



THE UNIVERSITY OF
SYDNEY

Records Explorer MANUAL

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ARCHIVES & RECORDS MANAGEMENT SERVICES

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CONTENTS

4 FOLDER CREATION..... 2

4.1 Electronic Folders..... 2

4.1.1 MODIFYING ACCESS CONTROLS..... 2

4.2 Electronic Sub folders and User Sub Folders 5

4.3 Creating Folder Structures using “Copy Tree” Feature 5

4.3.1 Set Up Step 1: Activate the “Power User Tree” 6

4.3.2 Set Up Step 2: Save “Favourite Classification” 7

4.3.3 Set Up Step 3: Save an existing folder into Favourites to act as a Template 8

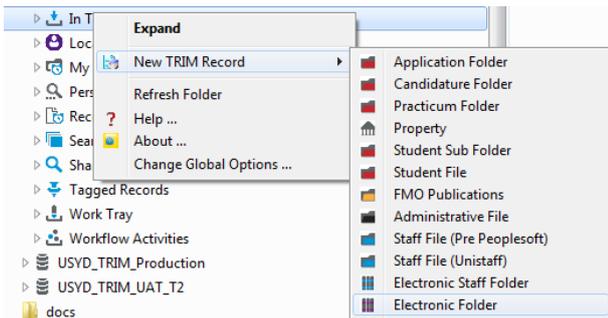
4.3.4 create a New Folder 8

4 FOLDER CREATION

TRIM allows users to create folder structures of three levels. For recordkeeping purposes, each of these levels has its own “Record Type”. Sub folders are subordinate to the Electronic Folder and cannot be created as a free folder – a sub folder must be contained within an Electronic Folder or else you will not be able to create it. When creating a new record for a new matter always start with an Electronic Folder and work down.

4.1 ELECTRONIC FOLDERS

To create a new Electronic Folder right click over the **In Tray** menu item in the left pane. Select **New TRIM Record > Electronic Folder**. NB - you will only see Record Types in the list that you have access to use:



A “**New Record**” entry form will appear. Mandatory fields are indicated by the red stars(*):

Title: * Descriptive title of item. This portion of the title will be returned in “Title Word” and “Notes Word” searches

Classification: Summary of the business process being covered by the documents inside. Often Access Controls and Retention Schedules are linked the Classification. Navigate using the blue Look-up icon.

Owner: * Business unit in charge of the matter the Electronic Folder covers

Assignee: * Individual in charge of the matter the Electronic Folder covers – not all business units use this. Generally this is used when a folder relates to a Project that is run by a single staff member.

Retention Schedule: Code indicating the length of time the folder must be retained for.

Initiate Workflow From: This feature is not currently active.

 A screenshot of the 'New Electronic Folder' dialog box. It has three tabs: 'General', 'Update Security and Access Policy', and 'Additional Fields'. The 'General' tab is active. Fields include:

- Title (Free Text Part) with a red asterisk and a search icon.
- Classification with a search icon.
- Owner with a red asterisk and a dropdown menu showing '[The University of Sydney]'.
- Assignee with a red asterisk and a dropdown menu showing '<At Home>[Electronic]'.
- Retention Schedule with a dropdown menu.
- Initiate Workflow from with a dropdown menu.

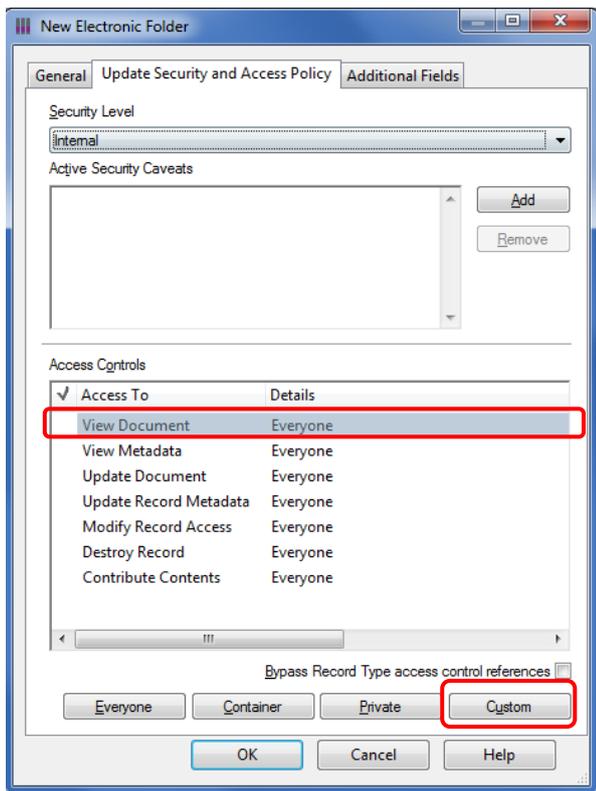
 At the bottom are 'OK', 'Cancel', and 'Help' buttons.

4.1.1 MODIFYING ACCESS CONTROLS

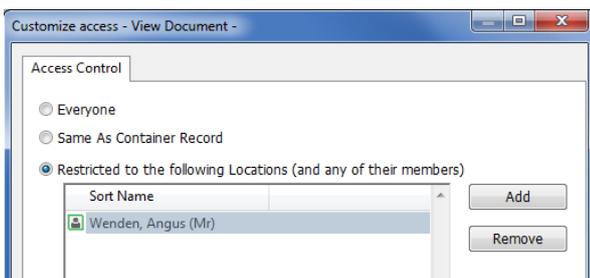
It is recommended that Access Controls are added to the Electronic Folder so that the folder can only be viewed by relevant personnel. Only users within the Access Group will be able to see the folder and its contents. All Sub Folders and documents within the Electronic Folder will inherit these Access Controls though they can be modified after creation to restrict or open certain sub folders to a different audience.

After completing the details in the **General** tab, click the **Update Security and Access Policy** tab.

In the **Access Controls** pane at the bottom highlight **View Metadata**, and then click **Custom** in the bottom right:



In the **Customise Access – View Metadata** dialogue box:

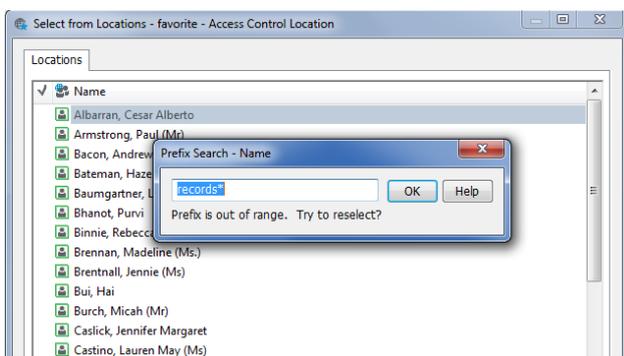


Select **Restricted to the following Locations (and any of their members)**.

Highlight your own name in the **Sort Name** field and select **Remove**.

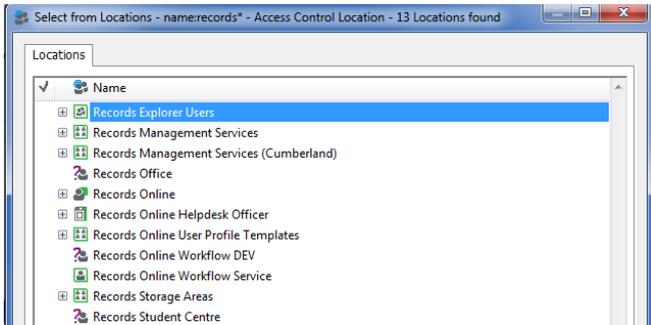
Then select **Add**.

A list of all locations will appear.



Simply start typing the name of the business unit, or individual's surname, the **Prefix Search – Name** dialogue box will appear with your text inserted, place an asterisk (*) at the end of the word and hit **Enter/Click OK**.

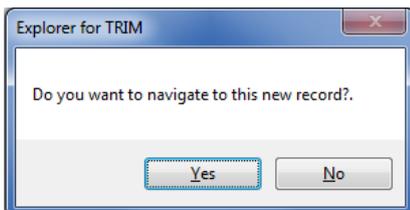
All locations that begin with that word will appear in a list. Select the relevant location and click **OK**.



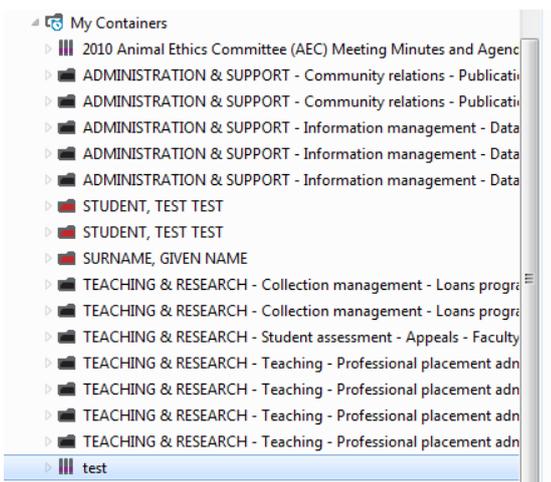
This will return you to the **Customise Access – View Metadata** dialogue box. Repeat this step if more users or business units are required to have access. Click **OK**.

You are now back in the **New Electronic Folder** dialogue box. Click **OK**.

Upon creation a dialogue box will pop up:



Selecting **Yes** will then expand the **My Containers** menu item in the left pane and the new folder will be listed alphabetically. It will be highlighted.

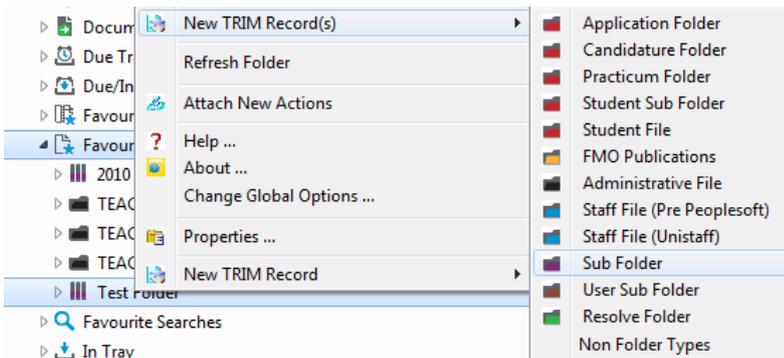


Double click on the folder to open it and begin adding documents (see **Sections 5**), or to add Sub Folders (see **Section 4.2**)

If Records Online Helpdesk normally populate the Sub Folders and User Sub Folders for you, continue creating all of the Electronic Folders you need then send an email to records.online@sydney.edu.au asking for the sub folders to be populated for all Electronic Folders created by yourself and the date of creation.

4.2 ELECTRONIC SUB FOLDERS AND USER SUB FOLDERS

To create a **Sub Folder** within an existing Electronic Folder, open the existing folder, or highlight it, and right click > **New TRIM Record** > **Sub Folder**



The **New Record** entry form will pop up:

 A screenshot of the 'New Sub Folder' dialog box. The 'General' tab is active. The 'Title (Free Text Part)' field is empty. The 'Container' field is set to 'E15-407'. The 'Assignee' field is set to '<At Home>E15-407'. The 'Owner' field is set to '[The University of Sydney]'. The 'Home' field is set to '<In Container>E15-407'. The 'Retention Schedule' field is empty. There is a checkbox for 'Enclosed?' which is checked. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

Generally, just complete the **Title (Free Text Part)** field and click **Ok**. Most other fields are inherited directly from the parent container – i.e. the Electronic Folder – and cannot be modified.

A different **Retention Schedule** can be applied to the Sub Folder. Sub Folders may need to be kept for different lengths of time. Refer to the folder structure outlined by Records Management Services and your department.

Creating a **User Sub folder** is performed in exactly the same way as above. The User Sub Folder is the third and final level in the TRIM folder structure.

4.3 CREATING FOLDER STRUCTURES USING “COPY TREE” FEATURE

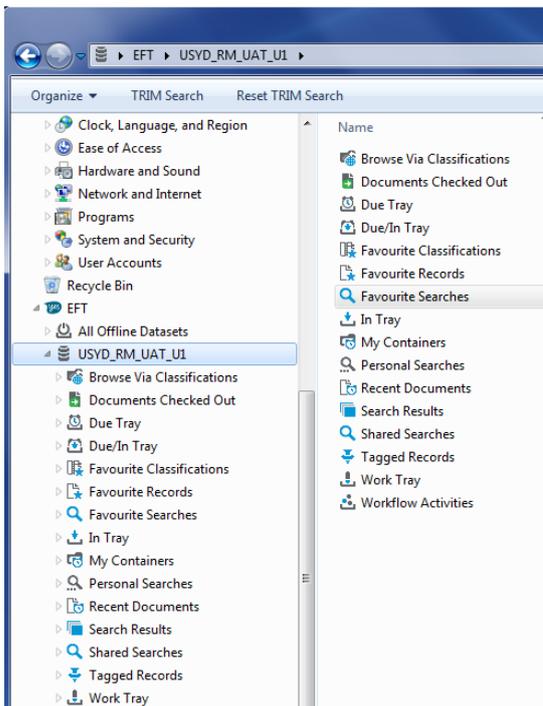
A New Electronic Folder complete with the sub folder structure can be generated by Copying an existing folder. The structure is then Pasted on to the relevant Classification Node. (Generally RMS will have prescribed this Classification to your team as part of Records Explorer training.)

RMS recommends that you follow these 3 steps upon first for the best experience:

4.3.1 SET UP STEP 1: ACTIVATE THE “POWER USER TREE”

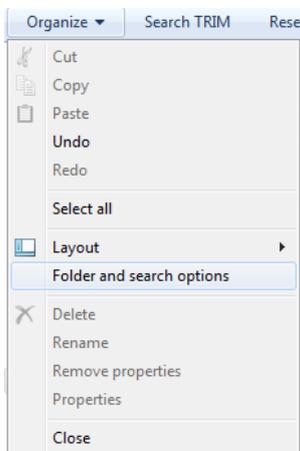
In the Menu Bar, select **TRIM User Settings > Activate Power User Tree View:**

If when opening Records Explorer you are presented with the following view (i.e. No **TRIM User Settings**)

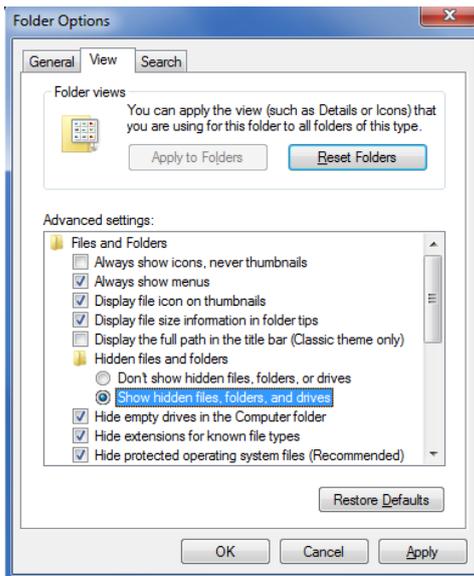


To fix this simply click on **Organize** at the top of the page

Open Folder and search options

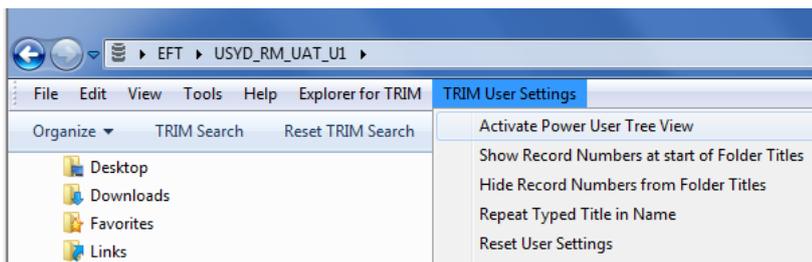


Open the **View Tab** - Tick **Always show menus** – Click **Apply & OK**.



This will show the top menu bar

In the Menu Bar, select **TRIM User Settings > Activate Power User Tree View:**



Press **F5** to refresh the screen.

The menu should change showing more menu items than previously – in particular you need to see “Browse Via Classifications” and “Favourite Classifications”.

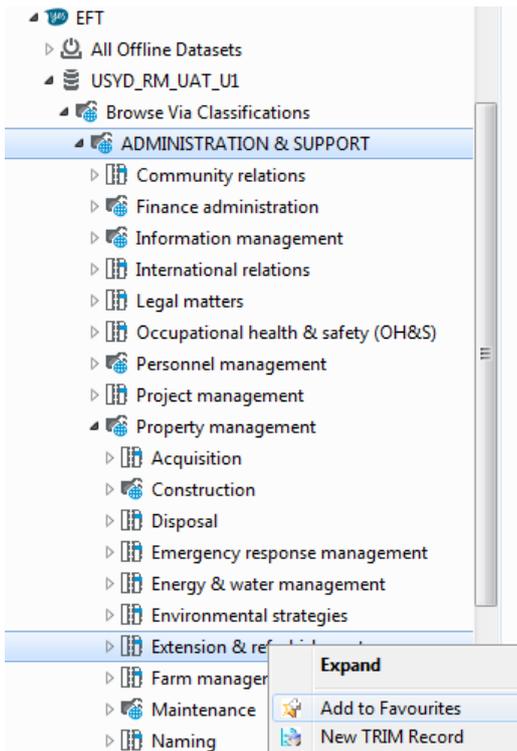
If the menu does not refresh, try closing Records Explorer and re-opening.

4.3.2 SET UP STEP 2: SAVE “FAVOURITE CLASSIFICATION”

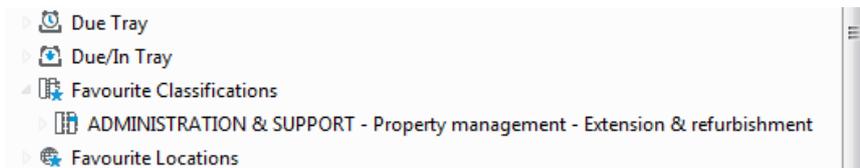
In the left-hand pane, click on the **Browse Via Classification** menu option.

Navigate through the Classification Tree to the Classification used for your departments Folder Structure e.g. **Administration & Support – Property Management – Extension & Refurbishment**

When you see the final tier of the Classification you need (in this example “Extension & Refurbishment”) **Right Click** on it > **Add to Favourites:**



The Classification will now show in **Favourite Classifications** as a shortcut



TIP: Left Click will reveal all Administrative Files and Electronic Folder that have been created under this Classification – this may be a vast number of records and could take a long time to extract). Avoid left clicking on the last tier of a classification if at all possible

4.3.3 SET UP STEP 3: SAVE AN EXISTING FOLDER INTO FAVOURITES TO ACT AS A TEMPLATE

Locate an Electronic Folder that has the Folder Structure required for your department's files – Try your **In Tray** or **My Containers**, or else conduct a TRIM Search. Right Click on the Folder > **Add to Favourites**.

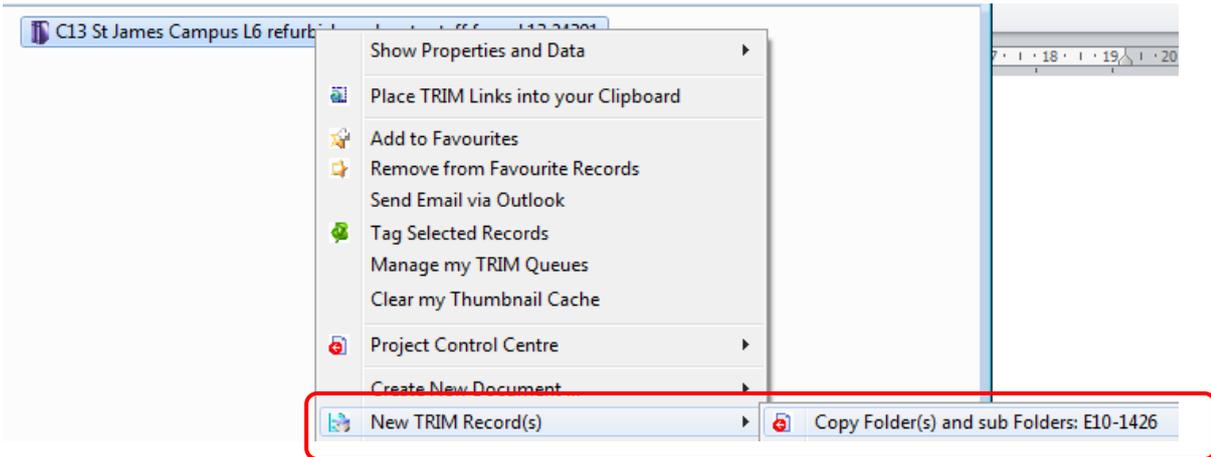
If you wish to make a proper template folder rather than just copying an existing folder that is in use, this is possible.

You can create a template yourself using the copy tree feature. Otherwise, ask Records Online Helpdesk to create one. They will send you the Record Number to allow you to search for the record. Supply the Record Number of the template folder to any of your colleagues who do Folder Creation so that there is only one template in use.

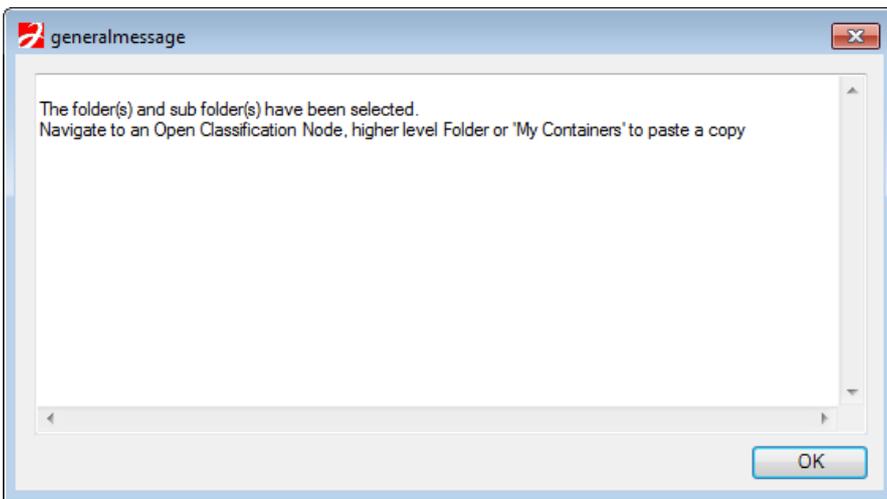
4.3.4 CREATE A NEW FOLDER

Go to **Favourite Records** to see the Template Folder (as saved at step 4.3.3 above)

Right Click on the Folder > **New TRIM Record** > **Copy Folder (s) and Sub Folders: [Record Number]**

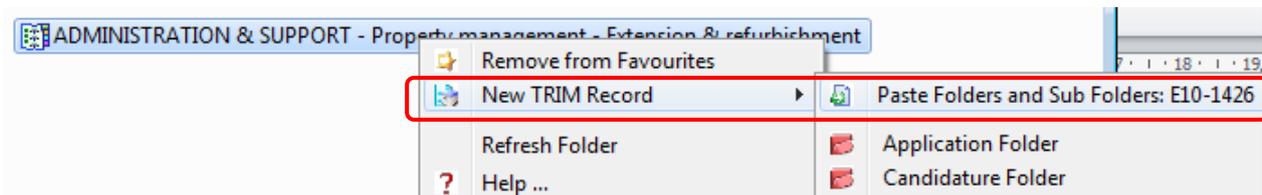


A confirmation message will appear, Click **OK**:



Go to **Favourite Classifications**.

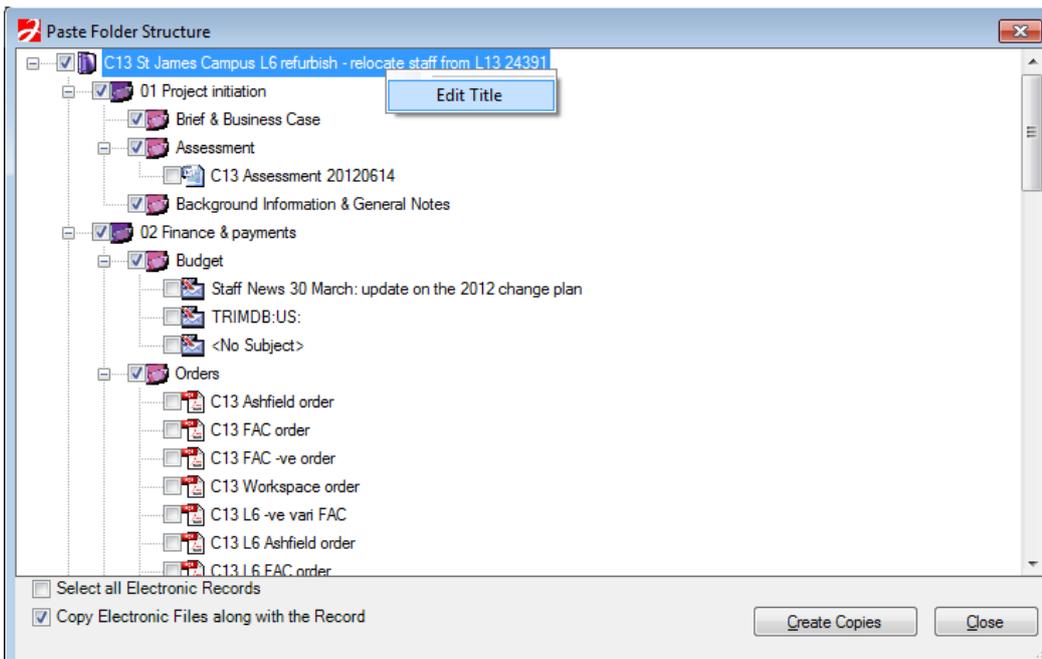
Right Click on the saved **Classification** (as per step 4.3.1 above) > **New TRIM Record** > **Paste Folders and Sub Folders: [Record Number]**



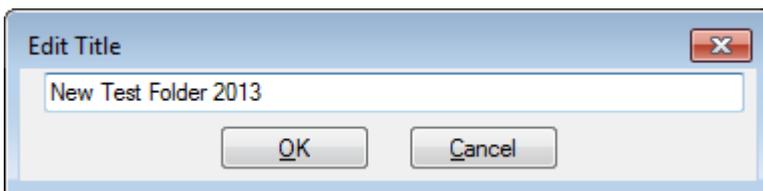
A **Paste Folder Structure** dialogue box will pop up showing all Folders, Sub Folders, User Sub Folders and Documents from the Template folder.

NB - By default, the Copy Tree feature selects all Folders, Sub Folders and User Subfolders for copying, but leaves all documents unselected. If you wish to copy documents as well, either place a tick next to specific documents that you require or to copy all documents click the "Select All Electronic Records option" at the bottom of screen.

Scroll to the top of the dialogue box to see the Folder Title. **Right Click** on it > **Edit Title**



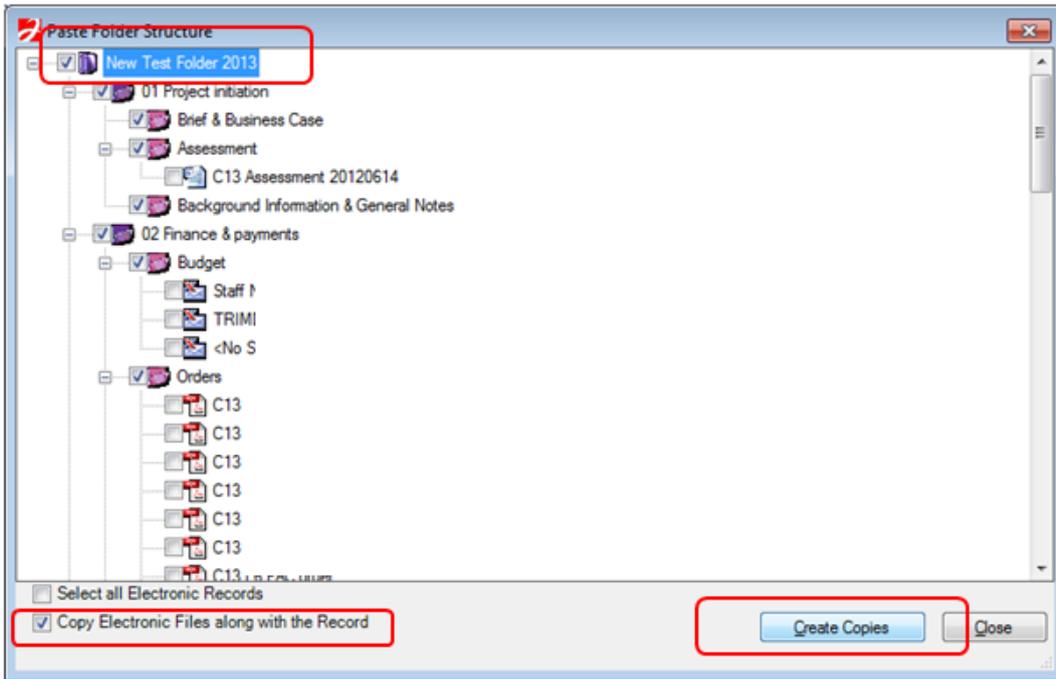
A small dialogue box **Edit Title** will pop up. Type the new Folder title over the top of the original folder's title, Click **OK**:



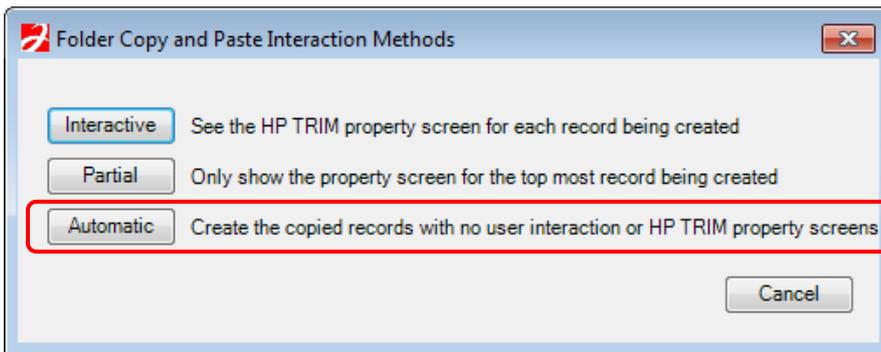
The **Edit Title** dialogue box will close and the Title of the record in the **Paste Folder Structure** screen will update.

Ensure that **Copy Electronic Files along with the Record** (at the bottom of the dialogue box) is selected.

Click **Create Copies**



In the **Folder Copy and Paste Interaction Methods**, select **Automatic**.

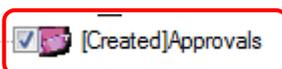


TIP: if you realised at this point that you had forgotten to change the Folder Title, you could select **Partial** and modify the title in the Folder Properties screen. Never select **Interactive** as you will need to OK a multitude of properties screens.

As the tool works, each Folder will have **[Created]** appended to the folder title in the **Paste Folder Structure** screen (this is not in the actual folder title – it is just to show the progress of folder creation).

Scroll to the bottom of the **Paste Folder Structure** Screen.

Once the last Folder says “Created”, simply click **Close** to the **Paste Folder Structure** screen.



The new Folder can be located in **My Containers**.