

# Content Deep Dive

Your Webinar  
Questions Answered



## 1. New content defaults seems to reverse alphabetical for sort results? If that is correct, why reverse? Can the admin set it to default to alphabetical?

By default, search results and the Unfiled Inbox are sorted by Created Date, with the newest documents listed first. The Recycle Bin is sorted by Recycled Date with the most recently recycled documents listed first. When you select another column to sort by, the first click sorts in ascending alphabetical order (A–Z), and the second click sorts in descending order (Z–A).

The default sort order cannot currently be configured by an administrator; however, admins can create searches with the desired sort order and share the links to them with their users.

## 2. How do you see your areas, documents, etc. without searching?

In the new Content experience, everything starts with a search. You can see the list of Areas and Document Types by clicking on the down arrow from the simple search dropdowns. From there, you can select an Area and/or Document Type, execute a search, and then scroll through the table to see the documents filed. This is similar to expanding an Area and scrolling through the tree, only with many fewer clicks, because you will not need to expand every folder to see the documents filed within them.

## 3. Is there a way to search for the documents having that value missing message?

You can't search directly for documents with "VALUE MISSING" in the document name. However, because document names are generated from key fields, you can use an advanced search to find documents missing the relevant key-field value.

For example, if documents are named "Admissions Application – {Document Date}", a missing Document Date results in the name "Admissions Application – \*VALUE MISSING\*". To find these documents, use the following advanced search criteria:



**Document Type is Admissions Application  
AND  
Key Field 'Document Date' is missing**

This returns all Admissions Application documents that don't have a value in the Document Date key field.

#### **4. Wouldn't all users have access to all Unfiled documents until they are given a Doc Type?**

No, Area-Documents Type permissions are still respected. Users must be granted view access to Area-Documents Types, including the 'Unfiled' document type, in order to see them in the table. Users will only see documents with the 'Unfiled' type if that document is in an Area where they have view access to the 'Unfiled' type. Otherwise, the document will not display in the new Unfiled Inbox for that user.

#### **5. From the Recycle Bin, can you send a document to a different area than where it was misfiled?**

In this case, you would need to restore the document first, and then you can refile it via the Key Fields panel. However, the Key Fields panel is locked for editing for documents in the Recycle Bin.

#### **6. Can you still purge all in the recycle bin or if you select all, it will only select 1000 at time?**

The "Delete All" button in the Recycle Bin (or selecting all of the rows and then clicking "Delete Selected" button) will only delete the documents returned in the Recycle Bin at that time. If you have more than 1000 recycled documents, those would not be included in the delete action.

#### **7. Is the Etrieve Download Manager needed anymore for batch document downloading or can it all be done from the new viewer interface by using advanced search and exporting?**

Etrieve Download Manager will still be utilized, if you're downloading over a certain number of documents (as determined by the Download Type Range Counts in the Content Advanced Settings).

#### **8. Can you create different filing rules based on document type? For example, we have a field for 'term'. We need to file by term instead of document date for student records. Document date could be 5/2026 (2025-2026 academic year), but it needs stored in 2026-2027 academic year because the transaction was for a future term (Fall 2026). Student records = file by term. HR document = file by fiscal year/true document date.**

Yes, more information will be provided soon, but we'll be moving to a "required key fields for filing" model, instead of the current folder structure model that governs whether a document goes to Unfiled or not. In this case, you'll be able to mark the Term field as required to file on your Student Record document types and the Document Date as required to file on your HR documents.

## **9. Can we export within a file (not in unfiled or recycle bin)? I.E., an entire employee file?**

Yes. In this case, you'd do an exact match search for the employee, and then select all the documents that return in the search, and download.

## **10. In our environment, deleting an individual page from a document permanently removes that page and does not send it to the Recycle Bin. Has this behavior changed in the new experience?**

This behavior has not changed. Deleting an individual page will permanently remove the page and not send it to the Recycle Bin. Users are informed via a confirmation dialog that the page will not be recoverable when they take the delete page action.

## **11. Can we change default search criteria – i.e. include document type so it's similar to old version of files/drawers?**

Assuming this means the default columns that return in the search results table, there is not currently a way to customize the default. However, you can add Document Type via the 'Columns' button and save the search. We'd love for you to submit an insight for customizing the default results table, if that's something that would be useful!

## **12. When uploading do all fields have to be completed? Say you are digitizing a file with multiple document types.**

All fields do not have to be completed on upload. In order to avoid the document going to the Unfiled Inbox, all fields required to file would need to be completed, but that likely doesn't constitute all fields on a document type. Also, if you prefer to do all your uploading at once, and then come back to file later, you can leave fields required to file blank. This means the document(s) will go to the Unfiled Inbox, but you can return to index them later.

## **13. Will the search pull out a complete list of all documents for an area or a specific drawer as in the legacy content?**

If you conduct a search for an Area, the new search will return the top 1000 most recently created documents filed to that Area. If you add document type, category, or key field criteria to the search (which would correspond to the folder/drawer levels in the tree), it will return the top 1000 most recently created that match the additional criteria.

For searches that return over 1000 results, we do have plans to add functionality to show the next 1000 documents that meet the search criteria, but that work has not been scheduled yet.

## **14. Actions are automatically saved? No need to hit a "SAVE" button anywhere?**

In most cases, actions are automatically saved. The exceptions are Redactions, where you must click 'apply' and then confirm and image cleaning (brightness, contrast, crop, auto-deskew, and invert colors), where you must select whether to apply to the current or all pages and then click 'Save'.

## **15. Do the filters only filter the original 1000 unfiled docs or does it allow up to 1000 of the filter type docs to load? If it allows more of the filtered types to load, is the Area search option needed?**

The filters only filter the original 1000 unfiled documents in the table. They do not pull in new documents when the filters are applied. This is why the Area search is needed.

## **16. We don't use Etrieve for student records, or employee records. We only use it for AP filing. How can we drill down to find a vendor in a certain year?**

In the simple search, you can use the top search bar to search documents filed to specific vendors. And then if you want to drill down further to documents from a certain year, move over to Advanced Search and then add a Key Field row, select the date key field you want to search by.

## **17. Will the bulk action feature be accessible in Workflows?**

Bulk actions from the Submission table in Central is not currently available. We'd love a Product Insight explaining your use case to help get it prioritized. You can submit it in the Community or the Help Center inside the application.

## **18. I see your Upload Document button has a dropdown arrow, that I don't see in my environment. Are there new features being developed related to uploading documents, such as bulk uploads?**

The dropdown arrow will appear if you have a scan license and/or you have access to the Web Capture product. If you do not have a scan license or access to Web Capture, you won't see the dropdown arrow by the upload button. Bulk uploads in Content are not currently on the roadmap, but we'd love a Product Insight if this is something you're interested in. You can submit it in the Community or the Help Center inside the application.

## 19. Can you re-review how to set up the columns to display– the mechanics?

Yes, I will make sure to cover that in the follow-up webinar on November 4! Also, check out the “Advanced Search and Upload” video, linked under New Search Walkthroughs (towards the bottom of the page) on the [One Stop Hub](#). The information about columns starts around the 2-minute mark.

## 20. From the search results table, can you export search results AND/OR the documents or just 1?

You can export the search results to a CSV and you can export the documents themselves. If you wish to export all of the search result data from the table, simply click ‘Export’. This will export all of the column data to a CSV. If you wish to download documents from the table, select the rows that contain the documents you want to download. Then click ‘Export Selected’. From there, you’ll have the option to choose to download the documents or to download the data from the selected rows to a CSV.

## 21. What if there are more than 5 searches?

The recent saved searches on the homepage are just the 5 most recently executed saved searches to give you quick access. However, your full list of saved searches can be found under the “Saved” tab.

## 22. If I search by a check number, how do I see everything that is linked to it? Also, how do we link documents?

After searching by check number, open the document you wish to view and then expand the “Related” section in the key fields panel. “Related” is the new “Linked” documents. To link related documents together, select the rows containing the documents you wish to link in the search results table. After you have rows selected, you’ll see a “Link Documents” button. Click that button to link the selected documents together and make them related.

## 23. When downloading multiple documents from the table, do all linked documents download with the selected document?

Downloading from the search results table does not include the linked related documents. Exporting linked related documents is currently only available via the “Print” action in the viewer toolbar. When “Include Related Documents” is selected in the Print action, all of the linked related documents will display in the print preview, which can then be saved together as one document.

## **24. What happens if you edit a shared search? Does that edit show up for those you shared the search with?**

No, any edits made to a search after it is shared will not automatically show up for users it was shared with. In order for others to receive those updates, you would need to click the 'Share' button again and share the link to the updated search.

## **25. Is it possible to have the related documents under the original document? Not having the documents viewable together will be problematic in our filing.**

Related documents will display in the "Related" section (this is the same as "Linked" documents in legacy, just with a new name). You can click on the link from the "Related" list to view the related documents and easily navigate between the related documents.

## **26. Will this new experience help improve document loading performance? With the current experience, there are several instances where documents load slowly. For example, when a coworker sends me a link, the document may initially display only the first few pages (or none), while the remaining pages can take several minutes to load.**

In most cases, yes. The new viewer has a feature called "linearized downloading" which allows a document to be viewed while it is still loading. This will enable most large documents to be viewed quicker than in the legacy experience. That being said, the new viewer may not always result in faster loading, particularly for documents that are not in a PDF format.

## **27. In your bookmark example, if you have admissions applications across all student records and want to have the academic history in each of the applications bookmarked, is there a way to bookmark in bulk across similar documents?**

Similar to annotations, bookmarks can currently only be applied on a per-document basis. However, we'd love a Product Insight, if this would be something that would be useful for your business process. You can submit it in the Community or the Help Center inside the application.

## **28. Will users still be able to scan directly into Etrieve as they do now?**

Yes, users can still scan directly into Etrieve either via the dropdown menu on the Upload Document button, or through Add Pages by Scan button in the document editor in the viewer. The Kofax scanning utility is still required.

### **29. When redacting, will it save the document as a redacted document, keeping the original intact?**

Yes, it will save a redacted copy of the document. Users with the “View Unredacted” permission will be able to view and download the document without redactions.

### **30. Are we able to preview this update in our environment prior to being migrated?**

Clients who have migrated to the IAM security platform will see the Try New Content button in the top left, allowing users to try out the new experience before the full transition. If your institution has not yet migrated to IAM, Etrieve Admins can review the [FAQ and timeline](#) for more information.

### **31. How do we add pages to a document? This used to be the paperclip button.**

This is now done via the Document Editor in the toolbar. Click the Document Editor and then “Add Pages”.

### **32. Is there any way to force every sticky note to full size? We have a lot of PT and FT faculty who look at records, and need to notice Notes, etc.**

There is not currently a way to force those to full size. In this case, you can use the customized colors and shapes to make them stand out, or use the Text annotations, instead of Notes, where you can customize the text size and color. You can also use the shapes annotation to place a border around your Text annotations.

### **33. What is the paper with the eye?**

This is the “View without redactions” button. Users will only see this button if they are viewing a document with redactions and if they have the “View unredacted” permission on that document type.