Records and Archives Office

TRIM Context WebDrawer User Guide

A guide for UNSW staff on using TRIM Context WebDrawer

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Introduction

Trim Context Web Drawer is the web browser access to the TRIM database for records management, allowing users to search registered UNSW TRIM files without requiring the full TRIM Context client to be installed on their desktops.

Web Drawer has limited functionality but is a useful tool for basic file operation such as searches and requests. This is a brief guide on how to use the functionality of Web Drawer.

For more detailed information, please contact the Records and Archives Office.

Accessing WebDrawer

- Open your usual web browser
- Enter the URL http://trim.unsw.edu.au/webdrawer/
- The following page should appear on your screen.

Figure 1

- If prompted enter your username and password, this is your zPass.
The left hand side of the Web Drawer page gives the user several options as seen in Figure 2.

The main features for the user are:

1. The ‘Search’ takes the user back to the Advanced Search Screen, as seen in figure 1.
2. The ‘In Tray’ enables you to create a shortcut to records that you may regularly need to access/request.
3. The ‘Due Tray’ can be used for records requiring action.
4. ‘Quick Search’, for simple searching. (See the section on Searching)
5. ‘Location Search’ for performing a quick search on ‘Locations’.

Locations

A search can be performed on the physical locations of records, such as:

- Records
- University Archives
- Repository

By double clicking on the location, information about the location is retrieved. A search can then be undertaken for records stored in that location. See figure 3.
Searching

TRIM Context WebDrawer offers you two types of searching.

1. Quick Search, and
2. Advanced Search.

Quick Search

On the left hand side of the WebDrawer page in Figure 1 is the Quick Search function. This will allow you to search for words appearing in the **record title field only**. To perform a quick search:

- Enter one or more search terms in the **Quick Search** text box.
- Click on the **Quick Search** button or hit the enter key on the keyboard.

A list of records containing your search terms in the title will be displayed.

You can perform a ‘Wildcard’ search within Quick Search i.e.; Claim* will find all records with ‘Claim’, ‘Claims’ or ‘Claiming’ in the title. However, the wildcard search may retrieve quite a lot of records and it may be more efficient to be more specific wherever possible.

If more than one search term is entered, only those records containing **all** terms in their titles will be returned.

Your search terms are displayed at the top of the search results screen, see below.

Advanced Search

A WebDrawer advanced search enables you to perform a search of the TRIM Context database using up to three search terms and combining these terms using the **AND/OR** options, as shown in Figure 1.

To perform this search:

- Select the **Search for** drop down menu and select the appropriate option from the list e.g. ‘Title Words’.
  - You may select up to three (3) types of search criteria.
- In the **Equal to** box enter the word, number etc you wish to search for.
- Select **AND** if the results of the search must contain all the search terms you have used.
- Click **OR** if you would like to display records that contain at least one the search terms you have used.
- Use the **RESET** button to clear the screen to enter different terms or select different search criteria.

The advanced searching option also allows you to sort your list of retrieved records. To do this:

- Select from the drop down list, for example, **‘Record Number’**.
- Select the descending box next to the sort criteria if you wish to sort the criteria in descending order.

You can choose up to three (3) sort criteria to sort your results.

The **‘Records per page’** field allows you to change the number of records that will be displayed on the screen when you have executed a search. The default is 25.

Select the **‘Count Results’** box display the number of records that you have retrieved from your search.

The number of records retrieved is displayed at the top of the search results screen. Refer to Figure 2.
Date Formats

The date format to be used when searching on dates is: **DD/MM/YY**

Searching by date registered, for example, allows you to search a range of values. Use a comma between to designate between values. For example, 10/01/08, 10/02/08

Saving Searches

Do you have a search you perform often?

It is possible to save a frequently used search as a bookmark in your web browser. When you select your bookmark Web Drawer will perform the search and return your results.

Navigating between searches

When in WebDrawer, use the browser arrows to move back screens to your original search. Your search criteria will be retained and the search can be refined if required.

If you select ‘Search’ from the left hand tool bar the search screen will be refreshed and your original search criteria lost.

Similarly if you select ‘Reset’ your search will be refreshed.
Search Results

Viewing Detailed Search Results

When you have executed your search and your search results have been displayed, see Figure 2, you can view the details of record by:

- Double clicking on the record to see the record details. Figure 3 shows the screen that will be displayed
- The detailed search results screen provides you with information regarding the record’s number, title, location, notes that have been attached, previous or later parts, related records and contained records.

Record Request Feature

To request a record:

- Scroll down the file identification page; see Figure 3, until you reach ‘All Record Request’. This feature allows you to request a file from ‘Records’, University Archives’ or ‘Repository’.
- Double click on ‘Place a new Request’ or ‘Place another request’, if there is a request pending.
• Your request will be sent straight to Records staff and will be processed within 24 hours. Chancellery staff can expect the file to be delivered on the next file delivery scheduled each day between 10.30am to 11.00am.
• Once your request if entered, you will receive the following confirmation screen.

FIGURE 6

When you require a file that is assigned to another staff member it is your responsibility to liaise with the member of staff regarding access to the file. If the file is transferred to you it is your responsibility to inform the Records and Archives Office so they can record the new location of the file in the TRIM database.
Navigation links to other file parts are located in the ‘Record Detail’ screen under PARTS. See Figure 6. These allow UNSW users to locate previous and subsequent parts (volumes) of the selected file.

To do this, simply click on the ‘Latest Part’ (if the records has a later part created) or ‘First Part’ (if the record has an earlier part), to see the details for these parts.

The same can be done with ‘Related Records’.

**FIGURE 7**

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**Further Information**

For further information on using TRIM Context Web Drawer, please contact the TRIM Administrator in the Records and Archives Office.

For complex searches where TRIM Web Drawer is not adequate, you may contact the Records and Archives Office who are able to produce more detailed inventories of files held by each unit and other reports.