



THE UNIVERSITY OF
SYDNEY

Records Explorer MANUAL

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ARCHIVES & RECORDS MANAGEMENT SERVICES

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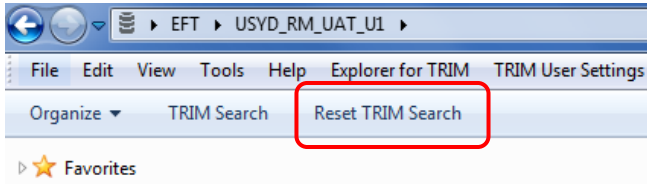
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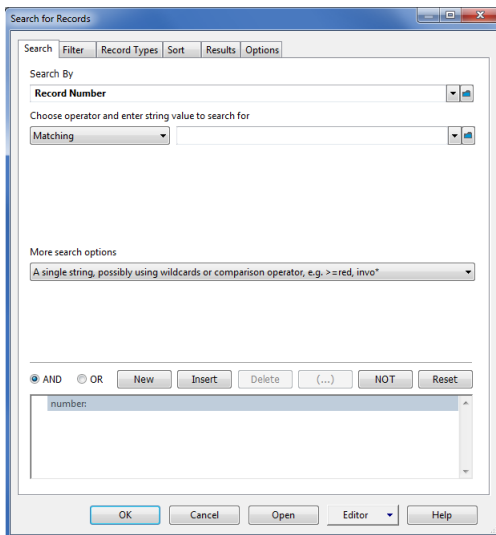
3 SEARCHING

3.1 INITIATING A NEW SEARCH USING THE “RESET TRIM SEARCH” BUTTON

The **Reset TRIM Search** button in the menu bar will always result in a clean search being initiated (i.e. it will not inherit any filters set during a previous search): Click the **Reset TRIM Search** button.



The **Search for Records** dialogue box will then pop up:



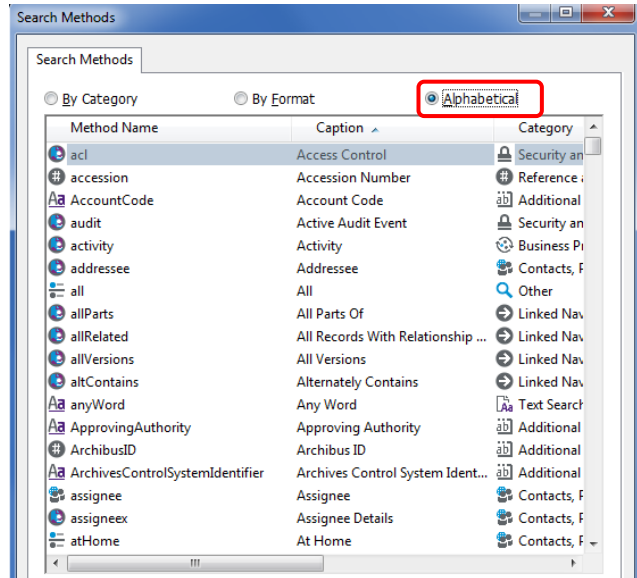
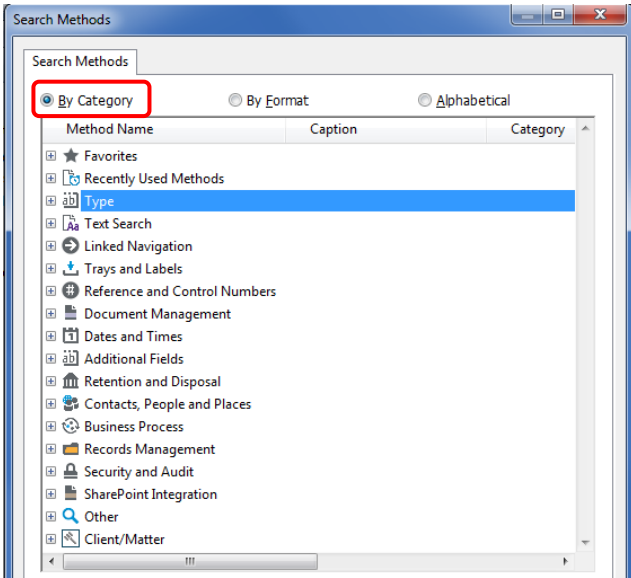
3.2 SEARCH TAB

In the **Search** tab select the type of search method required and enter the relevant text. Common search methods include Title Word, Record Number, Creator, and Date Created.

Click the blue folder to the extreme right of the **Search By** field:



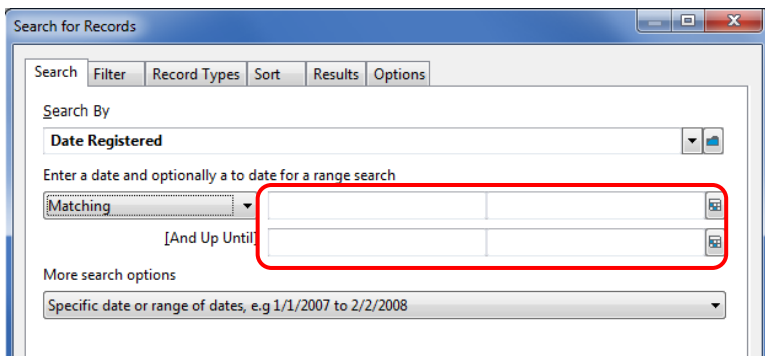
A dialogue box called **Search Methods** will pop up. The search methods can be displayed in categories (“Categorised”) or as a single alphabetical list (“Details”):



If using the categorised display, expand each category using the +

Select the desired search method. Click **OK**.

This will return you to the **Search For Records** screen. Enter the required text in the **Equal To** field:



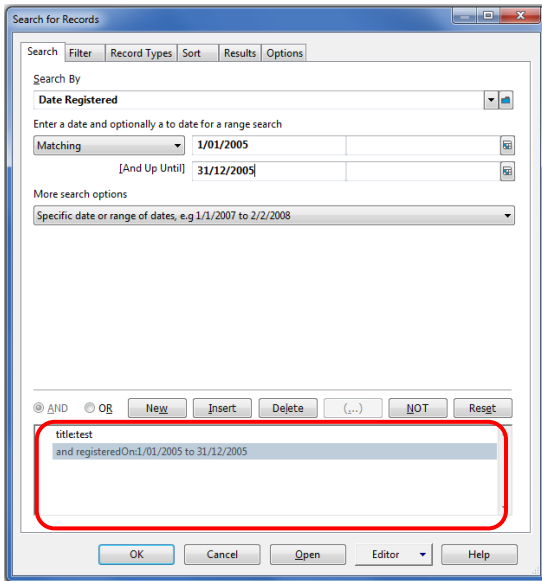
Click **OK**

NB - If the Equal To field is left blank you cannot run a search – even if you have used the Filter tab to set parameters for your search.

After a search method has been used once it will then display in the drop down list in the **Search By** field (to the left of the blue folder icon).

3.3 BOOLEAN SEARCHING

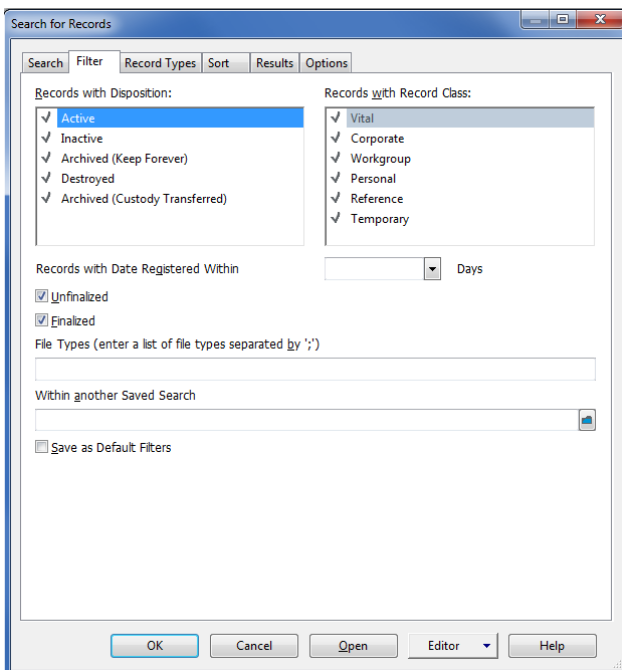
Multiple search terms can be set by selecting **New** in the “Current Selection” section of the **Search For Records** dialogue box. Boolean searches work on the **And, OR, Not** principle. E.g. Creator “Bloggs, Joe”, **and** Title Word “Madsen” etc.



3.4 SORT TAB

Currently the **Sort** tab does not affect the search results. Do not use the sorting facility here – run the search, and sort the results by clicking on the appropriate column headings.

3.5



FILTER TAB

The **Filter** tab allows the search to be refined to only return results of a certain Record Type, Status or Disposition.

Under **Disposition** uncheck the relevant checkboxes to search for records that are Inactive, Destroyed or Archived

Search for finalised or unfinalised documents by selecting the relevant **Finalised Filters**

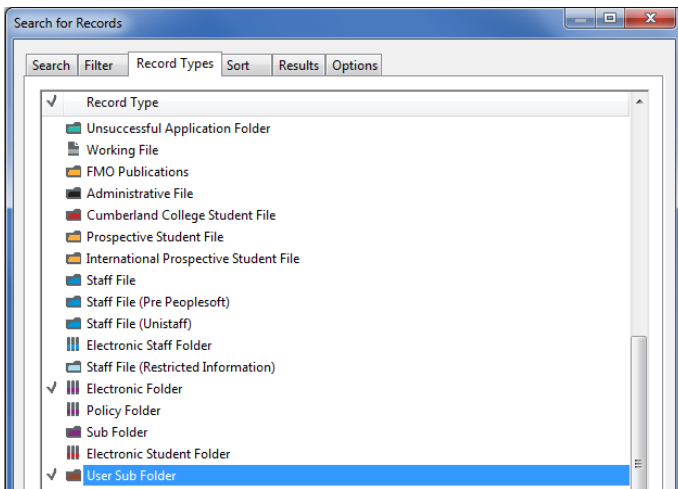
In the **Date Registered Filter** You can select broad date ranges to search within. If you need to set specific dates, use the Date Registered search option in the Search tab.

Under File Types you can type document extensions to narrow the results to a particular document type. E.g. **.pdf** **.docx** etc

3.6 RECORD TYPES TAB

Search for specific record types by right clicking and selecting **Untag All** under the **Record Types** section.

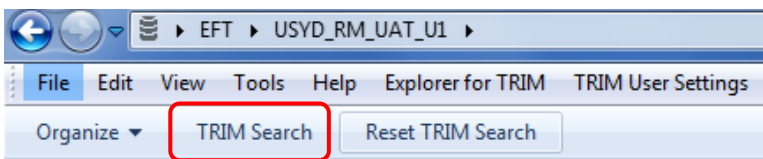
Then, tick the record types that you do wish to search on by clicking in the white space to the left of the record type name – e.g. Electronic Folder, Document, Sub Folder. A tick will be placed next to the selected record type:



If you have not populated the **Search** tab please ensure that you do so before clicking **OK**.

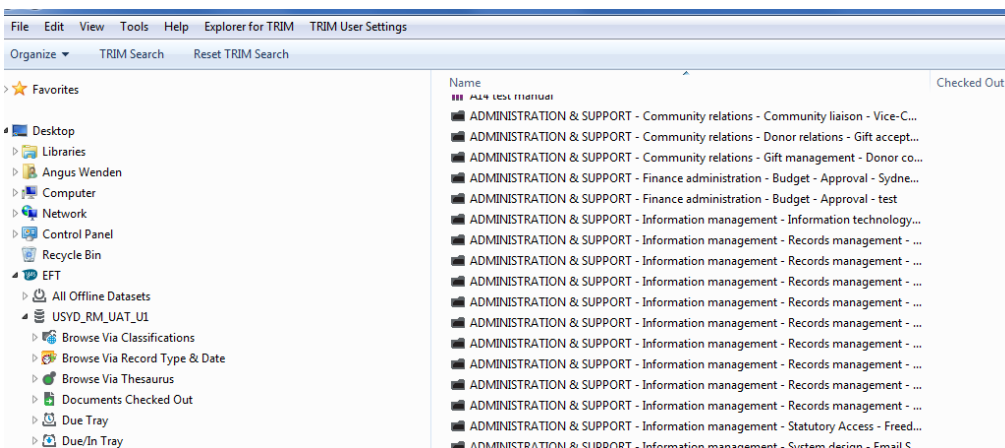
3.6 MODIFYING A SEARCH USING “TRIM SEARCH” BUTTON

To correct a typo or to change some of the search parameters, select **TRIM Search** from the top menu bar – this will retain all of the criteria set in the previous search – including Boolean search terms and filters. Simply edit required fields and click OK to run the search again.

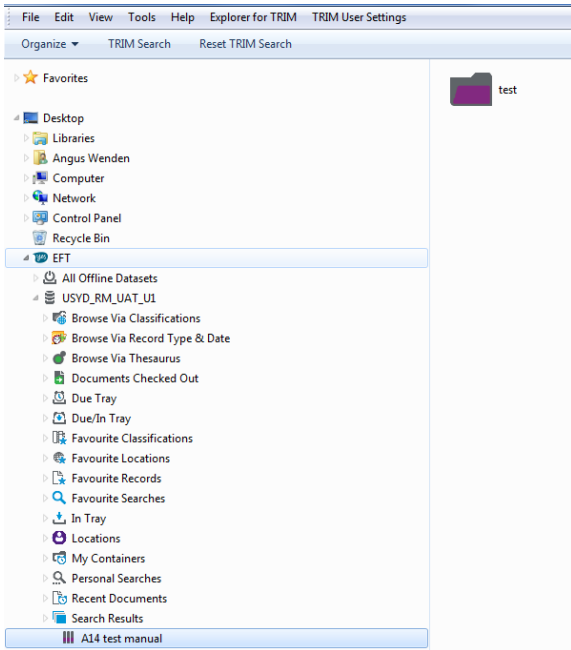


3.7 SEARCH RESULTS DISPLAY

The search results will display in the right hand side of the screen.



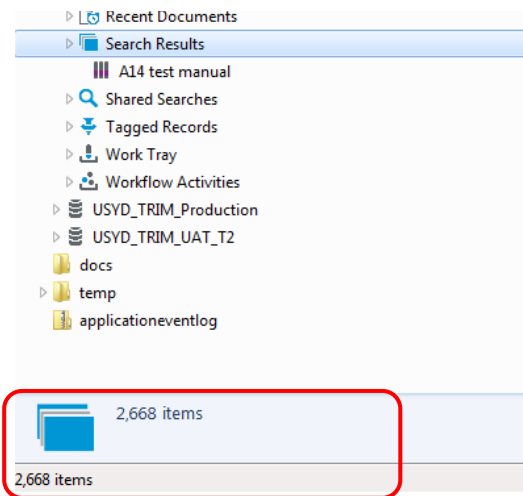
To view the contents of a folder **double click** on the folder name. The Sub Folders or Documents will be displayed in the right hand pane. When opening a folder from the search results it will then list under the New Search button in Favourite Searches on the left, whilst the folder contents are displayed on the right.



3.8 SEARCH PROGRESS AND COUNT

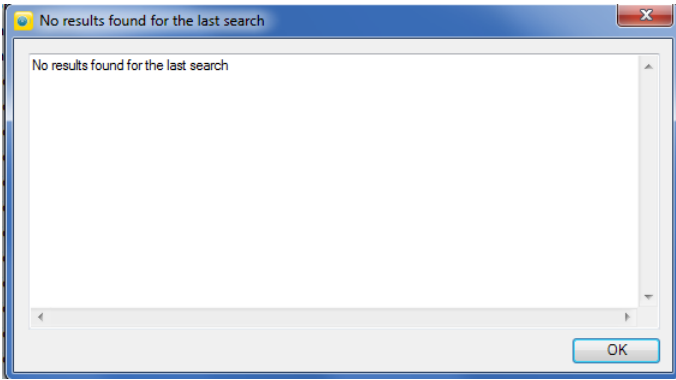
Search results do not display until all of the relevant records have been retrieved. While the search is in progress you can see the result count accumulating in the bottom left of the screen.

A final **count** of the number of records retrieved will then display:



3.9 NO SEARCH RESULTS

If there are no search results the following message will be displayed.



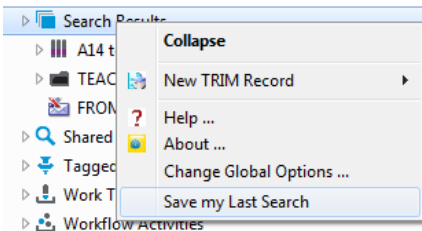
Use the **TRIM Search** button (See **Section 3.6**) to modify the search criteria.

3.10 PERSONAL SEARCHES

After running a search you are able to then save that search criteria under **Personal Searches**. Saving a search allows you to re-run a complex search at a later date without having to recreate all of the relevant criteria. Personal Searches will only be saved to your login.

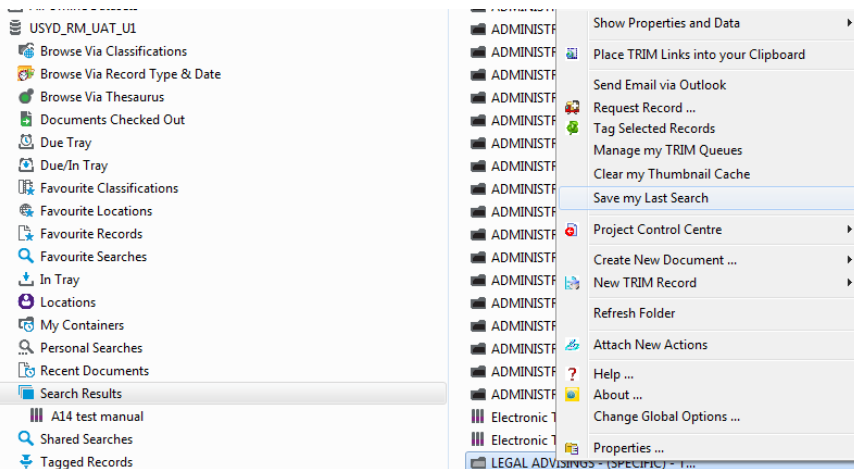
After performing a search, expand **Personal Searches** to show the “New Search” option.

Right click over **Search Results** and select **Save my Last Search**:

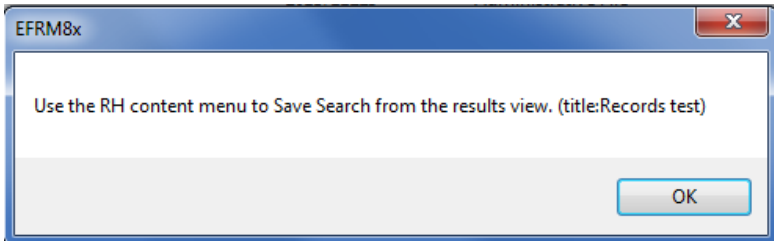


The **Select From Records** dialogue will appear, listing your search results in a TRIM search screen.

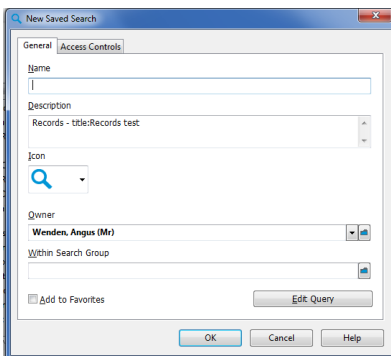
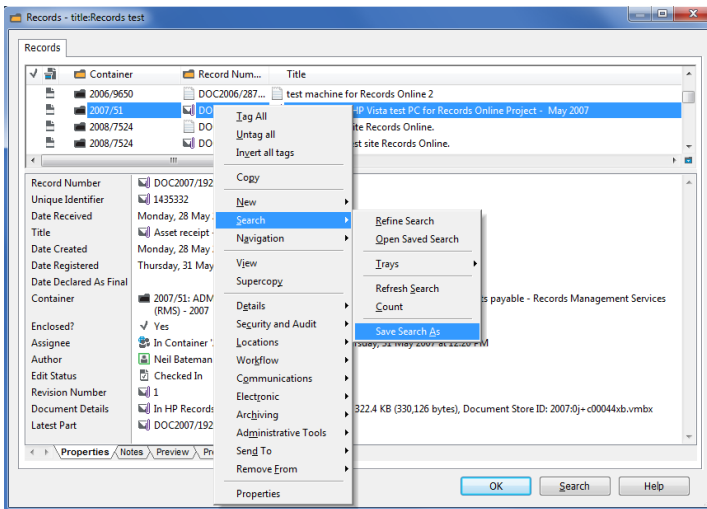
Right Click over one of the documents listed in the upper pane. Select **Search > Save Search As:**



The following window will open, click **ok**.



The following window will open, **Right Click > Search > Save Search As.**



The **New Saved Search** dialogue box will appear:

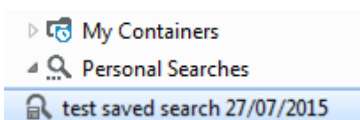
Name: Type a title for the search so that you will recognise it later. Records Management Services recommends including an agreed **acronym** for your department as a prefix for the saved search name.

Description summarizes the search criteria

Owner will list the logged in users name.

Edit Query returns you to the **Search For Records** dialogue box to modify your search criteria before saving the search.

The search will now be displayed under **Personal Searches**:

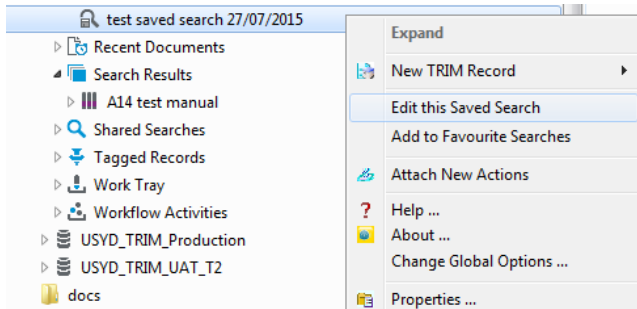


To run a saved search, click on the search name. The **Search For Records** dialogue box will pop up. Click **OK** without making any modifications.

3.11 MODIFYING A PERSONAL SEARCH

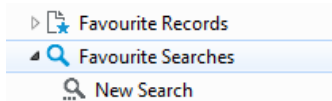
To modify the search criteria at a later date, right click on the search name and select **Edit this Search**:

A dialogue box similar to the **New Saved Search** screen will open where you can use the Search, Filter and Access Controls tabs to modify the search criteria.



3.12 “NEW SEARCH” IN PERSONAL SEARCHES/FAVOURITE SEARCHES

By expanding Favourite Searches or Personal Searches in the left hand list options you will find that there is a **New Search** button. This is the same as the **TRIM Search** button i.e. it will inherit all the values of your most recent search including any filters that you set. If you require a fresh search use the **Reset TRIM Search** button on the menu bar.



3.13 SHARED SEARCHES

A Shared Search is a saved search that has been opened up for other people to view. You can share it with one other person, a whole department or any combination of people/departments provided they are registered Records Online users.

The search criteria will be the same for everyone – however, the results may vary from person to person depending on their access rights. Please bear this in mind if you are unable to view files that one of your colleagues can see. If you think that you should be able to view a file and you cannot, please notify Records Online to review your access rights.

To create a Shared Search run the search and follow the same steps as outlined in **Personal Searches**. Then email records.online@sydney.edu.au with the exact name of the saved search and the names of the users requiring access to the saved search, the Helpdesk will update the access controls and send you through an email notification to let you know the shared search is now available. Please then communicate this to the rest of the users in the access group.