

OFFICE OF THE STATE CONTROLLER

CONTENT CLOUD

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CONTENT CLOUD

- Find and extract information from wherever it is stored and transform and deliver information in the context needed
- DIT Project
- Replacement for XTND/XNET
- Target Dates
 - Testing
 - August/September, 2019
 - Production
 - Latest by December 31, 2019



CONTENT CLOUD

- Quickly and Accurately find and retrieve content
 - Search features
 - Configurable
 - Create Scripts
 - Create individual or shared favorites
 - Access at page/report level
- Transform, Package and Deliver
 - Repurpose structured and non-structured content
 - Use queries
 - Extraction templates
 - Add Notes
 - Package multiple reports into single PDF/Zip

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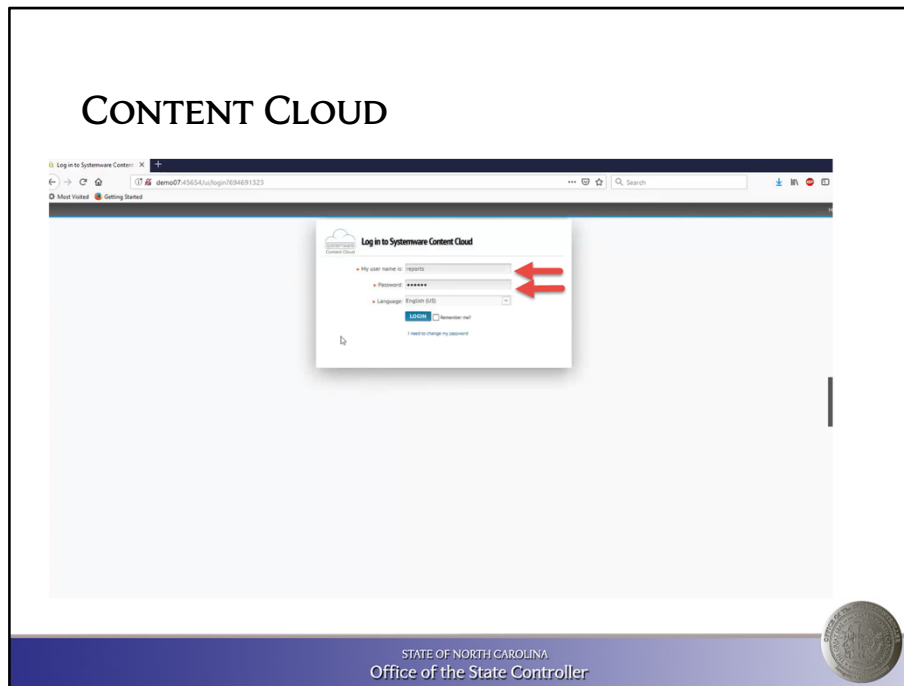


Repurpose into PDF, CSV

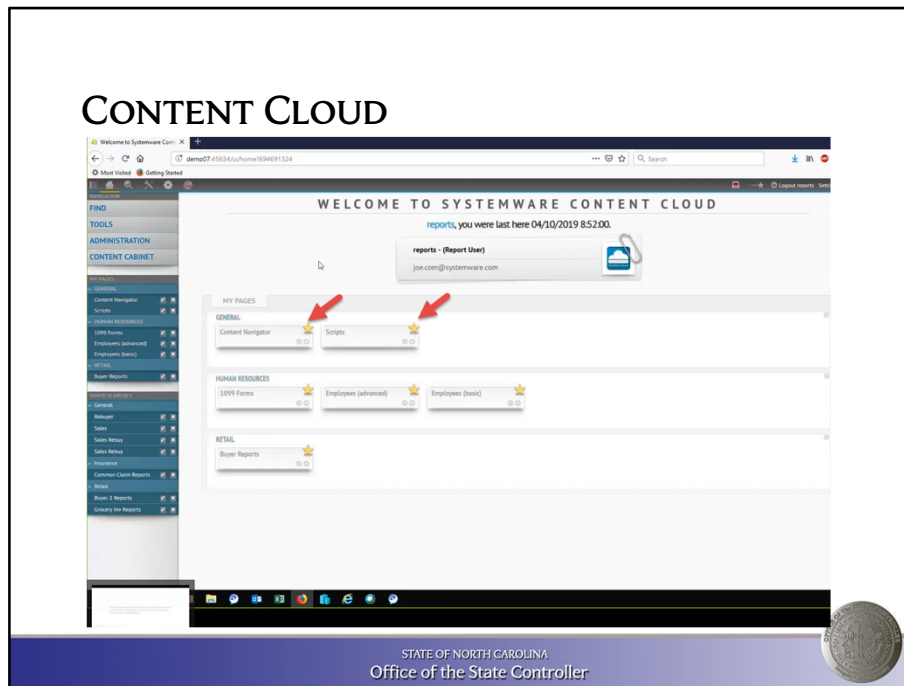
CONTENT CLOUD

- Storage and Retention
 - Records management
 - Share common resources
 - Compress content
 - Restore content and store in cloud
- Security and Compliance
 - Configure user groups, roles, filters
 - Encrypted data
 - Meet regulatory compliance with data masking





We will be given a URL to go to sign on to Content Cloud. There is no software necessary on the client; you will use your browser. As long as you get past the firewall, you can see content. To get past the firewall, this most likely will be your RACF, Bill code and password. Currently, your RACF determines the reports/parts of reports you can view. Each RACF is added to a group, groups are then assigned indexes to view in XPTR.



This is the HOME Page – this is configurable by you for the look and feel you want. You can customized with saved scripts for repetitive searches and other favorites. Over on left side you have your actions. In the middle are things that have been saved for this user. There are buttons at the top of the screen. First one hides the action column; second is HOME; third is to access Content Navigator; The other two are tools and administrative functions. The Content Navigator is where you will go to find your reports. Or you could use the box to enter the content navigator.

Before we continue, let's take a quick look at how reports are structured in XPTR on the mainframe.

CONTENT CLOUD

X 1 V22: Favorites

Row 1 to 8 of 8

Command ==>

Scroll ==> CSR

Commands: PRO - Update Favorites (via Profile)

Options: B - Display on terminal X - List report indices
S - List report versions V - List report views
PRT - Print Q - Add to Work Queue
SQ - Structured Query N - Version Notes

Use END command to exit. Use LEFT command to list more report information.

Opt	Type	Title	Last CMD
	DIR	/CDR	S
	DIR	/DCC	S
	DIR	/DHR	S
	DIR	/DHR/DZA	S
	DIR	COMPUTING SERVICES	S
	DIR	DATA CENTER REPORTS	S
	DIR	INFORMATION TECHNOLOGY SERVICES	S
S_	DIR	OFFICE OF THE STATE CONTROLLER	S

***** Bottom of data *****

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This is a high level look at some of the directories in XPTR. If you select the Controller's Office, (next screen)

CONTENT CLOUD

X 1 V22: Favorites

Row 1 to 11 of 11

Command ==>

Scroll ==> CSR

Commands: PRO - Update Favorites (via Profile)

Options: B - Display on terminal X - List report indices
S - List report versions V - List report views
PRT - Print Q - Add to Work Queue
SQ - Structured Query N - Version Notes

Use END command to exit. Use LEFT command to list more report information.

Opt	Type	Title	Last CMD
	DIR	/OSC/MFS	
	DIR	CASH MANAGEMENT (OSC) /OSC/AKA	
	DIR	CENTRAL PAYROLL (IMS)/OSC/PXA	
	DIR	FLEX BENEFIT (CCC)	
	DIR	NC23 (CICSNC23 REGION)	
	DIR	OSC BEACON INTEGRATION	
S	DIR	P (CICSSCCP REGION)	
	DIR	PRACTICE/TRAINING REGION	
	DIR	TEST (CICSSCCM REGION)	
	DIR	UNIVERSITY REPORTS	
	DIR	WORKMAN COMPENSATION (CCD)	

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You will see an additional breakdown of our directory. The two main regions are P / NC23. Once you select that directory, you will see the detail reports. (next screen)

CONTENT CLOUD

X 1 V22: Favorites

Row 1 to 11 of 607

Command ==> _

Scroll ==> CSR

Commands: PRO - Update Favorites (via Profile)

Options: B - Display on terminal X - List report indices
S - List report versions V - List report views
PRT - Print Q - Add to Work Queue
SQ - Structured Query N - Version Notes

Use END command to exit. Use LEFT command to list more report information.

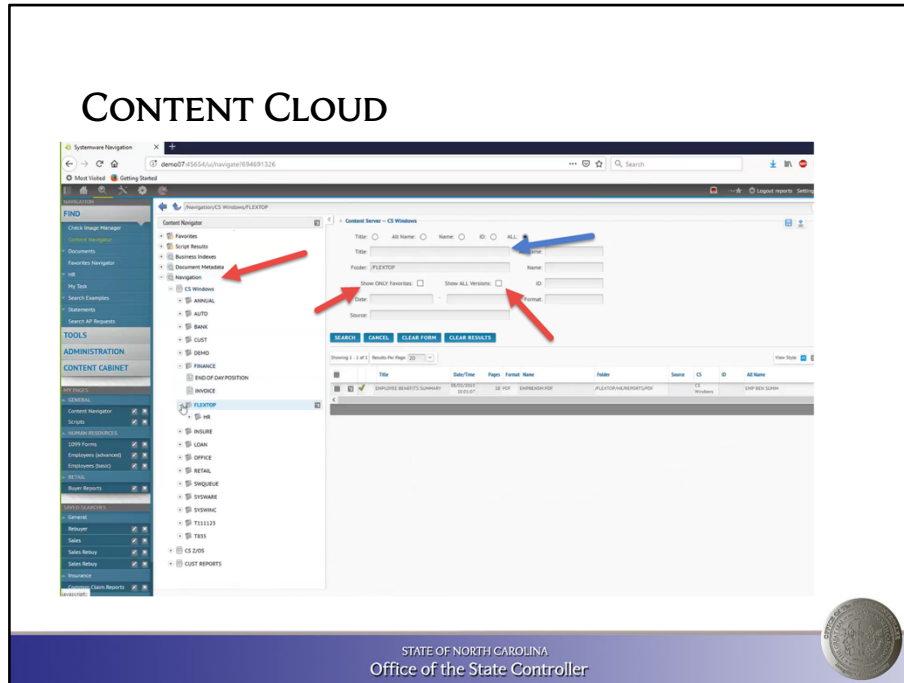
Opt	Type	Title	Last CMD
RPT	OSCOPC	ACH BANK ERROR REPORT	
RPT	OSCOPC	ACH BUDGET CODE PARM LIST	
RPT	OSCOPC	ACH CANCELLED CHECKS	
RPT	OSCOPC	ACH PAYMENT REPORT	
RPT	OSCOPC	AGENCY FUNDS EOY REPORT	
RPT	OSCOPC	AP DENR CGL CHECKS	
RPT	OSCOPC	AP EOY INV ACR INJECTION	
RPT	OSCOPC	AP EOY PRE INC ACR UNF ER	
RPT	OSCOPC	AP EOY PRE INV ACR EXCEL	
RPT	OSCOPC	AP EOY PRE INV ACR INJCTN	
RPT	OSCOPC	AP FEDERAL CLEARANCE	

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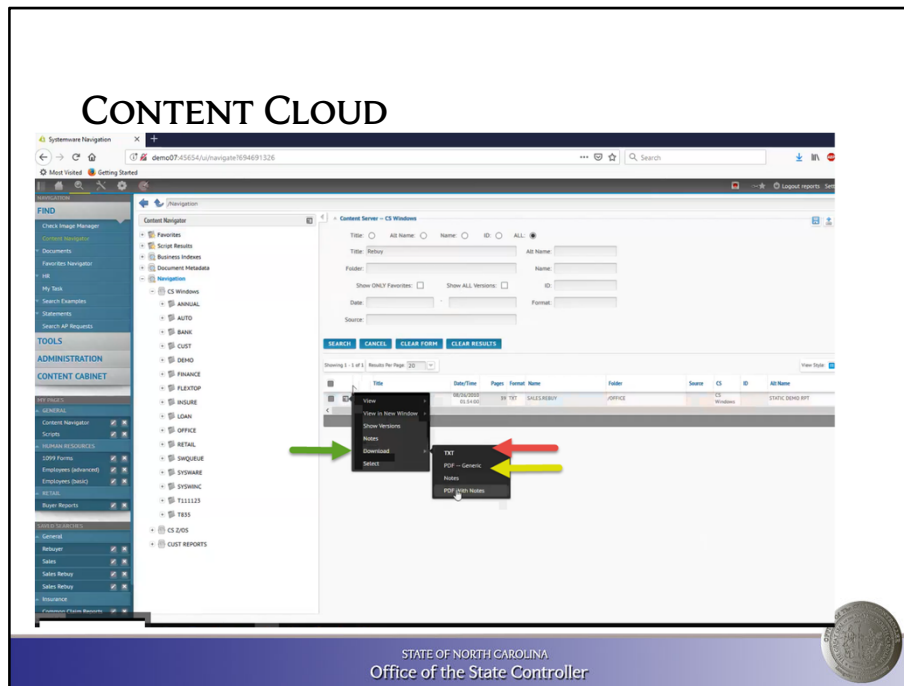


Some users have set their favorites to go directly to the report, skipping the directories. Because of being able to tailor Content Cloud to your own activities, I will assume you will be able to do the same thing.

CONTENT CLOUD



Once you open the Content Navigator, on the left you will have the servers/directories you are allowed to search. A search panel will open when you access the Content Navigator. You can search by Title, Alternate name, name, and form id. You can also specify a date range for reports. You can show only favorites, or all. By default, the last version will display, or click ALL VERSIONS to display all versions. Then click SEARCH to search with the criteria.



You can either click on the report to view, or this button, you can view, view in a new window, show versions, Add/ view notes, or download. If you select DOWNLOAD, you can download to a .TXT file, PDF, PDF with NOTES, or just download NOTES. If you select DOWNLOAD with PDF, will display the report in Acrobat. Next Slide

CONTENT CLOUD

SWCL_COMBINE_04-10-2019_200000_204.pdf - Adobe Acrobat Reader DC

File Edit View Window Help

Home Tools SWCL_COMBINE_0_ X

1 / 40 13.7%

Sign In

Document Content

1 SWCL_COMBINE_04-10-2019_200000_204.pdf

1.1 CS Windows - Title REBUYER REPORT - DEPT - 08-26-2019_01-34-00

1.2 Notes

NO.	DESCRIPTION	UNIT	QTY	UNIT PRICE	TOTAL	AMOUNT	DATE	REMARKS
1	SWCL COMBINE 04-10-2019_200000_204.pdf	1	1	13.7%	13.7%	13.7%	08-26-2019	1.1 CS Windows - Title REBUYER REPORT - DEPT - 08-26-2019_01-34-00
2	SWCL COMBINE 04-10-2019_200000_204.pdf	2	2	13.7%	27.4%	27.4%	08-26-2019	1.2 Notes

Export PDF

Adobe Export PDF

Convert PDF Files to Word or Excel Online

Select PDF File

SWCL_COMBINE_04-10-2019_200000_204.pdf

Convert to

Microsoft Word (.docx)

Document Language

English (U.S.)

Convert

Create PDF

Edit PDF

Comment

Combine Files

Organize Pages

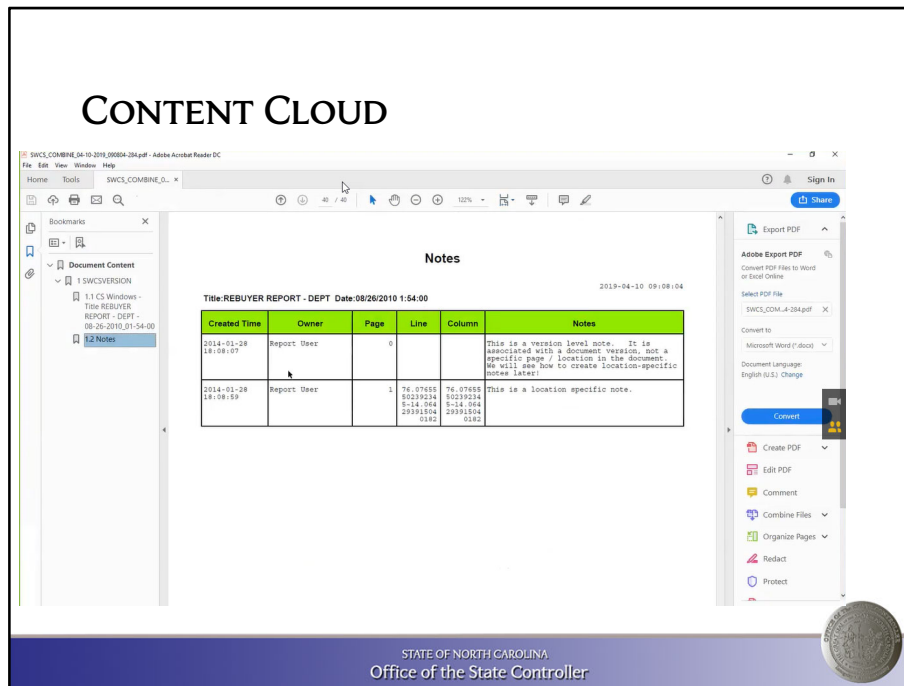
Redact

Protect

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Notice the Document Content – you have the report information – and a second section with NOTES. Next slide

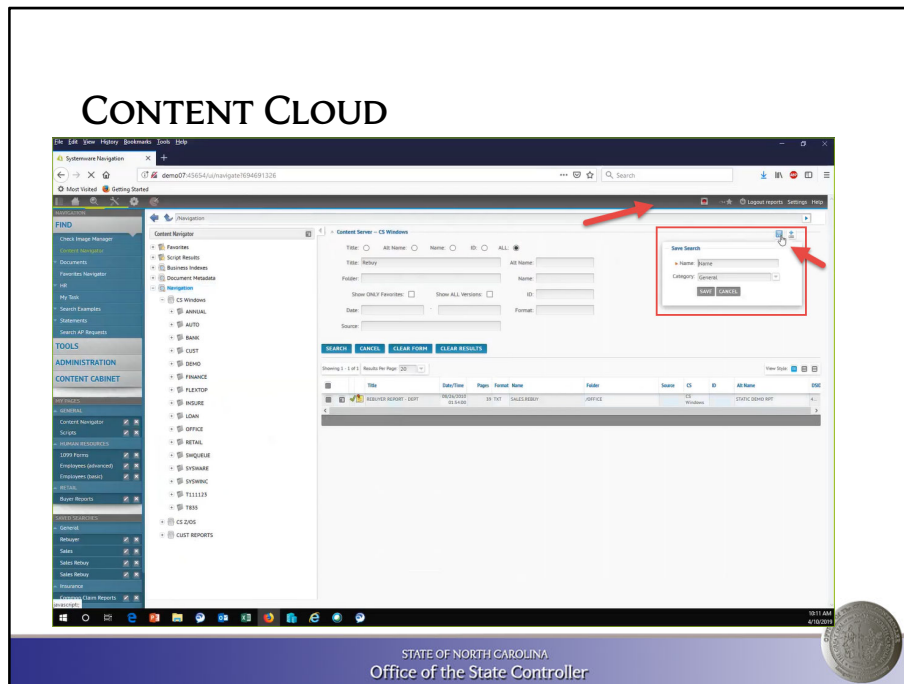


Once it's in Acrobat, you can do anything you want with the PDF – email, save, etc...
If you just click on the report to view, the actual report will display in Content Navigator.

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Once the report is displayed, you have a navigation bar at the top of the page to do functions. First, you can zoom the report; basically enlarge the text. Second you have a ruler function. Next, you have a select text. You can select parts of the report.. And just print that small area; or perform copy/paste functions elsewhere. Print (3) – will print the current page. Next two I don't think are very useful, will put highlighted page breaks. Turn on and off; Next 4 buttons are how you page in Content Navigator. First button will take you to the first page; last button to the last page; and forward and backwards. OR you can put what page you want to go to in #5. Number 6 is how you can search for text in the report.



SO.. Back on Content Navigator – if I search for a particular report quite often, I can save that search under specific category. You can retrieve the saved searches by clicking on the next icon. A list of all saved searches will appear. Will load the search into the search screen. This in itself does not seem to be that useful, but combining this with recording a script can be very useful. IF we start recording, similar to recording a macro in EXCEL, every keystroke will be saved in the script. So from here we load the search criteria, then click search. Then click our report and it's displayed. (next screen).

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Title/REVENUE REPORT - DEPT Date:06/26/2010 1:54:00

APPLY

MERCH	DEPT	VENDOR	SKU	ITEM	NO	STORE	DAYS	AVG-WKLY SALES	LOST SALES	RETAIL
2	0373	184-853	C30 MINI DISKETTING CASSET	2	5	14.27	5.71	22.78		
2	0373	184-986	3M 4407 OVERHEAD PROJECT	1	2	35	10	14.99		
2	0373	184-991	3M 9700 PORTABLE OVERHEAD	9	18	6.01	5.93	864.91		
2	0373	442-962	3M PORTABLE PROJ- 2000	5	17	3.41	2.00	810.16		
2	0373	442-970	PROJECTOR OVERHEAD, 3M, 800	31	66	22.29	8.77	2,645.17		
2	0373	551-821	9200 OVERHEAD PROJECTOR	2	8	4.01	2.28	911.97		
2	0373	964-999	PROJECTOR, OVERHEAD, PORT	2	14	9.91	3.91	2,150.46		
2	0373			52	110	54.75	24.70	7,521.24		

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Maybe select a particular budget code; fund, or group of funds, etc. (Similar to how you can select by indexing). You can use this to filter the information in the report. And Apply.. Now we have it trimmed down to a subset of data. So if we want to perform some analytics, we could load this into EXCEL. So now we will select the ANALYZE function .

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The screenshot shows the 'CONTENT CLOUD' interface. A purple box highlights the 'Content Options' section. Inside this box, three yellow arrows point to the following settings:

- File Extension Type:** .csv
- Content Extraction Category:** Sales Report \$1
- Content Format:** CSV

Below these options, a yellow arrow points to the **Download** button. The interface also shows a table titled 'ITEMS MANAGEMENT SYSTEM' with columns for DEPT, VENDOR, SKU, ITEM, NO, STORE, DAYS, AVG-WKLY SALES, LOST SALES, and RETAIL. The table contains data for various items, including 'C30 HENS DELTATING CASSET', 'OVERHEAD PROTECT', 'PORTABLE OVERHEAD', 'PROJECTOR, OVERHEAD, 3M, 910', and 'OVERHEAD PROJECTION'.

Select the format, (CSV), and click download.. Next screen

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The screenshot displays the Content Cloud application interface. A modal dialog is open, asking the user to choose an action for a file named 'analysisresults.csv'. The dialog options are:

- ☒ Open in Microsoft Excel (default)
- ☐ Save File
- ☐ Do this automatically for files like this from now on.

The background shows a report titled 'TAXPAYER REPORT - DEPT' for the week of 2010-08-21. The report includes a table with columns: MERCH, DEPT, VENDOR, SKU, ITEM, NO, STORE, AVG-WLY, LOCT, and RETAIL. The table data is as follows:

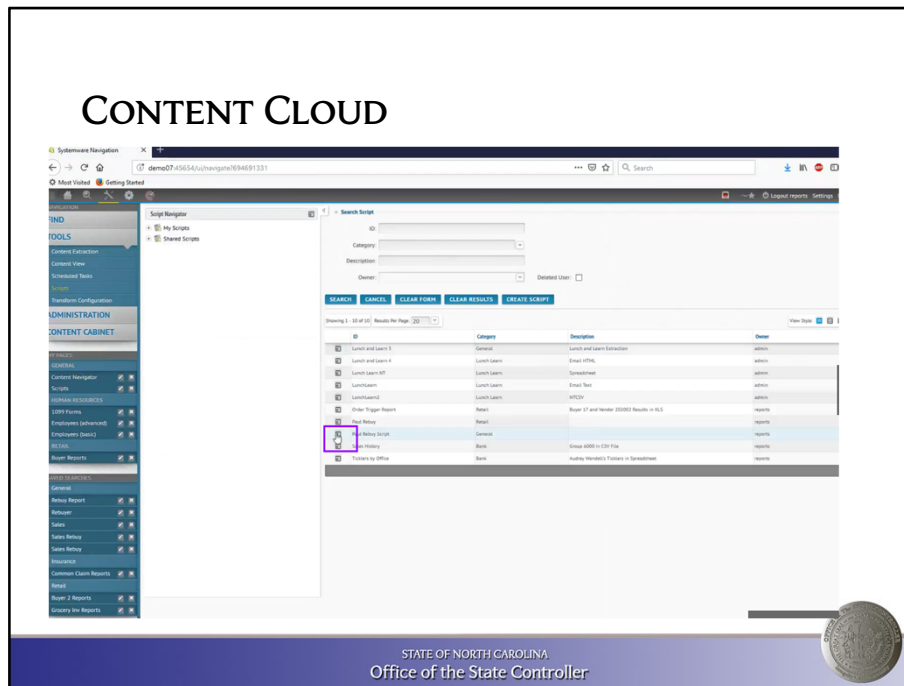
MERCH	DEPT	VENDOR	SKU	ITEM	NO	STORE	AVG-WLY	LOCT	RETAIL
2	0373	184-853	C30 WINE DECANTING CASSET	2	5	14.27	5.71	22.78	
2	0373	184-956	3M 4407 OVERHEAD PROJECT	1	2	1.15	1.00	18.99	
2	0373	184-994	3M 9700 PORTABLE OVERHEAD	9	18	6.01	1.93	964.91	
2	0373	442-962	3M 9700 PORTABLE PROJ.	5	17	3.01	2.00	830.56	
2	0373	442-970	PROJECTOR OVERHEAD, 3M, 950	31	66	22.39	8.77	2,645.57	
2	0373	155-811	9500 OVERHEAD PROJECTOR	2	8	4.01	2.18	911.97	
2	0373	964-999	PROJECTOR, OVERHEAD, PORT	2	14	3.91	3.91	2,150.46	
2	0373			52	150	14.75	24.70	7,321.24	

Will ask you if you want to save; or Open in EXCEL...

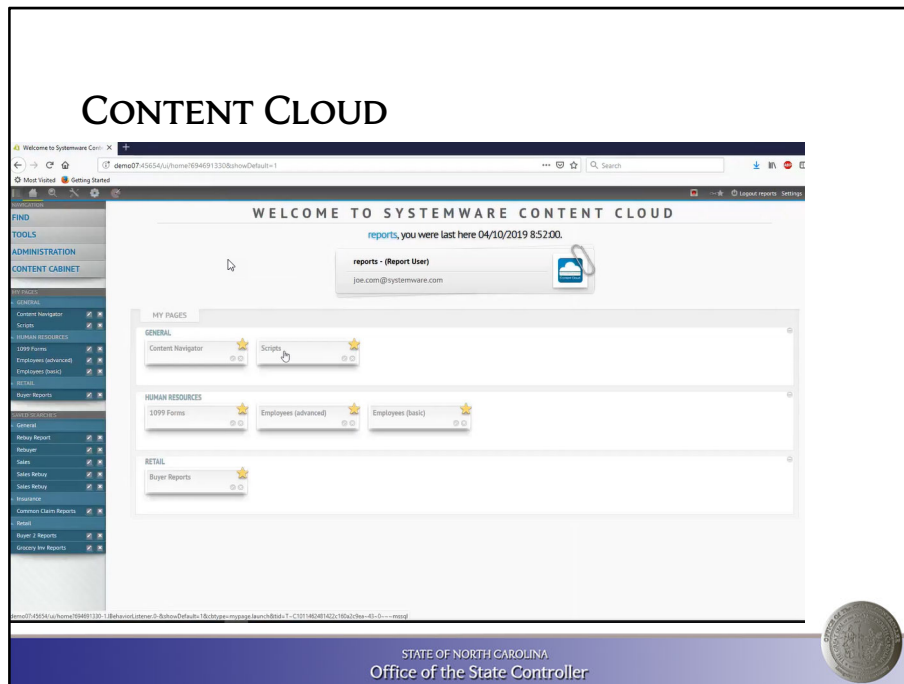
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MERCH	DEPT	VENDOR	SKU	ITEM	DESCRIPTION	RETAIL	LOST	SALES	AVG	WPLY	SALES
2	373	384-984	3M 480 OVERHEAD PROJECT			84.59	0.1	8.35			
2	373	384-994	3M 5700 PORTABLE OVERHEAD			964.91	1.93	6.01			
2	373	440-960	3M PORTABLE FROG 2000			610.56	2	3.81			
2	373	440-970	PROJECTOR.OVERHEAD.JAN.910			6,645.57	8.77	22.39			
2	373	505-621	3000 OVERHEAD PROJECTOR			911.97	2.88	4.01			
2	373	964-999	PROJECTOR.OVERHEAD.FORT			2,106.46	1.91	3.91			
2	373					7,321.24	24.7	24.75			

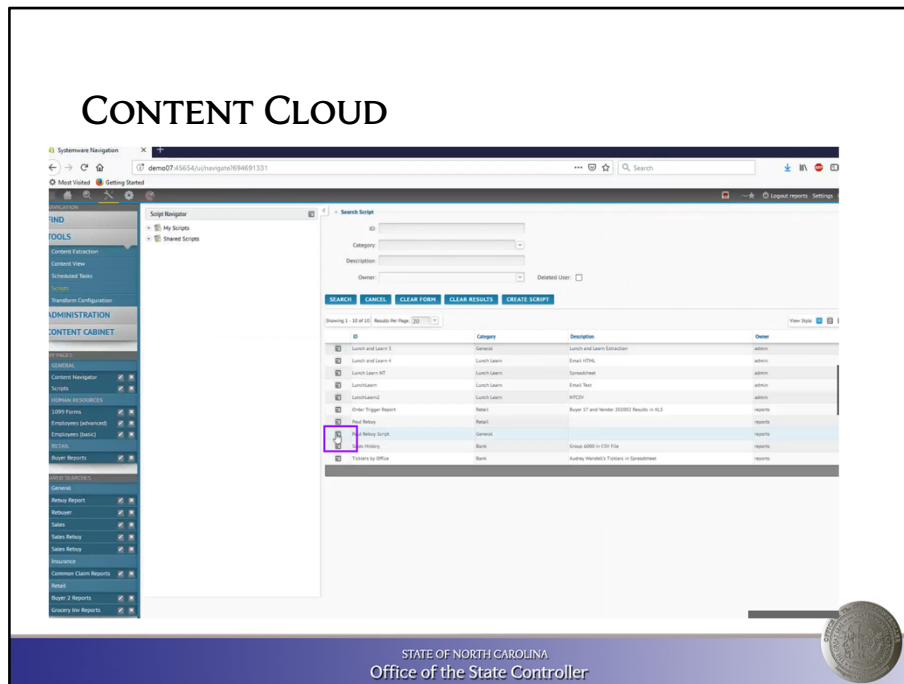
And here it is in excel. So.. Remember we have been recording all these steps as we went along. Now if we stop the recording,



When you stop recording, Content Navigator will ask you if you want to save this script. If you say NEXT, this is the screen that will appear. Give is a unique id, select a category, you can make them private, share the script or just share the results. Then save and close.



IF you return to the Home page, remember you see the box that says scripts. Click on this. Next screen



A list of all your saved scripts will display. The icon to the left of the script is an action icon. You can run it and all steps will execute and you will end up at the EXCEL spreadsheet. There are also copy, delete and edit functions. You can also schedule this script. If you select schedule script, the next screen will appear

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Schedule Task

Task Definition

Name: Paul Kelly

Description:

Task Type: Event-driven Script

Script ID: Paul Kelly Script

Schedule Type: Periodic

Use the following fields to configure when the task should run. In each field, if no options are selected, it is the same as selecting all the options. For example, to run the task once a day on Monday, Wednesday, and Friday, use the following values:

- MINUTES: 0 - run on minute 0 (leave empty for all minutes)
- HOURS: 0, 12 - run at 0 and 12 (leave empty for all hours)
- DAY OF MONTH: (leave empty for all days of month)
- MONTH: (leave empty for all months)
- DAY OF WEEK: Monday, Wednesday, Friday (leave empty for all days of week)

Minutes: Choose Option(s)

Hours: Choose Option(s)

Day of Month: Choose Option(s)

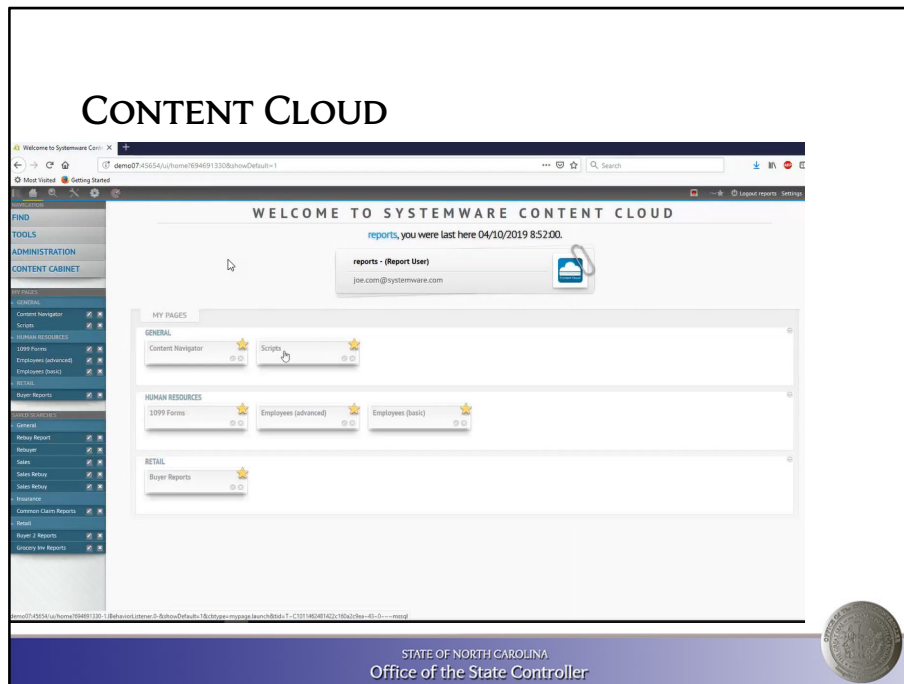
Month: January

Day of Week: Choose Option(s)

Time Zone: America/Chicago

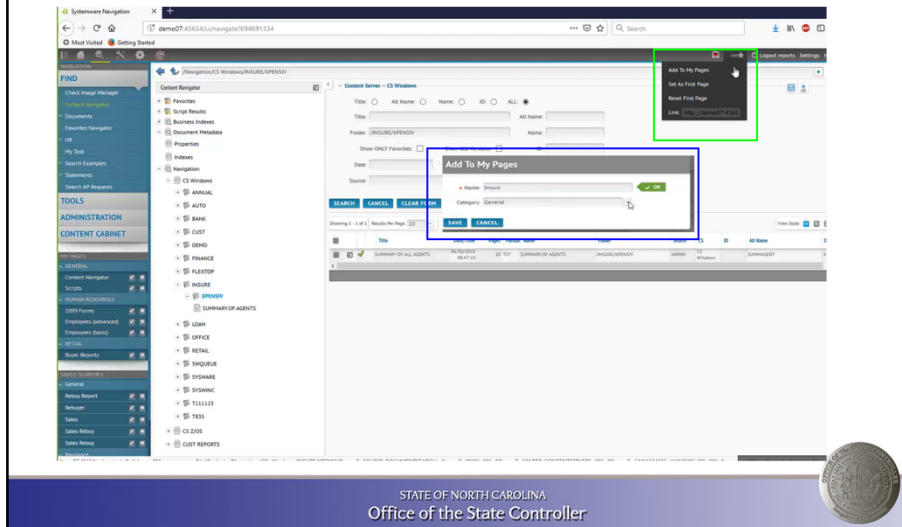
Save Cancel Clear Form

Periodic, first of month, every Friday, the hour you want it run, once a year.. Lots of different options. Then save. Let's now go back to the Content Navigator's Home page.



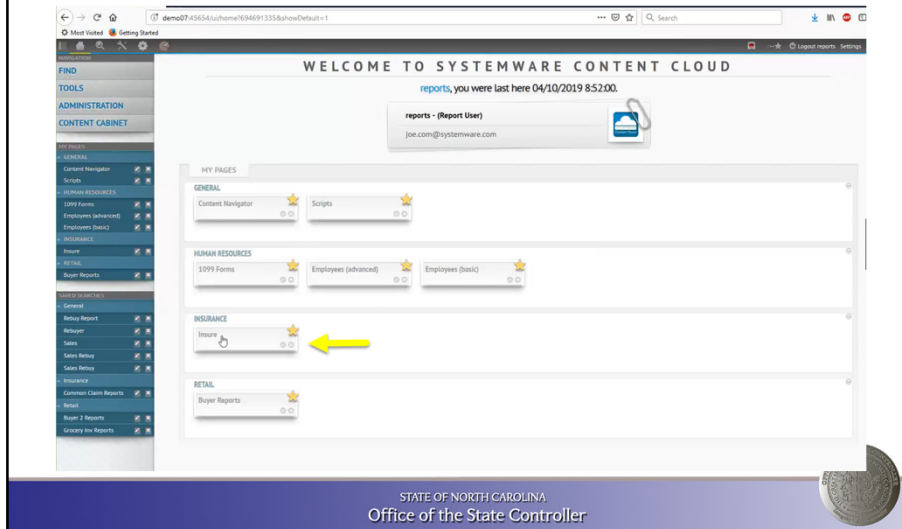
As I said earlier, you can tailor your home page the way you want to make it more efficient for your job. How to you do that? After you get to the place you want to go to, (next screen)

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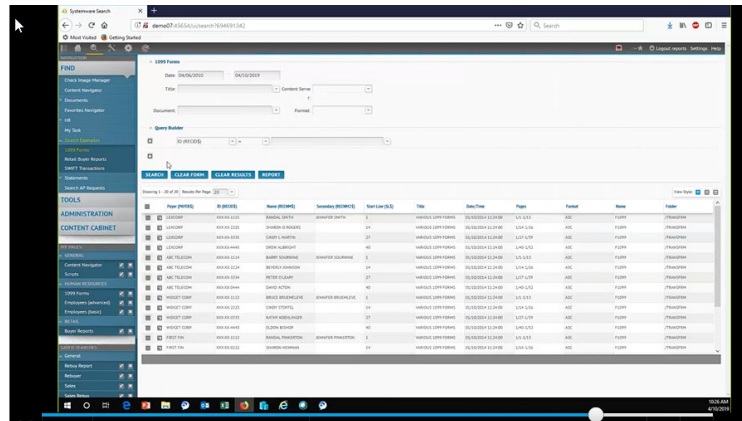
Click on the Star icon and select “add to my pages”. Select the name and the category where you want it to show.

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Now when you go back to the Home page, you have a one click method to get directly to a report. You can also remove items from your home page by clicking the icon at the bottom right.. Or edit the category by selecting the next icon.

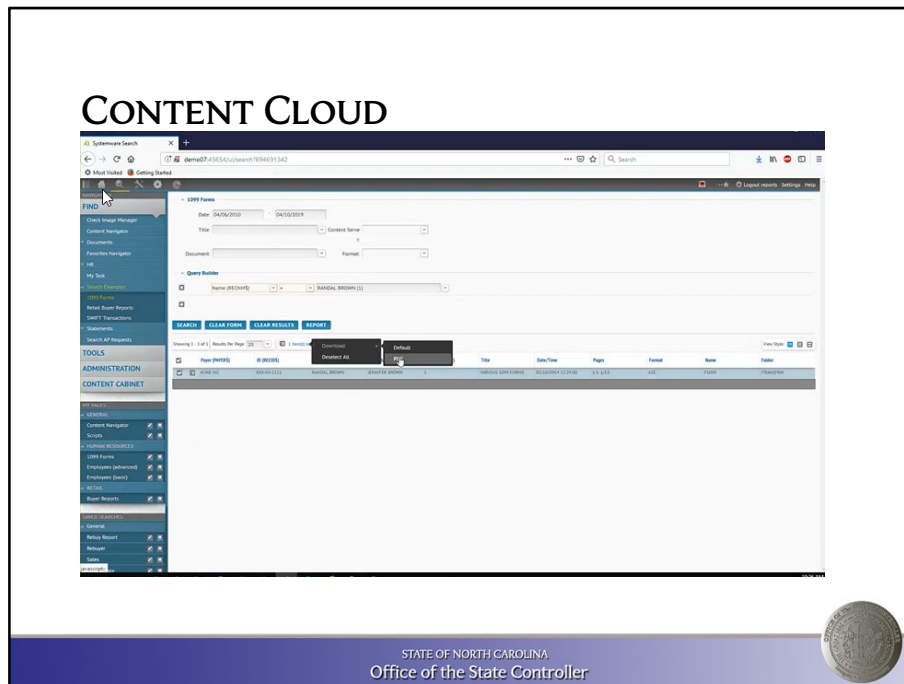
CONTENT CLOUD



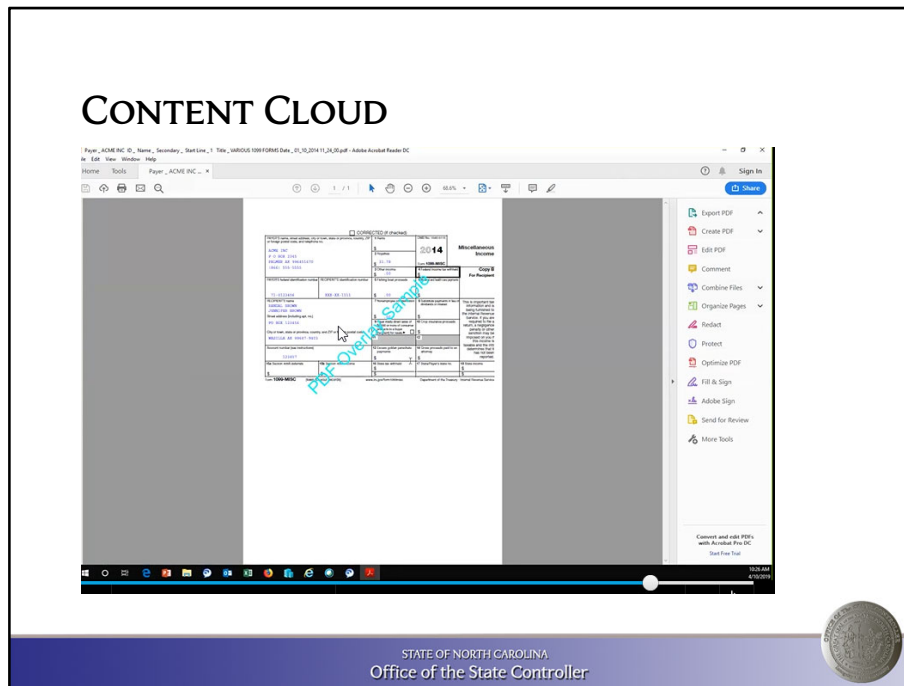
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This is a special search that was set up to search for 1099 data... Just wanted to show you what you might could do with this; Once you select the record or records, you can select download into a PDF



And this is what would be displayed:



And this is what would be displayed – the form overlay is placed on top of the information..
So this is something we could think about for reprinting W-2/1099 or any kind of forms...

CONTENT CLOUD

- Training/Information
 - DIT
 - Will be offering “Train the Trainer”
 - Webinars
 - TechShare group for Content Cloud
 - User group for Content Cloud
 - OSC
 - Web Based training oriented towards NCAS/CMCS
 - Quick Reference Guide



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- Questions???

