Records & Archives - Getting Started with RAMS 9.4

This document outlines the basic functions of RAMS (Records & Archives Management System), the University's corporate recordkeeping system. More information can be found on our website recordkeeping.unsw.edu.au or by contacting Records & Archives.

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CRICOS Provider Code 00098G

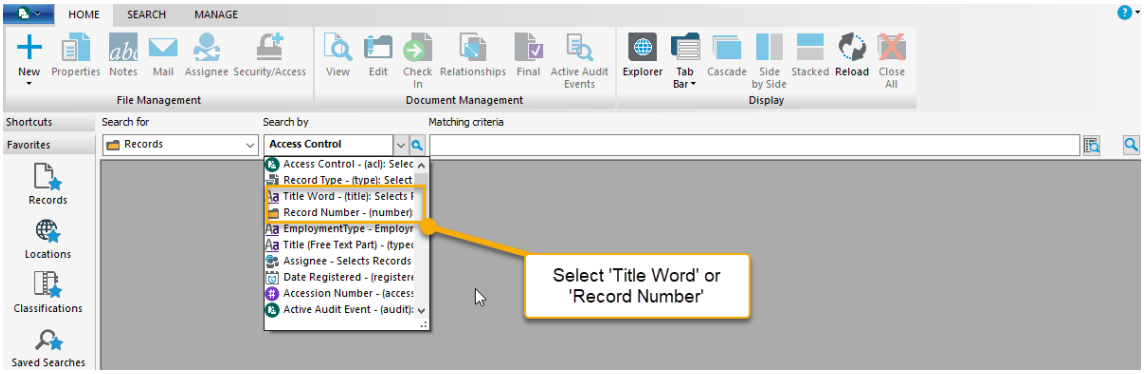
Searching records

You can search for records using almost any piece of metadata in RAMS. You can also search by document content in electronic documents.

An asterisk (*) can be used as a wild card at the end of searches, e.g. test* will show ‘test’, ‘tests’, ‘testing’, etc.

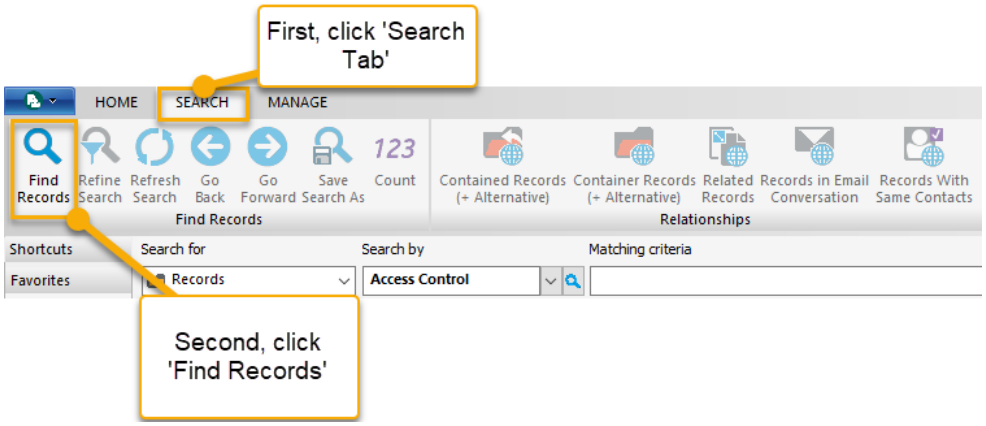
1. Perform a quick search

The Quick Search Bar is always visible in RAMS and can be used for simple searches. Select what you want to **Search by** and type what you’re searching for in the **Matching criteria** field. Hit **Enter** to run the search.

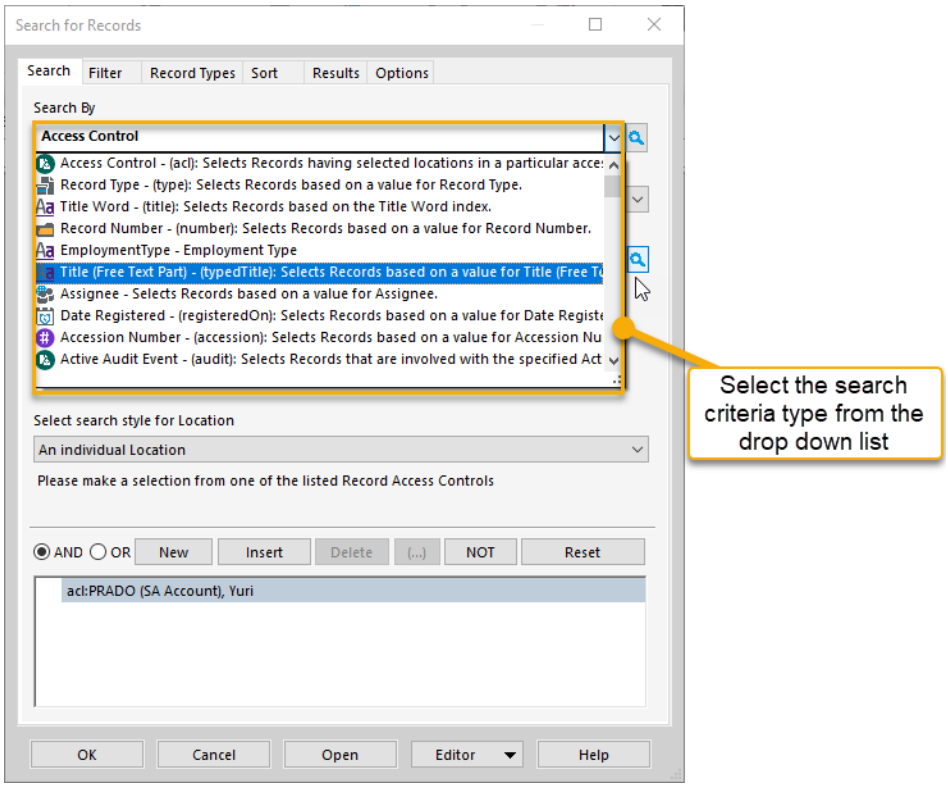


2. Complete more complex searches

We can use the Search Toolbar for more complex searches. Select the **Search** tab and click on **Find Records**.

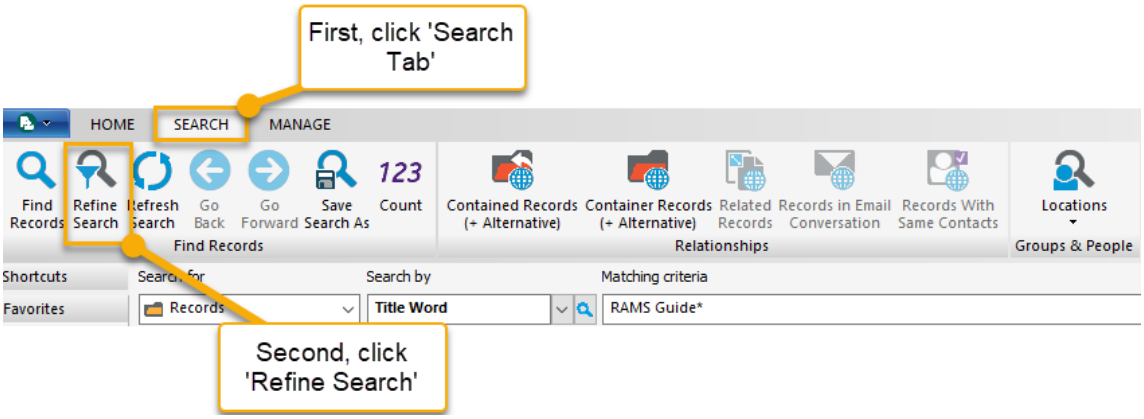


Select what you want to **Search By** and type what you’re searching for in the **Matching criteria** field. You can also include multiple clauses by selecting **New**. You can find additional criteria by selecting the blue folder icon (📁) beside the Search By field. Click **OK** to run the search.



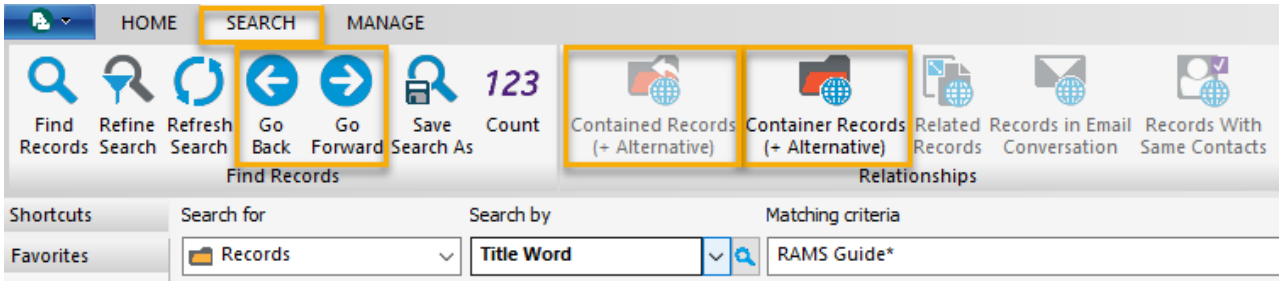
3. Refine searches

We can refine the search results that we've just run by selecting the **Search** tab and clicking on **Refine Search** (or shortcut key F7).

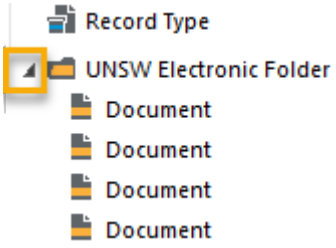


4. Navigate through records

In the **Search** tab, you can navigate through searches using **Back**, **Forward**, **Contained Records (+ Alternative)** and **Container Records (+ Alternative)**. The tools are greyed out when they are unavailable.



You can also click the plus (+) beside contain record types to view the records contained within.



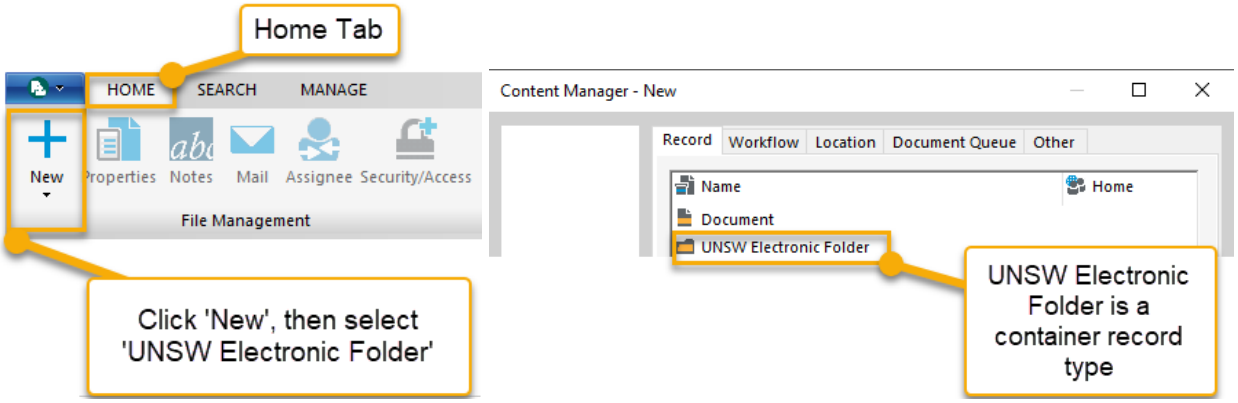
Creating containers

RAMS operates on a relatively flat hierarchical structure; records are contained in standalone containers. The most common record type is the UNSW Electronic Folder.

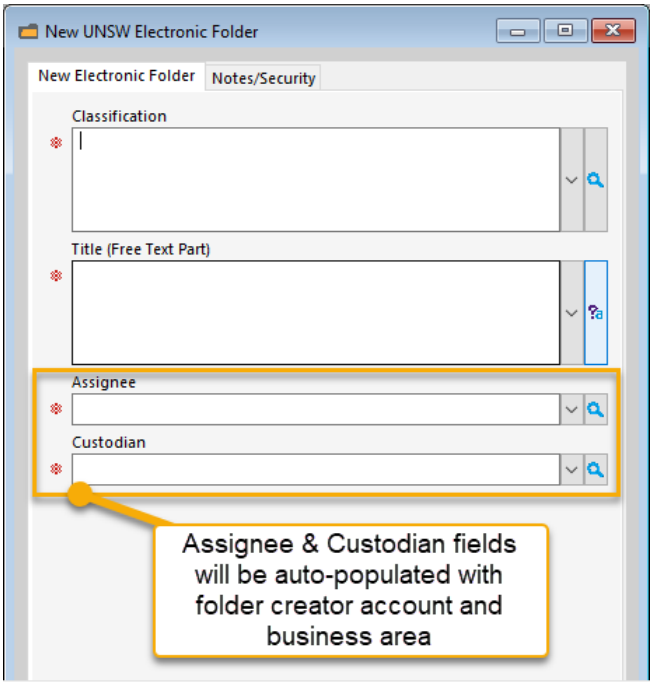
Functional classification is used to aggregate containers. Access Control restricts who can see different records.

1. Create a container

In the **Home** tab, click on the blue plus (**+**). Select **UNSW Electronic Folder** (or another appropriate container record type) and click **OK.**

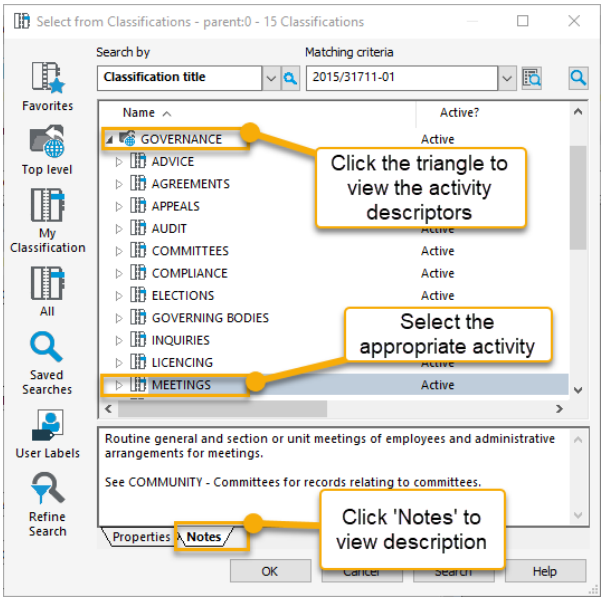


All mandatory fields are marked with a red asterisk (*). The **Assignee** and **Custodian** fields will automatically populate with your account name and unit. There is generally no need to change these unless you are creating a container for someone else.



2. Apply a classification

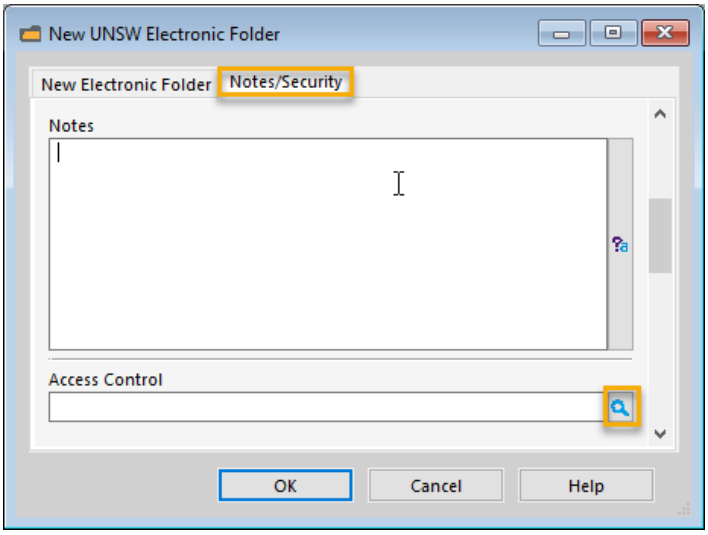
To select a classification, click on the blue folder icon ( ) beside the **Classification** field. The list of classifications is based on the UNSW Business Classification Scheme (BCS). You can read a description of each classification in the **Notes** tab at the bottom.



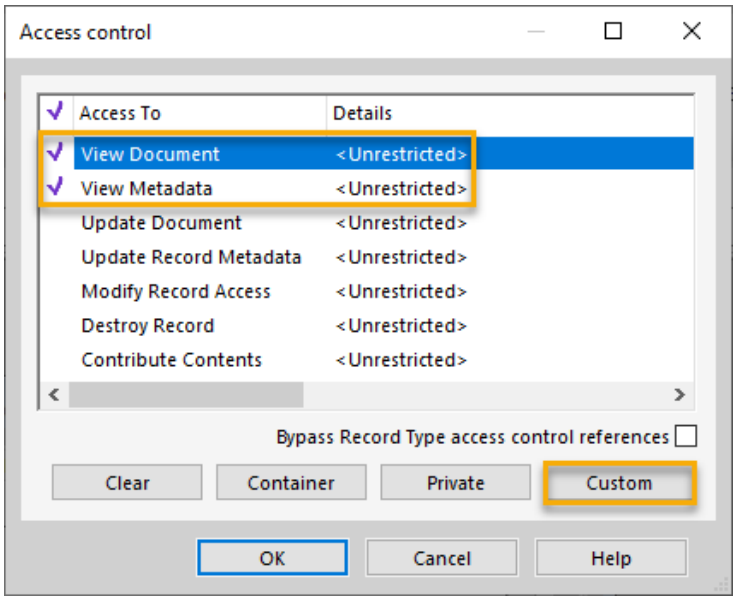
Complete the **Title (Free Text Part)** with a meaningful description of the intended contents.

3. Apply an Access Control

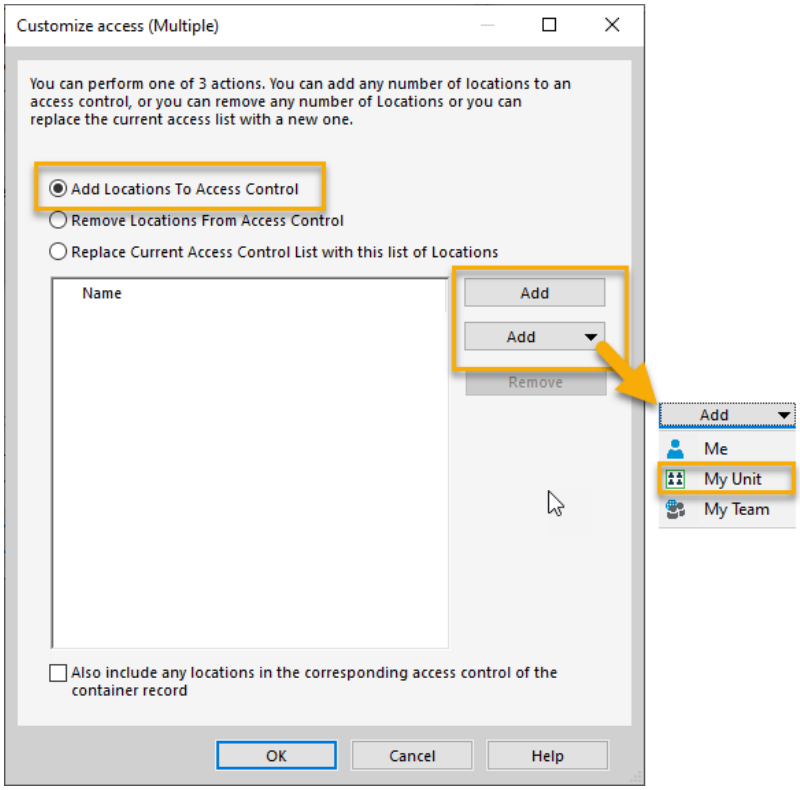
In the **Notes/Security** tab, click on the blue folder icon ( ) beside **Access Control**.



Tag **View Document** and **View Metadata** by clicking in the space to the left of each line and click **Custom**.



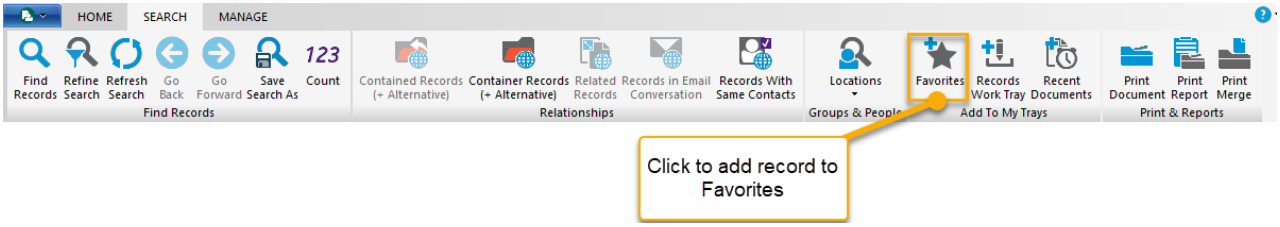
Either select **Add** to search for a group or position or select **Add ▼** to add your own unit. Then click **OK** three times.



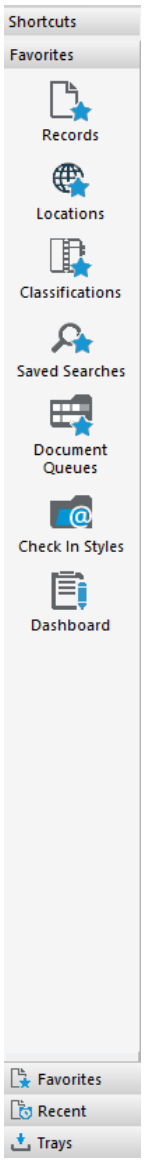
4. Add records to your Favorites or Work Tray

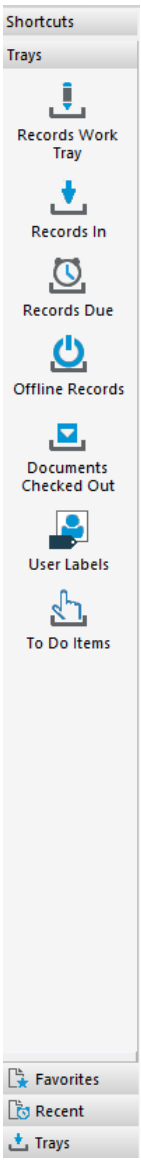
To add a record (or container) to your Favorites, highlight it, go to the **Search** tab and select **Favorites**. Your **Records Work Tray** works in the same way.

Alternatively, highlight the record (or container) right click, then select Send to > Favorites and/or Add to Records Work Tray.



To access items saved to your Favorites or Work Tray go to the **Shortcuts** pane on the left-hand side of your RAMS window. Then click either **Favorites** and select **Records** or **Trays** and select **Records Work Tray**.





Capturing records

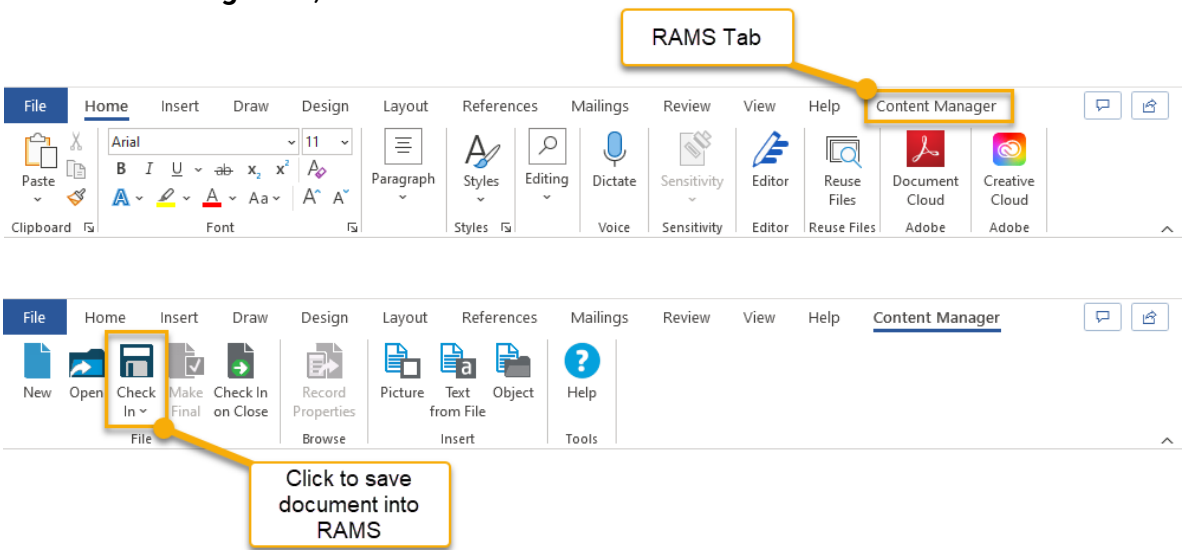
RAMS can store records in any file format. It also has an integration with Office 365 applications (Excel, Outlook, PowerPoint, Project, and Word).

1. Using the Microsoft Office 365 integration

RAMS integrates with Excel, PowerPoint, Project, and Word. This enables you to capture, edit and open records in their native application.

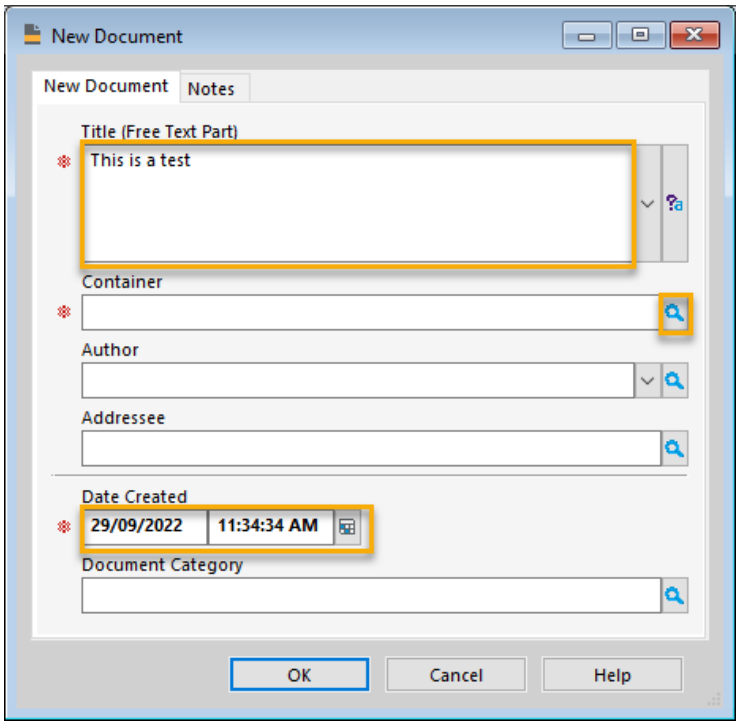
We use the term 'check in' instead of 'save' when capturing a record into RAMS using the Office 365 integration.

In the **Content Manager** tab, click **Check In**.



Select the **Document** record type and click **OK**.

A **New Document** registration window will open.



Check the description in the **Title (Free Text Part)** field is meaningful. Amend now if needed.

Next, in the **Container** field, either type in the record number or click on the blue folder icon (🔍) to search for the correct container you wish to add the document to.

RAMS will automatically populate the **Date Create** fields. **Author** and **Document Category** fields are optional.

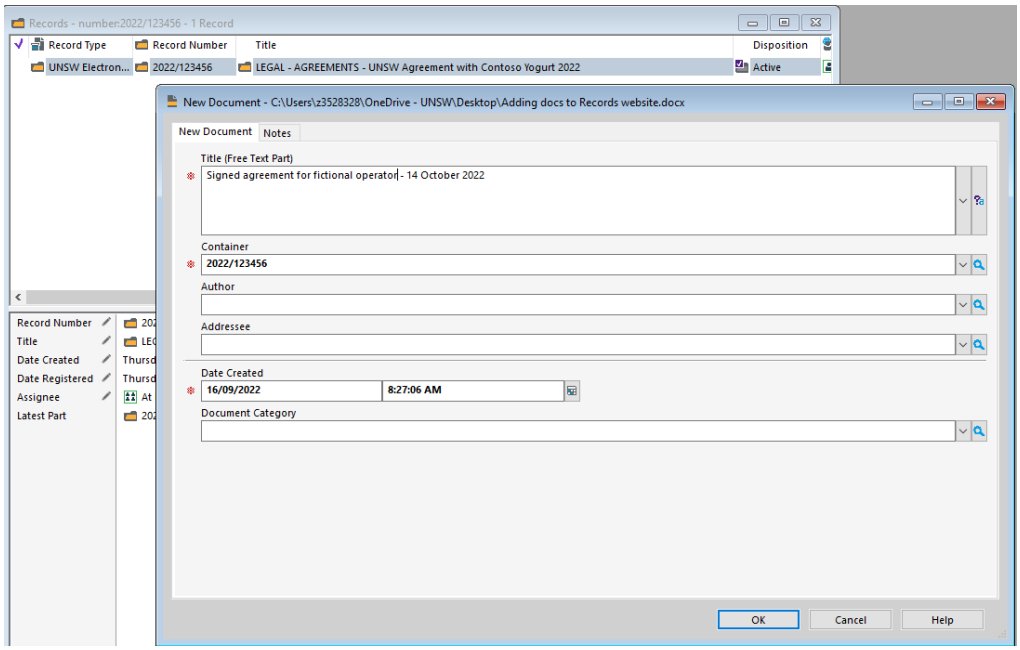
2. Drag 'n' Drop method

You can also capture records into RAMS through the drag 'n' drop method. This can be used for all electronic document types.

Select the record you want to capture and drag it over the RAMS window until a plus (+) appears beside your pointer icon.

When you release the **New Document** registration window will appear for you to complete its Title (Free Text Part) and add your Container number.

*Tip: If you drag 'n' drop a record directly on top of a selected RAMS container, the **Container** field will automatically populate.*

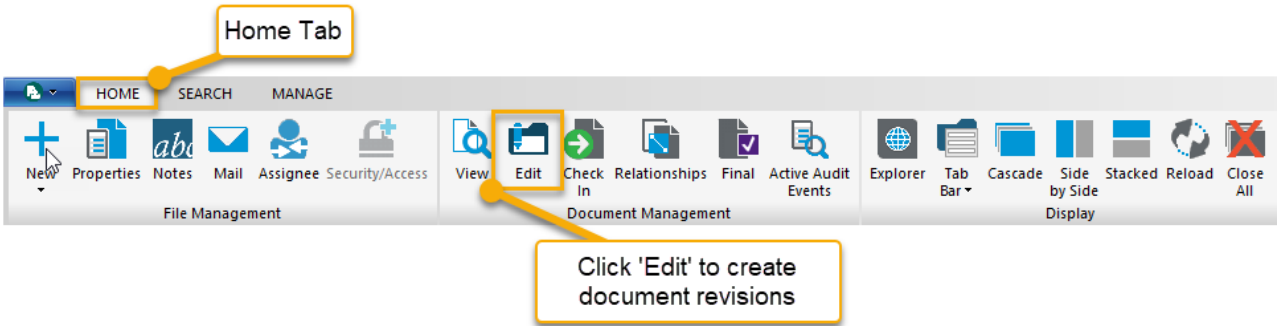


Edit Microsoft Office 365 documents

The **Edit** function enables amendments to be made which provides opportunity for collaboration, audit trails and captures a history of previous revisions.

To edit a Microsoft Office 365 document record in RAMS, select it and click **Edit** in the **Home** tab

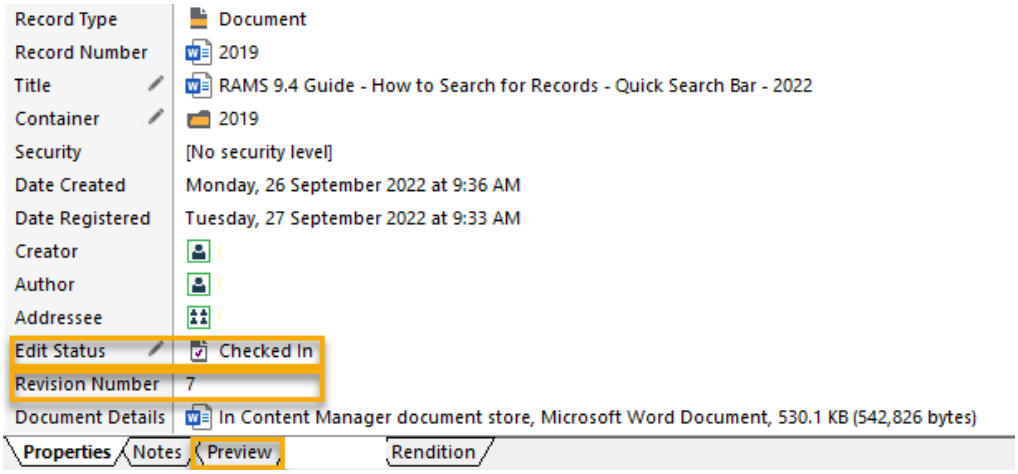
Alternatively, you can select then right click > Edit.



This will open the record in its native Office 365 application in Edit mode.

Once you have finished editing the record, click **Save** ( ) and close the record in the Microsoft Office application. Microsoft Office will send the latest revision to RAMS.

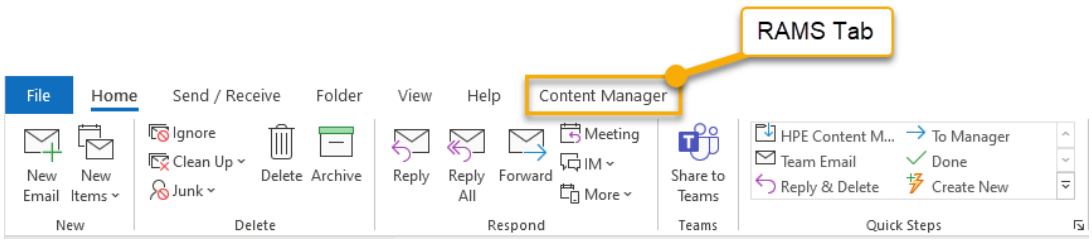
You can verify this by looking at the **Edit Status** and **Revision Number** in the **View Pane** in RAMS. You can also **Preview** the record and see the most recent revision of the document.



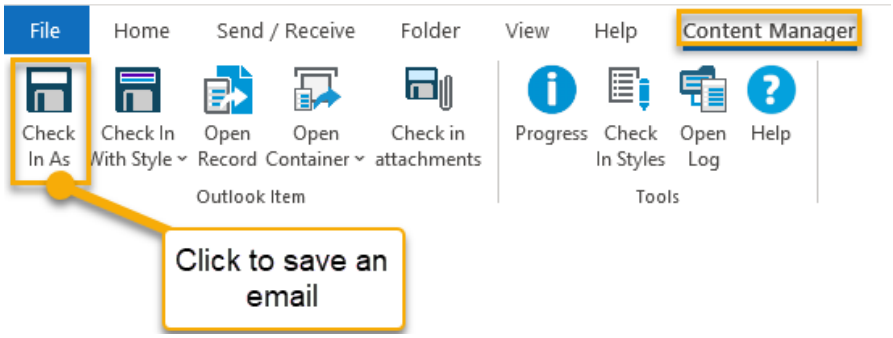
Email integration (Outlook)

The RAMS integration in **Outlook** is very similar to other Office 365 applications.

1. Using Outlook Integration



In the **Content Manager** tab, click **Check In As** to capture incoming emails.



Select the **Document** record type and click **OK**. The New Document registration window will appear for you to complete.

2. Drag 'n' Drop method

You can also use the Drag 'n Drop method to save to RAMS. In Outlook, select the email you want to capture to RAMS.

Click and hold then drag the email across to an open RAMS screen (or RAMS container already selected).

A (+) sign will indicate you have successfully selected the container or RAMS screen. Next, 'drop' the email onto your selected RAMS location.

When you release the **New Document** registration window will appear for you to complete its Title (Free Text Part) and add your Container number (if not already auto populated).

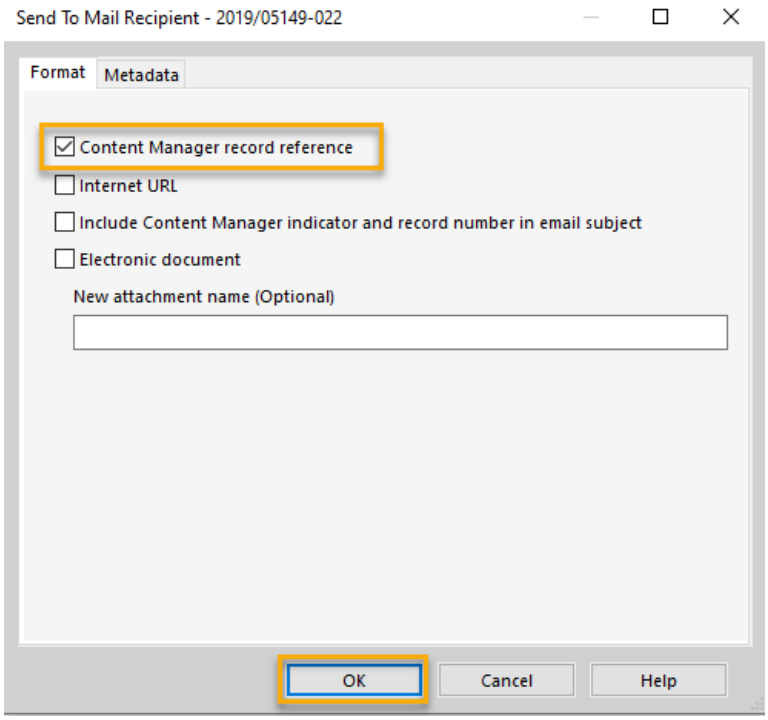
3. Send record links via email

Sending a record link is a great way to share information between UNSW staff. It ensures that everyone is working off the most recent version of a record and provides an additional layer of security because only people with access to the record in RAMS can open the link.

To send a record link, select a record (or container) in RAMS then click on the **Mail** icon in the **Home** tab.

Alternatively, select a record (or container), right click > Send To > Mail.

In the **Send to Mail Recipient** window, tick the box beside **Content Manager record reference** and click **OK**.



A new email will be created with a record **link** attached. This link can be sent and double-clicked to open it in RAMS.

Reminder: RAMS security features mean only those with access permissions to the record will be able to successfully open the link.