

## RAMS 9.4—Quick Start Guide—The Interface

### File Management Function Group

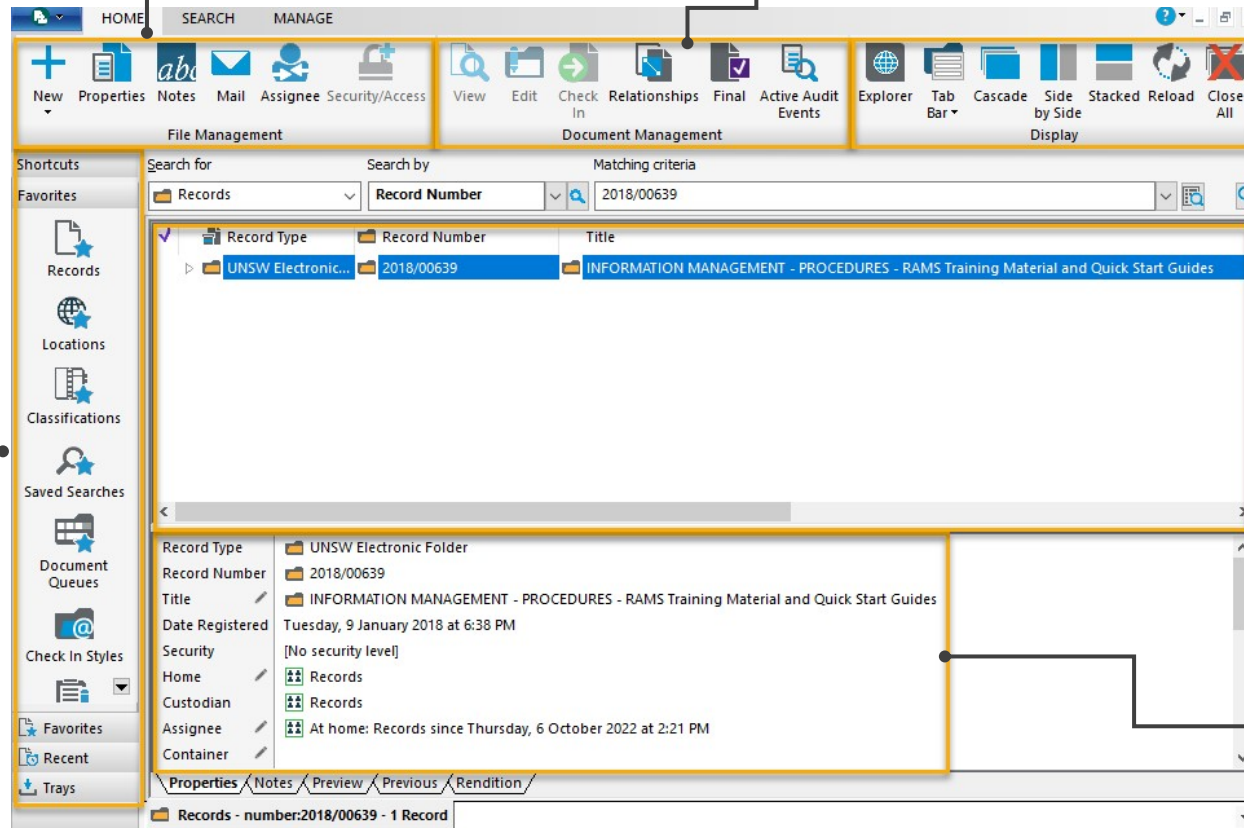
This section contains essential File Management functions such as container creation (+Record icon), or adding notes to records. For further information see Page 3.

### Document Management Function Group

View, edit, check in, relate or finalise document properties. For further information see Page 3.

### Your Trays

Keep information that you constantly access in your Favourites or Work Tray.



The screenshot displays the RAMS 9.4 interface. At the top, there are tabs for HOME, SEARCH, and MANAGE. Below these are two main function groups: File Management (containing icons for New, Properties, Notes, Mail, Assignee, Security/Access, View, Edit, Check In, Relationships, Final, Active Audit, Events) and Document Management (containing Explorer, Tab Bar, Cascade, Side by Side, Stacked, Reload, Close All). A search bar is visible with 'Records' selected, 'Record Number' as the search criteria, and '2018/00639' as the search term. The List Pane shows a table with columns for Record Type, Record Number, and Title. The View Pane displays detailed metadata for the selected record, including Record Type (UNSW Electronic Folder), Record Number (2018/00639), Title (INFORMATION MANAGEMENT - PROCEDURES - RAMS Training Material and Quick Start Guides), Date Registered (Tuesday, 9 January 2018 at 6:38 PM), Security ([No security level]), Home (Records), Custodian (Records), Assignee (At home: Records since Thursday, 6 October 2022 at 2:21 PM), and Container (Records). The bottom status bar shows 'Records - number:2018/00639 - 1 Record'.

### Display Options

Choose how multiple search tabs are displayed.

### List Pane

You can sort each of the columns available. You can add new columns.

### View Pane

Provides specific details of the record selected in the list pane.

\*\*\*You can edit metadata values where there is a pencil icon

## RAMS 9.4—Quick Start Guide—The Interface—Search Tab

### Find Records Function Group

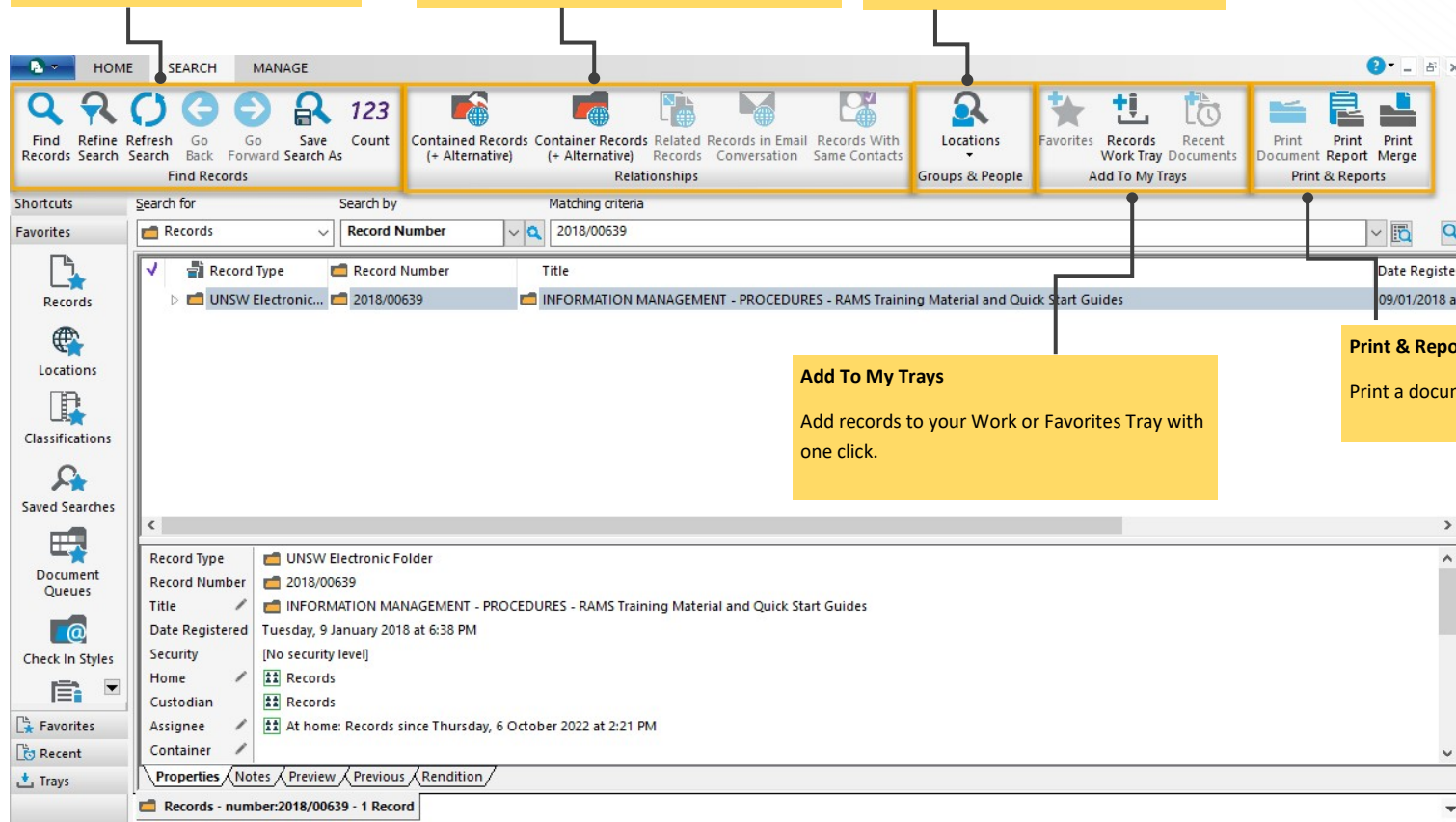
Quick access to the most popular search options. Simplify your work by saving your searches.

### Relationships & Navigation Group

Identify and access records which relate to the files you are working with.

### Organisation & People

Locate people via the UNSW Organisational Structure and the external name and address register.



The screenshot shows the RAMS 9.4 Search Tab interface. The top navigation bar includes 'HOME', 'SEARCH', and 'MANAGE'. The 'SEARCH' tab is active, displaying a toolbar with icons for 'Find Records', 'Refine Search', 'Refresh Search', 'Go Back', 'Go Forward', 'Save Search As', and 'Count' (123). Below the toolbar are three main function groups:

- Find Records Function Group:** Includes 'Find Records', 'Refine Search', 'Refresh Search', 'Go Back', 'Go Forward', 'Save Search As', and 'Count'.
- Relationships & Navigation Group:** Includes 'Contained Records (+ Alternative)', 'Container Records (+ Alternative)', 'Related Records', 'Records in Email Conversation', and 'Records With Same Contacts'.
- Organisation & People:** Includes 'Locations Groups & People', 'Favorites', 'Records Work Tray', and 'Recent Documents'.

Below these groups are 'Print & Reports' options: 'Print Document', 'Print Report', and 'Print Merge'.

The main search area shows a search for '2018/00639' in the 'Record Number' field. The results table is as follows:

Record Type	Record Number	Title	Date Registered
UNSW Electronic...	2018/00639	INFORMATION MANAGEMENT - PROCEDURES - RAMS Training Material and Quick Start Guides	09/01/2018 a

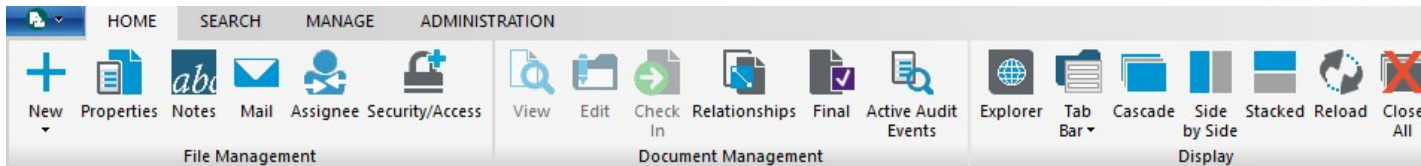
Below the table is a 'Properties' pane for the selected record:

- Record Type: UNSW Electronic Folder
- Record Number: 2018/00639
- Title: INFORMATION MANAGEMENT - PROCEDURES - RAMS Training Material and Quick Start Guides
- Date Registered: Tuesday, 9 January 2018 at 6:38 PM
- Security: [No security level]
- Home: Records
- Custodian: Records
- Assignee: At home: Records since Thursday, 6 October 2022 at 2:21 PM
- Container:

Callout boxes provide additional information:

- Add To My Trays:** Add records to your Work or Favorites Tray with one click.
- Print & Reports:** Print a document or the details of a record.

## RAMS 9.4—Quick Start Guide—The Interface—Functions



### File Management:

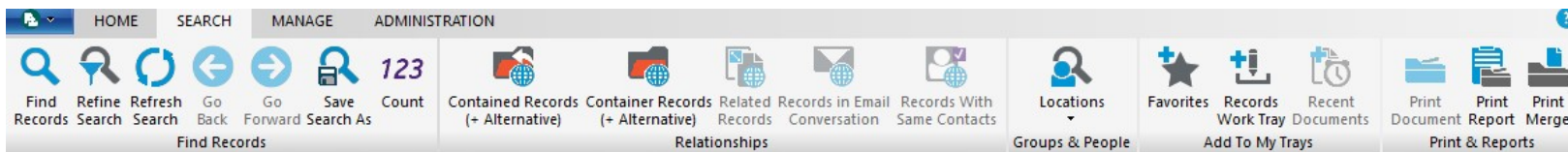
**Record:** Create new records  
**Properties:** Update or correct records  
**Notes:** Review or add notes  
**Mail:** Send record link via email  
**Assignee:** Change the assignee of a record  
**Security/Access:** View access controls of a record

### Document Management

**View:** View electronic documents  
**Edit:** Make changes to electronic documents  
**Check In:** Update electronic documents from a copy stored in the network drive or local desktop  
**Relate:** create a relationship between records  
**Finalise Document:** Make documents read only  
**Active Audit Events:** View a list of previous changes to a document

### Display

**Explorer:** A different way of accessing your Favourites, Worktray  
**Tab Bar:** Choose to view tabs on top or bottom  
**Cascade:** Window Arrangement  
**Side by Side:** Window Arrangement  
**Stacked:** Window Arrangement  
**Reload:** Refreshes current connection to production database  
**Close All:** Closes all active windows



### Find Records

**Find Records:** Opens search window  
**Refine Search:** Modify your current search result  
**Refresh Search:** Re-runs current search  
**Go Back/Go Forward:** Move between search results (multiple criteria searches)  
**Save Search As:** Save current search  
**Count:** Count search result

### Relationships

**Contained Records (+ Alternative):** Lists all records within a folder/box  
**Container Record (+ Alternative):** Retrieves the container that a document or folder is inside of.  
**Related Records:** Retrieves records related to a document or a folder

### Group & People

Search for UNSW Staff or External Contacts

### Add to my Trays

**Add to Favorites:** Adds a record to the favorites tray  
**Add to Work Tray:** Adds a record to the work tray  
**Add to Recent Documents:** Adds a document to the Recent Documents tray

### Print & Reports

**Print Document:** Allows you to print electronic documents  
**Print Report:** Allows you to print selected record metadata