

Administrator Manual

Commercial 1.*

OSS 3.*



KnowledgeTree
Document Management System

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

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

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2 Preface

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

Please Note:

This document is a working draft that is continually being updated. We welcome your contributions to help us document KnowledgeTree. Please post your comments and suggestions by creating a 'Documentation' ticket for the KnowledgeTree project on <http://issues.knowledgetree.com>.

For more information about using KnowledgeTree please visit the KnowledgeTree website at <http://www.knowledgetree.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 support for **KnowledgeTree Commercial Editions** - KnowledgeTree **SMB** Edition, and KnowledgeTree **Enterprise** Edition. Support for **KnowledgeTree Commercial** provides you with priority access to our support staff and developers.

Find out more about support and subscriptions for **KnowledgeTree SMB Edition and KnowledgeTree Enterprise Edition** at the KnowledgeTree website - <http://www.knowledgetree.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.knowledgetree.com/>, where our support staff, developers, and a wide number of KnowledgeTree community members, endeavor to answer questions around installing, managing, and using the KnowledgeTree Document Management System.

Important

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

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 requirements, such as the [Sarbanes-Oxley Act \(SOX\)](#), [SEC Rule 17a-4](#) and [FDA 21CFR11](#).

There are three editions of the KnowledgeTree Document Management System:

- KnowledgeTree Open Source Edition - free to download
- KnowledgeTree SMB Edition
- KnowledgeTree Enterprise Edition

KnowledgeTree SMB Edition and **KnowledgeTree Enterprise Edition** are known collectively as [KnowledgeTree Commercial Editions](#).

KnowledgeTree Commercial Editions are the certified versions of the [Open Source Edition](#), offering extended functionality, and including a set of tools that provide a familiar Windows® Explorer and Microsoft® Office® view of the document repository.

Features summary

KnowledgeTree provides:

- Easy-to-use Web interface - accessible with all KnowledgeTree Editions, or access the repository from within Microsoft Office applications (only available with KnowledgeTree Commercial)
- Central document repository with audited document content version control
- Powerful document metadata management and versioning
- Sophisticated document authoring management, workflow engine, and notifications
- Full-text indexing technology allows search within document contents
- Powerful security group and role-based security model and integration with Directory Servers
- Outlook integration (KnowledgeTree Commercial) - save emails and attachments directly to the repository; attach files in the repository to outgoing email messages
- Scan documents directly into the repository (KnowledgeTree Commercial)

For more information on the **KnowledgeTree feature set**, see the latest KnowledgeTree [brochure](#) at the KnowledgeTree website.

5.1 Overview

5.1.1 Implementing KnowledgeTree DMS

A planned implementation is essential for ensuring the success of your KnowledgeTree installation.

The implementation plan requires an understanding of the basic elements of the system. You should understand how the repository is secured, and how users, groups, and roles should access and work with content in the repository. Users and Permissions are two important concepts in a document management system. Consider an intuitive, yet secure, way of structuring the repository. KnowledgeTree provides the means to define a taxonomy that best maps to your organizational structure and processes.

Pre-requisite:

- Review KnowledgeTree permissions
- Define an organizational taxonomy
- Define a folder structure with best fit to the taxonomy and the permissions model, in order to provide the greatest level of control and security

Note: In the following task list, **optional** tasks are indicated by *.

Implementation Task List:

1. [Log in](#) as administrative user

1.1. If this is the first time you're logging in after installing the system, use the default Admin username and password to log in to the system.

1.2. Having logged in, change the default Admin password.

2. [Check licenses](#)

2.1. Verify that the correct license is installed - SMB or Enterprise.

3. [Configure Plugins](#)

3.1. Select / deselect from the Plugins list as required.

3.2. Enable Plugins.

4. [Set up the repository](#)

4.1. Define Metadata and [Document Types](#)

4.1.1. Add document types

4.1.2. Create [document fieldsets](#)

4.1.3. Associate / disassociate custom fieldsets and pre-defined document types

4.1.4. enable document types

- 4.1.5. add [fields](#)
- 4.1.6. manage tree fields
- 4.1.7. create document [link types](#) **

4.2. Create the Folder Structure

5. **Configure [Workflows](#)**

- 5.1. Add Custom Workflows
 - 5.1.1. create states
 - 5.1.2. create transitions
 - 5.1.3. create workflow actions (effects) **
- 5.2. Enable Workflows.
- 5.3. Set up automatic workflow assignment by document type **

6. **Import Documents to the repository - [import from Server](#)**

7. **Perform other Administrative Tasks:**

- 7.1. Create [saved searches](#). **
- 7.2. Configure [views](#) - add/remove columns. **
- 7.3. Add / edit [disclaimer text](#).
- 7.4. Add / edit Dashboard [quicklinks](#).

8. **Add [Users and Groups](#)**

- 8.1. Add users
 - 8.1.1. manually, or;
 - 8.1.2. from an external authentication source (if you have LDAP/AD server)
- 8.2. Create User Groups
- 8.3. Create organizational Units
- 8.4. Create Roles **

9. **[Define Permissions](#)**

- 9.1. Accept default Permissions set and/or add custom permissions

10. **Create User Profiles** (e.g. add users to groups, etc.)

11. **Configure [Permissions](#)**

12. **Configure [Roles](#)**

13. **Install KTtools**

- 13.1. Network Install; or,
 - 13.2. Manual Install
- Note:** See *KnowledgeTree Install Guide* for more information.

14. **User Training**

- E.g. Users log in, users assign Workflows, and other Getting Started training (basic and advanced tasks, depending on audience).

Note: See KnowledgeTree User Manual for more information on KnowledgeTree tasks.

5.1.2 Defining a Taxonomy

When implementing a Document Management System for your organization, an important first step involves defining the taxonomy that outlines how you intend to organize, categorize, classify, and generally arrange the documents in your system.

Note: In terms of organizing content in the KnowledgeTree DMS, a taxonomy may be defined as a hierarchical structure of parent-child relationships.

5.1.3 Advanced Configuration: Editing KnowledgeTree Config.ini

The `config.ini` file (located in the KnowledgeTree folder) contains configuration information for all KnowledgeTree Document Management System installations (for Windows or Linux).

You change the settings in `config.ini` in any text editor, such as Notepad. All values in the file are editable.

Note: *We recommend that only authorized, experienced administrative users should attempt to change variables in config.ini. Incorrect configurations may introduce errors in your system.*

Configuration Variables

[db]

You will need to change at least some of these settings (such as the default username and password that is created during installation).

- **Database type**

Note: *At the time of writing (July 2006), mysql is the only supported database type.*

```
dbType = mysql
```

- **Database Login Details**

Note: *These are the MySQL database usernames and passwords. You may need this information when backing up your database or upgrading.*

```
dbHost = localhost
dbName = dms
dbUser = dms
dbPass = admin
dbPort = default
dbAdminUser = dmsadmin
dbAdminPass = admin
```

[KnowledgeTree]

KnowledgeTree automatically detects the default settings for these variables.

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

Note: Leave the default to have this automatically detected.

```
fileSystemRoot = default
```

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

Note: Leave the default to have this automatically detected.

```
serverName = default
```

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

Note: Leave the default to have this automatically detected.

```
sslEnabled = default
```

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

i.e. if KnowledgeTree is at `http://example.org/foo/`, then `rootUrl` should be `/foo`

Note: Leave the default to have this automatically detected.

```
rootUrl = default
```

- **Defines whether the platform supports PATH_INFO**

The current default is true.

```
pathInfoSupport = default
```

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

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

```
execSearchPath = default
```

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

The default is INFO.

```
logLevel = INFO
```

[storage]

Important: Do not change the default.

- **The plugin that manages storage of documents on the file system**

The default is `KTONDiskHashedStorageManager`

```
manager = KTONDiskHashedStorageManager  
manager = default
```

[ui]

These variables define the custom logo you add to the interface.

- **Logo requirements**

The Logo must be 50px tall, on a white background

```
companyLogo = ${rootUrl}/resources/companylogo.png
```

- **The width of the logo, in pixels**

```
companyLogoWidth = 313px
```

- **Alternative text for the logo, for accessibility purposes**

```
companyLogoTitle = ACME Corporation
```

- **IE-specific GIF theme overrides**

You can use the additional IE-specific GIF theme overrides, but this may prevent arbitrary theme packs from working without having GIF versions available.

```
ieGIF = true  
ieGIF = default
```

- **Do not restrict to searches on users and groups pages**

e.g. `always show_all`

```
alwaysShowAll = false  
alwaysShowAll = default
```

- **Automatically Refresh the Page**

Set to `true` to automatically refresh the page after the session would have expired.

```
automaticRefresh = default
```

- **Defines whether to use a condensed admin user interface**

Note: *The condensed administrative interface is a more compact version of the administrative interface.*

```
condensedAdminUI = default
```

[i18n]

- **Internationalization**

Defines the language for the interface. Default is English.

```
defaultLanguage = en
```

- **Search Ideographic Language**

If your language does not have distinguishable words (typically, there is no space character), you need to set `useLike` to `true` to enable the Search function capable of dealing with this issue - please note that this Search is effective, but slower.

```
useLike - default
```

[tweaks]

- **Enabling PHP Error Logging**

Change this variable to `true` to enable PHP error logging to the **log/php_error_log** file.

```
phpErrorLogFile = false
```

- **The default displays the root folder (first unit) as soon as the user clicks Browse Documents**

- i.e. the user is taken directly to their unit folder

```
browseToUnitFolder = default
```

- **Whether bulk operations should generate a transaction notice on each item, or only on the folder.**

The default (`false`) indicates that only the folder transaction should occur.

```
noisyBulkOperations = false
```

[email]

Defines email settings and enables the email feature for your installation of KnowledgeTree.

- **Your mail server address**

The default is `none`.

```
emailServer = none
```

- **The mail port for your Server**

The default is 25.

```
emailPort = default
```

- **Whether authentication is required for connecting to SMTP**

***Note:** Setting this variable to `true` forces the user to log in using a user name and password, and requires that you configure this setting.*

```
emailAuthentication = false
```

- **The user name and password required for authentication**

(see `emailAuthentication`)

```
emailUsername = username  
emailPassword = password
```

```
emailFrom = kt@example.org  
emailFromName = KnowledgeTree Document Management System
```

- **Sending attachments from the DMS**

Set this variable to `true` to allow users to send attachments from the document management system.

```
allowAttachment = default
```

- **Allow sending of emails to any email address**

Set this variable to `true` to allow KnowledgeTree system users to send email to any email address - to other KnowledgeTree users and to external users.

```
allowEmailAddresses = default
```

- **Always send mail from ...**

Set this variable to `true` to always send email from the **emailFrom** address listed above, even if the sending user is unidentifiable.

```
sendAsSystem = default
```

- **Users sending email only in their group**

Set to `true` to enable `onlyOwnGroups`.

```
onlyOwnGroups = default
```


[urls]

- **The directory where KnowledgeTree stores information on your repository - i.e. logs**

Important: Do not change this variable unless you are an authorized and experienced administrative user, and you understand the implications of changing this information.

```
varDirectory = C:\ProgramFiles\ktdms/var
logDirectory = ${varDirectory}/log
documentRoot = C:\Program Files\ktdms/Documents
uiDirectory = ${fileSystemRoot}/presentation/lookAndFeel/
knowledgeTree
tmpDirectory = ${varDirectory}/tmp
```

- **The location of all images used in KnowledgeTree**
e.g. the question mark used for the Help page.

```
graphicsUrl = ${rootUrl}/graphics
uiUrl = ${rootUrl}/presentation/lookAndFeel/knowledgeTree
```

[session]

- **The period of time (in seconds) after which the system times out following a period of inactivity**

```
sessionTimeout = 1200
```

- **Whether to automatically allow log in of users as Anonymous**

The default is `false`.

Note: To protect your system, it is highly recommended that you do not change the default to `true` to allow anonymous login, even if you understand KnowledgeTree security, and you have sensibly applied the roles 'Everyone' and 'Authenticated ' Users.

```
allowAnonymousLogin = false
```

- **IP address for sessions**

Change this setting to `true` if you want to force sessions to come from the same IP address.

```
ipTracking = false
```

[import]

- **Location of the unzip binary**

The unzip command uses `execSearchPath` to find the location of your

unzip binary, if the path to the binary is not given.

```
unzip = C:/Program Files/ktdms/bin/unzip/unzip.exe
```

[export]

- **Location of the zip binary**

The zip command uses **execSearchPath** to find the location of your zip binary, if the path to the binary is not given.

```
zip = C:/Program Files/ktdms/bin/zip/zip.exe
```

[indexer]

- **Location of 3rd party indexer binaries**

Indexer commands use **execSearchPath** to find the location of 3rd party indexer binaries, if the path to the binary is not given.

```
xls2csv = C:/Program Files/ktdms/bin/catdoc/xls2csv.exe  
pdftotext = C:/Program Files/ktdms/bin/xpdf/pdftotext.exe  
catppt = C:/Program Files/ktdms/bin/catdoc/catppt.exe  
pstotext = pstotext  
catdoc = C:/Program Files/ktdms/bin/catdoc/catdoc.exe  
antiword = C:/Program Files/ktdms/bin/antiword/antiword.exe
```

[user_prefs]

- **The minimum length on password-setting**

```
passwordLength = 6
```

- **Length of password for admin user**

Defines whether to apply the minimum password length to administrative users who are creating / editing accounts. The default is `false`, which allows administrative users to create users with shorter passwords.

```
restrictAdminPasswords = default
```

- **Whether to restrict users from accessing their Preferences menus**

```
restrictPreferences = false
```

[builtinauth]

Configures the built-in authentication provider.

- **The number of days after which users who use the built-in authentication provider are forced to change their password.**

```
password_change_interval = 30
```

[cache]

- **The location of the cache, and whether or not caching is enabled.**

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

[BaobabSettings]

Note: At the time of writing (August 2006) these settings are not enabled or configurable in *config.ini*.

- These settings (defaults displayed) are currently stored and configured in **baobab.config** and may reside in this configuration file at a later release of KnowledgeTree Document Management System.

```
debug = off
safemode = on
```

5.1.4 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** - Units are the top level folders that 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. The Unit Administrator has administrative privileges on the Unit/s where they have been assigned administrative privileges.

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).

5.1.5 Administrator Mode

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

Administrators may be denied access to certain documents in the repository - for example, management level documents containing classified information. 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.

Note: An Administrative user will not be allowed to delete **immutable** documents using the **Delete** button in **Browse Documents**, even if they're working in Administrator mode. To delete an immutable document, you will need to use the **Delete** action from that immutable document's **Document Detail** page. This ensures that immutable documents are only deleted one at a time, and avoids the mistaken deletion of an immutable document in a mass action delete.

Enabling / Disabling Administrator Mode

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

The screenshot displays the 'Browse Documents' interface. On the left, a 'Folder Actions' sidebar lists various options like 'Add Document', 'Add a Folder', 'Permissions', 'Import from Server Location', 'Bulk upload', 'Folder transactions', 'Allocate Roles', 'Bulk Export', and 'Usage Information'. The main content area shows a notification 'Administrator mode enabled' and a table with columns for 'Title', 'Created', 'Modified', 'Creator', and 'Workflow State'. A single row is visible with the title 'Acme Corporation'. Below the table, it indicates '1 items, 25 per page' and provides 'Delete' and 'Move' buttons. At the bottom, there is a search bar and a footer with copyright information: '© 2006 The Jam Warehouse Software (Pty) Ltd. All Rights Reserved — KnowledgeTree Version: Professional 1.1-r4 — Request created in 0.854s'. A separate 'Administrator mode' panel on the left shows 'Administrator mode is enabled' and a 'Disable Admin Mode' button.

Figure: Enabling Administrator mode in Browse Documents

5.1.6 Troubleshooting

Poor Performance on Certain Windows Installations Possibly Resulting from Cache Malfunction

Currently (November 2006), this issue is still under investigation. If you are experiencing poor performance on certain Windows installations, try disabling the cache.

5.1.7 Permissions

The KnowledgeTree™ Document Management System repository is secured through **Document Permissions**.

Each action that can be performed on a document or folder requires the user to have been allocated the permission to perform that action.

Core Permissions

KnowledgeTree includes the following set of standard (or core) permission types:

- **Read** – allows you to view the document and its metadata, but you won't be able to modify the document or its metadata. Search and browse functions do not list a document in search results or in the folder view to users who do not have 'read' permission for that document.
- **Write** – allows you to change the content of a document and its metadata, perform check out and check in, or create new documents in folders where you have the 'write' permission.
- **Add Folder** – allows you to create and edit folders where you have this permission on the parent folder.
- **Manage Security** - allows you to control the security of the folder and its content, including edit permission and role allocations.
- **Delete** – allows you to delete any file or folder where you have this permission on the parent folder.

***Note:** An Administrative user will not be allowed to delete **immutable** documents using the **Delete** button in **Browse Documents**, even if they're working in Administrator mode. To delete an immutable document, you will need to use the **Delete** action from that immutable document's **Document Detail** page. This ensures that immutable documents are only deleted one at a time, and avoids the mistaken deletion of an immutable document in a mass action delete.*

- **Manage Workflow** – users are allowed to change the workflow settings on a document (e.g. perform a transition).
- **View Folder Details** – users are allowed to see the name of the folder, the transaction history, and other details linked to the folder name.

Using Permissions in KnowledgeTree

View / Add New Permissions

The system administrator uses the **Security Management** link on the **Administration** menu in **DMS Administration** to create [new permissions](#), or to delete permissions. Non-administrative users use the **Permissions** link on the **Folder Actions** menu in Browse Documents to view permissions set up for specific folders.

Note: Whereas document permissions are used in KnowledgeTree, file permissions are an operating system construct - file permissions control which files the operating system users can access on the file-system. File permissions do not map to document permissions within KnowledgeTree - there is no relation between these two concepts.

Assigning Permissions

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

• **Folder Permissions**

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. Any changes to the permissions of the parent folder are passed down to the sub folders.

Users are allowed to override the parent permissions, but 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 Permissions**

KnowledgeTree allows you to assign permissions to a specific role - e.g. developer - and then to add groups (a project team for example), to the role. In this way, the permission of the role is given to one or more groups. Role permissions are useful for workflows, because workflows are typically created for the role, and not for the group.

• **Group Permissions**

Folder permissions are granted by group.

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

5.1.7.1 **KnowledgeTree Permissions Concepts**

Permission Object

A **Permission Object** stores permissions on items in the DMS.

Permission Assignments

The **Permission Object** links the item with a number of **Permission Assignments** - there is one Permission Assignment per permission. A Permission Assignment is uniquely specified by a Permission Object and a Permission.

Permission Descriptor

A **Permission Descriptor** is the final component in the KnowledgeTree permissions system. A Permission Descriptor describes the groups, users, or roles that have that permission on a Permission Object.

A particular collection of groups, users, and roles are described by a unique Permission Descriptor.

Permission Lookup

Permission Lookup objects - an expanded form of Permission Object - describe the collections of groups and users that have each permission on the item in the repository. If an owner role has a permission in terms of the permission object, the exact user with that role on that object is mentioned in the Permission Lookup.

The main purpose of Permission Lookups is to return search results based the permissions of the user performing the search - especially content and metadata searches, where results must be restricted to documents where the user has at least read permissions.

Managing Permissions

Permission Lookups use descriptors that never expand groups. Changes in group membership do not require permission lookups. When using Permission Lookups, users have access to descriptors that are looked up first at run-time, and these are used to restrict searches.

By default, newly created folders and documents inherit the **Permission Object** of the parent folder; thereafter, they update their own Permission Lookups. Documents that change their Permission Object they update their own Permission Lookups.

5.1.8 Default 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 you have completed the installation, once you have obtained access to the DMS in order to change the password.

Note: See [Manage Users](#) in this document for more information about adding / editing passwords.

5.1.8.1 Manually Restoring the Default Admin

This procedure restores the default admin username and password that are set up during installation.

KnowledgeTree does not have a password resetting system that allows you to retrieve forgotten passwords - you can only 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.

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**

5.1.9 Login

5.1.9.1 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.

5.1.9.2 Login to the Web-Interface DMS

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

Note: Only users who have been added to the system and enabled in the **Users and Groups** section of **DMS Administration** are able to login to the DMS. Users are enabled by default when they're added to the system. A KnowledgeTree SMB Edition subscription allows you to enable a maximum of 20 users at any one time. You can enable and disable user profiles to allow access to different users. If you require access to KnowledgeTree Commercial Edition for more than 20 enabled users at any one time, you need to upgrade your KnowledgeTree Commercial Edition SMB subscription to KnowledgeTree Enterprise.

You can add and enable an unlimited number of users with KnowledgeTree Open Source Edition and with a KnowledgeTree Enterprise subscription, but you will only have access to premium functionality with a KnowledgeTree Commercial Edition subscription - SMB or Enterprise.

Note: KnowledgeTree Commercial Edition subscriptions - both SMB and Enterprise - include extended functionality and Support.

Perform the following steps:

1. Use your 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.
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

5.1.9.3 Login 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.

Note: KnowledgeTree Explorer is a component of KnowledgeTree Commercial Editions - SMB and Enterprise. A **KnowledgeTree SMB Edition** subscription allows permissions-based access to the KnowledgeTree repository (via KnowledgeTree Explorer or via the Web Interface) to up to **20** named, active users, plus the default admin user, and, if configured in the system, to any anonymous user.

A **KnowledgeTree Enterprise Edition** subscription allows permissions-based access to the repository (via KnowledgeTree Explorer or via the Web Interface) to an **unlimited** number of users. See also the KnowledgeTree Editions [Comparison Matrix](#).

For any of the KnowledgeTree editions, a default admin user is created during the installation, and should be reset immediately after the installation is complete. The administrator can configure the system to allow or disallow anonymous users, and defines permissions that protects content in the repository from unauthorized viewing.

Prerequisites:

You will need *all* of the following:

- KnowledgeTree Commercial Edition Installed - one Installer for SMB or Enterprise
- KnowledgeTree Commercial Edition subscription - SMB or Enterprise
- KnowledgeTree Tools installed
- Valid connection configured with the KnowledgeTree server
- Your administrator profile added to the system and enabled

Perform the following steps:

1. Click the KnowledgeTree Explorer icon 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.

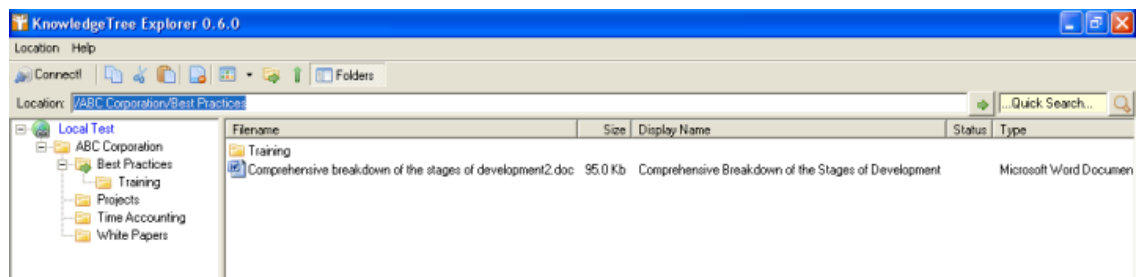


Figure: KnowledgeTree Explorer - files and folders loaded

5.2 KnowledgeTree Editions

5.2.1 KnowledgeTree Editions Comparison Matrix

Environment

Features	KnowledgeTree Commercial Editions		KnowledgeTree Open Source
	KnowledgeTree SMB <i>Suitable for small to medium-sized organizations and departmental use.</i>	KnowledgeTree Enterprise <i>Suitable for large and medium-sized organizations</i>	<i>Suitable for experienced early adopters and open source development community use.</i>
Certified, Tested Server	Yes	Yes	No
Easy-to-use Web interface	Yes	Yes	Yes
Distributed as Optimized Bytecode	Yes	Yes	No
Quality Assured	Yes. Internal QA engineers, based on stable community code	Yes. Internal QA engineers, based on stable community code	Community driven.
Release Interval	Quarterly	Quarterly	Often
Extended Functionality			
Drag and drop and document management direct from Microsoft Windows Desktop	Yes	Yes	No
Integration with Microsoft Office applications	Yes	Yes	No
Scan documents into the repository	Yes	Yes	No
Access documents from popular 3rd-party WebDAV clients	Yes	Yes	No
Extended Management Reporting and Web application functionality	Yes	Yes	No
Support and Licensing			
Support	Priority Support 12 Commercial Support Cases per year	Priority Support 22 Commercial Support Cases per year	None (Community Supported)

Number of Supported Users	20	Per CPU subscription, unlimited users	Unlimited
Annual Subscription Fee	US\$2200	US\$5500 per CPU	Free

Note: Please check the KnowledgeTree website for updates to this comparison matrix.

5.2.2 KnowledgeTree Open Source Edition

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 for evaluation and use at no cost. KnowledgeTree Open Source is suitable in many document and records management scenarios.

5.2.3 KnowledgeTree Commercial Editions

KnowledgeTree SMB Edition and **KnowledgeTree Enterprise Edition** are known collectively as **KnowledgeTree Commercial Editions**.

KnowledgeTree Commercial Editions are the certified versions of KnowledgeTree Open Source Edition, offering extended functionality through components that provide a familiar Windows® Explorer and Microsoft® Office® view of the Web-based document repository.

KnowledgeTree Commercial Editions - Components:

- **KnowledgeTree Integration Server (KTIS)** - a server component that allows you to log in to the web-interface DMS through KnowledgeTree Explorer.
- **KnowledgeTree Client Tools for Windows (KTtools)** - a set of client-side tools for Windows users that allow you to work with content in the repository as though you're working on your local computer.

Note: A **KnowledgeTree SMB Edition** subscription provides access, at any one time, to a maximum of **20** named, active, and enabled users - excluding the default admin user and any anonymous users. A **KnowledgeTree Commercial Enterprise** subscription provides access to an **unlimited** number of enabled users. Click [here](#) to view the full product comparison matrix.

5.2.3.1 KnowledgeTree Integration Server (KTIS)

KnowledgeTree™ Integration Server (KTIS) is a server-side component for KnowledgeTree Commercial Editions that provides a standards-based WebDAV interface into the KnowledgeTree Document Management System.

KnowledgeTree Integration Server is complemented by [KnowledgeTree Tools \(KTtools\)](#) - a set of client tools for Windows - plus a number of plugin products that extend the utility of the server for specific tasks.

If you have a **KnowledgeTree Commercial Edition** subscription - **SMB** and **Enterprise** - you can log in to the Web-based DMS through **KTIS**, and work with content in the repository within KnowledgeTree Explorer, using **KTtools**.

Note: *KTIS and KTtools are components of the KnowledgeTree Commercial Editions - SMB and Enterprise. A KnowledgeTree SMB Edition subscription allows permissions-based access to the KnowledgeTree repository (via KnowledgeTree Explorer or via the Web Interface) for up to 20 named, active users, plus the default admin user, and, if configured in the system, to any anonymous user.*

A KnowledgeTree Enterprise Edition subscription allows permissions-based access to the repository (via KnowledgeTree Explorer or via the Web Interface) to an unlimited number of users, including the default admin user, and, if configured in the system, any anonymous user. See also the KnowledgeTree Editions [Comparison Matrix](#).

Note: *The default admin user is created during the installation, but it should be reset immediately after the installation is complete. The admin user can configure the system to allow or disallow anonymous users, and defines permissions that protects content in the repository from unauthorized viewing.*

5.2.3.2 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: *KTtools is a component that is only available in KnowledgeTree Commercial Editions - KnowledgeTree SMB Edition and KnowledgeTree Enterprise Edition.*

KnowledgeTree Tools comprises:

- [KnowledgeTree Explorer for Windows](#) - an Explorer-type application that provides a file browser view of the document repository.
- [KnowledgeTree Office Add-in for Microsoft Office](#) - a Microsoft Office add-in that adds a button to the toolbar in Microsoft Office, in order to provide access to KnowledgeTree functionality from within Microsoft Office applications.
- [KnowledgeTree Desktop Imaging](#) - a tool that allows you to scan documents directly into the KnowledgeTree repository from within KnowledgeTree Explorer.

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](#).

5.2.3.2.1 3rd Party WebDAV Clients

At the time of writing (November 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. For more information on the various WebDAV clients, go to

<http://www.greenbytes.de/tech/webdav/webfolder-client-list.html>

5.2.3.2.2 KnowledgeTree Explorer for Windows

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

You can 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.

Note: KnowledgeTree Tools for Windows is only available in KnowledgeTree Commercial

Editions - SMB or Enterprise.

5.2.3.2.3 KnowledgeTree Office Add-in

The **Office Toolbar** plugin inserts toolbar buttons and a KnowledgeTree menu in Microsoft Office XP/2003 applications to provide quick access to the KnowledgeTree repository. This allows you to work with KnowledgeTree from within your Microsoft Office application.

- save a document directly to KnowledgeTree
- locate a document in KnowledgeTree
- login to the Web interface DMS
- browse the repository



Figure: Office Toolbar buttons

5.2.3.2.4 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**.

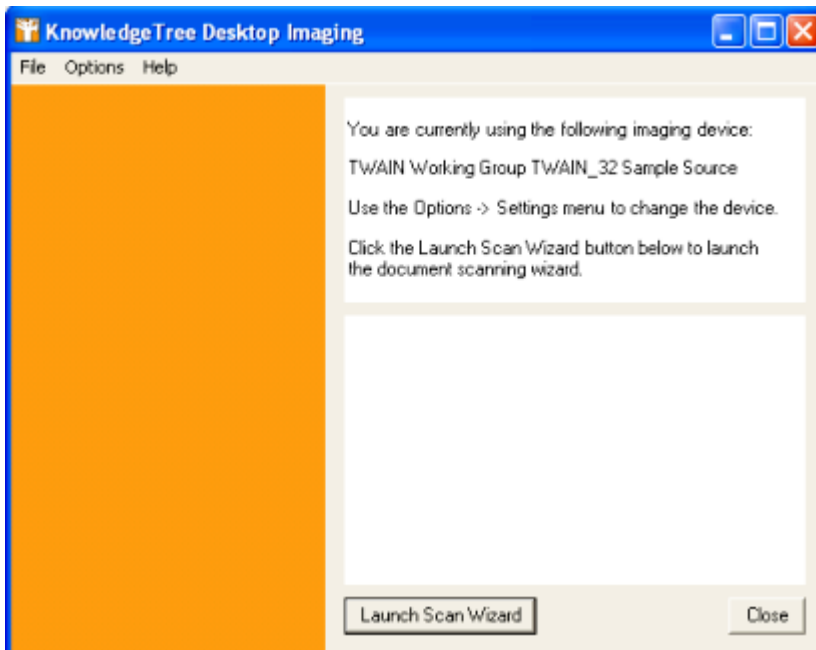


Figure: KnowledgeTree Desktop Imaging Scan Wizard

6 Working with KTtools

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 plugin.

Note: *KTtools is a component that is only available in KnowledgeTree Commercial Editions - KnowledgeTree SMB Edition and KnowledgeTree Enterprise Edition.*

6.1 Working in KnowledgeTree Explorer

KnowledgeTree Explorer is a tool in the KnowledgeTree™ Client Tools for Windows (KTtools) toolset that provides a familiar Explorer-type view of the Web-based KnowledgeTree Document Management System repository. KnowledgeTree Explorer allows you to work with content in the 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**.

Note: *KTtools is a component that is only available in KnowledgeTree Commercial Editions - KnowledgeTree SMB Edition and KnowledgeTree Enterprise Edition.*

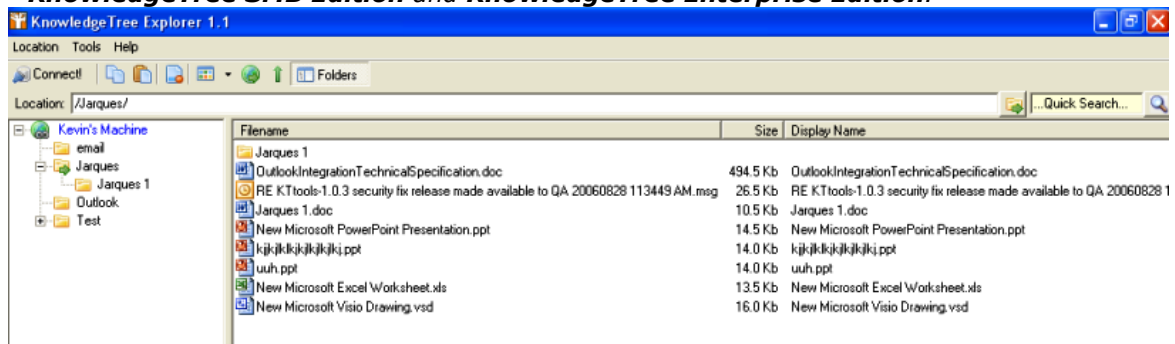


Figure: KnowledgeTree Explorer Interface

7 Inside the DMS

7.1 Dashboard

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

Note: A subscription for the **KnowledgeTree Commercial Editions - SMB or Enterprise** - provides access to KnowledgeTree Integration Server and KnowledgeTree Tools (KTtools), plus extended functionality in the Web Interface of the KnowledgeTree DMS.

Important

- A **KnowledgeTree SMB Edition** subscription allows permissions-based access to the KnowledgeTree repository (via KnowledgeTree Explorer or via the Web Interface) to up to **20** named, active users, plus the default admin user, and, if configured in the system, to any anonymous user.
- A **KnowledgeTree Enterprise Edition** subscription allows permissions-based access to the repository (via KnowledgeTree Explorer or via the Web Interface) to an **unlimited** number of users, including the default admin user, and, if configured in the system, any anonymous user. See also the KnowledgeTree Editions [Comparison Matrix](#).
- **KnowledgeTree Open Source** allows access to an unlimited number of enabled users, but does not provide access to the extended functionality in the KnowledgeTree Commercial Editions - SMB and Enterprise.
- A default admin user is created during the installation, and should be reset immediately after the installation is complete. The administrator can configure the system to allow or disallow anonymous users, and defines permissions that protects content in the repository from unauthorized viewing.

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

Restrictions on Customizing the Dashboard

It is currently not possible to customize the layout of the Dashboard. This is because the KnowledgeTree Commercial Editions source code has been Zend compiled in order to allow us to provide support.

7.1.1 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.*

7.2 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.

Figure: The Folder View in Browse Documents - also showing the Folder Actions menu

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

Administrative users have access to the following functionality in Browse Documents:

- work with documents and folders
- Define permissions
- elect to work in Administrator mode (in special circumstances, where you need free access to all functions and content in the DMS)
- search
- browse filtered content in the repository (by folder, by document type, or by lookup value)
- create and manage subscriptions

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

7.2.1 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**.

Note: When modifying folder permissions, a system message informs you that the permissions on the currently selected folder have been updated.

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
Role: Editor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Role: User	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group: Developers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Group: Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Group: Office Administration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group: Project Managers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group: System Administrators	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Group: The Board	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Figure: Editing view of the Folder permissions page

7.2.2 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.

Prerequisite:

- You must have [created Roles](#) in the **Security Management** section of **DMS Administration** to make Roles available for allocation in Browse Documents.

Perform the following steps:

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

Allocate Roles for "Acme Corporation"




In many cases, workflow actions will be assigned to certain **roles** (e.g. Manager, Interviewer, Researcher, Journalist). You can assign these roles to specific groups in particular areas of the document management system.

Warning: Please note that changing role allocations may take a some time, depending on the number of folders below this one.

Role	Allocated users	Edit Users	Edit Groups	Use Parent
Author	inherited from parent folder. Users: no users Groups: no groups	Override Parent Allocation		
editor	inherited from parent folder. Users: no users Groups: no groups	Override Parent Allocation		
administrator	inherited from parent folder. Users: no users Groups: no groups	Override Parent Allocation		
manager	inherited from parent folder. Users: no users Groups: no groups	Override Parent Allocation		
publisher	inherited from parent folder. Users: no users	Override Parent Allocation		



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 - i.e. the **Edit** icon displays in the **Edit Users** column, and in the **Edit Groups** column.
- 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.
- add users allocated to this role?** Click  in the **Edit Users** column for the role to open the **Allocate User to Role** page; then, select one or more users in the **Available Users** field. Click the right pointing arrow to populate the **Member users** field. Click **save changes** when you're done.
- remove users allocated to this role?** Click  in the **Edit Users** column for the role to open the **Allocate User to Role** page; then, select one or more users in the **Member users** field. Click the left pointing arrow to move the names to the **Available Users** field. Click **save changes** when you're done.

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

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

- **add groups allocated to this role?** Click  in the **Edit Groups** column for the role to open the **Allocate Groups to Role** page. Select one or more groups in the **Available Groups** field; then, click the right pointing arrow to populate the **Member groups** field. Click **save changes** when you're done.
- **remove groups allocated to this role?** Click  in the **Edit Groups** column for the role to open the **Allocate Groups to Role** page. Select one or more groups in the **Member groups** field; then, click the left pointing arrow to move the names to the **Available Groups** field. Click **save changes** when you're done.

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

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

7.2.3 Import from Server Location

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

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

Perform the following steps:

1. Use your administrator login details to open **Browse Documents**.
2. Click **Import from Server Location** in the **Folder Actions** menu to open the **Import files into [folder]** page.
3. Specify the path to the content you want to import.
4. Specify the document type of the content to import from the server location you defined.
5. Click the down arrow for the **Document Type** pick list; then, select an option.
6. Complete the fields for the custom fieldsets defined for this document type - e.g. author, category, keywords etc.

Note: Your administrator defines custom fieldsets and fields for document types.

7. Click **Add** to upload the document.

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

7.2.4 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: Activate Bulk Export by enabling the plugin in the **Miscellaneous** section of **DMS Administration**. See [Manage Plugins](#) for more information.

Perform the following steps:

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

7.2.4.1 Working with Folders

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

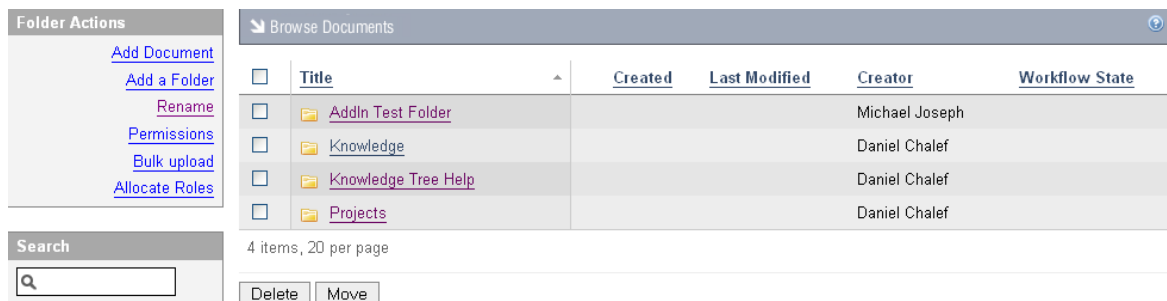


Figure: Folder Actions Menu

7.2.5 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.

Note: Activate the Bulk Upload feature by enabling the plugin in the **Miscellaneous** section of **DMS Administration**. See [Manage Plugins](#) for more information.

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

7.2.6 Working with Documents

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

Note: You must reread / enable the plugins list after upgrading or installing KnowledgeTree. This ensures that all the available functionality is activated for your KnowledgeTree installation. See [Manage Plugins](#) for more information.

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

The screenshot displays the KnowledgeTree interface. On the left, the 'Document Actions' menu is open, showing options such as 'Display Details', 'Download', 'Checkout', 'Edit metadata', 'Delete', 'Move', 'Rename', 'Transaction History', 'Version History', 'Archive', 'Workflow', 'Permissions', 'Discussion', 'Email', and 'Links'. The 'Display Details' option is highlighted. Below the menu is a search box with a 'search' button and a link to 'Advanced Search'. At the bottom left, there is a 'Browse Documents By' section. The main content area shows the 'Document Detail' page for 'Project Library'. It includes a 'Generic Information' section with details like 'Document Filename' (Project Library.doc, 20Kb), 'File is a' (Word Document), 'Created by' (Carolyn Duangprom), 'Last update by' (Carolyn Duangprom), 'Document Type' (ISO 9001 System Audit Checklist), 'Workflow status' (In Review), 'Document ID' (1899), and 'Category' (General).

Figure: The Document Actions Menu - Display Details open

7.3 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](#)

Additional Functionality available in KnowledgeTree Commercial Editions - SMB and Enterprise

- [KTIS Administration](#)
Note: When upgrading your KnowledgeTree installation to the KnowledgeTree Commercial Editions, you need to reread the plugins from the file system to view the KTIS section of DMS Administration.
- [Reporting](#)

7.3.1 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](#)

The screenshot displays the KnowledgeTree DMS Administration interface. At the top, there is a header with a placeholder for a company logo and the KnowledgeTree logo. Below the header is a navigation bar with tabs for 'Dashboard', 'Browse Documents', and 'DMS Administration'. The 'DMS Administration' tab is active, and the sub-menu includes 'Administrator', 'Preferences', and 'Logout'. The main content area shows the breadcrumb 'you are here: administration > users and groups'. On the left, there is a sidebar menu with options: 'Administration', 'Users and Groups', 'Security Management', 'Document Storage', 'Document Metadata and Workflow Configuration', 'Miscellaneous', 'KTIS Administration', and 'Reporting'. The main content area is titled 'System Administration' and 'Users and Groups'. It contains three sections: 'Authentication' (describing default user and group control and authentication sources), 'Manage Users' (with a sub-link 'Add or remove users from the system'), 'Manage Groups' (with a sub-link 'Add or remove groups from the system'), and 'Control Units' (with a sub-link 'Specify which organisational units are available within the repository'). At the bottom, there is a footer with copyright information: '© 2006 The Jam Warehouse Software (Pty) Ltd. All Rights Reserved — KnowledgeTree Version: Professional 1.1 — Request created in 0.626s'.

Figure: Users and Groups section in DMS Administration

7.3.1.1 Important: KnowledgeTree Commercial Edition Subscription Management

KnowledgeTree only allows enabled users to access the DMS. Users are enabled by default when you first add them to the system.

KnowledgeTree SMB Edition license holders manage their user base (limited to 20 named, active users - i.e. 'enabled' users) by enabling and disabling users in **Users and Groups**. When disabling a user that no longer requires access to the system, you free up that user slot to allow access to another user - limited to the **20** user maximum for your KnowledgeTree SMB Edition subscription.

User Management

Add new users

To add users to the DMS authentication provider, you need to provide them with credentials through this section. If you are using an external source of login information like **LDAP**, ensure the appropriate plugin is loaded and use the section below.

[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**.

Name	Username	Edit	Enabled	Enable	Disable	Group Memberships	Current Groups
Administrator	admin			—	—	Manage Groups	System Administrators
Jennifer Bennet	JBennet			—	<input type="checkbox"/>	Manage Groups	Managers

Figure: View all users to see enabled users - enable or disable users to manage user access to the DMS for all KnowledgeTree editions

KnowledgeTree Enterprise Edition and **KnowledgeTree Open Source Edition** allow access to the DMS to an unlimited number of enabled users.

The number of user-slots available (maximum 20 for SMB subscription) is determined by the key with the soonest expiry date. For example, if you have one SMB subscription that is due to expire in 7 days, and you have another SMB subscription expiring in one year; you will only be allowed to allocate free slots (currently disabled user slots) based on the number of users enabled for the subscription expiring in 7

days.

A new subscription is only activated after the older subscription has expired. This allows you to add a new key on your system before the older key expires.

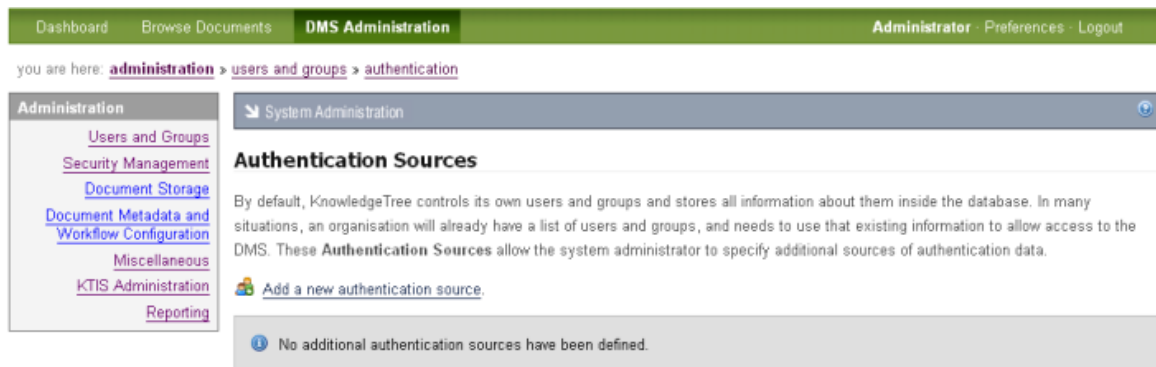
When a user who has not been enabled in the system logs in, a system message advises that their account has been disabled, and they will need to contact the system administrator to enable their user account before they will be allowed to access the repository.

7.3.1.2 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**.

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



7.3.1.2.1 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.
2. Click the **Authentication** link to open the **Authentication Sources** page.

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 or delete an existing authentication source?** Go to [Editing / Deleting Authentication Sources](#).
- **edit authentication provider information?** 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.knowledgetree.com for developer information.

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.

7.3.1.2.2 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.

▾ System Administration

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.

7.3.1.3 Manage Users

You use the **Manage Users** section of **Users and Groups** to add users to 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.

Note: You cannot remove users from KnowledgeTree - users that are no longer active on the system can only be disabled.

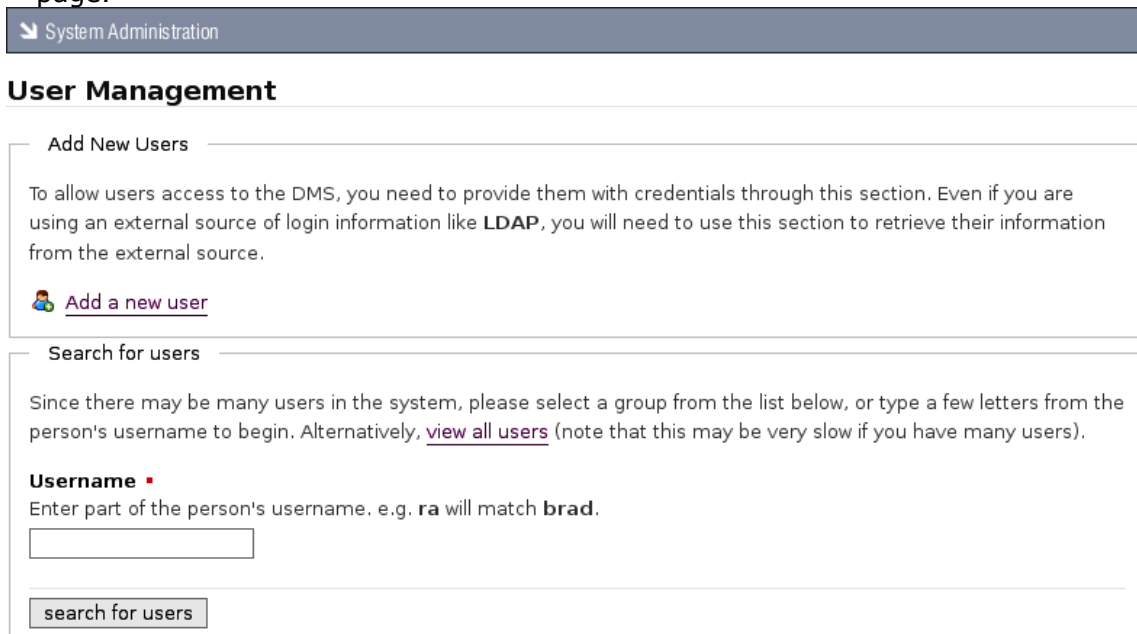
The system uses the information you specified when adding a user to retrieve their details from the authentication source. This allows you to verify the user's login credentials and permissions.

7.3.1.3.1 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**.

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.

7.3.1.3.2 Edit / Enable / Disable User Profile

This procedure changes 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	Enabled	Enable	Disable	Group Memberships	Current Groups
Administrator	admin			—	—	Manage Groups	System Administrators
Bryn Knuttel	bknuttel			—	<input type="checkbox"/>	Manage Groups	User is currently not a member of any groups.
Carolyn Anderson	carolyn			—	<input type="checkbox"/>	Manage Groups	User is currently not a member of any groups.
Jaime Rath	jaimie			—	<input type="checkbox"/>	Manage Groups	Management

Figure: Users and Groups - 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**.
- **disable a user?** Click in the **Disable** column for the relevant user; then, click **Apply Changes**.
Note: New users are enabled by default. You need to disable a user to prevent that user from accessing the system.
- **enable a user?** Click in the **Enable** column for the relevant user; then, click **Apply Changes**.
Note: New users are enabled by default. You will only need to enable a user that has been disabled.
- **change a user's group membership profile?** Click the **Manage Groups** link for the relevant user to open the **Change Groups** page. Populate the **Assigned Groups** list from the options in the **Available Groups** list to define this user's group membership; then, click **save changes**.

7.3.1.3.3 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 plugin 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

7.3.1.3.3.1 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.

System Administration

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 plugin; 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.

7.3.1.3.3.2 Adding a User from an External Authentication Source

This procedure adds 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 plugin 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 plugin; 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**.

7.3.1.4 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*

7.3.1.4.1 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.

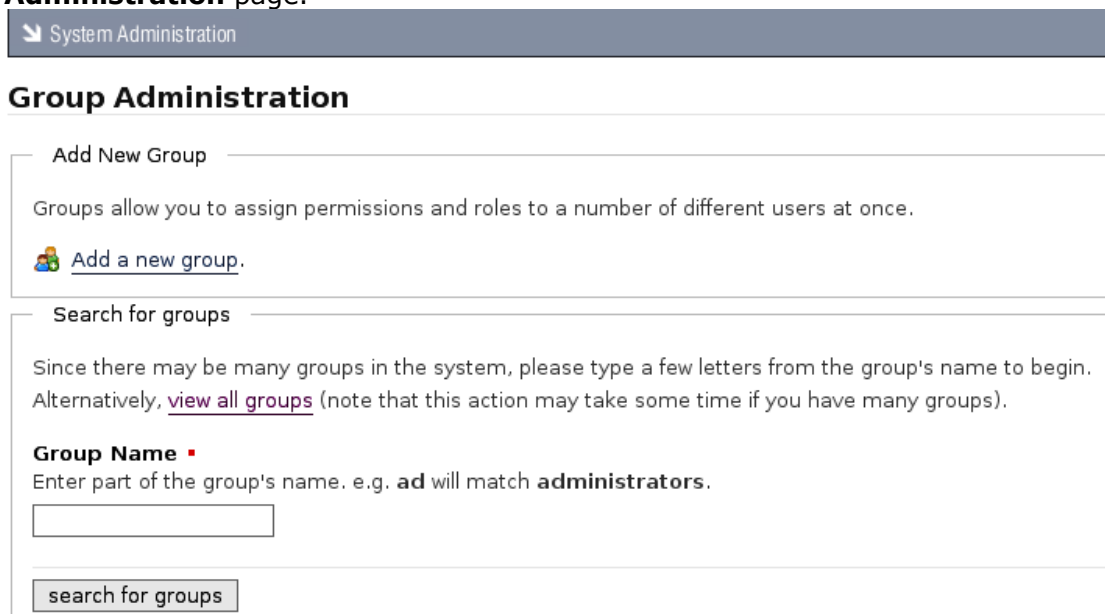


Figure: The User Management Page

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

7.3.1.4.2 Adding New Groups

This procedure creates a new group.

Creating a new group involves:

- naming the group
- assigning administrative privileges to group members (if required)

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.
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?

No Unit

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.

7.3.1.4.3 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**

7.3.1.5 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.

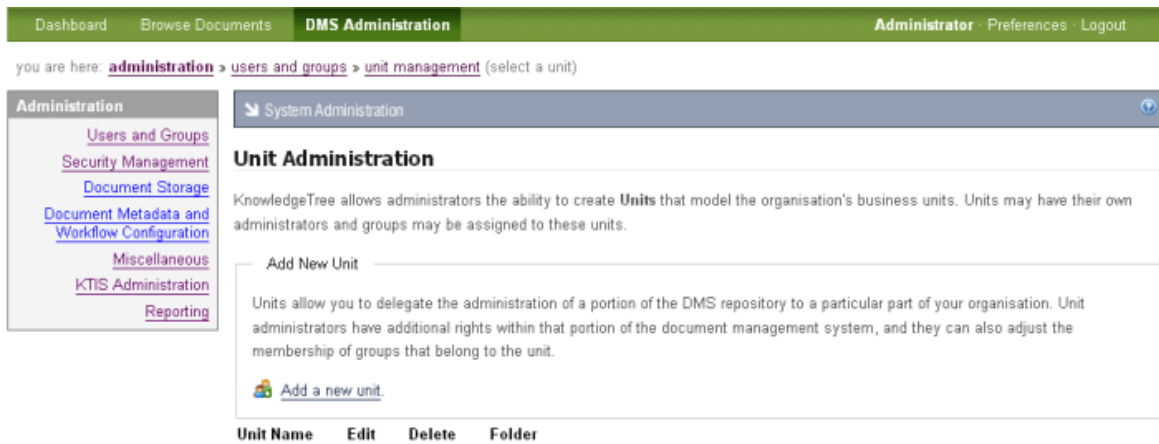


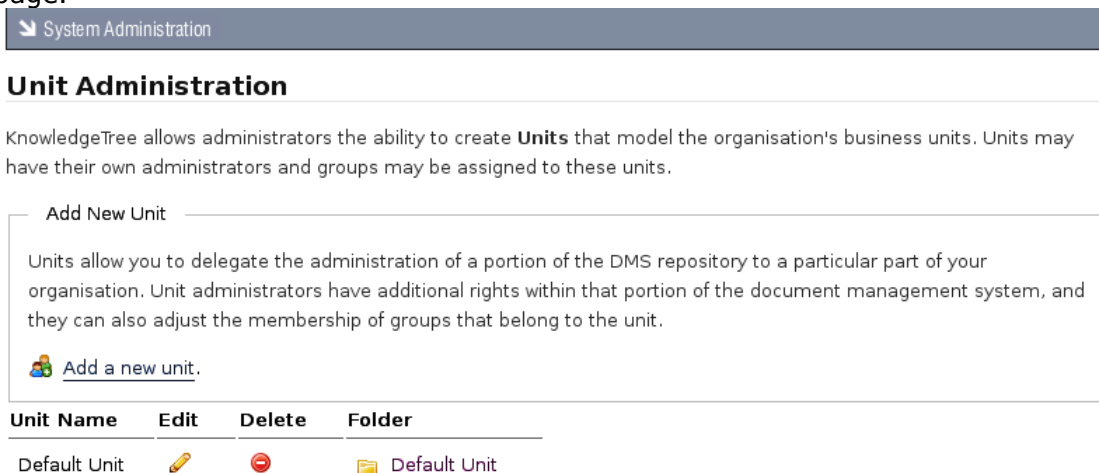
Figure: Unit Administration page in DMS Administration

7.3.1.5.1 Adding 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.



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

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**.

Next Cancel

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.

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

create unit Cancel



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.

7.3.1.5.2 Viewing / Editing / Deleting Units

This procedure allows you to view existing units, or to change or remove 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.

7.3.2 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

Home » [security management](#)

System Administration

Security Management

[Permissions](#)

Create or delete permissions.

[Roles](#)

Create or delete roles

[Dynamic Conditions](#)

Manage criteria which determine whether a user is permitted to perform a system action.

Figure: Security Management Page in DMS Administration

7.3.2.1 Permissions

KnowledgeTree™ provides several inbuilt [permissions](#) - **Read, Write, Add Folder, Manage Permissions, Delete**. You can also create your own permissions; for example, to control user and group access for plugins, or define the permissions to use as **Guard Permissions** for workflow transitions.

Note: Any user who wants to perform a transition in a workflow must have the guard permission.

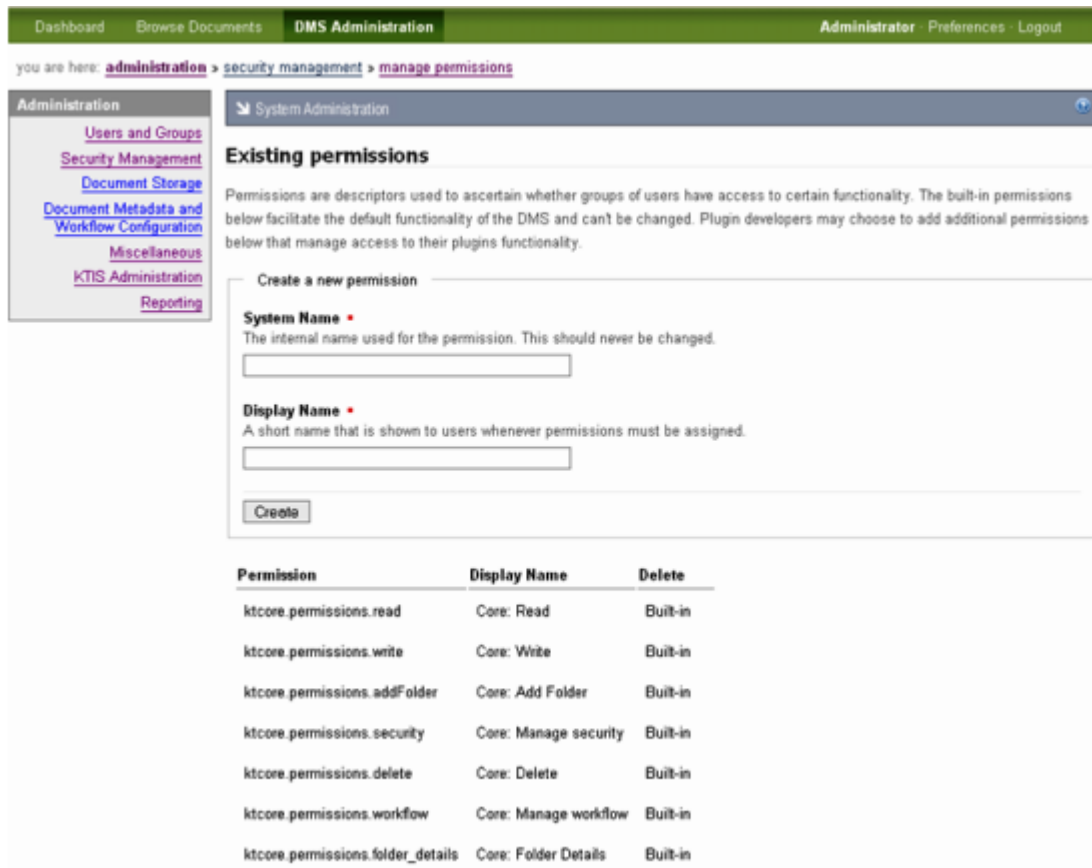


Figure: KnowledgeTree provides built-in permissions

7.3.2.1.1 View / Delete Existing / Add New Permissions


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

Perform the following steps:

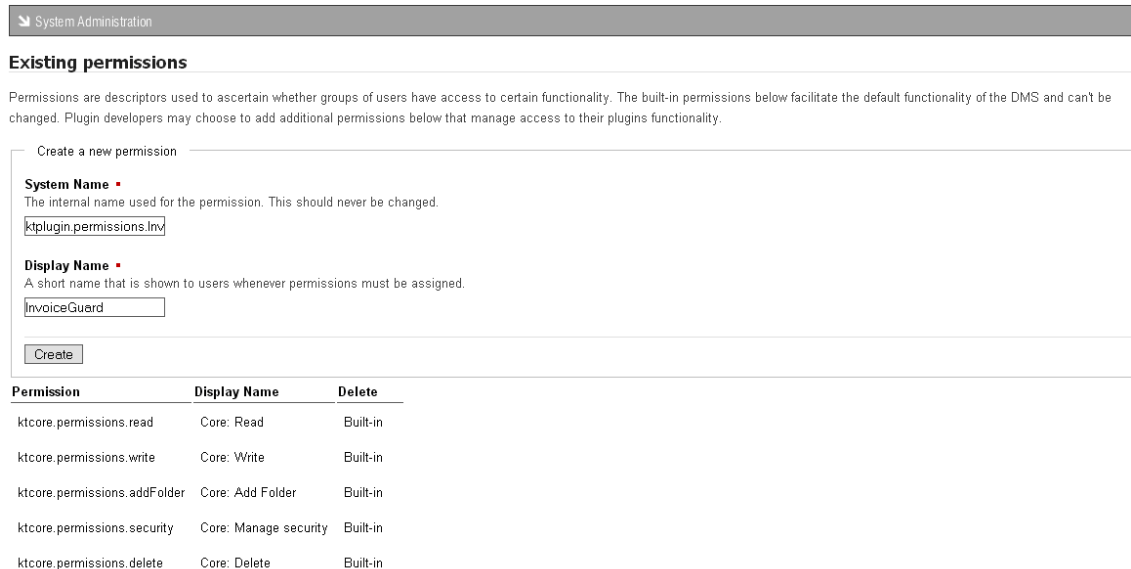
1. Use your administrator login credentials to open **DMS Administration**.
2. Click **Security Management** in the **Administration** menu to open the **Security Management** page.
3. Click **Permissions** to open the **Existing permissions** page.
4. **Do you want to...**
 - **view existing permissions?** 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

7.3.2.2 Roles

An example of a **Role** in KnowledgeTree™ may include document creator, reviewer, publisher, writer, editor, secretary, developer, manager, or secretary, and so on.

Workflow actions - e.g. *review*, or *publish* - are typically assigned to a specific role. 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.

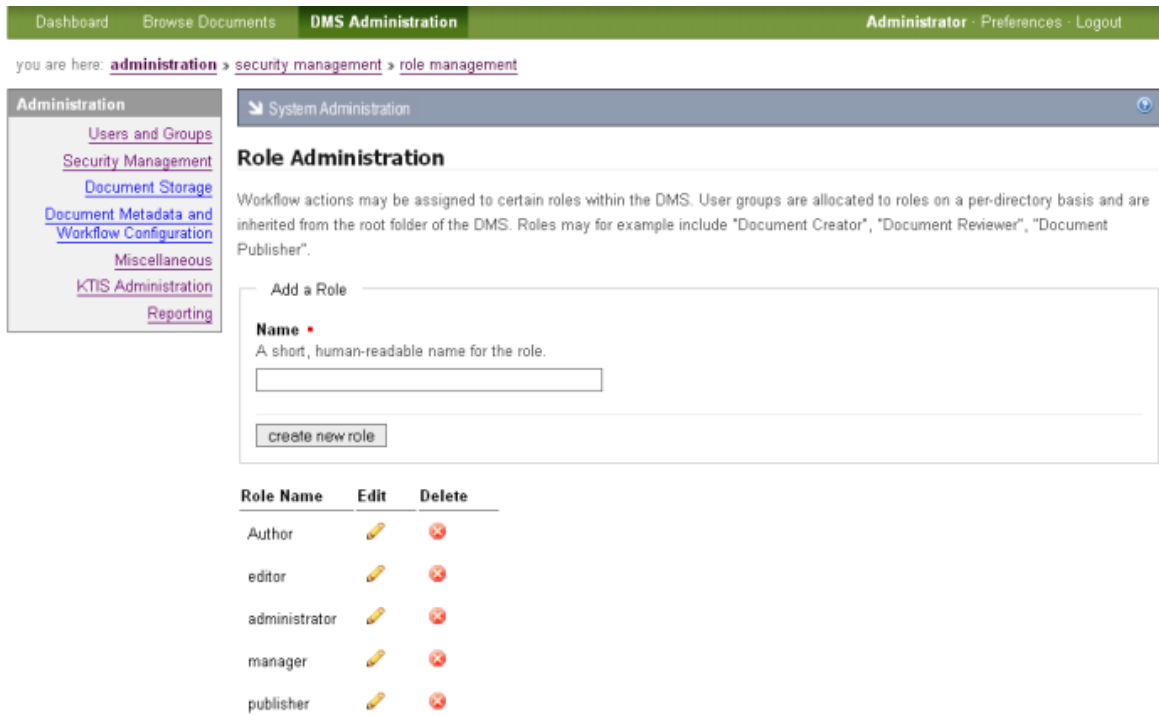


Figure: View / edit / delete existing roles, or Add a new role

7.3.2.2.1 Viewing / Adding / Editing / Deleting Roles

This procedure allows you to create new roles, or to view, edit, or delete existing roles that have been set up 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 **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 (i.e change role name)?** Click in the **Edit** column for the role to open the editing page. Change the name of the role; 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.

7.3.2.3 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.

7.3.2.3.1 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.

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="PRIM"/>	<input type="button" value="Remove"/>
<input type="text" value="Name"/>	<input type="button" value="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.

7.3.2.3.1.1 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

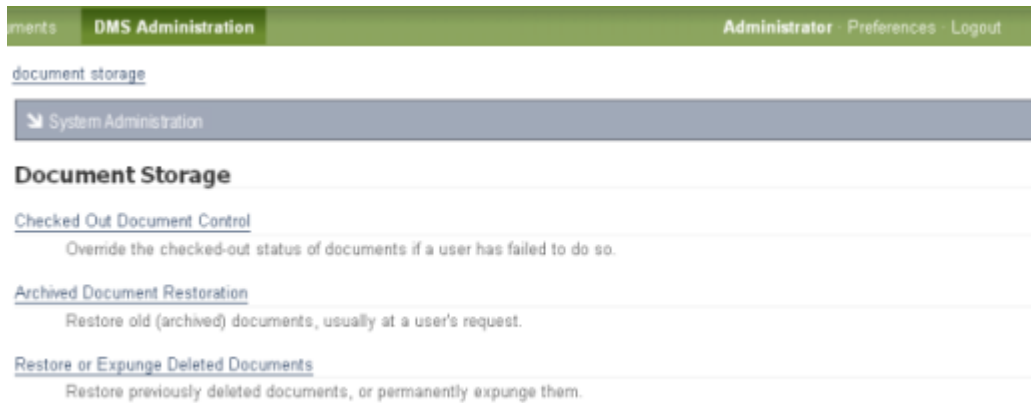


Figure: Document Storage page in DMS Administration

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:

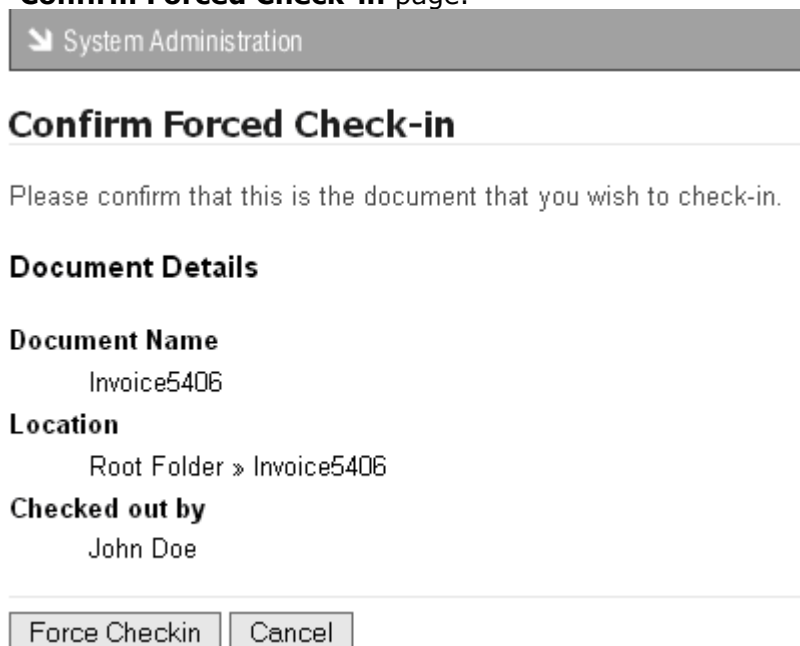
- the local copy of the checked-out document has been lost;
- the user who did the check-out is not currently available to check it back in.

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.



System Administration

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.

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.

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).

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


Expunge Restore

Figure 5: Restore or Expunge Deleted Documents

7.3.2.3.2 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"/>

Dynamic permissions

Remove	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 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"/>

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"/>

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"/>

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.

7.3.3 Document Metadata and Workflow Configuration

Adding **metadata** to documents improves the efficiency of sorting and managing documents in the repository.

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

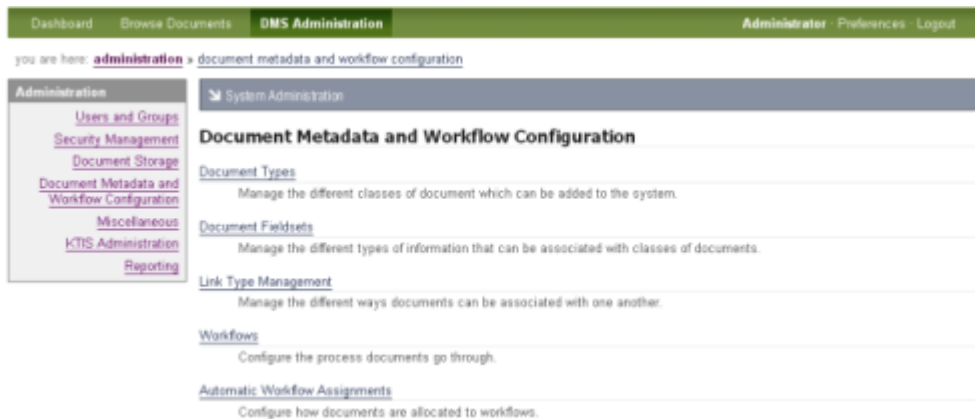


Figure: Document Metadata and Workflow Configuration page in DMS Administration

7.3.3.1 Document Types

KnowledgeTree allows you to group documents that have a similar function, by 'type'. You can further define these document types you create by associating custom fieldsets with specific document types - this ensures that various document types contain specific and relevant information.

For example, 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**.

You can configure Document Types and Associated fieldsets in two ways:

<p>Create the document type, then create custom fieldsets</p>	<p>Create the document type in the Document Types section, then create one or more custom fieldsets in the Document Fieldsets section.</p> <p>Note: The collection of fieldsets you define are automatically listed in the Document Type editing page.</p> <p>Edit the document type to add (associate) the fieldset(s) you want to use in this document type.</p>
<p>Create custom fieldsets, then create the document type</p>	<p>Create a set of custom fieldsets in Document Fieldsets; then, create the document type.</p> <p>On the Document Type editing page, select the fieldsets out of the collection you pre-defined in Document Fieldsets.</p>

Note: You cannot delete a document type in KnowledgeTree; you can only disable unused document types. This prevents you from deleting a document type that may be associated with a large number of documents, and thereby causing the loss of required metadata.

7.3.3.1.1 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 to define the information that should be included in documents of a specific type - i.e. name, invoice number, amount, address, publish date etc. See the [introduction to Document Types](#) for more information about the relationship between document types and custom fieldsets.

Tasks you must complete before you are able to use a new document type:

- define custom fieldsets for the document type
- associate the custom fieldsets with the document type
- enable the document type to make it a selectable option when adding documents to the DMS

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.

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

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 use the enable/disable buttons to change its availability state.

Document Type	Associated Fieldsets	Edit	Disable/Enable
Administrative Email	—		
Default	—		
Issue Tracker Emails	—		
Personal Email	—		
Project Ace Email	—		

3. Define a name for the new document type in the **Name** field; then, click **Create** to open the **Document Types** editing page.

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.** 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.

The screenshot shows the 'Document Types' editing page for a document type named 'Invoice'. At the top, there is a navigation breadcrumb 'System Administration' and a system message 'Document type created'. Below this, the document type name 'Invoice' is displayed in a text box with a 'Change' button next to it. The main section is titled 'Type-specific field sets' and contains a message: 'No fieldsets are currently associated with this type.' Below the message is a section titled 'Associate Fieldsets' which includes a sub-section 'Available Fieldsets' with the instruction 'Select the fieldsets which you wish to associate with this document type'. A list box shows two fieldsets: 'Invoice information' and 'Receipt information'. At the bottom of the 'Associate Fieldsets' section is a button labeled 'Associate Fieldsets'.

Figure: Document Types editing page displays available custom fieldsets

- **No.** 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

7.3.3.1.2 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](#).

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

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.

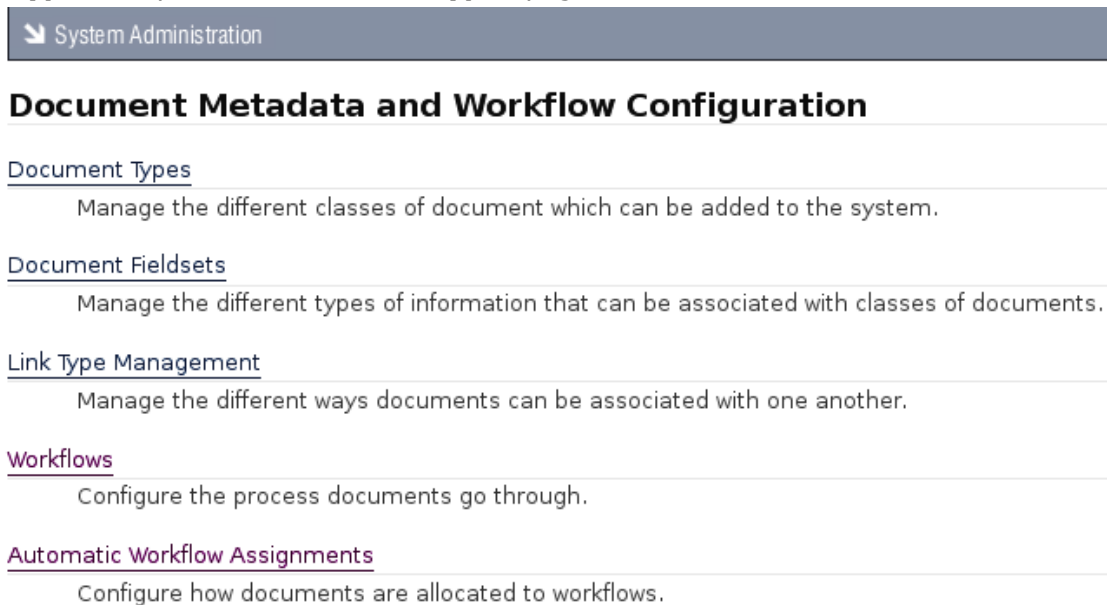


Figure: The Document Metadata and Workflow Configuration section of DMS Administration

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.

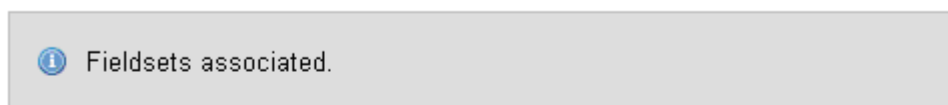
Note: A system message informs you that the fieldsets you selected are no longer associated with this document type.

- **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

7.3.3.1.4 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.

7.3.3.2 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. Plugins use this namespace to call the fieldset, and to control how the fieldset works. For more information on developing Plugins for KnowledgeTree, see the KnowledgeTree Wiki at <http://support.knowledgetree.com/confluence/>

7.3.3.2.1 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 control: 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

7.3.3.2.2 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

7.3.3.2.2.1 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. Select a type of field from the **Type** pick list - either **Normal**, **Lookup**, or **Tree**.
7. 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.

7.3.3.2.2.2 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.

7.3.3.2.2.3 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, etc. This page will allow you to arrange the lookups in the field in a hierarchy. All changes are immediately stored, and you can see the results in the field.

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, Europe, Asia, The Americas) — followed by subcategories that contain actual countries — e.g. Vietnam, South Africa, 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

7.3.3.3 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'.

7.3.3.3.1 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 those 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
duplicate by	Document is a duplicate		

Figure: Creating a Document Link Type

7.3.3.3.2 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		

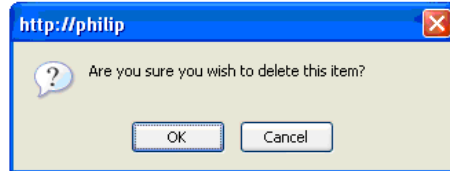



Figure: Removing a Document Link Type

7.3.3.3.3 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 be composed of an arbitrary number of values from an external datasource, toggling the **Sticky** attribute of a value

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

Field properties

Name Invoice Source

Description Where is the invoice from?

Type Tree

Change

Lookup Values

Add new values

External Add

[Manage lookup tree](#)

Existing values

- Internal

Disable Toggle stickiness 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.

7.3.3.4 Workflows

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

A workflow comprises states and transitions. A state is a predefined position in the document lifecycle (or workflow) that mark the path towards completing the lifecycle of the document. Transitions are actions that move a document from one state to

another in the workflow.

Example

Each state is reached via a transition ...

- **Starting state** - invoice created
transition: send to client
- **new State:** Distributed
transition: Await payment
- **new State:** Paid

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.

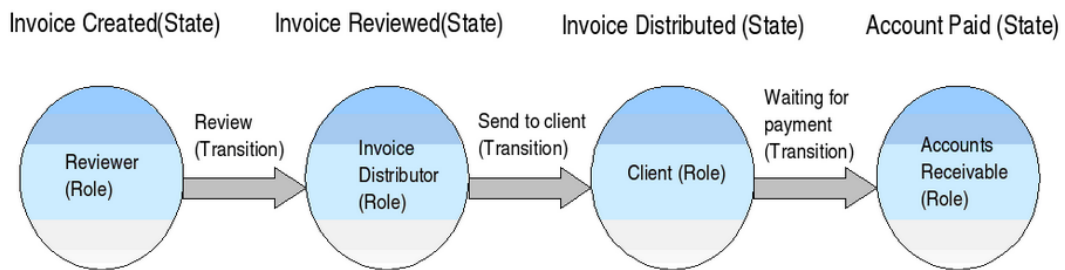


Figure: A typical document workflow

Workflows in KnowledgeTree involve three key areas:

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

System Administration

Workflows

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

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
Sales Lead Process Qualification	Enabled	 Disable
Work Order Quality Process	Disabled	
ISO 9000 Work Order	Disabled	
Hiring Process	Disabled	
Billing	Enabled	 Disable

Figure: Workflows - main page (existing workflows displayed)

7.3.3.4.1 View Existing / Add New Workflow

This procedure allows you to view existing workflows, and to create new workflows.

Adding a new workflow involves the following tasks:

1. [Create the workflow](#)
2. [Create states](#)
3. [Create transitions](#)
4. Link states to transitions
5. Assign a starting state to the workflow to enable the workflow.

Perform the following steps:

1. Use your administrator login credentials to open the **Document Metadata and Workflow Configuration** section in **DMS Administration**.
2. Click **Workflows** to open the **Workflows** page.

System Administration

Workflows

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

Create a new workflow

Name *
A human-readable name for the workflow.

Existing workflows

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

Name	Status	Edit
Sales Lead Process Qualification	Enabled	Disable
Work Order Quality Process	Disabled	
ISO 9000 Work Order	Disabled	
Hiring Process	Disabled	
Billing	Enabled	Disable

3. Do you want to:

- **view existing workflows?** Scroll down the page to **Existing workflows**.
- **edit an existing workflow?** Scroll down the page to view existing workflows; then, click this in the **Edit** column for the workflow you want to modify. See [Edit Existing Workflow](#) for more information.
- **add a new workflow?** Define a name for the new workflow in the **Name** field; then, click **Create** to open the **Workflow Overview** page for the new workflow. Go to step 4.

4. Are there states defined for this workflow?

- **Yes.** Go to step 5.
- **No.** You need to define states for the workflow. See [Creating States](#) for step-by-step instruction; then, when you're done, go to step 5.

5. Select a predefined state from the **Starting State** pick list; then, click **Update workflow properties**.


7.3.3.4.2 Enabling a Workflow

By default, newly created workflows are **disabled**. You need to set an initial (starting) **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 credentials to open the **Document Metadata and**

Workflow Configuration section in **DMS Administration**; then, click **Workflows**.

2. Scroll down the page to view existing workflows. Locate the workflow you want to enable; then, click  in that workflow's **Edit** column to open the **Workflow Overview** page.
3. Select a predefined state in the **Starting State** pick list; then, click **Update workflow properties** to enable the workflow.

7.3.3.4.3 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. Administrative users can configure the system to automatically assign workflows to new documents, or the assign workflows only to specified documents.

Users are allowed to select and assign workflows to the documents they're working with, provided they have permissions to do so.

You must assign a **starting state** to a workflow to enable it.

7.3.3.4.4 Edit Existing Workflow

Editing a workflow involves one or more of the following tasks:

- adding / editing / removing states
- adding / editing / removing transitions
- adding / editing / removing actions

Workflow Overview: Sales Lead Process Qualification

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: [credit check](#) | ✖ [Delete](#)

Notified groups & roles: No users to be notified.
Controlled Actions available: All 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: Edit Workflow page

7.3.3.4.5 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 define how documents move from state to state in the workflow. Each state can have one or more transitions, depending on the workflow topography.


7.3.3.4.5.1 Creating States

This procedure defines states for a workflow.

Note: Only an administrative user is allowed to create states.

You need to create states to assign to workflows. Workflows are only enabled once they have been assigned a starting 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** to open the **Workflows** page.
3. Scroll down the page to view **Existing workflows**; then, click  in the **Edit** column for the workflow where you need to assign a state.
4. Click **States** in the **Workflow** menu at the top left of the page to open **Manage**


States.

5. Click **Create a new state** to open the **New State** page.
6. Define a name in the **Name** field; then, click **Create State**.
7. In the **Inform which Users** section, select the roles and groups to notify when the workflow reaches this state; then, click **Update users to inform**.
Note: *You need to have predefined groups and roles for your KnowledgeTree installation.*
8. In the **Transitions** section of the page, define the transitions leading to and/or from this state.
Note: *If there are no transitions defined for this state, you need to [create transitions](#).*
9. In the **Controlled Permissions** section of the **State** page, select the permissions you want to control with this state; then, click **set controlled permissions**. Now allocate permissions by role and/or group in the **Role or Group** section; then, click **Update Allocated Permissions**.
8. Click **Save** to save your changes for this state.

7.3.3.4.5.2 Disable / Delete / Edit Existing State

This procedure disables, edits, or removes an existing workflow state.

Perform the following steps:

1. Use your administrator login credentials to open the **Document Metadata and Workflow Configuration** section in DMS Administration; then, click **Workflows** to open the **Workflows** page.
2. Scroll down to the bottom of the page to view existing workflows.
3. **Do you want to:**
 - **disable a state?** Click the **Disable** link to disable the workflow state you identified.
Note: *You must assign a starting state to re-enable this state.*
 - **edit a state?** Click  in the **Edit** column for the state to open its **Workflow Overview** page.
 - **permanently remove the state?** Click the **Delete** link for the state you're removing.
Note: *A system message confirms that the state has been deleted.*

System Administration

State deleted.

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.

Create a new state

A critical part of workflow is the creation of various different states for documents.

[Create a new state](#)

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

7.3.3.4.5.3 Creating Transitions


This procedure creates a **workflow transition**.

You need to set the following options when defining Transitions:

- **Destination state** - indicate whether or not the transition sets the workflow to its destination state - i.e. workflow complete
- **Guard Permission** - users who are required to perform any transition must have at least guard permission
- **Guard Group** - users who run the transition must be part of this group
- **Guard Role** - users who run the transition must be assigned to this role

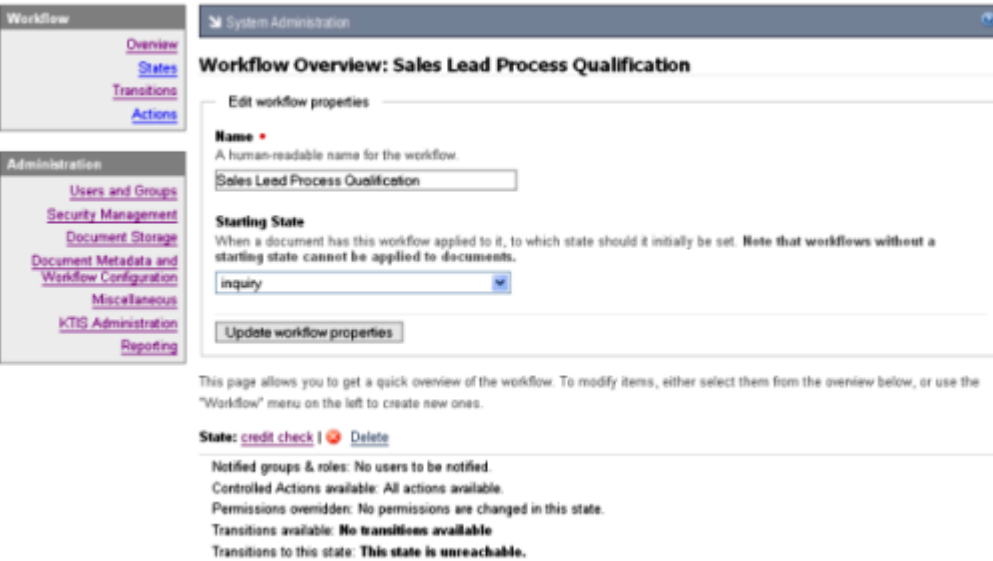
Note: Source State defines the states from which a user may perform a transition. A single transition can be performed from many different states.

Perform the following steps:

1. Use your administrator login credentials to open the **Document Metadata and Workflow Configuration** section in **DMS Administration**; then, click **Workflows** to open the **Workflows** page.
2. Scroll down the page to view existing workflows; then, click  in the **Edit** column for the workflow you want to modify, to open the **Workflow Overview** page.

3. Click **Transitions** in the **Workflow** menu to open the **Manage Transitions** page.

you are here: [administration](#) > [document metadata and workflow configuration](#) > [workflows](#) > [sales lead process qualification](#)



Workflow Overview: Sales Lead Process Qualification

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: [credit check](#) | [Delete](#)

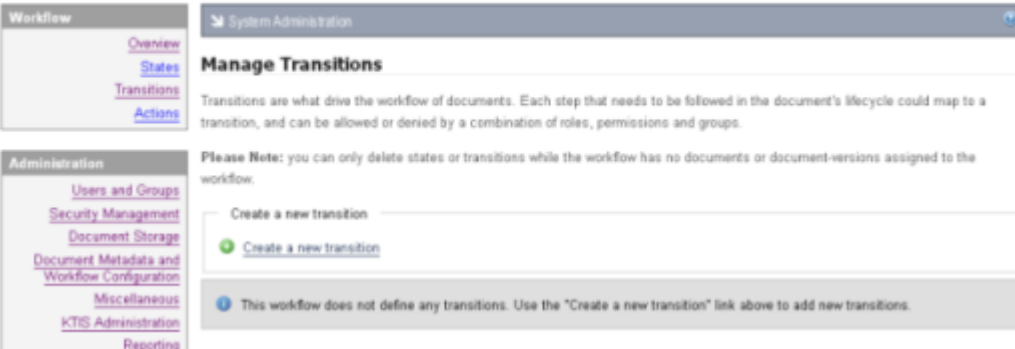
Notified groups & roles: No users to be notified.
Controlled Actions available: All actions available.
Permissions override: No permissions are changed in this state.
Transitions available: **No transitions available**
Transitions to this state: **This state is unreachable.**

Figure: Click Transitions in the Workflow menu

4. Click **Create a new transition.**

Dashboard Browse Documents **DMS Administration** Administrator Preferences Logout

you are here: [administration](#) > [document metadata and workflow configuration](#) > [workflows](#) > [sales lead process qualification](#)



Manage Transitions

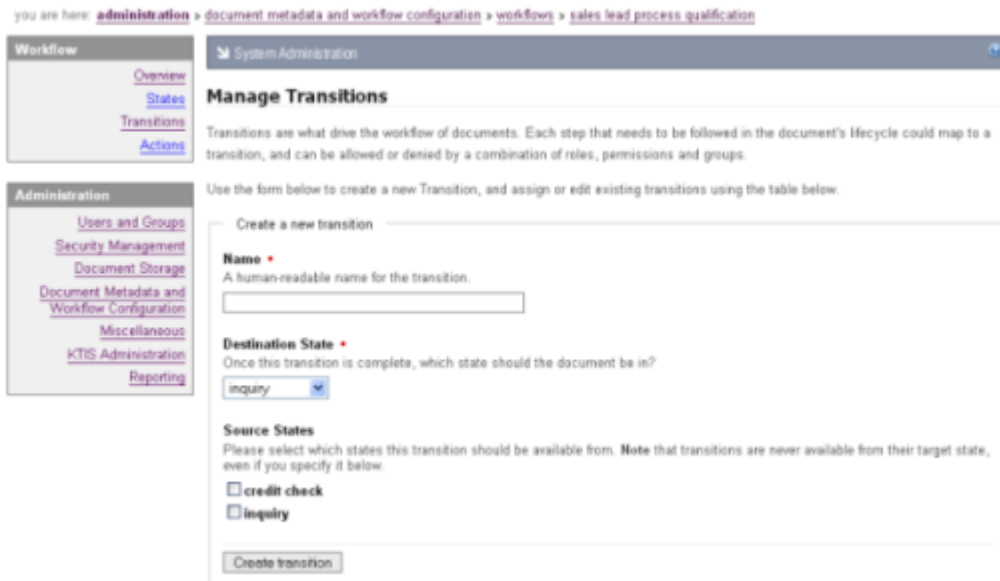
Transitions are what drive the workflow of documents. Each step that needs to be followed in the document's lifecycle could map to a transition, and can be allowed or denied by a combination of roles, permissions and groups.

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

i This workflow does not define any transitions. Use the "Create a new transition" link above to add new transitions.

5. Define a name for this transition in the **Name** field; then, select a **Destination State**.




6. Select the states this transition should be available from (in the Source States section) - one or more.

7. Click **Create transitions**.

7.3.3.4.5.4 View Existing Transitions

This procedure displays the transitions that exist for a specified workflow.


Perform the following steps:

1. Use your administrator login credentials to open the **Document Metadata and Workflow Configuration** section in **DMS Administration**; then, click **Workflows** to open the **Workflows** page.
2. Scroll down the page to view existing workflows; then, click  in the **Edit** column for the workflow to open the **Workflow Overview** page.
3. On the Workflow Overview Define a name for the transition in the **Name** field; then, select a **Destination State**.
4. Select the states this transition should be available from - one or more.
5. Click **Create transitions**.

7.3.3.4.5.5 View Existing States


This procedure displays the states that exist for a specified workflow.

Perform the following steps:

1. Use your administrator login credentials to open the **Document Metadata and Workflow Configuration** section in **DMS Administration**; then, click **Workflows** to open the **Workflows** page.
2. Scroll down the page to view existing workflows; then, click  in the **Edit** column for the workflow to open the **Workflow Overview** page.
3. Scroll down on the **Workflow Overview** page to view states that have been defined for this workflow.

7.3.3.4.5.6 Deleting 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**.

System Administration

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

7.3.3.5 Workflow Actions

7.3.3.5.1 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.

7.3.3.5.2 Defining Actions Controlled in a Workflow

This procedure defines the actions that users are allowed to perform on a document when it is in a specified state in a workflow.

Perform the following steps:

1. Use your administrator login credentials to open the **Document Metadata and Workflow Configuration** section; then, click **Workflows**.
2. Click  in the **Edit** column for the workflow to open the **Workflow Overview** page.
3. Click **Actions** in the **Workflow** menu.

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**.

System Administration

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

7.3.3.6 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.

7.3.3.6.1 Setting Workflow Allocation by Document Type

Perform the following steps:

1. Use your administrator login credentials to open **Document Metadata and Workflow Configuration** in **DMS Administration**.
2. Click **Automatic Workflow Assignments** to open the **Automatic Workflow Selection** page.
3. Select a **Workflow Plugin**.
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** type in 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

7.3.4 Miscellaneous

Use the **Miscellaneous** section of **DMS Administration** to perform the following administrative functions:

- [edit KnowledgeTree's onscreen help](#)
- [manage saved searches](#)
- [manage plugins](#)
- [view support and system information](#)
- [compare the database](#) with the content in the repository
- add or remove columns to [configure views](#)
- [customize disclaimer information](#) that displays on the interface
- generate [transaction reports](#) of activity in the DMS
- Define and arrange your system's Dashboard [quicklinks](#)

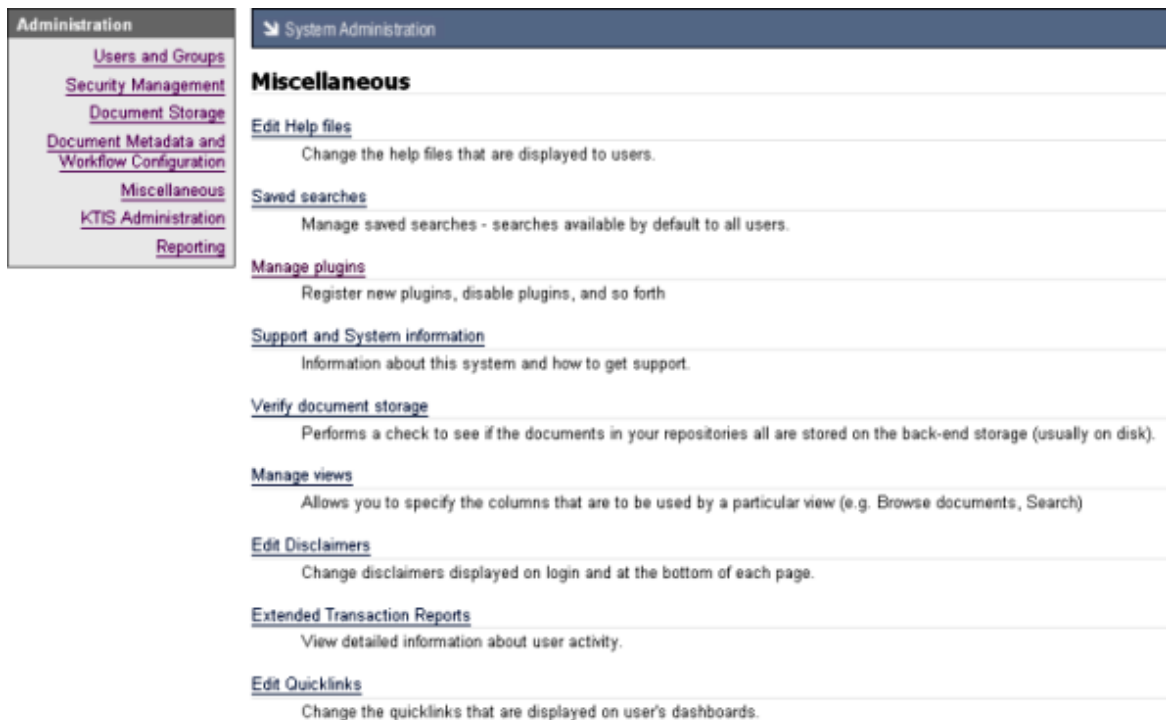



Figure: Miscellaneous Section of DMS Administration

7.3.4.1 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.

Customizing KnowledgeTree Help

KnowledgeTree allows you to customize the help for your organization.

Customized onscreen help files are 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

7.3.4.1.1 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](#).



7.3.4.1.2 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

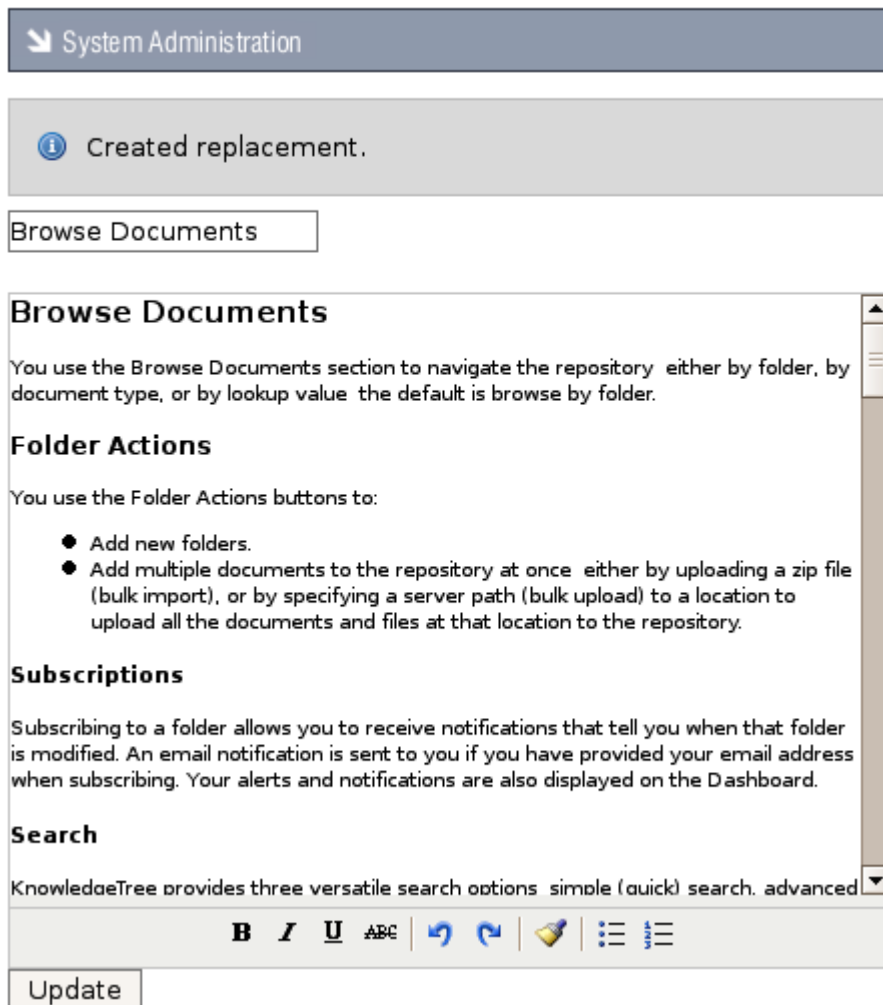


Figure: Creating a new customized help file

7.3.4.1.3 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.

7.3.4.1.4 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**.

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

7.3.4.2 Saved Searches

KnowledgeTree's **Saved Search** feature allows you to pre-save useful, advanced searches, in order to save time on commonly used searches.

7.3.4.2.1 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"/>	<input type="text" value="first select a type of query"/>	<input type="button" value="Add"/>

Figure: Creating the conditions for the saved search

7.3.4.2.2 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.

Saved searches

Saved searches are searches which are particular to your location. For example, you could define a search which returns all documents in a particular workflow state, or all documents which are considered "common" within your organisation (leave policy, newsletters, etc.) based on a category or fieldset value.


Create a new saved search

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](#).

7.3.4.3 Manage Plug-ins

Plugins allow you to add new features to your KnowledgeTree implementation.

Note: Click [here](#) to view a list of the plugins that have been developed by the KnowledgeTree community.

When upgrading or installing KnowledgeTree, you need to read or [reread the plugins](#) list from the file system to ensure that the latest functionality can be made available to your system users. Once the plugins list is complete on the page, you select the

plugins you want to [enable](#) for your upgraded installation.

Plugins are read and enabled on the **Plugins** page in the **Manage Plugins** section of **DMS Administration**.

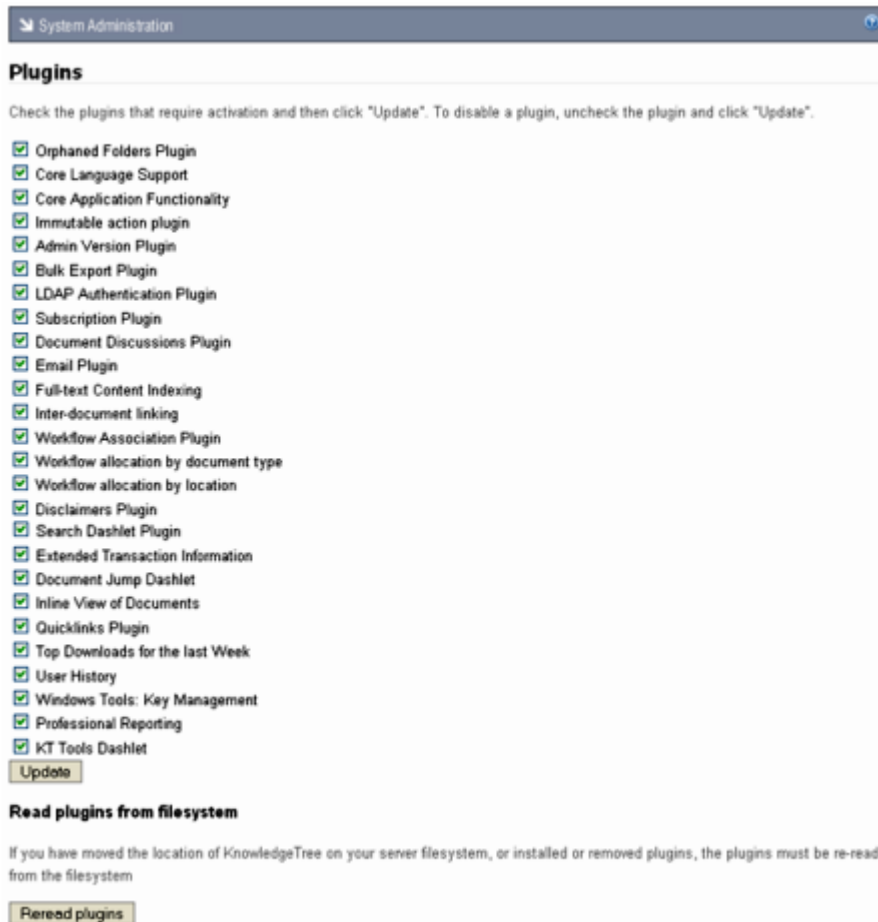


Figure: Reread plugins from the file system; then, enable required plugins and update your installation

7.3.4.3.1 Re-reading New Plug-ins

This procedure re-reads the KnowledgeTree™ plugin list in order to recognize a new plugin that has been copied into the KnowledgeTree plugin directory.

Once a new plugin file has been copied into the plugin directory, the system needs to re-read the plugin list in the directory to add the plugin to the list on the **Plugins** page in the **Miscellaneous** section of **DMS Administration**.

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 plugins** to open the **Plugins** page.
3. Click **Reread plugins** to add the new plugin to the plugins list.

4. Verify that the new plugin has been added to the list; then, click **Update**.

5. **Do you want to enable the new plugin now?**

- **Yes.** Go to [Enabling / Disabling Plugins](#).
- **No.** Exit this procedure. You can enable the plugin from the plugin list at a later stage.

7.3.4.3.2 Enabling / Disabling Plug-ins

This procedure enables or disables plugins that are on the plugin list in DMS Administration.

Note: You need to re-read the plugin directory in order to add new plugins to the plugin list.

Perform the following steps:

1. Use your administrator credentials to open the **Miscellaneous** section of **DMS Administration**; then, click **Manage plugins** to open the **Plugins** page.

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

- **enable one or more plugins on your plugin list?** Go to step 3.

Note: If the plugin that you want to enable is not on the plugin list, you will need to re-read the directory where you copied the plugin file. For more information on this task, go to [Re-reading New Plugins](#).

- **disable one or more plugins on your plugin list?** De-select the check box adjacent to each plugin 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 plugins have been updated. Disabled plugins remain on the list and can be enabled at any time, provided the plugin file is not removed from the plugin directory. If the plugin file is removed from the directory, the plugin will be removed from the list the next time you read from the directory.

3. Select the check box adjacent to each plugin 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 plugins have been updated.

7.3.4.4 Support and System Information

7.3.4.4.1 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.

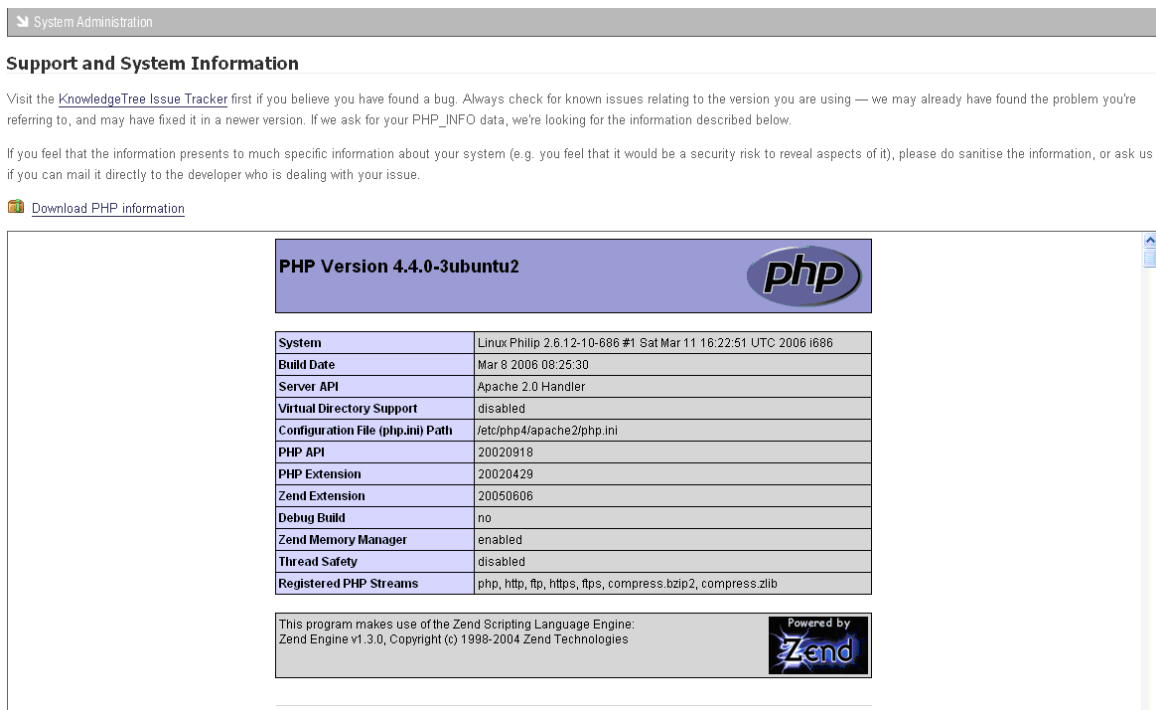
The **Support and System Information** page displays the output of a `php_info` command in a scrollable window. You may be asked to copy and send this information to the KnowledgeTree support staff if you require assistance with your issue.

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/PHP 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




Figure: Support and System Information page in Miscellaneous

7.3.4.5 Verify Document Storage

7.3.4.5.1 Verifying Database / Respository Consistency

Use the **Document Storage Verification** feature to ensure that the content of the repository is consistent with the database.

It is recommended that you perform this task after upgrading your installation.

Perform the following steps:

1. Use your administrator credentials to log in to KnowledgeTree's Web interface.
2. Navigate to the **Miscellaneous** page in **DMS Administration**.
3. Click **Verify Document Storage** to launch the verification process.
4. View verification results on the **Document Storage Verification** page.

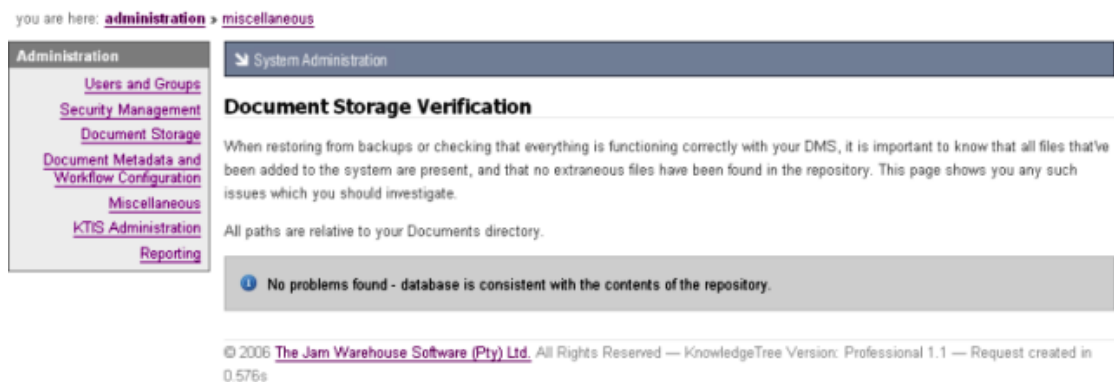


Figure: Checking the Repository

7.3.4.6 Manage Views

7.3.4.6.1 Add New / Delete Existing Columns

This procedure allows you to add or remove columns to customize views.

Perform the following steps:

1. Use your administrator details to login to the **Miscellaneous section** of **DMS Administration**.
2. Click **Manage Views** to open the **Select View** page; then, click on the view you want to modify, to open the **Edit View** page.

you are here: [administration](#) > [miscellaneous](#) > [manage views](#)

Administration

- Users and Groups
- Security Management
- Document Storage
- Document Metadata and Workflow Configuration
- Miscellaneous
- KTIS Administration
- Reporting

System Administration

Select View

Views are the selections of documents and folders you will find throughout KnowledgeTree. Some of those can be configured to use different kinds of columns (e.g. workflow state, the creator's name, etc.)


- [Browse Documents](#)
- [Search](#)

© 2006 The Jam Warehouse Software (Pty) Ltd. All Rights Reserved — KnowledgeTree Version: Professional 1.1 — Request created in 0.605s

3. Do you want to ...

- **add a column to the view?** On the **Edit View** page, select an option from the **Columns** pick list; then, click **Add Column to View**.

Note: Although you can add duplicate columns to a view, the system handles duplicate columns as though they are a single single column.

- **remove a column?** On the **Edit View** page, click the **Delete** icon -  - adjacent to the column you want to remove.






Note: A system message asks you to confirm the column delete action.

[miscellaneous](#) > [manage views](#) (browse documents)

System Administration

Edit View

The columns included in this view are displayed below. To add additional columns into the view, use the form below the list. To remove items, click on the "delete" icon next to the column name. Note that some columns may be required in a given view. Also, while you can have multiple copies of a given column in a specific view this is not recommended.

Column	Delete
Multiple Selection	—
Title	—
Download	
Created	
Modified	
Creator	
Workflow State	

Add a Column

Columns ▾

Select a column to add to the view. Please note that while you can add multiple copies of a column, they will all behave as a single column

7.3.4.7 Edit Disclaimers

7.3.4.7.1 Customizing Disclaimer Text

This procedure modifies the disclaimer notice that displays on the **login** page and in **footer text** on your KnowledgeTree Document Management System implementation.

Perform the following steps:

1. Use your administrator login to open the **Miscellaneous** section of **DMS Administration**; then, click **Edit Disclaimers**.
2. **Do you want to ...**
 - **change disclaimer text?** Click **Edit** in the **Actions** column for the disclaimer you want to change to open the **Page / Login Disclaimer** page. Enter the text you require; then, click **Update** to save your changes. The text you updated displays immediately.
 - **remove the disclaimer?** Click the **Clear** button in the **Actions** column for the disclaimer you want to remove. The text is immediately removed.

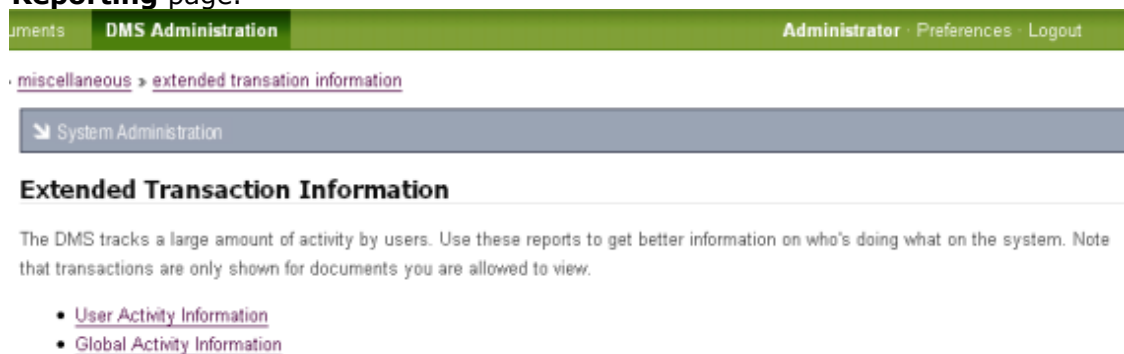
7.3.4.8 Extended Transaction Information

7.3.4.8.1 Generating Transaction Reports

KnowledgeTree allows you to generate reports of activity in the DMS - by user, or by date and type of transaction.

Perform the following steps:

1. Use your administrative credentials to log in to the Web interface of the DMS; then, click on the **Miscellaneous** page in **DMS Administration**.
2. Click **Extended Transaction Reporting** to open the **Extended Transaction Reporting** page.



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

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

number of items to display). When you're done, click **show transactions**.

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

Global Activity

Specify Search Details

In order to refine the kind of information shown to you, please provide further information below.

Date Range •
Either select a range in which to view the actions, or specify the number of days into the past to view.

transactions in the last days
 after: — and/or before: —

Transaction Type •
Select what kind of report you'd like to view.

All Actions

Show Items
Specify the maximum items to show, or leave it at zero or blank to show all transactions matching your report

transactions.

Show 3 of 3 transactions.

User	Document	Action	Date	Content version	Comment
Administrator	Strategy	Create	2006-09-21 12:11:14	0.1	Document created
Administrator	Cost Analysis	Create	2006-09-21 12:10:30	0.1	Document created
Administrator	Budget 2007	Create	2006-09-21 12:09:54	0.1	Document created

Figure: Global Activity Report

7.3.4.9 Edit Quicklinks


7.3.4.9.1 Add New / Edit Existing / Remove Dashboard Quicklinks

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

The administrative user adds and edits Quicklinks in the **Miscellaneous** section of **DMS Administration**.

Perform the following steps:

1. Use your administrative credentials to log in to KnowledgeTree's Web interface; then, open the **Miscellaneous** section in **DMS Administration**.
2. Click **Edit Quicklinks** to open the **Manage Quicklinks** page.
3. **Do you want to ...**

- **add a new quicklink?** Click **Create a new quicklink** to open the **New Quicklink** page. Browse the folder structure to the target document; then, select the radio button adjacent to the document. Click **Link** to create the link to this document. The system re-opens **Manage Quicklinks**, where you can view the link you added.
- **remove an existing quicklink?** View the list of existing quicklinks at the bottom of this page; then, click  for the link you want to remove.
- **change the way existing links are currently arranged on the Dashboard?** Click **Re-order quicklinks** to open the **Re-order Quicklinks** page. View the displayed list of existing links; then, use the **Up** and **Down** arrow keys to change the order of links. Click **Re- order** to save your changes.

7.3.5 KTIS Administration

You use the **KTIS Administration** section of **DMS Administration** to install the key you receive with your purchase of **KnowledgeTree Commercial Editions - 20** active users for **KnowledgeTree SMB**, or unlimited users for **KnowledgeTree Enterprise**.

Note: This section is only visible to users of **KnowledgeTree Commercial Editions**.

Managing keys involves:

- add / upload new keys
- view key expiry information
- enable / disable users (for the **KnowledgeTree SMB** subscription) in **Users and Groups**

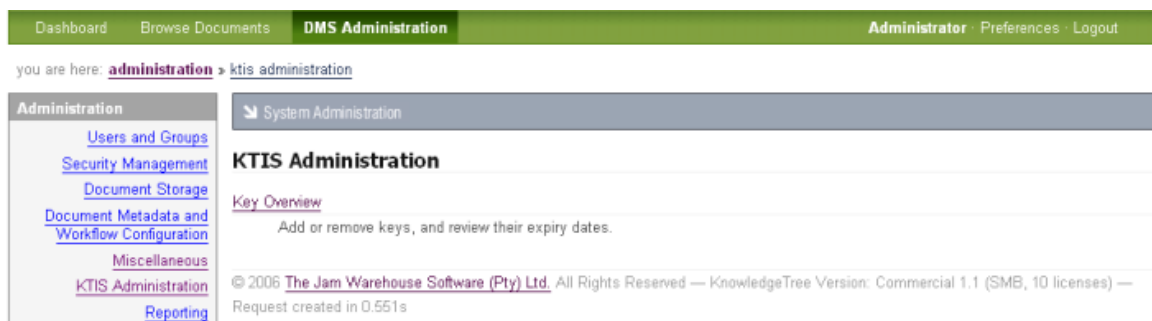


Figure: KTIS Administration Section

7.3.5.1 Key Overview

KnowledgeTree SMB Edition and **KnowledgeTree Enterprise Edition** are licensing options for **KnowledgeTree Commercial Editions** - the certified version of **KnowledgeTree Open Source Edition**.

Note: To find out more about KnowledgeTree Editions, see the [product comparison matrix](#).

Use the **Key Overview** page in **KTIS Administration** to:

- view currently active keys - including expiry dates
- add new keys for your organization from your local computer, or from the KnowledgeTree website

7.3.6 Reporting

The **Reporting** section of **DMS Administration** allows you to create user activity reports.

Note: Reporting is only available with the KnowledgeTree Commercial Editions - SMB and Enterprise.

7.3.6.1 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.

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 have ▼ logged into the system in the last week(s) ▼

Login activity

Want to know who all has logged in the system over a period of time? You can get an overview of all login activity for all users over a specified period of time.

Show login activity for the last week(s) ▼
 Show login activity between 2006/08/29 13:39 select and 2006/09/05 13:39 select

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**.

Figure: User Reporting page

[reporting](#) > [user reporting](#) (login history for jaime rath)

System Administration

Login history for Jaime Rath

Date	Action	Comments
2006-08-02 16:50:05	Login	Logged in from 127.0.0.1
2006-08-02 16:51:22	Logout	
2006-08-03 09:21:28	Login	Logged in from 127.0.0.1
2006-08-03 09:21:54	Logout	
2006-08-03 10:08:54	Login	Logged in from 127.0.0.1
2006-08-03 10:47:27	Logout	
2006-08-04 09:27:21	Login	Logged in from 127.0.0.1
2006-08-07 13:57:02	Login	Logged in from 127.0.0.1
2006-08-04 09:47:33	Timeout	Session timed out
2006-08-07 13:59:22	Logout	
2006-08-10 09:56:04	Login	Logged in from 127.0.0.1
2006-08-10 10:01:58	Logout	
2006-08-14 10:37:12	Login	Logged in from 127.0.0.1
2006-08-16 12:15:37	Login	Logged in from 127.0.0.1
2006-08-14 10:57:47	Timeout	Session timed out
2006-08-16 12:27:32	Logout	

View Login History for Selected User