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)	2.0	Ce Li
	Added 'Move to Recycle Bin' (p. 17)		

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Login

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

U		Click on a	n Application	
Main	Applications	Finances	Work/Life	Facilities/Safe
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OI	T Service Alerts			Options ▼
\$	Service Alerts			

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

My Applications	Options ~
Links to campus administrative applications.	
[⊟] [.] My Applications	
Connexxus - UC Travel Program 🖉 🖬 🖉	
Data Warehouse (DWH) 🕫 🖬	
Disbursement Electronic Funds Transfer (DEFT) #	
Electronic Document Library (EDL) @	
e-Login 🕫 🖬	
Employee Records Online System (EROS) # II	
EquityAdvisor 🕫 🖬	
Facilities Self Service (online work order request) #	
FastClass 🖉 🖬	
Fedex Direct 🕫 🖬	
FileNet Case Management Solution (CMS) 🖉 🖬 🖉	
FileNet Enterprise Content Management (ECM)	
Job Description Library #	
Job Title and Pay Information for Staff 🖉 🖬	
KSAMS (new Security Access Management System) @ ■	
CAMC (Coourity Access Management Cystem)	

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

UCI University of California, Irvine

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

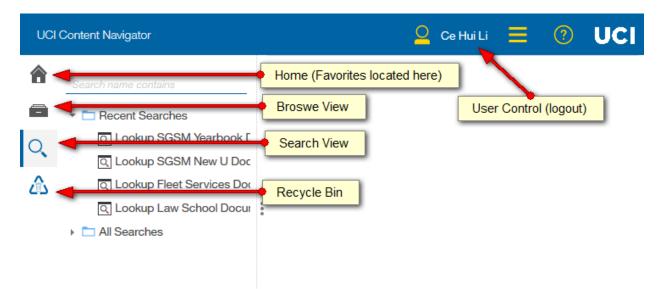
Forgot your password?

Login

Activate my UCInetID • Need help logging in? View recent account activity

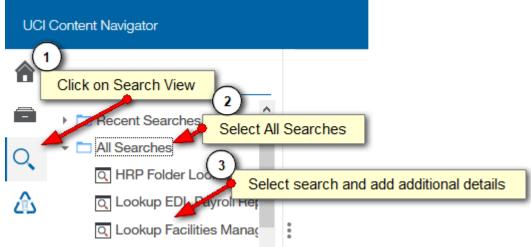
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Understand a Main Dashboard



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??? matches either psychology or psychiatry but not psychotherapy.

Understand a Search Results window

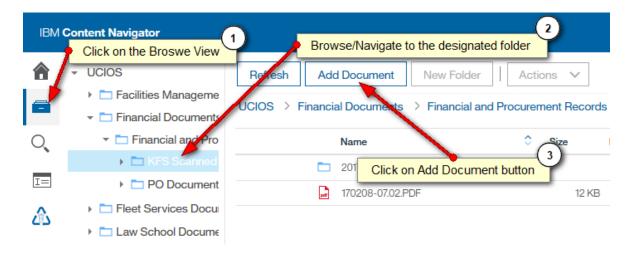
Search Results Refresh New v Actions v Showing results for: Lookup Student Affairs General	Search Results]			Detail Vi Magazine Vi Filestrip Vi	ew
Name	Size	Modified By	Modified On		 Properties 	
170208-07.01.PDF	10 KB	FileNet Administrator	7/7/2017, 12:28 PM	^	Class:	SA General Documents
Restorative Justice-1001	8 KB	FileNet Administrator	6/27/2017, 1:27 PM		Document Title:	170208-07.01.PDF
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	L L	 System Prop 	erties
Restorative Justice-1001	8 KB	FileNet Administrator	4/6/2017, 11:26 AM			

• 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"

👱 Ce Hui Li 🗮	?	UCI
Add Document Using Entry Template		
New Folder		
 About]	

3. Choose file to add and enter document information

▼ General	
* Entry template:	Fleet Services Document Entry Template
* Save in:	General Fleet Service Documents Y
What do you want to save?	Local document Click here to choose a file from your computer
* File name:	Browse No files selected.
	✓ Major version (j)
▼ Properties	
* Class: Fleet Service Document	Enter document information
Document Title: (i)	
	~
FS Document Type: (i)	
FS Document Type: (i)	3 Click here to add a new document

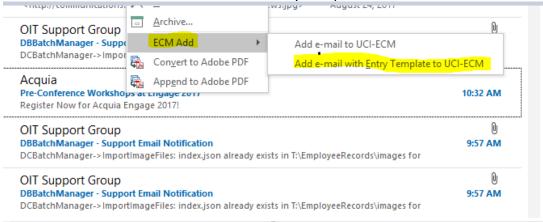
Add an Email Message via MS Outlook

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, <u>https://systems.oit.uci.edu/kfs/portal.do</u>
- 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

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File	Home	Send / Rece	ive Folde	r View	UCI-ECM	Adobe PDF	
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Login	Resou	rces					
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- 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 lis	11.	Choose	UCI from a	a "Add to	Location"	dropdown lis	st
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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.

ctive Document				▼ 3
Add to repository UCI using er	ntry template W9	~		
Location		Class W9	Major Version	
Properties				
Document Title STAPLES.pdf		Vendor Number	Vendor Name	
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, <u>https://systems.oit.uci.edu/kfs/portal.do</u>
- 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

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File	Home	Send / Receive	Folder	View	UCI-ECM	Adobe PDF	
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Login	Resourc						
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- 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

w9 form - Staples Linh Nguyen Sent: Tue 6/16/2015 12:47 To: Linh Nguyen		
	Preview Open Quick Print Save As Save All Attachments Remove Attachment Copy	
	ECM Add 🔶	Add attachment to UCI-ECM Add attachment with <u>E</u> ntry Template to UCI-ECM

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

12. Choose W9/ACH from the "Us	sing entry template"
Active Document	
Add to location * 🗻 UCI	✓ using entry template *

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

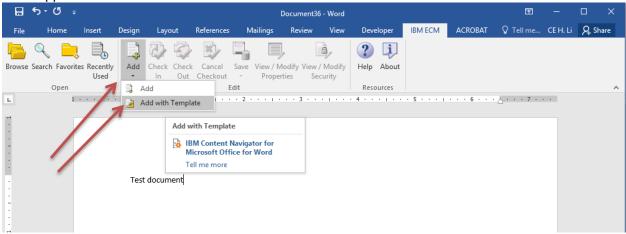
Location		Class		
🛅 W9	~	W9	Major Version	
roperties				
Document Title		Vendor Number	Vendor Name	
STAPLES.pdf				
Document Date		References		
	~			

Add New Document via MS Word

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

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	Pas	sword												
		our password?												
			Login											
			UCInetID • Need help I w recent account activi		-									
			Privacy Policy - OIT											

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



• Choose the template, then press Add

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Document Title Test document.docx	< v							Add	Cancel
	Test document		2 • • • 1 • • • 3 • •	4 .		6			Cancel

• 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

Share Document with OneDrive

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 Docum	ent with OneDrive
	o share this document with users outside of FileNet, securely, using OneDrive. ot required for you or the recipient.
Document Name:	TEST.pdf
Recipient's Email:	test@gmail.com
	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:	cel@uci.edu
Retention Period:	7 🗘
	How long the secure link will be valid for (in days).
	Share Close

A successful share will return this screen

Share Document with OneDrive	
TEST.pdf was shared successfully with cel@uci.edu They will receive an email with a secure link shortly.	
	Share Close

And an example email that will be received by the recipient

eDocs Team

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

oblems with how this message is displayed, click here to view it in a web browser.

	eDocs Team shared a file with you
cel (<u>cel@uci</u>	<u>i.edu</u>) from UC Irvine shared a file with you. This link will expire in 1 day(s).
	(TEST.pdf)TEST
	$({_{ ext{R}}})$ This link only works for the direct recipients of this message.
	Open

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Move to Deguale Din		_			
Move to Recycle Bin		i 🚽	Open		
Deleting a Document in FileNet is permanent	par f	Preview			
with no way to recover so Recycle Bin has been	Properties				
implemented to give users a chance to recove	View Child Documents				
documents. Recycled documents have a 180 or retention period in which they can be recover	Download				
Here are the steps to move to recycle bin:	eu.		Add to Favorites		
• Right-click the document you want to		Export			
move to the recycle bin		Enable Sync			
Select Move to Recycle Bin	Check Out				
Change to vocate vola de ouvroante	Check In				
Steps to restore a document:	Cancel Check Out				
• Go to the Recycle Bin which is located	Link •				
the menu at the left side of the screen	Send Email				
	 Select the document you want to restore 				
Click Restore			Folders		
			Print •		
My Recycle Bin		-	Workflow		
Refresh Delete All Delete Restore Filter: Enter	document name		Declare		
Name	Added On		Record Properties		
test.pdf	10/11/2019, 10:37 AM		Move to Recycle Bin		

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