

User Manual – Content Navigator

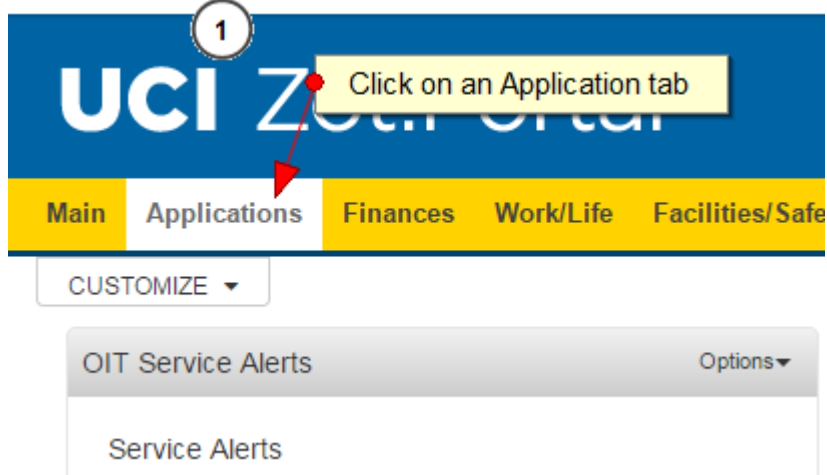
Revised Date	Description/Changes	Revision	Revised by
June 21, 2018	A new guideline for Content Navigator	1.0	Derek Olson / Linh Nguyen
May 15, 2020	Added Share files securely via OneDrive (p. 15) Added 'Move to Recycle Bin' (p. 17)	2.0	Ce Li

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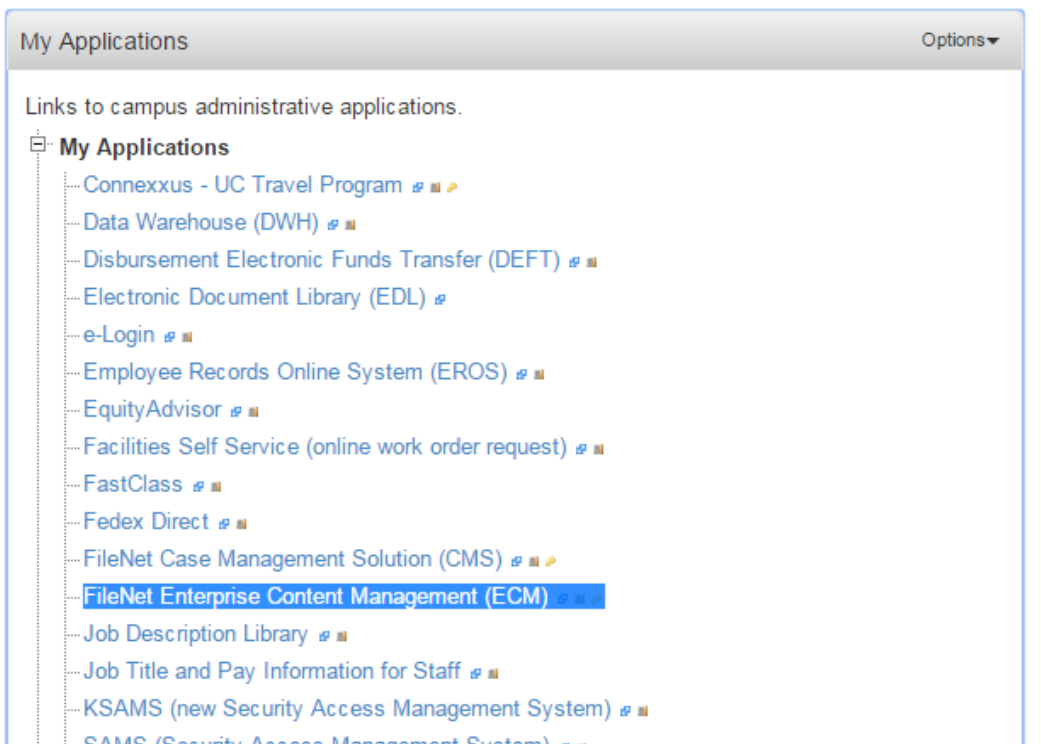
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Login

- Launch a browser (Firefox, Chrome, IE)
- Go to UCI Zot!Portal, <https://portal.uci.edu>
- Click on an **Applications** tab



- Click on **FileNet Enterprise Content Management (ECM)** under **My Applications** widget



- Login with your UCInetID and password. If you have Duo enabled, you will receive a push notification.

Login with your UCInetID

The resource you requested requires you to re-authenticate.
You may also log out and log back in as another user.

UCInetID
Example: ptanteater

Password

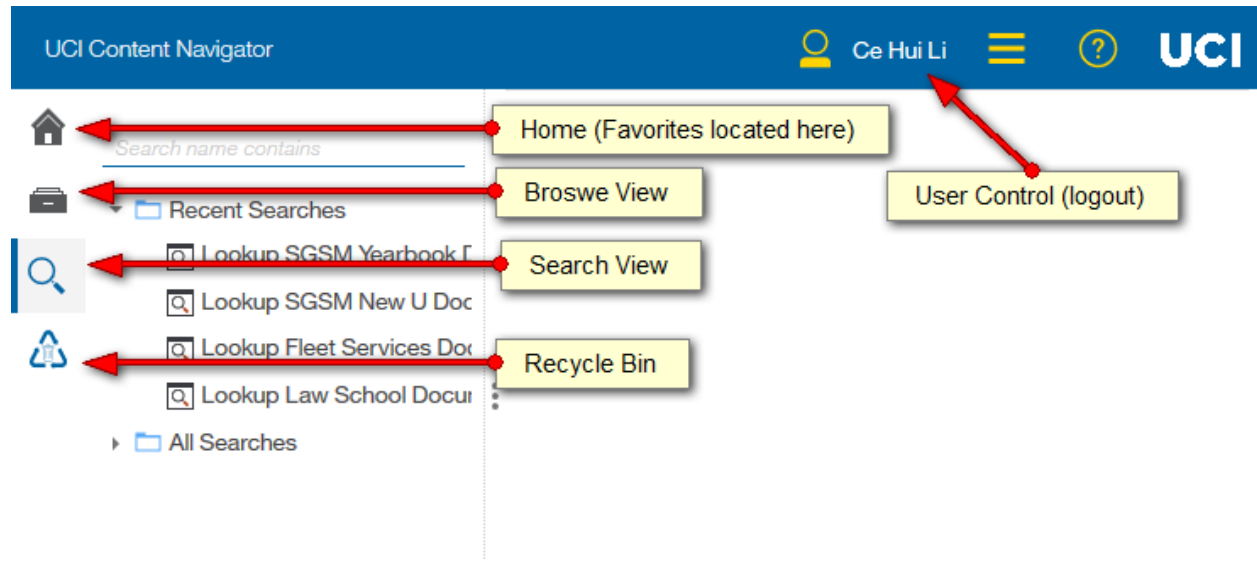
[Forgot your password?](#)

Login

[Activate my UCInetID](#) • [Need help logging in?](#)

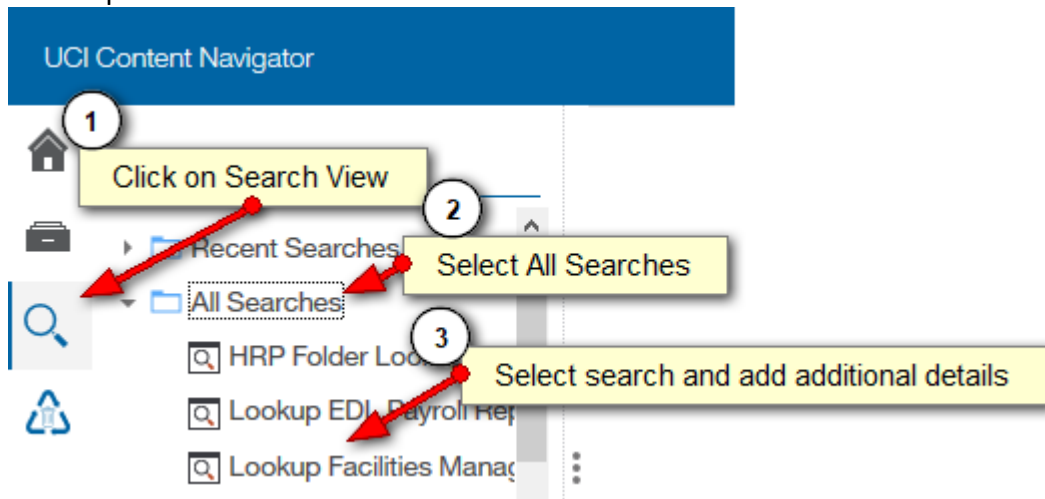
[View recent account activity](#)

Understand a Main Dashboard



Search/Lookup for a Document

1. From a main navigator, click on a **Search** button on the left menu
2. Select "All Searches" folder
3. Select a pre-defined search



Text Search Tips

1. **Matching Term Exactly:** Surrounding a name or phrase with double quotation marks (") returns search results that contain that exact phrase in the order that the words are displayed in the query.
2. **Searching for unknown or variable characters or terms: (*) or (?)**

Wildcard characters, such as an asterisk (*) or question mark (?), are useful when you are not sure of the spelling, exact name, or variations of a term. Use the asterisk (*) to match none or multiple characters, but only one term. Use the question mark (?) for a single character.

Using (*) example, the query **czech*** returns documents with the terms **czech**, **czechoslovakia**, **czechoslovakian**, and **other words that start with the characters czech**, including the word czech without any following characters.

You can also use the wildcard characters in a phrase search. For example, the query John * Kennedy returns documents with the terms John Fitzgerald Kennedy and John F Kennedy.

Using (?) example, the search term **ra?or** matches **razor** or **rasor**, but not raptor. Multiple question marks in a row stand for the same number of characters as there are question marks. For example, **psych????y** matches either **psychology** or **psychiatry** but not **psychotherapy**.

Understand a Search Results window

Search Results

Refresh New Actions Search Results

1 Showing results for: Lookup Student Affairs General Documents

Name	Size	Modified By	Modified On
170208-07.01.PDF	10 KB	FileNet Administrator	7/7/2017, 12:28 PM
Restorative Justice-1001	8 KB	FileNet Administrator	6/27/2017, 1:27 PM
Restorative Justice-1001	7 KB	FileNet Administrator	4/3/2017, 4:16 PM
Restorative Justice-1001	7 KB	FileNet Administrator	4/3/2017, 2:36 PM
Restorative Justice-1001	8 KB	FileNet Administrator	4/6/2017, 11:26 AM

Properties

Class: SA General Documents

Document Title: 170208-07.01.PDF

System Properties

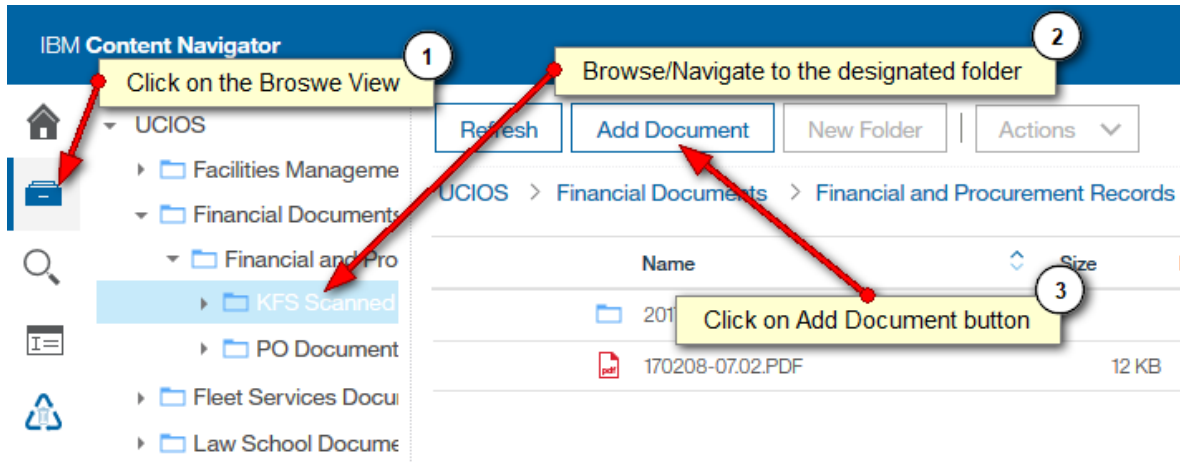
Document Properties Panel

- View options: FileNet Content Navigator comes with 3 different view modes: Detail, Magazine and Filmstrip View.

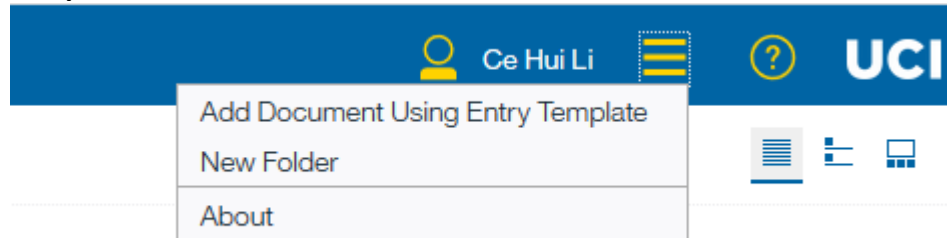
Add New Document

FileNet is a file folder system similar to your windows file system. There are multiple ways to add a new document to FileNet:

1. You can browse/navigate to a designated folder, then click on the **Add Document** button



2. Or you can click on the Quick tool button and choose **"Add New Document using Entry Template"**



3. Choose file to add and enter document information

Add Document by Using Entry Template

When you add a document by using an entry template, the values that you enter for the document are consistent. [Learn more](#)

General

* Entry template: Fleet Services Document Entry Template

* Save in: General Fleet Service Documents

What do you want to save? Local document

* File name: Browse... No files selected.

Major version

1 Click here to choose a file from your computer

Properties

* Class: Fleet Service Document

2 Enter document information

Document Title: _____

FS Document Type: _____

Unit Number: _____

Vin Number: _____

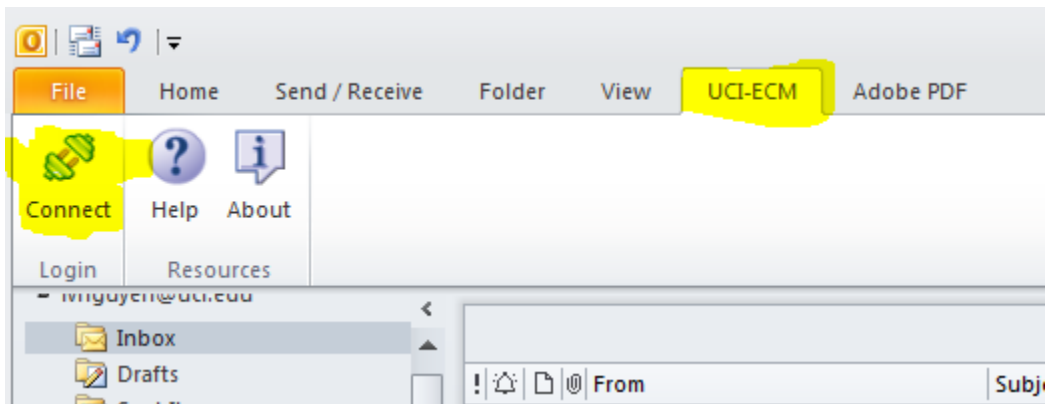
3 Click here to add a new document

Add Cancel

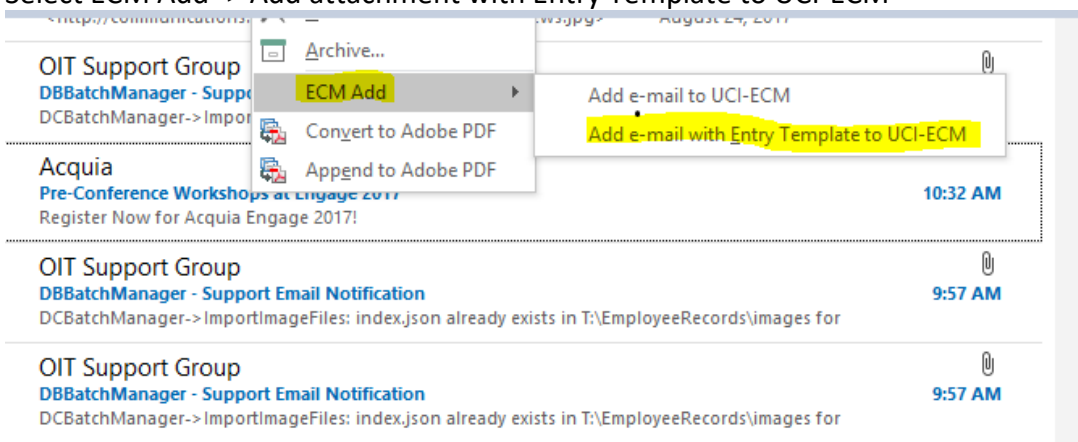
Add an Email Message via MS Outlook

Note: you need an IBM plug-in for Microsoft Office. Please contact OIT Helpdesk to install the plug-in on your PC.

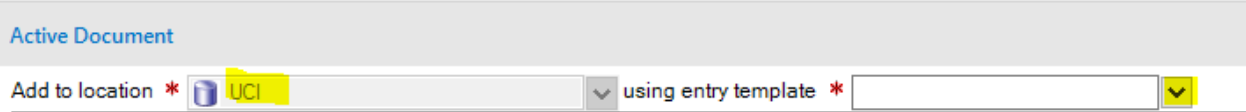
1. Open email, click attachment and view within MS Outlook. (Note: do not download the PDF)
2. Launch KFS website, <https://systems.oit.uci.edu/kfs/portal.do>
3. Lookup and update change in KFS.
4. Write down KFS Vendor number or copy it to a clipboard
5. Go back to MS outlook,
6. Click a **UCI-ECM** button on the toolbar
7. Click on a **Connect** button





8. Login with your UCInetID and Password
9. Go to your Inbox or any email box, right-click an email
10. Select ECM Add -> Add attachment with Entry Template to UCI-ECM



11. Choose **UCI** from a “Add to Location” dropdown list

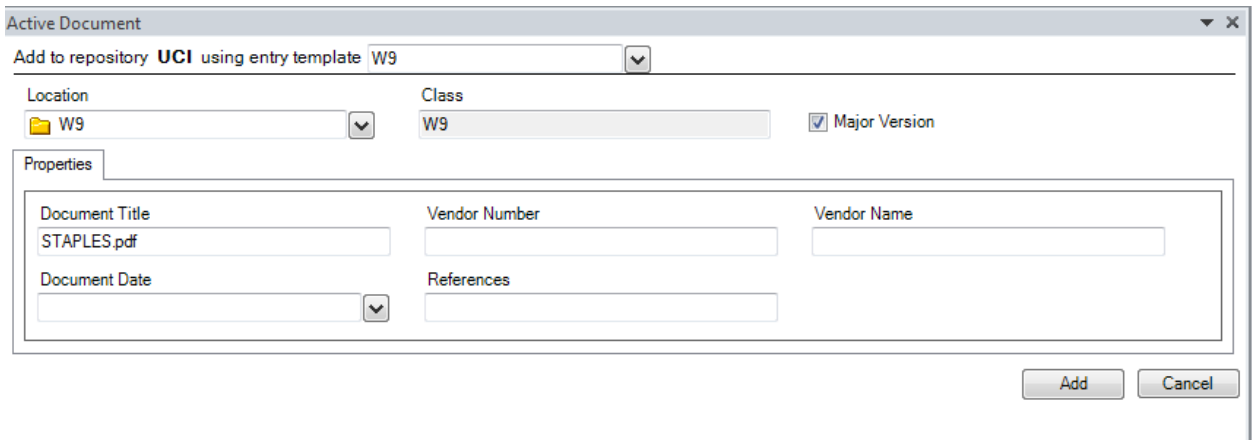


Active Document

Add to location *  UCI using entry template * 


12. Choose your template from the “Using entry template” (e.g., W9)

13. Enter Document’s information and click on an Add button.



Active Document

Add to repository UCI using entry template W9

Location  W9 Class W9 Major Version

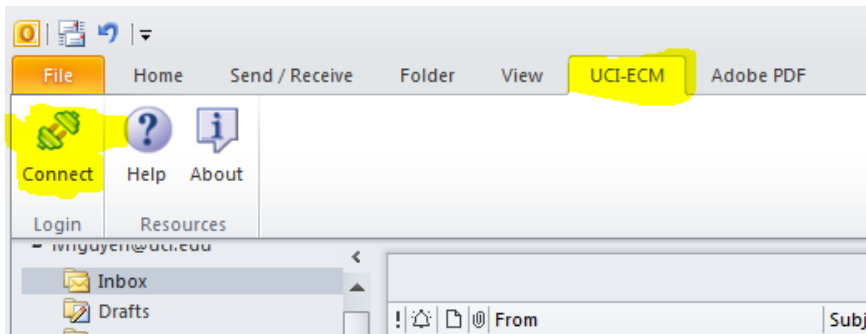
Properties

Document Title	Vendor Number	Vendor Name
STAPLES.pdf		
Document Date	References	

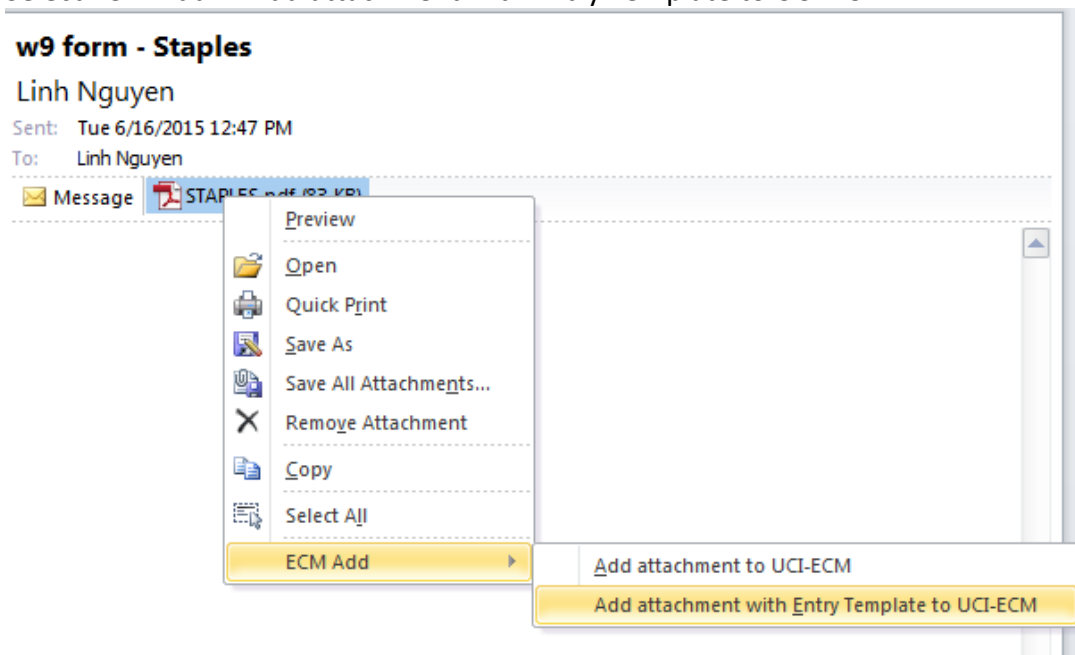
Add Cancel

Add an Email Attachment via MS Outlook

1. Open email, click attachment and view within MS Outlook. (Note: do not download the PDF)
2. Launch KFS website, <https://systems.oit.uci.edu/kfs/portal.do>
3. Lookup and update change in KFS.
4. Write down KFS Vendor number or copy it to a clipboard
5. Go back to MS outlook,
6. Click a **UCI-ECM** button on the toolbar
7. Click on a **Connect** button





8. Login with your UCInetID and Password
9. Go to the email, open the message, then right-click on email's attachment.
10. Select ECM Add -> Add attachment with Entry Template to UCI-ECM



11. Choose **UCI** from a "Add to Location" dropdown list

12. Choose W9/ACH from the “Using entry template”


Active Document

Add to location *  UCI using entry template * 

13. Enter Document’s information and click on an Add button.

Active Document

Add to repository **UCI** using entry template W9

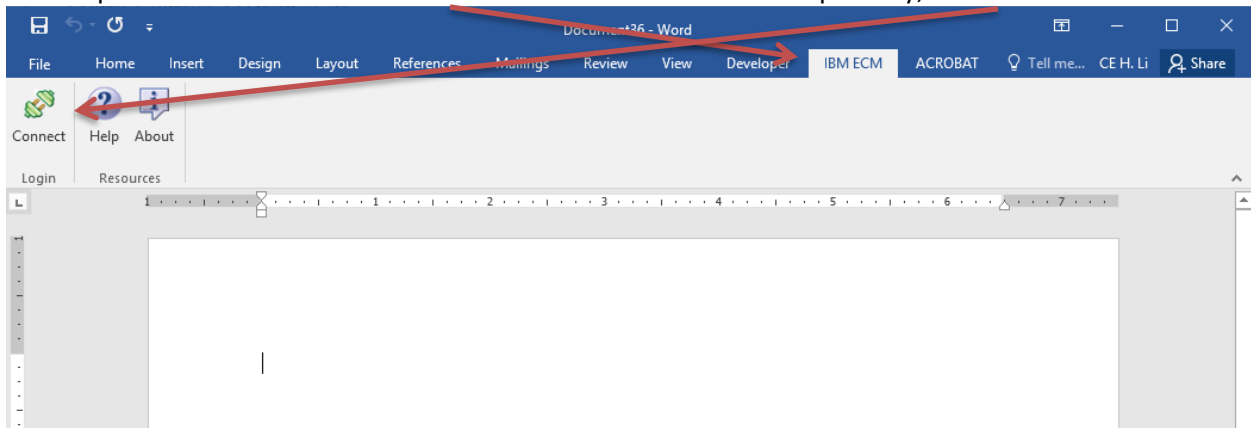
Location  W9 Class W9 Major Version

Properties

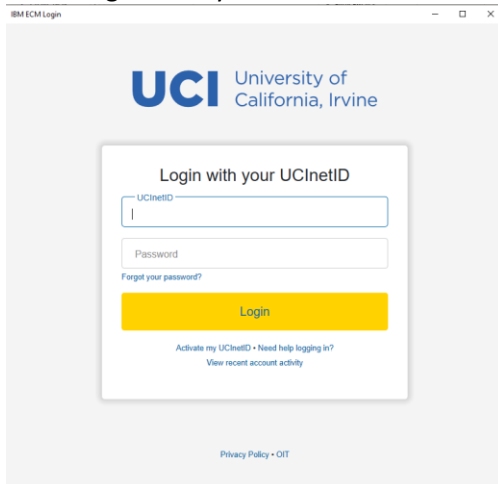
Document Title	Vendor Number	Vendor Name
STAPLES.pdf		
Document Date	References	

Add New Document via MS Word

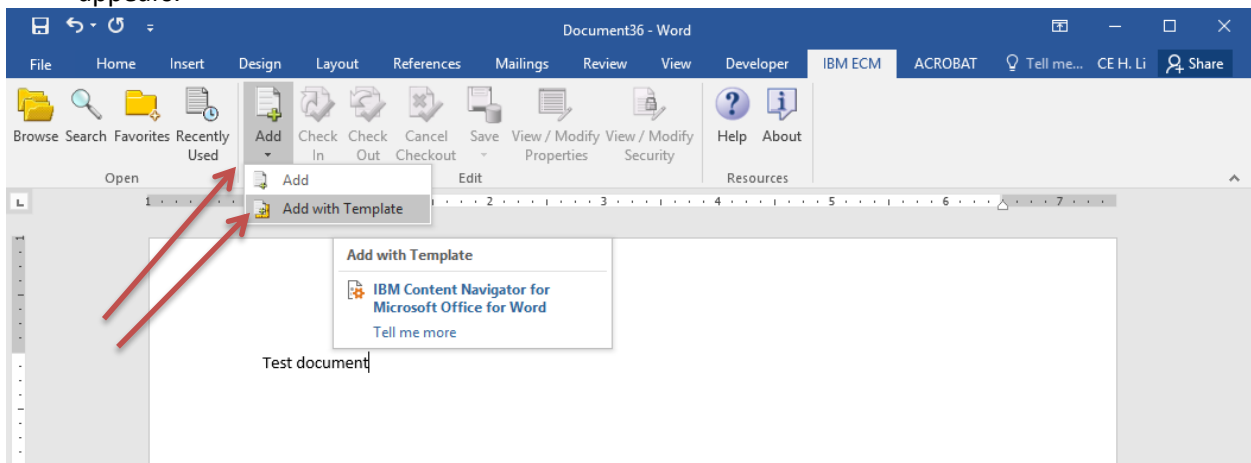
- Open Word and click on **UCI-ECM** to connect to the FileNet Repository, then **Connect**



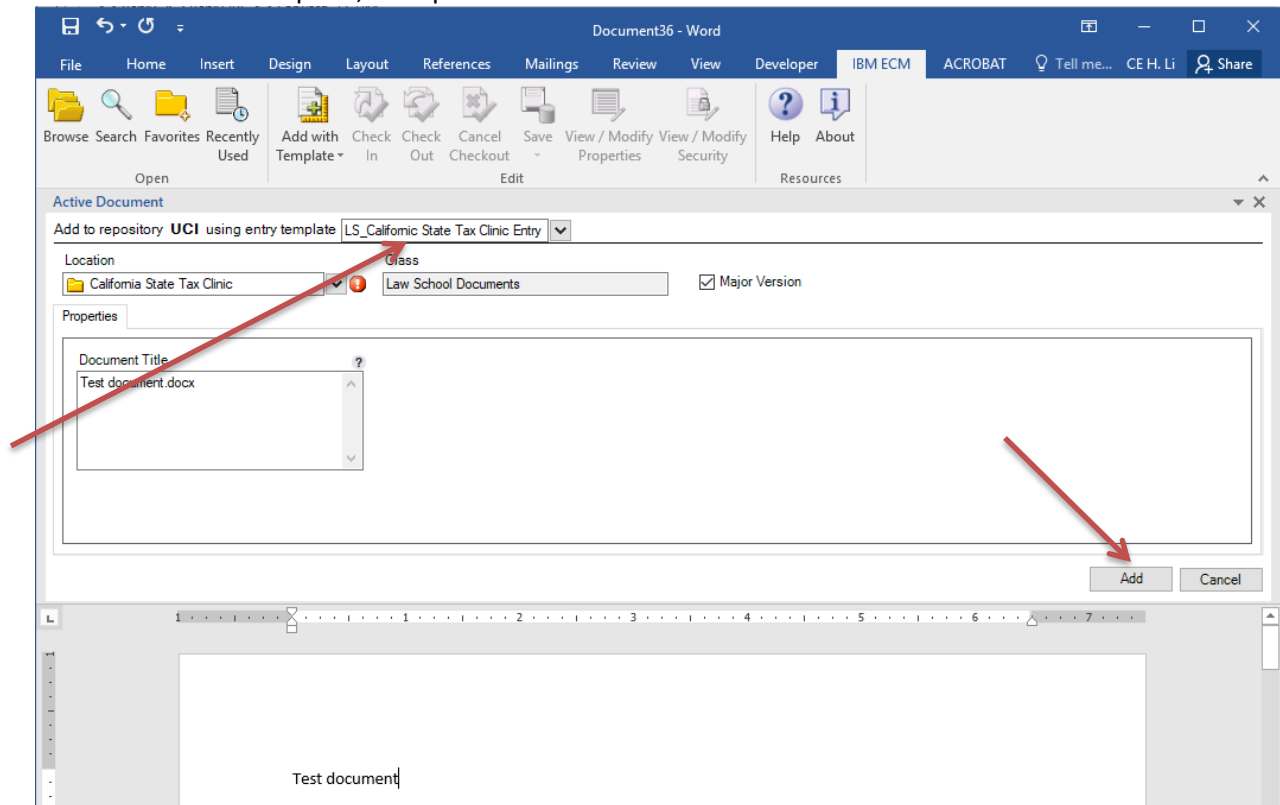
- Log in with your UCInetId



- Create document, then press **Add**, then **Add with template** from the dropdown menu that appears.



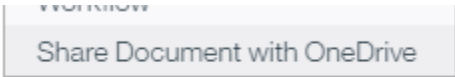
- Choose the template, then press **Add**



- Add document from repository

Share Files Securely via OneDrive

This feature is for sharing documents with someone that may not have or need access to FileNet. This allows for users who have FileNet access to share documents with outside venders or other departments on campus and so forth. OneDrive is regulated and approved for sensitive and restricted data so even PII can be shared securely. Recipients do not need to have their own OneDrive account. Shared documents have retention built in. Here are the steps to share a document securely:



1. Right-click a document you want to share
2. Click **Share Document with OneDrive**
3. Type in the email you want to share the document with and select the retention period which you want the document to stay on OneDrive.
4. Optional: check the checkbox to receive a copy of the email sent to the recipient. Your email should show up if the checkbox is checked.
5. Click **Share**

Share Document with OneDrive


Complete the following to share this document with users outside of FileNet, securely, using OneDrive.
A OneDrive account is not required for you or the recipient.

Document Name: TEST.pdf

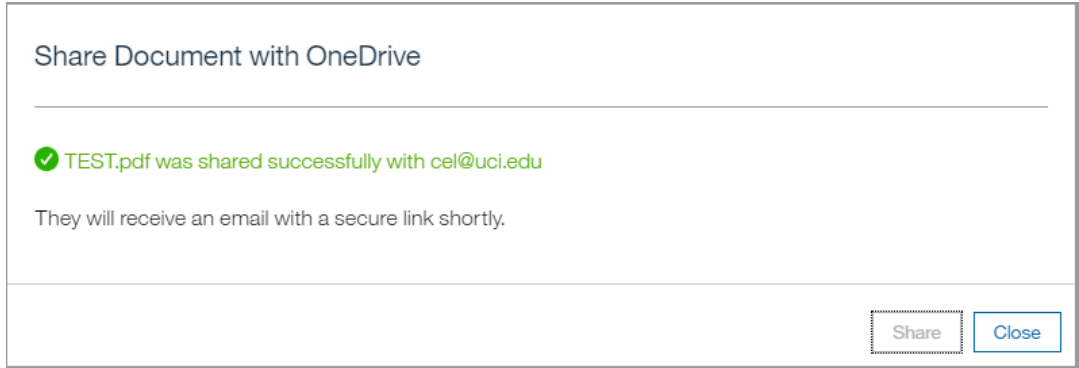
Recipient's Email:
Enter the email address of the individual you would like to share with. They will receive a secure link to access the file.

Send me a copy:
Check if you want a copy of the secure link to be sent to your email address.

Your Email:

Retention Period: 
How long the secure link will be valid for (in days).

A successful share will return this screen

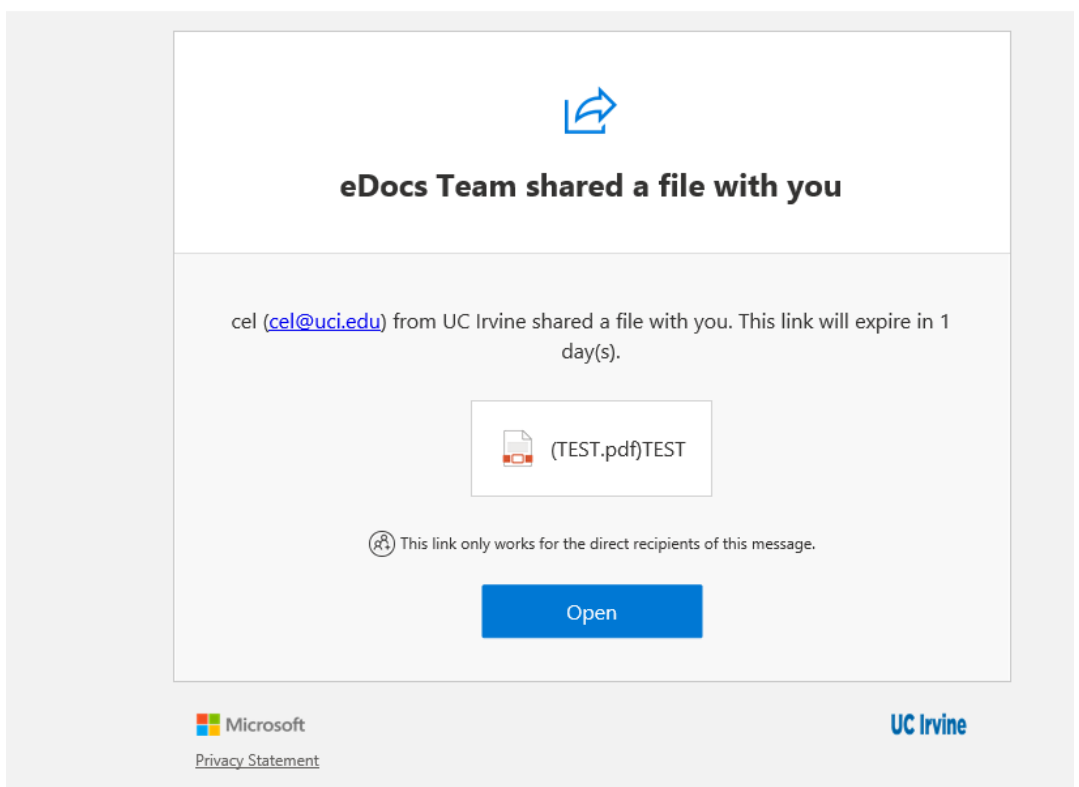


And an example email that will be received by the recipient

eDocs Team

eDocs Team shared "(TEST.pdf)TEST" with you.

problems with how this message is displayed, [click here to view it in a web browser.](#)



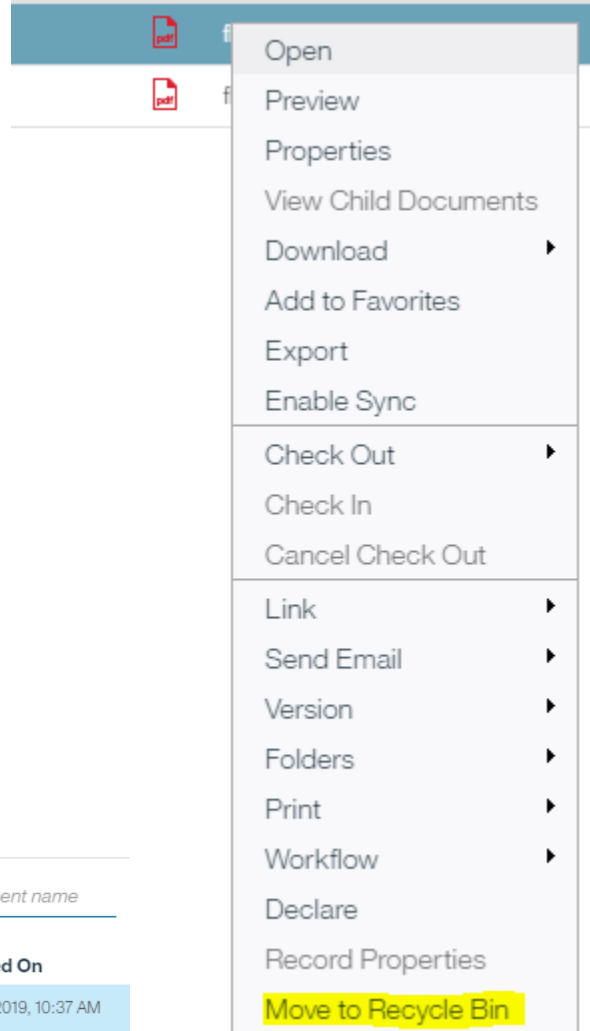
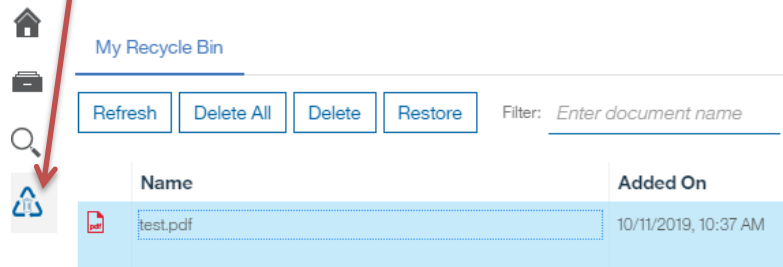
Move to Recycle Bin

Deleting a Document in FileNet is permanent with no way to recover so **Recycle Bin** has been implemented to give users a chance to recover documents. Recycled documents have a 180 day retention period in which they can be recovered. Here are the steps to move to recycle bin:

- Right-click the document you want to move to the recycle bin
- Select **Move to Recycle Bin**

Steps to restore a document:

- Go to the **Recycle Bin** which is located on the menu at the left side of the screen
- Select the document you want to restore
- Click **Restore**



If deletion is the end goal, you are able to permanently delete the document once you locate it in the recycle bin.