



THE UNIVERSITY OF  
**SYDNEY**

# Records Explorer MANUAL

**August 2015**

## **ARCHIVES & RECORDS MANAGEMENT SERVICES**

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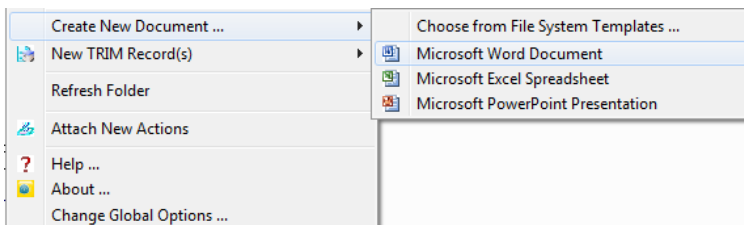
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## 5 NEW DOCUMENT CREATION

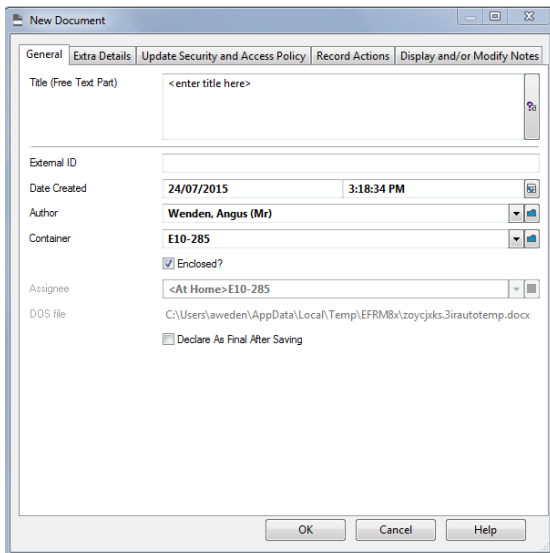
### 5.1 CREATING A NEW BLANK DOCUMENT

Locate the Folder / Sub Folder where you wish to save a new document.

Right Click > **Create New Document** > (Select appropriate document type)



The **New Record Document** dialogue box will appear:



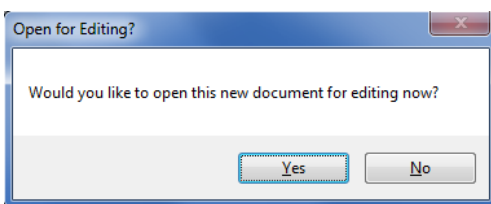
Enter a document title, following naming conventions outlined by your department. **This is mandatory**

Write your surname in the **Author** field then select the blue folder look-up, to pick your name from the list of users with the same surname. This will appear in the drop down list for subsequent records that you create.

The **Container** shows the Record Number of the folder you are placing the document inside. This is mandatory but will auto-populate provided you initiated the New Document creation by right clicking on or inside the desired folder.

Click **OK**.

Then you will receive the following message:



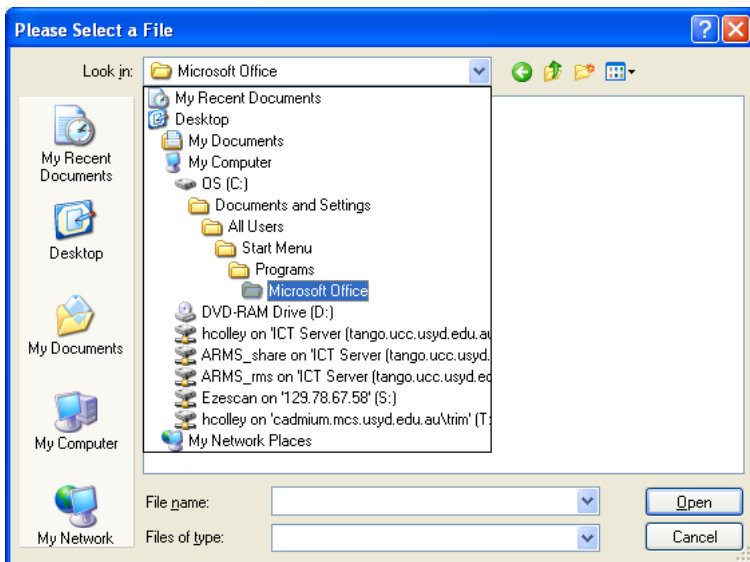
Select **Yes** to launch the blank document/template and begin editing.

If you select **No** and wish to work on the document later, it can be found in the appropriate folder or under **Recent Records**.

## 5.2 CREATING A NEW DOCUMENT USING A TEMPLATE

To create a document using one of your business units templates, right click > **Create New Document > Choose From Office Templates**. In the **Please Select a File** screen, click on My Computer and navigate through your network drives to the stored template.

To locate other Microsoft Office applications navigate through your C:Drive to the following path:



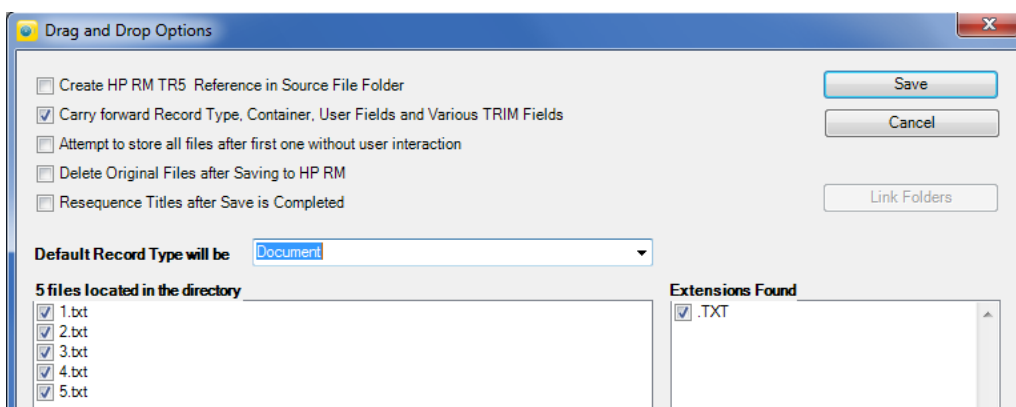
## 5.3 DRAG AND DROP DOCUMENT SAVING

### 5.3.1 DRAG AND DROP MULTIPLE DOCUMENTS

Open your network drive in a new window. Locate the required documents and highlight them using the Shift or Ctrl keys (for further instructions see **Section 2.4**).

Click on the highlighted area, hold down the left mouse button and drag the documents over to the relevant folder in Records Explorer. Release the mouse button.

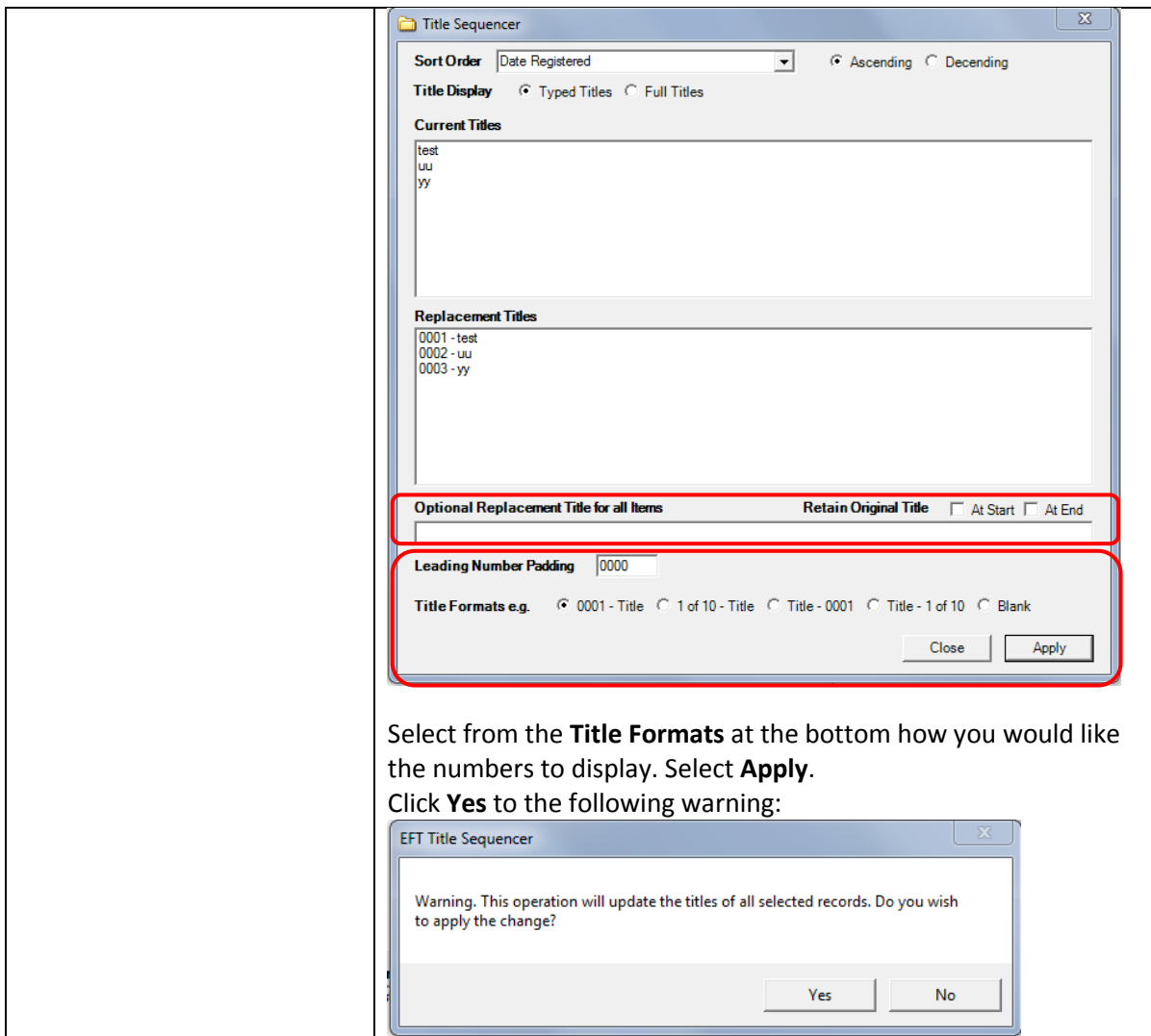
When you release the mouse the following screen will appear:



NB - If the **Default Record Type will be** box is not present please contact Records Online Helpdesk so they can talk you through adding this.

Click in the check boxes to select the desired functions. The **Drag and Drop Options** are defined in the following table:

Option	Description
<b>Create HP TRIM TR5 Reference in Source File Folder</b>	Saves the document to Records Explorer, and leaves a link to the document in the source directory.
<b>Carry forward Record Type, Container, User Fields and Various TRIM Fields</b>	Useful for dragging multiple documents. The Record Type, Container and some other generic fields for the documents in that drag and drop will be copied over. <b>Always leave this option checked.</b>
<b>Attempt to store all files after first one without user interaction</b>	Again, when dragging multiple documents, only one <b>New Record Document</b> form will need to be completed, the others will be uploaded automatically. This feature works in conjunction with the option above.
<b>Delete Original Files after saving to HP TRIM</b>	Original documents from your network drives will be automatically deleted after saving them to Records Explorer.
<b>Re-sequence Titles after Save</b>	<p>When doing a bulk drag and drop of documents, a description can be added to all titles – e.g. if you have 10 photos of the Main Quad that are named IMG0001 though IMG0010, you could append “Main Quad Photos 2011010” to all ten photos. You can also completely replace the original title if desired.</p> <p>A numbering pattern can also be allocated by the Title Sequencer such as “1 of 10, 2 of 10.... 10 of 10” to represent this relationship.</p> <p>After the documents are saved an additional dialogue box will appear:</p>

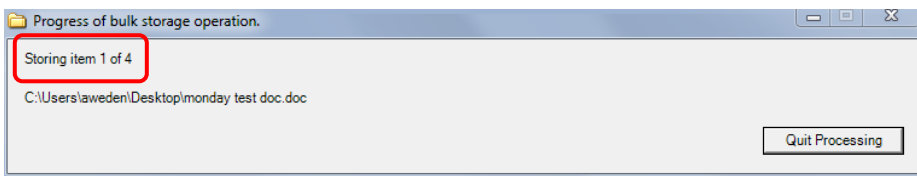


Select from the **Title Formats** at the bottom how you would like the numbers to display. Select **Apply**.  
Click **Yes** to the following warning:

Click **Save**. A **New Record Document** form will appear as per **Section 5.1**.

The **Title** is inherited from the title in your network drive, it can be edited within this screen if desired; the **Container** populated with the record number of the folder that you dragged the document into.

A second dialogue box will also be present in the top of the screen called **Progress of Bulk Storage Operation**. This will show the progress of the documents being saved. It will disappear when all of the documents have been catalogued.



Click **OK**.

### 5.3.2 DRAG AND DROP A SINGLE DOCUMENT

For a single document, highlight the required document and drag and drop to the relevant Records Explorer folder.

The **Drag and Drop Options** dialogue box will pop-up. All of the drag and drop options except “Attempt to store all...” will have the same affect for a single document as a multiple document drag and drop. Click **Save**.

A **New Record Document** form will appear. Alter the title, author etc if desired. Click **OK**.

## 5.4 “DIRECT SAVE AS”

It is possible in the HP TRIM 7 release of Records Explorer to save a MS Office or Adobe document directly to Records Explorer in the normal Windows Explorer way.

However, please ensure that the folder that you wish to save the document into is available under **Tagged Records, Favourite Records or In Tray** as you will not be able to conduct a search once in the “Save As” process.

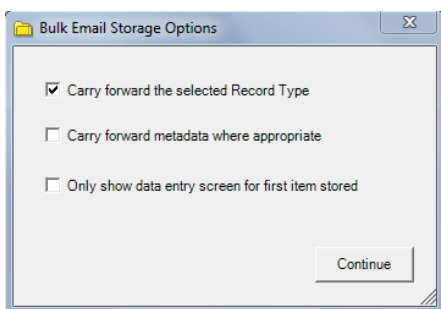
With the document open, select **Save As > Word Document (for example)> My Computer > Records Explorer > USYD\_TRIM\_Production** and then navigate through to the required folder. Click **Open**.

Upon saving the **New Record** entry form will display. Complete the title and save. The document will remain checked out for editing until it is has been closed.

## 5.5 SAVING OUTLOOK ITEMS

Outlook items can be saved using drag and drop, as per a document from your network drive. They can also be dragged over in bulk by highlighting all relevant emails and dragging into Records Explorer.

The **Bulk Email Storage Options** box will pop-up:



Always leave **Carry forward the selected Record Type** checked.

Check **Only show data entry screen for first item stored** so that a New Record Form will display for one item only; all subsequent items will be stored without need of your interaction.

If dragging a large portion of emails over at once, the screen may freeze while this is in progress. There is no “Progress of bulk email storage operation” dialogue box as there is when dragging documents from the network folders. Progress can be monitored by the appending of the words “TRIMDB:US” in front of the email subject line as the email is successfully catalogued. RMS recommends limiting the number of emails being dragged over in a single drag and drop to a maximum of 50 at a time. You will be able to distinguish catalogued emails from uncatalogued emails by “TRIMDB:US” appearing in front of the email subject line.

## 5.6 SAVING EMAIL ATTACHMENTS ONLY

### 5.6.1 DIRECT DRAG AND DROP

In the HP TRIM 7 version of Records Explorer direct drag and drop of email attachments has been enabled.

Highlight the attachments and drag them to the appropriate folder in Records Explorer. Let go of the mouse button. The Drag and Drop options will pop up the same as if you had dragged these documents from the network drive (See **Section 5.2**). If you have dragged multiple documents over then, use the “Attempt to store all after the first one without user interaction” button. Click **Save**. The bulk progress bar will display while the attachments are being logged to TRIM.

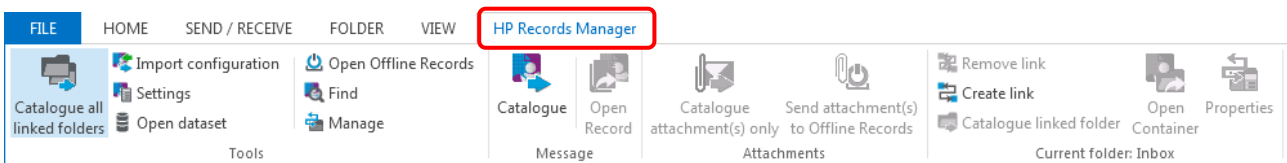
### 5.6.2 SAVING AN OPEN ATTACHMENT (MS OFFICE AND ADOBE DOCUMENTS ONLY)

If the attachment is open and is a MS office or Adobe document, then select **Save As > My Computer > Records Explorer** and navigate through to the correct folder. (As per **Section 5.4**)

### 5.6.3 TRIM OUTLOOK EMAIL PLUG-IN

With Drag and Drop enabled this tool is not particularly necessary – however, if you have a simple folder structure you may wish to map your outlook folders to matching Records Explorer folders if the bulk of your documentation is in email format.

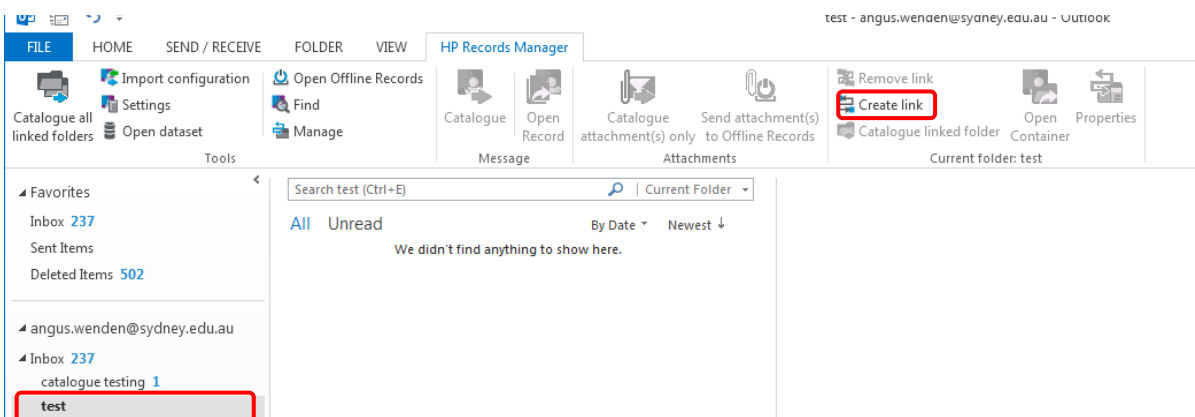
In your Outlook you will see the ‘HP Records Manager’ tab on your tool bar:



Take note of the Record Number for the folder you wish to map to. (**Note:** you can title your outlook folder as you wish. In this case, ‘test’ has been used for demonstration purposes.)

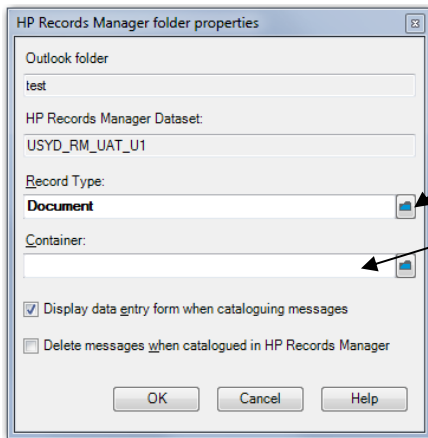
Highlight the folder in your Outlook Inbox.

Select the **Create Link** button



A **TRIM Folder Properties** dialogue box will pop up:





Select (with the blue folder icon) or type in **Document**

Type the TRIM **Record Number** in the **Container** field.

It is recommended that you leave **Display data entry form when cataloguing messages** ticked. (Occasionally if Outlook does not close properly the HP Records Manager add-in will disappear and needs to be reinstated from the **Disabled Items**. You will know that this has happened immediately if you drag an email into a mapped folder and the New Record dialogue box does not pop up.)

Click **OK**.

You can now drag emails into that Outlook folder and they will be catalogued into TRIM. The word TRIM will be added as a prefix to the Email subject line as a further indication that the document has been saved.

#### 5.6.4 CALENDAR ITEMS

Presently Records Explorer cannot support calendar items that are dragged directly from Outlook. If you wish to save these document types please save them to your network drive/desktop in **iCalendar Format** (.ics extension)

Then save it into Records Explorer using Drag and Drop as you would any other document stored in your network drive. This will allow you to open the document and launch it into its original format to see all the contextual information such as attendees.