Overview

Content Explorer is a Perceptive Experience application used to search and view content in Perceptive Content.

In addition to the General User use cases, Supervisors and Power Users can use Content Explorer to modify tasks and manage exceptions.

Reassign Tasks When Create Task = Yes

You do not have to be in CBMS to launch Content Explorer.

Open Chrome and copy and paste this URL into your browser:
https://coloradooit-integration.perceptivecloud.com/contentexplorer1/#explorer

Once you copy the URL into Chrome, bookmark as a favorite with whatever name you want, i.e. EDMS Content Explorer, Scanner, etc.
Log in with your CBMS credentials

On the left navigation pane, under TASK, click on All Tasks
Perform a search to view the tasks you would like to see (see the Content Explorer - General Users guide to learn how to search and create filters)
3) Select a task from the search results to view the task

4) In the Task Actions card click the Reassign Task button
5) In the Reassign Task dialog click the X next to the currently assigned user to remove

6) In the Reassign Task dialog search for a username to reassign the task to and select the user

7) In the Reassign Task dialog click the OK button
Change a Task’s Due Date

1) On the left navigation pane, under TASK, click on All Tasks
2) Perform a search to view the tasks you would like to see (see the Content Explorer - General Users guide to learn how to search and create filters)

3) Select a task from the search results to view the task.

4) In the Task Actions card click the Modify Task button

5) In the Modify Task dialog change the due date to the desired date. Note: Do not modify the Instructions field

6) Click the OK button
Cancel a Task

1) On the left navigation pane, under TASK, click on All Tasks
2) Perform a search to view the tasks you would like to see (see the Content Explorer - General Users guide to learn how to search and create filters)
3) Select a task from the search results to view the task
4) In the Task Actions card click the Cancel Task button
Review Documents Marked as Orphaned

1) On the left navigation pane, under WORKFLOW > Auto Form, click on the Review Orphaned queue for your county.

2) Select a document from the search results.
3) Select the **Route Forward** button from the workflow toolbar

4) In the Route Workflow Item dialog choose **Mark Invalid** to move the document to the Invalid drawer. Or choose **Not Orphaned** to route the document to Misc. Indexing to be indexed
Review Returned Tasks

1) On the left navigation pane, under WORKFLOW > Auto Form, click on the **Review Returned Tasks** queue for your county.

2) Select a document from the search results.
3) Select the **Route Forward** button from the workflow toolbar

4) In the Route Workflow Item dialog choose **Mark Invalid** to move the document to the Invalid drawer. Or choose **Route to Misc. Indexing** to route the document to Misc. Indexing to be indexed
Review Aging Batches

1) On the left navigation pane, under WORKFLOW > Auto Form, click on the Review Aging Batches queue for your county

2) Select a folder from the search results
3) Select the Route Forward button from the workflow toolbar

4) In the Route Workflow Item dialog choose **Mark Invalid** to move the document to the Invalid drawer. Or choose **Route Batch to Misc. Indexing** to route the batch to Misc. Indexing to be indexed.
Review Aging PEAK Documents

1) On the left navigation pane, under WORKFLOW > Auto Form, click on the Review Aging PEAK Documents queue for your county.

2) Select a document from the search results.
3) Select the **Route Forward** button from the workflow toolbar

4) Choose where to route the document
   a) If the document is invalid, in the Route Workflow Item dialog choose **Mark Invalid** to move the document to the Invalid drawer. Or choose **Route Batch to Misc. Indexing** to route the batch to Misc. Indexing to be indexed
   b) If the document is valid, in the Route Workflow Item dialog choose **Wait for Case ID**. In CBMS, find the document and add the Case ID and it will be automatically processed in EDMS to add to the case folder and create tasks.

**Editing the Date Received - Power User**

1) On the left navigation pane, select Client Documents.
2) Search for the document to edit.
3) Double click to open the document.
4) Click on the Date Received and select the edit icon.

5) Type in the correct date and select the OK button.