CONTENT CENTRAL NAVIGATION GUIDE

LOGGING IN:

Using Internet Explorer, navigate to the Telapex Finance home page by typing "finance" into the address bar.

> *Note: The "http://" in front should not be necessary when accessing from a computer on the company's network.*

Click on the *Content Central* icon.

Enter your normal windows username and password and click *Login.*

> *Make sure the "Domain" field is populated as shown. If not, click the drop-down arrow to the right to select "MG.Telapexinc.com" from the list before entering your username and password.*

The Content Central Home Page should display as follows.

GENERAL CONCEPTS:

Content Central (CC) is an application Telapex has acquired to manage the various types and sources of documents that have been, and will continue to be, accumulated by Telapex and its subsidiaries. This includes, but is not limited to, billing reports kept as historical archives, tax returns, regulatory filings, bank records, and ledger support documents.

Capture is the term used by CC to describe the act of loading one or more documents into the system. All documents usually contain text or other data that can be searched for retrieval. When paper images are *captured* from a scanner or other input device, CC converts them to PDF files to allow for maximum search capabilities.

Once a document is *captured,* it must have certain document properties, also known as index fields or tags, populated so that all content can be found logically, quickly and accurately. In CC, the act of assigning these index values is called **coding** the document. These index values are used to determine the folders in which they are stored, the file names used when saving the document, and for searching to find just what is needed.

Each document saved in CC is described by a **document type**, which serves as a template for the document. These templates define security permissions, fields for document properties to be populating during *coding*, and more.

A **catalog** is a grouping of related documents within the system.

For the Telapex system:

Catalog represents the combination of the department responsible for document administration and the company that owns the document. All documents related to accounting, tax, & billing records are stored in catalogs beginning *ACCTG_* with the {Oracle} company number on the end. For example, Telapex's documents are stored in the ACCTG_800 catalog.

Document Type represents the type of document or information being stored. Examples are *Account Recons, Billing Reports,* and *Tax Returns.* For the most part, all *ACCTG* catalogs contain the same document types.

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**.

QuickSearch box (located here or in the right-center area of the main menu on other screens) - Enter a query here and the information provided will be used to search all document types where you have the search permission.
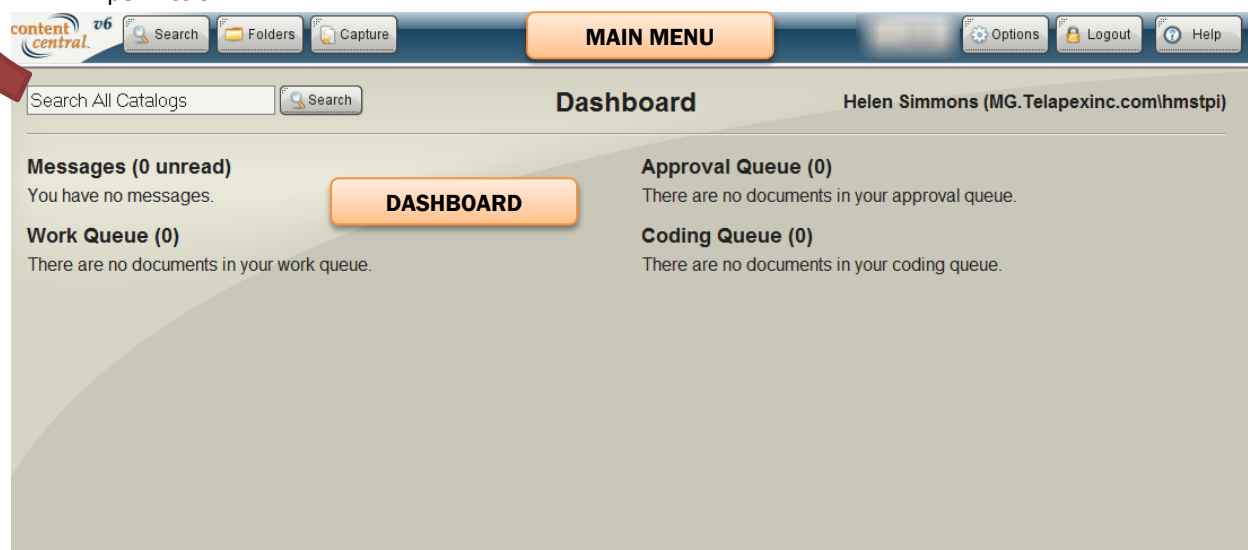
SEARCH

Selecting the **Search** button will provide a page to allow you to enter partial or full details to have Content Central locate and return a list of all documents in the system that meet the search parameters.

FOLDERS

Selecting the **Folders** button will provide a Windows Explorer like folder listing to allow you to browse to the desired document(s) based on their indexed values.

CAPTURE

As mentioned before, all documents that are *captured* must be **coded** in order to define how the document is filed and described for future retrieval. *Coding* is done either at the same time as the *capture* (termed "pre-capture coding" and best when capturing 1 document at a time) or at some point after the document is captured (or "post-capture coding" which is best when capturing many or batches of documents).

OPTIONS

The **Options** button will open an additional menu that will allow you to update various settings that are specific to your user account. Refer to the *Content Central Options Guide* for more detailed information.

DASHBOARD:

The Dashboard is the central part of the Content Central Home Page and displays your most recent **Messages**, **Approval Queue** documents, **Work Queue** documents, and **Coding Queue** documents. Clicking on any of these items will take you to that specific page in Content Central.

The <u>Dashboard</u> can be accessed at any time from any location by clicking the Content Central logo in the top left of the main menu.
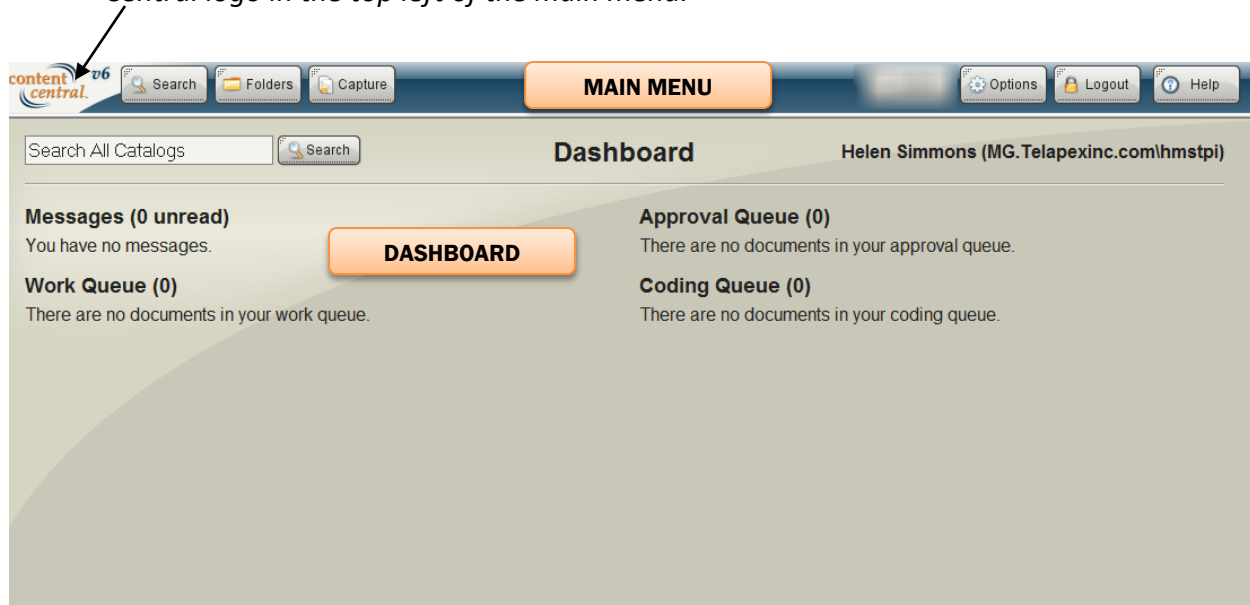
MESSAGES

The **Messages** panel / folder contains system messages and notifications. These may originate from other users requesting that a document be checked in or from the system indicating arrival of new documents in your *Approval Queue* or *Work Queue.* Some notifications can be enabled or disabled in your **User Preferences**.

APPROVAL QUEUE

The **Approval Queue** panel / folder contains documents that have been routed to you based on a predefined approval process.

WORK QUEUE

The **Work Queue** panel / folder contains documents that have been routed to you on an ad hoc basis…whether by a predefined workflow or another user.

CODING QUEUE

Any documents that are captured using *Post-Capture coding* or *Versatile coding* must be fully coded before they will be saved into the system. The **Coding Queue** contains any documents that need coding to be entered or completed.

FOLDERS:

To locate a document by expanding the various levels of document folders, click on the FOLDERS button.
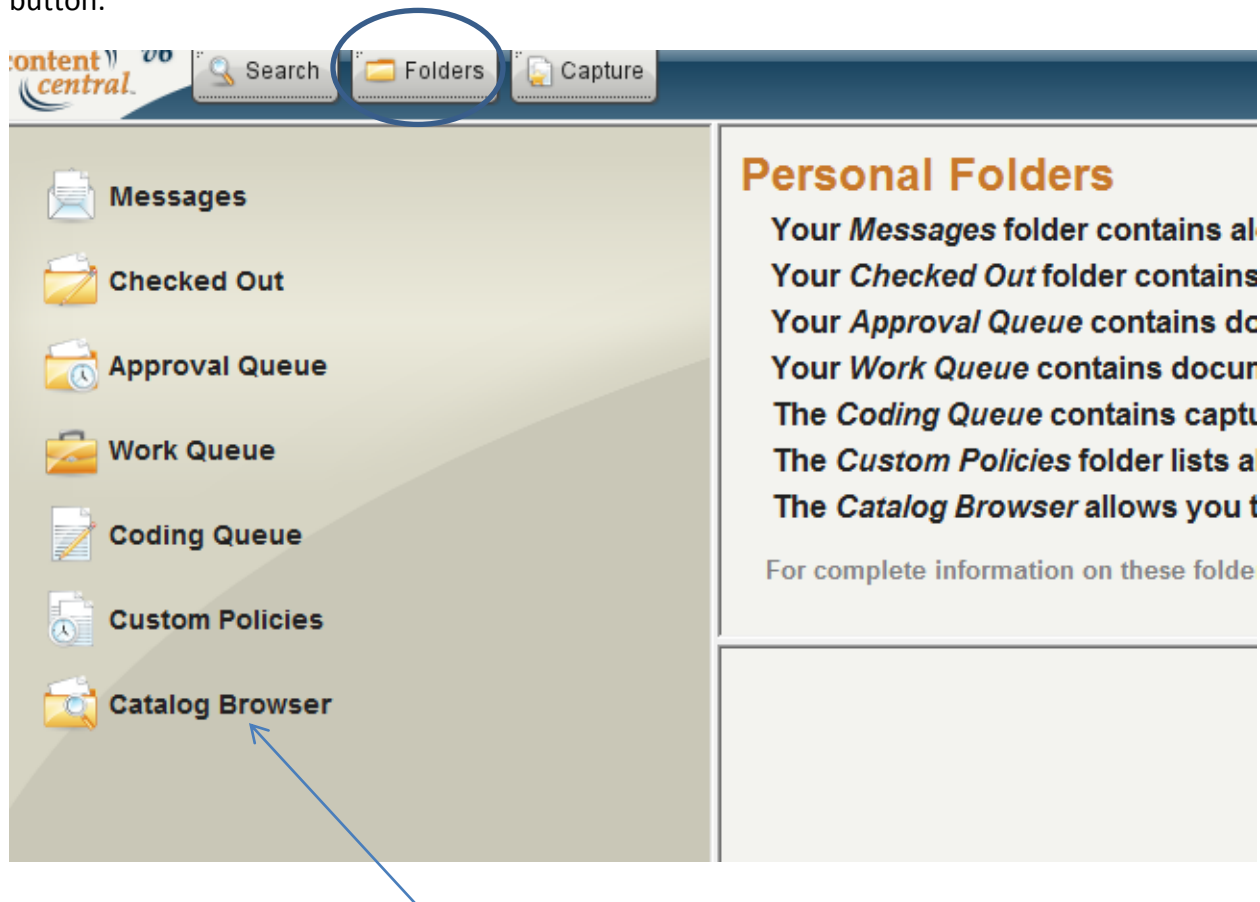
Then click on **CATALOG BROWSER**.

This will display a folder tree, much like when browsing folders in Windows, that can be navigated to find the desired document.

All Content Central documents, at a minimum, must be assigned to a *Catalog* and a *Document Type.* For the Telapex system:

> ***Catalog*** represents the combination of the department responsible for document administration and the company that owns the document. All documents related to accounting, tax, & billing records are stored in catalogs beginning *ACCTG_* with the {Oracle} company number on the end. For example, Telapex's documents are stored in the ACCTG_800 catalog.
>
> ***Document Type*** represents the type of document or information being stored. Examples are *Account Recons, Billing Reports,* and *Tax Returns.* For the most part, all *ACCTG* catalogs contain the same document types.

In the catalog brower, the first folder level represents the *Catalog* and the second level is the *Document Type*. Additional folder levels and filenames are uniquely defined for each document type.

Click on the [+] beside each desired folder to see its contents. For an example, we'll see what account reconciliations are stored for Telapex. First, open the Telapex Accounting <u>catalog</u> by clicking the [+] beside *ACCTG_800* and then find and open the folder for the *Account Recons <u>document type</u>*. Within this particular document type, the next folder is the accounting period.

> *All of the folders shown below may not be the same in your view. You will only see the folders to which you have been granted access.*
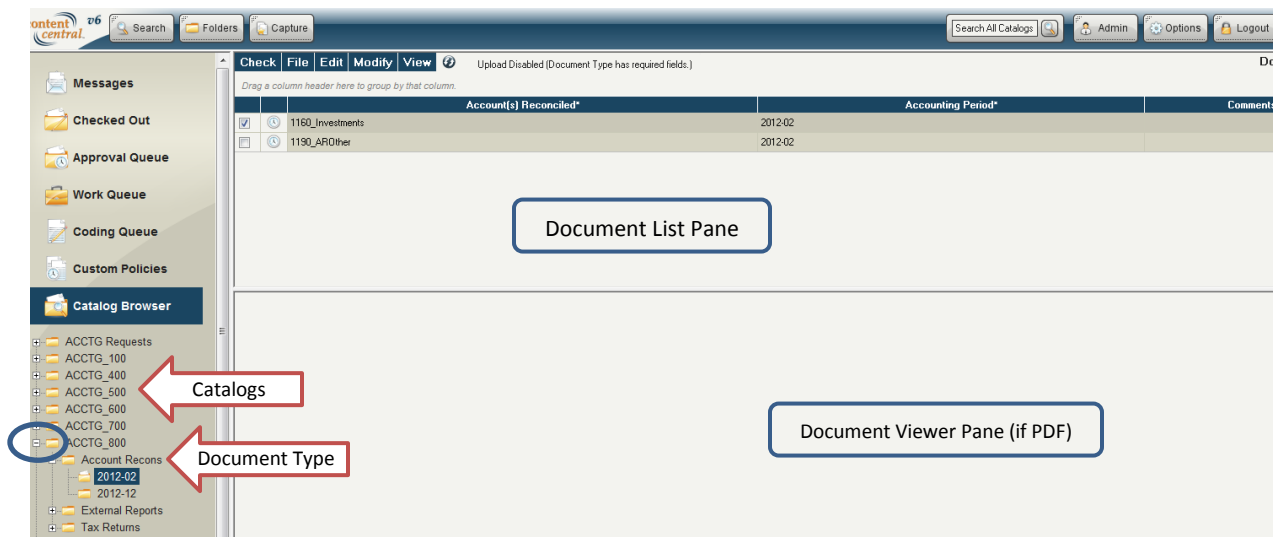
The absence of a [+] to the left of the listed accounting periods indicates that this is the lowest folder and all documents are stored at this final level. In this case, specifically, there are documents in the system for February and December of 2012.

By clicking on the desired accounting period, 2012-02, a listing of all of the documents in that folder automatically appears in the "Document List" pane. The first document in the list will be opened automatically unless your *Preferences* are changed to turn this feature off (Appendix A).

Clicking anywhere on the document in the <u>document list pane</u> that you would like to see, except for the check box to the far left, and it will be opened.

> *If the document is a PDF document, it will display in the <u>document viewer pane</u>.....*
> *Any other type of document, like Excel or Word documents will show the screen below...*
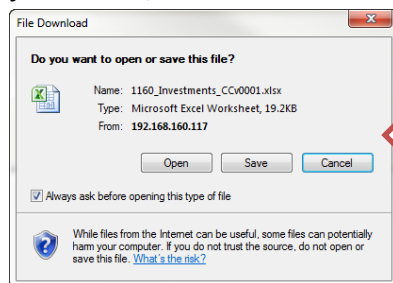
> *If a yellow bar appears in the browser that starts with "To help protect your security....", see "Trusting Content Central" in the <u>Content Central Troubleshooting Guide </u>or contact the TNI Help Desk.*

SEARCH:

When you need to locate multiple similar documents or just a document which you aren't sure where it could be stored in the *Catalog Brower*, select the **Search** button from the main menu.

2 Access previously saved searches here

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Unless this box is checked, only the current versions will be searched.

Selection of a *Catalog* will then present a list of *Document Types* which, when selected, will present the applicable index fields for searching.

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Check here, provide a *Saved-Search Title* and *Apply* to save the current query.

Like the *Catalog* Browser, this query box will appear in the left frame of your browser with the resulting document list appearing in the upper-right frame.

A search can be performed in 3 different ways:

1. Select one or more catalogs and document types, enter criteria in one or more field search text boxes, and select the [Search] 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.

2. Select an existing query from the *Saved Searches* drop-down list, if available. The saved query will be populated automatically, and the search will be performed automatically if the appropriate option has been enabled per Appendix A. Otherwise, you'll simply need to press the [Search] button after selecting the Saved Search.

3. Search 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.

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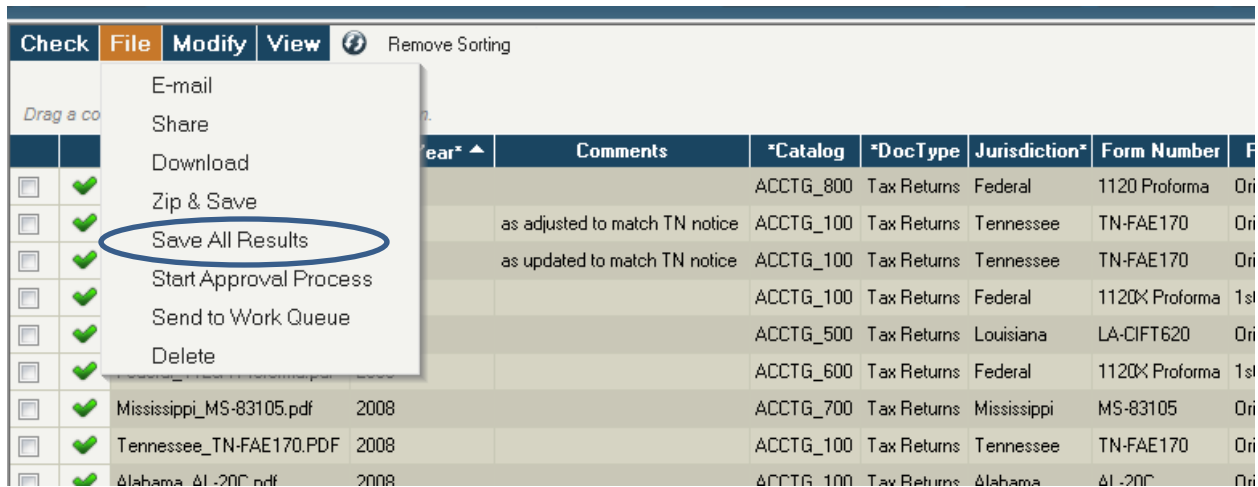
You may export the full list of search results, which may extend beyond the number of results displayed in the results grid, by selecting the *Save Results* menu item from the **File** menu. The data will be exported to an XML file based on the columns visible in the results grid. You will be provided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

DOCUMENT LIST PANE NAVIGATION:

Each row in the *"Document List"* contains a <u>checkbox</u> at the beginning of the row. These checkboxes may be selected to perform document actions on one or more 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 *CheckOut* status of each document in most document lists as defined below:

Other useful features of the grid include:

- Column Sorting – click the header for the desired column to toggle between ascending and descending sorts. To remove sorting, select the **Remove Sorting** link next to the menu bar.
- Field Grouping – 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 - Select the 🗷 icon to export the information contained within the grid to Excel.

DOCUMENT HISTORY:

At any time, from any queue/document list in CC, you can view the complete history of a selected document.

From the *View* option on the queue menu, select *Document History.*
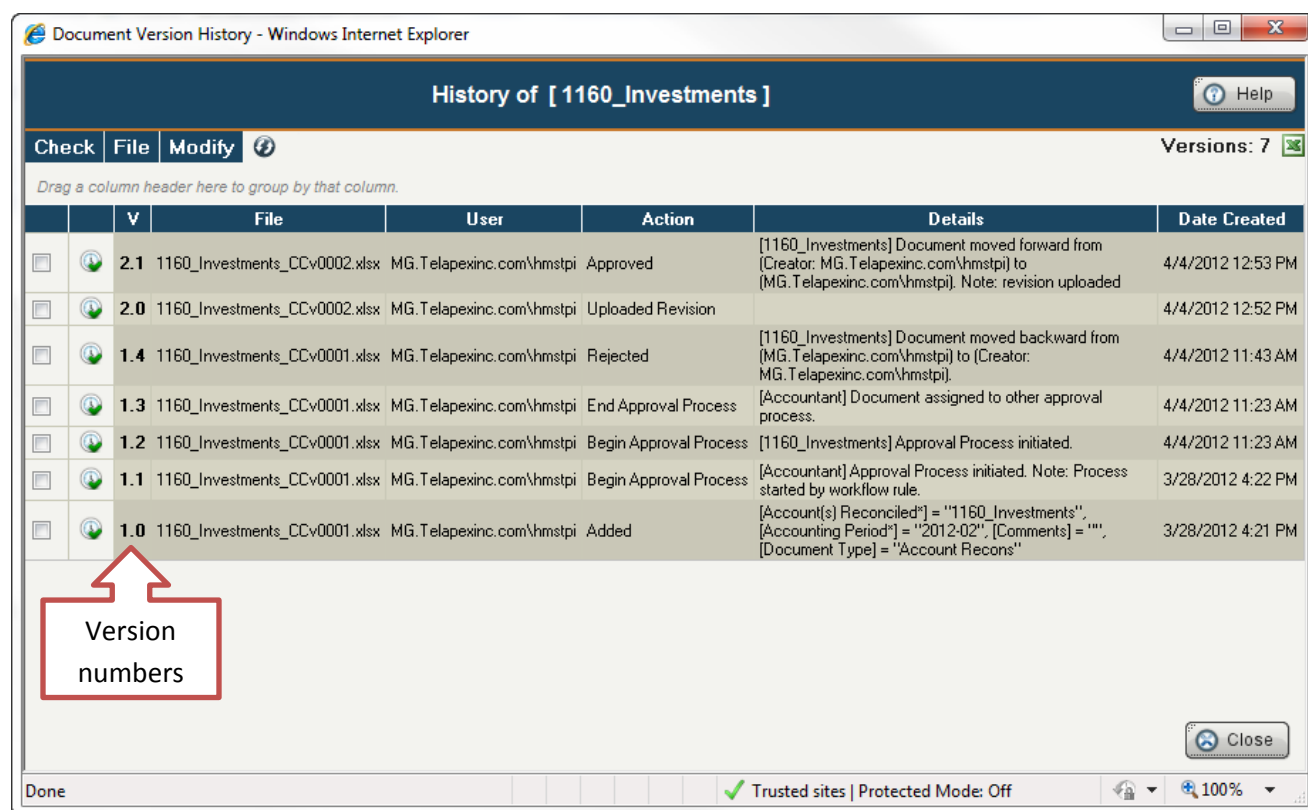
A window showing the document's entire history will display. Note that when the document is replaced, edited or a new version is uploaded, the *Major Version* number increments by a whole number… in this case from version 1.x to version 2.x.   *Minor version* numbers simply indicate a movement of that major version between various stages within the CC system.