User Manual – Content Navigator

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<tr>
<th>Revised Date</th>
<th>Description/Changes</th>
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<tr>
<td>June 21, 2018</td>
<td>A new guideline for Content Navigator</td>
<td>1.0</td>
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<td>Added Share files securely via OneDrive (p. 15)</td>
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<td>Added ‘Move to Recycle Bin’ (p. 17)</td>
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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: planleater

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

- 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:

- Properties
  - Class: Fleet Service Document

  Document Title: 
  FS Document Type: 
  Unit Number: 
  Vin Number: 

1. Click here to choose a file from your computer
2. Enter document information
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](image)

12. Choose your template from the “Using entry template” (e.g., W9)
13. Enter Document’s information and click on an Add button.
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”

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

And an example email that will be received by the recipient

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

If you have problems with how this message is displayed, click here to view it in a web browser.

---

eDocs Team shared a file with you

cel (cel@uci.edu) from UC Irvine shared a file with you. This link will expire in 1 day(s).

(TEST.pdf)TEST

This link only works for the direct recipients of this message.

Open

Privacy Statement
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.