RAMS

Quick Reference Guide

UNSW SYDNEY

For RAMS support:
Contact the Records & Archives Team
records@unsw.edu.au

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Introduction to Recordkeeping

What is a record?
A record is any document you make or receive as part of your work that provides evidence of action.
The University owns all records created and received by its employees. These records provide evidence of what was done or decided and together, they form a vital University asset.

What is an archive?
An archive is a record we have committed to keeping forever for its cultural, historical and/or evidentiary value. This may be for legislative requirements, or it may be based on the University's own requirements.
The University Archives is where these materials are stored and maintained by our archivists.

Which records do I need to keep?
You need to make and keep records of your work at the University and ensure these records are captured to an appropriate business system. Appropriate systems will manage the records in the right conditions for the right period for you.

RAMS Overview

What is RAMS?

RAMS is an electronic document and records management system capable of managing the full lifecycle of corporate information. RAMS audits all record events and activity, who enacted them, and at what time. For example, the viewing, editing, printed, emailing etc. of a record.

RAMS ensures the University of New South Wales meets its legislated information management requirements under the State Records Act 1998 (NSW), whilst keeping information secure.

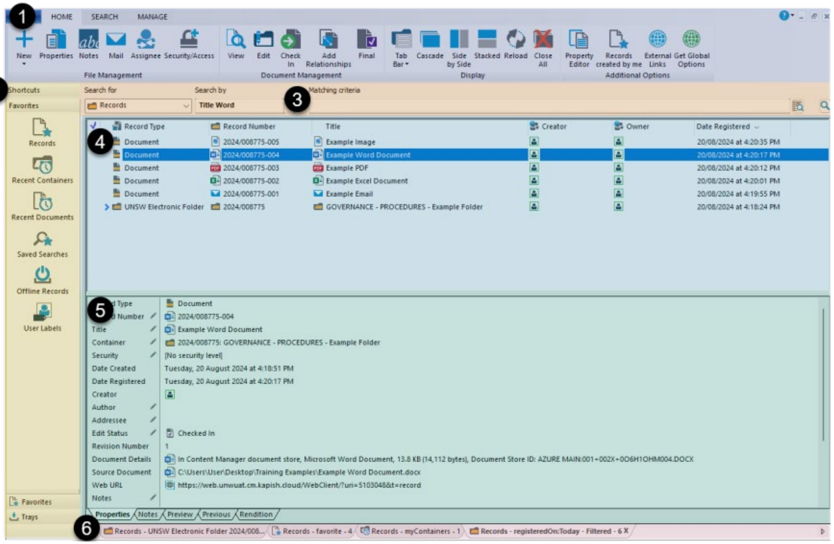
How to Access RAMS

To access RAMS, **double-click** on the **RAMS** icon from your Windows desktop. It will open on the **Home ribbon**.

Please note, within RAMS you will see the product name Content Manager referenced. RAMS and Content Manager are used interchangeably.

Content Manager

The RAMS Interface



The RAMS interface is made up of 6 main sections.

1. Ribbons – Contains the tools for working with records.
2. Shortcuts – Quickly navigate to frequently used or favourite records.
3. Quick Search Bar – Provides a fast way to find records.
4. List Pane – Displays matching search results.
5. View Pane – This displays the metadata properties for the selected folder or document.
6. Window Navigation – Navigate between your open RAMS windows.

Container Titles

All records in RAMS are captured to a container. A RAMS container allows us to organise records by the specific process or activity being carried out.

Every RAMS container has a few key components:

Here are some examples of RAMS Container Record Titles showing the function and activity in capitals, followed by free text to clarify the activity being captured:

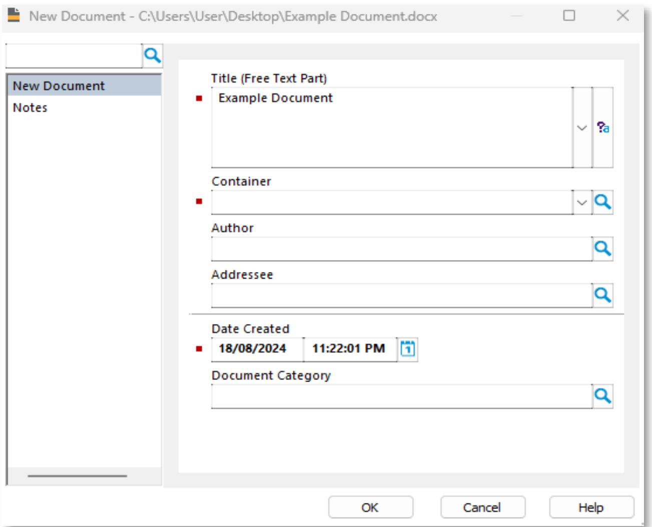
- COMMUNITY – EVENTS – School of Dark Arts – Graduation Ceremony 2019
- PROPERTY – INSTALLATION – Whomping Willow – Collision Avoidance Lights – June 2020
- STRATEGIC – PLANNING – Hogwart's Transport Infrastructure Review – Project 9.5
- STUDENT ADMINISTRATION – APPLICATIONS – Muggle Access Scheme – A to G – S1 2019

RAMS Container Record Titles

The University has an approved Guideline for titling. You can access it here, opens in a new window.

It is recommended to title records consistently across media to allow for consistent identification, capture and retrieval of information.

The following general guidelines are recommended:



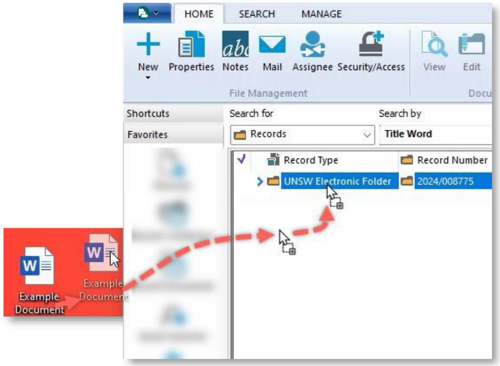
RAMS Document Titles

- Punctuation (commas, apostrophes, quotation marks) should be avoided except where they form part of a proper noun (e.g. St Vincent's Hospital). Full stops can be used if required.
- Hyphens are used - to separate different components of free text titles - but must always be surrounded by spaces. i.e.; RAMS Training - Quick Reference Guide - Revising Records.
- Avoid the use of filler words such as "about", "also", "whom" etc.
- Limit text - essential words - aid retrieval - summarise content.
- Text must be entered in normal prose format. For the purpose of consistency and ease of viewing, use capitals for proper nouns and avoid the use of ALL CAPITAL or all lower case.
- Abbreviations should be contained within parenthesis and directly follow the unabbreviated name of the body or project - e.g. Honorary Degrees Committee (HDC)
- Dates should be entered as dd month yyyy - e.g. 29 March 2019.
- Do not abbreviate the month or year. Always include the full date, or month, or year where applicable.
- For date ranges, separate dates by space to space - e.g. March 2019 to June 2020.
- Student names must use the format: SURNAME, First Name(s) - e.g. ALBANY, Marise
- All other names may be entered as INITIAL(S) Surname - e.g. J Rodriguez

There are three different methods available for saving records and emails into RAMS. After step 2 for each method proceed to **page 10**.

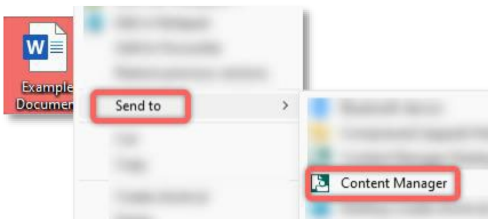
1. From a Desktop/File Location

1. Open RAMS and locate the folder to add the record to.
2. Left click on the record, **drag** the record from the file location **and drop** it onto the folder.



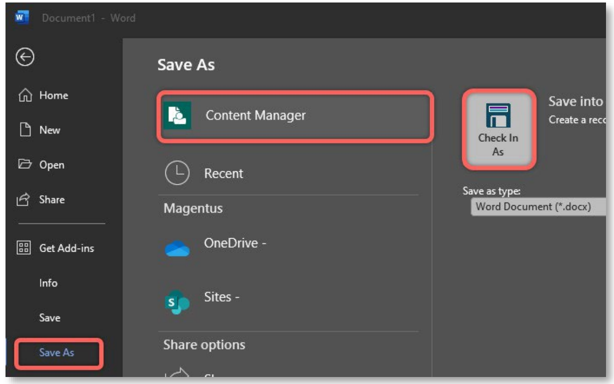
OR

Right click > Send to > Content Manager.



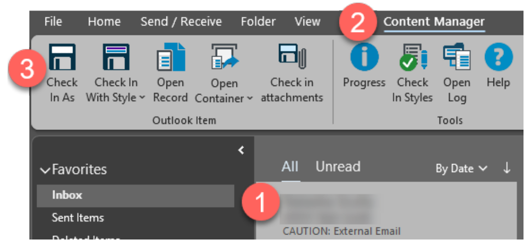
2. From Microsoft Word or Excel

1. From the Word/Excel document select **File > Save As**.
2. Select **Content Manager > Check In As**.



3. From Outlook

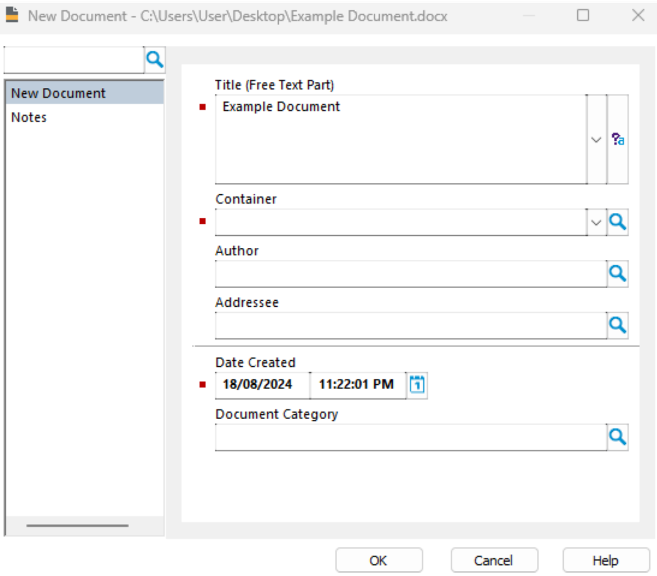
1. From Outlook select the email.
2. Click the Content Manager tab in the ribbon > **Check In As**.



Saving New Records

After using one of the three methods to move the new record into RAMS, the **New Document form** will appear. This is where you will give the new record a title and select the folder it will be saved within.

Fields marked with a red square (■) denote a mandatory field that must be completed before you can successfully save the new record.



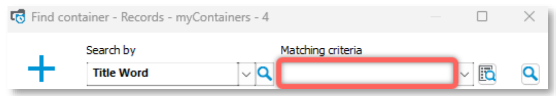
1. Complete the relevant metadata fields for your new document.

- **Title (Free Text Part)**
  Enter the title of your record using the UNSW standard naming and titling convention.

- **Container**
  Use the arrow ( ) at the end of the field to select a recently used folder from the drop-down menu.

OR

Use the magnifying glass ( ) to search for the folder to save the record to.



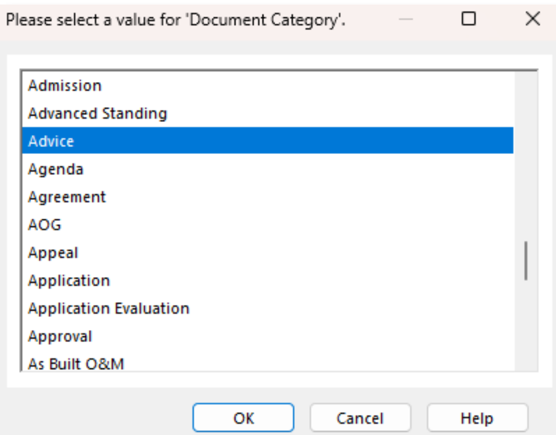
ⓘ If you have dragged and dropped the new record into RAMS, the container field will pre-fill with the folder number.

Author
This is the person who wrote the document. This may be someone internal or external to UNSW.
Use the magnifying glass ( ) to search the RAMS directory for the relevant person.

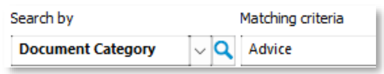
Addressee
This is the person, people, or organisation who are the recipients of the document.
Use the magnifying glass ( ) to search the RAMS directory for them.

- **Date Created**
  Enter the date the document was written. This field will auto populate with today's date, but you can back date this field by clicking in the box and typing in or selecting a new date.

Document Category
Click the magnifying glass ( ) to select the relevant document category from the menu.



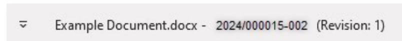
2. Once all mandatory and other relevant fields are completed click **OK** to save your new document into **RAMS**.



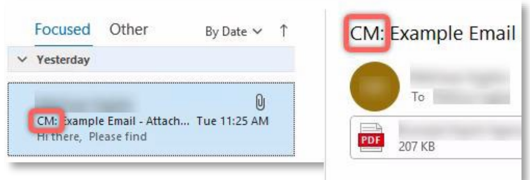
ⓘ Each field that is completed on the new data entry form is a field that can be searched on and used to sort by later. For example, Document Category.

How to Check the Record has Registered to RAMS

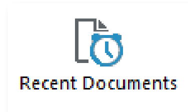
From Word/Excel
The title will change from *Document1* to the title you registered it as and the record number will be at the end of the title.



From Outlook
The email will now have the prefix CM: in front of the subject line.



From RAMS
Go to the Recent Documents shortcut.



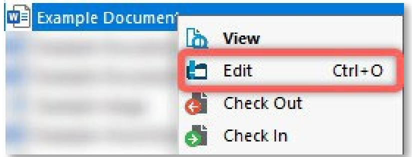
Working With Documents

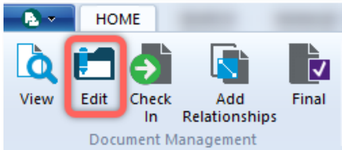
Editing Documents

1. Select the document > **Right click > Edit**.

   OR

   Select the document and click **Edit** from the Home ribbon.

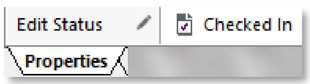




2. The document will open in the authoring application (e.g. MS Word) and will be checked out to you. Make your changes to the document.
3. Select **Save** on the Office Ribbon (not Save As) and close the application. The record will check itself back in to RAMS after saving.

Edit Status

The editing status of the document is available on the **Properties** tab of the **View Pane**.

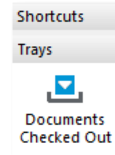


This will tell you if the document is:

Checked In	Available for editing.
Checked Out	Someone else is working on it.
Finalized	No longer editable. Read only

Documents Checked Out

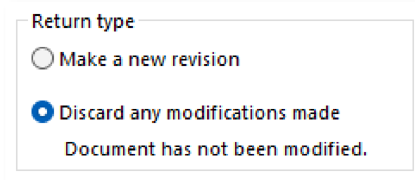
To view all the documents Checked Out to you at any given time, navigate to **Shortcuts > Trays** > **Documents Checked Out**.



Manual Check In

On occasion, a document may get 'stuck' Checked Out to you. This can be manually checked back in so that others can view your changes.

1. Select the document and click **Check In** , either from the **Home Ribbon** or right click menu.
2. Select the relevant return type from the window that appears.
3. Click **OK.** The document will be checked back in.

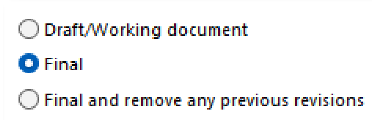


Finalising Documents

Finalising a document will lock the document from further editing and become a read only record.

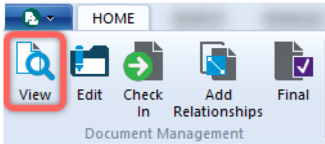
1. Select the document and click **Final** from the Home ribbon.
2. Select **Final** in the Make Final window **>** select **OK.**

ⓘ To unfinalise the record, contact the Records & Archives Team.

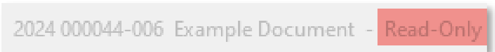


Viewing Records

To view a record, select the **record > View** from the Home ribbon; **or double click** on the record.



This will open in the authoring application in a Read Only mode.



Record Revisions

Revisions are a modified copy of a document. There can be multiple revisions attached to a document. Each time a document is edited a new revision is created. All revisions can be accessed through RAMS.

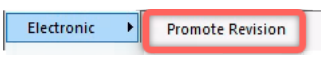
View a Previous Revision

1. Right-click on the document and select **Electronic > Revisions**.

2. On the revision you want to view **right-click >** select **View**.

Promote a Previous Revision

3. Right-click on the document and select **Electronic > Promote Revision**.



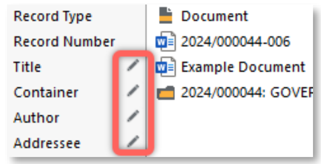
4. **Select the revision** you want to promote (you can Right click > View to view the revision before promoting) **>** select **OK**.

Document Properties

The properties of a record is the metadata, or information, about the record itself. If this has been entered incorrectly or not added yet, you can edit some record properties.

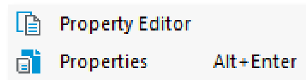
From the View Pane

Select the record and from the view pane click the pencil icon next to the field you want to edit.



From the Right-Click Menu

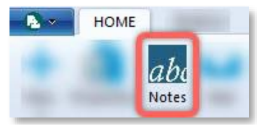
Right-click on the document and select **Properties**.
For editing multiple properties at once select **Property Editor**.



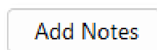
Adding Notes to a Record

Notes are useful for documenting the progress of a matter, making comments during document development, or giving directions on the matter.

1. Select the document, click **Notes** on the **Home** Ribbon.



2. Click the **Add Notes** button.



3. In the new window type the required note (use the check Spelling button if required).
4. Click **OK** twice.

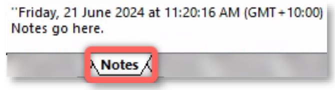
Viewing Notes

To review the notes that other users have added to records:

1. Select the document, click **Notes** on the **Home** Ribbon.

   OR

2. Select the Notes tab on the View pane.

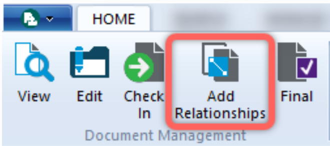


Record Relationships

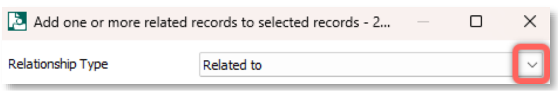
Record Relationships are created to link records that have related information together.

* Before starting this process have the record number of the record/s you are relating to noted/copied down.

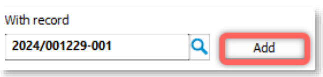
1. Select the document > click **Add Relationships** from the Home ribbon.



2. Select a Relationship Type from the drop-down menu (**Related to** is recommended).



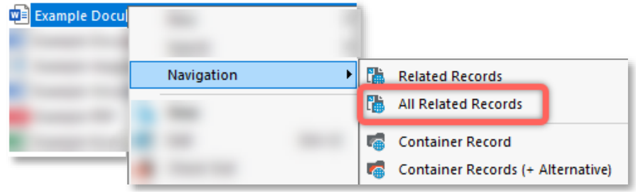
3. In the **With record** field type/paste the record number of the record you are relating to> Select **Add**.



4. Select **OK** to save the relationship.

Navigating to Related Records

1. Right-click on the document and select **Navigation > All Related Records.**



2. All items related to that record will display.

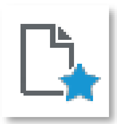
The relationships in the Navigation menu.

Term	**Definition**
Related Records	Displays the records that are currently related to the selected record.
All Related Records	Displays the records that are currently related to the selected record AND the select record.
Container Record	Displays the selected record's container record.
Container Records (+ Alternative)	Displays the selected record's container record and alternative containers.
Contained Records	On folder records this displays the records that are inside the folder.

Favourites and User Labels

Adding to Favourites

You may wish to add documents you use or reference regularly to your **Favourite Records** for easy and quick access.



1. Select the relevant folder or document, right-click and select **Send To > Favourites.**
2. The record will be added to your **Favourite Records** (on the Favourites Shortcuts pane).

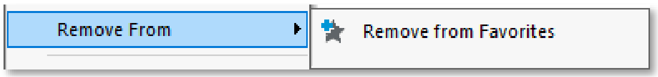
ⓘ In RAMS the term *Records* refers to Folders **and** Documents.

ⓘ You can also use the F4 button on your keyboard to add to favourites.

Removing from Favourites

To remove an item from your Favourites:

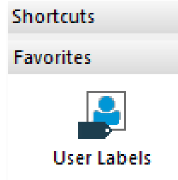
1. Select the relevant document.
2. Right-click and select **Remove From > Remove from Favourites.**



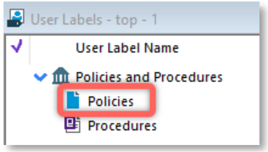
3. The item will be removed from your Favourites list.

Viewing User Labels

1. Navigate to **Favourites > User Labels**.

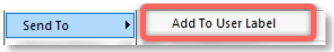


2. Double click on the User Label to view the records attached to it.



Adding to User Labels

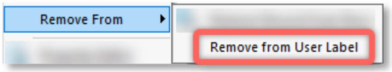
1. Search for the records and folders you would like to add to the user label.
2. Select the record/s
3. Right click > Select **Send To > Add to User Label**



4. Select the label to assign the record/s to > **Click OK**

Removing From User Labels

1. Go to **Favourites > User Labels** and locate the record/s.
2. Right click > Select **Remove From > Remove from User Label**



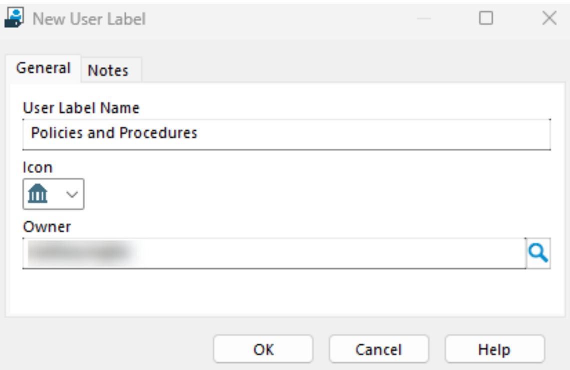
3. Select the label to remove the record/s from > **Click OK.**

Creating a New User Label

For Personal Use

1. Go to **Favourites > User Labels**
2. **Right click** in the whitespace and select **New > New Top Level Item**

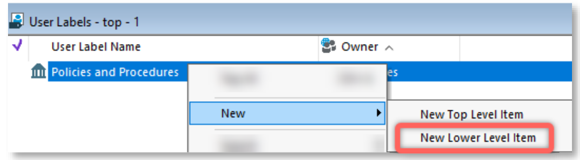
3. Give the label a name e.g. Policies and Procedures.
4. Select an icon to represent your label and **click OK**.



ⓘ By default, the user labels you create are only visible to you.

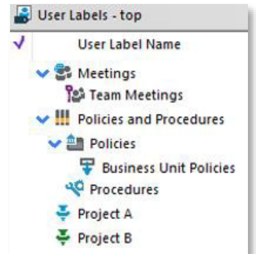
You can then create lower level labels to further categorise the information.

5. Right click on the Top Level > Select **New > New Lower Level Item**



6. Give the label a name and icon > Select OK

Continue to create more top and lower level labels as you require to create a meaningful information structure for quick access to the records you work with.



For Shared Team Use

User Labels can also be created and shared by a group of RAMS users so that records added to the group user label will be accessible by all team members.

1. Go to **Favourites > User Labels**
2. **Right click > New > New Top Level Item**
3. Give the label a name and icon.
4. Delete your name from the Owner field.
5. Click on the magnifying glass to search for and select the Team name.

6. **Select OK**.

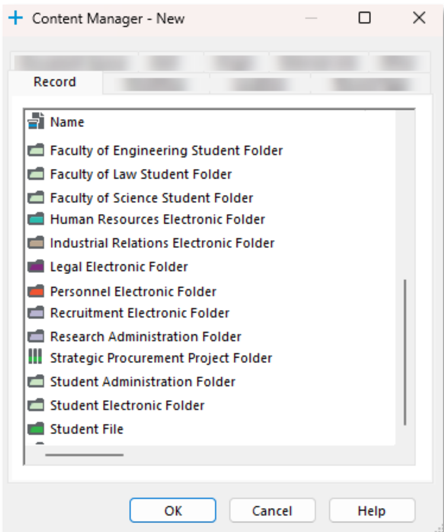
Creating New Folders

IMPORTANT!

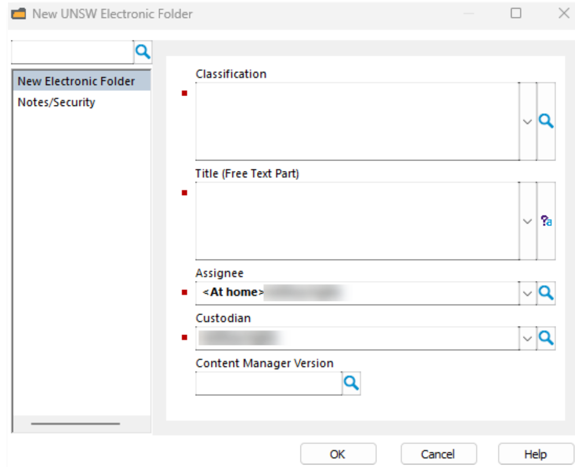
Before creating a new folder, always run a search in RAMS first to check that there is not already a suitable folder of the same name or topic that can be used.

1. From the Home ribbon select the plus sign (+).

2. In the New window scroll through the options, Select the appropriate **Record Type** for your new folder > select **OK**.



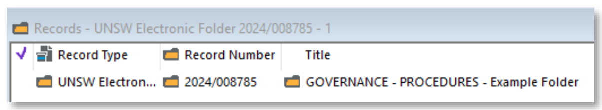
3. The New Record screen will appear, complete all relevant fields. Those marked with a red square (■) must be completed.



ⓘ The fields you will need to complete will change depending upon the record type you have selected in step 2.

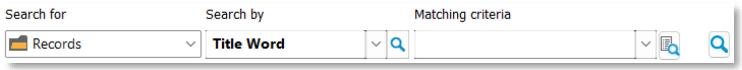
4. When all information has been completed, select **OK**.

The new folder will be displayed in a new RAMS window.



Quick Searching

Use the **Quick Search Bar** for single criteria searches.

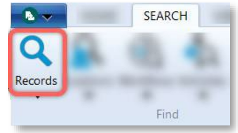


Setting	Definition
Search For	Set to **Records** to search for folders, sub-folders and documents.
Search By	Select a record property, or search method, to search on. For example, title word, creator, record number, date registered etc. Use the magnifying glass icon to search the list of available search methods.
Matching Criteria	Enter your search criteria. Use the arrow at the end of the field to select from the drop-down menu to select and run a recent search.
More Search Value Options	The options available in this window will depend upon what has been selected in the Search By field.
Run the Search	Select the magnifying glass to run the search.

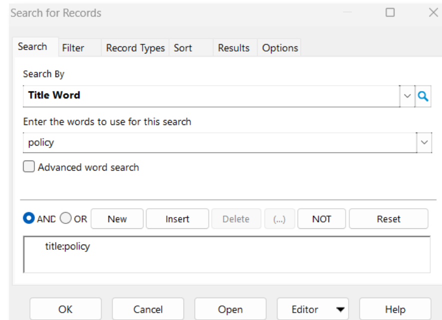
When the search has been run, results will be displayed in the **List Pane** below the **quick search bar.**

Advanced Searching

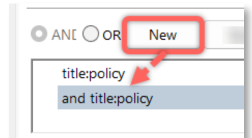
For searches with multiple criteria or advanced filtering is required, click the Find Records button on the **Search** ribbon.



1. Set the **search method** and enter your first criteria.



2. Select **New** to add the second search criteria.

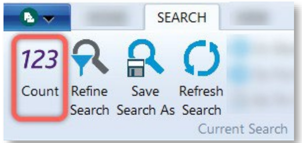


3. Change the search method and enter the second criteria

4. Click OK to run the search. Results will be displayed in the list pane.

Counting Search Results

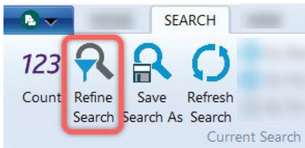
Before reviewing the search results, it is helpful to check how many records have been retrieved. From the **Search ribbon** select **Count**.



Refining Search Results

If your search returns too many results, you may want to refine the search to add extra criteria or filters to narrow the number of results.

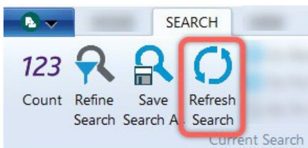
To refine a Search, click the **Refine Search** button on the **Search** ribbon. The advanced search window will reopen to display your current search.



Click the relevant line of your search if you would like to modify it, add additional search criteria, or add search filters.

Refreshing Search Results

Select Refresh Search to reload the search results of the current window.



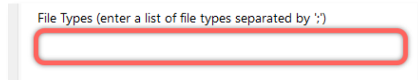
Filtering Search Results

Search results can be filtered to show a specific record type or file format.

This can be done when creating a new advanced search or when refining a current search.

Filtering by File Format

Click the **Filter** tab > Untick Use default filters.

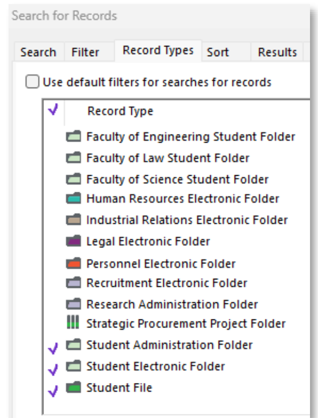


In the File Types field enter the file extension/s. For example .doc; .docx; .pdf; xlsx etc.

Filtering by Record Type

Click the **Record Types** tab > Untick Use default filters.

Untick the record types that you would like to remove from the search results > Click **OK** to run the search.



Commonly Used Search Methods

Search Method	Description
Title Word	Searches record titles for any matching results.
Any Word	Searches in the title and notes fields for matching results.
Document Content	Searches for matching text within the content of a document.
Notes Word	Searches for matching text in the notes field only.
Record Number	Searches the unique number assigned to a record.
Container	Search for documents within a specific folder.
Date Registered	The date the record was saved to RAMS.
Date Created	The date the document was written.
Creator	A search based on the person who registered the record to RAMS.

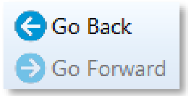
To access a complete list of Search Methods, click the **blue magnifying glass** icon at the end of the **Search By** field.

When the list displays, select **Alphabetica**l, then sort by **Caption** by clicking the Caption column header. This makes the list much easier to understand.

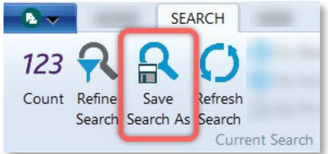
Searching Tips and Pointers

- An **asterisk (*)** wildcard can be used to replace multiple unknown characters. For example, Build* would return words such as Building, Builder, Builders, Builds, etc.
- The **question mark (?)** can be used to replace a single unknown character for example organi?ation would return results for organisation and organization.
- Put **quotation marks** (**“ ”**) around search terms to search for a specific phrase e.g. “Privacy Act”. This will search for the exact phrase as opposed to searching for Privacy Act which will retrieve results anywhere these words are in the title.
- To navigate to a previous search, you can click on the **Go Back** button on the **Search** ribbon.

  To return to last search click **Go Forward**.



- If you run the same search regularly, it can be saved to your favourites.

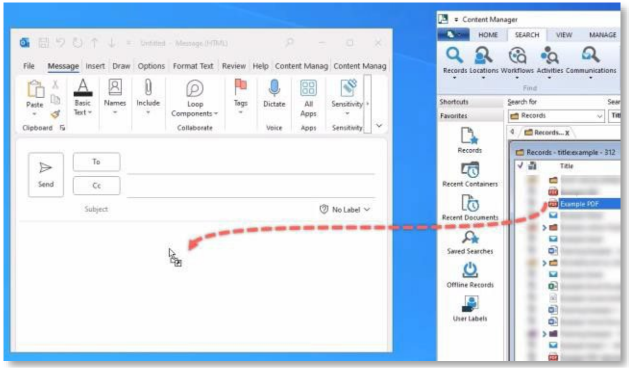


- **Dynamic Date Terms** are available to use on Date field searches.
  Examples: **Today, Yesterday, This Week, Previous Week, This Month, Previous Month, This Year**.

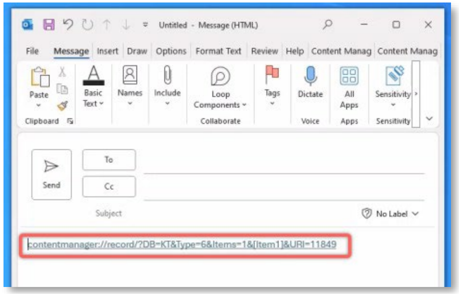
Sharing Records with Other RAMS Users

From a New Email

1. Locate the record in RAMS.
2. With the new email open, **left click** on the record. Keeping the left click button held down **drag and drop** the record into the email.

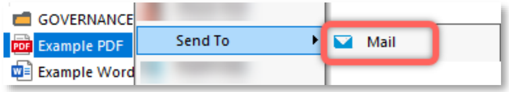


3. A hyperlink to the RAMS record will be embedded in the email.

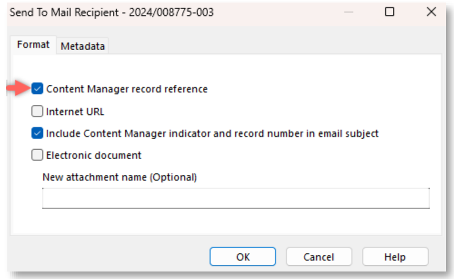


From RAMS

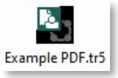
1. Locate the record/s in RAMS.
2. **Right click > Send To > Mail**

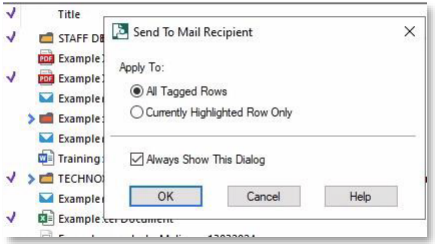


3. **Tick** *Content Manager record reference* > Select **OK**



4. A .tr5 link will be attached to a new email.





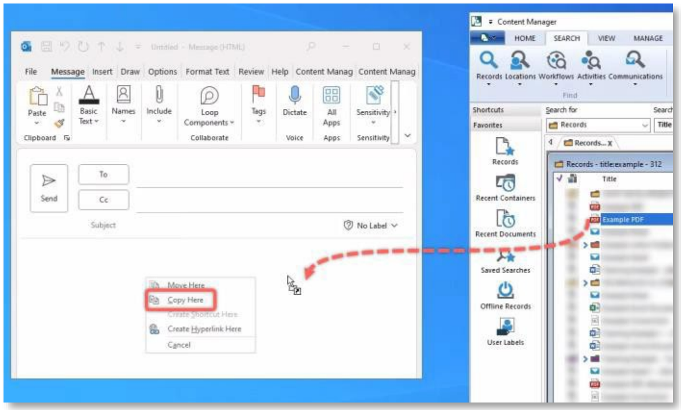
ⓘ You can select multiple records (both folders and documents) when using this method.

Tick all records to send **> Right click > Send To > Mail > OK**

Sharing Records with Non-RAMS Users

From a New Email

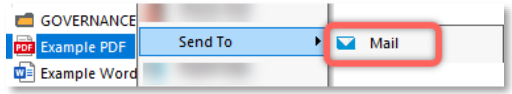
1. Locate the record in RAMS.
2. With the new email open, **right click** on the record. Keeping the right click button held down **drag and drop** the record into the email.
3. Select **Copy Here**.



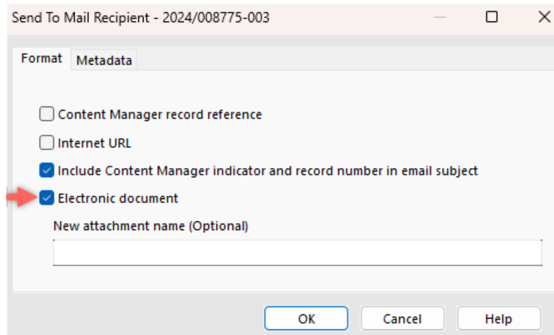
4. An electronic copy of the record will be attached to the email.

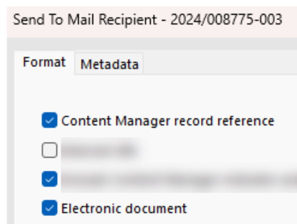
From RAMS

1. Locate the record/s in RAMS.
2. **Right click > Send To > Mail**



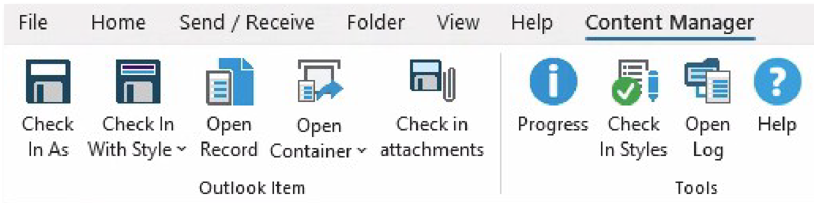
3. **Tick *Electronic document* >** Select **OK**





ⓘ If you are sending the record to both internal and external people you can tick both the Content Manager record reference and Electronic document options for both types of attachment to be included.

Outlook Content Manager Ribbon Tab



Check In As
Click to Check In a new email (You will be prompted to select the Record Type)

Check In With Style
Click to Check In an email with a style (You will be prompted to select the Check In Style)

Open Record
Open the email in RAMS (Only for emails that are already saved to RAMS)

Open Container
Open the folder the email is saved into RAMS (Only for emails that are already saved to RAMS)

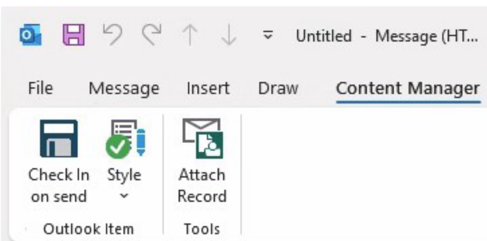
Check In Attachments
Click to Check In only the email attachments and not the email message. (You can save all or selected attachments)

Progress
Click to display the RAMS new record registration progress panel.

Check In Styles
Click to manage Check In Styles (pre-defined record properties that can be selected when checking-in emails)

Outlook New Email Content Manager Ribbon

This ribbon is available from the New email window.



Check In on Send	Select to register the record to RAMS after sending.
Style	Choose a Check In Style for checking in on send.
Attach Record	Search RAMS for records to attach to the email.

Check In Styles

Check In Styles are sets of pre-defined record properties that can be selected when checking-in emails to save time. Some record properties that you can predefine are the Record Type, Container, Alternative Container, Addressee, and Author.

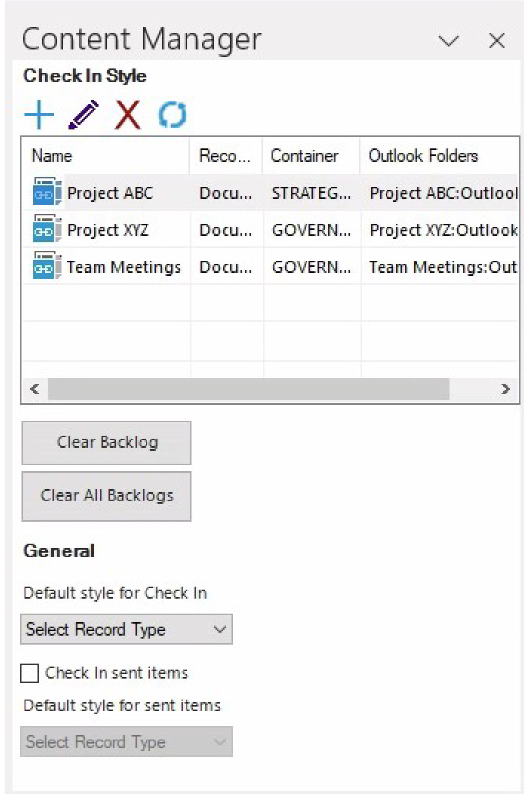
Check In Styles can also be linked to email folders so that when emails are dropped into the Outlook sub-folder with a linked Check In Style, the RAMS Check In Style will be triggered.

Managing and Applying Check In Styles

Check In Styles are accessed from the Content Manager ribbon of Outlook.

You will be able to create and manage your Check In Styles from here.

- Create a **New** Check In Style
- **Edit** an existing Check In Style
- **Delete** a Check In Style



Check In Style tools

Check In Styles that have been created.

In bulk check in items within the selected folder.

In bulk check in items within all linked folders.

Set a style as a default for when you click Check In As.

Automatically check in an Outlook Item when it is sent using the default style.

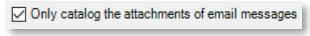
Set a style as a default for when you click Check In On Send.

Creating a Check In Style

1. From the Content Manager ribbon selected **Check In Styles**.
2. Click the **blue plus icon.**
3. Give the Check In Style a **Name** (e.g. Payroll Emails or Project XYZ).
4. Select the **Record Type** for your Check In style (this is mandatory).
5. If required, fill in the relevant proprieties for your new Check In Stye (**Container, Alternative Container, Addressee**).
6. If required, fill in **the Set Default Author Option** (using the drop-down shortcuts OR enter a **Specific Author.**
7. Configure the following boxes for each new style as you require. You can have all, some or none of these ticked.

The check in dialog box is the new record form where you normally enter the record Title and File Number. If you do not check this tick box, the record title will be set to the text in subject line (not recommended to untick).

Tick this box if you would like the email to be moved to the Deleted Items after email checks-in to RAMS.



Tick this option if you would like only attachments to be checked in when using this Check In Style.

8. To link to an Outlook folder (if required) select **Add**, navigate to and select the folder > click **OK.**
9. Click **OK** to save the new check in style.

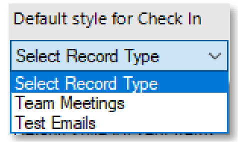
Automatically Check In sent items

On the Check In Style pane there is a tick box '**Check In sent items'** ticking this box will ensure that whenever you send a new email message, RAMS will prompt you to save the email by opening the New Record form.

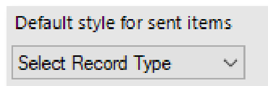
Setting Default Check In Styles

You can set one of your Check In Styles as the default style. This means when you click **Check In As** it will automatically trigger that Check In Style.

On the Check In Style pane, use the drop down menu under **Default Style for Check In** to select a style to make the default.



You can also set a default style for your sent items using the **Default Style for sent items** drop down menu to select the default style.



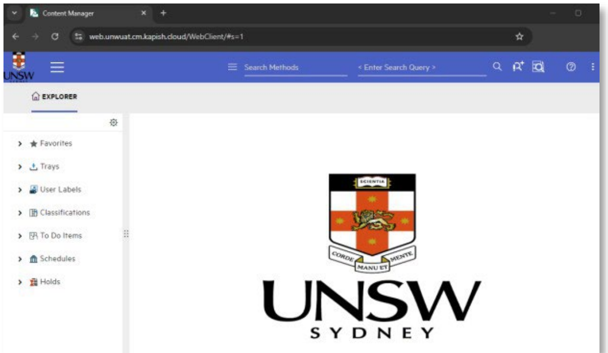
RAMS Online

Web client is the web-based interface for RAMS. If you cannot connect to the UNSW network to access the desktop client or you use a MAC PC, you can use web client for access to RAMS.

Accessing the RAMS Web Client

1. Open a web browser and enter the following URL: https://web.unwprd.cm.kapish.cloud/

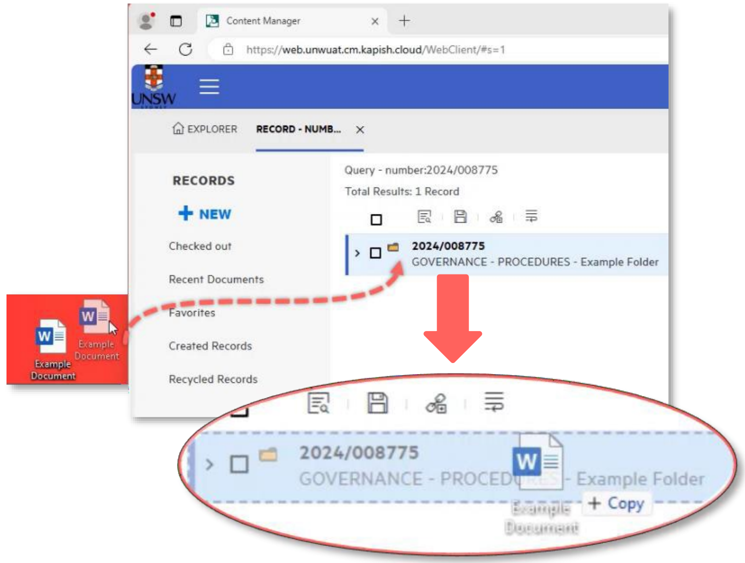
2. The UNSW RAMS web client will open.



Adding Records

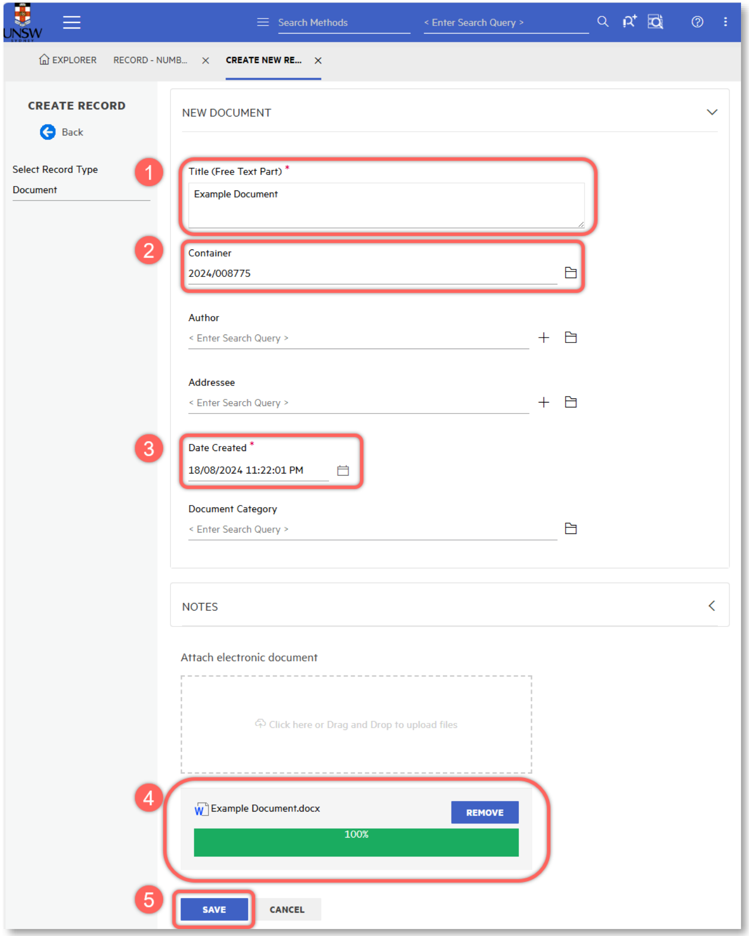
1. Locate the folder in RAMS to save the record to.

2. Left click on the record from the file location and drag and drop it onto the folder.



3. Complete the relevant fields on the **New Document form >** Select **OK**.

See the next page for a breakdown of the New Document fields.

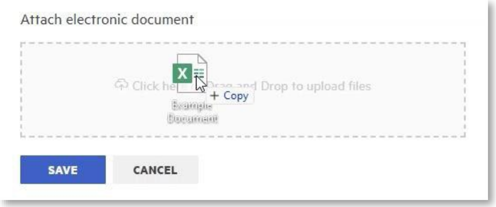


1. **Title**
   Enter the title of your record using the UNSW standard naming and titling convention.

2. **Container**
   This field will prefill with the folder number based on the folder you dropped it on top of.
   If you have selected the wrong folder, click on the folder (🗀) at the end of the field to search for the correct folder.

3. **Date Created**
   Enter the date the document was written.
   This field will auto populate with today's date, but you can change the date by clicking on this filed and typing a new date.

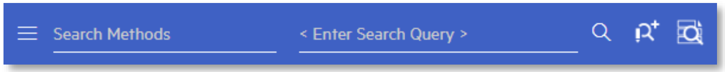
4. This the electronic record you are about to save.
   If you have uploaded the incorrect document, select REMOVE and drag the correct one into the *Attach electronic document* box.

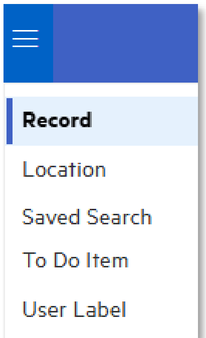
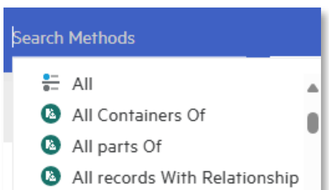
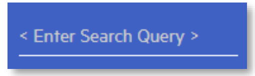
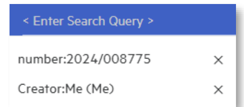


5. When all relevant fields are complete, select Save to add the record to RAMS.

Searching the Web Client

To search for records on the web client, use the search bar in the top right corner of the window.



Search Setting	Setting Purpose
	The three bars menu icon will allow you to select the object type you are searching for. This will always default to Record.
	Set the method/field you want to search on. For example, Title, Record Number, Date Registered etc. You can start typing the name of the fields and matching method will be shortlisted.
	Enter the search terms/criteria that you are looking for. When you select this field, it will display your recent searches that you can select from to run the search again. 
	The magnifying glass will run the search query you have entered.
	This is the search editor which allows you to manually build multi-criteria searches.
	The Search Forms button provides preset advanced search templates to assist in building multi-criteria searches.