

COMPANION DATA SERVICES (CDS)

DOCFINITY

END-USER GUIDE

DocFinity Implementation

**University of Washington - College of Arts and
Sciences: HR**

July 2022

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Logging In

To access the main DocFinity application, enter its URL in a browser. DocFinity is built on responsive web design principles and will open the platform-appropriate version of DocFinity.

TEST system URL: <https://edmstest.uw.edu/> will redirect you to <https://uw.cloudtest.docfinity.com/docfinity/app/?auth=oidc&oidcp=uw>

PRODUCTION system URL: <https://edms.uw.edu/> will redirect you to <https://uw.cloud.docfinity.com/docfinity/app/?auth=oidc&oidcp=uw>

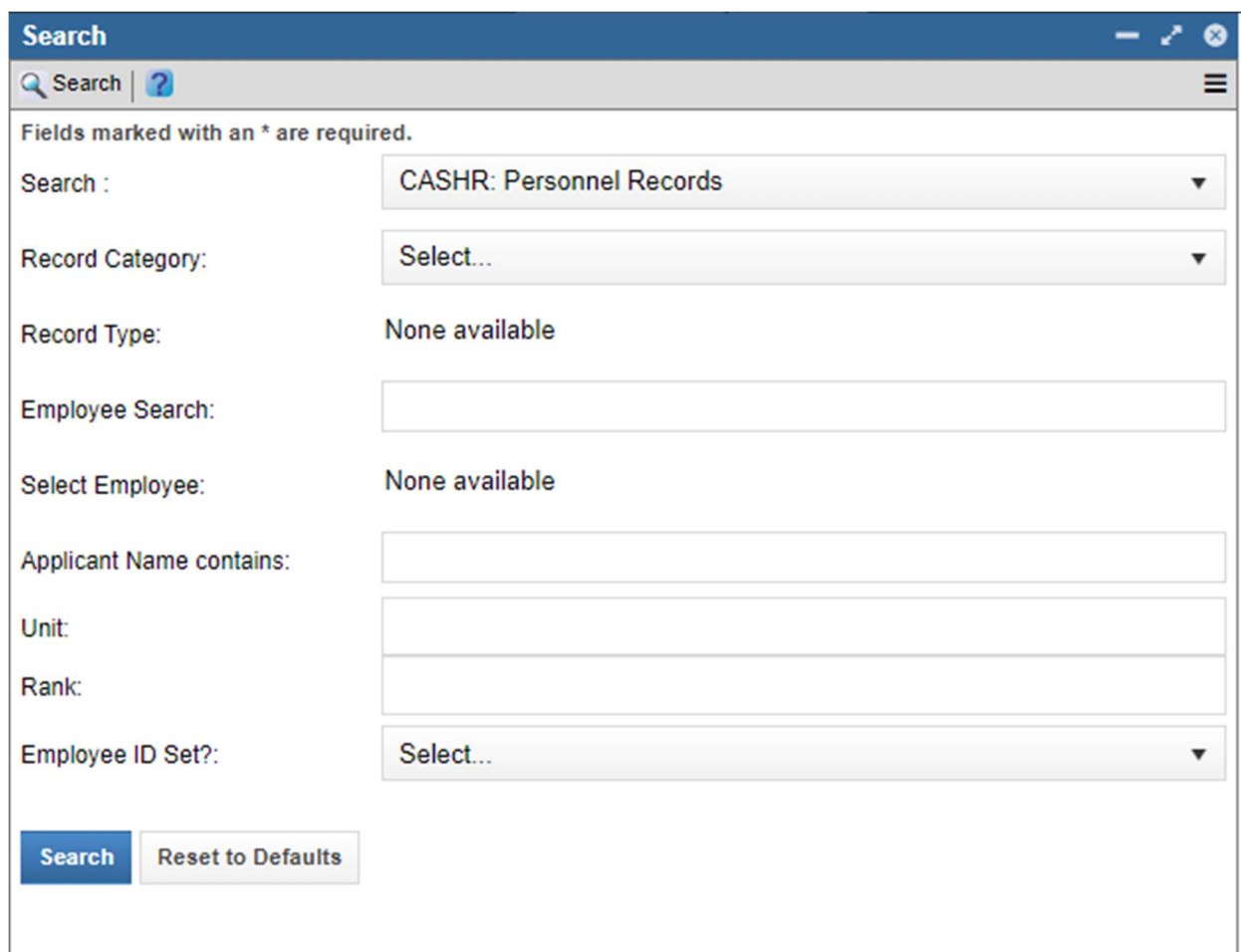
You will be prompted for your UW NetID and password to access the system. Current UW staff (excluding contractors) will need to sign in with two-factor authentication.

Panels

Search

The *Search* panel is the default panel users will see when they first log into DocFinity. After the initial login, DocFinity will save the existing Workspace, Panels, and values upon exit – whether logoff or timeout. To clear any values, click on “reset to defaults.” If the values still do not clear or reset, select a different Workspace and select “Search” from the Workspace menu again.

The *Search* panel lets you search for documents in the Repository using a variety of search methods. Search results are displayed in the *Search Results* panel. When opened, the *Search* panel displays the last search and last prompt values used.



The screenshot shows the 'Search' panel interface. At the top, there is a title bar with the word 'Search' and standard window controls. Below the title bar is a search bar with a magnifying glass icon and a question mark icon. The main area contains several form fields and buttons. A note at the top states 'Fields marked with an * are required.' The form includes: 'Search :' with a dropdown menu showing 'CASHR: Personnel Records'; 'Record Category:' with a dropdown menu showing 'Select...'; 'Record Type:' with the text 'None available'; 'Employee Search:' with an empty text input field; 'Select Employee:' with the text 'None available'; 'Applicant Name contains:' with an empty text input field; 'Unit:' with an empty text input field; 'Rank:' with an empty text input field; and 'Employee ID Set?:' with a dropdown menu showing 'Select...'. At the bottom left, there are two buttons: a blue 'Search' button and a white 'Reset to Defaults' button.

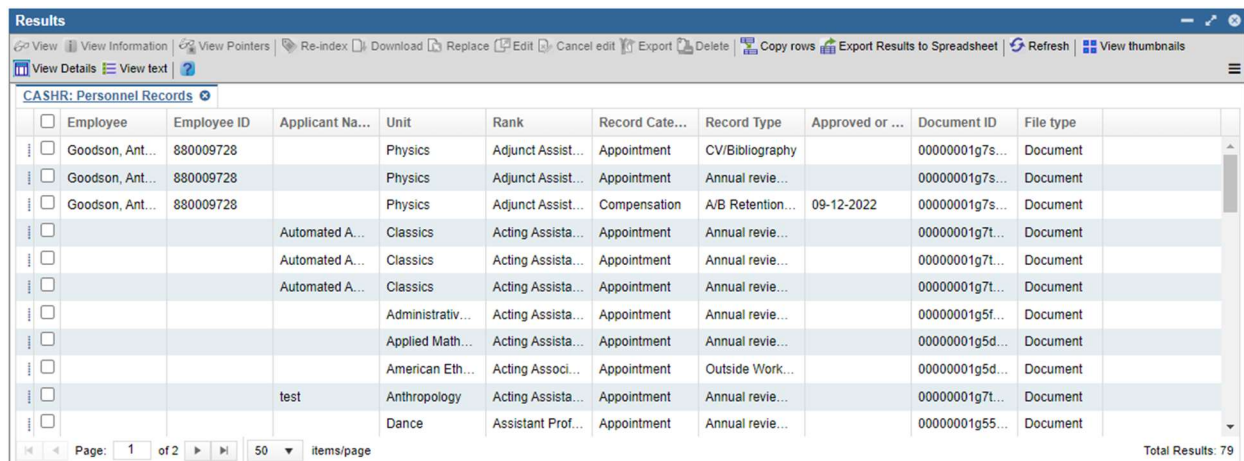
Search Panel - Search on selected metadata fields. These searches are set up and assigned by administrators, in consultation with the customer. Selecting a configured search displays the appropriate metadata value options, as outlined by the unit, below the drop-down list of searches.

Search button - Search for documents. Documents with metadata matching the search criteria are displayed in the Search Results panel. Fields marked with an asterisk are required.

Reset to Defaults button - Empty search fields of user-entered data and reverts prompts to their configured default values.

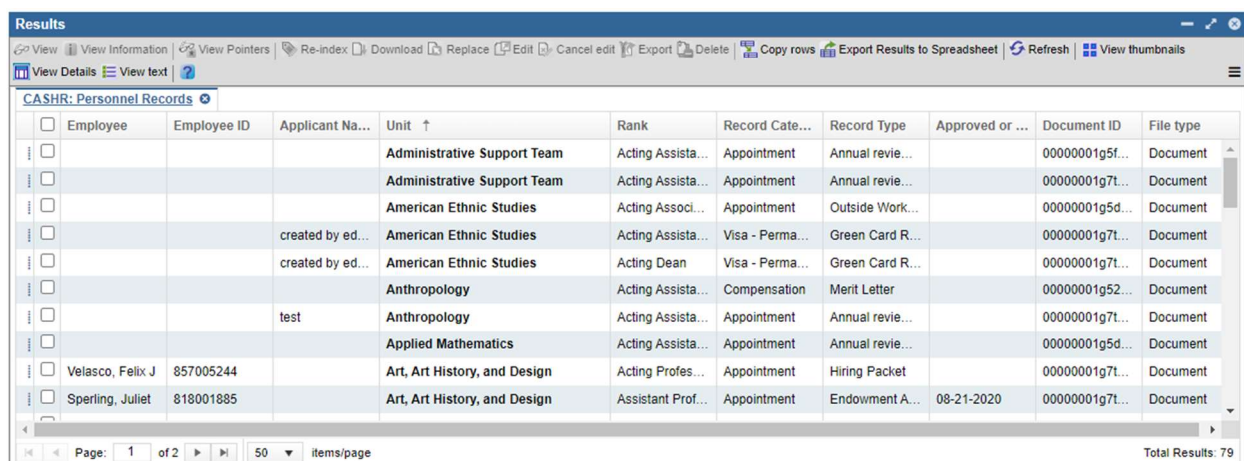
Search Results

The *Results* panel displays the results of your search criteria.



Employee	Employee ID	Applicant Na...	Unit	Rank	Record Cate...	Record Type	Approved or ...	Document ID	File type
Goodson, Ant...	880009728		Physics	Adjunct Assist...	Appointment	CV/Bibliography		00000001g7s...	Document
Goodson, Ant...	880009728		Physics	Adjunct Assist...	Appointment	Annual revie...		00000001g7s...	Document
Goodson, Ant...	880009728		Physics	Adjunct Assist...	Compensation	A/B Retention...	09-12-2022	00000001g7s...	Document
		Automated A...	Classics	Acting Assista...	Appointment	Annual revie...		00000001g7t...	Document
		Automated A...	Classics	Acting Assista...	Appointment	Annual revie...		00000001g7t...	Document
		Automated A...	Classics	Acting Assista...	Appointment	Annual revie...		00000001g7t...	Document
			Administrativ...	Acting Assista...	Appointment	Annual revie...		00000001g5f...	Document
			Applied Math...	Acting Assista...	Appointment	Annual revie...		00000001g5d...	Document
			American Eth...	Acting Associ...	Appointment	Outside Work...		00000001g5d...	Document
		test	Anthropology	Acting Assista...	Appointment	Annual revie...		00000001g7t...	Document
			Dance	Assistant Prof...	Appointment	Annual revie...		00000001g55...	Document

The results grid has additional functionality such as sorting by the column value, expanding the width of the column, selecting a larger set of results per page, or jumping to a new page. In the example shown below, I have sorted on "Unit" as indicated by the up arrow and have expanded that column (note it is wider than the other columns.)



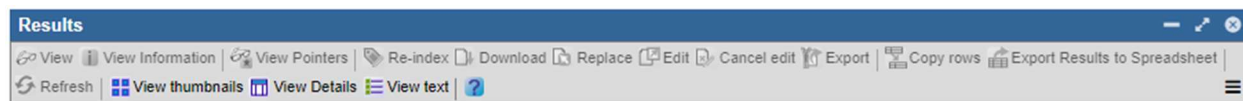
Employee	Employee ID	Applicant Na...	Unit ↑	Rank	Record Cate...	Record Type	Approved or ...	Document ID	File type
			Administrative Support Team	Acting Assista...	Appointment	Annual revie...		00000001g5f...	Document
			Administrative Support Team	Acting Assista...	Appointment	Annual revie...		00000001g7t...	Document
			American Ethnic Studies	Acting Associ...	Appointment	Outside Work...		00000001g5d...	Document
		created by ed...	American Ethnic Studies	Acting Assista...	Visa - Perma...	Green Card R...		00000001g7t...	Document
		created by ed...	American Ethnic Studies	Acting Dean	Visa - Perma...	Green Card R...		00000001g7t...	Document
			Anthropology	Acting Assista...	Compensation	Merit Letter		00000001g52...	Document
		test	Anthropology	Acting Assista...	Appointment	Annual revie...		00000001g7t...	Document
			Applied Mathematics	Acting Assista...	Appointment	Annual revie...		00000001g5d...	Document
Velasco, Felix J	857005244		Art, Art History, and Design	Acting Profes...	Appointment	Hiring Packet		00000001g7t...	Document
Sperling, Juliet	818001885		Art, Art History, and Design	Assistant Prof...	Appointment	Endowment A...	08-21-2020	00000001g7t...	Document



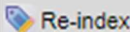

The viewing options icons are listed below.


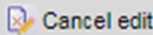
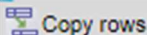
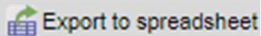
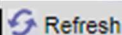

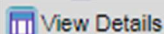

Note that some of these icons are grayed out. In some cases, they become actionable (enabled) on a "just in time" basis. For example, when you first log in, almost all fields but "?" (for help) are gray. Once you perform a search, you will see relevant actions enabled, once you select a document you will see even more actions enabled in the results pane, and once you open the document you will see actions enabled in the document viewer pane.

In other cases, some functionality may not be actionable if it is not currently enabled in the system. We will revisit default functionality and enabling enhancements after most, if not all, customers have migrated to DocFinity.

Search Results Details

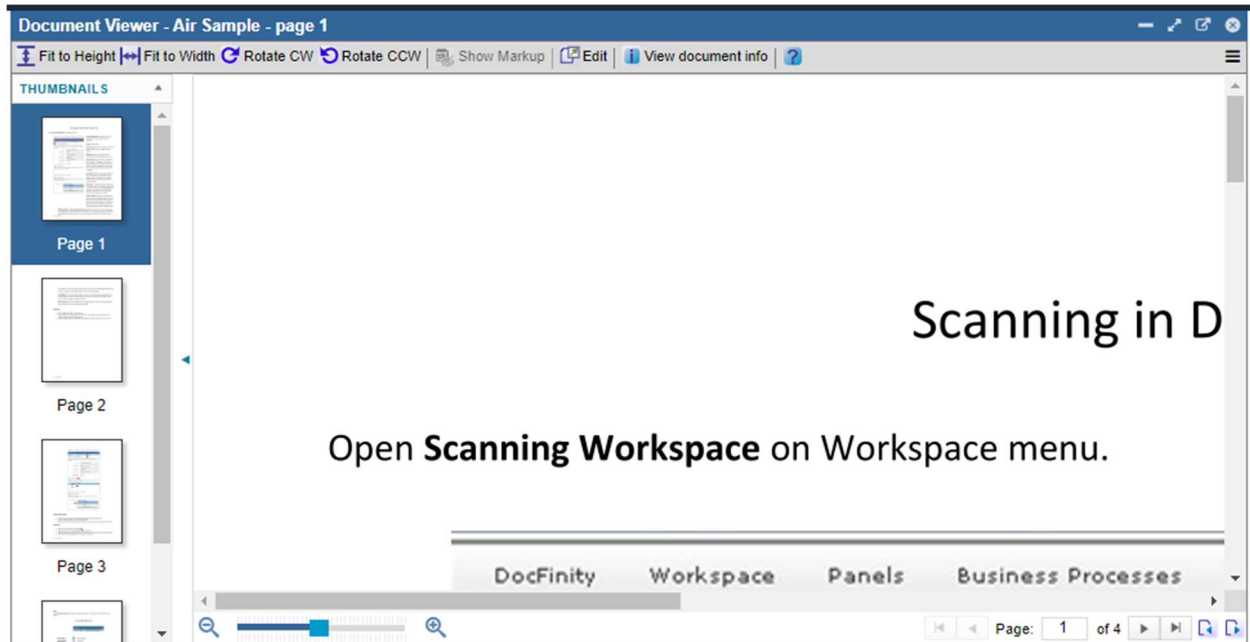


 View	<p>View the document. Requires View document security access to the document.</p> <p>Depending on your Document View preference (covered in the first section), the document will either open in the Viewer (requires the View in DocFinity Viewer feature right), a PDF Reader (requires the View as PDF feature right, and view_markup document security access if the document has markups), or its native application (requires the View as Native feature right, and override_redaction document security access if the document to be opened has redactions).</p> <p>If the document is a saved Checklist Search, opens the saved checklist in a Search Results tab. If the document is a form, opens the Form panel.</p> <p>Not available when multiple documents are selected.</p> <p>Note: Encrypted/Certified PDFs cannot be opened in the Viewer and must be viewed using their native applications.</p> <p>Note: Clicking this without the required View in DocFinity Viewer feature right will display an error message instead of the document.</p>
 View Information	<p>View the selected document's metadata. Opens the Document Information panel. Requires the View Document Information Feature Right and View document security access to the document.</p> <p>Not available when multiple documents are selected.</p>
 Re-index	<p>Edit the metadata associated with the selected document. Opens the Index panel. Requires the Index and re-index Feature Rights and Update document security access to the document. Not available when multiple documents are selected.</p> <p>Note: Documents that are currently being used by a process instance cannot be re-indexed.</p>
 Replace	<p>Replace a document in the Repository, and if it has been checked out, checks the document back in, allowing others to check it out for editing. This is currently not enabled for University of Washington EDM customers.</p>

 Edit	Checks the selected document(s) out for editing in the Document Viewer. This is currently not enabled for University of Washington EDM customers.
 Cancel edit	Cancel the edit on the selected document and mark it as checked-in. This is currently not enabled for University of Washington EDM customers.
 Copy rows	Copy the search results to the clipboard. Results are formatted in tab-delimited format. Requires the Copy Results to Clipboard Feature Right.
 Export to spreadsheet	Export the results of a search to a CSV formatted file. The file is made available through DocFinity > My Desktop > Export Queue. The manner in which the results of the search have been sorted in DocFinity will be the same as how they will appear in the CSV file, except for Stored Procedure and Checklist Searches, which export in their default sort. The exported CSV file will contain all results found by the search. Requires the Export to Spreadsheet Feature Right. Note that "Export to Spreadsheet" will only work with Search Results in "View Details" format.
 Refresh	Search again using the same search settings.
 View thumbnails	Display search results as thumbnail images. Documents are displayed in thumbnail form. If the document cannot be displayed in thumbnail form, one of the following icons is displayed: No thumbnail is available.
 View Details	Display search results in columns. The columns displayed depend on what Metadata Objects the search is configured to display, but always include File Type (which indicates if the file is a document, saved checklist, or a form). For Pointer Searches (generated by selecting a document with pointers and clicking View Pointers), the columns displayed will also always include the Category and Document
	View the help page for Search Result Panel

Document Viewer Panel










The *Document Viewer* panel displays an actual view of the selected document. The documents can be viewed in pdf format or in native format. *Note: Larger files (over 30MB in size) must be downloaded and opened in their native format.*



Document Viewer Details

Buttons / Panel Menu Options / Right-Click Context Options

Batch options. Some options are only available when a batch is checked out. Options vary depending on context and a user's Feature Rights.

Save		Save markup changes
Cancel		Cancel any changes
Fit to Height		Adjust the image to fill the entire height of the viewer
Fit to Width		Adjust the image to fill the entire width of the viewer
Rotate CW		Rotate the image 90 degrees clockwise. If you have the Manage Page Rotation feature right, changing the document's orientation changes it for all users.
Rotate CCW		Rotate the image 90 degrees counterclockwise. If you have the Manage Page Rotation feature right, changing the document's orientation changes it for all users.
Open as PDF		Open the displayed document as a PDF. Any footnotes associated with the document will be included in the PDF. The workstation must have the ability to open and display PDFs. Requires <i>View</i> document security access to the document to be opened, and the <i>View as PDF</i> feature right.
Open in Native Application		Open the displayed document in the document's native program. The workstation must have the native program installed. Requires <i>View</i> document security access to the document to be opened, as well as the <i>View as Native</i> feature right. The native application must be available on the local workstation.
Open a Duplicate		Open the latest saved version of the document in a new window without closing the original Viewer panel. Any changes made to the document since it was last saved will not be reflected on the duplicate.
Help		Display the panel's online help.
Show Toolbar		Toggle the display of the button bar. Default is Show (Checked).
Show Button Text		Show the button labels.
Hide Button Text		Hide the button labels.

Thumbnails

Displays the individual pages in a multi-page as thumbnails. Click a thumbnail to select that page and display it in the canvas.

Zoomer Bar

Magnify or shrink the image. Drag and drop the box to decrease/increase magnification.

You can also zoom by holding SHIFT+a using the mouse scroll wheel, and zoom to a selection by holding down CTRL while clicking-and-dragging a selection box.



Shrink the image.



Magnify the image.

Previous Document



Displays the previous document.

Next Document



Displays the next document.

Navigation Controls – Lets you navigate through a multi-page document.



First Page



Go to the first page of the document.

Previous Page



Go back one page.

Current Page

The current page. Type in page number and hit enter to display that page.

Next Page



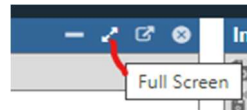
Go forward one page.

Last Page

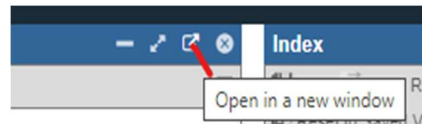


Go to last page of the document.

Full Screen



Open in a new window



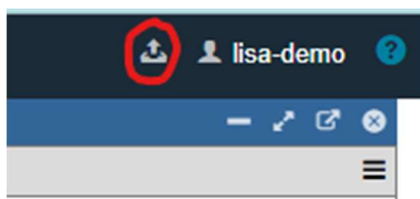
Step-by-Step Guide

This chapter provides tutorial walk-through screenshots to accomplish basic DocFinity functions.

Quick Upload and Indexing Steps

“Quick Uploads” can be done via an icon in the upper right corner of the screen, next to the user credentials. A “Quick Upload” accomplishes uploading a document and immediately indexing it at the same time to ensure that all the needed work to make a file “searchable” is done quickly and easily.

Once a document is uploaded and indexed, the user “commits” the metadata associations to complete the process for that file. The associated metadata values remain displayed in the fields. The user can upload a new document with similar metadata and make those edits without having to re-enter all the data.



1. **Open “Quick Upload” Window:** By clicking on this icon, an “Upload File” screen will appear, along with an “Index” screen.

Upload and Index Files x

Add files by browsing or dragging and dropping them. Then, add indexing information to the files. Committing the files will make them searchable in DocFinity.

<p>Upload Files</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input type="button" value="Choose Files"/> * drop files here to upload </div>	<p>Index Files</p>
	<div style="margin-bottom: 5px;">* Category: College of Arts & Sciences: Human Resources</div> <div style="margin-bottom: 5px;">* Document Type: Personnel Records</div> <div style="margin-bottom: 5px;">* Employment Group: Select..</div> <div style="margin-bottom: 5px;">* Record Category: ! Select..</div> <div style="margin-bottom: 5px;">* Record Type: <input type="text"/></div> <div style="margin-bottom: 5px;">Employee Search: <input type="text"/></div> <div style="margin-bottom: 5px;">Select Employee: <input type="text"/></div> <div style="margin-bottom: 5px;">Employee RegID: <input type="text"/></div> <div style="margin-bottom: 5px;">Employee: <input type="text"/></div> <div style="margin-bottom: 5px;">* Rank: Select..</div> <div style="margin-bottom: 5px;">* Unit: Select..</div> <div style="margin-bottom: 5px;">Approved or Signed Date: MM-DD-YYYY <input type="text"/></div> <div style="margin-bottom: 5px;">Record Retention Trigger Date: MM-DD-YYYY <input type="text"/></div> <div style="margin-bottom: 5px;">Applicant Name: <input type="text"/></div> <div style="margin-bottom: 5px;">* Ingest Date: 07-18-2022</div> <div style="margin-bottom: 5px;">* Document Classification: <input type="text"/></div>

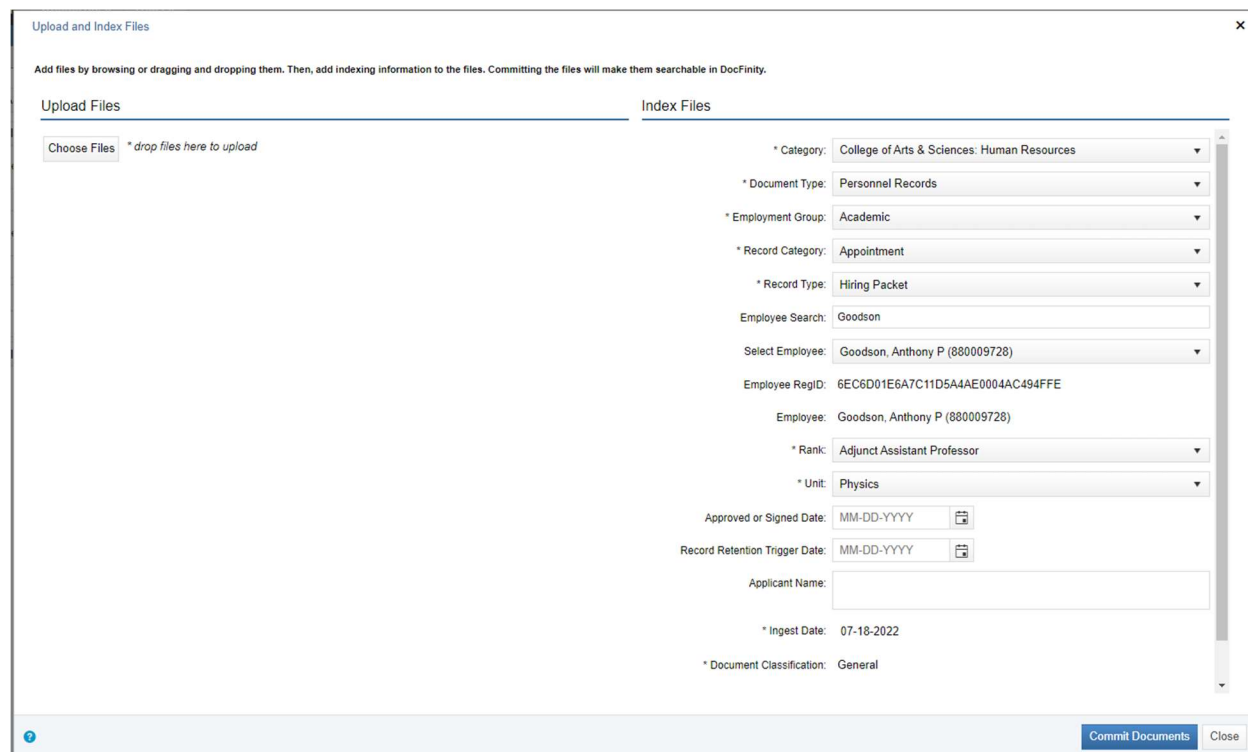
This screen allows the user to select file(s) from directories accessible to their computer.

Note that while the user can upload as many files as they would like and are then able to index the files as a group, the UW EDM team recommends they upload and index one file at a time. See the Appendix for more information on bulk uploads and batch indexing.

2. **Select file to upload:** Select the Browse button, browse to the file you want to upload, select the Upload button, and select the Close button.

Note that the Category and Document Type fields are auto-populated for the Academic Personnel values.

3. **Add metadata:** Fill in all the associated metadata for each field. Fields marked with an asterisk are required to save the files. The example document is set as a Hiring Packet. As a result the Record Retention Trigger Date is not populated. For this example document, this is a full set of data.



Upload and Index Files

Add files by browsing or dragging and dropping them. Then, add indexing information to the files. Committing the files will make them searchable in DocFinity.

Upload Files | Index Files

Choose Files * drop files here to upload

* Category: College of Arts & Sciences: Human Resources

* Document Type: Personnel Records

* Employment Group: Academic

* Record Category: Appointment

* Record Type: Hiring Packet

Employee Search: Goodson

Select Employee: Goodson, Anthony P (880009728)

Employee RegID: 6EC6D01E6A7C11D5A4AE0004AC494FFE

Employee: Goodson, Anthony P (880009728)

* Rank: Adjunct Assistant Professor

* Unit: Physics

Approved or Signed Date: MM-DD-YYYY

Record Retention Trigger Date: MM-DD-YYYY

Applicant Name:

* Ingest Date: 07-18-2022

* Document Classification: General

Commit Documents Close

4. **Commit Document:** Once the full set of metadata has been added, select to “Commit Document.” This will complete the Index process and the document will now be searchable.

Applicant Name:

* Ingest Date: 07-18-2022

* Document Classification: General

Commit Documents Close

5. **Successful Commit:** Upon successful completion, a confirmation message will be displayed.

Upload and Index Files

Add files by browsing or dragging and dropping them. Then, add indexing information to the files. Committing the files will make them searchable in DocFinity.

1 document was committed successfully.

Upload Files Index Files

Choose Files * drop files here to upload

* Category: College of Arts & Sciences: Human Resources

* Document Type: Personnel Records

* Employment Group: Academic

* Record Category: Appointment

* Record Type: Hiring Packet

Employee Search: Goodson

Select Employee: Goodson, Anthony P (880009728)

Employee RegID: 6EC6D01E6A7C11D5A4AE0004AC494FFE

Employee: Goodson, Anthony P (880009728)

* Rank: Adjunct Assistant Professor

* Unit: Physics

Approved or Signed Date: MM-DD-YYYY

Record Retention Trigger Date: MM-DD-YYYY

Applicant Name:

* Ingest Date: 07-18-2022

* Document Classification: General

Commit Documents Close

6. If a required field is missing, an error icon will appear. In this case, the Unit was not filled in:

Upload and Index Files ✕

Add files by browsing or dragging and dropping them. Then, add indexing information to the files. Committing the files will make them searchable in DocFinity.

Upload Files	Index Files
<p>Choose Files <small>* drop files here to upload</small></p> <div style="border: 1px solid #ccc; padding: 5px;"> <p>debug.log 1.1 KB </p> </div>	<p>* Category: College of Arts & Sciences: Human Resources</p> <p>* Document Type: Personnel Records</p> <p>* Employment Group: Academic</p> <p>* Record Category: Appointment</p> <p>* Record Type: Hiring Packet</p> <p>Employee Search: good</p> <p>Select Employee: Gooding, Lara M (817005543)</p> <p>Employee RegID: 065F5F77EE9E90510C3134EE1E2F95B1</p> <p>Employee: Gooding, Lara M (817005543)</p> <p>* Rank: Acting Instructor</p> <p>* Unit: Select...</p> <p>Approved or Signed Date: Unit is required </p> <p>Record Retention Trigger Date: MM-DD-YYYY </p> <p>Applicant Name: <input style="width: 100%;" type="text"/></p> <p>* Ingest Date: 07-18-2022</p> <p>* Document Classification: General</p>

Commit Documents
Close

7. **Upload a new document (if desired):** If desired the user may upload another document. For convenience, the metadata associated with the last document is still in the fields. For efficiency, it is recommended that the user upload a similar document so minimal metadata changes need to be made.

In this next example shows uploading the CV for the same new Employee as above.

Upload and Index Files ✕

Add files by browsing or dragging and dropping them. Then, add indexing information to the files. Committing the files will make them searchable in DocFinity.

1 document was committed successfully. ✕

Upload Files

Choose Files * drop files here to upload

Index Files

* Category: College of Arts & Sciences: Human Resources

* Document Type: Personnel Records

* Employment Group: Academic

* Record Category: Appointment

* Record Type: CV/Bibliography

Employee Search: good

Select Employee: Gooding, Lara M (817005543)

Employee RegID: 065F5F77EE9E90510C3134EE1E2F95B1

Employee: Gooding, Lara M (817005543)

* Rank: Acting Instructor

* Unit: Art, Art History, and Design

Approved or Signed Date: MM-DD-YYYY

Record Retention Trigger Date: MM-DD-YYYY

Applicant Name:

* Ingest Date: 07-18-2022

* Document Classification: General

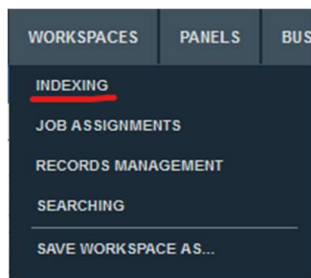
Commit Documents
Close

Batch Upload and Indexing Steps

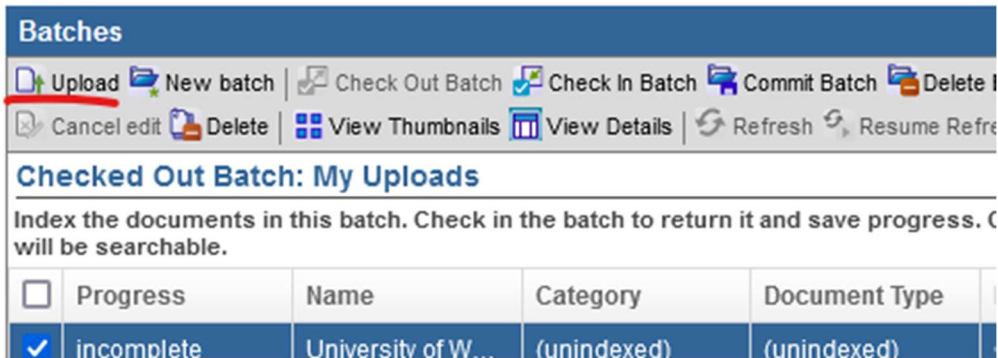
This section provides details on how to index documents in DocFinity if they have been uploaded using Batches. *Note: A batch may be a single document.*

Indexing documents applies searchable metadata values to the documents for easy discovery.

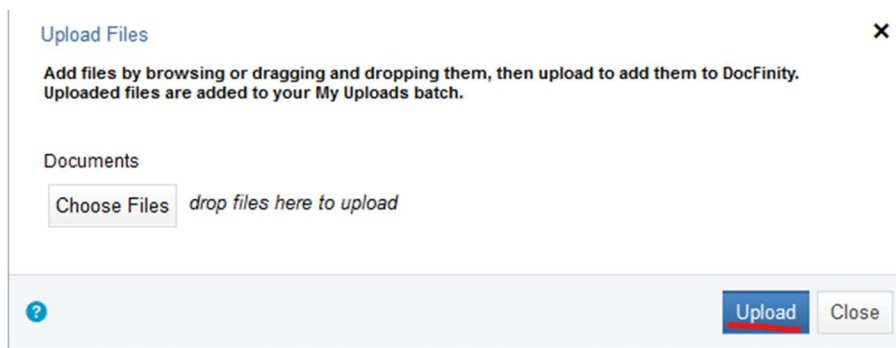
1. Select Indexing from the Workspaces menu.



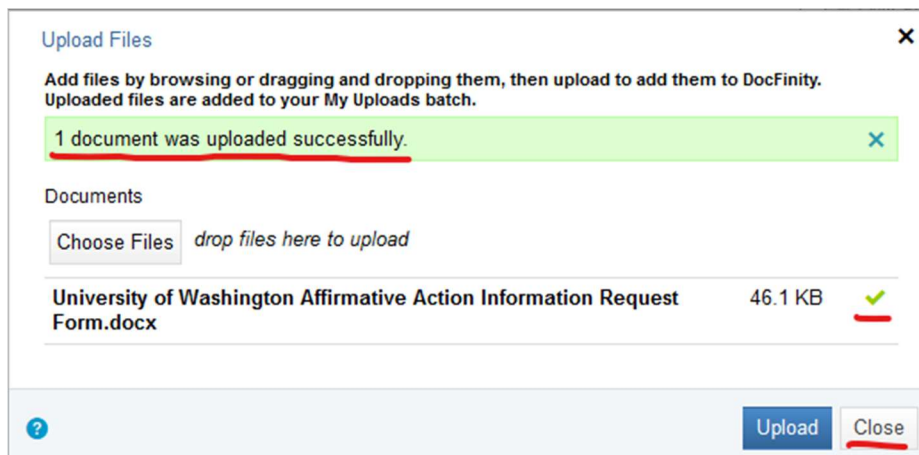
- To upload a file or multiple files, select the Upload icon in the Batches panel.



- Choose your file(s) or drag and drop the file(s) that you want to upload. Select the Upload button.

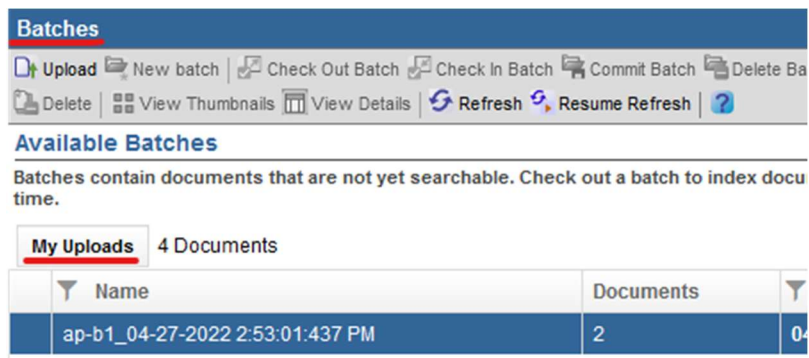


A message will appear to signal a successful upload, as well as a green check mark next to the file(s). Select Close.



Your file(s) will now appear in your My Uploads section of the Batch panel.

4. To locate the file(s) to index, select My Uploads from the Batch panel to access documents that were previously uploaded.



Batches

Upload | New batch | Check Out Batch | Check In Batch | Commit Batch | Delete Batch

Delete | View Thumbnails | View Details | Refresh | Resume Refresh

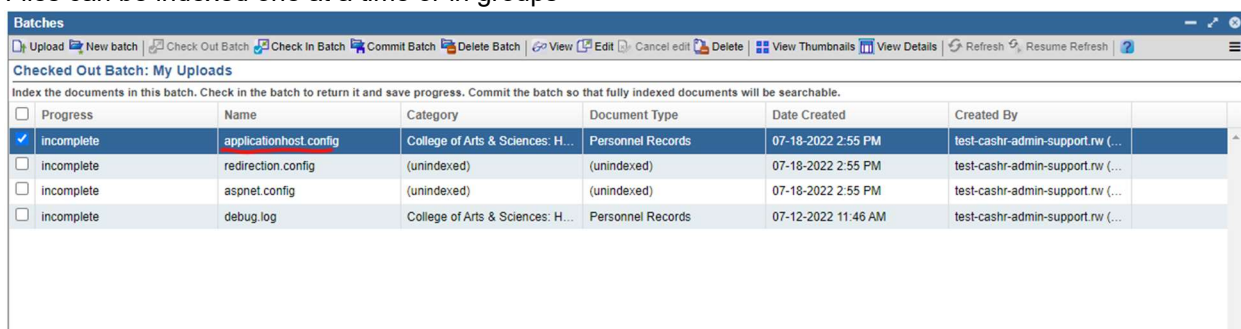
Available Batches

Batches contain documents that are not yet searchable. Check out a batch to index documents.

My Uploads 4 Documents

Name	Documents
ap-b1_04-27-2022 2:53:01:437 PM	2

5. Select the file(s) you want to index and double click to open.
 - a. The most recently uploaded files will default to the top of the list, but the grid is sortable.
6. Files can be indexed one at a time or in groups



Batches

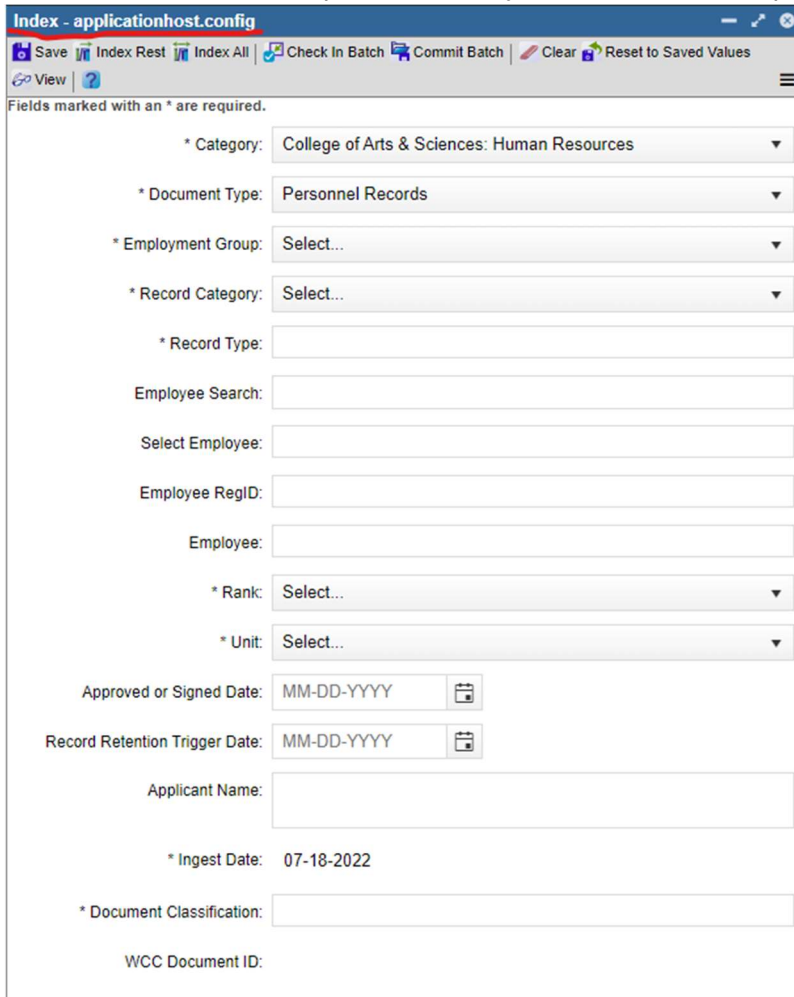
Upload | New batch | Check Out Batch | Check In Batch | Commit Batch | Delete Batch | View | Edit | Cancel edit | Delete | View Thumbnails | View Details | Refresh | Resume Refresh

Checked Out Batch: My Uploads

Index the documents in this batch. Check in the batch to return it and save progress. Commit the batch so that fully indexed documents will be searchable.

Progress	Name	Category	Document Type	Date Created	Created By
<input checked="" type="checkbox"/>	incomplete applicationhost.config	College of Arts & Sciences: H...	Personnel Records	07-18-2022 2:55 PM	test-cashr-admin-support.rw (...)
<input type="checkbox"/>	incomplete redirection.config	(unindexed)	(unindexed)	07-18-2022 2:55 PM	test-cashr-admin-support.rw (...)
<input type="checkbox"/>	incomplete aspnet.config	(unindexed)	(unindexed)	07-18-2022 2:55 PM	test-cashr-admin-support.rw (...)
<input type="checkbox"/>	incomplete debug.log	College of Arts & Sciences: H...	Personnel Records	07-12-2022 11:46 AM	test-cashr-admin-support.rw (...)

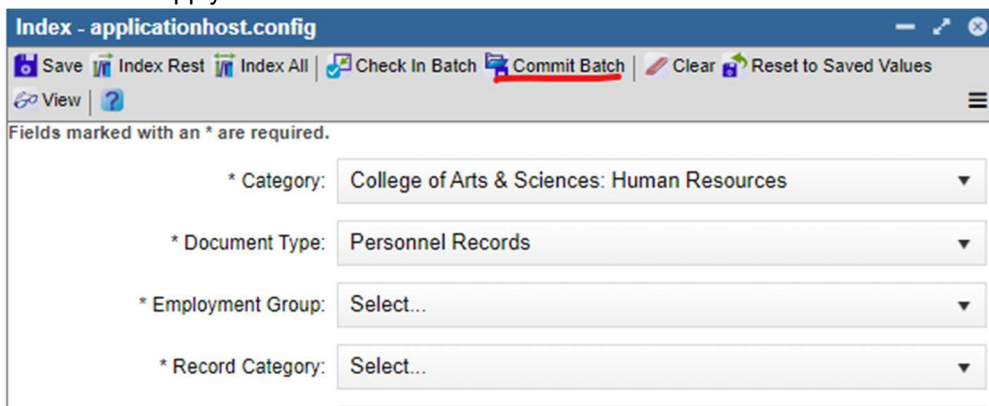
7. Add metadata in the Index panel. *Note: Any field with an * is a required field.*



The screenshot shows the 'Index - applicationhost.config' form. The top navigation bar includes buttons for 'Save', 'Index Rest', 'Index All', 'Check In Batch', 'Commit Batch', 'Clear', and 'Reset to Saved Values'. Below the navigation bar, a message states 'Fields marked with an * are required.' The form contains the following fields:

- * Category: College of Arts & Sciences: Human Resources
- * Document Type: Personnel Records
- * Employment Group: Select...
- * Record Category: Select...
- * Record Type: (empty)
- Employee Search: (empty)
- Select Employee: (empty)
- Employee RegID: (empty)
- Employee: (empty)
- * Rank: Select...
- * Unit: Select...
- Approved or Signed Date: MM-DD-YYYY (with calendar icon)
- Record Retention Trigger Date: MM-DD-YYYY (with calendar icon)
- Applicant Name: (empty)
- * Ingest Date: 07-18-2022
- * Document Classification: (empty)
- WCC Document ID: (empty)

8. Select Commit Batch. This will make any documents with complete metadata discoverable via Search.
 - a. Index Rest will apply the selected metadata to the current file and any files below it in the Batches panel.
9. Index All will apply the selected metadata to the current file and all others in the Batches panel



This screenshot is similar to the previous one, but the 'Commit Batch' button in the top navigation bar is highlighted with a red box. The form fields are the same as in the previous screenshot.

Search Steps

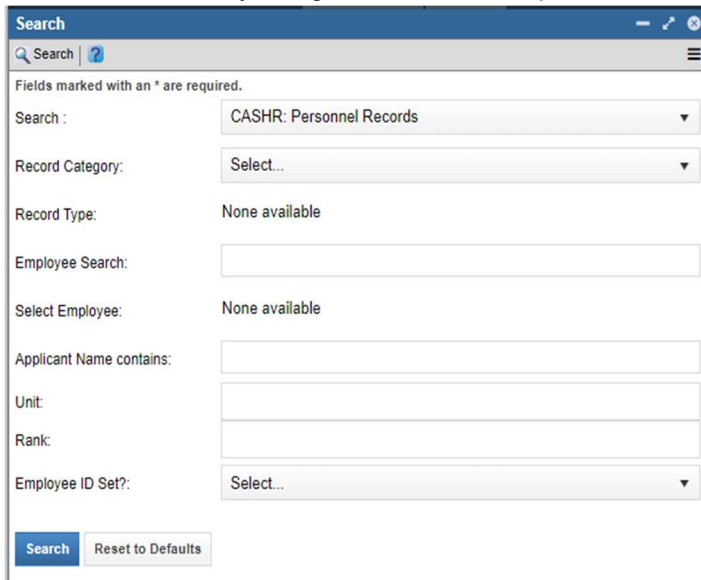
Now that the documents have been uploaded and indexed in DocFinity, we'll search for and view those documents. The default screen is the Searching workspace, but if the user has closed that workspace, it can be opened again.

1. **Open the "Searching Workspace":** Click **Workspace > Searching** to open the Search panel.



2. **Add Search Criteria:** Add the metadata values which correspond to the document(s) you are searching for. Provide as much specific information you have available to you to refine your search. The more search queries you use, the more refined your results set will be.

The files can be accessed by doing a search for the specific metadata values entered in the upload:


 A screenshot of the DocFinity Search interface. The window title is 'Search'. At the top, there is a search bar with a magnifying glass icon and a question mark icon. Below the search bar, there is a note: 'Fields marked with an * are required.' The search criteria are as follows:

- Search : CASHR: Personnel Records (dropdown menu)
- Record Category: Select... (dropdown menu)
- Record Type: None available
- Employee Search: (text input field)
- Select Employee: None available
- Applicant Name contains: (text input field)
- Unit: (text input field)
- Rank: (text input field)
- Employee ID Set?: Select... (dropdown menu)

 At the bottom left, there are two buttons: 'Search' and 'Reset to Defaults'.

Searching Tips:

1. For dropdown prompts, typing a part of the value you are looking for will reduce the list to those selections containing that text.

2. We have reconfigured Search to allow for searching on multiple values. Note that this operates as an “or” for finding the results.
3. Dates can either be typed out with the format MM-DD-YYYY or selected from the date picker.
4. You can use the wildcard, %, in text field prompts:
 - a. 400470% will give you all student IDs that begin with 400470.
 - b. %400470 will give you all student IDs that end with 400470.
 - c. %400470% will give you all student IDs that have 400470 anywhere in the student id.
5. “Reset to Defaults” blanks out any previous selections.
6. Search functionality within and across metadata objects works as follows:
 - a. “and” between the search fields (so must ‘include’)
 - b. “or” between the multi-select values (so ‘either,’ or ‘both’)
7. If a user does not have access to a document (Record Type, etc.) the results will simply say “No records found.” There is not any messaging stating they do not have access.

Re-Index (Update) Document

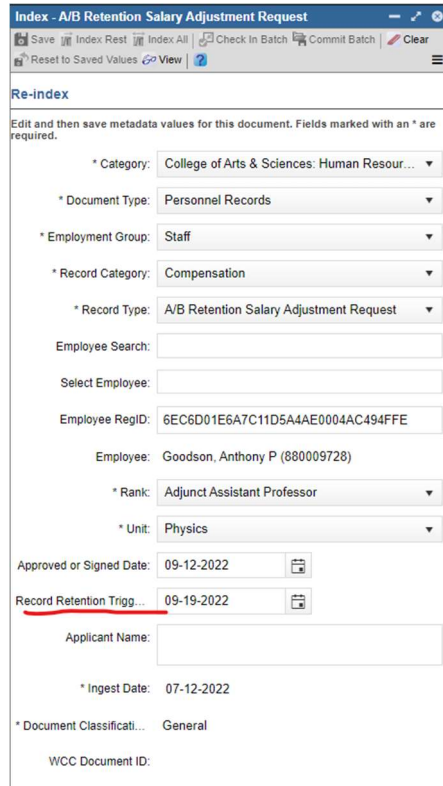
This section provides details on how to re-index a document, which applies different metadata on a document(s) that already exists in the system. Again, groups of documents may have common/same metadata selections applied to the whole group at one time.



Employee	Employee ID	Applicant Na...	Unit	Rank	Record Cate...	Record Type	Approved or ...	Document ID	File type
<input type="checkbox"/>	Goodson, Ant...	880009728		Physics	Adjunct Assist...	Appointment	Hiring Packet	00000001g89...	Document
<input type="checkbox"/>	Gooding, Lar...	817005543		Art, Art Histor...	Acting Instructor	Appointment	CV/Bibliography	00000001g89...	Document
<input type="checkbox"/>	Goodson, Ant...	880009728		Physics	Adjunct Assist...	Appointment	CV/Bibliography	00000001g7s...	Document
<input type="checkbox"/>	Goodson, Ant...	880009728		Physics	Adjunct Assist...	Appointment	Annual revie...	00000001g7s...	Document
<input checked="" type="checkbox"/>	Goodson, Ant...	880009728		Physics	Adjunct Assist...	Compensation	A/B Retention...	09-12-2022	00000001g7s...
<input type="checkbox"/>			Automated A...	Classics	Acting Assista...	Appointment	Annual revie...	00000001g7t...	Document
<input type="checkbox"/>			Automated A...	Classics	Acting Assista...	Appointment	Annual revie...	00000001g7t...	Document
<input type="checkbox"/>			Automated A...	Classics	Acting Assista...	Appointment	Annual revie...	00000001g7t...	Document
<input type="checkbox"/>			Administrativ...	Acting Assista...	Appointment	Annual revie...	Annual revie...	00000001g5f...	Document
<input type="checkbox"/>			Applied Math...	Acting Assista...	Appointment	Annual revie...	Annual revie...	00000001g5d...	Document
<input type="checkbox"/>			American Eth...	Acting Associ...	Appointment	Outside Work...	Outside Work...	00000001g5d...	Document

1. **Find Document to be re-indexed:** Perform a search as outlined above, and find the document you are looking for in the Search Results.
2. **Select the file and select to “Re-index” it:** To re-index a document, you would select the document by double clicking the line of the search result for which you would like to update the metadata value(s) and then select the re-index icon indicated by the red underline above. You can also right-click on the selected line and choose Re-index from the menu.

- a. **Edit the metadata as needed:** Any of the metadata, other than “Document Type” and “Category” may be edited. In this example, Rank and Unit were added.



Index - A/B Retention Salary Adjustment Request

Save Index Rest Index All Check In Batch Commit Batch Clear

Reset to Saved Values View

Re-index

Edit and then save metadata values for this document. Fields marked with an * are required.

* Category: College of Arts & Sciences: Human Resour...

* Document Type: Personnel Records

* Employment Group: Staff

* Record Category: Compensation

* Record Type: A/B Retention Salary Adjustment Request

Employee Search:

Select Employee:

Employee RegID: 6EC6D01E6A7C11D5A4AE0004AC494FFE

Employee: Goodson, Anthony P (880009728)

* Rank: Adjunct Assistant Professor

* Unit: Physics

Approved or Signed Date: 09-12-2022

Record Retention Trigg... 09-19-2022

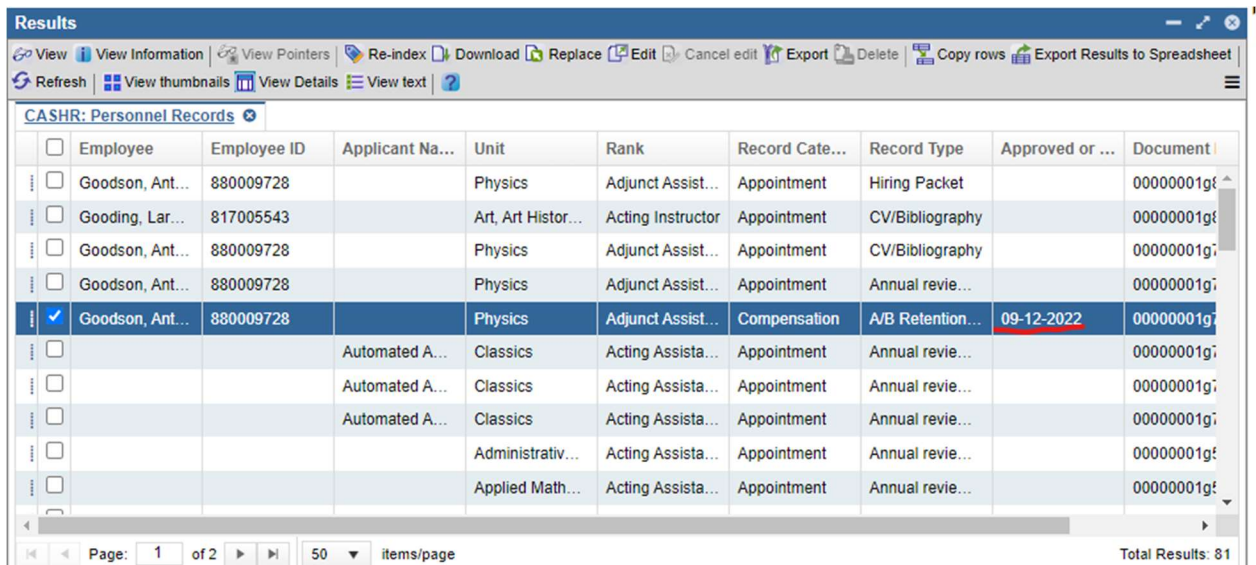
Applicant Name:

* Ingest Date: 07-12-2022

* Document Classificati... General

WCC Document ID:

3. **Save the metadata changes:** After making your metadata value change(s), the save icon will be enabled (indicated by the red underline above). By selecting the save icon, your metadata value change(s) will be saved.
4. **View metadata changes:** Note that the changes will show up immediately in the Search Results window.



Results

View View Information View Pointers Re-index Download Replace Edit Cancel edit Export Delete Copy rows Export Results to Spreadsheet

Refresh View thumbnails View Details View text

CASHR: Personnel Records

<input type="checkbox"/>	Employee	Employee ID	Applicant Na...	Unit	Rank	Record Cate...	Record Type	Approved or ...	Document I
<input type="checkbox"/>	Goodson, Ant...	880009728		Physics	Adjunct Assist...	Appointment	Hiring Packet		00000001g
<input type="checkbox"/>	Gooding, Lar...	817005543		Art, Art Histor...	Acting Instructor	Appointment	CV/Bibliography		00000001g
<input type="checkbox"/>	Goodson, Ant...	880009728		Physics	Adjunct Assist...	Appointment	CV/Bibliography		00000001g
<input type="checkbox"/>	Goodson, Ant...	880009728		Physics	Adjunct Assist...	Appointment	Annual revie...		00000001g
<input checked="" type="checkbox"/>	Goodson, Ant...	880009728		Physics	Adjunct Assist...	Compensation	A/B Retention...	09-12-2022	00000001g
<input type="checkbox"/>			Automated A...	Classics	Acting Assista...	Appointment	Annual revie...		00000001g
<input type="checkbox"/>			Automated A...	Classics	Acting Assista...	Appointment	Annual revie...		00000001g
<input type="checkbox"/>			Automated A...	Classics	Acting Assista...	Appointment	Annual revie...		00000001g
<input type="checkbox"/>			Administrativ...	Classics	Acting Assista...	Appointment	Annual revie...		00000001g
<input type="checkbox"/>			Applied Math...	Classics	Acting Assista...	Appointment	Annual revie...		00000001g















Page: 1 of 2 50 items/page Total Results: 81

Appendix

DocFinity Interface Basics

Interfaces across DocFinity share common features and options, as described below. Note: You can change the display size of Workspaces by using your browser's Zoom controls.



	List Page Controls	Displayed when a list of items is too long to display on a single page. Click the navigation controls to display the other pages in the list.
	Help	Click to open online help for the pop-up window.
	Panel Menu	Click to open an options menu on panels.
	Close	Closes the panel or window.
	Minimize	Minimize the panel to a simple menu bar.
	Restore	Restore the panel to normal size.
	Full Screen	Maximize the panel to full screen.
	Open in New Window	Will move the Viewer to a new window.
	Checkbox	Selects / de-selects the adjacent item. When the checkbox is in the header of a list of item, clicking the checkbox selects / de-selects all the items in the list. Use shift-click to select multiple checkboxes.
	Filter	If a list column header items is preceded by this symbol, the list can be filtered by selected items in that column. Click to open the Filter options. Filtering displays any list entry that contains the entered characters.
	Filter Applied	Indicates the column is filtered. Click to open the Filter options.
	Resizable Panels	Click and drag to resize panels.
	Collapse/Expand Panel	Click to collapse or expand a panel.
	Adjustable Column Widths	Most table columns can be resized. Hold the cursor over the header column divider until the resizing



**Collapse/
Expand**

cursor appears, and then click and drag the divider to adjust it.

Collapse or expand the menu item to hide or show additional information / selections.

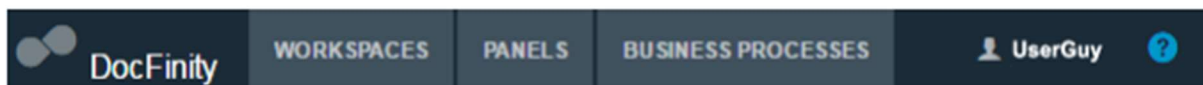
Last Name ▾

**Sortable
Columns**

Most tables can be sorted by column. Sort the items in a list by the selected column, either in descending or ascending order.


Navigation

The Navigation Bar gives you access to the menus for all of DocFinity's functions. Note: Only menu items you have the Feature Right to access are available for selection in the Navigation Bar.



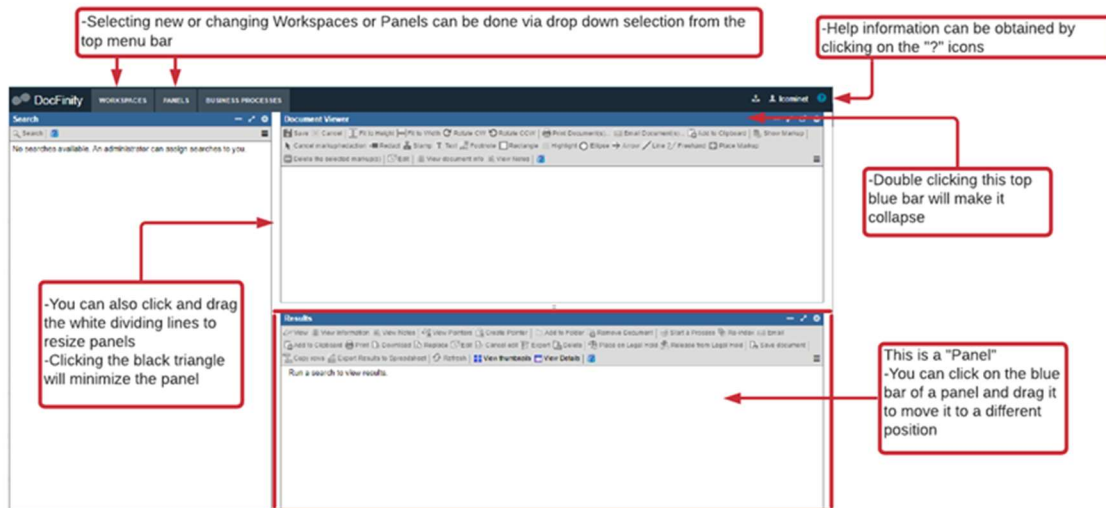
Workspace	Access preset workspaces, which are sets of panels related to a particular job function.
<ul style="list-style-type: none"> ● Indexing ● Searching ● Save Workspace As ● Delete Custom Workspace ● Reset to Default Workspaces 	<p>Load the Indexing workspace. By default, the workspace contains the Batches and Index panels.</p> <p>Load the Searching workspace. By default, the workspace contains the Search and Search Results panels.</p> <p>Save the current panel layout. Opens a window to select the workspace to save the layout as: Searching, Job Assignments, Indexing, or as a custom-named workspace. Opens Save Workspace As.</p> <p>Delete a custom workspace. Opens Delete Custom Workspace.</p> <p>Reset the workspace to its default display. You are prompted to confirm.</p>
Panels	Display or hide individual panels. A checkmark indicates the panel is open.
<ul style="list-style-type: none"> ● Batches ● Document Information ● Document Viewer ● Index ● Jobs ● Job Views ● My Desktop <ul style="list-style-type: none"> ● Search ● Search Results ● Close All Panels 	<p>Display or hide the Batches panel.</p> <p>Display or hide the Document Information panel.</p> <p>Display or hide the Document Viewer panel.</p> <p>Display or hide the Index panel.</p> <p>Display or hide the Jobs panel.</p> <p>Display or hide the Job Views panel.</p> <p>Display or hide the My Desktop panel, which includes the User and Server Message display, the Export Queue, and the Print/Fax Queue.</p> <p>Display or hide the Search panel.</p> <p>Display or hide the Search Results panel.</p> <p>Close all open panels.</p>
Help	Access DocFinity help and information.

- **Help** Open DocFinity Help documentation in a separate browser window.
- **Hot Key Reference** Display the Hot Key Reference.
- **About** Display the About window, which contains version and licensing information. Click the About window to close it.

- 
 - Click to access the user menu, where you can set your preferences or logout of DocFinity.
- **Preferences** Edit your application preferences. Options include General, Document View, Indexing, and Search Results.
 - **General** Set personal preferences for the level of instructional text displayed on panels and windows throughout DocFinity. Opens General Preferences.
 - **Document View** Set personal options for viewing documents throughout DocFinity. Opens Document View Preferences.
 - **Indexing** Set personal Indexing options. Opens Indexing Preferences.
 - **Search Results** Set personal Search Result options. Opens Search Results Preferences.
 - **Messages** Set personal preferences for user and system messaging. Opens Messages Preferences.
- **Logout** End the current session and log out the current user. Returns the browser to the DocFinity Login window. Logging out saves your current workspace. The next time you log in, the saved workspace will open automatically.

View of the Workspace and Panels

This is the Search Workspace



Helpful Terminology

Functional Area	DocFinity Term	Definition
User Interface	Workspace	The DocFinity interface consists of a three-column workspace and individual function-grouped panels. A workspace is a set of panels related to a particular job function. The workspaces available align with what has been configured for the user. All users will have the Search Workspace. Users are able to select to display or hide panels and save or delete a custom configuration.
	Panel	Panels are arranged in columns according to their function. Column width can be resized. The panels available align with what has been configured for the user. Users are able to select to display or hide panels and save or delete a custom configuration and access rights assigned.
	Canvas	Essentially the entire white space of the DocFinity screen without panels.
	Preferences	The Preferences panel lets you set your own application preferences for viewing documents, displaying indexing settings, searching, and general application help text.
Upload	Upload File Window	Action selectable via the icon or drop-down menu. Can browse to select a file to upload using a file browser, click to upload file. Close window when finished.
Search	File type	DocFinity stores documents in both native format and pdf format.
	Metadata (MDO)	Metadata object is associated to a document.
	Search methods	Search Panel opens with configured search capabilities. DocFinity can search in a variety of methods, depending on the configuration: category, template, checklist, wildcards using % on text fields
View	View Document	Action selectable via the icon or drop-down menu. Display the selected document in the Document Viewer panel.
Download	Download	Action selectable via the icon or drop-down menu. Downloads a copy of the document. Opens a system Save dialog.

Index	Index	Metadata associated with the selected document, or batch of documents. Used to search for a group/batch of documents. Action selectable via the icon or drop-down menu.
	Batch	A Group of documents with the same metadata associated for viewing or searching for a group of documents.

Basic Crosswalk (WebCenter - DocFinity) Table

Below are the new DocFinity terms mapped to their current term in Oracle.

DocFinity (NEW)	Oracle
Document Name	Record Type
Document Type	Record Category
Employee	Employee RegID
Employee Group	Employment Group
Employee ID Set?	
Rank	Rank
Unit	Unit
Applicant Name	Applicant Name
Document Date	Approved or Signed Date
Intake Date	Ingest Date
Document Name	Record Type
Document Type	Record Category

Revision History

Date	Revision	Section	Text	Modified By
11/20/21	1.0	<i>Created document</i>	Created document	Lisa Cominetti
3/7/22	1.1	<i>Adding and editing content</i>	Updates	Lisa Cominetti and Jennifer Ward
3/9/22	1.2	<i>Updating document</i>	Post Training updates to document	Lisa Cominetti
3/10/22	1.3	<i>More Updates</i>	More updates after input	Lisa Cominetti
3/28/22	1.4	<i>Updates after UAT</i>	Updates based on UAT feedback	Lisa Cominetti