## Welcome to Synaptica KMS version 9.0

This document reviews some of the key differences and enhancements present in Synaptica's KMS version 9.0 release. There are a number of substantial changes to the interface and some functional areas, all with the goal of providing a more user-friendly and efficient experience to the end-user. We hope that you enjoy this new release and, as always, welcome your comments and feedback for consideration in future releases.

Please note that fully revised documentation is available to you for review prior to initiating the upgrade process. Synaptica LLC is also able to provide access to a KMS v9.0 system for review prior to upgrade for users to become familiar with the new interface. Please contact support@synaptica.com for additional details on either of these options.

New User Interface Layout

Synaptica KMS v9.0 revises the layout of display, search, and editorial areas. Access to Tools and Reports has also been changed to streamline access and editorial workflow.
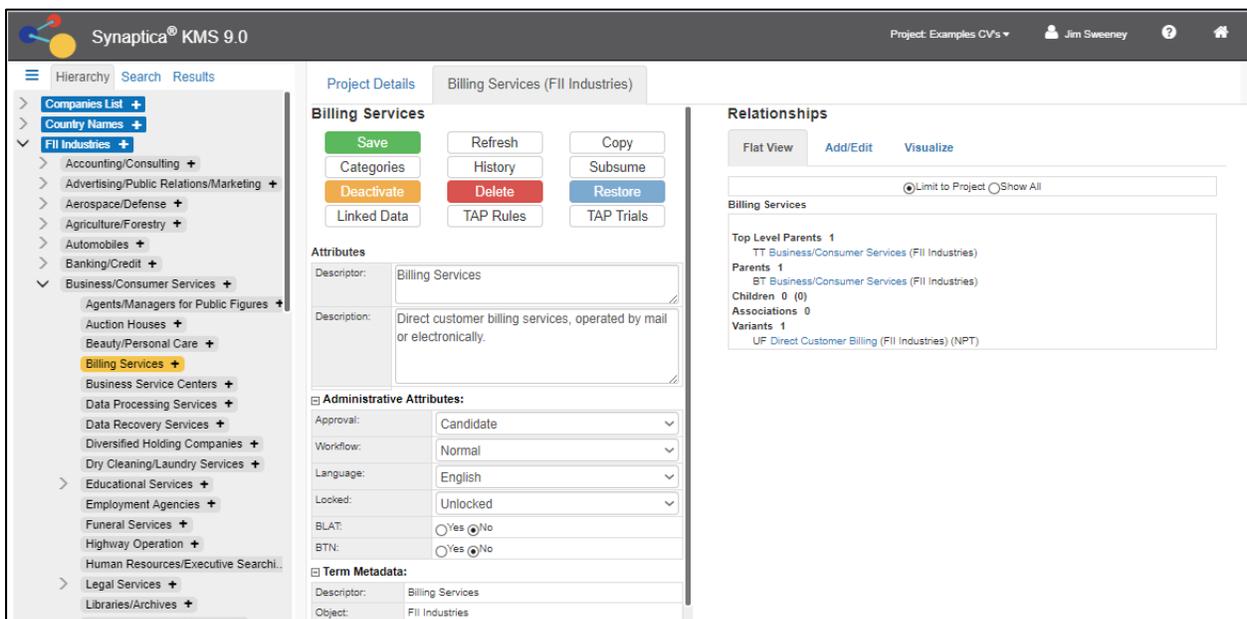
Top Menu Bar

Gone from the top menu of Synaptica KMS are the navigation tabs. The new top bar provides access to select *Projects* (formerly known as Taskviews), logout options, system version/upgrade history, system documentation, and the option to "reset" to the initial display of a selected Project by clicking on the "home" icon to the right or the Synaptica logo and system name to the left.

Navigation and Workspace Panels

The *Navigation Panel* area is a vertical section to the left of the larger *Workspace Panel*. The Navigation area displays hierarchical access to navigate Object Classes (vocabularies), Search,

Search results, as well as providing access to the Tools, Reports, and Administrative menus for the KMS system by clicking on the three-bar menu link to the left of the Hierarchy tab.

The *Workspace* area contains the main content for the Projects and Terms selected in the Navigation Panel which includes items such as: *Term Details* information (formerly labelled as Item Summary), report parameter entry and results, and advanced editorial tools and administrative operations.

The ability to rapidly move between different areas within Synaptica KMS is facilitated with persistent tabs and expanding and collapsing menus.

Project Landing Page

Once a Project is selected, a Project Details tab is displayed and may be expanded to view term and relationships metrics associated with each Object Class in the Project.
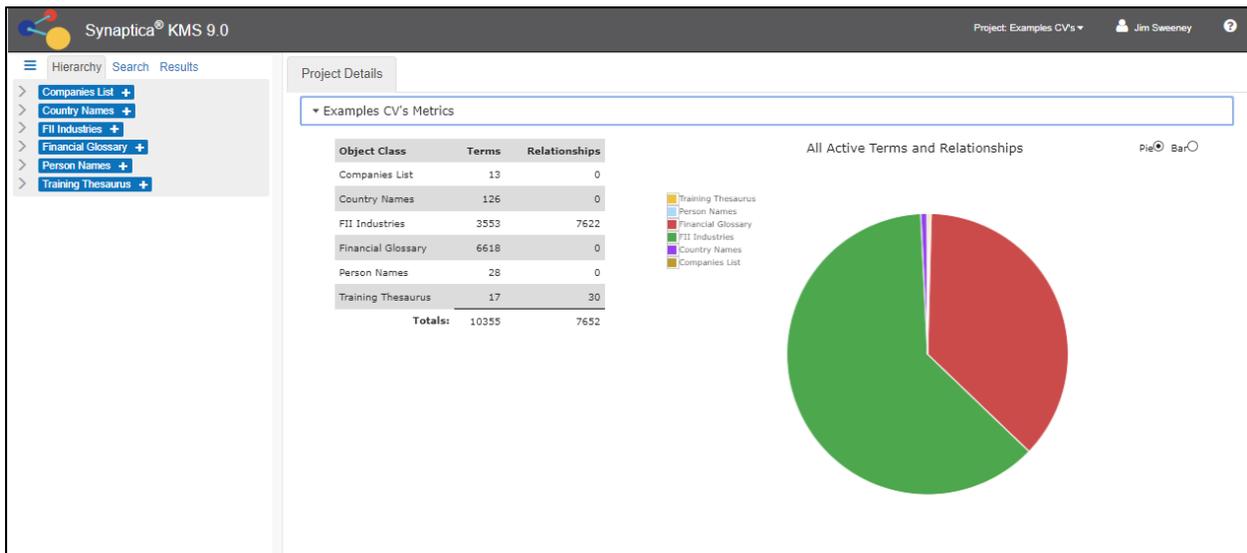
A table displaying term and relationship counts for all active terms for each Object Class is displayed with a pie or bar chart representing the combined number of terms and relationships.

The Bar Chart will be displayed by default if the total number of Object Classes in that Project is great than 12.
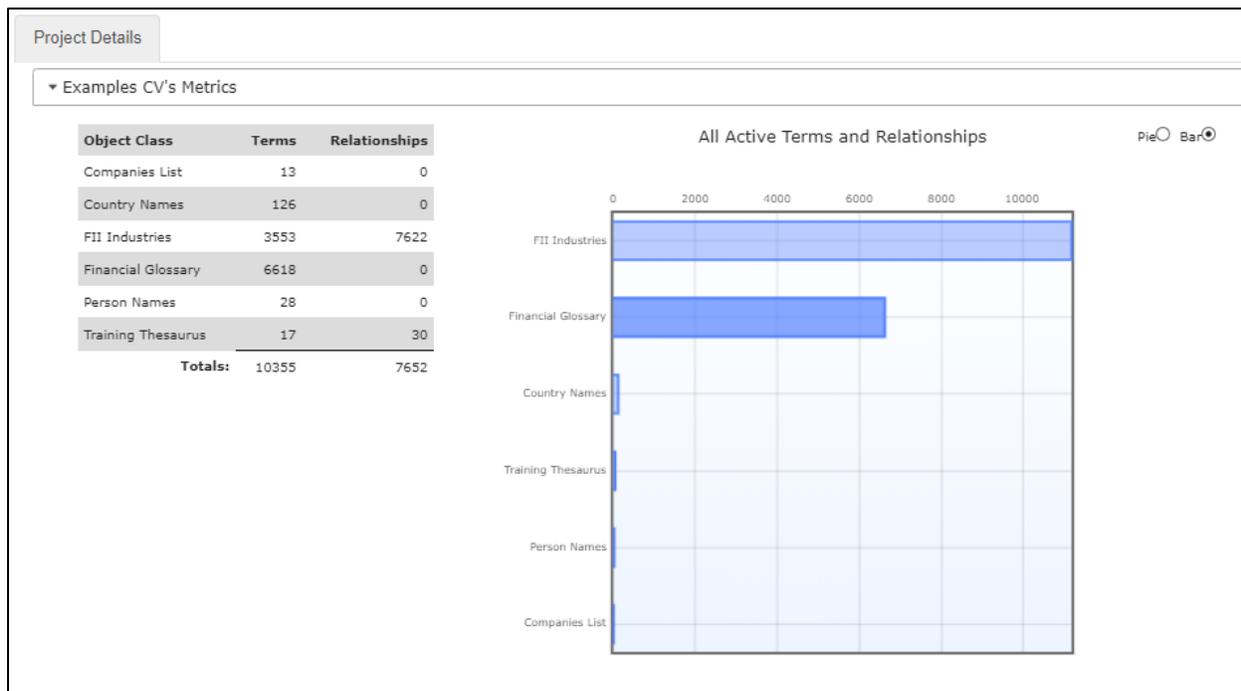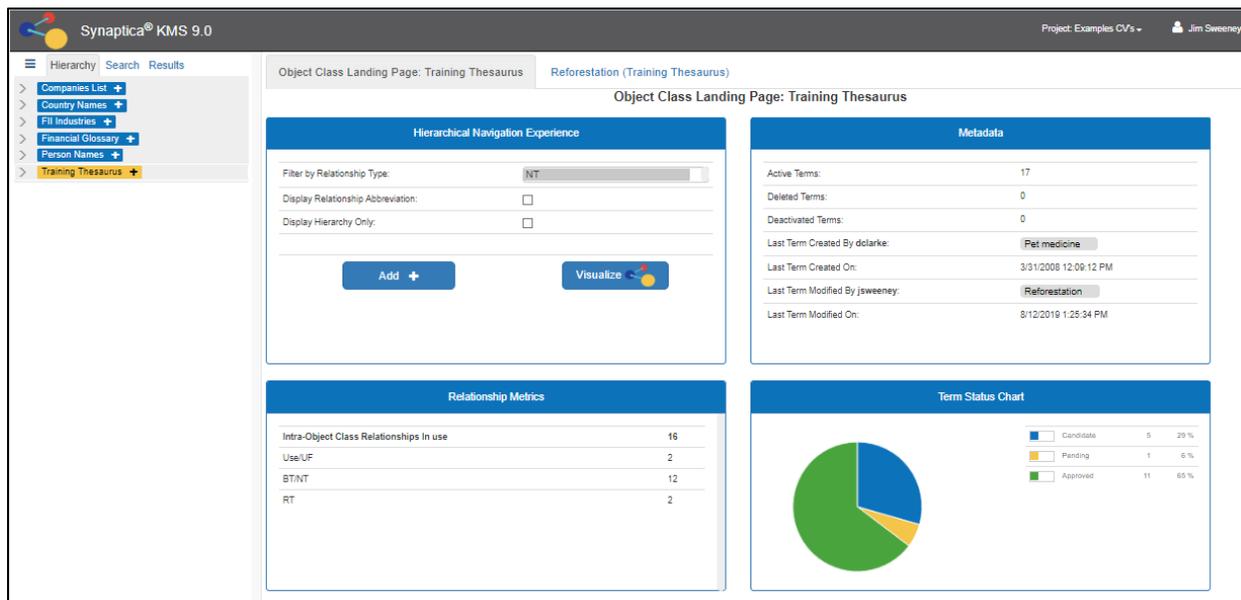
Hierarchy Display

The new, primary means of viewing and navigating vocabularies (Object Classes) is the Hierarchy display in the Navigation panel. After a Project is selected, the entire page refreshes to display a list of all Object Classes for that Project. Each of these may be expanded to view terms contained in different branches and levels of each vocabularies' hierarchical structure. This view effectively replaces the Tree Browse feature from former versions. Speaking of former features, removed is the A-Z Browse tool.

Object Class Landing page

The Object Class Landing Page provides a summary review of Object Class content, and their terms status and relationship information. This area also offers tools that allow filtering for Object Class navigation within the Hierarchy display, as well as Add Term and Object Class Visualization options. (Many of these features were formerly part of the Tree Browse experience.)
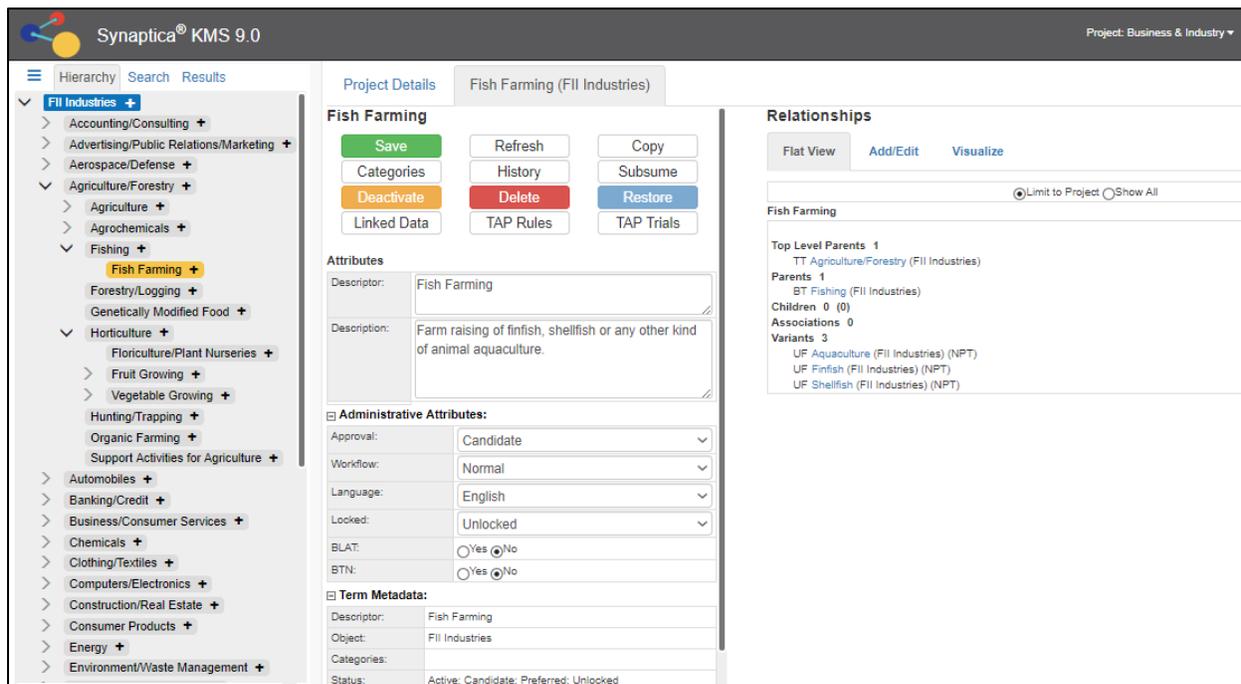
Term Details

Term Details is the new name for what was previously called the Item Summary page and, as found throughout the new design, there are no longer any pop-up windows used in the interface. The basic design remains fundamentally the same with a range of editorial controls as well as access to edit Term *Attributes* (formerly known as Sub-Elements) and *Term Metadata* (formerly known as Administrative Attributes). On the left-hand side of the display, the order of the editorial buttons has been changed, and a splash of color added to some items. The overall ordering of the collapsible sections has also changed with the Term Metadata moving to the bottom of the column.

New to the Flat View relationship display on the right-hand side is a count of all immediately related terms for each relation group. The "Children" section also displays a count in parentheses of all "subordinate" narrower terms, being the full extent of narrower terms that extend beyond the narrower terms being immediately displayed in the Flat View.

Term Adds

Terms may now be added by clicking on any plus sign [+] located next to Object Classes or Terms in the Hierarchy display, from the Object Class Landing Page, and still may be added from individual Term Details pages with the "Add/Edit" link. When accessing the Term Add page from the plus sign next to a term, the option is provided to add a relationship from the term in the hierarchy to the newly added term at the same time the user is adding term details.

Search and Search Results

Term Search is accessed by clicking on the *Search* tab in the Navigation Panel. Results from any search are displayed in the adjacent *Results* tab and the user may alternate between them. Search remains fundamentally unchanged, except for the removal of the A-Z and Range options. There has also been some consolidation in the display to use a single input box for all search options, and some labels have been shortened. Tool tips are available for all search options, including using wildcard values, by "mousing" over that option. Finally, the search button is now persistent at the bottom of the column rather than scrolling with the search parameters.
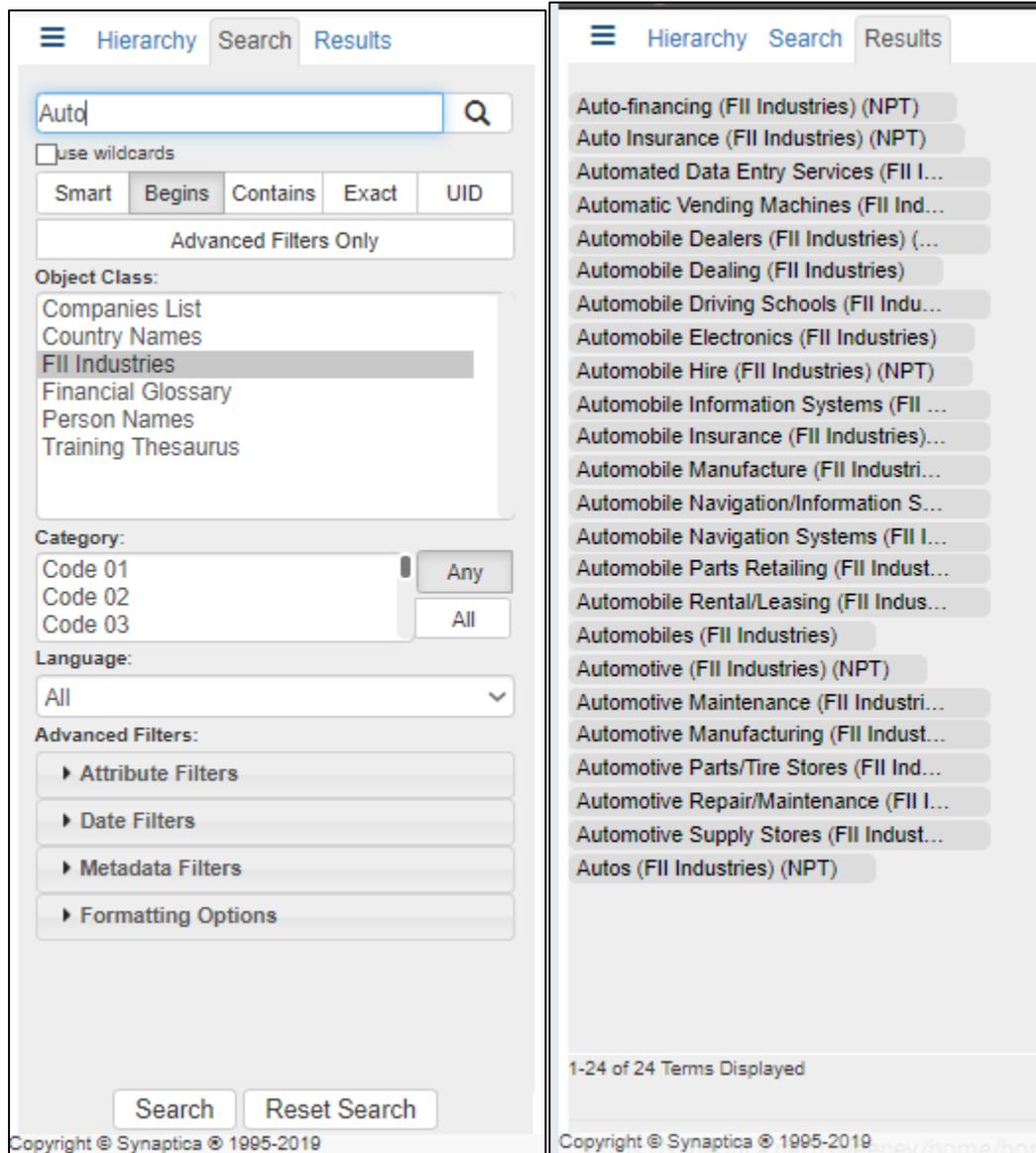
Advanced Editorial Tools

As mentioned above, users will now access the *Tools* and *Reports* menus by clicking on the three-bar icon to the left of the Hierarchy tab in the Navigation Panel. While most functionality remains the same in this new location, there are a few notable changes and additions.

Drag and Drop New Features

Functionality for the Drag and Drop hierarchical editing tool remains much the same but now provides additional search capabilities with a field to enter character strings, words, or a phrase to locate target terms for drag-and-drop editing. This type-ahead feature provides results that can be selected to jump directly to that term. Also available is the option to run the last search performed by clicking on the icon to the right of the search entry field.
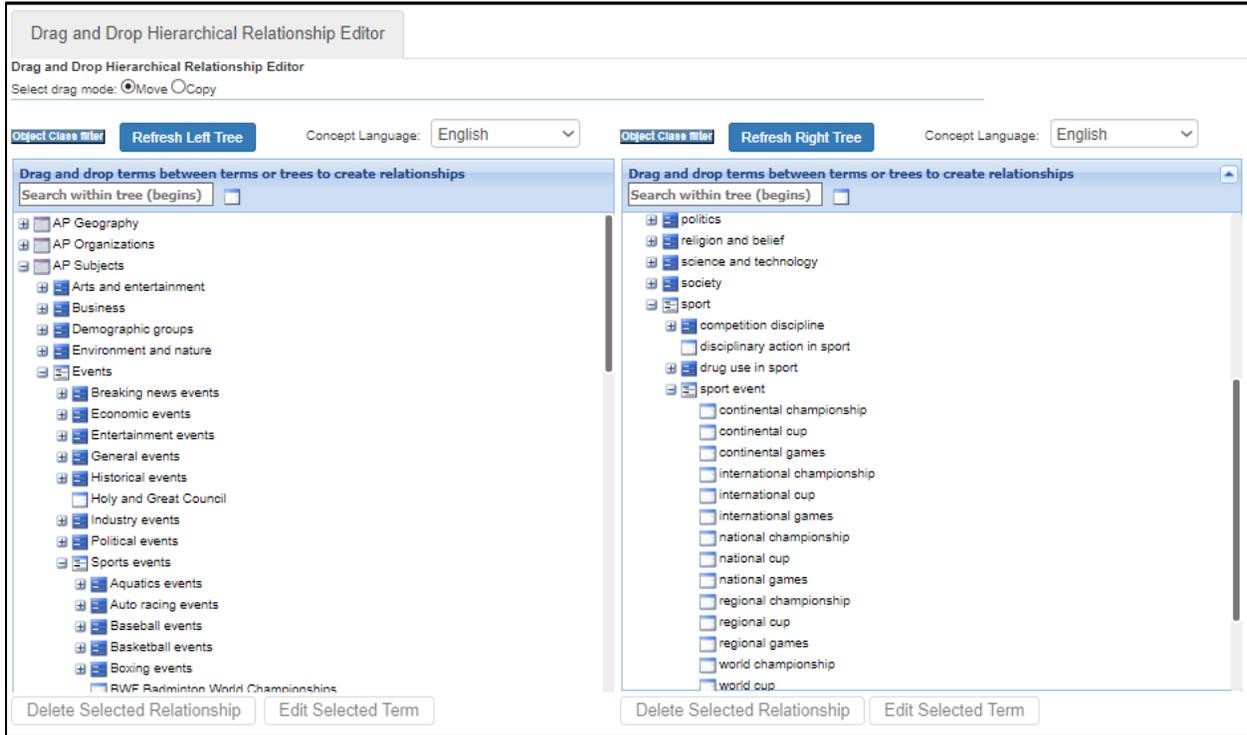
Maintenance Section

A new *Maintenance* section has been added under the Tools menu. The two items located there - "Process Log" and "Review, Download or Delete Temporary Report Files" - were formerly found in the Admin Tools area with access limited to Synaptica Administrator users only. The move of these items to the Tools menu allows access for a standard user to end any of their own processes that might be incorrect or running for too long a time.

In the second section, a user may review, download, and/or delete any temporary report files that remain on the server. Columns on both features are sortable, allowing the user different options to sort the provided information. In fact, sortable columns are now found in several Synaptica KMS tools where detailed data is produced, such as the Import Manager and Monitor.

Additionally, the user can search across the data held is each column using the newly available search field. This search allows for the entry of multiple words, phrases, or even character strings and it will locate results in multiple data fields to provide a highly specific result set. This "multi-item" search field is now available throughout the Synaptica KMS information display pages where data with multiple, searchable columns of information are presented.

Note: *Synaptica Administrators may stop any user's process as well as view and delete all temporary report files.*
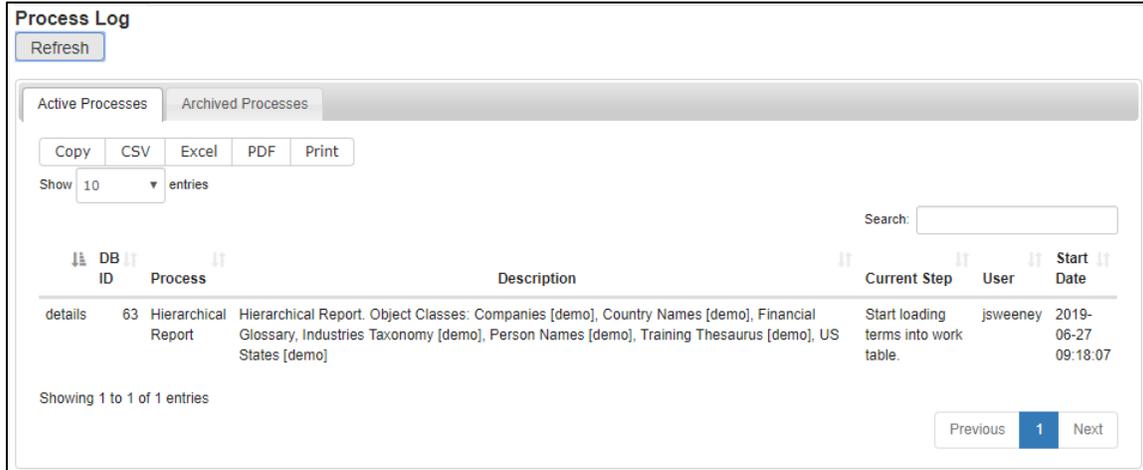
Automated Cleanup of Runaway Processes

The Process Log viewing page has also been enhanced to automatically archive "runaway" processes, or any process that remains open but inactive. An optional configurable system setting can specify the duration of time in days that a process runs before it is considered "runaway". If the setting is not configured processes will not be automatically archived.

When the Process Log viewing page is opened by any user, and the setting is set to active, all processes meeting the "runaway" criteria will be automatically archived and a confirmation request message displayed to alert the user.
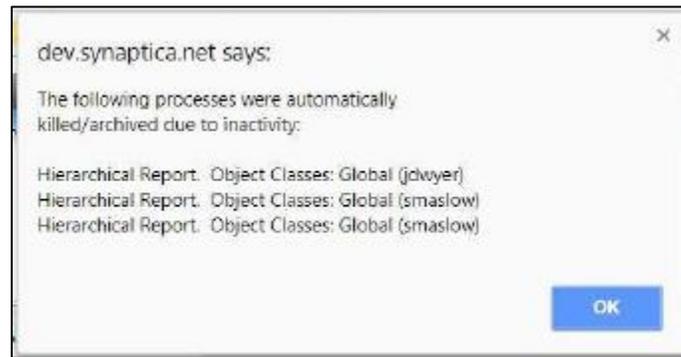
Reports

While most functionality remains the same for the Alphabetical and Hierarchical reports, both are now presented on a single page with collapsible sections, removing the "Continue" button that previously took the user to a second report parameter input page.

Alphabetical Report CSV/TAB/TXT and MS Excel Outputs: *Now with Attributes!*

The option to include Term Attributes in tabular type outputs is available in Synaptica KMS version 9.0. After the user specifies which Attributes to include in the output the same 7 column output is previously provided is produces. However, the "Relationship Type" and "Related Descriptor" columns are repurposed to include the attribute label and the attribute value for each identified attribute. This is shown in the below illustration for any row where the "Related UID" column has no value.

	A	B	C	D	E	F	G
1	Key UID	Key Descriptor	Key Object Class	Relationship Type	Related UID	Related Descriptor	Related Object Class
2	1163631	Afforestation	Training Thesaurus [demo]	Term Name		Afforestation	
3	1163631	Afforestation	Training Thesaurus [demo]	BT	1163630	Forestry	Training Thesaurus [demo]
4	1163629	Agriculture	Training Thesaurus [demo]	Term Name		Agriculture	
5	1163629	Agriculture	Training Thesaurus [demo]	BT	1163628	Applied botany	Training Thesaurus [demo]
6	1163628	Applied botany	Training Thesaurus [demo]	Term Name		Applied botany	
7	1163628	Applied botany	Training Thesaurus [demo]	Scope Note		change scope note	
8	1163628	Applied botany	Training Thesaurus [demo]	History Note		test history note	
9	1163628	Applied botany	Training Thesaurus [demo]	BT	1163627	Botany	Training Thesaurus [demo]
10	1163628	Applied botany	Training Thesaurus [demo]	NT	1163629	Agriculture	Training Thesaurus [demo]
11	1163628	Applied botany	Training Thesaurus [demo]	NT	1163630	Forestry	Training Thesaurus [demo]
12	1163643	Applied zoology	Training Thesaurus [demo]	Term Name		Applied zoology	
13	1163643	Applied zoology	Training Thesaurus [demo]	BT	1163642	Zoology	Training Thesaurus [demo]
14	1163643	Applied zoology	Training Thesaurus [demo]	NT	1163641	Livestock farming	Training Thesaurus [demo]
15	1163643	Applied zoology	Training Thesaurus [demo]	NT	1163638	Veterinary medicine	Training Thesaurus [demo]

Note: *When Attributes are included in CSV, TAB, TXT, or MS Excel output types, the files are not able to be re-imported into Synaptica KMS as a result of the modified structure.*

Hierarchical Report New Pathways Output Option

The Hierarchical report has been enhanced, adding a new *Pathways* output format option. Unlike the current default output produced if "CSV" and "Pathways" are checked in the report for the Hierarchical Report which produces the default display of UIDs preceding all terms, one may now uncheck "Display UIDs at each level" to create an output that only displays the UID for the last, farthest right term on each row.

|	A	B	C	D	E
1	UID	L1_DESC	L2_DESC	L3_DESC	L4_DESC
2	1163627	Botany			
3	1163628	Botany	Applied botany		
4	1163629	Botany	Applied botany	Agriculture	
5	1163630	Botany	Applied botany	Forestry	
6	1163631	Botany	Applied botany	Forestry	Afforestation
7	1163632	Botany	Applied botany	Forestry	Reforestation
8	1163633	Botany	Research Botany		
9	1163634	Exobiology			
10	1163635	Medicine			
11	1163636	Medicine	Dentistry		
12	1163637	Medicine	Family practice		
13	1163638	Medicine	Veterinary medicine		
14	1163642	Zoology			
15	1163643	Zoology	Applied zoology		
16	1163641	Zoology	Applied zoology	Livestock farming	
17	1163638	Zoology	Applied zoology	Veterinary medicine	

Relationship "Last Modified Date" Output

The Alphabetical and Hierarchical Reports are both now able to output the Last Modified Date for relationships. Both reports display a new checkbox named "Display Relationship Modified Date-Time" in the Formatting Options section. The relationship modified date is available for all Output Types.

Administrative Tools:

Finally, while most Administrative functionality also remains the same, a couple of notable features have been added/improved. For example, the same sortable columns and multi-item search fields that have been added to display pages in the Tools section is also available on some Admin information display pages.

New Project Manager Design

The *Project Manager* (formerly Taskview Manager) has undergone a redesign, streamlining the processes of locating and managing both Object Classes and Users associated with a Project. The option to view and deselect already assigned Object Classes is readily accessible, as is the option to view all Object Classes in the system to add them. Each assigned Object Class is also presented as a link to view all users that currently have access to it and their permission level.
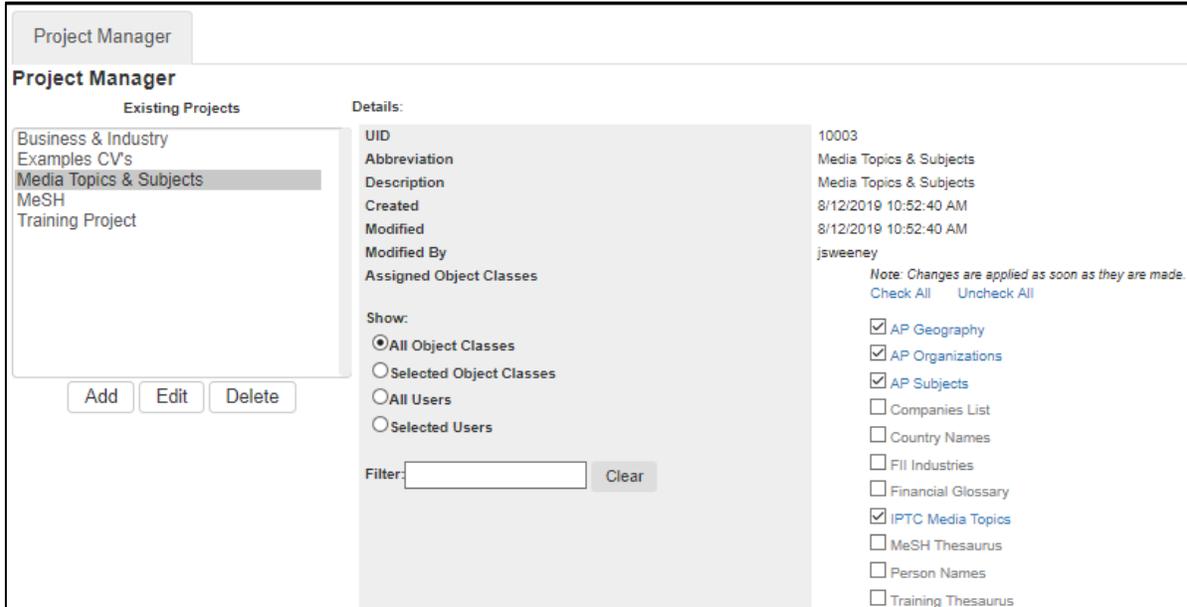
The same management options are available for users, with the added ability to quickly access and edit user permissions by clicking on their username to open a permission management window.