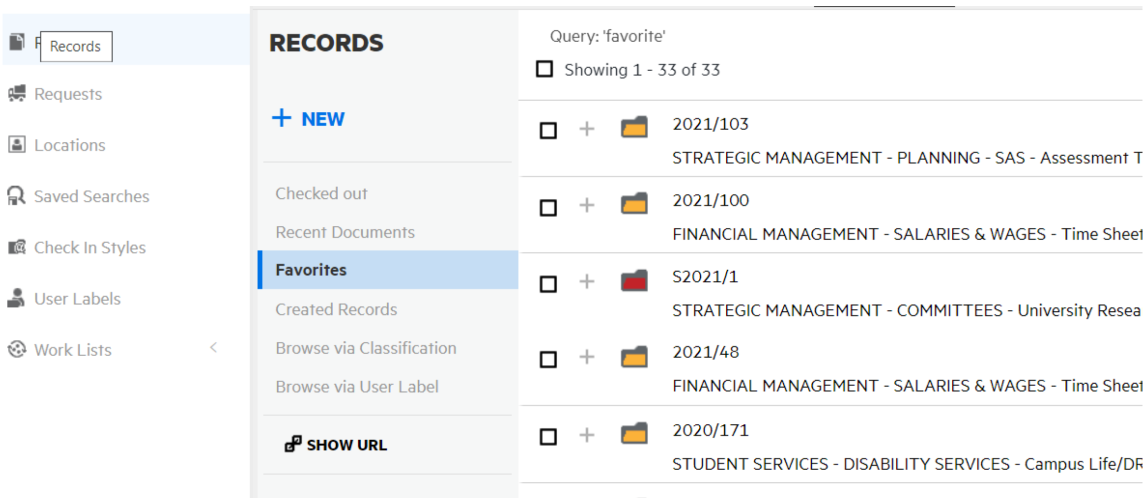
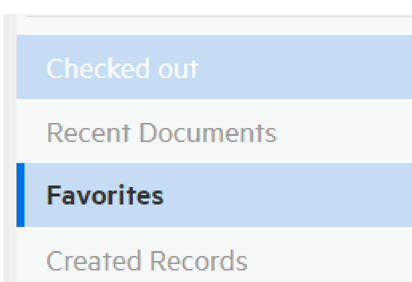
Creating and Working with Records in CM Web Client

How to Save Documents on CM Web Client

To create new records or to access your records go to the Records Tab on the left hand side of the Screen ,here you will find options to create records, and access records that are recently created, are in your favorites or are records that are checked out to you.



Details of the Icons

Icons	Function
	To create a new record ,click on this plus sign
	**Checked out** – contains records that has been checked out for editing by you **Recent Records** – contains records that has been recently saved or modified by you. **Favorites** – records that are frequently accessed can be added here. **Created Records** – records created by you will be displayed here

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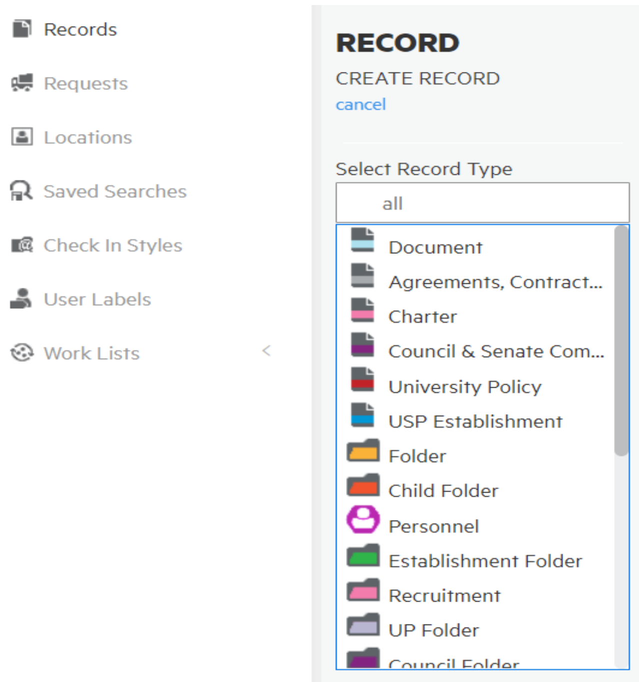
Creating New Records

To create a new Record:

1. On the Navigation menu, click **Record**. The Records panel will be displayed.

2. From the **Records** panel, click **Create New record(+)**; or On the Keyboard, press CTRL + ALT + c



3. Select a Record Type from the displayed list of Record Types. If the Record Type is not listed, type in the name of the Record Type and then select it from the displayed list. To move through the list of Record Types, you can press the **DOWN** or **UP** arrow keys on the keyboard and press **Enter** to confirm the selection.

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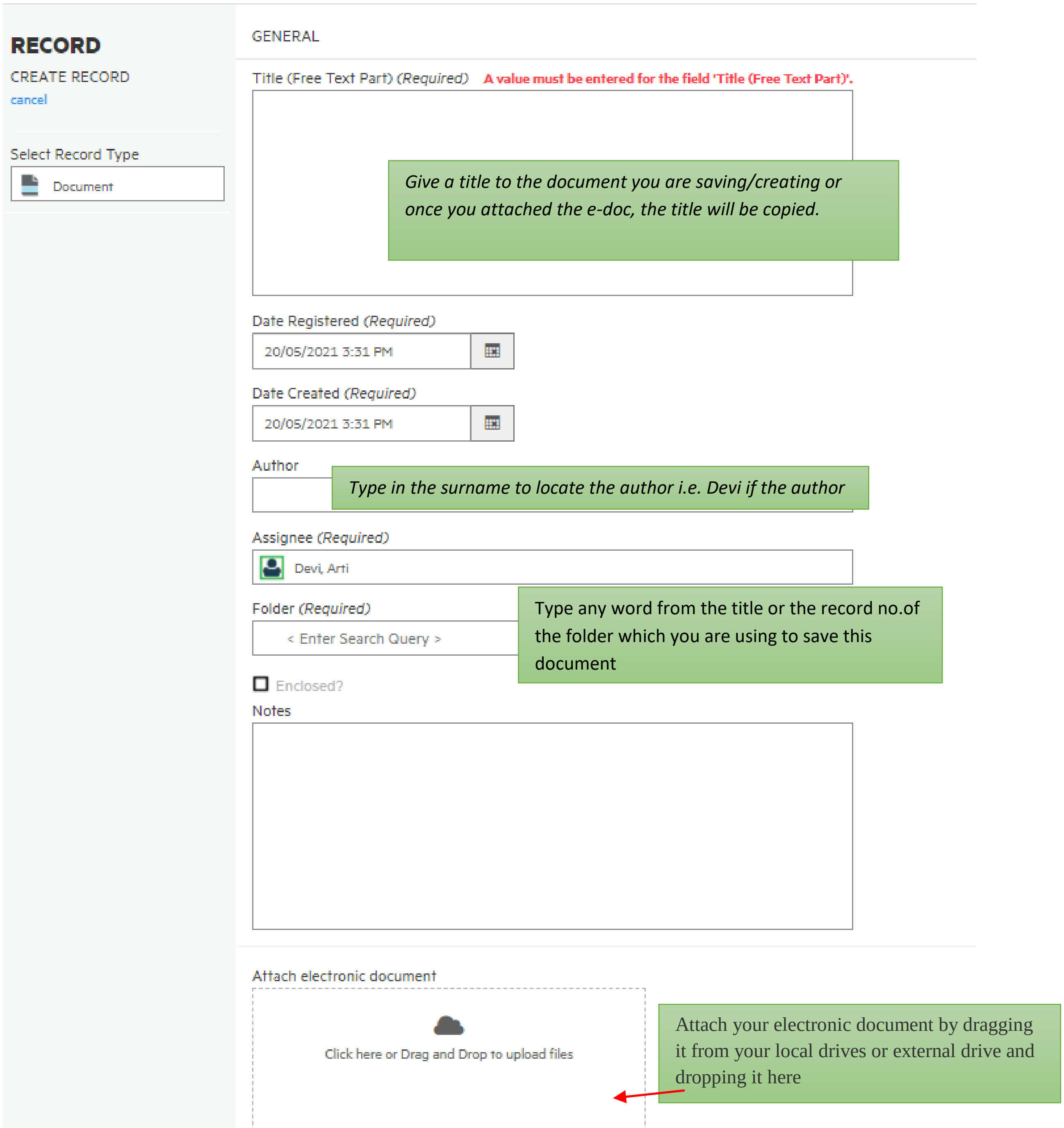
The Record Entry form will be displayed. This form will look different depending on what Record Type you are creating. To expand or collapse a section, click the drop-down arrow.



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4. Complete the Record Entry form fields,

5. Click **Save**.

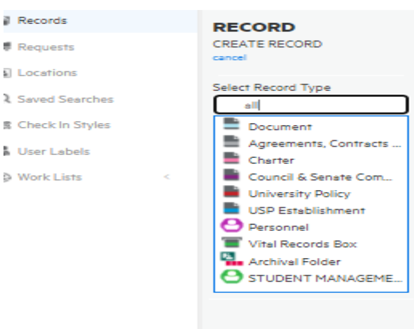
*The newly created Record will be added to the user's **Created Records** tray on the Records panel.*

Drag and Drop Option on Web Client

An alternative method of creating a new record with an electronic document attached is to drag and drop an electronic document onto the Content Manager Web Client. This process will automatically attach the electronic document to the record entry form, without having to navigate or drag and drop the document onto the **Attach electronic document** field.

1. Select the electronic document that is to be attached to the new Record.

2. Drag and drop the electronic document from the local/external drives to any Content Manager panel.



The **Create Record** panel will be displayed.

3. Select the required **Record Type** from the drop-down list.

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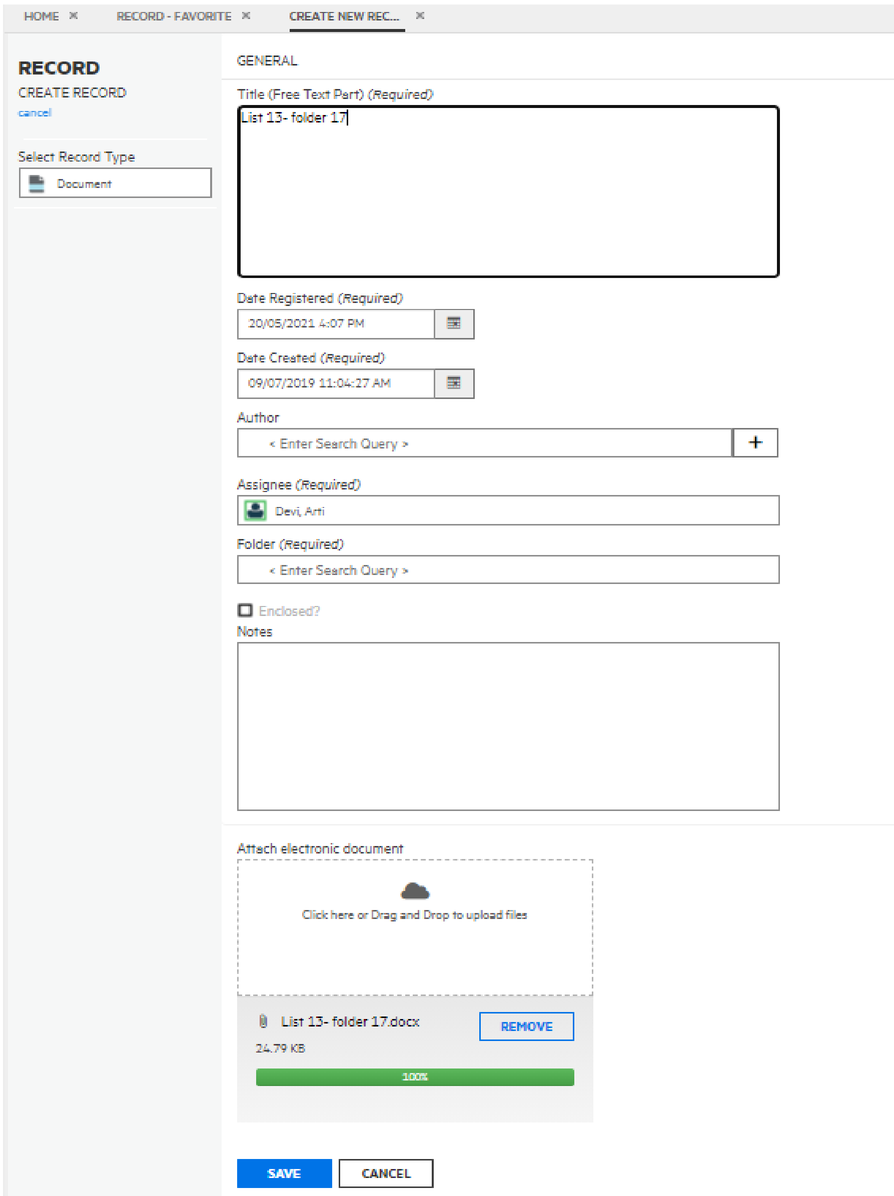
The Record entry form will be displayed, with the Title field displaying the electronic document's file name, and the Date Created field populated with the electronic document's created date details.



5. Complete the Record entry form fields as required,
6. Click **Save**.

*The newly created Record will be added to the user's **Created Records** tray on the Records panel.*

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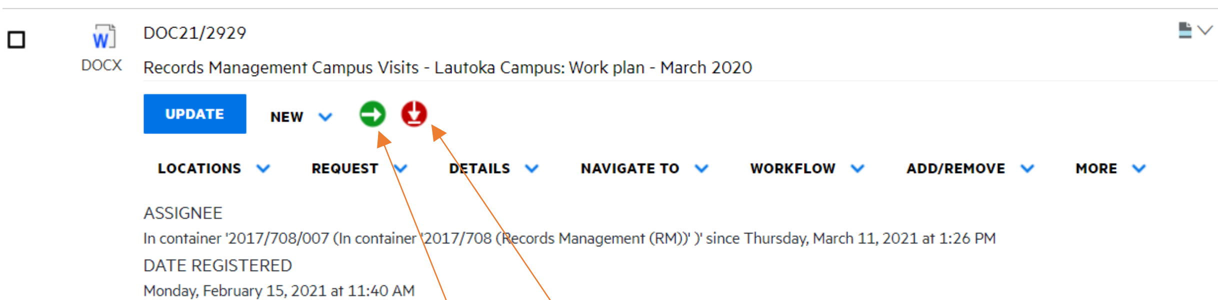
Editing/updating your documents on Web Client

The Search Result item list displays a summary of the list of records. Each record is displayed with its:

- Record Type
- Record Number
- Title

To display further information about the record (Assignee and Date Registered), edit or complete actions on an individual record, click on the record.

The record expands to display additional information about the record, as well as task buttons as shown below:



Available Tasks

The task buttons available for a record is dependent on the type of record selected. For example, a record that has an electronic document attached can be Checked Out; if a Document is in a Folder, a user can navigate to its Folder.

Update

To update the record's title, click **Update**.

New

To create a new version/part of a document from an existing record.

Electronic Documents

Allows you to work on electronic documents by Checking in and checking in.

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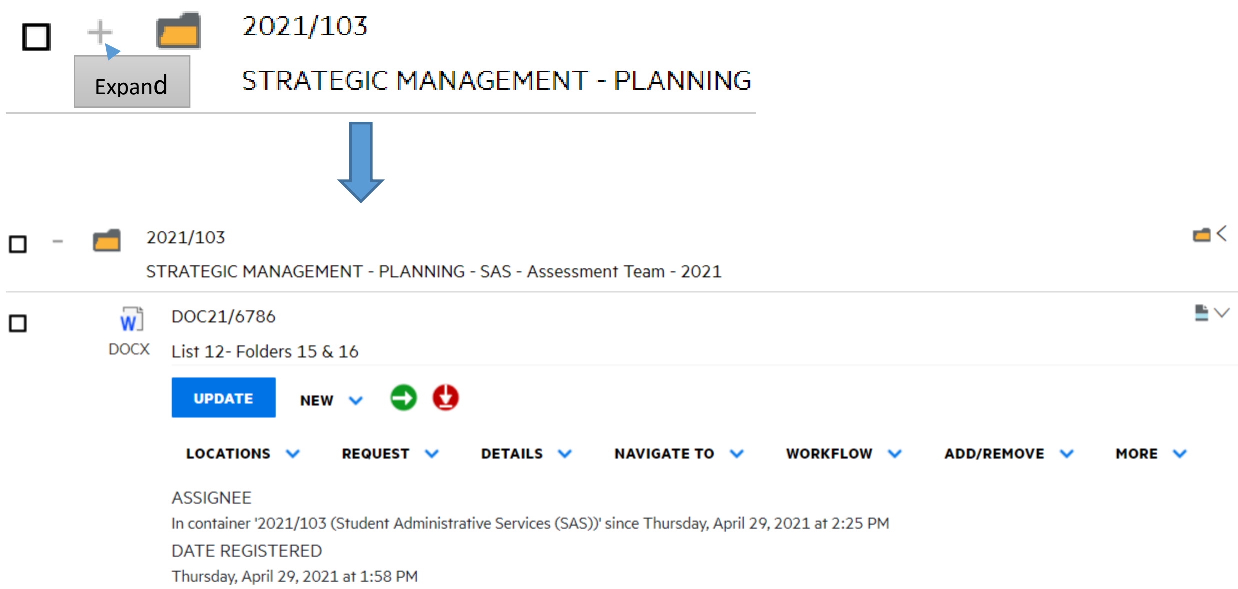
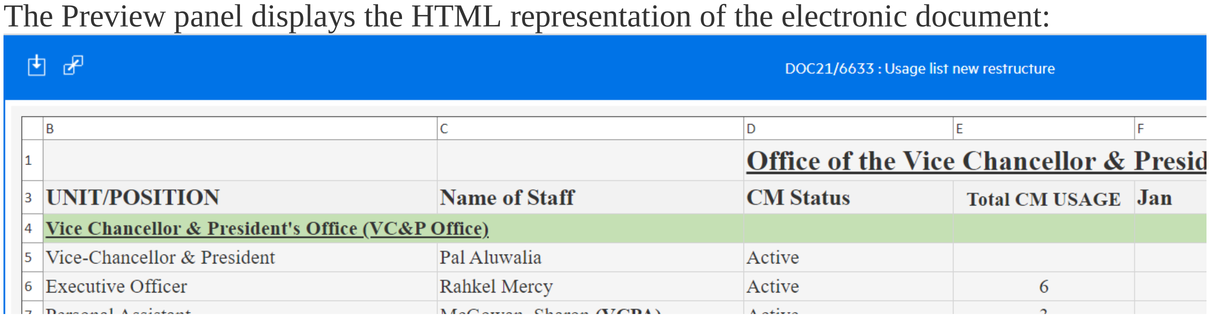
Viewing an electronic document

If a Content Manager Folder has an electronic document attached, click on (+) to expand the folder to view the electronic records:

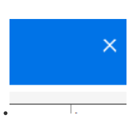


To view the electronic document:

- On the selected record, click the document icon.
- The Preview panel displays the HTML representation of the electronic document:



To go back to the list of Search results, click **Close** on the document **View** dialog:



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Downloading an electronic document

To save a copy of the attached electronic document to a device:

1. On the selected record, click the document icon.
2. On the **View** action panel, click **Download**

Depending on your browser, you may be prompted to select from saving or opening the document, or the electronic document will automatically download to your default Downloads folder.

Generating a URL Link

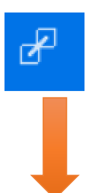
The Generate URL Link option allows you to generate and share an URL to a particular record. This is particularly useful as it means that you do not have to download a document and share it across the network, you can generate a Content Manager Web Client URL and share the link instead.

If this option has been disabled, you will not see the **Generate URL link** option on the **Preview** panel.

To generate a URL link:

1. On the selected record, click the document icon

2. On the **Preview** panel, click **Generate URL link**



https://usprm.usp.ac.fj/ContentManager/ServiceApi/Record/671407/File/Document

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Record Revisions

Content Manager enables you to create multiple revisions of an electronic document.

Viewing a Revision

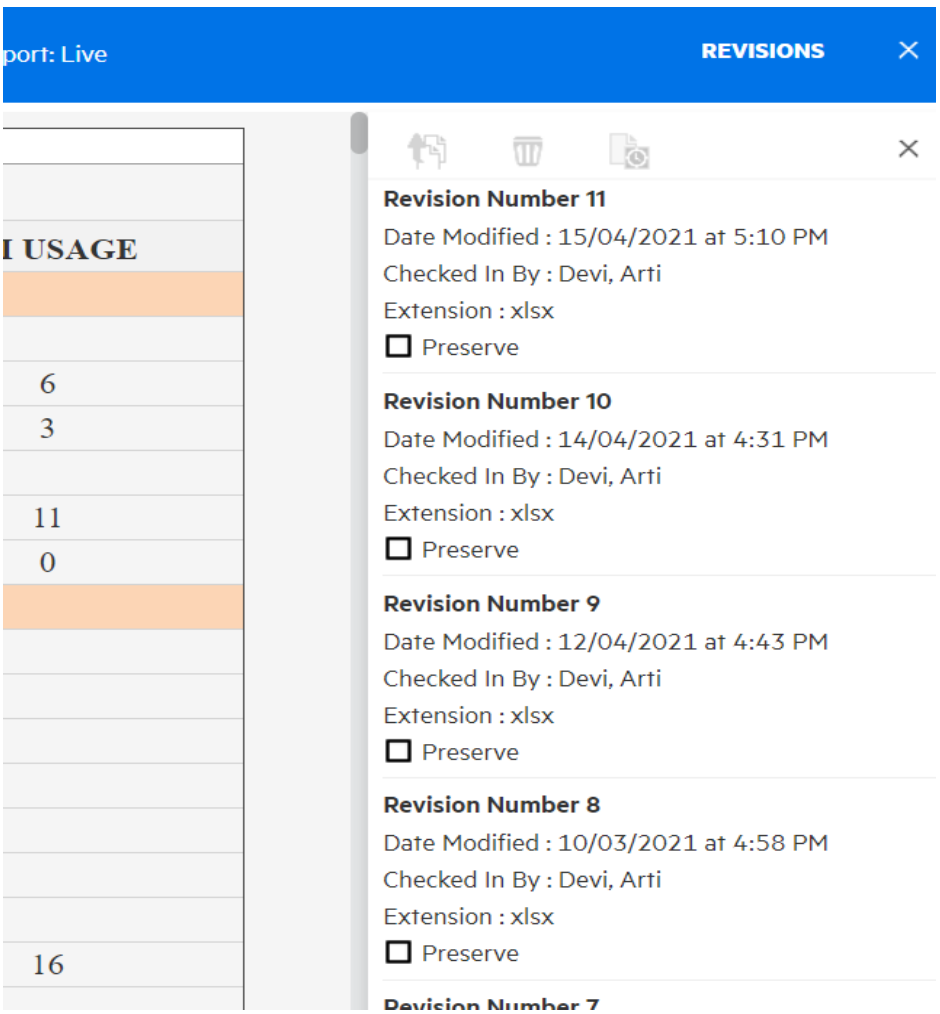
To view a record's Revisions:

1. On the selected record, click the document icon.

The Preview panel displays the HTML representation of the electronic document.

2. On the Preview panel, click **Revisions**.

The Revisions panel will open, displaying all Revisions associated with the record:



Creating and Working with Records in CM Web Client

1. On the list of Revisions, click the Revision you want to view.

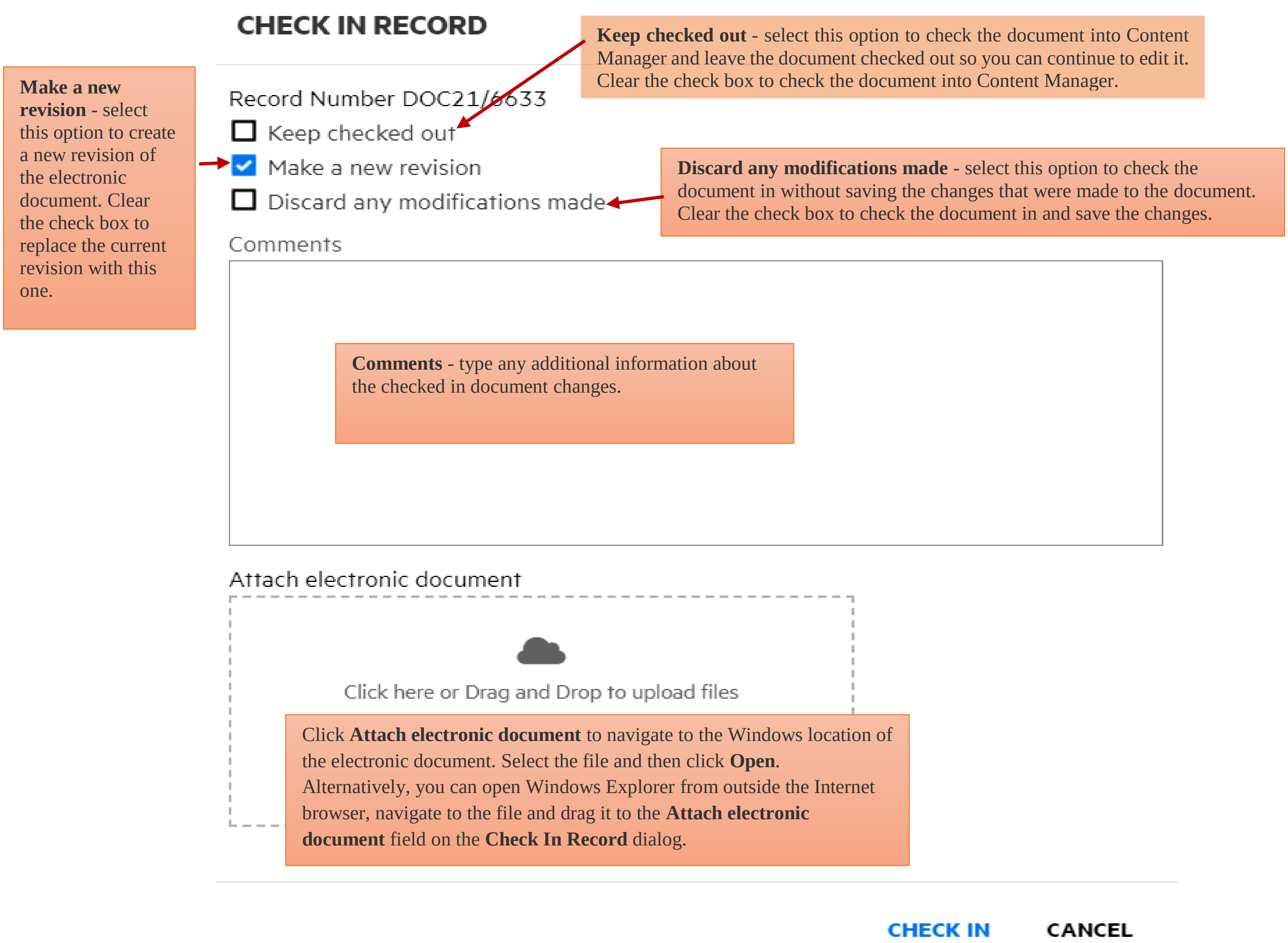
The Preview panel will update and display the content of the selected Revision.

To update the Preview panel with the current Revision, click **Show the current Revision**

Check In

To check in an electronic document:

1. On the selected record, click **Check In** 
2. The **Check in Record** dialog appears: Select the required **Check In Record** options:



NOTE: if you are checking in documents on behalf of another user, the **Discard any modifications made** option is selected by default and cannot be changed.

3. Click **Check In**.

Check Out

Users have the ability to check out an electronic document to their local disk to allow them to edit the document from there.

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To check out an electronic document:

1. On the selected record, click **Check Out**

NOTE: Content Manager Web Client does not 'remember' where the document has been saved, it's important to take note where you've saved checked out documents so you can navigate to the correct document for Check In.

Check Out and Edit options

The Web Client allows you to edit electronic records directly in the relevant authoring application. Depending on how your organization has set up the Web Client environment and the authoring application environment, you may see different behaviours when you opt to us the **Check out and edit** option.

The document being edited may open:

- in an installed version of the authoring application,

Checking out and Edit using an installed authoring applications

NOTE: this option is only available when accessing the Web Client via a supported Internet Explorer or Edge browser.

To check out and edit an electronic document:

- On the selected record, click **Check out and edit**, the document will open in its authoring application

NOTE: a warning may be displayed before the document is opened in its authoring application, click **OK** on the warning dialog to open the file.

- Make the required changes to the opened document. Once all changes have been made, from the **File** tab, click **Save**. Alternatively, click **Save** in the Quick Access Toolbar.
- Close the authoring application.

The document can be checked in at this point, or it can be left checked out so further updates can be made.

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Where can you easily locate your Checked Out Documents/Records

- On the Home Page →Records →On the displayed Records Panel →Click Checked Out Records, and a list of all the records that you have checked out of CM will be displayed.
- The **Documents Checked Out** dashboard on the **Home** page (if you have this selected on your Homepage), →select the record to be checked back in from this list.

To check the document back into Content Manager:

- If you return to the same Web Client instance and the relevant record tab is still open, click **Check In**. The **Check in Record** dialog will open.
- Select the required **Check In Record** options, and then click **Check In**.