

# Content Manager (CM)

## Web Client - Amending and Editing Documents

### Introduction

The 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 Content Manager features.

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

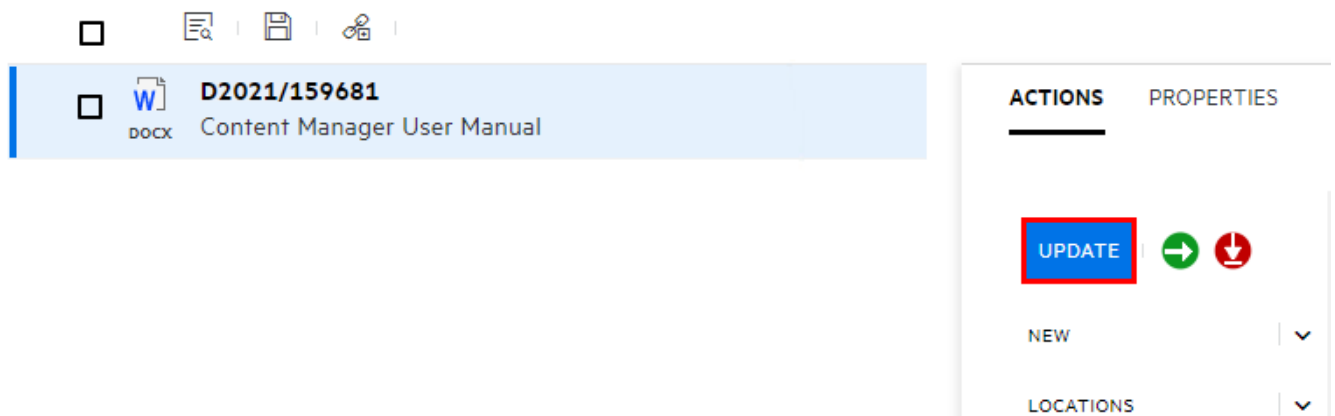
**Note:** Chrome and Firefox are recommended browsers. Internet Explorer may not provide an optimal user experience with the Web Client.

### Amending Document Properties

1. To update properties of a record, highlight the record and click **Update**.

Query - uri:4392677

Total Results: 1 Record

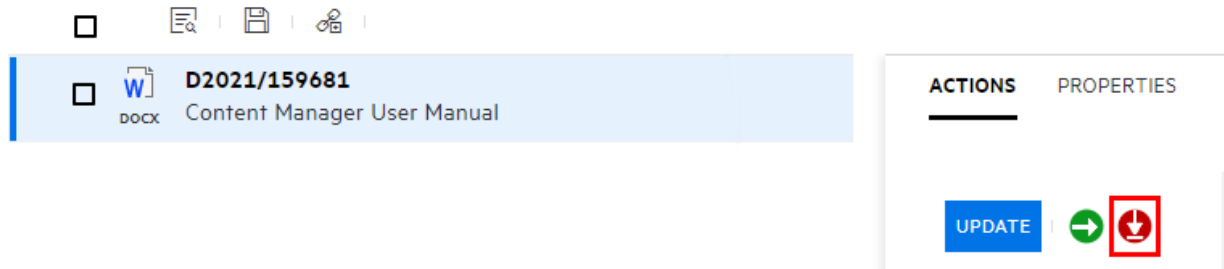


The screenshot displays the Content Manager Web Client interface. At the top, it shows a query 'uri:4392677' and 'Total Results: 1 Record'. Below this, a document record is listed with a checkbox, a document icon, the ID 'D2021/159681', and the title 'Content Manager User Manual'. To the right of the record, there is a panel with two tabs: 'ACTIONS' and 'PROPERTIES'. The 'ACTIONS' tab is active, and it contains a blue 'UPDATE' button (highlighted with a red box), a green right arrow icon, and a red down arrow icon. Below these icons, there are sections for 'NEW' and 'LOCATIONS', each with a dropdown arrow.

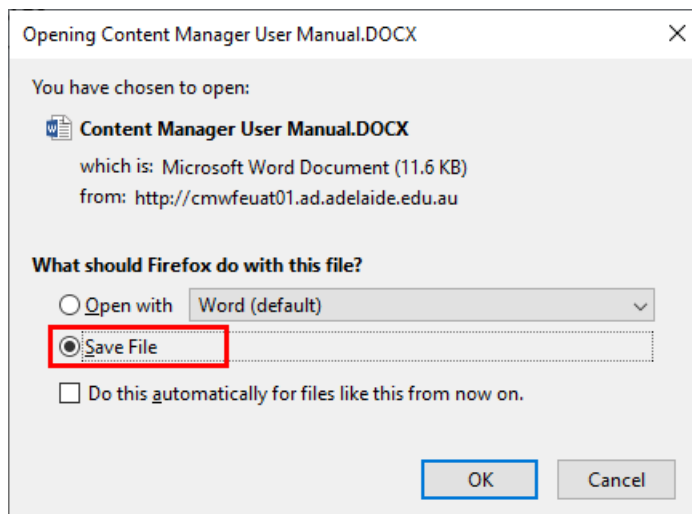
2. The document registration form will display, and you can amend record information, eg title, category etc.
3. Click **Save** when you've finished making changes.

## Checking out to Edit

1. To edit the document, select **Check Out**.



2. Depending on your Browser settings a pop up will appear prompting you to either Open or Save the document to a location. Choose **Save** and choose a location to save the document (e.g. your desktop or C: drive).



**Note:** If your Browser does not give you a choice to choose a location to Save the file to it will go to your Download folder

**Note:** If you choose Open, the record will open in read only format; you will need to save it in order to make changes.




3. Update the record as required, and **save the document** in its native application (i.e. Word, Excel etc), **then close** it..


## Checking in an Edited Document

An edited document needs to be attached as a **new revision** and **Checked In**. The Web Client does not integrate with Microsoft Office applications and automatically check back in edited documents upon closing, as in the full Content Manager software.


1. In the Web Client Interface, expand the record information, and click **Check In**.

Total Results: 1 Record

☐   

☐  **D2021/159681**  
Content Manager User Manual

**ACTIONS** **PROPERTIES**

**UPDATE** 

A Check-In Record pop-up appears.

**CHECK IN RECORD**


Record Number D2021/159681

☒ **Make a new revision**

☐ Discard any modifications made

Comments

Attach electronic document

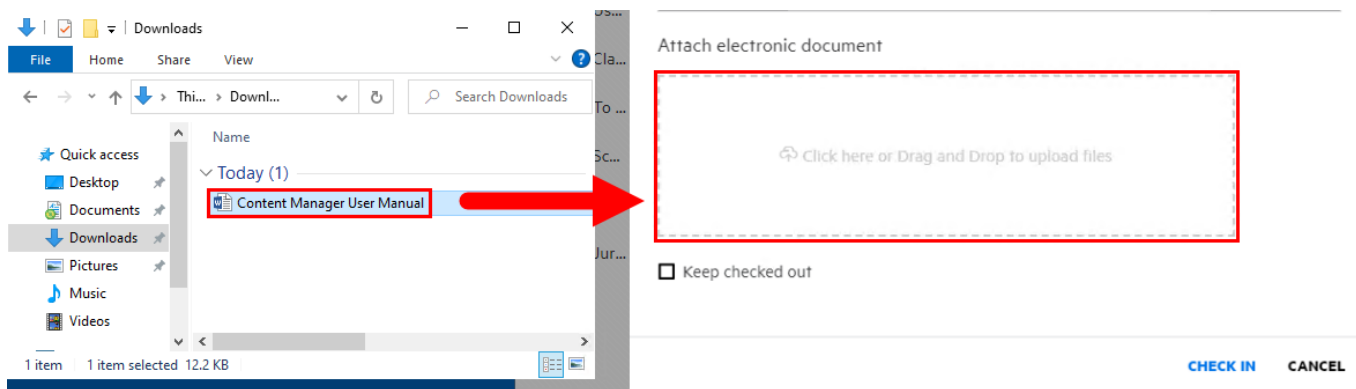
 Click here or Drag and Drop to upload files

☐ Keep checked out

**CHECK IN** **CANCEL**

2. Select **Make a New Revision**.

3. Open a **Windows Explorer** window and navigate to your saved version of the edited document. Drag and drop it into the Attach electronic document box in the Web Client interface.



You'll see the attachment appear.

#### CHECK IN RECORD

Record Number D2021/159681

☒ Make a new revision

☐ Discard any modifications made

Comments

Attach electronic document

Click here or Drag and Drop to upload files

Content Manager User Manual.DO...

12.56 KB

100%

REMOVE

☐ Keep checked out

CHECK IN

CANCEL

4. Click **Check In**. Your edited version of the document will appear as a new revision.

## 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)