



KNIME Explorer v3.0

User Guide

TABLE OF CONTENTS

Introduction	3
Installation	3
Common Features	3
Adding Repositories.....	3
Mount Points.....	4
Mount Table.....	5
KNIME Explorer View.....	5
Explorer Toolbar.....	6
KNIME Explorer Content.....	7
Context Menu.....	8
Explorer Operations.....	9
Enterprise Features (TeamSpace and Server)	10
Prerequisites.....	10
Installing KNIME TeamSpace Features.....	10
Installing KNIME ServerSpace Features.....	10
Licenses.....	10
Data Files in Remote Repositories.....	11
Dropping files in the Workflow Editor.....	11
TeamSpace URL-Scheme.....	11
Metanode Templates in Remote Repositories.....	12
Using Metanode TemplateS.....	12
Creating a Metanode Template.....	13
Using Quickform Nodes in Metanode Templates.....	13
Server Space Features	14
Teamspace vs Serverspace.....	14
Executing a Workflow on the Server.....	15
Workflow Job Status.....	17
User Access Permissions.....	18
The Owner.....	18

User Groups	18
Server Administrator	18
Workflow Group Permissions	18
Workflow User Permissions	19
Access to workflow jobs and scheduled jobs	19
“Owner”, “Group”, and “Other” Rights	19
Setting/Inspecting Access Permissions	20

KNIME EXPLORER

INTRODUCTION

The KNIME Explorer is a new feature of the open source KNIME Desktop application. It allows you to browse your workflows in the KNIME repositories and to act upon them (for example through the context menu) – just like the old KNIME project navigator. As with the traditional navigator you can look at the workflow projects that are stored in your current workspace but additionally, the new KNIME Explorer allows you to look at multiple workflow repositories at the same time thus enabling you to share workflows and collaborate with colleagues using shared resources.

In the KNIME Explorer you can “mount” the workflow repositories you want to work with. You can mount multiple repositories at the same time allowing you to work on workflows from different repositories simultaneously and to copy or move workflows from one repository to another.

By default only your current workspace is visible (mounted) in the explorer and depending on the product licenses you own, you can add TeamSpace repositories, which contain workflows stored on a local directory in the file system, or ServerSpace repositories, showing workflows stored on a KNIME Server. Depending on the type of the repository the functionality that is available may differ (for example workflows on a server can't be opened and directly modified).

In this guide the new functionality that comes with the KNIME Explorer is shown – it assumes that you are familiar with the traditional way of working with workflows in the KNIME project navigator.

INSTALLATION

The KNIME Explorer view is already part of the KNIME Desktop application and no additional installation steps are required. In order to open this view, select from the “**View**” menu the “**KNIME Explorer**” item. Only one KNIME Explorer view can be open at a time. As of KNIME version 2.7. the Explorer view has replaced the Project Navigator in the default perspective for viewing workflow and data repositories.

COMMON FEATURES

ADDING REPOSITORIES

By default only the LOCAL and the EXAMPLES workspaces are displayed in the Explorer view. The LOCAL workspace shows all workflows and groups of the current workspace like in the traditional KNIME Workflow Projects navigator. The EXAMPLES workspace provides access to the KNIME Public Server with its example workflows.

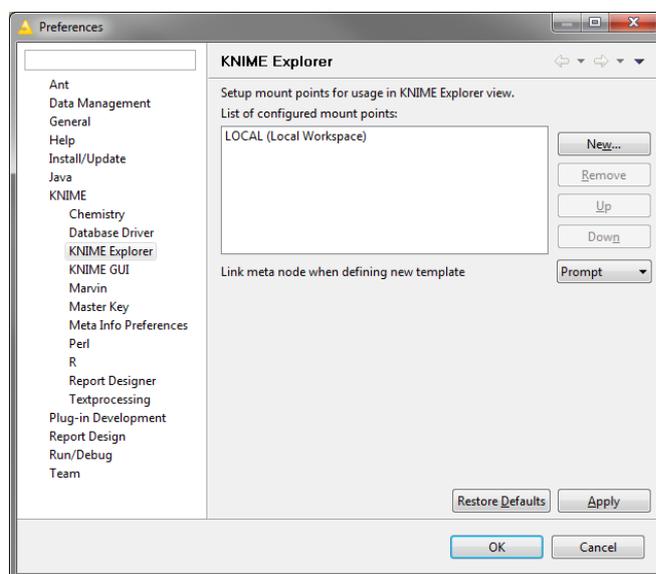
If you want to add a workflow repository to the view, you need to register a new mount point.

MOUNT POINTS

Workflow repositories that should be accessible from KNIME are called mount points. Mount points can be displayed in the KNIME Explorer view.

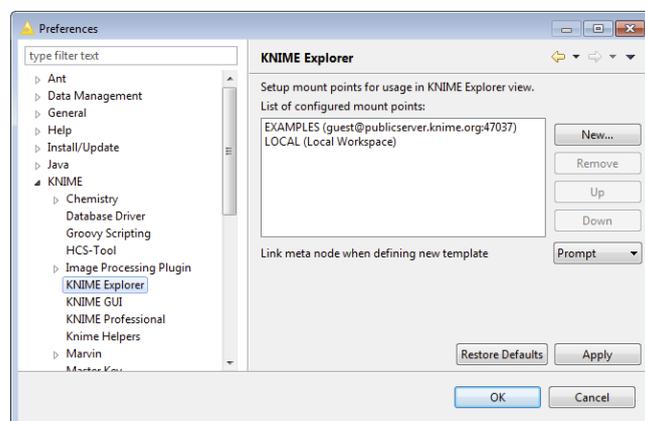
Each mount point consists of the **location** of the workflow repository (that is either the path to the directory or the address of the server) and a **“Mount ID”**.

New mount points are defined in a preference page: From the “File” menu, select “Preferences”, then select “KNIME Explorer” in the category “KNIME”.

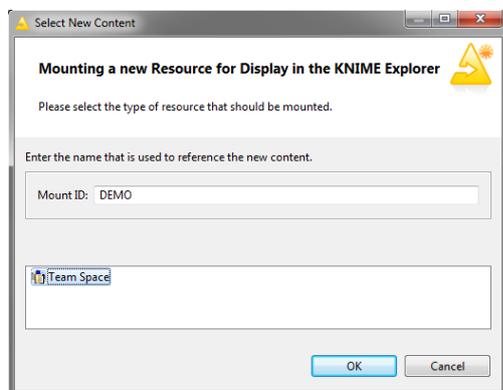


The KNIME Explorer preference page shows all currently defined mount points. The LOCAL workspace is included by default (which is the place where the KNIME base version stores the workflows).

To link a new shared directory to the Team Space, click “New...”.



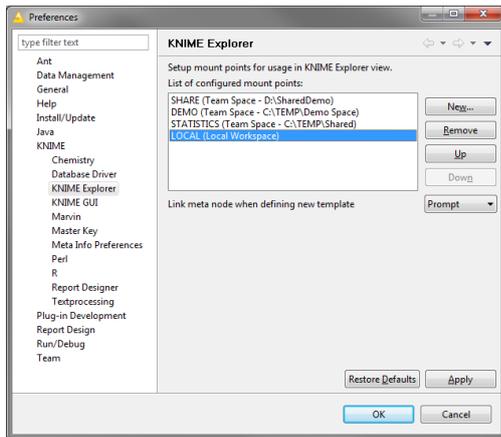
In the dialog that opens, enter a mount ID and click OK to select the directory that should be mounted.



The mount ID may only contain characters, numbers, dashes and dots. It is used to reference files or workflows located under the new mount point.

Especially if workflows are shared and files are accessed throughout different mount points, it is important to associate the correct shared directory with the mount ID. If nodes in a workflow use an URL with the “knime” protocol to read from the shared space (see section below), it will always reference the same file, as long as the same shared directory is mounted. If a mount point is removed while a

workflow node reads from a file stored in the mount point, the reading will fail. If a different shared directory is mounted with the same mount ID, all URL references will try to access the file in this different directory. If it doesn't exist, the operation fails.



After you have added all mount points needed, you can put them in order by selecting one and clicking “Up” or “Down” to move it up or down in the list. The mount points are displayed in this order in the KNIME Explorer view.

Important:

When sharing Metanodes within a common mount point, all KNIME instances connected to this mount point need to use the same mount point ID.

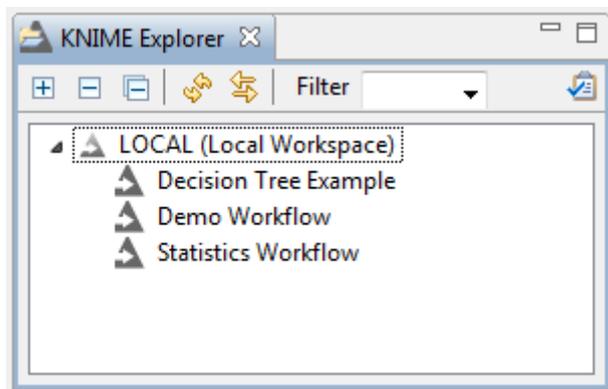
MOUNT TABLE

The list of all defined mount points – that is the list of mount IDs with their associated shared directories – form the “mount table”. It is defined in the preference page (see above) and is saved automatically when KNIME is closed. When you export the preferences (menu “File” -> “Export Preferences...”), this table is exported with all other settings and if the preferences are imported into another KNIME workspace, the mount table is effectively transferred.

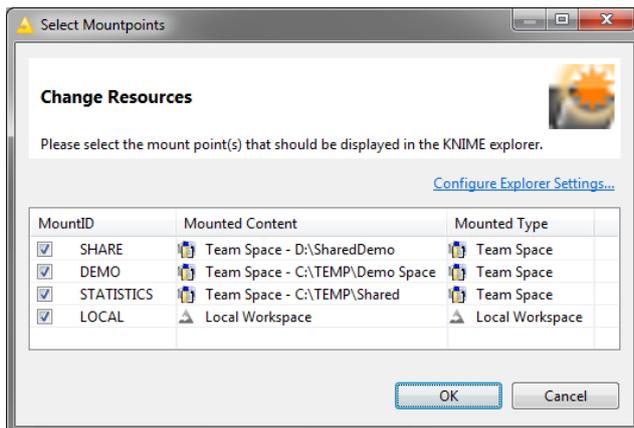
If nodes in the workflow reference data files (or Metanodes) in a mounted repository, the references are resolved against the mount table (see section below). This resolution is done by mount ID, so it is important to note that only IDs which are defined in the mount table can be resolved: if the mount ID is changed or lost in the mount table, a “file not found” error will appear.

KNIME EXPLORER VIEW

You can open the KNIME Explorer view, click the “View” menu and select “KNIME Explorer”. The Explorer opens and shows the registered KNIME work locations. Alternatively, you can select “View > Reset Perspective” to restore the default KNIME view which as of KNIME Desktop 2.6 and displays the Explorer by default.



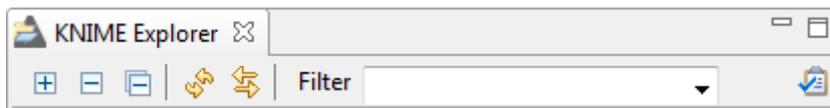
In order to add more content to the view, click the “configuration” icon(). The selection dialog opens, showing all currently defined mount points:



From the Select Mountpoints window you can choose which shared repositories that you want to see in your Explorer view. Clicking “Configure Explorer Settings” you will be taken KNIME Preferences page mentioned in the previous section where you can add additional mount points.

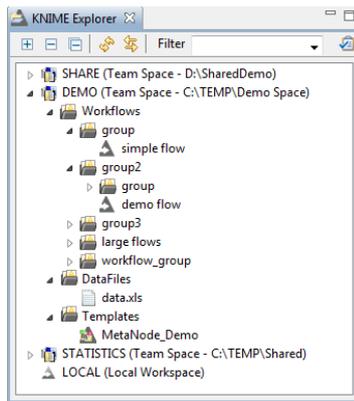
EXPLORER TOOLBAR

At the top of the view are several GUI elements arranged in a toolbar:



	The (+) expands the selected element showing its content, while (-) collapses the element, hiding its children. The  collapses all elements in the view showing only the top level elements.
	Refreshes the view, in case it is out-of-sync with the underlying file system.
	If a workflow located in the Team Space is shown in an editor, this workflow is selected in the Team Space view.
Filter	If you add text to the field and press Enter, the Explorer will filter to items that contain the text in their name or are in a group containing the text in its name.
	Opens the configuration dialog, allowing you to select the content displayed in the view or to add/remove mount points (as seen above).

 KNIME EXPLORER CONTENT



In addition to the repository entries we have discovered so far, there are four additional types of content that can be seen in the KNIME Repository. These are described in the table below:

	Workflow	A group of documents which describe a data manipulation process.
	Workflow Group	A folder within the Explorer which can be used to store workflows, data files and metanode templates.
	Data File	Only data files with known extensions are shown. Data files can be dragged to a workflow editor or a workflow group. File reader nodes can read data files stored in the TeamSpace (see section below).
	Metanode Templates	Metanodes containing a pre-configured workflow fragment can be added to both TeamSpace and ServerSpace. Once added to a workflow, they can be easily updated if the original Metanode in the repository changes.

 CONTEXT MENU

If you right-click in the view or on an item of the view, the following menu is shown. Several menu items are disabled, depending on whether they are applicable to the selected item or not.

 New KNIME Workflow...	Creates a new and empty workflow, places it in the selected workflow group (or directory) and opens it in a workflow editor.
 New Workflow Group...	Creates a workflow group.
 Import KNIME Workflow...	Opens the Workflow import or export wizard.
 Export KNIME Workflow...	
 Delete...	Deletes or renames the selected item. If a workflow is currently edited by a user, or a workflow group contains a open workflow, it is locked and can't be renamed nor deleted.
 Rename...	
 Configure...	Opens the configuration dialog on the selected workflow or executes the entire workflow. Only enabled on workflows opened in an editor.
 Execute...	
 Cancel execution	Opens the corresponding dialog allowing you to define workflow variables or credentials on the selected workflow.
 Reset	
Workflow Credentials...	Opens the Meta Information editor allowing entering information and a description associated with the selected workflow or workflow group.
Workflow Variables...	
 Edit Meta Information...	Copies the URL or Local Path of the selected item to the clipboard, i.e. for direct access to this source via system explorer or a terminal.
 Refresh	
URL Copy URL	
PATH Copy Local Path	
 Cut	Ctrl+X
 Copy	Ctrl+C
 Paste	Ctrl+V

EXPLORER OPERATIONS

Move	To move an item, simply drag it and drop it on the desired new location. You can move within the same mount point or move items between different shared resources. Additionally, Ctrl-c and Ctrl-v can be use to copy workflows between repositories.
Copy	Copying an item is the same process than moving it – just keep the “Ctrl”-key pressed during the drag & drop step. A little plus-sign next to the mouse cursor indicates the copy operation. The same restrictions with respect to what can be copied where apply.
Node Creation	If a data file of a supported type is dropped into the workflow editor, KNIME will add the data file to your workflow using the appropriate file reading node.
Metanode Template creation	You can save a Metanode Template to your Teamspace or ServerSpace repositories for later re-use. To do this, simply right-click on any Metanode and select “Save as Metanode Template...”. The resulting dialog will let you choose a destination for your new Template. (More details can be found in the corresponding section below.)
Metanode Template usage	To use a Metanode stored in the TeamSpace, drag&drop it in the workflow editor. A linked Metanode is added to the workbench. This instance is updated either manually through the context menu or when the workflow is loaded. The Metanode can also be unlinked from the TeamSpace which makes it editable in the workflow directly.

ENTERPRISE FEATURES (TEAMSPACE AND SERVER)

KNIME Teamspace and KNIME ServerSpace are commercial features of the KNIME product family. KNIME Teamspace facilitates the use of KNIME Desktop in small groups by allowing you to share your workflows and data files easily between KNIME desktop applications using shared repositories that may contain workflows, data files and meta-nodes. KNIME ServerSpace has some additional features. Specifically, in addition to having access to a shared repository, the ServerSpace enables server-side execution of workflows, user access permissions and the ability to run workflows via the KNIME Webportal.

PREREQUISITES

The KNIME TeamSpace V3.0 and KNIME ServerSpace V3.6 requires a KNIME Desktop V2.5.4 or higher.

INSTALLING KNIME TEAMSPACE FEATURES

Start KNIME as the user that owns the installation directory. From the “Help” menu, select “Install New Software...”. Click “Add...” and “Archive...” in the following dialog. Browse to the Team Space update site archive from the KNIME Team Space distribution. Select the KNIME.com TeamSpace Extensions (including the KNIME TeamSpace and KNIME Report Batch Execution), click “Next”, accept the license and finish the installation. The new feature will only be available after a restart of KNIME.

INSTALLING KNIME SERVERSPACE FEATURES

Start KNIME as the user that owns the installation directory. From the “Help” menu, select “Install New Software...”. Click “Add...” and “Archive...” in the following dialog. Browse to the KNIME.com ServerSpace update site. Select the KNIME.com Client Side Extensions and click “Next”, verify the licensing terms and finish the installation. The new feature will only be available after a restart of KNIME.

LICENSES

The TeamSpace only works with a valid license file. Create a directory named “licenses” in your KNIME installation directory, if it doesn’t exist already. Copy your license file from the KNIME Team Space distribution to this directory. Finally, restart KNIME in order to activate your license.

If you don’t have a license file, or it is not working correctly, please contact KNIME by sending an email to contact@knime.com or to your dedicated KNIME support specialist. You can check your license using the KNIME License view available in the menu View > Other... > KNIME Views.

If you get the error message “No license found.”, please check the name of the license directory, it must be named “licenses”, and be located in the KNIME installation directory. Finally, the license file must end with “.xml” and have read permissions for the user running KNIME.

Licensing for the KNIME ServerSpace is controlled on the server itself. If you do not know your username and password, please contact your local KNIME system administrator.

DATA FILES IN REMOTE REPOSITORIES

Files can be stored in workflow groups together with workflows in both KNIME TeamSpace and KNIME ServerSpace repositories. Add a file to a remote repository using by dragging it from a file explorer window (the “Windows Explorer” in Windows) to the desired group within the repository. Only files with registered extension are accepted by the KNIME Explorer.

You can also copy a file with the operating system to the mounted shared directory. After you click refresh  in the TeamSpace explorer, the file is displayed. Note again that as above, only files with a registered extension are visible.

DROPPING FILES IN THE WORKFLOW EDITOR

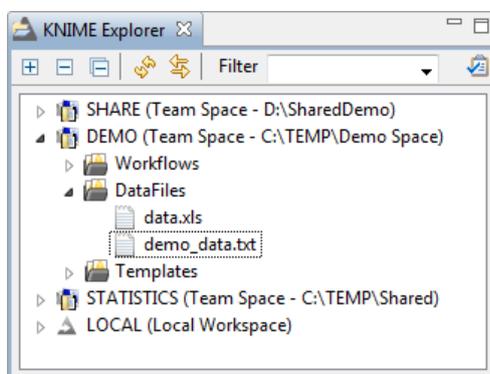
Files stored in a remote repository can be dragged to an open workflow editor. The node that is associated with the file’s extension is instantiated and configured to read from the dropped file. If the node is not executable – that is, it needs more settings in its dialog – the configuration dialog will be opened. Registered file extensions and their associated reader nodes are fixed and cannot be adjusted by the user.

TEAMSPACE URL-SCHEME

References to files located in a remote repository use a URL. Both TeamSpace and ServerSpace features define a new URL scheme (“knime”), which denotes a resolution to the KNIME Explorer. If you use the “knime” URL scheme, it must refer to the same mount point regardless of the operating system or the mounted content. When a data file is dropped into a KNIME workflow, the instantiated Reader is automatically configured to read from the knime-URL.

The general syntax of a URL referencing a data files in a KNIME repository is:

knime://<mount-ID>/<path in repository>/<filename>



The scheme (the first element in the URL) must always be “knime:”. After the first slash, specify the mount ID of the content you want to read from. Subsequently, the path to the file in the repository including the filename is used to locate the file of interest.

As long as you and your colleagues are using the same mount ID for your shared repository, you will be able to easily reference share a single repository and workflows that are moved from system to system will always be able to see the original data, enabling seamless data sharing that is truly independent of the operating system KNIME is running on and makes it easier to share workflows among different users and different computers.

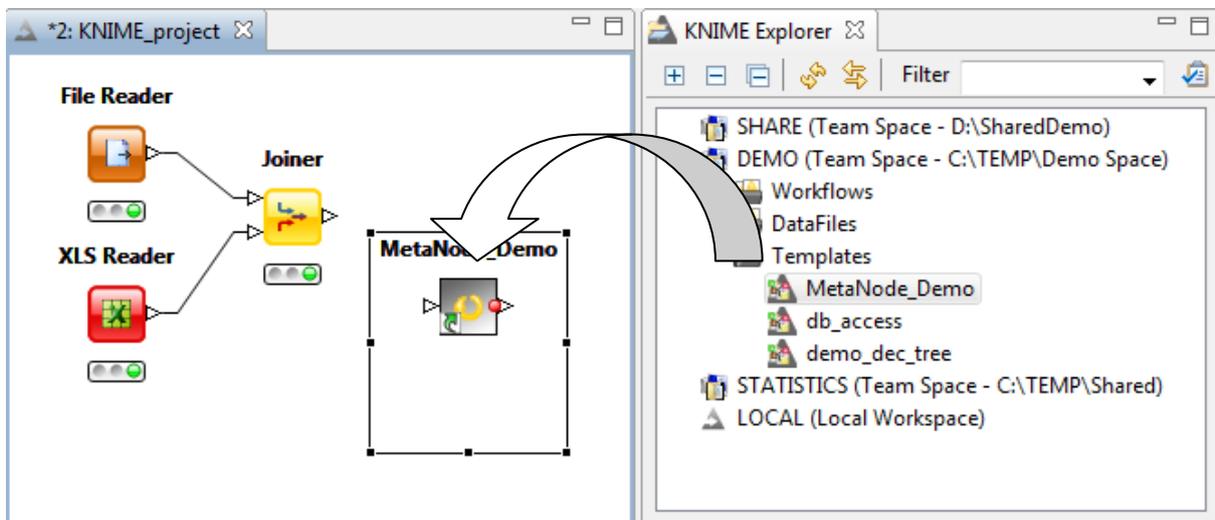
METANODE TEMPLATES IN REMOTE REPOSITORIES

TeamSpace and ServerSpace repositories can be used to store reusable Metanodes. Metanodes stored in a remote repository allow complicated subroutines in KNIME to be shared among your colleagues. This enables increased productivity through a reduced duplication of efforts and by allowing fixes and improvements to these subroutines to be pushed out to all users of a particular Metanode.

Metanodes stored in workflow groups in the TeamSpace. They are displayed with this icon: 

USING METANODE TEMPLATES

To use a Metanode from your remote repository, simply drag it to the workflow editor, which will then insert a linked metanode reference. The advantage of a linked reference is that it can be used to update your working copy of the node should the original be changed. A Metanode linked to a shared repository is read-only, but can be unlinked from its metanode template via the metanode context menu command: “Disconnect Meta Node Link”.

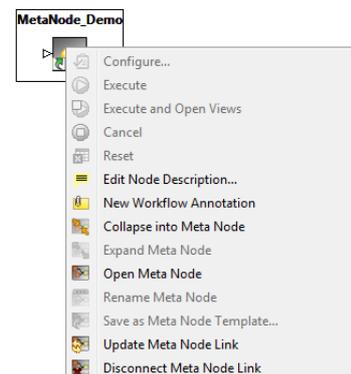


Metanodes in a workflow with an arrow in the lower left corner of the node icon  are „linked“ Metanodes.

LINKED METANODES

Linked metanodes are read-only instantiations of a metanode template. If you open the editor for this new metanode copy (by double-clicking it for example), the editor has a gray background, indicating that it is indeed read-only: you may open the configuration dialogs on the nodes and inspect the settings but you may not apply changes to configuration dialogs or adjust node inputs or outputs.

If you open the context menu on a metanode and select “Update Meta Node Link”, KNIME will check if the original metanode template has changed since the copy in the workflow was last updated. If an update is available, you may choose to overwrite your local copy. If you choose to not update, the link icon in the node will change from green to red. The red arrow serves as a reminder that the template has changed and that the metanode is currently not in sync with those changes.



WORKFLOW LOADING WITH LINKED METANODES

Upon loading a workflow containing one or more linked Metanodes, KNIME will ask if you would like to check for newer versions of your linked Metanodes. Choosing yes will allow you to see which nodes have available updates and give you the opportunity to implement those updates in your current workflow. Choosing No will simply flag all of your nodes as potentially outdated and allow you to proceed with your analysis normally. You will subsequently need to manually update your Metanode links when this becomes convenient.

DISCONNECTING LINKED METANODES

Should you need to edit your linked metanode you will first need to disconnect it from its linked template. From the context menu of the node select “Disconnect Meta Node Link”. The little link arrow in the node’s icon will disappear.

You can now edit the metanode and save changes. It is a regular metanode now. You cannot automatically check for new versions of the original template anymore. You can in turn use this modified metanode to create a new metanode template or override an existing one, see section below.

CREATING A METANODE TEMPLATE

Any metanode in a workflow can become a metanode template when it is stored in the TeamSpace.

Be careful to create the subflow contained in the metanode in a way so that it will work in other workflows and in other KNIME environments. For example, try to avoid hard coded paths to files or directories. Instead, use URLs that reference files in the remote repository using the scheme identified in the previous section. All nodes should be pre-configured to run with the expected data input this step is very important because linked metanodes are read-only for their users.

In streamline the adoption of your metanodes, consider adding detailed custom node descriptions. From the context menu select: “Edit Node Description...”. Your node description should contain information regarding the purpose of your node, the configuration options that you have exposed (see next section), and details regarding expected inputs and outputs. You may also change the name of the node. This is what users see, when they connect to the TeamSpace. Note that it is not advised to use non-standard characters: stick with numbers, spaces and underscores in order to avoid problems.

Finally, you may right-click on your Metanode and select “Save as Metanode Template...”. The resulting dialog will prompt you to choose a location where to save the Metanode template. After creating the template in the Team Space another dialog opens. You can now add a link from the Metanode in your workflow to the newly created template in the Team Space. This way you can update your local copy of the Metanode whenever the template in the TeamSpace is updated.

USING QUICKFORM NODES IN METANODE TEMPLATES

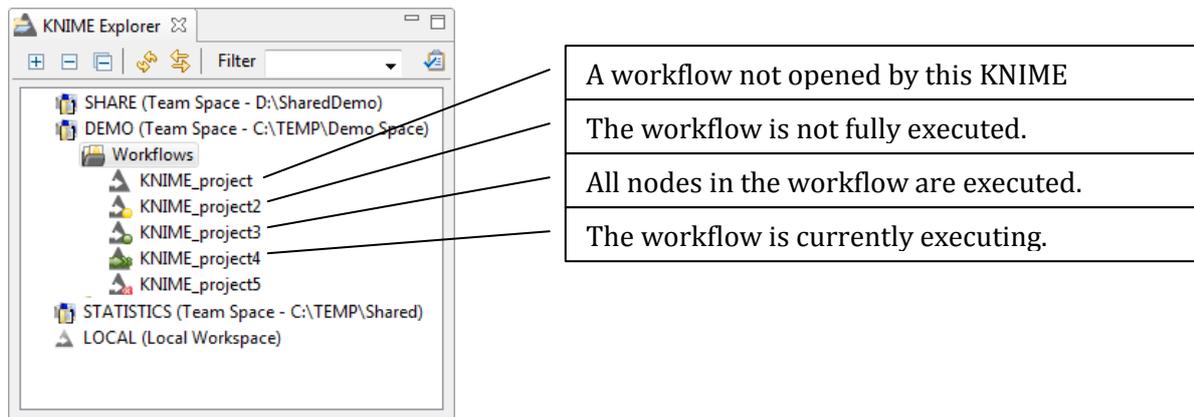
Linked Metanodes are read-only instances spawned from a template in a remote repository. They cannot be changed or configured by the end user. However, in order to provide some degree of flexibility in Metanode templates it is possible to parameterize them using QuickForm nodes. When the template contains QuickForm nodes the metanode will construct a configuration dialog based off of the defined these nodes. For more information on this topic, please refer to the KNIME WebPortal documentation.

SERVER SPACE FEATURES

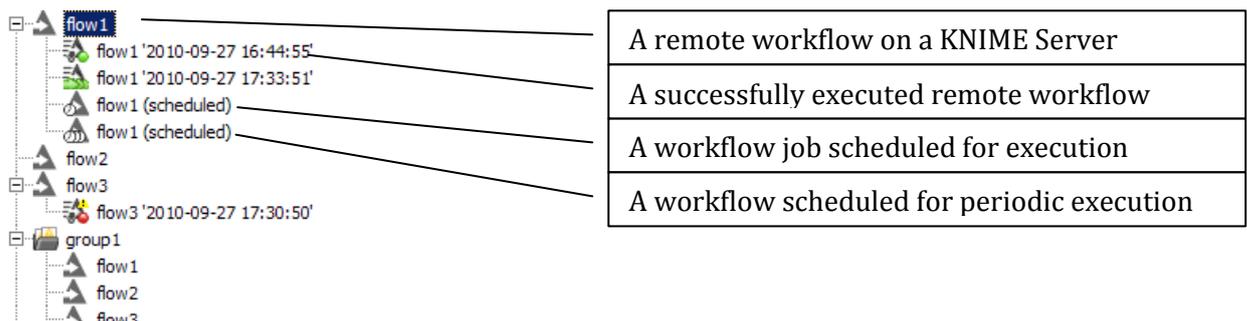
TEAMSPACE VS SERVERSPACE

The behavior of workflows in the different types of remote repositories (KNIME TeamSpace and KNIME ServerSpace) will be briefly outlined here.

In a nutshell, Teamspace provides a shared resource where workflows may be executed locally:



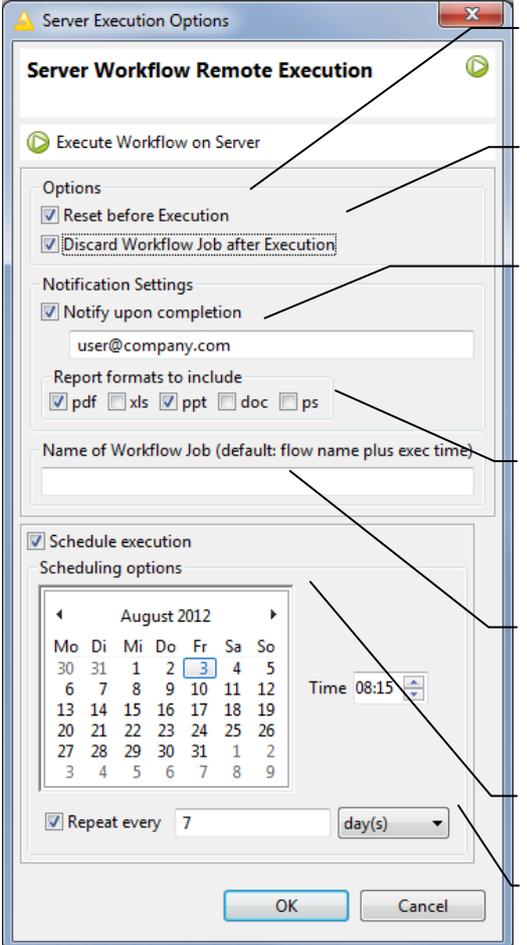
A serverspace enables user access permissions, server-side execution, and scheduling for more complex environments:



If a workflow is opened by one user, it is locked for all other users; actually it is locked for all other KNIME instances, i.e. the same user can't open it with another KNIME instance either. The workflow cannot be opened or modified by any other user while it is in use by one user. Also the workflow groups that contain it cannot be modified, i.e. not renamed or deleted nor moved or copied.

EXECUTING A WORKFLOW ON THE SERVER

If “Execute...” is selected from the context menu of a workflow, the following dialog appears:

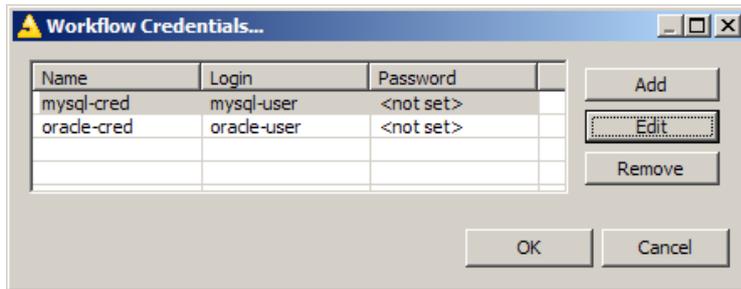
	<p>If checked, the workflow is reset before it is executed. All nodes are reset (also File Reader and Database Reader nodes, etc.).</p>																																																	
<p><input checked="" type="checkbox"/> Discard Workflow Job after Execution</p>	<p>If selected, the executed workflow instance (“Workflow Job”) is deleted after successful execution, without saving it.</p>																																																	
<p>Notification Settings</p> <p><input checked="" type="checkbox"/> Notify upon completion</p> <p>user@company.com</p> <p>Report formats to include</p> <p><input checked="" type="checkbox"/> pdf <input type="checkbox"/> xls <input checked="" type="checkbox"/> ppt <input type="checkbox"/> doc <input type="checkbox"/> ps</p>	<p>Email notification settings: enter one or multiple email addresses to which a notification is sent after the workflow execution has been finished; this is independent from the state of the workflow.</p>																																																	
<p>Name of Workflow Job (default: flow name plus exec time)</p>	<p>If the workflow has a report attached, the Server Workflow Remote Execution window shows the different report output formats including PDF, XLS, PPT, DOC, and PS.</p>																																																	
<p><input checked="" type="checkbox"/> Schedule execution</p> <p>Scheduling options</p> <table border="1" data-bbox="231 974 478 1176"> <thead> <tr> <th>Mo</th> <th>Di</th> <th>Mi</th> <th>Do</th> <th>Fr</th> <th>Sa</th> <th>So</th> </tr> </thead> <tbody> <tr> <td>30</td> <td>31</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> <td>5</td> </tr> <tr> <td>6</td> <td>7</td> <td>8</td> <td>9</td> <td>10</td> <td>11</td> <td>12</td> </tr> <tr> <td>13</td> <td>14</td> <td>15</td> <td>16</td> <td>17</td> <td>18</td> <td>19</td> </tr> <tr> <td>20</td> <td>21</td> <td>22</td> <td>23</td> <td>24</td> <td>25</td> <td>26</td> </tr> <tr> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td>31</td> <td>1</td> <td>2</td> </tr> <tr> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> </tr> </tbody> </table> <p>Time 08:15</p>	Mo	Di	Mi	Do	Fr	Sa	So	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	<p>The name of the workflow job as it is displayed in the server view. If the default is accepted, the execution date and time is appended.</p>
Mo	Di	Mi	Do	Fr	Sa	So																																												
30	31	1	2	3	4	5																																												
6	7	8	9	10	11	12																																												
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<p><input checked="" type="checkbox"/> Repeat every 7 day(s)</p>	<p>If selected, the flow is not executed immediately but at the date and time set.</p>																																																	
<p>OK Cancel</p>	<p>If “Repeat” is selected enter the time between the subsequent executions of the flow.</p>																																																	

If you click OK, the workflow is loaded into the KNIME executor on the server.

It is possible to schedule the workflow for delayed and even periodic execution. If “Schedule Execution” is checked additional scheduling options appear that allow you to set a date and time when the workflow should be executed. To enable periodic execution, check the “Repeat” box and enter an interval to be used between subsequent executions.

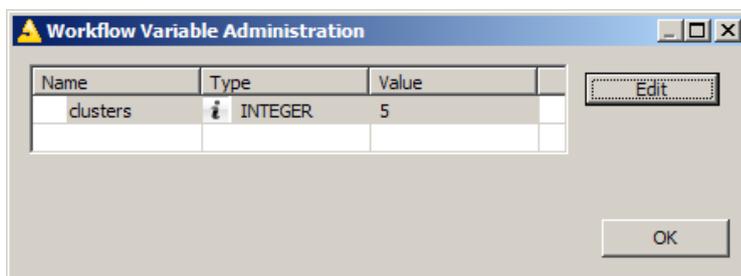
Scheduled jobs are children of their corresponding workflow in the server's repository. While non-repeating scheduled jobs are automatically removed from the time table after their execution, repeating jobs exist until they are deleted by the user.

If the flow contains nodes that require credentials (user name and password) for them to log in to another system (for example Database Nodes), these credentials are usually stored as workflow credentials and the following dialog allows entering the credentials for this run:



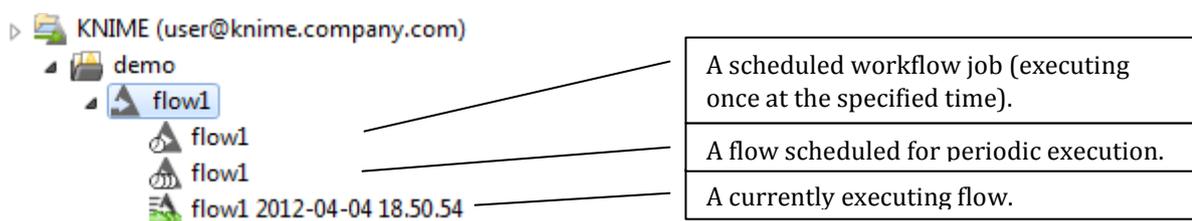
Select the credentials you want to change and click “Edit” to enter username and password.

If the workflow contains flow variables, a dialog shows, allowing you to enter new values for these variables:



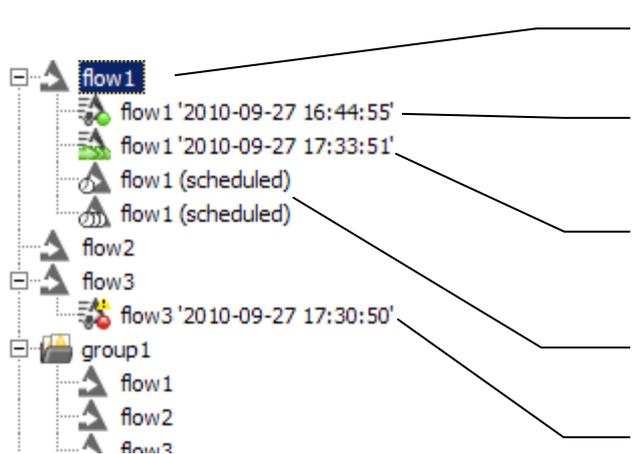
Select the variable you want to change, click “Edit” and enter the new value. After you click OK in this dialog, the execution starts.

Executing workflows are displayed as “Workflow Jobs” in the server view. They show as children of their workflow with a decorator indicating their status. A flow can be executed simultaneously multiple times, creating multiple workflow jobs.



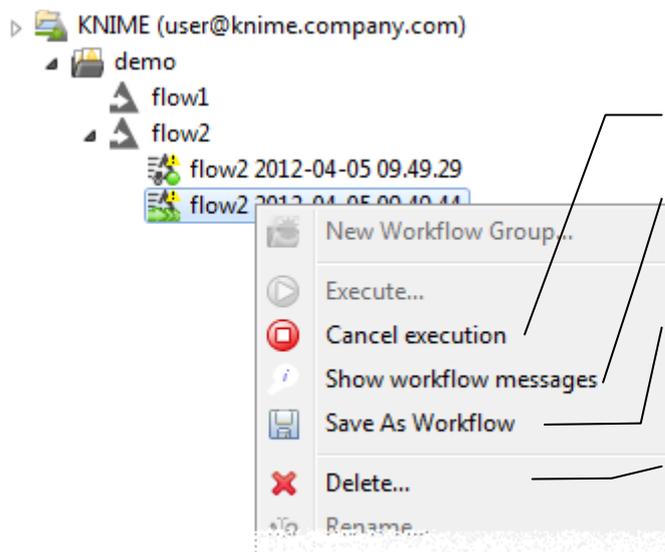
Please note, with multiple KNIME instances for flow execution, one of the limited number of KNIME instances is blocked as long as the job stays in memory. Consider checking “discard after execute” (especially with repeating scheduled jobs) in order to remove jobs that successfully executed and to free a KNIME resource.

 WORKFLOW JOB STATUS



Workflow jobs are children of their corresponding workflow in the server's repository.
A successfully executed job: all nodes are executed. The flow stays in memory until it is removed manually through the context menu.
This job is currently executing in the KNIME executor on the server. The date and time it started is added to its (default) name.
Scheduled jobs (scheduled for single and periodic execution).
This workflow job finished unsuccessfully. An error occurred. The yellow warning icon indicates node messages. They can be looked at through the context menu.

Workflow Jobs stay in the main memory of the server after execution (unless you checked “discard after execution”) until you remove them manually. Right-click on the icon of the workflow job to open the context-menu:



Cancel execution	Cancels workflow job execution (only available if the job is still executing).
Show workflow messages	Shows the messages that occurred in the workflow. Only available if a yellow warning icon shows at the workflow job.
Save As Workflow	Saves the workflow job as workflow in the server's repository. (Only available if you have “read”/”download” access to the original workflow.)
Delete...	Deletes the workflow job from the memory of the server (this does not affect the workflow in the server's repository this job was generated from). All data is lost, if the flow was not saved before.

The result of the workflow job can currently only be inspected by saving it as workflow in the repository – this can also be achieved by dragging & dropping it into a different location inside the server repository - and then downloading that flow to your local workspace and opening it there. Currently it is not possible to download the workflow job directly.

If the server is not configured to run multiple KNIME executor instances (see section above), a flow is executed on the server under the same user Glassfish was started with. If it writes to a file, this user must have write permissions at the destination location. If the flow submits jobs into a cluster (separate KNIME Cluster Execution plug-in) they are submitted by this user.

USER ACCESS PERMISSIONS

You can assign access permissions to each server item (workflows or workflow groups) to control the access of other users to your workflows and groups.

THE OWNER

The server stores the owner of each server item, which is the user that created the item. When you upload a flow, save a workflow job (an executed flow) or create a new workflow group you are assigned to the new item as owner. When a new server item is created, you can set the permissions how you want this item to be available to other users. Later on, only the owner can change permissions on an item.

USER GROUPS

When the KNIME Server administrator defines the users that have access to the KNIME Server, the users are assigned to groups. Groups can be defined as needed – for example one group per department, or per research group, etc. Each user must be in at least one group, and could be in many groups.

There is a predefined special group called “admin”. Users assigned to that group are considered Server Administrator.

SERVER ADMINISTRATOR

A user that is assigned to the group “admin” is considered a Server Administrator. Administrators are not restricted by any access permissions. Administrators always have the right to perform any action usually controlled by user access rights. They can always change the owner of an item, change the permissions of an item, see all workflow jobs (while regular users only see their own jobs) and they can delete all jobs and items.

WORKFLOW GROUP PERMISSIONS

Read	Allows the user to see the content of the workflow group. All workflows and subgroups are shown in the repository view.
Write	If granted, the user can create new items in this workflow group. One can create new sub-groups and can store new workflows in the group. Also deletion of the group is permitted.

Note: In order to access a workflow it is not necessary to have read-permissions in the workflow group the flow is contained in. Only the listing of contained flows is controlled by the read-right. Also, a flow can be deleted without the write-right in a group (if the corresponding right on the flow is granted).

Also, in order to add a flow to a certain group, you only need the permission to write to that particular group, not to any parent group.

WORKFLOW USER PERMISSIONS

Execute	Allows the user to execute the flow, to create a workflow job from it. It does not include the right to download that job, or even store the job after it finishes (storing requires the right to download).
Write	If granted, the user can overwrite and delete the workflow.
Read	Allows the user to download the workflow (including all data stored in the flow) to its local desktop repository and inspect the flow freely.

Note: Executing or downloading a flow does not require the right to read in the group that contains the flow. In fact, there is currently no right controlling the visibility of a single flow (there is no hidden attribute).

ACCESS TO WORKFLOW JOBS AND SCHEDULED JOBS

There are no permissions to be set on a workflow job or a scheduled job. Only the owner – the user that created the job – can see the job in the repository view, and he/she is the only user that can delete it.

In order to store a workflow job as new workflow in the server’s repository, the user needs the right to download the original workflow (the flow, the job was created from). This behavior prevents an unauthorized user from downloading a workflow by executing it and downloading the resulting job.

“OWNER”, “GROUP”, AND “OTHER” RIGHTS

As the owner of a server repository object (workflow, workflow group or file), you may grant workflow permissions to other users using the group level tools. Permissions for individual users other than the owner are not available.

OWNER RIGHTS

The owner can assign permissions to himself to protect a flow from accidental deletion. He can change his own permissions at any time.

NOTE: The owner can also assign a new owner to a server item – pulling away his right of making any further changes to the access permissions of this item!

GROUP RIGHTS

The owner of a server item can assign permissions to all users of a specific group. If an access right is granted to a group, all users that are in this group have this right.

“OTHER” RIGHTS

Permissions can be set to all users that are not the owner and that are not in one of the groups.

NOTE: Access rights are cumulative and can’t be withdrawn – for example, if you grant the right to execute a flow to “other” users and you define permissions for a certain group of users not including the execute right, these users of that group are still able to execute that flow, as they have obtained that right through the “other” permission settings.

SETTING/INSPECTING ACCESS PERMISSIONS

When a new server item is created, you can assign it access rights through the “Server Workflow Access Permissions” dialog. If multiple new groups are created with one step, the specified permissions are applied to all groups created.

At any time, the owner can change the permissions from the context menu of the server item, and all other users can inspect the permissions through this dialog:

Workflow access permissions

Please set the access permissions for workflow "/ohl/group1/flow1"

The user owning the workflow

Owner name:

Access rights of the owner

- Copy and download workflow
- Overwrite and delete workflow
- Execute workflow

User group permissions

Access rights other users

- Copy and download workflow
- Overwrite and delete workflow
- Execute workflow

Only administrators can change the owner of the server item. Note: Enter the exact name. No spell checking is done. Note: Only the new owner (and administrators) can change permissions from then on.

Grant access rights to you here.

If you want to set group permissions, click here to open the “Group Permissions” dialog.

Each checkmark grants a right to “other” users that are not in one of the groups.

Add group permissions in this dialog:

User Group Permission for the Workflow

Users in one of the groups listed on the left have the assigned rights

Defined groups:

- group1

Define (or change) the rights for a group:

Group name:

Enter the name of a group (must be valid)

Permissions for users in this group

- Copy and download workflow
- Overwrite and delete workflow
- Execute workflow

Enter the name of the group you want to grant access rights. Note: Enter the exact name, no spell checking is done.

Each checkmark grants the corresponding right to all users of the group.

Only groups in the list on the left hand side have permissions granted. Select any group to change the permissions on; Add this group to apply those changes.

SETTING PERMISSIONS RECURSIVELY

In the permissions dialog of workflow groups, there is the option (at the bottom of the dialog) to apply the permissions to the selected group and all elements contained in that group. If you select this option and click OK, the permissions that apply are set on all groups and flows on which you have the right to change the permissions (i.e. the elements you are the owner of).

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