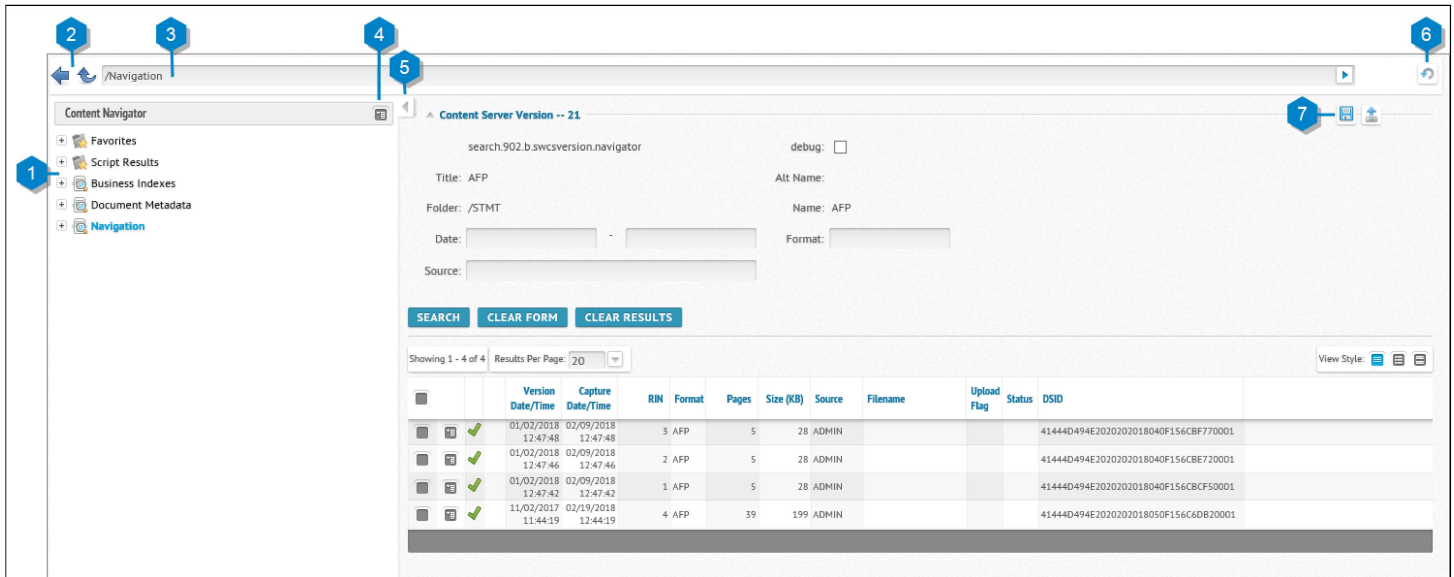


Content Navigator: User Interface Help

To search for content, open the Content Navigator window:

Click **Find > Content Navigator**.



Button	Description
1 Navigation Tree	<ul style="list-style-type: none">• The navigation tree displays a list of folders into which documents are sorted. and as well as each Content Server, document, and document version that you can access.• Navigate through the folder structure within the Content Servers to locate documents and versions.• You can click each item in the navigation tree to perform a search in that directory.• To close the tree, click the Toggle Tree Panel button, which is located in the upper right of the panel (next to the document icon).
2 Navigation buttons	At the top of the window are several buttons that can assist you in working with the navigator. These buttons allow you to navigate the tree or refresh what currently appears in the display window. “Go Back” returns you to the previous document or directory. “Go Up” navigates up a level within the navigation tree.
3 Address bar	The address bar at the top of the window displays the path name for the currently selected entity (server, directory, or document). You can manually locate an item (folder or document) by entering the path name in the address bar and pressing the Enter key to navigate directly to the specified path.
4 Action menu	Click this icon to view the following options: <ul style="list-style-type: none">• Find All Content By Report—Searches for content by report. Alternatively, you can select this option in the navigation tree. See below for more information.• Find All Content By Index—Searches for content by index. Alternatively, you can select this option in the navigation tree. See below for more information.• Reset SWCS Global Variables—If the global variables (SERVERURL entry and DONOTPROCESSXID entry) have been modified at all, the changes will not be applied automatically. You would need to select this option whenever the variables have been modified to clear the cache and actually apply the changes in Content Navigator.• Reload—Reloads the navigation tree.
5 Toggle Tree Panel button	Collapses or expands the navigation tree.
6 Refresh	Refreshes what currently appears in the display window.
7 Save/Load Search buttons	Used to save a set of search criteria or to load a saved search.

▼ **General Search Options**

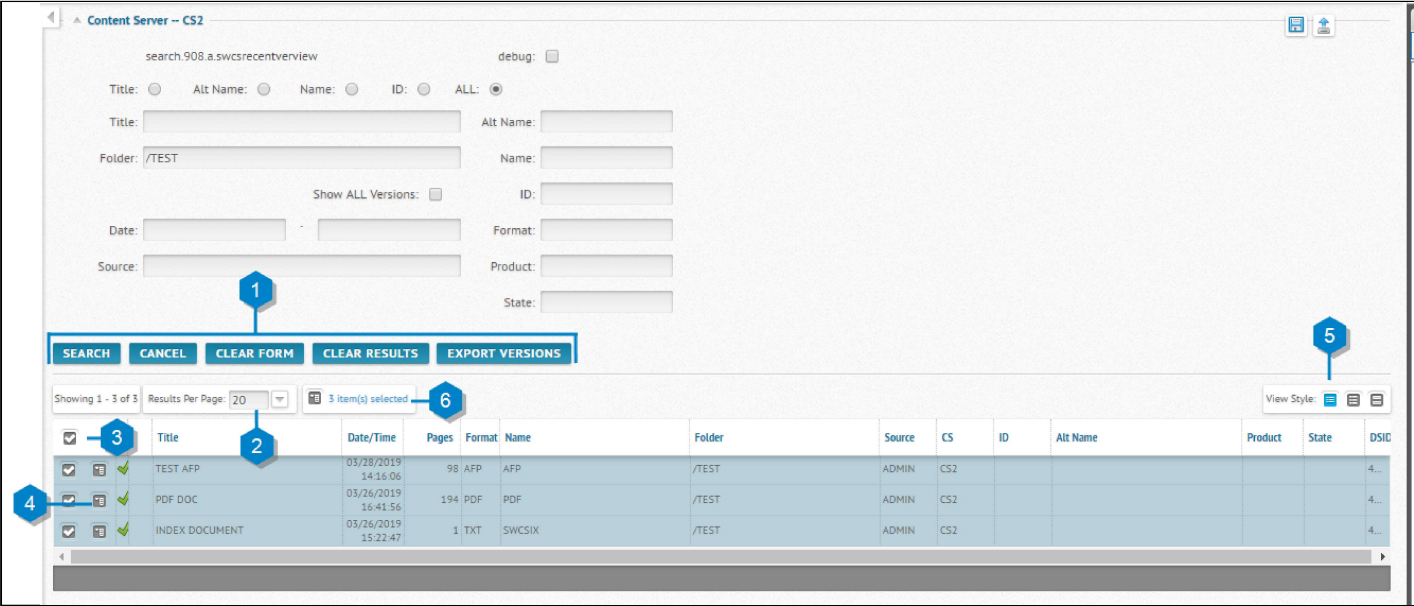
When you select a document from the search results panel, the document opens in [Document Viewer](#). This section describes the options for initiating and controlling a search for a document or range of documents, with the option to view and download the documents from the search results panel.

PDF Transforms

Each document is available in its native format and in any other formats enabled by the Transform capabilities of your Content Cloud installation and configuration.

If a file type in your installation is not supported by a PDF Transform for the document, the system cannot complete a request to download the document in PDF format. A notification in PDF format is downloaded, instead of the document content. The following line is an example notification for a document stored in AFP format without a PDF Transform configured. It specifies the content server node, the title of the document file, and the date and time the document was captured: **Attach content of CS1 = Title TEST.RPT = 11-30-2018_11-48-54**

This restriction applies to the Action Menu and the Multi-select Action Menu, both of which are described in the following table.



Button	Description
1 Search action buttons	<ul style="list-style-type: none">Search - Runs the search. If you do not have anything filled out in the search fields, clicking this button will return all results.Cancel - Cancels the search and clears the Content Navigator panel.Clear Form - Clears the search fields.Clear Results - Clears the search results.Export Versions - Exports one or more of the search results.
2 Results Per Page	Select how many results will be displayed on one page of search results.
3 Select All	Check this box to select all search results. You can also select a range of documents by selecting a document at the top of the range and shift-clicking the last document in the range. All documents in between will be selected.

Button	Description
4 Action Menu	<p>Click this icon to view several actions you can perform on this document.</p> <ul style="list-style-type: none"> • View - Hover over this option to display the sub-menu view options, or you can click this option to view in the default Viewer. Options available are dependent on the document format. <p>ASC PDF - Generic TXT</p> <ul style="list-style-type: none"> • View in New Window - Hover over this option to display the sub-menu view options, or you can click this option to view in the default Viewer in a new window. Options available are dependent on the document type. <p>ASC PDF - Generic TXT</p> <ul style="list-style-type: none"> • Show Versions - Displays all the versions of this search result. • Add Report to Favorites - Adds this report to your favorites. • Notes - Opens the Notes panel to view all notes for this search result. • Download - Hover over this option to display the submenu download options, or click this option to download the default format. When you click Download and there is more than one page in the document, you can select the Start page and Max Page number to download, as well as select the option to remove page breaks before downloading. <p>Default ASC PDF - Generic TXT</p> <ul style="list-style-type: none"> • Select - Selects this search result. Alternatively, you can click the check box next to the action menu to select this result. Select one or multiple documents to combine them into a download as a ZIP, TXT or PDF file.
5 View Style	Select one of the three styles to view the search results: Tight, Comfy, or Spacious.
6 Multi-select Action Menu	<p>Click this icon to view several actions you can perform on this document.</p> <ul style="list-style-type: none"> • View - Hover over this option to display the sub-menu view options, or you can click this option to view in the default Viewer. Options available are dependent on the document format. <p>PDF - Generic TXT</p> <ul style="list-style-type: none"> • View in New Window - Hover over this option to display the sub-menu view options, or you can click this option to view in the default Viewer in a new window. Options available are dependent on the document type. <p>PDF - Generic TXT</p> <ul style="list-style-type: none"> • Download - Hover over this option to display the sub-menu download options, or click this option to download the default format. When you click Download and there is more than one page in the document, you can select the Start page and Max Page number to download, as well as select the option to remove page breaks before downloading. <p>ZIP TXT PDF - Generic XML</p> <ul style="list-style-type: none"> • Deselect All - Deselects all the documents currently selected in the search results window.

▼ Document Metadata - Properties

All search fields are optional.

The screenshot shows the 'Document Properties' search window. On the left is a 'Content Navigator' with a tree view containing 'Favorites', 'Script Results', 'Business Indexes', 'Document Metadata' (expanded), 'Properties', 'Indexes', and 'Navigation'. The main area is titled 'Document Properties' and contains search fields: 'Title', 'Alt Name', 'Name', 'ID', and 'All' (radio buttons); 'Folder' (text input); 'Show ONLY Favorites' and 'Show ALL Versions' (checkboxes); 'Date' (text input with a calendar icon); 'Source' (text input); 'Alt Name', 'Name', 'ID', and 'Format' (text inputs); and 'CS: Choose Option(s)' (dropdown menu). At the bottom are buttons: 'SEARCH', 'CANCEL', 'CLEAR FORM', 'CLEAR RESULTS', and 'EXPORT VERSIONS'. Numbered callouts (1-11) point to specific fields: 1 to Title, 2 to Folder, 3 to Show ONLY Favorites, 4 to Show ALL Versions, 5 to Date, 6 to Source, 7 to Alt Name, 8 to Name, 9 to ID, 10 to Format, and 11 to CS.

Search Field	Action
1 Title	Enter part or all of the document's title as it appears in the system.
2 Folder	Type part or all of the root folder name. <i>Note: You cannot search only by subfolders.</i>
3 Show Only Favorites	Check this box to return only the versions you have chosen as favorites.
4 Show All Versions	Check this box to return all versions of the documents.
5 Date	Enter the start and end date in MM/DD/YYYY format or select a date range from the drop-down calendars.
6 Source	Enter the location from which the document was generated.
7 Alt Name	Type any alternative names under which the document(s) might be stored.
8 Name	Enter part or all of the document name as it appears in the system.
9 ID	If the document was assigned a JCL Form ID (common with Content Server z/OS) you can enter that ID here to refine your search.
10 Format	Enter the format type (e.g., ASC) that you want to search for.
11 CS	Select one, more, or all Content Servers to search. <i>Note: To select more than one Content Server, click Select All or press the CTRL key and click each Content Server you want to search.</i>

▼ Document Metadata - Index

Most search fields are required when you search by index.

The red triangle next to a field indicates that the system requires an entry in the field to complete the operation.

	Search Field	Description
1	Group	Select the group to which the document belongs from the drop-down list.
2	Index	From the drop-down list, select the index to use to refine the search. This will return index variables instead of complete documents.
3	Date	Enter the start and end date in MM/DD/YYYY format or select a date range from the drop-down calendars.
4	Add Document Filters to Search Criteria	Check this box to add these search fields: Title, Alt Name, Name, Folder, CS, and ID.
5	Value	Enter the value of the index to refine the document view to the information you would like to use.
6	Format	Enter the format type (e.g., ASC) that you want to search for.

Search Options




Click the Action menu icon to display search options.









Search options are the same as those available when you search content by report.

Some differences in the available Action menu commands occur in the Action menu beside the search result:

Showing 1 - 4 of 4

Results Per Page: 20

View Style:   

		Version Date/Time	Capture Date/Time	RIN	Format	Pages	Size (KB)	Source	Filename	Upload Flag	Status	DSID
		01/02/2018 12:47:48	02/09/2018 12:47:48	3	AFP	5	28	ADMIN				41444D494E2020202018040F156CBF770001
		01/02/2018 12:47:46	02/09/2018 12:47:46	2	AFP	5	28	ADMIN				41444D494E2020202018040F156CBE720001
		01/02/2018 12:47:42	02/09/2018 12:47:42	1	AFP	5	28	ADMIN				41444D494E2020202018040F156CBF50001
		11/02/2017 11:44:19	02/19/2018 12:44:19	4	AFP	39	199	ADMIN				41444D494E2020202018050F156C6DB20001

Action Menu Option	Action
View	Hover on this option to display the submenu view options, or you can click this option to view in the default Viewer. <ul style="list-style-type: none"> • TXT • PDF -- Generic
View in New Window	Hover on this option to display the submenu view options, or you can click this option to view in the default Viewer in a new window. <ul style="list-style-type: none"> • TXT • PDF -- Generic
Notes	Select to view or add notes to the report.

Action Menu Option	Action
Download	<p>Hover on this option to display the submenu download options, or click this option to download the default format.</p> <ul style="list-style-type: none"> • TXT • PDF -- Generic <p>When you click Download, you can select the Start page and Max Page number to download, as well as select the option to remove page breaks before downloading (if there is more than 1 page in the document).</p>
Move Version	Select to move this document version to a new location.
Hide Version	Select to hide the version from the search results. You will be prompted to include a reason as to why the version will be hidden.
Hold Version	
Select	Selects this search result. Alternatively, you can click the check box next to the action menu to select this result.

▼ My Favorites

Search Field	Description
Name	This field automatically populates with the category name.
Description	This field automatically populates with the category name, but you can enter in a different description, if needed.
Owner	This field automatically populates with the owner based on the category.
Groups	Select one or more groups from the drop-down list.
Shared	Select Yes or No from the drop-down list to indicate whether the favorite has been shared or not.

To search in a subfolder:

Search Field

Description

Radio buttons

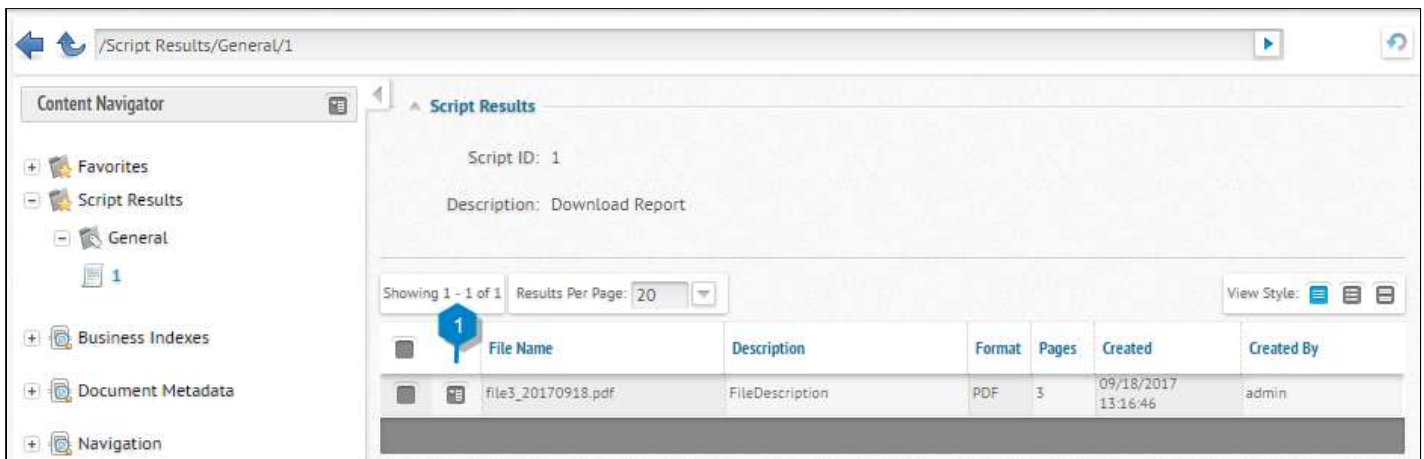
Select a radio button to customize your search fields based on the following choices:

- **Title** - Search for a document by the title.
- **Alt Name** - Search for a document by the alternative name.
- **Name** - Search for a document by the document's name.
- **ID** - Search for a document by the ID.
- **ALL** - Search for a document using all of the custom search fields.

Title	Enter part or all of the document's title as it appears in the system.
Folder	Type part or all of the root folder name. <i>Note: You cannot search only by subfolders.</i>
Show Only Favorites	Check this box to return only the versions you have chosen as favorites.
Show All Versions	Check this box to return all versions of the documents.
Date	Enter the start and end date in MM/DD/YYYY format or select a date range from the drop-down calendars.
Alt Name	Type any alternative names under which the document(s) might be stored.
Name	Enter part or all of the document name as it appears in the system.
ID	If the document was assigned a JCL Form ID (common with Content Server z/OS) you can enter that ID here to refine your search.
Format	Enter the format type (e.g., ASC) that you want to search for.
Source	Enter the location from which the document was generated.

▼ Script Results

Once a script has been run, you can view the results on the Script Results panel. When a specific script result is selected, you will see the Script ID and Description, as defined during creation of the script. Clicking the script result starts the download of the file.



Field

Description

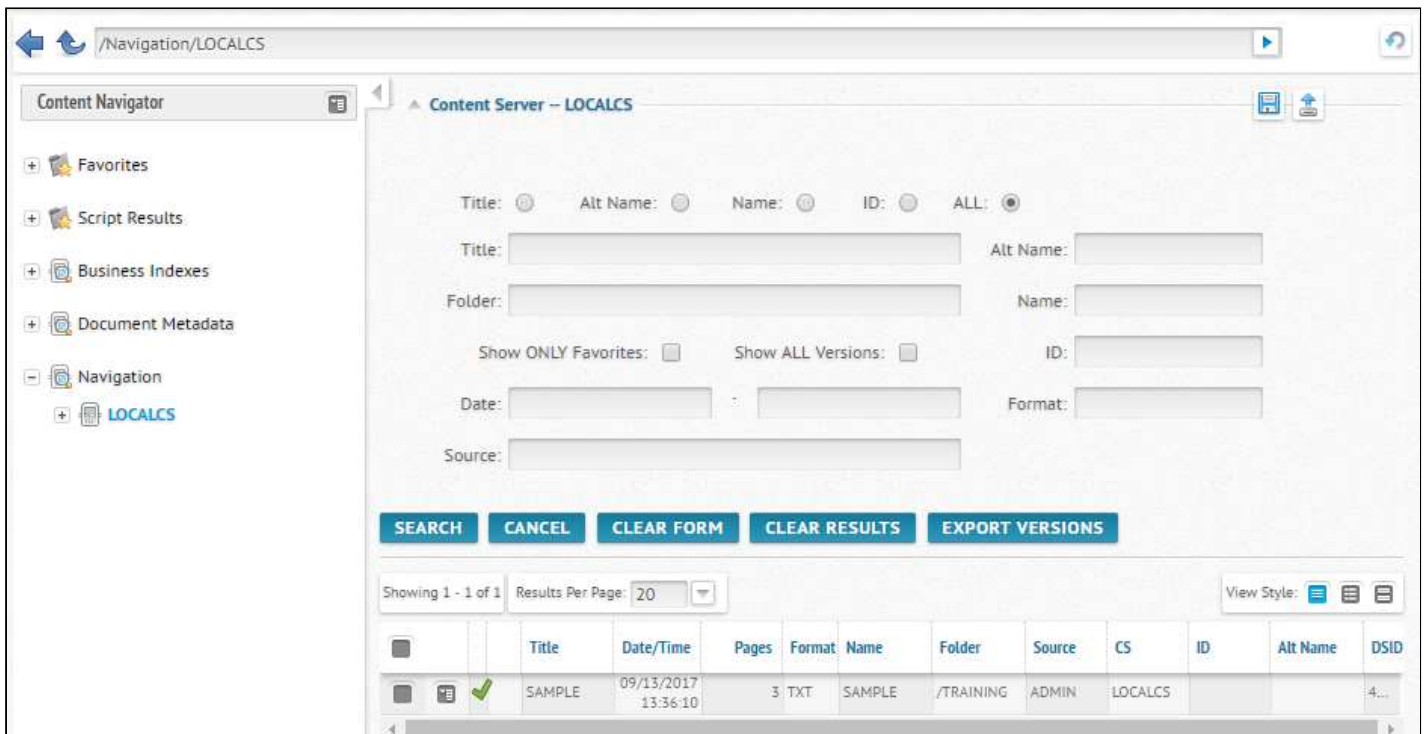
1 Action Menu

On the action menu next to each script result, you have the following options:

- Download: Downloads the script results as a ZIP file.
- Delete Version: Deletes the selected script result.
- Select: Click to select this script result; the result is selected for action and added to the multi-item list above the search results.
- Deselect: Deselects the selected script result and removes the result from the multi-item list above the search results.

▼ Content Server Directories

You can search a specific Content Server directory by selecting the Content Server from the navigation tree. You can also drill down the search by searching within a specific folder in the directory.



Search Field

Action

Radio buttons

Select a radio button to customize your search fields based on the following choices:

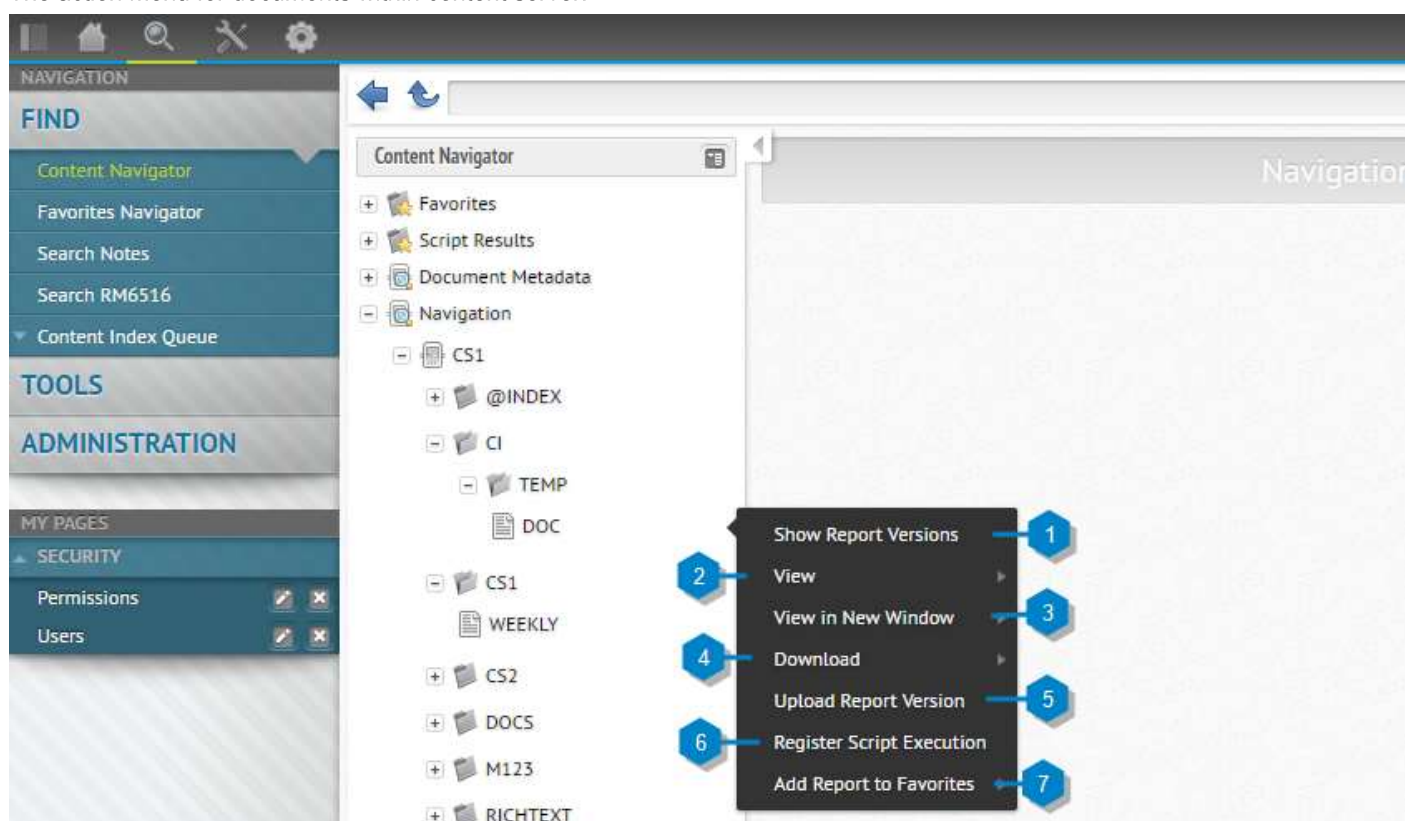
- **Title** - Search for a document by the title.
- **Alt Name** - Search for a document by the alternative name.
- **Name** - Search for a document by the document's name.
- **ID** - Search for a document by the ID.
- **ALL** - Search for a document using all of the custom search fields.

Search Field	Action
Title	Enter part or all of the document's title as it appears in the system.
Folder	Type part or all of the root folder name. <i>Note: You cannot search only by subfolders.</i>
Show Only Favorites	Check this box to return only the versions you have chosen as favorites.
Show All Versions	Check this box to return all versions of the documents.
Date	Enter the start and end date in MM/DD/YYYY format or select a date range from the drop-down calendars.
Alt Name	Type any alternative names under which the document(s) might be stored.
Name	Enter part or all of the document name as it appears in the system.
ID	If the document was assigned a JCL Form ID (common with Content Server z/OS) you can enter that ID here to refine your search.
Format	Enter the format type (e.g., ASC) that you want to search for.
Source	Enter the location from which the document was generated.



Note: The search fields will be the same when searching within one folder in the Content Service directory.

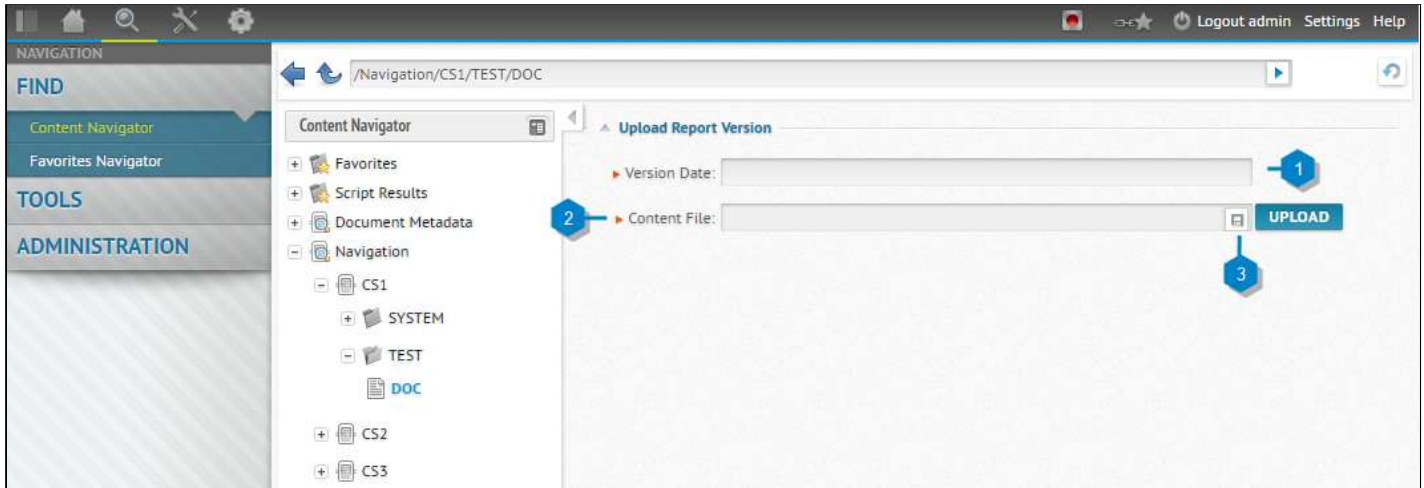
The action menu for documents within content server:



Button	Description
1 Show Report Versions	Shows the navigation window for different versions within the document.
2 View	Hover over this option to display the sub-menu view options, or you can click this option to view in the default Viewer.
3 View in New Window	Hover over this option to display the sub-menu view options, or you can click this option to view in the default Viewer in a new browser window.
4 Download	Hover over this option to display the sub-menu download options, or click this option to download the default format. When you click Download, you can select the Start page and Max Page number to download, as well as select the option to remove page breaks before downloading (if there is more than 1 page in the document).
5 Upload Report Version	Select to open the Upload Report Version to Content Server window.
6 Register Script Execution	Select to open the Register Script Execution on New Document Version window.
7 Add Report to Favorites	Adds this report to your favorites.

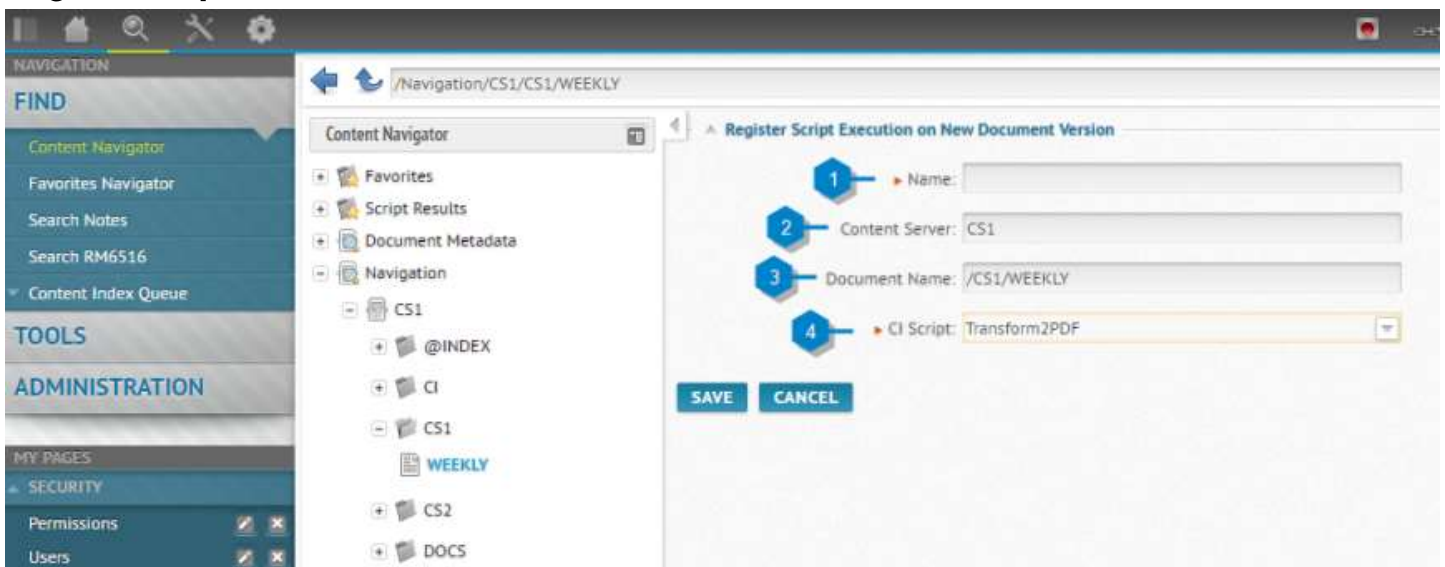
▼ Upload Report Version

When you select the **Upload Report Version** option from the Action menu, the following window appears. This option provides a way for users to upload document versions directly to content server based on permission set up by the system admin.



Field	Description
1 Version Date	Enables a user to specify upload date for a document version.
2 Content File	Enables a user to upload a document version to content store.
3 File Explorer	Opens up a users file explorer allowing users to search and select documents for upload.

▼ Register Script Execution



Field	Description
1 Name	Enter a unique name for the script.
2 Content Server	The Content Server for the document automatically generates in this field. You cannot edit this field.
3 Document Name	The Document path automatically generates in this field. You cannot edit this field.
4 CI Script	From the drop-down list, select the script to apply to the document.