



THE UNIVERSITY OF
SYDNEY

Records Explorer MANUAL

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ARCHIVES & RECORDS MANAGEMENT SERVICES

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6 NAVIGATION

6.1 TAGGED RECORDS

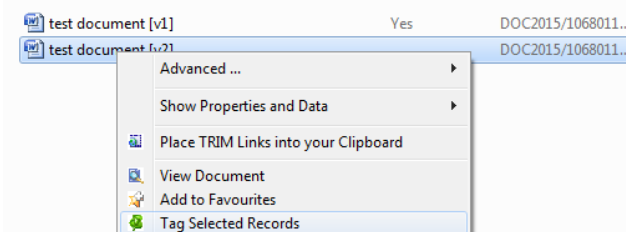
Tagging records allows you to group together records that may not otherwise be related. Tagged Records lists are personal and can only be viewed by you.

Run a search for folders or documents that you would like to tag, or perform this task after creating of a new record.

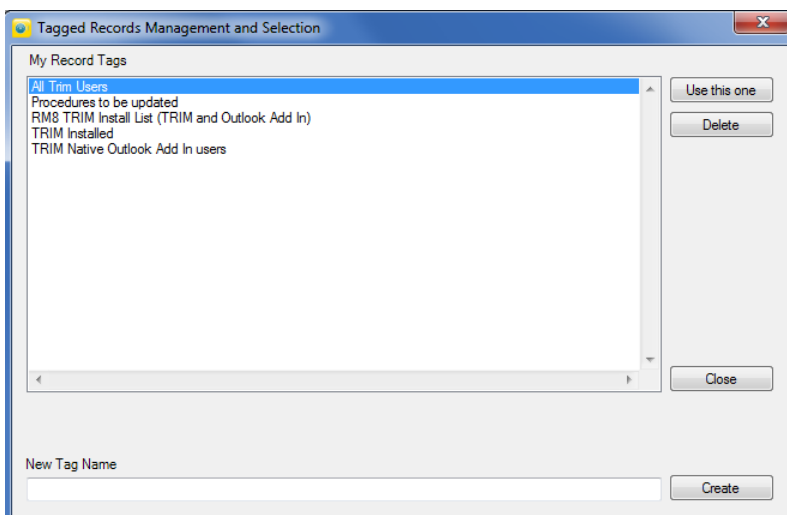
6.1.1 “TAGGED RECORDS MANAGEMENT AND SELECTION” DIALOGUE BOX

Select the records that you want to tag from the search results. (To highlight multiple records follow the instructions in **Section 2.4.**)

Right Click on the text block and select **Tag Selected Records**



The **Tagged Records Management and Selection** dialogue box will pop up:



This will be blank when you first start using Records Explorer. (See **Section 6.1.2** for creating a new tag. See **Section 6.1.3** for how to select an existing tag.)

As your tag list become long, or if the tag names are lengthy, the scroll bars will allow you to see the full list/tag name.

6.1.2 CREATING A NEW TAG

To create a new tag, type the name under **New Tag Name** in the bottom of the **Tagged Records Management and Selection** dialogue box and click **Create**. The tag will then be added to the **My Record Tags** list.

To use the tag, highlight it and click **Use this one**.

The new tag will now appear under the Tagged Records menu item.

6.1.3 SELECTING AN EXISTING TAG

Once a tag has been created you can simply **drag** new documents or folders **over the tag and drop**.

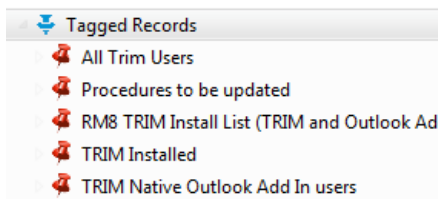
You will receive a dialogue box to confirm that you wish to tag the records. Then a confirmation that the record has in fact been tagged.

You can also right click on the record you wish to tag > **Tag Selected Records** and select the relevant tag from your My Record Tags list. Click **Use this one**.

6.2 RETRIEVING THE RECORDS THAT HAVE BEEN TAGGED

Expand the Tagged Records option in the left pane list.

Double click on the tag name to open up a list of all of the tagged records in that tag.

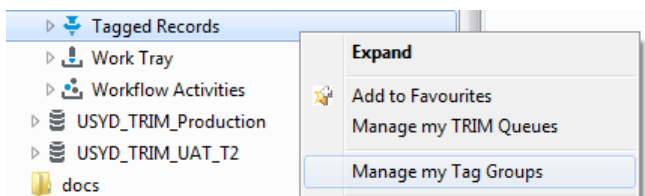


Tagged Records, or individual tags can be dragged to the desktop as a shortcut if desired.

6.3 MODIFYING A TAG

Tags can be deleted, but cannot be renamed. Deleting a tag does not affect the records within, they still exist.

To delete a tag, right click on the relevant tag and select **Manage my Tag Groups**:



Highlight the required tag and select **Delete**.

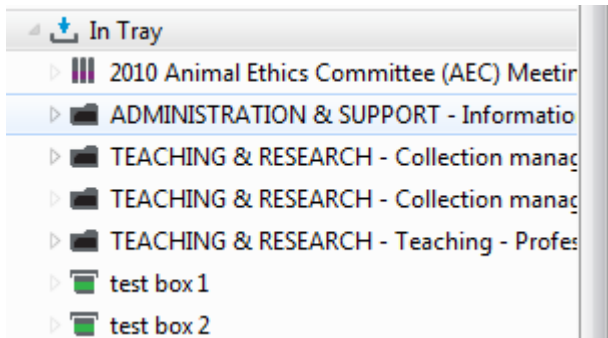
If you wished to change the name of the tag and retain all the tagged records, first create the new tag name.

Open the existing tag, highlight all the records, left mouse click on the records and drag them to the new tag.

Then, delete the old tag.

6.4 IN TRAY

The **In Tray** is located in the menu options and is populated with folders that have been assigned to you. Double click on the **In Tray** to view its contents:



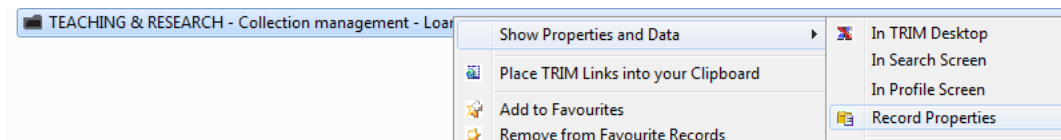
The In Tray will hold folders and paper files that have you as the “assignee”. This form of navigation is not used by most business units as most matters have multiple people contributing to the record keeping. You may not have any records in your In Tray, this is normal.

Assignee is only set against a top level Electronic Folder. Sub Folders and Documents are considered to be “Contained in” the top level folder.

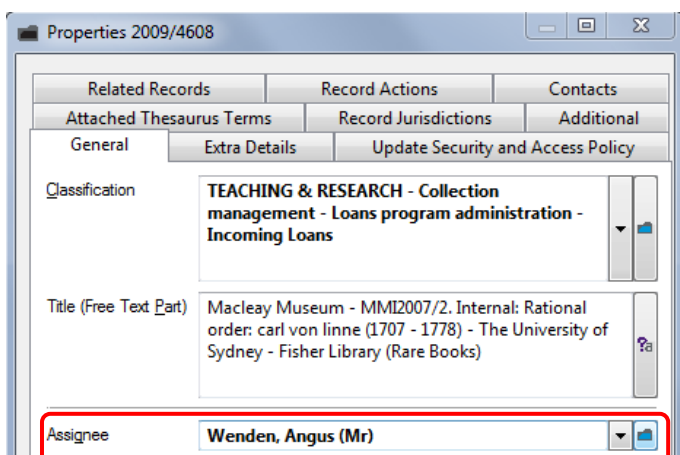
6.5 CHANGE ASSIGNEE

6.5.1 CHANGE ASSIGNEE FOR A SINGLE FOLDER

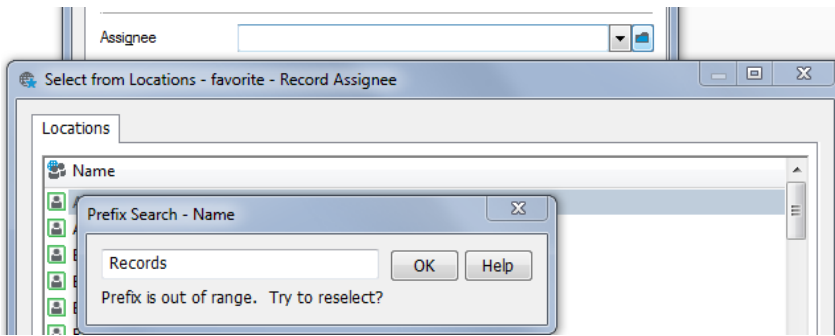
If a project has been reassigned to another officer, the Assignee can be changed by navigating to the appropriate Electronic Folder and Right Click > **Show Properties and Data** > **Record Properties**



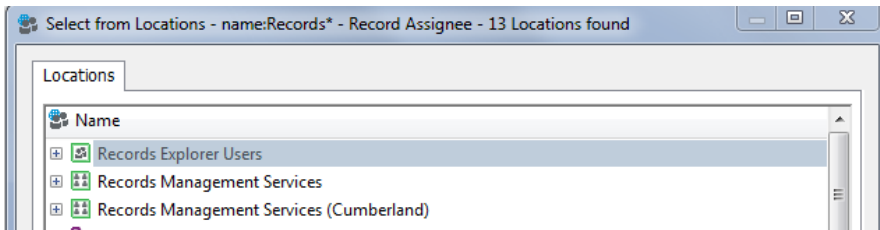
Select the blue look-up folder to the right of the **Assignee** field:



The **Select From Locations** dialogue box will pop up with the current Assignee listed. Simply begin typing the surname of the new Assignee. The **Prefix Search – Name** dialogue box will appear. Hit **Enter** / click **OK**.



A list of all people with surnames beginning with those letters will appear. Select the appropriate person from the list. Click **OK**.

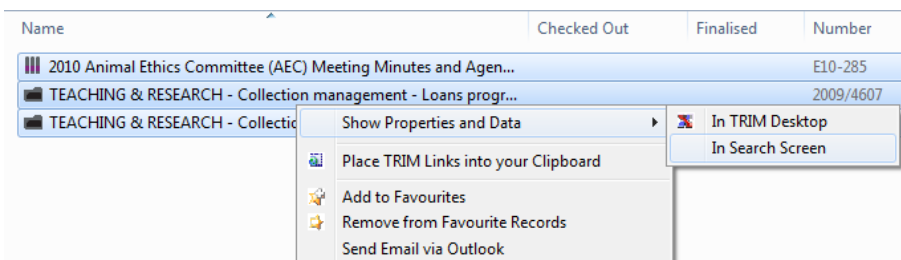


This will return you to the **Properties** screen. Click **OK**.

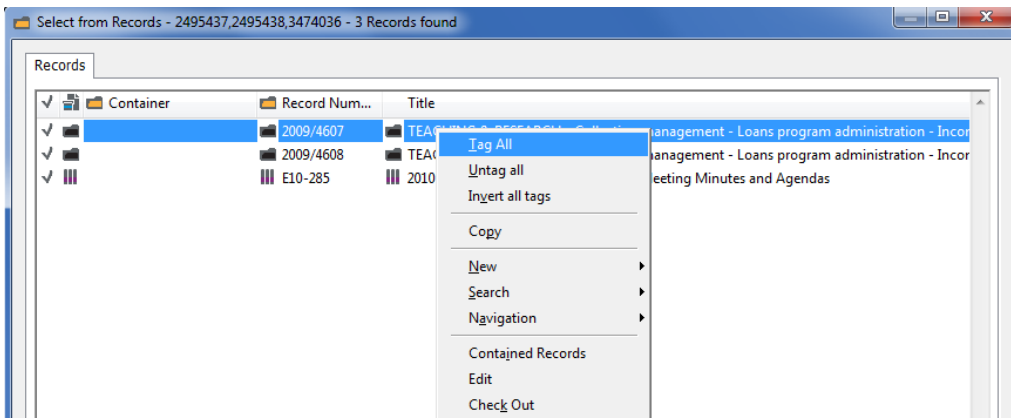
The Assignee is now changed. The folder will now appear in the **In Tray** of the new Assignee and will no longer be in the In Tray of the previous Assignee. The folder is still searchable and accessible by all relevant parties.

6.5.2 CHANGE ASSIGNEE FOR MULTIPLE FOLDERS

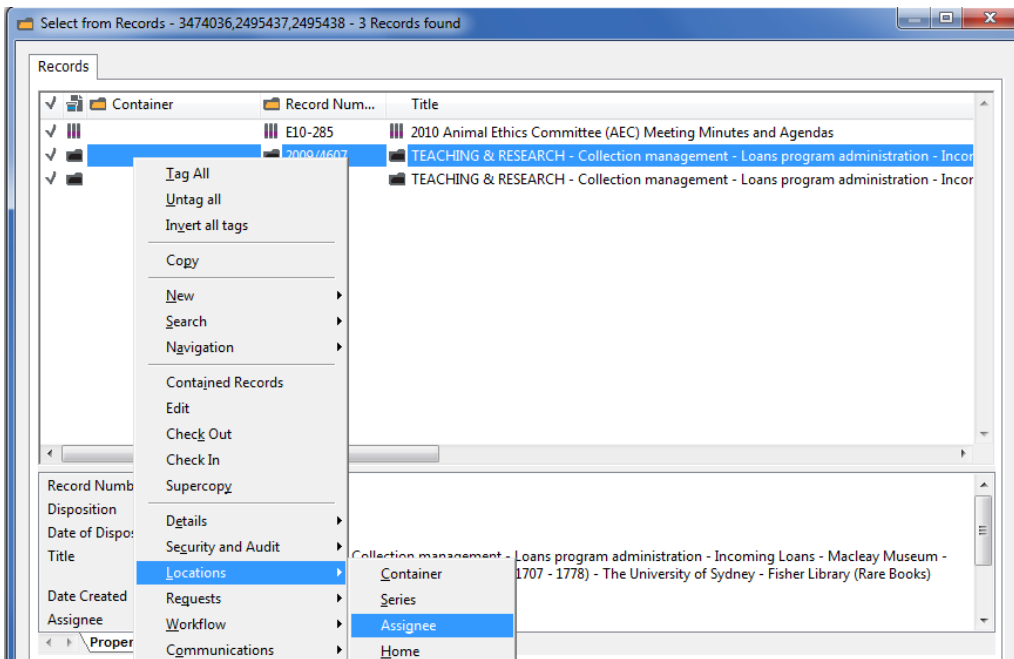
To change the Assignee for a large number of folders, navigate to the appropriate folders via a search, a tag, your own In Tray etc. Highlight all of the relevant folders by following the instructions in **Section 2.4**. Right Click > **Show Properties and Data > Show in Search Screen**:



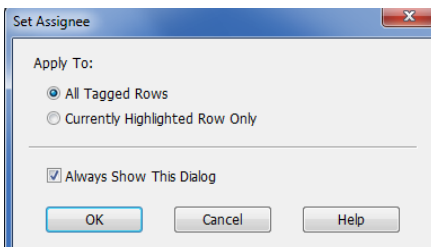
The **Select From Records** dialogue box will pop-up listing the selected folders. Right Click > **Tag All**:



A tick will appear next to all of the Folders. Right Click > **Locations** > **Assignee**



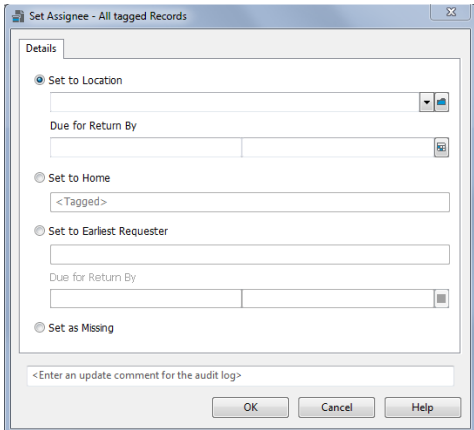
The **Set Assignee** dialog box will appear.



Ensure that **All Tagged Rows** is selected.

Click **OK**.

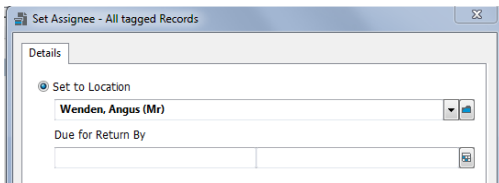
In the **Set Assignee – All Tagged Rows** dialog box



Select the blue look-up folder to the right of the **Set to Location** field

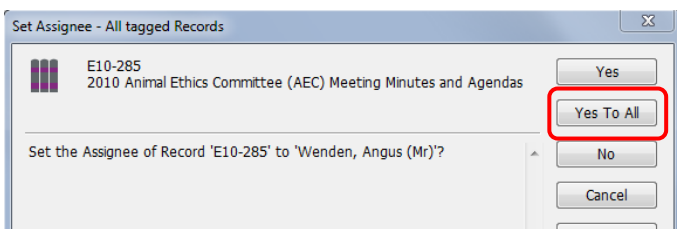
The **Select From Locations** dialogue box will appear. Begin typing the surname of the new Assignee (see **Section 6.7.1** for detail). Click **OK**.

Select the correct user from the resulting list and Click **OK**.

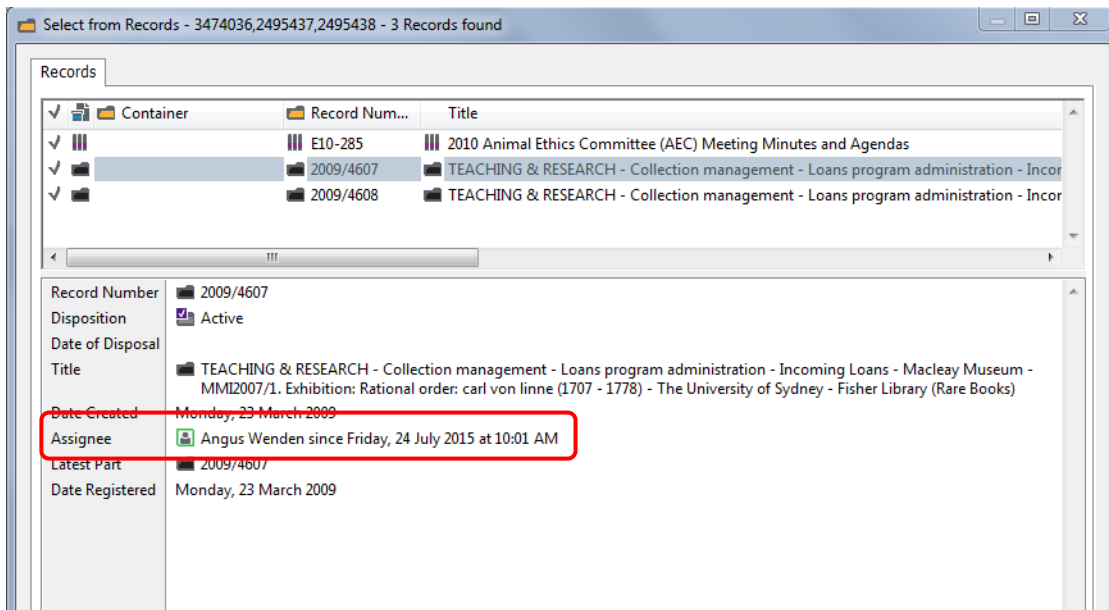


In the **Set Assignee** dialogue box, click **OK**.

Select **Yes To All**



When the **Set Assignee** dialogue box disappears your list of folders will be displayed and the Assignee will reflect the changes:



Close the dialogue box and return to Records Explorer, which will still be open in your task bar.

The folders will now be reassigned and will now appear in the In Tray of the new assignee.