

Version 3.5

**Altaris True-Knowledge™**

**Knowledge Base Management System**

*User's Guide and Reference*

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## **PART 1 – TRUE-KNOWLEDGE INTRODUCTION**

## Introduction

### Introduction

True-Knowledge™ is the premiere knowledge-base management tool for individuals and work groups. True-Knowledge is an information database manager which tracks and manages your formatted notes, tips, tricks, source code or other text-based information.

Intuitive and powerful, True-Knowledge's easy-to-use point-and-click Windows™ interface consists of a set of components to assist both users and administrators:

Component	Description
Launch Pad	Your starting point for the Knowledge Explorer and Management Console. Launch Pad also allows you to create and manage your connection profiles. Connection profiles will allow you to connect to multiple databases and projects.
Knowledge Explorer	Allows you to create and store knowledge articles in custom folders similar to the Microsoft TechNet database. Using the Knowledge Explorer you have full preview access to articles as well as the powerful rich-text article editor and full-text search engine.
Management Console	Gives you total control over the database and offers powerful customization and management functions.

### More Utilities

In addition to the core set of application components, True-Knowledge includes the following utilities:

Utility	Description
Publisher for HTML Help	Used to publish knowledge base to Microsoft HTML Help files.
Compact & Repair Wizard	Compacts and repairs Microsoft Access (MS JET) databases.
Database Replication Wizard	Creates a copy of an existing Microsoft Access database where changes can be synchronized in the future.
Database Synchronization Wizard	Synchronizes changes between multiple Microsoft Access databases.
Migration Wizard	Migrates KB-Master 2.5 database data into True-Knowledge databases.
Data Transport Wizard	Provides data import and export functions.
Diagnostics	Provides installation and environment information.
Update Wizard	Checks the Altaris Web site for software updates.

**Feature Summary** The following table summarizes the major features in this edition of True-Knowledge v3.5.

<b>User Interface &amp; Customization</b>	
<b>Feature</b>	<b>Description</b>
Windows Themes	Windows XP/2003 user interface themes are supported.
Knowledge Explorer	<ul style="list-style-type: none"> <li>• Incorporates some Microsoft Outlook 2003 interface features</li> <li>• Reading pane permits full article preview</li> <li>• Reading pane can be docked either to the right or the bottom of the results pane</li> <li>• Locate folders after a search</li> <li>• Save favorite folders</li> </ul>
Article Editor	A powerful article gives you many formatting features that are only available in such products as Microsoft Word. Enhancements include support for bullets and numbering, tables, page layout, headers and footers, special symbols and a ruler.
Management Utilities	Task-based database and project management tools are provided within the Knowledge Explorer and Management Console utilities
Launch Pad	Provides simple starting point for multiple tools.
Management Console	Task-based interface for database and project management.
Powerful Search Tool	You can build simple or advanced queries using the provided field criteria. You can even view the generated SQL statements should you desire to use the same criteria in external reporting environments.
Search & Replace	You can search for and replace text across multiple articles within the same project.
Saved Searches	Your searches can be saved locally or within the database for future use.
E-Mail Articles	Articles can be mailed using either Internet Mail (SMTP) or MAPI (e.g. Outlook).

<b>Architecture</b>	
<b>Feature</b>	<b>Description</b>

Database Support	Microsoft SQL Server or MSDE Microsoft Access
Central Database	Multiple projects can be created within the same database allowing users to segregate their data.
Role-based Security	User accounts and role-based security have been added for more control. Access to database, projects and articles require valid account privileges.
Dedicated Task Tools	Many additional tools are included. In addition to the authoring and management tools, additional tools have been included (e.g. Database Wizard, Profile Manager, Data Transport Wizard, Compact Wizard, Replication and Synchronization Wizards, Migration Wizard, Publisher for HTML Help).
Connection Profiles	In case you need to connect to more than one database, connection profiles allow you to conveniently store and recall your database and project connection information.
Application Logging	A number of the True-Knowledge wizards now provide extensive action logs for informational and debugging purposes.
Migration Wizard	This tool is provided to help you migrate KB-Master 2.5 data to a True-Knowledge database.

<b>Collaboration</b>	
<b>Feature</b>	<b>Description</b>
Article Tracking	Special article properties are available for tracking and managing articles.
Attachments	Article attachments can include hyperlinks to external files and other targets.
Notes	Notes allow authors and collaborators to share information about an article.
Share Information	Profiles and search queries can be exported and shared with other users. The Data Transport Wizard can also be used to export and import project information.

### What's New in this Version?

<b>Item</b>	<b>Description</b>
Windows Themes	Windows XP/2003 user interface themes are supported.

---

Enhanced Knowledge Explorer	<ul style="list-style-type: none"><li>• Re-designed Knowledge Explorer incorporates some Microsoft Outlook 2003 interface features</li><li>• New search toolbar added to reading pane</li><li>• New reading pane now supports notes and attachments display</li><li>• Reading pane shows more article information</li><li>• Reading pane can be docked either to the right or the bottom of the results pane</li><li>• New system search filters added to track articles with attachments and notes</li></ul>
Manage from Explorer	The Management Console interface has also been incorporated into the Knowledge Explorer to reduce the need to switch between tools.
Enhanced Launch Pad	The Launch Pad has been simplified and streamlined.
Enhanced Management Console	New task-based interface
Other	Many other fixes and enhancements have been incorporated into this release

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## True-Knowledge Product Support

### Introduction

Altaris Systems offers many resources to help you use our products. You can search the online help, the reference manual (if applicable) or you can use one of the support resources available to you as an Altaris customer:

### Before You Contact Support

Before contacting support, we recommend the following:

- Perform a screen capture of the error.
- Document what you were doing when the problem occurred.

### Customer Care

To help you get the most out of our products, we offer a number of support resources. Just visit our support page at <http://www.altaris.com/support.asp>. Our support page contains a variety of resources such as our support policies, Bug Tracker, and searchable Resource Center message board.

**Bug Tracker:** This list contains all known bugs and issues with our product. Refer to this link to see if someone has already reported a similar problem.

**Resource Center:** Our resource center is intended to be the first support option for our customers. The resource center will allow both Altaris support and other customers to resolve issues in a public forum.

**Mail Support:** If you have a problem that needs personal or priority attention, send us an e-mail at [support@altaris.com](mailto:support@altaris.com). We strive to answer all support requests within 1-2 business days depending upon incident load.

### Contact Addresses

The Altaris web site, <http://www.altaris.com>\*, is the primary resource for users of Altaris Systems software. It contains information about Altaris Systems, product documentation and support files.

Please send e-mail to one of the following addresses if you have a question that isn't addressed on the Altaris Systems web site or if you need to contact Altaris Systems for any other reason:

Email Address	Use For
<a href="mailto:info@altaris.com">info@altaris.com</a>	General questions
<a href="mailto:sales@altaris.com">sales@altaris.com</a>	Sales and Licensing Related Questions
<a href="mailto:support@altaris.com">support@altaris.com</a>	Technical Support
<a href="mailto:beta@altaris.com">beta@altaris.com</a>	Beta Program Participation and Issues

## **PART 2 – GETTING STARTED**

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## Requirements and Installation

### Introduction

Before using True-Knowledge, you should have a working knowledge of your computer and its operating conventions. This chapter explains the system requirements and procedure for installing True-Knowledge.

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### System Requirements

True-Knowledge is designed for the following 32-bit operating systems:

Windows XP, 2000, 2003 or higher recommended

Altaris Systems does not officially support the following operating systems but the application should work assuming the latest service pack is installed (if applicable):

- Windows 98 (latest version)
  - Windows Millenium Edition
  - Windows NT 4.0 (latest service pack)
- 

### Additional Software Requirements

These components should already be installed on supported operating systems:

- Microsoft Data Access Components (MDAC) 2.5 Service Pack 2 (or higher)
  - Microsoft DCOM (for Windows 95 users)
  - Microsoft XML Parser 3.0 Service Pack 1 (or later)
- 

Notes
<ul style="list-style-type: none"><li>• You may obtain the latest release of the MDAC components from <a href="http://www.microsoft.com/data/download.htm">http://www.microsoft.com/data/download.htm</a>.</li><li>• You may obtain the latest release of the Microsoft XML parser from <a href="http://msdn.microsoft.com/library/default.asp?url=/downloads/list/xmlgeneral.asp">http://msdn.microsoft.com/library/default.asp?url=/downloads/list/xmlgeneral.asp</a></li></ul>



---

### Database Requirements

**Small Workgroups (1-25 users):** True-Knowledge supports Microsoft SQL Server 2000 Desktop Engine (MSDE) and Microsoft Access 2000-compatible (Jet 4.0) databases.

Microsoft Access is not required since the required database library and model will be installed automatically. However, Microsoft Access 2000 (or higher) is recommend for extended reporting or database functionality (e.g. full replication features).

**Large Groups/Enterprise:** Microsoft SQL Server 2000 (or higher). True-Knowledge may also work with Microsoft SQL Server 7.0 but this release of SQL Server is no longer officially supported by Altaris Systems.

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### Installing True-Knowledge

Follow these steps to install True-Knowledge on a machine:

---

<b>Step</b>	<b>Action</b>
1	Go to the folder where you downloaded the True-Knowledge installation executable and open it.
2	Follow the installation wizard prompts to complete the installation. Depending on your configuration, you may be prompted to reboot your computer.
3	See the <b>Getting Started</b> topic in this guide or the online help to begin using the application.

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# Getting Started

## Introduction

This section explains how to get started with True-Knowledge.

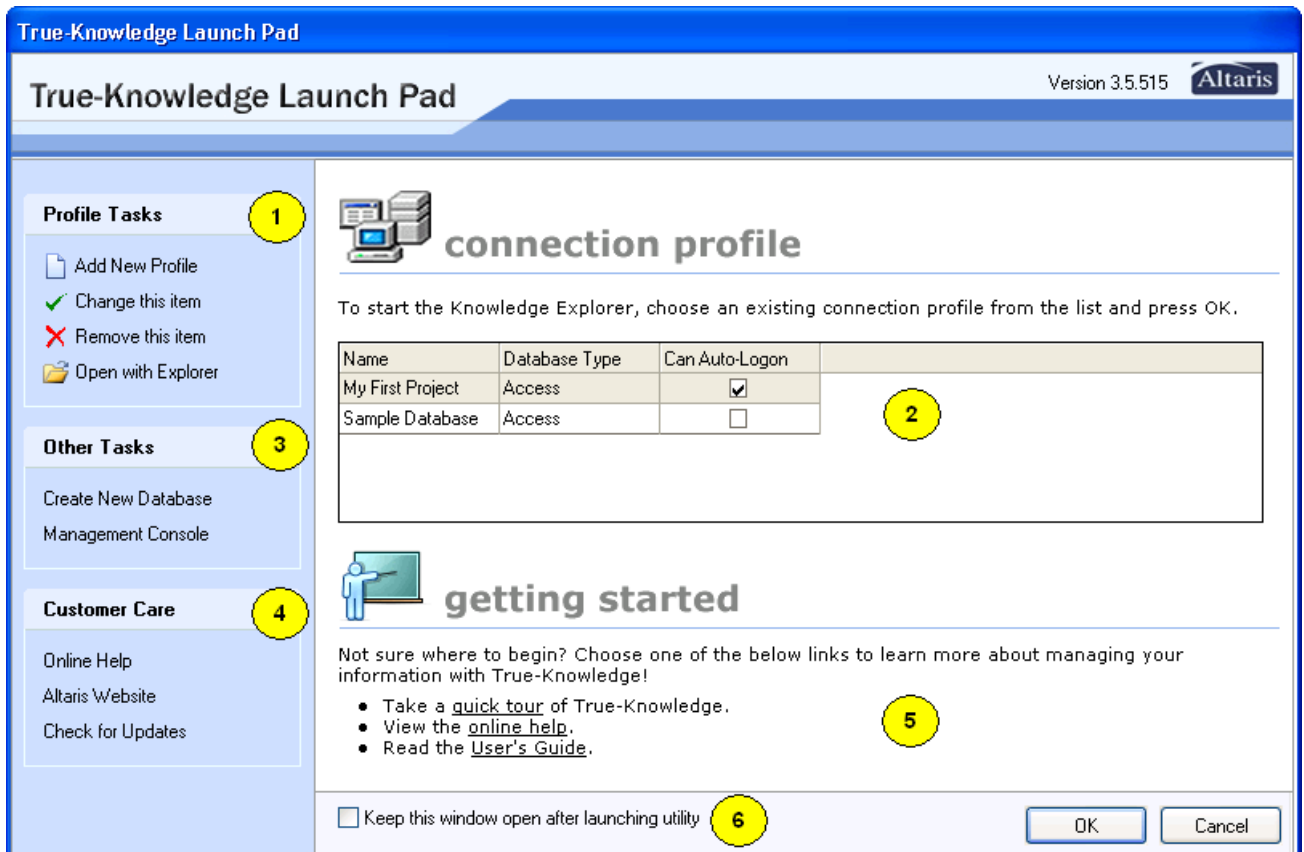
## Launch Pad

The Launch Pad is your starting point for launching the Knowledge Explorer, Management Console and other tasks such as profile management and database creation. Take some time to navigate the various menus and help topics to learn more about this tool.

## Starting the Launch Pad

Follow these steps to start the Launch Pad utility:

Step	Action
1	From the Windows <b>Start</b> menu, choose <b>All Programs &gt; Altaris True-Knowledge &gt; Launch Pad</b> .
2	<b>If this is your first time</b> using True-Knowledge or if no connection profiles exist on your machine, the <b>Database Wizard</b> will be displayed to assist you with creating a new database and project.
3	After the Launch Pad has started, you will be presented with the following dialog. The available options are described in the below sections.



Item	Comments
1-2	<p><b>Profile Management:</b> A connection profile enables you to connect to a True-Knowledge database and project. Use the tasks in Section 1 to manage your profiles. All profiles found on your computer will be displayed in Section 2. When you have selected a connection profile, press OK to open the Knowledge Explorer using the information contained in the selected profile.</p> <p><b>Auto-Logon:</b> In Section 2, any profile that has this field marked means that the profile contains project logon information. If you specify project information in your profile, the Knowledge Explorer will attempt to logon with this information rather than prompt you.</p>
3	<p><b>Other Tasks:</b> This section lists common tasks.</p> <p><b>Create New Database:</b> This task will launch the Database Wizard.</p> <p><b>Management Console:</b> This tasks will launch the Management Console.</p>
4	<p><b>Customer Care:</b> This section contains useful support links.</p> <p><b>Online Help:</b> Opens the online help file.</p> <p><b>Altaris Website:</b> Open the Altaris System Web site using your default Web browser.</p> <p><b>Check for Updates:</b> Connects to the Altaris Systems web site to check for newer version of the True-Knowledge software.</p>
5	This section contains additional support links.
6	By default, the Launch Pad will close after you launch one of the other utilities (e.g. Knowledge Explorer or Management Console). If you would rather leave the Launch Pad open, select this option.

### Next Steps

Read the following sections:

- [Managing Profiles with Launch Pad](#)
- [Using the Database Wizard](#)

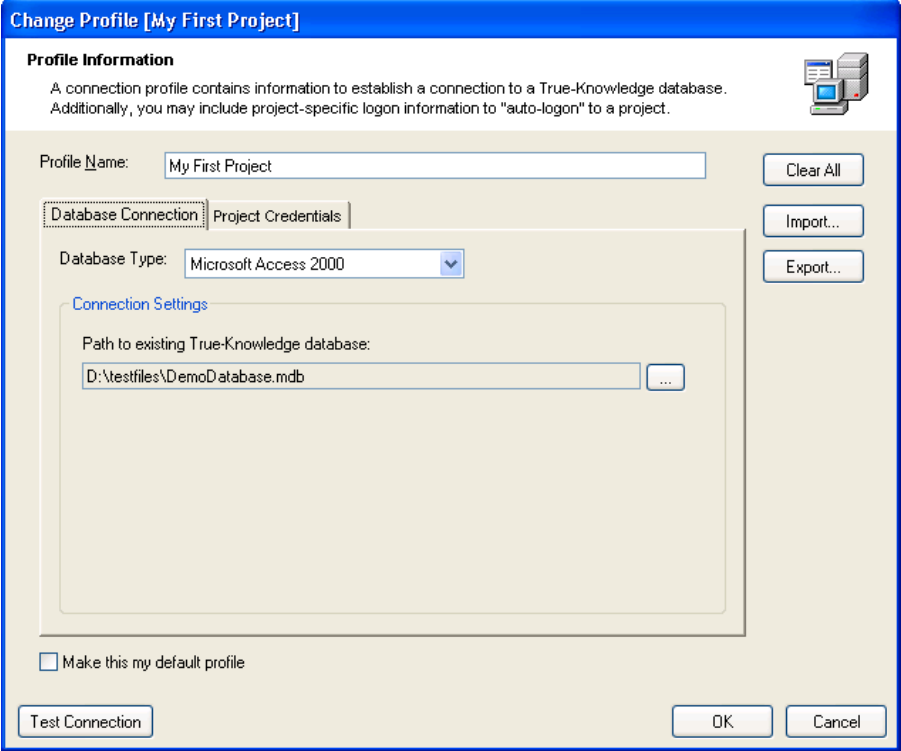
# Managing Profiles with the Launch Pad

## Introduction

This section explains how to manage connection profiles with the Launch Pad utility.

## Managing Profiles

Follow these steps to manage connection profiles with the Launch Pad utility.

Step	Action
1	From the Windows <b>Start</b> menu, choose <b>All Programs &gt; Altaris True-Knowledge &gt; Launch Pad</b> .
2	If you would like to create a new profile, choose <b>Add New Profile</b> from the <b>Profile Tasks</b> section. Otherwise, select one of the other applicable tasks. The remaining steps assume you have either selected <b>Add New Profile</b> or <b>Change this Item</b> .
3	<p>The <b>Profile Editor</b> is now displayed. Enter the appropriate fields on the <b>Database Connection</b> tab.</p> 
4	<p>Test your database connection, by pressing the <b>Test Connection</b> button. If your connection test fails, correct the error and try again.</p> <p><b>Note:</b> If this profile is for a database that does not have project information, <b>STOP HERE</b> and proceed to <b>Using the Management Console</b>. After you have generated project data, you may return to this page either to update the connection profile or create a new profile reflecting the project details.</p>

5

Select the **Project Credentials** tab, and enter the appropriate field information.

**Change Profile [My First Project]**

**Profile Information**  
A connection profile contains information to establish a connection to a True-Knowledge database. Additionally, you may include project-specific logon information to "auto-logon" to a project.

Profile Name: My First Project

Database Connection: Project Credentials

**Project Information**  
Project Name: My First Project

**Login Credentials**  
Account: jsmith  
Password: \*\*\*\*\*

Make this my default profile

Test Connection

Clear All  
Import...  
Export...  
OK  
Cancel

6

Press **OK** to save your connection profile.

# Using the Database Wizard

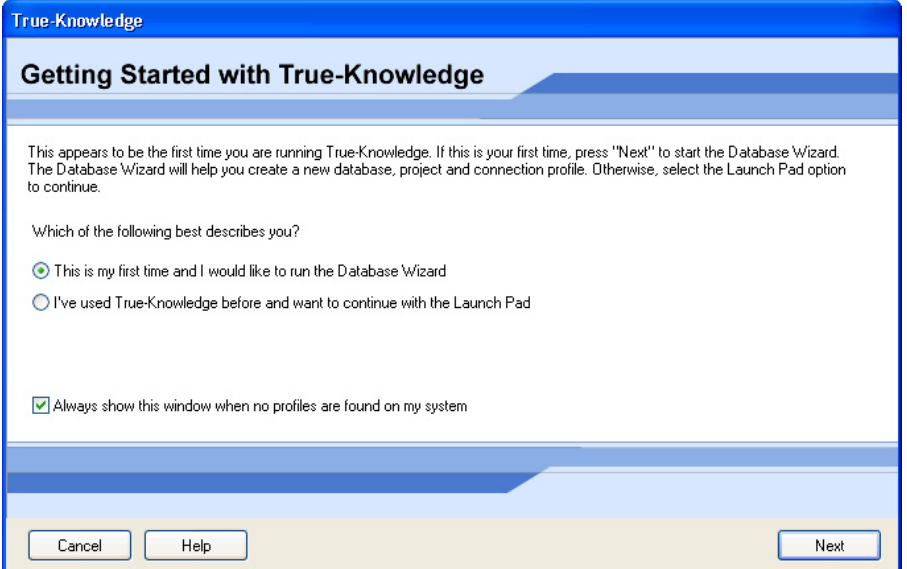
## Introduction

This section explains how to use the Database Wizard.

## Using the Database Wizard

The **Database Wizard** will help you to perform all the tasks necessary to create a new True-Knowledge database and project. If you start the [Launch Pad](#) and do not have any connection profiles on your computer, the Database Wizard will automatically be displayed. You may also manually launch the Database Wizard from the Launch Pad.

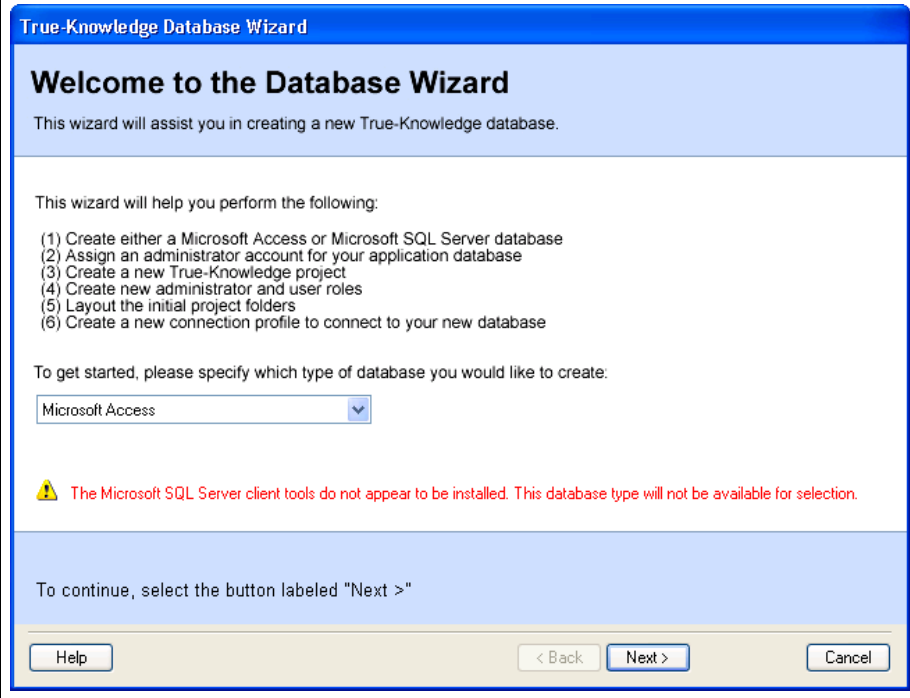
Follow these steps to manually start the Database Wizard utility:

Step	Action
1	Start the True-Knowledge Launch Pad.
2	If this is your first time using True-Knowledge or if no connection profiles exist on your machine, the <b>Database Wizard</b> will be displayed to assist you with creating a new database and project. Otherwise, select <b>Create New Database</b> task from the <b>Other Tasks</b> section.
3	<p>If no profiles are installed on your computer, you will see the Database Wizard introduction screen.</p> 

4

Press **Next** to continue to the first page. Select a database type from the drop-down list and press **Next** to continue.

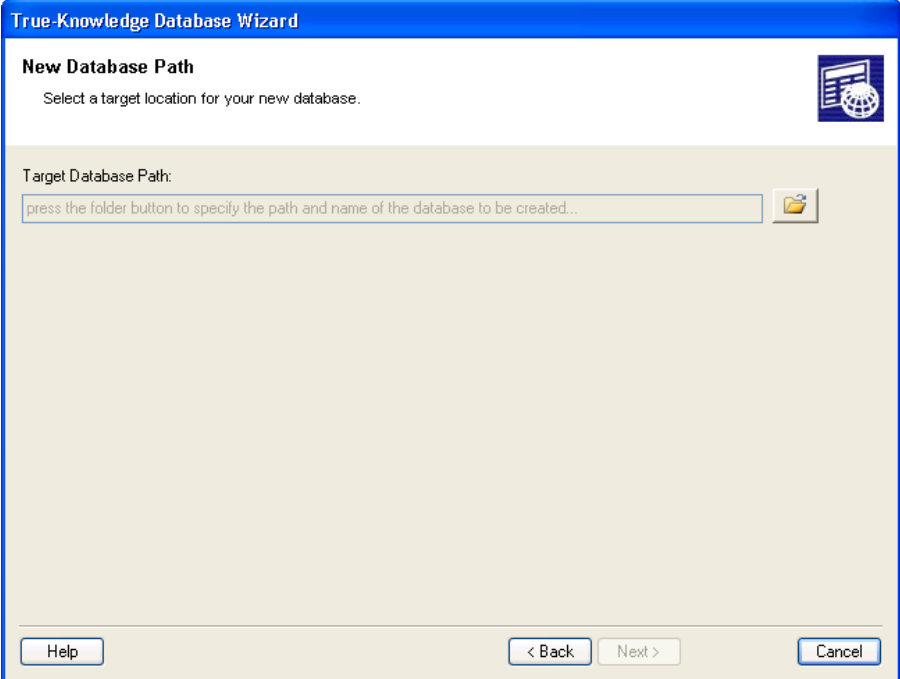
**Note:** If the Microsoft SQL Server client tools are not found on your computer, you will only be able to select **Microsoft Access** from the database list.



5

On the **Database** page, specify the proper new database information depending upon the database type that you have selected. Press **Next** to continue.

**Note:** If you are creating a Microsoft SQL Server or MSDE database, you will need proper logon credentials to connect to Microsoft SQL Server.



The screenshot shows a dialog box titled "True-Knowledge Database Wizard" with a blue header bar. Below the header, the title "New Database Path" is displayed in bold. Underneath, the instruction "Select a target location for your new database." is shown. In the top right corner, there is a small icon of a globe with a document. The main area of the dialog is light beige and contains a text box labeled "Target Database Path:" with the placeholder text "press the folder button to specify the path and name of the database to be created...". To the right of the text box is a folder icon button. At the bottom of the dialog, there are three buttons: "Help" on the left, "< Back" in the center, and "Next >" on the right, followed by a "Cancel" button on the far right.

6

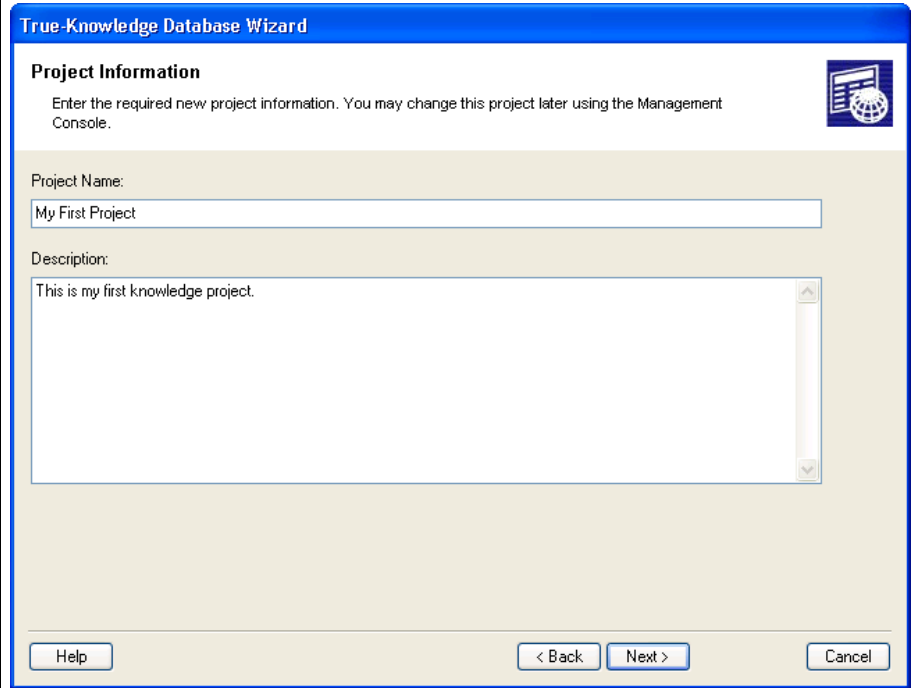
On the **Administrator Accounts** page, you can create a new True-Knowledge Administrator account within your new database. Additionally, a new True-Knowledge database will contain a SUPERUSER account named **Admin** with a blank password. Be sure to specify a new password for the **Admin** account on this page. Press **Next** to continue.

7

On the **Security Roles** page, you may accept the default security roles or rename these roles. Press **Next** to continue.

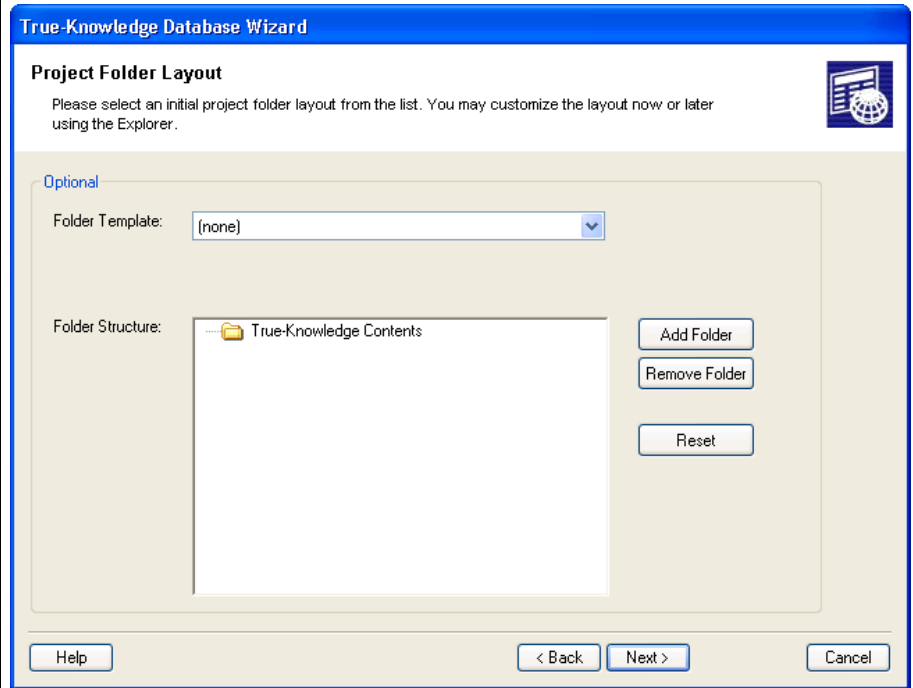
8

On the **Project Information** page, specify the name of the new project that will be created within your new database. Press **Next** to continue.



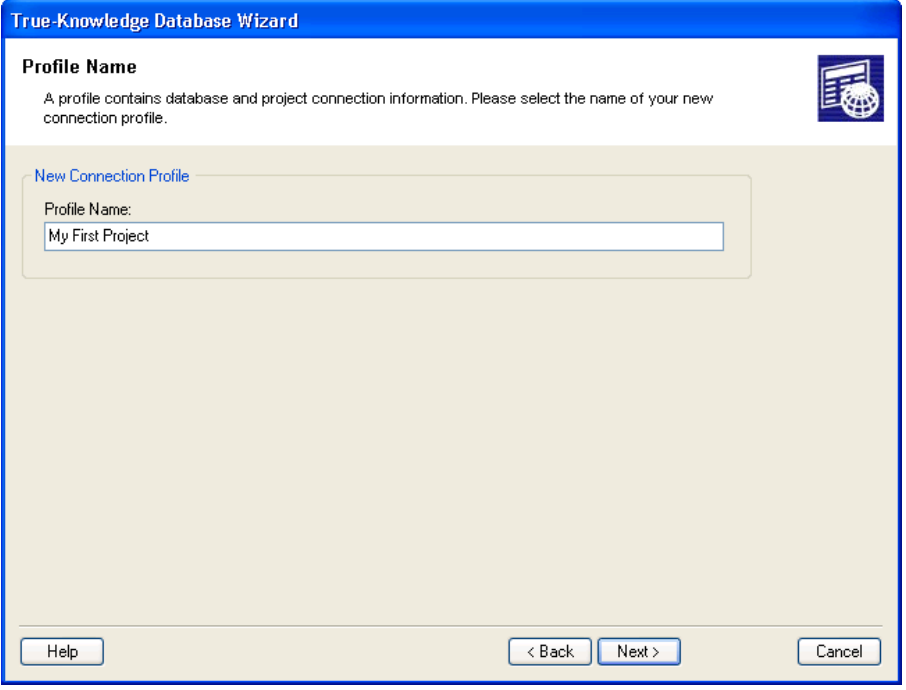
9

On the **Project Folder Layout** page, you may select one of the template folder layouts or create your own. You can always change the folder layout from the Knowledge Explorer but this is a good opportunity to do as the database and project are created. Press **Next** to continue.



10

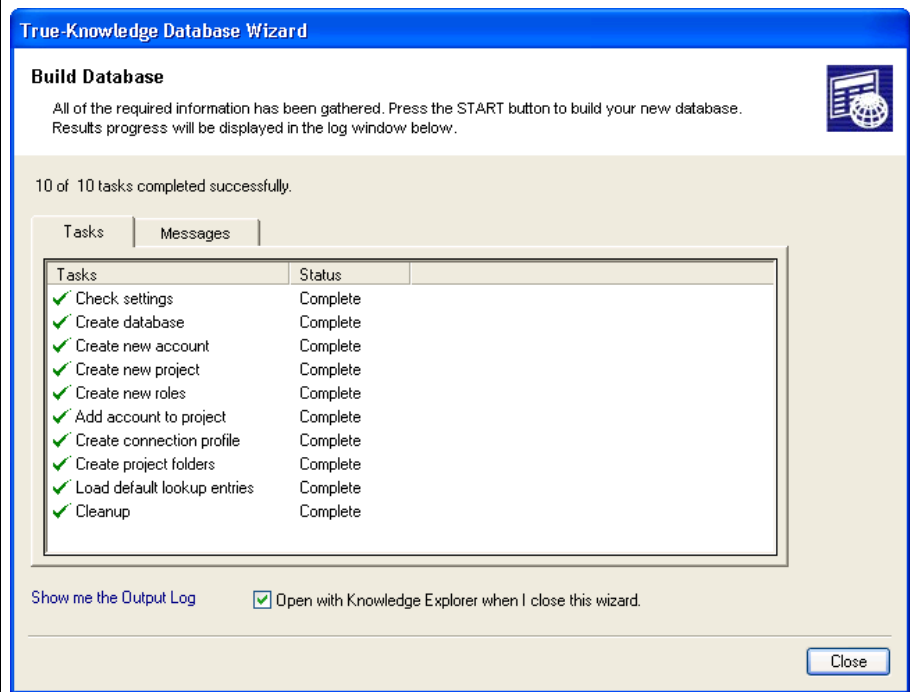
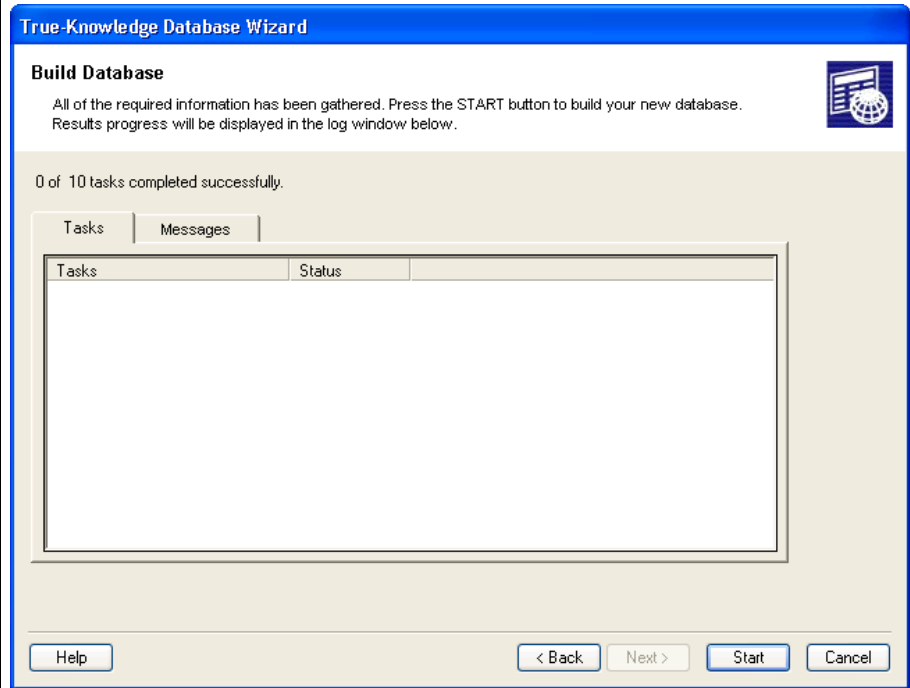
On the **Profile Name** page, specify the new of a new connection profile. This profile will automatically be create with all of the information required to connect to your new database and project. Once the wizard has been completed, you will see your new profile listed within the **Launch Pad** profile list. Press **Next** to continue.



The screenshot shows a window titled "True-Knowledge Database Wizard" with a blue header. Below the header, the page is titled "Profile Name" and includes a small icon of a globe and a document. A descriptive text states: "A profile contains database and project connection information. Please select the name of your new connection profile." Below this, there is a section titled "New Connection Profile" containing a "Profile Name:" label and a text input field with the value "My First Project". At the bottom of the window, there are three buttons: "Help", "< Back", and "Next >", and a "Cancel" button on the far right.

11

On the **Build Database** page, press **Start** to begin the database and project generation process. When all of the tasks have been completed, you will see the final results and addition options. If you leave the option **Open with Explorer...** marked, you will automatically open the Knowledge Explorer with your new profile after you press the **Close** button.



12

Press **Close** to close the wizard and start the Knowledge Explorer (if this option is selected).



## **PART 3 – Knowledge Explorer**

# Knowledge Explorer – Getting Started

## Introduction

The **Knowledge Explorer** is your primary tool for managing True-Knowledge articles and folders. The Knowledge Explorer workspace contains a lot of functionality to help you create, maintain and track your article. If you have the proper security settings, you may also manage your database from the Explorer. Take some time to navigate the various menus and help topics to learn more about this tool.

## Requirements

Before you can use the Knowledge Explorer, you must have:

- A valid connection profile that connects to an existing True-Knowledge database;
- A valid user account and project within the True-Knowledge database.

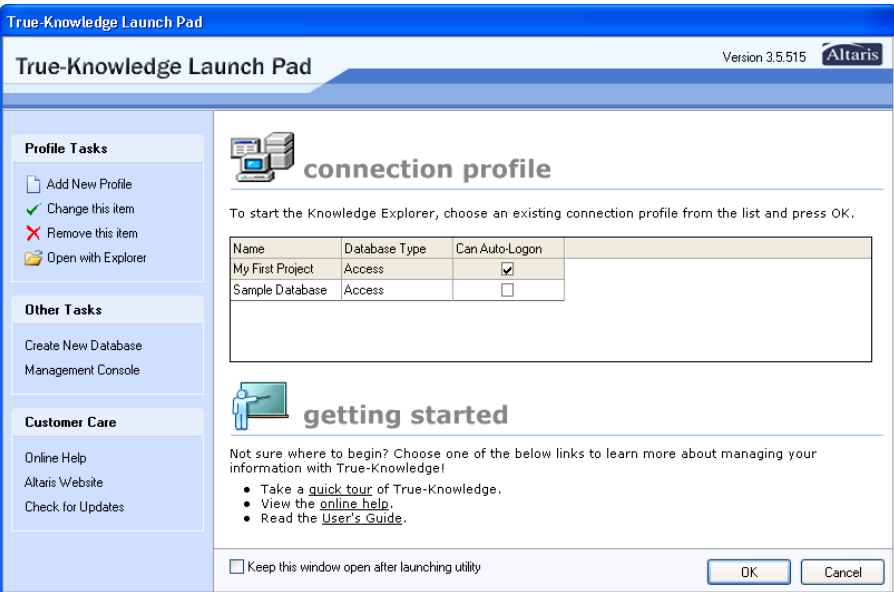
**NOTE:** The Database Wizard ensures that both of these requirements are met for new databases.

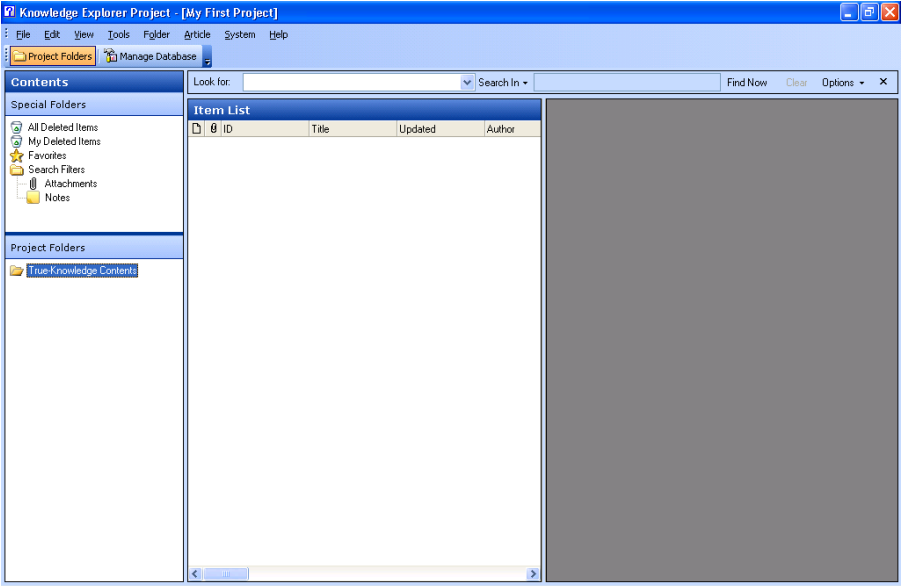
## Security Note

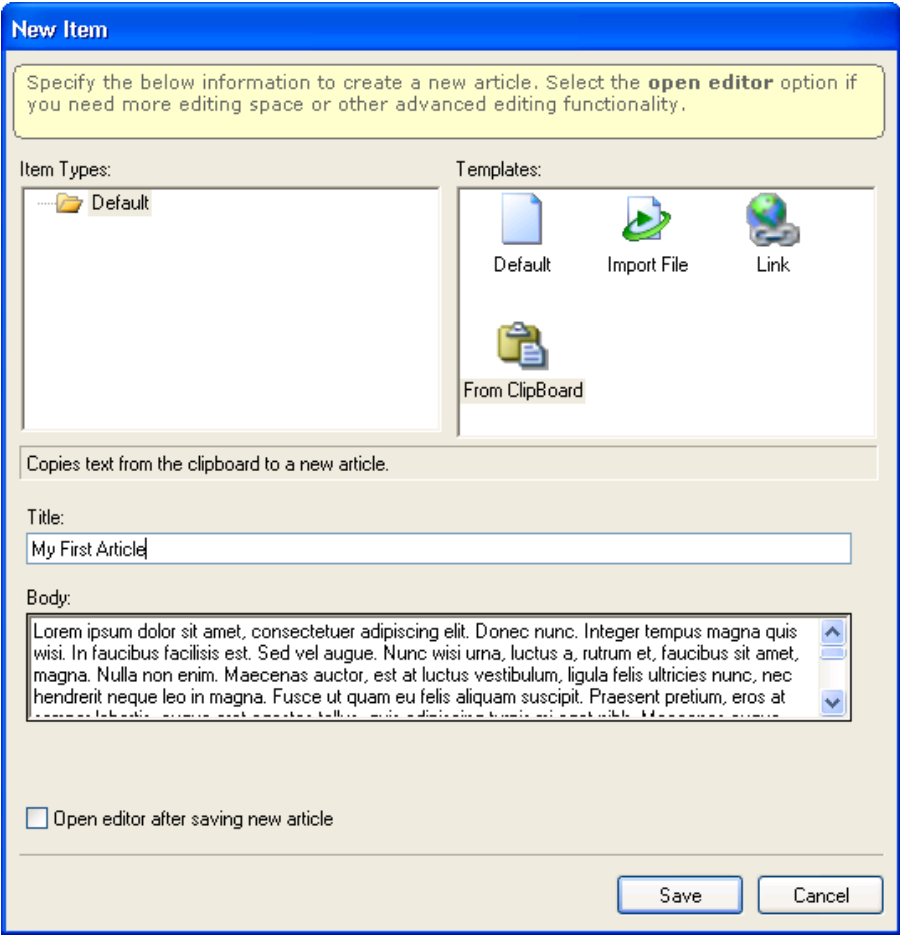
The availability and functionality of some operations may be determined by a user's security privileges.

## Starting the Knowledge Explorer

Follow these steps to start and connect to the Knowledge Explorer:

Step	Action
1	<p>Start the <b>Launch Pad</b>. Then select a profile from the list and press <b>OK</b>.</p>  <p><b>MANUAL START:</b> You can manually launch the Knowledge Explorer from the True-Knowledge program group. Alternatively, you can execute &lt;installation path&gt;\kexplore.exe.</p>

2	<p>If prompted for your profile, select an existing profile and press the OK button to connect. If your connection fails, please correct the error and try again.</p> <p><b>NOTE:</b> Your connection profile must contain both database connection and project logon information. If your profile does not contain this information or contains incorrect logon credentials, you will need to update your profile before you can use it to logon with the Knowledge Explorer.</p>
3	<p>Once connected, you are presented with have the Knowledge Explorer workspace as seen below. You are now connected and may proceed with managing your folders and articles.</p> 

<p>4</p>	<p>To create a new article, choose menu <b>Article</b> &gt; <b>New</b> or CTRL+N and you will be prompted with the <b>New Item</b> dialog.</p> 
<p>5</p>	<p>Select one of the available article template types, enter the article body and press <b>Save</b> to return to the Knowledge Explorer. If you want to use the advanced editor to continue editing your article, ensure the <b>Open editor after saving new article</b> option is selected.</p>

# Knowledge Explorer User Interface

## Introduction

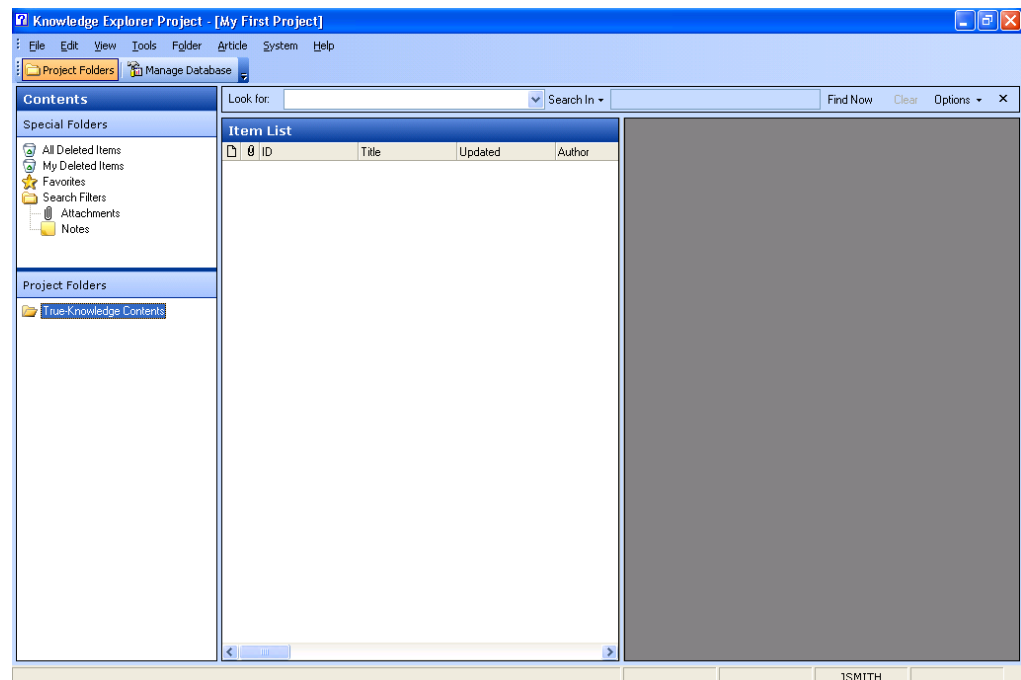
This chapter will introduce you to the various components of the True-Knowledge Knowledge Explorer user interface as well as techniques for customizing the True-Knowledge environment.

## General Layout

True-Knowledge displays a menu bar along the top of the screen with a variety of menu titles. Selecting a command from one of these menus either performs an action or displays a submenu or dialog.

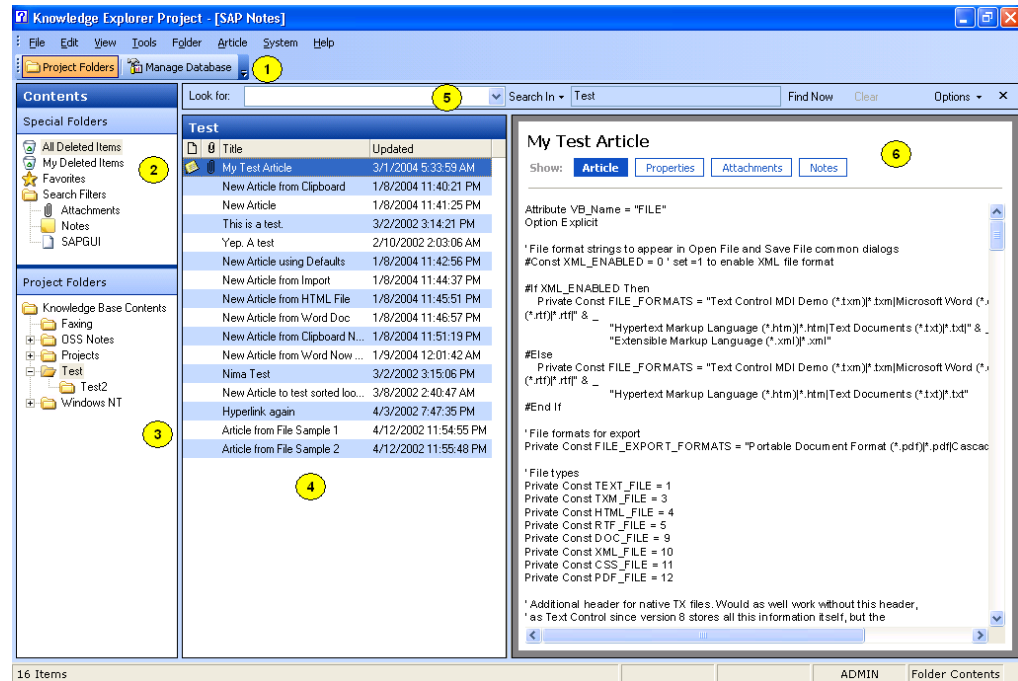
Directly below the menu bar is a workspace toolbar.

The Main Workspace area within the Explorer window is divided into one or more panes depending on the activity in progress. The following sections further explain the workspace elements.



## Project Folders Workspace

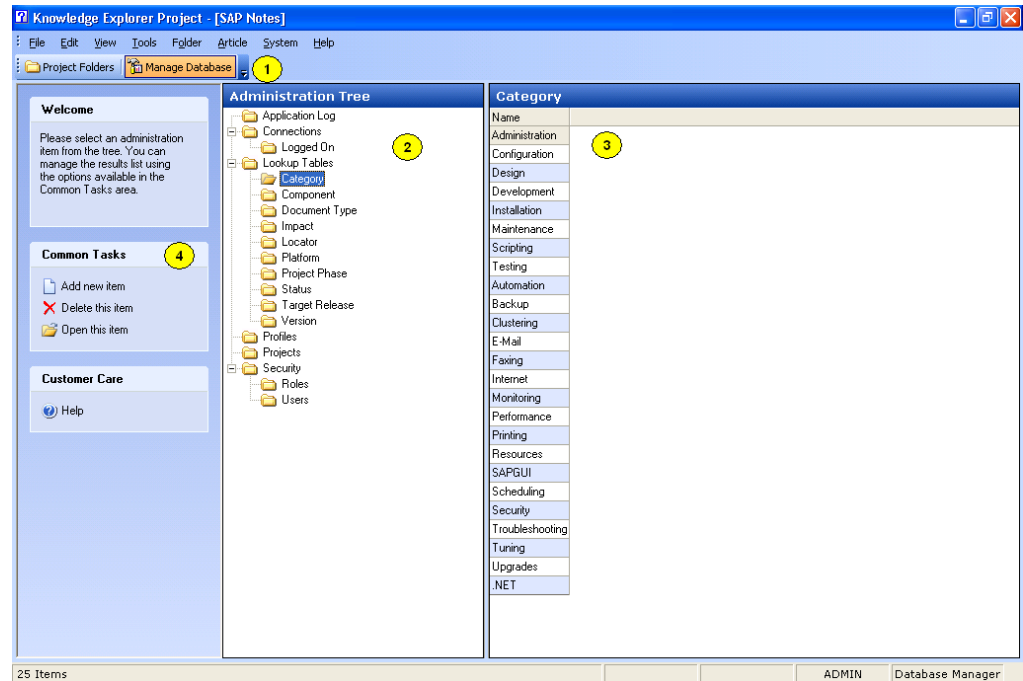
The **Project Folders** workspace is the primary workspace to be used for managing your project folders and articles. The following diagram and table further illustrate the Project Folders workspace.



Section	Description
1	<b>Workspace Toolbar:</b> Switch between Project Folders and Manage Database views.
2	<b>Special Folders:</b> Contains special folders and search filters.
3	<b>Project Folders:</b> Maintain your project folders here.
4	<b>Results Pane:</b> All search results will be displayed in this pane.
5	<b>Find Pane:</b> Common search tasks can be performed from this pane. This pane can be hidden.
6	<b>Reading Pane:</b> Articles can be previewed in this pane. This pane can be placed to the right or below the Results Pane. This pane can also be hidden.

## Manage Database Workspace

The **Manage Database** workspace strongly resembles the standalone **Management Console**. As such, the sections on the **Management Console** should be consulted for usage instructions.



Section	Description
1	<b>Workspace Toolbar:</b> Switch between Project Folders and Manage Database views.
2	<b>Administration Tree:</b> Contains management components organized into a tree.
3	<b>Results Pane:</b> All search results will be displayed in this pane.
4	<b>Task Pane:</b> Contains tasks depending upon the selected item within the Administration Tree.

# Managing Folders

**Introduction**

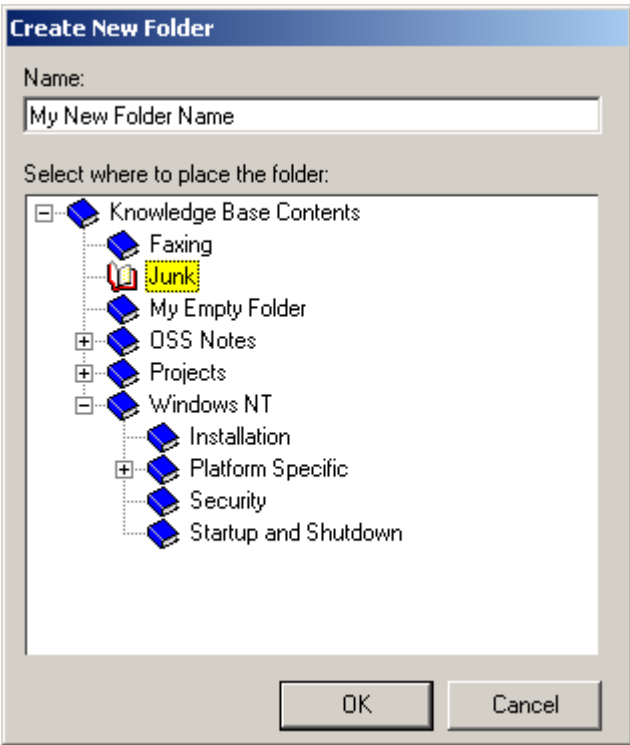
This sections explains how to perform basic folder management tasks using the Knowledge Explorer.

**Folder Tip**

All available folder actions can found under the **Folder** menu or by right-clicking on a folder. The available folder actions will depend upon the type of folder selected (e.g. project, special).

**Add Folder**

Follow these steps to create a new project folder.

Step	Action
1	Start the Knowledge Explorer.
2	Choose menu <b>Folder</b>   <b>New Folder</b>
3	<p>From the <b>Create New Folder</b> dialog, select the target parent folder. Then type a name for your new folder.</p> 
4	Press <b>OK</b> to save your changes.

**Rename Folder**

Follow these steps to rename a project folder.

**Note:** Special folders (e.g. deleted items) cannot be renamed.

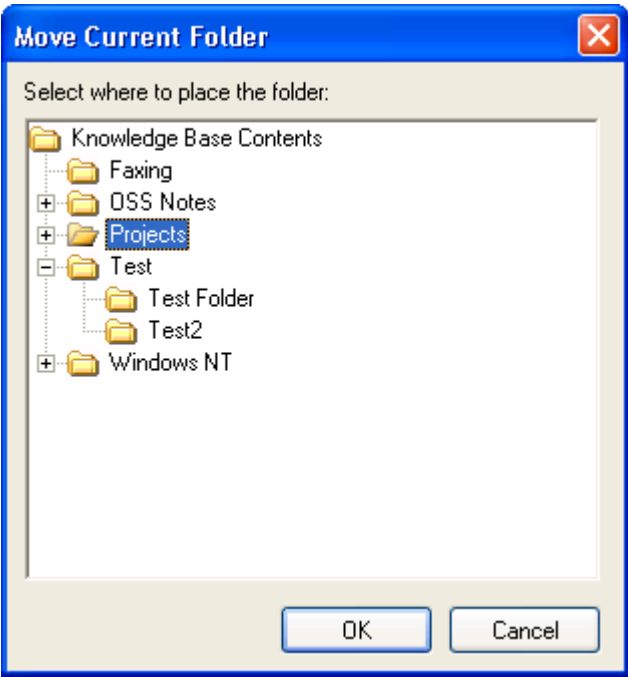
Step	Action
------	--------

1	Start the Knowledge Explorer.
2	Navigate to the target folder and select the folder.
3	Choose menu <b>Folder   Rename Folder</b>
4	The project folder will now allow you to rename the folder. When you are finished editing the name, press <b>Enter</b> to save your changes.  <b>Tip:</b> To cancel the rename operation, press <b>Esc</b> .

**Move Folder**

Follow these steps to move a project folder.


**Note:** Special folders (e.g. deleted items) cannot be moved.

Step	Action
1	Start the Knowledge Explorer.
2	Navigate to the target folder and select the folder.
3	Choose menu <b>Folder   Move Folder</b> .
4	From the <b>Move Current Folder</b> dialog, select the new folder location.  
5	Press <b>OK</b> to save your changes.

**Remove Folder**

Follow these steps to remove a project folder.

**Note:** Special folders (e.g. deleted items) cannot be removed.

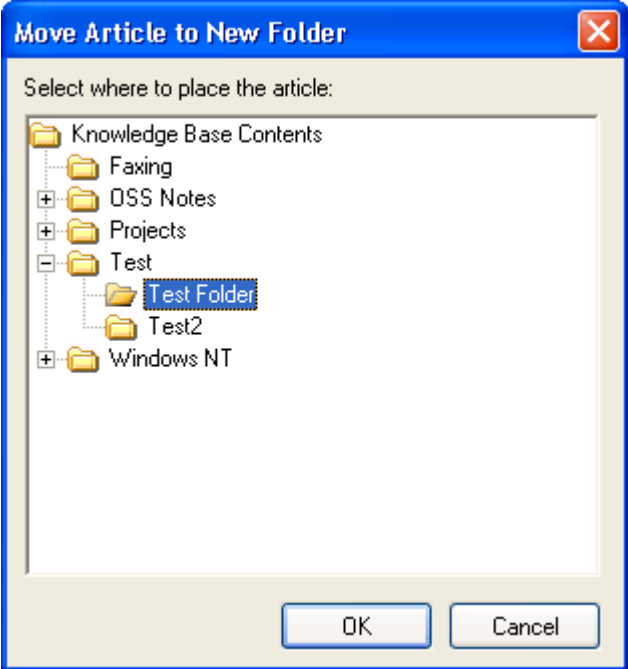
Step	Action
1	Start the Knowledge Explorer.
2	Navigate to the target folder and select the folder.
3	Choose menu <b>Folder   Delete Folderb.</b>
4	At the <b>Confirm Folder Removal</b> dialog, confirm your choice by choosing <b>Yes</b> . 
5	This folder and all articles within this folder will be removed from the database.

### Restore Deleted Articles

Follow these steps to restore articles from the **My Deleted Items** or **All Deleted Items** folders..

**Note:** Articles that were deleted during a folder removal cannot be restored from the **Deleted Items** folder.

Step	Action
1	Navigate to and select either the <b>My Deleted Items</b> or <b>All Deleted Items</b> folder.
2	From the results pane, select (do not open) the article.
3	To restore the article to it's original folder, choose menu <b>Article   Restore</b> . If you would rather restore to a different folder choose menu <b>Article   Move to Folder</b> .

4	<p>If you selected <b>Article   Restore</b>, the article will be restored to the folder in which it was deleted from.</p> <p>If you selected <b>Article   Move to Folder</b>, from the <b>Move Article to New Folder</b> dialog, select a new folder location.</p> 
5	<p>Press <b>OK</b> to save your changes.</p>

**Add to Favorites Folder**

Follow these steps to add an article to your **Favorites** folder.

**Note:** If you choose the menu **Article | Locate** you can view the folder to which the article belongs.

Step	Action
1	Generate an article results list either by select a folder or running a search query/filter.
2	From the results list, select (do not open) the article.
3	Choose the menu <b>Article   Add to Favorites List</b> . The article will now also appear in the <b>Favorites</b> folder.

**Remove from Favorites Folder**

Follow these steps to remove an article from your **Favorites** folder.

**Note:** These steps will not remove the article from your database.

Step	Action
------	--------

1	Navigate to the <b>Favorites</b> folder and select the folder.
2	Select, but do not open, the article.
3	Choose menu <b>Article   Delete</b> . This will only remove the article from your <b>Favorites</b> folder.

---

## Managing Articles

### Introduction

This section explains how to perform basic article management tasks.

### Locate Folder for Article

In some circumstances (e.g. after running a search), you are presented with a list of articles and would like to know in which folder an article resides.

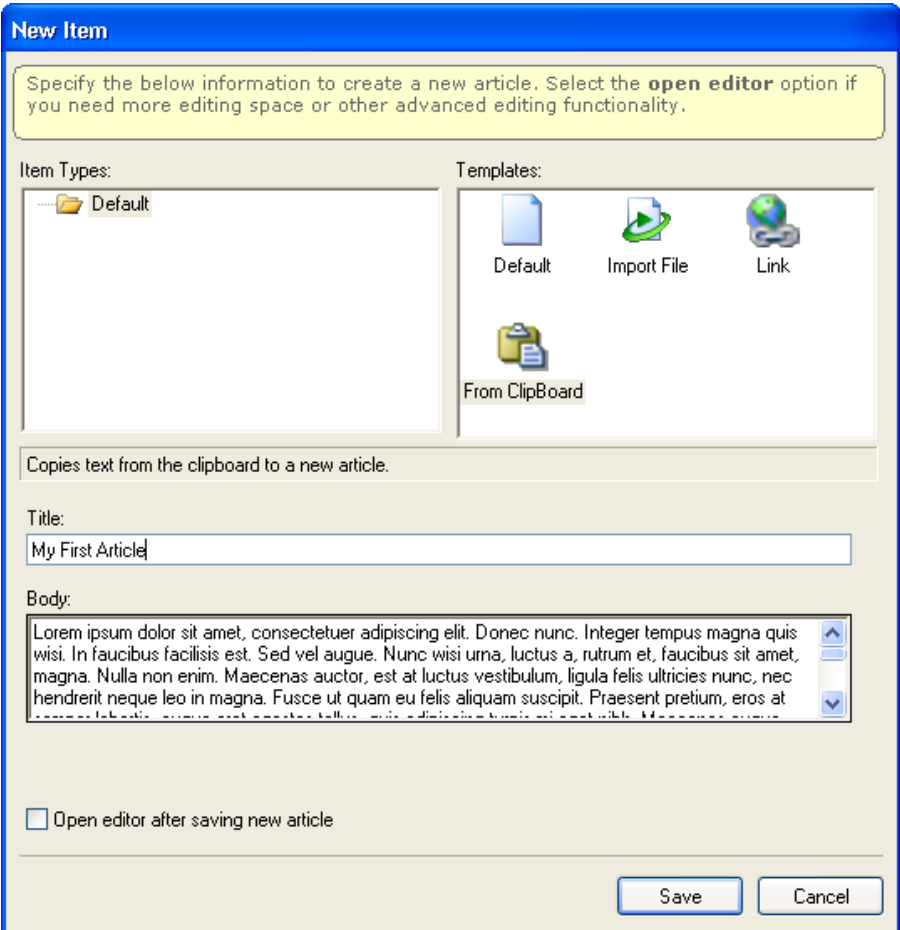
Follow these steps to locate the folder for an article.

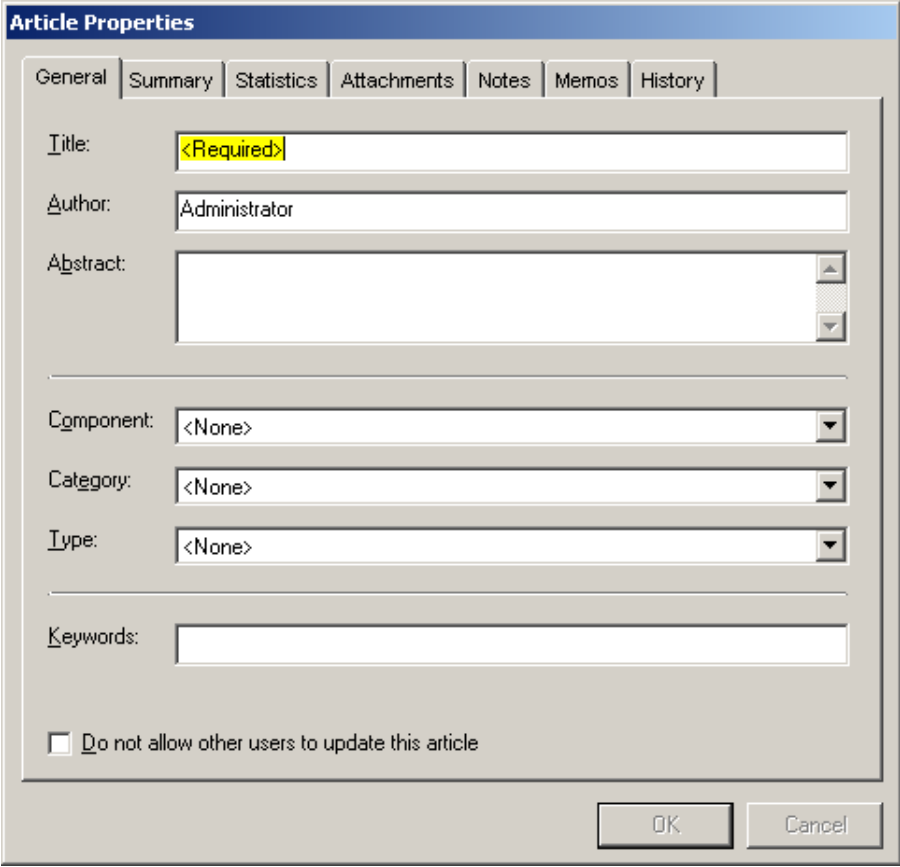
Step	Action
1	Generate an article results list either by selecting a folder or executing a search query or filter.
2	Select the article from the list, and choose the menu <b>Article   Locate</b> . Alternatively, you can right-click on the article and choose <b>Locate</b> from the context menu.  The Explorer will automatically expand and highlight the article's folder location.

### Add Article

To create a new article:

Step	Action
1	Start the Knowledge Explorer.
2	Navigate to and select the folder where you would like to store the article.

<p>3</p>	<p>To create a new article using the <b>Basic Editor</b>, choose menu <b>Article   New</b> (or CTRL+N) and you will be prompted with the <b>New Item</b> dialog.</p> 
<p>4</p>	<p>Select one of the available article template types. Then enter the article body and press <b>Save</b> to return to the Knowledge Explorer.</p> <p><b>NOTE:</b> If you want to use the <b>Advanced Editor</b> to continue editing your article, ensure the <i>“Open editor after saving new article”</i> option is selected.</p>

<p>5</p>	<p><b>Advanced Editor</b></p> <p>When prompted for article properties, you are required to provide a <b>Title</b> for the article. All other properties are optional. When you have updated the desired properties, press <b>OK</b> to edit the article contents.</p> 
<p>6</p>	<p>Once you have completed your article, choose toolbar option <b>Save and Close</b>. Alternatively, you can choose menu <b>File   Save</b> and then menu <b>File   Back</b>.</p>

**Change Article**

To change an existing article:

Step	Action
<p>1</p>	<p>Generate an article results list either by select a folder or running a search query or filter.</p>
<p>2</p>	<p>From the results pane, select an article.</p> <p>You may open the article for editing by one of the following actions:</p> <ul style="list-style-type: none"> <li>(1) double-clicking the article,</li> <li>(2) choosing menu <b>Article   Open</b>, or</li> <li>(3) right-clicking and choosing <b>Open</b> from the context popup-menu.</li> </ul>

3	The article is now available for changes within the Article Editor.
4	Once you have completed your article, choose toolbar option <b>Save and Close</b> .  Alternatively, you can choose menu <b>File   Save</b> and then menu <b>File   Back</b> .

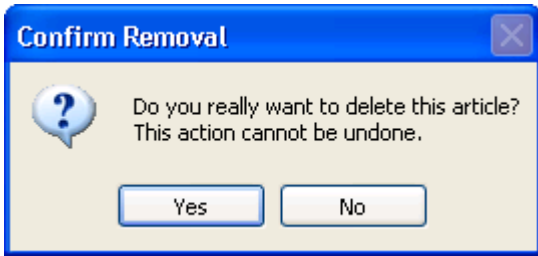
### Remove Article (Flag for Delete)

To remove an existing article:

Step	Action
1	Generate an article results list either by select a folder or running a search query or filter.
2	From the results pane, select an article.  You may remove the article by one of the following actions: (1) choosing menu <b>Article   Delete</b> , or (2) right-clicking and choosing <b>Delete</b> from the context popup-menu.
3	This article will now be moved to the <b>Deleted Items</b> folder and will allow you to restore the article in the future.

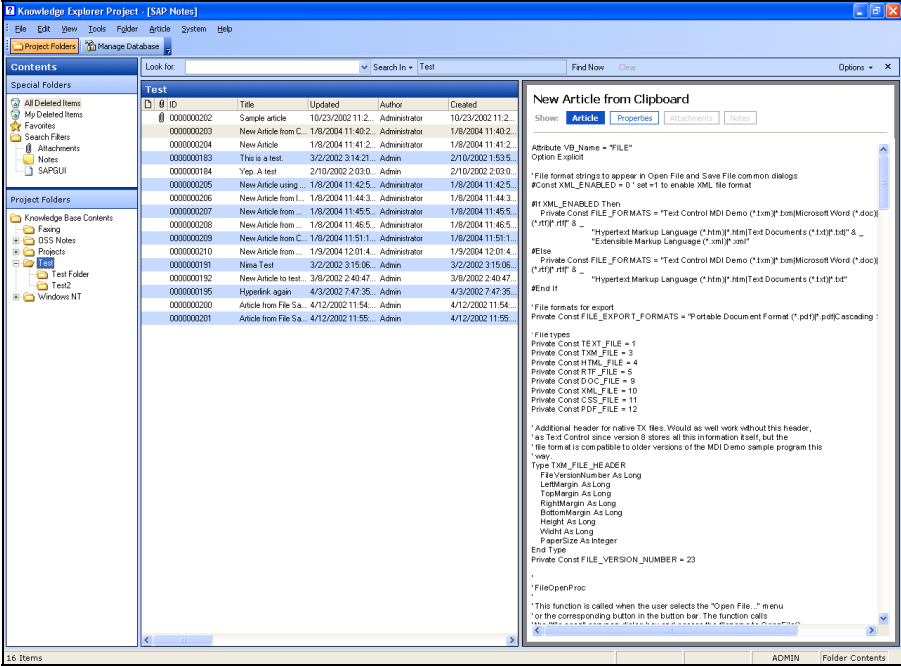
### Remove Article (From Database)

Initially, deleted articles are stored in the **Deleted Items** folder but not removed from the database. To remove the article from the database, follows these steps:

Step	Action
1	Navigate to the <b>Deleted Items</b> folder and select the folder. You should see a list of "deleted" articles in the results pane.
2	Select but do not open the desired article.
3	Choose menu <b>Article   Delete</b> . You will be prompted with a confirmation dialog.  
4	If you press <b>Yes</b> at the confirmation prompt, the article will now be removed from the database and can only be restored from a database backup/

**Preview Article in Reading Pane**

To display an article in the Reading Pane:

Step	Action
1	Generate an article results list either by selecting a folder or running a search query or filter.
2	<p>From the results pane, select (i.e. single-click) an article. The article body and properties will be displayed in the preview pane.</p>  <p>The screenshot shows the Knowledge Explorer interface. On the left, a tree view shows 'Project Folders' including 'Test'. The main pane displays a table of articles with columns for ID, Title, Updated, Author, and Created. The 'New Article from Clipboard' pane on the right shows the content of a selected article, including file formats and XML headers.</p>

**Manage Attachments**

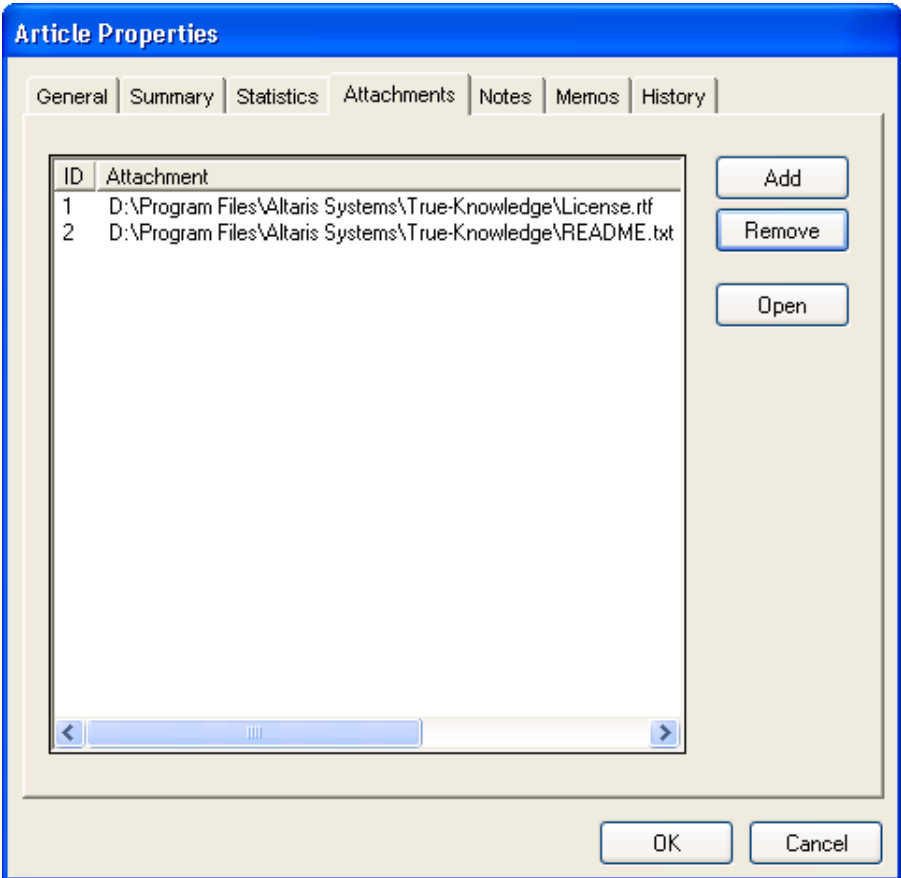
To add an attachment using the Article Editor:

**NOTE:** Full universal naming convention (UNC) paths should be used when adding attachments. A UNC path follows the format:

`\\<computer name>\<path>\<file>.`

By using the UNC path to an attachment, other users will be able to access the attachment if the file is available.

Step	Action
1	Create a new article with the Advanced Editor or open an existing article.
2	From the Article toolbar, choose the <b>Properties</b> button. You will now see the properties dialog.

<p>3</p>	<p>Click on the <b>Attachments</b> tab. You may now Add, Remove or Open attachments as needed.</p> 
<p>4</p>	<p>When you are finished managing the article's attachments, press the <b>OK</b> button to return to editing the article body.</p>

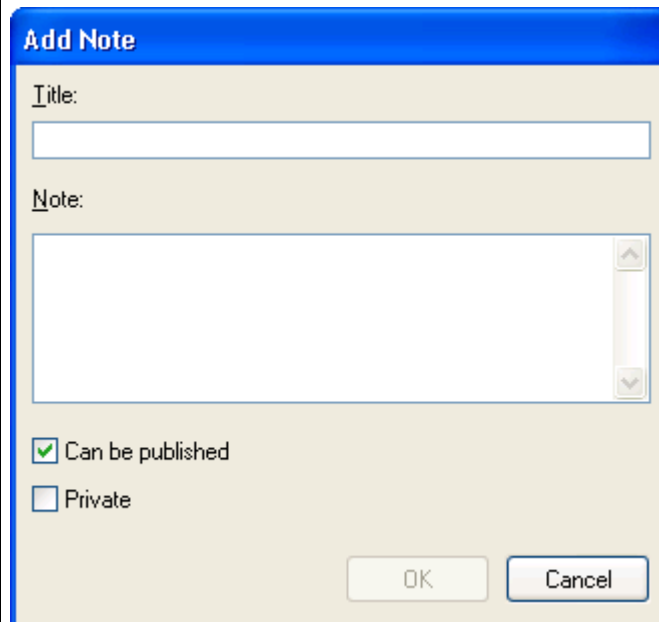
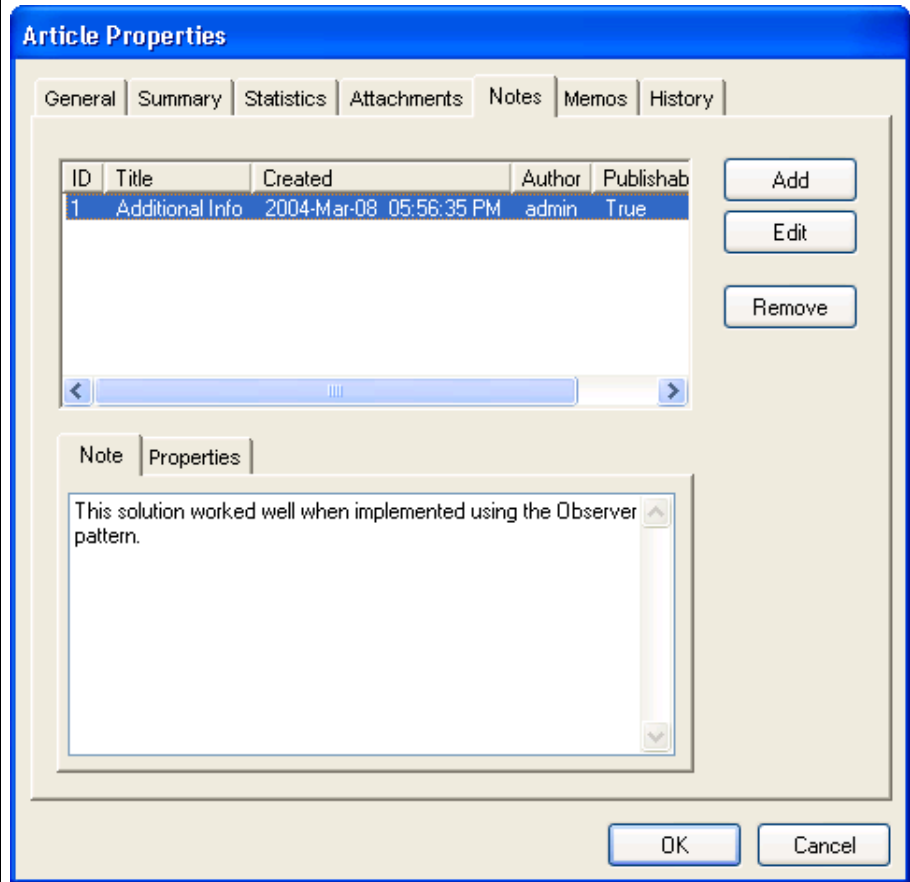
**Manage Notes**

To add a note using the Article Editor:

Step	Action
1	Create a new article with the Advanced Editor or open an existing article.
2	From the Article toolbar, choose the <b>Properties</b> button. You will now see the properties dialog.

3

Click on the **Notes** tab. You may now Add, Edit or Remove notes as needed.



4

When you are finished managing the article's notes, press the **OK** button to return to editing the article body.

---

**View History**

To view an article's history using the Article Editor:

<b>Step</b>	<b>Action</b>
1	Open an existing article.
2	From the Article toolbar, choose the <b>Properties</b> button. You will now see the properties dialog.
3	Click on the <b>History</b> tab to review the modification history.
4	When you are finished viewing the article history, press the <b>OK</b> button to return to editing the article body.

---

**Lock Article**

Placing a lock on an article allows you to restrict access to the article until you release the lock. Accounts with the proper administrative privileges can still maintain locked articles.

To lock or unlock an article using the Article Editor:

<b>Step</b>	<b>Action</b>
1	Create a new article with the Advanced Editor or open an existing article.
2	From the Article toolbar, choose the <b>Properties</b> button. You will now see the properties dialog.
3	Select the <b>General</b> tab.
4	Select (lock) or deselect (unlock) the field <b>Do not allow others to update this article</b> .
5	When you are finished changing the lock status, press the <b>OK</b> button to return to editing the article body.

---

## Using the Article Editor

### Introduction

The backbone of the Knowledge Explorer is the powerful Article Editor. The Editor emulates much the functionality included in a number of standalone commercial editing products. It is your main tool for creating and modifying articles. This section is a quick reference to common editing tasks grouped by category. This section describes how to perform multiple tasks using the Article Editor.

**Customize Display** To toggle the visibility of multiple editor components:

Step	Action
1	Create a new article with the Advanced Editor or open an existing article.
2	Choose menu <b>View</b> and then choose one of the following: <ul style="list-style-type: none"> <li>• <b>Paragraph Bar:</b> Toggles the formatting toolbar.</li> <li>• <b>Status Bar:</b> Toggles the status bar.</li> <li>• <b>Ruler:</b> Toggles the ruler.</li> </ul>

### Change Page Layout

To change the article page layout:

Step	Action
1	Create a new article with the Advanced Editor or open an existing article.
2	Choose menu <b>View</b> and then choose either <b>Normal</b> or <b>Page Layout</b> .

### Page Layout Styles

Style	Description
Normal	Article body is displayed in continuous format with no page separators.
Page Layout	Article body is displayed similarly to a print preview mode. However, full editing capability and header/footer maintenance is enabled. The editing window is centered.

### Find Text

To search for a text phrase within an article perform the following.

**NOTE:** To repeat your last “find” operation, either (1) choose menu **Edit | Find** or (2) press the **F3** key.

Step	Action
------	--------

1	Create a new article with the Advanced Editor or open an existing article.
2	Invoke the Find Text dialog by (1) choosing menu <b>Edit   Find</b> or (2) press the <b>Find</b> button (binoculars).

**Replace Text**

To replace a text phrase within an article perform the following.

Step	Action
1	Create a new article with the Advanced Editor or open an existing article.
2	Invoke the <b>Replace Text</b> dialog by (1) choosing menu <b>Edit   Replace</b> .

**Change Header and Footer**

To change an article's header or footer perform the following.

**NOTE:** The header and footer information is not displayed in **Normal** page layout mode.

Step	Action
1	Create a new article with the Advanced Editor or open an existing article.
2	Choose menu <b>View   Header and Footer</b> . You will be placed into the header section for editing. Your main body text will be grayed out.
3	To switch to the footer, choose the <b>Switch</b> toolbar button.
4	To close the header/footer view, either click on the article body text or press the <b>s</b> toolbar button.

**Change Page Zoom**

To display the magnification of the article body perform the following.

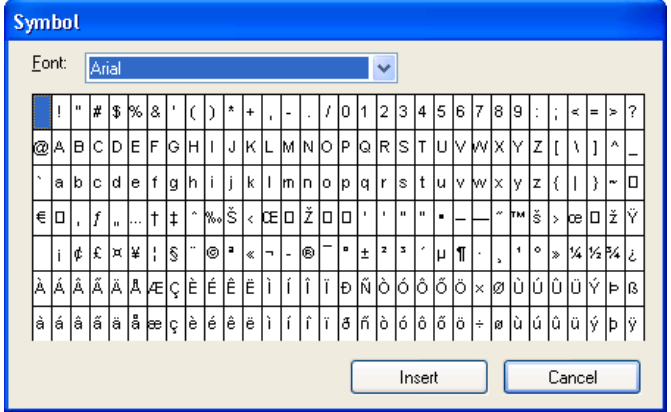
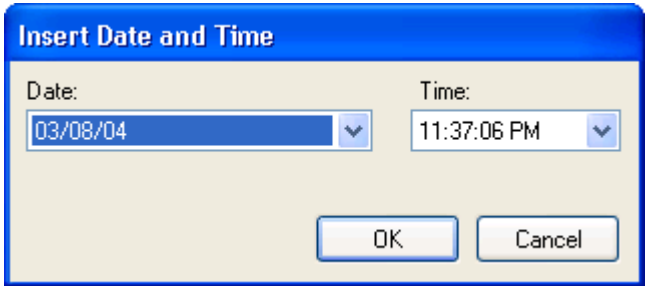
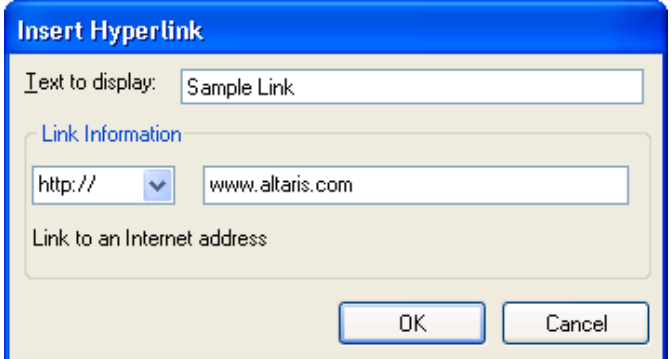
**NOTE:** The zoom has no effect on an article during printing.

Step	Action
1	Create a new article with the Advanced Editor or open an existing article.
2	Select the desired <b>Zoom</b> value from the toolbar drop-down box.

**Insert Operations**

A number of actions can be performed from within the Article Editor's **Insert** menu. A brief description of these actions follows.

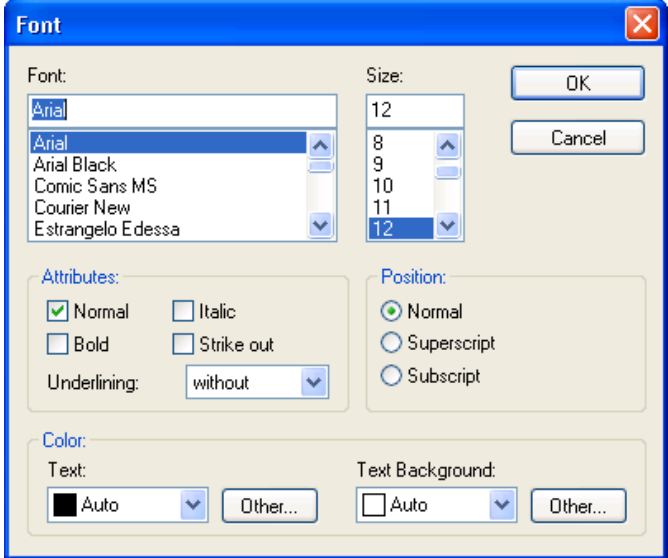
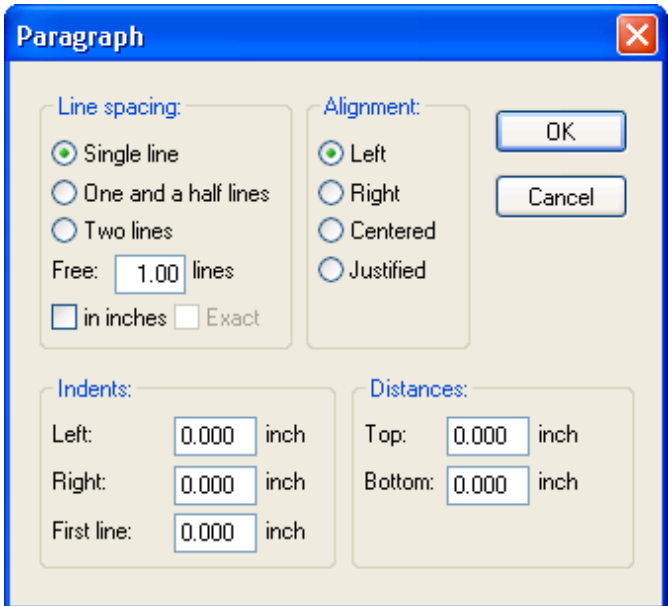
Task	Comments
Insert Page Break	Inserts a page break at the current cursor position.

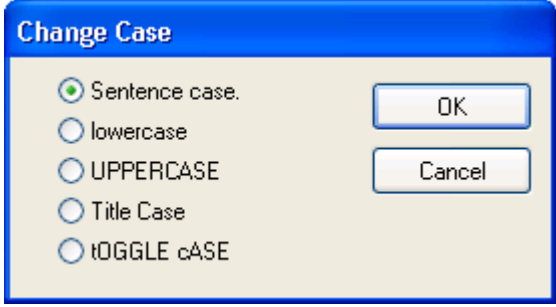
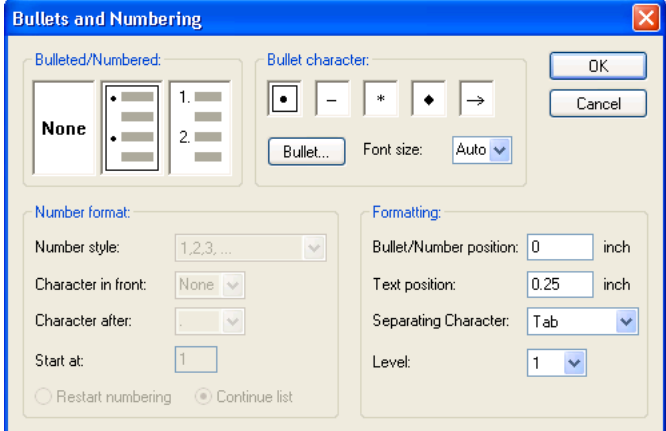
<p>Insert Symbol</p>	<p>Inserts a special symbol at the current cursor position.</p> 
<p>Insert File</p>	<p>Inserts the contents of an existing file at the current position using one of the supported file formats.</p>
<p>Insert Date and Time</p>	<p>Inserts either the current date, time or both at the current cursor position.</p> 
<p>Insert Hyperlink</p>	<p>Inserts a hyperlink and link text at the current cursor position. Supported hyperlink types include HTTP, FILE, FTP and MAILTO.</p> 

**Formatting Operations**

A number of formatting actions can be performed from within the Article Editor's **Format** menu. A brief description of these actions follows.

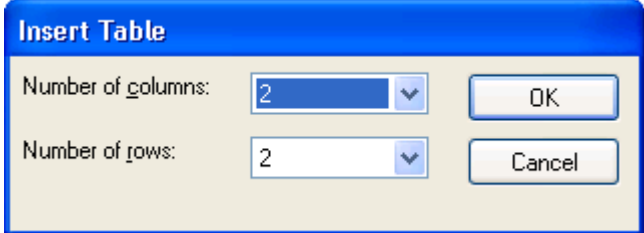
Task	Comments
------	----------

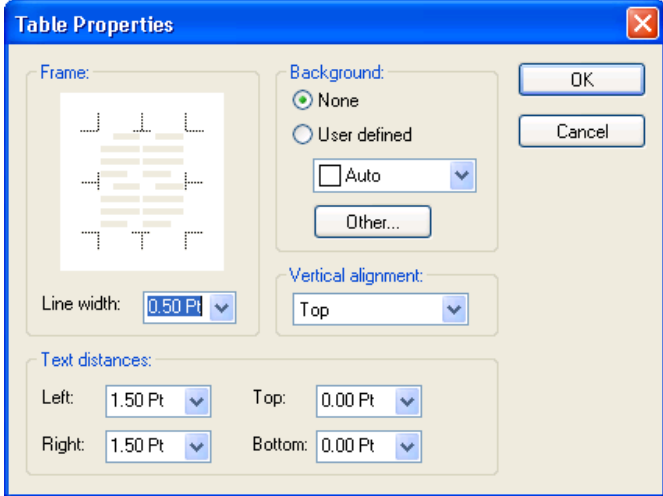
<p>Format Font</p>	<p>Sets the font of the selected text.</p> 
<p>Format Paragraph</p>	<p>Sets the attributes of the selected paragraph(s).</p> 
<p>Format Font Color</p>	<p>Sets the color of the selected text.</p>
<p>Format Background Color</p>	<p>Sets the background color of the selected text.</p>

Change Case	Sets the case style of the selected text. 
Format Bullets and Numbering	Sets the list style attributes of the selected text. Further options are available under this menu. 

**Table Operations**

A number of table actions can be performed from within the Article Editor's **Table** menu. A brief description of these actions follows.

Task	Comments
Insert Table	Inserts a new table at the cursor position. 

<p>Table Properties</p>	<p>Sets attributes of the selected table.</p> 
<p>Insert Row/Column</p>	<p>Inserts a new row or column into the selected table.</p>
<p>Select Table/Row/Column</p>	<p>Selects the entire table, row or column of the current table.</p>
<p>Delete Table/Row/Column</p>	<p>Remove the entire table, row or column of the current table.</p>

## Finding Articles

### Introduction

The Knowledge Explorer provides an extensive full-text search engine that is available through the **Find Pane** and the **Advanced Find** dialog. This section explains how to use both of these tools to locate articles in your project.

### Find Pane

The **Find Pane** visibility can be toggled off from the **Tools | Find Pane** menu. The Find Pane is enabled by default and offers the following components.



Item	Comments
Look For	Specify the text that you would like to search for.
Search In	You may choose to look within the current folder, a different folder or all folders.
Find Now	Initiates the search based on your criteria.
Clear	Clears the current search results and returns to the previous results list.
Options	If multiple search words are included and separated by commas, you may match any of the words or all of the words. You may also invoke the <b>Advanced Find</b> dialog.

### Advanced Find

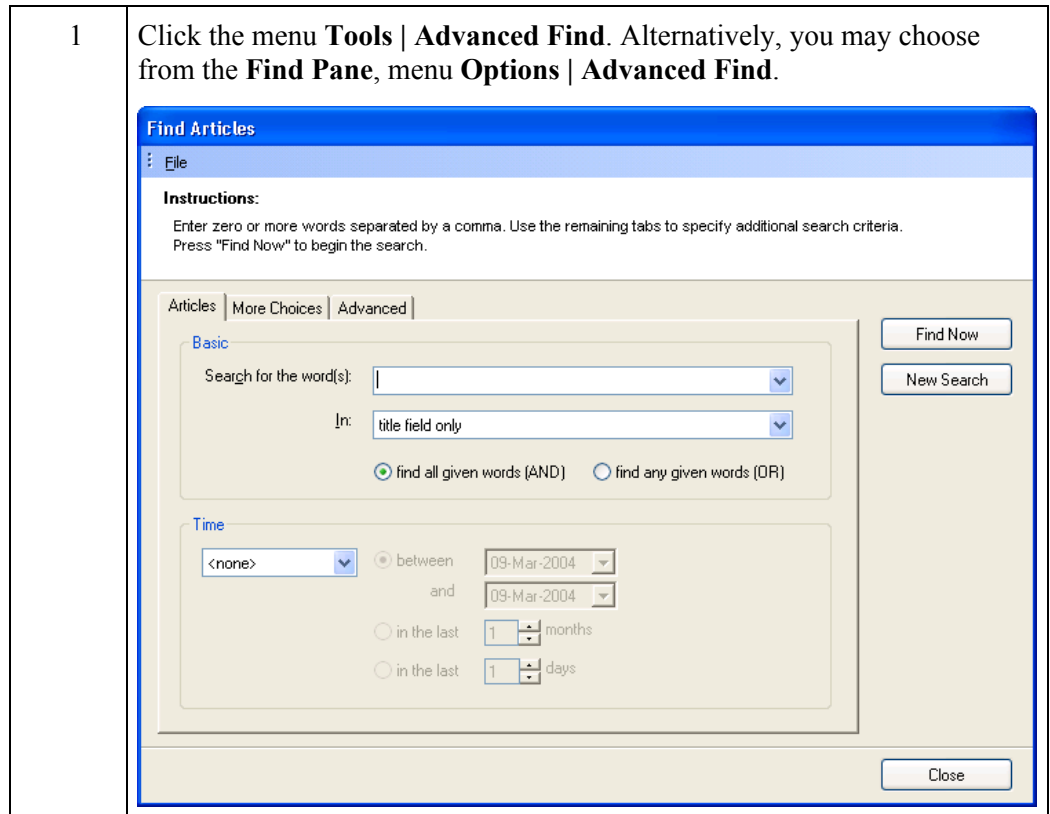
The **Advanced Find** dialog provides more flexibility in describing your search criteria. Additionally, you may save and load search queries using this dialog.

#### Getting Started

Step	Action
------	--------

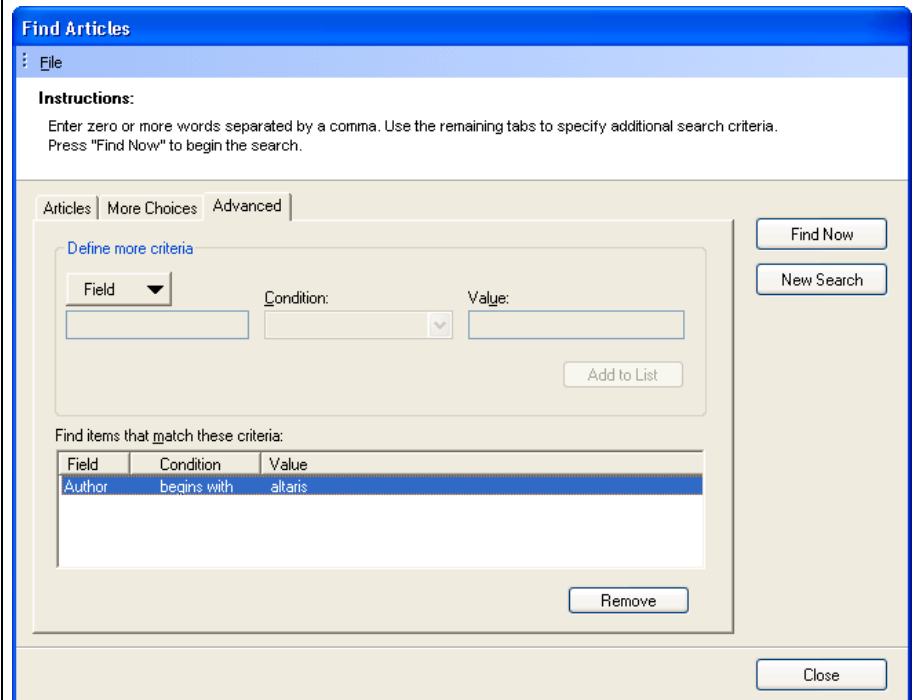
1

Click the menu **Tools | Advanced Find**. Alternatively, you may choose from the **Find Pane**, menu **Options | Advanced Find**.



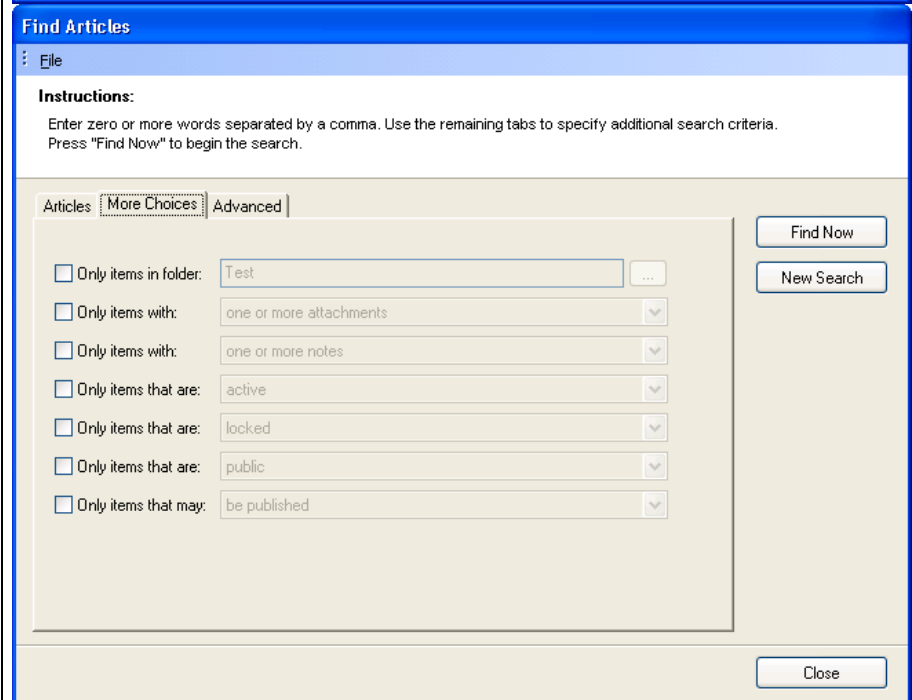
2

Navigate through the tabs to configure your search criteria.



3

Press **Find Now** to display the matching articles in the **Results Pane**.



### Save Search Criteria

The **Advanced Find** dialog provides the ability to save search criteria either as a local file on your computer (with a \*.kss file extension) or within the database as a search filter.

If you save the search to the database, it will be available to all project users and appear in the **Search Filters** folder. Additionally, filters saved in the database may be managed using the **Filter Manager**.

Follow these steps to save your search criteria.

Step	Action
1	Start the <b>Advanced Find</b> dialog.
2	After you have configured your search criteria, choose either menu <b>File   Save to File</b> or <b>File   Save to Database</b> .
3	You will be prompted for either a file name or search filter name and the criteria will be saved in the location that you selected.

### Load Search Criteria

The **Advanced Find** dialog provides the ability to load search criteria from a True-Knowledge Saved Search (\*.kss) file.

**NOTE:** Search filters that are stored in the database may be managed using the **Filter Manager**.

Follow these steps to load your search criteria from a saved search file.

Step	Action
1	Start the <b>Advanced Find</b> dialog.
2	Choose menu <b>File   Open Search</b> to display the <b>Open</b> dialog.
3	Specify the name and location of a True-Knowledge Saved Search (*.kss) file and press <b>Open</b> to load the search criteria from the file.

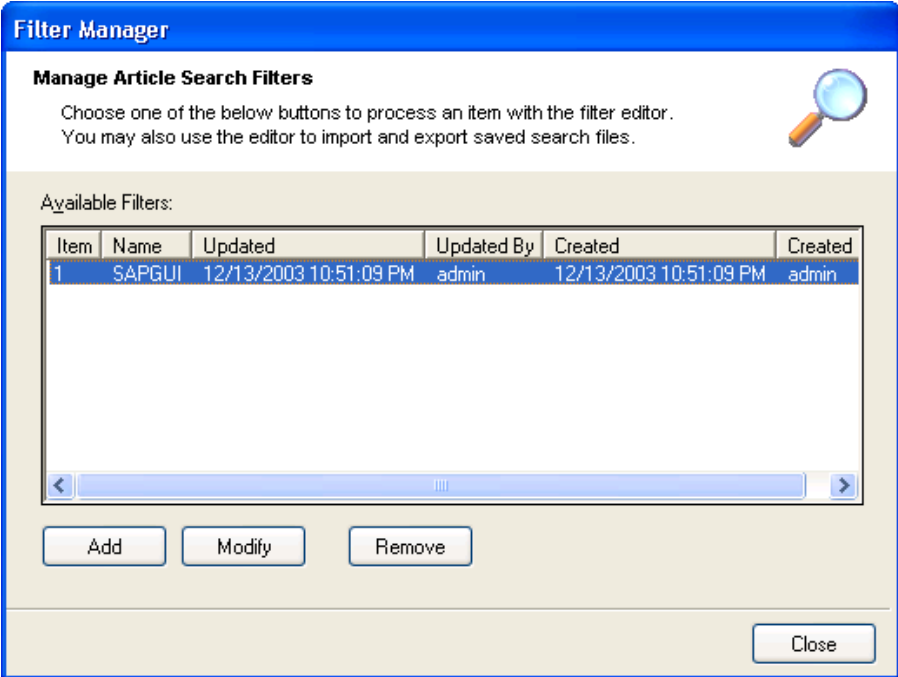
# Using the Filter Manager

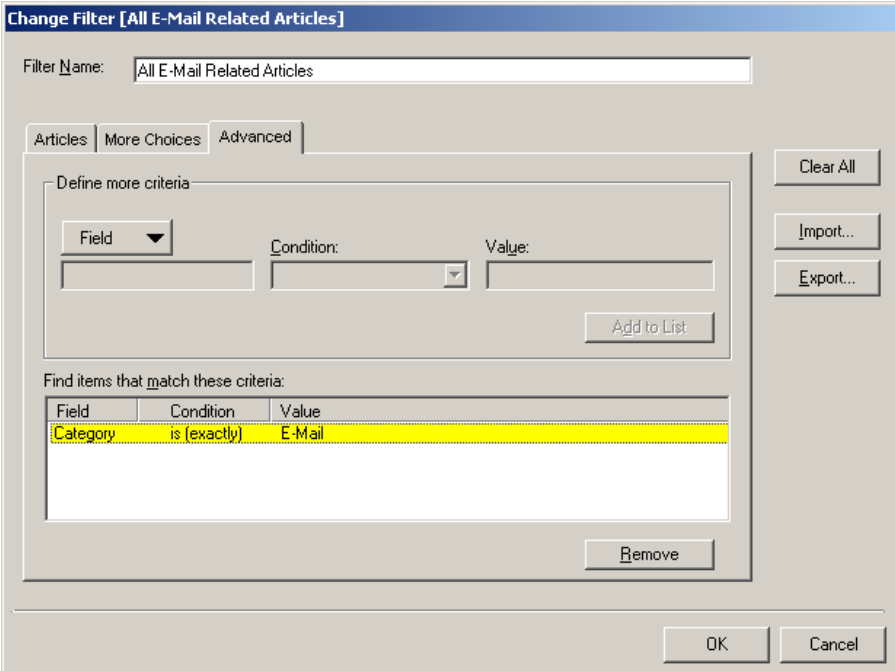
## Introduction

A search filter is a set of search criteria stored within the database. Search filters are handy for common queries such “*show all articles containing attachments*”. This section explains how to manage search filters using the **Filter Manager**.

## Getting Started

Follow these steps to add a new Search Filter using the **Filter Manager**.

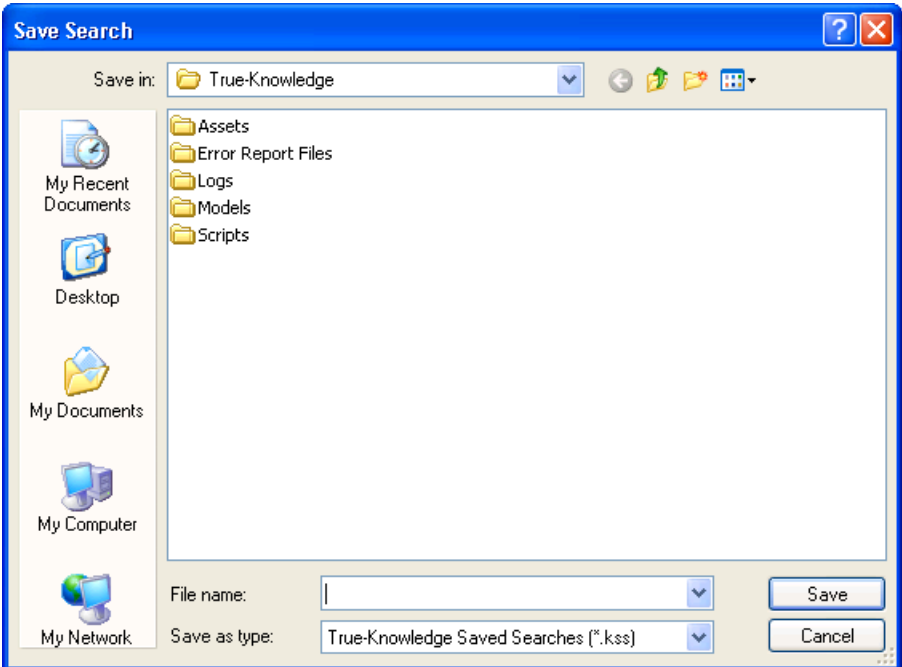
Step	Action
1	<p>Choose menu <b>Tools   Filter Manager</b>.</p> 

<p>2</p>	<p>To add or modify search filter, select the respective button to launch the <b>Filter Editor</b>.</p> 
<p>3</p>	<p>Specify a filter name and press <b>OK</b> to save your search filter within the database.</p>

**Export Search Filter**

Follow these steps to export a search filter to an external file using the **Filter Manager**.

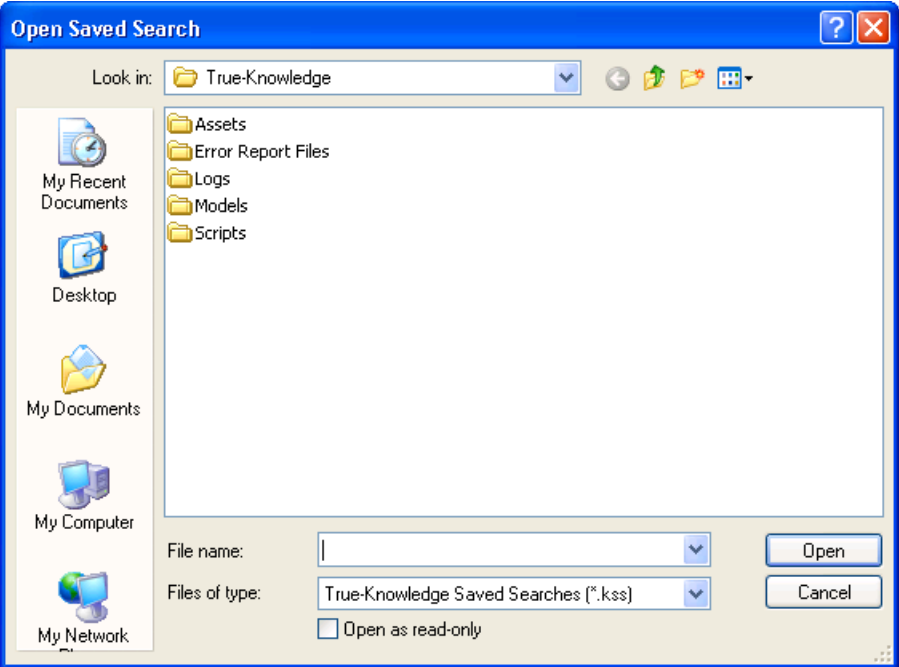
Step	Action
1	Choose menu <b>Tools   Filter Manager</b> .
2	To add or modify search filter, select the respective button to launch the <b>Filter Editor</b> .
3	Press the <b>Export</b> button.

<p>4</p>	<p>From the <b>Save Search</b> dialog, specify a target location and file name. Press <b>Save</b> to save the criteria to a True-Knowledge Saved Search (*.kss) file.</p> 
<p>5</p>	<p>The output file can now be used by the <b>Filter Manager</b> or <b>Advanced Find</b> tools.</p>

**Import Search Filter**

Follow these steps to import a search filter from an external file using the **Filter Manager**.

Step	Action
6	Choose menu <b>Tools   Filter Manager</b> .
7	To add or modify search filter, select the respective button to launch the <b>Filter Editor</b> .
8	Press the <b>Import</b> button.

9	<p>From the <b>Open Saved Search</b> dialog, specify a source location and file name. Press <b>Open</b> to load the criteria from a True-Knowledge Saved Search (*.kss) file.</p>  <p>The screenshot shows a Windows-style dialog box titled "Open Saved Search". At the top, there is a "Look in:" field with a dropdown menu showing "True-Knowledge". Below this is a list of folders: "Assets", "Error Report Files", "Logs", "Models", and "Scripts". On the left side, there are navigation icons for "My Recent Documents", "Desktop", "My Documents", "My Computer", and "My Network". At the bottom, there is a "File name:" field, a "Files of type:" dropdown menu set to "True-Knowledge Saved Searches (*.kss)", and an "Open as read-only" checkbox. There are "Open" and "Cancel" buttons on the right side.</p>
10	<p>The output file will be loaded and the dialog will be updated with the search criteria.</p>

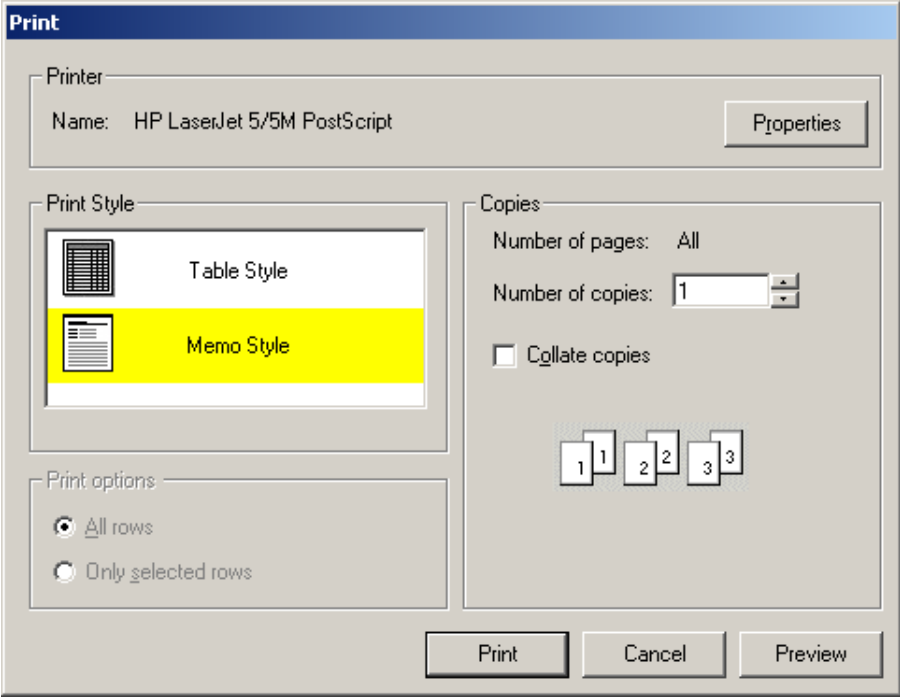
# Printing

## Introduction

This section explains how to print articles and article results lists.

## Print Article

Follow these steps to print an article from the Knowledge Explorer Project Folders workspace.

Step	Action
1	Generate an article results list either by select a folder or running a search query or filter.
2	From the Results Pane, select an article.
3	Choose menu <b>Article   Print</b> to display the <b>Print</b> dialog. 
4	Choose the <b>Memo</b> style, select and configure your target printer. Then press <b>Print</b> to print the article.

## Print Preview

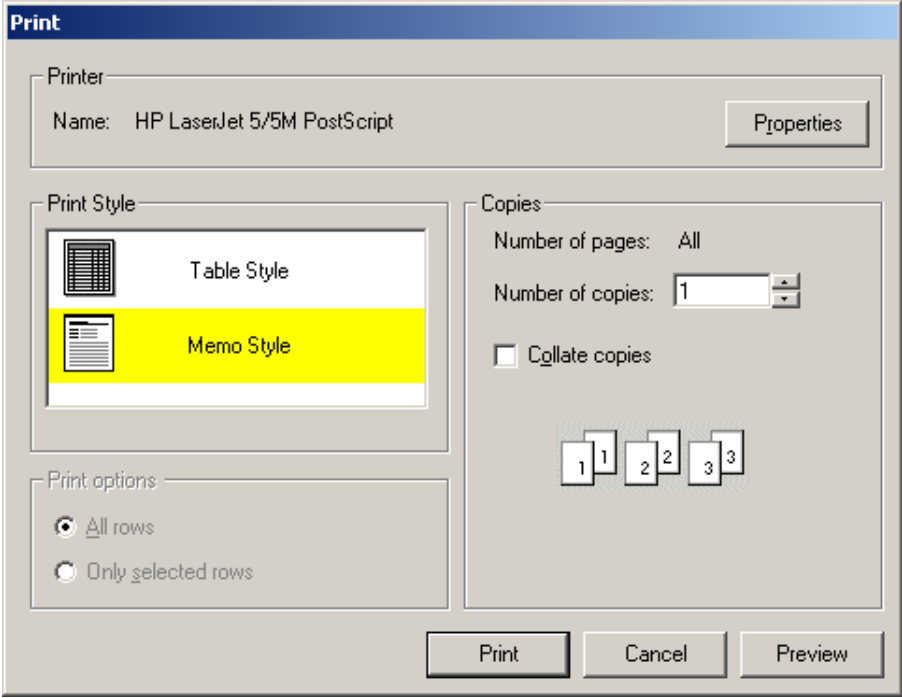
Follow these steps to display an article in print preview mode from the Knowledge Explorer Project Folders workspace.

Step	Action
1	Generate an article results list either by select a folder or running a search query or filter.
2	From the Results Pane, select an article.

3	Choose menu <b>Article</b>   <b>Print Preview</b> to display the <b>Print Preview</b> dialog.
---	---

**Print Results List**

Follow these steps to print the article list within the Results Pane of the Knowledge Explorer Project Folders workspace.

Step	Action
1	Generate an article results list either by select a folder or running a search query or filter.
2	From the Results Pane, select an article.
3	<p>Choose menu <b>Article</b>   <b>Print</b> to display the <b>Print</b> dialog.</p> 
4	Choose the <b>Table</b> style, select and configure your target printer. Then press <b>Print</b> to print the article list.

# Sending Mail

## Introduction

This section explains how to send articles attached to mail messages from the Knowledge Explorer.

## Set Mail Format Options

Follow these steps to configure your default mail message type and settings.

Step	Action
1	Choose menu <b>Tools   Options</b> .
2	Select the <b>Mail</b> category.
3	Select the desired mail option and enter the required values.
4	Press <b>OK</b> to save your changes.

## Standard Mail (MAPI)

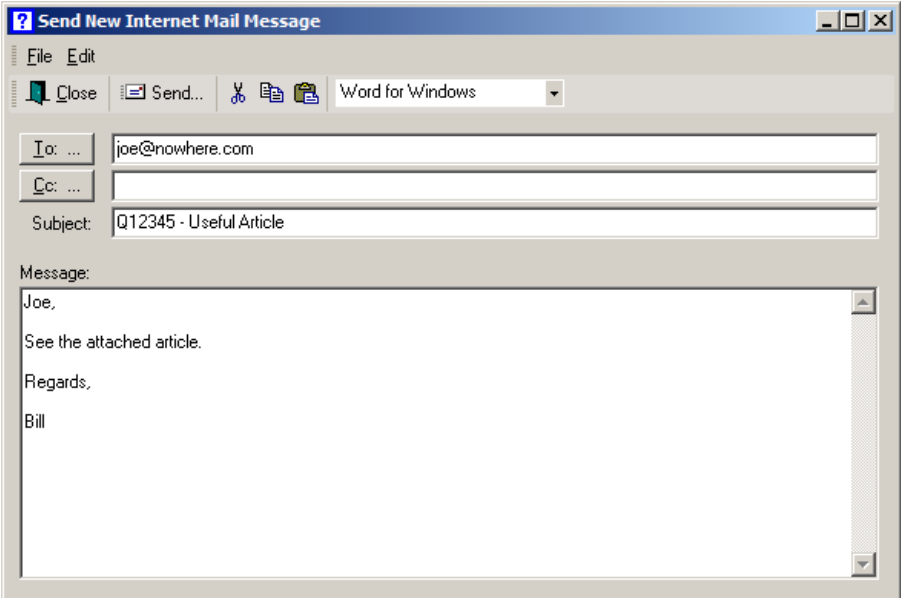
Follow these steps to create a new Microsoft MAPI (e.g. Outlook) mail message with an attached article.

Step	Action
1	Generate an article results list either by select a folder or running a search query or filter.
2	From the results pane, select an article.
3	Choose menu <b>Article   Send</b> to display the Send Mail dialog.
4	Enter your addressing information, a message body and attachment style. Then press <b>Send</b> to send the mail message.

The screenshot shows a 'Send Mail' dialog box with a menu bar (File, Edit, Tools) and a toolbar (Close, Send..., Check Names, Cut, Copy, Paste, Word for Windows). The 'To:' field is filled with 'joe@nowhere.com', 'Cc:' is empty, and 'Subject' is '0139467 - SAPDBA: AUTOEXTEND and RESIZE'. The message body contains: 'Joe, See the attached article. Regards, Bill'.

**Internet Mail  
(SMTP)**

Follow these steps to create a new Internet mail message with an attached article.

Step	Action
1	Generate an article results list either by select a folder or running a search query or filter.
2	From the results pane, select an article.
3	Choose menu <b>Article</b>   <b>Send</b> to display the Send Mail dialog.
4	<p>Enter your addressing information, a message body and attachment style. Then press <b>Send</b> to send the mail message.</p> 

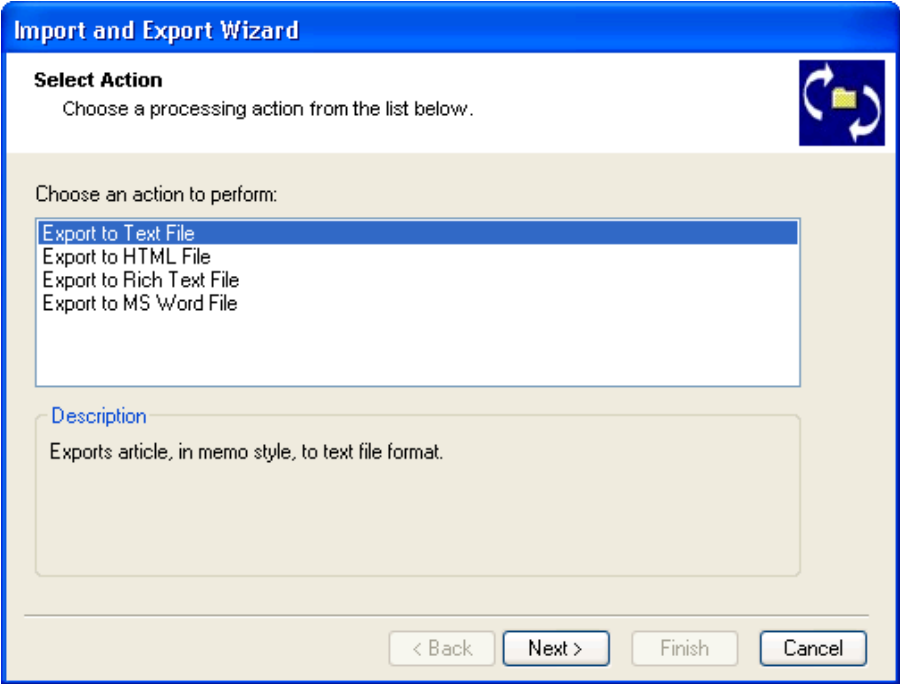
## Import and Export Articles

### Introduction

This section explains how to get started with the **Import and Export Wizard**.

### Export Article

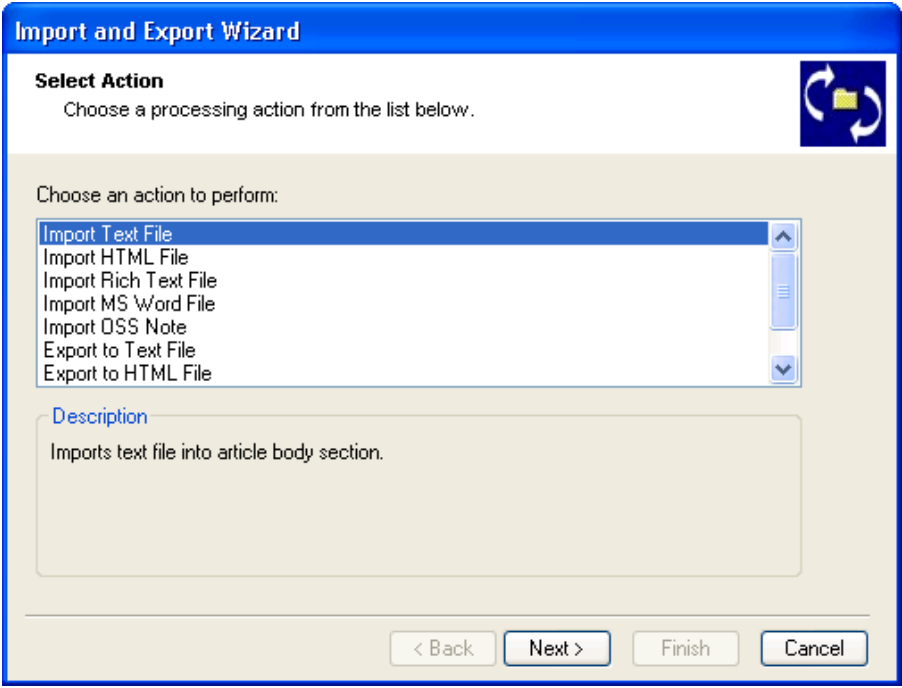
Follow these steps to export an article using the **Import and Export Wizard**.

Step	Action
1	Generate an article results list either by select a folder or running a search query or filter.
2	From the results pane, select the article.
3	Choose menu <b>Article   Export</b> to display the <b>Import and Export Wizard</b> dialog. 
4	Pick the desired export file type and press <b>Next</b> .
5	Select the target export file path and press <b>Finish</b> . The article body will be exported in the selected format.

### Import Article

Follow these steps to export an article using the **Import and Export Wizard**.

Step	Action
1	Either create a new article or generate an article results list either by select a folder or running a search query or filter.
2	From the results pane, open the article.

<p>3</p>	<p>Choose menu <b>File   Import and Export</b> to display the <b>Import and Export Wizard</b> dialog.</p> 
<p>4</p>	<p>Pick the desired import file type and press <b>Next</b>.</p>
<p>5</p>	<p>Select the source import file path and press <b>Finish</b>. The article body will be replaced with the contents of the source file.</p>

## **PART 4 – MANAGEMENT CONSOLE**

## Management Console – Getting Started

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### Introduction

The **Management Console** is your primary tool for managing True-Knowledge databases. The Management Console is intended for True-Knowledge system administrators.

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### Requirements

Before you can use the Management Console, you must have:

- A valid connection profile that connects to an existing True-Knowledge database;
- A valid user account and project within the True-Knowledge database.

**NOTE:** The Database Wizard ensures that both of these requirements are met for new databases.

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### Security Requirements

The availability and functionality of some operations may be determined by a user's security privileges.

To use the Management Console, you must use an account that (1) is designated as an administrator or (2) has the administrative privilege.

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### SUPERUSER Account

All True-Knowledge databases are provided with an administrative account called **admin** with no password. If this is your first time configuring a database, you may use this account. It is recommended that you immediately assign a password to this administrative account to reduce the security risk.

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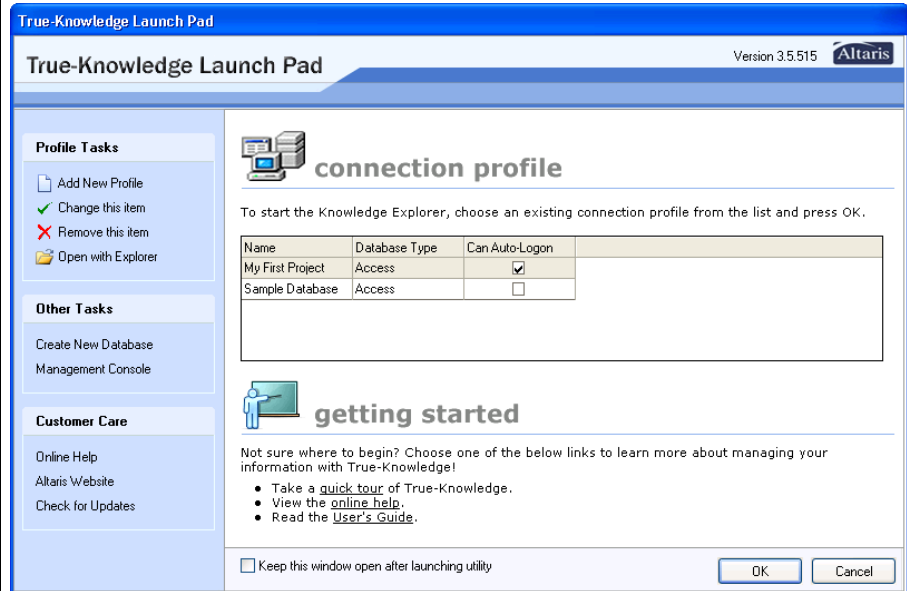
### Starting the Management Console

Follow these steps to start and connect to the Management Console:

Step	Action

1

Start the **Launch Pad**. Then click on **Management Console** under the **Other Tasks** section.

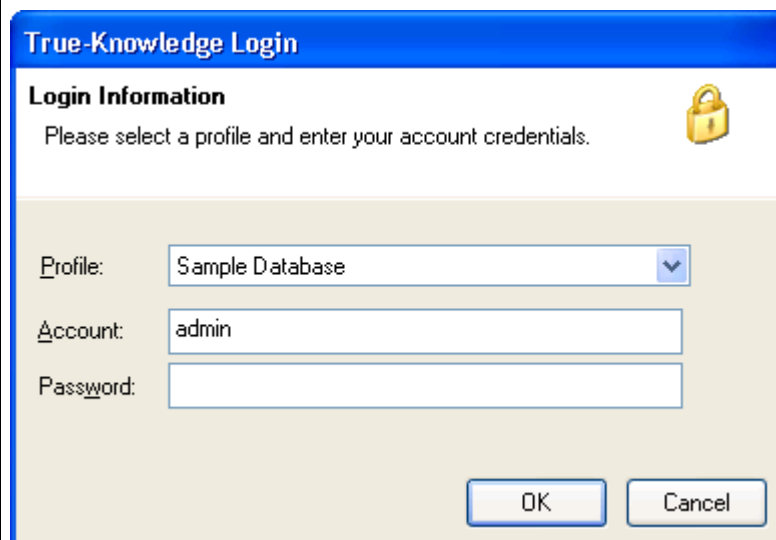


**MANUAL START:** You can manually launch the Management Console from the True-Knowledge program group. Alternatively, you can execute <installation path>\kconsole.exe.

**KNOWLEDGE EXPLORER:** To display the Management Console from the Knowledge Explorer, press the **Manage Database** toolbar button.

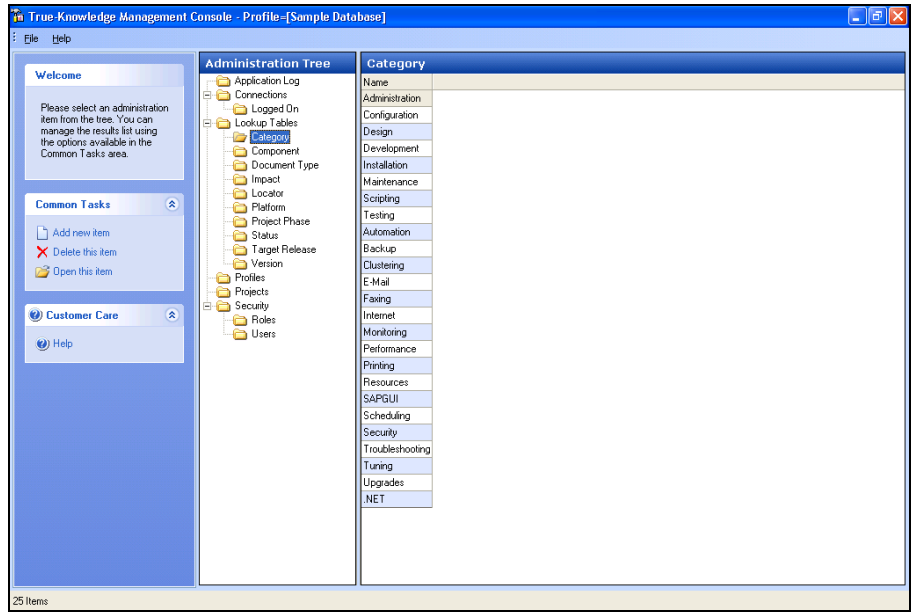
2

If prompted for your logon credentials select an existing profile and provide the appropriate logon information.



3

Once connected, you have the Management Console workspace as seen below. You are now connected and may continue managing your database.



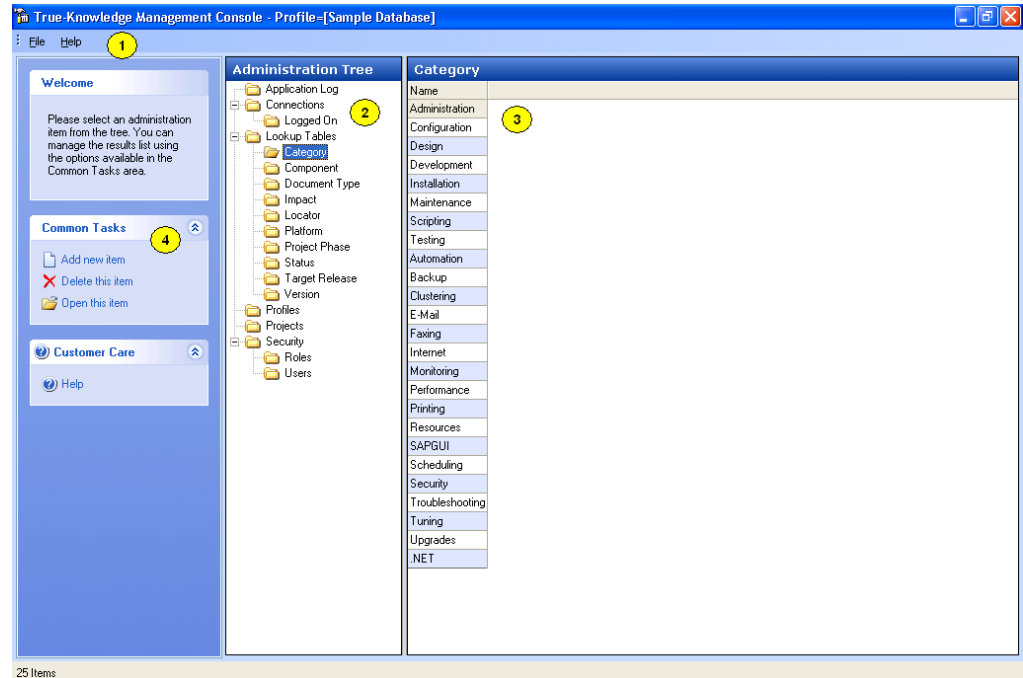
# Management Console User Interface

## Introduction

This chapter will introduce you to the various components of the True-Knowledge Management Console user interface as well as techniques for customizing your True-Knowledge databases.

## General Layout

The Management Console displays a menu bar along the top of the screen with a variety of menu titles. Selecting a command from one of these menus either performs an action or displays a submenu or dialog.



Section	Description
1	<b>Menu:</b> Close application or open application help.
2	<b>Administration Tree:</b> Contains management components organized into a tree.
3	<b>Results Pane:</b> All search results will be displayed in this pane.
4	<b>Task Pane:</b> Contains tasks depending upon the selected item within the Administration Tree.

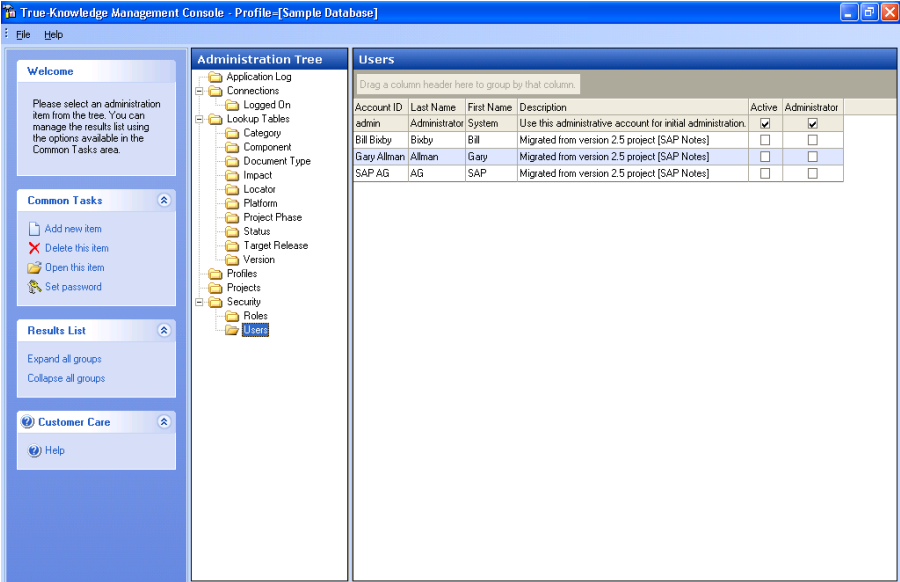
# Managing Users

## Introduction

This section explains how to manage user accounts from the Management Console.

## Add User

To create a new True-Knowledge user account:

Step	Action																														
1	Start the Management Console																														
2	<p>Select the <b>Users</b> folder from the Administration Tree.</p>  <p>The screenshot shows the True-Knowledge Management Console interface. On the left is a 'Common Tasks' panel with options like 'Add new item', 'Delete this item', 'Open this item', and 'Set password'. In the center is the 'Administration Tree' with 'Users' highlighted. On the right is a 'Users' table with the following data:</p> <table border="1"> <thead> <tr> <th>Account ID</th> <th>Last Name</th> <th>First Name</th> <th>Description</th> <th>Active</th> <th>Administrator</th> </tr> </thead> <tbody> <tr> <td>admin</td> <td>Administrator</td> <td>System</td> <td>Use this administrative account for initial administration.</td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Bill Bixby</td> <td>Bixby</td> <td>Bill</td> <td>Migrated from version 2.5 project [SAP Notes]</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Gary Allman</td> <td>Allman</td> <td>Gary</td> <td>Migrated from version 2.5 project [SAP Notes]</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>SAP AG</td> <td>AG</td> <td>SAP</td> <td>Migrated from version 2.5 project [SAP Notes]</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Account ID	Last Name	First Name	Description	Active	Administrator	admin	Administrator	System	Use this administrative account for initial administration.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bill Bixby	Bixby	Bill	Migrated from version 2.5 project [SAP Notes]	<input type="checkbox"/>	<input type="checkbox"/>	Gary Allman	Allman	Gary	Migrated from version 2.5 project [SAP Notes]	<input type="checkbox"/>	<input type="checkbox"/>	SAP AG	AG	SAP	Migrated from version 2.5 project [SAP Notes]	<input type="checkbox"/>	<input type="checkbox"/>
Account ID	Last Name	First Name	Description	Active	Administrator																										
admin	Administrator	System	Use this administrative account for initial administration.	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>																										
Bill Bixby	Bixby	Bill	Migrated from version 2.5 project [SAP Notes]	<input type="checkbox"/>	<input type="checkbox"/>																										
Gary Allman	Allman	Gary	Migrated from version 2.5 project [SAP Notes]	<input type="checkbox"/>	<input type="checkbox"/>																										
SAP AG	AG	SAP	Migrated from version 2.5 project [SAP Notes]	<input type="checkbox"/>	<input type="checkbox"/>																										
3	Choose the <b>Add new item</b> task from the <b>Common Tasks</b> section.																														

4

Fill in the user information and press **OK** to save the user. You should now see the new user account in the list of available users.

**Active User:** If this property is not selected, this user will NOT be able to logon to either the Management Console or the Knowledge Explorer.

**System Administrator:** This property is the equivalent of a SUPERUSER account. Use this property sparingly to reduce security risk to your data. Almost all Console and Explorer functions can be secured through role privileges. So you can still create administrators without giving them this property.

**Change User**

Follow these steps to change an existing user:

Step	Action
1	Start the Management Console
2	Navigate to the <b>Users</b> folder and the list of available accounts will be listed in the results pane. You may double-click on an account to open the property page. Alternatively, choose the <b>Open this item</b> task from the <b>Common Tasks</b> section.

3 Modify the user information as desired and press **OK** to save your changes.

**Active User:** If this property is not selected, this user will NOT be able to logon to either the Management Console or the Knowledge Explorer.

**System Administrator:** This property is the equivalent of a SUPERUSER account. Use this property sparingly to reduce security risk to your data. Almost all Console and Explorer functions can be secured through role privileges. So you can still create administrators without giving them this property.

**Projects Tab:** You can manage the projects a user belongs to by visiting the [Maintaining Your Project Team](#) topic.

**Remove User**

Follow these steps to remove an existing user:

Step	Action
1	Start the Management Console
2	Navigate to the <b>Users</b> folder and the list of available accounts will be listed in the results pane. Select a user account in the results pane and then choose the <b>Delete this item</b> task from the <b>Common Tasks</b> section.

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3	Confirm your action when prompted, by pressing <b>OK</b> . This user account will then be removed from the database.
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### Change User Password

Follow these steps to set or change the password for an existing user:

Step	Action
1	Start the Management Console
2	Navigate to the <b>Users</b> folder and the list of available accounts will be listed in the results pane. Select a user account in the results pane and then choose the <b>Set password</b> task from the <b>Common Tasks</b> section.
3	Enter the new password twice and press <b>OK</b> to save the information. <b>NOTE:</b> Users will need to restart the Management Console or Knowledge Explorer to use the new password.

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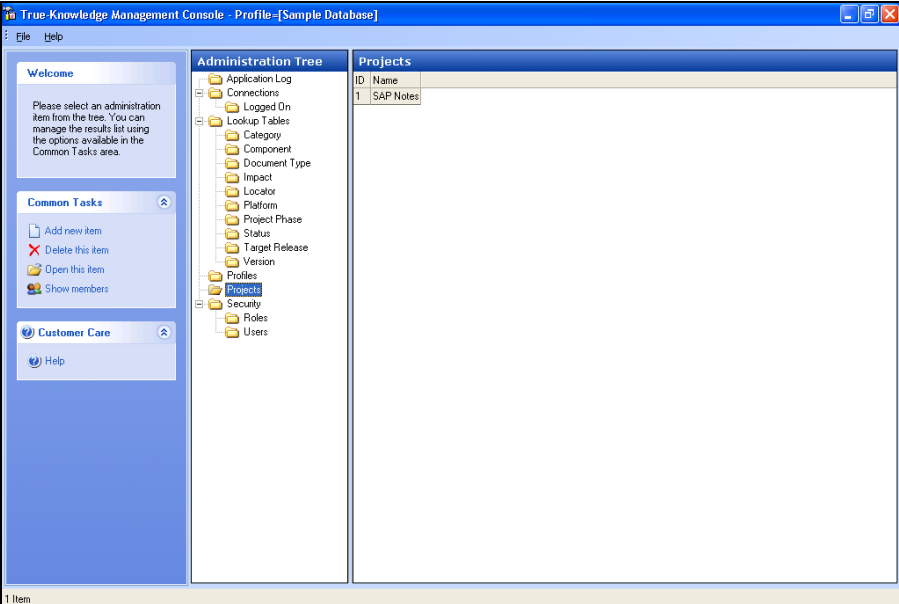
# Managing Projects

## Introduction

This section explains how to manage True-Knowledge projects using the Management Console.

## Add Project

Follow these steps to add a new project.

Step	Action
	Start the Management Console
	<p>Select the <b>Projects</b> folder from the Administration Tree.</p> 
	Choose the <b>Add new item</b> task from the <b>Common Tasks</b> section.

Fill in the project information and press **OK** to save your project. You should now see the new project in the list of available projects.

**Change Project**

Follow these steps to change an existing project.

Step	Action
1	Start the Management Console
2	Select the <b>Projects</b> folder from the Administration Tree and the list of available projects will be displayed in the results pane. Select a project from the list.
3	Choose the <b>Open this item</b> task from the <b>Common Tasks</b> section.
4	Fill in the project information and press <b>OK</b> to save your changes.

**Remove Project**

Follow these steps to remove an existing project.

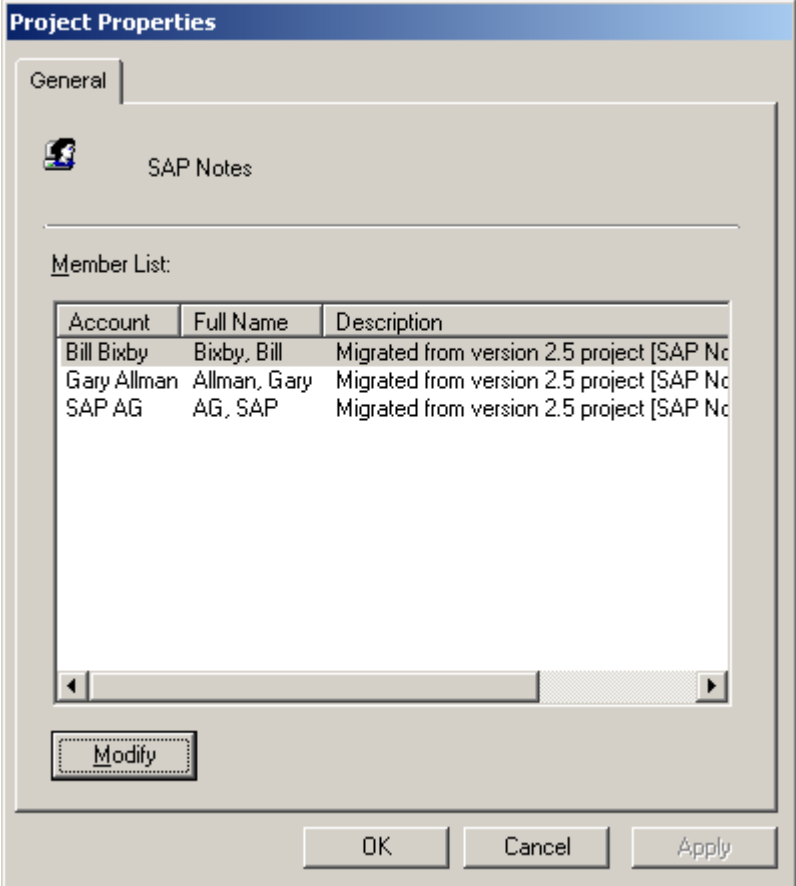
Step	Action
1	Start the Management Console

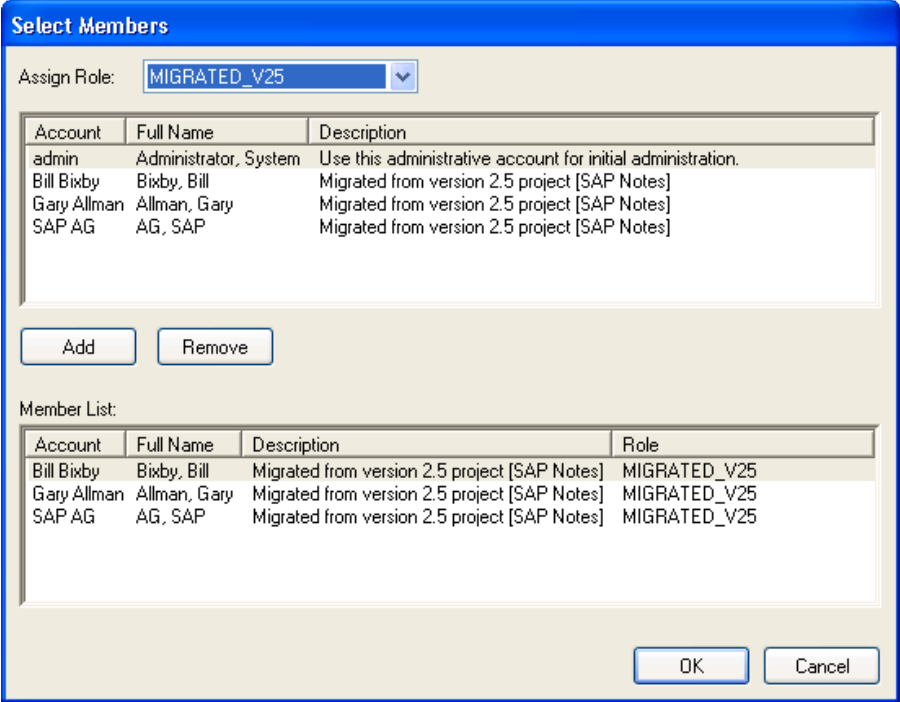
2	Select the <b>Projects</b> folder from the Administration Tree and the list of available projects will be displayed in the results pane. Select a project from the list.
3	Choose the <b>Delete this item</b> task from the <b>Common Tasks</b> section.
4	Confirm your action by pressing <b>Yes</b> at the confirmation prompt. Your project and all related data will be removed from the database.  <b>WARNING:</b> Removing a project <u>removes all project-specific data</u> (e.g. articles, project team, etc) from the database. Be very careful when using the option. It is recommended that you backup your data before attempting this operation.

### Maintain Project Members

Follow these steps to remove an existing project.

Step	Action
1	Start the Management Console
2	Select the <b>Projects</b> folder from the Administration Tree and the list of available projects will be displayed in the results pane. Select a project from the list.

3	<p>Choose the <b>Show Members</b> task from the <b>Common Tasks</b> section.</p>  <p>The screenshot shows a 'Project Properties' dialog box with a 'General' tab. It features a 'SAP Notes' icon and a 'Member List' table. The table has three columns: 'Account', 'Full Name', and 'Description'. The entries are:</p> <table border="1" data-bbox="626 562 1300 961"><thead><tr><th>Account</th><th>Full Name</th><th>Description</th></tr></thead><tbody><tr><td>Bill Bixby</td><td>Bixby, Bill</td><td>Migrated from version 2.5 project [SAP No</td></tr><tr><td>Gary Allman</td><td>Allman, Gary</td><td>Migrated from version 2.5 project [SAP No</td></tr><tr><td>SAP AG</td><td>AG, SAP</td><td>Migrated from version 2.5 project [SAP No</td></tr></tbody></table> <p>Below the table is a 'Modify' button, and at the bottom of the dialog are 'OK', 'Cancel', and 'Apply' buttons.</p>	Account	Full Name	Description	Bill Bixby	Bixby, Bill	Migrated from version 2.5 project [SAP No	Gary Allman	Allman, Gary	Migrated from version 2.5 project [SAP No	SAP AG	AG, SAP	Migrated from version 2.5 project [SAP No
Account	Full Name	Description											
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Gary Allman	Allman, Gary	Migrated from version 2.5 project [SAP No											
SAP AG	AG, SAP	Migrated from version 2.5 project [SAP No											
4	<p>The resulting dialog shows the current project members. Press the <b>Modify</b> button to add or remove members from the project.</p>												

<p>5</p>	<p>You will see the <b>Select Members</b> dialog. Select a role and users account from the top list and press <b>Add</b> to add the account to the project's member list.</p> 
<p>6</p>	<p>Press <b>OK</b> to return to the member list. Then press <b>OK</b> again to save your project team.</p>

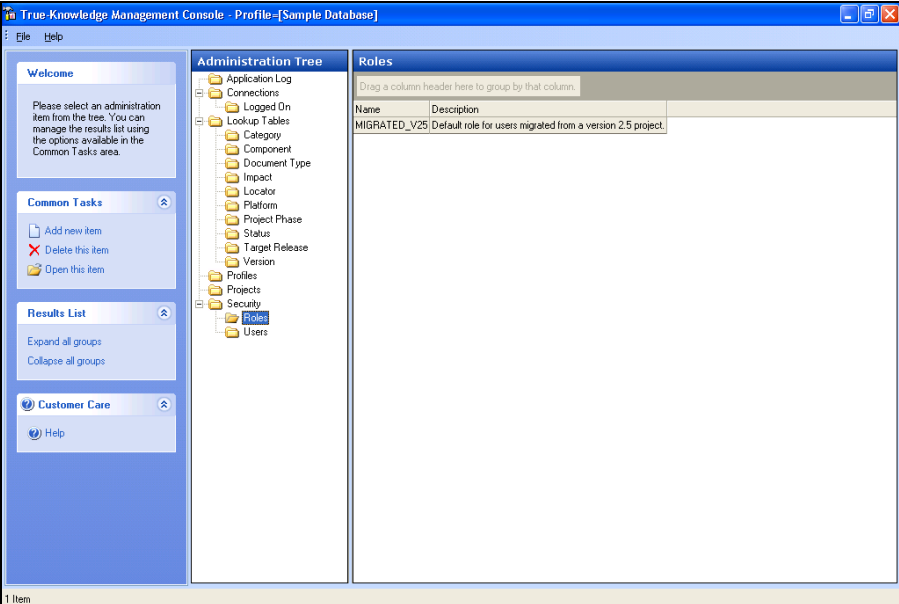
# Managing Security Roles

## Introduction

This section explains how to manage security roles with the True-Knowledge Management Console.

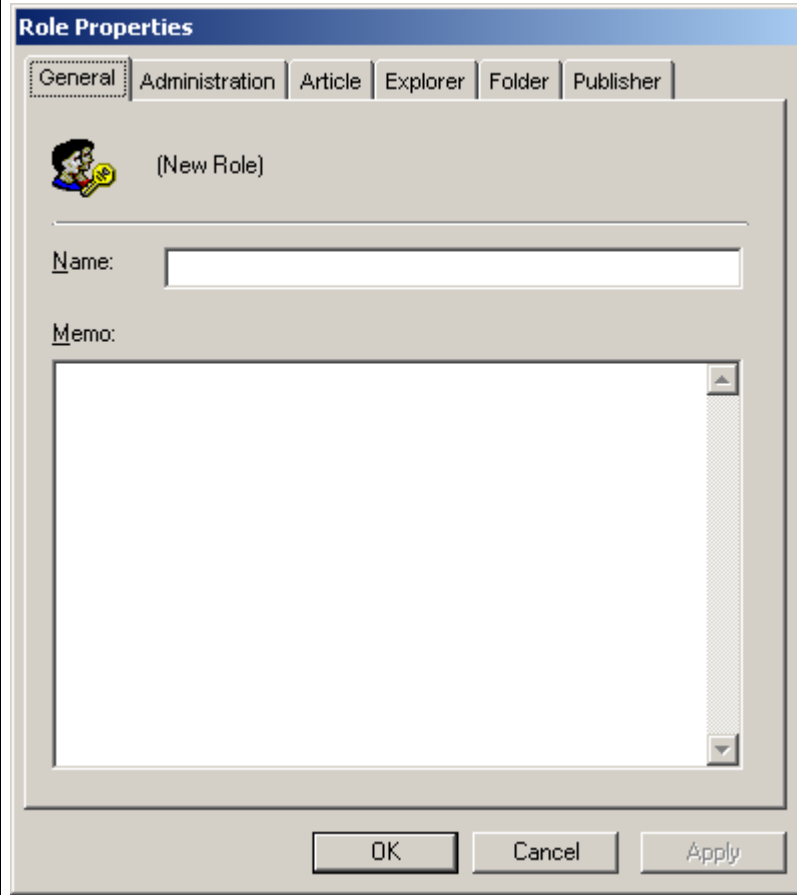
## Add Role

To add a new security role:

Step	Action
1	Start the Management Console
2	<p>Select the <b>Roles</b> folder from the Administration Tree.</p> 
3	Choose the <b>Add new item</b> task from the <b>Common Tasks</b> section.

4

Fill in the role information and designated privileges. Then press **OK** to save the new role. You should now see this role in the list of available roles.



**Change Role**

Follow these steps to change an existing security role.

Step	Action
1	Start the Management Console
2	Select the <b>Roles</b> folder from the Administration Tree and the list of available roles will be displayed in the results pane. Select a role from the list.
3	Choose the <b>Open this item</b> task from the <b>Common Tasks</b> section.

4 Fill in the role information and press **OK** to save your changes.

The screenshot shows a 'Role Properties' dialog box with the following details:

- Title:** Role Properties
- Tabs:** General (selected), Administration, Article, Explorer, Folder, Publisher
- Role Name:** MIGRATED\_V25
- Name Field:** Contains 'MIGRATED\_V25'
- Memo Field:** Contains 'Default role for users migrated from a version 2.5 project.'
- Buttons:** OK, Cancel, Apply

**Remove Role**

Follow these steps to remove an existing security role.

Step	Action
1	Start the Management Console
2	Select the <b>Roles</b> folder from the Administration Tree and the list of available roles will be displayed in the results pane. Select a role from the list.
3	Choose the <b>Delete this item</b> task from the <b>Common Tasks</b> section.
4	Confirm your action by pressing <b>Yes</b> at the confirmation prompt. If this role is not in used by any projects, it will be removed from the database.

# Managing Lookup Table Data

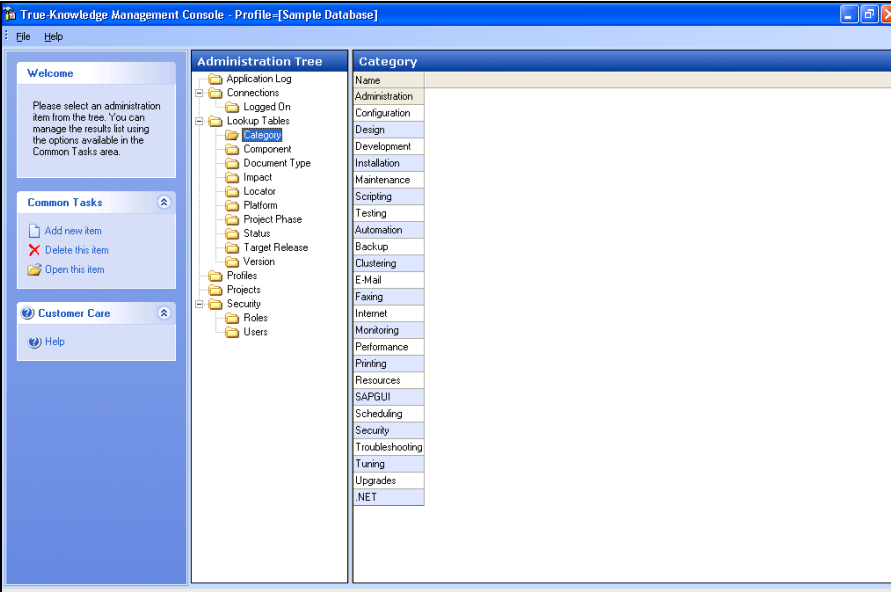
## Introduction

Lookup tables contain the data that appear in the various drop-down lists within the Article Editor. There lookup values include the following article property types:

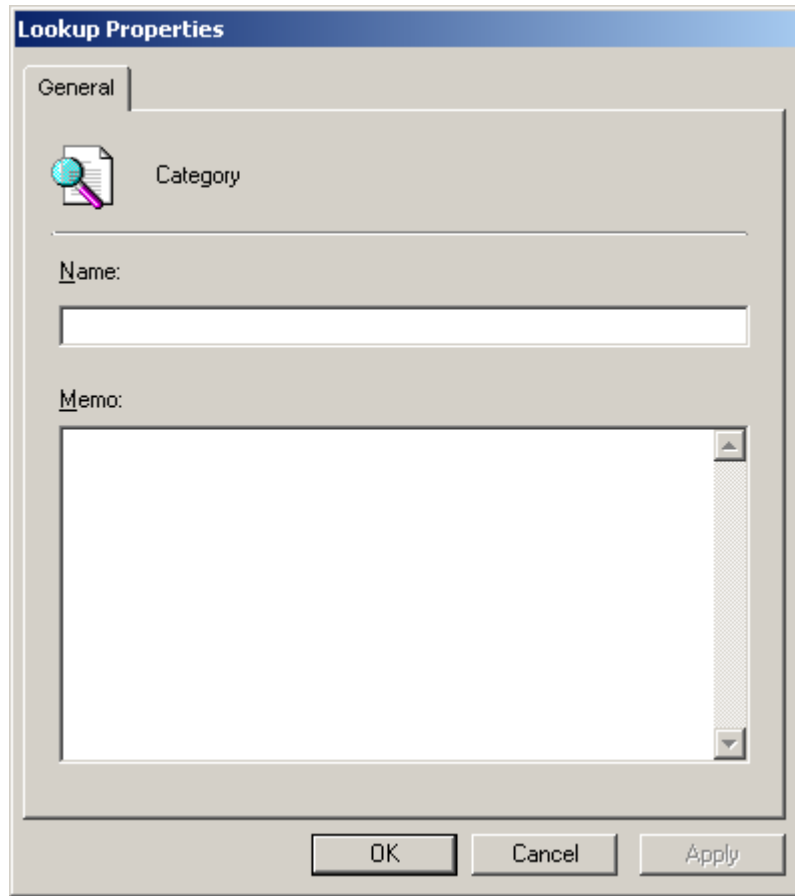
- Categories
- Components
- Document Types
- Impact
- Locator Codes
- Platforms
- Project Phases
- Status
- Target Releases
- Versions

This section explains how to manage lookup table data using the Management Console.

**Add Lookup Value** Follow these steps to add a new lookup value to a lookup table.

Step	Action
1	Start the Management Console
2	Navigate to the <b>Lookup Tables</b> folder and select one of the available lookup table types. 
3	Choose the <b>Add new item</b> task from the <b>Common Tasks</b> section.

- 4 Fill in the appropriate information. Then press **OK** to save your entry. You should now see this value in the list of available values for your lookup table.



**Change Lookup Value**

Follow these steps to change an existing lookup value within a lookup table.

Step	Action
1	Start the Management Console
2	Navigate to the <b>Lookup Tables</b> folder and select one of the available lookup table types. The list of available values will be displayed in the results pane.
3	Choose the <b>Open this item</b> task from the <b>Common Tasks</b> section.
4	Fill in the appropriate information. Then press <b>OK</b> to save your entry. You should now see the updated value in the list of available values for your lookup table.

**Remove Lookup Value**

Follow these steps to remove an existing lookup value from a lookup table.

---

<b>Step</b>	<b>Action</b>
1	Start the Management Console
2	Navigate to the <b>Lookup Tables</b> folder and select one of the available lookup table types. The list of available values will be displayed in the results pane. Select a value.
3	Choose the <b>Delete this item</b> task from the <b>Common Tasks</b> section.
4	Confirm your action by pressing <b>Yes</b> at the confirmation prompt. If this value is not in use by any articles, it will be removed from the database.

---

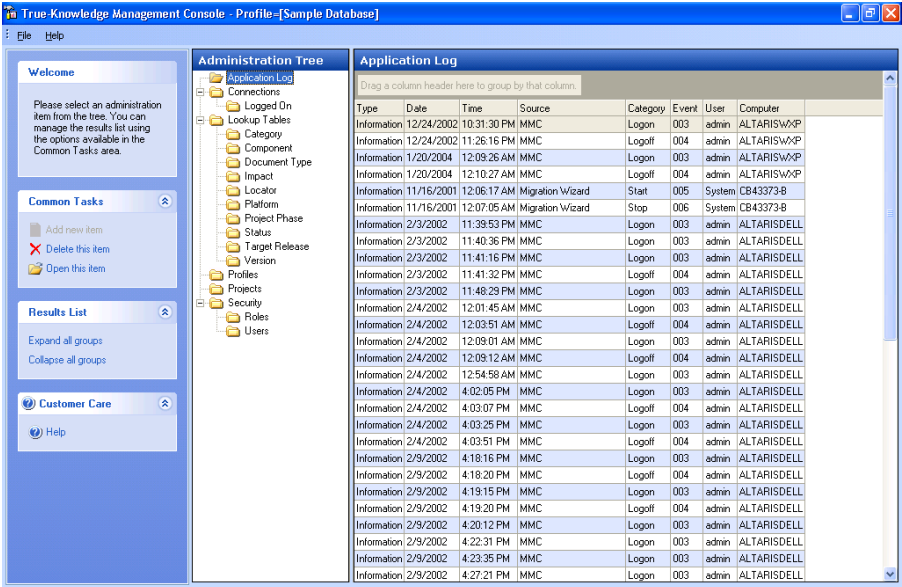
## Other Activities

**Who's Logged On?** Follow these steps to display a list of users that are logged onto a True-Knowledge database.

Step	Action
1	Start the Management Console
2	Navigate to the <b>Connections</b> folder and select the <b>Logged On</b> folder. The list of logged on users will be displayed in the results pane.

**View Application Log** Follow these steps to view the application log events for an existing True-Knowledge database:

Step	Action
1	Start the Management Console
2	Select the <b>Application Log</b> folder. A list of logged events will be displayed in the results pane.

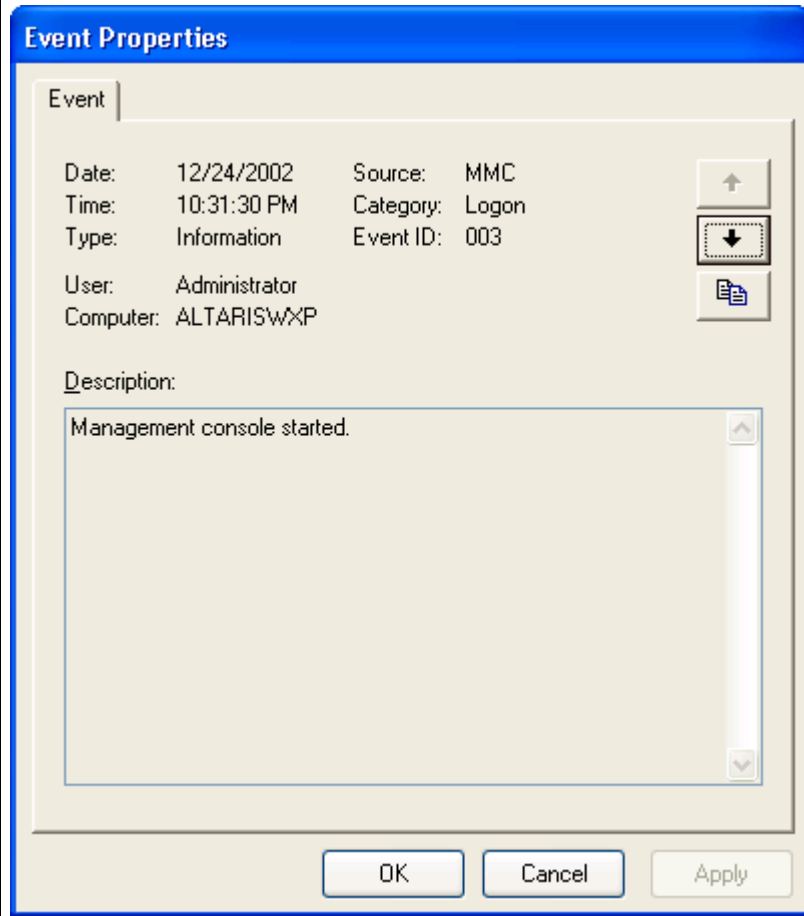


The screenshot shows the True-Knowledge Management Console interface. The Administration Tree on the left has the 'Application Log' folder selected. The Results List pane on the right displays a table of log events with the following columns: Type, Date, Time, Source, Category, Event, User, and Computer. The table contains 20 rows of log entries, including information about logon and logoff events for various users and system events like Migration Wizard.

Type	Date	Time	Source	Category	Event	User	Computer
Information	12/24/2002	10:31:30 PM	MMC	Logon	003	admin	ALTARISWXP
Information	12/24/2002	11:26:16 PM	MMC	Logoff	004	admin	ALTARISWXP
Information	1/20/2004	12:09:26 AM	MMC	Logon	003	admin	ALTARISWXP
Information	1/20/2004	12:10:27 AM	MMC	Logoff	004	admin	ALTARISWXP
Information	11/16/2001	12:06:17 AM	MMC	Logon	004	admin	ALTARISWXP
Information	11/16/2001	12:06:17 AM	MMC	Migration Wizard	Start	005	System
Information	11/16/2001	12:07:05 AM	MMC	Migration Wizard	Stop	006	System
Information	2/3/2002	11:39:53 PM	MMC	Logon	003	admin	ALTARISDELL
Information	2/3/2002	11:40:36 PM	MMC	Logon	003	admin	ALTARISDELL
Information	2/3/2002	11:41:16 PM	MMC	Logon	003	admin	ALTARISDELL
Information	2/3/2002	11:41:32 PM	MMC	Logoff	004	admin	ALTARISDELL
Information	2/3/2002	11:48:29 PM	MMC	Logon	003	admin	ALTARISDELL
Information	2/4/2002	12:01:45 AM	MMC	Logon	003	admin	ALTARISDELL
Information	2/4/2002	12:03:51 AM	MMC	Logoff	004	admin	ALTARISDELL
Information	2/4/2002	12:09:01 AM	MMC	Logon	003	admin	ALTARISDELL
Information	2/4/2002	12:09:12 AM	MMC	Logoff	004	admin	ALTARISDELL
Information	2/4/2002	12:54:58 AM	MMC	Logon	003	admin	ALTARISDELL
Information	2/4/2002	4:02:05 PM	MMC	Logon	003	admin	ALTARISDELL
Information	2/4/2002	4:03:07 PM	MMC	Logoff	004	admin	ALTARISDELL
Information	2/4/2002	4:03:25 PM	MMC	Logon	003	admin	ALTARISDELL
Information	2/4/2002	4:03:51 PM	MMC	Logoff	004	admin	ALTARISDELL
Information	2/9/2002	4:18:16 PM	MMC	Logon	003	admin	ALTARISDELL
Information	2/9/2002	4:18:20 PM	MMC	Logoff	004	admin	ALTARISDELL
Information	2/9/2002	4:19:15 PM	MMC	Logon	003	admin	ALTARISDELL
Information	2/9/2002	4:19:20 PM	MMC	Logoff	004	admin	ALTARISDELL
Information	2/9/2002	4:20:12 PM	MMC	Logon	003	admin	ALTARISDELL
Information	2/9/2002	4:22:31 PM	MMC	Logon	003	admin	ALTARISDELL
Information	2/9/2002	4:23:35 PM	MMC	Logon	003	admin	ALTARISDELL
Information	2/9/2002	4:27:21 PM	MMC	Logon	003	admin	ALTARISDELL

3

To **Display** an event, select the event from the list and choose **Open this item** task from the **Common Tasks** section. You will then see more details for the selected event.



**Remove Application Log Entry**

Follow these steps to remove an application log event from an existing True-Knowledge database:

Step	Action
1	Start the Management Console
2	Select the <b>Application Log</b> folder. A list of logged events will be displayed in the results pane.
3	Select an event from the list and choose <b>Delete this item</b> from the <b>Common Tasks</b> section.
4	Confirm your action by pressing <b>Yes</b> at the confirmation prompt. The selected entry will be removed from the database.



## **PART 5 – ADDITIONAL TOOLS**

## Using the Jet Compact & Repair Wizard

### Introduction

For Access-compatible databases, over a period of extensive updates and usage, the size of the database grows with temporary space. These databases can be compacted to reduce the wasted space, if possible. The **Compact and Repair Wizard** is provided to accomplish this compacting and repairing process. The tasks performed by the wizard are virtually identical to those performed by the Microsoft Access compact and repair operations.

This section explains how to use the Jet Compact & Repair Wizard.

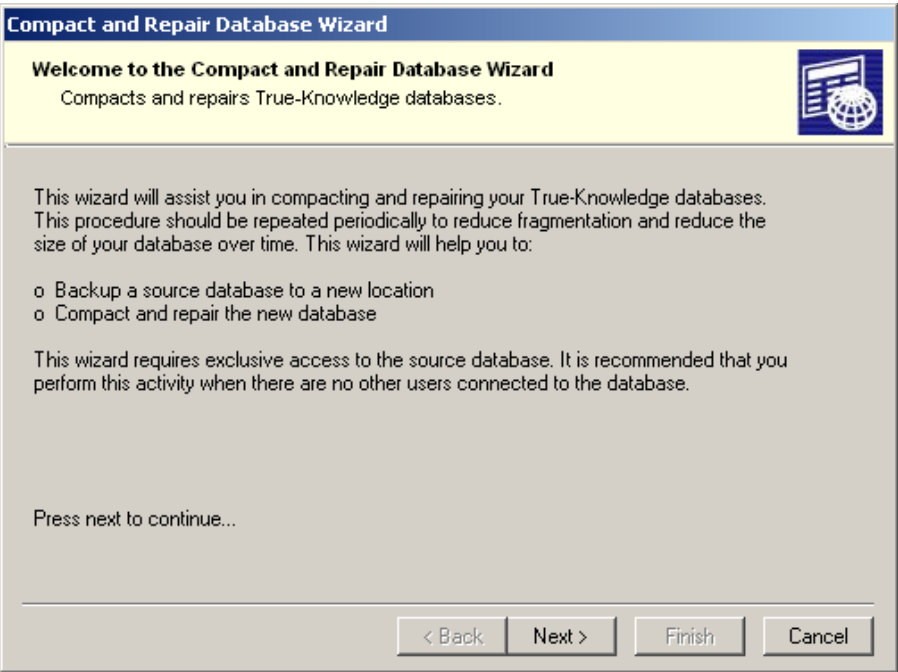
### Special Considerations

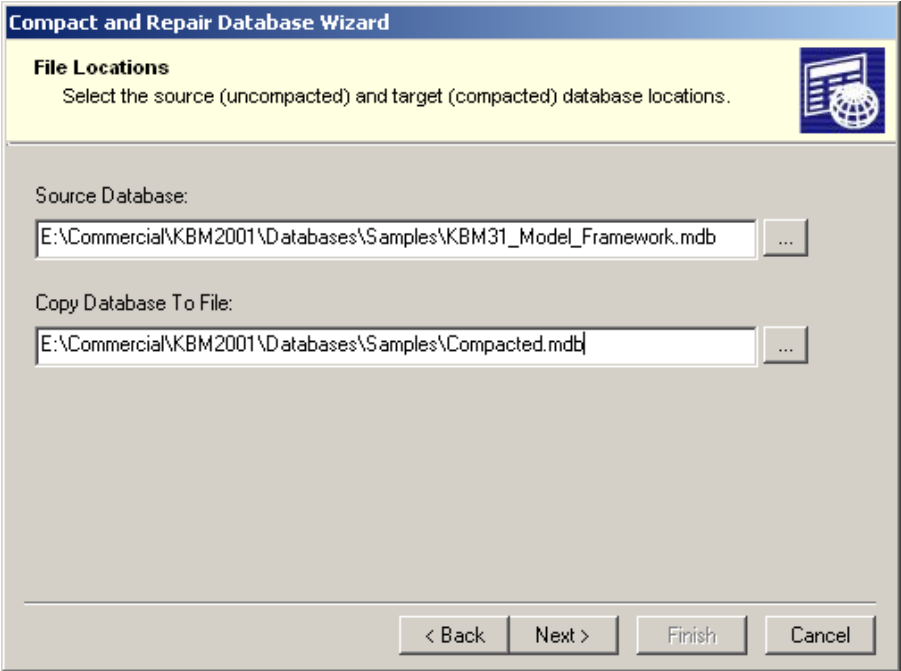
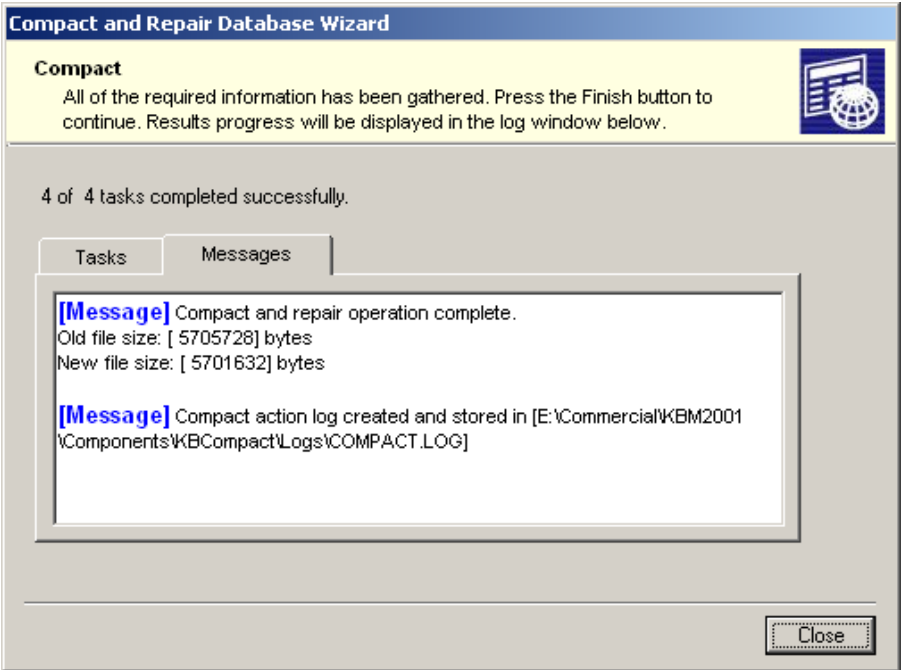
Please note the following:

- This wizard is will not work on non-Access databases (e.g. SQL Server).
- If you're Access-compatible database cannot be repaired, you should use a valid copy of Microsoft Access 2000 or higher to repair the database. If the database is still corrupted, contact your administrator or Microsoft for additional assistance.

### Compact & Repair Database

Follow these steps to compact and repair an Access database using the Compact & Repair Wizard.

Step	Action
1	<p>From the True-Knowledge program group, execute the <b>Compact and Repair Wizard</b> or execute</p> <p><code>&lt;installation path&gt;\kcompact.exe.</code></p> <p>You will see the Compact and Repair dialog.</p> 

2	<p>After reviewing the introductory screen, press <b>Next</b> to continue.</p>
3	<p>On the next page, choose source and target database paths and then press <b>Next</b> to continue.</p> 
4	<p>To begin the compact and repair process, press <b>Finish</b>. The wizard will process the source database and produce an output log upon completion.</p> 
5	<p>Press <b>Close</b> to exit the wizard.</p>



# Using the Publisher for HTML Help

## Introduction

The Publisher for HTML Help (khelwiz.exe) allows you to compress and compile your database into a Microsoft HTML Help-format file. This read-only file can then be distributed or hosted on a website. This is convenient for sharing with users who do have a copy of the True-Knowledge product.

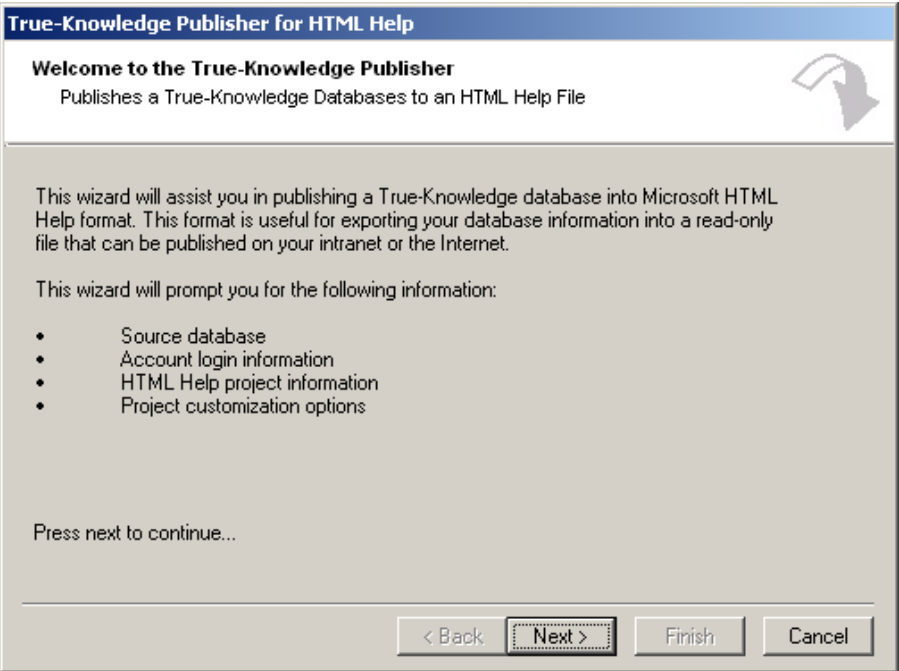
## Requirements

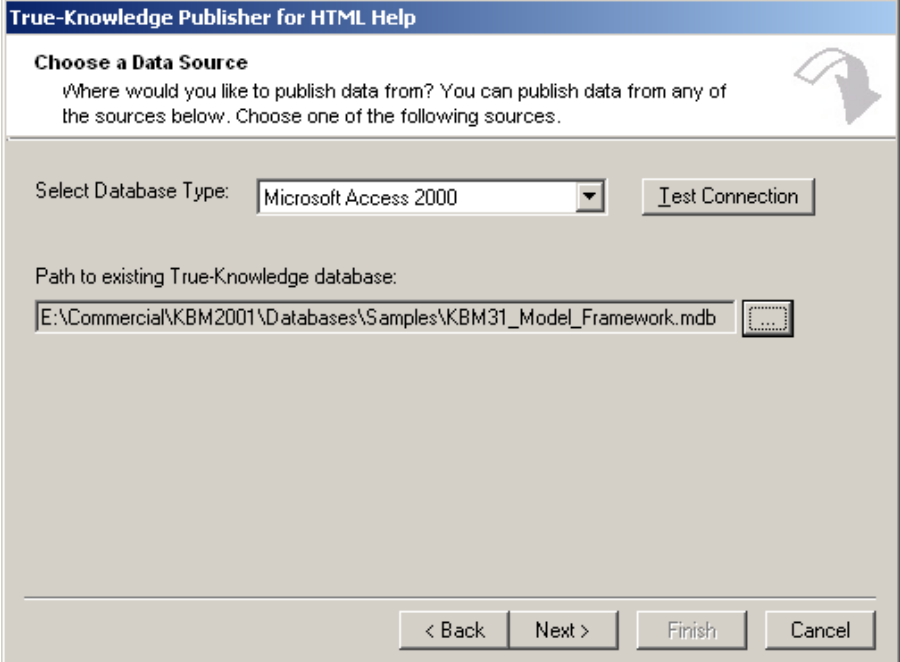
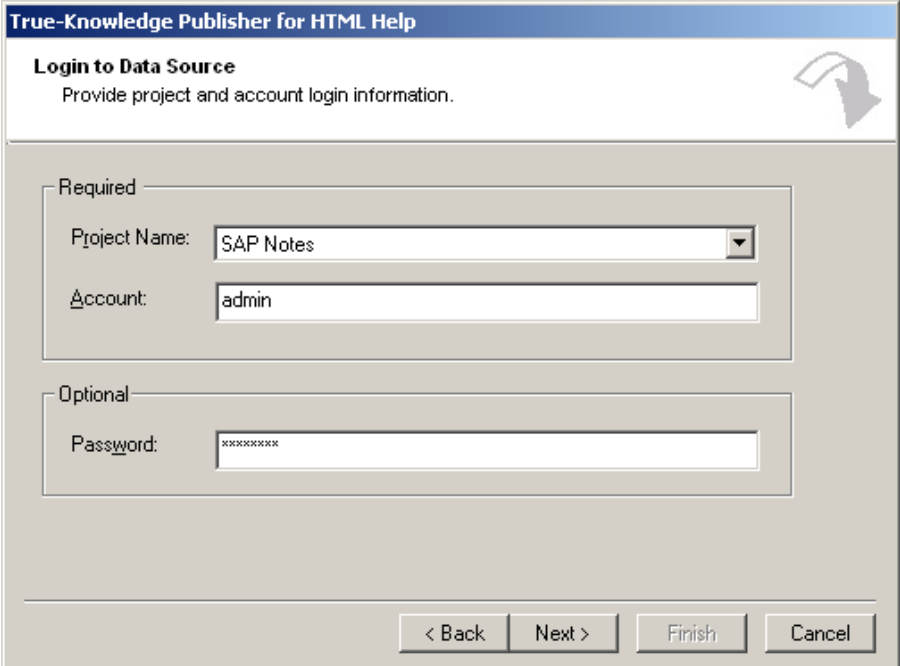
The following requirements must be met prior to using this tool.

- Free Microsoft HTML Help compiler. A copy of the MS HTML Help Software Developers Kit can be downloaded from <http://msdn.microsoft.com/library/default.asp?url=/library/en-us/htmlhelp/html/vsconhh1start.asp>.
- A connection to a valid True-Knowledge database.
- A True-Knowledge administrator or account with appropriate publishing privilege.

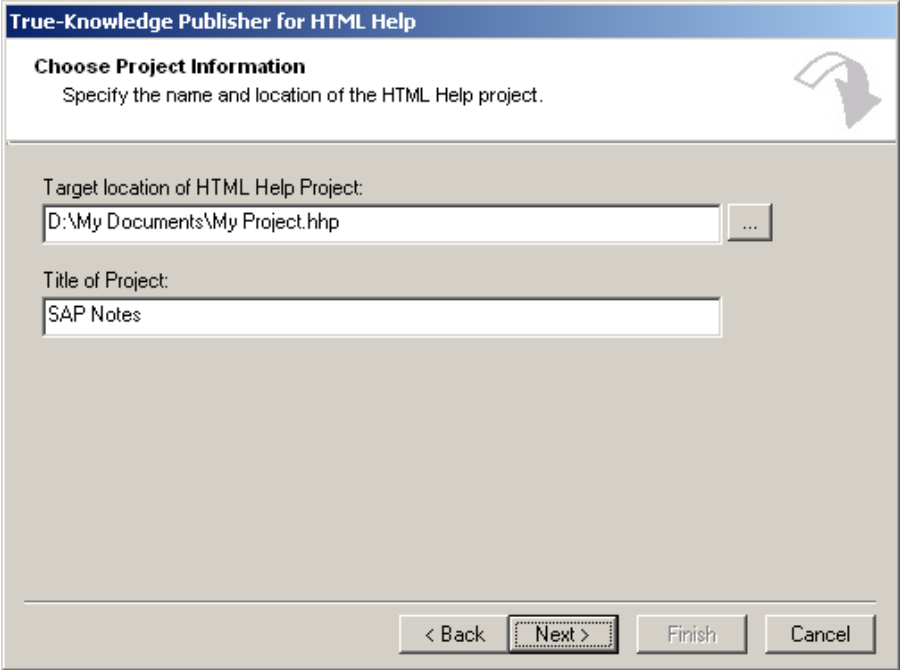
## Publish a Database

Follow these steps to publish a True-Knowledge database in Microsoft HTML Help format.

Step	Action
1	<p>From the True-Knowledge program group, execute the <b>Publisher for HTML Help</b> or execute</p> <pre>&lt;installation path&gt;\khelwiz.exe.</pre> <p>You will see the <b>Publisher</b> dialog.</p> 
2	After reviewing the introductory screen, press <b>Next</b> to continue.

<p>3</p>	<p>On the next page, choose an existing database connection and then press <b>Next</b> to continue.</p>  <p>The screenshot shows a dialog box titled "True-Knowledge Publisher for HTML Help" with a sub-header "Choose a Data Source". Below the sub-header is a question: "Where would you like to publish data from? You can publish data from any of the sources below. Choose one of the following sources." There is a "Test Connection" button to the right. Below this is a "Select Database Type:" label followed by a dropdown menu showing "Microsoft Access 2000". Underneath is a text field for the "Path to existing True-Knowledge database:" containing the path "E:\Commercial\KBM2001\Databases\Samples\KBM31_Model_Framework.mdb" and a browse button. At the bottom are buttons for "&lt; Back", "Next &gt;", "Finish", and "Cancel".</p>
<p>4</p>	<p>Now specify valid project and account login credentials and press <b>Next</b> to continue. The account must be an administrator or have the necessary publishing privilege.</p>  <p>The screenshot shows a dialog box titled "True-Knowledge Publisher for HTML Help" with a sub-header "Login to Data Source". Below the sub-header is the instruction: "Provide project and account login information." There are two sections: "Required" and "Optional". The "Required" section contains a "Project Name:" dropdown menu with "SAP Notes" selected and an "Account:" text field with "admin" entered. The "Optional" section contains a "Password:" text field with "*****" entered. At the bottom are buttons for "&lt; Back", "Next &gt;", "Finish", and "Cancel".</p>

5 Specify the name and location of your new HTML Help project. Press **Next** to continue.



The screenshot shows a dialog box titled "True-Knowledge Publisher for HTML Help". The main heading is "Choose Project Information" with a sub-instruction: "Specify the name and location of the HTML Help project." There is a right-pointing arrow icon in the top right corner. The dialog contains two text input fields: "Target location of HTML Help Project:" with the value "D:\My Documents\My Project.hhp" and a browse button "..."; and "Title of Project:" with the value "SAP Notes". At the bottom, there are four buttons: "< Back", "Next >" (highlighted with a dotted border), "Finish", and "Cancel".

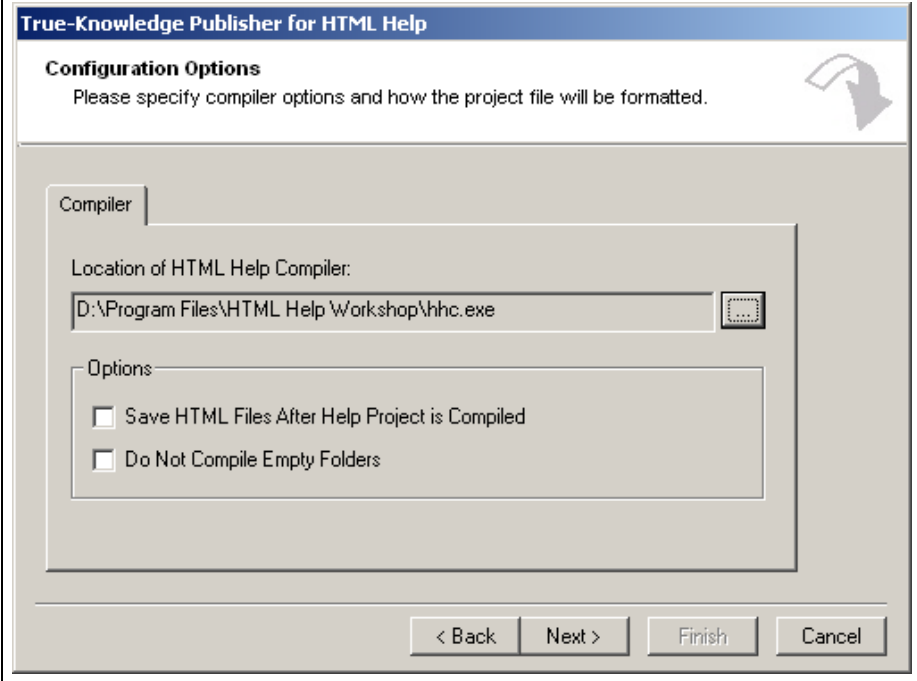
6

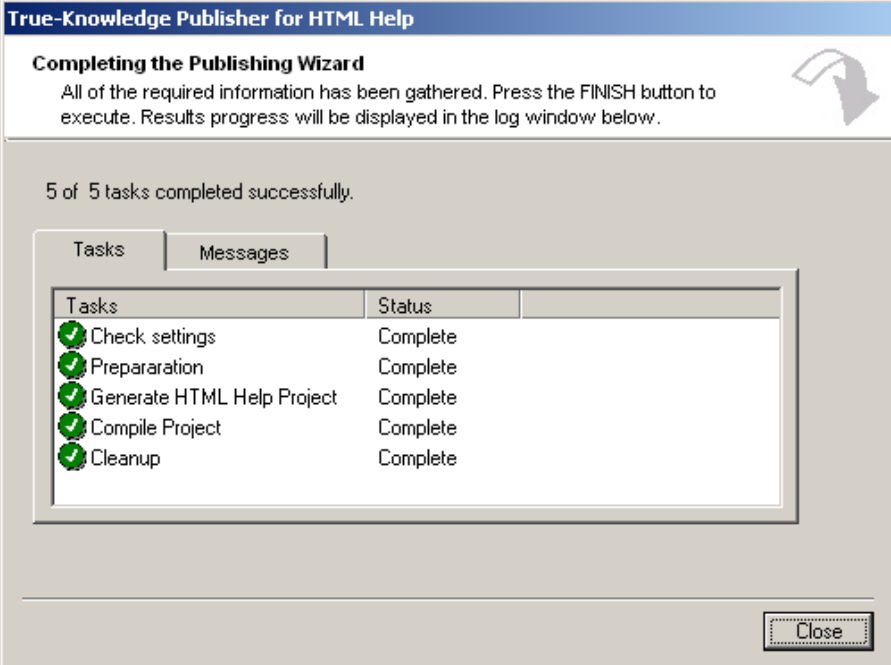
Specify the path to the HTML Help compiler. If you do have the compiler installed, you must obtain it from the Microsoft website. Additional compiler options are listed below:

**Save HTML Files:** Allows you to keep the entire project for import into another HTML Help application.

**Do Not Compile Empty Folders:** Removes empty folders from the output file.

When you are ready to proceed, press **Next** to continue.



7	<p>To begin the publishing process, press <b>Finish</b>. The wizard will process the project and produce an output log upon completion.</p>  <p><b>True-Knowledge Publisher for HTML Help</b></p> <p><b>Completing the Publishing Wizard</b></p> <p>All of the required information has been gathered. Press the FINISH button to execute. Results progress will be displayed in the log window below.</p> <p>5 of 5 tasks completed successfully.</p> <table border="1"><thead><tr><th>Tasks</th><th>Status</th></tr></thead><tbody><tr><td>✓ Check settings</td><td>Complete</td></tr><tr><td>✓ Preparation</td><td>Complete</td></tr><tr><td>✓ Generate HTML Help Project</td><td>Complete</td></tr><tr><td>✓ Compile Project</td><td>Complete</td></tr><tr><td>✓ Cleanup</td><td>Complete</td></tr></tbody></table> <p>Close</p>	Tasks	Status	✓ Check settings	Complete	✓ Preparation	Complete	✓ Generate HTML Help Project	Complete	✓ Compile Project	Complete	✓ Cleanup	Complete
Tasks	Status												
✓ Check settings	Complete												
✓ Preparation	Complete												
✓ Generate HTML Help Project	Complete												
✓ Compile Project	Complete												
✓ Cleanup	Complete												
8	Press <b>Close</b> to exit the wizard.												

## Replicating & Synchronizing Databases

### Introduction

Database replication involves the creation of one or more copies of an existing database. Changes within these databases are tracked and may be exchanged through a process known as synchronization. Replication can aid in performance (e.g. over wide area networks), allows backups to a master database and facilitates portability (e.g. work at home and synchronize with the office).

### Replication Functionality

True-Knowledge provides basic support for Jet database replication and synchronization. Since you are encouraged to utilize the replication tools provided by your database vendor, these wizards do not support advanced functionality such as Internet synchronization and conflict resolution.

### Limitations & Recommendations

Please note the following special considerations:

Item	Description
1	Only Microsoft Access databases can be managed with the True-Knowledge replication tools. These wizards will <u>not work</u> on non-Access databases (e.g. SQL Server).
2	For advanced replication and synchronization tools, please use the commercial tools provided by the database vendor (e.g. full copy of Microsoft Access or SQL Server, respectively).
3	The True-Knowledge replication tools are primarily intended for backward compatibility. We strongly suggest that you use the replication tools provided with Microsoft Access or SQL Server for your respective database.
4	You should always backup your database before performing replication. The replication process makes irreversible changes to your database that cannot be removed.

### Key Terms

The following table lists frequently-used replication terms.

Term	Definition
Design Master	The only member of the replica set in which you can make changes to the database structure that can be propagated to other replicas.
Replica	A copy of a database that is a member of a replica set and can be synchronized with other replicas in the set. Changes to the data in a replicated table in one replica are sent and applied to the other replicas.
Replica Set	The Design Master and all replicas that share the same database design and unique replica set identifier.

**Replication Tools**

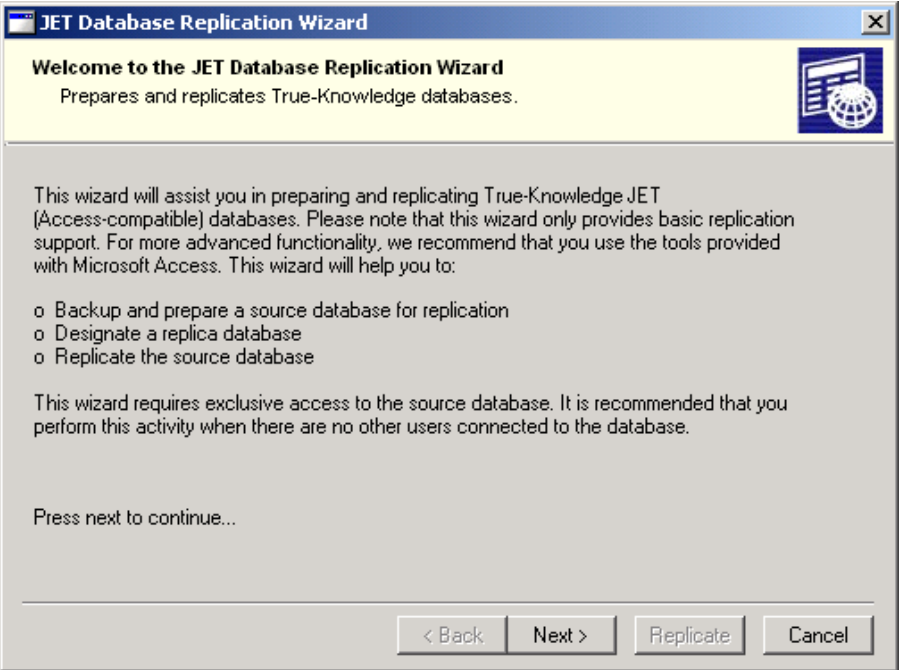
The following replication tools are provided with True-Knowledge:

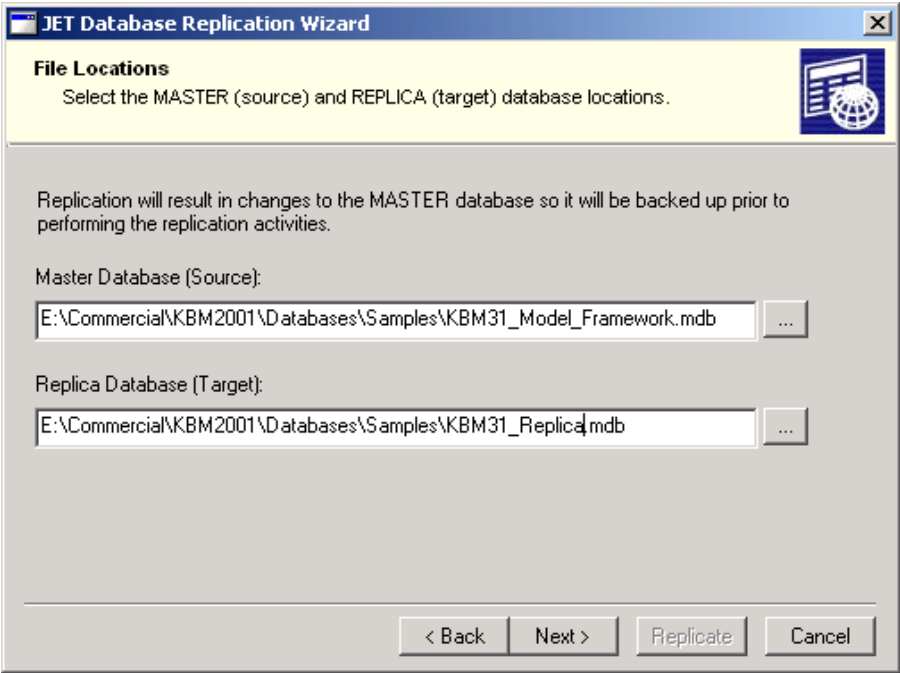
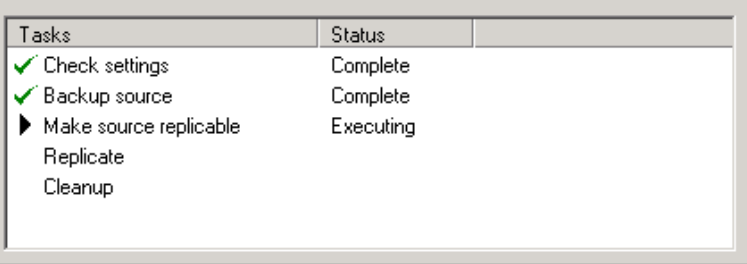
- Jet Replication Wizard creates a replica set.
  - Jet Synchronization Wizard synchronizes changes within a replica set.
-

## Using the Jet Replication Wizard

### Replicate a Database

Follow these steps to replicate a True-Knowledge database.

Step	Action
1	<p>From the True-Knowledge program group, execute the Jet Replication Wizard or execute</p> <pre data-bbox="576 541 1404 571">"&lt;installation path&gt;\kreplica.exe /ACTION=REPLICATE"</pre> <p>You will see the <b>Jet Database Replication</b> dialog.</p> 
2	<p>After reviewing the introductory screen, press <b>Next</b> to continue.</p>

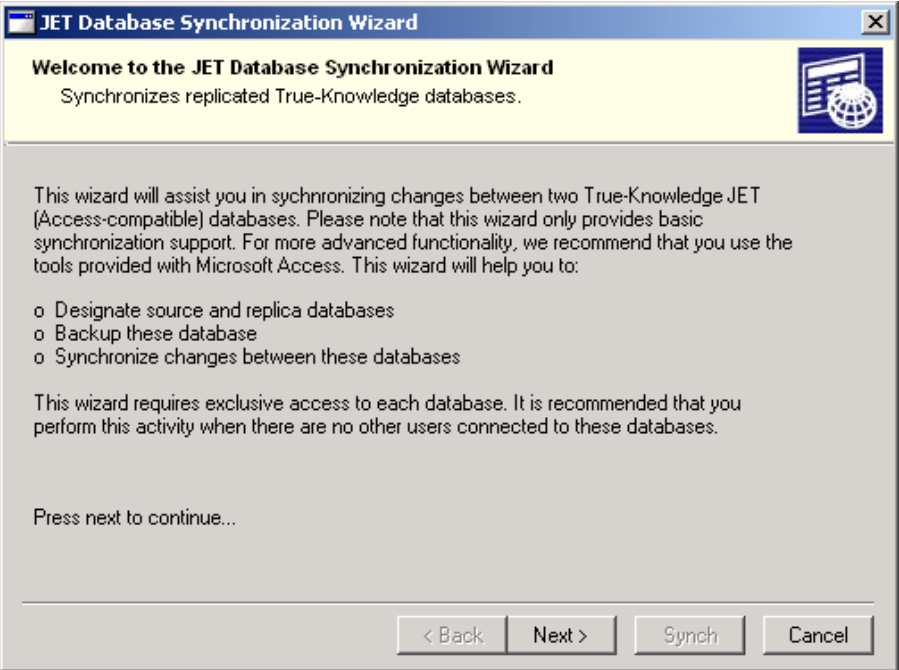
- 3 On the next page, specify the Design Master (Source) and Replica (Target) databases and then press **Next** to continue.
- 
- 4 To begin the replication process, press the **Replicate** button. The wizard will convert the source database to a design master (if necessary) and generate the replica. During processing a task list will be displayed and the results of the operation will be logged.
- 
- | Tasks | Status |
| --- | --- |
- |  |  |
| --- | --- |
| ✓ Check settings | Complete |
| ✓ Backup source | Complete |
| ▶ Make source replicable | Executing |
| Replicate |  |
| Cleanup |  |
- At the bottom right is a 'Close' button." data-bbox="354 541 904 859"/>
- 5 Press **Close** to exit the wizard.



## Using the Jet Synchronization Wizard

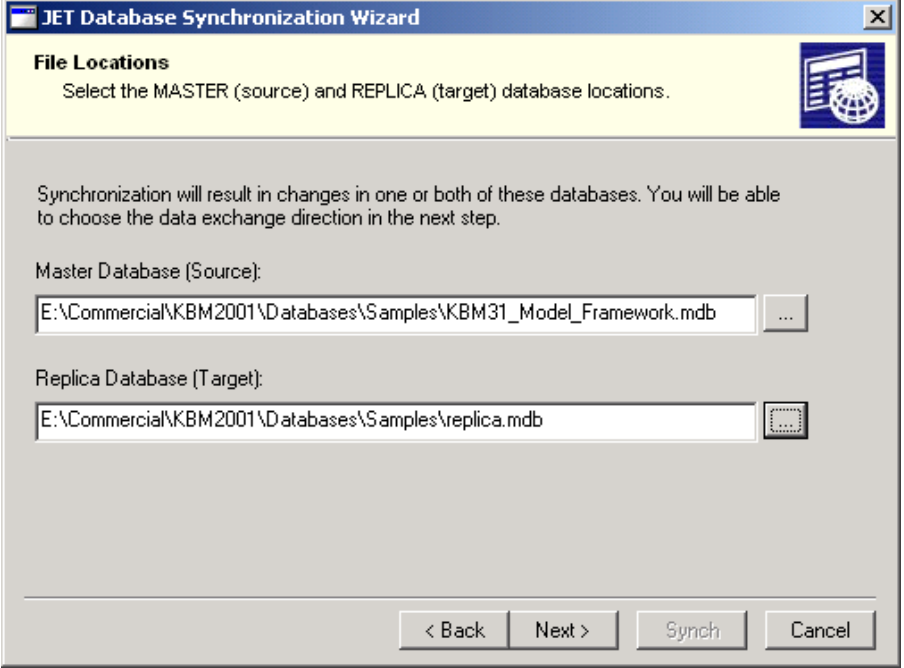
### Synchronize Databases

Follow these steps to synchronize changes between two True-Knowledge databases.

Step	Action
1	<p>From the True-Knowledge program group, execute the <b>Jet Synchronization Wizard</b> or execute</p> <pre>"&lt;installation path&gt;\kreplica.exe /ACTION=SYNCH"</pre> <p>You will see the <b>Jet Database Synchronization</b> dialog.</p> 
2	<p>After reviewing the introductory screen, press <b>Next</b> to continue.</p>

3

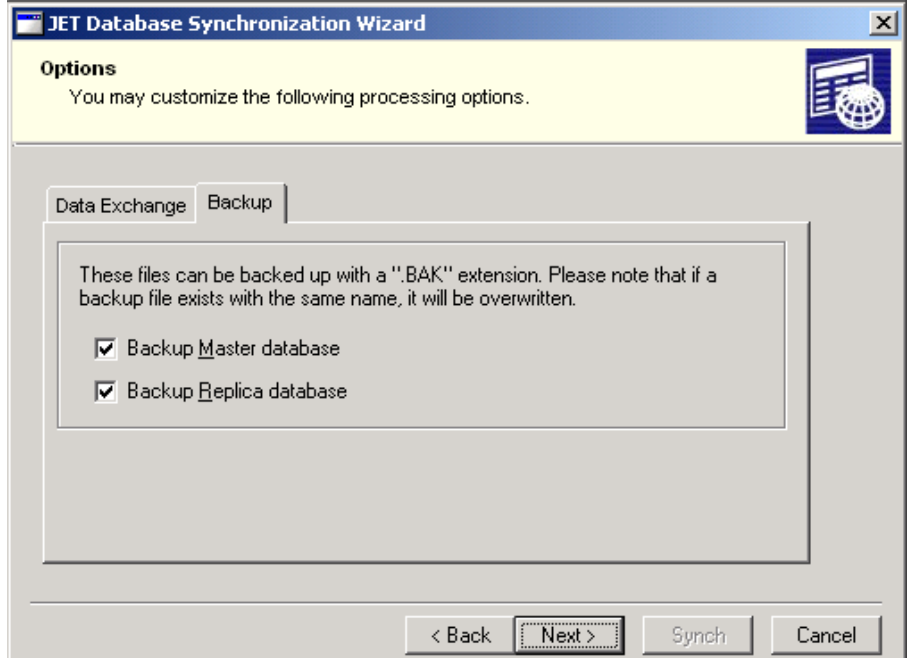
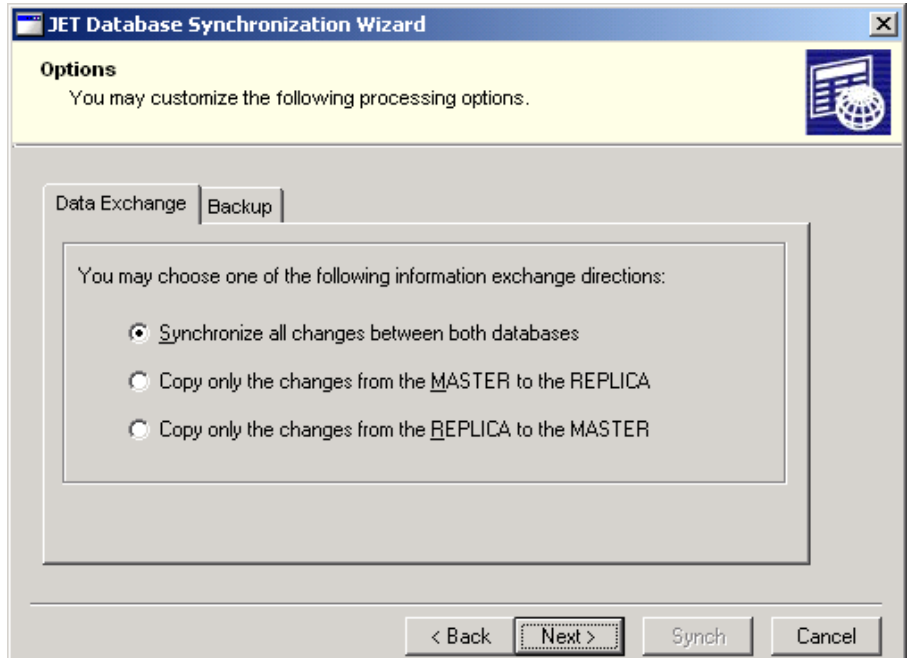
On the next page, specify the Design Master (Source) and Replica (Target) databases and then press **Next** to continue.



The screenshot shows a Windows-style dialog box titled "JET Database Synchronization Wizard". The window has a yellow header bar with the title and a close button. Below the header, the text "File Locations" is displayed in bold, followed by the instruction "Select the MASTER (source) and REPLICAs (target) database locations." To the right of this text is a small icon of a globe with a document. Below the instruction, a paragraph of text reads: "Synchronization will result in changes in one or both of these databases. You will be able to choose the data exchange direction in the next step." There are two input fields: "Master Database (Source):" with the text "E:\Commercial\KBM2001\Databases\Samples\KBM31\_Model\_Framework.mdb" and a browse button "..."; and "Replica Database (Target):" with the text "E:\Commercial\KBM2001\Databases\Samples\replica.mdb" and a browse button "...". At the bottom of the dialog, there are four buttons: "< Back", "Next >", "Synch", and "Cancel".

4

On the next page you may modify processing options such as the direction of data exchange and backup generation. After you have changed the desired settings, if any, press **Next** to continue.



<p>5</p>	<p>To begin the synchronization process, press the <b>Synch</b> button. The wizard will synchronize the changes between databases based upon the Data Exchange setting. During processing, a task list will be displayed and the results of the operation will be logged.</p> <thead> <tr> <th>Tasks</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>✓ Check settings</td> <td>Complete</td> </tr> <tr> <td>✓ Backup Files</td> <td>Complete</td> </tr> <tr> <td>✓ Synhronize Files</td> <td>Complete</td> </tr> <tr> <td>✓ Cleanup</td> <td>Complete</td> </tr> </tbody>	Tasks	Status	✓ Check settings	Complete	✓ Backup Files	Complete	✓ Synhronize Files	Complete	✓ Cleanup	Complete
Tasks	Status										
✓ Check settings	Complete										
✓ Backup Files	Complete										
✓ Synhronize Files	Complete										
✓ Cleanup	Complete										

 A 'Close' button is located at the bottom right of the window.
 


| 6 | Press **Close** to exit the wizard. |

## **PART 6 – MIGRATING FROM KB-MASTER 2.5**

## Migration Overview

### Introduction

Altaris Systems has provided the True-Knowledge Migration Wizard to assist administrators with the task of migrating existing KB-Master 2.5D (or higher) databases into a new True-Knowledge project. The new project-centered format of the True-Knowledge database allows multiple KB-Master databases to be migrated to a central database.

The Migration Wizard will assist you performing the following tasks:

- Migrate the old KB-Master data format to the True-Knowledge format
- Migrate and map old article ID's to the new sequential ID's. A mapping report and table are created for future reference.
- Automatic user account generation from KB-Master article author names.
- Automatic generation of True-Knowledge locator codes from old article ID's
- Automatic article abstract generation
- Generation of migration log for reference

### Technical Migration Details

This section explains some of the technical details behind the migration. Although the majority of these steps are automated, this topic is intended to help administrators understand how the data is transformed from a standalone database into a project within a centralized database.

#### Database to Project Migration

One of the major differences between KB-Master and True-Knowledge is the physical database layout. KB-Master used a central database. However, if a user wanted to segregate different projects within the same database, this could only be simulated with the use of folders. Conversely, True-Knowledge is project-focused with integrated security and account management.

To address the change in architecture, the wizard will automatically create a new Project in the target database and migrate the data accordingly. This project separation has the added benefit of permitting a load into the database without impacting other projects in the same database. If the administrator wishes to perform a trial run, this can easily be accomplished and then the test project can be deleted.

All project-dependent and article-dependent tables have a **ProjectID** and **ArticleID** key field(s), respectively. Referential integrity rules are in place to manage updates to these properties.

### Table Migration

The following table illustrates how KB-Master tables are migrated to True-Knowledge.

KB-Master 2.5 Table	Details
Attachments	Existing attachments are migrated and mapped to their new article ID. Refer to the article migration section for location of mapping information.

Category	By default, all entries are migrated to table Component. These entries are available to all projects in the target database.  <b>NOTE:</b> The wizard will allow you to migrate to the new Category table rather than Component.
Filter	Filters are not migrated because of the considerable database differences and new filter format.
FolderView	This table has been removed. Each article has a "FolderID" property that links it to a folder.
LocatorCode	Used locator codes are stripped from the old article ID and migrated to the new database. These entries are available to all projects in the target database.
PublicFolder	All entries are migrated to table ProjectFolder.
Sub_Category	By Default, all entries are migrated to table Category. These entries are available to all projects in the target database.  <b>NOTE:</b> The wizard will allow you to migrate to the new COMPONENT table rather than CATEGORY.
Topic	All entries are migrated to table ARTICLE. See the Article Migration section for more details.
UserLog	This table is not migrated. Logon tracking is managed with the PROJECTMEMBER and ACCOUNT tables accordingly.
View	This table is not migrated.
View_Column	This table is not migrated.

### Article Migration

A True-Knowledge article (formerly known as "Topic") contains a more extensive set of properties than KB-Master. The following table highlights some of the key Article table properties and their relation to KB-Master.

Property	Details
ProjectID	All articles now belong to a project.  <b>NOTE:</b> (Optional) Both the migration log and the SYSTEMARTICLECONVERTED25 table contain mapping information with the new ProjectID and ArticleID.

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ArticleID	<p><b>OLD:</b> KB-Master uses a topic ID convention of <code>&lt;locator-code&gt;-&lt;timestamp&gt;</code> for creating unique IDs.</p> <p><b>NEW:</b> However, True-Knowledge uses an ascending numeric value to identify the article. The migrated locator code has been moved to the <u>Article.LocatorID</u> property.</p> <p><b>NOTE:</b> (Optional) Both the migration log and the SYSTEMARTICLECONVERTED25 table contain mapping information with the new ProjectID and ArticleID.</p>
FolderID	<p><b>OLD:</b> KB-Master records folder-article relationships in table FolderView.</p> <p><b>NEW:</b> True-Knowledge maintains this relationship within the <u>FolderID</u> property.</p>
Body	<p><b>OLD:</b> KB-Master stores the topic body in field <u>Topic.Details</u>.</p> <p><b>NEW:</b> True-Knowledge stores the article body in <u>Article.Body</u>.</p>
Abstract	<p>The migration wizard can use up to the first 255 characters of the article body and generate an article abstract.</p>

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## Migrating from KB-Master 2.5

### Prepare for Migration

A migration of data from KB-Master to True-Knowledge is largely automated. However, it is important to understand the steps involved and the changes between the products.

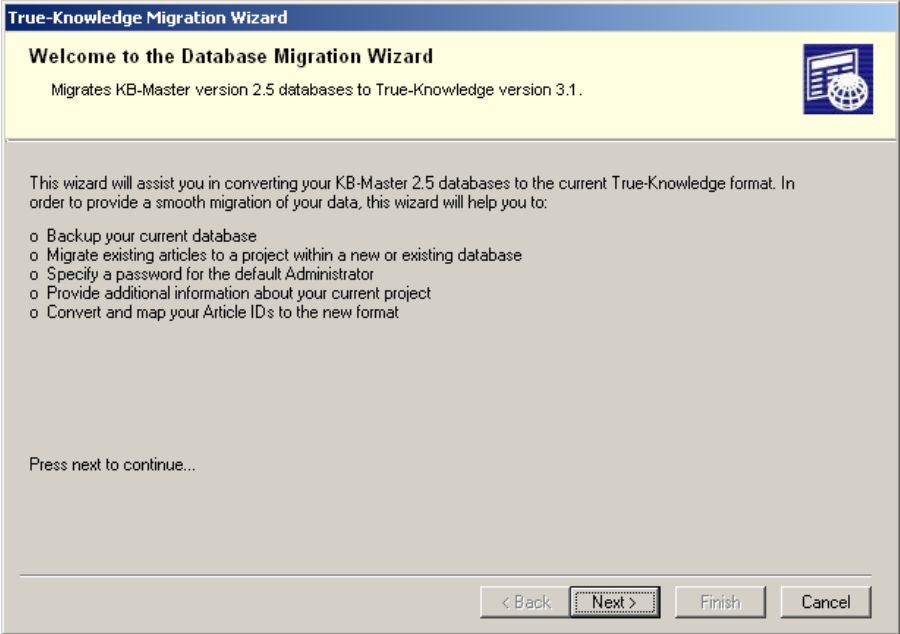
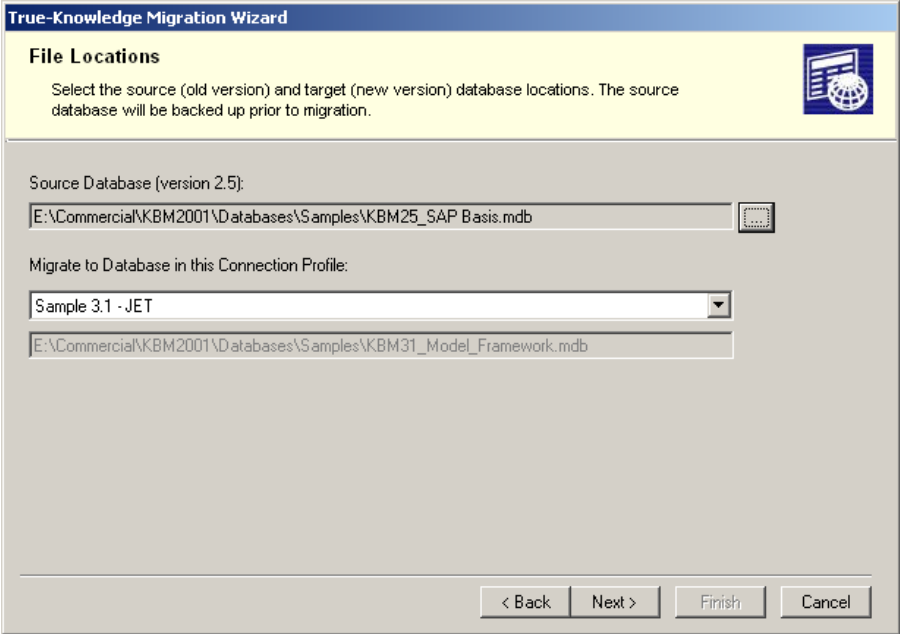
This section explains the key preparation tasks.

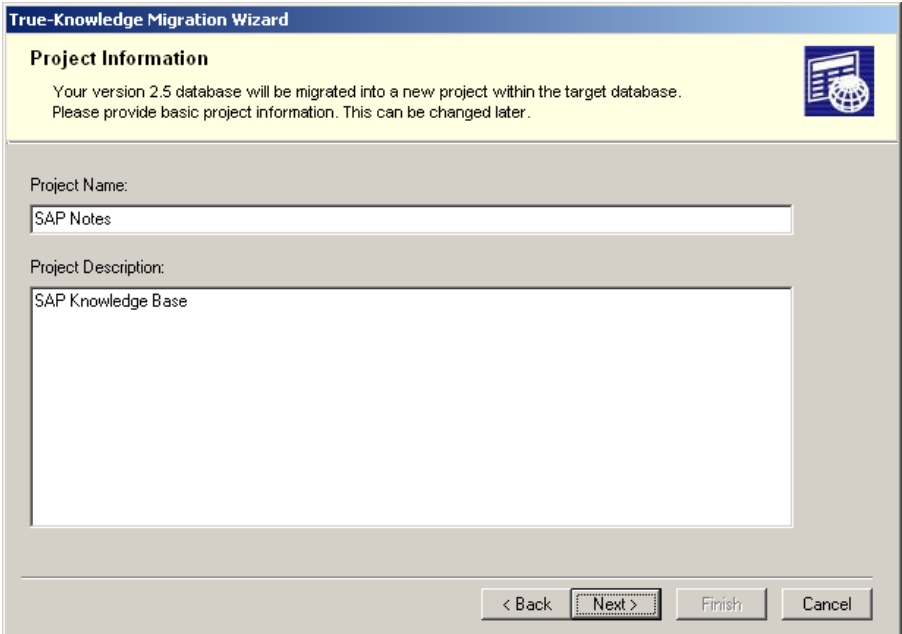
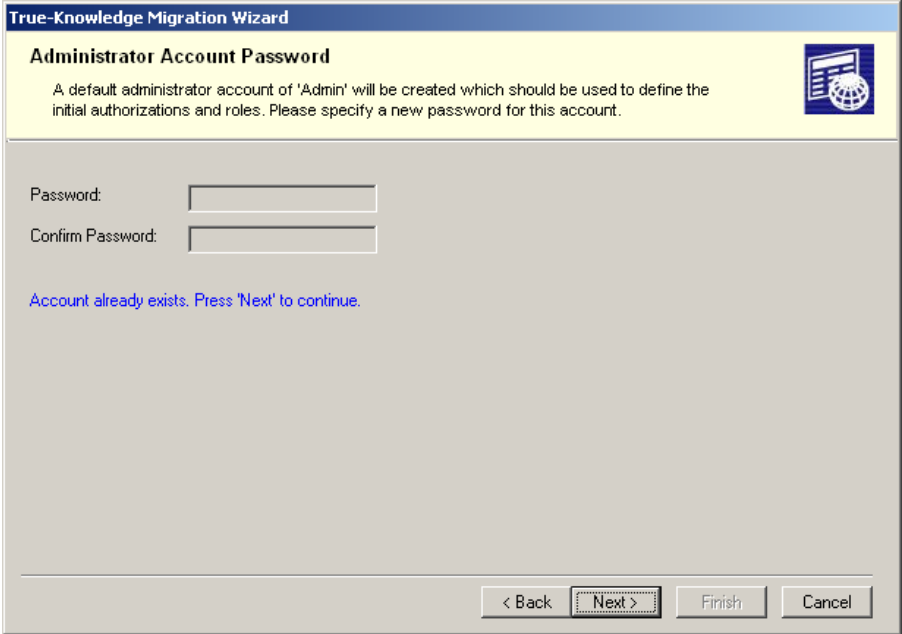
Task	Description
Read the online help or this guide.	
Backup	<p>Although the wizard will automatically generate a backup of the KB-Master database, it is always recommended that you perform your own backup prior to migration.</p> <p>If you have an existing True-Knowledge database with active data, it is <u>highly recommended</u> that you also backup this database as well.</p>
Create and prepare new database	The target True-Knowledge database must be created before the migration. You may use an existing database with active data or you may follow the <b>Getting Started</b> steps to create an initial database.
Create a connection profile	<p>The wizard will prompt you for a valid connection profile. At a minimum, the profile must contain a database connection and existing account name.</p> <p><b>NOTE 1:</b> If you are migrating a new database (i.e. contains no existing projects), you will update your profile with the correct <b>Project Credentials</b> following the migration.</p> <p><b>NOTE 2:</b> All True-Knowledge databases include an account named admin that has a blank password.</p>
Design your account and security architecture	Having your account and security conventions documented will save you time during your post-processing activities.

### Using the Migration Wizard

Follow these steps to migrate a KB-Master 2.5 database into a True-Knowledge project

Step	Action
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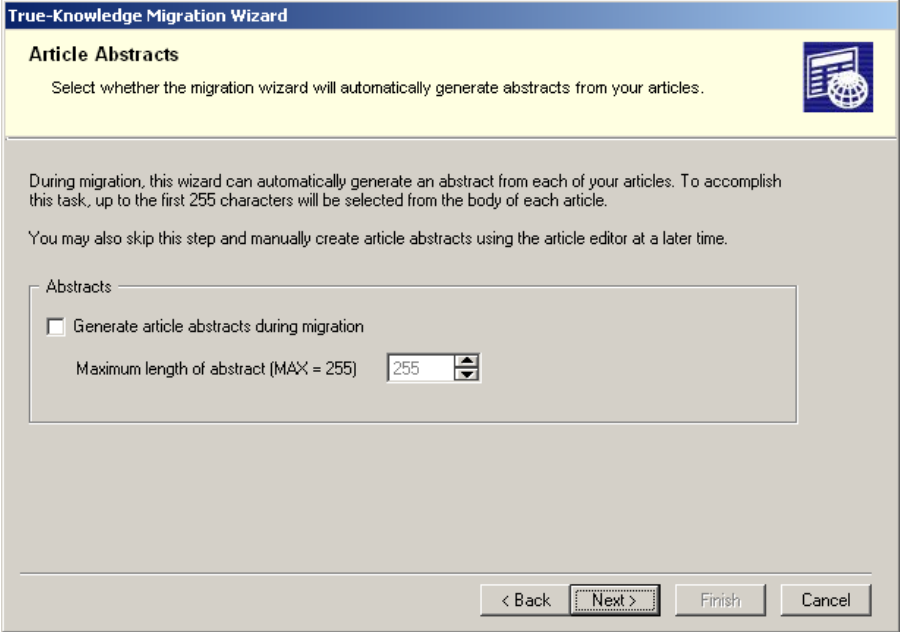
<p>1</p>	<p>From the True-Knowledge program group, execute the Migration Wizard. Alternatively, you may execute</p> <pre>&lt;installation path&gt;\kbm31cnv.exe</pre> <p>You will see the <b>Migration Wizard</b> dialog. Press <b>Next</b> to continue.</p> 
<p>2</p>	<p>On the File Locations screen, enter the path to a KB-Master 2.5 database and a True-Knowledge profile. When you have finished with this step, press <b>Next</b> to continue.</p> 

<p>3</p>	<p>The wizard will provide a default name for your migrated project. You may change the project name and description as desired. Press <b>Next</b> to continue.</p> 
<p>4</p>	<p>In most cases, the <b>admin</b> account should already exist in the target database. However, if it does not exist, the wizard will create the account and allows you to set the initial password. Proceed accordingly and then press <b>Next</b> to continue.</p> 

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On the **Article Abstracts** screen, you may allow the wizard to automatically generate an abstract (first 0-255 characters of article body) from your existing articles. Choose a valid value or leave this option blank.

Press **Next** to continue.

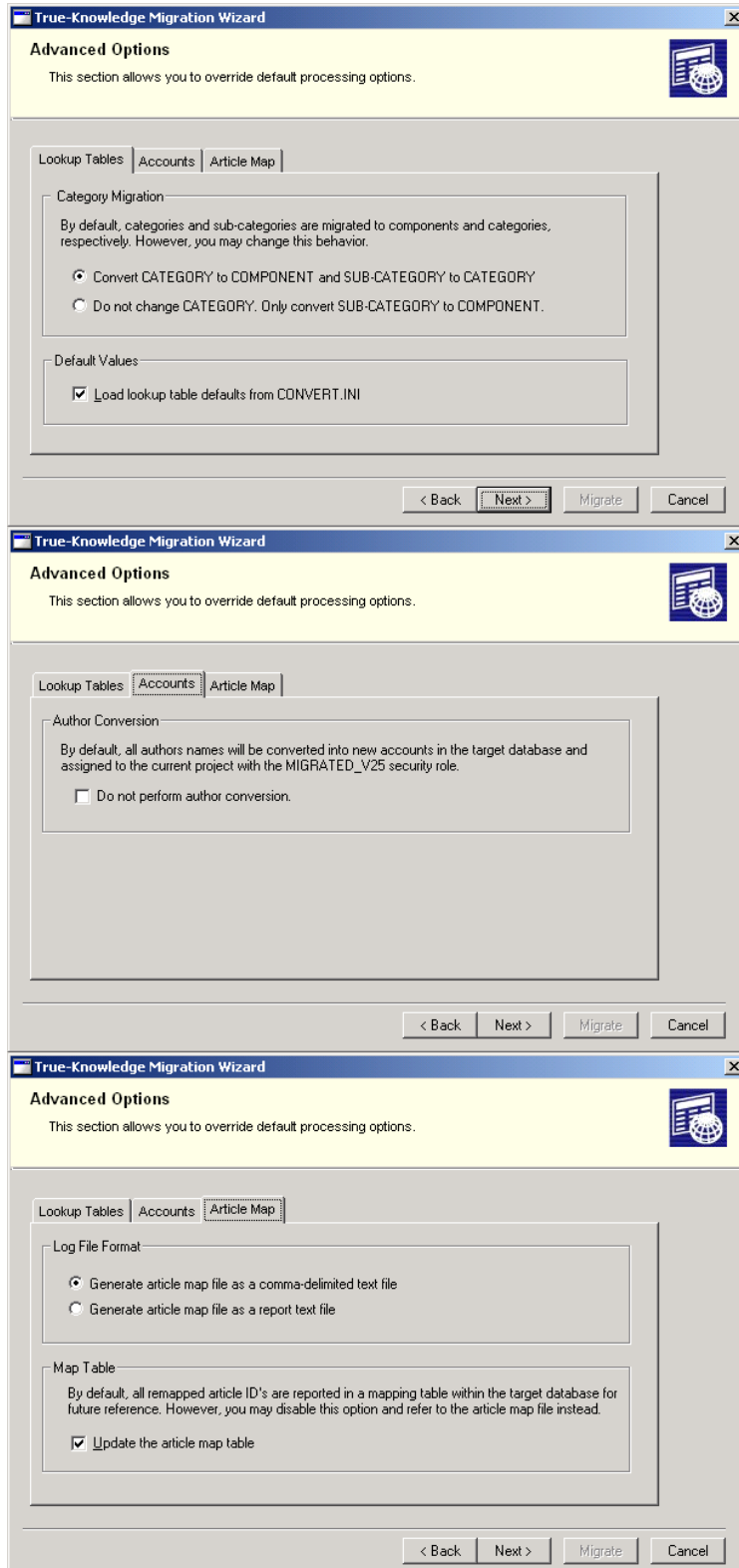


The screenshot shows a window titled "True-Knowledge Migration Wizard" with a yellow header bar containing the title "Article Abstracts" and a small globe icon. Below the header, the text reads: "Select whether the migration wizard will automatically generate abstracts from your articles." The main content area contains the following text: "During migration, this wizard can automatically generate an abstract from each of your articles. To accomplish this task, up to the first 255 characters will be selected from the body of each article. You may also skip this step and manually create article abstracts using the article editor at a later time." Below this text is a section titled "Abstracts" containing a checkbox labeled "Generate article abstracts during migration" which is currently unchecked. To the right of the checkbox is a text box labeled "Maximum length of abstract (MAX = 255)" with a spinner control showing the value "255". At the bottom of the window are four buttons: "< Back", "Next >" (highlighted with a dashed border), "Finish", and "Cancel".

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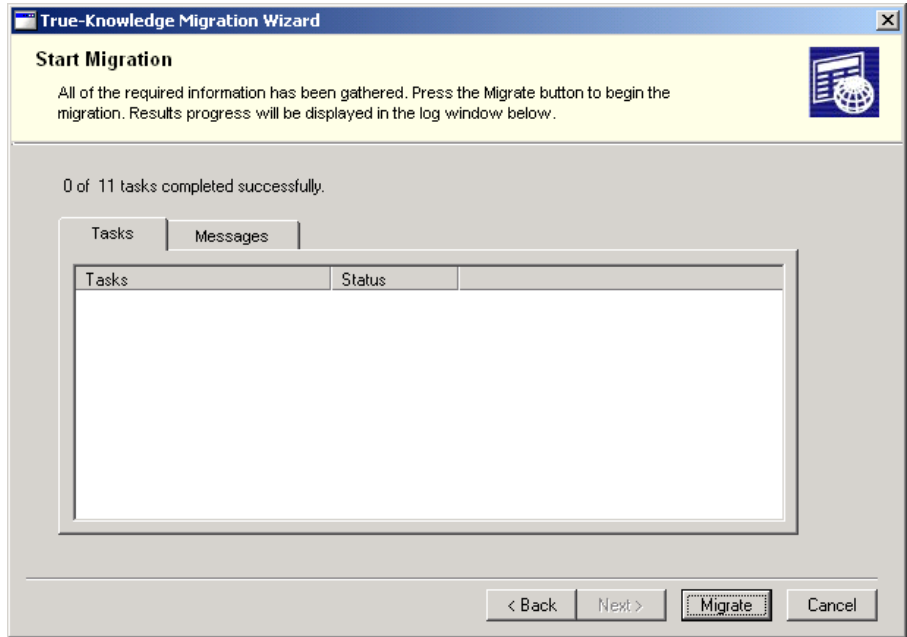
On the **Advanced Options** screen, you may change the default migration processing options as illustrated in the below screens.

Set your desired options and press **Next** to continue.



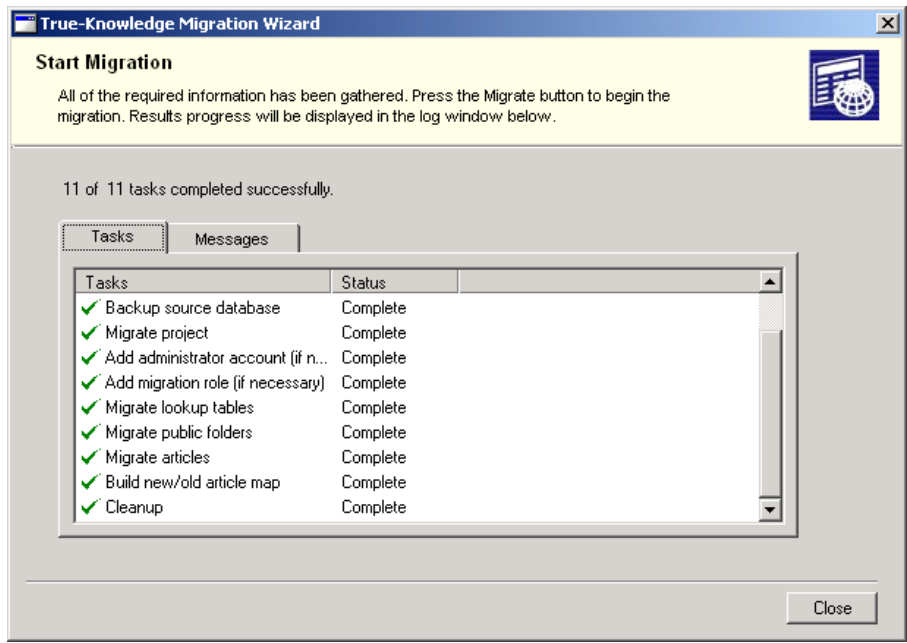
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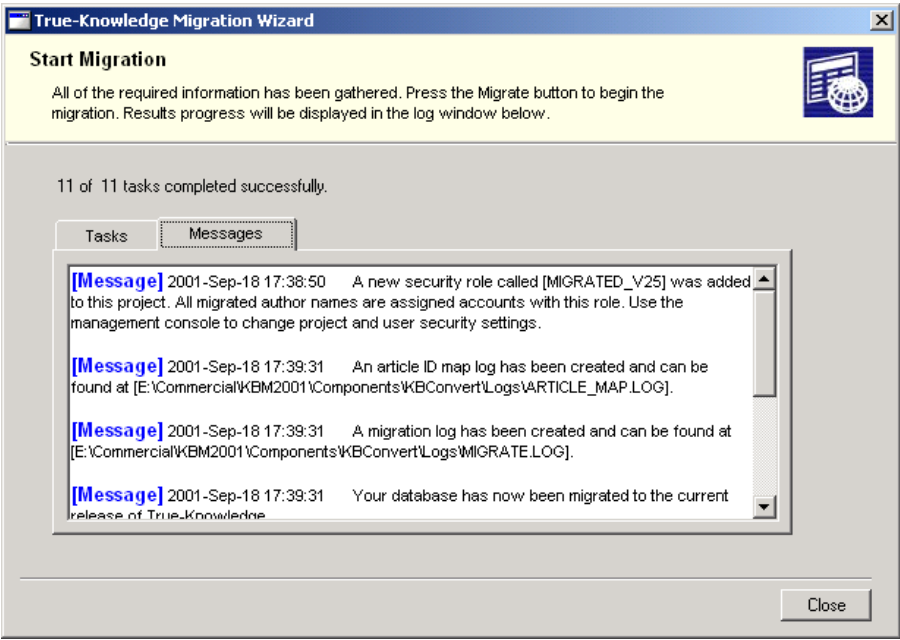
At the **Start Migration** screen, you are now ready to begin the migration. Press **Migrate** and the wizard will proceed through a list of migration tasks. If any errors occur, you will be notified.



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Once the wizard completes the migration, all task steps will be marked Complete and you will be shown a set of messages that contain both the status and location of the migration log. Read this information.



9	<p>Once you are ready to close the application, press the <b>Close</b> button.</p> 
10	<p>Proceed to the <u>M</u>igration <u>P</u>ost-<u>P</u>rocessing section.</p>

**Migration Post-Processing**

Follow these steps to perform True-Knowledge migration post-processing.

Step	Action
1	After performing the migration, review both the migration log (MIGRATE.LOG) and the article ID map (ARTICLE_MAP.LOG).
2	If your migration was successful, you should use the <b>Management Console</b> to further customize your database as necessary.
3	Use the Launch Pad to update your connection profile with your newly migrated project and account information.
4	Resume the tasks indicated in the Getting Started folder within the online help.