

# Searching For and Viewing Records

## Introduction

The HPE Content Manager Web Client allows you to connect to the University's records system using a web browser. It offers a streamlined interface that includes the most frequently used HPE Content Manager features.

Processes for editing documents in the Web Client are similar to the full HPE Content Manager system, but with some variations to the Check In process.

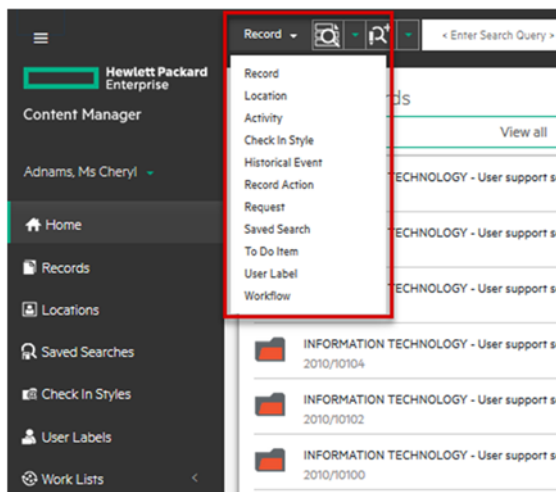
**Note:** Chrome and Firefox are recommended browsers. Internet Explorer may not provide an optimal user experience with the Web Client.

## Procedure

### Search for Records

Items you can search for in the Web Client include: Record, Location, Record Action, Request, Saved Search, Activity, Email Link, Request, To Do Item, and Workflow.

1. On the left of the Search Query field, you'll see a dropdown menu. Select **Record** from this menu.

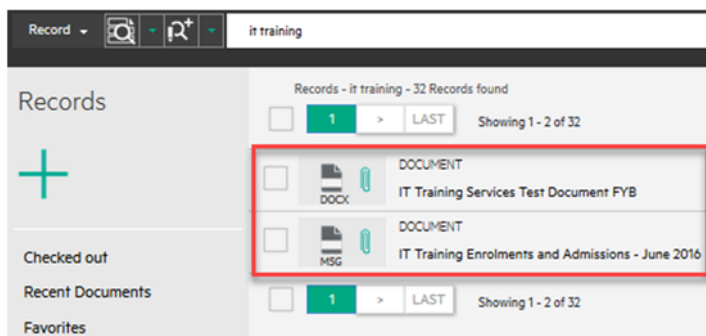


**Note:** In most instances Record will be the default already selected, this will run a search which includes all documents and files.

2. Type keywords into the Search Query field to search for records, and either hit **Enter** or click the magnifying glass icon to initiate the search.



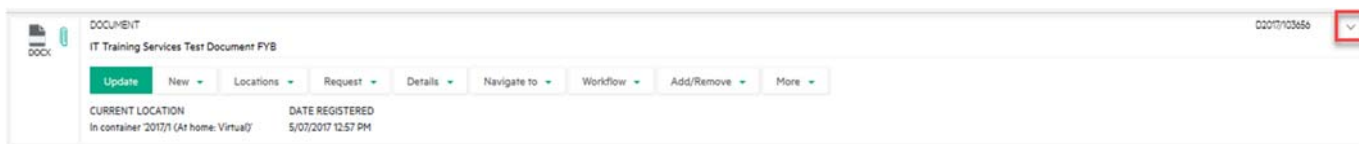
Records will display on the right of the screen.



The number of results will be displayed at the top of the list. Results may include both Files and Documents; these are clearly indicated by an icon on the left and a label above the record title.

## Viewing Record Information

Click the **arrow icon** next to record number to expand the record information (including Location and Date Registered), and to access functions that can be carried out on the record.



There are nine action buttons:

**Update** - Amend or add additional information to the title or the record, change author or addressee. The File number cannot be changed. Contact Records Services to transfer to another file.

**Locations** – Drop Down allows user to “Set Current Location” of record.

**Request** – Place a request on a file record (Note documents cannot be requested).

**Details** – Add a Note, Add or Remove Related Records, Add Additional Fields.

**Navigate to** – Related Records, Container Records + Alternative (Documents within File) Container Records (File Documents belong to).

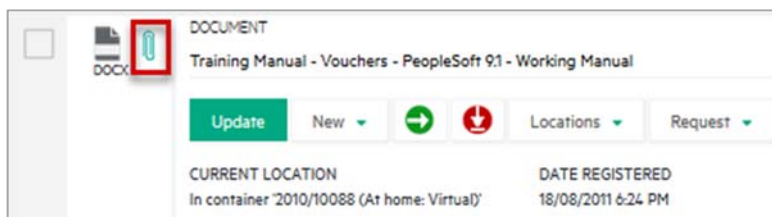
**Workflow** – Attach Actions, Attached Actions/Procedures, Workflow, To Do Item.

**Add/Remove** – Add records to favourites, recent documents, work tray and remove from trays.

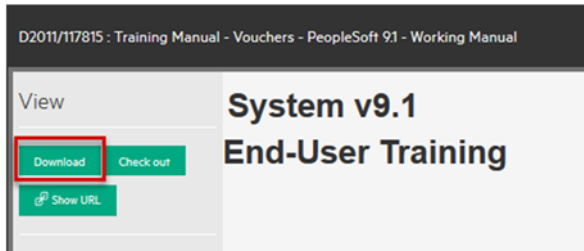
**More** – Show Report, Active Audit Events on records, View Security Access on a record.

## Previewing Records

1. On your chosen record in the list of search results, click the **arrow <** at the far right of the record number to expand further information.
2. Click the **paperclip** icon to preview the document.



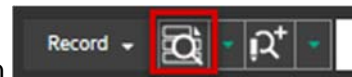
3. If you then want to edit the document click **Download**. A Word document will open in Microsoft Word, a spreadsheet will open in Excel, etc.



4. To leave Preview mode, click **Close** on the very far right of screen.

## Advanced Record Searching

1. For advanced record searching, click this icon
- The records Form Search will display.



2. Click **arrows** < to expand the search fields and enter the search criteria, eg: Title Word or if searching by dates, click the arrow to expand the Dates field. Enter the search dates in either the Date Created or Date Registered fields as required, then click Search.

**Form Search**

Text

Title Word  
it training

Notes Word

Document Content

Any Word

People & Places

Dates

Date Created Date range

From 26/06/2017 To 19/07/2017

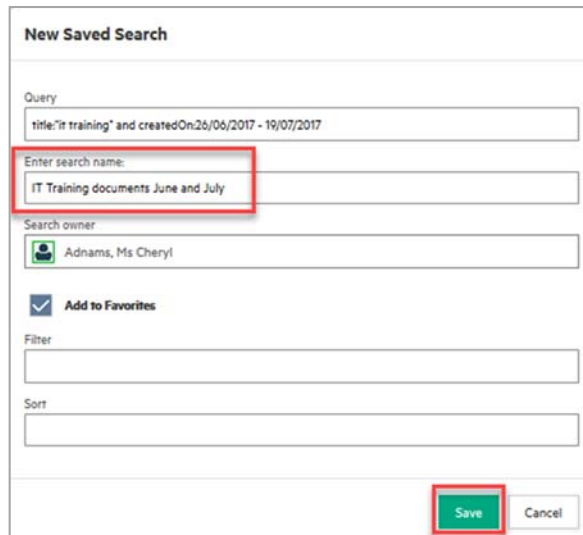
Search Cancel

## Saving a Search

1. Click **Save** to save a search.

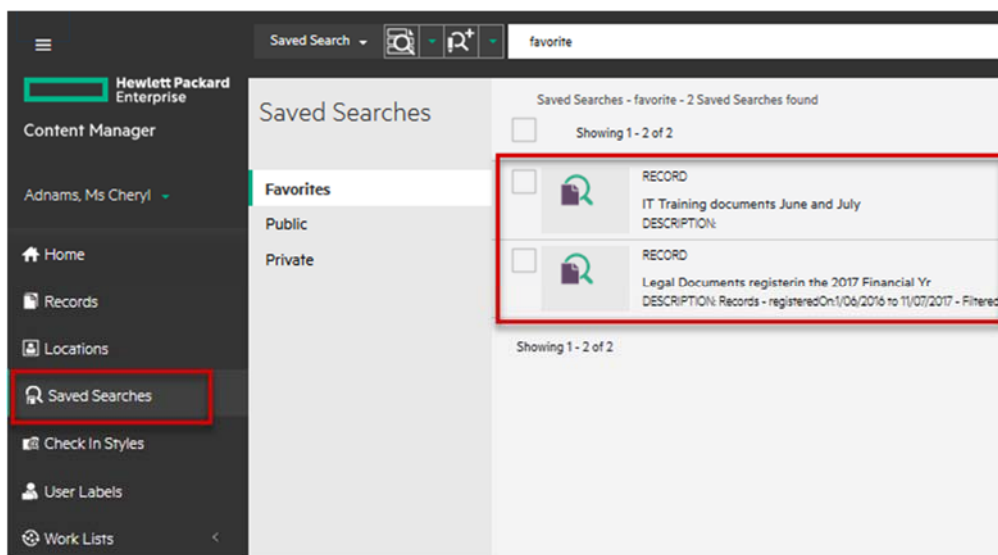


The **New Saved Search** window will appear.

A screenshot of the 'New Saved Search' form. The form contains several fields: 'Query' with the text 'title:"it training" and createdOn26/06/2017 - 19/07/2017', 'Enter search name:' with the text 'IT Training documents June and July', 'Search owner' with the name 'Adnams, Ms Cheryl', and a checked 'Add to Favorites' checkbox. There are also 'Filter' and 'Sort' fields. At the bottom right, there are 'Save' and 'Cancel' buttons. The 'Enter search name:' field and the 'Save' button are highlighted with red rectangular boxes.

2. Enter details about your search criteria and give it a name in the **Enter search name** field.
3. Tick **Add to Favourites**.
4. Click **Save**.

When you add a saved search to Favourites, it will appear in the **Saved Searches** area on the menu bar.



## Contact Us

For further support or questions, please contact Records Services on **8313 5334** or [records.services@adelaide.edu.au](mailto:records.services@adelaide.edu.au)