power
DOCUMENTS
structure, archive and find your knowledge!

Your First Steps with powerDOCUMENTS

www.powerDOCUMENTS.com

Welcome to powerDOCUMENTS.

This document provides you with the First Steps for powerDOCUMENTS:

> Step 1

How to Login to powerDOCUMENTS?

>> Step 2

Description of different application windows in powerDOCUMENTS?

>>> Step 3
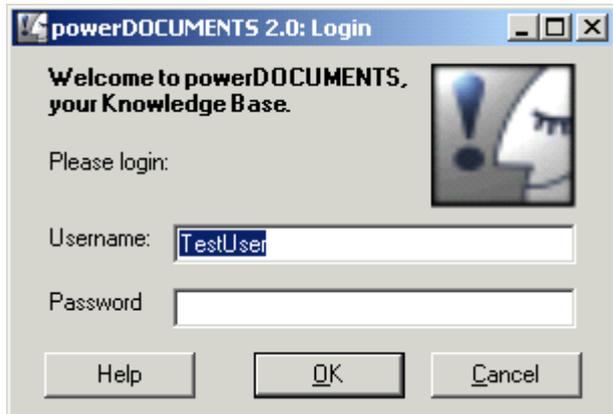
How to delete the supplied example?

>>>> Step 4

How to build your own individual knowledge retention solution?

> Step 1

How to Login to powerDOCUMENTS?

After starting the powerDOCUMENTS, the Login Window opens up.


Picture 1: Login Window

In the Free-Trial Version the Username is "TestUser" and the Password is an empty field. Just press the **OK** button to start. Otherwise, please type in the username and the password and then press **OK** to start working with the powerDOCUMENTS. You can **access** the already stored documents over its own integrated user administration facility. Using different **read, write** and **approve permissions**, usage can be defined according to the needs. Optionally, the user administration can be switched off, e.g. if only one desktop is in use.

It is therefore easy for you to create your own individual knowledge retention process with debriefers, experts, readers, administrators or a clearance process.

>> Step 2

Description of different application windows in powerDOCUMENTS?

Picture 2 explains the different areas of **the main application window**:
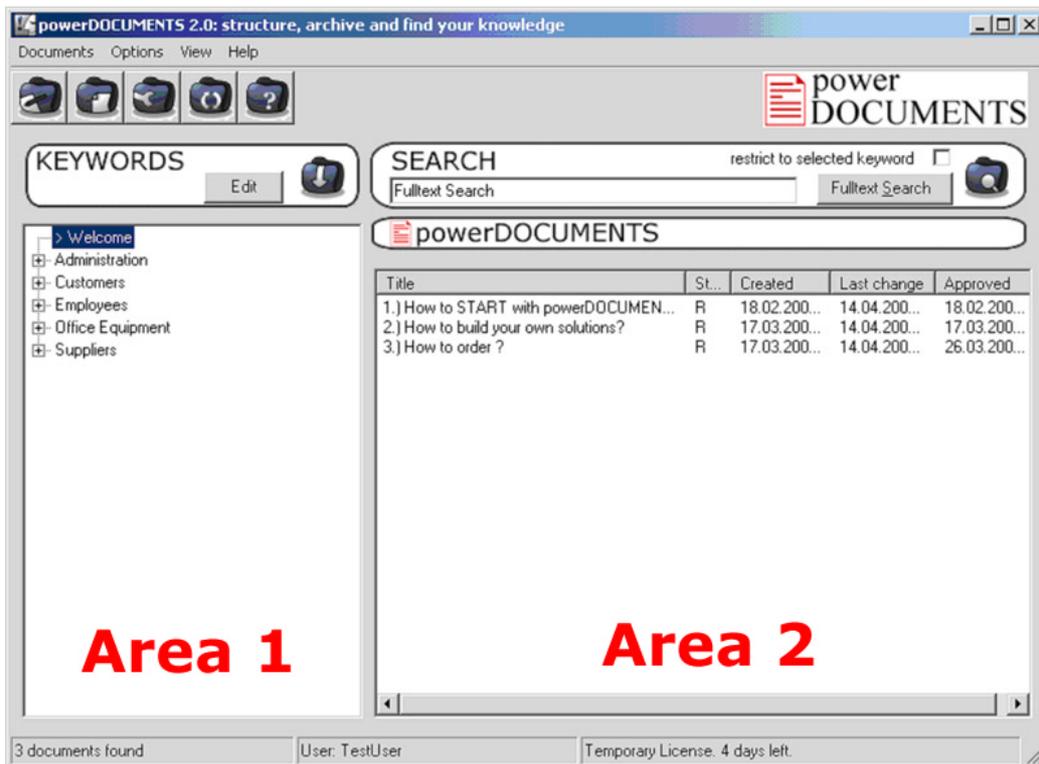
Picture 2: Main Application Window

Area 1 shows the actual hierarchical Search Keyword Tree. **Area 2** shows the related knowledge documents to the selected Search Keywords in **Area 1**.

A knowledge document can be related at the same time to more than one branches of a Search Keyword Tree.

**Picture 3** shows a detailed structure of the Search Keywords.
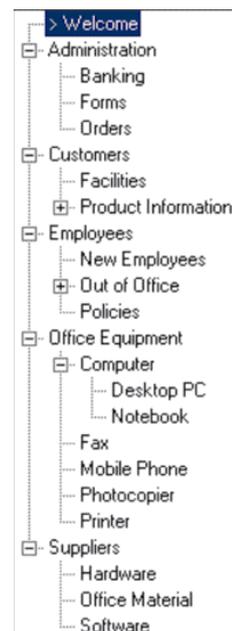
Picture 3: Search Keyword tree

Knowledge Document Window

Picture 4 shows you a knowledge document.

Area 4 on the left side of the screen, shows your user defined structure for knowledge documents. These fields are defined by the user as is required by her/him or the organisation. There can be up to 10 fields. In our example there are only four fields. Please note that once these fields are defined, they remain the same for the whole application.

In Area 3 on the right side of the screen you can see the user written contents of a knowledge document for the selected field of My Structure.
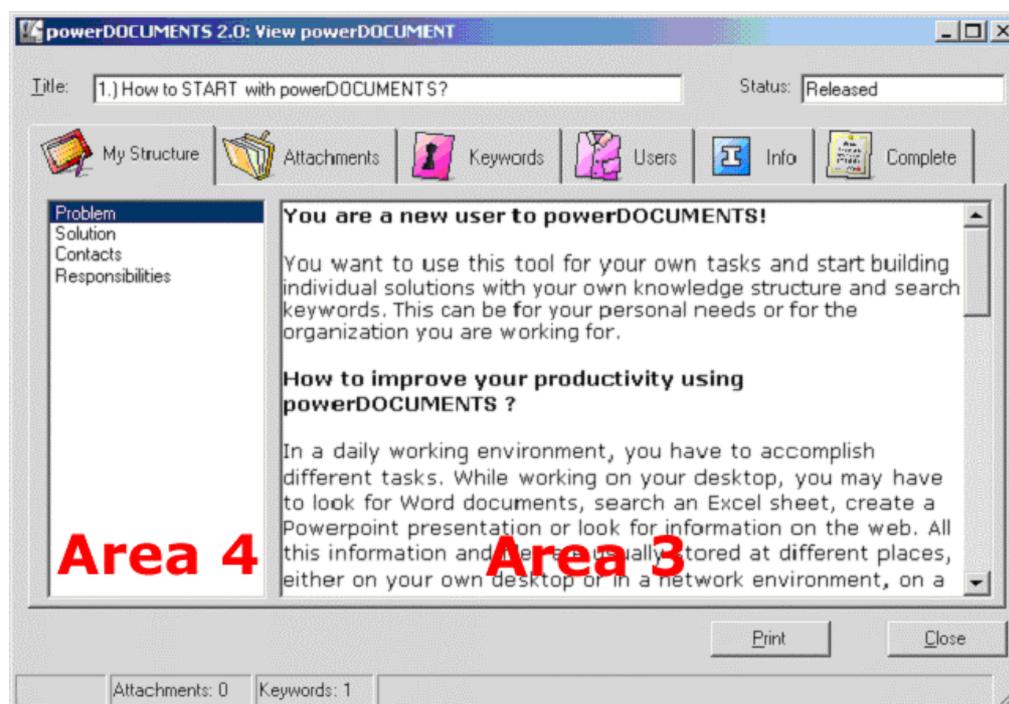
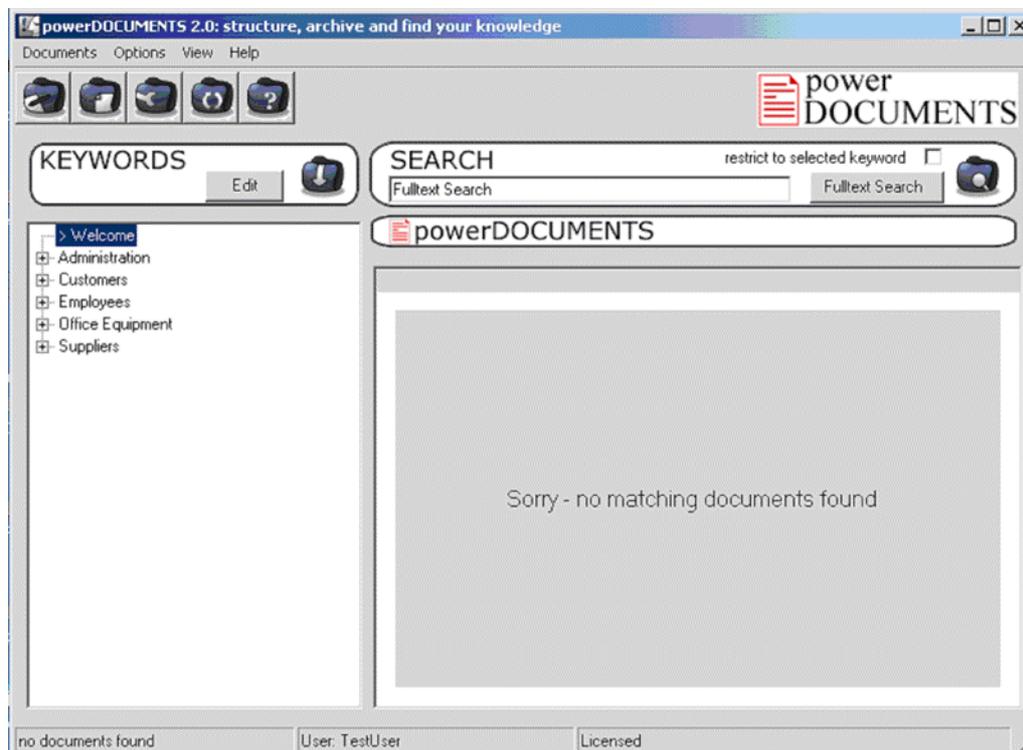**Picture 4: Knowledge Document Window**

The supplied example

We would recommend that you first get used to powerDOCUMENTS using the supplied example. You can make changes to the example to fully understand the scope of this application. You may add documents, you may delete some. You can add your own attachments or include web links in the existing knowledge documents. You can add your own Search Keywords on the left side of the main window. You can do text search using the Text Search facility. After getting familiar with the software, you can then delete the supplied example and build your own knowledge retention solution.

>>> Step 3

How to delete the supplied example?

Start deleting the knowledge documents one by one, displayed in Area 2 (see Picture 2) of the screen.

Mark the document. Press the right mouse click and then choose **Delete Doc**. Please repeat this procedure until all the supplied knowledge documents are deleted and you will see the following screen:

**Picture 5: Main Application Windows after deleting all documents for the selected keyword**

There is an easy way of listing all the knowledge documents used in our example at one time. Please use the Full Text Search of the words "supplied example" and all the documents will be listed. You can thus delete all the documents.

Please switch to **Area 1** on the screen and delete the supplied Search Keyword structure. Please press the **Edit** button and then press **Delete** to actually delete Search Keywords in the Search Keyword Tree Editor (see Picture 6 and Picture 3).
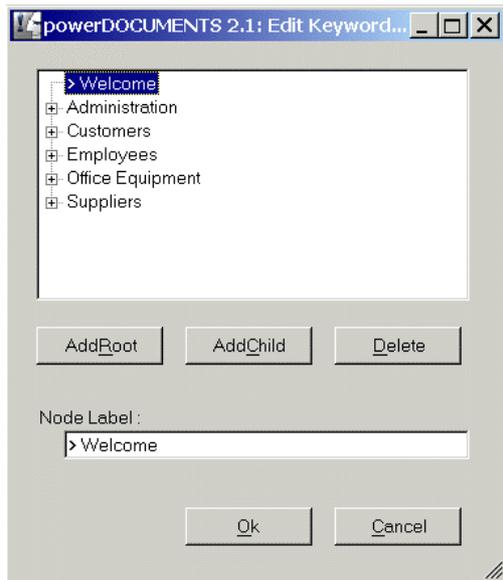
**Picture 6: Edit Search Keyword Tree Editor**

After you have deleted all the Search Keywords, following will be the state of your screen:
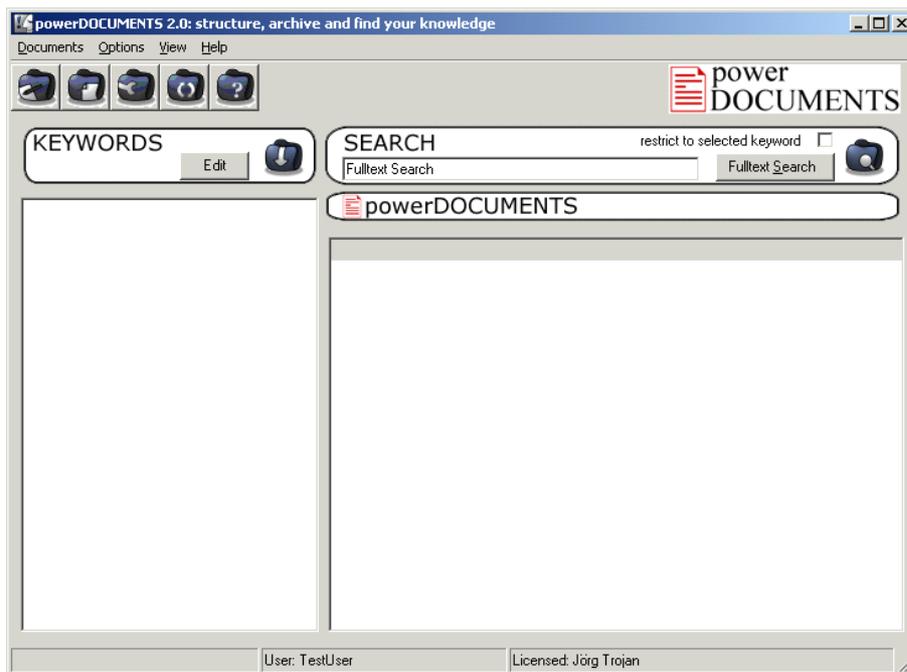
**Picture 7: powerDOCUMENTS is now empty**

My Structure <u>cannot</u> be deleted completely, as the application requires the **first user defined** field as a minimum. It is a **must** field.

To delete the supplied **My Structure**, press the **Options** from the pull down menu and then **Edit Configuration** function. You will see the following picture:
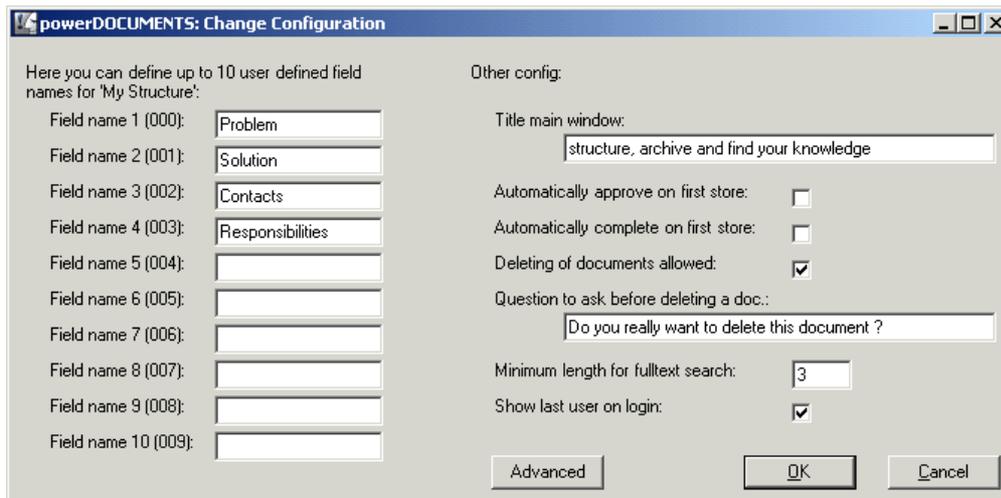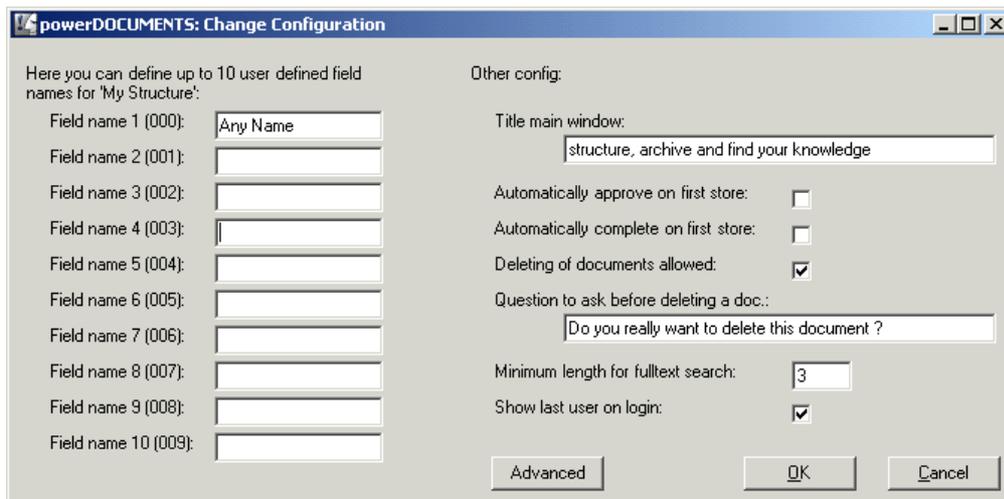

Picture 8: powerDOCUMENTS Configuration Window

Mark the first field (Picture 8) with the text "Problem" and replace it with any other name which you want to define, e.g. "Any Name" (Picture 9); as the application requires that the **first** field is **always** defined. It is a **must** field.
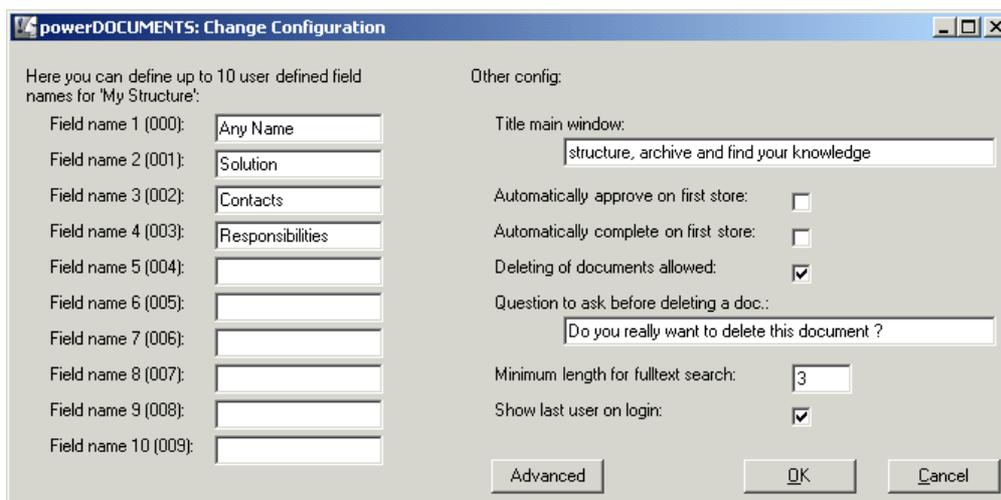
Picture 9: powerDOCUMENTS Configuration Window – Edit My Structure

Picture 10: powerDOCUMENTS Configuration Window – Edit My Structure

Now the rest of the fields can either be **marked** and **deleted**, or **replaced** by user defined field names. Up to 10 user defined fields can be added according to the individual needs and requirements.

After you have finished making the changes, press OK.
You will get the following message:

Picture 11: powerDOCUMENTS Configuration Window – Confirmation of Changes

Please press OK again, so that the changes are effective, and restart powerDOCUMENTS.

>>>> Step 4
How to build your own individual knowledge retention solution?

Now you can start building your own solution.

First, you have to decide which structure you want to have and how many user defined fields are going to be used. This structure will be valid throughout the application. This structure applies to **all** your knowledge documents.

To define those fields, press the **Option** button on the main window and then press **Edit Configuration**. You get the following window:

Picture 12: powerDOCUMENTS Configuration Window – Edit My Structure with one field

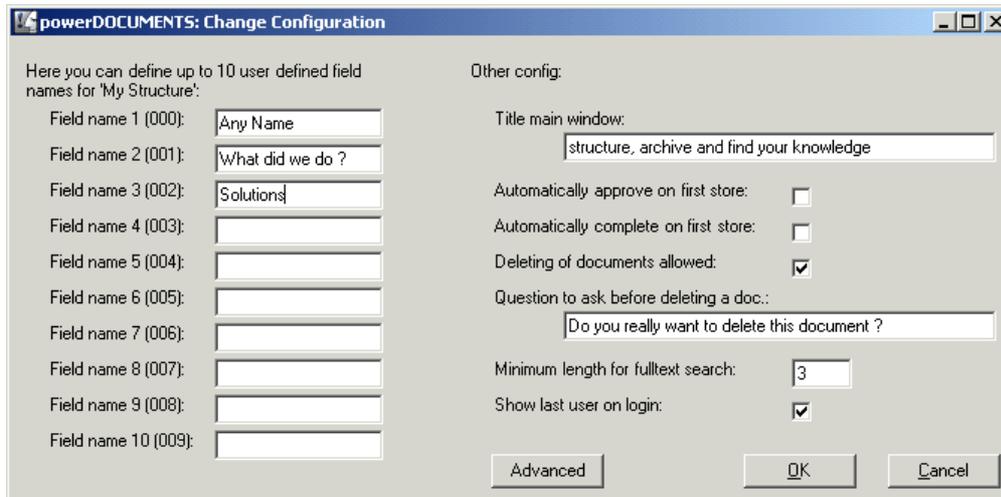Please add the necessary **fields** according your needs and requirements. **DON'T PRESS OK IF YOU STILL WANT TO ADD OTHER FIELDS**.
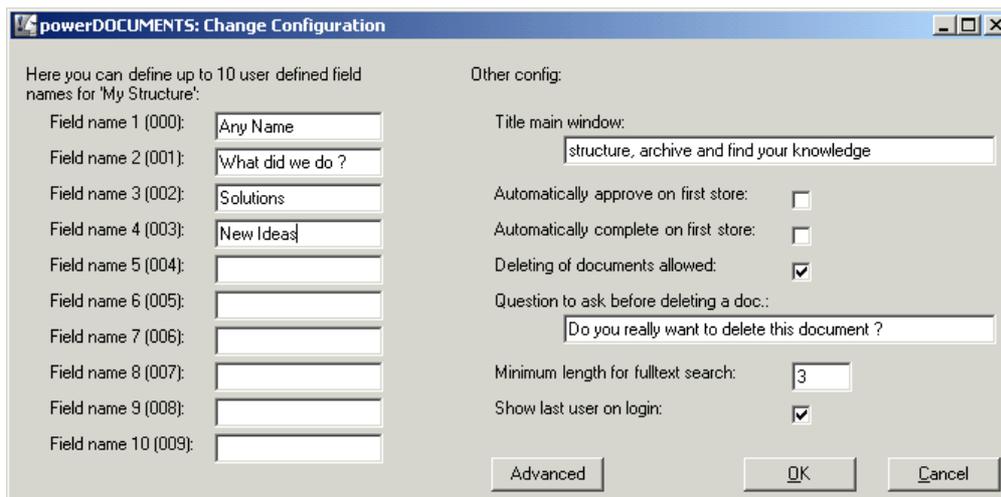

Picture 13: powerDOCUMENTS Configuration Window – Edit My Structure with two fields

Now we add a third one:

Picture 13: powerDOCUMENTS Configuration Window – Edit My Structure with three fields

Now we add a fourth one.

Picture 14: powerDOCUMENTS Configuration Window – Edit My Structure with four fields

We have now defined **four** fields in the configuration.

You can have up to **ten user defined** fields.

Now press OK.

You will get a message that changes will be effective when you start powerDOCUMENTS next time.
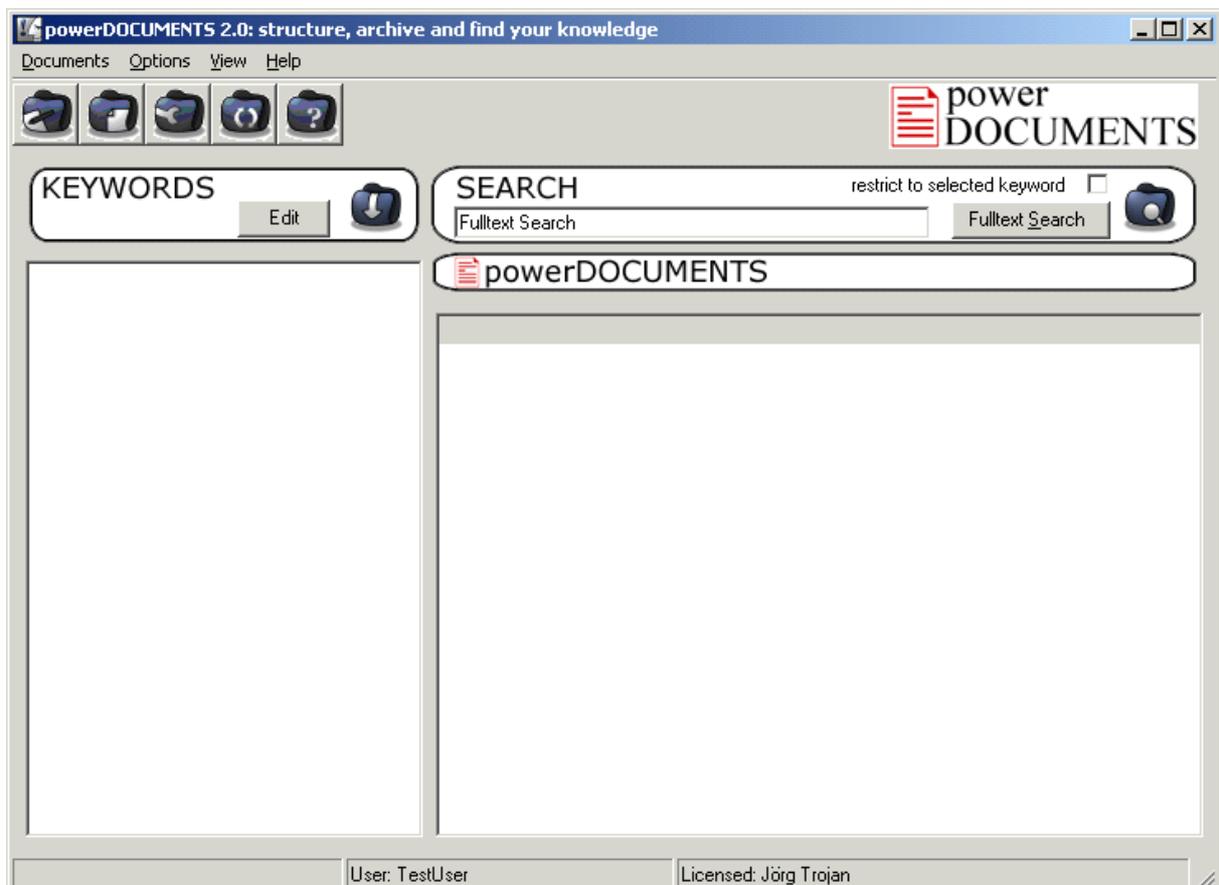

Picture 15: powerDOCUMENTS Configuration Window – Confirmation of Changes

Please press OK to change and save the configuration.

Please restart powerDOCUMENTS to keep building your knowledge retention solution.

After all the necessary fields have been defined, Search Keyword Tree can be added to the application.

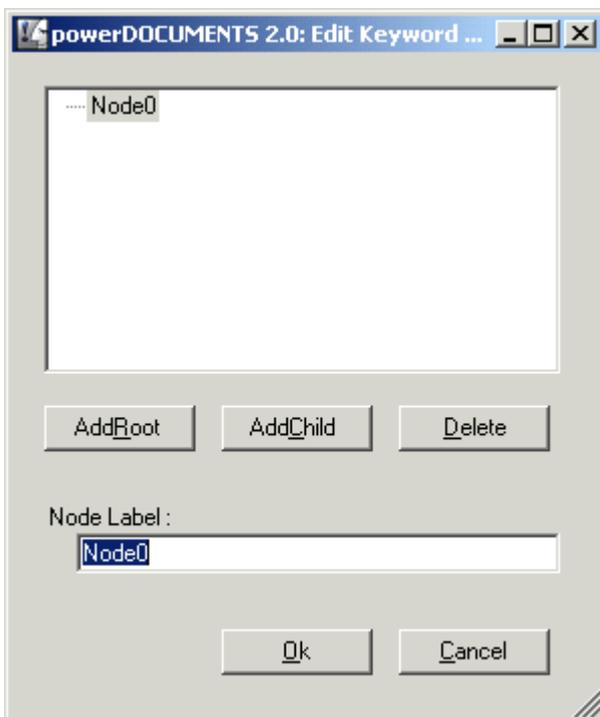Please Start with the following empty screen:

Picture 16: powerDOCUMENTS empty Main Application Window

Please click on the **Edit** button in the Keywords Area.
You will get the following screen:
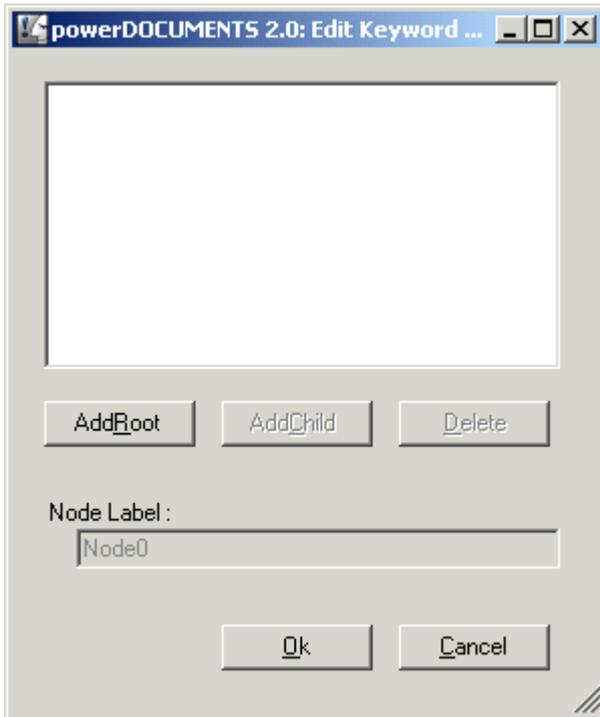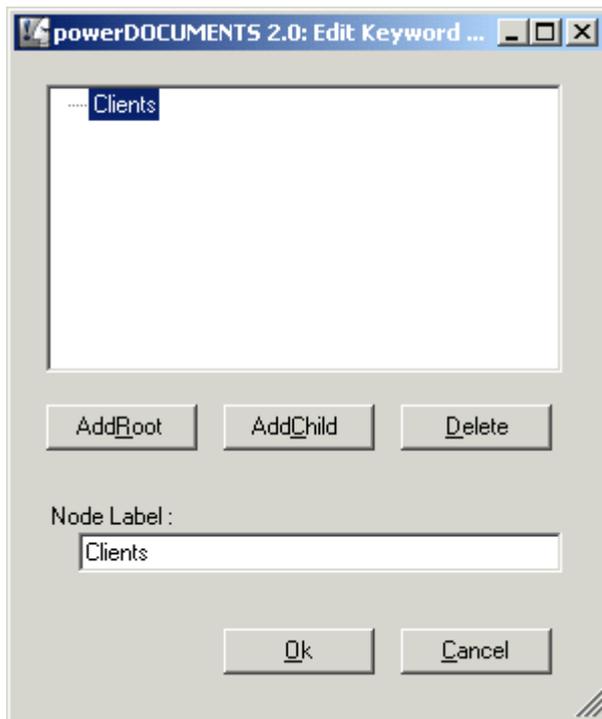
Picture 17: powerDOCUMENTS empty Keyword Editor

Please click on **AddRoot** to define the first Search Keyword.
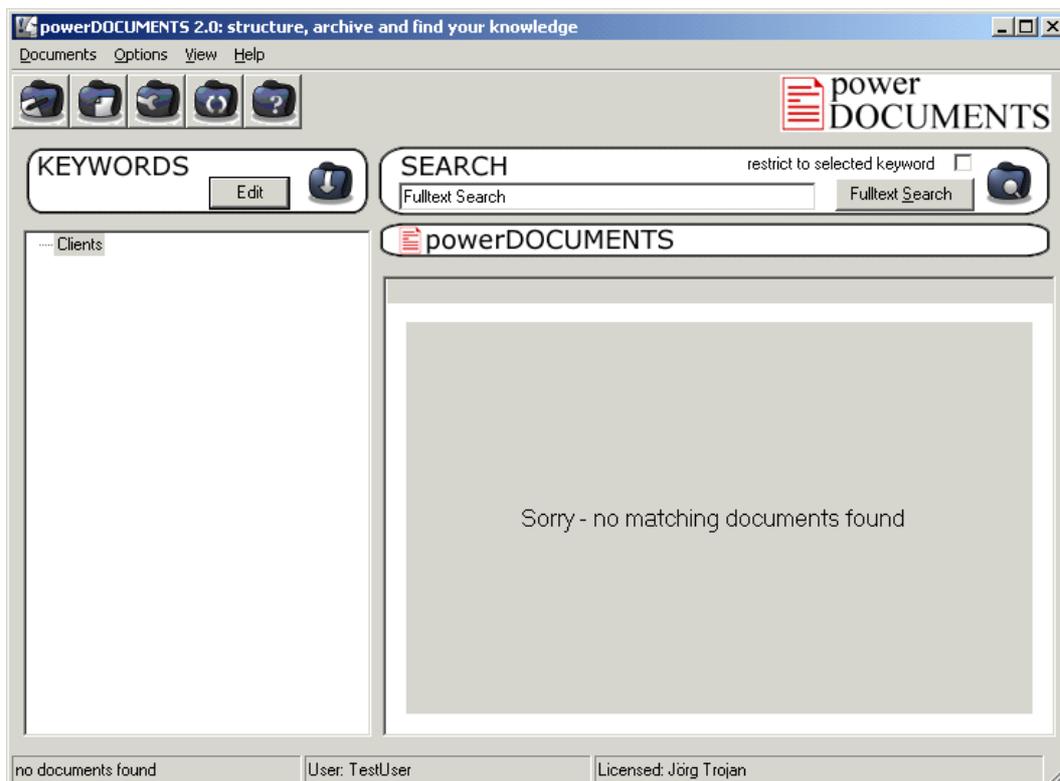The following screen will appear:

Picture 18: powerDOCUMENTS Keyword Editor with one root

Please type in e.g. Clients.

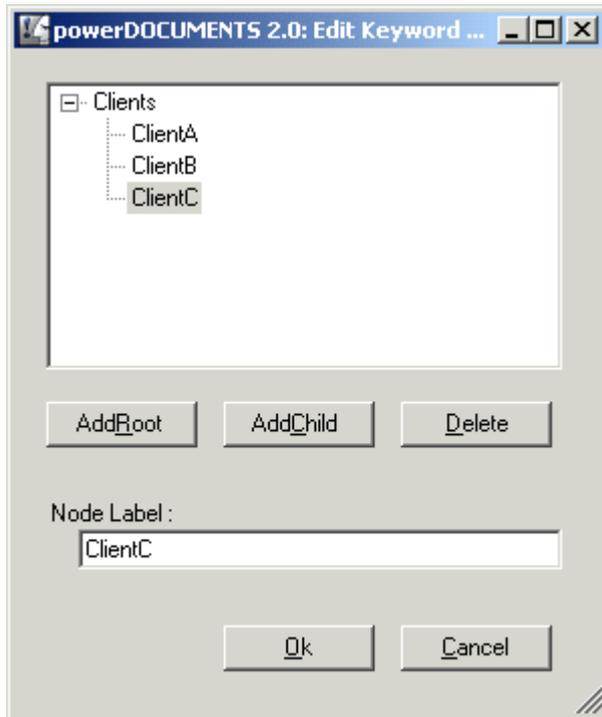**Picture 19: powerDOCUMENTS Keyword Editor with one root named 'Clients'**

Press OK and you will get the following screen:

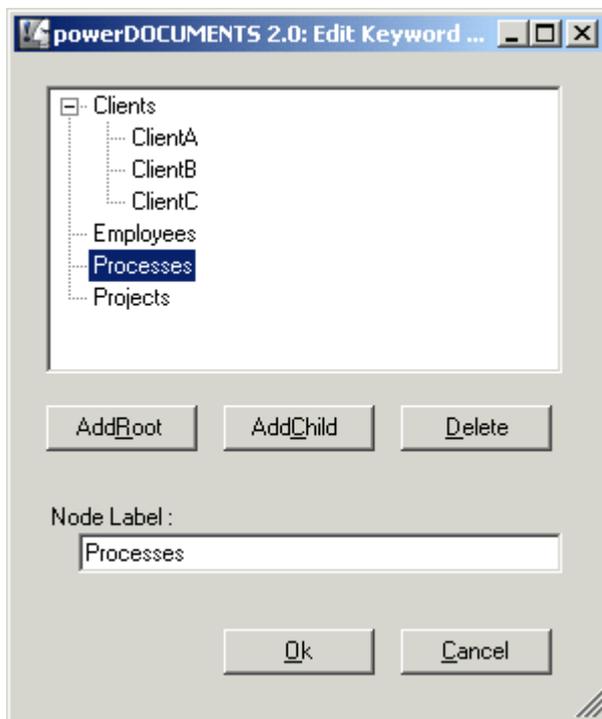**Picture 20: powerDOCUMENTS Main Application Window with one Search Keyword and no Knowledge Documents**

Please notice that a Search Keyword 'Clients' has been added on the left side of the screen (Picture 20). Now click again on **Edit** to add more Search Keywords or branches of the Tree structure. Click on **AddChild** to define branches or **AddRoot** to define Search Keywords.

Adding three branches will look like following:

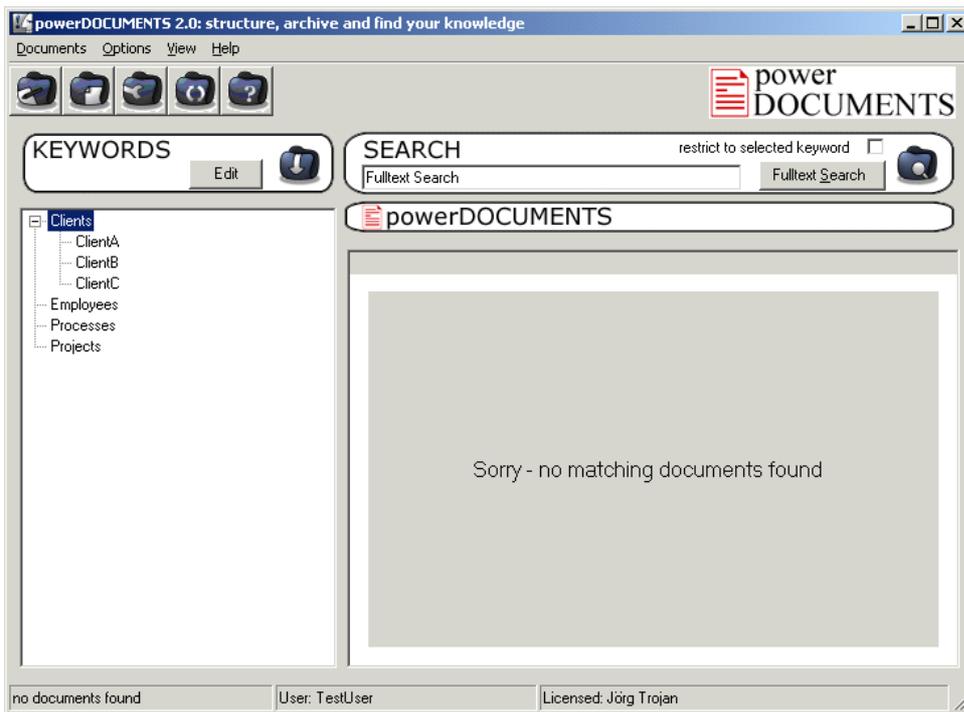**Picture 21: powerDOCUMENTS Keyword Editor with one root named 'Clients' and three branches**

Defining other Search Keywords may look like :

Picture 22: powerDOCUMENTS Keyword Editor with one root named 'Clients'

Press OK.

Your main window will now look something like this:

Picture 23: powerDOCUMENTS Main Application Window with five Search Keywords and no Knowledge Documents

This way you have defined Search Keywords on the left side of your window (see Picture 23).

After defining your Search Keyword Tree, you can create your first own knowledge document. You can either use the pull down menu "Documents > New powerDocument" or right mouse click to open a pop up Menu to create a new knowledge document:
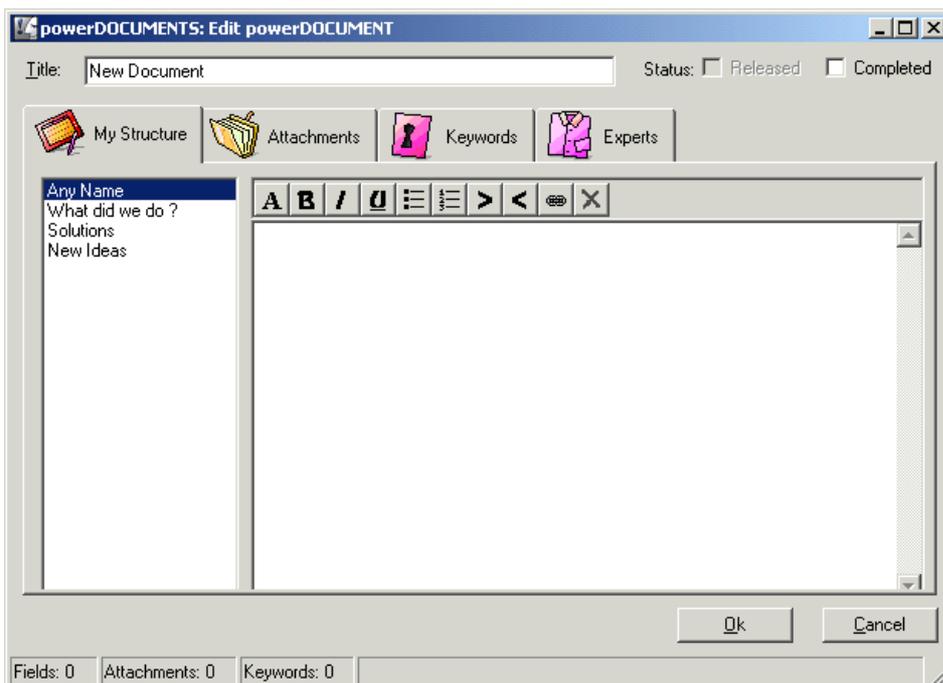
Picture 24: Knowledge Document Window with your individual My Structure fields

Please note the four **user defined fields** on the left side of the window which we had defined **earlier** (see Picture 24).

Now you can define a **title** for this knowledge document e.g 'My First Document' and fill in with your own text, add attachments and press **OK** to store the document. There are additional possibilities to add information using **Cut & Paste** and **Drag & Drop** methods.
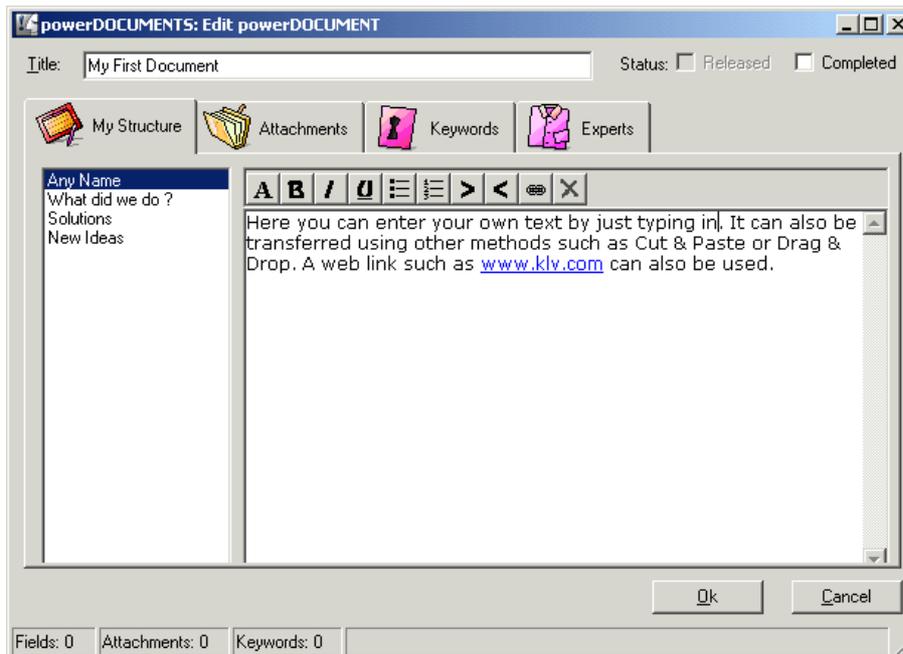
Picture 25: Knowledge Document Window with your individual My Structure fields and added information

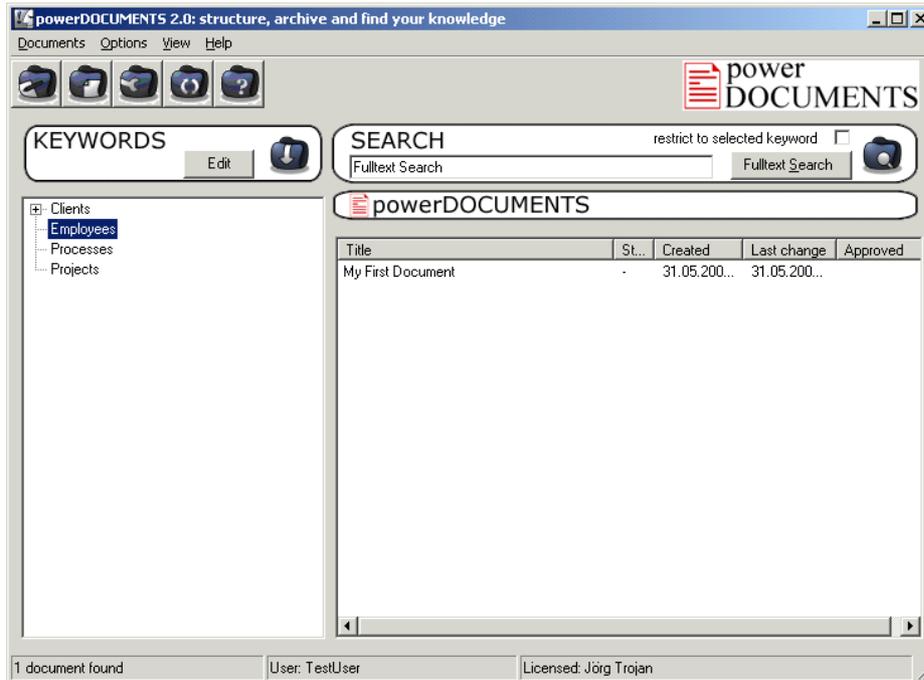After you press OK you will get the following main screen:
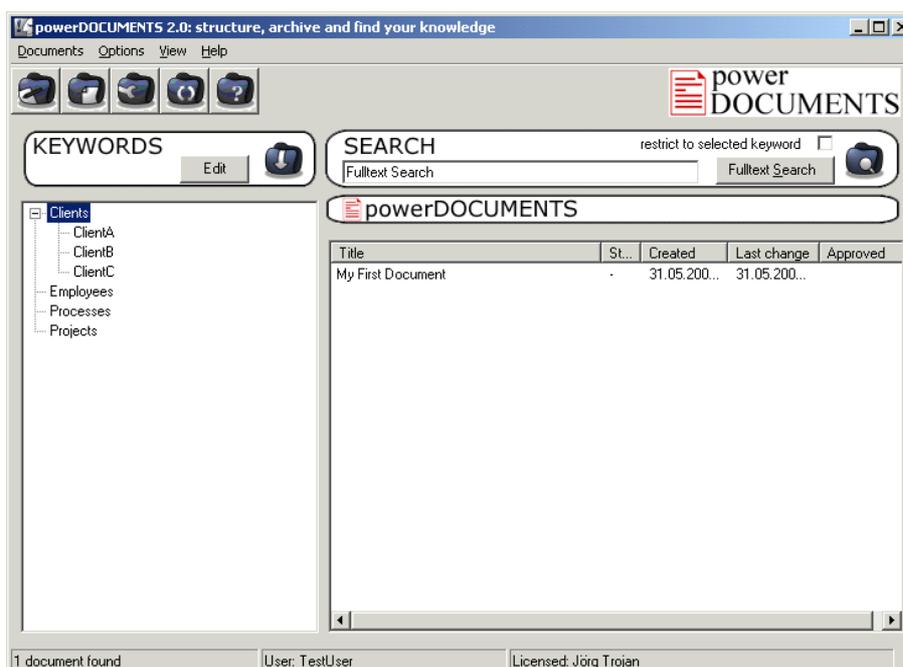
Picture 26: powerDOCUMENTS Main Application Window with your first knowledge document 'My First Document' related to the search keyword 'Clients'

On the right side of the screen, your knowledge document is listed and on the left side is your Search Keyword Tree (see Picture 26).

Please open the document again in the Edit mode and click on 'Keywords'. Mark "Employees" from the Search Keywords Tree and add it to "Keywords Associated" and press OK.
This document is now related to Search Keywords **Clients** and **Employees** but not to Processes or Projects.

Picture 27: powerDOCUMENTS Main Application Window with your first knowledge document 'My First Document' related to the search keyword 'Employees'
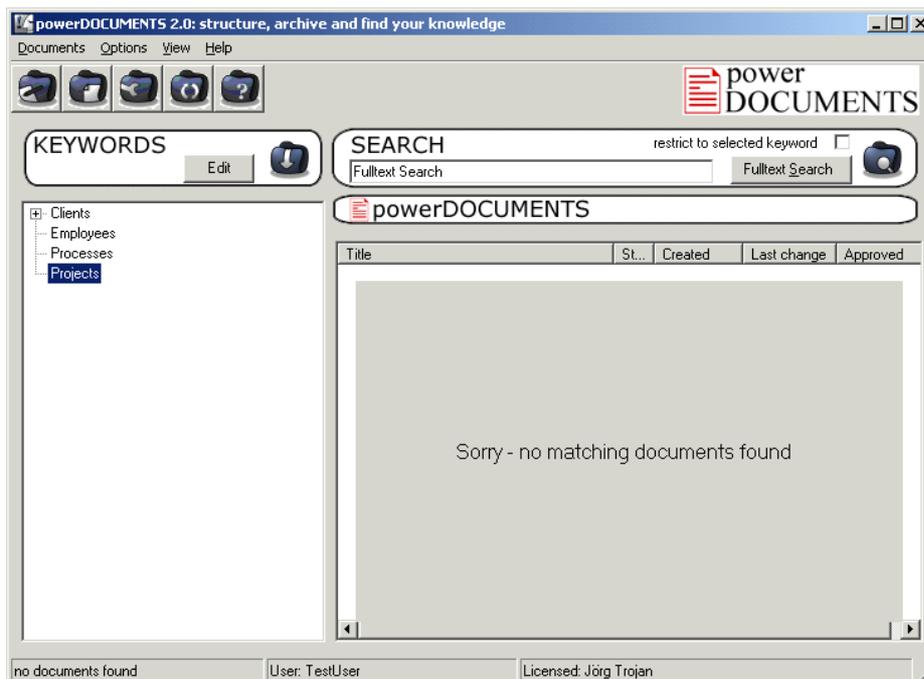
Picture 28: powerDOCUMENTS Main Application Window with the search keyword 'Projects' which contains no related knowledge documents

Now you can add further knowledge documents.

You can use two different ways to find knowledge in your knowledge base:

- Use the hierarchical Search Keyword Tree to navigate through your knowledge documents.

- Use the full text search to find knowledge documents which contain the search string.

If you need further assistance, please contact support@powerdocuments.com or visit the FAQ-Area on our website www.powerdocuments.com.

Thank you for going through first steps of
powerDOCUMENTS – Your Knowledge Retention Solution

You can also follow a live demonstration (5:30 min, flash) of powerDOCUMENTS at http://www.powerdocuments.com/livetour.htm