



THE UNIVERSITY OF  
**SYDNEY**

# Records Explorer MANUAL

**August 2015**

## **ARCHIVES & RECORDS MANAGEMENT SERVICES**

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## 9 GLOSSARY

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TERM	EXPLANATION
<b>TRIM</b>	The program for which Records Explorer is an interface. Also referred to as <b>HP TRIM</b> in the Drag and Drop Options.
<b>Record</b>	Any evidence of a business transaction taking place – an email, memo, tender, letter, meeting minutes etc.
<b>Folder</b>	Much the same as a Windows Explorer folder, though with additional metadata. Used in this guide as an abbreviation of the following*:
<b>*Electronic Folder</b>	Refers to the top level folder in the structure, Electronic Folder is the name used in TRIM. This is where the summary of the project is recorded. Documents should not be added at this level.
<b>*Sub Folder</b>	Second layer of the folder structure; Sub Folders are contained within an Electronic Folder. Documents can be added at this level if there are no User Sub Folders within.
<b>*User Sub Folder</b>	Third layer of the folder structure; Documents should always be added at this level unless no User Sub Folders exist. “User Sub Folder” is the name used in TRIM, it has a pink icon.
<b>Document</b>	The form that a record takes – Microsoft Office applications, CAD, Outlook items etc.
<b>Container</b>	Folder in which a Sub Folder or document is stored.
<b>[Blue] Look-up folder</b>	 Contains different features depending on where the look-up is located, click on the look up to make selections.

## 10 TROUBLESHOOTING

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### 10.1 LEFT HAND MENU

The left hand list pane displays a selection of your search results. Do not be alarmed if this does not refresh at the same speed as the right hand view. You can Right Click > Refresh Folder to force a refresh. Some features in the left hand pane will only refresh after you have closed the application.

### 10.2 F5 REFRESH

If you are refreshing in order to see “Checked Out” update and it is causing the “**Search For Records**” to pop up, instead wait til later in the session and check under “My Checked Out Documents” instead. If they are still “Checked Out” ensure that all documents are closed and use the Profile Screen (double click) or Right Click > Advanced > Check In.

### 10.3 SEARCH FOR RECORDS DIALOGUE BOX POPPING UP

This happens occasionally on an F5 refresh particularly in the Shared/Saved Searches functions. Records Management Services aim to improve this functionality on the next release. Try clicking out of the folder and then back into it again rather than using the F5 button to refresh the screen. This should update the view.

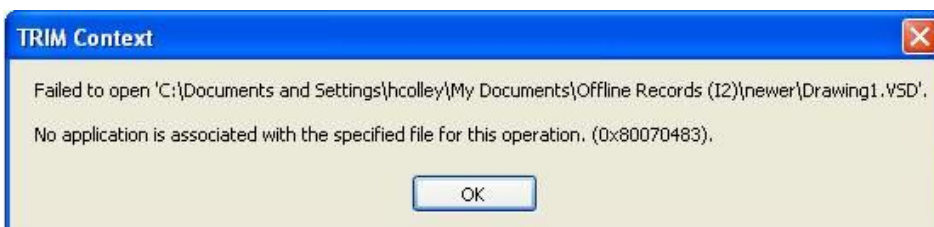
### 10.4 CANNOT EDIT A DOCUMENT

Is it finalised? If yes, it cannot be edited. You should create a New Version and make changes to that.

Is it checked out to someone else? If so, ask that person to check it back it back in so that you can make changes.

### 10.5 DOCUMENT WILL NOT OPEN WHEN I CLICK EDIT

You can only open a document for edit if you have the application installed on your PC. e.g. if you wish to open a CAD document you must have the compatible software installed on your computer or else you can only see a Read-Only version in the **TRIM Document Viewer**. You may receive the following message:



It may also try to launch Internet Explorer, to direct you to the software.

