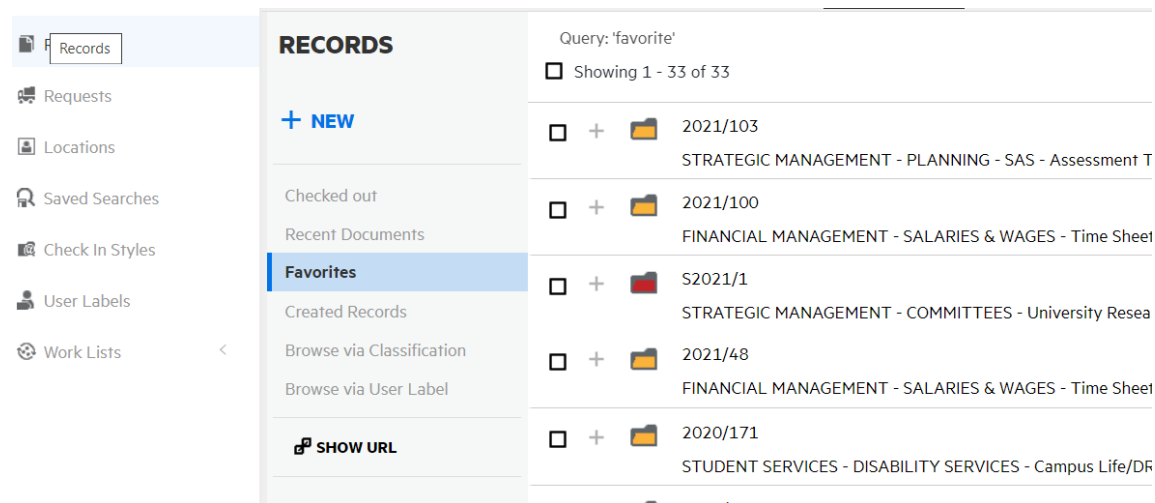




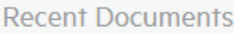
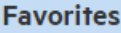

Creating and Working with Records in CM Web Client

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

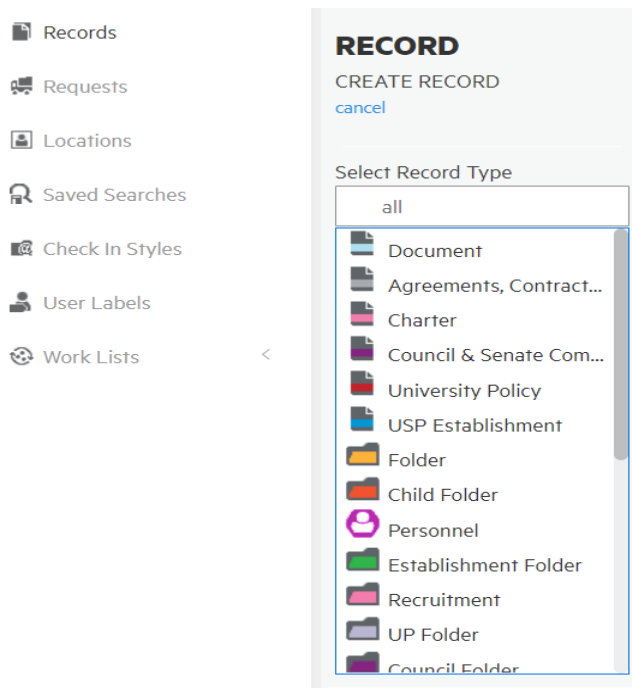
Icons	Function
 NEW	To create a new record ,click on this plus sign
   	<p>Checked out – contains records that has been checked out for editing by you</p> <p>Recent Records – contains records that has been recently saved or modified by you.</p> <p>Favorites – records that are frequently accessed can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

Creating and Working with Records in CM Web Client

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.

RECORD

CREATE RECORD

[cancel](#)

Select Record Type

 Document

GENERAL

Title (Free Text Part) (Required) A value must be entered for the field 'Title (Free Text Part)'.

Give a title to the document you are saving/creating or once you attached the e-doc, the title will be copied.

Date Registered (Required)

20/05/2021 3:31 PM


Date Created (Required)

20/05/2021 3:31 PM

Author

Type in the surname to locate the author i.e. Devi if the author

Assignee (Required)

 Devi, Arti

Folder (Required)


[< Enter Search Query >](#)

Type any word from the title or the record no. of the folder which you are using to save this document

☐ Enclosed?

Notes

Attach electronic document



Click here or Drag and Drop to upload files

Attach your electronic document by dragging it from your local drives or external drive and dropping it here

Creating and Working with Records in CM Web Client

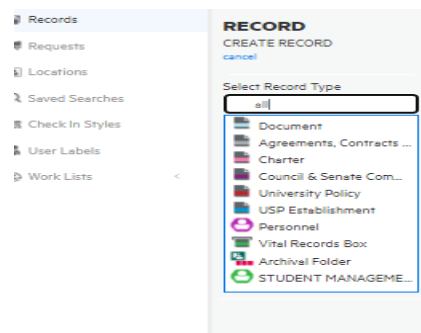
4. Complete the Record Entry form fields,
5. Click **Save**.

*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.

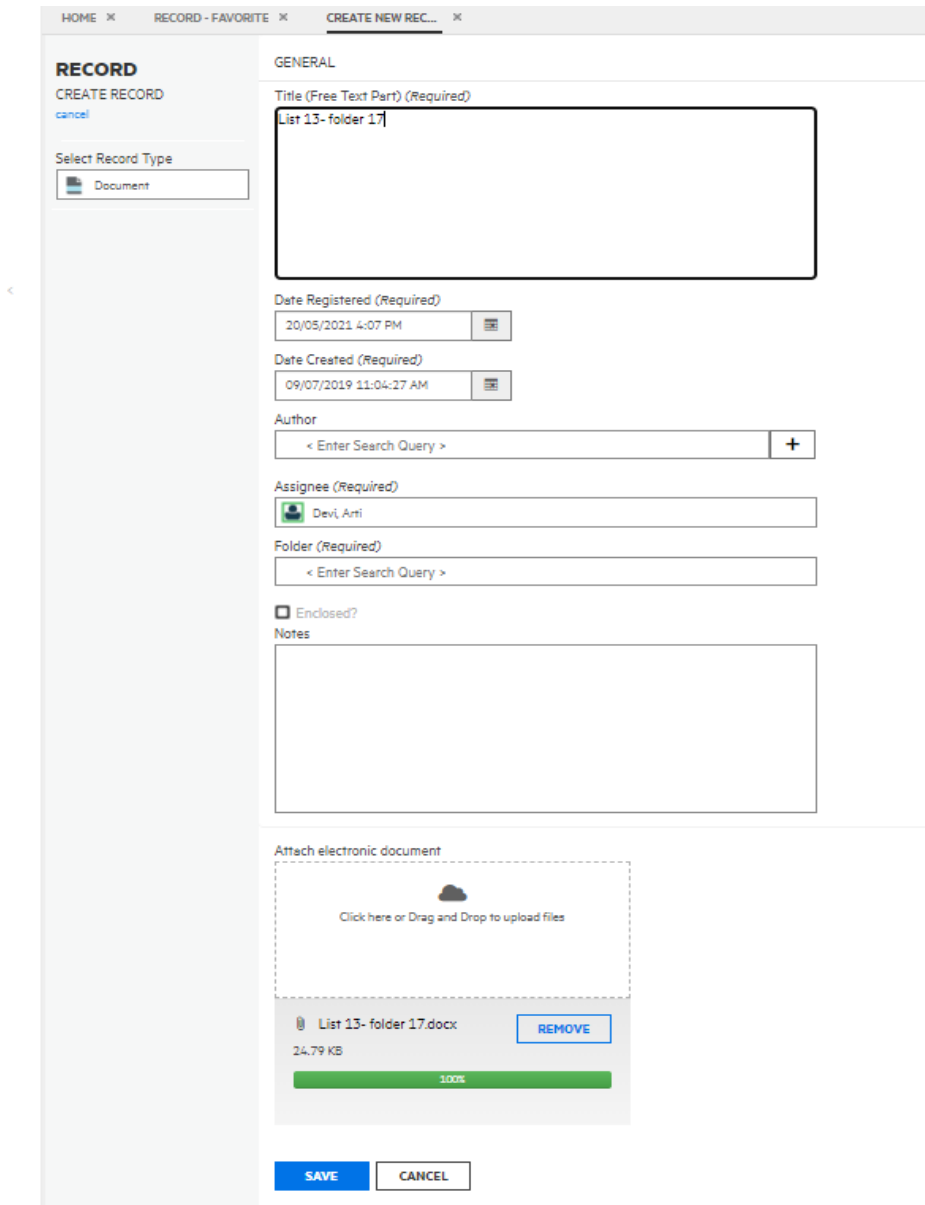


The **Create Record** panel will be displayed.

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

Creating and Working with Records in CM Web Client

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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Creating and Working with Records in CM Web Client

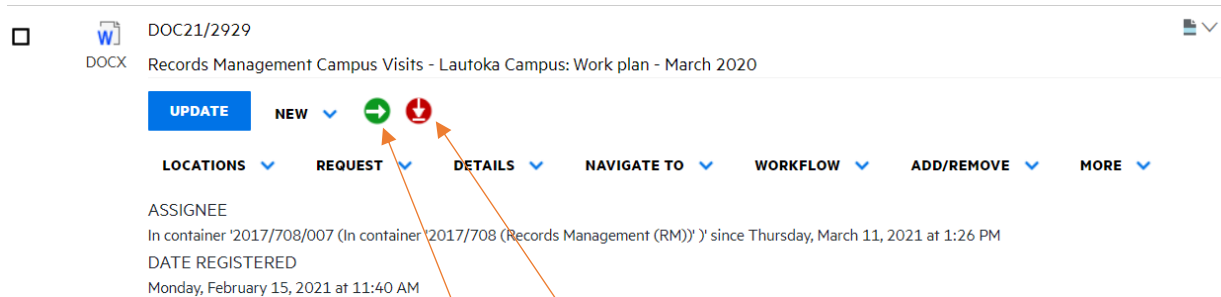
Editing/updating your documents on Web Client

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:



The screenshot shows a record entry for 'DOC21/2929' with the title 'Records Management Campus Visits - Lautoka Campus: Work plan - March 2020'. Below the title, there are several task buttons: 'UPDATE' (blue), 'NEW' (blue with a dropdown arrow), a green circular arrow icon, and a red circular arrow icon. Below these buttons are several menu items: 'LOCATIONS', 'REQUEST', 'DETAILS', 'NAVIGATE TO', 'WORKFLOW', 'ADD/REMOVE', and 'MORE', each with a dropdown arrow. Further down, the 'ASSIGNEE' section shows 'In container '2017/708/007 (In container '2017/708 (Records Management (RM))' since Thursday, March 11, 2021 at 1:26 PM'. The 'DATE REGISTERED' section shows 'Monday, February 15, 2021 at 11:40 AM'. Two orange arrows point from the text 'Checking in and checking in' in the 'Electronic Documents' section to the green and red circular arrow icons.

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.

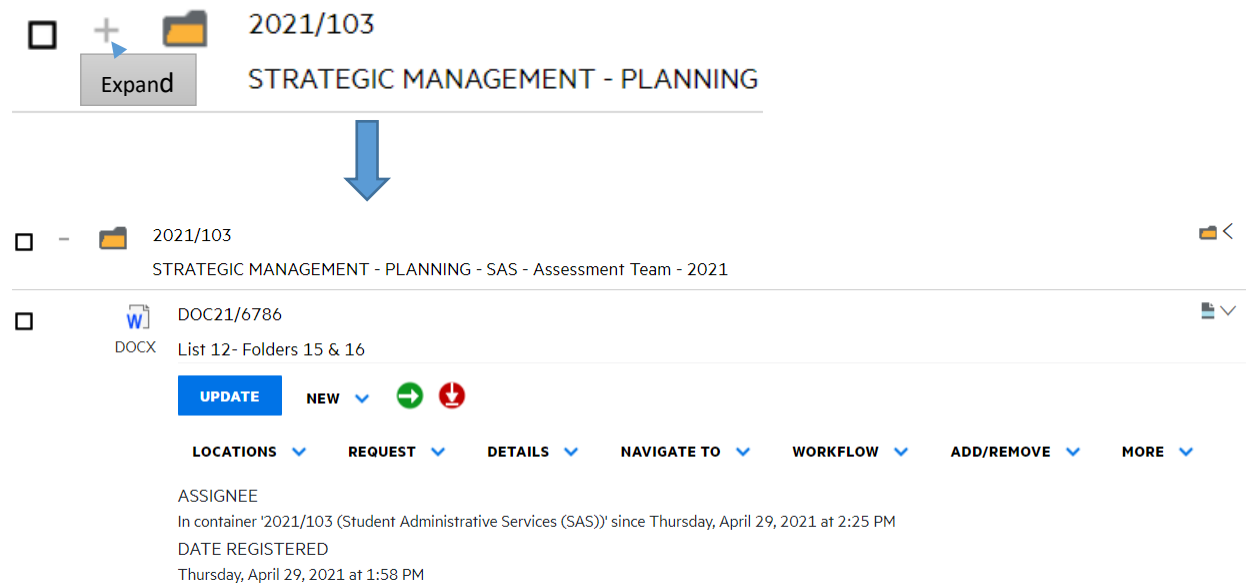
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Creating and Working with Records in CM Web Client

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:



The screenshot shows the CM Web Client interface. At the top, a folder named '2021/103' is expanded, revealing 'STRATEGIC MANAGEMENT - PLANNING'. Below this, a document icon is clicked, leading to a detailed view of 'DOC21/6786'. The document is titled 'List 12- Folders 15 & 16'. The interface includes a navigation bar with buttons for 'UPDATE', 'NEW', and various dropdown menus for 'LOCATIONS', 'REQUEST', 'DETAILS', 'NAVIGATE TO', 'WORKFLOW', 'ADD/REMOVE', and 'MORE'. The document details section shows the assignee as 'In container '2021/103 (Student Administrative Services (SAS))' since Thursday, April 29, 2021 at 2:25 PM' and the date registered as 'Thursday, April 29, 2021 at 1:58 PM'.

To view the electronic document:

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

DOC21/6633 : Usage list new restructure					
	B	C	D	E	F
1			Office of the Vice Chancellor & President		
3	UNIT/POSITION	Name of Staff	CM Status	Total CM USAGE	Jan
4	Vice Chancellor & President's Office (VC&P Office)				
5	Vice-Chancellor & President	Pal Aluwalia	Active		
6	Executive Officer	Rahkel Mercy	Active	6	
7	Personal Assistant	McGowan, Sharon (MCOWAN)	Active	2	

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



Creating and Working with Records in CM Web Client

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>

Creating and Working with Records in CM Web Client

Record Revisions

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

Viewing a Revision

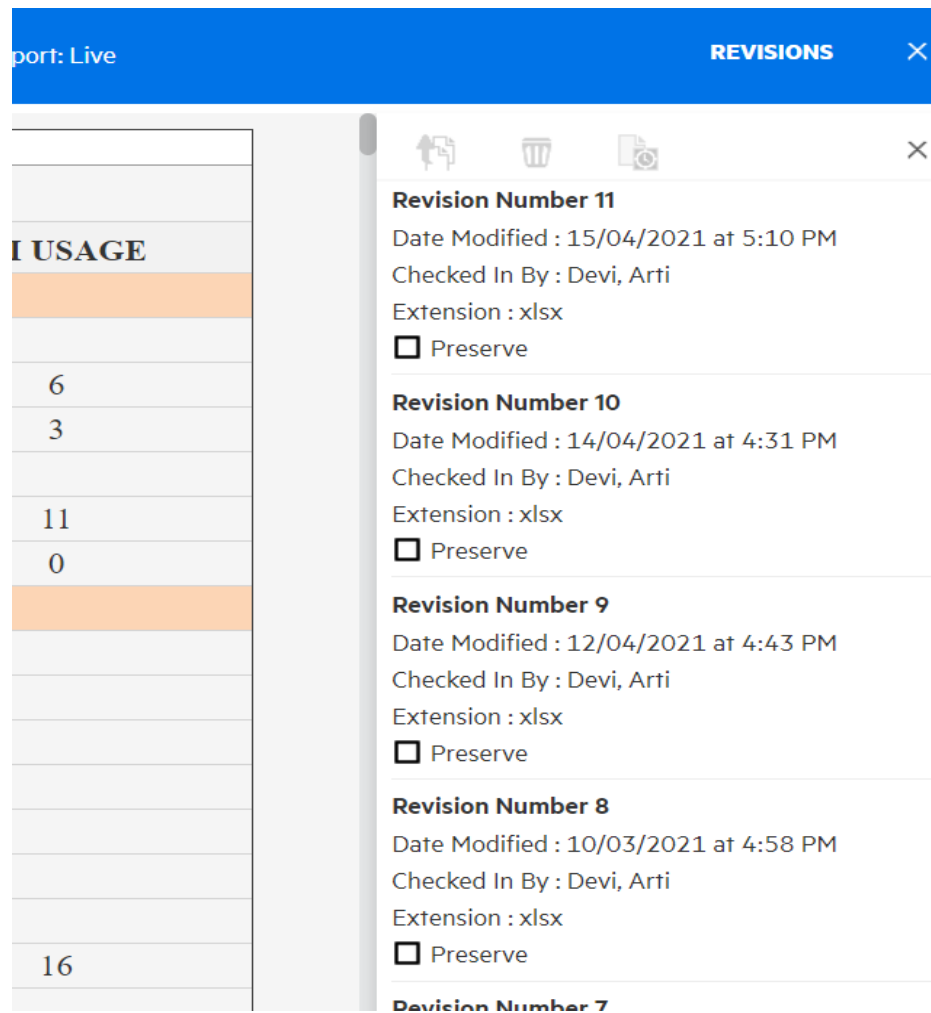
To view a record's Revisions:

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:



Revision Number	Date Modified	Checked In By	Extension	Preserve
Revision Number 11	15/04/2021 at 5:10 PM	Devi, Arti	xlsx	<input type="checkbox"/>
Revision Number 10	14/04/2021 at 4:31 PM	Devi, Arti	xlsx	<input type="checkbox"/>
Revision Number 9	12/04/2021 at 4:43 PM	Devi, Arti	xlsx	<input type="checkbox"/>
Revision Number 8	10/03/2021 at 4:58 PM	Devi, Arti	xlsx	<input type="checkbox"/>
Revision Number 7				

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:

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CHECK IN RECORD

Make a new revision - select this option to create a new revision of the electronic document. Clear the check box to check the document into Content Manager and leave the document checked out so you can continue to edit it. Clear the check box to check the document into Content Manager.

Record Number DOC21/6633

- ☐ Keep checked out
- ☒ Make a new revision
- ☐ Discard any modifications made

Keep checked out - select this option to check the document into Content Manager and leave the document checked out so you can continue to edit it. Clear the check box to check the document into Content Manager.

Discard any modifications made - select this option to check the document in without saving the changes that were made to the document. Clear the check box to check the document in and save the changes.

Comments

Comments - type any additional information about the checked in document changes.

Attach electronic document



Click here or Drag and Drop to upload files

Click **Attach electronic document** to navigate to the Windows location of the electronic document. Select the file and then click **Open**. Alternatively, you can open Windows Explorer from outside the Internet browser, navigate to the file and drag it to the **Attach electronic document** field on the **Check In Record** dialog.

CHECK IN

CANCEL

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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Creating and Working with Records in CM Web Client

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 use 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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Creating and Working with Records in CM Web Client

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**.