

WARM User Guide - Chrome

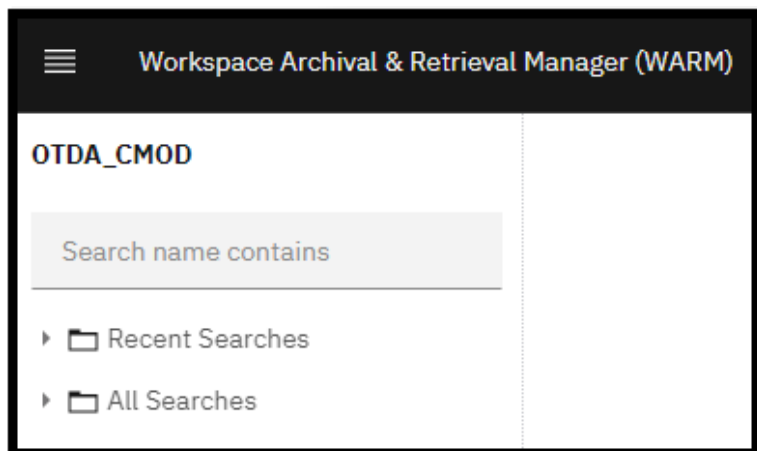
This document is a brief guide to the navigation of IBM's Content Manager OnDemand application (CMOD), also known as WARM. You will be presented with a few side-by-side screen captures that show what it looks like in COLD vs what it looks like in WARM. Please note Google Chrome was used for the screen captures. Edge may look and behave differently.

Logging In

You will use the same method to log into WARM as you do when you log into COLD. Whether you use Centraport or NY.GOV to log in, just look for the WARM option.

Main Screen

You are now logged in and at the main screen. On the left, there are two options.



Recent Searches – this will show groups that you have recently opened. When you first use WARM this will be blank.

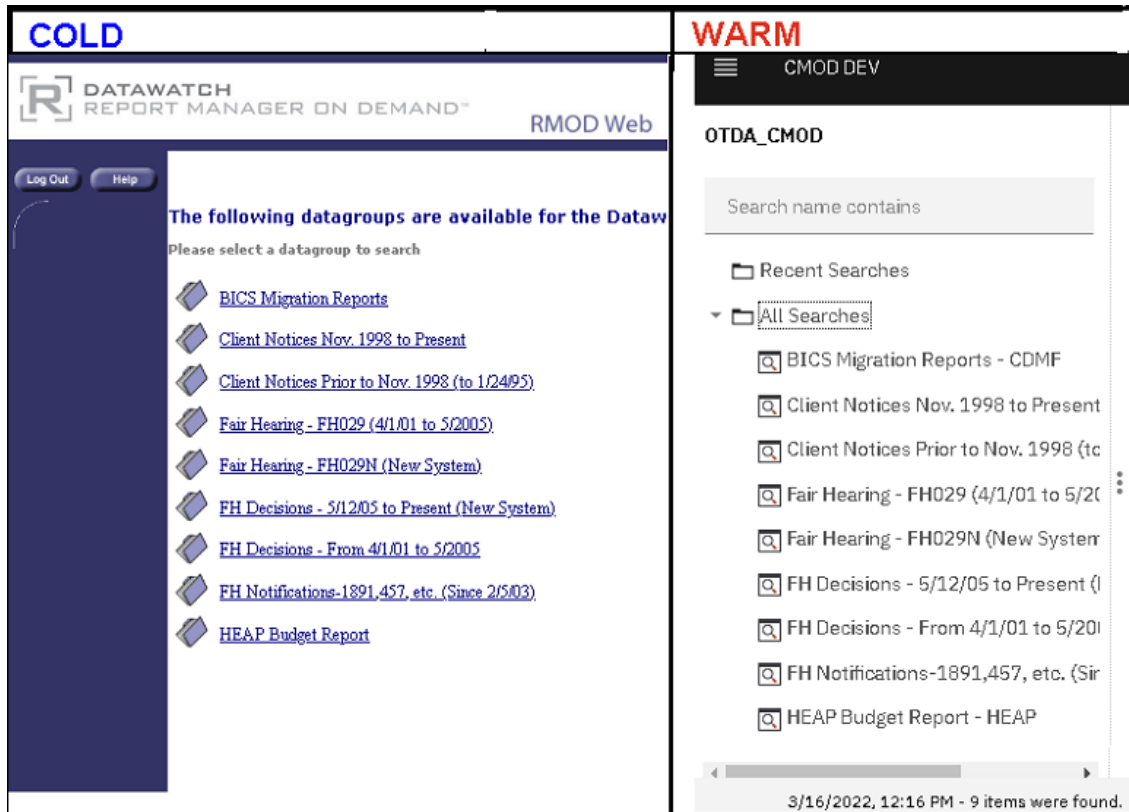
All Searches – this shows you every group to which you have access.

Click on the arrow to expand All Searches.



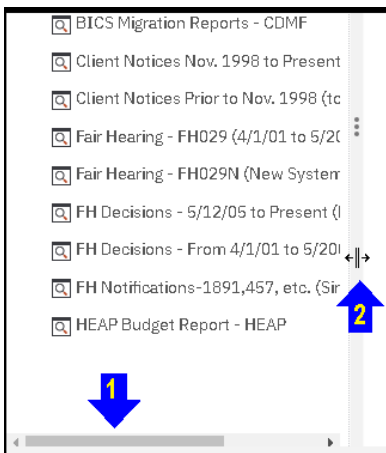
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You can now see the list of application groups you have been assigned.



Application Groups: An application group is the same as a data group in COLD. You have access to the same groups in WARM that you did in COLD.

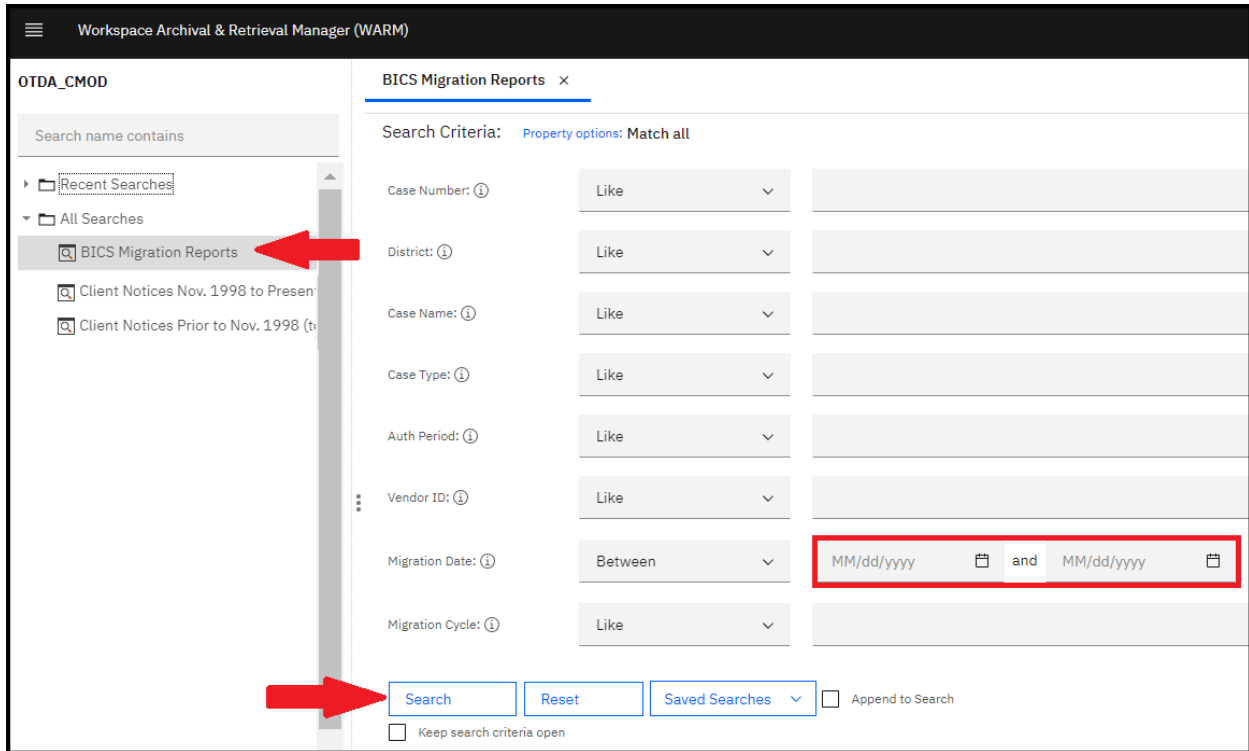
There are two ways to see the entire application group name in WARM. You can 1. use the scroll bar at the bottom or 2. by using the bar with vertical ellipses to resize the screen.



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Searching

Select an application group by clicking on the name. This opens the search page. Enter the criteria. Click the Search button at the bottom of the screen. *WARM will not perform a search without search criteria.*



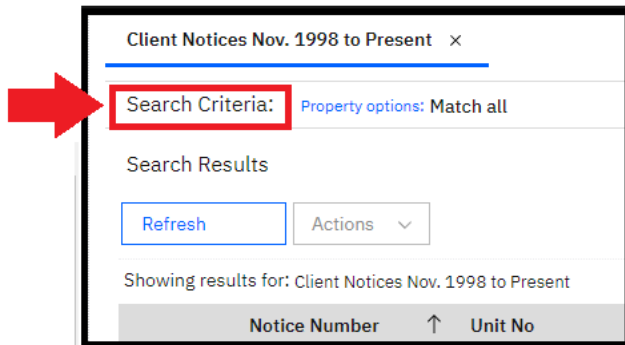
DATE FIELDS: When you click on the date field, a pop-up calendar is displayed. There are a few different ways to enter a date:

1. You can select the date using the drop down next to the month
2. Use the left or right arrows on either side of the month
3. Select the year at the bottom of the page at the bottom to change the year
4. You can type in the date

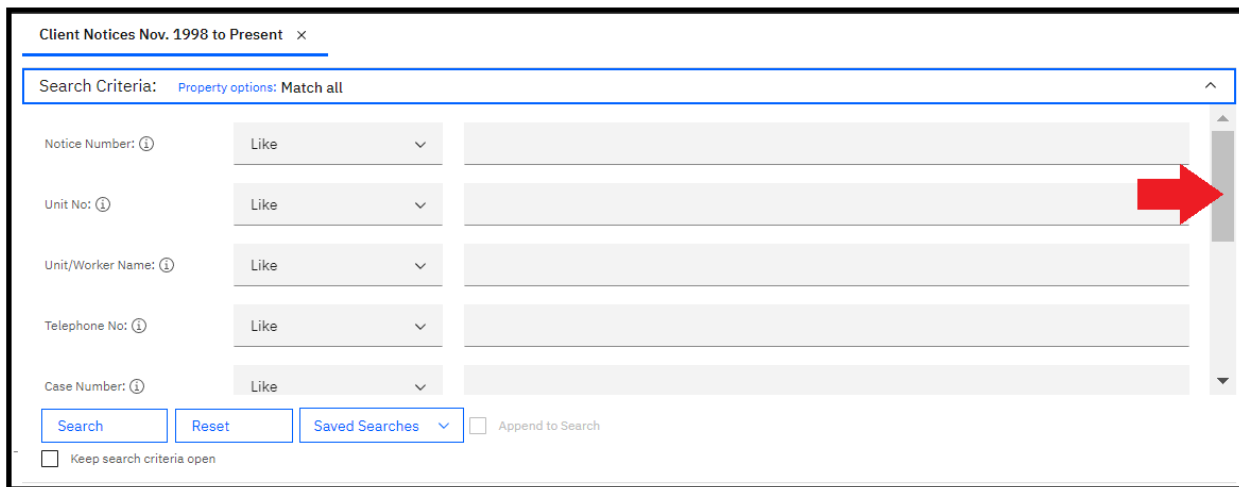


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To return to the search screen, click on 'Search Criteria'



This will re-open the search criteria screen. You may have to use the scroll bar on the right side to see all the fields.



To clear all search criteria, click on the reset button on the bottom of the search screen.

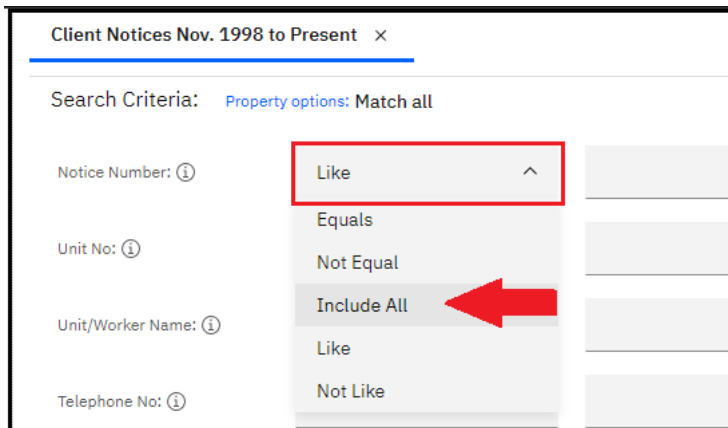


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Searching for Multiple Notice Numbers

There are only two groups that allows for multiple notice number search: 'Client Notices Nov. 1998 to Present' and 'Client Notices User Test'.

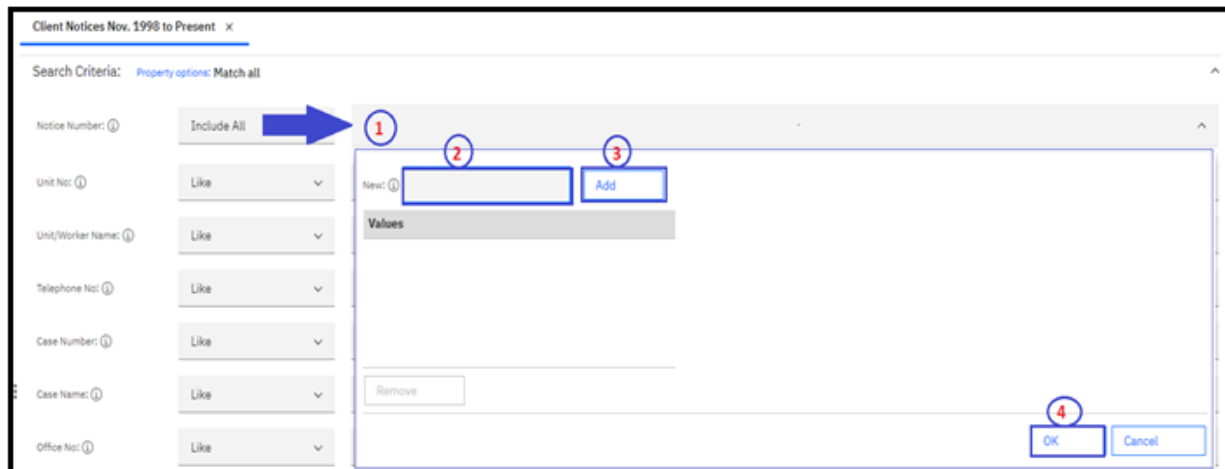
To search for multiple notice numbers, click on the 'Like' box. This will present different choices. Choose 'Include All'.



Click in the box on the right side to enter the first notice number (1). You will see a pop-up box which will allow you to enter multiple notice numbers at a time.

Enter the first notice number (2) then click 'Add' (3).

Repeat the process as needed. When you are done, click 'OK' (4). You are returned to the Search Criteria screen, click 'Search'.

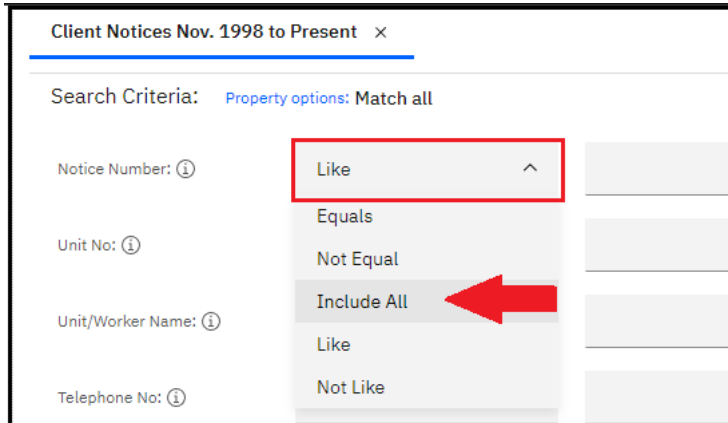


****Use the instructions on the next page if you are trying to copy notice numbers from a different screen.**

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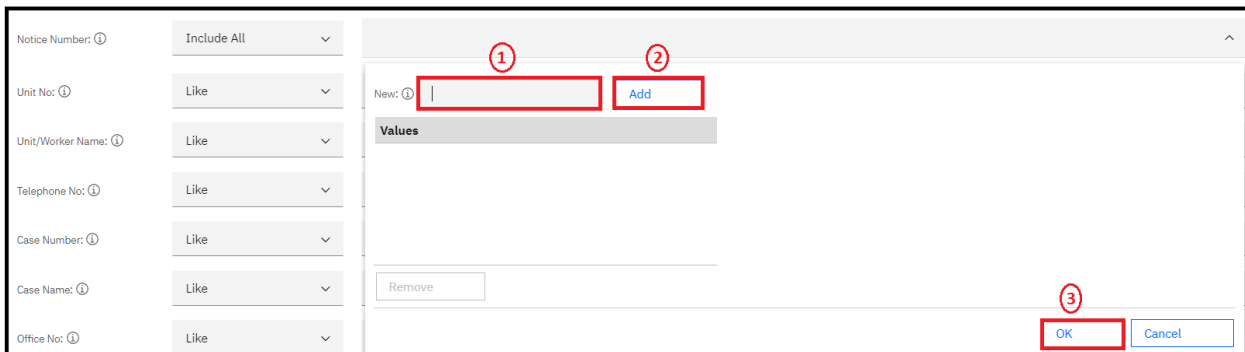
Searching for Multiple Notice Numbers using Copy & Paste

To search for multiple notice numbers, click on the 'Like' box. This will present different choices. Choose 'Include All'.



Click in the box on the right side to enter the first notice number. You will see a pop-up box which will allow you to enter multiple notice numbers at a time.

Enter the first notice number (1), click 'Add' (2) then click 'OK' (3).



You will be returned to the regular search screen. Now you can go to your other screen to copy the next notice number. When you return to the WARM search screen, click in the box to enter your next notice number.

Repeat the process as needed. When you are done, click 'OK'

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Hit List

After entering the search criteria and clicking 'Search', your hit list is presented.

COLD		Case Number	District	Case Name	Case Type	Auth Period	Vendor ID	Migration Date	Migration Cycle	Rep Name	Doc Type	St.Pg	No. of Pgs
	<input type="checkbox"/>		ALBANY				PC140000	04/01/2020	6	00000208	Text	142834	1
	<input type="checkbox"/>		ALBANY				PC080000	04/01/2020	6	00000208	Text	142830	4
	<input type="checkbox"/>		ALBANY				NIMO	04/01/2020	6	00000208	Text	142827	3
	<input type="checkbox"/>		ALBANY				GFD00503	04/01/2020	6	00000208	Text	142826	1

WARM		Case Nu...	Distr...	Case Name	Case...	Auth Period	Vendo...	Migrati...	Migr...	Doc...	Pages	Load Date
			ALBANY				00332498	10/01/2019	6	Text	1	2022-03-18 09:!
			ALBANY				01240	10/01/2019	6	Text	2	2022-03-18 09:!
			ALBANY				10001	10/01/2019	6	Text	1	2022-03-18 09:!

COLD displays 30 results per page. WARM returns 200 results per page up to a maximum of 3000 total results. You should always strive to see less than 3000 results. *If 3000 results are returned, you may not see the records you need or expect.*

Document Types

There are two different document types: text and PDF. Each document type is depicted by different icons.

This icon indicates the document is a text

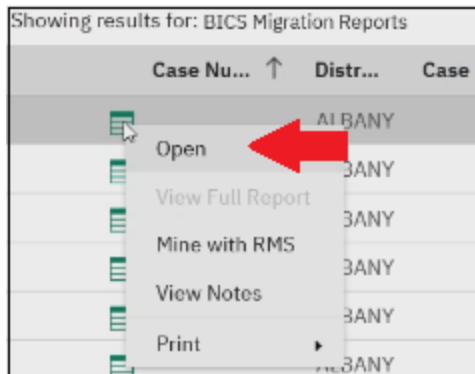
This icon indicates the document is a pdf


The icon you see will depend on the group you access.

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Selecting a document to view

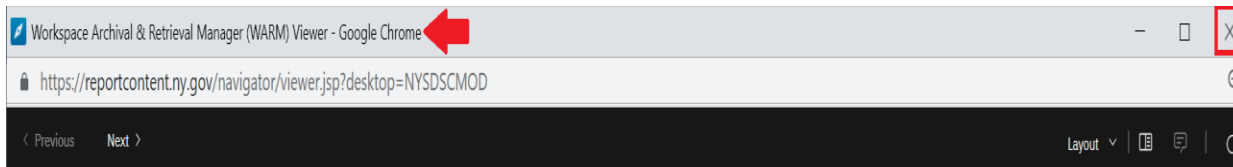
From the hit list, right click on the document icon. Click 'open' from the pop-up menu.



PDF documents  will open in a new tab.

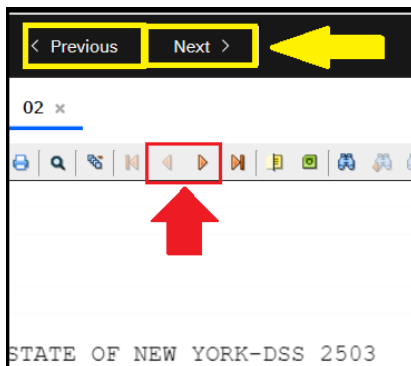
Text documents  will open in a viewer.

When viewing a text document, you will see 'Workspace Archival & Retrieval Manager (WARM) Viewer' at the top left of your screen. To return to the hit list, click the top right X. This will close the viewer window.



Navigating text documents

There are two different sets of arrows for scrolling. The yellow set moves you between reports/documents in your hitlist. The red set moves you within the report/document.



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To select multiple documents: For multiple documents in a row on the hit list, press and hold the Shift key and click on the first and then, the last document. Do not click on the document icon or it will open the document.

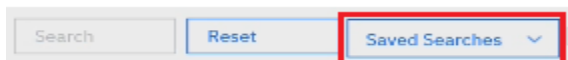
For documents that are not in a row on the hit list press and hold the Ctrl key and click on each document you want to include. Right click on the last document you selected.

To return to the search window: Click on 'Search Criteria' and it will re-open the search criteria window. See page 4 for screenshots.

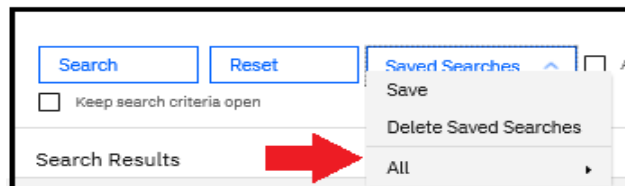
Saved Searches

To View Saved Searches

Choose the application group you want to search. On the search screen at the bottom of the screen, click 'Saved Searches'. *This will show you any query you have saved in WARM. It will not show you searches saved in COLD.



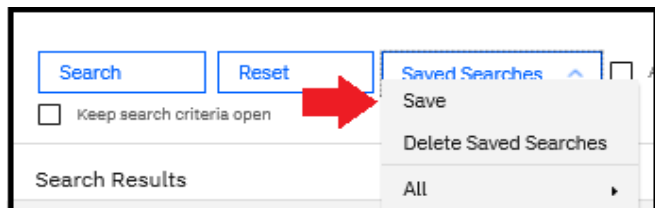
Click 'All'.



You will see a list of searches that you have access to. For most users this will be blank until they create and save their own searches in WARM.

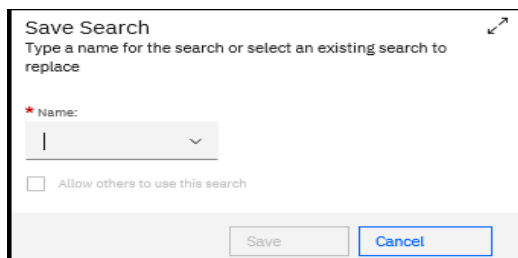
To Create a new Saved Search

Choose the application group. On the search screen, enter the parameters for your search. At the bottom of the screen, click 'Saved Searches' then 'Save'.



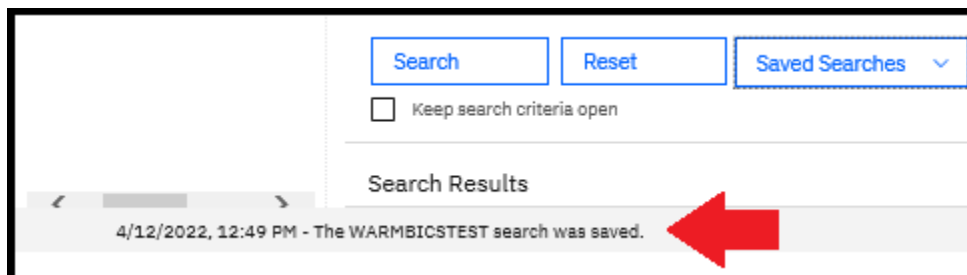
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Choose a name for your search and click 'Save'. Do not use special characters in the query name. This can cause unexpected results.



The 'Save Search' dialog box contains the following elements: a title 'Save Search', a subtitle 'Type a name for the search or select an existing search to replace', a text input field with a red asterisk and the label 'Name:', a dropdown menu below the input field, a checkbox labeled 'Allow others to use this search', and two buttons at the bottom: 'Save' and 'Cancel'.

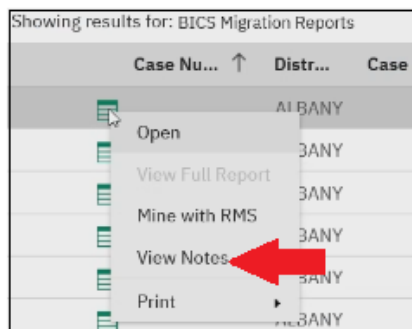
At the very bottom of your screen, you will receive the confirmation that your query was saved.



Annotations

To View an Annotation

From the hit list, right click on the document icon. Click 'View Notes' from the pop-up menu.



If there are no annotations for the document, you will see

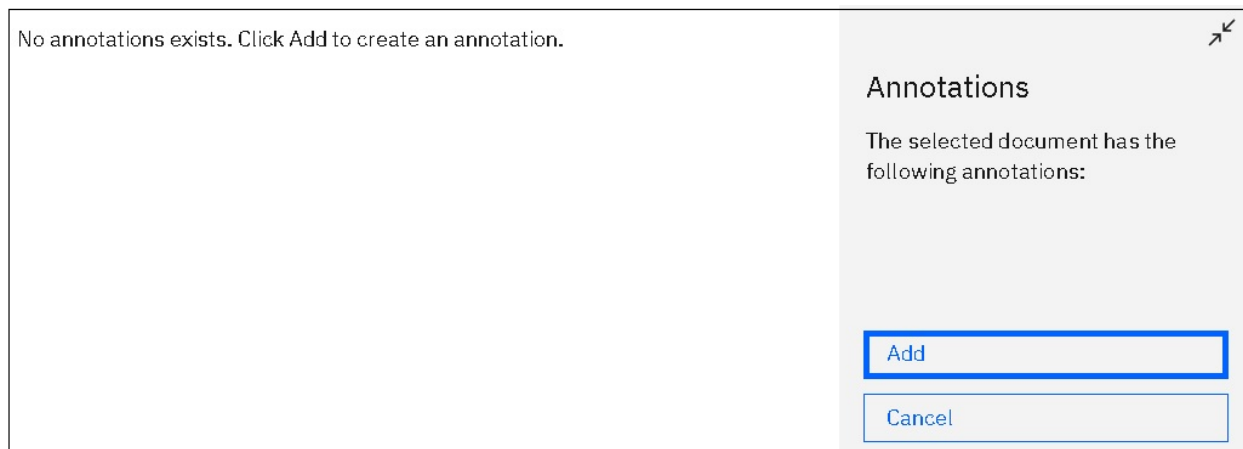
No annotations exists. Click Add to create an annotation.

To exit click 'Cancel' on the bottom right of your screen.

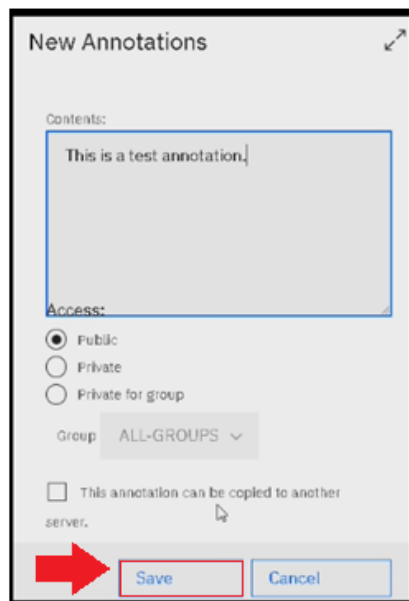
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To Create an Annotation

From the hit list, right click on the document icon. Click 'View Notes' from the pop-up menu. A new window will open. Click 'Add' on the bottom right side of the screen.



Another window will open. Type your note. The Access option should remain Public. Click 'Save'.



After clicking 'Save', you will be returned to the main annotation window with the confirmation notice.



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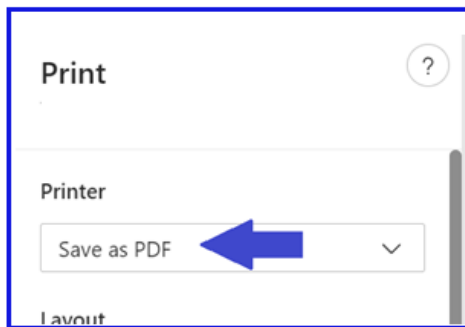
Downloading A Document

PDF Documents

There are two ways to download. The first is by opening the document. **Do not click on the download icon on the right side of the screen. Currently, this button will result in an error.** Instead, click on the print icon.

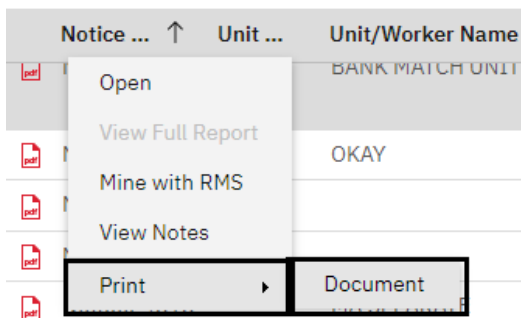


Under 'Printer', choose 'Save as PDF' from the drop down list.



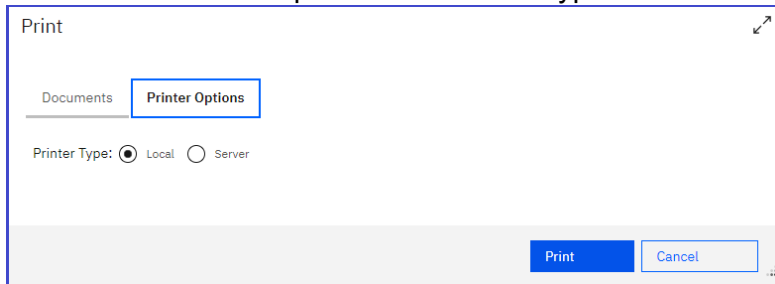
Click 'Save'. Choose the location you want to save the file. The file name defaults to 'PRO' which should be changed to something more meaningful. Click 'Save'

The alternate method for downloading is from the hit list, right click on the document icon. Do not click on the Download option. Instead, click 'Print', then 'Document' from the pop-up menu.

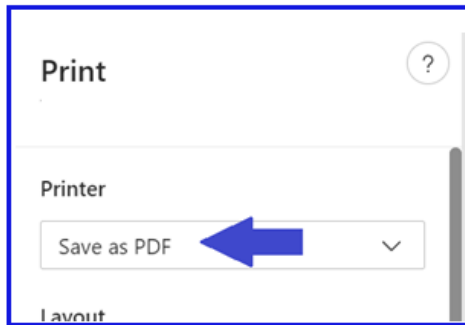


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Click on the 'Printer Options' tab. Printer Type should be 'Local'. Click 'Print'.



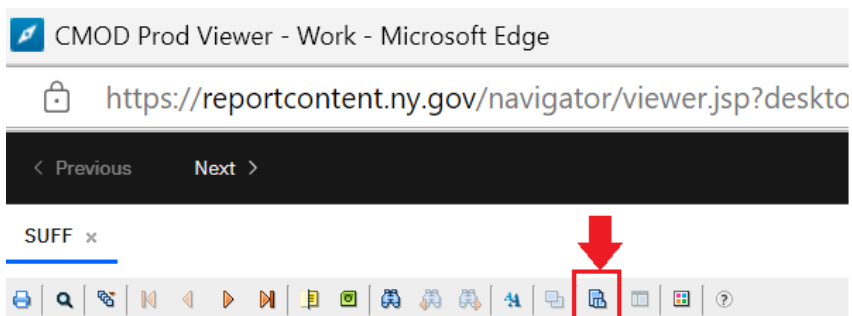
Under 'Printer', choose 'Save as PDF' from the drop down list.



Click 'Save'. Choose the location you want to save the file. Change the default name to something more meaningful. Click 'Save'

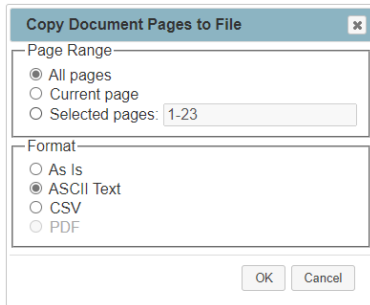
Text Documents

Open the document you would like to download. In the CMOD Prod Viewer you will have icons on the top left of the screen. When you hover your mouse over the icon shown below you will see that it says 'Copy pages to file.'



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Click on the icon. In the pop-up window, make sure the Page Range is 'All pages' and the Format is 'ASCII Text'. Click OK.



At the bottom of your screen you will see the downloaded file.



To open, click on it.

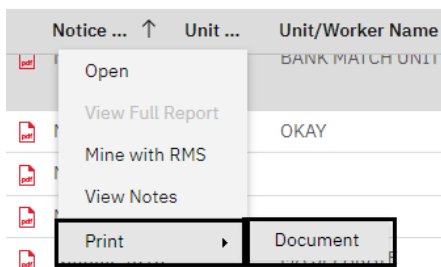
Associate file type: When you open the downloaded text file you may get prompted to choose which application should be used to open .lin files. Choose Notepad.

If you aren't prompted to choose an application to open the file and are presented with characters instead of letters you will need to associate the .lin file extension to Notepad. If you are unsure how to do this or you don't have access, please consult your supervisor or your IT support team for assistance.

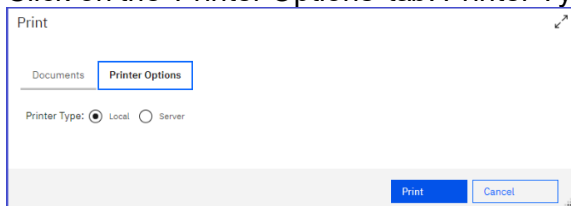
Downloading Multiple Documents

PDF Documents

Select your documents and right click. Do not click on the Download option. Instead, click 'Print', then 'Document' from the pop-up menu.

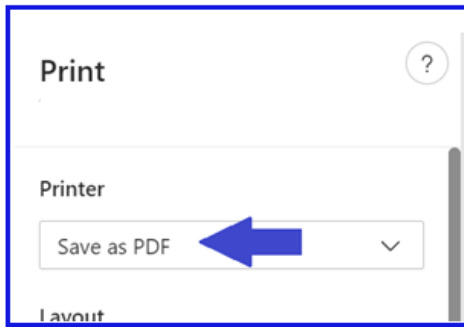


Click on the 'Printer Options' tab. Printer Type should be 'Local'. Click 'Print'.



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Under 'Printer', choose 'Save as PDF' from the drop down list.

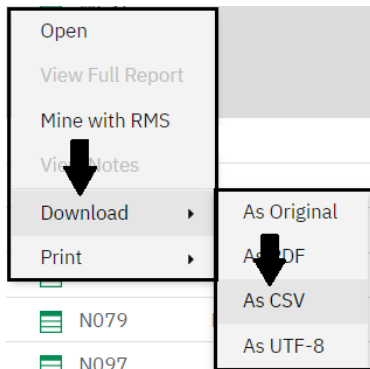


Click 'Save'. Choose the location you want to save the file. Change the default name to something more meaningful. Click 'Save'

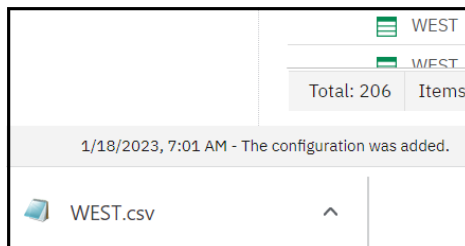
Text Documents

Please note: If you use .csv files for excel you will have to disassociate the .csv file type from Excel. You will need to be prompted which application to use each time you are working with this type of file.

Select your documents, right click and choose 'Download as CSV'.



This will create a zip file and will display at the bottom left side of your screen. Click to open.

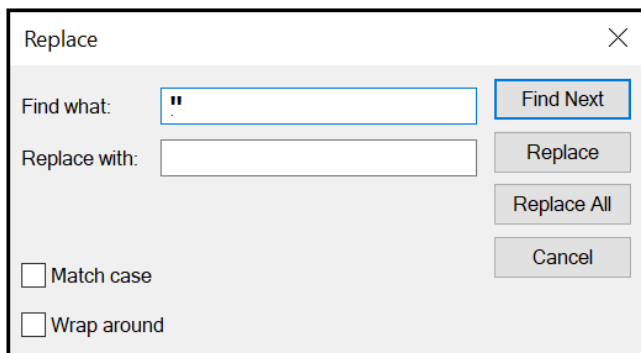


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The files are displayed in your download directory. When you open the text documents you will notice tic marks (“) on each side of the pages.



These tic marks can be removed. Open the document, click on 'Edit' then click 'Replace'. In the 'Find what' area in the dialog box type ". Leave the 'Replace with' area blank, then click the 'Replace All' button.



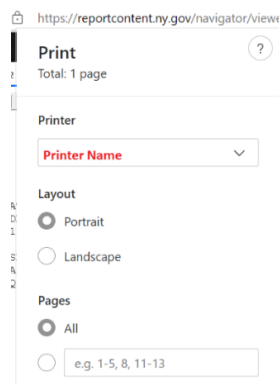
Printing a Document

PDF Documents

Open the document you want to print. Click on the printer icon.



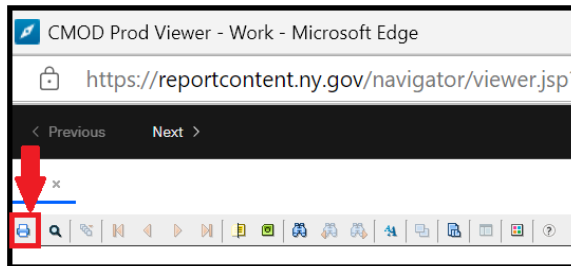
This will open the printer options page. Select your printer and then click 'Print'.



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Text Documents

Open the document you want to print. Click on the printer icon.

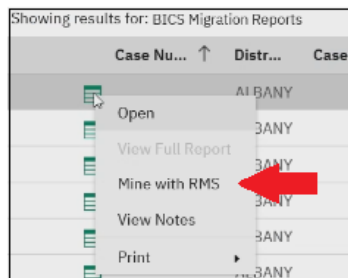


The print window opens, make sure 'All pages' and the correct printer is selected, click 'Print'.

Data mining

Please note: This option is not available for all groups.

Select your documents from the hit list. To select multiple documents, refer to the instructions on page 7. Once you have your documents selected, right click on the last document you selected. Choose the 'Mine with RMS' option.



A pop-up window will appear. If there is more than one model to choose from you will see a down arrow.



Choose a model, click 'Submit'. This applies the model to the data and opens the RMS window in a new tab.

*If there is only one template, it will automatically be applied to your documents and a new tab will open with your results.

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Logging out of WARM

To log out or close out of warm you simply close your browser. Be sure to close the entire browser window not just the tab.

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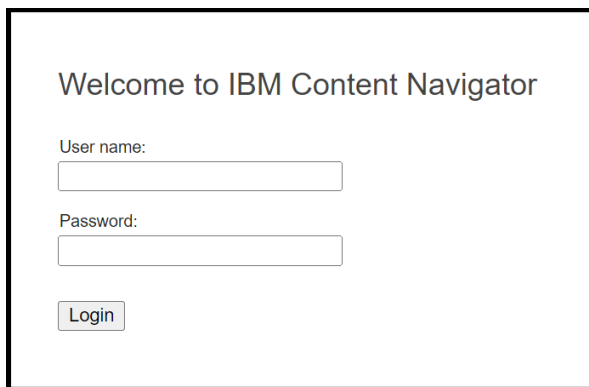
Troubleshooting

Issue: WARM isn't responding.

Resolution: This can be an indicator that you have timed out of WARM. The screen appears as if you are still connected but you really aren't. You will need to close the browser window, not just the tab. Open a new browser window and connect to WARM again.

Issue: Prompted to log in again.

Resolution: You have timed out of WARM. Close the browser window, not just the tab. Open a new browser window and connect to WARM again.



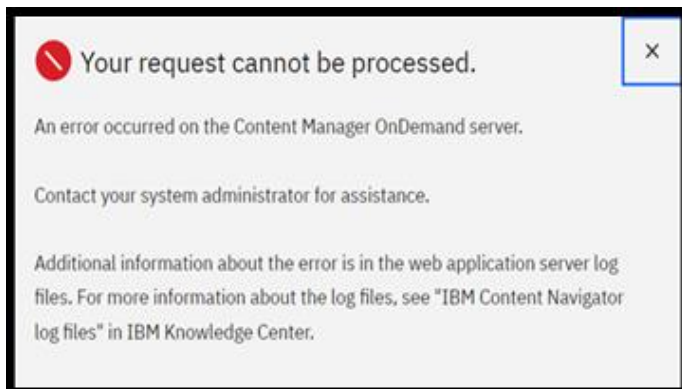
>Welcome to IBM Content Navigator

User name:

Password:

Issue: Your request cannot be processed.

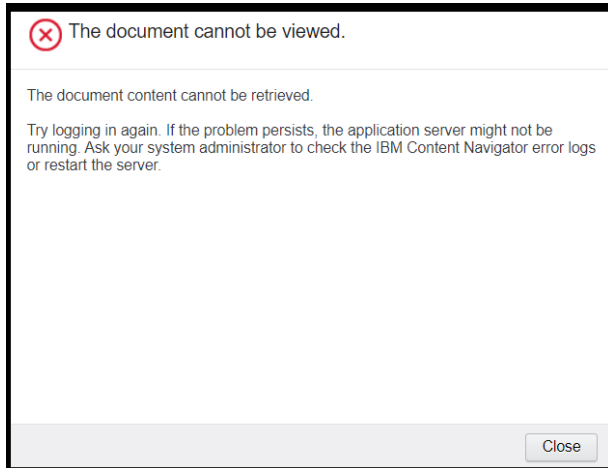
Resolution: You have timed out of WARM. The screen appears as if you are still connected but you really aren't. You will need to close the browser window, not just the tab. Open a new browser window and connect to WARM again.



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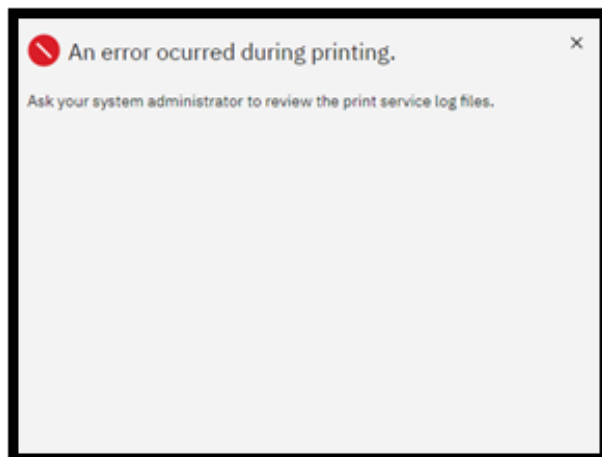
Issue: The document cannot be viewed.

Resolution: Try logging out of WARM. You will need to close the browser window, not just the tab. Open a new browser window and login again. If the problem persists, contact the WARM team at otda.sm.bit.coldmail@otda.ny.gov.



Issue: An error occurred during printing.

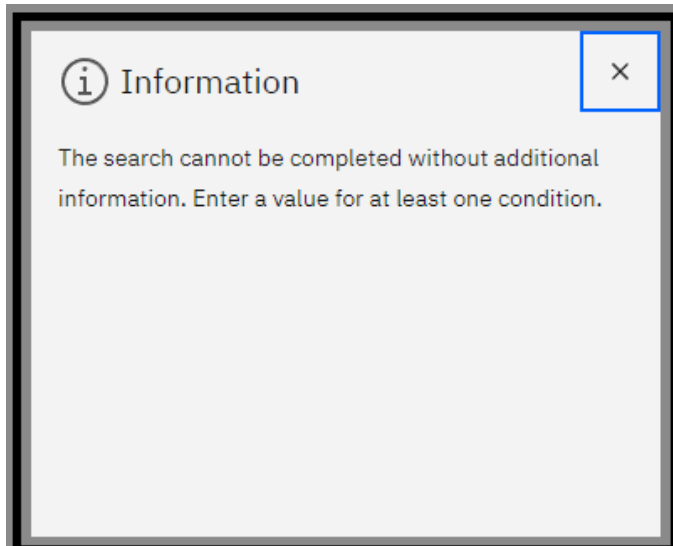
Resolution: Refer to the printing instructions on page 15 for PDF or page 16 for text. If the instructions do not help, contact the WARM team at otda.sm.bit.coldmail@otda.ny.gov and provide details of your issue.



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Issue: Search cannot be completed.

Resolution: WARM will not perform a search without search criteria. Enter search criteria.



Issue: Error when downloading a PDF document using the download icon.

Resolution: This issue is caused by using the download button in the browser. This button is not functional with WARM. Please refer to the instructions in the Printing section of this guide.



Issue: There are blank pages in the client notice.

Resolution: This is not an issue. WARM processed daily files differently than COLD. These blank pages are part of the original file.

Issue: All my cases are not displayed when using my worker code as part of my search criteria.

Resolution: WARM stores data exactly how it is sent. For example, if Jane Doe's worker code is AB but was entered as 'A B' on some records, WARM will not match on the 'A B' records. You will have to use a wildcard in your search. In the search criteria box, you would enter 'A%' as the worker code. Please keep in mind using a wildcard will return all results that match. You should always use your county code, if available, to narrow your returned results.

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