

## 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.

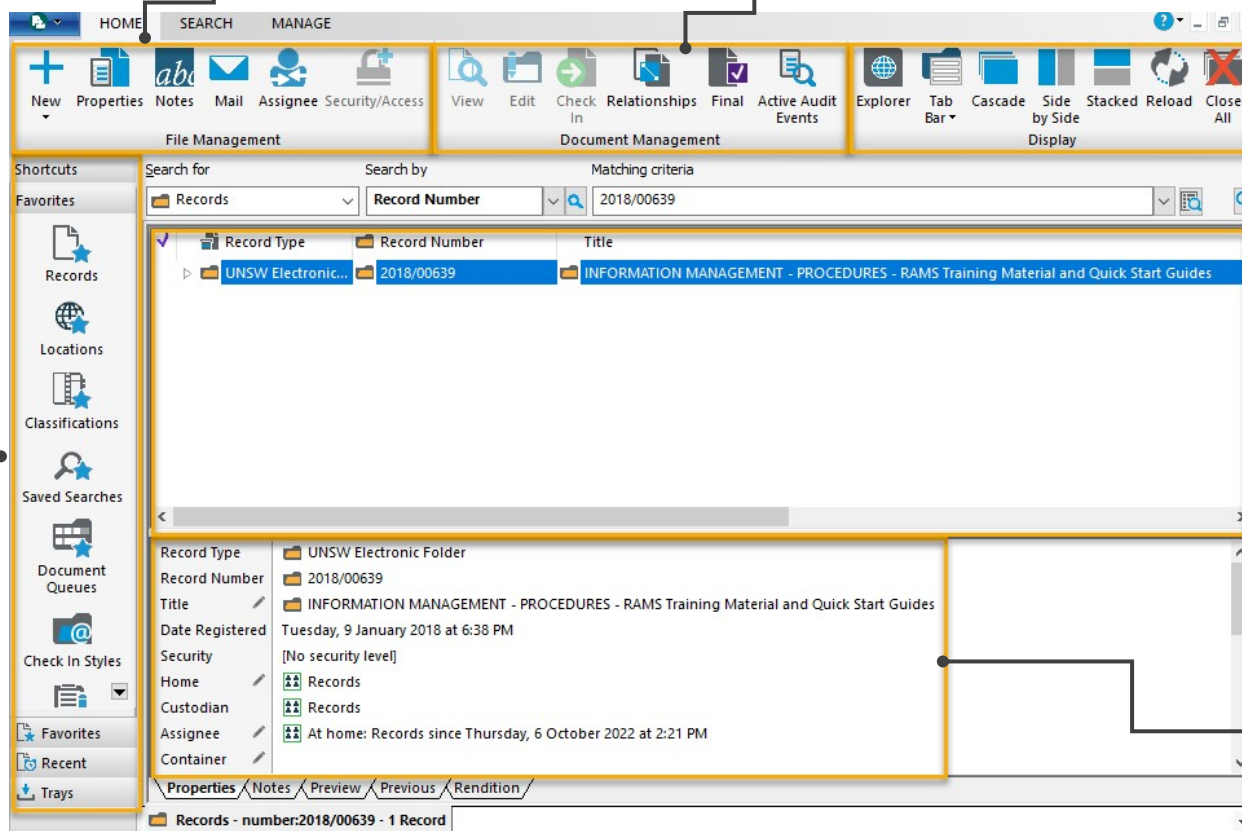
### List Pane

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



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

### Find Records Function Group

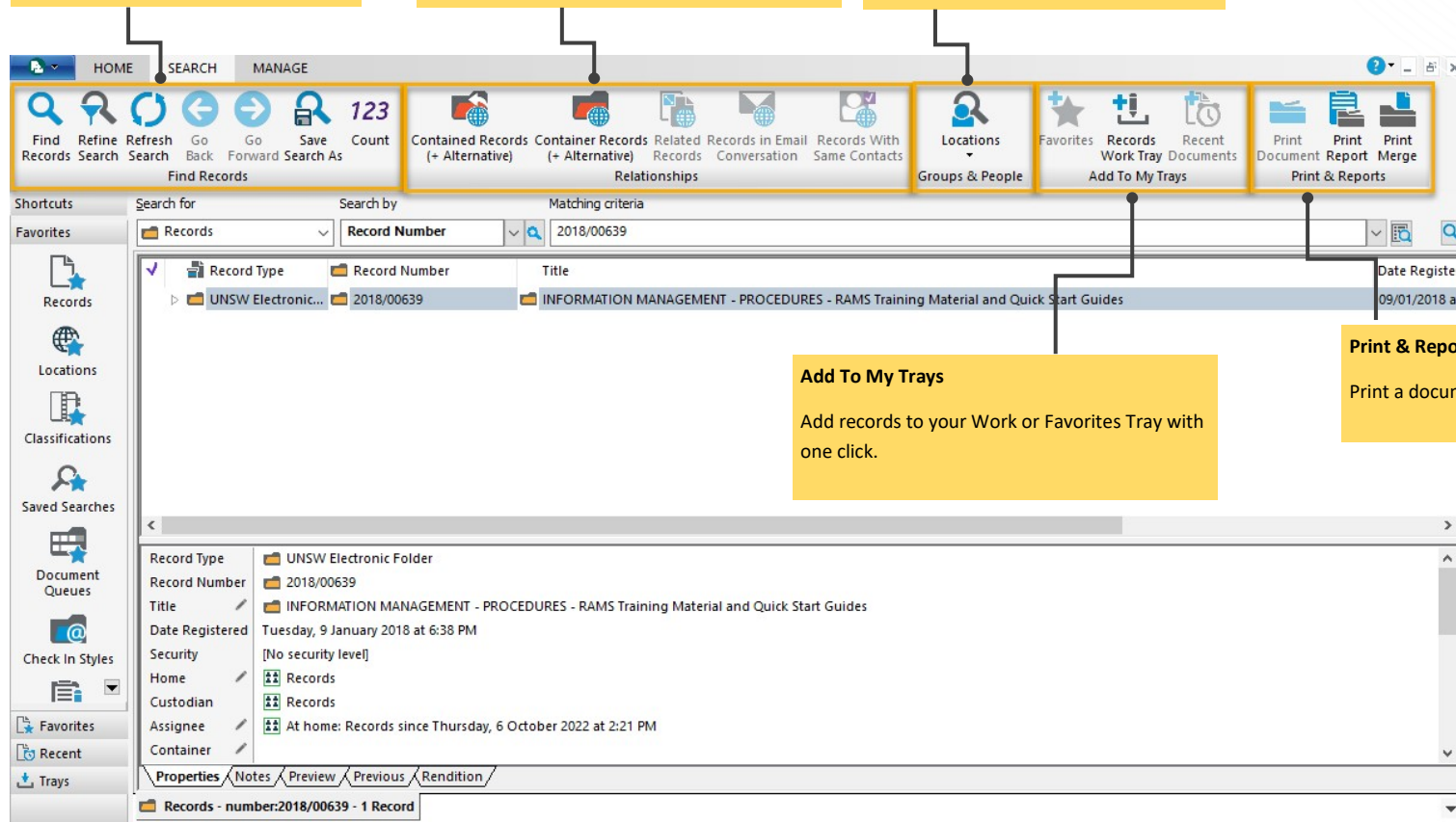
Quick access to the most popular search options. Simplify your work by saving your searches.

### 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 tabs for 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, there are sections for Shortcuts, Favorites, and a search results table. The search results table shows a single record with the following details:

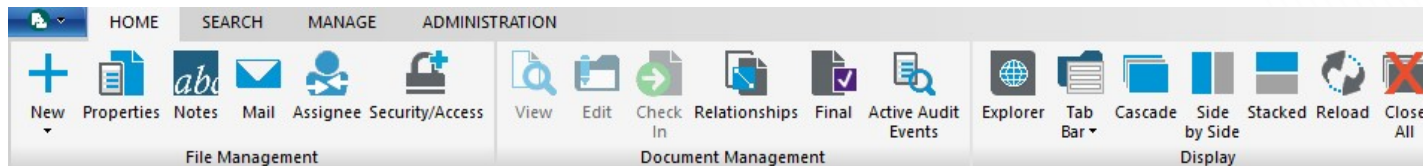
Record Type	Record Number	Title	Date Registered
UNSW Electronic...	2018/00639	INFORMATION MANAGEMENT - PROCEDURES - RAMS Training Material and Quick Start Guides	09/01/2018 a

Below the search results table, there is a section for Record Properties, including Record Type, Record Number, Title, Date Registered, Security, Home, Custodian, Assignee, and Container. The bottom of the interface shows a tabbed view with Properties, Notes, Preview, Previous, and Rendition. The current view is Properties, showing details for the record 2018/00639.

Callouts in the image point to the following features:

- Find Records Function Group:** Points to the Find Records, Refine Search, Refresh Search, Go Back, Go Forward, Save Search As, and Count (123) icons.
- Relationships & Navigation Group:** Points to the Contained Records (+ Alternative), Container Records (+ Alternative), Related Records, Records in Email Conversation, and Records With Same Contacts icons.
- Organisation & People:** Points to the Locations, Groups & People, Favorites, Records Work Tray, Recent Documents, Add To My Trays, Print Document, Print Report, and Print Merge icons.
- Add To My Trays:** Points to the Add To My Trays icon.
- Print & Reports:** Points to the Print Document, Print Report, and Print Merge icons.

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



### File Management:

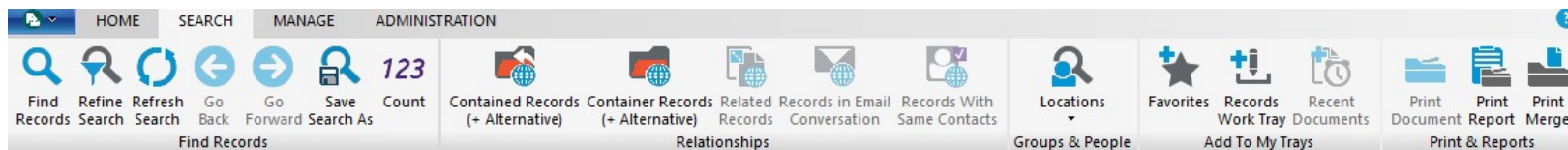
Record: Create new records  
Properties: Update or correct records  
Notes: Review or add notes  
Mail: Send record link via email  
Assignee: Change the assignee of a record  
Security/Access: View access controls of a record

### 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