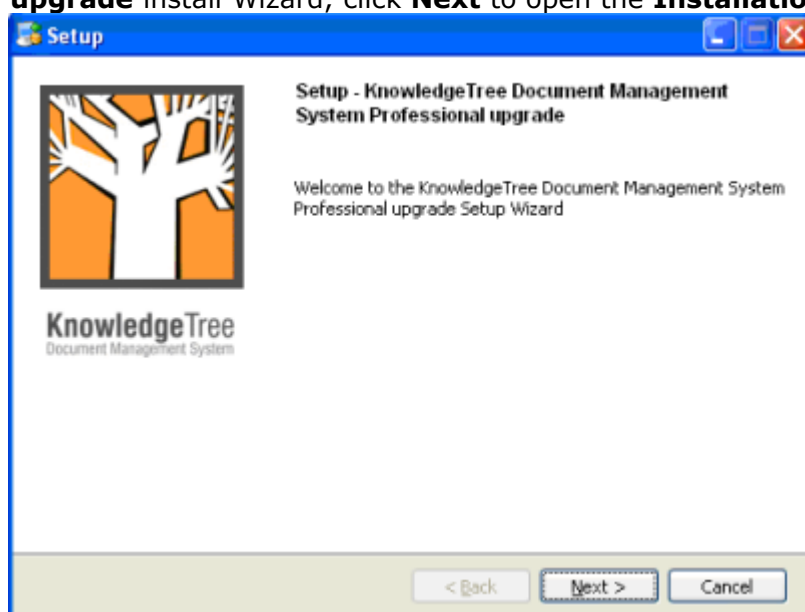
Note: If you're upgrading to KnowledgeTree Professional in a Linux environment, select the latest version KnowledgeTree Professional Upgrade Installer for Linux.

3. On the **File Download - Security Warning** page, decide whether you want to save the upgrade installer to your local computer to run the install from there, or click **Run** to open the **Professional Upgrade Wizard**.

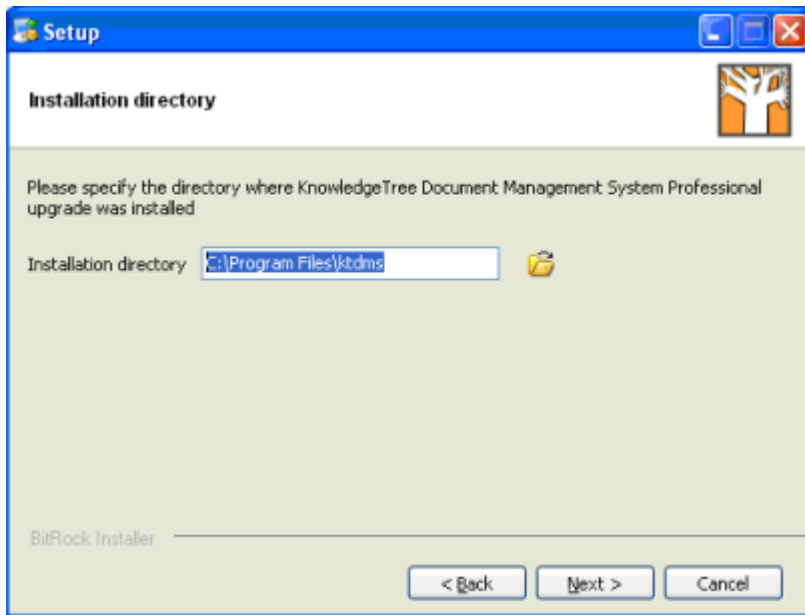
Note: When starting the upgrade installer, you may see a browser security warning that the publisher cannot be verified. Click **Run** to continue.



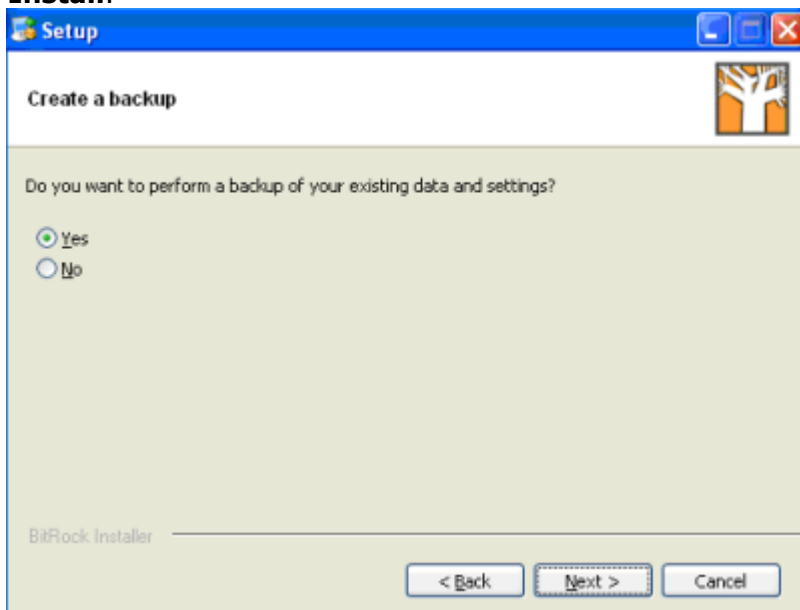
4. On **Setup - KnowledgeTree Document Management System Professional upgrade** install Wizard, click **Next** to open the **Installation directory** page.



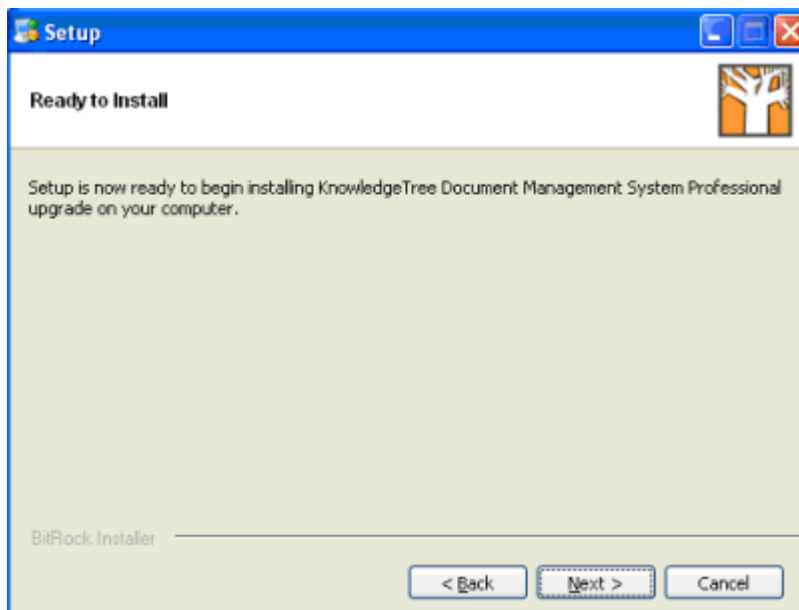
5. Accept the default install location, or click the browse icon to select a different install location; then, click **Next** to open the **Create a backup** page.



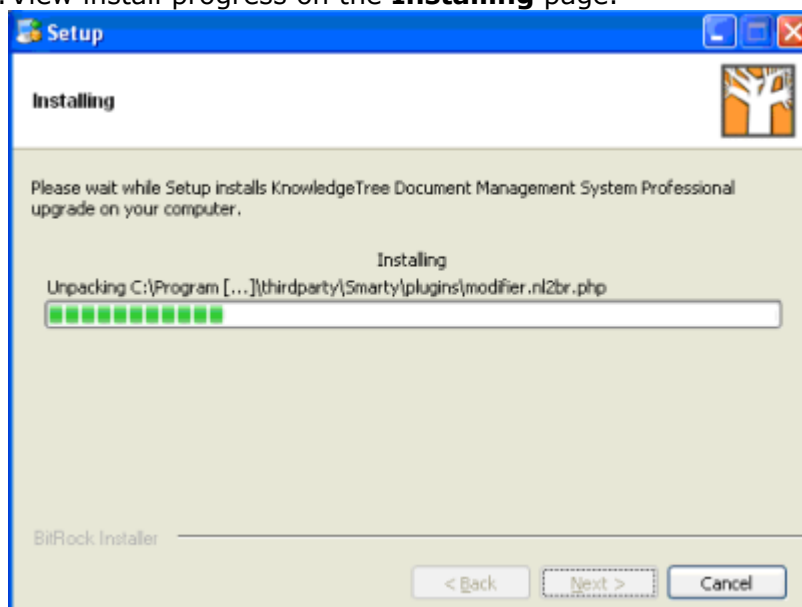
6. Ensure that the **Yes** radio button is selected; then, click **Next** to open **Ready to Install**.



7. Click **Next** to start the installation.



8. View install progress on the **Installing** page.



9. When the installation is complete, click **Finish** on **Completing the KnowledgeTree Document Management System Professional upgrade Setup Wizard**.



10. Perform the following tasks to complete the upgrade from KnowledgeTree Open Source to KnowledgeTree Professional:
 - 10.1. [Configure SSL](#) for the Apache Server in the KnowledgeTree Stack.
Note: *This is an optional task, which is only required if you want to enable SSL for your environment.*
 - 10.2. [Install KTtools](#).
 - 10.3. Log in to KnowledgeTree to [allocate license keys](#).
 - 10.4. [Configure a connection with KnowledgeTree Explorer](#).
Note: *You should only be required to configure the connection where you are performing a new install of KnowledgeTree Professional Explorer and KnowledgeTree Tools (KTtools). Typically, the upgrade installer saves the information from the previous connection you configured and does not remove it during upgrade.*
 - 10.5. [Re-read the plugins](#) list on the **Plugins** page of the [Miscellaneous](#) section in **DMS Administration**.

6.2.3.3 Upgrading KnowledgeTree OSS (manually installed) to KnowledgeTree Professional

This procedure **upgrades** your *manually installed KnowledgeTree Open Source* installation to the latest version of **KnowledgeTree Professional**.

Note: *These instructions document the use of the **Professional Stack Installer for Windows**. The Professional Stack Installer for **Linux** differs in a few minor ways.*

Prerequisites:

- You need to have performed a [backup](#) of your KnowledgeTree Document Management System before upgrading.
- You must have performed a *manual* upgrade to the latest version of KnowledgeTree Open Source before running the Professional Stack Installer. Click [here](#) to download the latest Source Only package for Windows / Linux at the KnowledgeTree website; then, follow the instructions in Upgrade.txt, located in the Docs directory of the Source Only package.

Note: KnowledgeTree **Source Only** Packages contain the KnowledgeTree application and installation instructions. Please be aware that you will need to be familiar with installing and configuring all required components.

Perform the following steps:

1. Have you backed up your current installation?

- **Yes.** Go to step 2.
- **No.** Please perform a [backup](#) of your KnowledgeTree Document Management System before continuing with this upgrade.

2. Have you manually upgraded your manually installed KnowledgeTree Open Source installation to the latest version of KnowledgeTree Open Source, using the Source Only package for Windows / Linux?

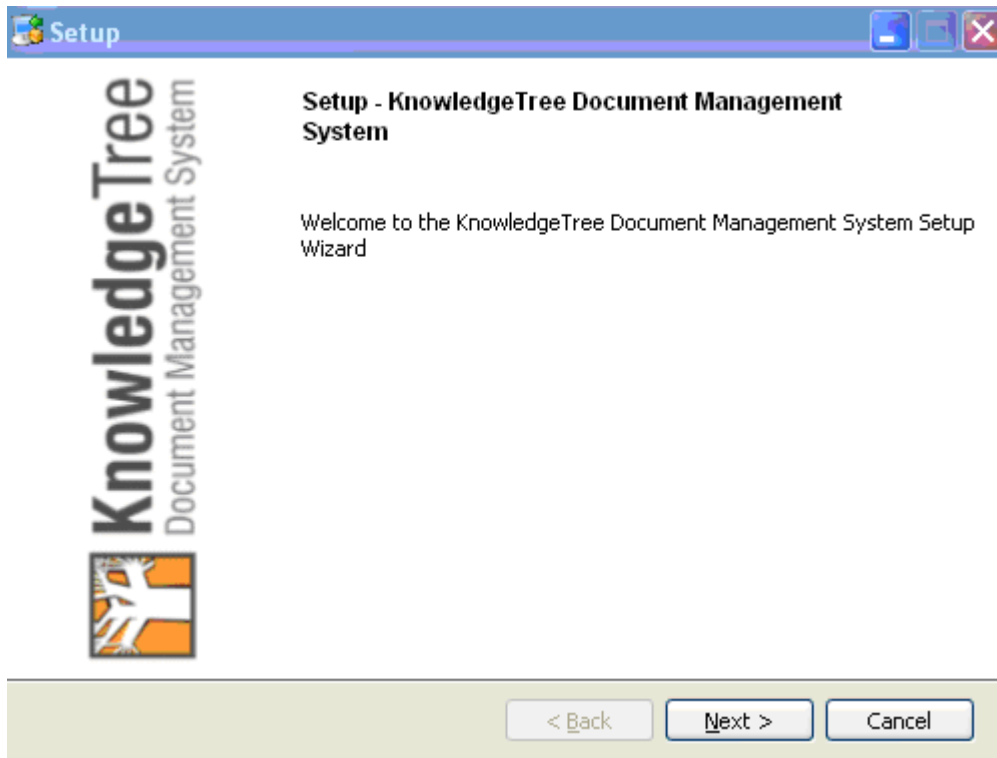
- **Yes.** Go to step 3.
- **No.** Ensure that you have backed up your system; then, click [here](#) to download the latest Source Only package for KnowledgeTree Open Source before continuing with this procedure.

Note: KnowledgeTree **Source Only** Packages contain the KnowledgeTree application and installation instructions. Please be aware that you will need to be familiar with installing and configuring all required components.

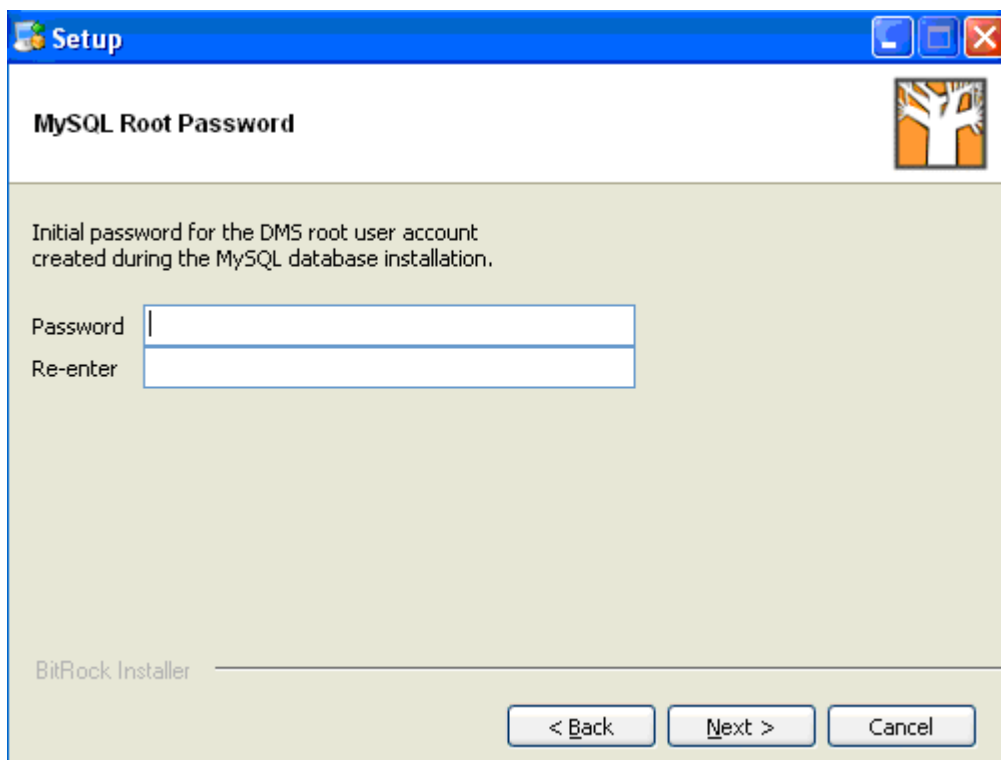
3. Download and run the **KnowledgeTree Professional Stack Installer for Windows / Linux** at the [KnowledgeTree website](#).

4. On the **File Download** dialog box, click **Save**.

5. Read the **Security Warning**; then, click **Run** to launch the **KnowledgeTree Setup Wizard**.



5. Click **Next** to open the **License Agreement**. Accept the agreement; then, click **Next** to open the **Installation Directory** page of the Setup Wizard.
6. Accept the default install location, or browse to select an alternate directory. When you're done, click **Next** to open the **MySQL Root Password** page.

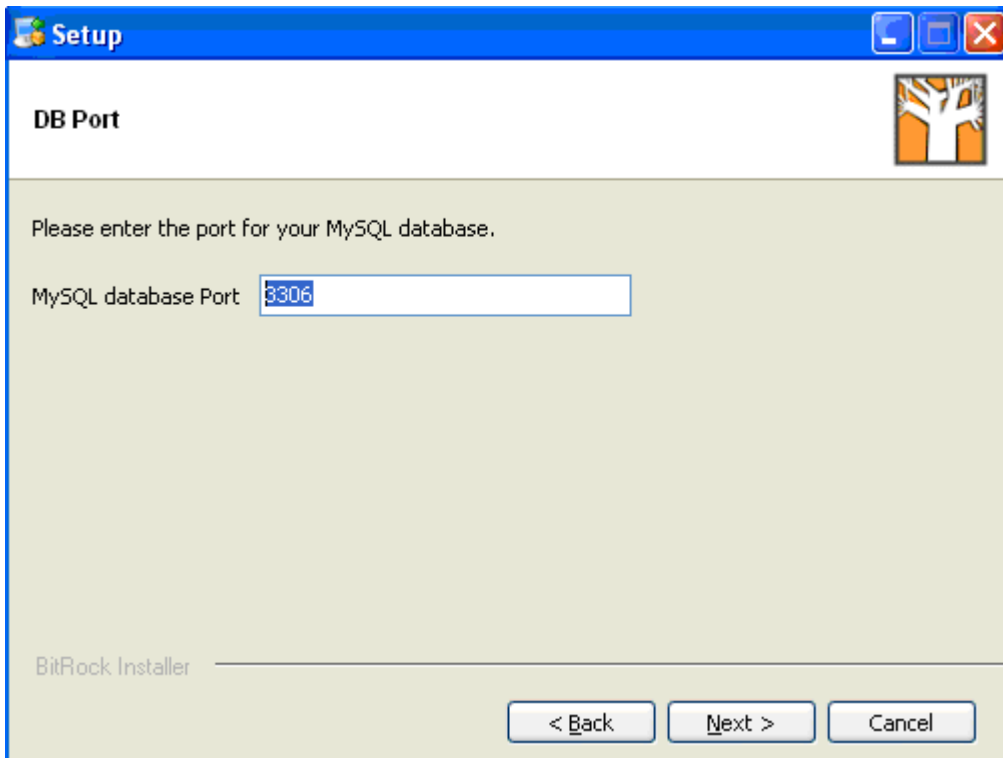


7. Enter the DMS root user account password; then, click **Next** to open the **MySQL User Password** page.

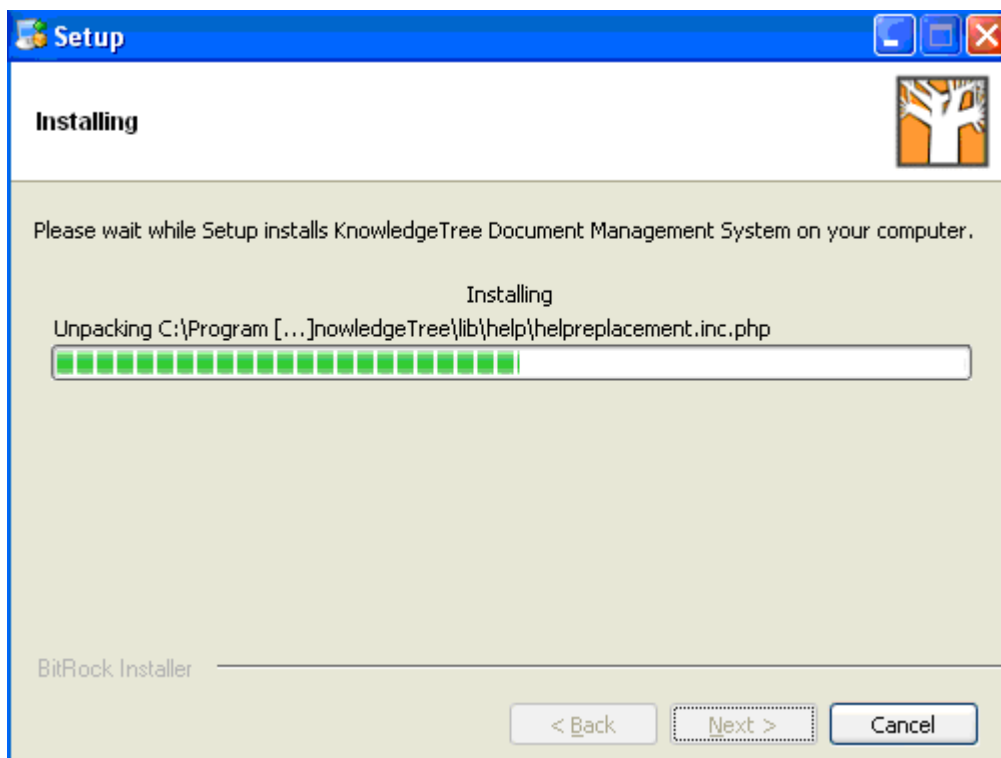
Note: The passwords you define during the installation are used for accessing the MySQL database. The final login username and password is still 'admin/admin'.

8. Enter a password on the **MySQL User Password** page; then, click **Next** to open the **DB Port** page.

Note: If the Installer can't use the standard ports - port 3306 for MySQL, port 8080 for Apache - it displays a system message informing you that it can't bind to the port. In this case, you will need to define a new port - e.g. port 3333.



9. Enter the port for your MySQL database on the **DB Port** page; then, click **Next** to open the **WebServer Port** page.
10. Enter the Apache Web server port; then, click **Next** to open the **Install as a service** page.
11. Read the instruction on this page to decide whether or not to register KnowledgeTree as a service; then, select either **Yes** or **No**. Click **Next** to open the **Ready to Install** page.
12. Click **Next** to start the installation. View progress on the **Installing** page.



13. When the installation is complete, click **Finish** on the **Completing the KnowledgeTree Document Management System Setup Wizard** page. Note the following:

- If you left **View Readme File** selected, the **README** file opens. Review information on the page, which includes information about KnowledgeTree Professional, and instructions for completing the installation.
- If you left **Launch KnowledgeTree DMS now?** selected, KnowledgeTree opens at the [Dashboard](#) after you close the README file.



14. Follow the **Upgrade instructions** at the KnowledgeTree website. Click [here](#) to view upgrade instructions.

15. Perform the following tasks to complete the installation:

15.1. Change the default administrator username and password in **Preferences** (in DMS Administration).

Note: A default Admin user – username admin and password admin – is set up during installation. The default admin user login allows initial access to KnowledgeTree. You should change the defaults at your earliest convenience.

15.2. [Configure SSL](#) for the Apache Server in the KnowledgeTree Stack.

15.3. [Install KnowledgeTree Tools](#) (KTtools).

15.4. Log in to KnowledgeTree Document Management System to assign license keys. Go to [Adding / Allocating Keys](#) for more information about this procedure.

15.5. [Re-read](#) the plugins list on the **Plugins** page of the [Miscellaneous](#) section of DMS Administration

15.6. [Configure a connection](#) with KnowledgeTree Explorer.

6.2.3.4 Upgrading KnowledgeTree Professional to latest version KnowledgeTree Professional

This procedure upgrades your existing installation of **KnowledgeTree Professional**, to the latest version of KnowledgeTree Professional, using the **KnowledgeTree Professional Upgrade Installer for Windows / Linux**.

****Note:** This procedure describes the steps involved when using the **Professional Upgrade Installer for Windows**. The Professional Upgrade Installer for **Linux** differs in a few minor ways.

Prerequisites:

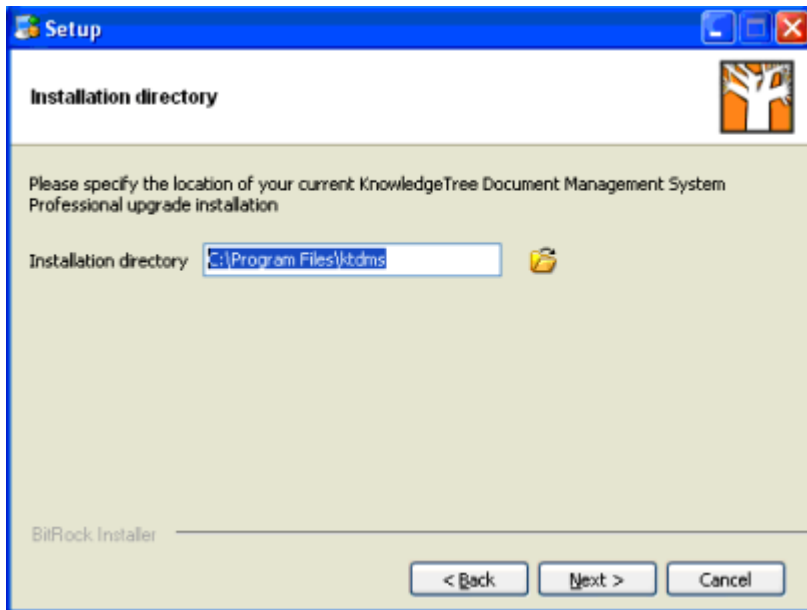
- You need to have [backed up](#) your existing installation of KnowledgeTree Document Management System before performing this upgrade.

Perform the following steps:

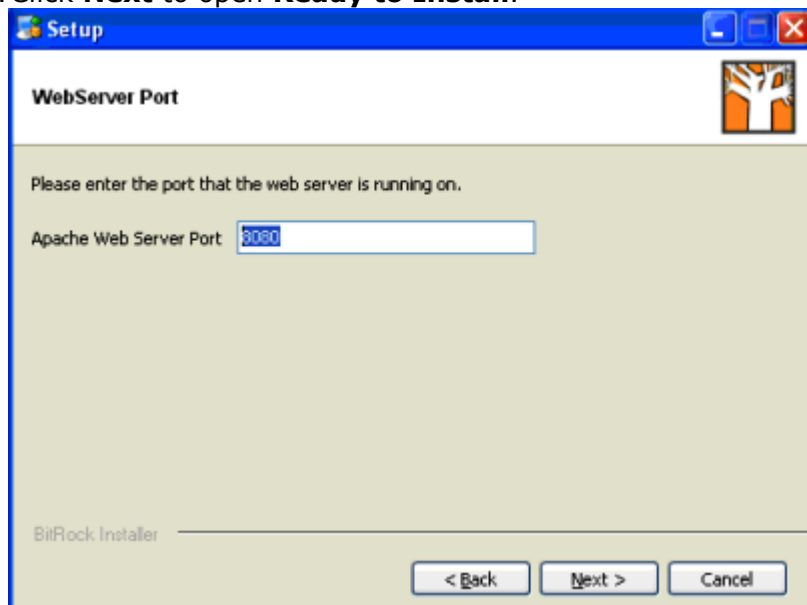
1. Download the [KnowledgeTree Professional Upgrade Installer for Windows / Linux](#) at the KnowledgeTree website.
2. Click on the file to launch the **KnowledgeTree Professional Upgrade Setup Wizard**. Click **Next** to open the **Installation directory** page.



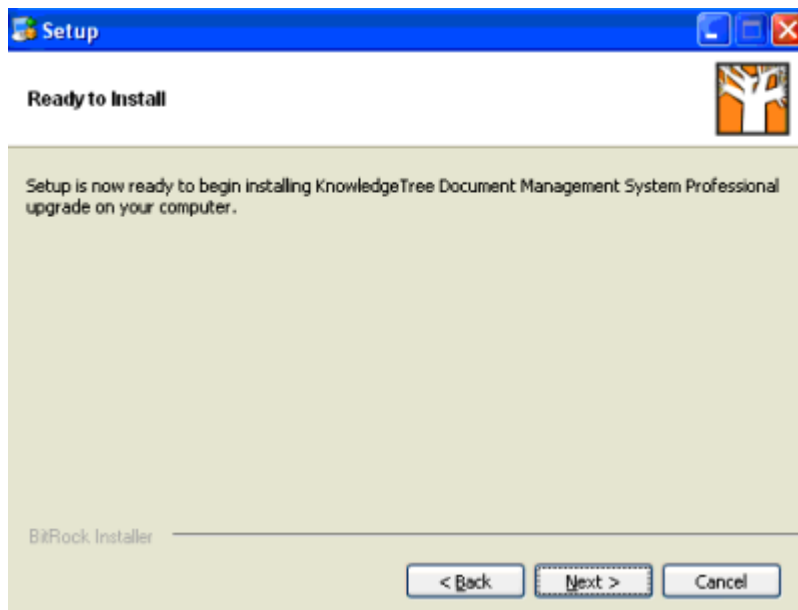
3. Accept the default install location, or click the **Browse** icon to select another location; then, click **Next** to open the **WebServer Port** page.



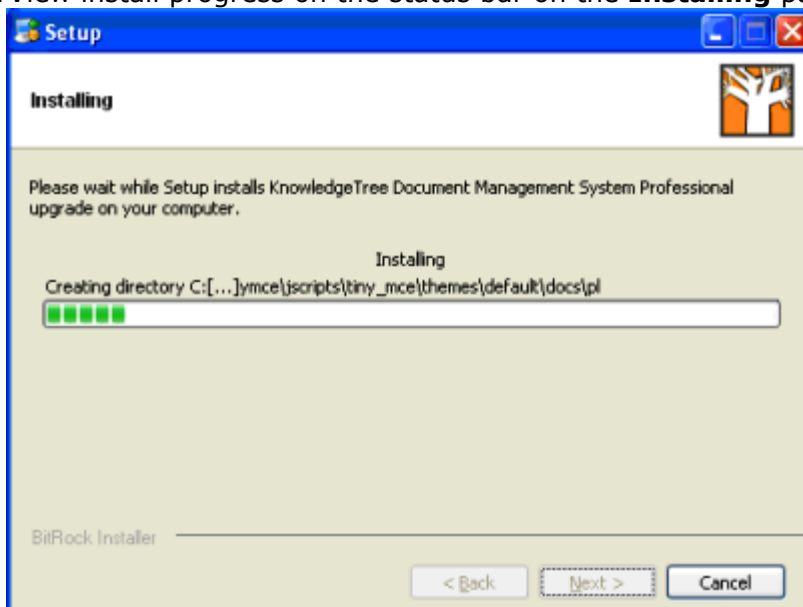
4. Click **Next** to open **Ready to Install**.



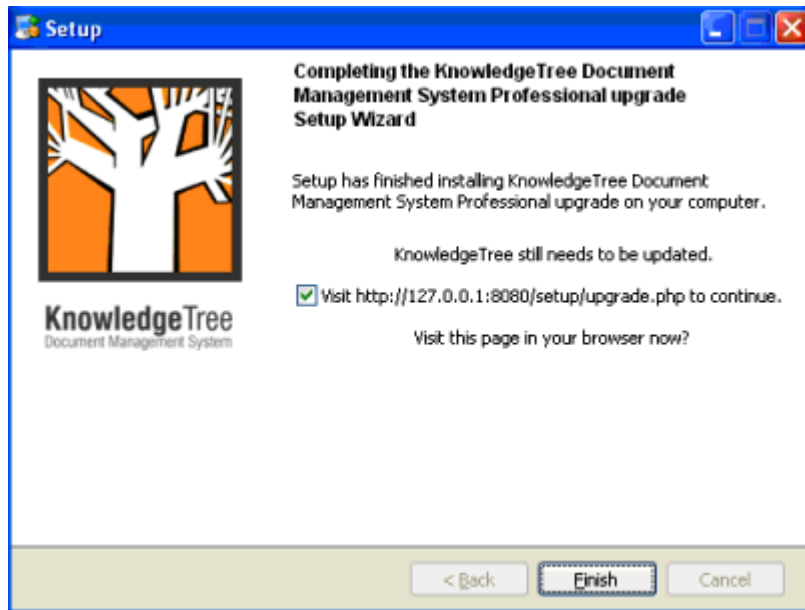
5. Click **Next** to start the upgrade installation.



6. View install progress on the status bar on the **Installing** page.



7. When Setup is complete, click **Finish** on the **Completing the ... Professional upgrade Setup Wizard**. Ensure that you leave the check box selected to go directly to Web page to complete the upgrade.



8. On the **KnowledgeTree Upgrades** page, review the upgrades that need to occur; then, click **Upgrade** to apply outstanding upgrades.

KnowledgeTree Upgrades

The table below describes the upgrades that need to occur to upgrade your KnowledgeTree installation to 3.0.3. Click on the button below the table to perform the upgrades.

Code	Description	Applied
upgrade*3.0.3*99*upgrade3.0.3	Upgrade from version 3.0.3 to 3.0.3	Yes

9. On **Show Upgrades**, verify that the upgrades have been successfully applied; then, close the page.

10. Open KnowledgeTree Document Management System from the **Start** menu.

6.2.3.5 Upgrading KnowledgeTree OSS (Stack Installed) to latest version OSS (Stack Installed)

This procedure upgrades your existing, stack installed **KnowledgeTree Open Source** installation - for KnowledgeTree Open Source versions 3.0.2 and above - to the latest version of **KnowledgeTree Open Source**, using the **KnowledgeTree OSS Upgrade Installer for Windows / Linux**.

Note: This procedure assumes that your current KnowledgeTree Open Source installation was installed using the Open Source Stack Installer.

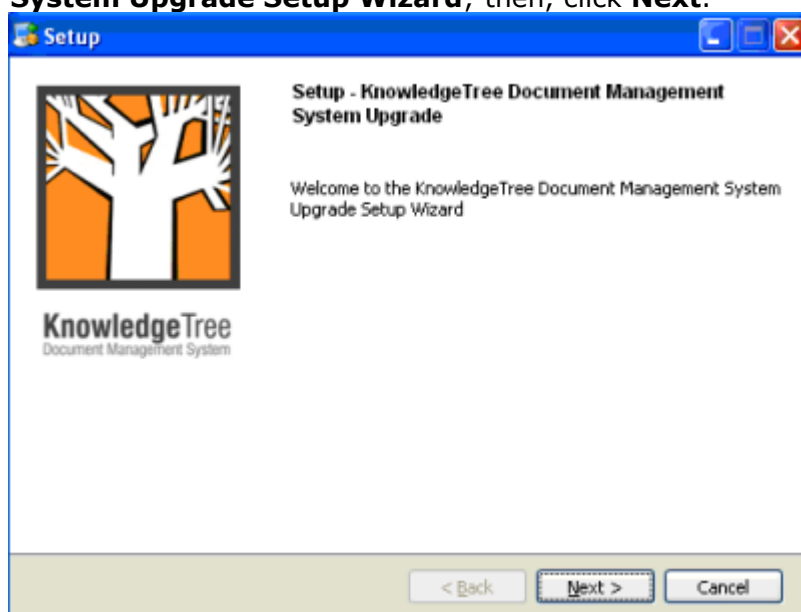
Note: This procedure describes the steps involved when using the **KnowledgeTree Open Source Upgrade Installer for Windows**. The OSS Upgrade Installer for **Linux** differs in a few minor ways.

Prerequisites:

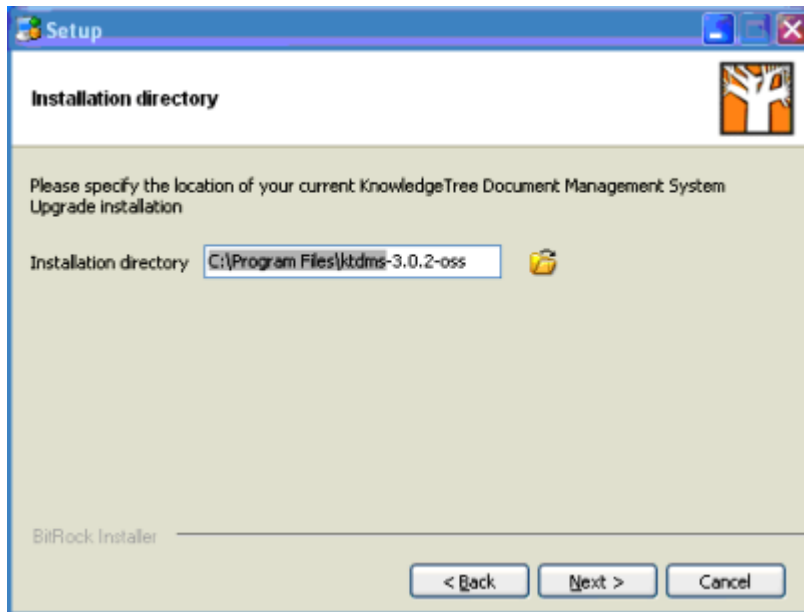
- You need to have performed a [backup](#) of your existing KnowledgeTree Document Management System before proceeding with this upgrade.

Perform the following steps:

1. Open your Windows system - Windows Server 2003, or Windows XP SP2.
2. Download and run the latest version of the **KnowledgeTree Open Source Upgrade Installer for Windows** at <http://www.ktdms.com/download>.
Note: If you're a Linux user, select the OSS Upgrade Installer for Linux.
3. Click on the file to launch the **KnowledgeTree Document Management System Upgrade Setup Wizard**; then, click **Next**.

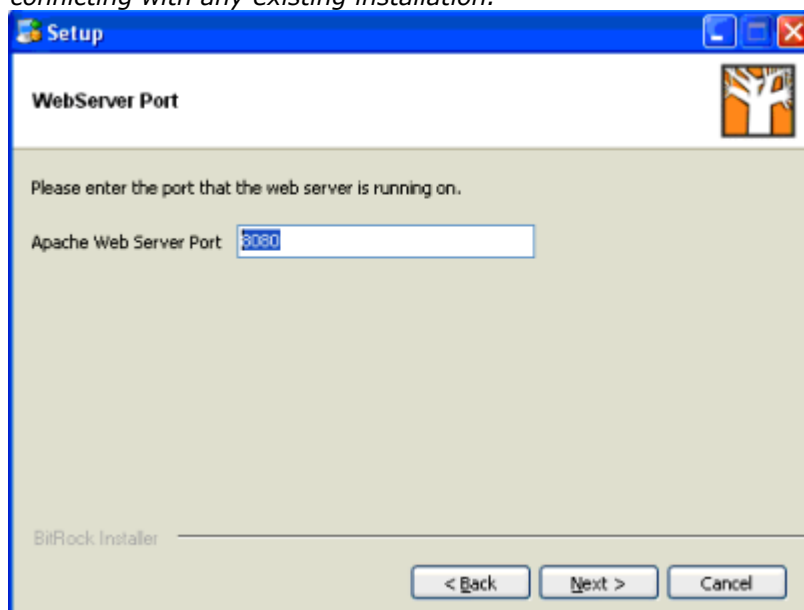


4. On the **Installation directory** page, accept the default install location, or click **Browse** to specify a different location; then, click **Next**.

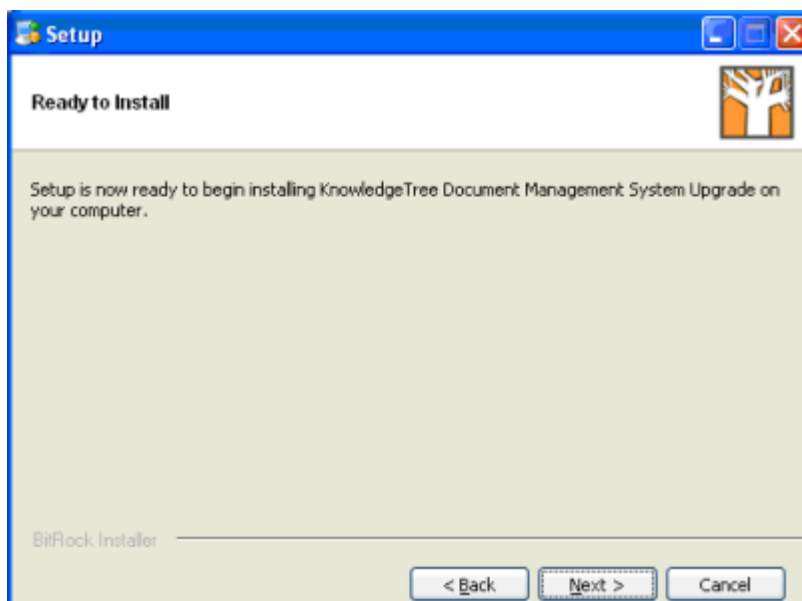


5. On the **WebServer** Port page, accept the default Apache Web Server Port; then click **Next**.

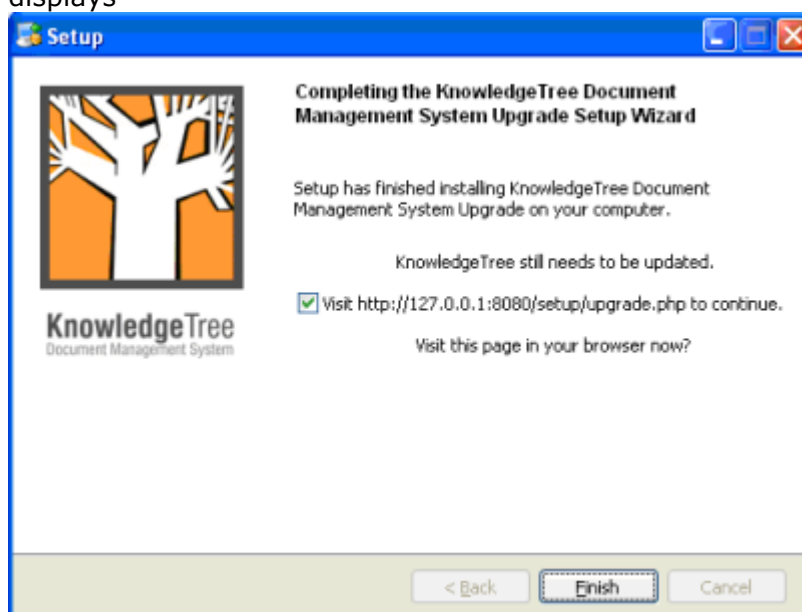
Note: The Stack Installer installs by default to port 8080. The manual install typically installs to port 80. Installing to a different port prevents the Stack Installer from conflicting with any existing installation.



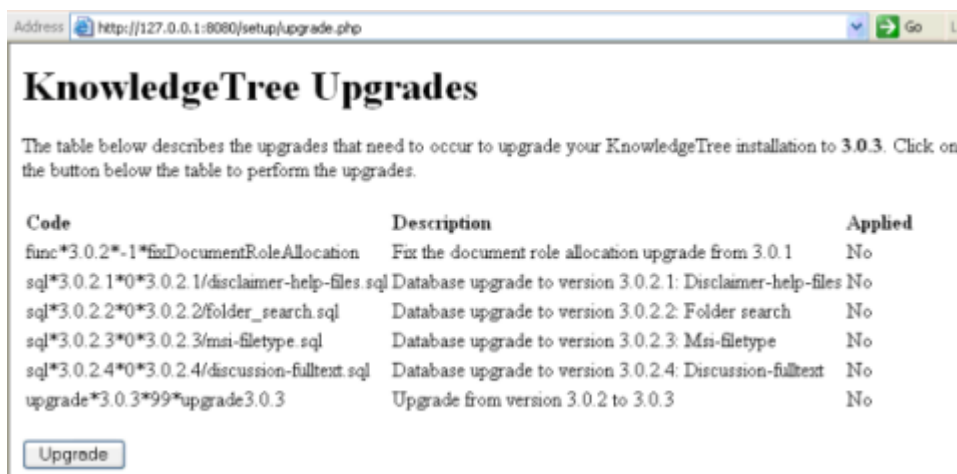
6. On the **Ready to Install** page, click **Next** to start the installation.



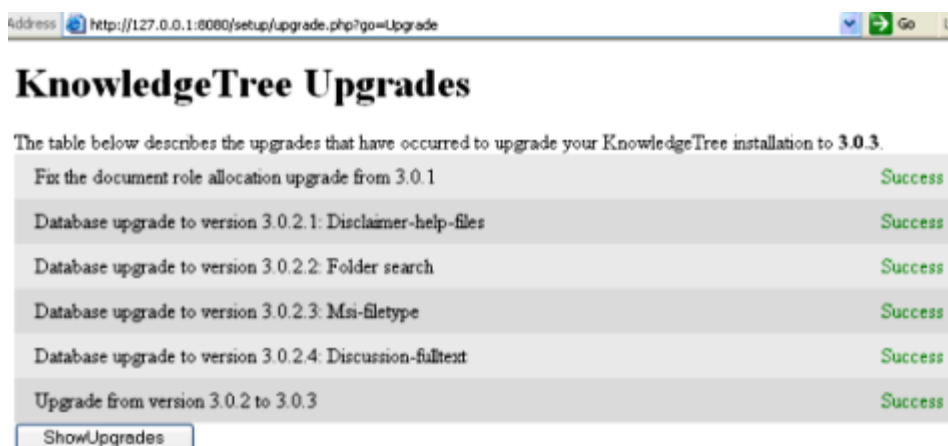
7. View install progress. When setup is complete, the **Completing the KnowledgeTree Document Management System Upgrade Setup Wizard** page displays



8. Leave the check box on the page selected in order to open the **Upgrades** page in your browser directly after you close the Wizard; then, click **Finish**.
9. The **KnowledgeTree Upgrades** page opens in your browser. Review the upgrades required to update your KnowledgeTree installation to the latest version; then, click **Upgrade**.



10. View upgrade results; then, close the page in your browser.



11. Open **KnowledgeTree Document Management System** from the **Start** menu.

6.2.3.6 Upgrading KnowledgeTree OSS (manually installed) to KnowledgeTree OSS (Stack Installed)

This procedure upgrades your existing, manually installed KnowledgeTree Open Source installation to the latest version of KnowledgeTree Open Source (Stack Installed).

Note: This procedure describes the steps involved when using the **Open Source Stack Installer for Windows**. The Professional Stack Installer for **Linux** differs in a few minor ways.

Prerequisites:

- You must have performed a [backup](#) of your KnowledgeTree Document Management System before upgrading.
- You must have performed a *manual* upgrade to the latest version of KnowledgeTree Open Source before running the Open Source Stack Installer. Click [here](#) to download the latest Source Only package for Windows / Linux at the KnowledgeTree website; then, follow the instructions in Upgrade.txt, located in the Docs directory of the Source Only package.

Note: KnowledgeTree **Source Only** Packages contain the KnowledgeTree application and installation instructions. You will need to be familiar with installing and configuring all required components.

Perform the following steps:

1. Have you backed up your current installation?

- **Yes.** Go to step 2.
- **No.** Please perform a [backup](#) of your KnowledgeTree Document Management System before continuing with this upgrade.

2. Have you manually upgraded your manually installed KnowledgeTree Open Source installation to the latest version of KnowledgeTree Open Source, using the Source Only package for Windows / Linux?

- **Yes.** Go to step 3.
- **No.** Click [here](#) to download the latest Source Only package from the KnowledgeTree website before continuing with the upgrade. After installing the latest Source Only package, complete the upgrade by following the upgrade instructions for the Source Only package on the KnowledgeTree website. For more information, see [Upgrading KnowledgeTree OSS \(manually installed\) to latest version OSS \(manually installed\)](#).

Note: KnowledgeTree **Source Only** Packages contain the KnowledgeTree application and installation instructions. You need to be familiar with installing and configuring all required components.

3. Download and run the **KnowledgeTree Open Source Stack Installer for Windows / Linux** at the [KnowledgeTree website](#).
4. Read the **Security Warning**; then, click **Run** to launch the **KnowledgeTree Setup Wizard**.
5. Click through the pages of the Setup Wizard.
6. When you're done, click [here](#) to follow upgrade instructions on the KnowledgeTree website to complete the upgrade install to **KnowledgeTree Open Source Stack Installed**.

6.2.3.7 Upgrading KnowledgeTree OSS (manually installed) to latest version OSS (manual install - Source Only Package)

This procedure upgrades your existing, manually installed **KnowledgeTree Open Source** installation to the latest version of KnowledgeTree Open Source, using the **KnowledgeTree Open Source 'Source Only Package'**.

Note: KnowledgeTree **Source Only** Packages contain the KnowledgeTree application and installation instructions. You will need to be familiar with installing and configuring all required components.

Prerequisites:

- [Backup](#) your KnowledgeTree system before upgrading.

Perform the following steps:

1. Download the latest [Source Only Package](#) for Windows / Linux at the KnowledgeTree website.
2. Follow the instructions in **Upgrade.txt**, located in the *Docs* directory of the **Source Only Package**.
3. Review the Install notes for Windows / Linux at the [download page](#) for KnowledgeTree Open Source (Source Only) downloads on the KnowledgeTree website.

6.2.3.7.1 Source Only Install Notes for Windows

This procedure performs a manual upgrade of your existing KnowledgeTree Open Source installation, to the latest version of KnowledgeTree Open Source, in a Windows environment.

Important:

If your current KnowledgeTree Open Source installation is older than version 3.0.2, you *must* use this manual procedure to upgrade your installation to the latest version of KnowledgeTree Open Source.

Note: Quick Installers are available for the KnowledgeTree Open Source upgrade, but these can only be used when upgrading from KnowledgeTree Open Source version 3.0.2 and above, to the latest version of KnowledgeTree Open Source. At the time of writing (June 2006), the latest version of KnowledgeTree Open Source is version 3.0.3.

Prerequisite:

Please ensure that you have a backup of your documents and your directory before attempting this upgrade.

Perform the following steps:

1. Upgrade your existing the Document Management System to the latest version of KnowledgeTree Open Source.

2. Export your current dms database using phpmyadmin.
Important: You MUST ensure that you export both structure and data, and that **disable foreign key checks** is enabled.
3. Name this file data.sql; then, save it in the installation directory of your new install.
4. Open a command terminal (run: cmd.exe)
5. Change directory to your bitrock installation directory.
6. In the installation directory, run "upgrade.bat"
7. You will be asked for the dmsAdmin password you entered during install (4 times).
Note: This includes a delete on your Bitrock MySQL db so do not be alarmed by a system message that tells you the delete will destroy your data. This is only acting on the BitRock code.
6. This will backup the bitrock supplied data to data.sql.backup
7. It will then install your old data into the bitrock database.
8. Copy your documents folder to the "documents" directory in the new install location.
9. Log in.

6.2.3.7.2 Source Only Install Notes for Linux

Important: Please ensure that you have a backup of your documents and your directory before attempting this upgrade.

Perform the following steps:

1. Upgrade to the latest version of KnowledgeTree Open Source.
2. Export your current dms database using phpmyadmin.
Important: You MUST ensure that you export both structure and data, and that **disable foreign key checks** is enabled.
3. Name this file data.sql; then, save it in the installation directory of your new install.
4. In the installation directory, run "sh upgrade.sh"
5. You will be asked for the dmsAdmin password you entered during install (4 times).
Note: This includes a delete on your Bitrock MySQL db so do not be alarmed by a system message that tells you the delete will "...will destroy your data.." This is only

acting
on the BitRock code.

6. This will backup the bitrock supplied data to `data.sql.backup`
7. It will then install your old data into the bitrock database.
8. Copy your documents folder to the "documents" directory in the new install location.
9. Log in.

6.3 New Installs

This section provides instruction for installing KnowledgeTree Open Source, or KnowledgeTree Professional - for Windows or Linux - where there are *no* previous installations of KnowledgeTree Document Management System.

Note: See [Upgrading](#) above for information about upgrading KnowledgeTree Document Management System to the latest version (Open Source or Professional), or to find out how to upgrade from the Open Source edition to KnowledgeTree Professional.

6.3.1 Scenarios for New Installs

Note: KnowledgeTree Stack Installers install Apache and MySQL, so we do not recommend that you install the Stack Installers on servers that have Apache and MySQL unless you have MySQL and Apache administration experience.

If you require then use
KnowledgeTree Professional	<ul style="list-style-type: none">• KnowledgeTree Professional Stack Installer for Windows / Linux and,• KnowledgeTree Tools for Windows (KTtools) See New Install - Installing KnowledgeTree Professional using the Stack Installer for Windows / Linux and, Installing KnowledgeTree Tools for Windows
KnowledgeTree Open Source (OSS) - Stack Installed	<ul style="list-style-type: none">• KnowledgeTree Open Source Stack Installer for Windows / Linux See New Install - Installing KnowledgeTree Open Source using the Stack Installer for Windows / Linux
KnowledgeTree Open Source - manually installed	<ul style="list-style-type: none">• KnowledgeTree Open Source - Source Only Package See New Install - Installing KnowledgeTree Source Only Package

6.3.2 New Install of KnowledgeTree Open Source using the Source Only Package

This procedure manually installs the latest version of **KnowledgeTree Open Source** to a clean environment (i.e. where there are no previous installations of KnowledgeTree) on generic Windows systems, and on Unix-like operating systems.

Important:

Manual installations of the KnowledgeTree Open Source Document Management System are **not** supported. We recommend that you use the [KnowledgeTree Open Source Stack Installer \(for Windows / Linux\)](#) to install KnowledgeTree Open Source. The OSS Stack Installer installs PHP, MySQL, Apache, and includes the external applications required for running KnowledgeTree Open Source. You can download the **OSS Source Only Stack Installers** at the KnowledgeTree website.

Prerequisites:

You need to have the correct version of **PHP**, **MySQL** and **Apache** installed and configured for the latest version of KnowledgeTree:

- Apache 1.3 or above
- MySQL 4.0 or above with INNODB support
- PHP 4.3.0 or above, but not PHP 5.0 or above

Perform the following steps:

1. Download the **KnowledgeTree Source Only** package from the KnowledgeTree website.
2. Create the environment for installing KnowledgeTree Open Source:
 - 2.1. Move the KnowledgeTree folder to the directory where it is going to be served from:

```
$ mv knowledgeTree /path/to/your/html/directory/
```
 - 2.2. Configure your Web server to access KnowledgeTree Document Management System.
 - 2.3. Run the installation setup script. If your KnowledgeTree installation is at `http://localhost/`, go to <http://localhost/setup/>
Note: *If the installation setup script fails, review your configuration, or ask your systems administrator for assistance.*
 - 2.4. Set up the database - see the steps in the table below and follow the instructions for your environment:

Operating System	Tasks
Unix-based	Step 1: Create a database <pre>\$ mysqladmin -p create dms</pre>
	Step 2: Create and populate the tables <pre>\$ mysql -p dms < sql/mysql/install/structure.sql \$ mysql -p dms < sql/mysql/install/data.sql</pre>
	Step 3: Create the database users <pre>\$ mysql -p dms < sql/mysql/install/user.sql</pre>
Windows	Note: Locate the MySQL applications on your system; then, use the path to these applications in the commands below.
	Step 1: Create a database <pre>x:\> mysqladmin -p create dms</pre>
	Step 2: Create and populate the tables <pre>X:\> mysql -p dms < sql/mysql/install/structure.sql X:\> mysql -p dms < sql/mysql/install/data.sql</pre>
	Step 3: Create the database users <pre>\$ mysql -p dms < sql/mysql/install/user.sql</pre>

2.5. Configure your installation in config/config.ini:

Note: The default configuration determines many settings on your installation automatically, and this is the preferred method of running KnowledgeTree. Please do not manually adjust these settings unless you know what you are doing.

Note: The default configuration uses default settings for the database location, username and password. These are defined in the **user.sql** file mentioned above. If you have followed the examples above when setting up the database, then KnowledgeTree should be fully configured to work.

The following settings in config/environment.php control the database connectivity. By default, these settings are:

```
[db]
dbHost          = localhost
dbName         = dms
dbUser         = dms
dbPass         = dmspassword
```

Important

We strongly recommend that you modify your configuration to comply with your platform's security best practices after you have completed your initial evaluation of KnowledgeTree. This modification should include changing the default database connection settings.

3. Verify file access permissions on the KnowledgeTree folders.

- Your Web server **MUST** be able to write to the 'var' folder in the root of the KnowledgeTree installation.
- The installation setup script (see above) will display the user (Unix user account) that must be able to write to these folders.

Note: The installation setup script will not show the account name for Windows users because there is no commonly available way to do this. The user needs to know what the account name is.

- Your Web server should preferably not be able to write to the remaining folders – e.g. if your Web server is running as user 'nobody' and group 'nogroup', then change to the KnowledgeTree directory and type:

Unix-based systems	'chown -R nobody.nogroup var'
Windows	Check the folder's Permissions and Security tabs: Right click on the folder; then, select Properties .

4. Review the post-installation check list. If your KnowledgeTree installation is at <http://localhost/>; then, go to <http://localhost/setup/> and click, **Post-installation checkup**.

Note: The checkup will alert you if there are errors and provide information about the error – e.g. that it cannot read/write to a certain location, or that it cannot connect to the database. Review the steps above to fix the error.

5. Login to the KnowledgeTree Document Management System.

5.1. Use your Web browser to navigate to your KnowledgeTree installation.

5.2. Enter your username and password on the **Login** screen; then, click **OK**.

Note: A default Admin user – username admin and password admin – is set up during installation. The default admin user login allows initial access to KnowledgeTree.

6. Install the following external applications to enable file indexing.

Note: KnowledgeTree's file indexing and other features require the use of external programs.

Note: We recommend that you use the package and configuration management facilities of your operating environment to install these applications – for example, using the **rpm** or **apt-get** tools on **Linux** systems.

Note: Indexing is automatically installed when you install KnowledgeTree Open Source using the Open Source Stack Installer. You can download the Open Source Stack Installer at the KnowledgeTree website.

- **Xpdf** – from <http://www.foolabs.com/xpdf/> (for indexing PDF documents)
- **Unzip** – from <http://www.info-zip.org/> (for bulk upload and indexing)

OpenDocument support)

- **zip** – from <http://www.info-zip.org/> (for bulk export)

Depending on your operating system, you will require the following additional applications:

If you are a ...	then you need ...
Linux user	catdoc – from http://www.45.free.net/~vitus/software/catdoc/ (to index Microsoft Word, Microsoft Excel, and Microsoft PowerPoint files).
Windows user	antiword – from http://www.winfield.demon.nl (to index Microsoft Word files)

Note: Microsoft Excel files use a built-in process, and there is currently no indexing of Microsoft PowerPoint files on the Microsoft Windows platform.

7. Have you experienced errors in the installation?

- **Yes.** Go to step 7.1 for troubleshooting information.
- **No.** Exit this procedure.

7.1. Ensure that your KnowledgeTree installation passes all the pre-installation and post-installation checkups.

7.2. If you require further assistance, refer to the *Frequently Asked Questions* list on the KnowledgeTree Wiki at <http://issues.ktdms.com/confluence/> or request information at the KnowledgeTree forums at <http://forum.ktdms.com/>.

7.3. If you believe that you have found a bug, please report it to the KnowledgeTree bug reporting system at <http://issues.ktdms.com/>.

Important: Commercial support is only available to licensed users of **KnowledgeTree Professional**. See [Getting Help](#) for information on community support for KnowledgeTree Open Source.

6.3.3 New Install of KnowledgeTree Open Source using the OSS Stack Installer

This procedure installs **KnowledgeTree Open Source** on your Windows / Linux computer, using the **KnowledgeTree Open Source Stack Installer for Windows / Linux**.

Note: This procedure is documented for Windows users. The OSS Stack Installer for Linux differs in a few, minor way - related mainly to setting up services. Where necessary, these

differences are described in the documentation.

Note: Please see the [KnowledgeTree](#) website for more information about this procedure, including additional requirements and /or new forms that may have been added since the publication of this manual.

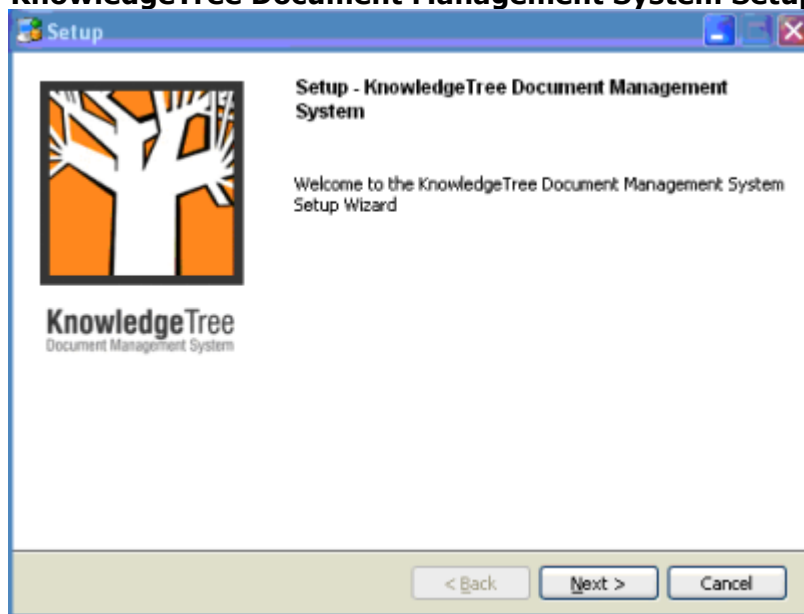
Prerequisites:

You must be installing to a [supported platform](#).

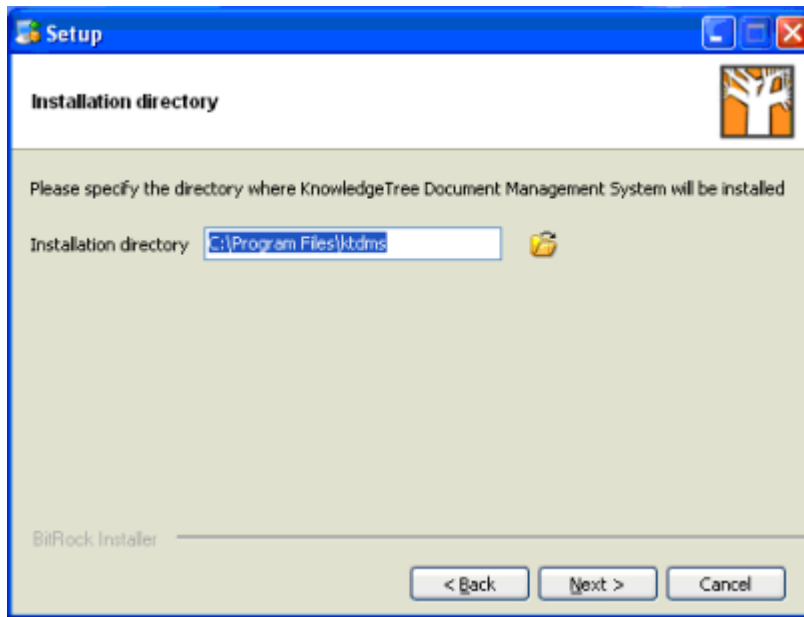
Note: You will need to perform a manual install using the [Source Only](#) package when installing to a non-supported platform.

Perform the following steps:

1. Navigate to the [download](#) page for KnowledgeTree Open Source at the KnowledgeTree website.
2. Locate the latest version of KnowledgeTree Open Source Stack Installer for your platform - Windows or Linux - then, click on the file to launch the **KnowledgeTree Document Management System Setup Wizard**.

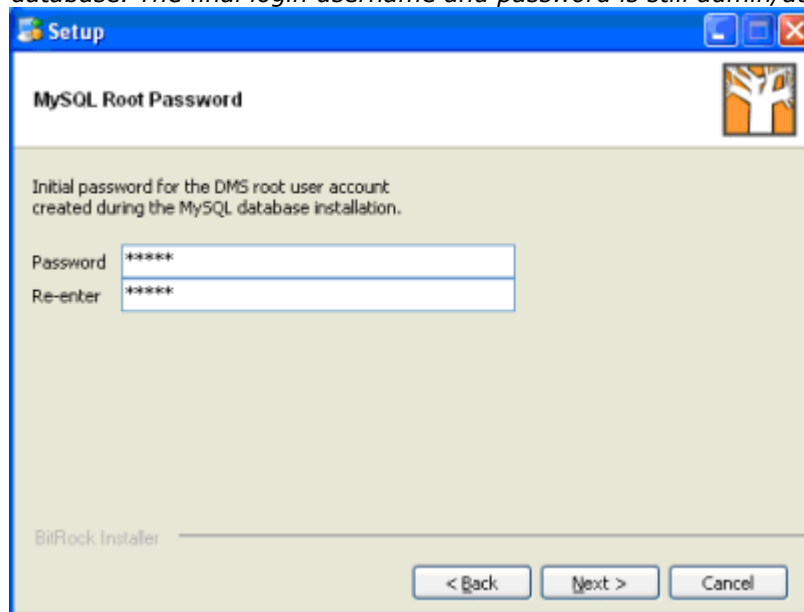


3. Click **Next** to open the **License Agreement**. Accept the agreement; then, click **Next** to open the **Installation directory** page of the Setup Wizard.
4. Accept the default install location, or browse to a different install location. When you're done, click **Next** to open the **MySQL Root Password** page.

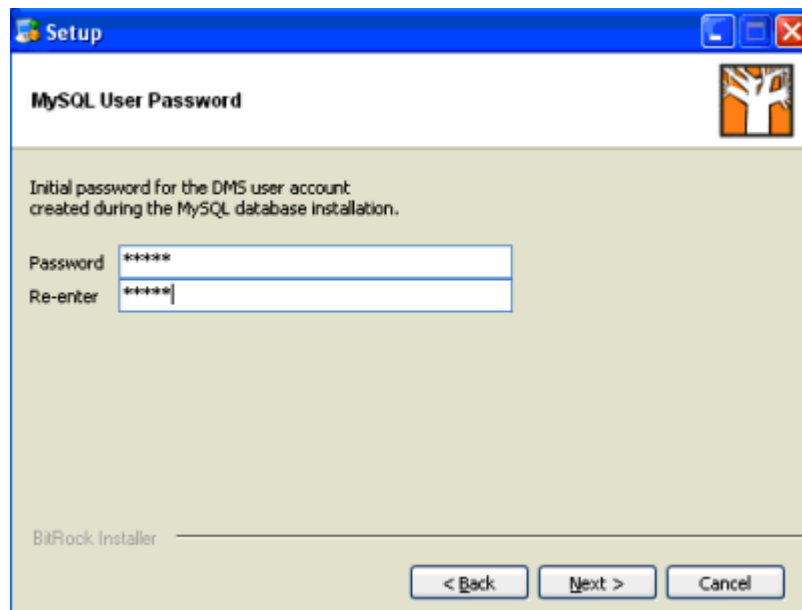


5. Enter a password on the **MySQL Root Password** page; then, click **Next** to open the **MySQL User Password** page.

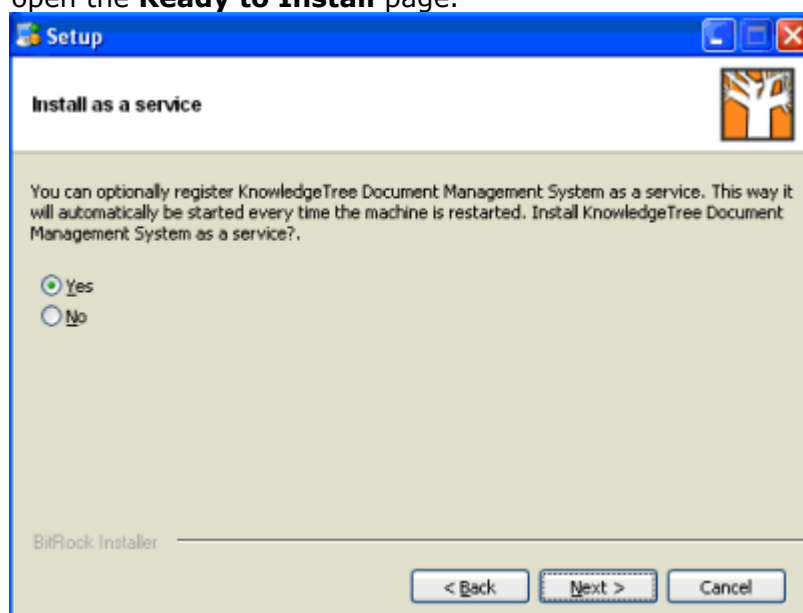
Note: The passwords you define during the installation are used for accessing the MySQL database. The final login username and password is still admin/admin.



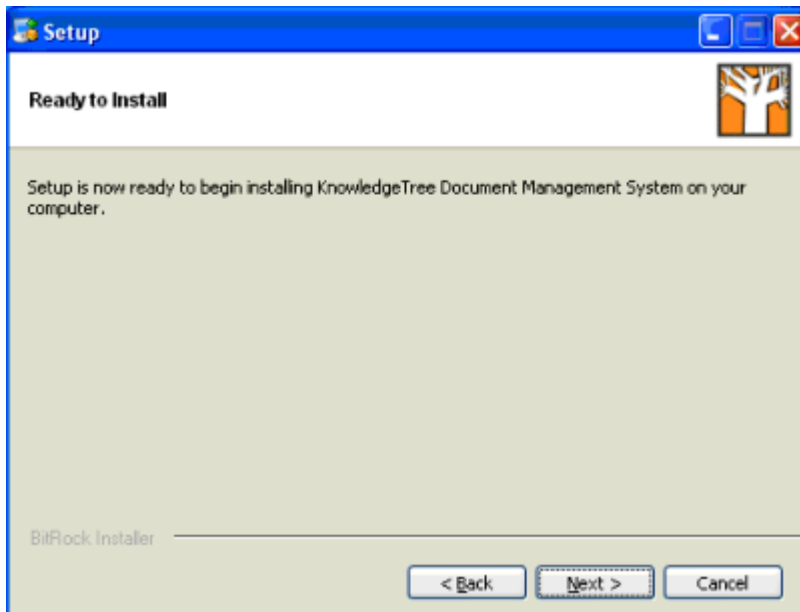
6. Enter a password on the **MySQL User Password** page; then, click **Next** to open the **Install as a service** page.



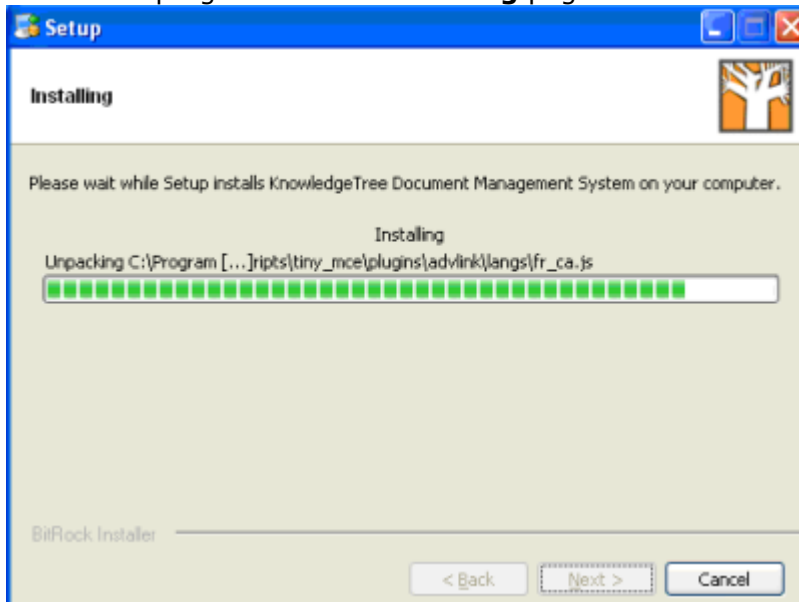
7. Define whether or not to register KnowledgeTree as a service; then, click **Next** to open the **Ready to Install** page.



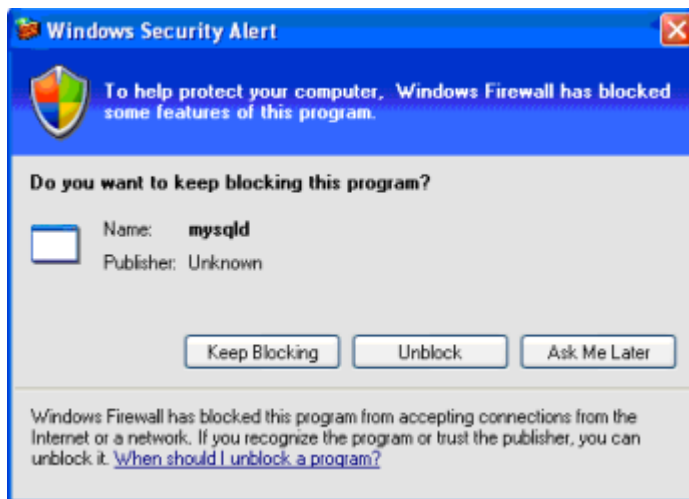
8. Click **Next** to start the installation.



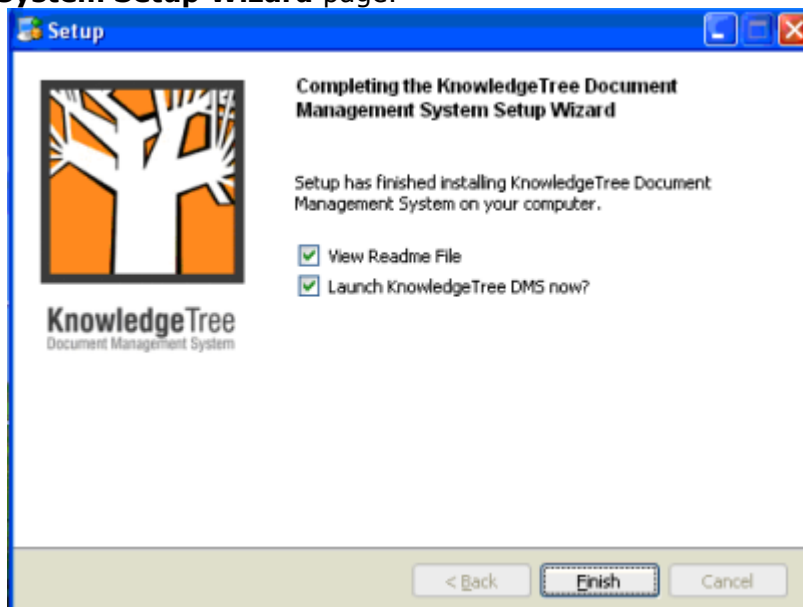
9. View install progress on the **Installing** page.



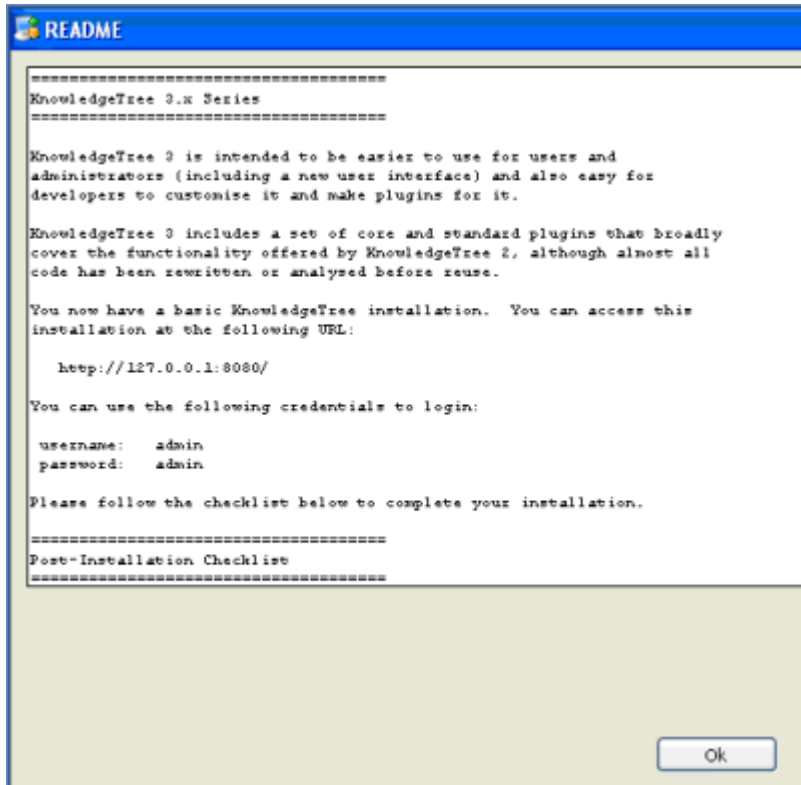
Note: Windows XP SP2 users may receive a Windows Security Alert blocking MySQL and Apache.
Unblock each of these programs.



10. Click **Finish** on the **Completing the KnowledgeTree Document Management System Setup Wizard** page.



- 10.1. If you have left **View Readme File** selected, the **README** file opens. Review readme information to find out more about the steps you need to take to set up the DMS after installation, such as changing default user name and password, registering plugins, etc. Click **Ok** to close the file.



10.2. If you have left **Launch KnowledgeTree DMS now?** selected, the **Login** page displays; enter the default user name and password to open KnowledgeTree Document Management System.

Note: A default Admin user – username **admin** and password **admin** – is set up during installation. The default admin user login allows initial access to KnowledgeTree. You should change the defaults at your earliest convenience.

KnowledgeTree
Document Management System

Please enter your details below to login.

Username
admin

Password

Language
English (United States)

login

KnowledgeTree Version
OSS 3.0.3a

16. The system opens at the **Dashboard** after the login step.

The screenshot displays the KnowledgeTree 3.0 Dashboard. At the top, there is a header with a logo placeholder on the left and the KnowledgeTree logo on the right. Below the header is a navigation bar with tabs for 'Dashboard', 'Browse Documents', and 'DMS Administration'. The user is identified as 'Administrator' with links for 'Preferences' and 'Logout'. The main content area is divided into several sections: a welcome message, a list of features, a search bar, and a mail server status warning. The footer contains copyright information and the version number.

Your Company Logo Goes Here
Update your configuration to include your own logo.

KnowledgeTree
Document Management System

Dashboard Browse Documents DMS Administration Administrator Preferences Logout

you are here: [dashboard](#) (home)

KnowledgeTree
Dashboard

Welcome to KnowledgeTree 3.0

KnowledgeTree is a commercial open source, web-based Document Management System. KnowledgeTree allows you to move away from uncontrolled and unaudited shared network drives to an environment which encourages knowledge sharing and meets regulatory requirements.

KnowledgeTree provides:

- A central document repository with audited document content version control
- Powerful document metadata management and versioning
- Sophisticated document authoring management and workflow
- Full-text indexing technology allowing search within document contents
- Powerful security group and role-based security model and integration with Directory Servers.

[Edit this introduction.](#)

Items that require your attention

No items require your attention.

Indexer Status

All indexers claim to be working correctly.

Search

[Advanced Search](#)

Mail server status

Email has not been configured on this server. Emailing of documents and sending of notifications are disabled.

Edit the [email] section of the config.ini file to set your email server and the sending address of the KnowledgeTree server.

© 2006 [The Jam Warehouse Software \(Pty\) Ltd.](#) All Rights Reserved — KnowledgeTree Version: OSS 3.0.3a — Request created in 1.804s

17. Change the default administrator username and password in **Preferences**.

18. Set up the DMS - see [DMS Administration](#).

6.3.3.1 Linux OSS Installation Notes

To add this installation to your system startup scripts, you need to ensure that the **dmsCtrl.sh script** is linked into your **init.d directory**, and that it is placed into the startup and shutdown procedures for **runlevel 3**.

Note: You must have installed KnowledgeTree using the **KnowledgeTree Open Source Stack Installer for Linux** before performing this procedure.

If you have installed **KnowledgeTree Source Only Package** - the manual install - you must manually configure Apache and MySQL to startup at boot time because the KnowledgeTree Stack Installer includes an automatic installation of Apache and MySQL.

Perform the following steps:

1. Create a symlink in `/etc/rc3.d` called `s45ktdms` to `dmsctl.sh` in your installation directory.
2. Create a symlink in all the other `/etc/rcX.d` directories called `k1ktdms` to `dmsctl.sh` in your installation directory.

6.3.4 New Install of KnowledgeTree Professional using the Stack Installer



This procedure installs **KnowledgeTree Professional** to a clean environment (i.e. where there are no prior KnowledgeTree installs), on a Windows system, using the **KnowledgeTree Professional Stack Installer for Windows**.

Note to Linux users: The quick install procedure for Linux differs in a few, minor ways from the quick install for Windows. This relates mainly to setting up services. Where necessary, these differences are described in the documentation.

Note: KnowledgeTree Stack Installers install Apache and MySQL, so we do not recommend that you install the Stack Installers on servers that have Apache and MySQL unless you have MySQL and Apache administration experience.

Uninstall - Important

You MUST restart your computer after uninstalling this application. If you install KnowledgeTree as a service, please disable Apache and MySQL services, using the links in the **Start Menu**, **BEFORE** uninstalling KnowledgeTree.

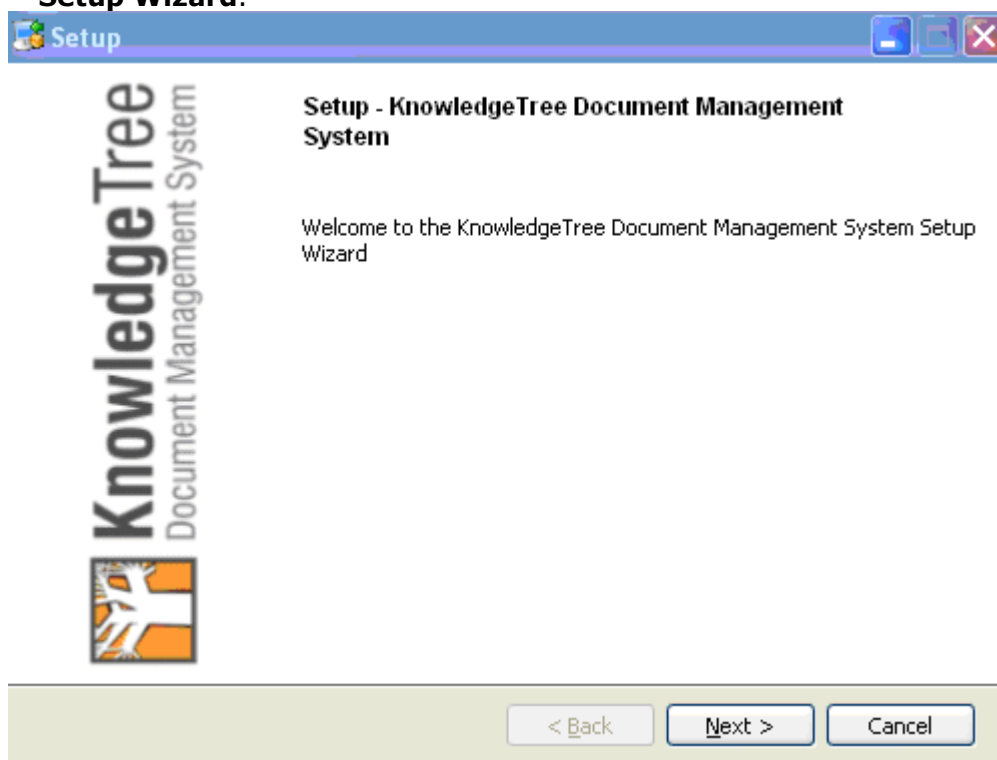
Prerequisites

Ensure that you're installing to one of the [supported platforms](#) for KnowledgeTree Professional.

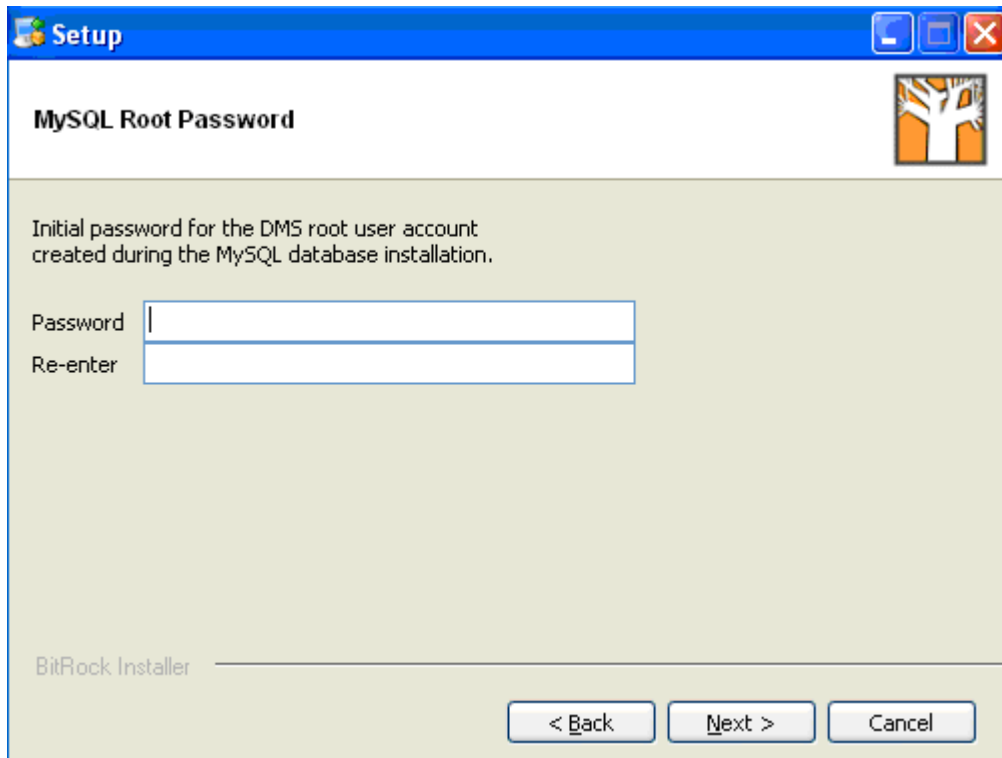
Perform the following steps:

1. Download the latest version of the KnowledgeTree Professional Stack Installer for Windows / Linux on the download page on the KnowledgeTree website at <http://www.ktdms.com/download>.

2. On the **File Download** dialog box, click **Save** to save the file to your computer.
3. Read the **Security Warning**; then, click **Run** to launch the **KnowledgeTree Setup Wizard**.



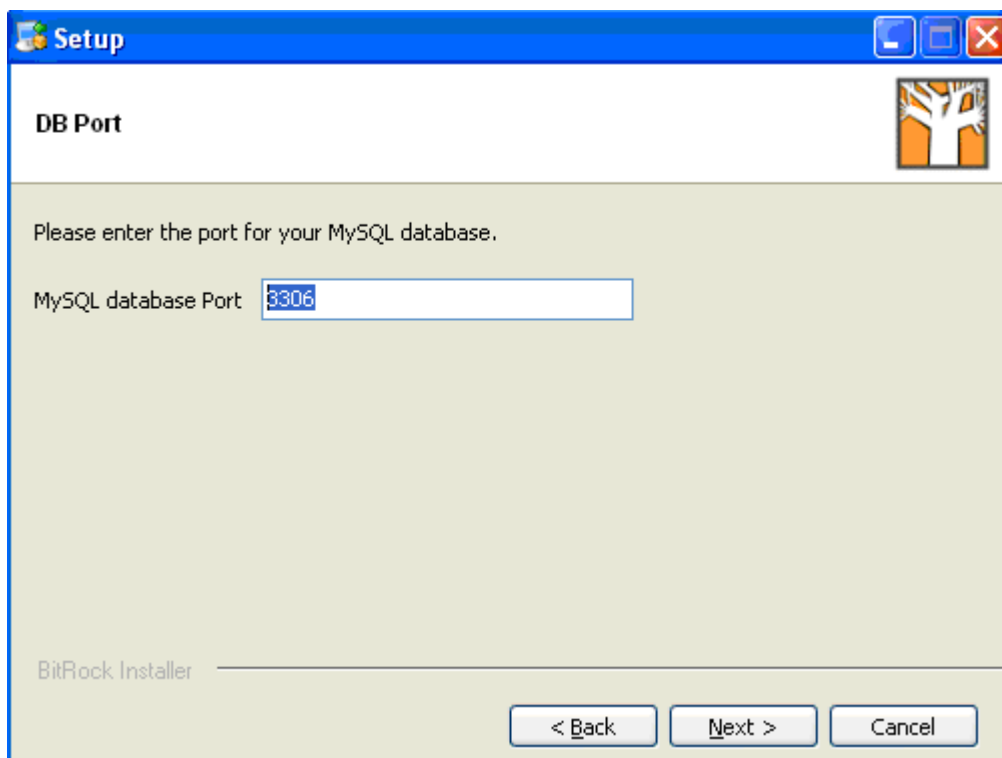
4. Click **Next** to open the **License Agreement**. Accept the agreement; then, click **Next** to open the **Installation Directory** page of the Setup Wizard.
5. Accept the default install location, or browse to select an alternate directory. When you're done, click **Next** to open the **MySQL Root Password** page of the Setup Wizard.



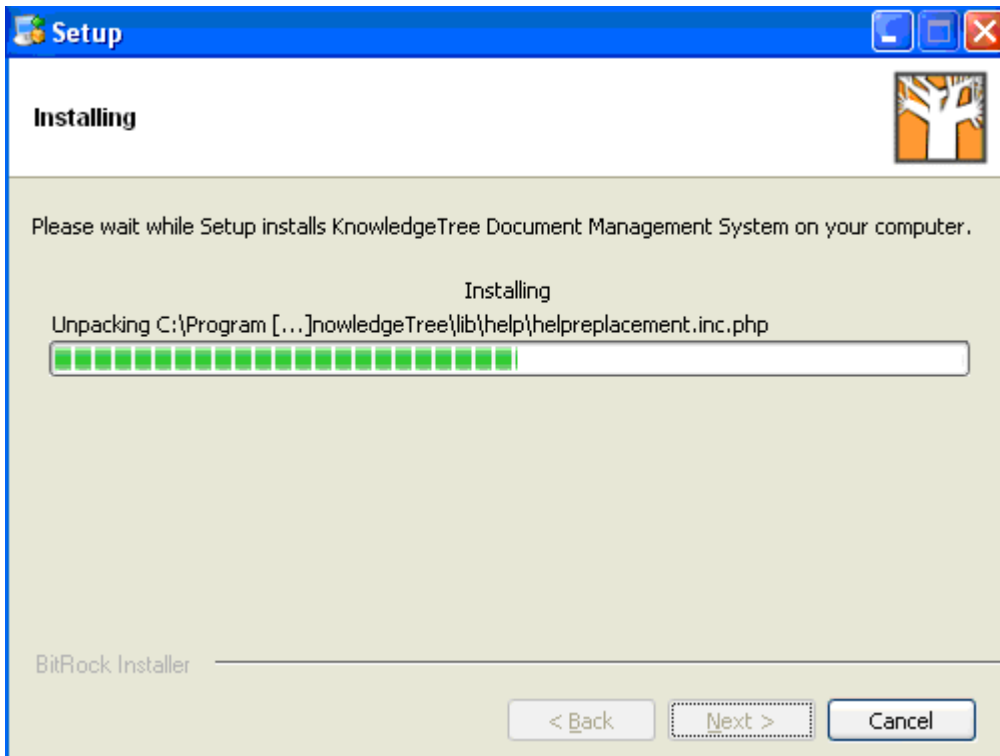
6. Enter a password on the **MySQL Root Password** page; then, click **Next** to open the **MySQL User Password** page.

Note: The passwords you define during the installation are used for accessing the MySQL database. The final login username and password is still 'admin/admin'.

7. Enter a password on the **MySQL User Password** page; then, click **Next** to open the **DB Port** page.



8. Enter the port for your MySQL database on the **DB Port** page; then, click **Next** to open the **WebServer Port** page.
Note: A system messages advises you if the system cannot bind to the standard ports - port 3306 for MySQL, and port 8080 for Apache. In this case you will need to define an alternative port.
9. Enter the Apache Web server port; then, click **Next** to open the **Install as a service** page.
10. Read the instruction on this page to decide whether or not to register KnowledgeTree as a service; then, select either **Yes** or **No**. Click **Next** to open the **Ready to Install** page.
11. Click **Next** to start the installation. View progress on the installation on the **Installing** page.



12. When the installation is complete, click **Finish** on the **Completing the KnowledgeTree Document Management System Setup Wizard** page.

12.1. Leave the **View Readme File** check box selected to open the **README** file. Read the information on the page, which includes information about KnowledgeTree Professional, and it details the steps you need to take to complete the installation.

12.2. Leave the **Launch KnowledgeTree DMS now?** checkbox selected to open the Web-Interface KnowledgeTree Document Management System at the [Dashboard](#) after you close README.



13. Change the default administrator username and password in **Preferences**.

Note: A default Admin user – username admin and password admin – is set up during installation. The default admin user login allows initial access to KnowledgeTree. You should change the defaults at your earliest convenience.

14. Perform the following tasks to complete this installation:

- 14.1. [Configure SSL](#) for the Apache Server in the KnowledgeTree Stack.
Note: This is an optional task, which is only required if you want to enable SSL for your environment.
- 14.2. [Install KnowledgeTree Tools](#) (KTtools).
- 14.3. Log in to KnowledgeTree Document Management System to assign license keys. Go to [Adding / Allocating Keys](#).
- 14.4. Register [plugins](#).
- 14.5. [Configure](#) a connection with KnowledgeTree Explorer.
Note: You should only be required to configure the connection where you are performing a new install of KnowledgeTree Professional Explorer and KnowledgeTree Tools (KTtools). Typically, the upgrade installer saves the information from the previous connection you configured and does not remove it during upgrade.

6.3.4.1 Configuring SSL for the Apache Server in the KnowledgeTree Stack

This procedure enables SSL for the Apache server in the KnowledgeTree stack. This is an *optional* task, which you will *only* need to perform if you want to enable SSL for your environment.

Note: You can use this procedure for both Windows or Linux - where applicable, differences are noted in the text.

Pre-requisite:

KnowledgeTree Professional installed

Perform the following steps:

1. Use your text editor to open `{$INSTALLDIR}/apache2/conf/httpd.conf`.
2. Remove the # at the start of the line:

```
#LoadModule ssl_module modules/mod_ssl.so
```
3. Restart the dms services:
 - Windows users: via the **Start** menu
 - Linux users: via **dmsctl.sh** script
4. Connect via your Web browser (using **https://xxxxxxx/**)

Important: Linux Users

If you are using Linux, you **MUST** start the server as **ROOT** to allow Apache to bind to port **443**. To do this, you may need to install KnowledgeTree as the root user so that the configuration files are assigned the correct permissions.

6.3.4.2 Installing KnowledgeTree Tools (KTtools) for Windows



This procedure installs **KnowledgeTree Tools (KTtools)** on your Windows computer.

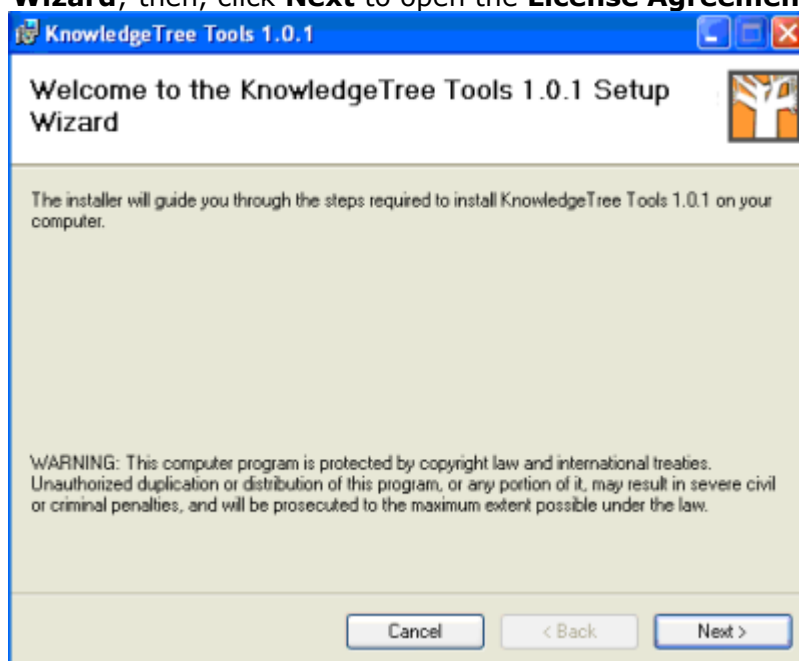
Prerequisites:

- KnowledgeTree Document Management System - Professional edition (installed)
 - Microsoft .NET Framework (installed)
- Note:** If you don't have .NET Framework installed, KTtools Installer points you to the .NET Framework download page.
- Old versions of KTtools removed from the computer you're installing to.
 - If you want to use Windows Explorer WebDAV, you must have installed the Web folders update from <http://support.microsoft.com/?kbid=892211>

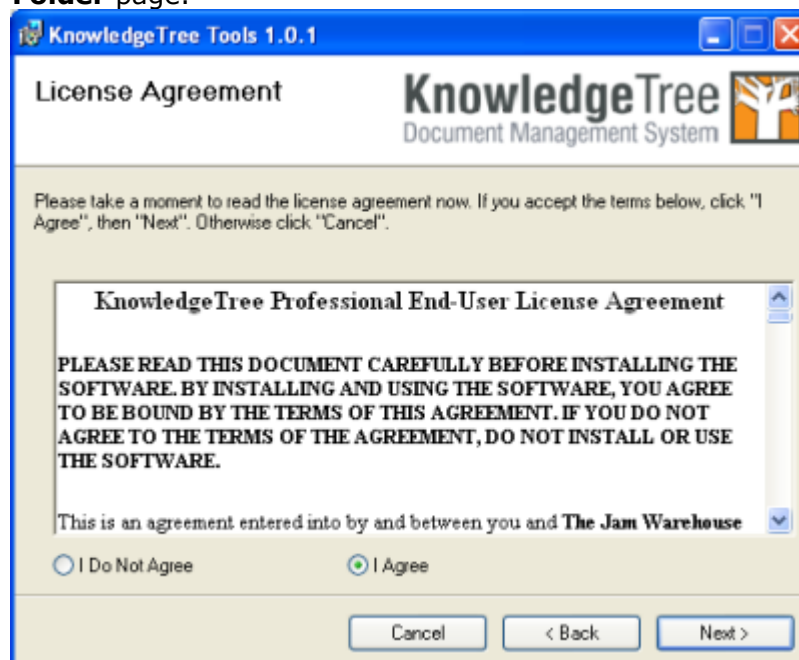
Note: KnowledgeTree Tools for Windows (**KTtools**) is only available to licensed users of **KnowledgeTree Professional**. For more information or purchase inquiries, visit www.ktdms.com.

Perform the following steps:

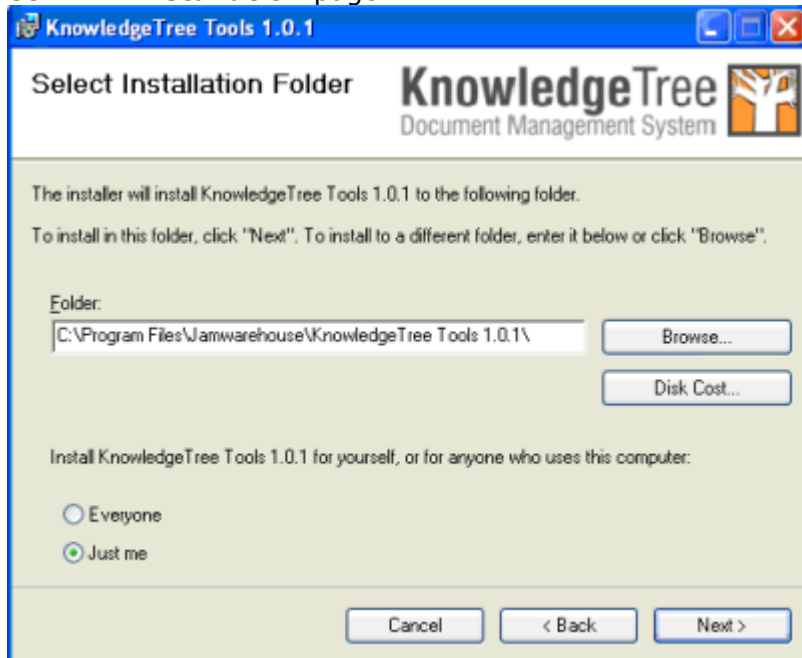
1. Locate the latest version of the KnowledgeTree Tools Installer Package on the **Download** page at <http://download.ktdms.com>.
2. Click on the file to open the **Welcome** page of the **KnowledgeTree Tools Setup Wizard**; then, click **Next** to open the **License Agreement**.



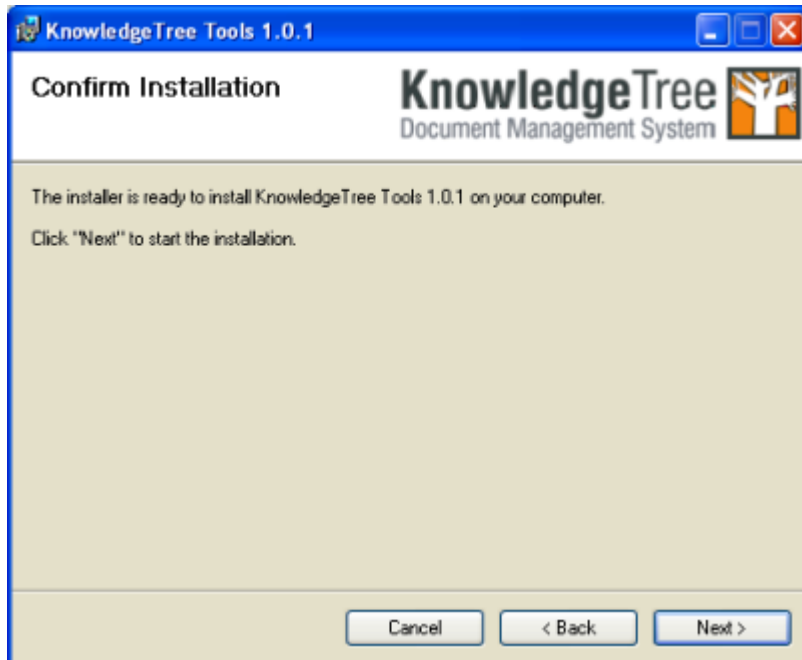
3. Select the **I Agree** radio button; then, click **Next** to open the **Select Installation Folder** page.



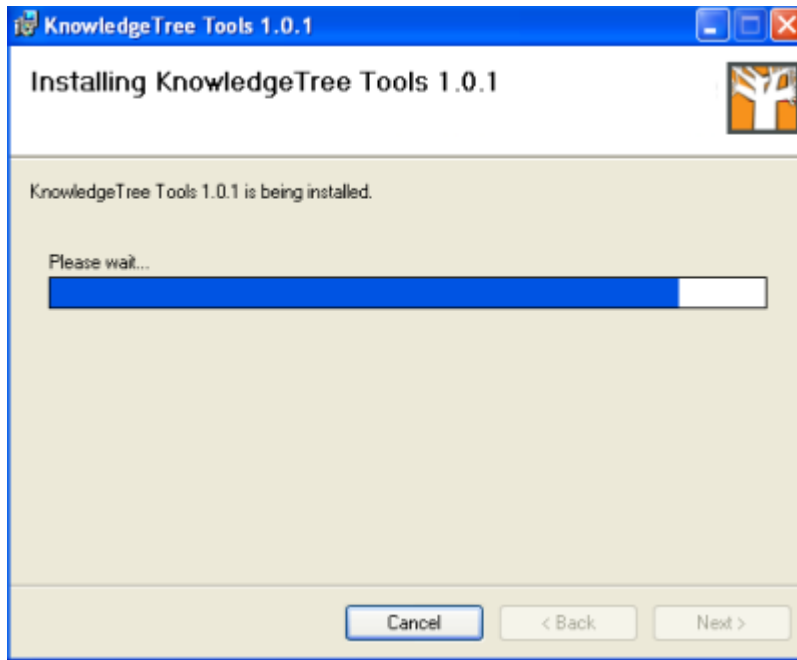
4. Accept the default folder for the installation or click **Browse** to select another location; then, select either **Everyone** or **Just me** to define who will be allowed to access KTtools on the computer you're installing to. Click **Next** to open the **Confirm Installation** page.



5. Click **Next** to start the installation.



6. View the installation progress on the **Installing** progress page



7. Click **Close** on **Installation Complete**.

Note: Setup places the KnowledgeTree Explorer icon on your desktop, and it inserts a menu item in your **Start** menu.

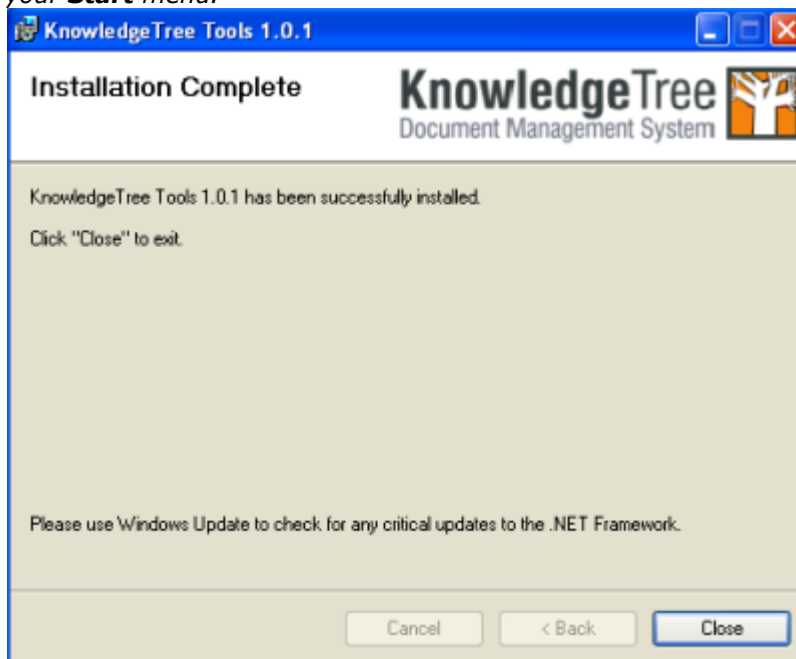


Figure: KnowledgeTree Explorer desktop icon

7. [Allocate license keys](#) - in the **DMS Administration** section of KnowledgeTree Document Management System. Only users with valid licenses are able to access KnowledgeTree log to KnowledgeTree Explorer.

8. [Configure a connection](#) with KnowledgeTree Explorer.

Note: You should only be required to configure the connection where you are performing a new install of KnowledgeTree Professional Explorer and KnowledgeTree Tools (KTtools). Typically, the upgrade installers save the information from the previous connection you configured and does not remove it during upgrade.

9. **Do you want to ...**

9.1. **work with KnowledgeTree Tools?** Open KnowledgeTree Explorer.

9.2. **find out more about working within KnowledgeTree Explorer?** Go to [Using KnowledgeTree Client Tools for Windows](#).

6.3.4.2.1 Configuring Connections with KnowledgeTree Explorer: Add New / Test / Remove



This procedure configures a connection to KnowledgeTree Explorer.

Note: Configuring a connection with the Web-based KnowledgeTree DMS allows users with valid KnowledgeTree Professional licenses to log in to KnowledgeTree Document Management System via the KnowledgeTree Integration Server, and it loads the file and folders from the repository into KnowledgeTree Explorer.

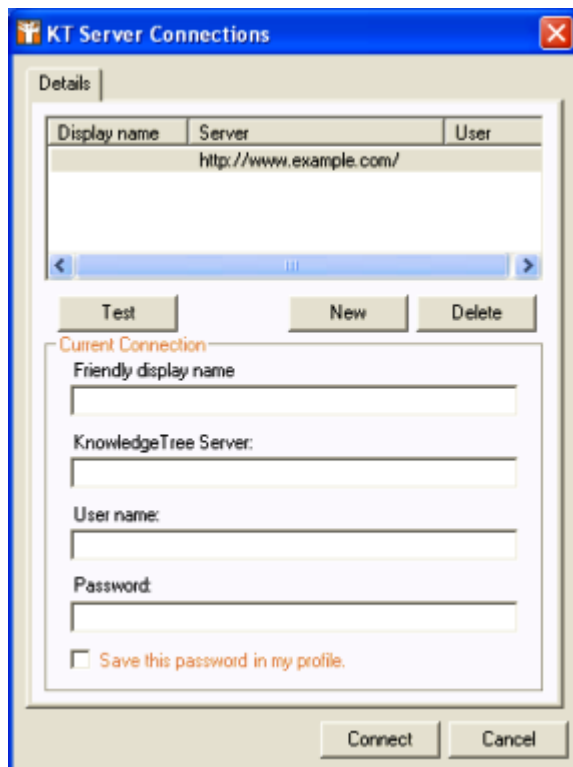
Note: You should only be required to configure the connection once, usually the first time you load KnowledgeTree Tools (KTtools) - i.e. after install or upgrade. Typically, the upgrade installer saves the information from the previous connection you configured and does not remove it during upgrade. Users will also see this dialog if their passwords weren't saved; in this case the user has to re-enter their password in KT Server Connections before connecting.

Perform the following steps:

1. Open KnowledgeTree Explorer from the desktop icon, or from the **Start** menu.

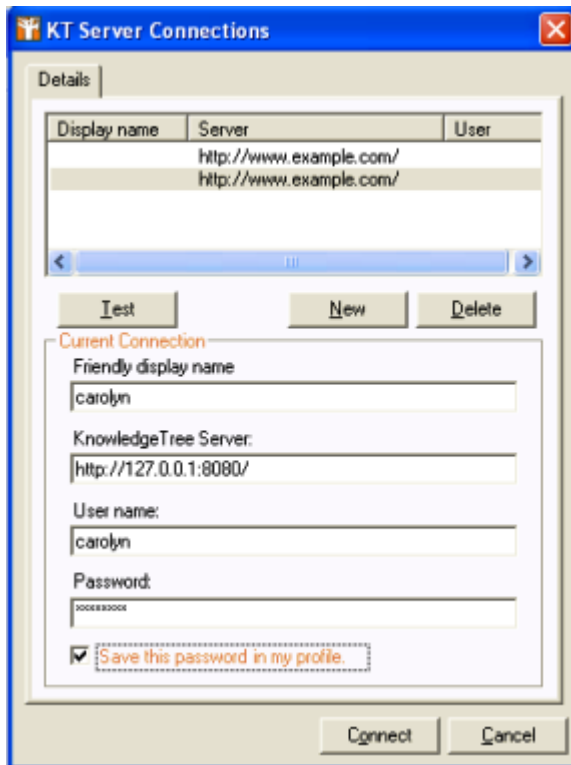
Note: See *Opening KnowledgeTree Explorer* for step-by-step instruction.

2. The **KT Server Connections** dialog box opens.

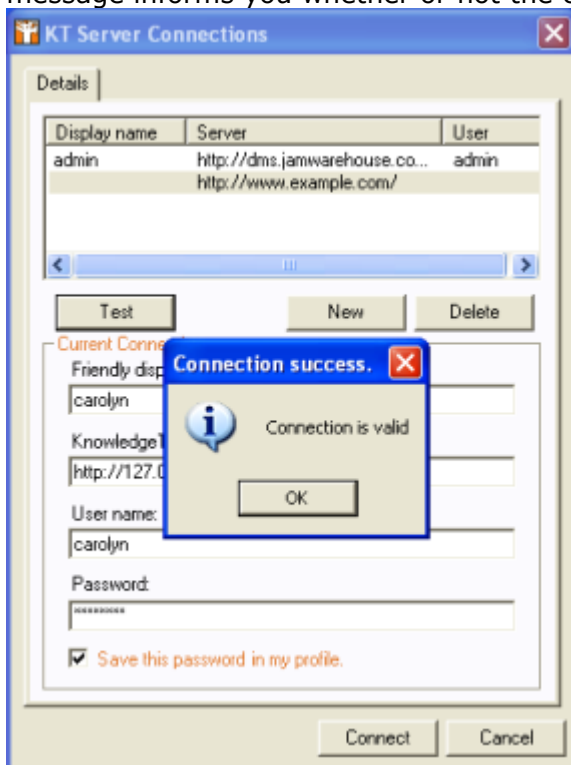


3. Do you want to...

- **configure a new connection?** Click **New**. Enter connection details: display name, full URL to your KnowledgeTree installation (the server address e.g. <http://www.testsite.com/kt3test>), user name, password; then, click **Test** to find out whether the connection is valid (see below). If the connection is valid, click **Connect**.



- **test a connection?** Select the connection to test. Click **Test**. A system message informs you whether or not the connection is valid.



- **remove an existing connection?** Select the connection in the **Details**

section; then, click **Delete**.

6.3.4.2.2 KTtools - Unattended Installation



This section describes the silent (unattended) installation of **KnowledgeTree™ Tools for Windows (KTtools)**.

A silent installation runs unattended - there is no requirement for monitoring or dialog box input, and there is no installation wizard.

You can run the silent installation in either one of the following ways:

- use the **MSIEXEC** command from the command line interface, or;
- incorporate the **MSIEXEC** command into a batch file.

The batch file can also be used to combine a silent installation with a pre-populated configuration file.

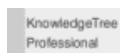
You can use the silent installation method to ensure consistent configuration if you are installing KTtools for Windows on multiple computers with identical hardware. You can also place a silent installation package on a file server for distribution over a network.

Because KTtools for Windows is based on the **Microsoft Windows Installer** technology, it can be deployed using **Active Directory** and **Group Policy**. For more information on deploying KTtools for Windows using Group Policy, refer to the Microsoft online help for your version of Windows.

What do you need to do?

- [Silent **install** of KTtools](#)
- [Silent **uninstall** of KTtools](#)

6.3.4.2.2.1 Performing a Silent Install of KTtools for Windows



use the **MSIEXEC** command to perform a silent installation of **KTtools for Windows** from the command line.

Note: For more information about the **MSIEXEC** command, refer to Microsoft documentation.

The following is an **example** of installing KTtools for Windows using the **MSIEXEC** command for a silent installation. Explanations of the parameters follow the example.

Note: In this instruction, **1.0.msi** indicates the file version - replace with your file version number if later than 1.0

Command

```
msiexec /i "c:\KTtoolsVersions\KTtoolsSetup-1.0.msi"  
/qn /l*v "c:\KTtoolsInstall_log.txt"
```

/i

Specifies an installation.

```
"C:\KTtoolsVersions\KTtoolsSetup-1.0.msi "
```

Specifies the complete path to the KTtools for Windows package. It will have an .msi extension.

/qn

Specifies that this is a silent install.

```
/l*v " C:\KTtoolsInstall_log.txt "
```

Specifies verbose logging and the name and location of the installation log file.

6.3.4.2.2.2 Performing a Silent Uninstall of KTtools for Windows



You can perform a silent uninstall of KTtools by using the **/x** parameter, instead of the **/i** parameter for each command.

All other parameters remain the same.

The following is an **example** of silently uninstalling KTtools using the MSIEEXEC command.

Note: In this instruction, **1.0.msi** indicates the file version - replace with your file version number if later than 1.0

Command

```
msiexec /x "c:\KTtoolsVersions\KTtoolsSetup-1.0.msi"  
/qn /l*v "c:\KTtoolsInstall_log.txt"
```

6.3.4.3 Troubleshooting

Browser does not display KnowledgeTree

If you get a browser error, do the following:

1. Ensure that Apache and MySQL are running.
2. Uninstall KnowledgeTree; then, reinstall. Ensure that you are providing the correct path, database, and password information.

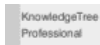
3. Check the community websites for known issues, FAQ's, etc. at <http://www.ktdms.com>

System message informs you of fatal error in dispatcher.inc.php

To resolve this, do the following:

1. Ensure that MySQL is running.
2. Ensure that the 'dbPort' parameter in config.ini is correct.

7 Using KnowledgeTree Client Tools for Windows



KnowledgeTree™ Client Tools for Windows (KTtools) allows you to:

- open files within the KnowledgeTree file repository, using the KnowledgeTree Explorer and Windows Explorer, and still retain control of document versions and metadata.
- copy files or entire folder trees from or to the repository, using your operating system's 'drag and drop' functionality.
- control all aspects of a document, including workflow, directly from your desktop.
- browse, check out, or check in KnowledgeTree managed documents from within Microsoft Office XP/2003 applications, using an easy to use Office Toolbar plug-in.

Note: Only users of **KnowledgeTree Professional** have access to **KTtools**. **KnowledgeTree Professional** is available for purchase from the KnowledgeTree website.

<http://www.ktdms.com/>

7.1 Working in KnowledgeTree Explorer



KnowledgeTree™ Client Tools for Windows (KTtools) provides you with access to a familiar Windows Explorer-type view of the KnowledgeTree Document Management System, where you can work with content in the Web-based DMS as though you're working on your local computer.

For more information about working with content in the repository using KnowledgeTree Tools (KTtools), see the **KnowledgeTree User Manual**.

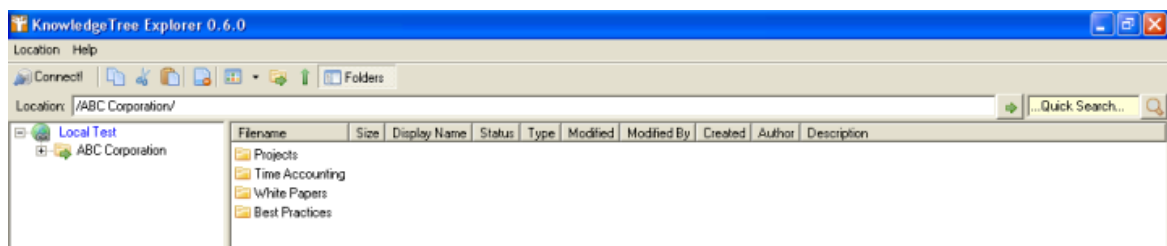


Figure: KnowledgeTree Explorer Interface

8 Inside the DMS

8.1 Dashboard

When accessing KnowledgeTree™ Document Management System via the Web interface, the system opens at the **Dashboard**.



Note: KnowledgeTree Professional license holders can login to the KnowledgeTree Document Management System via KTIS, where you can use KTtools to work with content in the repository from within [KnowledgeTree Explorer](#). This provides a familiar environment. This provides a view of the repository from allows you to work with content in the repository use KTtools to work within the KnowledgeTree Document Management System from within the KnowledgeTree Explorer, where they can use **KTtools** to access and work with content in the repository as though you're working on your local computer. For more information about **KnowledgeTree Professional** visit <http://www.ktdms.com>. You can also find out more about using KTtools in the **KnowledgeTree User Manual**.

The Dashboard provides tabs for accessing various sections of the KnowledgeTree Document Management System:

- [Browse Documents](#) - use this tab to enter the folder structure
- [DMS Administration](#) - this tab only displays when you're logged in as an administrator. You use this tab to access functionality for managing the KnowledgeTree Document Management System.
- Preferences - use this tab to define or edit your details.
- Logout - use this button to close your current working session, and to exit the system

Note: See the **KnowledgeTree User Manual** for more information about **Browse Documents** and **Preferences**.




Welcome to KnowledgeTree 3.0

KnowledgeTree is a commercial open source, web-based Document Management System. KnowledgeTree allows you to move away from uncontrolled and unaudited shared network drives to an environment which encourages knowledge sharing and meets regulatory requirements.

KnowledgeTree provides:

- ◆ A central document repository with audited document content version control
- ◆ Powerful document metadata management and versioning
- ◆ Sophisticated document authoring management and workflow
- ◆ Full-text indexing technology allowing search within document contents
- ◆ Powerful security group and role-based security model and integration with Directory Servers.

Items that require your attention

 No items require your attention.

Indexer Status

Mime Types	Diagnostic
Word Document	Unable to find required command for indexing. Please ensure that catdoc is installed and in the KnowledgeTree Path. For more information on indexers and helper applications, please visit the KTDMS site .

Figure: The Dashboard - Administrator's view

8.1.1 Dashboard Features

KnowledgeTree™ Document Management System uses your login credentials to determine the items that display on the **Dashboard** for your working session.

The Dashboard may display a list of the documents you have currently checked out, with a link to their source location in the repository. If you have notifications set up on specific folders, alerts inform you when documents or folders have been added, checked in, deleted, and so on, at that location.

The Dashboard also provides a **News** section, **Quick links** to frequently used items (e.g. a telephone list, or some other frequently used documents), and direct access to KnowledgeTree's search function.

Additionally, the Dashboard lists your orphaned folders (if any), and provides a direct link to these folders in the repository.

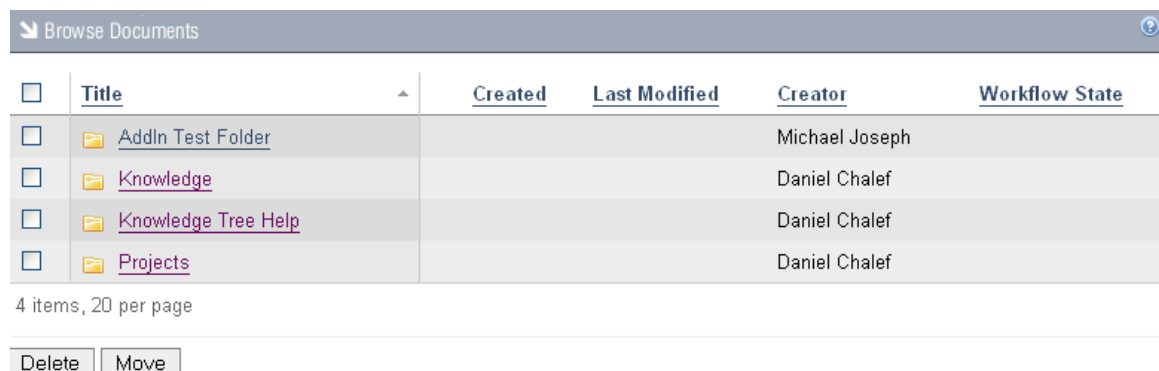
Note: *Orphaned folders are sub folders of parent folders where you do not have the appropriate view or other permissions. You have permissions for accessing the orphan folder, but you are not allowed to access the parent folder. You need direct access to the orphaned folder via the Dashboard, because you do not have permissions to navigate to the folder through its' parent folder.*

8.2 Browse Documents

The **Browse Documents** section of the DMS contains the KnowledgeTree™ content repository. Any user who has permissions to access the KnowledgeTree will be able to view and work with documents and folders in the repository (depending on the permissions they have for viewing and working with specific folders and documents).

You can click on a folder to view its contents, or to drill down further into the KnowledgeTree folder structure.

Note: A **KnowledgeTree Professional** license allows you to use **KTtools** to access and work with content in the repository as though you're working on your local computer. For more information about **KnowledgeTree Professional** visit <http://www.ktdms.com>. You can also find out more about using **KTtools** in the **KnowledgeTree User Manual**.



The screenshot shows a 'Browse Documents' window with a table of folders. The table has columns for Title, Created, Last Modified, Creator, and Workflow State. There are four rows of folders: 'AddIn Test Folder', 'Knowledge', 'Knowledge Tree Help', and 'Projects'. Below the table, it says '4 items, 20 per page' and there are 'Delete' and 'Move' buttons.

<input type="checkbox"/>	Title	Created	Last Modified	Creator	Workflow State
<input type="checkbox"/>	AddIn Test Folder			Michael Joseph	
<input type="checkbox"/>	Knowledge			Daniel Chalef	
<input type="checkbox"/>	Knowledge Tree Help			Daniel Chalef	
<input type="checkbox"/>	Projects			Daniel Chalef	

4 items, 20 per page

Delete Move

Figure: The Folder View in Browse Documents

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

You can access the following functionality in Browse Documents:

- work with folders
- work with documents
- search
- browse the repository
- use subscriptions

Note: For more information on **Browse Documents**, see the KnowledgeTree User Manual.

8.2.1 Editing Folder Permissions

By default, the permissions that are granted to the parent folder are passed down to the child folders (inherit permissions).

KnowledgeTree™ allows you to override the permissions of the parent folder in order to define a custom permissions set for the child folder. In this case, when subsequent changes are made to the parent folder permissions, those changes are no longer passed on to the child folder, unless you reinstate the **inherit permissions** feature.

Note: Typically, only the administrator is allowed to edit permissions on folders in KnowledgeTree, but users may also be granted permissions to do so.

Perform the following steps:

1. Login; then, click **Browse Documents** to enter the folder structure.
2. Search or navigate to the folder where you want to edit permissions.

3. Click **Permissions** in the **Folder Actions** menu to open the **Folder permissions** page.
4. **Does this folder use inherited permissions, and you want to override those permissions?**
 - **Yes.** Click **Override Permissions** to update permissions for this folder.
*Note: A system message in the grey bar above the table of permissions advises that this folder now defines its own permissions. To cancel this action, click **Inherit permissions**.*
 - **No.** Go to step 5.
5. **Does this folder define its own permissions and you want to...**
 - **reinstate the parent permissions?** Click **Inherit permissions**. A system message asks you if you want to 'delete this item' (this refers to the child folder permissions that you may or may not have changed after you overrode the parent permissions); click **OK**.
 - **change the permissions currently displayed in the table?** Click **Edit Permission Assignments** to open an editing view of the **Folder permissions** page (see Figure below). Select the check boxes to define permissions for the folder; then, click **Update Permission Assignments**.

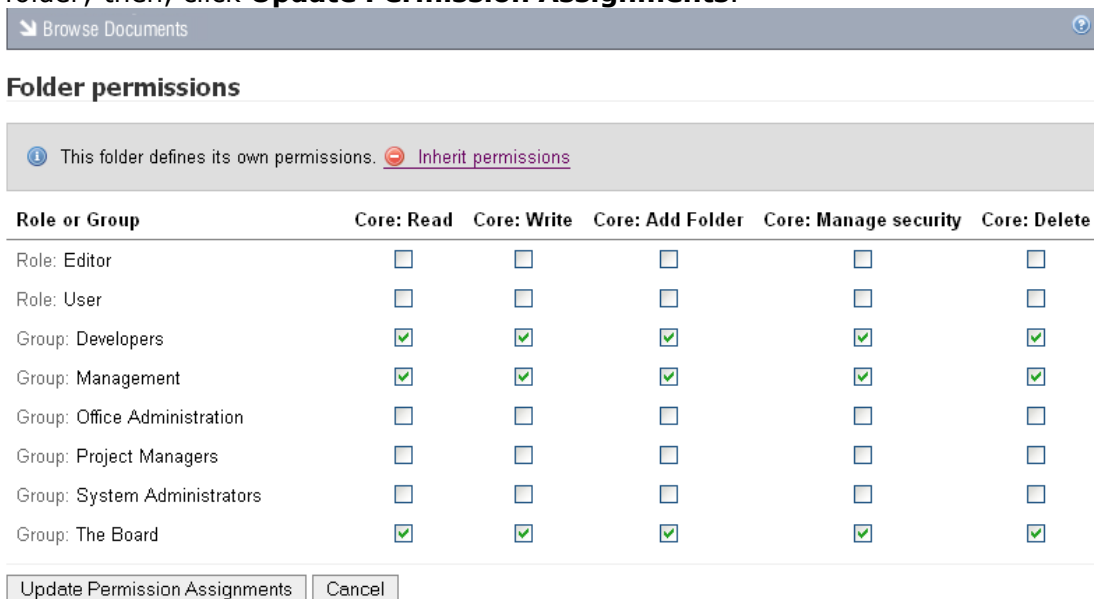


Figure: Editing view of the Folder permissions page

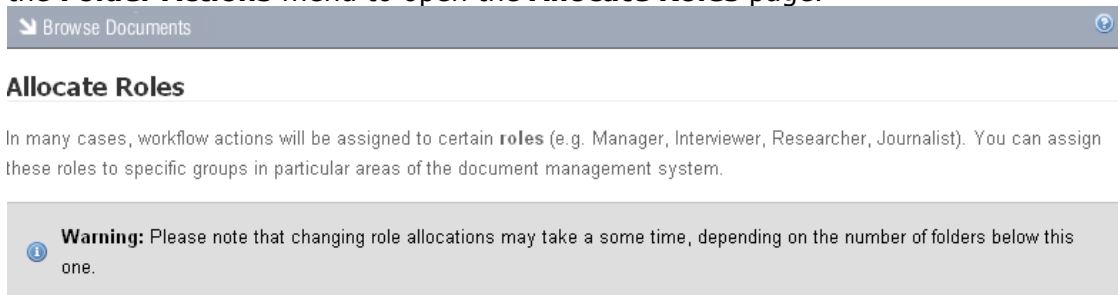
8.2.2 Allocating / Editing Roles

KnowledgeTree™ allows you to grant permissions to the role, and then to allocate the role to one or more groups so that the group is granted the permissions of the role.

Although child folders typically inherit the role permissions of the parent folder, you can override the inheritance of role allocations in order to define custom role allocations for the child folder. You can also reinstate the role allocations of the parent folder at any time.

Perform the following steps:

1. Login; then, click **Browse Documents** to enter the folder structure.
2. Locate the folder where you want to allocate roles; then, click **Allocate Roles** in the **Folder Actions** menu to open the **Allocate Roles** page.



Role	Allocated users	Edit Groups	Use Parent
Editor	inherited from parent folder. Groups: no groups	Override Parent Allocation	
User	Groups: no groups		

Figure: The Allocate Roles page

3. Do you want to...

- **remove the parent allocation for a role where this still exists?** Click **Override Parent Allocation** for the relevant role.
Note: This creates a new, editable, role allocation. (see Figure above).
- **reinstate the parent allocation for a role where this has previously been removed?** Click for the relevant role. Click **OK** in the system message that asks you to verify the replacement of currently defined role allocation. View the system message confirming that the role has reverted to the parent allocation.
- **edit permissions for a role where the parent allocation has been removed?** Click for the relevant role, to open the **Allocate Groups to Role** page. Select groups - one or more - in the **Available Groups** menu to populate the **Member groups** field. Enter criteria in the **Filter** fields (i.e. type a letter, or a word, or the first part of a word, to allow the system to display those groups names that contain this criteria, at the top of the display field - this is useful where you have very many groups and you want to find relevant groups fast). Click **save changes**.
Note: To select two or more Available Groups, hold down the keyboard Ctrl key while selecting groups; then, to populate the Member groups field, you can either double click on your selection or use the right pointing arrow. To remove items from the Member groups field, select the group you want to remove then either double click or use the left pointing arrow key.

Allocate Groups to Role

Groups must be allocated to roles to ensure that the workflow transition this role is supposed to support can be acted upon by a user.

Allocate Groups to Role

Select the groups which should be part of this role.

Available Groups		Member groups
<ul style="list-style-type: none"> Developers Management Office Administration Project Managers System Administrators The Board 	<input type="button" value="»"/> <input type="button" value="«"/>	<ul style="list-style-type: none">
Filter <input type="text"/>		Filter <input type="text"/>
<input type="button" value="save changes"/> <input type="button" value="Cancel"/>		

8.2.3 Bulk Import / Bulk Export

KnowledgeTree's **Bulk Import** function is only available to an administrative user. This feature allows you to download the entire contents of a folder in one zipped file. You can save the zipped file to your computer where you can open it to view all the files you downloaded.

Note: *Bulk Export* is only available if you have the required permissions.

Perform the following steps:

1. Login; then, click **Browse Documents** to enter the folder structure.
2. Search or browse to locate the folder where you want to download bulk content.
3. Click **Bulk Export** in the **Folder Actions** menu.
Note: *This menu item won't display if you do not have permissions for this action on the folder.*
4. A system dialog displays where you can choose to open the zipped file, or to save it to your computer. Once you have made your selection, click **OK**.

8.2.3.1 Working with Folders

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

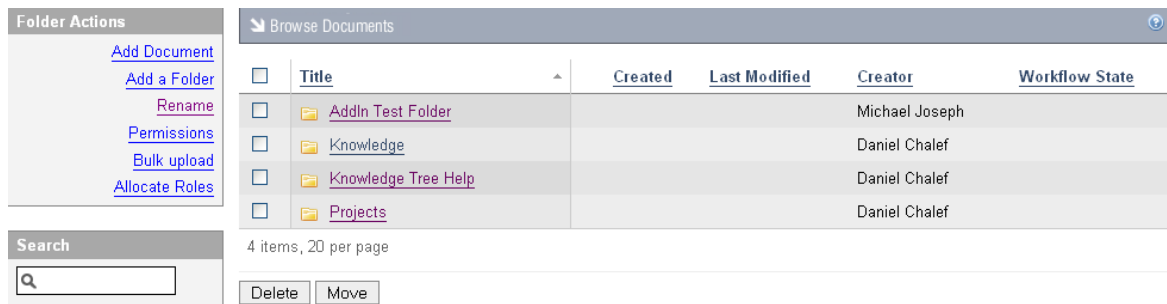


Figure: Folder Actions Menu

8.2.4 Bulk Upload

KnowledgeTree's **Bulk Upload** function allows the upload of multiple documents to the repository, by placing the documents in a zipped folder prior to upload.

If you require Bulk Upload capability for your installation, you need to enable it in `admin>>misc>>plugin management`

You also need to have **UnZip** installed on the KnowledgeTree server in order to use Bulk Upload.

Note:

Windows: <http://www.info-zip.org/>

Unix / Linux: `unzip`

8.2.5 Working with Documents

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

For more information, please refer to the **KnowledgeTree User Manual**.

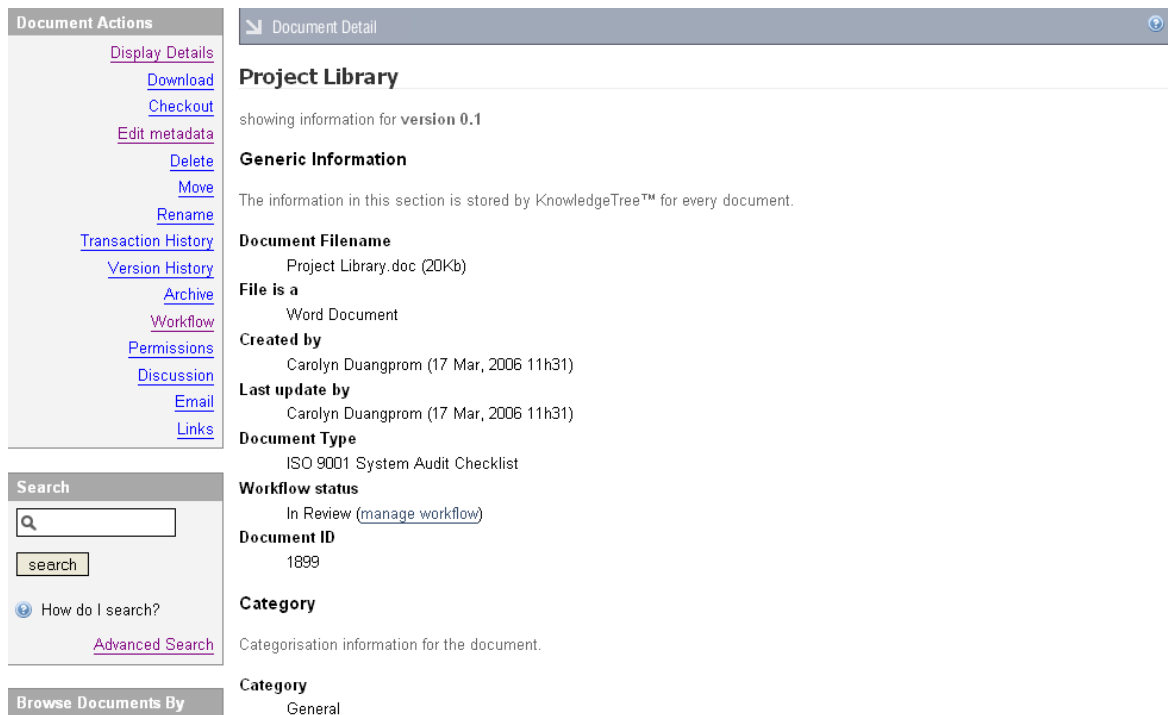


Figure: The Document Actions Menu - Display Details open

8.3 DMS Administration

Administrators use the functionality on the **DMS Administration** tab to manage the KnowledgeTree.

The DMS Administration section in **KnowledgeTree Open Source** contains the following sections:

- [Users and Groups](#)
- [Security Management](#)
- [Document Storage](#)
- [Document Metadata and Workflow Configuration](#)
- [Miscellaneous](#)

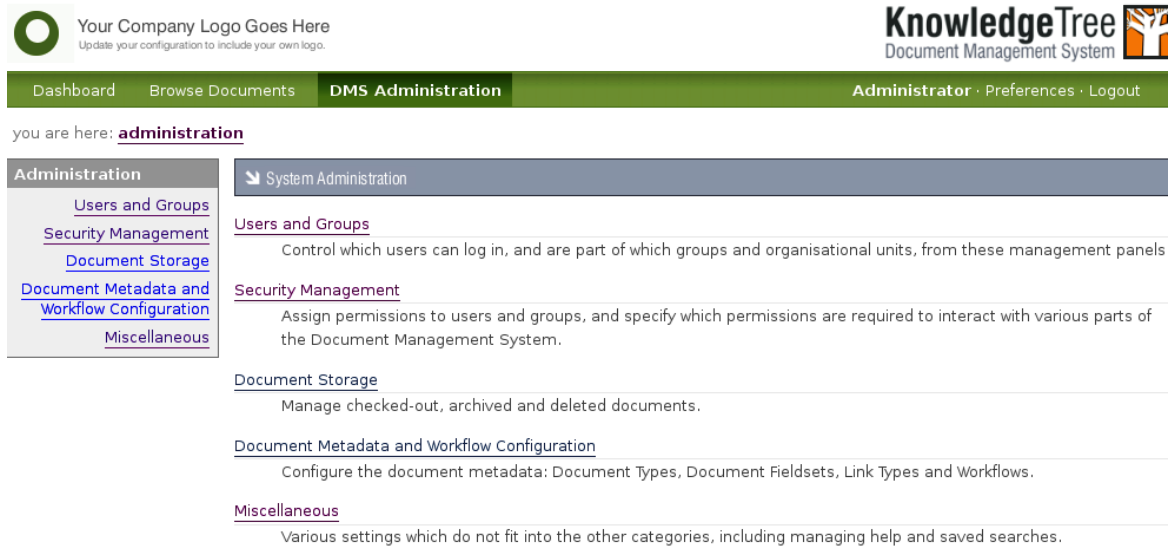


Figure: KnowledgeTree Open Source view of System Administration Main Page

The DMS Administration section in **KnowledgeTree Professional** includes the following **additional** sections:

- [Reporting](#)
Note: *You need to allocate license keys to make the Reporting module available and visible to users of KnowledgeTree Professional.*

- [KTIS Administration](#)
Note: *When upgrading from KnowledgeTree Open Source to KnowledgeTree Professional using the KnowledgeTree Professional Upgrade Installer, you need to reread the plugins list to view the KTIS section of DMS Administration.*

Note: *These sections are only available to users of KnowledgeTree Professional. For more information about KnowledgeTree Professional, visit <http://www.ktdms.com/>*

you are here: **administration**

Administration

- [Users and Groups](#)
- [Security Management](#)
- [Document Storage](#)
- [Document Metadata and Workflow Configuration](#)
- [Miscellaneous](#)
- [Reporting](#)
- [KTIS Administration](#)

System Administration

- [Users and Groups](#)
Control which users can log in, and are part of which groups and organisational units, from these management panels.
- [Security Management](#)
Assign permissions to users and groups, and specify which permissions are required to interact with various parts of the Document Management System.
- [Document Storage](#)
Manage checked-out, archived and deleted documents.
- [Document Metadata and Workflow Configuration](#)
Configure the document metadata: Document Types, Document Fieldsets, Link Types and Workflows.
- [Miscellaneous](#)
Various settings which do not fit into the other categories, including managing help and saved searches.
- [Reporting](#)
Report on usage of KnowledgeTree
- [KTIS Administration](#)
Allocate keys to users, and manage the keys you have purchased.

Figure: KnowledgeTree Professional view of System Administration Main Page

8.3.1 Users and Groups

You use the **Users and Groups** section of **DMS Administration** to access the following functions:

- [Authentication](#)
- [Managing Users](#)
- [Managing Groups](#)
- [Controlling Units](#)

Users and Groups

Authentication

By default, KnowledgeTree controls its own users and groups and stores all information about them inside the database. In many situations, an organisation will already have a list of users and groups, and needs to use that existing information to allow access to the DMS. These **Authentication Sources** allow the system administrator to specify additional sources of authentication data.

Manage Users

Add or remove users from the system.

Manage Groups

Add or remove groups from the system.

Control Units

Specify which organisational units are available within the repository.

Figure: Users and Groups section in DMS Administration

8.3.1.1 Authentication

KnowledgeTree™ allows you to control access to the DMS for the users and groups in its database, using KnowledgeTree's own default authentication method - **Database Authentication**.

However, KnowledgeTree also allows you to [add external authentication sources](#) where your organization maintains its own list of users and groups that require controlled access to the DMS.

You can also modify or delete the details of external authentication sources and authentication provider information.

Note: You need to add the credentials of each user to KnowledgeTree (see [Managing Users](#) and [Managing Groups](#)) to allow the system to retrieve their details, even if you're using an external authentication source.

8.3.1.1.1 Adding a New Authentication Source

This procedure adds a new external authentication source.

Perform the following steps:

1. Use your administrator login credentials to open **DMS Administration**; then click **Users and Groups** in the **Administration** menu to open the **Users and Groups** page.

Users and Groups

Authentication

By default, KnowledgeTree controls its own users and groups and stores all information about them inside the database. In many situations, an organisation will already have a list of users and groups, and needs to use that existing information to allow access to the DMS. These **Authentication Sources** allow the system administrator to specify additional sources of authentication data.

Manage Users

Add or remove users from the system.

Manage Groups

Add or remove groups from the system.

Control Units

Specify which organisational units are available within the repository.

2. Click the **Authentication** link to open the **Authentication Sources** page.

Authentication Sources

By default, KnowledgeTree controls its own users and groups and stores all information about them inside the database. In many situations, an organisation will already have a list of users and groups, and needs to use that existing information to allow access to the DMS. These **Authentication Sources** allow the system administrator to specify additional sources of authentication data.

 [Add a new authentication source.](#)

Authentication source	Edit	Edit Provider Information	Delete
Jam special			
TestersAuth			
Auth01_2500			

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

- **add a new authentication source?** Click **Add a new authentication source** to open the **Add an authentication source** page; then, go to step 4.
- **edit an existing authentication source?** Go to Editing / Deleting Authentication Sources.
- **edit authentication provider information?** Go to Editing / Deleting Authentication Sources.
- **remove an existing authentication source?** Go to Editing / Deleting Authentication Sources.

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

5. Select the type of authentication source from the **Authentication Provider** pick list.

Note: By default, this pick list contains the standard options - **LDAP Authentication**, and **Active Directory Authentication**. You can add additional authentication sources to this list. Check the KnowledgeTree community forums at www.ktdms.com for developer information.

The screenshot shows a web interface for adding an authentication source. At the top, there is a blue header bar with a white arrow icon and the text 'System Administration'. Below this is a section titled 'Add an authentication source'. The form contains two main fields: 'Name' and 'Authentication provider'. The 'Name' field is a text input containing 'Auth01_2500'. The 'Authentication provider' field is a dropdown menu with 'LDAP Authentication' selected. At the bottom of the form is a button labeled 'Add a new source'.

6. Click **Add a new source** to open the **Source Created** page. Complete the fields on the page:

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

- Server name
- Base DN
- Search User
- Search Password
- Search Attributes
- Object Classes
- user account pass

8. Click **Save** to open the **Configuration Updated** page, where you can view the standard and provider configurations you defined.

System Administration

Configuration updated

Standard configuration

Name
Auth01_2500

Provider
LDAP authentication provider

[Edit standard configuration](#)

Provider configuration

LDAP Server
Unset

Base DN
Unset

LDAP Search User
Unset

LDAP Search Password
Unset

Search Attributes
cn
mail
sAMAccountName

Object Classes
user
inetOrgPerson
posixAccount

[Edit provider configuration](#)

9. Do you want to change any of the...

- **standard configuration details you defined?** Click **Edit standard configuration** to open the **Edit an authentication source** page, where you can change the name and/or the authentication provider. Click **Save** to update any changes you made.
- **provider configuration details you defined?** Click **Edit provider configuration** to open the page to reset any of the details. Click **Save** to

update any changes you made.

8.3.1.1.2 Editing / Deleting Authentication Sources

This procedure modifies or removes an existing authentication source.

Perform the following steps:


1. Use your administrator login credentials to open the **Users and Groups** page in DMS Administration.
2. Click **Authentication** to open the **Authentication Sources** page.



Authentication Sources




By default, KnowledgeTree controls its own users and groups and stores all information about them inside the database. In many situations, an organisation will already have a list of users and groups, and needs to use that existing information to allow access to the DMS. These **Authentication Sources** allow the system administrator to specify additional sources of authentication data.

 [Add a new authentication source.](#)

Authentication source	Edit	Edit Provider Information	Delete
Jam special			
TestersAuth			
Auth01_2500			

3. Find the authentication source you want to edit in the table at the bottom of the page.

4. Do you want to...

- **edit the authentication source?** Click  in **Edit** column to open the **Edit Authentication Source** page, where you can change the short name and/or the authentication provider. When you're done, click **Save**.
- **edit the provider details of the authentication source?** Click  in the **Edit Provider Information** column to open the editing page for the authentication provider, where you can reset any of the settings. When you're done, click **Save**.
- **delete the authentication source?** Click  in the **Delete** column. A system message asks you to confirm the deletion before removing the authentication source from the list.

8.3.1.2 Manage Users

You use the **Manage Users** section of **Users and Groups** to add or remove users from the KnowledgeTree™ Document Management System. You can also search for user details, or view a list of all the users that exist in the system.

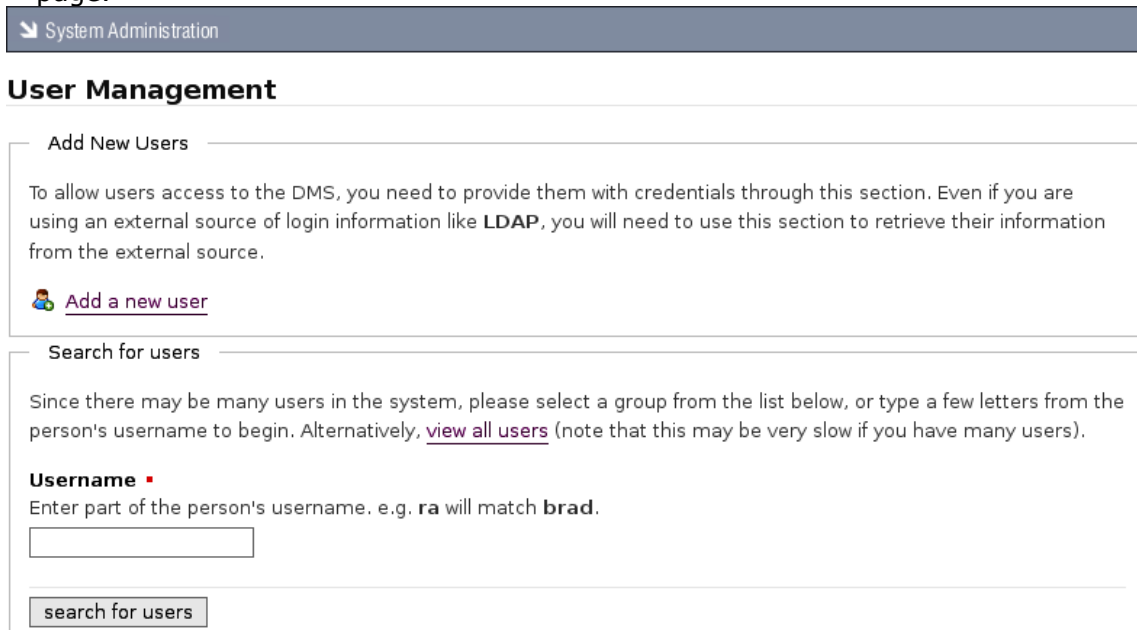
The system uses the information you specified when you added the user or group, to retrieve their details from the authentication source. This allows verification of the user or group's login rights, and of the permissions they have for accessing information in the repository.

8.3.1.2.1 Finding / Viewing User Details

This procedure allows you to search for specific users, or to view a list of all the users in the system.

Perform the following steps:

1. Use your administrator login credentials to open **Users and Groups** in **DMS Administration**; then, click **Manage Users** to open the **User Management** page.



System Administration

User Management

Add New Users

To allow users access to the DMS, you need to provide them with credentials through this section. Even if you are using an external source of login information like **LDAP**, you will need to use this section to retrieve their information from the external source.

[Add a new user](#)

Search for users

Since there may be many users in the system, please select a group from the list below, or type a few letters from the person's username to begin. Alternatively, [view all users](#) (note that this may be very slow if you have many users).

Username ▾
Enter part of the person's username. e.g. **ra** will match **brad**.

search for users

Figure: The User Management Page

2. Do you want to...

- **add new user information to the system?** Go to [Adding New Users](#).
- **search for information on existing users?** Go to step 3.

3. Do you know the name of the user?

- **Yes.** Enter the username - or part of the username - in the **Username** field; then, click **search for users** to display details for any user matching the criteria you specified.

- **No.** Click **view all users** to display a list of all system users.

Name	Username	Edit	Delete	Group Memberships	Current Groups
Administrator	admin			Manage Groups	System Administrators
Anonymous	guest			Manage Groups	Anonymous
Unit Administrator	unitAdmin			Manage Groups	Unit Administrators

Figure: View all users

8.3.1.2.2 Editing / Deleting Users

This procedure changes or deletes a user's details.

Perform the following steps:

1. Use your administrator login to open **Users and Groups** in **DMS Administration**; then, click **Manage Users** to open the **User Management** page.
2. Search for the user's details, or display a list of all system users. For more information about this procedure, go to **Finding/Viewing User Details**.

Name	Username	Edit	Delete	Group Memberships	Current Groups
Administrator	admin			Manage Groups	System Administrators
Anonymous	guest			Manage Groups	Anonymous
Jen Tait	jtait			Manage Groups	Unit Administrators
Unit Administrator	unitAdmin			Manage Groups	Unit Administrators

Figure: User Management Page: View all users

3. Do you want to...

- **edit user details?** click in the **Edit** column for the user you want to modify, to open the **Edit User Details** page. Change the user's details as required; then, click **save changes**.
- **delete a user's profile?** Click in the **Delete** column for the user you want to remove from the system.
Note: A system message informs you that the user has been deleted.
- **change a user's group membership profile?** Click the **Manage Groups** link for the user to open the **Change Groups** page for this user. Populate the **Assigned Groups** list from the options in the **Available Groups** list to define this user's group membership; then, click **save changes**.

8.3.1.2.3 Adding New Users

Users are created using KnowledgeTree's default authentication provider. When using an external authentication provider - such as LDAP - you need to ensure that the provider's plug-in is registered and enabled. For more information, see [Adding a New Authentication Source](#).

There are two ways to create new users:

- [from an external authentication source](#)
- [manually](#) within KnowledgeTree

8.3.1.2.3.1 Adding a User Manually

This procedure adds new users manually to the KnowledgeTree Document Management System.

Perform the following steps:

1. Use your administrator login credentials to open the **Users and Groups** page in **DMS Administration**; then, click **Manage Users** to open the **User Management** page.
2. Click **Add a new user** to open the **Add a user** page.



Add a user

Please complete the form below to add a new user. Fields marked with a red square are required. created using KnowledgeTree's builtin authentication provider. Should you wish to use an external such as LDAP, please ensure that the provider's plugin is registered and enabled.

Add a user from an authentication source

Instead of manually creating the user within the document management system, the user can authentication source (such as an LDAP directory) that has already been configured. This ensures correctly set up with limited intervention from the administrator, and that the user will not need additional password for the document management system.

TestersAuth

Add from source

Alternatively, you can manually create a user within KnowledgeTree below.

Create a new user

Figure: Add a user page

3. Are you creating the new user...

- **from an external authentication source that has *already* been configured for KnowledgeTree?** See [Adding a User From an External Authentication Source](#).
- **from an external authentication source that has *not* yet been configured for KnowledgeTree?** Perform the procedure for [adding a new authentication source](#) to enable the authentication provider's plug-in; then, return to this procedure to add the user from the external authentication source.
- **manually, within KnowledgeTree?** Go to step 4.

4. Type the user's login name in the **Username** field; then, type the user's full name in the **Name** field.

5. Type the user's email address in the **Email Address** field.

6. Do you want to enable notifications and alerts to be sent to the email address you specified in the *Email Address* field?

- **Yes.** Select the **Email Notifications** check box.
- **No.** Leave the **Email Notifications** check box de-selected.

7. Type the user's password in the **Password** field; then, re-enter the password in the **Confirm Password** field.

8. Type the user's mobile phone number in the **Mobile Number** field (if the system is configured to send notifications to cellphones).

9. In the **Maximum Sessions** field, define a maximum number of times you will allow this user to log in to the system without having used the **Logout** button to exit their working session.

Note: By default, the system logs you out automatically after a period of inactivity. When you login again, it re-opens the page where you ended your last working session. However, you will only be allowed to access the system without using the **Logout** button for the maximum number of times you set in this field. This is to prevent multiple users logging in on the same account.

10. Click **create user** to re-open the **User Management** page.

Note: A system message confirms that the new user has been added to the system.

8.3.1.2.3.2 Adding a User from an External Authentication Source

This procedures add a new users from an external authentication source.

Note: When using an external authentication provider - such as LDAP - you need to ensure that the provider's plug-in is registered and enabled. For more information, see [Adding a New Authentication Source](#).

Perform the following steps:

1. Use your administrator login credentials to open Users and Groups in **DMS Administration**; then, click **Manage Users** to open the **User Management** page.
2. Click **Add a new user** to open the **Add a user** page.
3. **Are you creating the new user...**
 - **from an external authentication source that has *already* been configured for KnowledgeTree?** Go to step 4.
 - **from an external authentication source that has *not* yet been configured for KnowledgeTree?** Perform the procedure for [adding a new authentication source](#) to enable the authentication provider's plug-in; then, return to this procedure to add the user from the external authentication source.
 - **manually, within KnowledgeTree?** Go to [Adding a User Manually](#).
4. Select the authentication source you want to use from the pick list in the **Add a user from an authentication source** section.
6. Click **Add from source** to open the **Search for user** page for the authentication source you selected.
7. Do one of the following:
 - Type part or all of the user's name in the **User's name** field; then, go to step 8.
 - Select the **Mass import** check box to add all users from the authentication source you specified; then, go to step 8.
Note: The system does not allow you to verify the details of each individual user that is included in the mass import.
8. Click **search for users**.

8.3.1.3 Manage Groups

Only a User that has been assigned to a **Group** is allowed to access the KnowledgeTree™ Document Management System.

When creating a new Group, you need to assign the Group to a **Unit** before users in that Group will be allowed to access the DMS.

Note: Groups can be members of other groups, and can have other groups as members. These memberships pass the permissions set on to the parent group to user members of the member groups, possibly along a few chains.

Example:

Let's say you create a new **Group** called *Testers*. Having created the group, you must assign the group (*Testers*) Group to a **Unit**, and you name the Unit '*Quality Assurance*'. So, the group named *Testers* is part of the unit *Quality Assurance*.

Group: *Testers*
 Unit: *Quality Assurance*

8.3.1.3.1 Finding / Viewing Groups

This procedure allows you to search for specific groups, or to view a list of all the groups in the system.

Perform the following steps:

1. Use your administrator login credentials to open **Users and Groups** in **DMS Administration**; then, click **Manage Groups** to open the **Group Administration** page.

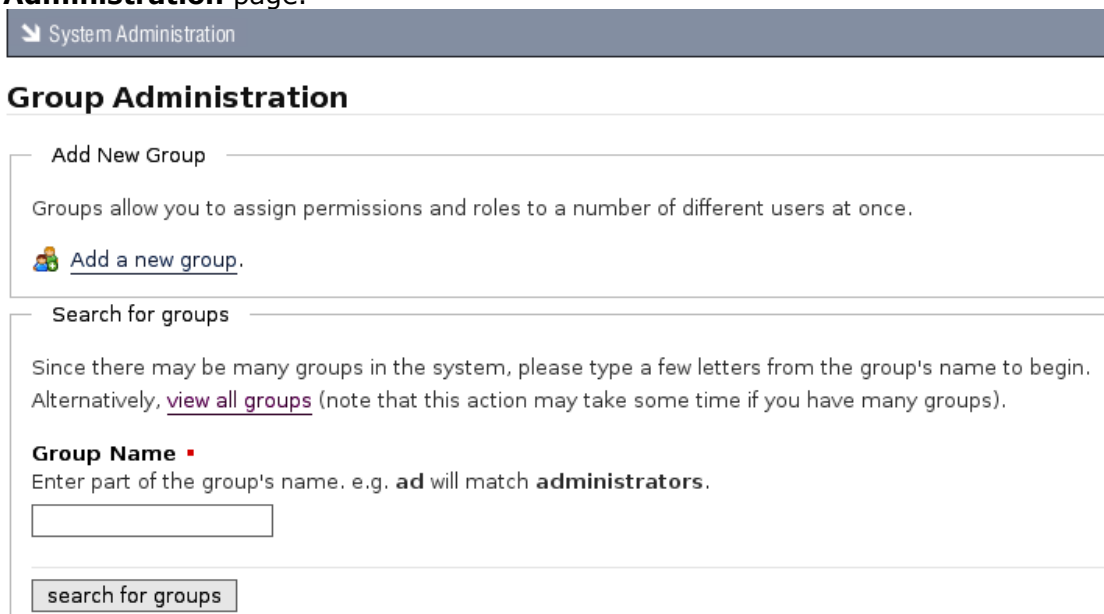


Figure: The User Management Page

2. **Do you know the name of the group?**
 - **Yes.** Enter part or all of the group name in the **Group Name** field; then, click **search for groups** to display details for any group matching the criteria you specified.
 - **No.** Click **view all groups** to display all groups.







Group Name	Unit Name	Edit	Delete	Manage Users	Manage sub-groups	Subgroups
Anonymous	not part of a unit			Manage Users	Manage sub-groups	Group currently has no subgroups.
System Administrators	not part of a unit			Manage Users	Manage sub-groups	Group currently has no subgroups.
Unit Administrators	Default Unit			Manage Users	Manage sub-groups	Group currently has no subgroups.

Figure: View all groups

8.3.1.3.2 Adding New Groups

This procedure creates a new group.

Creating a new group involves:

- naming the group
- deciding whether or not to assign administrative privileges to all group members

Perform the following steps:


1. Use your administrator login open the **Users and Groups** page in **DMS Administration**; then, click **Manage Groups** to open the **Group Administration** page.

[System Administration](#)

Group Administration

Add New Group

Groups allow you to assign permissions and roles to a number of different users at once.

 [Add a new group.](#)

Search for groups

Since there may be many groups in the system, please type a few letters from the group's name to begin. Alternatively, [view all groups](#) (note that this action may take some time if you have many groups).

Group Name ▪

Enter part of the group's name. e.g. **ad** will match **administrators**.

search for groups

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

you are here: [administration](#) » [users and groups](#) » [group management](#) (add a new group)

System Administration

Add a new group

Users may be classed together as Groups and these groups may be used to set security privileges throughout the document management system.

Specify group details

Please enter the Group's details below and then click **create group**. Fields marked with a red square are required.

Group Name ■
A short name for the group. e.g. **administrators**.

Unit Administrators
Should all the members of this group be given **unit** administration privileges?

System Administrators
Should all the members of this group be given **system** administration privileges?

Unit
Which Unit is this group part of?

Figure: Adding a group

3. Do you want to...

- **add a group from an authentication source?** Select the authentication source from the pick list in the **Add a group from an authentication source** section; then, click **Add from source**.
- **add a group manually from within KnowledgeTree?** Go to step 4.

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

5. **Do you want to assign unit administrative privileges to all members of this group?**

- **Yes.** Select the **Unit Administrators** check box.
- **No.** Leave the **Unit Administrators** check box de-selected.

6. **Do you want to assign system administration privileges to all members of this group?**

- **Yes.** Select the **System Administrators** check box.
- **No.** Leave the **System Administrators** check box de-selected.

7. Select the unit where this group belongs, from the **Unit** pick list.

8. Click **create group**.

Note: A system message informs you that the new group has been created.

8.3.1.3.3 Editing / Deleting Groups

This procedure changes or deletes a group.

Perform the following steps:

1. Use your administrator login to open **Users and Groups** in **DMS Administration**; then, click **Manage Groups** to open the **Group Administration** page.

2. Search for the group, or display a list of all groups. For more information about this procedure, go to **Finding/Viewing Groups**.





Group Name	Unit Name	Edit	Delete	Manage Users	Manage sub-groups	Subgroups
Anonymous	not part of a unit			Manage Users	Manage sub-groups	Group currently has no subgroups.
System Administrators	not part of a unit			Manage Users	Manage sub-groups	Group currently has no subgroups.
Unit Administrators	Default Unit			Manage Users	Manage sub-groups	Group currently has no subgroups.

Figure: Group Administration Page: View all groups

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

- **change the group's details?** click  in the **Edit** column for the group to open the **Edit Group Details** page. Change the group's details as required; then, click **save changes**.
- **delete a group?** Click  in the **Delete** column for the group.
Note: A system message informs you that the group has been deleted.
- **add or remove users in a group?** Click the **Manage Users** link for the group to open the **Manage Users in group** page. Populate the **Member users** list from the options in the **Available Users** list to define the users that belong to this group. When you're done, click **save changes**.
- **add or remove sub groups in a group?** Click the **Manage sub-groups** link for the group to open the **Manage Sub-Groups in group** page. Populate the **Assigned Groups** list from the options in the **Available Groups** list to define the groups that should be part of this group; then, when you're done, click **save changes**

8.3.1.4 Control Units

KnowledgeTree™ provides **Units** as a means of organizing groups. Units may be used to model your organization's business units.

A default Unit (Default Unit) is created during installation. By default, each time a new Unit is created on the system, a **Unit** folder is created in the **Organization** (root) directory.

8.3.1.4.1 Creating New Units

This procedure creates a new Unit.

Perform the following steps:

1. Use your administrator login credentials to open Users and Groups in **DMS Administration**; then, click **Control Units** to open the **Unit Administration** page.

System Administration

Unit Administration

KnowledgeTree allows administrators the ability to create **Units** that model the organisation's business units. Units may have their own administrators and groups may be assigned to these units.

Add New Unit

Units allow you to delegate the administration of a portion of the DMS repository to a particular part of your organisation. Unit administrators have additional rights within that portion of the document management system, and they can also adjust the membership of groups that belong to the unit.

[Add a new unit.](#)

Unit Name	Edit	Delete	Folder
Default Unit			Default Unit

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

System Administration

Add a new unit

Units allow you to delegate a portion of the document management system to a particular part of your organisation. Unit administrators have additional right within that portion of the document management system, and they can also adjust the membership of groups that belong to the unit.

Specify unit details

Please enter the Unit's details below and then click **create unit**. Fields marked with a red square are required.

Unit Name ■
A short name for the unit. e.g. **Accounting**.

3. Type the name for the new unit in the **Unit Name** field; then, click **Next** to open the next page of the **Add a new unit** page, where you can choose a folder location.

System Administration

Add a new unit

Choose unit folder location


Please choose a location to place your unit folder.

Unit Name ▪
A short name for the unit. e.g. **Accounting**.

Human Resources

Target folder
The folder given below is where the unit folder will be created. Use the folder collection and path below to browse to the folder you wish to create the unit folder into.
The unit administrators have additional

Title

 Default Unit

1 items, 20 per page


4. Drill down into the folder structure to select a folder location for the new unit; then, click **create unit**.


Note: The system re-opens the **Unit Administration** page, where a system message informs you that the new unit has been created. The list of units at the bottom of this page now includes the unit you added.

8.3.1.4.2 Viewing / Editing / Deleting Units

This procedure allows you to view the units that exist for your organization or to add new units. You can also use this procedure to modify existing units.

Perform the following steps:

1. Use your administrator login credentials to open **Users and Groups** in DMS Administration; then, click **Control Units** to open the **Unit Administration** page.
2. **Do you want to...**
 - **view the units that currently exist for your organization in KnowledgeTree?** See the table at the bottom of the page, which lists all the existing units and their folder locations.
 - **edit a unit?** Click  in the **Edit** column for the unit to open the **Edit Unit Details** page. Define a new short name for the unit in the **Unit Name** field; then, click **save changes to unit**.

- **delete a unit from the system?** Click  to permanently remove this unit from the system.
- **open the folder location where you saved this unit?** Click the link in the **Folder** column for the unit to navigate to the folder location.

8.3.2 Security Management

You use the **Security Management** function on the **Administration** menu in **DMS Administration** to:

- create or delete permissions
- create or delete roles
- define the criteria that will be used to determine whether or not a user is allowed to perform certain actions in the system

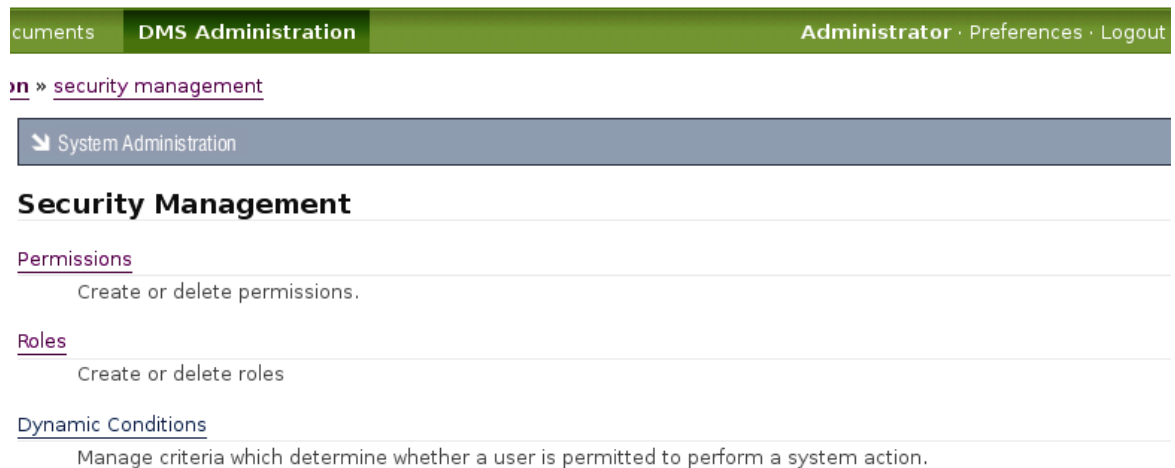


Figure: The Security Management Page in DMS Administration


8.3.2.1 Permissions

KnowledgeTree™ provides several [default \(core\) permissions](#) - **Read, Write, Add Folder, Manage Permissions, Delete** - but it also allows you to create your own permissions.

You can create permissions for controlling user and group access for plug-ins, or create permissions to use as **Guard Permissions** for workflow transitions.

This procedure allows you to view or delete existing permissions, or to define custom permissions for your organization.

Perform the following steps:

1. Use your administrator login credentials to open **DMS Administration**.
2. Click **Security Management** in the **Administration** menu to open the **Security Management** page.
3. Click **Permissions** to open the **Existing permissions** page.
4. **Do you want to...**
 - **view existing permissions?** Scroll down to the bottom of the page to view a list of existing permissions.
Note: KnowledgeTree's default permissions are displayed at the top of this list. These permission types cannot be deleted.
 - **add a new permission type?** Define a permanent name for the new permission type in the **System Name** field; then, define a short name in the **Display Name** field. Click **Create**.
Note: A system message informs you that the new permission has been created. View the list of permission types at the bottom of this page to see the new permission now added to the list of existing permissions.
 - **delete a permission type?** Click  in the **Delete** column for the permission type you want to remove.
*Note: You can only delete custom permissions. Having clicked the **Delete** icon, a system message informs you that the permission has been deleted. View the permission type list at the bottom of this page to confirm the removal of the permission type.*

System Administration

Existing permissions

Permissions are descriptors used to ascertain whether groups of users have access to certain functionality. The built-in permissions below facilitate the default functionality of the DMS and can't be changed. Plugin developers may choose to add additional permissions below that manage access to their plugins functionality.

Create a new permission

System Name •
The internal name used for the permission. This should never be changed.

Display Name •
A short name that is shown to users whenever permissions must be assigned.

Permission	Display Name	Delete
ktcore.permissions.read	Core: Read	Built-in
ktcore.permissions.write	Core: Write	Built-in
ktcore.permissions.addFolder	Core: Add Folder	Built-in
ktcore.permissions.security	Core: Manage security	Built-in
ktcore.permissions.delete	Core: Delete	Built-in

Figure: Existing Permissions page - create new permission

8.3.2.2 Roles

Roles in KnowledgeTree™ may include document creator, document reviewer, document publisher, or writer, editor, developer, secretary, and so on.



Workflow actions - e.g. *review*, or *publish* - are typically assigned to a specific role. The role is granted permissions for working with the document, based on the type of tasks their role performs - e.g. reviewers need read and write permissions.

User Groups are allocated to Roles on a per-directory basis, and are inherited from the root folder of the DMS.

8.3.2.2.1 Viewing / Adding / Editing / Deleting Roles

This procedure allows you to view, edit, or delete existing roles that have been set up for your organization within the KnowledgeTree Document Management System. It also allows you to create new roles.

Perform the following steps:

1. Use your administrator login credentials to open **DMS Administration**.
2. Click **Security Management** in the **Administration** menu to open the **Security Management** page.
3. Click **Roles** to open the **Role Administration** page.
4. **Do you want to...**
 - **view existing roles?** Scroll down to the bottom of the page to view a list of existing roles.
 - **edit an existing role?** Click  in the **Edit** column for the role to open the editing page. Change the role name; then, click **update role information** to save your changes.
 - **delete an existing role?** Click  in the **Delete** column for the role.
Note: A system message informs you that the role has been deleted. View the role list at the bottom of this page to confirm the removal of the role.
 - **add a new role?** Define a name for the role in the **Name** field; then, click **create new role**.
Note: A system message informs you that the new role has been created. View the list of roles at the bottom of this page to see the new role now added to the list of existing roles.

Role Administration

Workflow actions may be assigned to certain roles within the DMS. User groups are allocated to roles on a per-directory basis and are inherited from the root folder of the DMS. Roles may for example include "Document Creator", "Document Reviewer", "Document Publisher".

Add a Role

Name ▪
A short, human-readable name for the role.





Role Name	Edit	Delete
DocumentPublisher		
webadmin		

Figure 3: View existing Roles / Create new Roles

8.3.2.3 Dynamic Conditions

You use KnowledgeTree's **Dynamic Conditions** feature to set up the rules that will determine the permissions that may be applied to documents within a folder.

These rules may be applied to a document's metadata, to its contents, or to its transactional information.

Dynamic Conditions are applied on a per folder basis, and may be set up in the folder's **Folder permissions** page.

Note: *Dynamic Conditions are configured in the same way as Saved Searches.*

Note: *Having defined a dynamic condition, you cannot delete it because that may change permission assignments.*


Having created a new dynamic condition, you need to assign it to a folder. You can also unassign dynamic conditions when they're no longer useful for the folder.

8.3.2.3.1 Viewing / Adding / Editing / Dynamic Conditions

This procedure creates a new dynamic condition.

Perform the following steps:

1. Use your administrator login credentials to open **DMS Administration**; then, click **Security Management** in the **Administration** menu to open the **Security Management** page.

-
2. Click **Dynamic Conditions** to open the **Dynamic Conditions** page.
 3. **Do you want to...**
 - **view existing dynamic conditions?** View the list of existing dynamic conditions displayed at the bottom of this page.
 - **edit the details of an existing dynamic condition?** Click  in the **Edit** column for the condition you want to modify, to open the **Edit an existing condition** page. Change the information on this page; then, click **Update Dynamic Condition**.
Note: For more information on completing the fields on this page, see the procedure for adding a condition, which provides a brief description of the purpose of the information in these fields.
 - **view results for an existing dynamic condition?** Click **Run Condition**.
 - **add a new dynamic condition?** Click **New** to open the **Create a new condition** page; then, go to step 4.
 4. Define a name for the new dynamic condition in the **Name of condition** field.
 5. Select **any** or **all** from the **Return items which match [all/any] of the criteria groups specified** pick list.
 6. Define a criteria group in the **Criteria Group** section:
 - 6.1. Select **any** or **all** from the **Return items which match [all/any] of the criteria specified below** pick list.
 - 6.2. Select a criteria type from the **Criteria** pick list; then, click **Add** to display the **Values** field for the criteria type you selected. Complete the **Values** field for the criteria type.

Create a new condition

Name of condition:

Return items which match of the **criteria groups** specified.

Criteria Group

Return items which match of the criteria specified below.

Criteria	Values	
<input type="text" value="Document Type"/>	first select a type of query	<input type="button" value="Add"/>

Figure: Creating a new dynamic condition

6.3. Do you want to add another criteria type?

- **Yes.** Go to step 6.2.
- **No.** Go to step 7.

Create a new condition

Name of condition:

Return items which match of the **criteria groups** specified.

Criteria Group

Return items which match of the criteria specified below.

Criteria	Values	
Document Type	<input type="text" value="Invoice"/>	<input type="button" value="Remove"/>
Title	<input type="text" value="PRM"/>	<input type="button" value="Remove"/>
<input type="text" value="Name"/>	first select a type of query	<input type="button" value="Add"/>


7. Do you want to add another criteria group?

- **Yes.** Click **Add another set of criteria** to display a new set of criteria fields; then, go to step 6.1.
- **No.** Click **Save** to create the dynamic condition.
Note: A system message informs you that the condition has been created. View the list of existing conditions to verify that the new condition has been added.
Note: Having created a new dynamic condition, you need to assign it to a folder. You can also unassign dynamic conditions when they're no longer required for the folder.

8.3.2.3.2 Assigning / Unassigning Dynamic Conditions

Having created a new dynamic condition, you need to assign it to a folder. This procedure assigns and unassigns dynamic conditions to folders.

Perform the following steps:

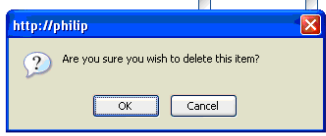
1. Use your administrator login credentials to open **Browse Collections**.
2. Navigate to the folder where you want to assign or unassign dynamic conditions.
3. Click **Permissions** in the **Folder Actions** menu to open the **Folder permissions** page.
4. Click **Edit Permission Assignments** to display the dynamic permissions section on the page.
5. **Do you want to:**
 - **assign a dynamic condition to this folder?** Go to step 6.
 - **unassign a dynamic condition from this folder?** Click  in the **Remove** column for the dynamic condition you want to unassign from this folder.
Note: A system message asks you to confirm the removal of the condition.

Folder permissions

This folder defines its own permissions. [Inherit permissions](#)

Role or Group	Core: Read	Core: Write	Core: Add Folder	Core: Manage security	Core: Delete
Group: A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group: Accounting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group: Anonymous	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group: B	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group: Managers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group: System Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Group: Unit Administrators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Update Permission Assignments Cancel



Dynamic permissions

Remove	Group	Condition	Core: Read	Core: Write	Core: Add Folder	Core: Manage security	Core: Delete
	Managers	Private					

Add a new dynamic permission

Group	Condition	Core: Read	Core: Write	Core: Add Folder	Core: Manage security	Core: Delete
None	None	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add

Figure: Unassigning Dynamic Conditions

6. Select a group from the **Group** pick list, to define the group that will be controlled by this dynamic condition.
7. Select a condition from the **Condition** pick list, to define the dynamic condition that will be assigned.
8. Select the **Permissions** check boxes - one or more - that will be associated with this dynamic condition for the folder.

Folder permissions

This folder defines its own permissions. [Inherit permissions](#)

Role or Group	Core: Read	Core: Write	Core: Add Folder	Core: Manage security	Core: Delete
Group: A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group: Accounting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group: Anonymous	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group: B	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group: Managers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group: System Administrators	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Group: Unit Administrators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Update Permission Assignments Cancel

Dynamic permissions

Add a new dynamic permission

Group	Condition	Core: Read	Core: Write	Core: Add Folder	Core: Manage security	Core: Delete
Managers	Private	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add

Figure: Assigning Dynamic Conditions

9. Click **Add**.

Note: A system message informs you that the dynamic permission has been added, and the new condition displays in the list of existing dynamic conditions on the page.

8.3.3 Document Storage

The Document Storage section of DMS Administration allows you to:

- [force a document check](#) in by overriding its current checked out status
- [restore archived documents](#)
- [restore documents that were previously deleted](#), or permanently expunge (remove) those documents from the repository

8.3.3.1 Forcing a Document Check In

This procedure overrides the currently checked out status of a document and forces the document to be checked back in to the repository.

Forced check ins are used where a checked out document is urgently required back in the repository so that another user can check it out.

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

Perform the following steps:

1. Use your administrator login credentials to open **DMS Administration**.
2. Click **Document Storage** to open the **Document Storage** page.
3. Click **Checked Out Document Control** to open the **Checked Out Documents** page.

Checked Out Documents

It may be necessary to override the **checked-out** status of a document if:

- the local copy of the checked-out document has been lost;
- the user who did the check-out is not currently available to check it back in.

Use the **force checkin** action in the listing below to override the checked-out status.

Document	Checked out by	Location	
Invoice5406	John Doe	Root Folder » Invoice5406	force checkin
Receipt2393	John Doe	Root Folder » Receipt2393	force checkin

Figure 1: Document Check-out Management

4. Click the **force checkin** link for the document you want to check in, to open the **Confirm Forced Check-in** page.

Confirm Forced Check-in

Please confirm that this is the document that you wish to check-in.

Document Details

Document Name

Invoice5406

Location

Root Folder » Invoice5406

Checked out by

John Doe

Force Checkin

Cancel

5. On the **Confirm Forced Check in** page, verify that you're forcing a check in for the correct document; then, click the **Force Check in** button.

Note: The system re-opens the **Checked Out Documents** page, where a system message confirms that the document has been checked in.

8.3.3.2 Restoring Archived Documents

This procedure restores a document that has previously been archived.

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

Perform the following steps:

1. Use your administrator login credentials to open **DMS Administration**.
2. Click **Document Storage** to open the **Document Storage** page.
3. Click **Archived Document Restoration** to open the **Archived Documents** page.
4. Navigate the folder structure to locate the folder that contains the document/s that must be restored; then, click on the folder to display its content.
5. Select the check box for the document you want to restore; then, click **Restore** to open the **Confirm De-archival** page.

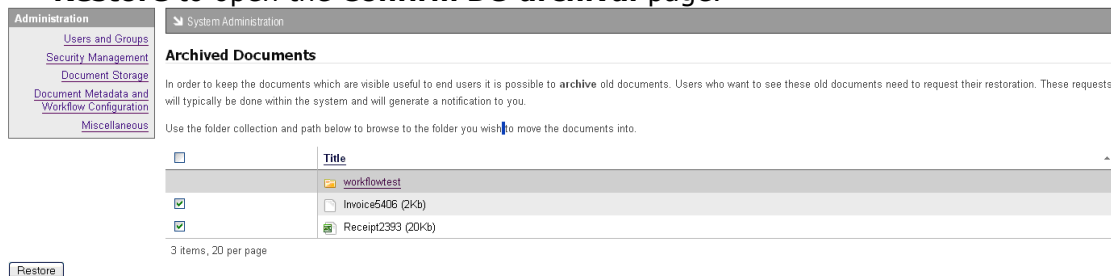


Figure: Restore an archived document

6. Verify that you're restoring the correct document; then, click **Confirm De-archival**.
Note: The system re-opens the **Archived Documents** page and displays a message informing you that the document is active (restored).

8.3.3.3 Restoring / Expunging Deleted Documents

This procedure allows you to restore or expunge documents that have been deleted in the KnowledgeTree™ repository.

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

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

Perform the following steps:

1. Use your administrative login credentials to open **DMS Administration**; then,

click **Document Storage** to open the **Document Storage** page.

2. Click **Restore or Expunge Deleted Documents** to open the **Deleted Documents** page, where you can view a list of documents that have been deleted from the repository, but not yet been expunged.

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

- **restore any of the documents in this list of deleted documents?** Select the check box adjacent to any document in this list that you want to restore to the repository; then, click **Restore** to open the **Confirm Restore** page. Verify that you're restoring the correct document(s); then, click **Confirm Restore** to re-open the **Deleted Documents** page.

Note: A system message informs you that the document has been restored to the KnowledgeTree repository.

- **permanently remove any of the documents in this list of deleted documents?** Select the check box adjacent to any document in this list that you want to permanently remove from the system; then, click **Expunge** to open the **Confirm Expunge** page. Verify that you're removing the correct document(s); then, click **Confirm Expunge**.

Note: A system message informs you that the document has been permanently removed from the KnowledgeTree system.



System Administration

Deleted Documents

Documents which are deleted by users are hidden from view but still available for restoration. Since "soft deletes" consume system resources, it is possible to **expunge** these documents. Alternatively, you can **restore** them as necessary.

<input type="checkbox"/> Document Name	Last Modification
<input type="checkbox"/> Invoice5406	2006-04-03 14:40:26
<input type="checkbox"/> Receipt2393	2006-04-03 14:41:02

Figure 5: Restore or Expunge Deleted Documents

8.3.4 Document Metadata and Workflow Configuration

You use the **Document Metadata and Workflow Configuration** section of **DMS Administration** to access the following system functionality:

- [Document Types](#) - manage the classes of documents that can be added to KnowledgeTree
- [Document Fieldsets](#) - manage the types of information that can be associated with classes of documents
- [Link Type Management](#) - manage the different ways in which documents can be associated with one another
- [Workflows](#) - configure document workflows

- [Automatic Workflow Assignments](#) - configure the allocation of documents to workflows

System Administration

Document Metadata and Workflow Configuration

Document Types

Manage the different classes of document which can be added to the system.

Document Fieldsets

Manage the different types of information that can be associated with classes of documents.

Link Type Management

Manage the different ways documents can be associated with one another.

Workflows

Configure the process documents go through.

Automatic Workflow Assignments

Configure how documents are allocated to workflows.

Figure: Content page for Document Metadata and Workflow Configuration

8.3.4.1 Document Types

Document Types are used to group together documents that have a similar function. They also allow you to associate custom fieldsets for specific information that must be included with a particular document type.

Let's say you create a **document type** called '**Invoice**', and you want to ensure that all documents of the type '**Invoice**' contain the following fields: **invoice number**, **customer name**, **delivery address**. You can group these fields in a fieldset called **Invoice Details**, for example. And then you may want to create another fieldset for the monetary values in the invoice, which you could call '**Amount**'. The fieldset **Amount** may include the following fields: **Nett Item Value**, **Tax**, **Discount**, and **Total Due**.

There are two ways you can configure the document type - **Invoice** - and the fieldsets you want to associate with this document type.

1. You can first create the document type in the **Document Types** section, and then create one or more custom fieldsets in the **Document Fieldsets** section. The collection of fieldsets you define are automatically listed in the **Document Type editing** page. Having created the fieldset(s), you need to edit the document type you created in order to add (associate) the fieldset(s) you want to use in this document type.
2. Alternatively, you can first create a set of custom fieldsets in the **Document Fieldsets** section, and then create the document type. Having added the document type, KnowledgeTree automatically opens the **Document Type editing** page, where you can select the fieldsets out of the collection of fieldsets you have pre-defined in

Document Fieldsets, and which now display on the **Document Type editing** page.

Note: Document types cannot be deleted in KnowledgeTree; they can only be disabled. Since a document type may be associated with a large amount of documents, deleting a document type may cause the loss of required metadata.

8.3.4.1.1 Adding a New Document Type

This procedure creates a new document type.

Note: When adding or editing a document type, KnowledgeTree allows you to associate one or more pre-defined, custom fieldsets, that define the information - i.e. name, invoice number, amount, address, publish date etc - that should be included in any document that is of a specific document type. See the [introduction to Document Types](#) for more information about the relationship between document types and custom fieldsets.

When adding a new New Document Type you need to complete the following tasks before using the document type:

- defining new custom fieldsets for the new document type, and then associating the new custom fieldsets with the new document type; or, associating existing custom fieldsets with the new document type
- enabling the new document type to make it available when you add new documents to the KnowledgeTree Document Management System

Perform the following steps:

1. Use your administrator login credentials to open **DMS Administration**; then, click **Document Metadata and Workflow Configuration** to open the **Document Metadata and Workflow Configuration** page.
2. Click **Document Types** to open the **Document Types** page.
3. Define a name for the new document type in the **Name** field; then, click **Create** to open the **Document Types** editing page.

on » [document metadata and workflow configuration](#) » [document type management](#) (view types)

System Administration

Document Types

Create a new document type

To start the process of creating a new document type, please enter a name for the type below.

Name ▪
 A short, human-readable name for the document type.

Existing document types

Select a document type from the list below to change its details, or click on the delete button to remove it from the system.

Document Type		
Default	Edit	Disable
Project Plan	Edit	Disable
Manual	Edit	Disable

Figure: Click Create to add the new document type

Note: A system message on the **Document Type editing** page informs you that the new document type has been created.

4. Have you already created custom fieldsets for your organization?

- **Yes.** In this case, your collection of predefined custom fieldsets are listed on the **Document Types** editing page, where you can associate one or more fieldsets with the document type you created.

↩ System Administration

❗ Document type created

Document Type: Invoice

Type-specific field sets

❗ No fieldsets are currently associated with this type.

Associate Fieldsets

Available Fieldsets ▾

Select the fieldsets which you wish to associate with this document type

Invoice information

Receipt information

Figure: Document Types editing page displays available custom fieldsets

- **No.** In this case, the **Document Type editing** page displays a message that there are no fieldsets available to associate with the document type you created. Go to [Creating Document Fieldsets](#) to find out more about creating custom fieldsets for your organization.
Note: Customized document fieldsets that you create are added your collection of fieldsets on the **Document Type editing** page, where you can associate these fieldsets with document types when adding new document types, or when editing existing document types.

System Administration

Document type created

Document Type: Invoice

Invoice

Type-specific field sets

No fieldsets are currently associated with this type.

No fieldsets are available to be added. To add a fieldset, please go to DMS Administration » Document Metadata and Workflow Configuration » Document Field Management

Figure: Add new document type - no fieldsets available

8.3.4.1.2 Editing a Document Type

This procedure edits an existing document type.

Editing a Document Type involves:

- changing the name of the document type
- associating custom fieldsets
- disassociating custom fieldsets

Note: You need to have created custom fieldsets in the **Document Fieldsets** section of **DMS Administration** in order to make a list of custom fieldsets available on the **Document Types** editing page, where you associate or disassociate fieldsets with document types.

Perform the following steps:

1. Use your administrator login credentials to open **DMS Administration**; then, click **Document Metadata and Workflow Configuration** to open the **Document Metadata and Workflow Configuration** page.
2. Click **Document Types** to open the **Document Types** page.
4. Scroll down the page to view the list of existing document types in the **Existing document types** section.

Document Types

Create a new document type

To start the process of creating a new document type, please enter a name for the type below.

Name ▪

A short, human-readable name for the document type.

Create

Existing document types

Select a document type from the list below to change its details, or click on the delete button to remove it from the system.

Document Type

Default [Edit](#) [Disable](#)

Project Plan [Edit](#) [Disable](#)

Manual [Edit](#) [Disable](#)

Figure: Document Types page listing existing document types

5. Click the **Edit** link for the document type you want to modify, to open the **Document Type editing** page.

Document Type: Invoice

Invoice

Type-specific field sets

Linked Fieldsets

Fieldset

Invoice information

Associate Fieldsets

Available Fieldsets ▾

Select the fieldsets which you wish to associate with this document type

Receipt information

Figure: Document Types editing page displaying Type-specific fieldsets (custom fieldsets that have already been associated with this document type), and displaying custom field sets that are available for associating with this document type.

6. Do you want to...

- **change the name of the document type?** Define a new name for this document type in the field adjacent to the **Change** button; then, click **Change** to rename the document type.
Note: A system message informs you that the name of this document type has been changed.
- **associate a custom fieldset with this document type?** Go to [Associating / Disassociating Custom Fieldsets with Document Types](#).
- **disassociate a custom field set that you previously associated with this document type?** Go to [Associating / Disassociating Custom Fieldsets with Document Types](#).

This procedure associates available custom document fieldsets with a new or existing document type. It also allows you to disassociate a custom fieldset that was previously associated with an existing document type.

Note: You need to have created custom fieldsets before they will display in the Document Types editing page, where you can associate them with one or more document types. Associating fieldsets with document types associates the metadata you added for the fieldset with the document type.

Note: See [Creating Custom Document Fieldsets](#) for more information.

Perform the following steps:

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

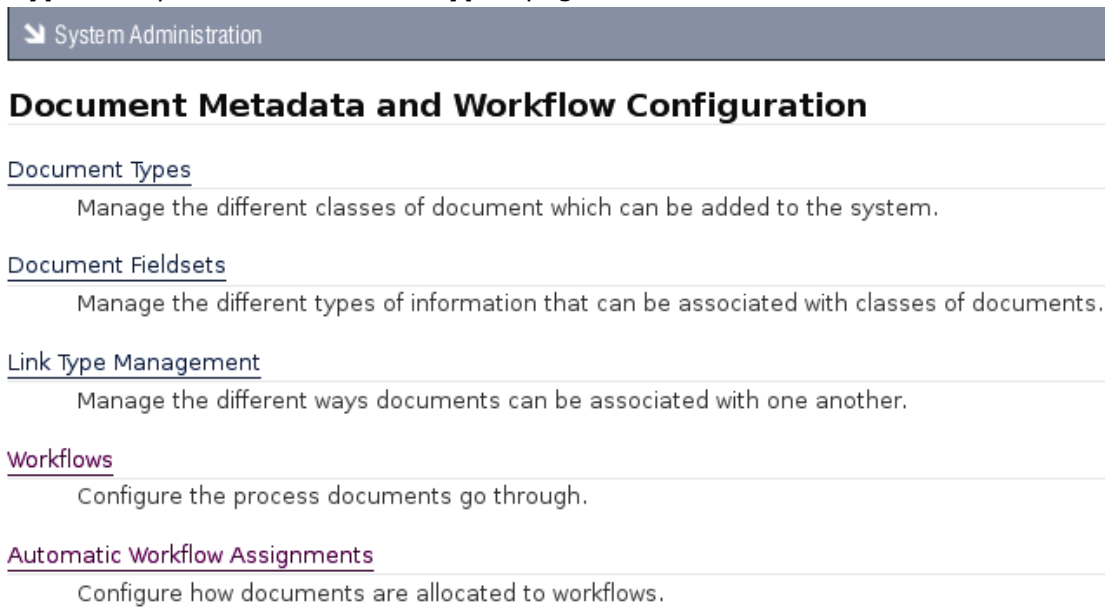


Figure: The Document Metadata and Workflow Configuration section of DMS Administration

2. Scroll down the page to the list of document types that exist for your organization in the **Existing document types** section.

Note: You need to have created the document type before you can associate fieldsets with that document type. For more information about creating new document types, go to [Adding a New Document Type](#).
3. Click the **Edit** link for the document type where you want to associate / disassociate fieldsets, to open the **Document Type** editing page.

Note: If this document type already has field sets associated with it, these will be displayed in the **Type-specific field sets** section on this page.
4. **Do you want to...**

- **disassociate one of the type-specific custom fieldsets with this document type?** Select the check box adjacent to the fieldset that you want to disassociate from this document type, in the **Type-specific field sets** section; then, click **Disassociate Fieldsets**.

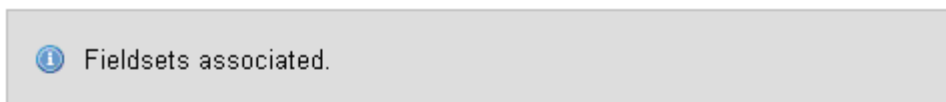
Note: Type-specific custom fieldsets are custom fieldsets that are currently associated with the document type you're editing.

Note: A system message informs you that the fieldsets you selected are no longer associated with this document type.

- **associate one of the available custom fieldsets with this document type?** Select one or more fieldsets in the **Available Fieldsets** scrollable menu; then, click **Associate Fieldsets**.

Note: Hold down your keyboard **Ctrl** key while selecting menu options to multi-select from this menu.

Note: A system message informs you that the fieldset has been associated with this document type.



Document Type: Invoice

Invoice

Type-specific field sets

Linked Fieldsets

Fieldset

Invoice information

Associate Fieldsets

Available Fieldsets ▀

Select the fieldsets which you wish to associate with this document type

Receipt information

Figure: Associating and Disassociating Fieldsets

8.3.4.1.4 Viewing / Enabling / Disabling Document Types

This procedure displays a list of the document types that exist for your organization. It also allows you to disable document types that you no longer want to use, or to enable document types that are currently disabled.

Note: KnowledgeTree does not allow you to delete document types because you risk losing required metadata. You need to disable a document type to make it unavailable to users.

Perform the following steps:

1. Use your administrator login credentials to open **DMS Administration**; then, click **Document Metadata and Workflow Configuration** in the **Administration** menu to open the **Document Metadata and Workflow Configuration** section.
2. Click **Document Types** to open the **Document Types** page.
3. **Do you want to...**
 - **view the document types that have been created for your organization?** Scroll down the page to view a list off all document types - whether enabled or disabled - in the **Existing document types** section of this page.

System Administration

Document Types

Create a new document type

To start the process of creating a new document type, please enter a name for the type below.

Name *
A short, human-readable name for the document type.

Existing document types

Select a document type from the list below to change its details, or click on the delete button to remove it from the system.

Document Type		
Default	Edit	Disable
Project Plan	Edit	Disable
Manual	Edit	Disable

Figure: View existing document types

- **enable a document type in this list?** Click the **Enable** link for the document type you want to enable.
Note: The link changes to **Enable**.

- **disable a document type in this list?** Click the **Disable** link for the document type you want to disable.
Note: The link changes to **Disable**. Disabling a document type removes it from view for users.

8.3.4.2 Document Fieldsets

Document Fieldsets allow you to associate custom metadata with documents in the repository.

There are two types of document fieldsets:

- **Normal** - users are allowed to edit normal fieldsets only if they have been associated with the document type that is being edited.
- **Generic** - users may add and edit generic fieldsets to any document type in KnowledgeTree.

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

8.3.4.2.1 Add New / Edit Existing / Deleting Custom Document Fieldsets

This procedure creates a new custom document fieldset, and it allows you to edit or delete existing custom document fieldsets.

Note: A document fieldset may be defined as a collection of fields that represent a set of related information, which can be associated with a document to comprise part of that document's metadata. Custom fieldsets are defined by the KnowledgeTree administrator, and are associated document types.

Perform the following steps:

1. Use your administrator login credentials to open **DMS Administration**; then, click **Document Metadata and Workflow Configuration** to open the **Metadata and Workflow Configuration** page.
2. Click **Document Fieldsets** to open the **Document Fieldset** management page.
3. View the list of document fieldsets that have been defined for your organization, in the **Existing document fieldsets** section on this page.

Document Fieldsets

Collections of fields are associated into fieldsets. These represent a set of related information

Existing document fieldsets

Name	Is Generic	Is System	Fields	Edit	Delete
Invoice information			Invoice Number, Source		
Receipt information			Receipt Number, Source		
Category			—		

Figure: Viewing existing document fieldsets

4. Do you want to...

- **remove an existing document fieldset?** Click in the **Delete** column for the document fieldset. Click **OK** on the system message that asks you to confirm the deletion.
- **edit an existing document fieldset?** Click in the **Edit** column for the document type, to open the **Fieldset** editing page. You can change this fieldset's name, its namespace, and/or its description. When you're done, click **Change**.

Fieldset: newfield

Fieldset properties

Please complete the following fields to edit the fieldset's properties and then click **Change**. Required fields are with a red square.

Name ■

A human-readable name, used in add and edit forms.

Namespace ■

Every fieldset needs to have a system name (used internally by the document management system). For fieldsets which you create, this is automatically created by the system, but for fieldsets created by plugins, this controls the fieldset works.

Description ■

A brief description of the information stored in this fieldset.

Figure: Editing Document Fieldsets

- **add a new document fieldset?** Go to step 5.
5. Define a name for the document fieldset in the **Name** field; then, provide a brief description for the information that will be stored in this fieldset, in the **Description** field.
6. **Is this a generic fieldset?**
- **Yes.** Select the **Generic** check box.
 - **No.** Go to step 7.
7. Click **Create**.

– Create a new document fieldset _____

Name ▪
A human-readable name, used in add and edit forms.

Description ▪
A brief description of the information stored in this fieldset.

Generic
A generic fieldset is one that is available for every document by default. These fieldsets will be available for users to edit and

System
A system fieldset is one that is never displayed to a user, and is used only by the document management system.

Figure: Create new document fieldset

8.3.4.2.2 Fields

KnowledgeTree™ uses **fields** to group sets of related information into predefined **fieldset**s. The custom fieldsets are then associated with specific **document types**, to define the information (metadata) that should be included on documents of that type.

There are three classes of custom fields in KnowledgeTree:


- Normal - stores text metadata, such as invoice code
- Lookup - used to allow users to select from a predefined set of options

-
- Tree - used to allow users to select a metadata value by browsing a tree structure

8.3.4.2.2.1 Add New / View Existing Fields

This procedure creates fields in a custom fieldset.

Perform the following steps:

1. Use your administrator login credentials to open the **Document Metadata and Workflow Configuration** page in **DMS Administration**; then, click **Document Fieldsets** to open the **Document Fieldsets** management page.
2. Click  in the **Edit** column for the fieldset where you want to create fields, to open the **Fieldset** editing page.
3. View the fieldset members that already exist for this fieldset, in the **Fieldset members** section.
4. Scroll down to the **Fieldset members** section on this page; then, define a name for the field in the **Name** field.
5. Enter a description for information that will be stored in this field in the **Description** field.
6. **Is this a...**
 - **normal field?** Select **Normal** from the **Type** pick list.
 - **lookup field?** Select **Lookup** from the **Type** pick list.
 - **tree field?** Select **Tree** from the **Type** pick list.
6. Click **Add Field** to open the **Edit Field** page for the new field, where you can change any of the detail you defined when creating the field.

8.3.4.2.2.2 Viewing / Removing Existing Fields

This procedure displays fields that are currently members of a specified fieldset, and it allows you to remove any of these fieldset members.

Perform the following steps:

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

2. Click  in the **Edit** column for the fieldset, to open the **Fieldset** editing page.

3. Do you want to...

- **view fields that have been defined for this fieldset?** Scroll down to the **Fieldset members** section on this page to view a list of fields that are currently members of this fieldset.
- **remove a field as a member of this fieldset?** Select the check box adjacent to the field(s) you want to remove; then, click **Remove fields**.
- **edit an existing field?** Click the **(edit)** link adjacent to the field name, to open the **Edit Field** page.

8.3.4.2.2.3 Managing Tree Fields

Trees can have multiple sub-categories and levels. You need to add sub-categories at each level in order to organize the options into a 'tree'.

The top level of the tree is called the **root**. The root, which holds all the top level items, is not shown to the user, but it provides a single 'parent' to the top level items.

For example, let's say you create a tree of the countries in the world. In this case, the actual countries would be keywords - e.g. South Africa, England, Singapore, etc. And the highest group of categories (the top level or 'root') would be continents - e.g. Africa, Europe, Asia etc. The sub-categories, which fall below the top level 'continents' could be 'regions' - e.g. Sub-Saharan Africa, Western Europe, South East Asia.

KnowledgeTree allows you to create more sophisticated tree fields on the **Edit Lookup Tree** page.

Edit Lookup Tree: Invoice Source

Many "lookup" fields make sense in a hierarchy: countries are part of continents and sub-continents, school classes are part of grades, and so on. This page will allow you to arrange the lookups in the field in a hierarchy. All changes are immediately stored, so you can see the results as you make them.

Add New Subcategory to **Root**

In order to organise the options into a "tree", you need to add subcategories at each level. The "top" level is called the root, and a user, but provides a single "parent" to the toplevel items.

As an example, if you are creating a tree of the countries in the world, the actual countries would be **keywords** (e.g. South Africa, Germany, France) — followed by subcategories that contain actual countries — e.g. Africa, Europe, Asia, The Americas — followed by subcategories that contain actual countries — e.g. Vietnam, India, China, etc.

Preview

Use the +/- arrows to open or close the tree. Bold items are metadata keywords. To edit a category (including adding or removing subcategories), click the [edit](#) link.

[-] [Root](#) ([edit](#))

- [-] [Africa](#) ([attach keywords](#) | [delete](#))
 - South Africa** ([unlink](#))
- [-] [Europe](#) ([attach keywords](#) | [delete](#))
 - France** ([unlink](#))
 - Germany** ([unlink](#))
- [-] [North America](#) ([attach keywords](#) | [delete](#))
 - United States** ([unlink](#))
 - Canada** ([unlink](#))

Figure: The Edit Lookup Tree page

8.3.4.3 Link Type Management

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

When creating a document link, you should specify the type of relationship that the link implies between the linked documents – i.e. 'associated with', or 'duplicated by'.

8.3.4.3.1 Creating Document Link Types

Perform the following steps:

1. Use your administrator login credentials to open DMS Administration; then, click **Document Metadata and Workflow Configuration**.
2. Click **Link Type Management**.
3. Define a name for the link type in the **Name** field.

4. Briefly describe the link in the **Description** field.

5. Click **Add Link Type**.

System Administration

Link Type created.

Document Link Type Management

Within KnowledgeTree it is possible for users to create links between related documents. Link types may include criteria required by your organisation below.

Add a link type

Specify the details for a new link type below.

Name ▪
A short, human-readable name for the link type.

Description ▪
A short brief description of the relationship implied by this link type.

Manage Existing Link Types

From this panel you can edit or delete existing link types.

Note: deleting a link type will delete **all** links of that type within the system.

Name	Description	Edit	Delete
duplicated by	Document is a duplicate		

Figure: Creating a Document Link Type

8.3.4.3.2 Deleting a Document Link Type

Perform the following steps:

1. Use your administrator login credentials to open **DMS Administration**; then, click **Document Metadata and Workflow Configuration**.
2. Click **Link Type Management**.
3. Click in the **Delete** column for the link you're removing.
4. Click **OK**.

Document Link Type Management

Within KnowledgeTree it is possible for users to create links between related documents. Link types may include constructs such as "associated" required by your organisation below.

Add a link type

Specify the details for a new link type below.





Name ▀
A short, human-readable name for the link type.

Description ▀
A short brief description of the relationship implied by this link type.

Manage Existing Link Types

From this panel you can edit or delete existing link types.

Note: deleting a link type will delete **all** links of that type within the system.

Name	Description	Edit	Delete
duplicated by	Document is a duplicate		
associated with	This document is associated		

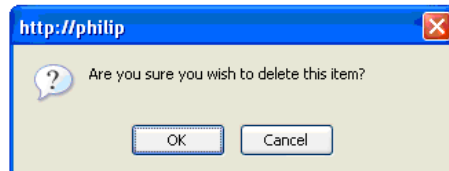



Figure: Removing a Document Link Type

8.3.4.3.3 Editing Fields

This procedure edits fields that are members of a specified fieldset.

Perform the following steps:

1. Use your administrator login credentials to open the **Document Metadata and Workflow Configuration** page in **DMS Administration**; then, click **Document Fieldsets** to open the **Document Fieldsets** management page.
2. Click  in the **Edit** column for the fieldset, to open the **Fieldset** editing page.
3. **Do you want to...**
 - **view or remove fields that have been defined for this fieldset?** Go to Viewing / Removing Existing Fields.
 - **edit an existing field?** click the **(edit)** link adjacent to the field name, to open

the **Edit Field** page.

4. Is this a...

- **normal field?** You can change any of the field properties - **Name**, or **Description**. When you're done, click **Change**.
- **lookup field?** You can change any of the field properties - **Name**, or **Description**. When you're done, click **Change**. Enter a lookup value in the **Add new values** field; then, click **Add**. Repeat this procedure for each lookup value you want to add for this field.

Edit Field: Invoice Source

Lookup fields may have be composed of an arbitrary numbe an external datasource, toggling the **Sticky** attribute of a va

Field properties

Name

Description

Type Lookup

Lookup Values

Add new values

Existing values

- Partner

Figure: Editing a Lookup Field

Note: If the lookup values are being generated by, or synchronized to, an external datasource, toggling the **Sticky** attribute (use the **Toggle stickiness** button) of a value ensures that it won't be modified by changes in the external datasource list. You can also remove or disable these lookup values.

- **tree field?** You can change any of the field properties - **Name**, or **Description**. When you're done, click **Change**. Enter a lookup value in the **Add new values**

field; then, click **Add**. Repeat this procedure for each lookup value you want to add for this field.

Edit Field: Invoice Source

Lookup fields may have be composed of an arbitrary n an external datasource, toggling the **Sticky** attribute o

The screenshot shows a 'Field properties' dialog box. It has three main sections: 'Name', 'Description', and 'Type'. The 'Name' field contains 'Invoice Source'. The 'Description' field contains 'Where is the invoice from?'. The 'Type' field is set to 'Tree'. At the bottom of the dialog is a 'Change' button.

Lookup Values

The screenshot shows a 'Lookup Values' dialog box. It has two main sections: 'Add new values' and 'Existing values'. In the 'Add new values' section, there is a text input field containing 'External' and an 'Add' button. Below this is a link labeled 'Manage lookup tree'. In the 'Existing values' section, there is a list item 'Internal' with an unchecked checkbox. At the bottom of the dialog are three buttons: 'Disable', 'Toggle stickiness', and 'Remove'.

Figure: Editing a Tree Field

Note: If the lookup values are being generated by, or synchronized to, an external datasource, toggling the Sticky attribute (use the **Toggle stickiness** button) of a value ensures that it won't be modified by changes in the external datasource list. You can also remove or disable these lookup values.

Note: You use the **Manage lookup tree** link shown in the image above to create more sophisticated tree fields. Go to [Managing Tree Fields](#) for more information.

8.3.4.4 Workflows

A workflow is a pre-defined set of tasks that must be performed on a document during the document life cycle. For example, an invoice is created, distributed, then paid; a report may be created, reviewed, edited, and distributed.

Some documents, such as tenders, may have complex workflows, requiring input from several people within and outside of your organization before the work is complete.

Workflows in KnowledgeTree involve three key areas:

- [Assigning workflows](#)
- [States and Transitions](#)
- [Workflow effects \(Actions\)](#)

8.3.4.4.1 Assigning Workflows

A document in the repository can have only one workflow attached to it at any given time.

By default, workflows are not automatically attached to new documents when they're added to the repository. However, the administrator may configure the system to assign workflows when new documents are created, or to assign workflows only to specific documents.

Users are also allowed to select and assign workflows to the documents they are working with, provided they have the permissions to do so. To enable a workflow, a start state must be assigned.

8.3.4.4.2 States and Transitions

Workflows consist of **states** and **transitions**. A state may be defined as a stage in a document's lifecycle, such as 'billed' or 'draft'. Each workflow has a starting state, which is the initial state for any document in a workflow.

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

8.3.4.4.3 Workflow Effects (Actions)

Workflows are more than just **states** and **transitions**. They may be used to restrict, deny or grant access to documents in the repository, based on the document's position in the workflow.

A workflow state can restrict both the actions and permissions on a specific document. For example on certain documents the check in action can be disallowed.

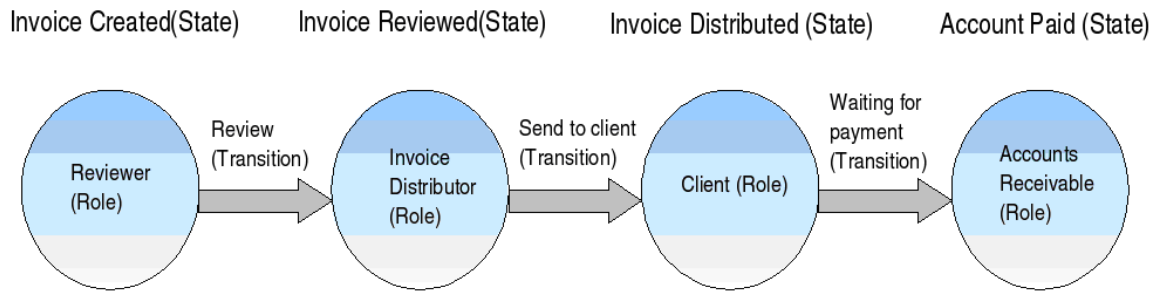



Figure: A typical document workflow

8.3.4.4.4 Enabling a Document Workflow

By default, newly created workflows are **disabled**. You need to set an initial **workflow state to enable** the workflow. This is the state the workflow starts with when it is assigned to a document.

Perform the following steps:

1. Use your administrator login credentials to open the **Document Metadata and Workflow Configuration** section in **DMS Administration**.
2. Click **Workflows**.
3. Click  in the **Edit** column for the workflow.
4. Select a **Starting State**; then, click **Update Workflow Properties**.
5. Click **Workflows**.

System Administration

This workflow is currently disabled. To enable it, please assign a starting state in the "Edit workflow properties" box.

Workflow Overview: Invoice

Edit workflow properties

Name ▪
A human-readable name for the workflow.

Starting State
When a document has this workflow applied to it, to which state should it initially be set. **Note that workflows without a starting state cannot be applied to documents.**

This page allows you to get a quick overview of the workflow. To modify items, either select them from the overview below, or use the "Workflow" menu on the left to create new ones.

State: [Invoice Created](#) | ⊖ [Delete](#)

Notified groups & roles: No users to be notified.
Controlled Actions available: Display Details, Download, Checkout, Cancel Checkout, Checkin, Version History, Discussion, Email, Links
Permissions overridden: No permissions are changed in this state.
Transitions available: **No transitions available**
Transitions to this state: **This state is unreachable.**

State: [Document Reviewed](#) | ⊖ [Delete](#)

Notified groups & roles: No users to be notified.
Controlled Actions available: No actions available.
Permissions overridden: No permissions are changed in this state.
Transitions available: **No transitions available**
Transitions to this state: **This state is unreachable.**

Figure: Enabling Document Workflows

8.3.4.4.4.1 Creating a Document Workflow

Perform the following steps:

1. Use your administrator login credentials to open the **Document Metadata and Workflow Configuration** section in **DMS Administration**.
2. Click **Workflows**.
3. Define a name for the workflow in the **Name** field.
4. Click **Create**.
5. Click **Workflows**.

Workflows

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

Create a new workflow

Name ▪
A human-readable name for the workflow.

Create

Existing workflows

Select a workflow to modify. To enable a disabled workflow, edit it and set a proper starting state.




Name	Status	Edit
Project Plan	Enabled	 Disable
Receipt	Disabled	

Figure: Creating a document workflow

8.3.4.4.5 Creating a Workflow State

Perform the following steps:

1. Use your administrator login credentials to open the **Document Metadata and Workflow Configuration** section in **DMS Administration**.
2. Click **Workflows**.
3. Click  in the **Edit** column for the workflow.
4. Click **States**; then, click **Create a new state**.
5. Define a name in the **Name** field; then, click **Create State**.
6. **Do you want to inform users once when this state is reached?**
 - **Yes.** Select the roles and groups to inform by clicking on the corresponding check boxes; then, click **Update Users to Inform**.
 - **No.** Go to step 7.

Note: Before you can set which user groups and roles to inform you first need to create the groups and roles.

7. Do you want to change the core permissions associated with this state?

- **Yes.** Select the permissions you want to control with this state; then, click **set controlled permissions**. You will then be able to allocate the document permissions assigned to all groups when the document is in this particular state.
- **No.** Exit this procedure.

New State

As documents move through their lifecycle, they are placed in certain **states**. For example, an invoice w performed by a user.

Create a new state

Please note that additional configuration is possible on states beyond what is specified here (e.g. wh other properties).

Name

A human-readable name for the state.

Actions Allowed


Workflows can control which actions (edit metadata, download, etc.) are available on a given docume document is in this state.

- Display Details**
- Download**
- Checkout**
- Cancel Checkout**
- Checkin**
- Edit metadata**
- Delete**
- Move**
- Copy**
- Rename**
- Transaction History**
- Version History**
- Archive**
- Workflow**
- Permissions**
- Discussion**
- Email**
- Links**

Figure: Create Workflow State

8.3.4.4.6 Deleting a Workflow State

Perform the following steps:

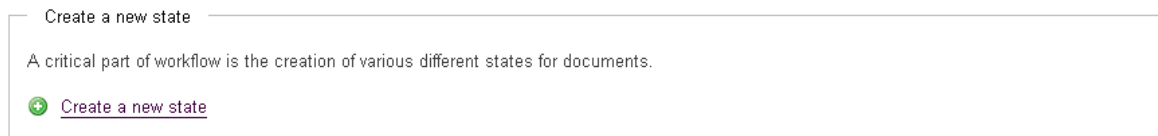
1. Use your administrator login credentials to open the **Document Metadata and Workflow Configuration** section in **DMS Administration**.
2. Click **Workflows**.
3. Click  in the **Edit** column for the workflow.
4. Click **States**.
5. Click **Delete**.



Manage States

As documents move through their lifecycle, they are placed in certain **states**. For example, an invoice which has been mailed might be in the "Pending" state.

Please Note: you can only delete states or transitions while the workflow has no documents or document-versions assigned to the workflow.



State: [Invoice Created](#) |  [Delete](#)

Notified groups & roles: No users to be notified.
 Controlled Actions available: Display Details, Download, Checkout, Cancel Checkout, Checkin, Version History, Discussion, Email, Links
 Permissions overridden: No permissions are changed in this state.
 Transitions available: **No transitions available**
 Transitions to this state: **This state is unreachable.**

Figure: Removing Workflow State

8.3.4.4.7 Creating Workflow Transitions


You need to set several options when creating Workflow Transitions.

- **Destination state** - the Transition sets the workflow to Destination state when the workflow is complete.
- **Guard Permission** - this is the lowest permission a user requires to perform a particular transition.
- **Guard Group** - the group a user must be in to run the transition.

-
- **Guard Role** - the role a user must be assigned to in order to run the transition.

The **source state** defines the states from which a user may perform a transition. A single transition can be performed from many different states.

Perform the following steps:

1. Use your administrator login credentials to open the **Document Metadata and Workflow Configuration** section in **DMS Administration**.
2. Click **Workflows**.
3. Click  in the **Edit** column for the workflow.
4. Click **Transitions**; then, click **Create a new Transition**.
5. Define a name in the **Name** field; then, select a **Destination State**.
6. Select a **Guard Permission**.
7. **Do you want to assign a Guard Group?**
 - **Yes.** Select a **Guard Group**.
 - **No.** Leave the lookup value to **none**.
8. **Do you want to assign a Guard Role?**
 - **Yes.** Select a **Guard Group**.
 - **No.** Leave the lookup value to **none**.
9. Click **Create Transition**.

Manage Transitions

Transitions are what drive the workflow of documents. Each step that needs to be followed in the document's lifecycle could map to a transition, permissions and groups.

Use the form below to create a new Transition, and assign or edit existing transitions using the table below.

Create a new transition

Name ▪
A human-readable name for the transition.

Destination State ▪
Once this transition is complete, which state should the document be in?

Guard Permission. ▪
Which permission must the user have in order to follow this transition?

Guard Group.
Which group must the user belong to in order to follow this transition?

Guard Role.
Which role must the user have in order to follow this transition?


Source States
Please select which states this transition should be available from. **Note** that transitions are never available from their target state, even if you

Invoice Created
 Invoice Reviewed

Figure: Create WorkFlow Transitions

8.3.4.4.8 Deleting Workflow Transitions

Perform the following steps:

1. Use your administrator login credentials to open the **Document Metadata and Workflow Configuration** section in **DMS Administration**.
2. Click **Workflows**.
3. Click  in the **Edit** column for the workflow.
4. Click **Transitions**.
5. Click **Delete**.

Transition Availability updated.

Manage Transitions

Transitions are what drive the workflow of documents. Each step that needs to be followed in the document's lifecycle could map to a transition, and can be controlled by permissions and groups.

Please Note: you can only delete states or transitions while the workflow has no documents or document-versions assigned to the workflow.

Create a new transition

[Create a new transition](#)

Transition Availability

Click on any transition below to edit it directly, or use the checkboxes to assign which states the transition is available from.

	Invoice Created	Invoice Reviewed	Invoice Distributed
Review Delete	<input checked="" type="checkbox"/>	—	<input type="checkbox"/>
Send to client Delete	<input type="checkbox"/>	—	<input type="checkbox"/>

[Assign Transition Availability](#)

Figure: Remove WorkFlow Transitions

8.3.4.4.9 Selecting Workflow Actions

Assigning Workflow actions allows you to define the document actions users are allowed to perform in particular workflow states.

For example, you may want to disable all document actions, except check in and check out, on a document that is in its Review state.

Perform the following steps:

1. Use your administrator login credentials to open the **Document Metadata and Workflow Configuration** section; then, click **Workflows**.
2. Click **Edit**.
3. Click **Actions**.
4. Select Actions - one or more - from the **Assign Actions to States** section; then, click **Update Action Availability**.
5. Select the document actions users should be able to perform when a document is in the workflow.
6. Click **Update Action Availability**.

Manage Actions

An important part of workflow is controlling which actions are available to users at various stages. For example, it may be necessary to prevent the "Edit Metadata" action from document is "published". Doing this is a two step process: first, you need to specify that "Edit Metadata" is an action you wish to control within this workflow, second, you n action is **not** to be made available when documents are in the "published" state.

Specify Controlled Actions

Select the actions you want this workflow to control from the list below. Actions you do not specify will be available no matter what the state of the document.

- Display Details
- Download
- Checkout
- Cancel Checkout
- Checkin
- Edit metadata
- Delete
- Move
- Copy
- Rename
- Transaction History
- Version History
- Archive
- Workflow
- Permissions
- Discussion
- Email
- Links

Assign Actions to States

The table below lists the actions you have specified as controlled by this workflow, and all the states within the workflow. From here you can assign those actions to the vari Checked items are available to users whose permissions would normally allow them when the document is in that state. Unchecked items are not available to any users.

	Email	Discussion	Workflow	Version History	Transaction History	Copy	Edit metadata	Checkin	Download	Display Details
Invoice Created	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Invoice Reviewed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Figure: Selecting Workflow actions

8.3.4.5 Automatic Workflow Assignments

Automatic workflows allow you to define the conditions for automatically assigning a specific workflow to a document.

Workflow assignment may occur on a per folder basis or on a per document type basis. Only one mode may be selected for a particular system.

8.3.4.5.1 Setting Workflow Allocation by Document Type

Perform the following steps:

1. Use your administrator login credentials to open **Document Metadata and Workflow Configuration**.

2. Click **Automatic Workflow Assignments** to open the Automatic Workflow Selection page.
3. Select a **Workflow Plug-in**.
4. Click **Update**.

System Administration

Automatic Workflow Selection

Workflow Allocation Plugins

Documents may be associated on creation or modification with a workflow. Workflow assignment may occur on a per **Folder** or per **Document** the system. In order to automatically associate documents with a workflow, please select the appropriate plugin from the list below.

Workflow Plugins ▀
Plugins providing workflow allocators.

DocumentTypeWorkflowAssociator ▼

Update

Figure: Selecting Workflow Allocation

8.3.5 Miscellaneous

You use the **Miscellaneous** section of **DMS Administration** to perform the following administrative functions:

- [edit KnowledgeTree's onscreen help](#)
- [manage saved searches](#)
- [manage plug-ins](#)
- [view support and system information](#)

System Administration

Miscellaneous

Edit Help files
Change the help files that are displayed to users.

Saved searches
Manage saved searches - searches available by default to all users.


Manage plugins
Register new plugins, disable plugins, and so forth

Support and System information
Information about this system and how to get support.

Figure: Miscellaneous Section of DMS Administration

8.3.5.1 Edit Help Files

The KnowledgeTree™ Document Management System contains several built in system help files.

You can open a help file anywhere in the system by clicking this help page icon: 

The help file that displays is relevant to the location of the icon. For example, in the image below, you click the help page icon on the right of the page to view help for Browse Documents.

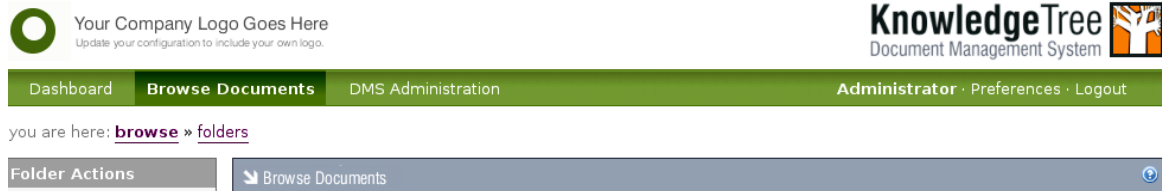


Figure: Click the help page icon to view help for Browse Documents

Customizing KnowledgeTree Help

KnowledgeTree allows you to customize the help for your organization.

Once you have changed an onscreen help file, the file is listed on the **Current help assignments** page in the **Edit Help Files** section of **Miscellaneous** in **DMS Administration**.



Current help assignments

To customise a help file, please visit that file via the help system and click on **customise this help file**.

Existing customised help pages

Name	Actions
/kthelp/ktcore/EN/browse.html	Delete
/kthelp/ktcore/EN/dashboard.html	Delete

Figure: Current help assignments page lists the files you customized for your organization

8.3.5.1.1 Viewing Help Files

This procedure displays KnowledgeTree's customizable, onscreen help.


Note: Although non-administrative KnowledgeTree users have view only access to the onscreen help files in Browse Collections, this procedure requires that you login as the administrator in order to view the customizable version of the help files in DMS Administration

and in Browse Collections.

Perform the following steps:

1. Use your administrator user name and password to login to KnowledgeTree.

2. Do you want to view...

- **one specific help file?** Navigate to the page where you want to view help information; then, click  to display the file. Go to step 3.

Note: Since you're logged in as the administrator, the help file provides an **Edit this help page** button. See [Editing / Deleting Help Files](#) for more information about customizing help files.

- **your collection of customized help files?** Navigate to the **Miscellaneous** section of **DMS Administration**; then, click **Edit Help Files** to open the **Current help assignments** page. View the list of files in the **Existing customized help pages** section of this page. Click on a file name to open the help file.

3. Do you want to...

- **create a new customized help file out of the default system help file you're viewing?** Go to [Creating New Customized Help Files](#).
- **edit the customized help file you're viewing?** Go to [Editing Customized Help Files](#).
- **delete a customized help file?** Go to [Deleting Customized Help Files](#).

8.3.5.1.2 Creating New Customized Help Files


This procedure creates a new customized help file.


Note: Customizing a help file overwrites the default system help file that is built in to the KnowledgeTree Document Management System. Deleting the customized file reinstates the system help.

Note: Non-administrative KnowledgeTree users have view-only access to onscreen help files. Only a KnowledgeTree system administrator is allowed to create new customized help files.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree.

2. Navigate to the section of the DMS where you want to customize the help file; then, click  to open the file.

3. Click  **Edit this help page** at the bottom of the page to open the help file editing page.

4. **Have you received a system alert warning you that a replacement file**

already exists?

- **Yes.** A system message alerts you if the customized help file already exists. You will be able to view this file in your collection of customized help files in **DMS Administration**. If you receive this message and you have not previously edited the file, you need to ensure that you are not overwriting another administrative user's customization of this file before you make your changes. If you want to continue editing the file, go to [Editing Customized Help Files](#).
- **No.** A system message informs you that a replacement file has been created. This is the new customized help file that replaces KnowledgeTree's default help file. The new file that you have created will be listed in your collection of customized help files in DMS Administration. To customize the default information, go to [Editing Customized Help Files](#).

[n](#) » [miscellaneous](#) » [help administration](#) » edit help item

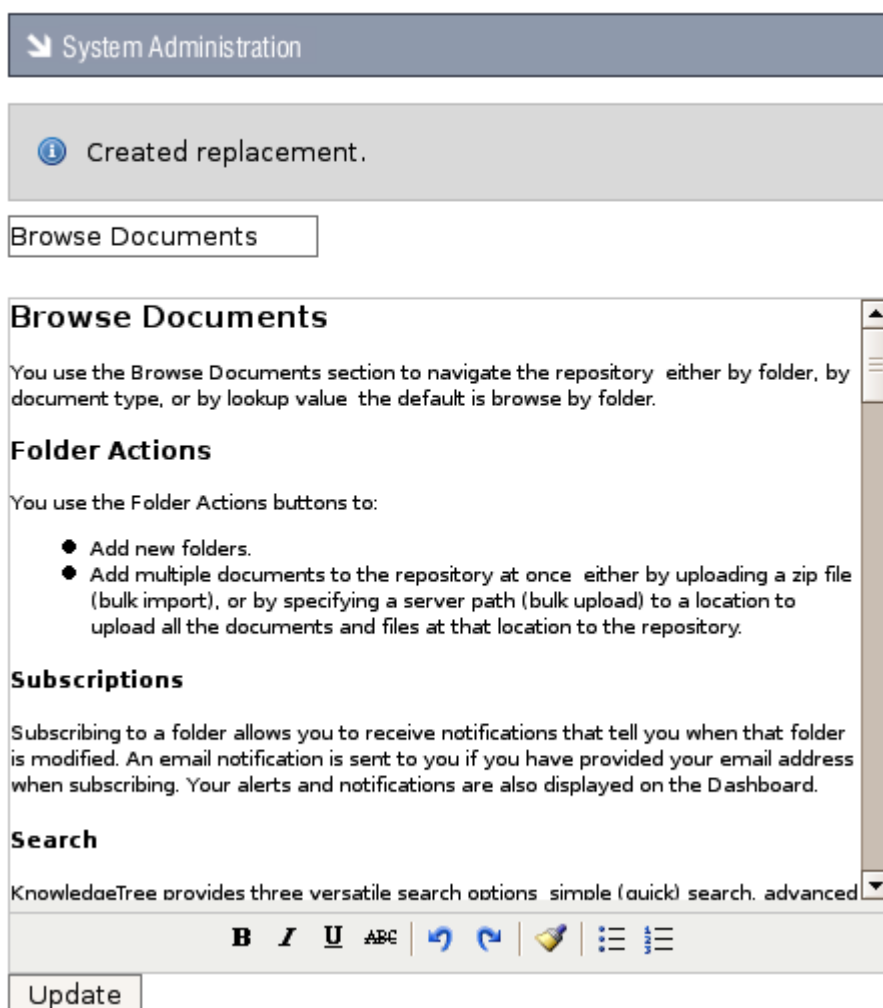


Figure: Creating a new customized help file

8.3.5.1.3 Editing Customized Help Files

This procedure edits an existing customized help file.

Note: You can only edit an existing customized help file. Changing the content of a default help file creates a new customized help file.

Note: Non-administrative KnowledgeTree users have view-only access to onscreen help files. Only a KnowledgeTree system administrator is allowed to edit existing customized help files.



Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree.

2. Do you want to modify a default system help file?

- **Yes.** Editing a default system help file creates a new customized help file. Go to [Creating a New Customized Help File](#) for more information about this task. When you're done, go to step 3.
- **No.** Go to step 3.

3. Do you want to edit a customized help file and you...

- **know which file it is, and where it is in the DMS so you can open it directly?** Open the section of the DMS where you want to edit the help; then, click  to display the help file. Scroll to the bottom of the page; then, click  **Edit this help page** to open the help file editing page. Go to step 4.
- **need to select the file from your collection of customized help files in DMS Administration?** Open the **Current help assignments** page to display the list of help files that have been customized for your organization. Click on the file name to open the file in the help file editing page. Go to step 4.

4. Change the help file text; then, click **Update** to save your changes.

Note: KnowledgeTree provides a text formatting toolbar in the help file editing page that includes the following functions: bold, italic, underline, strikethrough, redo / undo, clean up messy code, bulleted and numbered lists.

Note: The system opens the **Current help assignments** page and a system message informs you that the help file has been updated.

8.3.5.1.4 Deleting Customized Help Files

This procedure deletes the help information you customized for your organization and reinstates the default system help information.

Note: You can only delete an existing customized help file.

Note: Non-administrative KnowledgeTree users have view-only access to onscreen help files. Only a KnowledgeTree system administrator is allowed to delete a customized help file.

Perform the following steps:

1. Use your administrator credentials to open the **Miscellaneous** section of **DMS Administration**; then, click **Edit Help Files** to open the **Current help assignments** page.
2. View the list of help files that you customized for your organization in the **Existing customized help pages** section of the page.
Note: You need to have changed the content of a default onscreen help file before it will display in your collection of customized help files.
3. Click the **Delete** link in the **Actions** column for the customized help you want to remove.
*Note: When deleting a customized help file, KnowledgeTree reinstates the default help information that existed on the system before you edited the file, and the file is removed from the list in **Existing customized help pages**.*

System Administration

Current help assignments

To customise a help file, please visit that file via the help system and click on **customise this help file**.

Existing customised help pages

Name	Actions
/kthelp/ktcore/EN/browse.html	Delete
/kthelp/ktcore/EN/dashboard.html	Delete

Figure: Only customized help files are listed on the Current help assignments page

8.3.5.2 Saved Searches

KnowledgeTree's **Saved Search** feature allows you to pre-save useful, advanced searches, in order to save time on commonly used searches.

8.3.5.2.1 Creating Saved Searches

This procedure creates a saved search.

Perform the following steps:

1. Use your administrator credentials to open **DMS Administration**; then, click **Miscellaneous** in the **Administration** menu to open the **Miscellaneous** section.
2. Click **Saved Searches** to open the **Saved Searches** page.
3. Click **New** to open the **Create a new condition** page.
4. Define a name for the saved search in the **New Saved Search** field; then,

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

5. Define the criteria group in the **Criteria Group** fieldgroup:

5.1. Select **any** or **all** from the **Return items which match _ of the criteria specified below** pick list.

5.2. Select a query type from the **Criteria** pick list; then, click the adjacent **Add** button to display the **Values** field for this query type.

6. **Do you want to select another query type?**

- **Yes.** Go to step 5.2.
- **No.** Go to step 7.

7. Complete the **Values** fields for the query types you added.

8. **Do you want to create another criteria group for this saved search?**

- **Yes.** Click **Add another set of criteria**; then, go to step 5.
- **No.** Click **Save** to create the saved search.

System Administration

Create a new condition

New Saved Search:

Return items which match of the **criteria groups** specified.

Criteria Group

Return items which match of the criteria specified below.

Criteria	Values	
Document Type	<input type="text" value="Invoice"/>	<input type="button" value="Remove"/>
Workflow state	<input type="text" value="Invoice - Invoice Created"/>	<input type="button" value="Remove"/>
<input type="text" value="Name"/>	first select a type of query	<input type="button" value="Add"/>

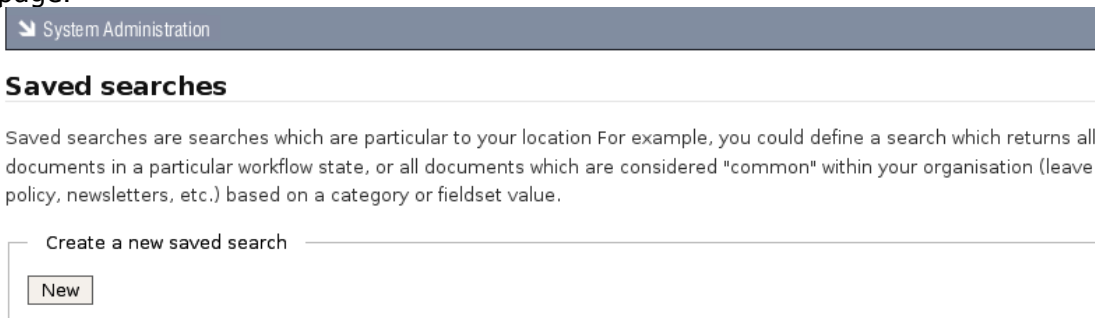
Figure: Creating the conditions for the saved search

8.3.5.2.2 Viewing / Editing / Deleting / Running Saved Searches

This procedure displays existing saved searches, and it allows you to modify or remove existing saved searches.

Perform the following steps:

1. Use your administrator login credentials to open the **Miscellaneous** section of **DMS Administration**; then, click **Saved Searches** to open the **Saved Searches** page.



Existing Searches

Search Name	Edit	Delete	View Results
reporting			Run Search

Figure: Edit, view, run, or delete an existing Saved Search

2. Do you want to...

- **view the details of a previously defined saved search?** See the list of saved searches in the **Existing Searches** section on this page.
- **edit a saved search?** Click in the **Edit** column for the relevant search, to open the **Edit an existing condition** page. For more information on completing or changing the information in the fields on this page, go to [Creating Saved Searches](#). When you're done, click the **Update Saved Search** button to save your changes.
- **delete a saved search?** Click in the **Delete** column for the search. Click **OK** on the system message that asks you to confirm the removal of this saved search.
- **search the repository, using an existing saved search?** Click the **Run Search** link in the **View Results** column for the search you're using. View the list of files and folders returned by this saved search.
Note: Search results include the following information: Document or folder title; create date; last modified date; name of file or folder creator; workflow state.
- **create a new saved search?** Go to [Creating Saved Searches](#).

8.3.5.3 Manage Plug-ins

Plug-ins allow you to add new features to your implementation of the KnowledgeTree™ Document Management System.

Note: Go to <http://support.ktdms.com/confluence/x/xq> to view a list of the plug-ins that have been developed by the KnowledgeTree community.

You use **Manage Plugins** in the **Miscellaneous** section of **DMS Administration** to:

- re-read the plug-ins list for new plug-ins that you copy to the plug-in directory
- enable plug-ins
- disable plug-ins

8.3.5.3.1 Re-reading New Plug-ins

This procedure re-reads the KnowledgeTree™ plug-in list in order to recognize a new plug-in that has been copied into the KnowledgeTree plug-in directory.

Once a new plug-in file has been copied into the plug-in directory, the system needs to re-read the plug-in list in the directory to add the plug-in to the list on the **Plugins** page in the **Miscellaneous** section of **DMS Administration**.

Plugins

Check the plugins that require activation and then click "Update". To disable a plugin, uncheck the plugin.

- ktcore.userassistance
- ktcore.plugin
- ktstandard.idapauthentication.plugin
- ktstandard.subscriptions.plugin
- ktstandard.discussion.plugin
- ktstandard.email.plugin
- ktstandard.indexer.plugin
- ktstandard.documentlinks.plugin
- ktstandard.workflowassociation.plugin
- ktstandard.workflowassociation.documenttype.plugin
- ktstandard.workflowassociation.folder.plugin
- ktstandard.bulkexport.plugin
- ktstandard.searchdashlet.plugin
- nbm.browseable.plugin

Update

Read plugins from filesystem

If you have moved the location of KnowledgeTree on your server filesystem, or installed or removed plugins, the plugin list must be re-read from the filesystem.

Reread plugins

Figure: The Plugins page in DMS Administration lists recognized plug-ins

Perform the following steps:

1. Use your administrator credentials to open **DMS Administration**; then, click **Miscellaneous** in the **Administration** menu to open the **Miscellaneous** page.
2. Click **Manage plug-ins** to open the **Plugins** page.
3. Click **Reread plugins** to add the new plug-in to the plug-ins list.
4. Verify that the new plug-in has been added to the list; then, click **Update**.
5. **Do you want to enable the new plug-in now?**
 - **Yes.** Go to [Enabling / Disabling Plug-ins](#).
 - **No.** Exit this procedure. You can enable the plug-in from the plug-in list at a later stage.

8.3.5.3.2 Enabling / Disabling Plug-ins

This procedure enables or disables plug-ins that are on the plug-in list in DMS Administration.

Note: You need to re-read the plug-in directory in order to add new plug-ins to the plug-in list.

Perform the following steps:

1. Use your administrator credentials to open the **Miscellaneous** section of **DMS Administration**; then, click **Manage plug-ins** to open the **Plugins** page.

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

• **enable one or more plug-ins on your plug-in list?** Go to step 3.

Note: If the plug-in that you want to enable is not on the plug-in list, you will need to re-read the directory where you copied the plug-in file. For more information on this task, go to [Re-reading New Plug-ins](#).

• **disable one or more plug-ins on your plug-in list?** De-select the check box adjacent to each plug-in that you want to disable for your implementation of the KnowledgeTree Document Management System; then, click **Update**.

Note: A system message informs you that your plug-ins have been updated. Disabled plug-ins remain on the list and can be enabled at any time, provided the plug-in file is not removed from the plug-in directory. If the plug-in file is removed from the directory, the plug-in will be removed from the list the next time you read from the directory.

3. Select the check box adjacent to each plug-in that you want to enable for your implementation of the KnowledgeTree Document Management System; then, click **Update**.

Note: A system message informs you that your plug-ins have been updated.

8.3.5.4 Support and System Information

8.3.5.4.1 Viewing Support and System Information

KnowledgeTree™ provides a **Support and System Information** page in the **Miscellaneous** section of **DMS Administration**, which helps you identify and fix problems with your system.

The **Support and System Information** page displays the output of a `php_info` command in a scrollable window. You may be asked to copy and send this information to the KnowledgeTree support staff if you require assistance with your issue.

Clicking the **Download PHP Information** link on this page automatically runs `php_info` and prints the results to the KnowledgeTree Document Management System.

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

with your issue.

You can also click the direct link on this page to the **KnowledgeTree Issue Tracker**, where you can:

- report bugs
- view known issues
- find out whether fixes have already been applied for your problem in a new version of KnowledgeTree

System Administration

Support and System Information

Visit the [KnowledgeTree Issue Tracker](#) first if you believe you have found a bug. Always check for known issues relating to the version you are using — we may already have found the problem you're referring to, and may have fixed it in a newer version. If we ask for your PHP_INFO data, we're looking for the information described below.

If you feel that the information presents too much specific information about your system (e.g. you feel that it would be a security risk to reveal aspects of it), please do sanitise the information, or ask us if you can mail it directly to the developer who is dealing with your issue.

[Download PHP information](#)

PHP Version 4.4.0-3ubuntu2	
System	Linux Philip 2.6.12-10-686 #1 Sat Mar 11 16:22:51 UTC 2006 i686
Build Date	Mar 8 2006 08:25:30
Server API	Apache 2.0 Handler
Virtual Directory Support	disabled
Configuration File (php.ini) Path	/etc/php4/apache2/php.ini
PHP API	20020918
PHP Extension	20020429
Zend Extension	20050606
Debug Build	no
Zend Memory Manager	enabled
Thread Safety	disabled
Registered PHP Streams	php, http, ftp, https, ftps, compress.bzip2, compress.zlib

This program makes use of the Zend Scripting Language Engine:
 Zend Engine v1.3.0, Copyright (c) 1998-2004 Zend Technologies

Powered by

Figure: Support and System Information page in Miscellaneous

8.3.6 Reporting

The **Reporting** section of DMS Administration allows you to create user activity reports.

Note: You need to allocate license keys to make the Reporting module visible and available to users of KnowledgeTree Professional.

8.3.6.1 User Reports

The **User Reporting** page of **DMS Administration** allows you to track user activity on the Document Management System. You can filter the report to list only those users who have logged in to the system over a predefined period, starting a number of weeks, months, or years, back, to the present time.

You can also view the full login history of a particular user, or of all system users.

Dashboard Browse Documents **DMS Administration** Administrator · Preferences · Logout

you are here: [administration](#) > [reporting](#) > [user reporting](#)

Administration

- [Users and Groups](#)
- [Security Management](#)
- [Document Storage](#)
- [Document Metadata and Workflow Configuration](#)
- [Miscellaneous](#)
- [Reporting](#)
- [KTIS Administration](#)

System Administration

User Reporting

Last login information

Want to know when last users of your system logged in? You can get an overview of the last login times of all users, or of users that have or have not logged in recently.

Show all users

Show users that logged into the system in the last

Full login history for users

Since there may be many users in the system, please select a user from the list below, or type a few letters from the person's username to begin. Alternatively, [view all users](#) (note that this may be very slow if you have many users).

Username

Enter part of the person's username. e.g. ra will match brad.

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Figure: User Reporting page

8.3.7 KTIS Administration



You use the **KTIS Administration** section of DMS Administration to manage keys.

Note: This section is only visible to users of **KnowledgeTree Professional**. For more information about **KnowledgeTree Professional**, visit <http://www.ktdms.com/>

Note: License keys are required for using KnowledgeTree Tools for Windows (KTtools). Users who do not have keys will not be able to use **KTtools**, but they can still use the Web interface to open and work within the KnowledgeTree Document Management System.

Note: When upgrading from KnowledgeTree Open Source to KnowledgeTree Professional using the KnowledgeTree Professional Upgrade Installer, you may need to [reread the plugins list](#) to view the KTIS section of DMS Administration.

Managing keys involves:

- [adding / uploading new keys](#)

- viewing a list of the license keys currently active for your organization
- allocating keys to users
- removing keys from a specified user

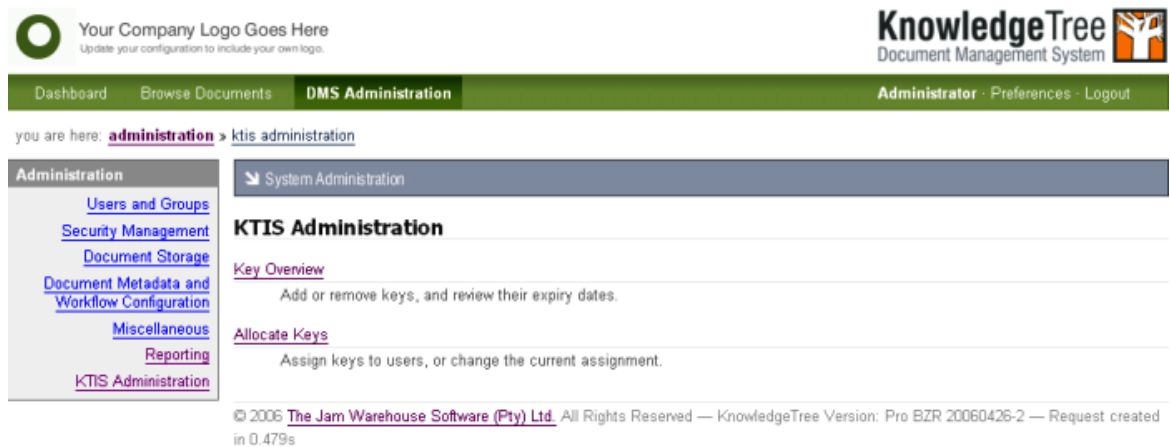


Figure: KTIS Administration Section

8.3.7.1 Key Overview

You use the **Key Overview** page in **KTIS Administration** to:

- view currently active license keys - including expiry dates
- add new license keys for your organization - from your local computer, or from the KnowledgeTree website.

Note: License keys are required for using KnowledgeTree Tools. Users who do not have keys will not be able to use KnowledgeTree Tools for Windows, but they can still use the Web interface to open and work within the KnowledgeTree Document Management System.

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you are here: [administration](#) > [ktis administration](#) > [manage keys](#)

Administration

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- [Miscellaneous](#)
- [Reporting](#)
- [KTIS Administration](#)

System Administration

Key Overview

Access via Windows Tools services requires that the user be allocated one of the organisation's keys.

Add new key

If you've purchased a new key from [ktdms.com](#), you can upload it here.

Below you can see a list of the keys that are currently active for your organisation.

Licenses	Expires	Granted to
10	2006-04-30 12:46:00 — This key expires within 45 days.	Beta Test Corporation

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Figure: Key Overview Page in KTIS Administration

8.3.7.2 Allocate Keys

You use the Allocate Keys page in **KTIS Administration** to:

- find out whether or not a specified user has been allocated a license key for using KnowledgeTree Tools
- view the license key status of all users
- add or remove license keys

Note: License keys are required for using KnowledgeTree Tools. Users who do not have keys will not be able to use KnowledgeTree Tools for Windows, but they can still use the Web interface to open and work within the KnowledgeTree Document Management System.

Dashboard Browse Documents **DMS Administration** Administrator Preferences Logout

you are here: [administration](#) > [ktis administration](#) > [allocate keys](#)

Administration

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- [Miscellaneous](#)
- [Reporting](#)
- [KTIS Administration](#)

System Administration

Allocate Keys

In order for users to login to the KnowledgeTree Integration Server using the Windows Tools, they must be allocated a key. Keys are available for purchase from our online store. You currently have **10** licenses installed in this server, and of those **9** are currently not allocated to users.

You can remove a key from a given user at any time, and can re-allocate that key to someone else. To do that, search for and select the user below, and click the "delete" icon next to their name.

Search for Users with active keys

Since there may be many users in the system, please select a group from the list below, or type a few letters from the person's username to begin. Alternatively, [view all users](#) (note that this may be very slow if you have many users).

Username ■
Enter part of the person's username. e.g. ra will match brad.

Figure: Allocate Keys Page

8.3.7.3 Adding / Allocating Keys

This procedure manages the license keys you purchase for using KnowledgeTree™ Professional.

Perform the following steps:

1. Use your administrator login credentials to open the **DMS Administration** section of the KnowledgeTree Document Management System.
2. Click **KTIS Administration** in the **Administration** menu.
3. **Do you want to...**
 - **view a list of your currently active keys?** Click **Key Overview** to open the **Key Overview** page. View a list of your currently active keys on this page, where you can find the following information: number of currently active keys; expiry date; number of days to expiry; name of the organization that owns these keys.
 - **add new keys?** Click **Key Overview** to open the **Key Overview** page. Click **Browse** to locate the key; select the key to populate the text field; then, click **Add License**.
 - **view a list of all users to find out which users currently have license keys?** Click **Allocate Keys** to open the **Allocate Keys** page. Click **view all users** in the **Search for Users with active keys** section. View the list of users with active keys that displays at the bottom of this page.
 - **find out whether a specific user already has a license key?** Click **Allocate Keys** to open the **Allocate Keys** page. Type the user's username - or part of the username - in the **Username** field; then, click **search for users**. The

user's license key information displays at the bottom of the page.

- **allocate keys to a key to one or more users?** Click **Allocate Keys** to open the **Allocate Keys** page. Search for users to display user information on the page. Select the **Allocate Key** check box for any user for which you want to allocate keys. Click **Apply Changes**.
- **remove keys from one or more users?** Click **Allocate Keys** to open the **Allocate Keys** page. Search for users to display user information on the page. Select the **De-Allocate Key** check box for any user from whom you need to remove a key. Click **Apply Changes**.