



THE UNIVERSITY OF
SYDNEY

Records Explorer MANUAL

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ARCHIVES & RECORDS MANAGEMENT SERVICES

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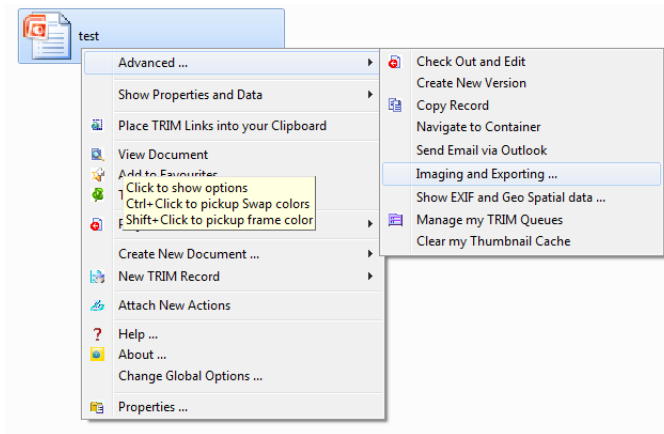
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8 EXPORTING DATA AND THE PROJECT CONTROL CENTRE

Please talk to the **Records Online helpdesk** or you **Records Management Services Project Officer** for advice before using these features.

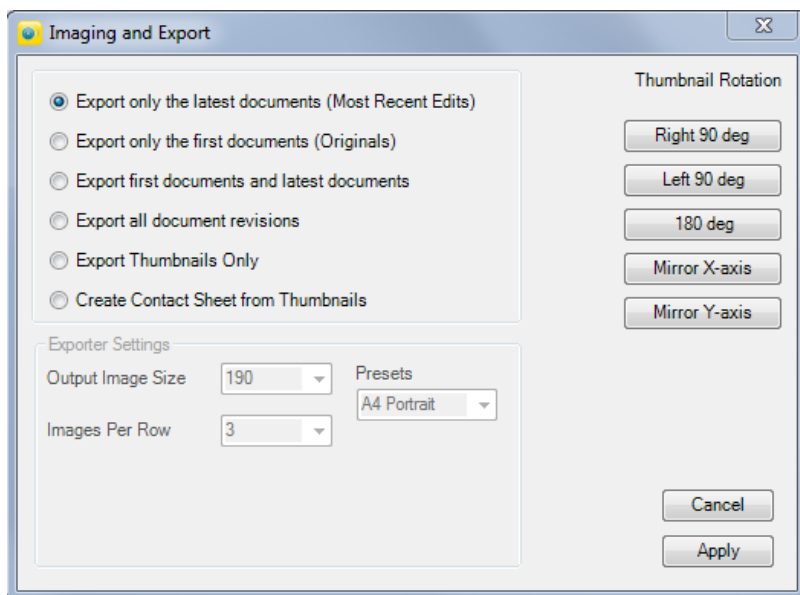
8.1 IMAGING AND EXPORTING

You may need to remove documents from TRIM in bulk in order to send them on to external clients etc. If all are located in a single subfolder, simply highlight the necessary documents > Right Click > **Imaging and Exporting**. (this will be in the **Advanced** menu if you only select a single document to export).



Select what versions of the documents you wish to export – this is defaulted to the Latest edits. TRIM is currently not supporting Thumbnails so please ignore these options.

Select **Apply**



You will need to pick a place to save the documents – i.e. the Desktop or My Documents

Click ok.

8.2 PROJECT CONTROL CENTRE

You can only export one folder structure at a time. However, if you have an Electronic Folder and alternatively contain multiple folders inside that Folder, the alternative contents then act like sub folders to the top folder allowing you to export multiple folders in one action.

Please ensure that the Top Folder has a short title, **a maximum of 40 characters**, if you wish to send the extracted file off as **a large file transfer** through the University's web page. An additional 8 characters will be added to the title upon extraction which will bring the title up to its limit of 50 characters.

8.2.1 CHANGE ALL TITLES TO WINDOWS SAFE CHARACTERS

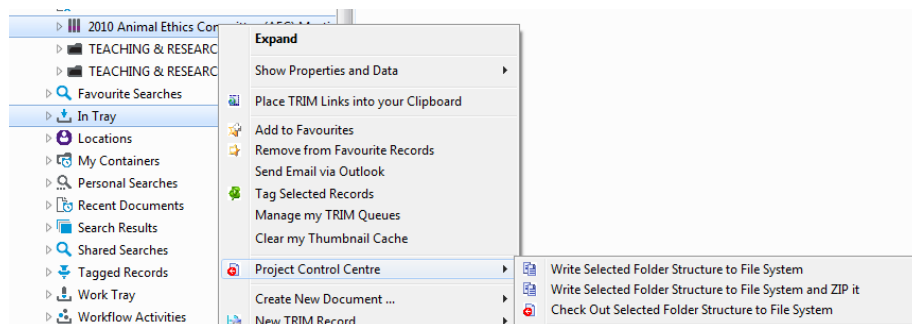
This feature only affects one layer of the folder structure. You need to go into each sub folder to make the characters of documents within safe. The best method therefore is to make them safe upon saving – please minimise all punctuation and characters in titles.

Please save items without unsafe characters including FW: or RE: in email headers. Any documents with unsafe characters will not be extracted.

8.2.2 WRITE EXISTING FOLDER STRUCTURE TO FILE SYSTEM

This will create a normal windows folder that mimics the structure you just extracted. Only folders / sub folders with contents will be extracted. Empty folders will not be included.

Right click on the electronic folder required > **Project Control Centre > Write Selected Folder Structure to File System**



This process (and those outlined in **8.2.3** and **8.2.4**) may take several minutes depending on the size of the items you are extracting. Please leave it alone while it is processing. You can still work on other non-Windows Explorer applications including Outlook, Internet Explorer, Filemaker Pro and TRIM Context in its native format.

When it is complete the location of the folder will display in a Windows Explorer page. Minimise this to see the report of documents extracted. See **Section 8.3** for more details

8.2.3 WRITE EXISTING FOLDER STRUCTURE TO FILE SYSTEM AND ZIP IT

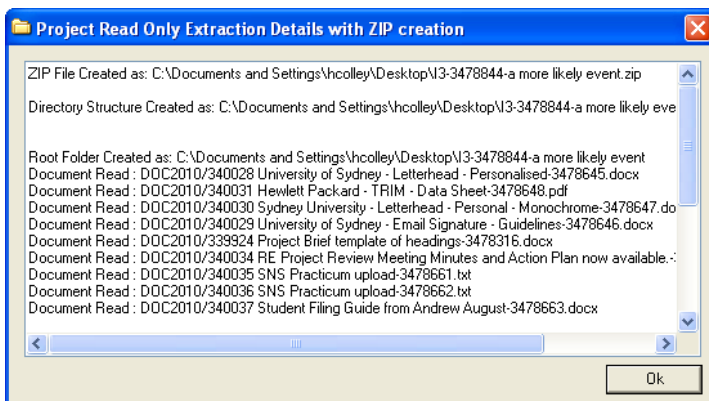
Follow the steps in Section 8.2.2 but select the option with “and ZIP it”. This will produce both a normal windows folder and a zipped folder being extracted.

8.2.4 CHECKOUT SELECTED FOLDER STRUCTURE TO FILE SYSTEM

This feature extracts the files into a normal Windows folder, however all of the documents inside will be checked out to you as though you are editing them. This is not recommended unless used in a controlled environment.

8.3 PROJECT READ ONLY EXTRACTION DETAILS

Once the extraction is complete and the Desktop pops-up in a Windows folder, a report of the documents extracted will be displayed. If you click back into Records Explorer you will see a report of the documents that were exported.



Any that read “**Could Not Extract**” will not be present in the extracted folder. Generally this will only happen to documents that have titles with “unsafe characters”. If there are any documents that did not extract which have entirely windows safe characters please contact RMS to investigate the reasons.

It is possible to export the remaining document(s) by locating them in the TRIM folder and following the steps in 8.1 for Imaging and Exporting. Once saved, drag the document into the folder structure you had extracted previously. This will work for zipped folders as well.

8.4 SENDING ZIPPED FOLDERS TO CLIENTS

If you send the zipped folder to a client, please ask them to “Extract All files” before viewing the documents inside as this will ensure that the documents will open. Occasionally a document exported from TRIM in this Export and Zip action will not open directly from the zipped folder and extraction will solve this issue.

