USER MANUAL

SmartKMS

Smart Knowledge Management System for Document Sharing and Resource Retrieval

For faculty, staff, researchers and administrators

Software version v2.0.0-beta.22 Manual edition 3.5 · November 21, 2026 University of La Salette

Document Information

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All names, email addresses and documents shown in this manual are demonstration data. Screens on your system may show your institution's own name, logo and colors.

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About This Manual

About SmartKMS

SmartKMS (Smart Knowledge Management System) is the university's web-based library for its own documents. Faculty, staff and administrators keep policies, memoranda, handbooks, forms, reports and research outputs in one place, and everyone can find what they need by describing it in plain language.

When you upload a document, SmartKMS reads it, writes a short summary, suggests topic tags and makes it searchable by meaning. The **Q&A Assistant** answers questions using only the documents you are allowed to see, and shows which documents each answer came from. Every document has a visibility setting, so you decide who can find and open it.

All artificial intelligence (AI) processing runs on the university's own server. Your documents are never sent to an outside AI service.

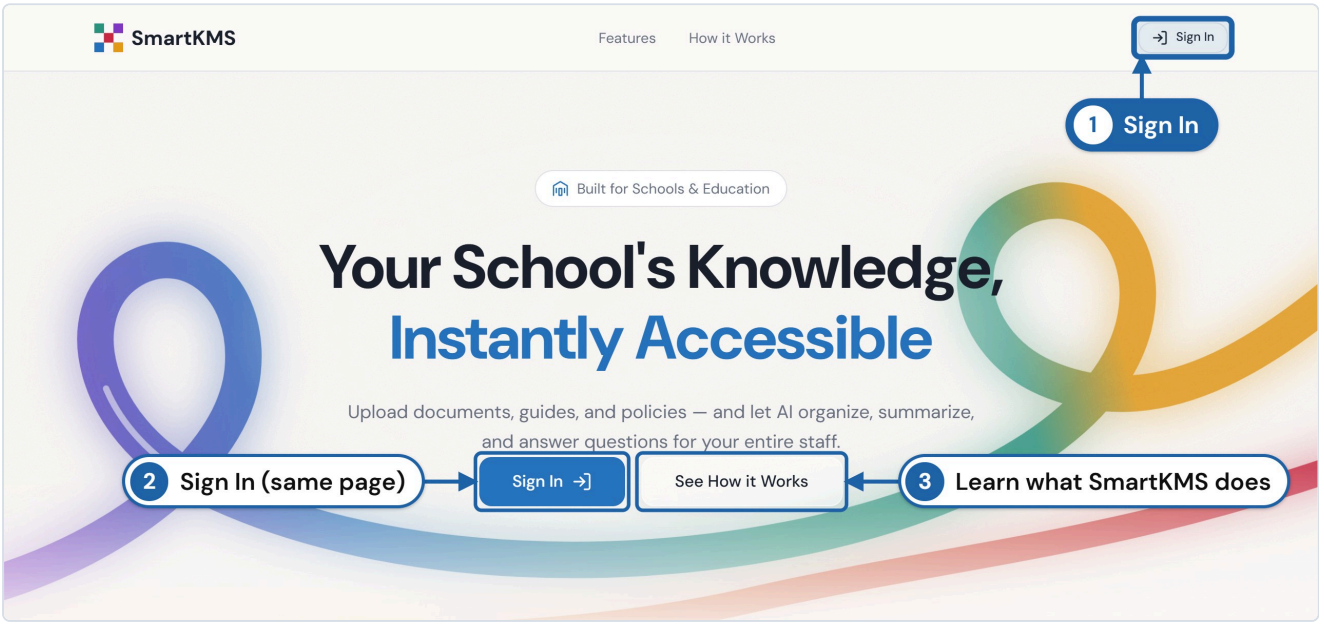


Figure 1. The SmartKMS home page. Both **Sign In** buttons open the sign-in page.

How to Use This Manual

Start with section 1.1, Quick Start (page 8). It takes about ten minutes and covers what most people do every day. After that, use the contents page or the role guide in section 1.7, Roles: What You Can Do (page 16) to go straight to the task you need.

The chapters follow what you want to do: find information, add documents, share them, keep them organized, and recover them. Tasks for staff and administrators are in their own chapters, marked *Applies to*.

Text conventions

- **Bold** text is a button, menu item, field or page name, exactly as it appears on screen. Example: click **Browse Files**.
- `Monospace` text is something you type, a file name or an address. Example: type `faculty@cit.edu`.
- **A → B** means open menu A, then choose B. Example: **File → Download**.
- Keys look like this: Enter, Shift + Enter.
- A link to another part of the manual gives its page number, for example section 9.2, Changing Your Password (page 66).

Note boxes

> **NOTE**
> Extra information that helps you understand a feature.

> **TIP**
> A quicker way to do something, or a good habit.

> **IMPORTANT**
> Something you must know or do for the task to work.

> **WARNING**
> Something that can lose your work, expose information, or can't be undone.

Reading the screenshots

Screenshots have numbered blue labels that point at the part of the screen they name. When a screenshot has four or more labels, a table under it explains each number. The action that completes a task, such as **Sign In** or **Share**, has a filled label and a thicker outline.

The screenshots show demonstration data in light mode. Your screens may show your institution's logo, colors and documents, and only the menu items your role allows.

CHAPTER 1

Get Started

This chapter gets you signed in and shows you around. You need a web browser and the account details your administrator gave you; there is nothing to install. The full requirements are in Appendix D, System Requirements (page 80).

1.1 Quick Start

These five steps take about ten minutes. They match the **Getting started** checklist in SmartKMS (section 1.5, The Getting Started Checklist (page 14)).

To start using SmartKMS

Before you start: the SmartKMS address, your email address and a temporary password, all from your administrator.

1. **Sign in.** Open the SmartKMS address in your browser, accept the Terms & Conditions, sign in, and change your temporary password. See section 1.2, Signing In for the First Time (page 8).
   > **Result:** Your Dashboard opens.
2. **Look around.** The menu on the left opens every part of SmartKMS. See section 1.3, Finding Your Way Around (page 11).
3. **Find a document.** Click **AI Search**, type what you're looking for in your own words, and press Enter. See section 2.1, Searching with AI Search (page 17).
   > **Result:** The documents that match best are listed first.
4. **Ask a question.** Click **Q&A Assistant**, type a question, and press Enter. See section 2.4, Asking the Q&A Assistant (page 20).
   > **Result:** An answer appears, with the documents it came from listed underneath.
5. **Upload and share a document** (Faculty, Staff and Administrators). Click **Documents**, drop a file on the upload area, then choose who can see it. See section 3.1, Uploading Documents (page 25) and section 4.1, Who Can See a Document (page 32).
   > **Result:** The document is searchable within about a minute, by the people you chose.

1.2 Signing In for the First Time

The first time you open the sign-in page in a browser, SmartKMS asks you to read and accept its Terms & Conditions. You then sign in with the email address and temporary password your administrator gave you, and change the password.

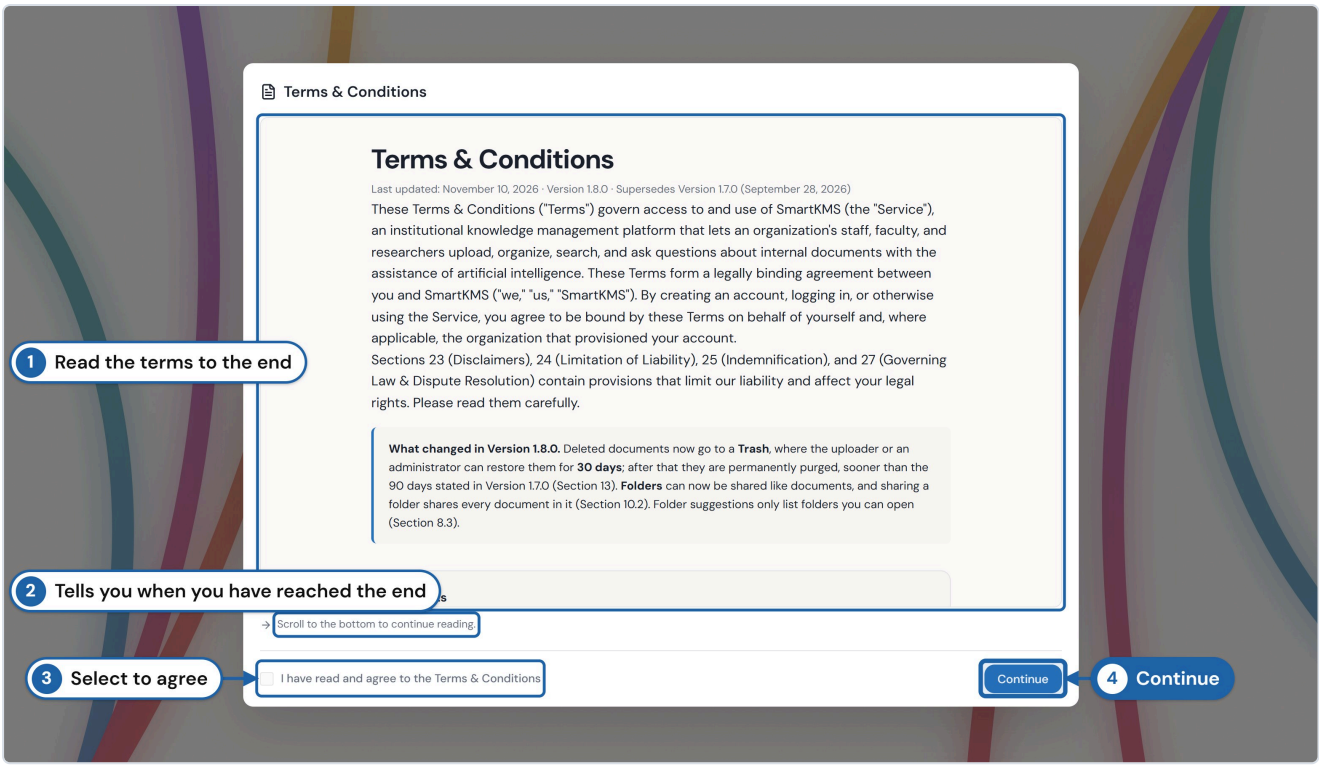


Figure 2. The Terms & Conditions window shown before your first sign-in

No.	Item	What it does
1	Terms text	The full Terms & Conditions. Scroll inside this area to read them.
2	Reading hint	Says *Scroll to the bottom to continue reading.* It changes to a check mark when you reach the end.
3	**I have read and agree to the Terms & Conditions**	Select it to accept. It becomes available only after you reach the end of the terms.
4	**Continue**	Closes the window and shows the sign-in form.

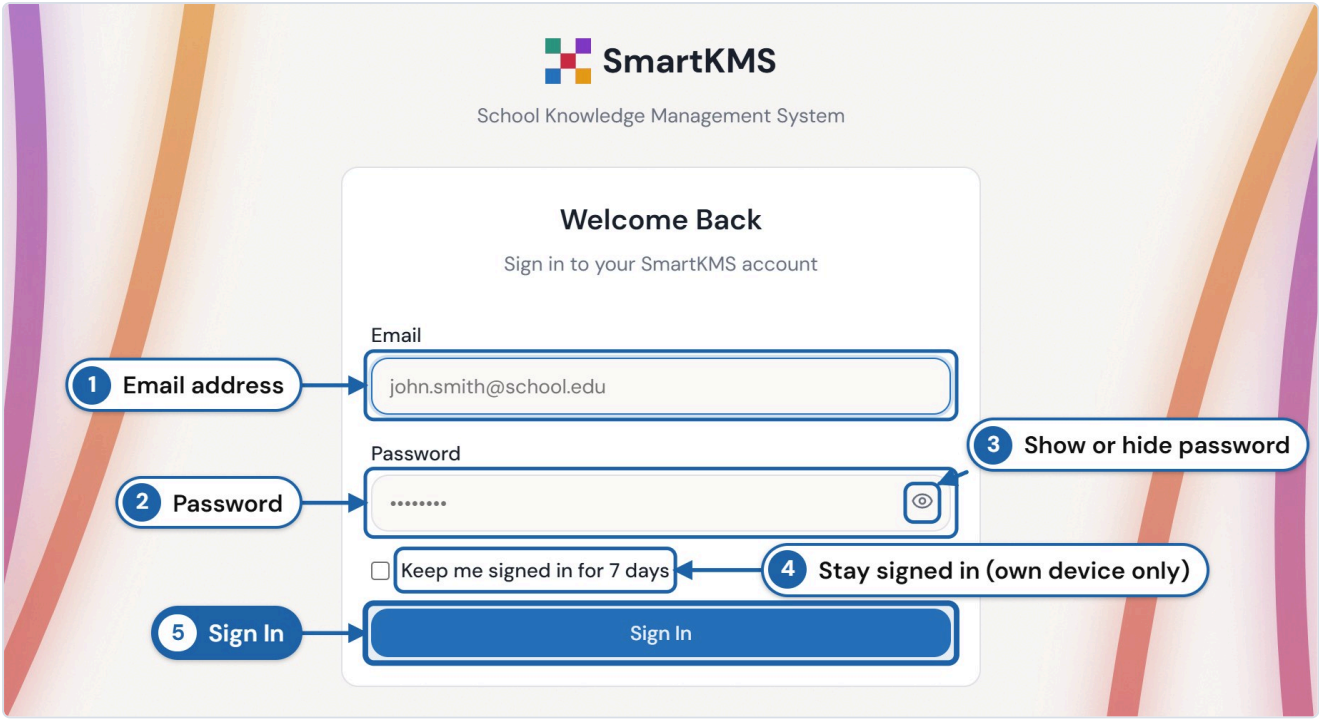


Figure 3. The sign-in form

No.	Item	What it does
1	**Email**	Your SmartKMS email address. Capital letters don't matter.
2	**Password**	Your password. Capital letters do matter.
3	Eye icon	Shows or hides the password, so you can check what you typed.
4	**Keep me signed in for 7 days**	Keeps you signed in after you close the browser, for up to 7 days. Leave it cleared on shared computers.
5	**Sign In**	Signs you in and opens your Dashboard.

To sign in for the first time

Before you start: the SmartKMS address, your email address and temporary password from your administrator, and a supported browser.

1. Type the SmartKMS address (for example `https://kms.your-school.edu`) in your browser's address bar, press Enter, and click **Sign In**.
   > **Result:** The Terms & Conditions window opens (Figure 2 (page 9)).
2. Scroll inside the window to the end of the terms.
   > **Result:** The hint below the terms changes to *Thanks — you can check the box below to continue.*
3. Select **I have read and agree to the Terms & Conditions**, then click **Continue**.
   > **Result:** The sign-in form is ready (Figure 3 (page 10)).
4. Type your email address and your temporary password. On your own device, select **Keep me signed in for 7 days** if you like.

5. Click **Sign In**, or press Enter.
   > **Result:** Your Dashboard opens with *Welcome back,* and your first name.
6. Change your temporary password straight away (see section 9.2, Changing Your Password (page 66)).
   > **Result:** A message says *Password updated.*
7. Bookmark the page, so you can come back quickly.

TIP

If your institution has turned on Microsoft or Google sign-in, the sign-in page also shows **Sign in with Microsoft** or **Sign in with Google**. Use it to sign in with your school Microsoft 365 or Google Workspace account instead of a SmartKMS password.

NOTE

You accept the terms once per browser. They appear again in another browser or device, after you clear your browser data, and when the terms are updated.

WARNING

After five wrong passwords in a row, your account is locked for 15 minutes. Check that Caps Lock is off, and use the eye icon to check what you typed.

If sign-in shows a message, look it up in section 10.2, Messages and What They Mean (page 69). Other sign-in problems:

Problem	Solution
Continue can't be clicked, or the reading hint turns red and shakes	Scroll inside the terms to the very end, then select the checkbox.
I'm asked to sign in again every day	Select **Keep me signed in for 7 days** when you sign in on your own device. Some browsers also clear cookies when they close.
I forgot my password	SmartKMS has no "forgot password" email. Ask your administrator (see section 9.2, Changing Your Password (page 66)).

1.3 Finding Your Way Around

The **Dashboard** is the first page you see after signing in. It has shortcuts to the main tasks, a few usage figures for your organization, and your most recent documents and conversations.

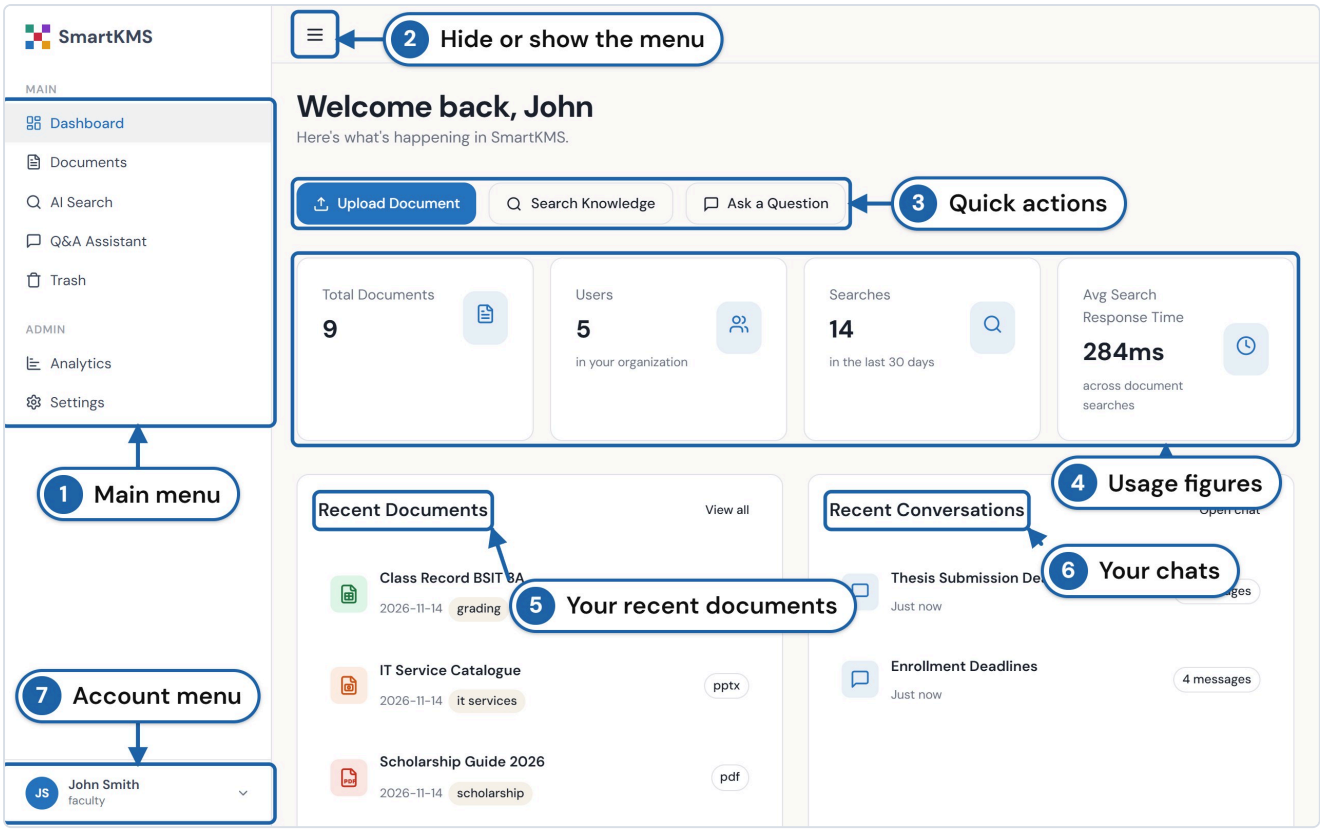


Figure 4. The Dashboard for a faculty member

No.	Item	What it does
1	Main menu	Opens each part of SmartKMS. The items depend on your role (see the table below).
2	Menu button	Shrinks the menu to its icons, to give the page more room. Point at an icon to see its name.
3	Quick actions	**Upload Document**, **Search Knowledge** and **Ask a Question**. Researchers don't see **Upload Document**.
4	Usage figures	Documents and active users in your organization, searches in the last 30 days, and the average search time. Researchers see one card: the documents available to them. A figure shows — until there is data.
5	**Recent Documents**	Your five most recent documents. Click one to preview it.
6	**Recent Conversations**	Your latest Q&A Assistant conversations. Click one to continue it.
7	Account menu	Your name and role. Click for Help and **Log out** (see section 1.4, The Account Menu and Logging Out (page 13)).

The menu has two groups. **Main** holds the pages everyone uses; **Admin** holds settings and, depending on your role, review and management pages. If a menu item described in this manual is missing, your role doesn't include it.

Menu item	What it's for	Who sees it
Dashboard	Shortcuts and recent items	Everyone
Documents	Browse, upload and share documents (Chapter 3, Add and Work with Documents (page 24))	Everyone. Researchers can only view.
AI Search	Find documents by meaning (section 2.1, Searching with AI Search (page 17))	Everyone
Q&A Assistant	Ask questions about documents (section 2.4, Asking the Q&A Assistant (page 20))	Everyone
Archive	Outdated documents you archived, and retrieving them (section 6.1, Archiving Outdated Documents (page 42))	Faculty, Staff, Administrators
Trash	Deleted documents, restorable for 30 days (section 6.3, Restoring Documents from the Trash (page 44))	Faculty, Staff, Administrators
Reapprovals	Requests to review rejected documents (section 7.4, Reviewing Reapproval Requests (page 50))	Staff, Administrators
Analytics	What your organization searches for (section 5.4, Seeing What People Search For (page 39))	Faculty, Staff, Administrators
Activity Log	The record of actions (section 8.5, Reading the Activity Log (page 61))	Administrators
Users	Accounts and roles (section 8.1, Managing Users (page 54))	Administrators
Settings	Your profile and display (Chapter 9, Your Account and Settings (page 65)); organizations and branding for administrators	Everyone

1.4 The Account Menu and Logging Out

Your name and role appear at the bottom of the menu. Click them to open the account menu.

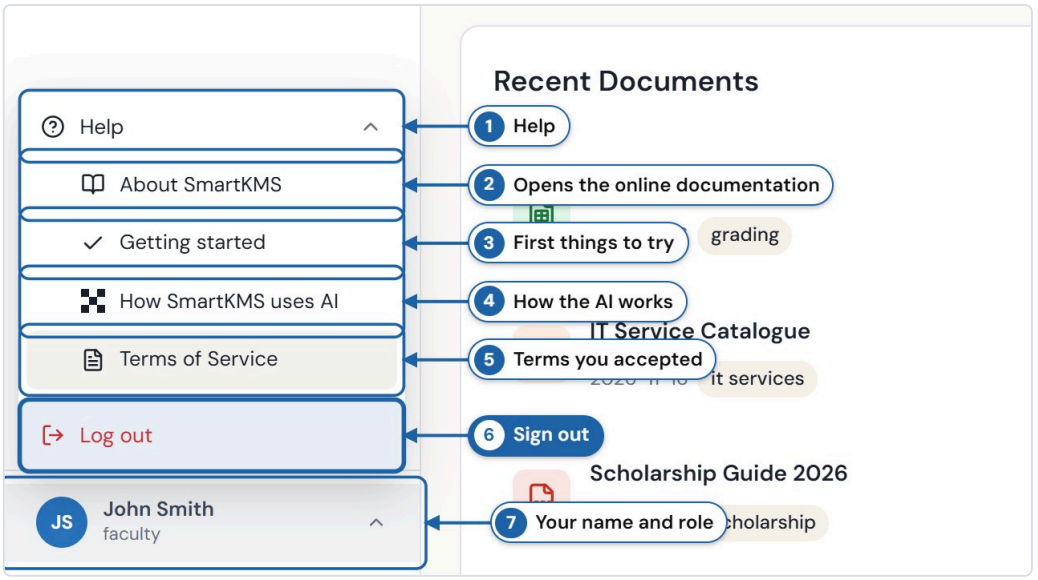


Figure 5. The account menu, with **Help** expanded

No.	Item	What it does
1	**Help**	Shows or hides the four help links below it.
2	**About SmartKMS**	Opens the online documentation in a new tab.
3	**Getting started**	A checklist of first things to try (see section 1.5, The Getting Started Checklist (page 14)).
4	**How SmartKMS uses AI**	What each AI feature does, the model behind it, what it sees, what it can get wrong and where people decide.
5	**Terms of Service**	Shows the Terms & Conditions you accepted.
6	**Log out**	Signs you out after you confirm.
7	Your name and role	Opens and closes this menu.

To log out

1. Click your name at the bottom of the menu, then click **Log out**.
2. Confirm.

   Result: You are signed out and returned to the sign-in page.

IMPORTANT

Always log out on a shared or public computer. Closing the browser also signs you out, unless you selected **Keep me signed in for 7 days**.

1.5 The Getting Started Checklist

Help → Getting started in the account menu lists the first things to try, each with a button that takes you where you do it. Steps such as uploading a document or asking the Q&A Assistant a question are checked off automatically once you have done them; you check off the others yourself

by clicking the circle. Researchers don't see the upload step.

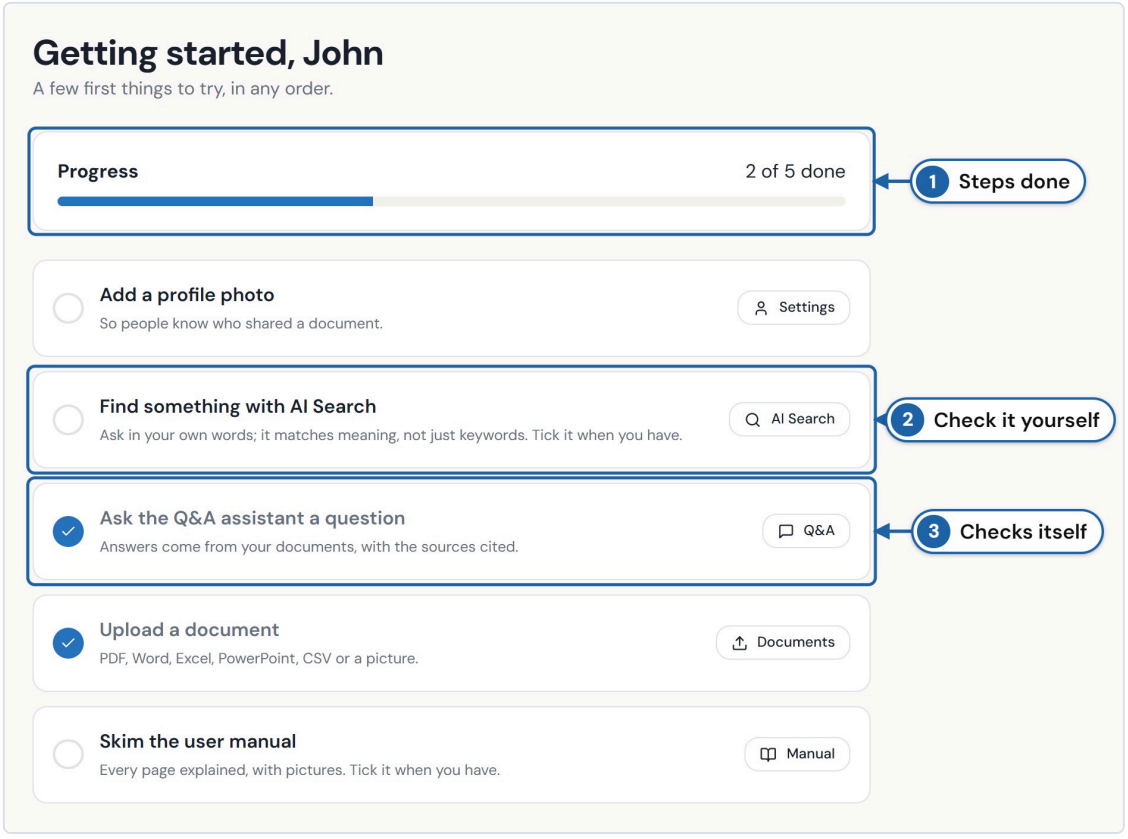


Figure 6. The Getting started checklist

1.6 Using SmartKMS on a Phone or Tablet

On narrow screens the menu is hidden behind the menu button at the top left. Tap a page to open it, or tap outside the menu to close it. A document preview fills the whole screen on a phone; scroll to read it and close it with ×.

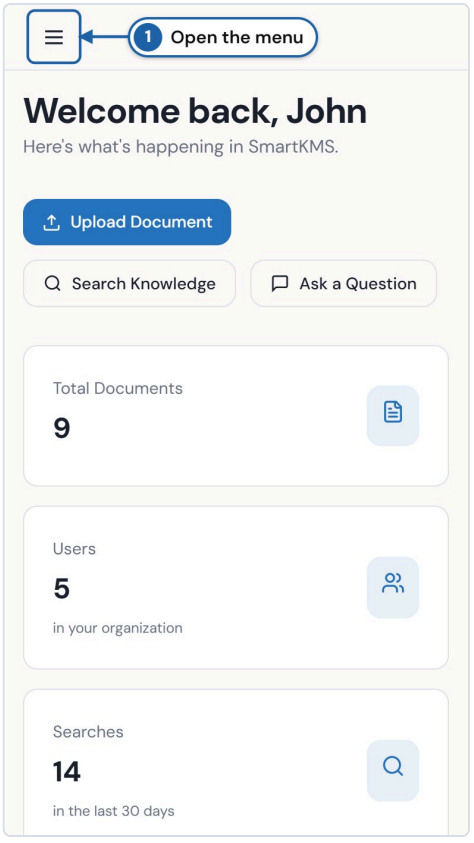


Figure 7. On a phone, the menu is behind the menu button

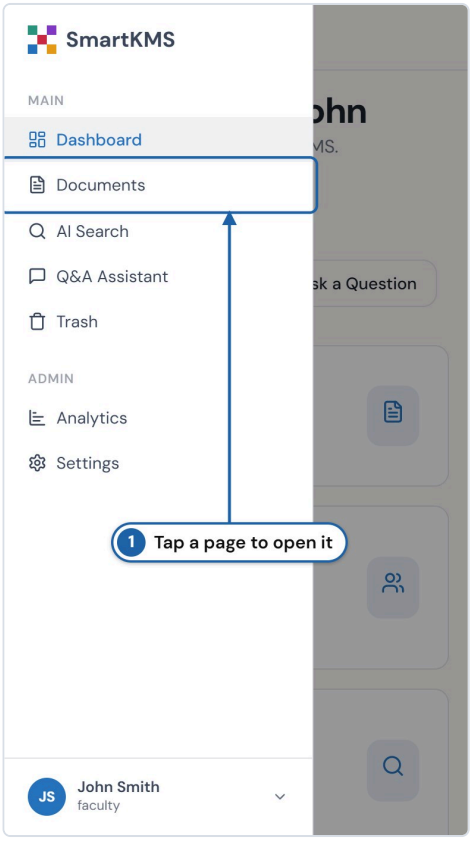


Figure 8. The menu open on a phone

1.7 Roles: What You Can Do

Every account has one role, set by your administrator. Each role can do everything the role above it can, plus more. The full list is in Appendix B, Role Matrix (page 77).

Your role	What you can do	Start with
Researcher	Find and open the documents shared with you; use AI Search and the Q&A Assistant. You can't upload.	Chapter 2, Find Information (page 17)
Faculty	Also upload documents; share, edit, rename and delete your own; create and share folders in your organization; restore your own documents from the Trash; view your organization's analytics.	Chapter 3, Add and Work with Documents (page 24) and Chapter 4, Share and Control Access (page 32)
Staff	Also edit any document in your organization, and review requests about rejected documents in your organization.	Chapter 7, Review Documents (page 46)
Administrator	Everything, in every organization: approve and reject documents, manage users, organizations and branding, and read the Activity Log.	Chapter 8, Administer SmartKMS (page 54)

The person who installs and runs the server (the *server administrator*) should also read Appendix G, Server Administration (page 83). If you need a different role, ask your administrator.

CHAPTER 2

Find Information

SmartKMS gives you three ways to find what you need:

- **AI Search** when you know the subject but not the document's name.
- The **Q&A Assistant** when you want a direct answer, with the documents it came from.
- The **Documents** page when you know the document's name.

All three only show documents you are allowed to see (section 4.1, Who Can See a Document (page 32)).

2.1 Searching with AI Search

AI Search finds documents that match what you mean, not only the exact words you type. *Rules for using the computer lab* finds *Computer Laboratory Rules* even though the words differ. The results are found and ranked by AI, and each one says how it was found.

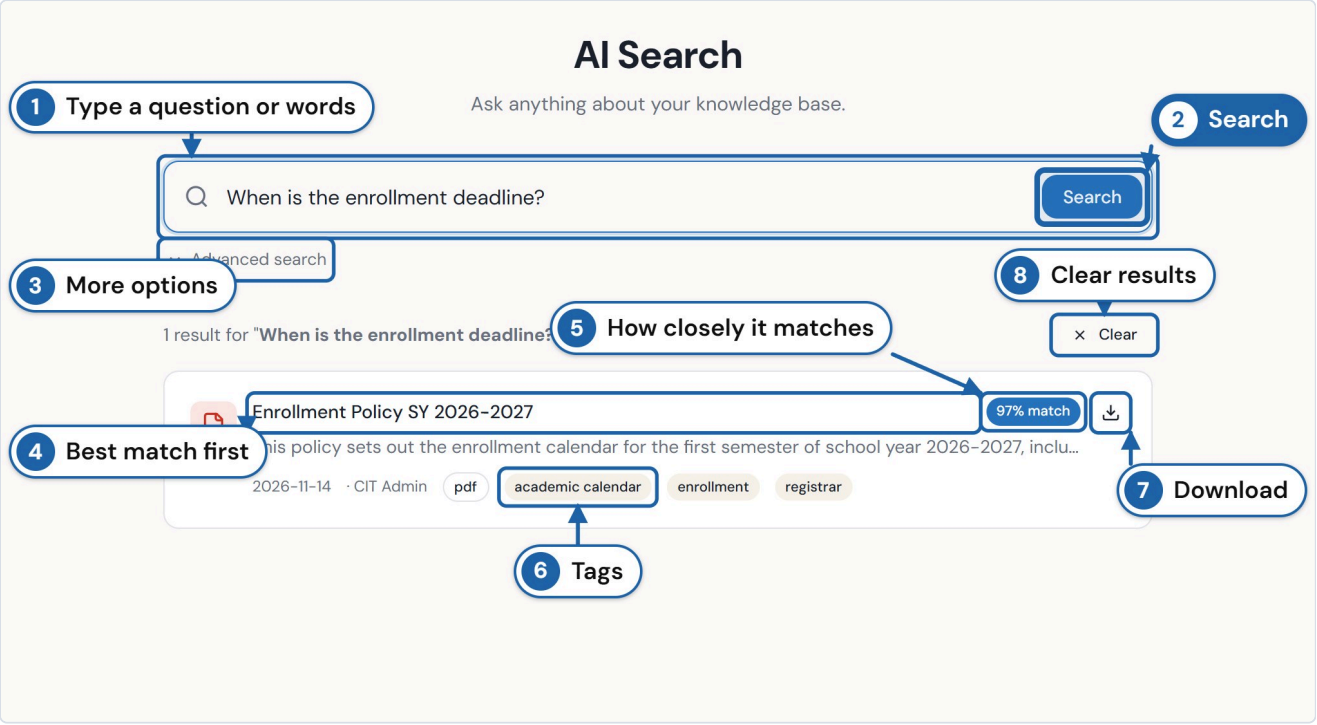


Figure 9. AI Search with a result

No.	Item	What it does
1	Search box	Type a question, a description or keywords, up to 500 characters.
2	**Search**	Runs the search. You can also press Enter.
3	**Advanced search**	Shows more options (see section 2.2, Narrowing a Search (page 18)).
4	Result	A matching document, best match first. Click it to preview the document.

No.	Item	What it does
5	Match badge	How closely the document matches.
6	Tags	The document's tags, with how it was found (for example *Found by meaning* or *Found by document title*), its date, uploader and file type.
7	Download	Downloads the file, if you are allowed to.
8	**Clear**	Clears the results.

To search for documents

1. Click **AI Search** in the menu.
   > **Result:** The AI Search page opens with a few suggestions under **Try asking**.
2. Type what you are looking for, for example `When is the enrollment deadline?`, and press Enter.
   > **Result:** Matching documents are listed, best match first.
3. Click a result.
   > **Result:** A preview of the document opens.

If you misspell a word, AI Search corrects it using the words in the documents you can open. When nothing matches what you typed, it shows *Showing results for* the corrected words; click **Search instead for** to search exactly what you typed. When it found only weak matches, it asks *Did you mean ...?*; click the suggestion to search for it. Because the corrections come from your own documents, the university's own spellings, names and Filipino words are kept.

> **TIP**
> Write the way you would ask a colleague. If you get too many results, add details or use Advanced search.

2.2 Narrowing a Search

Advanced search adds word rules and filters. Fill in only what you need; the search box can be left empty.

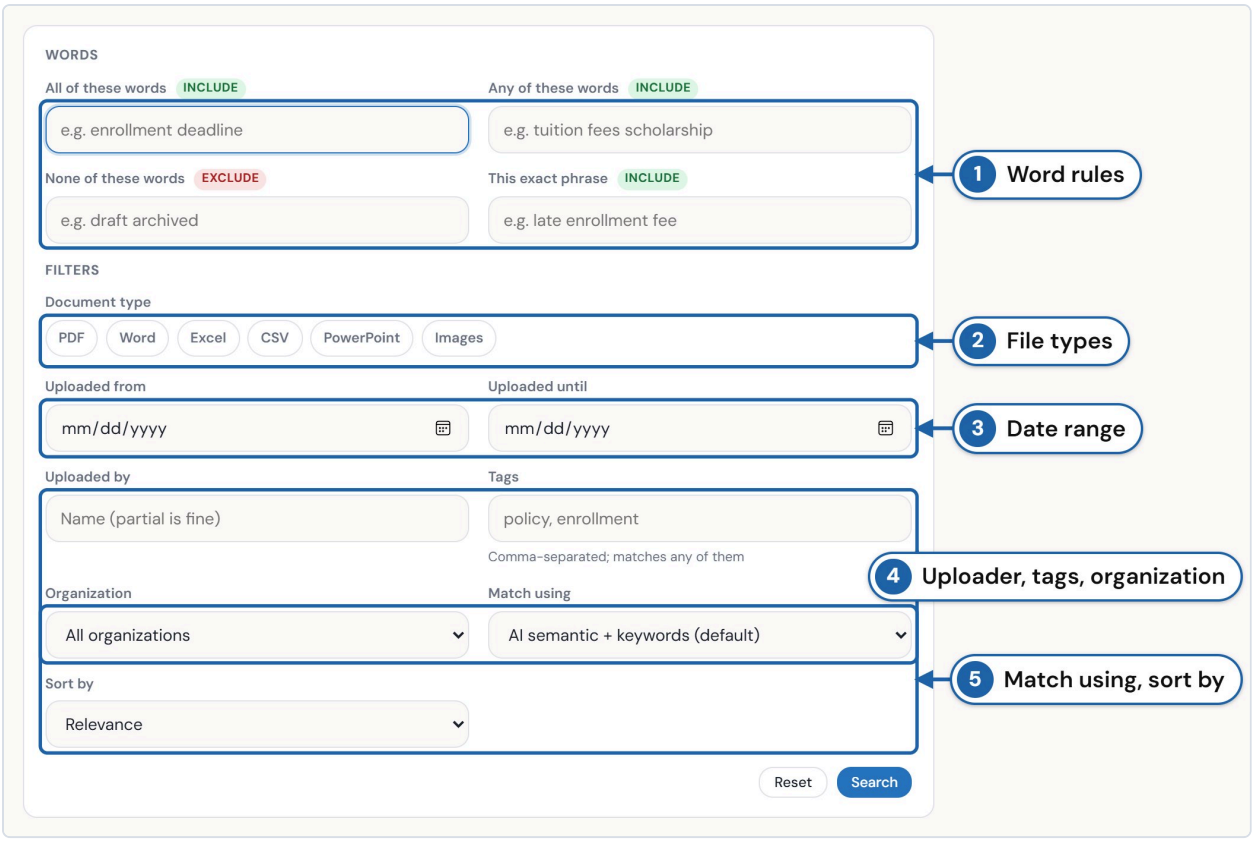


Figure 10. The Advanced search panel

No.	Options	What they do
1	**All of these words**, **Any of these words**, **None of these words**, **This exact phrase**	Require every word, at least one word, none of the words, or the exact phrase.
2	**Document type**	Limit results to PDF, Word, Excel, CSV, PowerPoint or Images. Click again to clear.
3	**Uploaded from**, **Uploaded until**	Limit results to documents uploaded between two dates.
4	**Uploaded by**, **Tags**, **Organization**	Limit results by uploader (part of the name is enough), by tags (separated by commas; any of them matches) or by organization.
5	**Match using**, **Sort by**	Search by meaning and keywords (the default), keywords only or meaning only; sort by relevance, newest, oldest or title.

To narrow a search

1. On the AI Search page, click **Advanced search**, and fill in the options you need.
2. Click **Search**.

   > **Result:** The results match every option you set; the options are listed above the results. **Reset** clears them.

2.3 Finding a Document by Name

On the Documents page, the **Search documents...** box filters the list by name as you type, and the filters narrow it by tag, file type, visibility and date (Figure 13 (page 24), callouts 4 and 5).

2.4 Asking the Q&A Assistant

The Q&A Assistant is an AI that answers questions in plain language from the documents you are allowed to see. It marks which document each statement comes from, so you can check it, and it remembers the recent part of the conversation, so you can ask follow-up questions. The first time you open it, it says that it is an AI and what that means; click **Got it**.



Figure 11. A conversation in the Q&A Assistant

No.	Item	What it does
1	**New chat**	Starts a new conversation.
2	Past conversations	Your conversations, newest first, named from the first question. Click one to reopen it.
3	More options (⋮)	**Rename** or **Delete** the conversation.
4	History button	Hides or shows the list of past conversations.
5	**Delete chat**	Deletes the open conversation.
6	Your question	What you asked.
7	Message box	Type your question, up to 4,000 characters.

No.	Item	What it does
8	Send	Sends the question. While an answer is being written, it becomes a stop button.

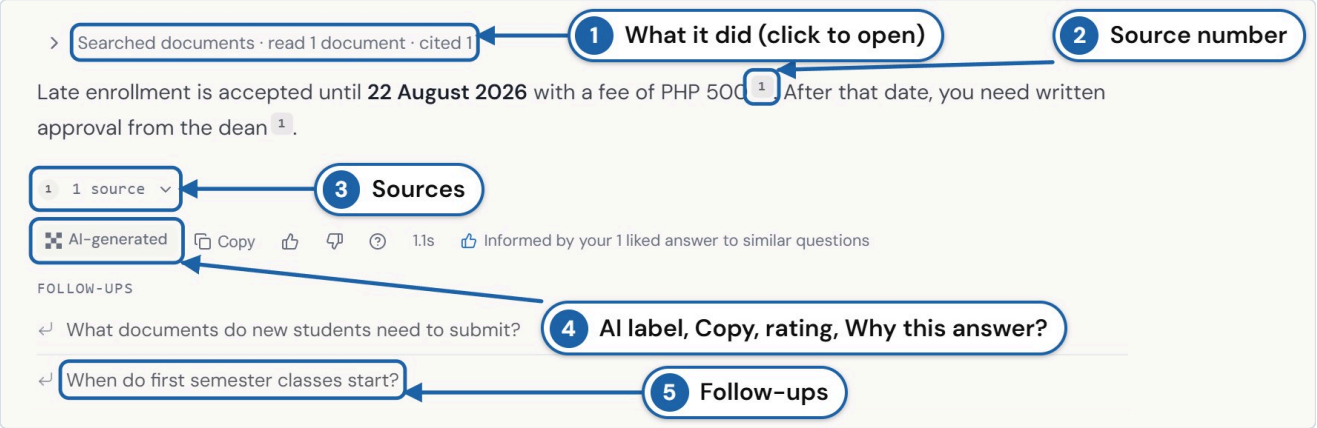


Figure 12. An answer and what's around it

No.	Item	What it does
1	What it did	While the assistant works, each step appears with the SmartKMS mark turning: reading your question, searching the documents, the documents it is reading, writing and checking its sources. When the answer starts it folds into this line; click it to see the steps again.
2	Source number	The document this statement comes from. Click the number to open that document.
3	Sources	How many documents the answer used. Click to list them, each with a short excerpt; click one to open it.
4	Answer buttons	**AI-generated** marks the answer as written by AI. Then **Copy**, thumbs up or down, and **Why this answer?** (the question-mark button). On a computer, point at an older answer to see them.
5	**Follow-ups**	Questions you might ask next, under the latest answer from documents. Click one to ask it.

To ask a question

1. Click **Q&A Assistant** in the menu, then **New chat**.
2. Type your question, for example `When is the enrollment deadline for the first semester?`, and press Enter. (Shift+Enter starts a new line.)

   > **Result:** The steps the assistant takes appear while it works. Then the answer appears as it is written, with small numbers after the statements that come from a document.
3. Click a number, or the **sources** row under the answer, to check the answer in the document.

4. Ask a follow-up question in the same conversation, for example `What about late enrollment?`, or click one of the suggested **Follow-ups**.

WARNING

AI answers can be incomplete or wrong, and can credit the wrong document. Check important information, such as dates, amounts and rules, in the source documents before you act on it or pass it on.

TIP

Ask one thing at a time and include the details that matter: *What is the late enrollment fee for the first semester?* works better than *fees?*

NOTE

Two people can get different answers to the same question if they can see different documents. The assistant gives a web link only when that address is in one of your documents.

Why this answer?

Click the question-mark button under an answer to see how it was made:

- whether it came from your documents, or from the AI model's general knowledge (for small talk, or when no document matched closely);
- which AI model wrote it;
- every document the assistant was given, how each was found (by meaning, title, tag or the words in its text) and how well it matched;
- which of them the answer used, and how that was decided;
- whether your earlier ratings shaped it.

The explanation is saved with the answer and only you can see it. For how SmartKMS uses AI in general, see **Help → How SmartKMS uses AI** in the account menu (Chapter 10, Troubleshooting and Help (page 69)).

If you leave the page while an answer is written

Your question is saved as soon as you send it, and the answer keeps being written on the server if you go to another page, reload or close the tab. Open the conversation again to see it. If the server restarted before the answer was finished, the conversation says so; click **Ask again**.

Rating, renaming and deleting conversations

Rate answers with the thumbs up and down buttons. Ratings are private, and they help: documents behind well-rated answers are preferred for your organization. To rename or delete a conversation, click ⋮ next to it in the list. To stop an answer, click the stop button; the part already written is kept.

WARNING

A deleted conversation can't be recovered.

The public Ask page

Your organization can also offer a public question page at **/ask** (for example `https://skms.dev/ask`), which can be linked from the university website, so that anyone can ask about enrollment, fees and other public information without an account. It answers only from the documents an administrator puts in the public folder (usually named **Public Ask**), never from your other documents, and it doesn't save the questions. It looks and works like the Q&A Assistant, with the list of what it is doing, numbered sources that open the document, **Copy** and a stop button, but without saved conversations, ratings or **Why this answer?**, which need an account. To publish a document there, move it into that folder; to withdraw it, move it out. The server administrator turns the page on (Appendix G, Server Administration (page 83)).

2.5 If You Can't Find Something

For a message shown on screen, see section 10.2, Messages and What They Mean (page 69).

Problem	Solution
Nothing is found, or the answer says it couldn't find this in your documents	Check the spelling, or click the *Did you mean ...?* suggestion if one is shown. Use fewer or different words, or describe the subject. Check that the document is uploaded, approved and visible to you (section 4.1, Who Can See a Document (page 32)).
A new document isn't found	Wait until it shows **Approved** (usually under a minute), then try again.
Results seem unrelated	In Advanced search, choose **Keywords only**, or fill in **All of these words**.
Answers are slow	Answers are written by the university's own server, so speed depends on its hardware and how busy it is. Wait, or try again at a quieter time.
Part of an answer shows as asterisks, such as *G****	A curse word was hidden. Rephrase the question if the answer is unclear.
An answer names a link but it isn't clickable	The address wasn't in any of your documents, so it may be made up. Open the source document to find the real address.
The send button stays a stop button	An answer in that conversation is still being written. Wait, or click stop.
An answer is wrong	Rate it with thumbs down. If a document is out of date, ask its owner to update it.

CHAPTER 3

Add and Work with Documents

Applies to: everyone can open documents. Uploading, editing, renaming and deleting need the Faculty, Staff or Administrator role.

The **Documents** page is where documents are added, organized in folders and opened. Each uploaded document is read and summarized automatically, checked for sensitive personal information, and then becomes searchable by everyone allowed to see it.

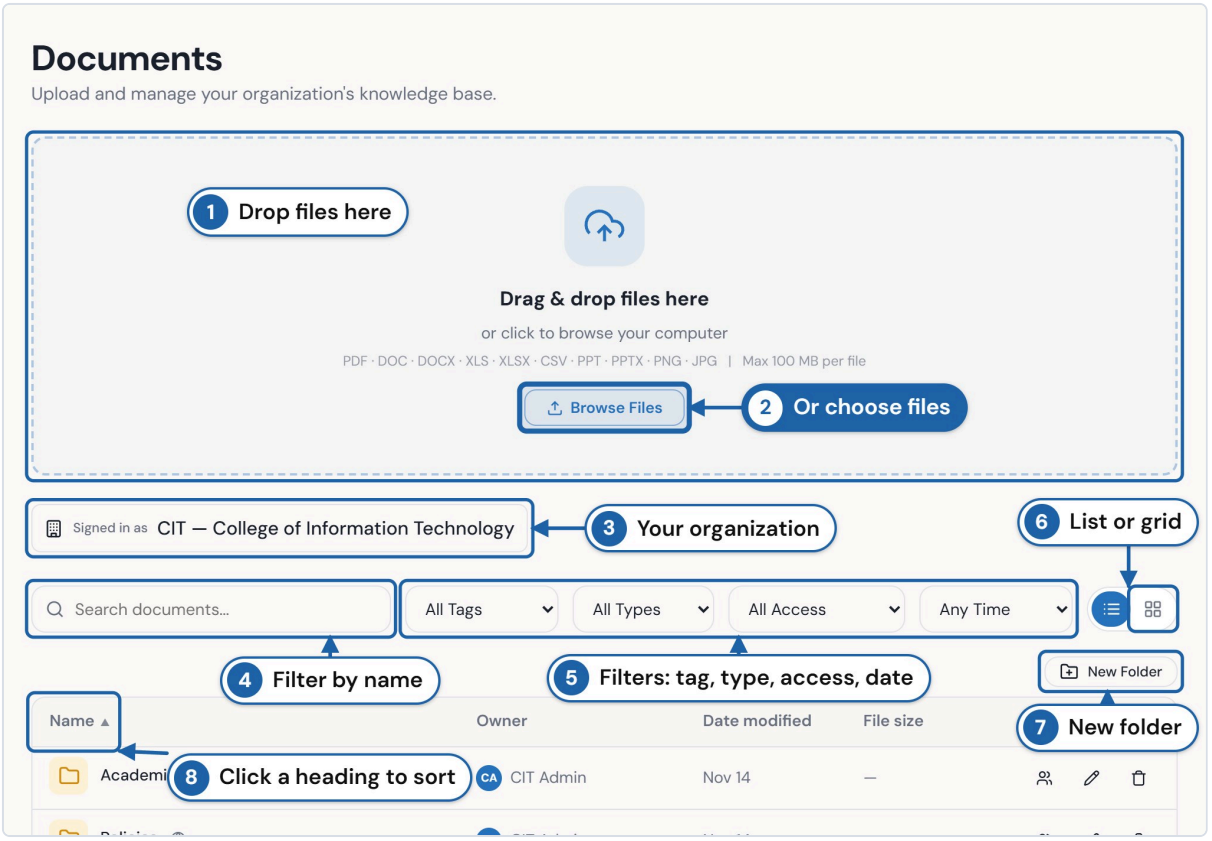


Figure 13. The Documents page

No.	Item	What it does
1	Upload area	Drop files here to upload them. Researchers don't see it.
2	**Browse Files**	Chooses files from your computer to upload.
3	**Signed in as**	The organization whose documents you are viewing. Administrators can switch organization here.
4	**Search documents...**	Filters the list by name as you type.
5	Filters	Narrow the list by tag, file type, visibility and date. Administrators also have an organization filter.
6	List and grid buttons	Switches between a list and a grid of cards.

No.	Item	What it does
7	**New Folder**	Creates a folder (see section 5.1, Working with Folders (page 38)).
8	Column headings	Click **Name**, **Owner**, **Date modified** or **File size** to sort; click again to reverse.

3.1 Uploading Documents

You can upload PDF (.pdf), Word (.doc, .docx), Excel and CSV (.xls, .xlsx, .csv), PowerPoint (.ppt, .pptx) and image (.png, .jpg, .jpeg) files, each up to 500 MB. Text in scanned pages and pictures is read too, so scanned documents are searchable. Every type except images can also be edited in SmartKMS.

To upload documents

Before you start: the Faculty, Staff or Administrator role, and files without personal information such as ID numbers, grades, addresses, or medical or financial details, unless your organization's policy allows it (see section 7.2, What the Screening Looks For (page 46)).

1. Click **Documents** in the menu. To upload into a folder, open the folder first.
2. Drag one or more files onto the upload area, or click **Browse Files**, select the files and click **Open**.

   > **Result:** Each file appears in the list, locked, with its current processing step (Figure 14 (page 25)).
3. Wait for processing to finish, usually 30 to 60 seconds per file. You can work on other pages meanwhile.

   > **Result:** The lock disappears and the document shows **Approved**.
4. Open the document and choose who can see it (see section 4.2, Changing a Document's Visibility (page 33)).

   > **Result:** Until you do, the document is **Private**: only you and administrators can see it.

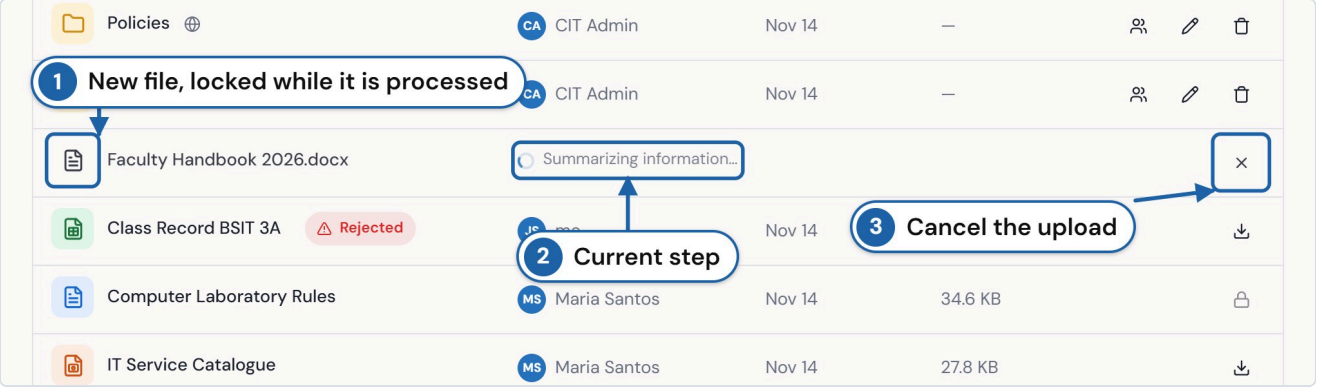


Figure 14. A new upload while it is processed. Click × to cancel it.

While a document is processed, SmartKMS reads its text (*Extracting content...*), checks it for sensitive personal information and prepares it for search (*Analyzing document...*), and writes a two-to-three-sentence summary, key points and two to five suggested tags (*Summarizing*

information...). It then becomes **Approved**, or **Rejected** with a reason (see section 7.3, When Your Document Is Rejected (page 47)).

> **TIP**
> To upload straight into a folder, drop the files on the folder in the list.

To import from Google Drive or OneDrive

Before you start: the Faculty, Staff or Administrator role, and your server administrator has turned the import on (otherwise the buttons aren't shown; see Appendix G, Server Administration (page 83)).

1. Click **Documents** in the menu. To import into a folder, open the folder first.
2. Under **Browse Files**, click **Google Drive** or **OneDrive**.
3. The first time in about an hour, click **Connect Google Drive** or **Connect OneDrive**, sign in with your school account in the window that opens, and allow SmartKMS to see your files.
   > **Result:** The window closes and your files are listed.
4. Open folders, or search by name, and select up to 20 files. Files SmartKMS can't store, such as videos, show *Not supported*.
5. Click **Import**.
   > **Result:** Each file appears in the list, locked, and is processed like an upload.

Google Docs, Sheets and Slides are imported as Word, Excel and PowerPoint files. A file whose name is already used in the folder is kept as a copy, for example *Handbook (1)*. SmartKMS can only read your drive, keeps the connection for about an hour, and never stores your Google or Microsoft password. To end the connection sooner, for example on a shared computer, click **Disconnect** in the import window.

3.2 Uploading a File with the Same Name

If the folder already has a document with the same name, SmartKMS asks what to do:

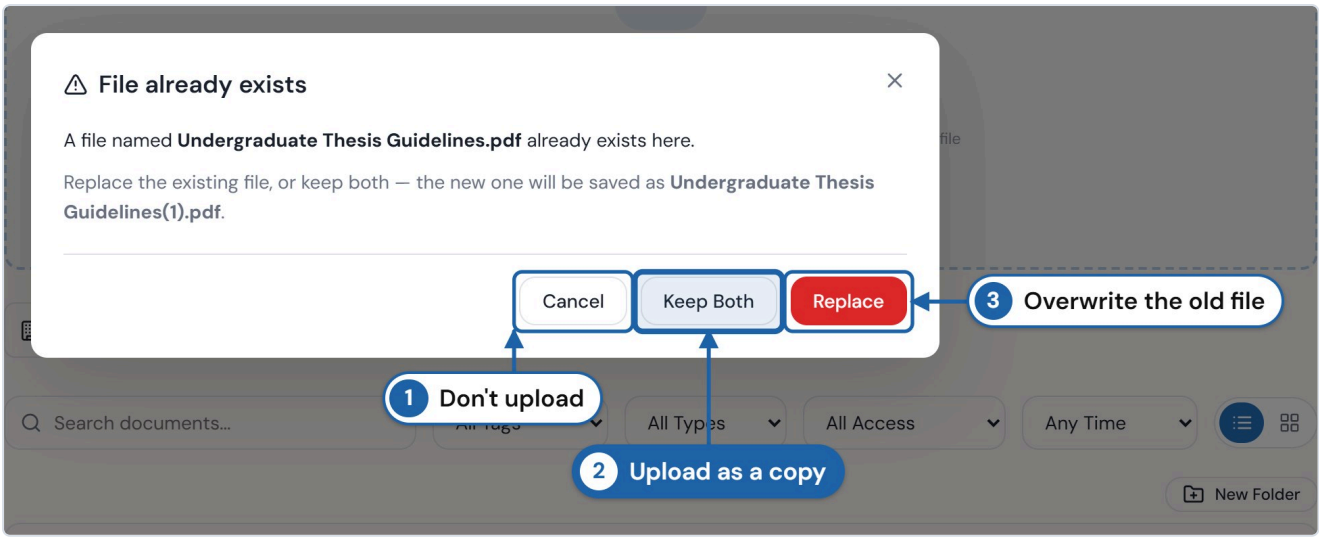


Figure 15. The window shown when a document with the same name exists

- **Cancel** doesn't upload the file.
- **Keep Both** uploads it with a number added, for example *Undergraduate Thesis Guidelines(1)*.
- **Replace** puts the new file in place of the old document. Use it to give a document a newer version.

WARNING

A replaced document doesn't go to the Trash, and you can't bring it back yourself. It's kept on the server, out of use; only an administrator can recover it (see Chapter 6, Archive, Delete and Recover (page 42)).

3.3 Opening a Document

Click a document's name to open it. The viewer shows a preview on the right and, on the left, the document's approval status, tags, AI summary, who can see it, key points and related documents.

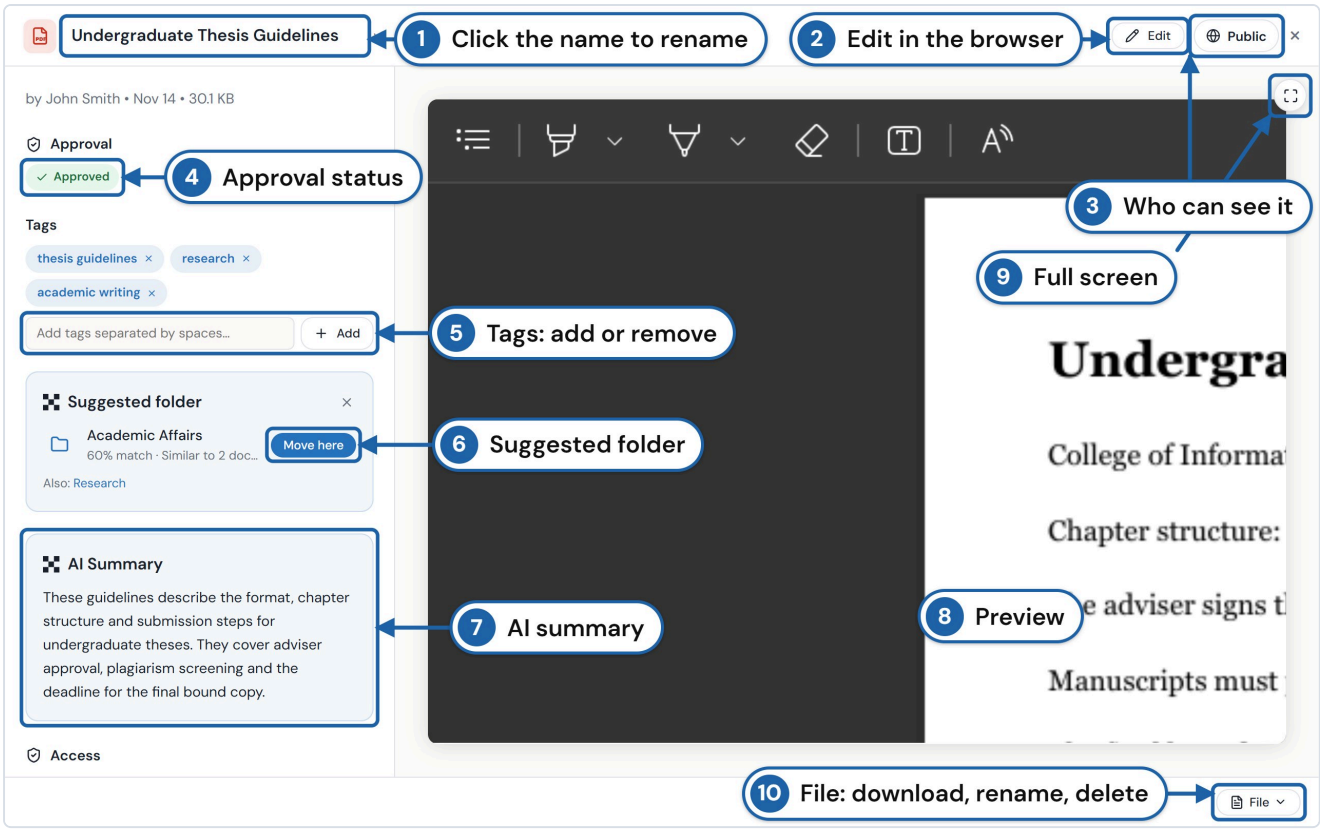


Figure 16. The document viewer

No.	Item	What it does
1	Document name	Click it to rename the document (owner and administrators).
2	**Edit**	Edits the document in the browser (see section 3.4, Editing a Document (page 29)). If you can only view it, **View only** appears instead.
3	Visibility button	Shows who can see the document, for example **Public**. The owner and administrators click it to change this.
4	**Approval**	The approval status (see section 7.1, Approval Statuses (page 46)).
5	**Tags**	Topic tags (see section 5.2, Tags (page 38)).
6	**Suggested folder**	A folder with similar documents. **Move here** moves the document there.
7	**AI Summary**	A short summary written by SmartKMS.
8	Preview	The document itself. Scroll to read; pictures can be zoomed with **+**, **−** or the mouse wheel.
9	Full screen	Enlarges the preview.
10	**File**	Download, Make view-only, Rename and Delete (see section 3.5, Downloading and Renaming (page 29)).

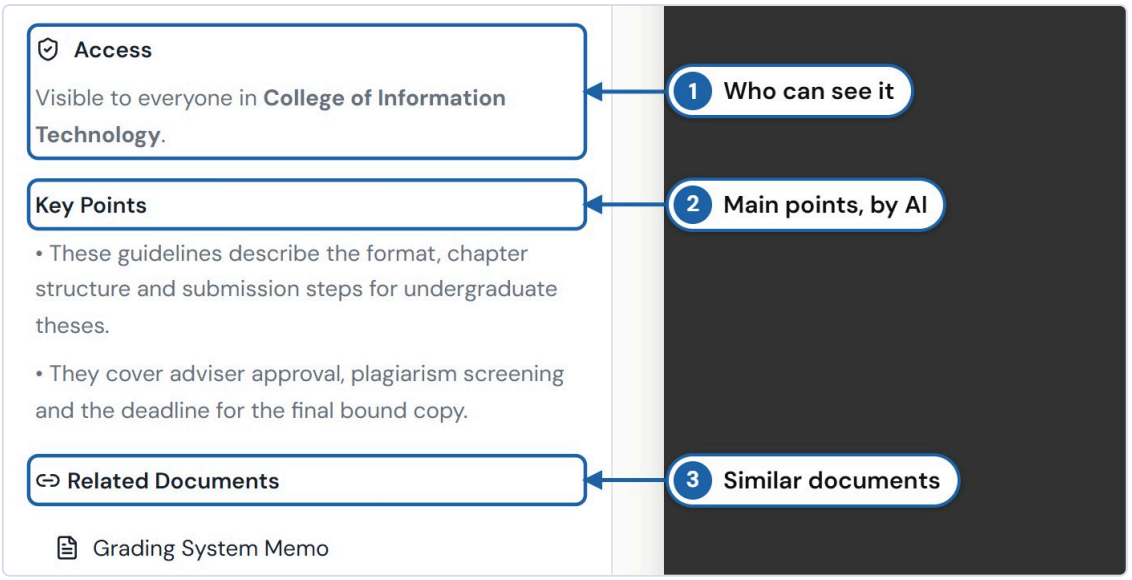


Figure 17. Further down the left panel: **Access** (who can see the document), **Key Points** and **Related Documents**

3.4 Editing a Document

You can edit PDF, Word, Excel, CSV and PowerPoint documents in the browser if you uploaded the document, it was shared with you as **Can edit**, you are staff in its organization, or you are an administrator. Every save is kept as a version, so you can go back.

To edit a document

1. Open the document and click **Edit**.
   Result: The document opens in the editor, inside the viewer.
2. Make your changes, then click **Save** to keep editing, or **Close** to finish.
   Result: A message says *Content saved — re-analyzing in the background...*, and later *Summary updated with your latest changes.*

To go back to an earlier version

1. Open the document, click **Edit**, and choose **File** → **Version History** in the editor.
   Result: The saved versions are listed, newest first.
2. Select the version and click **Restore**.
   Result: The document returns to that version. The content you replaced is kept as a version too.

WARNING

If you close the viewer with unsaved changes, SmartKMS asks whether to save or discard them. Discarded changes can't be recovered.

3.5 Downloading and Renaming

The **File** menu at the bottom right of the viewer holds the actions for the whole document.

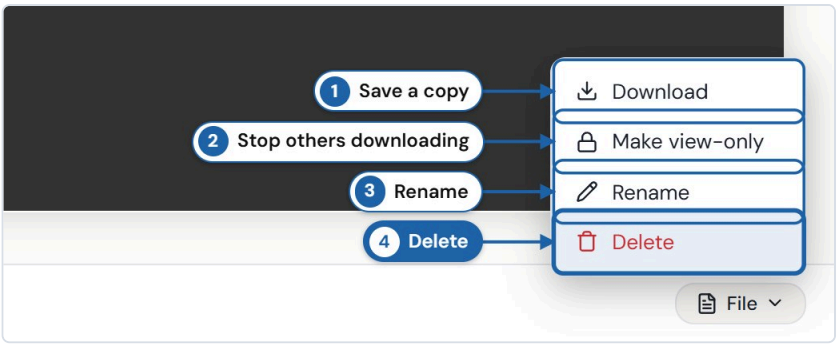


Figure 18. The **File** menu

No.	Item	What it does	Who sees it
1	**Download**	Saves a copy to your computer. Shows **No download** if you aren't allowed.	Everyone who can open the document
2	**Make view-only**	Stops everyone except you and administrators from downloading. **Allow download** undoes it.	Owner and administrators
3	**Rename**	Changes the name. You can also click the name at the top of the viewer.	Owner and administrators
4	**Delete**	Moves the document to the Trash (see section 6.2, Deleting Documents (page 43)).	Owner and administrators

> **NOTE**
> **Make view-only** stops downloading, not reading. Anyone who can open the document can still take screenshots or copy text.

3.6 Right-Click Menus and Selecting Several Documents

Right-click any document or folder on the Documents page for a menu of what you can do with it. Only the actions you're allowed to take are listed. Hold Shift while right-clicking to get your browser's own menu.

Selecting several documents works as in Windows File Explorer:

- Ctrl +click (Cmd +click on a Mac) adds or removes one document.
- Shift +click selects a range.
- Ctrl + A selects every document listed; Esc clears the selection.

A bar above the list shows how many are selected. A plain click still opens a document. Opening another folder, or changing the filters or sort order, clears the selection.

3.7 If Something Goes Wrong with a Document

For a message shown on screen, see section 10.2, Messages and What They Mean (page 69).

Problem	Solution
No upload area	Your role is Researcher. Ask your administrator if you need to upload.
The document stays locked for several minutes	Large files take longer. If it doesn't finish within five minutes, tell your administrator: the AI service may need restarting.
The document is **Rejected**	Read the reason in the viewer, and see section 7.3, When Your Document Is Rejected (page 47).
No **Edit** button, or **View only** shown	The document was shared with you as **Can view**. Ask the owner for **Can edit**.
The editor doesn't open	Tell your administrator: the server's editor keys may not match. Running the launcher on the server fixes the most common cause.
The editor says it isn't loading, with **Reload** and **Continue anyway**	An ad blocker or privacy extension is stopping it. Turn the blocker off for SmartKMS, then click **Reload**.
The preview is blank or can't be reached	Refresh the page. If office files never preview, tell your administrator.
No download in the File menu	The owner made the document view-only or didn't allow you to download. Read it in SmartKMS, or ask the owner.

CHAPTER 4

Share and Control Access

Applies to: the person who uploaded a document, and administrators. Folder sharing: Faculty, Staff and Administrators.

Every document has a *visibility* setting that decides who can find and open it, in the Documents list, in AI Search and in Q&A answers. New documents start **Private**. This chapter explains the rules, then how to share a document with your organization, with named people, with other organizations, or through a folder.

4.1 Who Can See a Document

SmartKMS asks four questions, in this order. The first *Yes* decides.

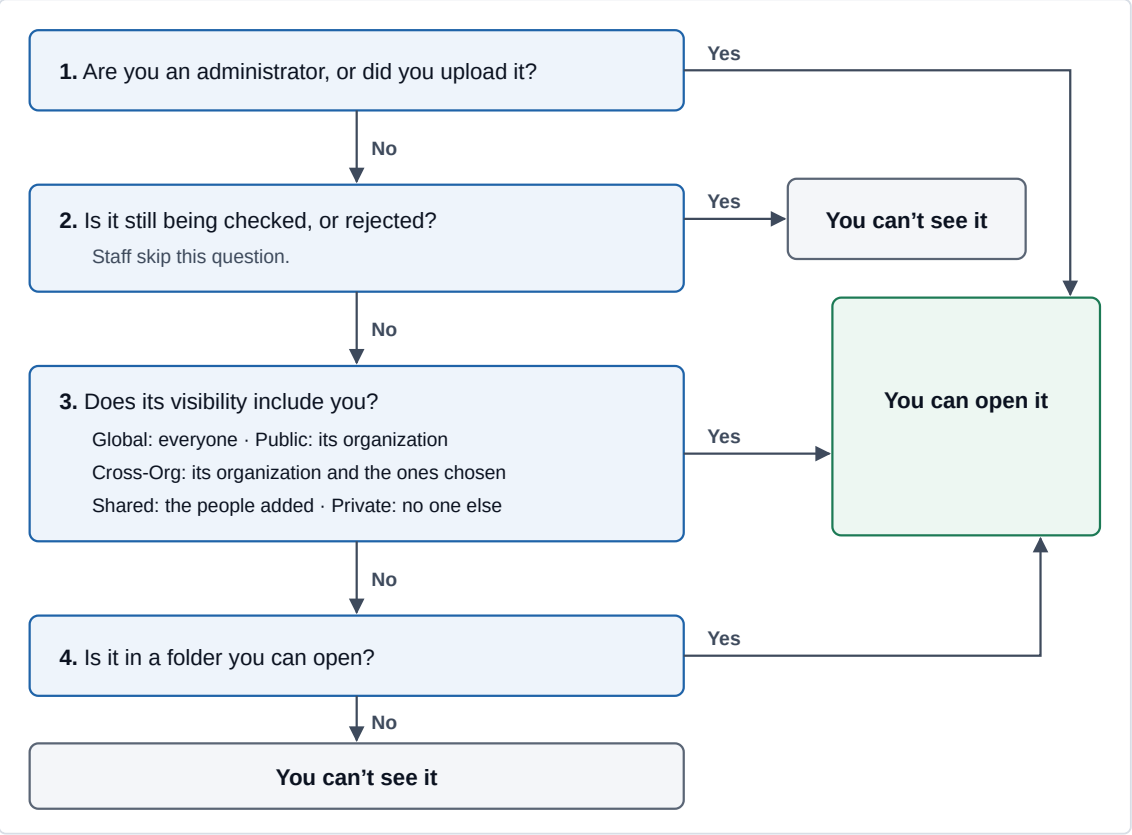


Figure 19. How SmartKMS decides whether you can open a document

The five visibility settings:

Visibility	Who can find and open the document
Private	Only you (and administrators). New uploads start here.
Public	Everyone in your organization.
Shared	Only the people you add, from any organization (see section 4.3, Sharing with Specific People (page 34)).
Cross-Org	Everyone in your organization, plus the organizations you choose (see section 4.4, Sharing with Other Organizations (page 35)).
Global	Everyone in every organization.

Three more things to know:

- **Unapproved documents stay hidden.** While a document is being checked, or after it is rejected, only its uploader, administrators, and staff whose visibility includes it can see it (see Chapter 7, Review Documents (page 46)).
- **A folder only ever adds people.** Everyone who can open a folder can open every document in it, even Private ones. A document is never shared less than its own setting.
- **Seeing isn't downloading.** Whether someone can download is a separate choice (see section 3.5, Downloading and Renaming (page 29)). Nobody can open a document while it's in the Trash.

4.2 Changing a Document's Visibility



Figure 20. The visibility menu at the top right of the viewer

To change a document's visibility

Before you start: you uploaded the document, or you are an administrator.

1. Open the document and click the visibility button at the top right, for example **Private**.

   Result: The visibility menu opens.

2. Click the new setting.

   Result: The button shows the new setting, and the **Access** section on the left says who can see the document.

3 For **Shared** or **Cross-Org**, choose the people or organizations in the **Access** section, as described next.

4.3 Sharing with Specific People

Give named colleagues, in any organization, access to one document without making it public. For each person you choose whether they can only view or also edit, and whether they can download.

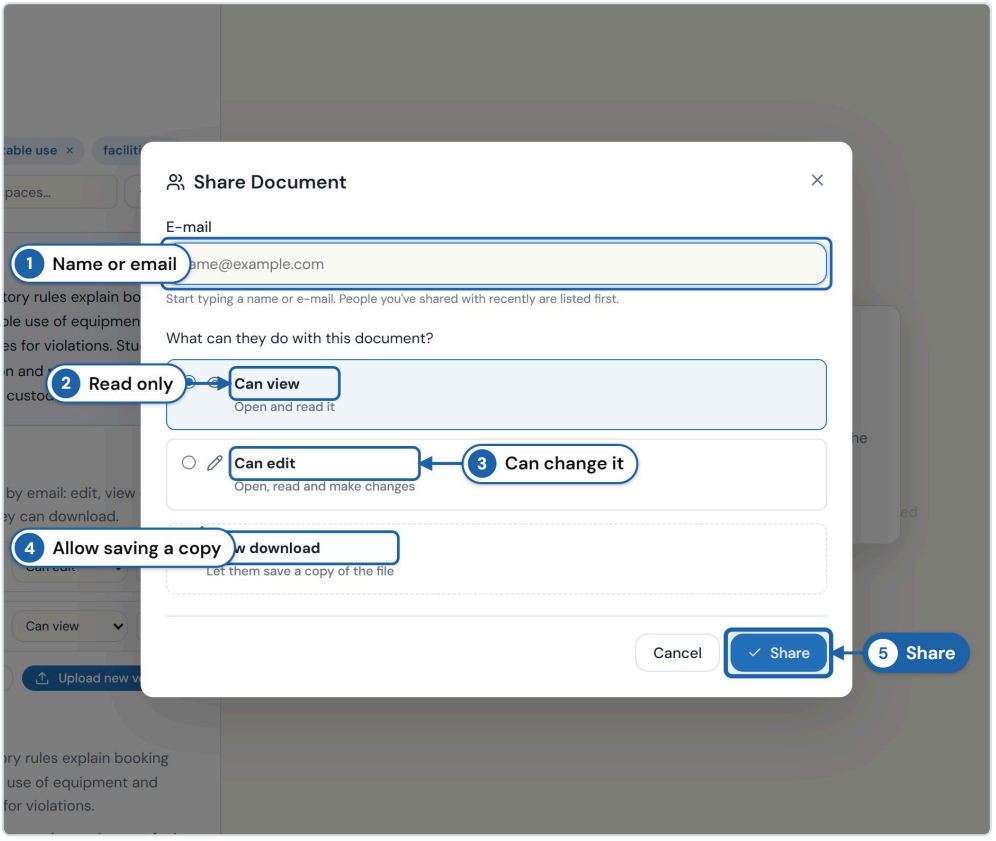


Figure 21. The **Share Document** window

No.	Item	What it does
1	**E-mail**	Start typing a name or email address and pick the person from the list. People you shared with recently are listed first.
2	**Can view**	The person can open and read the document.
3	**Can edit**	The person can also edit it and restore versions.
4	**Allow download**	Lets the person save a copy of the file.
5	**Share**	Gives the person access.

To share a document with a person

Before you start: you uploaded the document (or you are an administrator), and the person has a SmartKMS account.

1. Open the document, click the visibility button and choose **Shared**.
2. In the **Access** section, click **Add person by email**.
   > **Result:** The **Share Document** window opens.
3. Type part of the person's name or email address and choose them from the list.
4. Choose **Can view** or **Can edit**, select or clear **Allow download**, and click **Share**.
   > **Result:** The person appears in the **Access** list, and the document appears in their Documents list, search results and Q&A answers.

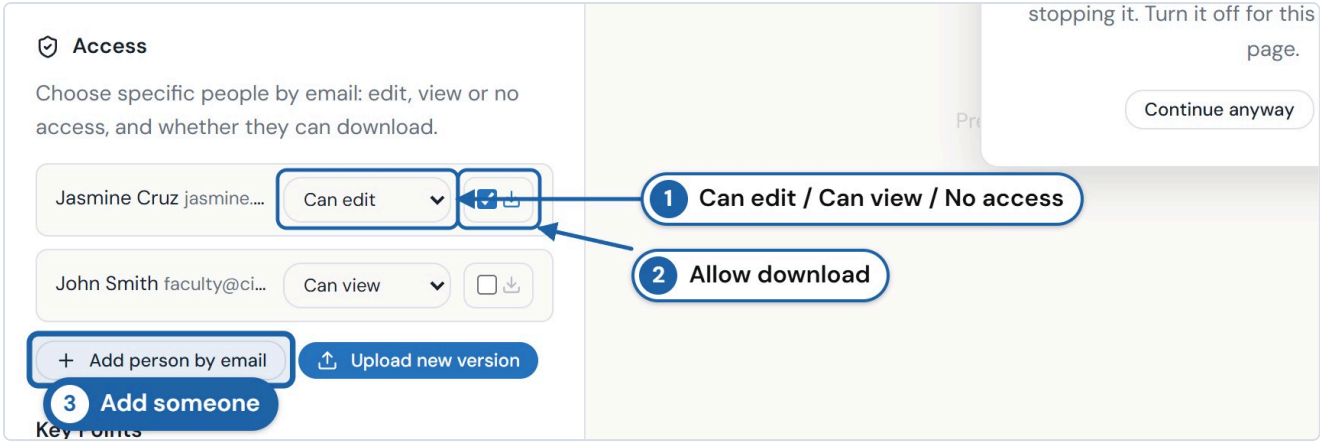


Figure 22. The **Access** section of a **Shared** document

To change someone's access later, use the drop-down next to their name in the **Access** section: **Can edit**, **Can view**, or **No access** to remove them. The checkbox next to it controls downloading. Changes save at once.

The person can...	Can view	Can edit
Find and open the document, read its summary, and ask the Q&A Assistant about it	Yes	Yes
Download it (if allowed, and the document isn't view-only)	Yes	Yes
Edit it and restore versions	No	Yes
Change its visibility, rename it or delete it	No	No

> **NOTE**
> SmartKMS doesn't send email when you share a document. Tell the person yourself.

4.4 Sharing with Other Organizations

Make a document available to everyone in selected organizations, for example a policy that applies to two colleges. Everyone in your own organization keeps access.

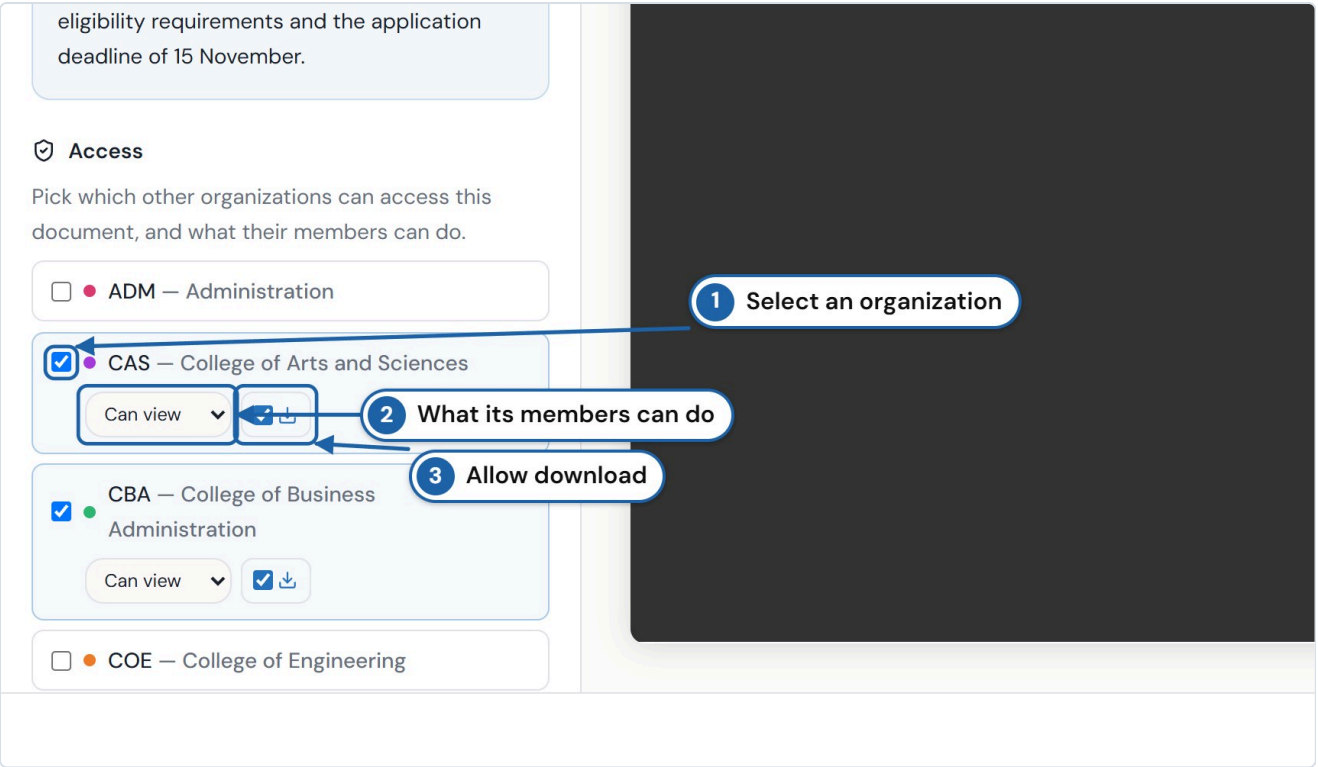


Figure 23. Choosing organizations for a **Cross-Org** document

To share a document with other organizations

1. Open the document, click the visibility button and choose **Cross-Org**.
   Result: The **Access** section lists the other organizations.
2. Select each organization that should have access.
   Result: An access level and a download checkbox appear next to it.
3. Choose **Can view** or **Can edit**, and whether its members can download.
   Result: Changes save at once. Clear an organization to stop sharing with it.

4.5 Sharing a Folder

A folder has the same five visibility settings as a document. A new folder is **Private**, and a shared folder shows a small sharing icon next to its name. Sharing a folder shares everything in it (section 4.1, Who Can See a Document (page 32)); people get **Can view** or **Can edit**, and downloading still follows each document's own setting.

To share a folder

Before you start: the Faculty, Staff or Administrator role, and the folder belongs to your organization.

1. On the Documents page, click the people icon next to the folder (in the grid view: the folder's ⋮ menu → **Share**).
   Result: The **Share** window lists the five settings.

2. Choose a setting. For **Shared**, type each person's email address, click **Add**, and choose **Can view** or **Can edit**. For **Cross-Org**, select the organizations and what they can do.

   > **Result:** If more people would be able to open the folder's documents, a warning says how many documents that affects.

3. Click **Save**.

   > **Result:** A message confirms the new setting, for example *"Course Files" is now public.*

IMPORTANT

Moving a document into a shared folder shares it with the folder's people. SmartKMS asks first, and names who would gain access.

4.6 If Sharing Doesn't Work as Expected

Problem	Solution
A colleague can't find a document I shared	Check the visibility and the **Access** section, and that the document is **Approved**. Go through Figure 19 (page 32) as your colleague.
A colleague sees a document in their main list, not in its folder	They can open the document but not the folder. That's expected.
A document I didn't share is open to colleagues	It's in a shared folder. Move it out, or narrow the folder's sharing.
I can't change the visibility	Only the uploader and administrators can. Ask the uploader.

CHAPTER 5

Organize and Improve the Knowledge Base

Applies to: Faculty, Staff and Administrators.

The *knowledge base* is every document in SmartKMS. The better it's organized, the easier documents are to browse, and the better AI Search and the Q&A Assistant work. SmartKMS helps with automatic tags, folder suggestions, related documents and knowledge-gap reports.

5.1 Working with Folders

Folders hold documents on the Documents page. A document is in one folder at most.

To create a folder

1. On the Documents page, click **New Folder** (Figure 13 (page 24), callout 7).
2. Type a name and click **Create**.

   Result: The folder appears at the top of the list. Only you can see it until you share it (section 4.5, Sharing a Folder (page 36)).

To move documents into a folder

1. Drag the document onto the folder in the list. Or open the document and, under **Suggested folder**, click **Move here**.

   Result: If the folder is shared more widely than the document, SmartKMS asks *Share with the folder's people?* first. Click **Move** to go ahead.

To rename or delete a folder

Before you start: the folder belongs to your organization. You can rename or delete any folder you can see, not only your own.

1. Click the pencil icon next to the folder to rename it, or the bin icon to delete it, and confirm.

   Result: Deleting a folder doesn't delete its documents: they move to the main list with their own visibility. Anyone who could open them only through the folder loses access.

5.2 Tags

Tags are short topic words, such as *enrollment* or *thesis guidelines*. SmartKMS suggests two to five for each new document, reusing tags your organization already has. Use the **All Tags** filter on the Documents page, or **Tags** in Advanced search, to list every document with a tag.

To add or remove tags

1. Open the document (Figure 16 (page 28), callout 5).
2. Type tags separated by spaces and press Enter or click **Add**. To remove a tag, click its ×.

TIP

Reuse the tags in the **All Tags** filter. One spelling per topic keeps filters useful.

5.3 Folder Suggestions and Related Documents

When you open a document that isn't in a folder, SmartKMS may suggest a folder with similar documents. **Move here** moves the document; **Also:** lists other possible folders; × stops suggesting those folders for that document. **Related Documents**, lower in the viewer, lists documents on similar topics.

5.4 Seeing What People Search For

The **Analytics** page shows how your organization uses SmartKMS, including searches that found nothing. Use it to see which documents people need.

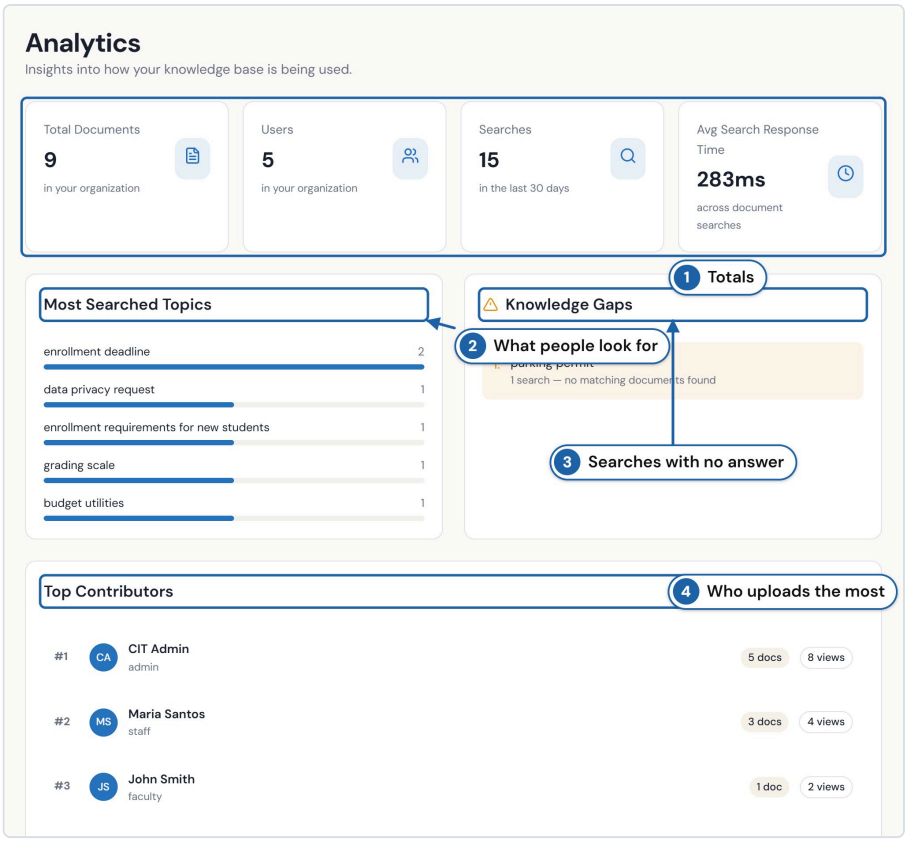


Figure 24. The Analytics page

No.	Item	What it shows
1	Totals	Documents (not counting rejected or deleted ones), active users, searches in the last 30 days, and average search time.
2	**Most Searched Topics**	The most frequent searches, with how many times.
3	**Knowledge Gaps**	Searches that found no document, with how many times.
4	**Top Contributors**	The people who uploaded the most documents, with their documents' view counts.

To find out which documents are missing

1. Click **Analytics** in the menu and read **Knowledge Gaps**.
   > **Result:** Each entry is something people searched for without finding a document.
2. For each gap, check whether a document exists but is private, badly named or not uploaded yet, and share, rename or upload it.
   > **Result:** New searches for that topic find it.

NOTE

Analytics covers your own organization and shows search words, not who searched. The lists fill in as people search.

5.5 Keeping the Knowledge Base Up to Date

- Replace outdated documents with their new versions instead of uploading copies (section 3.2, Uploading a File with the Same Name (page 26)).
- Delete documents that no longer apply, so old information doesn't appear in answers.
- Check **Knowledge Gaps** regularly.
- Give documents clear names: the name is shown in search results and answer sources.

CHAPTER 6

Archive, Delete and Recover

SmartKMS protects your work in four ways: every edit is kept as a version, outdated documents can be archived instead of deleted, deleted documents wait in the Trash for 30 days, and an administrator backs up the whole system.

What happened	How to recover	Who can
An edit went wrong	Restore an earlier version (section 3.4, Editing a Document (page 29))	Anyone who can edit the document
A document is outdated or was uploaded by mistake	Archive it, and retrieve it later if needed (section 6.1, Archiving Outdated Documents (page 42))	The uploader, or an administrator
A document was deleted	Restore it from the Trash within 30 days (section 6.3, Restoring Documents from the Trash (page 44))	The uploader, or an administrator
A file was replaced by mistake	Ask an administrator; the replaced document is kept on the server	Administrator, with the server administrator
A conversation was deleted	Can't be recovered	—
The server failed or lost data	Restore from a backup (section 8.6, Backing Up and Restoring (page 62))	Administrator

6.1 Archiving Outdated Documents

Applies to: Faculty, Staff and Administrators.

Archive a document when it is out of date or was uploaded by mistake, but you want to keep it, for example last year's enrollment calendar. An archived document is hidden from everyone else: it leaves the Documents page, AI Search and the Q&A Assistant, and links to it say *This document has been archived and is no longer available.* Only you and administrators can still open it. Nothing is ever removed from the Archive on its own.

To archive a document

Before you start: you uploaded the document, or you are an administrator.

1. Right-click the document on the Documents page and click **Archive**, or open it and click **File → Archive**.
   > **Result:** SmartKMS asks *Archive this document?* and says what will happen.
2. Click **Archive**.
   > **Result:** A message says the document was archived, and it disappears from the list for everyone.

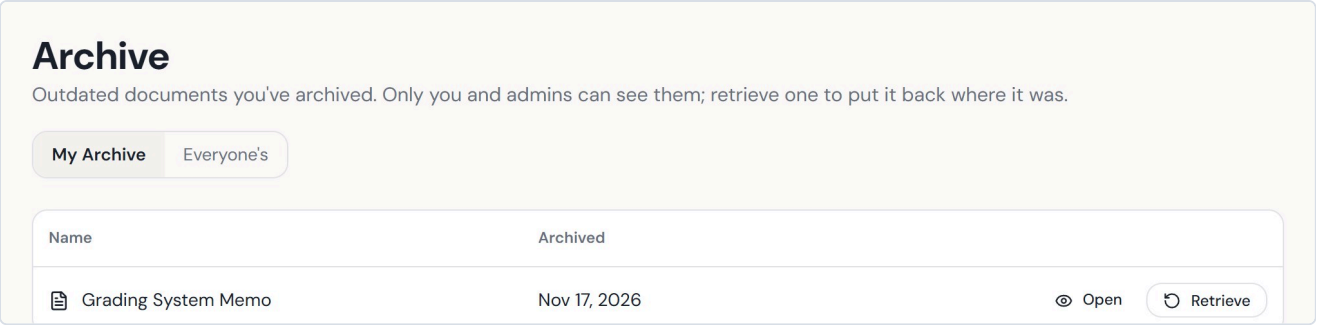


Figure 25. The **Archive** page

To retrieve an archived document

1. Click **Archive** in the menu.

   Result: The documents you archived are listed, most recent first. Administrators can switch to **Everyone's**.

2. Click **Open** to check a document, or **Retrieve** to put it back.

   Result: A retrieved document is back exactly as it was: same folder, sharing and approval status.

To act on several documents at once, select them (click, Ctrl +click or Shift +click) and use **Retrieve** or **Move to Trash** in the selection bar. A document moved from the Archive to the Trash goes back to the Archive if it is restored.

> **NOTE**
> Archiving is not deleting. To remove a document for good, move it to the Trash (section 6.2, Deleting Documents (page 43)).

6.2 Deleting Documents

To delete a document

Before you start: you uploaded the document, or you are an administrator.

1. Open the document and click **File** → **Delete**.

   Result: SmartKMS asks *Move to Trash?*

2. Click **Move to Trash**.

   Result: The document disappears from the list, search results and the Q&A Assistant for everyone.

To delete several documents

1. Select the documents on the Documents page (section 3.6, Right-Click Menus and Selecting Several Documents (page 30)). On an Android phone or tablet, long-press a document and choose **Select**. On an iPhone or iPad, delete documents one at a time.

2. Click **Move to Trash** in the selection bar, and confirm.

   > **Result:** A message says how many were moved. If some can't be deleted by you, the button says so, for example *Move to Trash (2 of 3)*.

> **WARNING**
> After 30 days in the Trash, a document and its earlier versions are removed from storage for good. Backups older than 30 days aren't kept either, so restore a mistake straight away.

6.3 Restoring Documents from the Trash

Applies to: Faculty, Staff and Administrators.

Click **Trash** in the menu to see the documents you deleted, with how many days each has left. In the last 3 days the time left turns red.

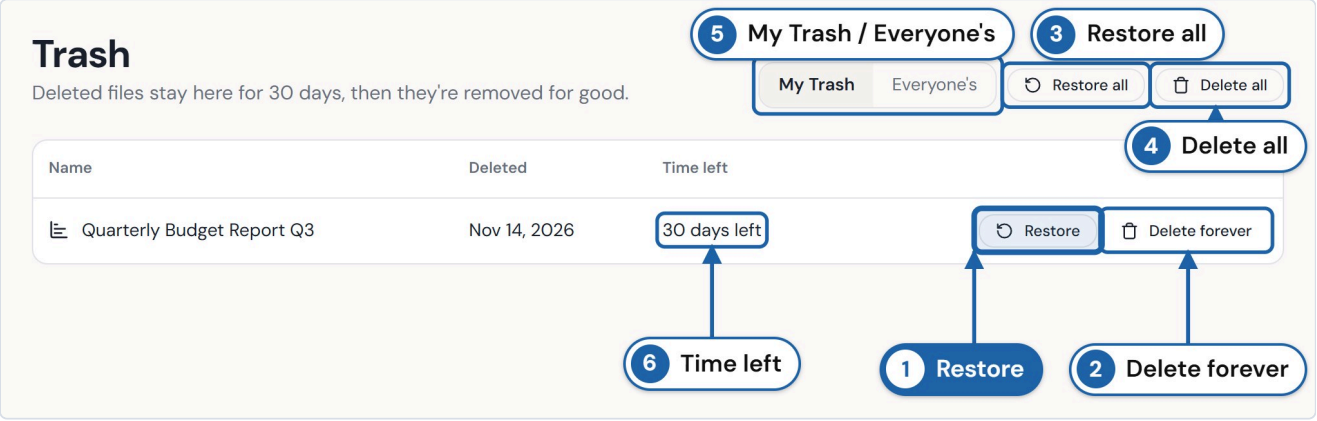


Figure 26. The **Trash** (an administrator's view)

No.	Item	What it does
1	**Restore**	Puts the document back exactly as it was: same folder, visibility and approval status.
2	**Delete forever**	Removes the document now instead of waiting. This can't be undone.
3	**Restore all**	Puts back everything in the list.
4	**Delete all**	Deletes forever everything in your own Trash.
5	**My Trash** / **Everyone's**	Administrators only: switches between their own Trash and every user's. **Delete all** still only empties your own.
6	Time left	Days until the document is removed for good; *Last day* on the final day.

To restore a document

1. Click **Trash** in the menu.

   > **Result:** Your Trash opens, most recently deleted first.

2. Find the document and click **Restore**.

   > **Result:** A message says *Restored*, and everyone who could see the document before can see it again.

To act on several documents at once, select them as on the Documents page (section 3.6, Right-Click Menus and Selecting Several Documents (page 30)), then use **Restore** or **Delete forever** in the selection bar. If you didn't upload a deleted document, ask its uploader or an administrator to restore it.

CHAPTER 7

Review Documents

Every document is screened automatically before others can see it, so that personal information isn't shared by mistake. Most documents are approved within a minute. A flagged document is **Rejected** with a reason; its uploader can ask for a review, and staff or administrators decide.

Upload → Automatic screening → Approved → Visible as its owner set

Rejected → Reapproval requested → Staff or administrator reviews → Approved, or stays rejected

The terms in this chapter:

Term	Meaning
Screening	The automatic check of every new or edited document
Approval status	Where a document stands: **Analyzing...**, **Pending**, **Approved** or **Rejected**
Reapproval request	An uploader's request to review a rejected document. Staff and administrators answer it on the **Reapprovals** page.
Re-approve	The button an administrator uses in the viewer to approve a rejected document directly

7.1 Approval Statuses

Status	Meaning	Who can see the document
Analyzing...	Still being processed and screened	The uploader, administrators, and staff whose visibility includes it
Pending	Screening couldn't decide; waiting for an administrator	
Approved	Cleared for use	Everyone its visibility allows
Rejected	Flagged for sensitive content, or rejected by an administrator	The uploader, administrators, and staff whose visibility includes it

7.2 What the Screening Looks For

Documents are flagged only when they contain real, specific personal information: for example a government ID number, a student's grades or discipline record next to their name, a person's home address or phone number, medical or financial records, or passwords. Policies, handbooks, blank forms and templates are not flagged, even when they mention these subjects. Pictures are also checked for nudity and graphic violence.

Text is checked by an AI model; images are checked by a nudity detector and an image model. If a check can't run, for example because the AI model is down, the document waits for a person to review it instead of being approved.

> **IMPORTANT**
> Screening is a safety net, not a guarantee. You are responsible for what you upload. Remove personal information that others don't need, and follow your organization's data privacy rules.

7.3 When Your Document Is Rejected

A rejected document shows a red **Rejected** label, the reason, and a **Request Reapproval** button in the viewer. Click **How this was decided** to see each automatic check, the AI model that ran it and what it found, and whether a person made the final decision. A person's decision always overrides the checks.

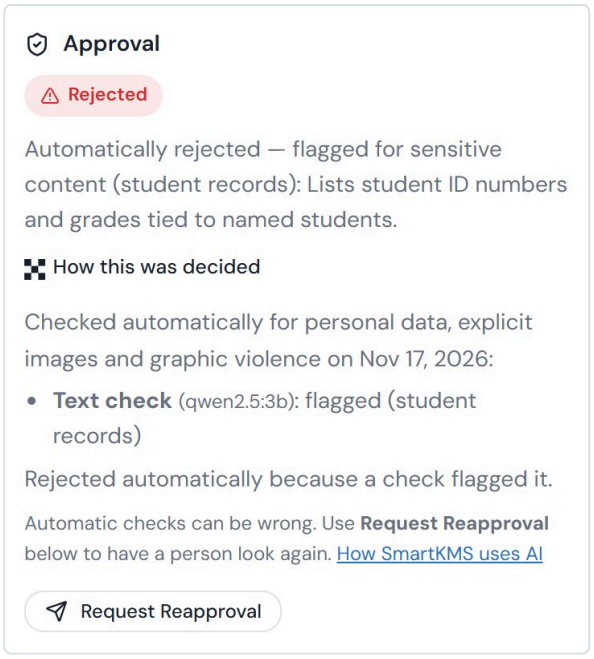


Figure 27. How this was decided, opened under a rejected document

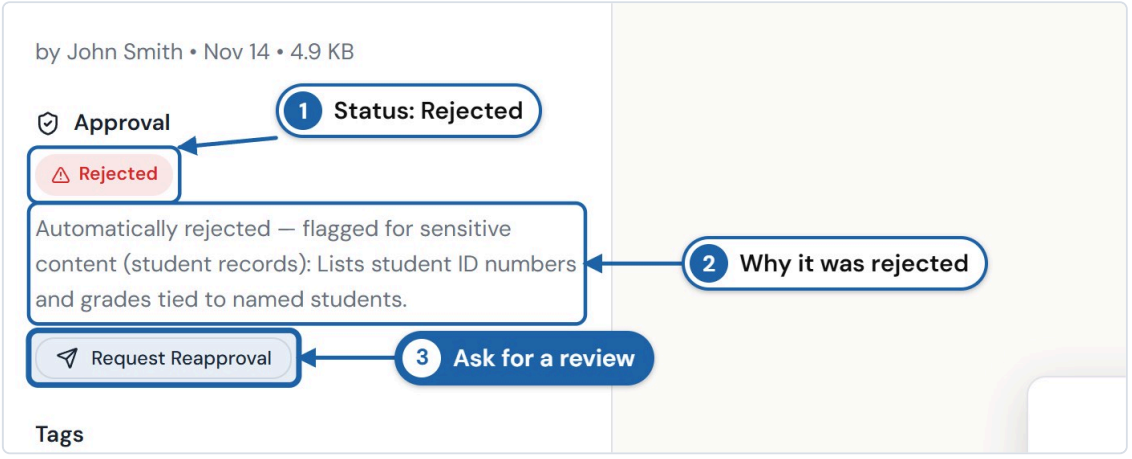


Figure 28. A rejected document, as its uploader sees it

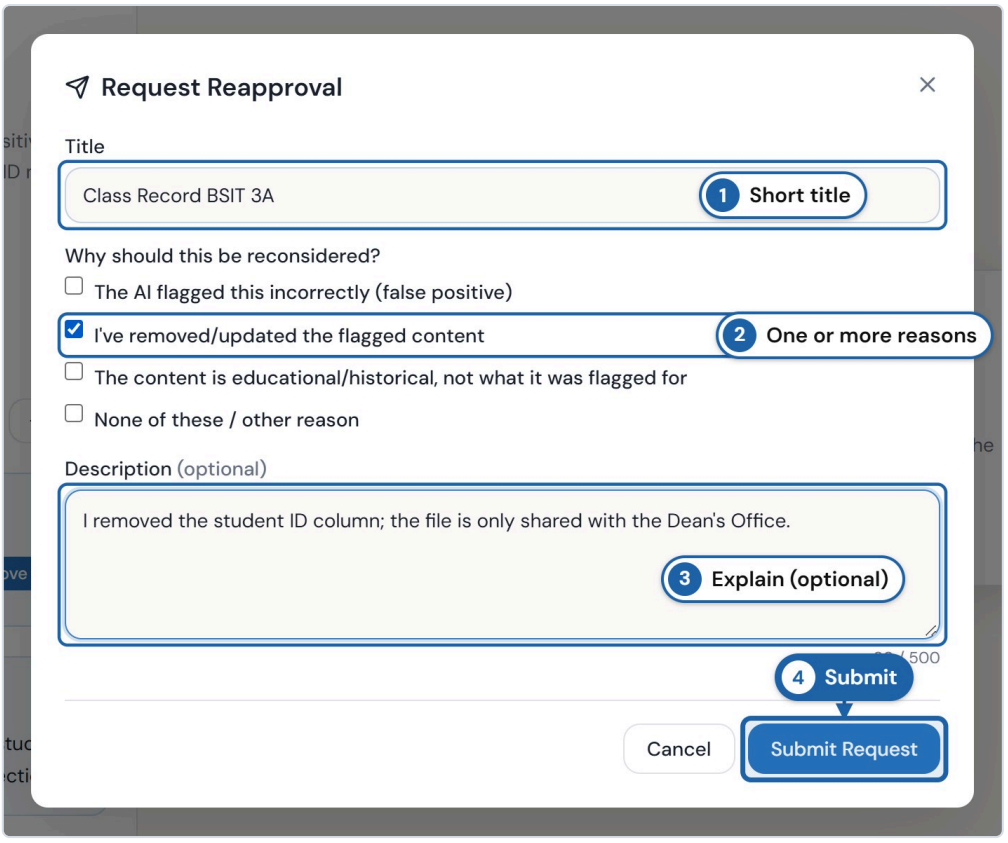


Figure 29. The **Request Reapproval** window

No.	Item	What it does
1	**Title**	A short title, up to 120 characters. It starts as the document's name.
2	Reasons	Select one or more: the AI flagged it incorrectly; you removed or updated the flagged content; the content is educational or historical; or another reason.
3	**Description (optional)**	Explain your request, up to 500 characters. Required if you select no reason.
4	**Submit Request**	Sends the request to reviewers.

To request a review of a rejected document

Before you start: you uploaded the document, and no other request for it is waiting. If the content really is sensitive, remove it first: edit the document, or replace the file.

1. Open the rejected document, read the reason, and click **Request Reapproval**.
2. Check the title, select the reasons that apply, and add a description that will help the reviewer.
3. Click **Submit Request**.

   > **Result:** A message says *Reapproval request submitted.* The request goes to your organization's staff and to administrators.

4. Open the document later to see the outcome.

   > **Result:** **Approved** means the request was accepted. If it is still **Rejected**, ask the reviewer or your administrator why.

> **NOTE**
> SmartKMS doesn't send you a message when your request is decided.

7.4 Reviewing Reapproval Requests

Applies to: Staff (their own organization) and Administrators (every organization).

Click **Reapprovals** in the menu. Requests are filtered to **Pending**, newest first; use the filter buttons for **Approved**, **Rejected** or **All**, and the search box to find a document or requester.

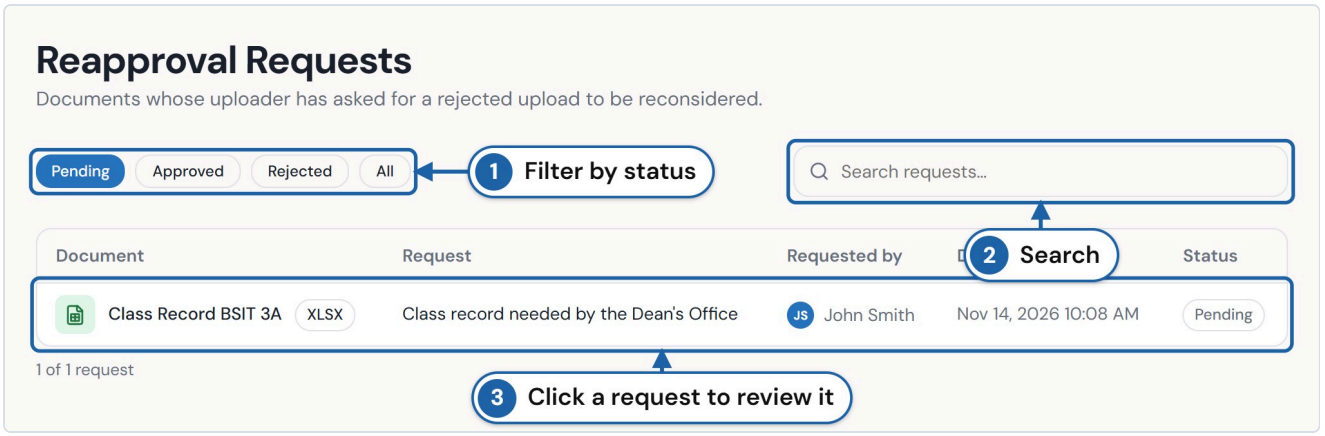


Figure 30. The **Reapprovals** page

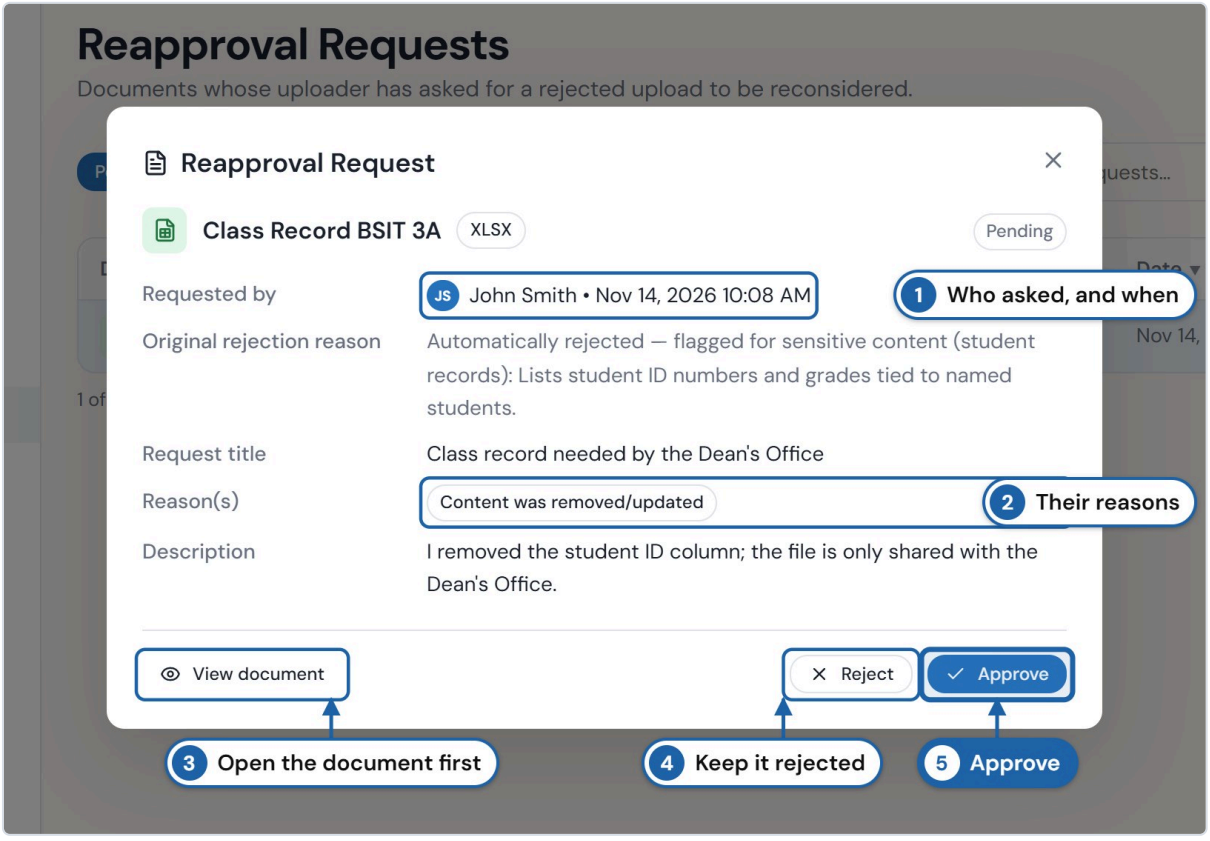


Figure 31. Reviewing a request

No.	Item	What it does
1	**Requested by**	Who asked, and when.
2	**Reason(s)**	The reasons the uploader selected, with the original rejection reason and their description.
3	**View document**	Opens the document so you can check it yourself.
4	**Reject**	Keeps the document rejected.
5	**Approve**	Approves the document, so it becomes visible as its owner set.

To review a reapproval request

1. Click **Reapprovals** in the menu, then click a request.
2. Read the original reason and the uploader's explanation, then click **View document** and check the content.
3. Click **Approve** if the document is safe to share, or **Reject** to keep it rejected.
   > **Result:** SmartKMS asks for an optional note. Only reviewers see it.
4. Confirm.
   > **Result:** The request leaves **Pending**, and the uploader sees the document's new status.

WARNING

Approve only after checking the document yourself. Once approved, it can appear in search results and answers for everyone its visibility allows.

7.5 Approving and Rejecting Documents Directly

Applies to: Administrators.

In the viewer's **Approval** section, a **Pending** document shows **Approve** and **Reject**, and a **Rejected** document shows **Re-approve**. Rejecting asks for a reason, which the uploader sees in the viewer.

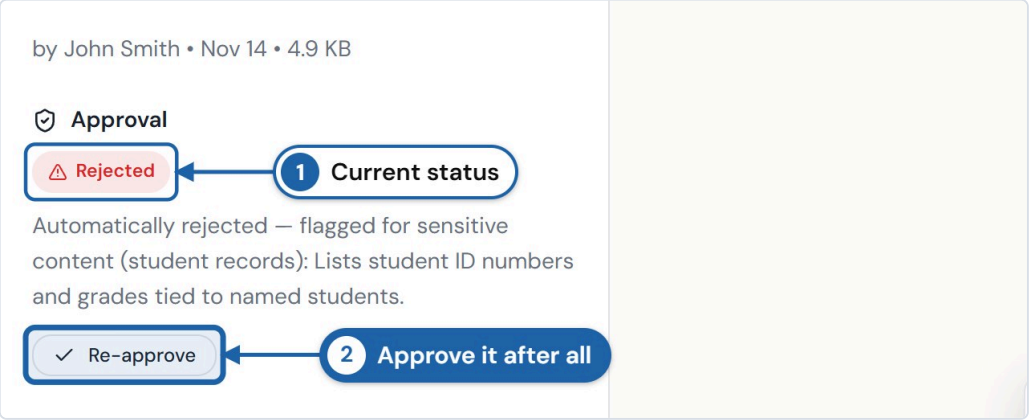


Figure 32. The **Approval** section as an administrator sees it

When screening has flagged documents it couldn't decide on, the Documents page shows a **Needs review** button with the number waiting.

To review flagged documents

1. On the **Documents** page, click **Needs review**.
   > **Result:** The list shows only flagged documents, from every folder.
2. Click **Approve** (the check mark) or **Reject** (the cross) on a row. To read the document first, click its name and decide in the **Approval** section.
   > **Result:** The document leaves the list; in the viewer, the next flagged document opens.

3. When you're done, click **Show all documents**.

7.6 If a Review Doesn't Go as Expected

Problem	Solution
No **Request Reapproval** button	Only the uploader of a rejected document sees it. Ask the uploader.
A blank form was rejected	A rare false positive. Request reapproval and choose *The AI flagged this incorrectly*.
Staff can't see a request	The document belongs to another organization. That organization's staff, or an administrator, must review it.

CHAPTER 8

Administer SmartKMS

Applies to: Administrators.

Administrators manage the accounts, organizations and branding of SmartKMS, and read its Activity Log. Settings for the whole server, such as storage, AI models and Microsoft or Google sign-in, are made by the server administrator (Appendix G, Server Administration (page 83)).

> **NOTE**
> When document storage is 80% full or more, administrators see a yellow banner at the top of every page with the space used, for example *Storage is 86% full: 12.9 GB of 15.0 GB used on MinIO*. Hide it with × until you next sign in. When storage is full, the banner turns red, can't be hidden, and new uploads are refused (each refusal is in the Activity Log). To make room, delete documents nobody needs and empty the Trash, or ask the server administrator for more space.

8.1 Managing Users

The **Users** page lists every account with its organization, role and status. Everyone who uses SmartKMS needs an account; there is no self-registration.

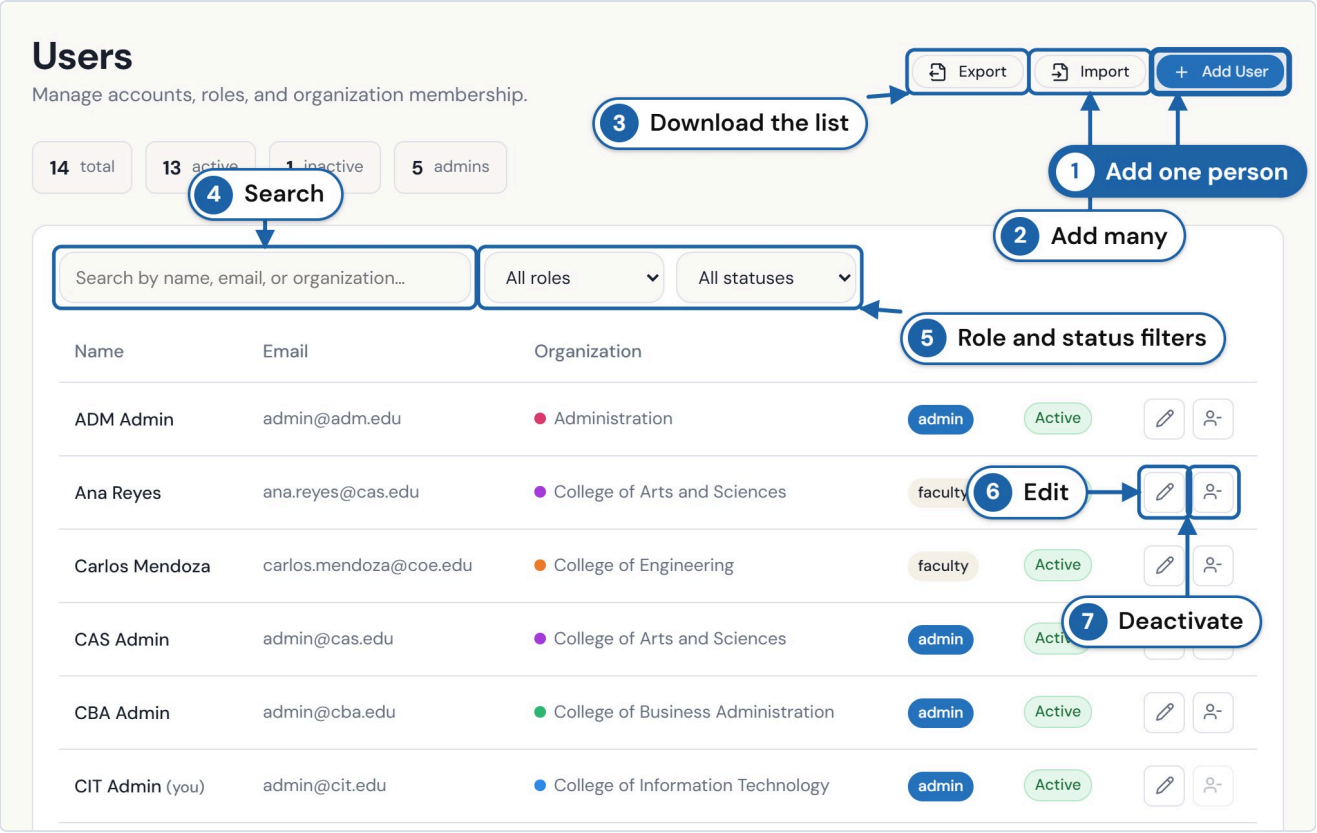


Figure 33. The Users page

No.	Item	What it does
1	**Add User**	Creates one account.
2	**Import**	Adds or updates many accounts from a spreadsheet (section 8.2, Importing and Exporting Users (page 58)).
3	**Export**	Downloads the list of users as a spreadsheet.
4	Search	Finds users by name, email address or organization.
5	Role and status filters	Shows only one role, or only active or inactive accounts.
6	Edit (pencil)	Changes the user's name, email address, organization, role or status.
7	Deactivate	Turns the account off. For an inactive account, the same button reactivates it.

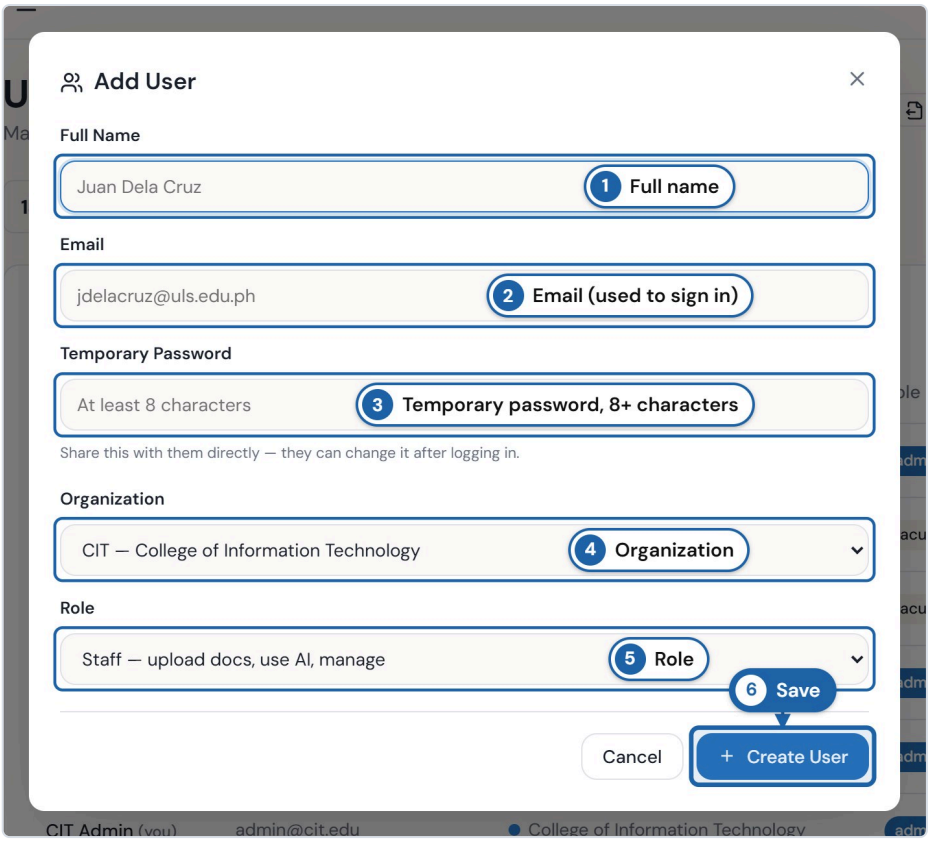


Figure 34. The **Add User** window

To add a user

Before you start: the person's name, email address, organization and role; the organization exists (section 8.3, Managing Organizations (page 59)).

1. Click **Users** in the menu, then **Add User**.
2. Fill in **Full Name**, **Email**, a **Temporary Password** of at least 8 characters, **Organization** and **Role** (Appendix B, Role Matrix (page 77)).
3. Click **Create User**.

   > **Result:** A message says *User created.* The account is listed as **Active**.

4. Give the person the SmartKMS address, their email address and the temporary password privately, and point them to section 1.1, Quick Start (page 8).

> **TIP**
> Give each person the lowest role that lets them do their work. Most people need **Faculty** or **Researcher**.

To change a user's role or organization

1. On the Users page, click the pencil icon on the user's row, change the details, and click **Save Changes**.

   > **Result:** A message says *User updated.* The new permissions apply at once; the user's menu changes the next time they sign in.

To deactivate or reactivate an account

1. Click the deactivate icon on the user's row, then click **Deactivate**.

   > **Result:** The user can no longer sign in. Their documents stay in SmartKMS.

2. To reactivate, filter to **Inactive** and click the same icon.

IMPORTANT

Accounts are deactivated, never deleted, so their documents and history are kept. You can't deactivate your own account or the last active administrator.

NOTE

Administrators can't see or set passwords on the Users page. When someone forgets their password, the server administrator sets a new one (section G.4, Everyday Server Tasks (page 86)).

8.2 Importing and Exporting Users

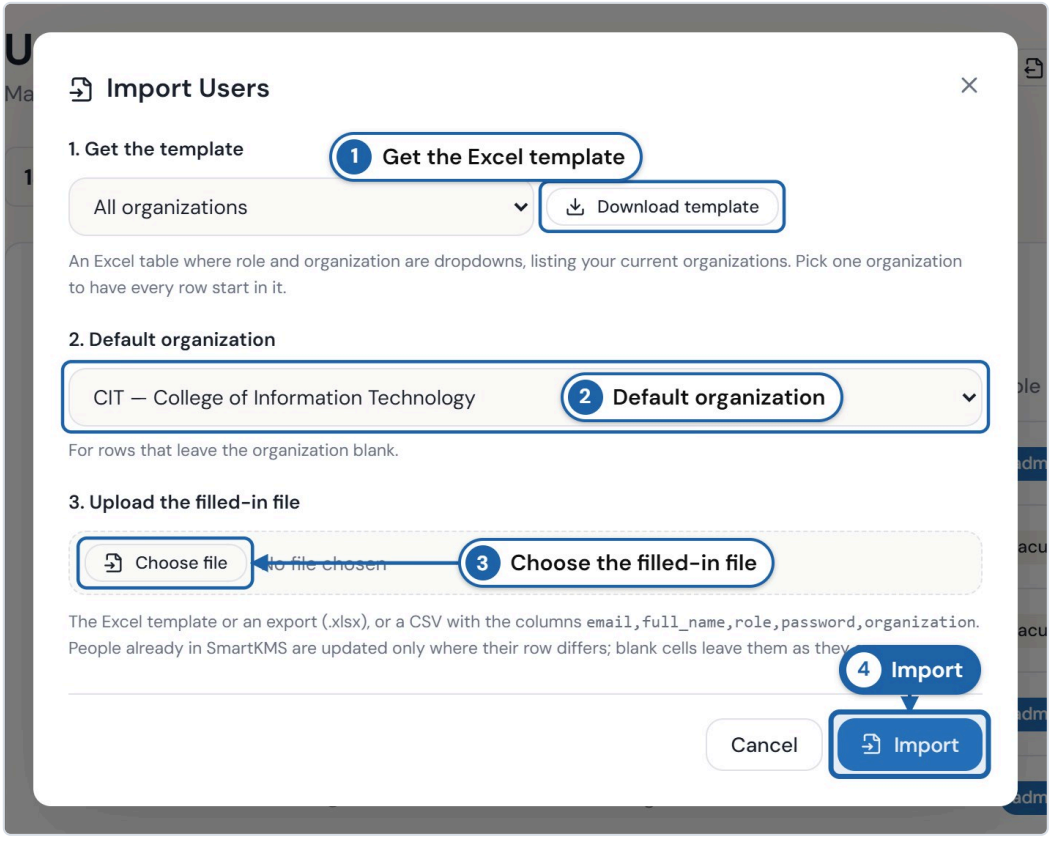


Figure 35. The **Import Users** window

No.	Item	What it does
1	**Download template**	An Excel template with drop-down lists for role and organization. Choose an organization first to fill it in on every row.
2	**Default organization**	Used for rows that leave the organization blank.
3	**Choose file**	Selects the filled-in template, an export (.xlsx), or a CSV file.
4	**Import**	Adds new people and updates existing ones.

To import many users

1. On the Users page, click **Import**, then **Download template**.
2. Fill in one row per person: email address, full name, role, and optionally a password and organization.
3. Choose the **Default organization**, click **Choose file**, select the file, and click **Import**.

   > **Result:** A summary says how many people were imported, updated and left unchanged, and lists any row that couldn't be imported, with the reason.

> **WARNING**
> A blank password gives a new person the password `changeme123`. Ask everyone imported this way to change it at once.

Existing accounts are updated only where their row differs; blank cells leave their details as they are. A CSV file works too, with the columns `email,full_name,role,password,organization`. To download the list, click **Export**, choose an organization (or all), and choose whether to include deactivated users.

8.3 Managing Organizations

Each college or office is an *organization*. Every user and document belongs to one. Organizations decide who sees **Public** documents and whom staff can manage. Open **Settings** and scroll to **Organizations**.

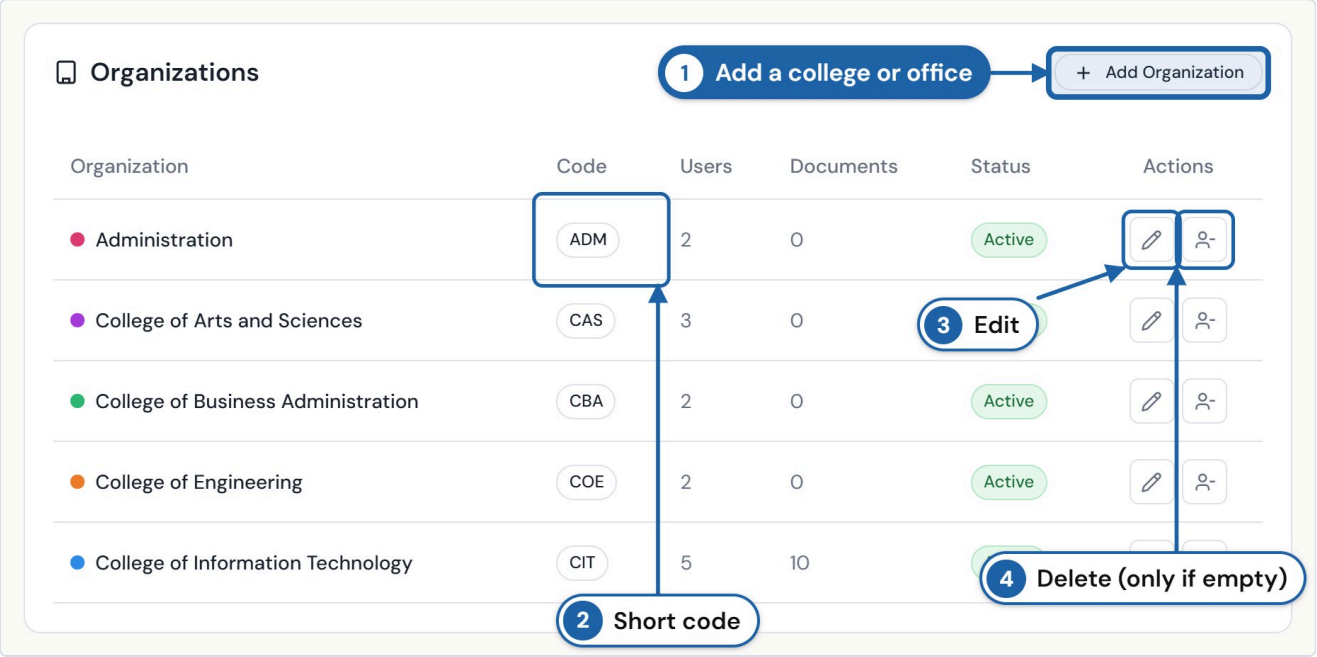


Figure 36. The **Organizations** section of Settings

No.	Item	What it does
1	**Add Organization**	Creates an organization: name, short code, description and color.
2	**Code**	The short code, such as `CIT`, shown on documents and in filters.
3	Edit (pencil)	Changes the details, or makes the organization inactive.
4	Delete	Deletes the organization. Only possible when it has no users and no documents.

To add an organization

1. In **Settings** → **Organizations**, click **Add Organization**.

2. Type the name and a short code (letters, numbers, hyphens and underscores), optionally a description, and choose a color.
3. Click **Create Organization**.

   Result: The organization can now be chosen for users and in sharing.

TIP

To retire an organization that still has users or documents, edit it and clear **Active**. Its people and documents stay, and no one new can be added to it.

8.4 Changing the Name and Logos

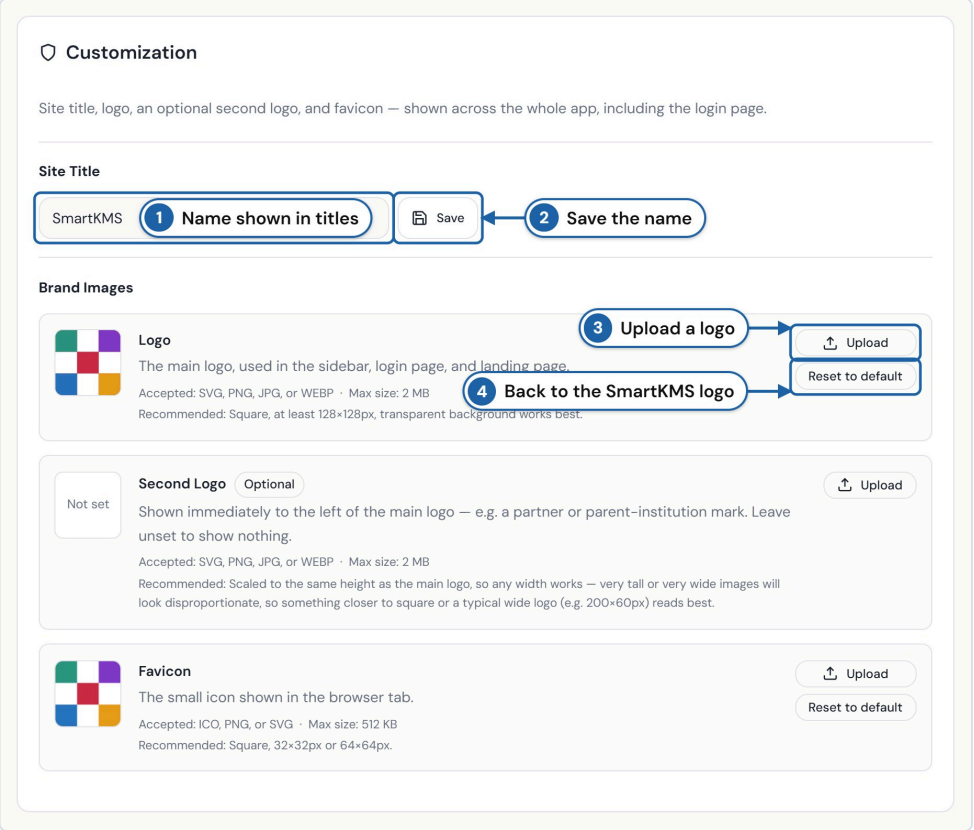


Figure 37. The **Customization** section of Settings

No.	Item	What it does
1	**Site Title**	The name shown in browser tabs and page titles.
2	**Save**	Saves the site title.
3	**Upload** (Logo)	Replaces the logo in the menu, sign-in page and home page. SVG, PNG, JPG or WebP, up to 2 MB; square works best.
4	**Reset to default**	Goes back to the SmartKMS logo.

The optional **Second Logo** appears to the left of the main logo, for example a parent institution's logo. The **Favicon** is the small icon in the browser tab (ICO, PNG or SVG, up to 512 KB). A new logo shows in other open tabs after they are refreshed.

8.5 Reading the Activity Log

The **Activity Log** records who did what, to which document or account, when, and from which IP address and browser. Use it to answer questions such as who deleted or approved a document. It covers your own organization.

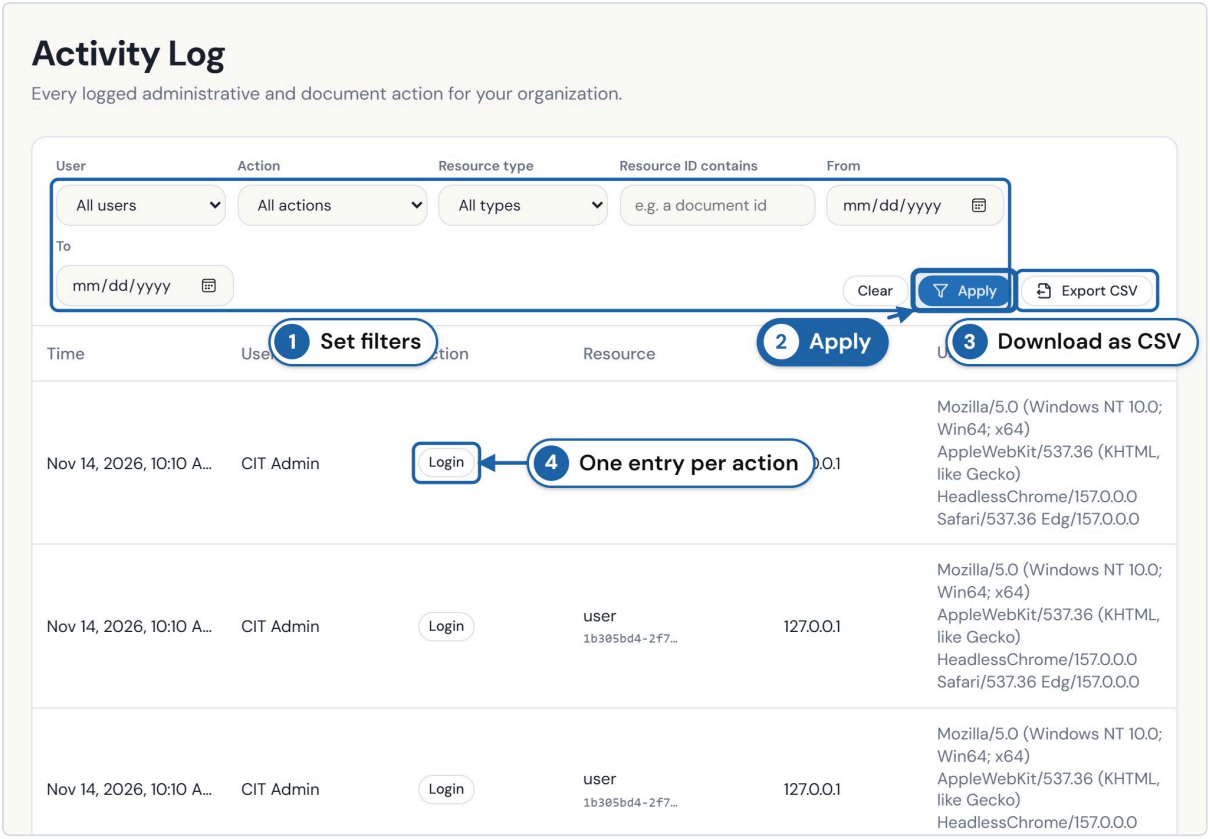


Figure 38. The Activity Log

No.	Item	What it does
1	Filters	**User**, **Action**, **Resource type**, **Resource ID contains**, and a **From** and **To** date.
2	**Apply**	Shows only matching entries. **Clear** removes the filters.
3	**Export CSV**	Downloads the filtered entries as a CSV file.
4	Entry	One action: time, user, action, resource, IP address and browser.

Recorded actions: signing in and out; uploading, cancelling, editing, restoring a version, sharing, moving to the Trash, restoring and deleting forever; changing a folder's sharing; dismissing a folder suggestion; every approval decision and reapproval request; and rating an answer. Changes made on the Users and Settings pages are not recorded.

To find and export actions

1. Click **Activity Log** in the menu.
   Result: The newest actions are listed first.
2. Choose the filters you need, for example a **User** and a date range, and click **Apply**.
3. To keep a copy, click **Export CSV**.

WARNING

Exported logs contain names, email addresses and IP addresses. Store them securely and share them only with people who need them. Records are kept for 12 months (Appendix E, Data Retention (page 81)).

8.6 Backing Up and Restoring

Applies to: Administrators.

A backup is one `.zip` file with the whole system: the database (accounts, documents' text, folders, conversations, logs and settings), every document file, profile pictures and logos. Set SmartKMS to make backups on a schedule in **Settings** → **Backup & Restore**.

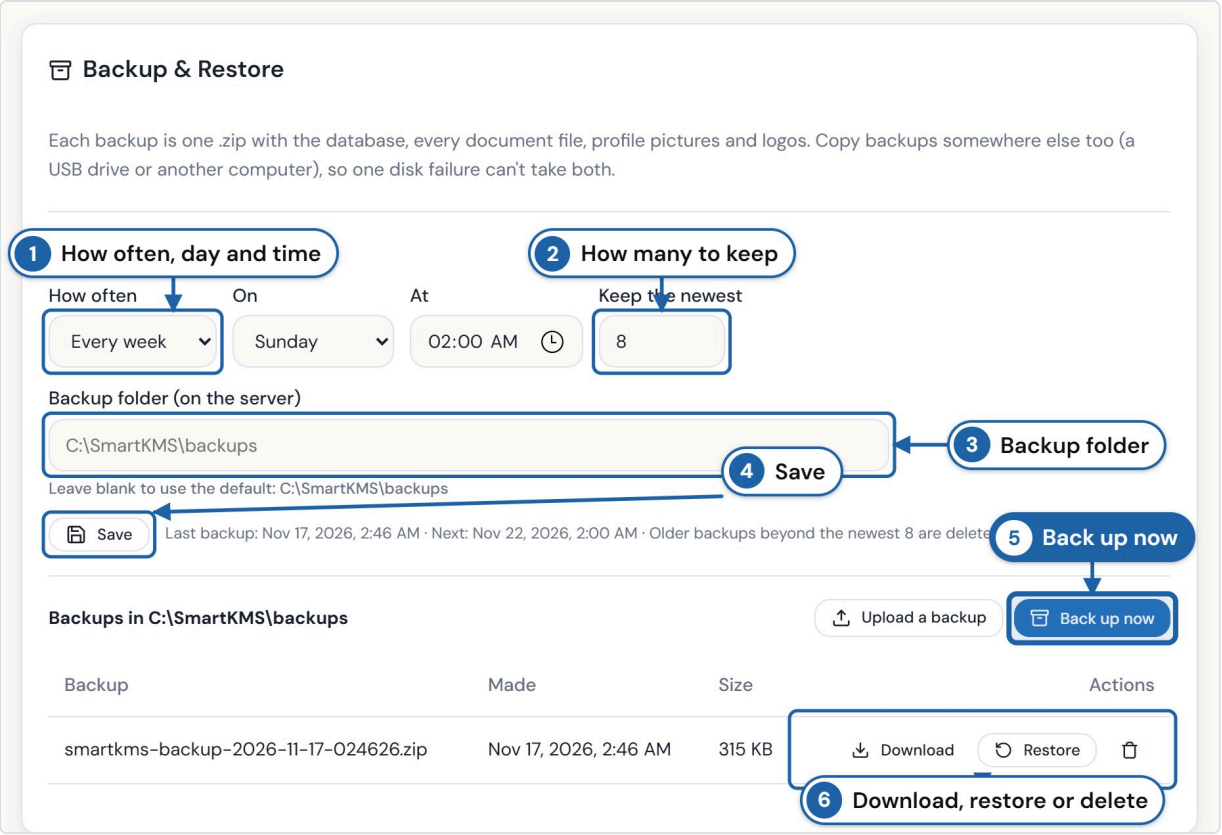


Figure 39. Settings → Backup & Restore

No.	Item	What it does
1	**How often**	**Off**, **Every day**, **Every week** (choose the day) or **Every month** (choose the date, 1 to 28), at the time you set. Times are the server's.
2	**Keep the newest**	How many backups to keep. Older ones are deleted automatically.
3	**Backup folder**	A full folder path on the server. Leave it blank for the default, the `backups` folder next to SmartKMS.
4	**Save**	Saves the schedule. The line next to it shows the last backup and the next one.
5	**Back up now**	Makes a backup straight away.
6	Backup	**Download** a copy, **Restore** it, or delete it.

To schedule backups

1. Click **Settings** and scroll to **Backup & Restore**.
2. Choose how often, the day or date, and the time, for example **Every week**, **Sunday**, **02:00**.
3. Set how many to keep, and the folder if you don't want the default.
4. Click **Save**.

   > **Result:** A message says the schedule was saved, and the card shows when the next backup will run.

To restore a backup

Before you start: tell users, because a restore signs everyone out and puts back all data as it was when the backup was made: anything added since is lost, and anything deleted since comes back.

1. To use a backup from another server, click **Upload a backup** and choose its `.zip` file.
2. Click **Restore** next to the backup.
3. Type `RESTORE` and click **Restore**.

   > **Result:** SmartKMS first makes a backup of the current data, ending `-before-restore`, then restores. When it is done, it tells you and you sign in again.

IMPORTANT

Copy backups somewhere other than the server too, for example a USB drive kept somewhere safe. A backup on the same disk as SmartKMS doesn't survive that disk failing.

WARNING

Backups contain every document and account. Download them only to devices you trust, and delete copies you no longer need.

CHAPTER 9

Your Account and Settings

Open **Settings** from the menu to manage your own account: your name and picture, your password, and how SmartKMS looks.

9.1 Updating Your Profile

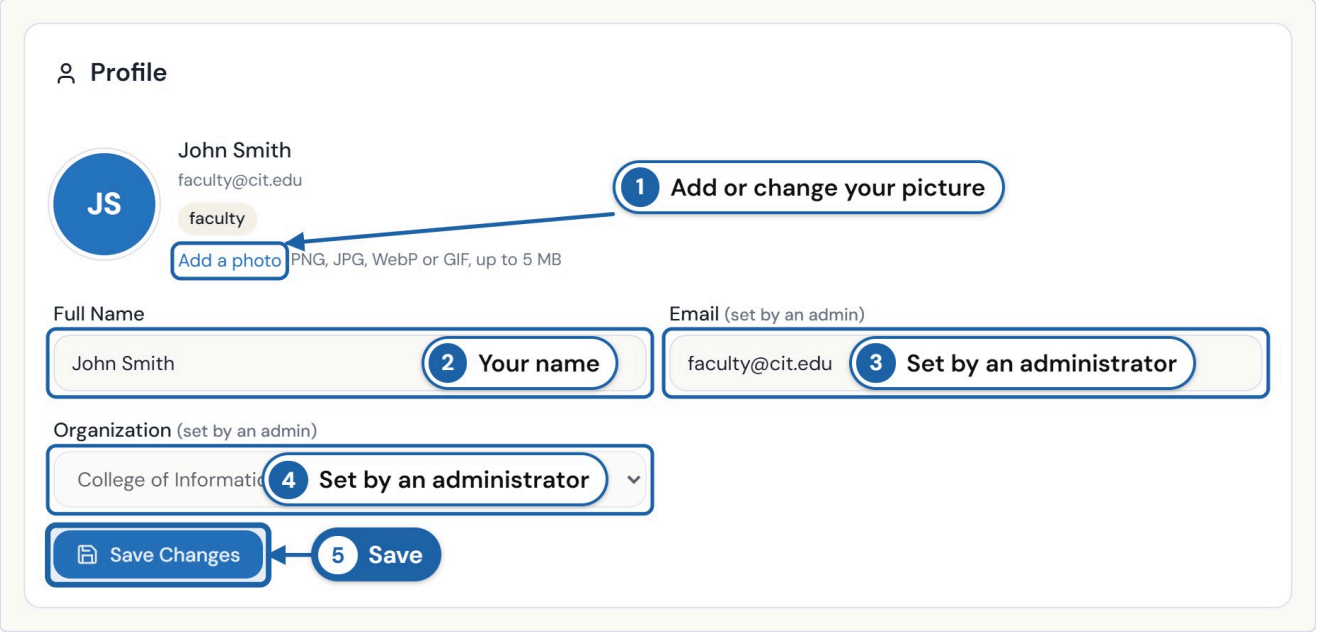


Figure 40. The **Profile** section of Settings

No.	Item	What it does
1	**Add a photo**	Uploads a profile picture (PNG, JPG, WebP or GIF, up to 5 MB). **Remove** goes back to your initials.
2	**Full Name**	Your name as others see it.
3	**Email**	The address you sign in with. Only an administrator can change it.
4	**Organization**	Your organization. Only an administrator can change it, or your role.
5	**Save Changes**	Saves your name.

To change your name or picture

1. Click **Settings** in the menu.
   > **Result:** Settings opens at **Profile**.
2. Edit **Full Name** and click **Save Changes**.
   > **Result:** A message says *Profile saved!*

3. To add a picture, click **Add a photo** (or the circle with your initials), choose a picture, and click **Open**. A square picture looks best.

   Result: Your picture replaces your initials in the menu and next to your documents.

NOTE

To change your email address, ask an administrator. Microsoft and Google sign-in find your account by its email address, so only an administrator can change it. Sign in with the new address from then on.

9.2 Changing Your Password

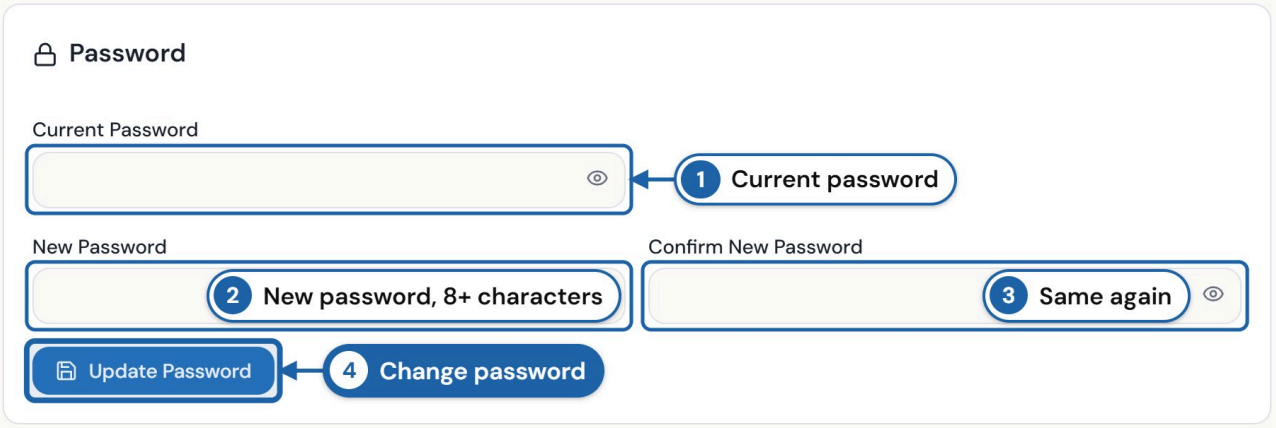


Figure 41. The **Password** section of Settings

No.	Item	What it does
1	**Current Password**	The password you use now. Each field has an eye icon that shows what you typed.
2	**New Password**	Your new password (see the rules below).
3	**Confirm New Password**	The new password again, to catch typing mistakes.
4	**Update Password**	Saves the new password.

To change your password

Before you start: you know your current password. If you don't, ask your administrator to set a new one.

1. Click **Settings** in the menu and scroll to **Password**.
2. Type your current password, then the new password in both **New Password** and **Confirm New Password**.
3. Click **Update Password**.

   Result: A message says *Password updated.*

Password rules

- At least 8 characters: any letters, numbers, spaces and symbols. Passwords are case-sensitive.
- The new password must be different from the current one.
- Five wrong passwords in a row lock the account for 15 minutes.
- There is no self-service reset. If you forget your password, your administrator arranges a new one.

> **TIP**
> A good password is long, easy for you to remember and hard to guess, for example three or four unrelated words with a number: `river-lamp-7-orange`. Don't reuse a password from another website.

> **WARNING**
> Never share your password, including with colleagues or anyone who says they are from IT. Administrators never need your password to help you.

9.3 Appearance and Display

Make SmartKMS comfortable to read: light or dark mode, a color theme, larger text or tighter spacing. These settings apply only to you, in the browser you are using, and take effect at once; there is no Save button.

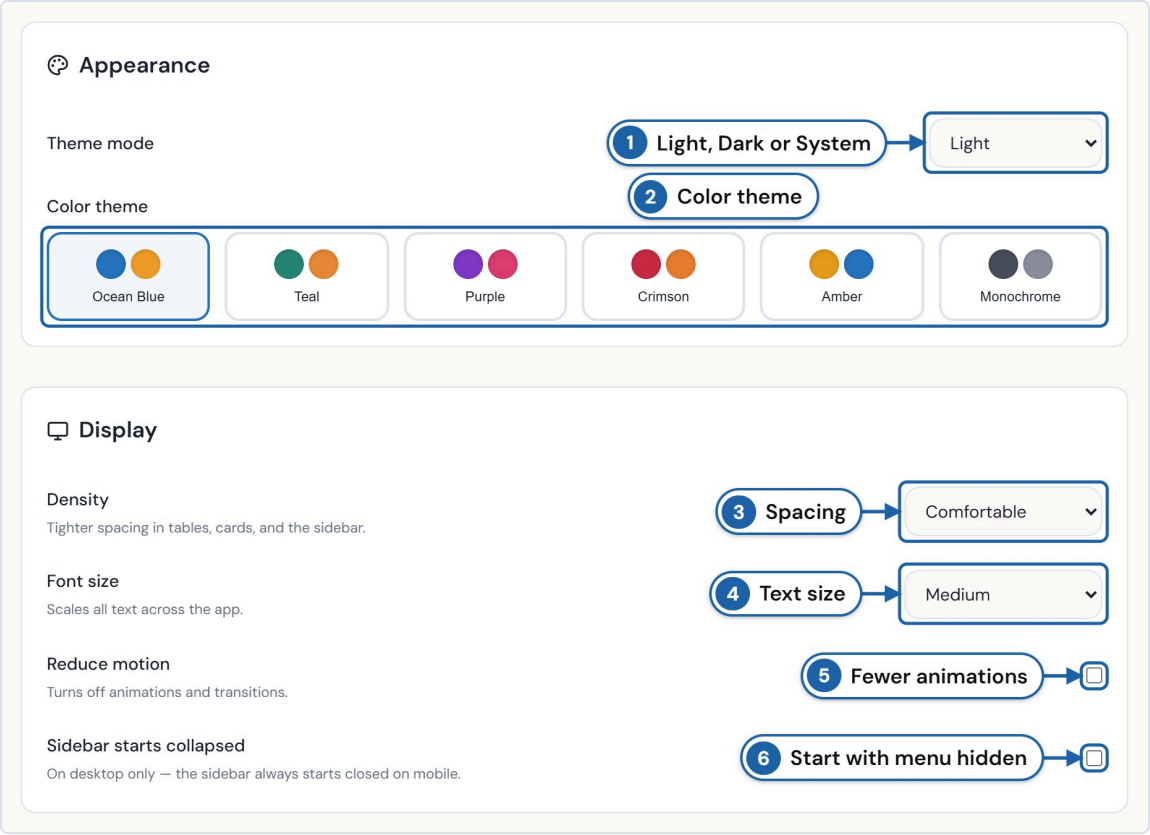


Figure 42. The **Appearance** and **Display** sections of Settings

No.	Item	What it does
1	**Theme mode**	**Light**, **Dark**, or **System** to follow your device.
2	**Color theme**	The accent color: Ocean Blue, Teal, Purple, Crimson, Amber or Monochrome.
3	**Density**	**Comfortable** or **Compact** spacing.
4	**Font size**	**Small**, **Medium** or **Large** text everywhere.
5	**Reduce motion**	Turns off animations.
6	**Sidebar starts collapsed**	Starts every page with the menu shrunk (computers only).

TIP

If text is hard to read, choose **Large** font size, or zoom the page with `Ctrl` + `+` (`Cmd` + `+` on a Mac).

CHAPTER 10

Troubleshooting and Help

10.1 Troubleshooting

Each chapter ends with the problems specific to it. These are the general ones.

Problem	Try this
SmartKMS doesn't open	Check the address and your network connection. If colleagues can't open it either, the server is down: tell your administrator.
A page looks broken or doesn't update	Refresh the page (`F5`, or `Cmd` + `R` on a Mac). Then log out and in again, or try another supported browser.
I'm signed out unexpectedly	Sessions end when the browser closes unless you selected **Keep me signed in for 7 days**. Clearing cookies also signs you out.
A menu item or button described here is missing	Your role doesn't include it (section 1.7, Roles: What You Can Do (page 16)).
Processing, search or answers never finish	Wait five minutes, then tell your administrator: the AI service may be stopped.

10.2 Messages and What They Mean

Every message SmartKMS shows, by where you see it.

Message	Where	What to do
Incorrect email or password. Please try again.	Sign-in	Retype both. Check `Caps Lock` and use the eye icon.
Account locked due to too many failed login attempts. Try again in N minutes.	Sign-in	Wait the minutes shown (up to 15), or ask an administrator to unlock it.
Account is deactivated	Sign-in	Ask your administrator to reactivate your account.
".xyz" files are not supported.	Upload	Save the file as PDF, Word, Excel, CSV, PowerPoint, PNG or JPG.
File is too large (...). Maximum allowed size is 500 MB.	Upload	Compress or split the file, or save a PDF with lower-resolution pictures.
SmartKMS's storage is full, so "..." can't be saved (...). Ask an administrator to free up space.	Upload	Tell an administrator. Nothing was stored; upload again once they have made room.
The selected file is empty (0 bytes).	Upload	Check that you chose the right file.

Message	Where	What to do
Upload failed: …	Upload	Read the rest of the message. If it mentions file storage, try later and tell your administrator.
This document has already finished processing — cancel only applies to in-progress uploads.	Upload	Too late to cancel. Delete the document instead.
Only the owner or an admin can delete this file.	Viewer	Ask the uploader or an administrator.
Downloading this document isn't allowed for you.	Viewer, search	The owner turned off downloads for you.
This file type can't be opened in the document editor.	Viewer	Pictures can be viewed but not edited.
The document editor isn't loading	Viewer	Turn off ad blockers for SmartKMS, then click **Reload**.
The editor says the security token is not correctly formed	Viewer	A server setting. Tell your administrator.
No SmartKMS account for: …	Sharing	The person needs an account first. Ask an administrator.
Access denied	Anywhere	Your role or the document's visibility doesn't allow this.
Document not found	Anywhere	It was deleted, or you no longer have access.
A reapproval request for this document is already pending review.	Reapproval	Wait for the decision.
Select at least one reason or add a description	Reapproval	Select a reason or explain in the description.
The local AI model is not running…	Q&A Assistant	The AI service is stopped. Tell your administrator.
Sorry, something went wrong while generating a response.	Q&A Assistant	Send the question again. If it keeps happening, tell your administrator.
I'm not able to respond to that message — it was flagged by this app's content safety filter.	Q&A Assistant	The message looked harmful. If that's a mistake, rephrase it.
This answer was interrupted before it finished.	Q&A Assistant	Click **Ask again**.
Hang on — this answer is still being saved.	Q&A Assistant	Wait a moment, then rate the answer again.
Fill in all password fields.	Settings	Fill in all three password fields.

Message	Where	What to do
New password must be at least 8 characters.	Settings	Choose a longer password.
New passwords do not match.	Settings	Type the same new password in both fields.
New password must be different from the current one.	Settings	Choose a password you haven't been using.
A message that the current password is wrong	Settings	Retype it. If you've forgotten it, ask your administrator.
Picture is too large (max 5 MB).	Settings	Use a smaller picture.
Only an administrator can change your organization.	Settings	Ask an administrator.
Cannot delete org with existing users or documents	Settings	Make the organization inactive instead.
You cannot deactivate your own account	Users	Ask another administrator.
Create (or reactivate) an organization in Settings before adding users.	Users	Add an organization first (section 8.3, Managing Organizations (page 59)).
Upload the .xlsx template or a .csv file.	Users	Save the file as .xlsx or .csv.
That file is empty.	Users	Fill in at least one row.
A message that the email address is already in use	Users	The person already has an account. Find and edit it instead.
This document has been archived and is no longer available.	Opening a link to a document	Its uploader archived it. Ask them, or an administrator, if you still need it.
This document is already archived.	Archive	It is in the Archive already: click **Archive** in the menu.
A backup or restore is already running.	Settings → Backup & Restore	Wait a few minutes for it to finish, then try again.
The server can't write to that folder...	Settings → Backup & Restore	Choose a folder the server can write to, or leave the box blank for the default.
Enter a full folder path...	Settings → Backup & Restore	Type the whole path, starting with a drive letter on Windows (`D:\SmartKMS Backups`) or `/` on Linux.
This file is not a SmartKMS backup...	Upload a backup	Choose a `.zip` made by SmartKMS's own Backup & Restore.

Message	Where	What to do
Not restored: type RESTORE exactly to confirm.	Restore	Type `RESTORE` in capital letters.
Couldn't make a backup of the current data first, so nothing was restored...	Restore	Usually the backup folder is full or file storage is down. Fix that, then restore again.
Restore failed, nothing was changed...	Restore	The data is as it was. Try again; if it keeps failing, tell the server administrator the message.

10.3 Where to Check for Updates

SmartKMS doesn't send email, text messages or push notifications. It tells you what happened with short messages at the corner of the screen (green for success, red for problems), and with status labels on documents and requests. When you're waiting for something, check here:

You are waiting for...	Check
An upload to finish	The document's status on the Documents page
A decision on your reapproval request	The document's **Approval** status in the viewer
A document someone shared with you	Your Documents list or AI Search
Requests to review (staff and administrators)	The **Reapprovals** page

> **TIP**
> When you share a document or decide a request, tell the person yourself, so they know to look.

10.4 Frequently Asked Questions

Who can see the documents I upload?

> Only you, until you change the visibility (section 4.1, Who Can See a Document (page 32)).

Are my documents sent to ChatGPT or another outside AI service?

> No. All AI processing runs on the university's own server.

Why was my document rejected?

> It appears to contain personal information. The reason is shown in the viewer. If it's wrong, request a review (section 7.3, When Your Document Is Rejected (page 47)).

Can I get back a document I deleted?

> Yes, within 30 days, from the Trash (section 6.3, Restoring Documents from the Trash (page 44)).

Why do my colleague and I get different answers to the same question?

> The Q&A Assistant uses only the documents each person can see.

Who can see my questions to the Q&A Assistant?

> Your conversations are private. Administrators can see in the Activity Log that you rated an answer, and Analytics counts search words without names.

Can I use SmartKMS on my phone?

> Yes, in a current mobile browser (section 1.6, Using SmartKMS on a Phone or Tablet (page 15)).

How long does processing take?

> Usually 30 to 60 seconds per document; longer for large or scanned files.

10.5 How SmartKMS Uses AI

SmartKMS uses AI to summarize and tag documents, find them by meaning, answer questions and screen uploads. Everything it writes is labelled, and every AI model runs on the university's own server. **Help → How SmartKMS uses AI** in the account menu lists each model and what it does, what it sees, what it can get wrong, where people decide, and how to disagree with a result. It also explains how SmartKMS follows the transparency principles of the EU AI Act.

To see how one answer was made, click the question-mark button under it (section 2.4, Asking the Q&A Assistant (page 20)). To see how a document's approval was decided, open **How this was decided** in its Approval section (section 7.3, When Your Document Is Rejected (page 47)).

10.6 Getting Help

The **Support** page, linked from the bottom of the home page, has buttons to report a bug and to open the online documentation.

For...	Contact
Accounts, passwords, roles, access, approvals and organization policy	Your administrator
The server being down, slow, or showing errors for everyone	Your institution's IT office or the server administrator
Bugs and feature requests	The issue tracker: `github.com/nncast/fastapi-smartkms/issues` (**Open an Issue** on the Support page)
Security vulnerabilities	Privately, through **Security → Report a vulnerability** on the SmartKMS repository. Never in a public issue.
This manual and the online documentation	`nncast.github.io/smartkms-docs`

When you report a problem, include what you were doing and what happened instead, the exact message or a screenshot, the date and time, your browser and device, and the document or page involved.

WARNING

Never include passwords, the server's `.env` file, key files or confidential documents in a report or screenshot.

APPENDIX A

Glossary

Term	Meaning
Access	The section of the document viewer that shows who can see a document, and where Shared and Cross-Org sharing is managed
Administrator	The role with full access to every organization, user and setting. Shown as **Admin** in role lists.
AI Search	The page that finds documents by meaning as well as by keywords
AI summary	A short description of a document, written automatically when it is uploaded or edited
Archive	Where outdated documents are kept, hidden from everyone but their uploader and administrators, until retrieved
Approval status	Whether a document is Analyzing, Pending, Approved or Rejected
Cross-Org	The visibility setting that shares a document with your organization and other organizations you choose
Dashboard	The first page after sign-in, with shortcuts and recent items
Folder	A container for documents with its own visibility. Everyone who can open a folder can open the documents in it.
Global	The visibility setting that makes a document available to everyone in every organization
Key points	The main sentences of a document's summary, shown as a list
Knowledge base	All the documents stored in SmartKMS
Knowledge gap	A search that found no documents, pointing to information that may be missing
Organization	A college or office. Every user and document belongs to one.
Private	The visibility setting that limits a document to its uploader and administrators
Public	The visibility setting that shares a document with everyone in its organization
How this was decided	The record under a document's approval of each automatic check, what it found, and any person's decision
Q&A Assistant	The page that answers questions from your documents
Reapproval request	An uploader's request to review a rejected document
Related documents	Documents on similar topics, listed in the viewer
Role	Researcher, Faculty, Staff or Administrator: decides what a user can do
Screening	The automatic check of new documents for sensitive personal information

Term	Meaning
Semantic search	Searching by meaning rather than by exact words
Server administrator	The person who installs and runs the SmartKMS server. Not a role in SmartKMS.
Shared	The visibility setting that limits a document to the people you add
Source document	A document that a Q&A Assistant answer was based on
Tag	A short topic word attached to a document
Trash	Where deleted documents wait 30 days, restorable by their uploader or an administrator
Version history	The saved versions of an edited document, which can be restored
View-only	A document that can be opened but not downloaded
Visibility	The setting that decides who can find and open a document or folder
Why this answer?	The explanation under a Q&A answer of what it was based on and how its sources were chosen

APPENDIX B

Role Matrix

"Own" means documents you uploaded. "Organization" means your own organization.

Action	Researcher	Faculty	Staff	Administrator
Documents				
Find, open and preview documents visible to you	Yes	Yes	Yes	Every organization
See documents that are rejected or still being checked	Own	Own	Own, and those their visibility includes	Yes
Download (unless view-only or not allowed)	Yes	Yes	Yes	Yes
Upload documents	No	Yes	Yes	Yes
Edit document content and restore versions	If shared Can edit	Own, or shared Can edit	Own, organization, or shared Can edit	Yes
Rename, delete, change visibility, make view-only	No	Own	Own	Yes
Archive and retrieve	No	Own	Own	Yes
Restore from the Trash, delete forever	No	Own	Own	Yes
Add and remove tags; move to folders	No	Own	Own	Yes
Create folders	No	Yes	Yes	Yes
Rename, share and delete folders	No	Any they can see in their organization	Any they can see in their organization	Any they can see in their organization
Open folders shared with them	Yes	Yes	Yes	Every organization
Search and Q&A				
AI Search and Q&A Assistant	Yes	Yes	Yes	Yes
Review				
Request reapproval of a rejected document	—	Own	Own	—

Action	Researcher	Faculty	Staff	Administrator
Review reapproval requests	No	No	Organization	Every organization
Approve, reject or re-approve from the viewer	No	No	No	Yes
Reports and administration				
Analytics	No	Organization	Organization	Organization
Activity Log	No	No	No	Organization
Users: add, edit, deactivate, import, export	No	No	No	Yes
Organizations and branding	No	No	No	Yes
Backup & Restore	No	No	No	Yes
Your account				
Change own name, email, picture, password and display	Yes	Yes	Yes	Yes
Change own organization or role	No	No	No	Yes

APPENDIX C

Keyboard Shortcuts

Where	Keys	What they do
Sign-in, AI Search, Q&A Assistant	Enter	Signs in, searches, or sends your question
Q&A Assistant	Shift + Enter	Starts a new line in your question
Renaming a conversation or document	Enter / Esc	Saves the new name / cancels
Document viewer, tags	Enter or Space	Adds the tags you typed
Documents page, Trash	Ctrl +click, Shift +click, Ctrl + A, Esc	Adds one to the selection, selects a range, selects all, clears the selection
Share window, name list	↓ / ↑, Enter, Esc	Moves through the suggested people, picks one, closes the suggestions
Windows and menus	Esc	Closes the open window or menu
Any page	Tab / Shift + Tab	Moves to the next / previous button or field
Any page	Ctrl + + / Ctrl + − (Cmd on a Mac)	Zooms the page in / out

On a Mac, use Cmd wherever this table says Ctrl.

APPENDIX D

System Requirements

SmartKMS runs on a server at the university. You use it through a web browser, so there is nothing to install on your computer or phone. Server requirements are in section G.1, Server Requirements (page 83).

Item	Requirement
Device	A desktop computer, laptop, tablet or smartphone, with a screen of any size
Browser	A current version of Google Chrome, Microsoft Edge, Mozilla Firefox or Apple Safari (on phones and tablets: Chrome or Edge on Android and iOS, Firefox on Android, Safari on iOS and iPadOS), with JavaScript and cookies turned on
Network	The campus network, or the address your administrator gives you for off-campus use
Account	A SmartKMS account created by an administrator
Other software	None. Documents open and can be edited inside SmartKMS.

NOTE

SmartKMS remembers your sign-in and display settings in your browser. Clearing your browser's cookies and site data signs you out and resets them. Keep your browser up to date; older browsers may not show the editor or previews correctly.

APPENDIX E

Data Retention

These periods come from Section 13 of the SmartKMS Terms & Conditions (version 1.9.0). If your institution's own records policy sets different periods, that policy applies.

Data	Kept for
Account data	The life of the account, plus 30 days after deactivation
Documents and their extracted text	Until deleted by the uploader or an administrator, subject to your institution's records policy
Archived documents	Until retrieved, moved to the Trash or deleted by the uploader or an administrator
Screening and review records (*How this was decided*)	As long as the document
Deleted documents (in the Trash)	30 days, then permanently removed from storage
Q&A conversations, with each answer's explanation and follow-up questions	Until you delete them, or 24 months without activity
Answer ratings	Until the rating is cleared or the conversation is deleted
Dismissed folder suggestions	Until the document or folder is deleted
Search logs and analytics	24 months, then summarized or deleted
Activity (audit) and security logs	12 months, or longer when required for legal or investigative purposes
Backups	Made on the schedule an administrator sets, and kept until deleted or replaced by newer ones under the limit the administrator sets. Copies of deleted data stay in backups made before the deletion.

To ask for access to, correction of, or deletion of your personal data, contact your institution's Data Protection Officer or your administrator. The full terms are under **Help → Terms of Service** in the account menu.

APPENDIX F

Acronyms

Acronym	Stands for	In SmartKMS
AI	Artificial intelligence	The summaries, tags, search and answers, all run on the university's server
CSV	Comma-separated values	A simple spreadsheet file format, used for uploads, user import and log exports
DPO	Data Protection Officer	The person at your institution responsible for personal data
HTTPS	Hypertext Transfer Protocol Secure	The encrypted connection your browser uses to reach SmartKMS
IP address	Internet Protocol address	The network address of a computer, recorded in the Activity Log
KMS	Knowledge management system	The kind of system SmartKMS is
MB, GB	Megabyte, gigabyte	File sizes: uploads can be up to 500 MB
OCR	Optical character recognition	Reading text from scanned pages and pictures
PDF	Portable Document Format	A common document file type
RAG	Retrieval-augmented generation	How the Q&A Assistant works: it finds relevant passages first, then writes an answer from them
SSO	Single sign-on	Signing in with your Microsoft or Google account, where available

APPENDIX G

Server Administration

Applies to: the server administrator. Full, current instructions are in the Installation and Configuration sections of the online documentation.

G.1 Server Requirements

Component	Minimum	Recommended
Operating system	Windows 10 or 11, macOS, or Linux (Ubuntu)	
Processor	4 cores, 3.0 GHz	8 cores
Memory (RAM)	16 GB	32 GB
Storage	256 GB SSD	512 GB SSD or more, depending on the number of documents
Graphics card	Not required	A dedicated GPU makes AI answers and processing faster
Software	PostgreSQL 16 with pgvector, Docker Desktop, Ollama (about 7 GB of AI models) and uv, which installs Python 3.11 or later	
Network	Campus network access for users; HTTPS in production. The internet is needed only to download software and models, for remote access, and when Google Drive storage is used.	

G.2 Installing with the Launcher

To install SmartKMS

Before you start: PostgreSQL 16 with pgvector (note the `postgres` password), Docker Desktop running, Ollama installed, and the SmartKMS project folder.

1. In the project folder, copy `.env.example` to `.env` and set your PostgreSQL password in `DATABASE_URL`.
2. Open a terminal in the project folder and run `start.bat` (Windows) or `./start.sh` (macOS or Linux).

   > **Result:** The launcher shows its menu (Figure 43 (page 84)). On macOS and Linux, it first checks the required software.

3. Type `2` for **Full Install** and press Enter.

4. When asked where documents should be stored, press **Enter** for MinIO (on your own server, recommended), or type `2` for a Google Drive folder (Figure 44 (page 85)).

   > **Result:** The launcher installs everything, downloads the AI models and starts SmartKMS. The first run downloads several gigabytes.

5. Open `http://localhost:8000` in a browser and sign in with a demo administrator account (section G.3, Demo Accounts (page 85)).

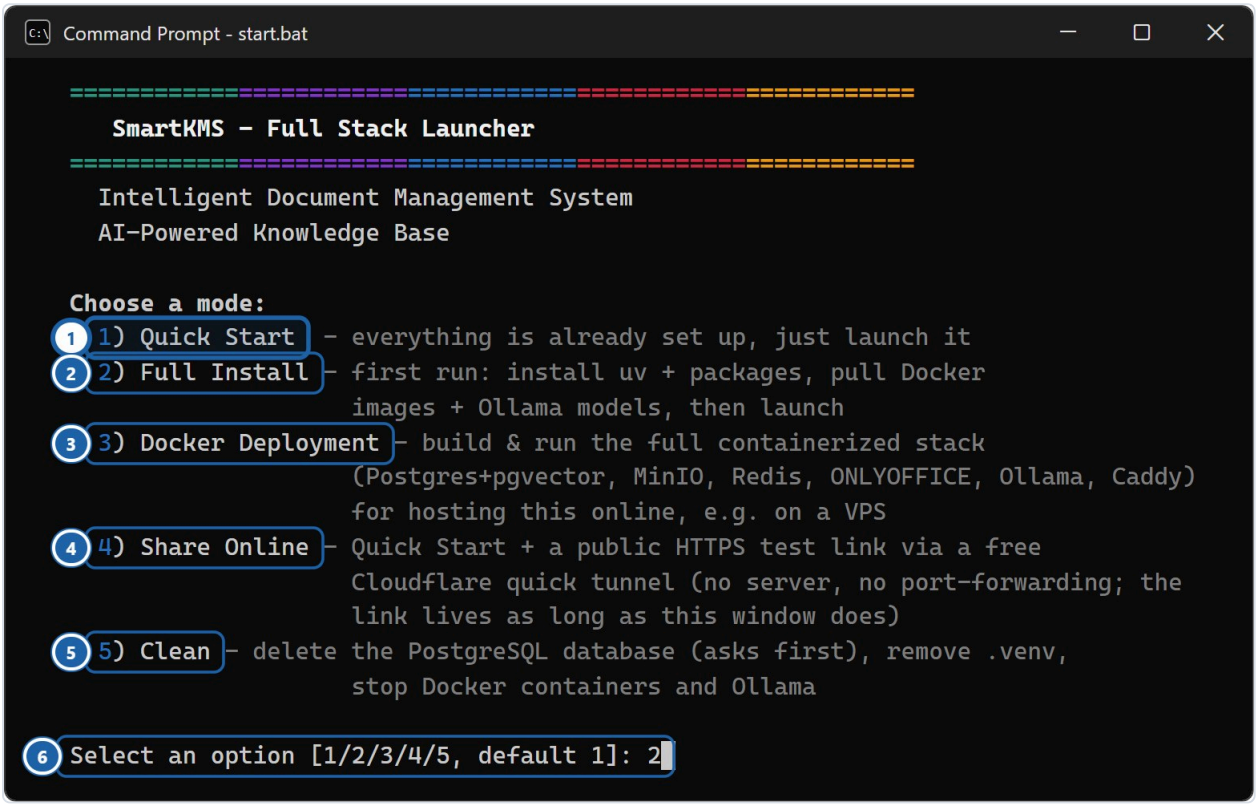


Figure 43. The launcher's menu

No.	Option	What it does
1	**1) Quick Start**	Starts everything already installed: it opens Docker Desktop if it is closed, applies any database changes from an update, and starts SmartKMS. Use it every day, and after updating SmartKMS.
2	**2) Full Install**	Installs or updates the packages, Docker images and AI models, creates the database with the demo accounts and starts SmartKMS. Use it the first time.
3	**3) Docker Deployment**	Runs the whole system, including the database and HTTPS, in Docker on a server.
4	**4) Share Online**	Starts SmartKMS with a temporary public HTTPS link for a demonstration. The link stops when the window closes.
5	**5) Clean**	Removes the Python environment and stops the Docker containers and Ollama. On Windows, it also offers to delete the SmartKMS database and asks you to type its name first.
6	Prompt	Type the option's number and press **Enter**.

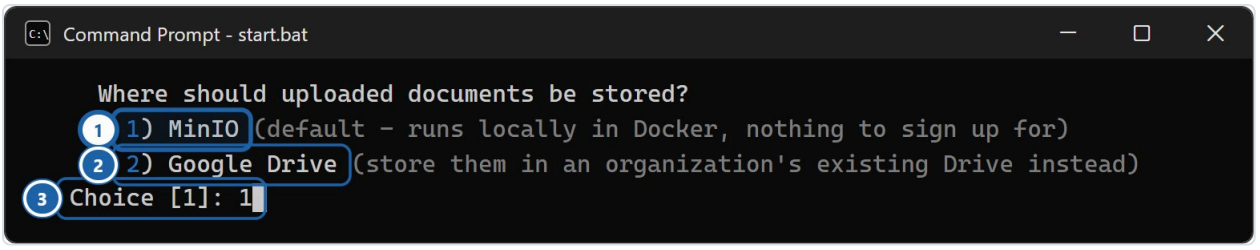


Figure 44. The launcher's storage question, asked once on a new installation. For Google Drive, it then asks for the service-account key file and the folder address.

> **WARNING**
> Never share the `.env` file or a Google service-account key file. They hold the database password and the keys that sign everyone's sign-ins.

G.3 Demo Accounts

A new installation creates one administrator for each demo organization and one account for each other role. A production installation (`APP_ENV=production`) creates none.

Account	Password	Role
`admin@cit.edu`	`Admin@CIT2026`	Administrator (College of Information Technology)
`admin@cas.edu`	`Admin@CAS2026`	Administrator (College of Arts and Sciences)
`admin@coe.edu`	`Admin@COE2026`	Administrator (College of Engineering)
`admin@cba.edu`	`Admin@CBA2026`	Administrator (College of Business Administration)
`admin@adm.edu`	`Admin@ADM2026`	Administrator (Administration)
`staff@cit.edu`	`Staff@2026`	Staff
`faculty@cit.edu`	`Faculty@2026`	Faculty
`researcher@cit.edu`	`Researcher@2026`	Researcher

> **WARNING**
> These passwords are published. Deactivate the demo accounts, or change their passwords, before the system holds real documents.

G.4 Everyday Server Tasks

Task	How
Start SmartKMS each day	Start Docker Desktop (and PostgreSQL if it doesn't start itself), run the launcher and choose **1) Quick Start**. Keep the launcher window open.
Reset a forgotten password	`uv run python scripts/reset_password.py user@school.edu` in the project folder. You are asked for the new password.
Unlock a locked account early	`uv run python scripts/reset_password.py user@school.edu --unlock-only`
Check that SmartKMS and its AI service are running	Open `/health` on the server, for example `http://localhost:8000/health`. It also shows the SmartKMS version.
Change server settings (storage, AI models, Microsoft or Google sign-in, upload limit)	Edit `.env` and restart. Every setting is explained in the file and in the Configuration section of the online documentation.
Recover a replaced document	A replaced document stays in the database and storage with the status `archived`. Change its status back to `approved` in the database, or restore it from the latest backup.

G.5 Backing Up the Server

A complete backup has four parts: the PostgreSQL database (accounts, document text, summaries, conversations, logs), the stored files (MinIO, or the Google Drive folder), profile pictures, and logos. The easiest way to back up all four together is **Settings → Backup & Restore** (section 8.6, Backing Up and Restoring (page 62)): schedule it at least daily, and copy the backups to a separate, secure place. The commands below make the same kind of backup by hand.

To back up a Docker deployment

Before you start: shell access to the server, in the SmartKMS folder.

1. Run, one at a time:

```
docker run --rm -v smartkms_postgres_data:/v -v "$PWD":/b alpine tar czf
/b/postgres.tgz -C /v .
docker run --rm -v smartkms_minio_data:/v    -v "$PWD":/b alpine tar czf
/b/minio.tgz    -C /v .
docker run --rm -v smartkms_avatars_data:/v  -v "$PWD":/b alpine tar czf
/b/avatars.tgz  -C /v .
docker run --rm -v smartkms_branding_data:/v -v "$PWD":/b alpine tar czf
/b/branding.tgz -C /v .
```

> **Result:** Four files appear in the folder: `postgres.tgz`, `minio.tgz`, `avatars.tgz` and `branding.tgz`.

2. Copy the four files to secure storage away from the server.

For a launcher installation, back up the database with `pg_dump` (for example `pg_dump -Fc dbskms > dbskms.dump`), MinIO's data, and the project's `static/images/avatars` folder. With Google Drive storage, the files are covered by the institution's own Drive retention.

> **IMPORTANT**
> Test a restore at least once a term on a separate machine. A backup that has never been restored can't be relied on.

> **WARNING**
> Backups contain every document and account. Encrypt them and limit who can access them. Also keep a secure copy of the server's `.env` file, which holds the keys needed to run the restored system.