Records Explorer

MANUAL

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1 ACCESSING THE APPLICATION

Open My Computer. Records Explorer will display under your network drives.

A desktop shortcut can be created by highlighting the program name and dragging it onto the desktop.
Double Click on EFT (Records Explorer).

You will be given the following options in the right hand screen:

Double Click on USYD TRIM_Production to enter the live dataset.

You are now in Records Explorer.

**NOTE:** If you have any difficulties completing this step please contact Records Online immediately to have your access reviewed.

If you double click Records Explorer and there are no grey datasets listed, you will need to have the datasets configured through TRIM. A Records Online Helpdesk Officer can talk you through this on the phone, or else you can arrange for a Helpdesk Officer to come over to you and configure the datasets for you.

## 2 DISPLAY

Records Explorer is an interface for TRIM, the University of Sydney’s enterprise record keeping system. Records Explorer mimics the look and functionality of Windows Explorer, whilst interacting with TRIM.

### 2.1 FOLDERS VIEW

When launching My Computer or opening a shortcut into a Records Explorer item, if the left menu is not displayed automatically, click Organize> Folders and Search Options and ensure both ‘Navigation pane’ tick boxes
are ticked. If these boxes are not ticked, your Windows Explorer window will resemble the screenshot below on the left (rather than the screenshot on the right).

Once you have made these changes, the drives will then be visible in the left hand column, (right screenshot).

When conducting searches or navigating to folders in Records Explorer, the options in the left hand pane can be expanded or collapsed. The core menu items are always visible if you scroll up and down, whilst the right hand side will only display your search results and the contents of folders etc.

2.2 NAVIGATION AND SEARCH OPTIONS

When the Records Explorer database is open, two search buttons will display in the top menu bar in addition to navigation options, which will be displayed in both the right and left hand panes.

Records Explorer navigation options / menu:

<table>
<thead>
<tr>
<th>Menu</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Documents Checked Out</td>
<td>Displays the contents of your HP Records Manager Documents Checked Out Tray, i.e., documents currently checked out to you.</td>
</tr>
</tbody>
</table>
Due/In Tray: Displays the contents of your HP Records Manager in Tray i.e items assigned to you.

Favourite Classifications: A list of classifications that you have saved. Right click > Add to Favourites.

Favourite Locations: A list of locations that you have saved. Right click > Add to Favourites.

Favourite Records: A list of records that you have saved. Right click > Add to Favourites.

Favourite Searches: A list of searches that you have saved by Right click > Add to Favourites.

Locations: A list of all locations (including internal) within HP Records Manager.

My Containers: Displays containers you have recently accessed or created.

Personal Searches: Displays Saved Searches to which only you (and the HP Records Manager Administrators) have access.

Recent Documents: Displays the documents you have recently registered or edited.

Search Results: Displays the results of your last search.

Shared Searches: Displays saved searches to which you have access.

Tagged Records: Displays the records you have tagged using Records Explorer, Right Click > Tag Selected Records.

Work Tray: Displays the records you have dragged into the Work tray to work on.

For the majority of users these items will be empty when first using the system. They can be customised as you begin using the system. The names of any paper files that you have in your possession will appear in the In Tray and some Shared Searches may have been created on your behalf by Records Management Services.

2.3 DETAILS VIEW

As in Windows Explorer, the display for folders can be set to Thumbnails, Tile, Icons, List, or Details.

**Records Management Services recommends the Details display.** The Details display places the information in the right hand pane into columns allowing more information about the records to be immediately apparent. The columns can be sorted into ascending or descending order by Name, Assignee and Type etc.

In the example below the search results are sorted by Number (i.e. the TRIM Record Number):

<table>
<thead>
<tr>
<th>Name</th>
<th>Checked Out</th>
<th>Realised</th>
<th>Number</th>
<th>Type</th>
<th>Date Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test file created by</td>
<td></td>
<td></td>
<td>123-386</td>
<td>Electronic Folder</td>
<td>2/07/2015 12:34:55 PM</td>
</tr>
<tr>
<td>Practicum Record -</td>
<td></td>
<td></td>
<td>110-1428</td>
<td>Electronic Folder</td>
<td>10/09/2010 3:41:14 PM</td>
</tr>
</tbody>
</table>

2.4 SHOW FULL PATH IN THE ADDRESS BAR
If the Windows Explorer option “Show full path in the address bar” is selected in the Windows Explorer “Folder Options”, the location of the folder that you are inside will display in the address bar. You can use this as a safeguard to know which folder you are in if you have a folder structure where the top level folder is unique but all the subfolders are a uniform for each matter.

2.5 HIGHLIGHTING MULTIPLE ITEMS IN RECORDS EXPLORER

Some functions outlined in this guide require multiple records to be highlighted.

2.5.1 ADJACENT RECORDS

Locate the required list of documents (see Section 3: Searching or Section 6: Navigation)

Click on the first document required. Hold down the Shift key and click on the bottom document required.

Click over the highlighted documents holding down the left mouse button to drag the items. Or right click over the highlighted documents to perform functions such as Tagging the records (see Section 6)

2.5.2 NON-ADJACENT RECORDS

Click on the one of the documents that you require. Hold down the CTRL key and click on the other documents that you require one-by-one.
You can now click over a highlighted document holding down the left mouse button to drag the items, or right click over the highlighted documents to perform functions such as Tagging the records (see Section 6).

2.6 DESKTOP SHORTCUTS

Desktop shortcuts can be made of any Records Explorer menu items, Tags, Electronic Folders, Sub Folders or Documents. Simply drag and drop to the desktop.

To open the item, double click on it. Windows Explorer will open and display the location where the item existed when you created the shortcut. The left hand pane will not open automatically when opening Records Explorer from a shortcut so click “Folders” to display the left hand pane, as outlined in Section 2.1.

When double clicking a desktop shortcut of a Document the Profile Screen will be displayed (see Section 7.1). Select the option that you require (e.g. View or Edit) and the document will open into its native application.

2.7 OPENING NON-STANDARD DOCUMENT APPLICATIONS WITH THE TRIM DOCUMENT VIEWER

Some non-standard document types such as Visio charts or CAD drawings will launch into the TRIM Document Viewer. The TRIM Document Viewer will only show if the document is non-standard document or if you do not have the native application installed on your desktop – this allows you to still view the document without having to install the software.

Select View > File > Launch to launch the document into its native application. This will only work if you have the relevant application installed on your machine. You cannot open a Visio chart if Visio is not installed on your machine, for instance.