Content Central User Guide

Document Management Software



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Preface

1. Foreword

When we at Ademero set out to design a document management system, we wanted to provide the framework and feature set that *you* the user have requested over the years. We believe Content Central has accomplished just that. We respect your thoughts and opinions and consider all feedback we receive from our customers. Always feel free to drop us a line via phone, Web, or e-mail. Customer satisfaction is our primary goal.

We've attempted to write this documentation in a way that provides concepts and definitions first and foremost before instructions. If for any reason any part of this document is unclear or the product does not perform as indicated or expected, please contact our support center below for a quick response and resolution to the issue you're experiencing. We pride ourselves on customer service; that's why we offer our support to you 24 hours-a-day, 7 days-a-week on any day of the year.

Ademero Support Channels

Phone	(863) 937-0272
Toll-Free	(888) 276-2914
E-mail	support@ademero.com [mailto:support@ademero.com]
Web Site	http://www.ademero.com/

2. Content Central Concepts

This section identifies the key concepts behind how this document management system operates. This information will help you throughout the rest of this document.

2.1. Documents

A document is represented as a file on the file system. What sets a document apart from other files is its use. documents usually contain text or other data that can be searched for retrieval. Common document formats include PDF [Definition: Portable Document Format], Microsoft® Word®, and Microsoft® Excel®. Some document formats contain content and/or metadata that may be inherited when imported. For a full list of these file types, see <u>Appendix A</u>, <u>Supported File Types with Existing Content</u>.

Document properties, also known as index fields, tags, or metadata, provide a classification system that helps you find documents more quickly and accurately in Content Central.



Ademero strongly recommends the use of document properties when capturing information.

When paper images have been captured from a scanner or other input device, Content Central converts them to PDF files. The PDF format conveniently stores images, text, and document properties in one file.

2.2. Document Types

Each document is described by a document type, which serves as a template for the document. Unique security permissions, fields for document properties, and more can be defined at the document-type level. Each document inherits these settings when captured.

2.3. Catalogs

A catalog contains information about a related set of documents in the system. You can create as many catalogs as needed. Catalogs usually take the form of an existing business department or business process. The information stored in a catalog is as follows:

- Document types
 - User & Group Permissions
 - Fields (metadata)
 - Text-Recognition Zones (Zonal OCR)
 - Barcode-Recognition Zones (Zonal Barcode)
 - Field-Lookup Integration
 - Approval Processes [Enterprise Edition]
 - Workflow Rules [Enterprise Edition]
 - Message Templates [*Enterprise Edition*]
 - Folder & File Building
 - Capture Forms
 - Retention Policy
 - Search & Results Display Fields
- Documents
 - Document Name (file name)
 - Document Location (file path)
 - Document properties (metadata)
 - Document Text (full text of a text-supported file format or OCR [Definition: Optical Character Recognition] from a captured image of a paper document)

Catalogs are created and managed by Content Central and are stored within the SQL database designated for Content Central.

2.4. Capture Types

DirectScanTM (Browser)

This Java[™] applet allows users to scan paper into the Web browser using a TWAIN-compliant scanner.

QCard™ (Browser, Monitored Folder, E-mail)	QCards TM contain barcodes used to identify individual paper documents in a batch. Users create and print QCards TM from their Web browser. QCard TM -attached documents can be scanned to the Web browser using the DirectScan TM applet, saved to a monitored folder, or sent to a monitored e-mail address.
CustomBarcode (Browser, Monitored Folder, E-mail)	Pages containing barcodes may be used to identify the beginning of paper documents in a batch. The information provided within the barcodes may be assigned to field data automatically. The paper documents can be scanned to the Web browser using the DirectScan TM applet, saved to a monitored folder, or sent to a monitored e-mail address.
PDF Form (AcroForm/XFA) (Browser)	New documents can be generated by filling out a PDF form based on a template in the system.
Drag & Drop Upload (Browser)	Users can drag one or more folders and files to one of two Java TM applets in the Web browser.
Single Upload (Browser)	Users can browse to a single file, classify it if desired, and upload it using the Web browser.
Multi Upload (Browser)	Users can browse to one or more folders and files and upload them using the Web browser.
Electronic (Monitored Folder, E- mail)	Files can be saved to a monitored folder or sent to a monitored e- mail address. They will be left in their native format and can be routed to either the <i>Coding Queue</i> or directly to a catalog.
Image-Only (Monitored Folder, E- mail)	Scanned images (TIFF, PDF, JPEG, BMP, PNG, GIF) can be saved to a monitored folder or sent to a monitored e-mail address. They will be converted to fully-searchable PDF files and can be routed to either the <i>Coding Queue</i> or directly to a catalog.
XML (Monitored Folder, E-mail)	Files can be identified with XML descriptors and saved to a monitored folder or sent to a monitored e-mail address. The XML file can contain document properties used to classify the document when captured. The target catalog and document type can also be defined in the XML file. For more information on the XML descriptor, visit <u>http://www.ademero.com/XmlSchemas/</u> ContentCentral/XmlCaptureDescriptor/.

2.5. Coding Methods

Pre-Capture Coding	Users select a catalog and document type and provide document properties <i>before</i> the capture process. Content Central automatically converts and routes these documents to their storage areas without the need for further user intervention.
Post-Capture Coding	Users designate the catalog, document type, and document properties <i>after</i> the capture process. Content Central routes these documents to the user's <i>Coding Queue</i> where they await catalog and document type selection and document properties coding. After a user codes a document in the <i>Coding Queue</i> , the document is routed to the storage area. Users who capture with this method will find the documents in

their personal *Coding Queue*. The nature of a Post-Capture Coding QCardTM allows the user to reuse the same QCardTM.

Versatile Coding	Users select a catalog, document type and <i>Coding Queue Destination</i> to which the document should be sent, and are given the option to provide document properties before <i>and/or</i> after capture. Documents will be routed to the <i>Coding Queue</i> for review and additional document properties before being routed to the storage area.
OCR Only / Capture Only	Users select a catalog and document type before capture, but document properties will <i>not</i> be added to these documents. Only the OCR process (images) or capture process (electronic) will be performed, and each document will be routed to its storage area using the filename from the original image or electronic file.

Revision History

2013-04-15	User Guide	Default Capture Catalog in <u>Preferences</u> Catalog Filtering in <u>Approval/Work Queue</u>
	Administration Guide	Merge Field Values in Workflow Action Types Combine Notes in Approval Processes Hide After Assignment in AP Groups Inactivity Logout in System Settings Catalog Gathering Performance in System Settings Search Synonym Character in System Settings Minimum Annotations in Dynamic Capture Forms Workflow-only Lookups in Field Lookups
2012-12-12	User Guide	Subfolder paging in Catalog Browser Streaming PDF Documents
	Administration Guide	Combine Field Values in Workflow Action Types Field-Lookup Bypass in System Settings PDF Streaming Viewer Settings in System Settings Allow Limitations on Fields in AP System Settings Catalog Browser Paging in Folder System Settings Auto Open Properties in Folder System Settings Combo-box Paging in Grid-Results System Settings Enable Thumbnails in Grid-Results System Settings Allow non-admin system fields in System Settings Allow capture-form field updates in System Settings Lookup Column in Packet Templates Thumbnail Creation in Managing Catalogs Pages Captured in System Fields Approval-Process Timeframe in Report Templates \$clickid in External Applications Field Permissions in Approval Processes Deleted-Content XML Compliance in System Folders Dynamic Capture Forms
	Barcode Symbologies	Added Code 128 (EAN-128)
2012-08-31	User Guide	Added Mobile Site Document-Type Filtering in Approval/Work Queue 2010 64-bit in Office Integration
	Administration Guide	Global-Field in DocType Update in Trigger Types Report Scheduler in Trigger Types Calculate Range in Workflow Action Types Export Data in Workflow Action Types Generate Report in Workflow Action Types Capture-Type Visibility in System Settings Hide Auto Capture-Date Properties in System Settings Allow Properties DocType Change in System Settings Always Use Full-Text Search Engine in System Settings ODBC drop-down list in Field Details Added Export-Data Templates Added Report Templates

Session Expiration in <u>Capture Forms</u> Priority in <u>Capture Jobs</u> Disable ODBC/Workflow in <u>Capture Jobs</u>

Added Advanced Search Syntax Appendix

2011-04-29	User Guide	Refresh Grid on DocProp Update in Preferences Added Saved Searches in Searching Office® 2010 compatibility in Editing Key-field lookup at capture in QCards			
	Administration Guide	 PIN in Approval-Process System Settings Include Creator Folder Setting in System Settings Notification Settings in System Settings Size columns to fit in Grid-Results System Settings Blank-page removal in Image-Capture System Settings Wildcard/Row Search Settings in System Settings Thread & 2-pass OCR Settings in System Settings Run External App for Custom Menu Items Packet lookups in Field-Lookup Integration Allow View in AQ in DocType Permissions New Document option in Zonal Recognition Regular Expressions in Zonal Recognition Use only left portion of field in Folder Building File Version in System Fields Limit duplicates by other field in Field Details 			
	Added Advanced Search Synt	ax Appendix			
2010-06-17	Updated Recommended Requ	irements for Server(s)			
2010-05-28	User Guide	Expirations for <u>Work Queue</u> Added <u>Document Sharing</u>			
	Administration Guide	<i>Limit Expiration (Work Queue)</i> in <u>System Settings</u> <i>Guest User</i> option in <u>Users</u> <i>Allow Document Sharing</i> in <u>Permissions</u>			
2010-04-15	User Guide	Added <u>Address Book</u> Added <u>Grid-Results Fields</u> Added <u>Event Viewer</u> Added <u>Document-Type QCard™</u> Added <u>Content Central Office Integration</u> Icon info for <u>Approval Queue/Messages</u> DirectScan [™] and Electronic for <u>Append/Replace</u> <i>System-Field</i> info in <u>Document Properties</u> <i>Missing Document-Type</i> info in <u>Viewing Packets</u>			
	Administration Guide	Drag-and-Drop settings in <u>System Settings</u> PDF Capture settings in <u>System Settings</u> RelayFax Response Capture in <u>System Settings</u> Administration Permissions for <u>Users/Groups</u> Added <u>System Fields</u>			

Document Creator Permissions

Peer-Review routing type for <u>Approval Processes</u>

Starting Member option for Approval Processes Creator member type for Approval Processes No-Deadlines for members in Approval Processes Custom Member Names option for Approval Processes System Field option for Approval Processes Global-Field Update in Workflow Trigger Types Equals Current Date for Workflow Field Evaluation <= Current Date (+ Offset) for Field Evaluation Perform Field Lookup in Workflow Action Types Merge Packet Field Values in Workflow Action Types Duplicate for Triggers, Actions, Rules, & Templates System Field option for Packet Templates Added Custom Menu Items

Appendices

Added Supported ODBC Providers

2010-01-07 Updated <u>Requirements</u> for Server(s) and Client Workstations

Part I. User Guide



Chapter 1. Introduction

In this chapter you will become familiar with the user interface of Content Central and gain an understanding of the basic procedures and abilities you will have. It's a good idea to read through the entire User Guide; however, if you will only be designated to a single operation, such as *Document Capture*, then you may wish to read only the section that pertains to you.

1. User Interface

To access Content Central you will need to launch your preferred Web browser and enter the URL (address) provided by your administrator. Once you've successfully accessed Content Central, you will need to provide your **Username** and **Password** (you should have received from your administrator) to login to the system.

If you would like to prevent having to log in each time, select the Keep me logged in check box.



This option may not be available in all configurations. Selecting the **Logout** button on the main menu will require you to log in again.



Logging In to Content Central

2. The Main Menu

The main menu is always located at the top of Content Central. From the main menu you can access the **Search**, **Folders**, and **Capture** areas. You can also **Search All Catalogs**, access your **Options**, **Logout** of Content Central, and get **Help**. Administrators can access the administration menu with the **Admin** button.

3. The Dashboard

The **Dashboard** displays your most recent <u>Messages</u>, <u>Approval Queue</u> documents, <u>Work Queue</u> documents, and <u>Coding Queue</u> documents. Clicking on any of these panels will take you to that specific

area in Content Central. Access the **Dashboard** at any time by selecting the logo located in the far-left area of the main menu.

content ²⁶ Search C Folders C Capture							
Search All C	atalogs	Search	Das	hbo	ard Ma	rk Thomas	(MThomas
Messages	(1 unread)			Ар	proval Queue (3)		
From	Subje	ct	Received		Document	Catalog	Received
🖂 CMorgan	Content Central - Use Request	r Check-In	8/28/2009 9:01 PM	٩	Charles Jones - Application for Admission.pdf	Student Records	8/28/2009 9:10 PM
Work Queue (3)				٩	Katherine Potter - Application for Admission.pdf	Student Records	8/28/2009 9:10 PM
	Document	Catalog	Received	٩	Pamela Troy - Application for Admission.pdf	Student Records	8/28/2009 9:10 PM
Josh Power Admission	ers - Application for pdf	Student Records	8/28/2009 9:05 PM	Co	ding Queue (2)		
Graduation	ers - Application for n.pdf	Student Records	8/28/2009 9:05 PM		Document	Catalog	Captured
Sosh Power Request.p	ers - Transcript df	Student Records	8/28/2009 9:05 PM	2	Josh Powers - Application for Admission.pdf	Student Records	8/28/2009 9:06 PM
				2	Alisa Martinez - Application for Admission.pdf	Student Records	8/28/2009 9:07 PM

The Dashboard

4. The Results Grid

The results grid displays information about documents and other content in the right frame (the *Results Frame*) below the main menu.

Each row in the grid contains a checkbox at the beginning of the row. These checkboxes may be selected to perform document actions on multiple documents at once. Use the **Check** menu to check **All**, check **None**, or **Invert** the value of each checkbox.

Next to each checkbox is a status icon. This icon displays the *Approval-Queue*, *Work-Queue*, or *Check-Out* status of each document in most results grids as defined below:

- Document is in your approval queue.
- [®] Document is on one or more approval processes.
- Document is in your work queue.
- Document is in one or more work queues.
- Document is available for check out.
- Document is currently checked out by another user.
- Document is currently checked out by you.
- ✓ Your permissions do not allow you to check out this document.

For icons displayed in the *Messages* folder, see <u>Chapter 5</u>, *The Messages Folder*. For icons displayed in the *Approval Queue*, see <u>Section 17</u>, "The Approval Queue [*Enterprise Edition*]". For icons displayed in the Coding-Queue, see <u>Section 8</u>, "The <u>Coding Queue</u>".

Other features of the grid may be useful to you:

Column Sorting To sort the grid either ascending or descending based on the data in any particular column, click the header for that column (the cell containing the field name). Click it again to alternate the sort direction (ascending vs. descending). The column sorted, as well as the direction sorted, is indicated

	on the grid header with the ▲ and ← icons. To remove sorting, select the Remove Sorting link next to the menu bar.
Field Grouping	You may group the results by one of the columns for a different view of your results. Click and hold the column header you would like to group by, and drag it into the area above the header with the message, "Drag a column header here to group by that column". To revert to the original results view, click and hold the column header again and drag it back into the results grid.
Column Arrangement	You can rearrange the order of the columns in the grid by clicking and holding a column header then moving it to the left or right until two red arrows appear. The new order will be saved for future results.
Column Resizing	You can resize columns in most grids by clicking and holding a column- header divider (the area between two column headers) followed by moving it to the left or right.
Refresh	Select the @ icon to refresh the grid at any time.
Export to Excel	The information contained within the grid can be exported to Microsoft® Excel® by selecting the \blacksquare icon in the upper-right portion of the results-grid frame.

5. User Options

The **Options** screen lets you update many settings specific to your user account. Access it by selecting the options button on the main menu.



The Options Screen

5.1. User Profile

You may update your profile information by selecting the *icon* in the **Options** screen. You can change your *name*, *e-mail address*, and *password* depending on your security level.

4

content v6	Search 🔁 Folders 😱 Capture Search All Catalogs 🚇 😩 Admin 🚺 Options 🙆 Logout 💽 Help
Options > Profile	
Your Profile You may update your	r profile from this page.
Username:	MThomas
First Name:	Mark
Last Name:	Thomas
E-mail Address:	mt@ademero.com
Change Password:	
Confirm Password:	
Apply 🧭	Cancel

User Profile

5.2. Preferences

There are several system preferences you can configure by selecting the icon in the **Options** screen. The following list explains each of the preferences.

Language	Select the language that you prefer to use while navigating the application. Default uses the language setting configured in your Web browser.
Default Capture Catalog	This selection determines the default Catalog selection when accessing the Capture area.
Automatically open the first document in any results grid.	When selected, the first document in a results grid will be opened.
Require a double-click to open a document.	By default, a single click on any results-grid row will open the document. This preference will require a double click to open a document.
Refresh grid when changing document properties.	Enabling this feature will cause any list of results to immediately update after document properties have been committed.
Disable PDF Streaming	This option appears when administrators have enabled PDF streaming. Select this checkbox if you wish to disable PDF streaming for your personal account.
Send a copy of each Content Central message to the e-mail address defined in my <i>User Profile</i> .	When selected, a copy of each Content Central message will be sent to your e-mail address.
Notify me when a new document arrives in my <i>Approval Queue</i> . [<i>Enterprise Edition</i>]	When selected, a message will be sent to you every time a document lands in your <i>Approval Queue</i> .

Notify me when a new document arrives in my <i>Work Queue</i> . [<i>Enterprise Edition</i>]	When selected, a message will be sent to you every time a document lands in your <i>Work Queue</i> .	
Notify me when a document arrives in my <i>Coding Queue</i> due to Zonal OCR processing. [<i>Enterprise</i> <i>Edition</i>]	When selected, a message will be sent to you when a document lands in your <i>Coding Queue</i> because of a potential problem with Zonal OCR processing.	
Notify me when a document cannot be processed by the Capture Service. [Administrators]	When selected, a message will be sent to you when a document cannot be captured.	
Automatically print QCards [™] .	When selected, Content Central will launch the print dialog in your PDF viewer when you select the \Box button to produce a QCard TM .	
Use default printer without prompting.	If the previous and current selections are enabled, the print dialog will be bypassed, and your default printer will receive the print job containing the QCards TM . Your PDF viewer may require a confirmation for security reasons.	

C	onten 26 Search 🗁 Folders 😱 Capture Search All Catalogs 😱 😤 Admin 💿 Options 🗿 Logout 💽 Help
(Dptions > Preferences
	Preferences
	Automatically open the first document in any results grid.
	Require a double-click to open a document.
	In Send a copy of each Content Central™ message to the e-mail address defined in my <i>User Profile</i> .
	✓ Notify me when a new document arrives in my Approval Queue.
	✓ Notify me when a new document arrives in my Work Queue.
	Notify me when a document arrives in my <i>Coding Queue</i> due to Zonal Recognition processing.
	Notify me when a document cannot be processed by the Capture Service.
	Automatically print QCards.
	Use default printer without prompting. (Note: A minimal confirmation dialog may still appear.)
	Cancel

User Preferences

5.3. Downloads and Installers

Select the **Deptions** screen to download and/or install helper applications.

Install Content Central Search Provider	Select this link to install Content Central as one of the search providers in your Web browser. With this feature installed, you will be able to use your Web browser's <i>Search</i> function to search for information within Content Central. Your query will be used to search all catalogs where you have the search permission.
Download Content Central Content Director	Select this link to install the <i>Content Director</i> application on your local desktop computer. This application allows you to edit

documents directly from the Content Central browser interface. Saving a document upon exiting its native application will automatically upload it to the Content Central server. For more information see <u>Section 9</u>, "Editing Documents".



Downloads and Installers

5.4. Address Book

Select the *icon* in the **Options** screen to access your personal **Address Book**.

Contacts in your address book can be used when sending documents via <u>e-mail</u> or <u>fax</u> or <u>sharing documents</u>. Records are stored unique by **Contact Name**.

content 26 Search 🚍 Folders 🎧 Capture Search All Catalogs 🚇 🕃 Admin 💮 Options 🔒 Logout 💽 Help					
ptions > A	ddress Book				
Address	s Book				
	Contact Name	Company Name	E-mail Address	Fax Number	
	Cindy Morgan	Ademero	cm@ademero.com	863-582-9438	
	Herb Mylett	Ademero	hm@ademero.com	863-582-9438	
	Jim Riley	Ademero	jr@ademero.com	863-582-9438	
	Jorge Cruz	Ademero	jc@ademero.com	863-582-9438	
	Sandra Brown	Ademero	sb@ademero.com	863-582-9438	
*					
🕞 Deleti	e) 🐼 Upload New				
Seck Back					

Address Book

5.4.1. Adding or Modifying a Contact

To modify an existing contact, double click the row you would like to modify, make changes, and click off the row to save the changes.

To add a new contact, double click the last row displayed on the current page. You must provide a valid **Contact Name** for each record. All additional columns are optional. When you have finished adding a

record, click off the row or select the Back button to return to the **Options** screen.

You can upload a comma-delimited text file containing a list of contacts by selecting the *Upload New* button, browsing to the file, and selecting the *Upload* button to process the file. Do not include a header record. Duplicate contacts will be discarded. The required format for the file is as follows:

Contact Name (required), Company Name (optional), E-mail Address (optional), Fax Number (optional)

5.4.2. Deleting One or More Contacts

To remove one or more contacts from your address book, select the checkbox in the row or rows you would like to delete from the current page, and select the Operate button.

5.5. Saved Searches

Manage your saved searches by selecting the icon in the **Options** screen.

To automatically perform a search when a saved search has been selected from the Search area, select

Auto-execute searches upon selection. Select the Apply button to apply your changes and return to the **Options** screen.

content v6 central	Search 🗁 Folders 😱 Capture Search All Catalogs 🕼 😩 Admin 🚱 Options 🙆 Logout 🕜 Help
Options > Saved S	earches
Manage Sav	ved Searches
Active	Public Title
💮 🙀 Yes	Yes Jones Engineering Checks
🛞 😫 Yes	No Potter Chemicals Invoices
« Prev. Next »	Saved Searches: 2
Auto-execute	searches upon selection
Apply (Cancel

Saved Searches

5.5.1. Modifying a Saved Search

To modify a search query, select the ^(a) icon in the appropriate row. Here you can edit the **Title**, determine whether the query will be **Enabled** and available for searching, and select whether the query will be

available for other users by making it **Public**. Select the button when you have finished modifying the query.

5.5.2. Deleting a Saved Search

To delete a search query, select the ***** icon in the appropriate row, followed by selecting the **Confirm** button to permanently delete the saved search.

5.6. Default Document Types

Choose your **Default Document Types** for each catalog by selecting the icon in the **Options** screen. A default document type is used for the following:

- Determines the document type of one or more uploaded files when using the results-grid drag-and-drop tool in the **Catalog Browser**.
- Determines the document type used when pasting one or more documents in the Catalog Browser.
- Appears first in document-type drop-down lists in the **Capture** frame and in the **Drag & Drop Upload** applet.

When you have finished selecting a default document type for a catalog, select the Apply button to save the changes. Select the Back button to return to the **Options** screen.

content 26 Search The Folders Capture Search All Catalogs
Options > Default Document Types
Assign Default Document Types for Document Capture
Catalog: Student Records
Default Doc Type: Application for Admission
Apply Constant Back

Default Document Types

5.7. Search Fields

You may pick the fields you wish to use during a search by selecting the icon in the **Options** screen.

Select the catalog and document type that you would like to manage.

Use the *real constant of the search fields* from the **Available Fields** box to the **Search Fields** box.

Use the \uparrow and \checkmark icons to change the order that the fields will appear on the screen.

The administrator may have defined a default set of fields that you can remove, if desired, using the 🖈 icon.

i Tip

Select **Add Capture/Edit Fields** below the **Search Fields** box to save time and add the fields designated as *capture fields*.

When you have finished selecting fields for a document type, select the without to save the changes.

Select the Select the Back button to return to the **Options** screen.

content v6 Search Folders	Capture Search All Calalogs 💽 🚼 Admin 💽 Options 🚹 Logout 💽 Help
Options > Search Fields	
Manage Search Fields	
Catalog: Student Records	
Document Type: Application for Admiss	ion 🗸
Available Fields	Search Fields
	Student ID
-	↓
• • • • • • • • • • • • • • • • • • •	
	Add Capture/Edit Fields

User Search Fields

5.8. PIN

Define your personal identification number by selecting the *icon* in the **Options** screen.

Your PIN will be needed when approving or rejecting documents. For more information, see <u>Section 17.1</u>, <u>"Approving</u>".

When you have finished adding or modifying your PIN, select the Apply button to save the changes. Select the Select the button to return to the **Options** screen.

5.9. DocType Results Fields

You may pick the document-type fields you wish to see in the results grid by selecting the $\square \bigcirc$ icon in the **Options** screen.

Select the catalog and document type that you would like to manage.

Use the *rieday* icon to add fields from the **Available Fields** box to the **Results Fields** box.

Use the \uparrow and \checkmark icons to change the order that the fields will appear in the grid.

The administrator may have defined a default set of fields that you can remove, if desired, using the < icon.

(i) **Tip** Select **Add Search Fields** below the **Results Fields** box to save time and add the fields from the

Search Fields option.

When you have finished selecting fields for a document type, select the Apply button to save the changes. Select the Select the button to return to the **Options** screen.

content v6 Search Folders	Capture Search All Catalogs 🕢 🚼 Admin 💮 Options 😭 Logout 💽 Help	
Options > Results Fields		^
Manage Results Fields		
Catalog: Student Records	V	
Document Type: Application for Adm	ssion	
Available Fields	Resulte Fields	
*DocName	*DocType	
*FriendlyName *Hits	Student ID Catalog	
*Relevance		
-		
ч	Add Search Fields	~

User Results Fields

5.10. Grid Results Fields

You may pick the grid-specific fields and system fields you wish to see in each results grid by selecting

the second icon in the **Options** screen.

Each grid type can have its own unique set of fields displayed as columns. Select the type of grid you would like to configure by selecting it from the drop-down list under the **Grid-Specific Fields** label.

Use the \Rightarrow icon to add fields from the **Grid-Specific Fields** and **System Fields** boxes to the **Results Fields** box.

Use the \uparrow and \checkmark icons to change the order that the fields will appear in the grid.

When you have finished selecting fields for a grid type, select the Apply button to save the changes. Select the Apply button to return to the **Options** screen.

content v6 Search	olders 🛴 Capture Search All Catalogs 🕓 🐔 Admin 🐼 Options 🚰 Logout 🚺 Help
Manage Grid-Specific and	System Results Fields
Grid-Specific Fields	Results Fields
Catalog Browser	Document Catalog Document Type Admission Approval Status Student Packet Status File Size

User Grid-Results Fields

5.11. Event Viewer

The event viewer allows you to track actions that you have performed while logged in to Content Central.

The event log also maintains records of documents that you have captured. Access it by selecting the icon from the **Options** screen.

You may filter your view by selecting any combination of options from the drop-down list above the log table. Select the *Apply* button to update the log table after you've chosen your filters. Use the paging bar below the log table to view additional pages of log entries.

Select the Select the Back button to return to the **Options** screen.

с	content 76 Search Capture Search Al Catalogs Admin Options A Logout O Help			
	Options > Event Viewer			
	Event Viewer			
	Action:	From Date:	Tol	Date: View: Sort:
	Login	4/14/2010	4/1	6/2010 🔽 5 💌 Descending 🕶 🐼 Apply
	Date	IP Address	Action	Login Status
	4/16/2010 4:17:16 PM	127.0.0.1	Login	Success
	4/16/2010 3:29:07 PM	127.0.0.1	Login	Success
	4/16/2010 3:21:34 PM	127.0.0.1	Login	Success
	4/16/2010 2:16:27 PM	127.0.0.1	Login	Success
	4/16/2010 2:15:08 PM	192.168.1.10	Login	Success
	« Prev Next »			Events: 11 Page 1 of 3
	7			
	(#**			
	A Back			

Event Viewer

6. Getting Help

If you get stuck or need to reference this documentation at any time, select the button at the top of the current dialog.

Chapter 2. Capturing Documents

This chapter will teach you how to capture both paper documents (from a scanning device) and electronic documents. If you haven't read the introductory sections, <u>Capture Types</u> and <u>Coding Methods</u>, you should do that now.

Access the **Capture** frame by selecting the **Capture** button from the main menu.

1. Capturing Paper Documents - DirectScanTM

The **DirectScan** applet allows you to capture paper documents from a scanning device connected to your computer. The following describes each of the coding methods available when capturing with **DirectScan**.

1.1. Pre-Capture Coding

Use this method of capture when you wish to capture a paper document and provide the document properties for that document *before* scanning.

- 1. Select the **DirectScan Capture Type**.
- 2. Select the Pre-capture coding Coding Method.
- 3. Select a catalog and document type to add the document to.
- 4. Enter information about the document into the appropriate field text boxes. If any key icons are displayed next to a field, you may select the **Perform key-field lookup** link to perform a real-time field lookup. One or more of the fields will be updated.
- 5. Optional: You can scan several documents with the same number of pages by selecting the **Fixed Page Count** checkbox and providing a number of **pgs per document**.
- 6. Select the Continue button to launch the **DirectScan** applet.
- 7. Scan the document as described in <u>Section 1.5</u>, "Using The DirectScanTM Applet".

content v6 Search] [=	Folders 😱 Capture Search All Catalogs 🚇 🐣 Admin 💿 Options 📔 Logout) 💽 Help
Capture Type DirectScan Coding Method Pre-capture coding Catalog	•	DirectScan™ Scanner: XPCTWAIN TIFF/JPEG Scanner ✓ Image: Scanner ✓ Scanner ✓ Move ✓ Delete ✓ Delete
Student Records Document Type Application for Admiss Application for Admiss Student Name Josh Powers Student ID 580-48-6030 Preview key field lookup Continue Clear	III	Image: Solution of the second of the seco
A	~	

Pre-Capture Coding with DirectScan

1.2. Post-Capture Coding

Use this method of capture when you wish to capture a paper document and provide the document properties for that document *after* scanning. Several documents may be scanned together when using the **Fixed Page Count** option as long as each document in the batch consists of the number of pages specified.

- 1. Select the **DirectScan Capture Type**.
- 2. Select the Post-capture coding Coding Method.
- 3. Select a catalog and document type to add the document to.
- 4. Optional: You can scan several documents with the same number of pages by selecting the **Fixed Page Count** checkbox and providing a number of **pgs per document**.
- 5. Select the **Continue** button to launch the **DirectScan** applet.
- 6. Scan the document as described in <u>Section 1.5, "Using The DirectScanTM Applet"</u>.

content 26 Search Capture Search All Catalogs 🕢 🟦 Admin 🗔 Options 🔒 Logout 🕜 Help		
Capture Type DirectScan Coding Method Post-capture coding Catalog Student Records Document Type	DirectScan TM Scanner: XPCTWAIN TIFF/JPEG Scanner Scan Hide Scan Dialog Settings Scan In Scan Dualog Delete Al Del	
Application for Admission Fixed Page Count pgs per document Continue		
ADEMERO	Viewing 1 - 3 of 3	

Post-Capture Coding with DirectScan

1.3. Versatile Coding

Use this method of capture when you wish to capture a paper document and provide the document properties for that document before scanning, after scanning, or at both times. Several documents may be scanned together when using the **Fixed Page Count** option as long as each document in the batch consists of the number of pages specified.

- 1. Select the **DirectScan Capture Type**.
- 2. Select the Versatile coding Coding Method.
- 3. Select a catalog and document type to add the document to.
- 4. Choose whether you want this document to be sent to your Personal Queue or the Shared Queue.

Note

The *Personal Queue* is visible to you only. The *Shared Queue* is visible to you and others with permission to add documents for the selected document type.

- 5. Enter information about the document into the appropriate field text boxes. If any key icons are displayed next to a field, you may select the **Perform key-field lookup** link to perform a real-time field lookup. One or more of the fields will be updated.
- 6. Optional: You can scan several documents with the same number of pages by selecting the **Fixed Page Count** checkbox and providing a number of **pgs per document**.
- 7. Select the **Continue** button to launch the **DirectScan** applet.
- 8. Scan the document as described in <u>Section 1.5</u>, "Using The DirectScanTM Applet".

content v6 Search		🗕 Folders 💽 Capture Search All Catalogs 🕢 🐔 Admin 🔯 Options 🙆 Logout 💽 Help
Capture Type DirectScan Coding Method Versatile coding Catalog	~	DirectScan TM Scanner: XPCTWAIN TIFF/JPEG Scanner
Student Records		
Student ID S80-48-6030 Preview key-field lookup Fixed Page Count	•	Viewing 1 - 3 of 3

Versatile Coding with DirectScan

1.4. OCR Only

Use this method of capture when you wish to capture only the (typed) full-text of a document. Several documents may be scanned together when using the **Fixed Page Count** option as long as each document in the batch consists of the number of pages specified.

- 1. Select the DirectScan Capture Type.
- 2. Select the OCR only Coding Method.
- 3. Select a catalog and document type to add the documents to.
- 4. Optional: You can scan several documents with the same number of pages by selecting the **Fixed Page Count** checkbox and providing a number of **pgs per document**.
- 5. Select the Continue button to launch the **DirectScan** applet.

6. Scan the document as described in <u>Section 1.5</u>, "Using The DirectScanTM Applet".



OCR-only Coding with DirectScan

1.5. Using The DirectScanTM Applet

This Java® applet allows you to capture paper documents with a TWAIN-compliant scanner connected to your computer. Once you've selected the Continue button from within the **Capture** frame, the DirectScanTM applet will launch in the right frame of Content Central. You may be asked to allow the applet to launch from within your browser. This is normal behavior. Once the applet has launched, perform the following steps:

- 1. Select the appropriate scanning device from the **Scanner** list.
- 2. Place the documents in your scanner's document feeder.
- 3. *Optional* If you would like to bypass your scanner's software dialog, select the **Hide Scan Dialog** checkbox and then select the Settings button to choose the scan settings.
- 4. Select the scan button.
- Choose the appropriate settings and options (if any) for your scanner and initiate the scanning process. When the scanner has completed, the images will appear in the DirectScan[™] applet.
- 6. Review the scanned images (see <u>Section 1.5.1, "Image Reviewing Tools</u>"). Use the horizontal scroll bar at the bottom of the image-preview frame to view images outside of the viewing area. Images will be grouped in sets of 25. To move from one group of images to another, select the **Prev Set** or **Next Set** buttons. If you wish to rescan the images, select the **Delete All** button and repeat steps 2 through 4.
- 7. Once you are satisfied with the scanned images, select the Select the Select the Initial button. The images will be uploaded to the Content Central server. The bar to the left of the button will indicate progress of the upload process.

content 26 Search	🗆 Folders 💽 Capture Search All Catalogs 🔍 🐔 Admin 🐼 Options 🗿 Logout 💽 Help
Capture Type DirectScan V Coding Method Pre-capture coding V Catalog Student Records V Document Type Application for Admiss V Application for Admiss V Student Name Josh Powers V Student ID 580-48-6030 Preview key-field lookup	DirectScan TM Scanner: XPCTWAIN TIFF/JPEG Scanner C Scanner: C C C C C C C C C C C C C C C C C C C
Clear	Finish

The DirectScan™ Applet

1.5.1. Image Reviewing Tools

The following tools, located above the image-preview frame, can be used to assist with the quality assurance process

🐻 Zoom In

Increases the visible dimensions of all images in the current image set

🗟 Zoom Out

Decreases the visible dimensions of all images in the current image set

C Rotate

Rotates the selected image(s) 90 degrees clockwise

Move the selected image before the previous image

Move 🔷

Moves the selected image after the next image

Deletes the selected image(s) from the current image set

2. Capturing Paper Documents - QCardsTM

The following describes each of the coding methods available when capturing paper documents with QCardsTM.

2.1. Pre-Capture Coding

Use this method of capture when you wish to capture a paper document and provide the document properties for that document *before* scanning.

1. Select the QCard Capture Type.

- 2. Select the **Pre-capture coding Coding Method**.
- 3. Select a catalog and document type to add the document to.
- 4. Enter information about the document into the appropriate field text boxes. If any key icons are displayed next to a field, you may select the **Perform key-field lookup** link to perform a real-time field lookup. One or more of the fields will be updated.
- 5. Optional: You can make this a Fixed Page Count QCard[™] by selecting the checkbox and providing a number of **pgs per document**.
- 6. Optional: You can allow field values for the documents to be obtained from an *External Data Source* when captured by selecting the **Perform key-field lookup at capture time** checkbox. The key field must be available on the QCardTM.
- 7. Optional: You can include an End-of-Document QCard[™] by selecting the checkbox.
- ^{8.} Select the \Box create button to generate the QCardTM.
- 9. Print the QCardTM.
- 10.Place the QCardTM on top of the document to be scanned. Place the optional End-of-Document QCardTM at the end of the document.
- 11.Scan the documents using your scanning device.



A Pre-Capture Coding QCardTM



An Included End-of-Document QCard^{IM}

2.2. Post-Capture Coding

Use this method of capture when you wish to capture a paper document and provide the document properties for that document *after* scanning. This QCardTM may be used as a *Fixed Page Count* QCardTM allowing you to scan multiple documents in with only one QCardTM as long as each document consists of the number of pages specified.

- 1. Select the **QCard Capture Type**.
- 2. Select the Post-capture coding Coding Method.
- 3. Optional: You can make this a Fixed Page Count QCard[™] by selecting the checkbox and providing a number of **pgs per document**.
- 4. Optional: You can allow field values for the documents to be obtained from an *External Data Source* when captured by selecting the **Perform key-field lookup at capture time** checkbox. The key field must be available on the QCardTM.
- 5. Optional: You can include an End-of-Document QCardTM by selecting the checkbox.
- ^{6.} Select the ^{Create} button to generate the QCardTM.
- 7. Print the QCard[™].
- 8. Place the QCardTM on top of the [first] document to be scanned. Place the optional End-of-Document QCardTM at the end of the last document.
- 9. Scan the documents using your scanning device.



A Post-Capture Coding QCard^{IIM}

2.3. Versatile Coding

Use this method of capture when you wish to capture a paper document and provide the document properties for that document before scanning, after scanning, or at both times. This QCardTM may be used as a *Fixed Page Count* QCardTM allowing you to scan multiple documents in with only one QCardTM as long as each document consists of the number of pages specified.

- 1. Select the QCard Capture Type.
- 2. Select the Versatile coding Coding Method.
- 3. Select a catalog and document type to add the documents to.
- 4. Choose whether you want this document to be sent to your Personal Queue or the Shared Queue.
 - Note

The *Personal Queue* is visible to you only. The *Shared Queue* is visible to you and others with permission to add documents for the selected document type.

- 5. Enter information about the document into the appropriate field text boxes. If any key icons are displayed next to a field, you may select the **Perform key-field lookup** link to perform a real-time field lookup. One or more of the fields will be updated.
- 6. Optional: You can make this a Fixed Page Count QCard[™] by selecting the checkbox and providing a number of **pgs per document**.
- 7. Optional: You can allow field values for the documents to be obtained from an *External Data Source* when captured by selecting the **Perform key-field lookup at capture time** checkbox. The key field must be available on the QCardTM.
- 8. Optional: You can include an End-of-Document QCardTM by selecting the checkbox.
- ⁹. Select the ^{Create} button to generate the QCardTM.

10.Print the QCard[™].

11.Place the QCardTM on top of the [first] document to be scanned. Place the optional End-of-Document QCardTM at the end of the last document.

12.Scan the documents using your scanning device.

content 26 Search	🛛 Folders 💽 Capture Search All Catalogs 🕓 🕃 Admin 🔯 Options 📔 Logout 🕜 Help	
Capture Type CCard Coding Method Versatile coding Catalog	User: MThomas Catalog: Student Records; Document Type: Application for Admission; Se Commas's queue.	
Student Records		
Student Name Josh Powers Student ID S80-48-6030 Derever key, field lookup	Document Properties Student Name: Josh Powers Student ID: 580-48-6030	
✓ Fixed Page Count	Fixed Page Count: 2	-

A Versatile Coding QCardTM

2.4. OCR Only

Use this method of capture when you wish to capture only the (typed) full-text of a document. This QCardTM may be used as a *Fixed Page Count* QCardTM allowing you to scan multiple documents in with only one QCardTM as long as each document consists of the number of pages specified.

- 1. Select the QCard Capture Type.
- 2. Select the OCR only Coding Method.
- 3. Select a catalog and document type to add the documents to.
- 4. Optional: You can make this a Fixed Page Count QCard[™] by selecting the checkbox and providing a number of **pgs per document**.
- 5. Optional: You can allow field values for the documents to be obtained from an *External Data Source* when captured by selecting the **Perform key-field lookup at capture time** checkbox. The key field must be available on the QCardTM.
- 6. Optional: You can include an End-of-Document QCard[™] by selecting the checkbox.
- 7. Select the \Box create button to generate the QCardTM.
- 8. Print the QCardTM.
- 9. Place the QCardTM on top of the [first] document to be scanned. Place the optional End-of-Document QCardTM at the end of the last document.

10.Scan the documents using your scanning device.



An OCR Only QCard^{IM}

3. Capturing Paper Documents - Document-Type QCardTM

Document-Type QCardsTM can be printed and used to change the document type within a batch of paper documents sharing the same document properties.

Note

A Document-Type QCardTM can be used more than once and is compatible with any *coding method*.

Example 2.1. Document-Type QCardTM Example

A user creates a **Pre-capture coding** QCardTM for the primary (first) document type in the batch to be scanned. This QCardTM specifies document properties for all documents in the batch to be scanned.

A Document-Type QCardTM is printed for every additional document type in the batch. These QCardsTM are placed in front of the document they represent.

The user scans the batch of documents. The Capture Service splits the batch into individual PDF documents based on the document type represented by each QCardTM, and all documents receive the document properties represented by the **Pre-capture coding** QCardTM.

3.1. Creating a Document-Type QCardTM

- 1. Select the Document-Type QCard Capture Type.
- 2. Select a catalog and document type.
- ^{3.} Select the \square Create button to generate the QCardTM.
- 4. Print the QCardTM.
- 5. Place the QCardTM on top of its document to be scanned.

6. Assemble the batch of documents, making sure the first QCardTM for the batch is a regular QCardTM, and scan the documents using your scanning device.



A Document-Type QCard^{IM}

4. Capturing Paper Documents - QCardTM Packet

QCard[™] Packets are based on packet templates defined by your administrator. This capture type allows you to produce multiple QCards[™] in one step.

4.1. Creating a QCardTM Packet

Use this method of capture when you wish to capture a packet of paper documents.

- 1. Select the QCard Packet Capture Type.
- 2. Select the **Packet** template.
- 3. Enter information about the documents into the field text boxes. Only the fields shared among all the document types in the packet template will be visible. If any key icons are displayed next to a field, you may select the **Perform key-field lookup** link to perform a real-time field lookup. One or more of the fields will be updated.
- 4. Optional: You can allow field values for the documents to be obtained from an *External Data Source* when captured by selecting the **Perform key-field lookup at capture time** checkbox. The key field(s) must be available on the QCardsTM.
- 5. Optional: You can include one End-of-Document QCard[™] at the end of the packet by selecting the checkbox.
- ^{6.} Select the \Box Create button to generate the packet of QCardsTM.
- 7. Print the QCardsTM.
- 8. Place each QCardTM on top of its document to be scanned. Place the optional End-of-Document QCardTM at the end of the packet.

9. Scan the documents using your scanning device.

content 26 Search Capture Search All Catalogs 🕼 Admin 💿 Options 🔒 Logout 💿 Help			
Capture Type QCard Packet Packet Student Packet Student ID 580-48-6030 Student Name Josh Powers Include EOD QCard Clear	User: MThomas Catalog: Student Records; Document Type: Application for Admission ACC001		
ADEMERO	Document Properties Student ID: 580-48-6030 Student Name: Josh Powers		

A QCard^{IM} Packet

5. Capturing Paper Documents - Custom Barcode

You can scan documents containing custom barcodes with the **Custom Barcode Capture Type**, utilizing the DirectScanTM applet.

- 1. Select the Custom Barcode Capture Type.
- 2. Select a catalog and document type to add the document to.
- ^{3.} Select the **Continue** button to launch the **DirectScan** applet.
- 4. Scan the document as described in <u>Section 1.5</u>, "Using The DirectScan[™] Applet".

content 06 Search	🛛 Folders 🎑 Capture Search All Catalogs 🔍 🐔 Admin 🔅 Options [Algout 🕜 Help
Capture Type DirectScan V Coding Method Post-capture coding V Catalog Student Records V	DirectScan TM Scanner: XPCTWAIN TIFF/JPEG Scanner Scanner: XPCTWAIN TIFF/JPEG Scanner Scan Hide Scan Dialog Settings Scanner: XPCTWAIN TIFF/JPEG Scanner Scan Hide Scan Dialog Settings Zoom In Zoom Out Scaner Move Move Delete Delete All
Document Type Application for Admission ♥ Fixed Page Count pgs per document Continue ₹	Image: Source of the state
ADEMERO	Finish
Capturing with Custom Barcodes

6. Capturing Electronic Documents

If you would like to capture documents and/or other files that you have local access to, you may use these features to import those documents or files into Content Central. Single files can be uploaded using the **Capture** frame, and multiple files can be uploaded using the **Drag & Drop Upload** applet in the <u>Catalog</u> **Browser**.

6.1. Using the Capture Frame

Files can be individually uploaded using the **Electronic Capture Type** in the **Capture** frame. The following sections describe the various **Coding Methods** available when uploading documents.

Note

When uploading an existing PDF document, you will be presented with three upload options before the document is committed to the catalog.

Capture file in original form	The document will be left as-is and committed to the catalog with the document properties supplied. If the document does not already contain OCR text for full-text searching, the only information that will be searchable will be the document properties.
Convert to a fully-searchable PDF	The document will be converted to a new PDF containing document properties and OCR for full-text searches.
Make fully-searchable, but leave file in original form	Images will be processed for OCR text, but the file will remain in its original format. The OCR and document properties will be stored only in the Content Central database.

The document may be viewed in the area below these options by selecting the **View Document** link. After choosing an upload option, select the *Apply* button to complete the upload process.

content v6 Search	Folders 🕞 Capture Search All Calalogs 🕓 🐣 Admin 🐼 Options 🙆 Logout	Thelp
Electronic Coding Method Pre-capture coding Catalog	PDF Upload Options © Capture file in original form. © Convert to a fully-searchable PDF. O Make fully-searchable, but leave file in original form.	
Student Records	C Apply View Document	
Application for Admissit Student Name	UNIVERSITY OF SOUTH FLORIDA Undergraduate Application for Admission • p	age 1
Josh Powers	LEGA MARE LAST INSU MOREL SOCIAL SECURITY NUMBER SOCIAL SECURITY NUMBER SOCIAL SECURITY NUMBER POWERS TOSHE AND MAREL MAREL SOCIAL SECURITY NUMBER SOCIAL SECURITY NUMBER FOWER MAREL TOSHE AND MAREL MAREL SOCIAL SECURITY NUMBER SOCIAL SECURITY NUMBER FOWER MAREL TOSHE AND MAREL MAREL SOCIAL SECURITY NUMBER SOCIAL SECURITY NUMBER FOWER MAREL TOSHE AND MAREL MAREL SOCIAL SECURITY NUMBER SOCIAL SECURITY NUMBER FOWER MAREL TOSHE AND MAREL MAREL SOCIAL SECURITY NUMBER SOCIAL SECURITY NUMBER FOWER MAREL TOSHE AND MAREL MAREL SOCIAL SECURITY NUMBER SOCIAL SECURITY NUMBER	10
Preview key-field lookup	АССИЗЗ (STIET IN MEER APT) <u>SBO</u> <u>SANDY (BFAC H BL-UD, H 402</u> , CTS (STIE <u>STIE BFACH</u>) WEST (PIUM (BFACH, 1 33405) WEST (PIUM (BFACH, 1 33405) REAL STIER (STIER) REAL STIER) REAL STIER (STIER) REAL STIER (STIER) REA	
Select document to capture. Browse	- JAMES POWERS FATHER ADDRESS FOR THE NAMER APT, SAME AS A BOV G. ()	
Clear	NADIO O' O' DIZENSHP "YE YOU ABE A REMARKINI MMCGANT, ATACH A RHOTOCOPY O' YOUR ALE "NULS nother?" BERKTBATEN CART	

6.1.1. Pre-Capture Coding

Use this method of capture when you wish to capture an electronic document and provide the document properties for that document *before* uploading.

- 1. Select the **Electronic Capture Type**.
- 2. Select the **Pre-capture coding Coding Method**.
- 3. Select a catalog and document type to add the document to.
- 4. Enter information about the document into the appropriate field text boxes. If any key icons are displayed next to a field, you may select the **Perform key-field lookup** link to perform a real-time field lookup. One or more of the fields will be updated.
- 5. Browse to the location of the local file.

Choose file		? 🗙
Look jn:	🔁 Josh Powers 💽 🗢 🛍 📅	
My Recent Documents Desktop	Dosh Powers - Application For Admission.doc	
My Documents		
My Computer		
S		
My Network Places	File name: Josh Powers - Application For Admission.doc Files of type: All Files (".")	Open Cancel

Browsing for an Electronic File

6. Select the *Outpland* button to begin the upload process.



Capturing an Electronic File with Pre-Capture Coding

6.1.2. Post-Capture Coding

Use this method of capture when you wish to capture an electronic document and provide the document properties for that document *after* uploading.

- 1. Select the Electronic Capture Type.
- 2. Select the **Post-capture coding Coding Method**.
- 3. Select a catalog and document type to add the document to.
- 4. Browse to the location of the local file.
- 5. Select the Supposed button to begin the upload process.

content 06 Search	Folders 🛴 Capture Search All Catalog: 🕥 🐔 Admin 🔯 Options 🔁 Logout 💽 Help
Capture Type Electronic Coding Method Post-capture coding Code Student Records Code Application for Admission Select document to capture. Codocuments Browse Codocuments Browse	Upload Successful The document you have uploaded should be available in the system momentarily. You may capture another document after making appropriate selections in the capture frame.

Capturing an Electronic File with Post-Capture Coding

6.1.3. Versatile Coding

Use this method of capture when you wish to capture an electronic document and provide the document properties for that document before uploading, after uploading, or at both times.

- 1. Select the **Electronic Capture Type**.
- 2. Select the Versatile coding Coding Method.
- 3. Select a catalog and document type to add the document to.
- 4. Choose whether you want this document to be sent to your Personal Queue or the Shared Queue.
 - Note

The *Personal Queue* is visible to you only. The *Shared Queue* is visible to you and others with permission to add documents for the selected document type.

5. Enter information about the document into the appropriate field text boxes. If any key icons are displayed next to a field, you may select the **Perform key-field lookup** link to perform a real-time field lookup. One or more of the fields will be updated.

- 6. Browse to the location of the local file.
- 7. Select the Outpload button to begin the upload process.

content v6 Search		Folders 💽 Capture Search Al Catalogs 🔛 🐔 Admin 🗇 Options 🔁 Logout 🕜 Help
Capture Type Electronic Coding Method Versatile coding	•	Upload Successful The document you have uploaded should be available in the system momentarily. You may capture another document after making appropriate selections in the capture frame.
Catalog Student Records		
Document Type Application for Admissic	=	
Destination Personal Queue		
Student Name Josh Powers		
 ✓ 580-48-6030 ✓ Preview key-field lookup 		
Select document to capture.	~	

Capturing an Electronic File with Versatile Coding

6.1.4. Capture Only

Use this method of capture when you wish to capture an electronic document without providing any document properties.

- 1. Select the Electronic Capture Type.
- 2. Select the Capture only coding Coding Method.
- 3. Select a catalog and document type to add the document to.
- 4. Browse to the location of the local file.
- 5. Select the Suplead button to begin the upload process.



Capturing an Electronic File As Is

6.2. Using the Drag & Drop Upload Applets

Documents and other content can be uploaded in three different ways using the Catalog Browser. To

access the **Catalog Browser**, select the ^{cate} button from the main menu followed by the ^{cate} icon in the left frame. Next, select a folder to upload one or more documents into. The following sections describe how to upload documents and other content inside the **Catalog Browser**.

content 26 Search	olders 💽 Capture Search All Catalogs 🕓 🚷 Admin	Options 🔁 Logout 👩 Help
	Check File Edit Modify View 🕖 Drop file(s)	here to upload Docs: 12 💌
Messages	Drag a column header here to group by that column.	
	Document Catalog Document Typ File Size	Date Modified Student Name Student ID
🗾 Checked Out	🔽 👼 Josh Powers - Ap Student Records Application for Ar 356,146	8/28/2009 4:19: Josh Powers 580-48-6030 🔄
	🔲 🥪 Josh Powers - Ap Student Records Application for Gr 🔰 129,839	8/28/2009 4:19: Josh Powers 580-48-6030
试 Approval Queue	Josh Powers - Ap Student Records Application for Ri 162,551	8/28/2009 4:19: Josh Powers 580-48-6030
	□ ✓ Josh Powers - Cł Student Records Change of Addre 69,511	8/28/2009 4:19: Josh Powers 580-48-6030
🦾 Work Queue	🔲 ✔ Josh Powers - Cc Student Records Conduct Stateme 122,450	8/28/2009 4:19: Josh Powers 580-48-6030 😱
Coding Queue	UNIVERSITY OF SOUTH FLORIDA Undergraduate Ap	plication for Admission • page 1
	LEGAL NAME (LAST, FIRST, MIDDLE) SOCIAL SECURITY	NUMBER SOCHSCOSO
Catalog Browser	FORMER NAMES (list any first or last names under which transcripts or other records may be issued)	
E - T Student Records	ADDRESS ISTREET, NUMBER, APTI <u>S80</u> SANDY BEACH BLUD, 4402 CITY STATE ZP UTY STATE	COUNTY PALM BEACH Email address
Charlos Jones	in case of emergency notify: NAME	RELATIONSHIP
Josh Powers	ADDRESS (STREET, NUMER, APL) SAME AS A BOVE CITY, STATE, ZIP	TELEPHONE
Pamela Trov	NATION OF CITIZENSHP "IF YOU ARE A PERMANENT XULS LLOTHER" BEOISTRATION CARD	IMMIGRANT, ATTACH A PHOTOCOPY OF YOUR ALIEN

Selecting a Folder to Upload Documents in the Catalog Browser

6.2.1. Using the Context Menu or File Menu

Any folder in the **Catalog Browser** tree can be right-clicked to produce a context menu containing the **Add Documents(s)** menu item. This same menu item can be accessed from the **File** menu in the *Results Frame*. After selecting this menu item, the **Drag & Drop Upload** applet will appear in a new window.

content 06 Search	🔁 Fol	Iders	Capture	Search A	ll Catalogs 🕓	Admin	Options	🔒 Logout 🕜	Help
		Chec	k File Edit	t Modify Vi	ew 🕖	Drop file(s	s) here to upload	Docs	: 12 💌
Messages		Drag a	column header h	ere to group by the	at column.				
			Document	Catalog	Document Typ	File Size	Date Modified Stu	ident Name Studer	it ID
Checked Out		🗹 🗟	Josh Powers - A	Ar Student Records	Application for A	356,146	8/28/2009 4:19: Josl	h Powers 580-48-60	130 🔼 📤
			Josh Powers - A	of Student Records	Application for G	129,839	8/28/2009 4:19: Jos	h Powers 580-48-60	130 🗉
试 Approval Queue			Josh Powers - A	v Student Records	Application for R	162,551	8/28/2009 4:19: Jost	h Powers 580-48-60	130
			Josh Powers - C	3 Student Records	Change of Addre	69,511	8/28/2009 4:19: Jost	h Powers 580-48-60)30
🚰 Work Queue			Josh Powers - C	Constudent Records	Conduct Stateme	122,450	8/28/2009 4:19: Jost	h Powers 580-48-60	j30 🗸
Coding Queue		l	USF SOU	VERSITY OF TH FLORIDA	Under	graduate A	pplication for Ac	lmission • page 1	Ì
		LE	GAL NAME (LAST, FIRST,		EL.	SOCIAL SECURI	TYNUMBER S 30	48 60 30	·
Cotolog Drowoor		FO	RMER NAMES (list any fir	st or last names under whi	ich transcripts or other reco	rds may be issued)			·
Rename Folder		AL	DRESS (STREET, NUMBE	R, APT.) Y BFACH BLU	0. #402		PALM BEACH		
Delete Folder		CT V	VEST PALM ARA	rt, FL 33405	(92 /SO 2	-5367	E-mail address	mail.com	
Add Document(s)		in	case of emergency notify: TAMES POWER	NAME S			FAT HER		
Properties		AD	DRESS (STREET, NUMBER	R, APT.) ノ丘	CITY, STATE, ZIF)	TEU (EPHONE)	
Katherine Potter		N	TION OF CITIZENSHIP		*E Y	OU ARE A PERMANEN	IT IMMIGRANT, ATTACH A PHOT	FOCOPY OF YOUR ALIEN	· .

The Catalog Browser Context Menu

Files can be queued for upload in two ways. Selecting the O Add button will provide you with a browse dialog used to choose one or more files you have local access to.

Select the appropriate **Document Type** from the drop-down list.

You can also drag folders and files from your computer desktop or a system file explorer and drop them into the area labeled **Drop Files Here**.

Use the OREMOVE button to remove one or more files from the queue.

After queuing one or more files or folders, select the *Couplead* button to upload the files to the Content Central server. Select the *Concel* button to cancel the upload.

🖉 Drag & Drop Upload - Windows Internet Explorer	
Drag & Drop Upload	🕜 Help
Document Type: Application for Admission	
File Alisa Martinez - Application for Admission.pdf Charles Jones - Application for Admission.pdf Josh Powers - Application for Admission.pdf Katherine Potter - Application for Admission.pdf Pamela Troy - Application for Admission.pdf Spencer Bowman - Application for Admission.pdf	Size 301 KB 309 KB 347 KB 312 KB 293 KB 321 KB
Add Remove	Dpload
© Close	A 1000 -

The Drag & Drop Upload Dialog

6.2.2. Using the Results-Frame Upload Area

One or more folders or files can be dragged from your computer desktop or system file explorer and dropped into the area of the *Results Frame* labeled **Drop files here to upload**.

The upload process will begin immediately after files have been dropped into the designated area. Select the \emptyset icon to cancel the upload.

Note

The default document type chosen for the catalog will be used to identify the uploaded documents. For more information, see <u>Section 5.6, "Default Document Types"</u>.

content v6 Search	Folders 😱 Capture Search All Catalogs 😩 🐔 Admin 🔯 Options 🐴 Logout	Help
	Check File Edit Modify View 🕖 Drophile(s) here to upload	Docs: 12 📧
Messages	Drag a column header here to group by that column.	n.pdf
	Document Catalog Document Tyr File Josh Powers - Declaration of College.p	off Student ID
Checked Out	Josh Powers - Ap Student Records Application for Ac 2 Josh Powers - Enrolline Certification	580-48-6030 🛕
	🔲 🤤 Josh Powers - Ap Student Records Application for Gr 129,839 8/28/2009 4:19: Josh Powers	580-48-6030
试 Approval Queue	Josh Powers - Ap Student Records Application for R 162,551 8/28/2009 4:19: Josh Powers	580-48-6030
	Josh Powers - CF Student Records Change of Addre 69,511 8/28/2009 4:19: Josh Powers	580-48-6030
Work Queue	Josh Powers - Cc Student Records Conduct Stateme 122,450 8/28/2009 4:19: Josh Powers	580-48-6030 🗸
Coding Queue	UNIVERSITY OF SOUTH FLORIDA Undergraduate Application for Admission	• page 1
Catalog Browser	LEGAL NAME (LAST, FIRST, MODE) SOCIAL SECURITY NUMBER POWERS_ITASHUA MATT INE W FORMER NAMES (list any first or lat names under which transcripts or other records may be issued)	030
	SSO SANDY BEACH BLUD. # 402 PALM BEACH	
- Alisa Martinez	WEST PALM ARAM, FL 33405 POST SS67 JOWERS @ Mymail. com	
	in case of emergency notify: NAME JAMES POWERS FATHER	
-Sosh Powers	ADDRESS (STREET, NUMBER, APT.) CITY, STATE, ZIP TELEPHONE SAME AS A BOVE ()	
Katherine Potter	NATION OF CITIZENSHIP 'F YOU ARE A PERMANENT IMMIGRANT, ATTACH A PHOTOCOPY OF YOUR XLIS DOTHER! REGISTRATION CARD	

Dragging Files Into the Results Frame

7. Creating New Documents From PDF-Form Templates

Use this capture type when you want to generate a new document from a PDF-Form template.

- 1. Select the Form Capture Type.
- 2. Select a catalog and document type to add the document to.
- 3. Enter information about the document into the appropriate field text boxes.
- 4. Select the Continue button to load the form.
- 5. Fill out the form as required.
- 6. Select the proper submission button in the form to complete the process.

content v6 Search Folders	Capture Search All Catalogs	🕽 🕃 Admin 💿 Options 🔒 Logout 👩 Help
Capture Type	CHANGE OF	ADDRESS FORM
Student Records	Last Name	First Name M.L
Document Type		
Change of Address 💌	Local Address	Emergency Contact
Form Change of Address For Student Name Josh Powers Student ID 580-48-6030 Clear Clear	505 Sandy Beach Blvd. #402 Street West Palm Beach FL City State [33405] 954-502-5567 Zp Code Tekpthome Submit Submit	George Powers Name 505 Sandy Beach Blvd. #402 Street West Palm Beach FL City State 33405 954-502-5567 Zip Code Telephone Reletion: © Parent/Guardian © Spouse

Creating New Documents using a PDF Form

A new document will be created and stored in the selected catalog immediately after submitting the form. When accessed inside Content Central, this new document can be modified and re-submitted to generate a new version of the document automatically.

8. The Coding Queue

Any documents that have been captured using *Post-Capture coding* or *Versatile coding* must be fully coded before they will be routed to their appropriate storage area. The *Coding Queue* in your **Folders** frame holds these documents for you to code.

Two types of documents can exist within the *Coding Queue*. Personal documents are identified by the a icon and shared documents are identified by the icon.

Personal Documents	Documents captured using the <i>Post-capture</i> coding method and documents captured using the <i>Versatile</i> coding method with a <i>Personal Queue</i> destination will become personal documents. These documents will only appear to the user who captured the documents.
Shared Documents	Documents captured using the <i>Versatile</i> coding method with a <i>Shared Queue</i> destination will become shared documents. These documents will appear to all users who have permission to add documents for the document type selected during the capture process.

content v6 Search	🔁 Folders	Capture	Search All Cata	elogs 🕓 🔒 A	dmin 🚯 Optic	ns 🔒 Logout	Help
Massagas	Check	File Modify	a group by that colu	ממו			Docs: 2 💌
Messages	Drag a con	Document	Catalog	Document Type	Date Captured	Student Name	Student ID
Checked Out	🗹 🏯 J	osh Powers - Applic	Student Records	Application for Admi	8/28/2009 9:06:49	Josh Powers	580-48-6030
<u></u>	🗆 🎱 A	lisa Martinez - Appli	Student Records	Application for Admis	8/28/2009 9:07:51	Alisa Martinez	123-45-6789
Approval Queue							
🚰 Work Queue							
Coding Queue		SF UNIVE	RSITY OF FLORIDA	Undergradua	te Application	for Admission •	page 1
Custom Policies	LEGAL	NAME (LAST, FIRST, MIDDL	E)	SOCIA	L SECURITY NUMBER		
Catalog Browser	FORME	NERS JASHU RNAMES (list any first or la	A MATTHEW st names under which trans	ripts or other records may be is	sued)	30 MB 60	1310
		SS (STREET, NUMBER, APT. C SANDY BF TATE. 2P ST PPILM BEAM, 19 of ormorgancy notify: NAME MES POWERS SS (STREET, NUMBER, APT.) 16 AS A BOVE	1 EACH BLUD 9 EL 33405 E	4 402 Home Telephone 192 ASO 3-586 7 CITY, STATE, ZIP	COUNTY PALM B Email address DPDWPD RELATIONSHI FATHER	FACH PMYMAIL.COM TELEPHONE ()	
	MATION XU.S	OF CITIZENSHIP S. OTHER		IF YOU ARE A PE REGISTRATION (RMANENT IMMIGRANT, ATT/ CARD.	CH A PHOTOCOPY OF YOUR	

The Coding Queue

To begin coding these documents, select the **Code Document**(s) menu item from the **Modify** menu. The **Document Properties** frame will appear on the right side of your browser. Select the catalog and document type, enter appropriate information for any fields listed, then select the **Count** button to save changes to the properties and route the document from the queue to the catalog, or select the **Count** button to save changes and leave the document in the *Coding Queue*. When committing the document to the catalog,

Content Central will route the file to the appropriate storage area, and the next document in the results grid will load for coding.

If any key icons are displayed next to a field, you may select the **Perform key-field lookup** link to perform a real-time field lookup. One or more of the fields will be updated.

If a **Use Filing Rules** checkbox is presented, you may choose whether or not the field information will cause the file name to change.

cor	nter cen	tral 06 Se	earch 🔁 Fold	ers	Search A	I Catalogs	🔒 Admin 🔅	Optio	ons 🛃 Logout 🕜 Help
Ch Dra	eck gad	File Modify	o group by that colu	mn.			Docs: 2	×	🔶 Document Properties
		Document	Catalog	Document Type	Date Captured	Student Name	Student ID		Catalog:
	쬺	Josh Powers - Applic	Student Records	Application for Admis	8/28/2009 9:06:49	Josh Powers	580-48-6030		Student Records
	2	Alisa Martinez · Appli	Student Records	Application for Admis	8/28/2009 9:07:51	l Alisa Martinez	123-45-6789		Document Type:
									Application for Admission 🔽
					Student Name Josh Powers				
	ι	JSF SOUTH	RSITY OF FLORIDA	Undergradu	iate Applicatio	n for Admissio	n • page 1		Student ID 580-48-6030 Preview key-field lookup
		AL NAME (LAST, FIRST, MIDD <u>クロビアミーブのSHC</u> MER NAMES (list any first or I	LE) A MATTHEW last names under which trans	scripts or other records may be	AL SECURITY NUMBER	5 80 48	6030		Commit 🐼 Update
		RESS (STREET, NUMBER, AP STATE, ZP LST PALM AFA'T, STATE, ZP LST PALM AFA'T, STATE, ZP AFS PONERS, AP AFS PONERS, AP AFS ABOVE ON OF CITIZENSHIP	Г) FACH BLUD, <u>1</u> FL 3340S RE	H 402 HOME TELEPHONE (72 ASO & 536 CITY, STATE, ZIP HE YOU ARE A	COUNTY PALM E-mail add POPUM RELATIONS F AT HE	BFACH ress PLS O MY JMG 1 / . POJ SHIP R TELEPHONE () ATTACH A PHOTOCOPY OF YI	by Dur Alien	-	

Coding Documents in the Coding Queue

Chapter 3. Searching for Documents

1. Search Procedures

A very common operation for users of a document management system is searching for documents. Search queries are performed in the left frame, results will be displayed in the upper-right frame, and documents will be displayed in the lower-right frame (for document formats having browser plugins).



The Search Frame

Performing a search is as simple as selecting one or more catalogs and document types, entering criteria in

one or more field search textboxes, and selecting the button. Some search boxes contain predefined choices that you can select from a list. The most efficient searches result from searching document properties such as *Name* or *Number*. These searches will narrow your results down considerably.

You can instead choose to select an existing query from the **Saved Searches** drop-down list, if available. The saved query will be entered automatically, and the search will be performed automatically if the appropriate option has been enabled. For more information, see <u>Section 5.5</u>, "Saved Searches".

content v6 Search		- Fo	Iders	Capture	Search All Ca	atalogs	Admin	Options	Logout 🕜 He	lp
Search by Packet	^	Ch Dra	eck agad	. File Modify ∨	iew 🕖 Rei oup by that colun	move So nn.	orting		Results: 1	2 💌
Full-Text Search 🛛 👻				*DocName	*Catalo <u>c</u>	1	*DocType 📥	Student Name	Student ID	
			R	Josh Powers - Application	Student Records		Application for Admission	Josh Powers	580-48-6030	
Search all versions			۵	Josh Powers - Application	Student Records		Application for Graduation	Josh Powers	580-48-6030	
Search			V	Josh Powers - Application	Student Records	\$	Application for Residence	Josh Powers	580-48-6030	
Clear			~	Josh Powers - Change of	Student Records	5	Change of Address	Josh Powers	580-48-6030	
Catalogs	∃		•	Josh Powers - Conduct 9	Student Records	5	Conduct Statement	Josh Powers	580-48-6030	
Student Records			V	Josh Powers - Declaratio	Student Records	5	Declaration of College	Josh Powers	580-48-6030	~
Document Types			τ	ISF UNIVERS	ITY OF	Ui	ndergraduate App	ication for Adm	ission • page 1	1
Declaration of Collec Enrollment Certificat		L		SOUTH F	LORIDA					
 ✓ Fee Adjustment Rec ✓ Grade Forgiveness F 		L	P	AL NAME (LAST, FIRST, MIDDLE) <u>2 W.E.R.S. J.O.S.H.J.A.</u> MER NAMES (list any first or last na	MATT HEW	ripts or oth	social Security N	JMBER S304	8 6030	
		L	ADD	RESS (STREET, NUMBER, APT.)	HBLUD +	440.	2	PALM BEACH		
Student Name			Ŵ	EST PALM PEARA, FL	3340S	(95)	1502-5567	jpowers @myma	il.com	
Josh Powers		L .	in ca U	se of emergency notify: NAME "A MES POWERS				FRIATIONSHIP		
< M	•]		ADD S)	RESS (STREET, NUMBER, APT.) へMF AS ABOVら		CITY, ST	ate, Zip	TELEPHO)	-

A Document properties Search

You may also search for documents using full-text information. This can be used as the only method to search, or it can be combined with document properties. When searching for full text, every occurrence of the word or phrase you use to search will be highlighted when retrieving PDF documents. For more information on full-text searching, see <u>Appendix B</u>, <u>Advanced Search Syntax</u>.

content v6 Search		🗖 Fo	Iders	Capture	Search All Catalogs	💁 🛃 Admin	🔅 Options 🔒 Log	jout 🕜 Help	
Search by Packet	^	Ch	heck File Modify View @ Remove Sorting Results: 6 📧						
Full-Text Search 🛛 🔶				*Catalog	*DocType 📥	Student Name	Student ID	*DocName	
undergraduate			ŵ	Student Records	Application for Admission	Josh Powers	580-48-6030	Josh Powers - Application	
Search all versions			~	Student Records	Conduct Statement	Josh Powers	580-48-6030	Josh Powers - Conduct S	
Search			V	Student Records	Declaration of College	Josh Powers	580-48-6030	Josh Powers - Declaration	
Clear			V	Student Records	Enrollment Certification	Josh Powers	580-48-6030	Josh Powers - Enrollment	
Catalogs	≡		¥	Student Records	Fee Adjustment Request	Josh Powers	580-48-6030	Josh Powers - Fee Adjust	
Student Records			¥	Student Records	Grade Forgiveness Requ	Josh Powers	580-48-6030	Josh Powers - Grade Forg	
Document Types		Г	-					_	
Application for Admi		L	ι	JSF SOUTH FI	ITY OF Un ORIDA	dergraduate Applie	cation for Admissio	on • page 1 📃	
 Application for Resid Change of Address 		L		al NAME (LAST, FIRST, MIDDLE)	Shav	SOCIAL SECURITY NUN	BER 20140	2 7 9 3	
Conduct Statement 🗸	Conduct Statement								
		L	ADE	RESS (STREET, NUMBER, APT.)	r	c	Miami - Dade		
Student Name		L	ст 14	STATE, ZIP FL 33012	- HOME TE (305)	LEPHONE E- 40アーノ200 C	mail address	mailicom	
Josh Powers 💌			in c	se of emergency notify: NAME		Ri /-	LATIONSHIP		
<	>		ADD	RESS (STREET, NUMBER, APT.)	CITY, STA	TE, ZIP	TELEPHONE ()		

A Full-Text and Document properties Search

To search all versions of documents that match your search criteria, select the Search all versions checkbox.

content v6 Search] Fol	Iders	Capture	Search All 0	Catalogs 🕓 [, Admin 🛞 O	otions 🔒 Logo	out 🖗 Help
Search by Packet Check File Modify View Check File Modify View Remove Sorting Results Drag a column header here to group by that column.								Results: 14 🗷	
Full-Text Search 🛛 🔶				Version 🔻	*Catalog	*DocType	Student Name	Student ID	*DocName
			-	3.0	Student Records	Application for Admis	Josh Powers	580-48-6030	Josh Powers - Applic
Search all versions				2.0	Student Records	Application for Admis	Josh Powers	580-48-6030	Josh Powers - Applic
Search area			V	1.0	Student Records	Conduct Statement	Josh Powers	580-48-6030	Josh Powers - Cond
Clear			V	1.0	Student Records	Enrollment Certificati	Josh Powers	580-48-6030	Josh Powers - Enroll
Catalogs	≡			1.0	Student Records	Application for Gradu	Josh Powers	580-48-6030	Josh Powers - Applic
Student Records				1.0	Student Records	Application for Admis	Josh Powers	580-48-6030	Josh Powers - Applic
Document Types ✓ Fee Adjustment Rec ✓ Grade Forgiveness F		Γ	ι	JSF UNIVE	ERSITY OF I FLORIDA	Undergradu	ate Applicatio	n for Admissio	n • page 1
Privacy Request			LEG	AL NAME (LAST, FIRST, MIDD	LE) Short ye	SOC	IAL SECURITY NUMBER	20140	2793
Transcript Request			FOR	MER NAMES (list any first or	last names under which tran	scripts or other records may be	issued)		
		L	ADE	RESS (STREET, NUMBER, AP	HJ-		COUNTY	ni-Dade	
Student Name			CITY 14	alcah FL 330	272	HOME TELEPHONE (305)407-12	00 E-mail add	There by h	ail com
Josh Powers 💌			in ca	se of emergency notify: NAI	WE 1.2		Forthe	HIP Ch	
Otto a state in the state of			ADD	RESS (STREET, NUMBER, AP	T.)	CITY, STATE, ZIP	College	TELEPHONE ()	

Searching All Versions

To save your search query, select the **Save this search** checkbox, provide a **Saved-Search Title**, and select the \bigcirc Apply button. You can manage these saved searches from your options. See <u>Section 5.5</u>, "Saved <u>Searches</u>".

2. Searching by Packet

If one or more packet templates have been defined in the system, you will see a checkbox at the top of the search frame named, **Search by Packet**. Selecting this checkbox will present you with one or more packet templates you can search on. The key field will be displayed depending upon the packet template selected.

Enter the key-field value you are searching for, and select the search button to perform the search. All of the documents in the packet will be returned.

3. QuickSearch

The *QuickSearch* box in the right-center area of the main menu can be accessed from any location in Content Central. Enter your query in the *QuickSearch* box and the information provided will be used to search all document types where you have the search permission.

4. Saving Search Results

You may export the full list of search results, which may extend beyond the number of results displayed in the results grid, by selecting the **Save Results** menu item from the **File** menu. The data will be exported to an XML file based on the columns visible in the results grid. You will be provided with a dialog box to **Open** or **Save** the file to your local machine. Two fields, *DocFilename* and *DocPath*, will be included with each result, referencing the real filename and path to the document.



The Open/Save Dialog for Search Results

Chapter 4. Managing Documents

1. Introduction

Documents can be retrieved and managed in several ways using the File, Edit, Modify, View, and Approval Queue menus at the top of the results-grid frame. Some of these menus may not always be available.

content v6 Search		- Folders	Capture Search A	d Catalogs	Admin	Options	🔒 Logout 🕜 Hel	lp
Search by Packet	^	Check F	File Modify View Ø E-mail	Remove S	Sorting		Results: 1	2 💌
Full-Text Search 🛛 🔶			Fax	og	*DocТуре 📥	Student Nam	ne Student ID	
		🗹 👼	Download	ds	Application for Admission	Josh Powers	580-48-6030	
Search all versions			Zip & Save	ds	Application for Graduation	Josh Powers	580-48-6030	
Search			Start Approval Process	ds	Application for Residence	Josh Powers	580-48-6030	= =
Clear		Image: A state of the state	Send to Work Queue	ds	Change of Address	Josh Powers	580-48-6030	
Catalogs	≡		Save Results	ds	Conduct Statement	Josh Powers	580-48-6030	
Student Records			Delete	ds	Declaration of College	Josh Powers	580-48-6030	~
Document Types								
Conduct Statement Declaration of Colleg		US	SF UNIVERSITY OF SOUTH FLORIDA	L	Indergraduate Appl	lication for A	lmission • page 1	
Enrollment Certificat		LEGAL N	AME (LAST, FIRST, MIDDLE)		SOCIAL SECURITY N	UMBER SAR	48 6030	
Fee Adjustment Rec		FORMER	VERS JOSHUA MATINE NAMES (list any first or last names under which t	transcripts or o	other records may be issued)			
Clade Forgiveness F		ADDRESS S80	S (STREET, NUMBER, APT.) フーンショングレング BFACH Bとしつ	# 40	2	COUNTY PALM BEACH		
Student Name		CITY, STA WEST	T PALM AEATH, FL 33405	HOME (925	TELEPHONE MSDA-5367	E-mail address	mail.com	
Josh Powers 👻		in case of	emergency notify: NAME					
<	>	ADDRESS	S (STREET, NUMBER, APT.) F AS A BOVE	CITY, S	STATE, ZIP	(EPHONE)	-

The **File** Menu

2. Viewing a Document in the Browser

The default behavior when selecting a row in the results grid is to open the associated document in the preview area below the results grid. To change this behavior, see <u>Section 5.2</u>, "Preferences".

content v6 Search		🗆 Fol	ders	Capture	Search All Ca	italogs	Admin	Options	Logout 🕜 Hel	p
Search by Packet	^	Ch Dra	eck gao	File Modify ∨ column header here to gr	iew 🕖 Rer	nove Sortin	g		Results: 1	2 💌
Full-Text Search 🛛 🔶				*DocName	*Catalog		*DocТуре 🔺	Student Name	Student ID	
			2	Josh Powers - Application	Student Records	Ap	plication for Admission	Josh Powers	580-48-6030	
Search all versions			۵	Josh Powers · Application	Student Records	Ap	plication for Graduatio	Josh Powers	580-48-6030	
Search Olan			V	Josh Powers - Application	Student Records	Ap	plication for Residenc	Josh Powers	580-48-6030	
Clear			~	Josh Powers - Change of	Student Records	Ch	ange of Address	Josh Powers	580-48-6030	
Catalogs	≡		V	Josh Powers - Conduct 9	Student Records	Co	induct Statement	Josh Powers	580-48-6030	
Student Records			V	Josh Powers · Declaratio	Student Records	De	claration of College	Josh Powers	580-48-6030	
Document Types		Г								
Conduct Statement		L	ι	JSF SOUTH F	LORIDA	Unde	ergraduate Appl	ication for Adm	ission • page 1	
Enrollment Certificat		L .								
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Grade Forgiveness F		L .	FOR	MER NAMES (list any first or last na	mes under which transc	ipts or other re	cords may be issued)			
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Josh Powers 💌			in ca	se of emergency notify: NAME		1-100	- 300 /	RELATIONSHIP		
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A PDF Document Viewed in the Web Browser

3. Streaming a PDF Document

If your administrator has enabled **PDF Streaming**, only the first page of PDF files will be sent to the preview area. The top of the image will include a watermark indicating **PDF Streaming Enabled** and the page number(s) that you are viewing from the original.

To view other pages, select one of the menu items from the **PDF Streaming** menu located above the results grid. You can move forward and backward and also select a specific range of pages to view. To download the original file in the preview area, select **Show Full-Page Original** from the menu.



Streaming a PDF Document

4. Downloading Documents

When a browser plugin doesn't exist for the document you've retrieved, you will be provided with a dialog box to **Open** or **Save** the document to your local machine. You can also access this dialog by selecting the **Download** menu item from the **File** menu.

File Download 🛛 🛛 🔀								
Do you want to open or save this file?								
Ror	Name: Josh_PowersApplication_for_Admission.pdf Type: Adobe Acrobat 7.0 Document, 362KB From: localhost							
0	Upen Save Lancel While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?							

The Open/Save Dialog for a Single Document

To save multiple documents, select the checkbox in each document row, and select the **Zip & Save** menu item in the **File** menu.



The Open/Save Dialog for Multiple Documents

5. E-mailing Documents

You may send one or more documents in the results grid to one or more e-mail recipients by selecting the **E-mail** menu item from the **File** menu. When the **E-mail Document(s)** dialog appears, you may select an available message template from the drop-down list in the top right of the dialog (if visible), or manually add the recipient(s)' *E-mail Address(es)*, a *Subject* line, and an optional *Message*.

Selecting the **To:** or **CC:** buttons will load your address book. Use this list of contacts to quickly add recipients to your e-mails. After you have selected one or more recipients from the list, select the **To:** or

CC: buttons to queue the recipients. When you are satisfied with your selections, select the ADDV button to add them to your e-mail. For information on managing your address book, see <u>Section 5.4</u>, "Address Book".

When your e-mail is complete, select the send button. Recipients are automatically saved to your address book when you send an e-mail.

🏉 Email Document(s) - Windows Internet Explorer		. 🗆 🗙
E-mail Document(s)) Help
Send Close From.Mark Thomas Enter one or more e-mail addresses separ To: srobinson@mydomain.com CC: Subject Application We Discussed Attachment(s) < Josh Powers - Application for Admission Zip Attachment(s) Zip file name Josh Powers - Application for Admission. Message: Soctt,	Select Template ated by a semicolon.	
I've attached the application you wanted to if you need anything else. - Mark	review. Let me know	×
Done 🥞 La	cal intranet 🔍 10	0% • ,;;

Sending Documents via E-mail

🥖 Address Book - Windows Internet Explorer 🛛 📃 🔯							
Address Book 🕜 Help							
cm@ademero.com, Cindy Morgan, Ademero hm@ademero.com, Herb Mylett Ademero jr@ademero.com, Jim Riley, Ademero jc@ademero.com, Jorge Cruz, Ademero sb@ademero.com, Sandra Brown, Ademero							
To: hm@ademero.com;jr@ademero.com							
Close							

Address Book for E-mailing

6. Faxing Documents

You may send one or more documents in the results grid to one or more fax recipients by selecting the **Fax** menu item from the **File** menu. When the **Fax Document(s)** dialog appears, you may select an available message template from the drop-down list in the top right of the dialog (if visible), or manually add the recipient(s)' *Fax Number(s)*, an optional *Recipient Name* and *Company*, a *Subject* line, and some optional *Message Text*.

Selecting the **To:** button will load your address book. Use this list of contacts to quickly add recipients to your faxes. After you have selected one or more recipients from the list, select the **To:** button to queue the

recipients. When you are satisfied with your selections, select the \bigcirc Apply button to add them to your fax. For information on managing your address book, see Section 5.4, "Address Book".

Select the send button when finished. Recipients are automatically saved to your address book when you send a fax.

Fax Document(s)	🕜 Help
Send Close Select Template From:Mark Thomas Enter one or more fax numbers separated by a semicolon. To: Cindy Morgan Fax Number(s): 863-582-9438 Company: Ademero Subject: Application We Discussed Attachment(s): Josh Powers - Application for Admission.pdf> Message: Message:	×
Cindy, Here's the application you wanted to look at. Let me know i need anything else. - Mark	f you
Done 😏 Local intranet	🔍 100% 🔹 🛒

Sending Documents via Fax

🍘 Address Book - Windows Internet Explorer 🛛 🖃 🖾
Address Book 🕜 Help
Cindy Morgan, Ademero, 863-582-9438 Herb Mylett, Ademero, 863-582-9438 Jim Riley, Ademero, 863-582-9438 Jorge Cruz, Ademero, 863-582-9438 Sandra Brown, Ademero, 863-582-9438
To: 863-582-9438 To Cindy Morgan Company Ademero
Close

Address Book for Faxing

7. Appending to a Document

To append additional pages to an existing document, you will need to first locate the document. When the document is in your results grid, select the appropriate row and select the **Append** menu item from the **Modify** menu. You can append to the document using DirectScanTM, QCardTM, or **Electronic Upload** by selecting the appropriate menu item.

7.1. Appending by DirectScanTM

The DirectScan[™] applet will launch in a new window. Use this applet to append pages to the document by scanning additional pages. For more information, see <u>Section 1.5</u>, "Using The DirectScan[™] Applet".

Ge AppendReplaceDocument - Windows Internet Explorer	
Append to Josh Powers - Application for Admission.p	odf 🕜 Help
Scanner: XPCTWAIN TIFF/JPEG Scanner 🕑 😰 Scan 🗌 Hide Scan Dialog	Settings
Com In Zoom Out CRotate Move Move O Delete C	Delete All
Viewing 1 - 3 of 3	Next Set
[Finish
Done	Scolal intranet 🔍 100% 👻 🛒

Appending using DirectScanTM

7.2. Appending by QCardTM

A new window will appear containing an *Append Document* QCardTM. Print this QCardTM, place it on top of the additional pages, and scan the document. Content Central will create a new version of the document containing the pages from the most-recent version combined with the scanned pages.

🧀 http://dms/ContentCentral/Actions/AppendReplaceDocument.aspx?append=1 🝙 🗖 🔀						
🖶 🗒 🖃 M 🧇 💠 M 1 / 1 🔜 🔮 🕙 💿 62.8% -						
User: MThomas Catalog: Student Records: Document Type: Application for Admission Accool						
00000413						
Append: Josh Powers - Application for Admission_CCv0004.pdf	~					
Done Unknown Zone	.::					

An Append Document QCardTM

7.3. Appending by Electronic Upload

When the **Append** window appears, **Browse** to the file containing the additional pages and select the **Support** button.

€ AppendReplaceDocument - Windows Internet Explorer	_ 🗆 🔀
Append to Josh Powers - Application for Admission.pdf	🕜 Help
Browse for image file (tiff, jpeg, gif, png, bmp, pdf)	
C\Documents\Josh Powers - Application for Admission.pdf	Browse
Close	
ope	100% •

Appending using Electronic Upload

8. Replacing a Document

To replace the current version of an existing document, you will need to first locate the document. When the document is in your results grid, select the appropriate row and select the **Replace** menu item from the **Modify** menu. You can replace a document using DirectScanTM, QCardTM, or **Electronic Upload** by selecting the appropriate menu item.

8.1. Replacing by DirectScanTM

The DirectScan[™] applet will launch in a new window. Use this applet to replace the document by scanning new pages. For more information, see <u>Section 1.5</u>, "Using The DirectScan[™] Applet".

AppendReplaceDocument - Windows Internet Explorer	_ 🗆 🔀
Replace Josh Powers - Application for Admission.pdf	🕜 Help
Scanner: XPCTWAIN TIFF/JPEG Scanner 💌 💽 Scan	Settings
Com In Zoom Oul C Rotate Move Delete Delete Al	
<form></form>	
Viewing 1 - 3 of 3	Next Set
	Finish
Done Stocal intranet	🔍 100% 🔹 💡

Replacing using DirectScanTM

8.2. Replacing by QCardTM

A new window will appear containing a *Replace Document* QCardTM. Print this QCardTM, place it on top of the new set of pages, and scan the document. Content Central will create a new version of the document containing only the pages scanned.



A Replace Document QCardTM

8.3. Replacing by Electronic Upload

When the **Replace** window appears, **Browse** to the new file and select the *Wolad* button.

AppendReplaceDocument - Windows Internet Explorer	_ 🗆 🛛
Replace Josh Powers - Application for Admission.pdf	🕜 Help
Browse for image file (tiff, jpeg, gif, png, bmp, pdf)	
C\Documents\Josh Powers - Application for Admission.pdf	Browse
Opload Octose	
Done Second S	🔍 100% 🔹 🛒

Replacing using Electronic Upload

9. Editing Documents

Documents can be edited easily using native applications on your Microsoft® Windows® workstation. This requires the *Content Director* application installed on your local computer.

Note

It's possible to edit documents without the *Content Director* by manually checking-out, downloading, editing, and checking-in the documents. For more information, see <u>Section 16</u>, <u>"Checking Out/Checking In Documents"</u>.

The *Content Central Office Integration* application can be installed on any workstation containing Microsoft® Office® to further assist in the document capture and editing process within applications like Word®, Excel®, and Outlook®.

Note

Both *Content Director* and *Content Central Office Integration* are client-side applications, and each must be installed on user workstations where their functionality is desired.

9.1. Content Director

The *Content Director* is responsible for directing documents and other content between the Content Central server and your local computer.

9.1.1. Installation

The installation package for the Content Director application can be accessed from the Options area by

selecting the selecting the button on the main menu followed by selecting the icon for **Downloads and Installers**.

Note

The Content Director application runs on only the Microsoft® Windows® platform.

Select *Download Content Central Content Director* to download and/or begin the installation package. Follow the prompts to complete the installation.

The installation package will automatically configure your computer to launch the *Content Director* each time your computer is started. This default behavior can be changed in the settings dialog.

9.1.2. Settings

You can access the settings of the *Content Director* by locating the icon in the system tray of your Windows® application bar and right-clicking it followed by selecting the **Settings** menu item.

🖷 Settings - Content Director	
Local Document Folder:	
D:\E dit	
Port: 54986 🐑	
Do not show informational balloon tips	
Check for updates	
Run at Windows startup	
	OK Cancel

The Content Director Settings Dialog

The **Local Document Folder** points to a location on your local computer that will temporarily store documents while they are being edited. When an edited document has been uploaded to the server, the *Content Director* will automatically remove it from this location.

The **Port** setting determines the local Windows® port that will be used for communication to and from the server.

You may select the checkbox labeled **Do not show informational balloon tips** if you do not wish to see notices of downloads and uploads. You may also choose whether the application will automatically **Check for updates** and **Run at Windows startup**.

When you have finished making changes, select the **OK** button to close the settings dialog.

9.2. Content Central Office Integration

The *Content Central Office Integration* application (*CCOI*) integrates with your implementation of Office® 2003, 2007, 2010 32-bit, or 2010 64-bit in the form of a custom toolbar that communicates with the Content Central server.

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Elle Edit View Insert Format Iools Table Window Help Adobe PDF Acrobat Comments Type a question for help 🔸 🗙									
🗋 📴 属 👌 🎒 🎒 🐧 🗮 🖏 🕹 🛍 🏈 🍼 • 🗠 • 🧶 😏 🖽 🖼 🐺 🖏 🖓 🗐 💶 100% 💿 🎯 🛱 Read 💂									
44 Date and Numb 🗸 Trebuchet MS	• 8 • B / U 三 三 🗐 🗮 🗐 • 汪 汪 淳 淳 🖽 • 🕙 •	A • 📮 🥒 🥒 🥙 • 🛛 🔍 📮							
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Southsic	de Manufacturing, Inc. PURCHA	ASE ORDER							
- 1100 Commerci Phone 754-890-	sial Blvd., Hollywood, FL 33020								
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954-5	-502-5570 Hollywood, FL 3	3020							
	754-890-5001 Customer ID S16	795							
- QUOTE	QUOTE SHIPPING METHOD SHIPPING TERMS DELIVERY DATE								
. 4800 Ground June 5, 2009									
		•							
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Page 1 Sec 1 1/1 A	At 1.4" Ln 0 Col 3 REC TRK EXT OVR English (U.S 🕼								

CCOI in Word® 2003

9.2.1. Settings

You can access *CCOI* settings by clicking the **Settings** button on the *CCOI* toolbar within your Office® application. This should be accessed the first time *CCOI* is used.

Service Locations	<i>CCOI</i> connects to the Content Central server using Web services. The service locations can be entered in one of two ways.					
	Auto Discover Service URLs	In most cases, you can provide the URL to Content Central (example http://servername/ContentCentral) and <i>CCOI</i> will automatically determine the service locations.				
	Manually Configure Services	The services may need to be entered manually if the server configuration has been customized.				
	Select the Test Services button to	Select the Test Services button to verify the service locations entered are valid.				
Log in	You must provide your Content Central login information for <i>CCOI</i> to authenticate with the Content Central server. Select the Test Log In button to verify these entries					

You may select the checkbox labeled **Notify when working on Read Only files** if you wish to see notices when opening a document that cannot be edited. You may also choose whether the application will **Use temporary folder for new and read only files**. When this option is checked, the application will automatically save new documents to a temporary folder prior to uploading them to Content Central. These files will be automatically deleted when the application is closed.

When you have finished making changes, select the **Save Settings** button to save the settings and close the dialog.

SettingsWindow								
		Settings						
	_	-						
Service Locati	ions							
 Auto Discover 	r Service Urls							
Conten	t Central URL	http://dms/ContentCentral						
Manually Con	figure Service:	3						
Transfer								
Web								
		Test Services						
Log in								
Domain	<none></none>							
User Name	mthomas							
Password	••••							
	Test Log In							
Notify when working on Read Only files								
Use temporary for	Use temporary folder for new and read-only files							
		Save Settings Cancel						

CCOI Settings Dialog

9.2.2. Capturing New Documents

You can capture any Office® document that has not been previously captured by selecting the **Capture New** button on the toolbar. The **Check-In** dialog will launch, allowing you to choose the appropriate destination and document properties for the document.

Note

To capture e-mails using Outlook®, select the **Capture emails to Content Central** menu item from the **Content Central** menu.

Destination

This selection determines whether the document will be sent directly to a **Catalog** or to the *Coding Queue* for review.

	Catalog	The document will be routed to the selected Catalog . Any required document properties must be provided before you can Upload . These document properties are indicated with bold text.
	Personal Coding Queue	The document will be routed to the <i>Coding Queue</i> , visible only to you.
	Shared Coding Queue	The document will be routed to the <i>Coding Queue</i> , visible to you and others with permission to add documents for the document type selected.
Catalog and Document Type	Select an appropriate Catalog document. These selections can	and Document Type for the be changed later in the <i>Coding</i>

Queue when the **Destination** is set to **Personal Coding Queue** or **Shared Coding Queue**.

Document Properties Enter appropriate document properties for the document. Any required fields are indicated with bold text. All fields are optional when the **Destination** is set to **Personal Coding Queue** or **Shared Coding Queue**.

When all selections have been made, select the **Upload** button to route the document to the Content Central server. You will be prompted to save the file locally if it has not been saved and you have not chosen to use a temporary folder (see <u>Section 9.2.1, "Settings</u>").

Content Central Check In 🛛 🔛
Destination
Catalog 💌
Catalog
Accounts Payable 💌
Document Type
Purchase Order 💌
PO
8000
PODate
05/22/2009
Quote
4800
Vendor
Powers and Associates
Upload

CCOI Check-In Dialog

9.2.3. Checking Out a Local Document

If you've loaded an Office® document outside of the Content Central Web application and the document has been previously added to Content Central, you can check out the document by selecting the **Check Out** button on the *CCOI* toolbar. This will notify other users in Content Central that you are editing the document.

9.3. Editing a Document

To edit a document, select the results-grid row of a document to modify followed by the **Edit Document** menu item from the **Modify** menu. The document will be checked-out from the system automatically and routed to your local machine via the *Content Director*. Once the file has been downloaded, its native application will launch and load the document.

After modifications have been completed, the document needs to be uploaded to the document server.

9.4. Uploading Changes using CCOI

Use this method of uploading if your document is a Microsoft® Office® document and you have installed *CCOI*.

After making necessary changes to the document, select the **Update Document** button on the *CCOI* toolbar. The new version will be uploaded, and the document will be checked in if previously checked out.

9.5. Uploading Changes without using CCOI

After making necessary changes to the document, close the application, making sure to choose **Yes** when asked if you would like to save the changes. The *Content Director* will provide a dialog allowing you to choose your preferred action.

Select the appropriate action, and select the **OK** button to complete the editing process. If you have chosen to upload the local copy, the *Content Director* will send the modified document to the server and perform an automatic check in.



The Content Director Upload Dialog

10. Editing Document Properties

If you would like to view or modify document properties for a document, select the results-grid row of a document to modify followed by the **Document Properties** menu item from the **Modify** menu. Your left frame will disappear and the right frame containing the **Document Properties** will appear.

If any key icons are displayed next to a field, you may select the **Perform key-field lookup** link to perform a real-time field lookup. One or more of the fields will be updated.

If a **Use Filing Rules** checkbox is presented, you may choose whether or not the updated field information will cause the document folder and file name to also update.

When changing the document type, you will not be able to modify the fields until the document has moved.

Make the necessary changes to the document properties and then click when finished.

Note

System fields appear below the *commu* button and are presented for informational purposes only.

co	nter cen	nt) v6 tral.	Search 🔁	Folders [🔁 C	apture	Search All Catalo	ogs 🕓 🐍	Admin	Optio	ns 🔁 Logout 💿 Help
Ch Dre	eck gao	File Edit	Modify Vie re to group by tha	ew 🕖 t column.	Drop file(s) .	here to upload		Docs: 12	×	Document Properties
		Document	Catalog	Document Typ	File Size	Date Modified	Student Name	Student ID		Catalog:
	٨	Josh Powers - Ap	Student Records	Application for Ac	356,146	8/28/2009 4:19:0	Josh Powers	580-48-6030		Student Records
		Josh Powers - Ap	Student Records	Application for Gr	129,839	8/28/2009 4:19:(Josh Powers	580-48-6030	=	Document Type:
	V	Josh Powers - Ap	Student Records	Application for Re	162,551	8/28/2009 4:19:0	Josh Powers	580-48-6030		Application for Admission 🗙
	V	Josh Powers - Ch	Student Records	Change of Addre:	69,511	8/28/2009 4:19:0	Josh Powers	580-48-6030		
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	ι	JSF SOUT	VERSITY OF TH FLORIDA	Unde	rgraduate A	pplication fo	r Admission	• page 1		Student ID S80-48-6030 Preview key-field lookup
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The Document Properties Frame

11. Viewing Document Version History

Content Central keeps track of document revisions and changes. The current version of a document will always be displayed in results grids. To view all versions of a document, select the **Document History** menu item from the **View** menu.

The number to the left of the decimal is the *Major Version*. The number to the right of the decimal is the *Minor Version*. The following table outlines how versions are generated.

Major Version Added Added as Copy Moved Checked In Appended Replaced Uploaded Revision Minor Version **Properties Updated Begin Approval Process** Approved Voted for Approval Rejected End Approval Process Set Priority Added/Updated Retention Policy Removed Retention Policy

🏉 D	🖉 Document Version History - Windows Internet Explorer								
	History of [Charles Jones - Application for Admission]								
Che	eck	File	Modify 🧭				Versions: 5 💌		
Dra	g a col	umn h	eader here to group by that column.						
		v	File	User	Action	Details	Date Created		
	٩	1.4	Charles Jones - Application for Admission.pdf			[Admission Approval] Document moved forward from [Faculty] to [MThomas]. Approval performed and requirement (Single) bypassed by administrator. Note: Ths issue has been resolved.	8/28/2009 9:28 PM		
	٩	1.3	Charles Jones - Application for Admission.pdf	MThomas	Rejected	[Admission Approval] Document moved backward from (MThomas) to (Faculty). Note: Please check the address.	8/28/2009 9:28 PM		
	٩	1.2	Charles Jones - Application for Admission.pdf	MThomas	Approved	[Admission Approval] Document moved forward from [Facully] to (MThomas). Approval performed and requirement (Single) bypassed by administrator. Note: Please check the address.	8/28/2009 9:10 PM		
	٩	1.1	Charles Jones - Application for Admission.pdf	MThomas	Begin Approval Process	[Admission Approval] Approval Process initiated. Note: Please note the address.	8/28/2009 9:08 PM		
	٩	1.0	Charles Jones - Application for Admission.pdf	Content Central	Added		8/28/2009 1:18 PM		
	Close								
Done						🧐 Local intranet	🔍 100% 🔹 💡		

Viewing Document Version History

12. Viewing a Packet

Packets are collections of documents that share a key-field value. One or more packet templates can be defined by your administrator and used to link these related documents together in a packet. To view other documents linked to the currently selected document, select the **Packet** menu item from the **View** menu. When more than one packet exists for the source document, you can choose the packet to view by selecting the appropriate packet template from the drop-down menu in the header.

An informational message appears to the right of the menu indicating whether the packet is **Complete** or **Incomplete**. When a packet is incomplete, rows representing the missing document types will appear at the end of the current page of packet documents.

Student Packet [Student ID = 580-48-6030] Check File Modify View Packet is Complete Docs: 12 Drag a column header here to group by that column. V Colspan="2">Occument Catalog Document Type Date Modified Student Name Student ID V Pag a column header here to group by that column. Document Catalog Document Type Date Modified Student Name Student ID V Pag a column header here to group by that column. Valuent Records Application for Graduator 8/28/2009 41:907 PM Josh Powers - Application Student Records Application for Graduator 8/28/2009 41:907 PM Josh Powers - S80:48:6030 V Josh Powers - Application Student Records Change of Address 8/28/2009 41:907 PM Josh Powers - S80:48:6030 V Josh Powers - Change of Student Records Conduct Statement 8/28/2009 41:907 PM Josh Powers - S80:48:6030 V Josh Powers - Declaratior Student Records Conduct Statement 8/28/2009 41:907 PM Josh Powers - S80:48:6030 V Josh Powers - Enrolment Student Records Conduct Statement 8/28/2009 41:907 PM Josh Powers - S80:48:6030 V Josh Powers - Enrolment Student Records Enrolment Certification 8/28/2009 41:907 PM Josh Powers - S80:48:6030 V Josh Powers - Fee Adjust Student Records Errolment Certification 8/28	🥖 Packet Documents - Windows Internet Explorer 📃 🔲 🔀						
Check File Modify View Packet is Complete Docs: 12 Drag a column header here to group by that column.	Student Packet [Student ID = 580-48-6030]						
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✓ Josh Powers - Transcript F Student Records Privacy Request 8/28/2009 4:19:07 PM Josh Powers 580-48-6030 ✓ ✓ Josh Powers - Transcript F Student Records Transcript Request 8/28/2009 4:19:07 PM Josh Powers 580-48-6030	📋 🖌 Josh Powers - Late Re	gisl Student Records	Late Registration Waiver	8/28/2009 4:19:07 PM	Josh Powers	580-48-6030	
Josh Powers - Transcript F Student Records Transcript Request 8/28/2009 4:19:07 PM Josh Powers 580-48-6030	📋 🖌 Josh Powers - Privacy	Re Student Records	Privacy Request	8/28/2009 4:19:07 PM	Josh Powers	580-48-6030	
	📋 🧔 Josh Powers - Transcr	pt F Student Records	Transcript Request	8/28/2009 4:19:07 PM	Josh Powers	580-48-6030	
					£1	Close	

Viewing a Packet

13. Renaming a Document File Name

To rename a document file name, select the **Rename** menu item from the **Modify** menu.

Provide a **New Name** for the file. Select the *Apply* button to rename the file.

<i>6</i> Rename Document - Window	vs Internet Explorer	
	Rename Document	🕜 Help
Josh Powers - Applica	ation for Admission.pdf	
New Name:		
Josh Powers - Application fo	or Admission.pdf	
Apply 🚫 Close		
Done	Succal intranet	🔍 100% 👻 🛒

Renaming Documents

14. Deleting Documents

To delete one or more documents in your results grid, add a check to each row of the documents you would like to delete. When deleting only one document in your results grid, select that row.

Note

If you wish to delete multiple documents and the selected row does not contain a check in its checkbox, Content Central will only delete that selected row's document.

Once you've selected and/or checked the appropriate row(s), select the **Delete** menu item from the **Document Actions** menu. The **Delete Document(s)** dialog will appear.

Review your selections, then select the Delete button if you wish to continue. The documents will be removed from the system and the **Delete Document(s)** dialog will close.

Gelete Document - Windows Internet Explorer	🛛
Delete Document(s)	🕜 Help
Josh Powers - Application for Admission.pdf -Allowed- Josh Powers - Declaration of College.pdf -Allowed- Josh Powers - Enrollment Certification.pdf -Allowed- Josh Powers - Transcript Request.pdf -Allowed-	
Note: All versions for each listed document will be deleted.	
Done 🧐 Local intranet	at 100% 🔹

Deleting Multiple Documents

15. Uploading Revisions

To upload a revision, select the Upload Revision menu item from the Modify menu.

Browse to the local file for each document you want to upload as a revision. After choosing your files, select the select the button to begin the upload process. A new version will be created for each uploaded document.

🥖 Upload Revision - Windows Internet Explorer	🛛
Upload Revised Document(s)	🕜 Help
☑ Alisa Martinez - Application for Admission.pdf	
	Browse
Charles Jones - Application for Admission.pdf	
	Browse
✓ Josh Powers - Application for Admission.pdf	
	Browse
✓Katherine Potter - Application for Admission.pdf	
	Browse
Couplead Close	
Done Social Intranet	€ 100% ·

Uploading Revised Documents

16. Checking Out/Checking In Documents

16.1. Checking Out Documents

When you need to make changes to the content of one or more documents in your results grid, add a check to each row of the documents you would like to check out. When checking out only one document in your results grid, select that row.

Note

If you wish to check out multiple documents and the selected row does not contain a check in its checkbox, Content Central will only check out that selected row's document.

Once you've selected and/or checked the appropriate row(s), select the **Check Out/In** menu item from the **Modify** menu. The **Check Out/In Document(s)** dialog will appear.

Review your selections, then select the *Check Out* or *Download* button if you are satisfied. The **Check Out**/ **In Document(s)** dialog will reload and those documents that were checked out will allow you to *Check In* the documents or *Out* the check out process.

Note

Multiple documents will be compressed into a ZIP file for download.



Checking Out Multiple Documents

If any of the documents you selected for check-out were already checked out by another user, you may request that those documents be checked in. You can send a notice to both the user and administrators.



Requesting Documents to be Checked In

If you do not have permission to check out any of the selected documents, you will receive a message listing those documents. You will not be able to check out those documents.

ℰ Check Out/In Document(s) - Windows Internet Explorer	
Your permissions do not allow you to check out the following.	🕜 Help
Josh Powers - Application for Admission.pdf Josh Powers - Declaration of College.pdf Josh Powers - Enrollment Certification.pdf Josh Powers - Transcript Request.pdf	
Close	
Done Succel intranet	Q 100% •

Attempting to Check Out Documents Without Permission

16.2. Checking In Documents

After you've finished modifying documents, you may upload the new file(s) back to Content Central. The easiest way to accomplish this is by accessing these checked-out documents from your **Folders** frame.

Access the **Folders** frame by selecting the **Folders** button from the main menu.



The Folders Frame

Select the *icon* in the **Folders** frame to obtain the list of documents you currently have checked out.

content 26 Search	Folder	s	Capture	Search All Cata	alogs 🕓 🔒 A	dmin 🛞 Optic	ns 🔒 Logout	Help
	Ch	eck	File Modify	View Ø				Docs: 4 💌
Messages	Dra	gac	Decument	o group by that colu	Decument Tune	Date Checked 0	Ctudent Name	Student ID
Ghecked Out		~	Josh Powers - Appli	Student Becords	Application for Admi	8/28/2009 8:53:57	Josh Powers	580-48-6030
		~	Josh Powers - Deck	Student Records	Declaration of Colleg	8/28/2009 8:53:57	Josh Powers	580-48-6030
Approval Queue		4	Josh Powers - Enrol	Student Records	Enrollment Certificati	8/28/2009 8:53:58	Josh Powers	580-48-6030
		~	Josh Powers - Trans	Student Records	Transcript Request	8/28/2009 8:53:58	Josh Powers	580-48-6030
🛁 Work Queue								
Coding Queue	L	U	SF SOUTH	RSITY OF FLORIDA	Undergradua	te Application	for Admission	• page 1
Custom Policies	L	LEGA Po FORM	L NAME (LAST, FIRST, MIDDL) いビア、エスタイン ER NAMES (list any first or la	E) <u>A MATTHEW</u> st names under which trans	SOCIA cripts or other records may be is	L SECURITY NUMBER	80 48 6	030
Catalog Browser	L		ess (street, number, apt.	ACH BLUD ,	4402	PALM B	FACH	
		Wé	ST PALM AENA, 1	2 3340S	195 4502-5587	poweb	@mymail.com	
			MES POWERS ESS (STREET, NUMBER, APT.) ME AS A BOUG	-	CITY, STATE, ZIP	FATHER	TELEPHONE	
ADEMERO		NATIO	IN OF CITIZENSHIP		IF YOU ARE A PERISTRATION	RMANENT IMMIGRANT, ATTA	CH A PHOTOCOPY OF YOUR	ALIEN
		u FEN		DATE OF BIRTH	02 120 183	NATIVE LANGUAGE	oldSH	·····

The Checked Out Document List

Just as before when checking out documents, add a check to each row of the documents you would like to check in. When checking in only one document in your results grid, select that row.

Once you've selected and/or checked the appropriate row(s), select the **Check Out/In** menu item from the **Modify** menu. The **Check Out/In Document(s)** dialog will appear.

Review your selection(s), then browse to each document location on your local machine.

Select the Checkin button when you are ready to upload the modified documents. The **Check Out/In Document(s)** dialog will reload after uploading completes, and those documents that were checked in will now be allowed for check-out once more. If you are finished, close the **Check Out/In Document(s)** dialog.

🟉 Check Out/In Document(s) - Windows Internet Explorer	_ 🗆 🔀
Check In Document(s)	🕜 Help
Josh Powers - Application for Admission.pdf	
	Browse
☑ Josh Powers - Declaration of College.pdf	
	Browse
✓ Josh Powers - Enrollment Certification.pdf	
	Browse
☑ Josh Powers - Transcript Request.pdf	
	Browse
🐼 Check In 🕑 Undo 🕜 Download 🕢 Close	
Done 🧐 Local intranet	🔍 100% 🔹 💡

Checking In Multiple Documents

17. The Approval Queue [Enterprise Edition]

Your **Approval Queue** contains documents or packets that have been routed to you based on an approval process. Access it by first selecting the Folders button from the main menu followed by the a icon from the **Folders** frame.

Icons displayed in the Approval Queue are as follows:

- Document or packet is a new arrival to the approval process.
- Document or packet has been approved.
- Q Document or packet has been rejected.

To narrow your view by catalog or document type, select from the drop-down list at the top of the results frame.

After you've performed your designated task(s) related to a document or packet, you can either **Approve** it or **Reject** it from the **Approval Queue** menu. One or more documents and packets can be approved or rejected at the same time.

Note

You may be able to select only the first item in the queue. This is an administrator preference.

If you have permission to set priorities, you may select the **Set Priority** menu item from the **Approval Queue** menu.

Most documents or packets arrive on an approval process because they match certain criteria during the capture process or match criteria in a workflow rule; however, it's sometimes necessary to manually place an existing document or packet on an approval process. To accomplish this, select one or more documents or packets from your results grid, and then select the **Start Approval Process** menu item from the **File** menu.

When you are viewing a packet, you may choose the **Start Packet Approval Process** menu item from the **File** menu to assign the packet to an approval process.

conten 76 Search Capture Search All Catalogs 😱 🐣 Admin 🐼 Options 🔒 Logout 💿 Help								
	Check File Modify View Approv	l Queue 🕖 Admin Que	ue Doc	:s: 3 💌				
Messages	Drag a column header here to group by that column							
	Document	Priority Deadline	Received from Note from Sende	er Nexth				
Checked Out	🔽 😨 Charles Jones - Application for Admission.pd		Faculty (Group) Please check the address.	You are				
	🔲 🔲 😱 Katherine Potter - Application for Admission.	df 5 23 Hours 43 Min	Faculty (Group) Review the date.	You are				
Approval Queue	Pamela Troy - Application for Admission.pdf	5 23 Hours 43 Min	s Faculty (Group) This looks good.	You are				
🚰 Work Queue				>				
Coding Queue	UNIVERSITY OF SOUTH FLORIDA	Undergraduate Applic	ation for Admission • page 1	Ê				
	LEGAL NAME (LAST, FIRST, MIDDLE)	SOCIAL SECURITY NUM	BER 420126852					
Catalog Browser	FORMER NAMES (list any first or last names ender which transcripts or other records may be issued)							
	ADDRESS (STRET, NUMBER APT) 4980 1744 SA N. BROWARD							
	Davie, FL 338/2	St)433-3421 c	joues & hymail.com					
	Javaes Javes	RE	ather					
	ADDRESS (STREET, NUMBER, APT.) CI SAME AS A BOVE	Y, STATE, ZIP	TELEPHONE ()					
	NATION OF CITIZENSHIP	•IF YOU ARE A PERMANENT IMMIN REGISTRATION CARD.	GRANT, ATTACH A PHOTOCOPY OF YOUR ALIEN					

The Approval Queue

17.1. Approving

You can provide a note for the next user or completion of the process for each item you are approving.

If you are presented with a **Send to user** drop-down list, select one user from the list to be the recipient of the item.

If you are presented with a **PIN Required** message, you must provide your personal identification number, which can be defined in your options. See <u>Section 5.8</u>, "PIN" for more information.

Confirm your selections and select the Approve button to move the item(s) forward on the approval process. The item(s) will be removed from your *Approval Queue*.

Approval-Proces	ss Actions - Windows Internet Explorer	
	Approve Document(s)	🕜 Help
Charles J Process: Ad	ones - Application for Admission.pdf dmission Approval	
Note: (250 chars max)	Please check the address.	<u>^</u>
✓ Katherine Process: Ad	Potter - Application for Admission.pdf dmission Approval	
Note: (250 chars max)	Review the date.	<u>∧</u>
Pamela Ti Process: Ad	roy - Application for Admission.pdf dmission Approval	
Note: (250 chars max)	This looks good.	
Approve	Close	
ne	Second intranet	at 100% 🔹

Approving

17.2. Rejecting

You can provide a note for the previous user or completion of the process for each item you are rejecting.

If you are presented with a **Send to user** drop-down list, select one user from the list to be the recipient of the item.

If you are presented with a **PIN Required** message, you must provide your personal identification number, which can be defined in your options. See <u>Section 5.8</u>, "PIN" for more information.

Confirm your selections and select the Reject button to send the item(s) backward on the approval process. The item(s) will be removed from your *Approval Queue*.

C Approval-Process Actions - Windows Internet Explorer	
Reject Document(s)	🕜 Help
Charles Jones - Application for Admission.pdf Process: Admission Approval	
Note: (250 chars max)	<u>~</u>
Katherine Potter - Application for Admission.pdf Process: Admission Approval	
Note: Please review the date.	
Pamela Troy - Application for Admission.pdf Process: Admission Approval	
Note: (250 chars max)	~
Done 😒 Local intranet	🔍 100% 🔻 🛒

Rejecting

17.3. Assigning to an Approval Process

If one or more items to assign are the primary document type for one or more packets, you may choose whether the **Assignment Type** is for only the **Document** or for the entire **Packet**. If the **Packet** option is selected, choose a packet from the accompanying list. You can select the **View Packet** link to view all documents in the selected packet.

Select the appropriate approval process for each document you've chosen for assignment. You may optionally set the priority for the item and provide a note for the first member in the approval process. If you are presented with a **Send to user** drop-down list, select one user from the list to be the recipient of the item.

After confirming your selections, select the Assign button. The item(s) will be placed on the respective approval process.

Approval-Process Actions - Windows Internet Explorer	
Assign Document(s) to Approval Process	🕜 Help
Charles Jones - Application for Admission.pdf Assign to Admission Approval Priority 5 Note: Place contact his student and obtain mission info	
(250 chars max)	M
Assign to Admission Approval Priority 5 Note: Please check the address.	
(250 chars max)	<u>×</u>
Assign to Admission Approval Priority 5	
Note: Please contact the student for previous school history.	<u>~</u>
Assign 🚫 Close	
Done 🧐 Local intranet	🔍 100% 🔻 🛒

Assigning to an Approval Process
17.4. Setting Priorities

Select the appropriate priority for each item listed. After confirming your selections, select the state button. The item(s)' priority will be updated.

🖉 Approval-Process Actions - Windows Internet Explorer	🛛
Assign Priority to Approval-Queue Document(s)	🕜 Help
Charles Jones - Application for Admission.pdf Process: Admission Approval Priority 1-Highest V	
Katherine Potter - Application for Admission.pdf Process: Admission Approval Priority 5	
Pamela Troy - Application for Admission.pdf Process: Admission Approval	
Priority 10 - Lowest 💌	
Assign Close	
Done 🧐 Local intranet	🔍 100% 🔹 🦼

Setting Priorities

17.5. The Admin Queue [Administrators]

The Admin *Approval Queue* provides a view of all items on all approval processes for document types you can administer. As an administrator you can approve, reject, or set priority on any of the items listed. You can also remove any of the items from their approval process using the **Remove from process** menu item on the **Approval Queue** menu.

To enter this view select the **Admin Queue** link at the top of the results frame. To narrow the view by document type, select a document type from the drop-down list at the top of the results frame.

To return to your personal *Approval Queue*, select the **My Queue** link.

17.6. History [Administrators]

The History area provides a view of items that have been previously approved, rejected, or removed from approval processes of all document types you can administer.

To enter this view select the **History** link at the top of the results frame. To narrow the view by document type, select a document type from the drop-down list at the top of the results frame.

To return to your personal Approval Queue, select the My Queue link.

18. The Work Queue [Enterprise Edition]

Your **Work Queue** contains documents that have been routed to you on an ad hoc basis. Access it by first selecting the **Folders** button from the main menu followed by the **Solution** from the **Folders** frame.

To narrow your view by catalog or document type, select from the drop-down list at the top of the results frame.

After you've performed your designated task(s) related to a document, you can either **Move** it or **Remove** it using the **Work Queue** menu. One or more documents can be moved or removed at the same time.

content v6 Search = F	Folders	Search All Catalogs	Adr	min 🔅 Option	s 🔒 Logout	Help
	Check File Modify	View Work Que	eue 🕖 Admin	Queue		Docs: 3 💌
Messages	Drag a column header here t	to group by that column.				
	Document	Catalog Do	ocument Type	Date Received	Student Name	Student ID
Checked Out	🔽 👼 Josh Powers - Applic	Student Records App	plication for Admis 8	/28/2009 9:05:25	losh Powers	580-48-6030
	🔲 🧔 Josh Powers - Applic	Student Records App	plication for Gradu 8	/28/2009 9:05:27	losh Powers	580-48-6030
🔀 Approval Queue	🔲 🧔 Josh Powers - Trans	Student Records Tra	inscript Request 8	/28/2009 9:05:27	losh Powers	580-48-6030
差 Work Queue	-					
Coding Queue	USF SOUTH	RSITY OF FLORIDA	Undergraduate	e Application fo	or Admission •	page 1
Custom Policies						
	POWERS JASHU	e A MATTHEW	SOCIAL SE		80 48 60	30
Catalog Browser	FORMER NAMES (list any first or la	ast names under which transcripts or	other records may be issue	ad)		
	ADDRESS (STREET, NUMBER, APT	FACHBLUD #4	02	PALM BE	ACH .	
	WEST PALM PENH,	12 33405 HOM	S MS02-5367	E-mail address	Smymail.com	
	in case of emergency notify: NAM	Ē		FATHER		
A	ADDRESS (STREET, NUMBER, APT.	.) CITY,	STATE, ZIP	1	TELEPHONE ()	
/ \DEMERO	NATION OF CITIZENSHIP		IF YOU ARE A PERM REGISTRATION CAR	MANENT IMMIGRANT, ATTACI RD.	H A PHOTOCOPY OF YOUR	

The Work Queue

18.1. Assigning or Moving Documents to a Work Queue

To *assign* one or more documents to one or more users or groups, select one or more documents from your results grid, and then select the **Send to Work Queue** menu item from the **File** menu.

P	Note
24	1100

When assigning a document to a *Work Queue* from the *Work Queue*, select the **Copy to Queue** menu item from the **Work Queue** menu instead.

To *move* documents from your *Work Queue* to another user or group, select the **Move to Queue** menu item from the **Work Queue** menu.

Documents are grouped by document type. You can choose one or more users or groups to assign each document group if your administrator has provided you with permission to assign to other users and groups. Selecting the **Send to My Queue** checkbox will send the document group to *only* your *Work Queue*.

You can choose to set an expiration on the selected documents. Each expired document will be automatically removed from the *Work Queue*. You may be limited on how long a document can exist in the *Work Queue*.

After confirming your selections, select the selection. The documents will be sent to the user(s) and/ or group(s) selected. When *moving* one or more documents, the documents will be removed from your *Work Queue*.

🥔 Work-Queue Actions - Windows Internet Explorer	
Assign Document(s) to Work Queue(s)	🕜 Help
Josh Powers - Application for Admission.pdf Name Description Type	
mthomas Mark Inomas User Assignees: 1 Add User Add Group Send to My Queue	
Expires in 7 Months -or- Never Expires	
Send to My Queue Expires in 7 Days Or- Never Expires	
Assign Close	
Done 🧐 Local intranet	€ 100% ·

Assigning Documents to the Work Queue

18.2. Sharing Documents

To *share* documents with guests or users, select one or more documents from your results grid, and then select the **Share** menu item from the **File** menu.

Select the AddRecipient button to add one or more recipients by e-mail address. While adding recipients, you can select the *Address Book* link to access existing e-mail addresses. When providing more than one e-mail address at a time, separate each with a semicolon.

You can choose to set an expiration on the selected documents. Each expired document will be automatically removed from the *Work Queue*. You may be limited on how long a document can exist in the *Work Queue*.

After confirming your selections, select the share button. The documents will be sent to the recipient(s) selected. If any of the recipients do not exist in the system, a new guest user will be created, and an invitation containing login details will be sent to the e-mail address provided.

🏉 Work-Queue Actions - Windows	Internet Explorer		
	Share Document(s)		🕜 Help
Charles Jones - Applicat	ion for Admission.pdf		
E-mail Address	Existing User		
🙀 charles.jones@school.ed	u No		
« Prev Next »	Recipients: 1		
Add Recipient			
Expires in 7 Months 💌 -o	r- □Never Expires		
Close 😡			
Done		Local intranet	€ 100% ×

Sharing Documents

18.3. Removing Documents

To remove one or more documents from your *Work Queue*, select the appropriate documents in your results grid followed by the **Remove from Queue** menu item from the **Work Queue** menu. Confirm your selections and select the GRemove button. The documents will be removed from your *Work Queue*.

C Work-Queue Actions - Windows Internet Explorer	_ 🗆 🛛
Remove Document(s) from Work Queue	🕜 Help
 ✓ Josh Powers - Application for Admission.pdf ✓ Josh Powers - Application for Graduation.pdf ✓ Josh Powers - Transcript Request.pdf 	
Remove Close	
Done Scoal intranet	€ 100% · .;;

Removing Documents from the Work Queue

18.4. The Admin Queue [Administrators]

The Admin *Work Queue* provides a view of all documents in each user's *Work Queue* for document types you can administer. As an administrator you can assign or remove any of the documents listed.

To enter this view select the **Admin Queue** link at the top of the results frame. To narrow the view by document type, select a document type from the drop-down list at the top of the results frame.

To return to your personal *Work Queue*, select the **My Queue** link.

18.5. Changing Expirations

To change the expiration of one or more documents in the Admin *Work Queue*, select the appropriate documents in your results grid followed by the **Set Expiration** menu item from the **Work Queue** menu. You may be limited on how long a document can exist in the *Work Queue*. Confirm your selections and select the select the selected documents.

🖉 Work-Queue Actions - Windows Internet Explorer	_ 🗆 🔀
Change Expiration	🕜 Help
Charles Jones - Application for Admission.pdf Document Type: Application for Admission; User: charles.jones@school.edu Expires in 7 Months - or- Never Expires Josh Powers - Application for Admission.pdf Document Type: Application for Admission; User: mthomas Expires in 7 Deys - or- Never Expires	
Assign Olose	
Done Succel intranet	🔍 100% 🔹 💡

Changing Expirations of Documents in the Admin Work Queue

19. Custom Retention Policies [*Enterprise Edition*]

The **Custom Policies** folder contains documents having retention policies differing from the documenttype retention policy. Access it by first selecting the **Folders** button from the main menu followed by selecting the **Folders** frame.



The Custom Policies Folder

19.1. Defining Custom Retention Policies

To override the default retention policy for one or more documents, select the **Set Retention Policy** menu item from the **Modify** menu.

First, choose the length of time each document should be retained in the catalog. You can alternatively select the **Retain Indefinitely** checkbox to prevent the document from being removed at any time. To remove a custom retention policy, select the **Remove policy** checkbox.

Select the Select the save your changes.

🕖 Document Retention Policy Override - Windows Internet Explorer
Override Default Retention Policy
Charles Jones - Enrollment Certification.pdf (created 8/28/2009) Retain for 12 Week(s) - or- Retain Indefinitely - or- Remove policy
Charles Jones - Transcript Request.pdf (created 8/28/2009) Retain for 6 Month(s) - or- Retain Indefinitely - or- Remove policy
Apply G Close
Done Succei intranet 🕀 100% 💌

Defining Custom Retention Policies

20. The Catalog Browser

The Catalog Browser within the Folders frame displays documents as they appear on the file system.

Access the **Folders** frame by selecting the *Folders* button from the main menu. Select the *icon* in the left frame to display the browser tree.

Files within the selected folder will appear in the results grid, and document actions may be performed on one or more selected documents. Navigate the browser tree by selecting the expand (+) and collapse (-) icons. If your administrator has enabled paging, you may see an additional row indicating the current page number of subfolders along with **Prev** and **Next** controls to navigate through the subfolder list. You can also enter a number in the empty textbox to advance to a specific page of subfolders.

content v6 Search	Folders 🕞 Capture Search All Catalogs 🕓 🚼 Admin 🚺 Options 🙆 Logout 🤇	Help
	Check File Edit Modify View Ø Drop file(s) here to upload Da	ocs: 12 💌
Messages	Drag a column header here to group by that column.	
	Document Catalog Document Typ File Size Date Modified Student Name Stud	lent ID
Checked Out	🔽 👼 Josh Powers - Ap Student Records Application for Ac 🛛 356,146 8/28/2009 4:19: Josh Powers 580-48	8-6030 🛛 📩
	🔲 💭 🥪 Josh Powers - Ap Student Records Application for Gr 👘 129,839 8/28/2009 4:19: Josh Powers 🛛 580-48	3-6030
🖂 Approval Queue	🔲 🖌 Josh Powers - Ap Student Records Application for Ri 👘 162,551 8/28/2009 4:19: Josh Powers 580-48	3-6030
	Josh Powers - Cr Student Records Change of Addre 69,511 8/28/2009 4:19: Josh Powers 580-48	3-6030
🚰 Work Queue	□ ✓ Josh Powers - Cr Student Records Conduct Stateme 122,450 8/28/2009 4:19: Josh Powers 580-48	3-6030 🗸
Coding Queue	UNIVERSITY OF SOUTH FLORIDA Undergraduate Application for Admission • page	, 1
Custom Policies		_
Catalog Browser	EGAL NAME: LACT. HRST. MODLE) SOCIAL SECURITY NUMBER Social SECURITY Social SECURITY NUMBER Social SECURITY NUMBER Social SECURITY	-
T T Student Basarda	ADDRESS (STREET, NUMBER, APT) SSO SALIDY REACH REVD # 402 PALM BEACH	-
- Alica Martinez	CITY STATE, 2P WEST PALM REACH, 12 33405 POME TELEPHONE Email address WEST PALM REACH, 12 33405 POME STATE STATE	-
	In case of emergency notify. NAME The ANYS DOWNER RELATIONSHIP	-
Josh Powers	ADDRESS (STRET, NUMBER, APT.) CITY, STATE, ZIP TELEPHONE	-
Katherine Potter	SAME AS ABOVE ()	-
Pamela Trov	NATION OF CITIZENSHP "IF YOU ARE A PERMANENT IMMIGRANT, ATTACH A PHOTOCOPY OF YOUR ALIEN NULS DOTHER! REGISTRATION CARD	-

Browsing Files Within a catalog

20.1. Cut, Copy, & Paste

The Edit menu can be used to Cut & Paste or Copy & Paste selected documents in the results grid from one folder to another.

content v6 Search	Folders	atalogs 🕓 😤 Admin	Options 🔒 Logout	Help
2	Check File Edit Modify View	🖉 🖉 Drop file(s) here to upload	Docs: 12 🔳
Messages	Drag a column he Cut p by that c	olumn.		
	Docui Copy log Do	ocument Typ File Size	Date Modified Student Name	Student ID
Checked Out	🔽 👼 Josh Pov 🛛 Paste Records Ap	plication for Ar 356,146	8/28/2009 4:19: Josh Powers	580-48-6030
	🔲 🥪 Josh Powers - Ar Student Records Ap	plication for G 129,839	8/28/2009 4:19: Josh Powers	580-48-6030
Approval Queue	🔲 ✔ Josh Powers - Ar Student Records Ap	plication for R 162,551	8/28/2009 4:19: Josh Powers	580-48-6030
	Josh Powers - Cł Student Records Ch	ange of Addre 69,511	8/28/2009 4:19: Josh Powers	580-48-6030
🚰 Work Queue	🔲 🛩 Josh Powers - Cr Student Records Co	nduct Stateme 122,450	8/28/2009 4:19: Josh Powers	580-48-6030 🗸
Coding Queue	USF UNIVERSITY OF SOUTH FLORIDA	Undergraduate Ap	plication for Admission	• page 1
	LEGAL NAME (LAST, FIRST, MIDDLE)	SOCIAL SECURIT	YNUMBER S304860	250
Catalog Browser	FORMER NAMES (list any first or last names under which tro	anscripts or other records may be issued)		
R T Student Records	ADDRESS (STREET, NUMBER, APT.) S80. SANDY BFACH BLUD.	#402	PALM BEACH	
Alisa Martinez	WEST PALM REAM, FL 33405	192 4502 -5367	Email address proymail. com	
Charles Jones	In case of emergency notify: NAME JANES POWERS		FATHER	
Josh Powers	ADDRESS (STREET, NUMBER, APT.)	CITY, STATE, ZIP	TELEPHONE ()	
Katherine Potter	NATION OF CITIZENSHIP	IF YOU ARE A PERMANENT REGISTRATION CARD.	IMMIGRANT, ATTACH A PHOTOCOPY OF YOUR	

The **Edit** Menu

20.1.1. Cut & Paste (Move)

- 1. Select one or more documents from the results grid displaying the items to cut.
- 2. Select the **Cut** menu item from the **Edit** menu.
- 3. Select the new folder to move the documents into.
- 4. Select the **Paste** menu item from the **Edit** menu.

20.1.2. Copy & Paste (Copy)

- 1. Select one or more documents from the results grid displaying the items to copy.
- 2. Select the **Copy** menu item from the **Edit** menu.
- 3. Select the new folder to copy the documents into.
- 4. Select the **Paste** menu item from the **Edit** menu.

20.2. The Context Menu

Access the context menu by right-clicking any folder in the **Catalog Browser** tree in the left frame. The following operations can be performed using the context menu:

New Folder	Creates a subfolder within the selected folder. After selecting this menu item, you need to enter a name for the new folder.
Rename Folder	Allows you to rename the selected folder. After selecting this menu item, you need to enter the new name for the existing folder.
Delete Folder	Removes the selected folder from the selected catalog. The folder must be empty.
Add Document(s)	Loads the Drag & Drop Upload applet to upload new documents or other content. For more information, see <u>Section 6.2.1, "Using the Context Menu or File Menu"</u> .
Properties (Administrators)	Allows the folder selected to be assigned to a specific document type. For more information, see <u>Section 20.3</u> , "Assigning Document Types to Folders [Administrators]".

conte	nt v6 Search	🗖 Fo	Iders		Capture	Search A	Il Catalogs 🔍	Admin	Options	🔒 Logout	Help	
			Che	eck	File Edit	Modify Vi	ew 🕖	Drop file(s	s) here to upload		Docs: 12	2 🔳
Þ	Messages		Drag	g a c	olumn header h	ere to group by the	at column.					
					Document	Catalog	Document Typ	File Size	Date Modified	Student Name	Student ID	
	Checked Out			R,	Josh Powers - A	student Records	Application for Ar	356,146	8/28/2009 4:19: 。	Josh Powers	580-48-6030	
-	a.			٦	Josh Powers - A	¢ Student Records	Application for G	129,839	8/28/2009 4:19:	Josh Powers	580-48-6030	
	🐧 Approval Queue			<	Josh Powers - A	; Student Records	Application for R	162,551	8/28/2009 4:19: 4	Josh Powers	580-48-6030	
-				⋞	Josh Powers - C	FStudent Records	Change of Addre	69,511	8/28/2009 4:19:	Josh Powers	580-48-6030	
	Work Queue			<	Josh Powers - C	C Student Records	Conduct Stateme	122,450	8/28/2009 4:19: <	Josh Powers	580-48-6030	
2	Coding Queue			U	JSF SOU	VERSITY OF TH FLORIDA	Under	rgraduate Aj	pplication for	Admission •	page 1	
				LEGA	L NAME (LAST, FIRST,	MIDDLE)		SOCIAL SECURI		48 60	50	
	New Folder			FORM	MER NAMES (list any fir	st or last names under whi	the transcripts or other reco	ords may be issued)				
	Rename Folder			S	RESS (STREET, NUMBEI	R, APT.) ' <i>BFACH BLV</i>	0. #402		PALM BEAN	9		
	Delete Folder			W	EST PALM AEA	H, FL 3340S	HOME TELEPH	0NE + 536フ	E-mail address	mymail.com		
	Add Document(s)			in cas	a of emergency notify: AMES POWER	NAME			FATHER			
	Properties			SA	NESS (STREET, NUMBER	арт.) 1 <u>Б</u>	CITY, STATE, ZI	P		TELEPHONE ()		
	Katherine Potter Pamela Trov	~		NATIO	ON OF CITIZENSHIP		IE RE	YOU ARE A PERMANEN GISTRATION CARD.	IT IMMIGRANT, ATTACH A I	PHOTOCOPY OF YOUR	LIEN	-

The Context Menu

20.3. Assigning Document Types to Folders [Administrators]

The Folder Properties dialog allows administrators to assign a document type to the folder selected.

If the **Inherit Settings** checkbox is selected, the selected folder will use the settings of its parent.

To assign a document type, uncheck the **Inherit settings** checkbox and choose the appropriate document type.

Selecting the **Hide folder** checkbox will hide the selected folder from any user who does not have the *View* permission for the selected document type.

Selecting the Apply to all subfolders checkbox will apply the selections to all subfolders.

Select the Apply button when you are finished.

After assigning a document type, documents landing in this folder from a drag-and-drop upload will inherit the document type assigned.

Note

Assigning a document type to a folder overrides each user's default document type for the catalog when performing a drag-and-drop upload.

🔗 Folder Properties - Windows	Internet Explorer	_ 🗆 🛛
Fc	older Properties	🕜 Help
Catalog Name: Student Reco Folder: Josh Powers	ords	
✓ Inherit settings		
Document type association:	~	
Hide folder if user does r	not have View Document permissio	
Apply to all subfolders		
Apply 🚫 Close		
Done	Scoral intranet	🔍 100% 🔹 🖉

Folder Properties

Chapter 5. The Messages Folder

The **Messages** folder contains system message and notifications. Access it by first selecting the Folders

button from the main menu. Select the \bowtie icon in the **Folders** frame to display the **Messages** folder. A copy of each message can be automatically sent to your e-mail address. For more information, see <u>Section 5.2</u>, <u>"Preferences"</u>.

Icons displayed in the **Messages** folder are as follows:

Message Unread

Message Read

The following are some of the message types that can exist in your Messages folder:

Document Check-In Request	This message will be sent to you when another user has requested that a checked-out document be checked in, and you are the user who has previously checked out the document. Some of these documents may be in your <i>Approval Queue</i> [<i>Enterprise Edition</i>].
New Document in Approval Queue [<i>Enterprise Edition</i>]	This message will be sent to you when a document arrives in your <i>Approval Queue</i> . This notification can be enabled or disabled in your <u>User Preferences</u> .
Zonal OCR Warning [Enterprise Edition]	When the Capture Service processes a captured document with zonal OCR, and the extracted text does not match the format of the document-type field, a message will be sent to you indicating the document to find in your <i>Coding Queue</i> . This notification can be enabled or disabled in your <u>User Preferences</u> .
Unprocessed File Notification (Administrators only)	When the Capture Service has trouble processing one or more image files, a message will be sent to you indicating the problem encountered along with the full path to the problem file(s). This notification can be enabled or disabled in your <u>User Preferences</u> .

The **Message Actions** menu allows you to mark one or more messages as **Read** or **Unread**. You may also **Delete** one or more messages from the list.



The Messages Folder

Chapter 6. Mobile Site

The Content Central Mobile site is designed for mobile devices like smart phones and tablets. It contains a subset of tools that are available in the full application.

1. Connecting to the Mobile Site

To access Content Central Mobile you will need to launch your preferred Web browser on your mobile device and enter the URL (address) for Content Central. In most cases, your mobile device will be automatically detected, and the mobile version of Content Central will be launched.

To access the mobile site manually, enter /mobile at the end of the URL for Content Central. For example, if your Content Central URL is http://contentcentral.domain.comm/, the mobile site will be located at http://contentcentral.mydomain.comm/mobile/.

Once you've successfully accessed Content Central Mobile, you will need to provide your **Username** and **Password**. Use the same credentials you would use for the full site and select the **Login** button. To navigate to the full version of Content Central, select the **Full Site** button.

If you would like to prevent having to log in each time, select the Keep me logged in checkbox.

Note

This option may not be available in all configurations. Selecting the **Logout** button on the main menu will require you to log in again.

content central mobile	
lleernome	
Username	
demo	
Password	
••••	
■ Keep me logged in	
Login	Full Site

Logging In to Content Central Mobile

2. The Main Menu

The main menu is displayed after you login. From the main menu you can access the mobile versions of the **Approval Queue** and the **Catalog Browser**. You can also **Logout** of the mobile site.



The Main Menu

3. The Approval Queue

Your **Approval Queue** contains documents or packets that have been routed to you based on an approval process. Access it by selecting **Approval Queue** button from the main menu.

Only one document at a time is displayed in this mobile version of the **Approval Queue**. Use the **Previous** and **Next** buttons at the top of the page or the navigation menu on the next line to access other documents in your queue.

Select the View/Save button to download the current document.

The center portion of the page describes various aspects of the current document as it relates to the approval process.

To approve or reject a document, enter an optional **Note for approval/rejection** and select the **Approve** or **Reject** button.

In some cases, you may need to select a specific user recipient for approval or rejection and/or enter your personal PIN.

To return to the main menu, select the Home button. To logout, select the Logout button.

Prev	Next	View/Save	•
<u>1</u> 2 3 4 5 Last			
Document Name	Purchase Bowman Fabricati	e Order 7311 - on.pdf	
Approval Process	PO Appr	oval	
Received	8/23/201	2 8:31 AM	
Deadline	1 Day 15	Hours	
Catalog	Accounts	s Payable	ľ
DocType	Purchase	e Order	
Priority	5		
Your note	for approv	al/rejection	+

The Approval Queue

4. The Catalog Browser

The **Catalog Browser** allows you to navigate through folders of documents you can access in the system. Access it by selecting **Catalog Browser** button from the main menu.

Catalog Browser > Accounts Payable		
Bowman Fabrication		<u>Documents</u>
Jones Engineering		Documents
Martinez Logistics		<u>Documents</u>
Potter Chemicals		<u>Documents</u>
Powers and Associates		Documents
Troy Aerospace		<u>Documents</u>
Back	Home	Logout

The Catalog Browser

4.1. Folder View

The **Catalog Browser** is divided into two views: folder and file. The folder view is displayed when you first enter the **Catalog Browser**. The navigation area at the top of the page keeps track of your location. You can select an individual folder from this panel to jump directly to that folder.

To navigate into a folder, select any link from the *left* column. To view a list of documents for the listed catalog folder, select the **Documents** link in the *right* column.

To move back one folder level, select the **Back** button at the bottom of the page. To return to the main menu, select the **Home** button. To logout, select the **Logout** button.

4.2. File View

When selecting a **Documents** link, you will be presented with the file view. Just as in folder view, the navigation area at the top of the page displays your current location. You can select an individual folder from this panel to jump directly to that folder view.

Only one document is displayed at a time in file view. The navigation area below your current location allows you to move to the **Previous** or **Next** document in the folder. The center portion of the page describes the name of the current document as well as its catalog and document type.

Select the View/Save button to download the current document.

To move back to folder view, select the **Back** button at the bottom of the page. To return to the main menu, select the **Home** button. To logout, select the **Logout** button.

Appendix A. Supported File Types with Existing Content

As of version 6.5.x these are the supported file types that the Catalog Service will recognize for *existing* content and metadata.

Adobe Acrobat (*.pdf) Ami Pro (*.sam) Ansi Text (*.txt) ASCII Text ASF media files (metadata only) (*.asf) CSV (Comma-separated values) (*.csv) DBF(*.dbf) **EBCDIC** EML files (emails saved by Outlook Express) (*.eml) Enhanced Metafile Format (*.emf) Eudora MBX message files (* .mbx) GZIP(*.gz) HTML(*.htm, *.html) JPG(*.jpg) Lotus 1-2-3 (*.wk?, *.123) MBOX email archives (including Thunderbird) (*.mbx) MHT archives (HTML archives saved by Internet Explorer) (*.mht) MIME messages MSG files (emails saved by Outlook) (*.msg) Microsoft Access MDB files (*.mdb) Microsoft Document Imaging (*.mdi) Microsoft Excel (*.xls) Microsoft Excel 2003 XML (* . xml) Microsoft Excel 2007 (*.xlsx) Microsoft Outlook/Exchange Microsoft Outlook Express 5 and 6 (*.dbx) message stores Microsoft PowerPoint (*.ppt) Microsoft PowerPoint 2007 (*.pptx) Microsoft Rich Text Format (*.rtf) Microsoft Searchable Tiff (*.tiff) Microsoft Word for DOS (*.doc) Microsoft Word (*.doc) Microsoft Word 2003 XML (*.xml) Microsoft Word 2007 (*.docx) Microsoft Works (*.wks) MP3 (metadata only) (*.mp3) Multimate Advantage II (*.dox) Multimate version 4 (*.doc) OpenOffice 2.x and 1.x documents, spreadsheets, and presentations (*.sxc, *.sxd, *.sxi, *.sxw, *.sxg, *.stc, *.sti, *.stw, *.stm, *.odt, *.ott, *.odg, *.otg, *.odp, *.otp, *.ods, *.ots, *.odf) (includes OASIS Open Document Format for Office Applications) Quattro Pro (*.wb1, *.wb2, *.wb3, *.qpw) TAR(*.tar) TIF(*.tif)

TNEF(winmail.dat) Treepad HJT files (*.hjt) Unicode (UCS16, Mac or Windows byte order, or UTF-8) Windows Metafile Format (*.wmf) WMA media files (metadata only) (*.wma) WMV video files (metadata only) (*.wmv) WordPerfect 4.2 (*.wpd, *.wpf) WordPerfect (5.0 and later) (*.wpd, *.wpf) WordStar versions 1, 2, 3 (*.ws) WordStar versions 4, 5, 6 (*.ws) WordStar 2000 Write (*.wri) XBase (including FoxPro, dBase, and other XBase-compatible formats) (*.dbf) XML(*.xml) XML Paper Specification (*.xps) XSL XyWrite ZIP(*.zip)

Appendix B. Advanced Search Syntax

1. Search Requests

Content Central supports three types of *full-text* search requests:

Any Words An *any words* search is any sequence of text, such as a sentence or question. In this type of search, use quotation marks around phrases, place a + in front of any word or phrase that is required, and place a - in front of a word or phrase to exclude it.

Example B.1. Any-Words Request

banana pear "apple pie" "apple pie" -salad +"ice cream"

- All Words An *all words* search request is similar to an *any words* request expect that all of the words in the search request must be present for a document to be found.
- Boolean A search request consists of word or phrase groups linked by connectors such as *AND* and *OR*, which indicate the relationship between them.

Table B.1. Boolean Search Requests

apple and pear	both words must be present
apple or pear	either word can be present
apple w/5 pear	apple must occur within 5 words of pear
apple not w/5 pear	apple must occur, but not within 5 words of pear
apple and not pear	only apple must be present

If you use more than one connector, use parentheses to indicate precisely what you want to search for. For example, *apple and pear or orange* could mean (*apple and pear*) or orange, or it could mean *apple and* (*pear or orange*).

Noise words, such as *if* and *the*, are ignored.

Search terms may include the following special characters:

Table B.2. Special Characters

?	matches any character
=	matches any single digit
*	matches any number of characters
~~	range search

2. Words and Phrases

To search for a phrase, use quotation marks around it.

Example B.2. Phrase Search

apple w/5 "fruit salad"

If a phrase contains a noise word, the search engine will skip over the noise word when searching for it. For example, when search for *statue of liberty*, the engine would retrieve documents containing the word *statue*, any intervening word, and the word *liberty*.

Punctuation inside of a search word is treated as a space. Example: can't would be treated as a phrase consisting of two words: can and t.

3. Wildcards

A search word can contain the wildcard characters * and ?. A ? in a word matches any single character, and a * matches any number of characters. The wildcard characters can be in any position in a word. For example:

*appl** would match *apple*, *application*, etc. **cipl** would match *principle*, *participle*, etc. *appl*? would match *apply* and *apple* but not *apples*. *ap***ed* would match *applied*, *approved*, etc.

Use of the * wildcard character near the beginning of a word will slow searches somewhat.

The = wildcard matches any single digit. For example: N = = = would match N123 but not N1234 or Nabc.

4. Fuzzy Searching

Fuzzy searching will find a word even if it is misspelled. For example, a fuzzy search for *apple* will find *appple*. Fuzzy searching can be useful when you are searching text that may contain typographical errors, or for text that has been scanned using optical character recognition (OCR).

Add fuzziness selectively using the % character. The number of % characters you add determines the number of differences the search engine will ignore when searching for a word. The position of the % characters determines how many letters at the start of the word have to match exactly. Examples: ba%*nana*: Word must begin with ba and have at most one difference between it and *banana*. *b*%%*anana*: Word must begin with b and have at most two differences between it and *banana*.

5. Phonic Searching

Phonic searching looks for a word that sounds like the word you are searching for and begins with the same letter. For example, a phonic search for *Smith* will also find *Smithe* and *Smythe*.

To ask the search engine to search for a word phonically, put a # in front of the word in your search request. Examples: #*smith*, #*johnson*

6. Stemming

Stemming extends a search to cover grammatical variations on a word. For example, a search for *fish* would also find *fishing*. A search for *applied* would also find *applying*, *applies*, and *apply*.

To add stemming selectively, add a \sim at the end of words that you want stemmed in a search. Example: *apply* \sim The stemming rules included with the search engine are designed to work with the English language.

7. Numeric Range Searching

A numeric range search is a search for any numbers that fall within a range. To add a numeric range component to a search request, enter the upper and lower bounds of the search separated by $\sim\sim$ like this: *apple w/5 12~~17*. This request would find any document containing *apple* within 5 words of a number between *12* and *17*.

Note

A numeric range search includes the upper and lower bounds (so *12* and *17* would be retrieved in the above example).

Note

Numeric range searches only work with positive integers.

Note

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For purposes of numeric range searching, decimal points and commas are treated as spaces and minus signs are ignored. For example, -123,456.78 would be interpreted as: 123 456 78 (three numbers). Using alphabet customization, the interpretation of punctuation characters can be changed. For example, if you change the comma and period from space to ignore, then 123,456.78 would be interpreted as 12345678.

8. AND Connector

Use the *AND* connector in a search request to connect two expressions, both of which must be found in any document retrieved. For example: *apple pie and poached pear* would retrieve any document that contains both phrases. (*apple or banana*) and (*pear w/5 grape*) would retrieve any document that (1) contains either *apple* OR *banana*, AND (2) contains *pear* within 5 words of *grape*.

9. OR Connector

Use the *OR* connector in a search request to connect two expressions, at least one of which must be found in any document retrieved. For example, *apple pie or poached pear* would retrieve any document that contained *apple pie, poached pear*, or both.

10. W/N Connector

Use the *W/N* connector in a search request to specify that one word or phrase must occur within N words of the other. For example, *apple w/5 pear* would retrieve any document that contained *apple* within 5 words of *pear*. The following are examples of search requests using *W/N*:

(apple or pear) w/5 banana (apple w/5 banana) w/10 pear (apple and banana) w/10 pear

The *pre/N* connector is like *W/N* but also specifies that the first expression must occur before the second. Example:

(apple or pear) pre/5 banana

Some types of complex expressions using the *W/N* connector will produce ambiguous results and should not be used. The following are examples of ambiguous search requests:

(apple and banana) w/10 (pear and grape) (apple w/10 banana) w/10 (pear and grape)

In general, at least one of the two expressions connected by W/N must be a single word or phrase or a group of words and phrases connected by OR. Example:

(apple and banana) w/10 (pear or grape) (apple and banana) w/10 orange tree

11. NOT and NOT W/N

Use *NOT* in front of any search expression to reverse its meaning. This allows you to exclude documents from a search. Example:

apple sauce and not pear

NOT standing alone can be the start of a search request. For example, *not pear* would retrieve all documents that did not contain *pear*.

If *NOT* is not the first connector in a request, you need to use either *AND* or *OR* with *NOT*:

apple or not pear not (apple w/5 pear)

The *NOT W*/ ("not within") operator allows you to search for a word or phrase not in association with another word or phrase. Example:

apple not w/20 pear

Unlike the *W*/ operator, *NOT W*/ is not symmetrical. That is, *apple not w*/20 *pear* is not the same as *pear not w*/20 *apple*. In the *apple not w*/20 *pear* request, the search engine searches for *apple* and excludes cases where *apple* is too close to *pear*. In the *pear not w*/20 *apple* request, the search engine searches for *pear* and excludes cases where *apple* is too close to *pear* is too close to *apple*.

Appendix C. Supported Bar Code Symbologies

As of version 6.5.x these are the supported bar code symbologies that the Capture Service will recognize when one or more recognition zones have been defined in a document type.

Codabar Code 11 Code 128 Code 128 (EAN-128) Code 3 of 9 EAN-13 EAN-8 Industrial 2 of 5 (Code 25) Interleaved 2 of 5 Matrix 2 of 5 Plessey UPC-A UPC-E