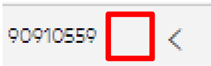
HPE Content Manager – Web Client Guide

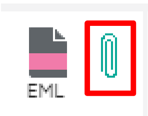
Navigate to Content of a file/folder

1. Once you have found the file you want to search within for a document, click the **dropdown arrow** at the left of the file name 

2. When the file details have expanded, click the '**Navigate to**' tab

3. Select '**Contained Records**' and the contents of that file will be displayed

Open a document

1. Once you have navigated to the document/record you want to view, click the **paper clip** attachment symbol beside the record type icon


Add notes to a record

1. Expand the record details by clicking on the **title of the record** or clicking the **dropdown arrow** to the left of the record title

2. Click on the '**Details**' tab

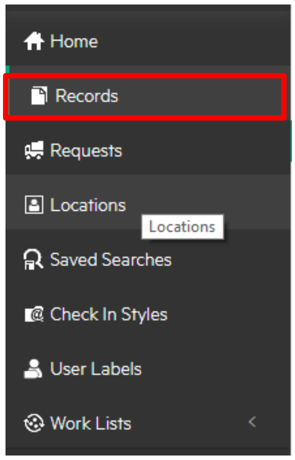
3. Select '**Notes**'

4. Enter your note in the '**Add to Notes**' box and click the green '**Add to Notes**' button

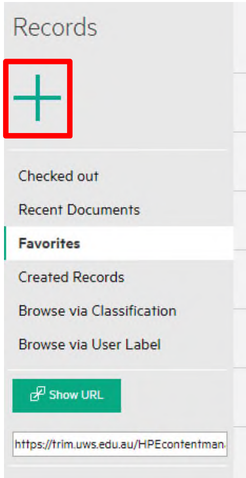
   Note: you can select whether the note will be present at the start or end of the already present list of notes (should there be any) by selecting between the two options before clicking the green '**Add to Notes**' button

Create a document/record

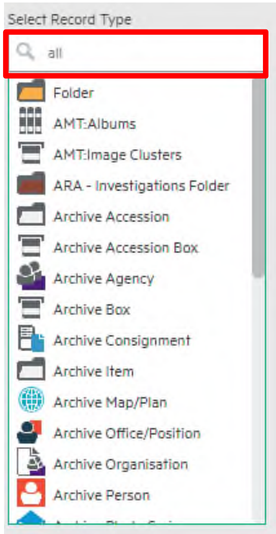
1. Select the **Records** tab on the left hand navigation menu



2. Select the **Plus** button

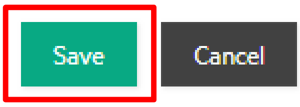


3. Type the beginning letters of the record type or scroll through the list



4. Enter the required details in the fields that have appeared:
   - Title
   - Date Created
   - Date Registered (If possible)
   - Container to which the record needs to be saved into
   - Add the document that will become the record by either clicking on the box and selecting the document or drag and drop the document into the box

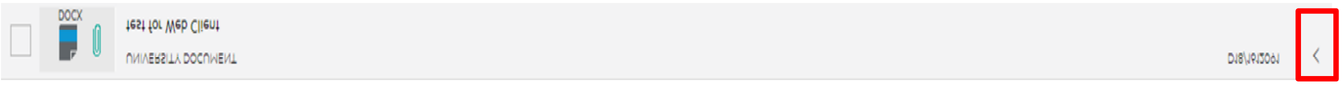
5. Click **Save**



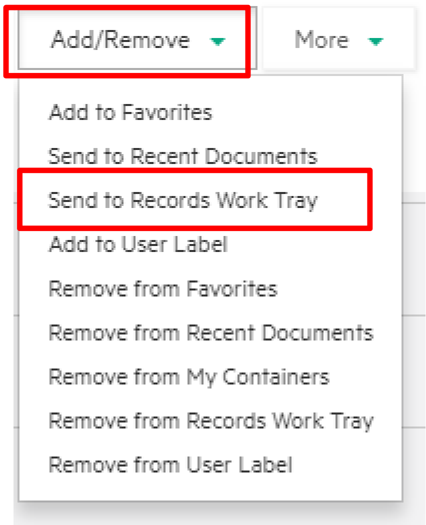
Paste into Work Tray

Once you have navigated to the record/s that you want to paste into your Work Tray

1. Click on the **drop down arrow** at the right of the record listing



2. Click the **Add/Remove drop down** tab and select '**Send to Records Work Tray**'. The record will be sent to your work tray.



(**Note:** the work tray can be located by clicking on the '**Home**' tab in the left hand navigation menu and viewing the work tray on one third of the sectioned main screen - should it have been selected in the Dashboard Configuration settings for display)

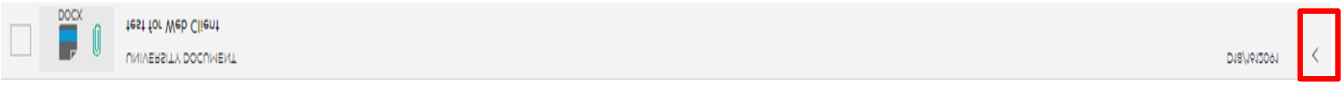
Modify properties of a folder/file

1. Navigate to the relevant folder/file
2. Click on the **file name**
3. Click on the green '**Update' button**' 

and amend the property details as required.

Modify document properties

1. Click on the **drop down arrow** at the right of the record listing



2. Click '**Update**'

3. Modify the details as required including:
    a. Title
    b. Author
    c. Addressee
    d. Date created
    e. Container/folder
    f. Whether it contains personal information, is commercial in confidence, vital record or enclosed

If you continue scrolling you will be able to select modify the records access, add notes and view the provenance of the record.

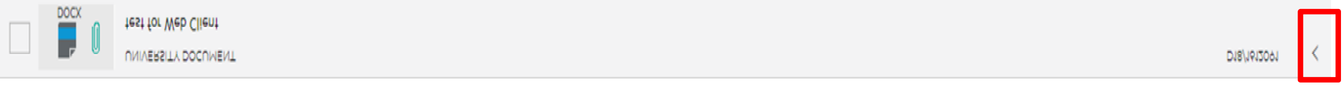
Relate a document

1. To relate a document to a file/container, navigate to the file/container and click the '**Details**' drop down
2. Select '**Add Related Records**'
3. Enter the record number of the document being related into the file and select it as it populates. Click '**Save**'

To un-relate a document:

1. Navigate to the file to which the document has been related to
2. Click on the '**Navigate to**' drop down and select '**Related Records**'

3. Click on the **drop down arrow** at the right of the record listing

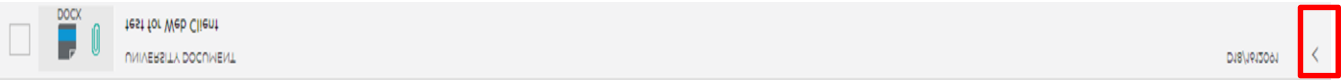


4. Click the ‘**Details**’ **drop down** and select ‘**Remove Related Records**’

5. Tick the listing with the relationship status of ‘**Related to**’ and click ‘**Remove**’

Create a new revision

1. Navigate to the record that will have the new revision created from and click the **drop down arrow** to the right of the record listing



2. Check the document out by clicking on the **red Arrow icon** 

3. Make the necessary revisions and then click the green ‘**Check in**’ **arrow** 

4. Tick the ‘**Make a new revision**’ option, add any comments as necessary and save the updated version by clicking and searching for the document or dragging and dropping it in

5. Click ‘**Check In**’

Change record metadata

1. Navigate to the specific record

2. **Tag** the record

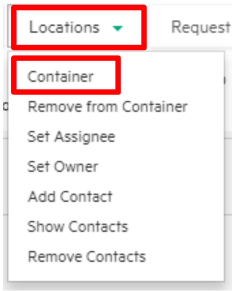
3. Click the **black double arrow** at the top right corner 

4. Click the ‘**Select properties**’ button 

5. Scroll through the list of items that you want shown in the metadata. Selected items will be highlighted in green. Click ‘**OK**’ once all desired options are selected

Change the location of a record

1. To move a document click the ‘**Locations**’ drop down and select ‘**Container**’



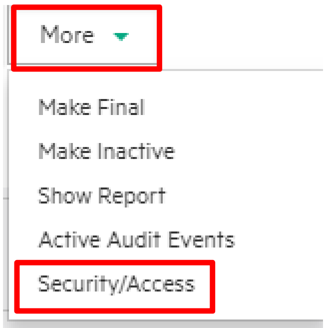
2. Enter the new container number and click ‘**Save**’. Don’t forget that if you change the location of a record then the access of that record may need to be updated at record level once it has been moved into its new location.

Change Security/Access

1. Navigate to the relevant record

2. Click on the title of the record to open the record details

3. Click on the ‘**More**’ drop down and select ‘ **Security/Access**’



4. Click the green drop down arrows and select ‘**Custom**’

Add or modify access controls

Access	Details
View Document	People in (RO Communications - Bulk Email Group)
View Metadata	People in (RO Communications - Bulk Email Group)
Update Document	People in (RO Communications - Bulk Email Group)
Update Record Metadata	People in (RO Communications - Bulk Email Group)
Modify Record Access	People in (RO Communications - Bulk Email Group)
Destroy Record	People in (RO Communications - Bulk Email Group)
Contribute Contents	People in (RO Communications - Bulk Email Group)

Public
Private
Custom
No change

5. Delete the group currently listed with access by clicking on the **small grey X**

RO Communications - Bulk Email Group ×

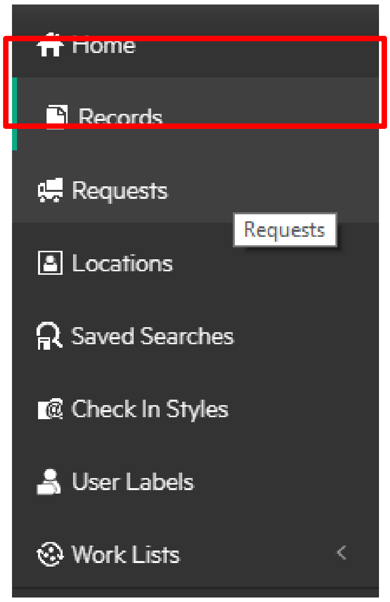
6. Begin typing the name of the group/position that requires access to that document based on the requirements and container access and select the group as the list populates to the closest match (ensuring that it is an internal location)

7. Click ‘**Save**’. Do this for all access points of the record and when complete, click ‘**Save**’ at the higher level to set all changes

Create a folder/file

(note – Student Files doesn’t seem to be an option for creation, unless this option is to do with user access)

1. In the **Records tab** in the left hand navigation menu



Click on the **Plus button** 

2. Select the relevant folder type required and enter the details

3. Click ‘**Save**’

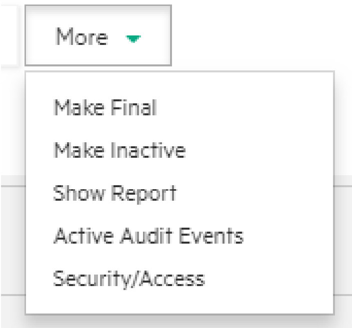
Print Folder Labels

1. Navigate to the relevant folder/file

2. **Tick the folder**

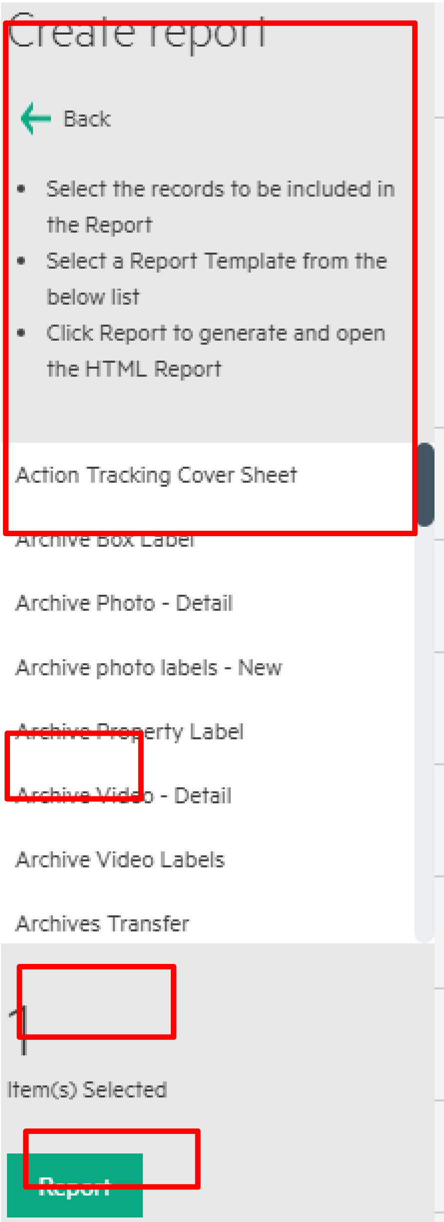
3. Open the folder details by clicking on the title

4. Click the ‘**More**’ drop down option and select ‘**Show Report**’



5. In the grey left hand navigation menu under the title ‘**Create report**’ select the relevant report template from the available list (**Note:** scroll to see more template options)

6. Click the green ‘**Report**’ button



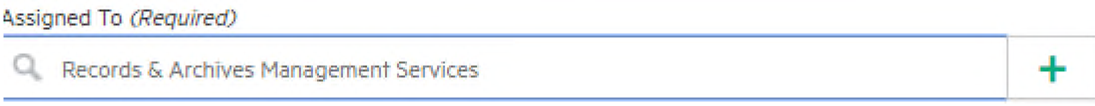
Modify 'Assign to' of folder/file

1. Navigate to the relevant folder

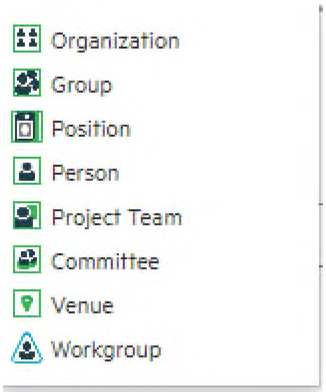
2. **Click the folder title**

3. Click the **green 'Update' button**

4. Click into the '**Assigned To (Required)**' field and then click onto the **Plus button** that appears beside this field



5. Select the relevant location type from the available list



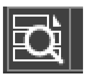
6. Fill in the sections: Details, Physical Address, Security/Access, Notes and Governance as required and click the **green 'Save' button. Note:** scroll to find all sections as the initial fields displayed relate only to the 'Details' section.

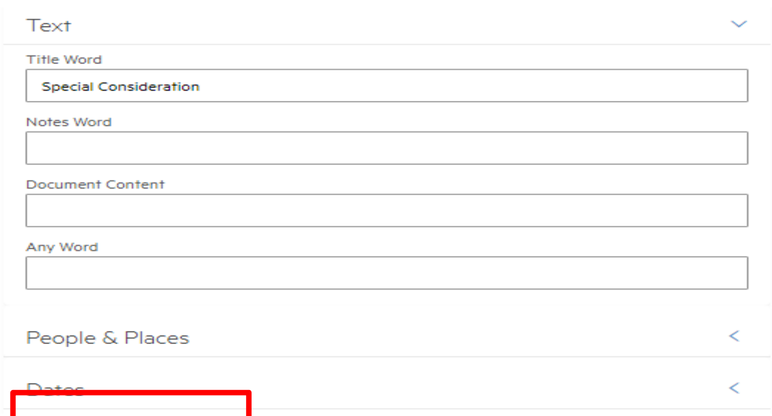
Search by title

To search by title either

1. Enter the title in the search bar at the top of the Web Client window ensuring that the selected search type is '**Record**' and click the **green search icon/ press enter on the keyboard**

OR

2. Click the '**Open Form Search**' button  and fill in the '**Title Word**'. If necessary you may need to open the '**Dates**' **section** to include date created and registered as part of your constructed search



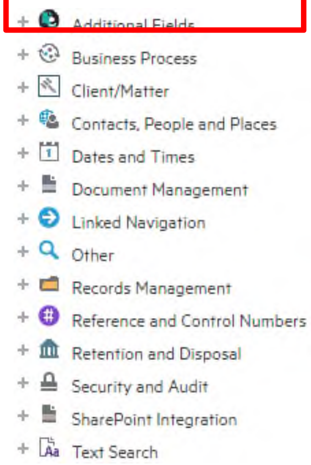
3. Click the **green 'Search' button**

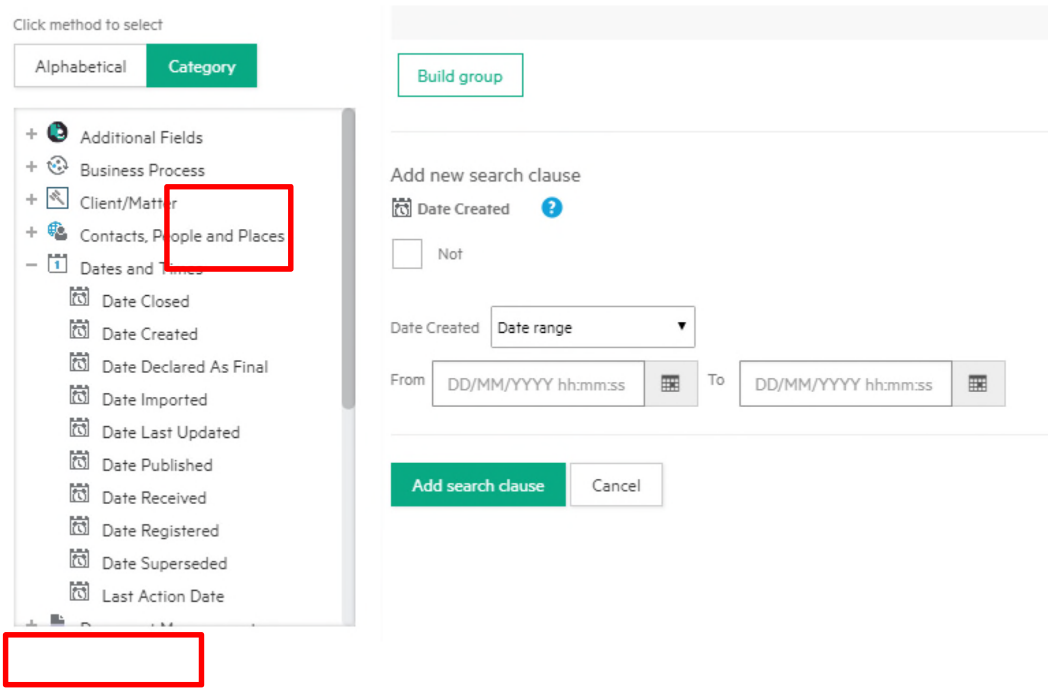
Build a Search Query

1. Click the '**Search Editor' button** 

2. Make sure that the '**Build Search Query' tab** is selected

3. Select the fields that you require in your search query from the method list. **Note:** scroll to see more search methods to select from. Once you have drilled down to the method of choice enter the required details and click '**Add search clause**'



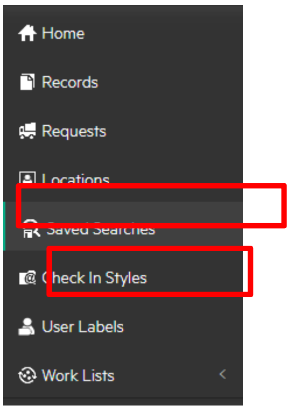


4. Once all search clauses have been added, click the **green 'Search' button**

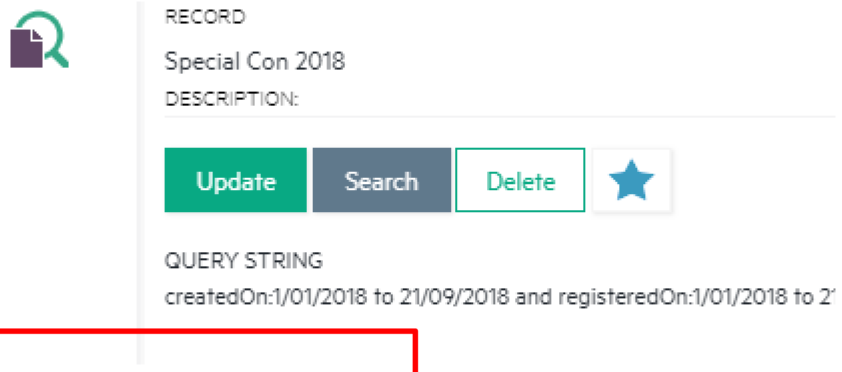
5. ## Save a Search

1. Once you have built or conducted a search and the results have been displayed, click the **'Save' button** at the top of the screen beside the quick search bar

2. Enter a search name for your own reference and tick the **'Add to Favourites' box**, then click **'Save'**. The saved search will appear in your list of saved searches when you click on the **'Saved Searches'** option in the black left hand navigation menu.

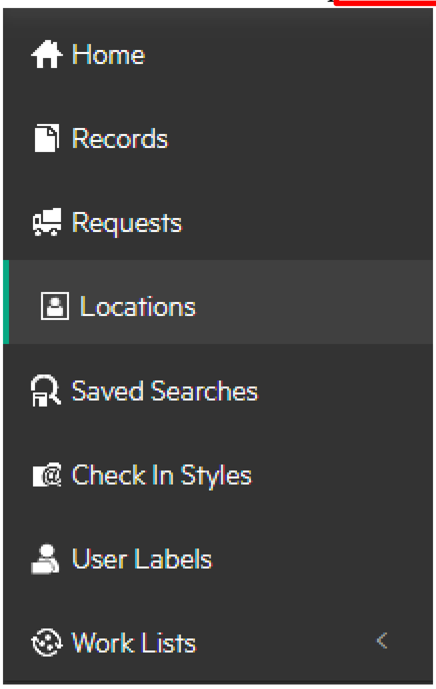


3. Once in the **'Saved Searches'** menu, simply click on the title of the search you want to rerun and then click the **grey 'Search' button**



Create a Location

1. Click on the **'Locations'** option in the black left hand navigation menu



2. Click the **green plus button**

3. Fill in the details as necessary within the six categories:
    a. Person
    b. Details
    c. Physical Address
    d. Security/Access
    e. Notes
    f. Governance

Note: be sure to indicate if the location is internal by ticking the internal option within the Details section

4. Click **'Save'**

Add/Remove Options

To send or remove an individual record to one of the available options:

1. From the displayed list of records**, click the record that is to be to added or removed**

2. Click **Add/Remove** and then click the **menu option to be applied** to the record.

The record will be added or removed accordingly.

To send or remove multiple records to one of the available options:

1. From the displayed list of records, **tag the records that are to be added or removed**

2. On the **Records** panel, click **Send to** or **Remove from** and then click the menu option that is to be applied to the selected records.

The selected records will be added or removed accordingly.

Note: If you select to add or remove record(s) to **User Labels**, you will first need to select the **User Label** from a displayed list and then click **Save**.

Add/Remove menu options

- **Add to Favourites** - adds the record(s) to your list of Favourite records. Your list of **Favourite records** can be added as a dashboard item for easy access to this list. See Dashboard Configuration for details.

- **Send to Recent Documents** - adds the record(s) to your list of Recent Documents. Your list of **Recent Documents** can be added as a dashboard item for easy access to this list. See Dashboard Configuration for details.

- **Send to Containers** - adds the record(s) to your list of Containers. Your list of **Recent Containers** can be added as a dashboard item for easy access to this list. See Dashboard Configuration for details.

- **Send to Records Work Tray** - adds the record(s) to your Work Tray. Your **Records Work Tray** can be added as a dashboard item for easy access to this list. See Dashboard Configuration for details.

- **Add to User Label** - adds the selected record(s) to a User Label.

- **Add to Check In Style** - opens the Check In Style panel to enable easy creation of a Check In Style based on the selected record.

- **Remove from Favourites** - removes the record(s) from your list of Favourite records.

- **Remove from Recent Documents** - removes the record(s) from your list of Recent Documents.

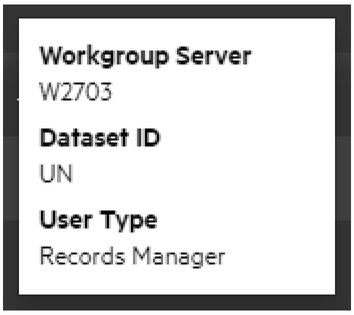
- **Remove from My Containers** - removes the record(s) from your list of Containers.

- **Remove from Records Work Tray** - removes the record(s) from your Work Tray.

- **Remove from User Label** - removes the record(s) from a User Label.

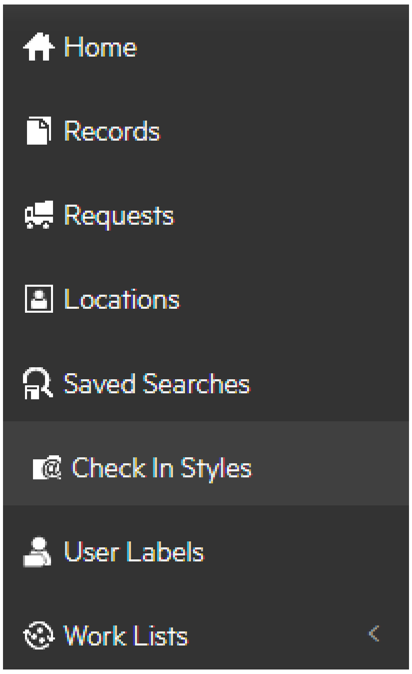
Find the Workgroup Server, Dataset ID and User Type details

1. Once you have logged into Web Client you will see your name in the black left hand navigation panel. The small **green dropdown arrow** beside your name will reveal the Workgroup Server, Dataset ID and User Type details



Creating Check-In Styles

1. Click the **'Check in Styles'** option in the black left hand navigation menu



2. Click the **green plus button** 

3. Fill in the details as required within the General, Defaults and Processing sections

4. Click the green **'Save'** button

Create a 'To Do item'

1. Click on the **'Work Lists'** option in the black left hand navigation menu

2. Select **'To Do Items'**

3. Click the **green plus button** 

4. Enter the relevant details

5. Tick the **'Notify By Email'** option for email updates and reminders

6. Click the green **'Save'** button