

A Guide to the
Document Import
Interfaces into
KnowledgeTree

KnowledgeTree[®]

A Guide to the Document Import Interfaces into KnowledgeTree

Copyright © 2009 KnowledgeTree Inc.

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

This document is subject to change without notice.

License

This work is licensed under a Creative Commons Attribution 3.0 License.
<http://creativecommons.org/licenses/by/3.0/us/>



Disclaimer

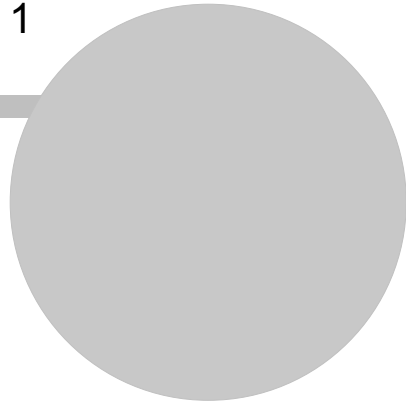
Documentation is provided "AS IS" and all express or implied conditions, representations, and warranties, including any implied warranty of merchantability, fitness for a particular purpose or non-infringement, are disclaimed, except to the extent that such disclaimers are held to be legally invalid.

Table of Contents

Part I Abstract	2
Part II The Document Import Interfaces	4

Abstract

Part ¹



1 Abstract

This white paper provides an overview of the available interfaces for importing documents into the KnowledgeTree repository.

Each of these document import methods serves a particular purpose – one or more are a best choice for specific tasks, while others are less efficient in some scenarios:

- single file upload through the Web interface
- zip file upload through the Web interface (bulk upload)
- import entire folder structures through the Web interface (import from server location - bulk import)
- drag and drop, using KnowledgeTree Tools
- persist, using KnowledgeTree Tools, from within Microsoft Office (XP/2003) applications
- drag and drop documents and folders, using KnowledgeTree Drop Box
- add new and edited documents (check-in) from within Microsoft Office 2007 applications, using KnowledgeTree Office Add-in
- bulk upload documents, including documents scanned to a network folder, using KnowledgeTree Hot Folders
- WebDAV
- KnowledgeTree Web Service

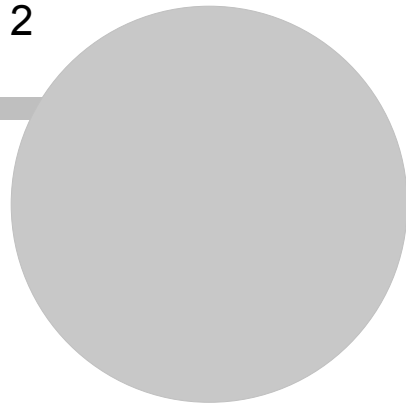
See Also:

A Guide to the Integration Interfaces into KnowledgeTree

Download PDF / view online from <http://www.knowledgetree.com/resources/documentation>

The Document Import Interfaces

Part ²



2 The Document Import Interfaces

The table below lists the available document import interfaces into KnowledgeTree and summarizes their different features, characteristics, advantages, and disadvantages:

<p>Web interface - single file upload</p> <p>Uploads a single document, from a local folder, to the currently selected folder within the repository.</p>	<p>Advantage</p>	<p>Suited to normal use cases, when working within KnowledgeTree's web interface.</p> <p>Allows the user to add document-specific metadata during upload.</p> <p>Provides access to all the functionality of the document management system, including advanced searches.</p>
	<p>Disadvantage</p>	<p>Not suitable for uploading a large number of documents.</p>
	<p>Availability</p>	<p>KnowledgeTree Commercial editions, KnowledgeTree Community edition</p>
	<p>Further reading</p>	<p>KnowledgeTree User Manual View Online / Download PDF</p>
<p>Web interface - zip file upload (Bulk Upload)</p> <p>Allows the upload of multiple documents in a zipped archive, from a specified local or network location.</p>	<p>Advantage</p>	<p>Retains the directory structure defined in the zip archive.</p> <p>Documents are indexed for searching.</p> <p>Useful for moving data off a remote client into the repository.</p>
	<p>Disadvantage</p>	<p>Does not allow automatic capture of document-specific metadata.</p> <p>Only supports client-side uploads (via KnowledgeTree's web interface).</p> <p>Documents must be zipped before uploading.</p>
	<p>Availability</p>	<p>KnowledgeTree Commercial editions, KnowledgeTree Community edition</p>
	<p>Further reading</p>	<p>Best Practice Guide to Bulk Uploads KnowledgeTree User Manual</p>

<p>Web interface - Import from server location (Bulk Import)</p> <p>Allows the upload of all documents and folders from a specified server location.</p>	<p>Advantage</p>	<p>Retains the directory structure defined on the server.</p> <p>Does not require that documents are archived (zipped) before uploading.</p>
	<p>Disadvantage</p>	<p>Does not allow automatic capture of document-specific metadata.</p> <p>Only supports uploading of documents that are accessible from the server.</p>
	<p>Availability</p>	<p>KnowledgeTree Commercial editions, KnowledgeTree Community edition</p>
	<p>Further reading</p>	<p>Best Practice Guide to Bulk Uploads</p> <p>KnowledgeTree User Manual View Online / Download PDF</p>
<p>Drag and Drop, using KnowledgeTree Tools</p> <p>Uses the WebDAV protocol to provide a familiar, Windows Explorer-type interface, known as KnowledgeTree Explorer</p> <p>KnowledgeTree Explorer mirrors the current state of the web-based KnowledgeTree repository, and allows users to interact with the KnowledgeTree server as though it were local.</p>	<p>Advantage</p>	<p>The familiar interface makes it easy to learn and to use.</p> <p>Allows users to interact directly with KnowledgeTree to perform the majority of tasks supported by the web interface, including:</p> <ul style="list-style-type: none"> • copy one or more files, or entire folder trees – using the operating system’s conventional drag and drop functionality – from the desktop directly into KnowledgeTree Explorer • move files and folders • browse repository content by navigating the folder structure • perform simple, free text searches • scan documents directly into KnowledgeTree, using the desktop imaging tool
	<p>Disadvantage</p>	<p>Only available for Microsoft Office Windows XP/2003 clients.</p> <p>Not suitable for bulk actions – e.g. uploading large numbers of files and folders to the repository. These actions are slow over WebDAV – preferably use the Web interface’s Bulk Import and Bulk Upload features, KnowledgeTree Drop Box, or</p>

		<p>KnowledgeTree Hot Folders.</p> <p>Does not allow sophisticated search.</p>
	Availability	KnowledgeTree Commercial editions
	Further reading	<p>KnowledgeTree Client Tools User Guide</p> <p>View Online / Download PDF</p>
<p>Persist, using the KnowledgeTree Tools Office plugin, from within Microsoft Office (2003)</p> <p>Using the WebDAV protocol and KnowledgeTree Web Service, allows users to save documents and emails directly to the repository, from within Microsoft Office XP/2003 applications, including Word, Outlook, PowerPoint, Excel, and Visio.</p>	Advantage	<p>Users can add or check-in currently open documents, from within the Microsoft Office 2003 application they're working in. This allows interaction with the web-based KnowledgeTree repository without having to leave your application to log in to the Web interface of the repository.</p> <p>Allows saving of emails and attachments from within Outlook to a predefined folder in the repository.</p>
	Disadvantage	<p>Only available for Microsoft Office Windows XP/2003 clients.</p> <p>Not suitable for bulk actions – only the currently open document is added or checked in to the repository.</p>
	Availability	KnowledgeTree Commercial editions
	Further reading	<p>KnowledgeTree Client Tools User Guide</p> <p>View Online / Download PDF</p>
<p>KnowledgeTree Drop Box</p> <p>Drag and drop documents and folders from your desktop into KnowledgeTree</p>	Advantage	Suitable for 'on-the-fly' uploads of documents and folders from your desktop.
	Disadvantage	<p>Destination 'save' location cannot be pre-defined. By default, documents and folders are uploaded to the user's Dropped Documents folder and must be manually moved to preferred locations in the KnowledgeTree repository.</p> <p>Note: A link to recently dropped documents and folders is provided in the Dropped Documents dashlet on the KnowledgeTree dashboard.</p>
	Availability	KnowledgeTree Commercial editions,

		KnowledgeTree Community edition
	Further reading	KnowledgeTree Client Tools User Guide View Online / Download PDF
<p>KnowledgeTree Office Add-in</p> <p>Add documents, download or check out documents for local viewing and/or editing, browse to or search for documents, email documents; Manage folders (add, rename, delete) - all from within the Microsoft Office 2007 interface - in Word, PowerPoint, or Excel</p>	Advantage	<p>Allows seamless document management experience from within Microsoft Office 2007 applications - PowerPoint, Word, Excel:</p> <ul style="list-style-type: none"> • add new documents • search and browse KnowledgeTree • open documents for viewing and editing within Microsoft Office 2007 (check in and check-out) • add documents, check in and check-out • email documents • view and edit document properties • manage folders
	Disadvantage	<p>Only available for Microsoft Office 2007 - PowerPoint, Excel, and Word</p> <p>Displayed file types in the Browse view are limited to file types supported by the application you're working in - i.e. to view PowerPoint files, you must be working in PowerPoint.</p> <p>Not suitable for bulk actions – only the currently open document is added or checked in to the repository.</p>
	Further reading	KnowledgeTree Client Tools User Guide View Online / Download PDF
<p>KnowledgeTree Hot Folders</p> <p>Facilitates bulk uploading of documents to the KnowledgeTree repository, including documents scanned to a network folder.</p> <p>KnowledgeTree Hot Folders monitors a designated local or network folder to upload documents. During upload, the tool auto-populates metadata fields in the repository, using information extracted from an XML</p>	Advantage	<p>Allows bulk uploads from any source (scanning, fax, manual file uploads), without having to interact directly with the KnowledgeTree system - i.e. through any of the Knowledge client tools, or the web interface.</p> <p>Useful in environments that produce a high volume of documents as part of the business process, including scanner applications.</p> <p>Auto-population of predefined metadata allows fast, efficient storage of files in the repository.</p>
	Disadvantage	Requires the creation of third party XML files to accompany each uploaded document.
	Availability	KnowledgeTree Commercial editions

<p>file that accompanies each uploaded document.</p> <p>XML files must comply with the KnowledgeTree Hot Folders XML Schema.</p>	<p>Further reading</p>	<p>KnowledgeTree Client Tools User Guide View Online / Download PDF KnowledgeTree Hot Folders Developer Guide</p>
<p>WebDAV</p> <p>The traditional protocol used by KnowledgeTree Client Tools for Windows – allows standard's-based WebDAV clients to access the KnowledgeTree repository.</p>	<p>Advantage</p>	<p>Enables actions such as 'drag and drop' from within WebDAV clients.</p>
	<p>Disadvantage</p>	<p>Supports a limited number of WebDAV clients. Only supports file-system related functions - i.e. does not allow add/view/edit metadata, check in/check out, view/edit properties.</p>
	<p>Availability</p>	<p>KnowledgeTree Commercial editions, KnowledgeTree Community edition</p>
	<p>Further reading</p>	<p>Third party client matrix for WebDAV (Wiki)</p>
<p>KnowledgeTree Web Service</p> <p>A mechanism that allows third party applications to interact directly with KnowledgeTree.</p>	<p>Advantage</p>	<p>Users are able to perform most typical document and folder actions from within external applications: add new documents and folders; check in/check out, move, copy, change properties, view history, manage workflows.</p>
	<p>Disadvantage</p>	<p>Does not support all document and folder actions available in the repository – e.g. permissions management, and administrative functions.</p>
	<p>Availability</p>	<p>KnowledgeTree Commercial editions, KnowledgeTree Community edition</p>
	<p>Further reading</p>	<p>The KnowledgeTree Web Service Guide – a tutorial on the Web Service Object Model</p>