

Content Manager (CM)

Web Client – Searching and Viewing Records

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.

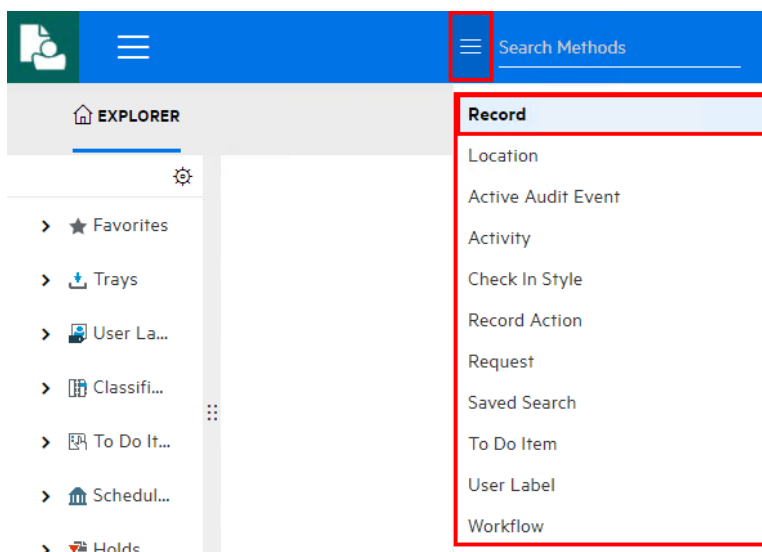
Note: Chrome and Firefox are recommended browsers. Internet Explorer may not provide an optimal user experience with the Web Client.

Procedure

Search for Records

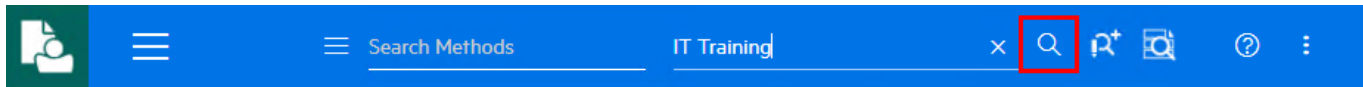
Items you can search for in the Web Client include: Record, Location, Record Action, Request, Saved Search, Activity, Email Link, Request, To Do Item, and Workflow.

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

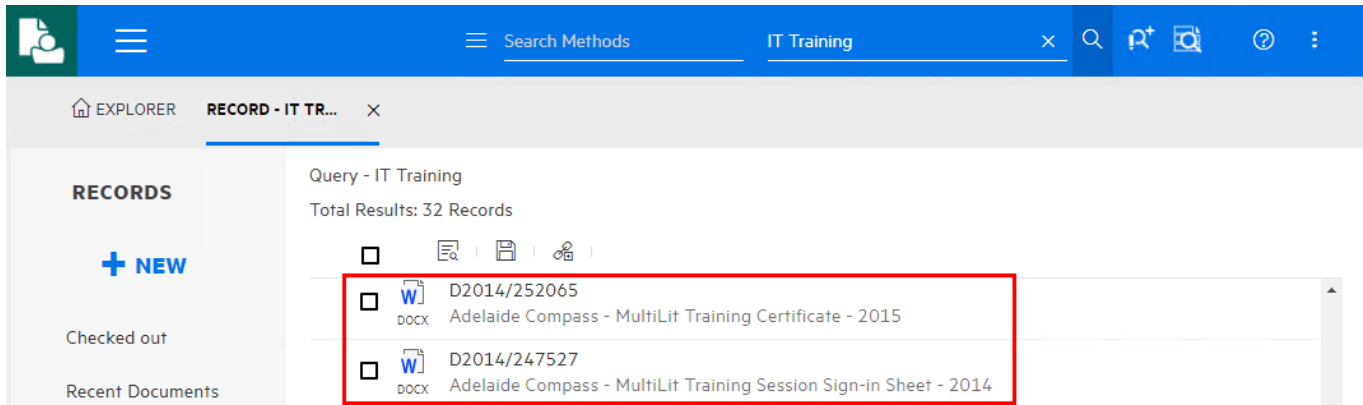


Note: In most instances Record will be the default already selected, this will run a search which includes all documents and files.

2. For extra specificity you can click into the Search Methods field to set the search method
3. 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 in the middle of the screen.



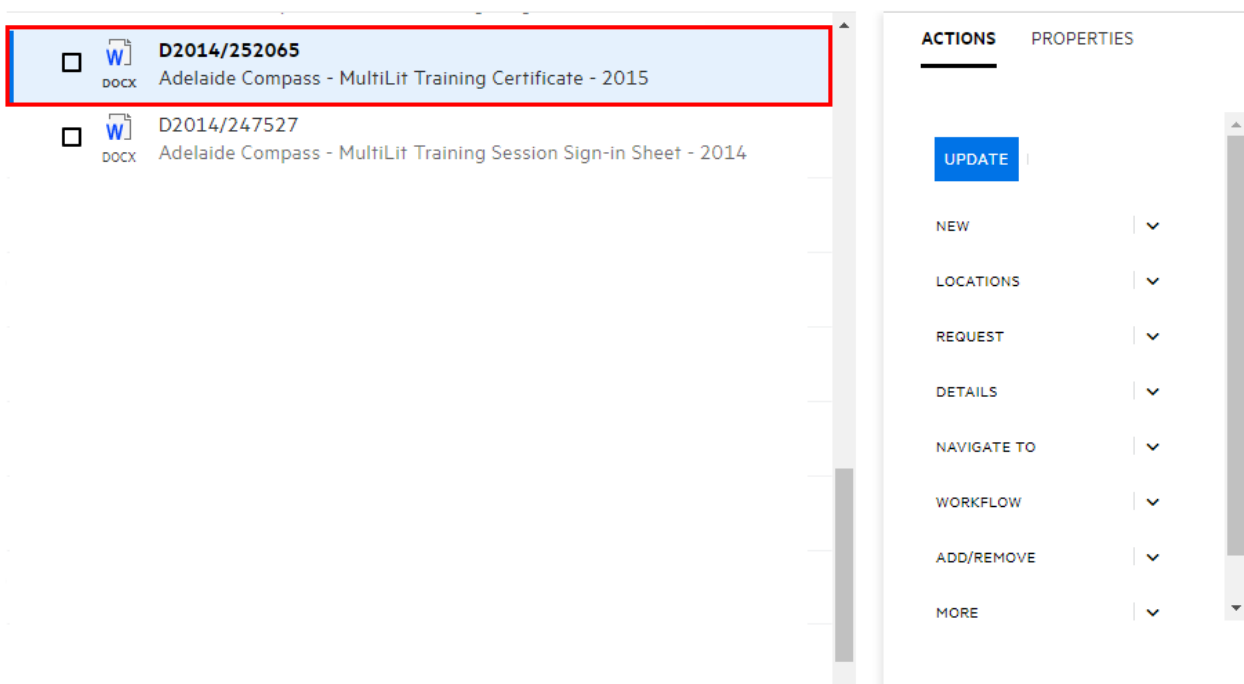
The number of results will be displayed at the top of the list. Results may include both Files and Documents; these are clearly indicated by an icon on the left and a label above the record title.

Viewing Record Information

Click on the record and on the right side of the screen an information pane will open.

This will provide access to the Record Properties and the Actions that can be carried out on the Record.

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 options within the Actions tab:

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.

New – Create a New Version of the Record

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, and Copy URL

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

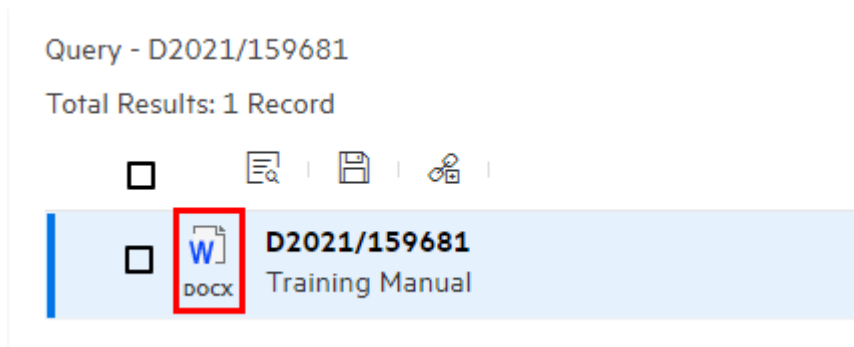
Workflow – Initiate Workflow from Template, Attach Actions, Attached Actions/Procedures, Workflow, To Do Item.

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

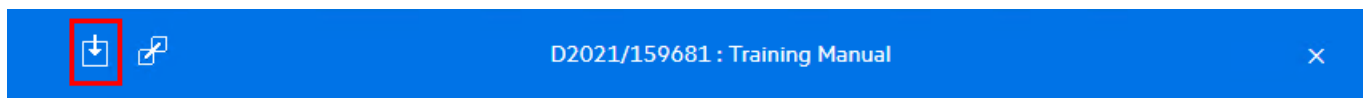
More – Make Final, Show Report, Active Audit Events on records, View Security Access on a record.

Previewing Records

1. On your chosen record in the list of search results, click the record icon to preview the document.



2. 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.

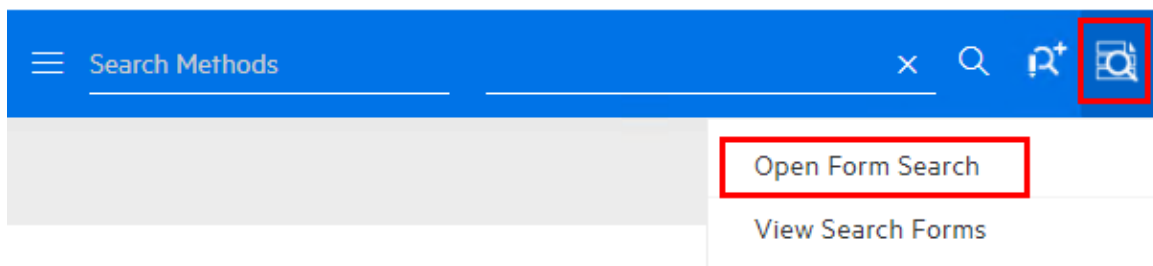


To leave Preview mode, click **Close** on the far right of screen



Advanced Record Searching

1. For advanced record searching, click the Form Search icon and click Open Form Search



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

FORM SEARCH FILTER RECORD TYPE

TEXT ∨

Title Word
User Manual

Notes Word

Document Content

Any Word

PEOPLE AND PLACES <

DATES ∨

Date Created Date range ∨

From To

DD/MM/YYYY hh:mm:ss 📅 DD/MM/YYYY hh:mm:ss 📅

Date Registered String format ∨

NUMBERS <

SEARCH

CANCEL

Saving a Search

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

Total Results: 34 Records



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

NEW SAVED SEARCH

Query

title:User Manual


Enter search name:

Content Manager User Manual Search

Enter search description:

Record - title:User Manual

Search owner

 Eric Swinbourn

Add to Favorites

Filter

type:all

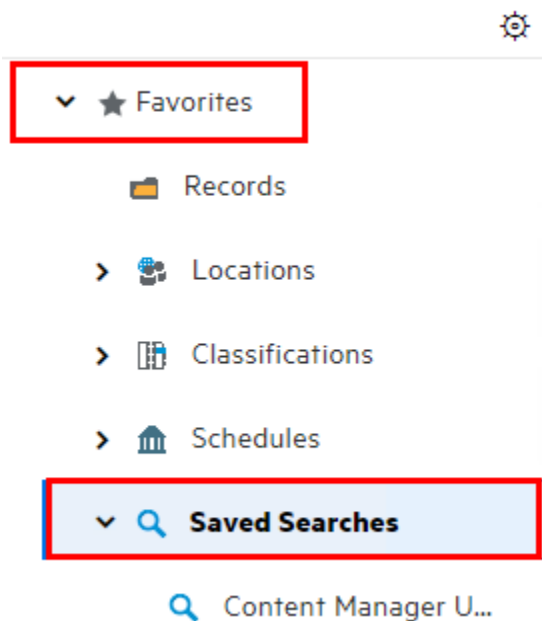
Sort

SAVE

CANCEL

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 under the **Favourites, 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

