



THE UNIVERSITY OF
SYDNEY

Records Explorer MANUAL

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ARCHIVES & RECORDS MANAGEMENT SERVICES

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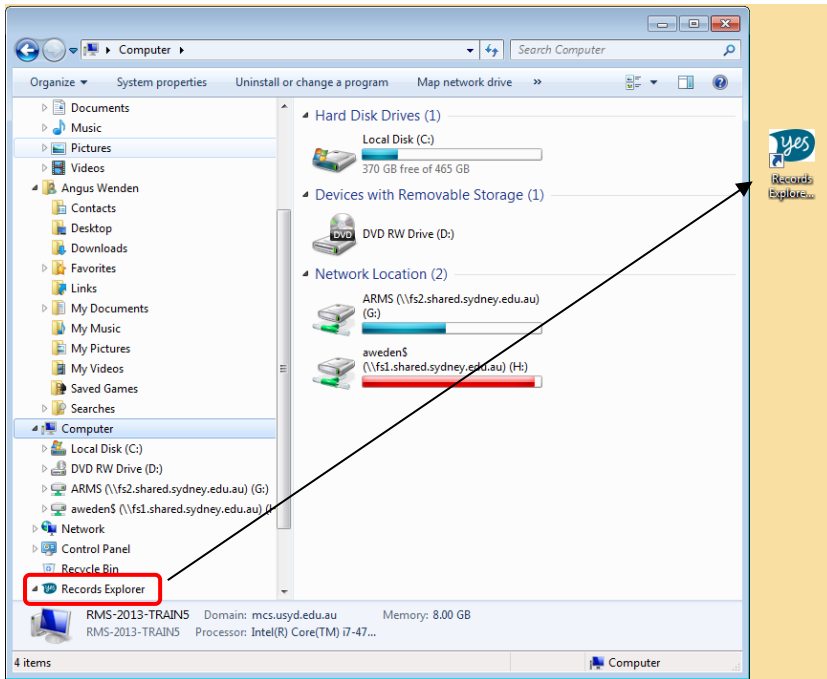
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1 ACCESSING THE APPLICATION

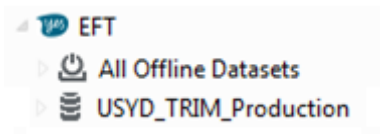
Open **My Computer**. Records Explorer will display under your network drives.

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.

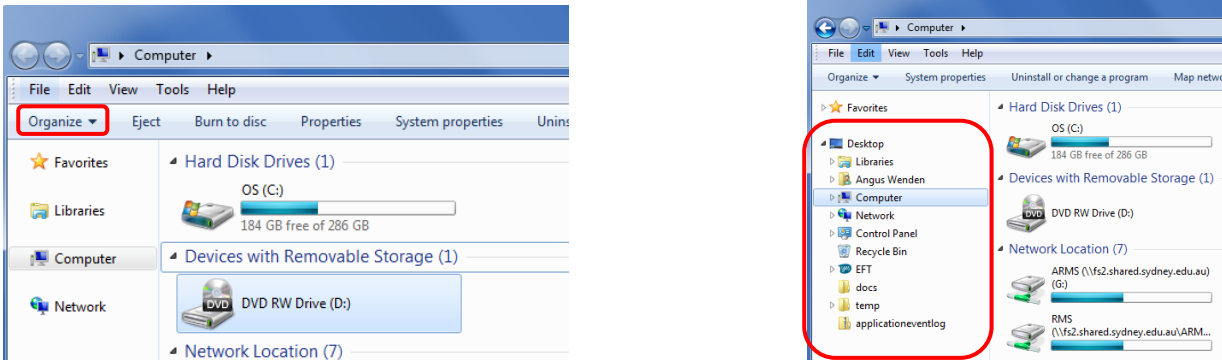
2 DISPLAY

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).

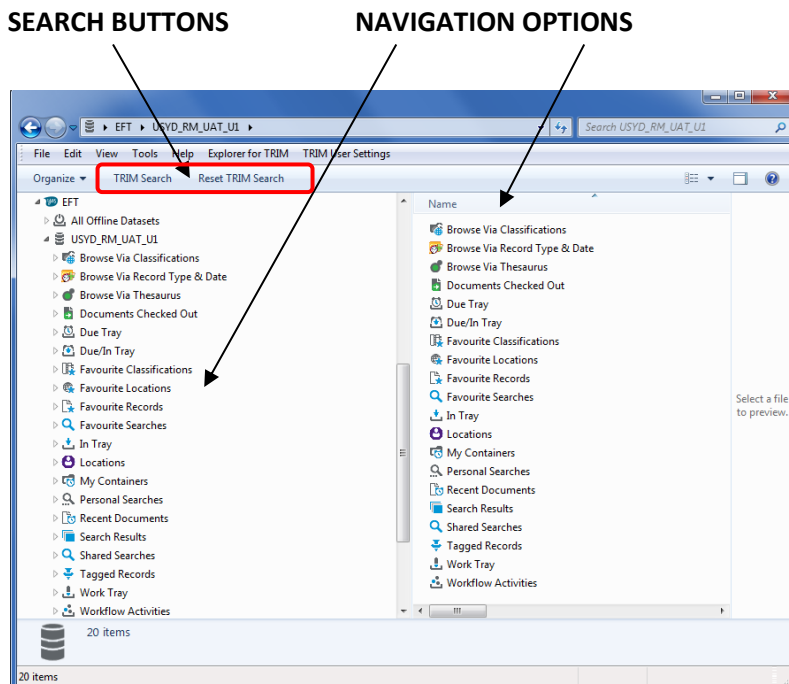


Once you have made these changes, the drives will then be visible in the left hand column, (right screenshot).

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 display in both the right and left hand panes.



Records Explorer navigation options / menu:

Menu	Description
Documents Checked Out	Documents Checked Out: Displays the contents of your HP Records Manager Documents Checked Out Tray i.e documents currently checked out to you.
Due Tray	

	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 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.

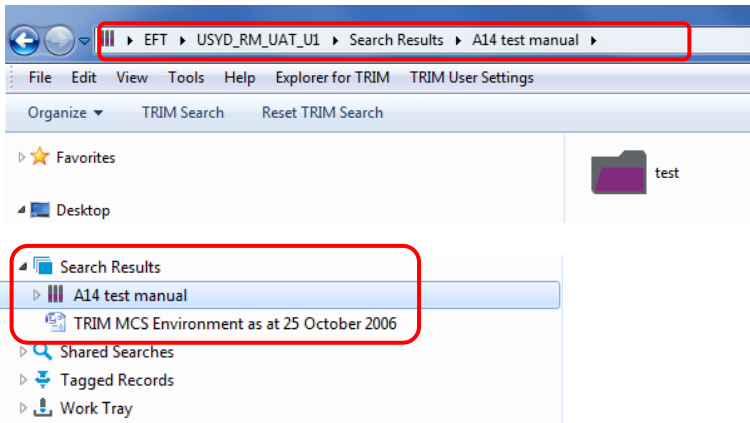
Records Management Services recommends the Details display. The Details display places the information in the right hand pane into columns allowing more information about the records to be immediately apparent. The columns can be sorted into ascending or descending order by Name, Assignee and Type etc.

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

Name	Checked Out	Finalised	Number	Type	Date Created
test file created by ...			E15-386	Electronic Folder	2/07/2015 12:54:55 PM
TEST FILE			E11-690	Electronic Folder	8/04/2011 9:33:29 AM
Library Enquiries 20...			E11-108	Electronic Folder	20/01/2011 9:51:47 AM
Practicum Record -...			E10-1428	Electronic Folder	10/09/2010 3:41:14 PM

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.



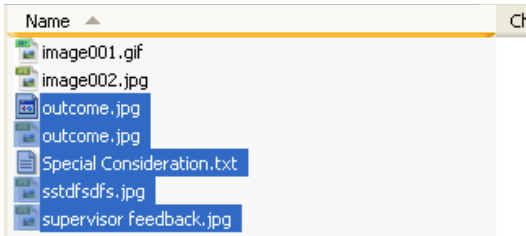
2.5 HIGHLIGHTING MULTIPLE ITEMS IN RECORDS EXPLORER

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**)

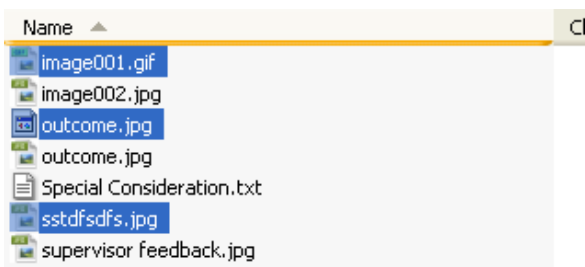
Click on the first document required. Hold down the **Shift** key and click on the bottom document required.



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.

