RAMS 9.4—Quick Start Guide—The Interface
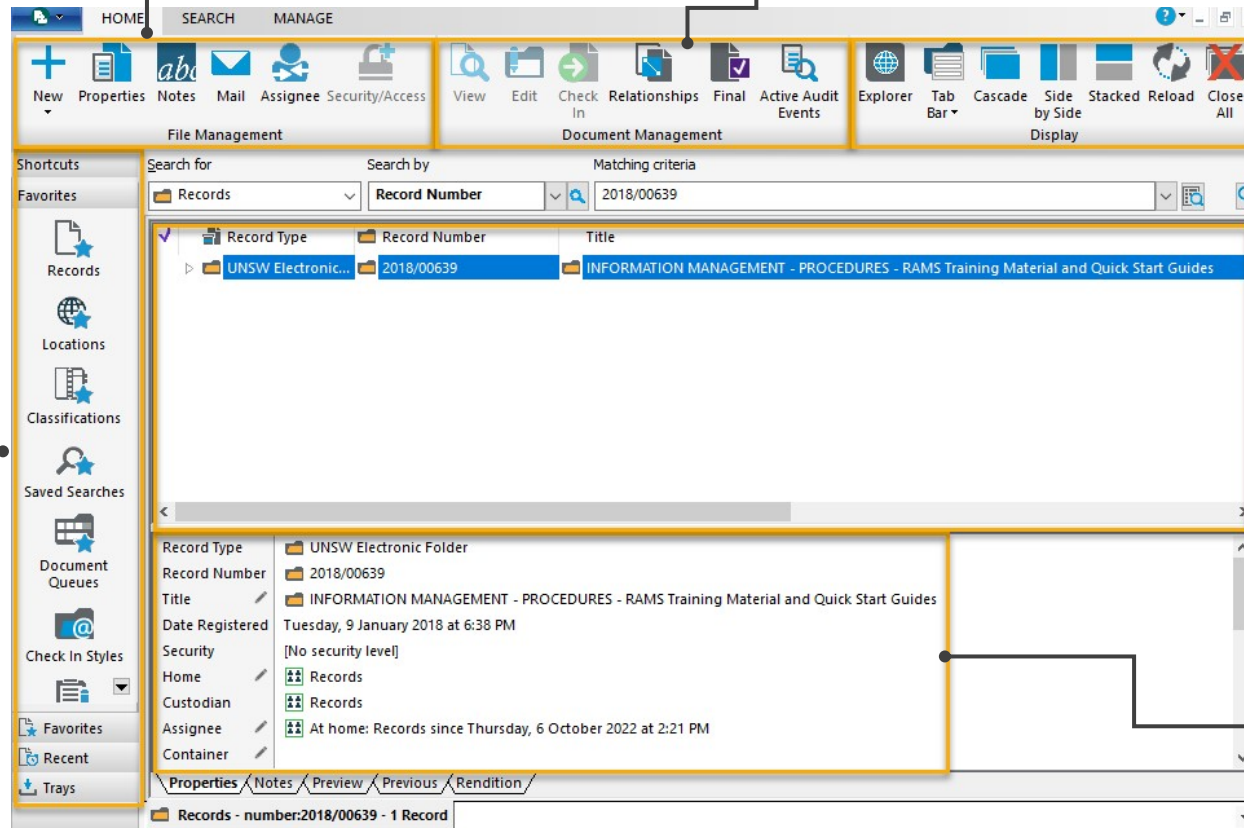
File Management Function Group

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.

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

Interface screenshot showing HOME, SEARCH, MANAGE tabs with File Management (New, Properties, Notes, Mail, Assignee, Security/Access), Document Management (View, Edit, Check In, Relationships, Final, Active Audit Events), and Display (Explorer, Tab Bar, Cascade, Side by Side, Stacked, Reload, Close All) function groups. Shortcuts panel includes Favorites: Records, Locations, Classifications, Saved Searches, Document Queues, Check In Styles. Search for: Records, Search by: Record Number, Matching criteria: 2018/00639.

Record list showing: Record Type UNSW Electronic..., Record Number 2018/00639, Title INFORMATION MANAGEMENT - PROCEDURES - RAMS Training Material and Quick Start Guides.

View pane details:
- 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

Tabs: Properties, Notes, Preview, Previous, Rendition

Records - number:2018/00639 - 1 Record

RAMS 9.4—Quick Start Guide—The Interface—Search Tab
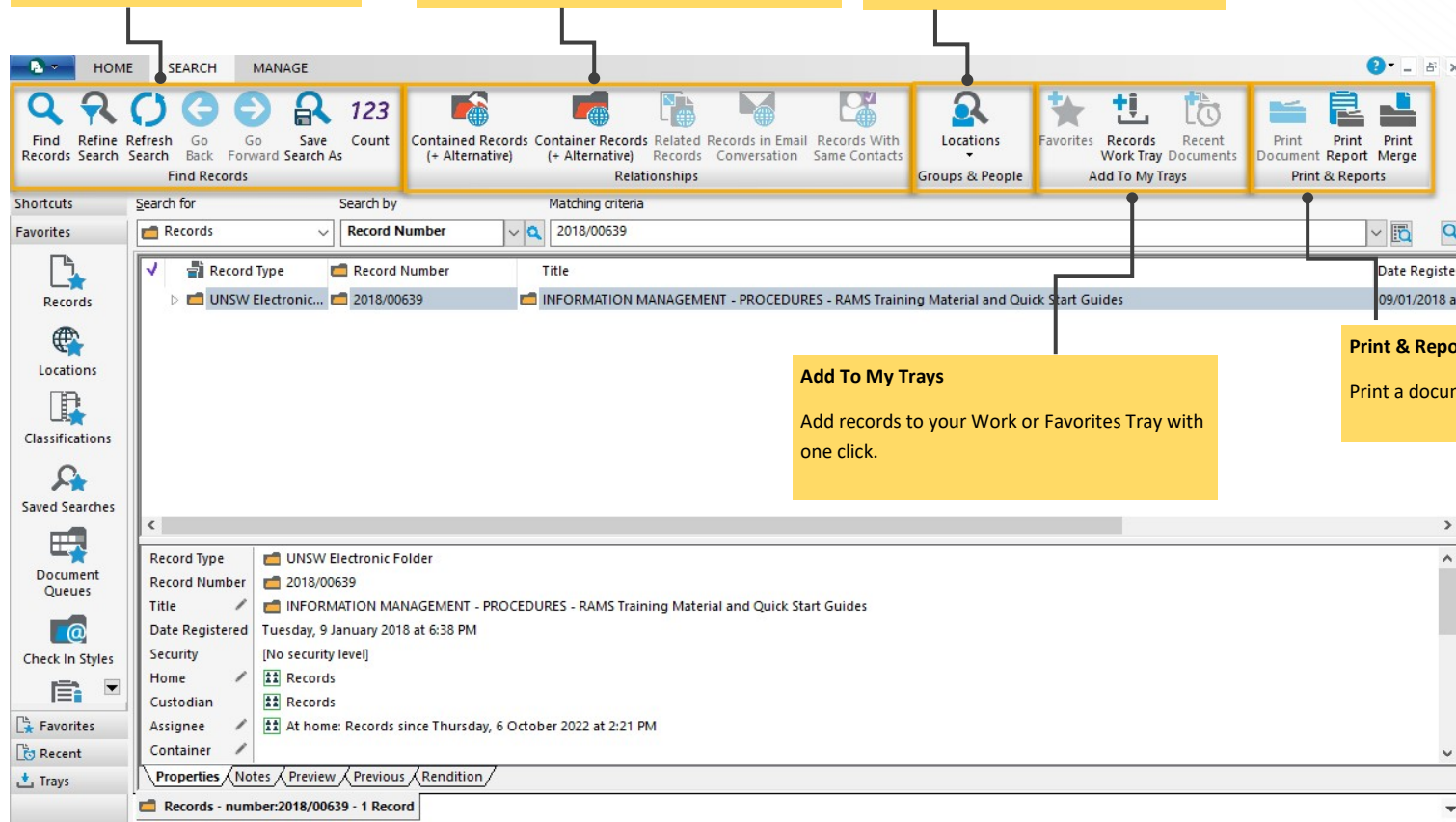
Find Records Function Group

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.

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
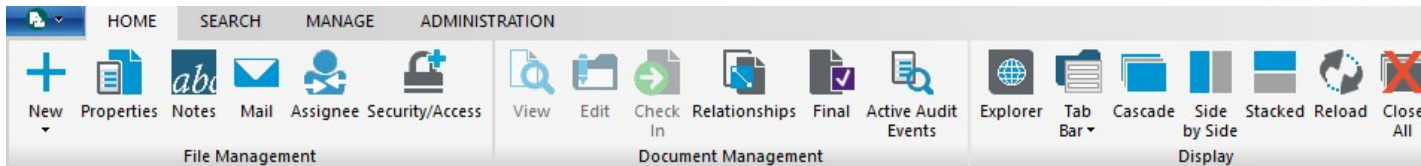
File Management:

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
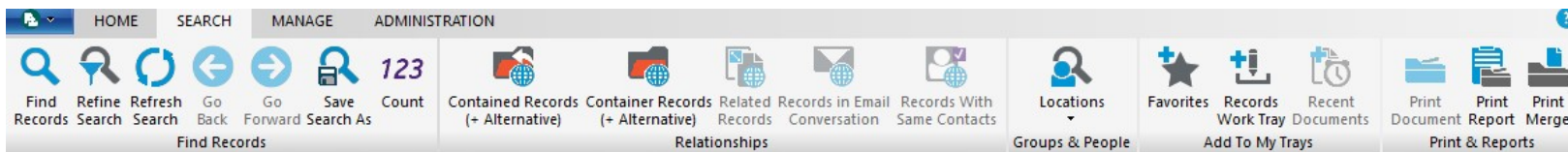
Find Records

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