



HP Records Manager (HPRM 8.1) Web Client Classic User Guide

Records Management Unit

www.utas.edu.au/it/records

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1 Introduction

The HP Records Manager (HPRM), previously called TRIM, Web Client is available for University staff members who may not require the full functionality associated with the full client or are utilising an alternative environment that may not be compatible.

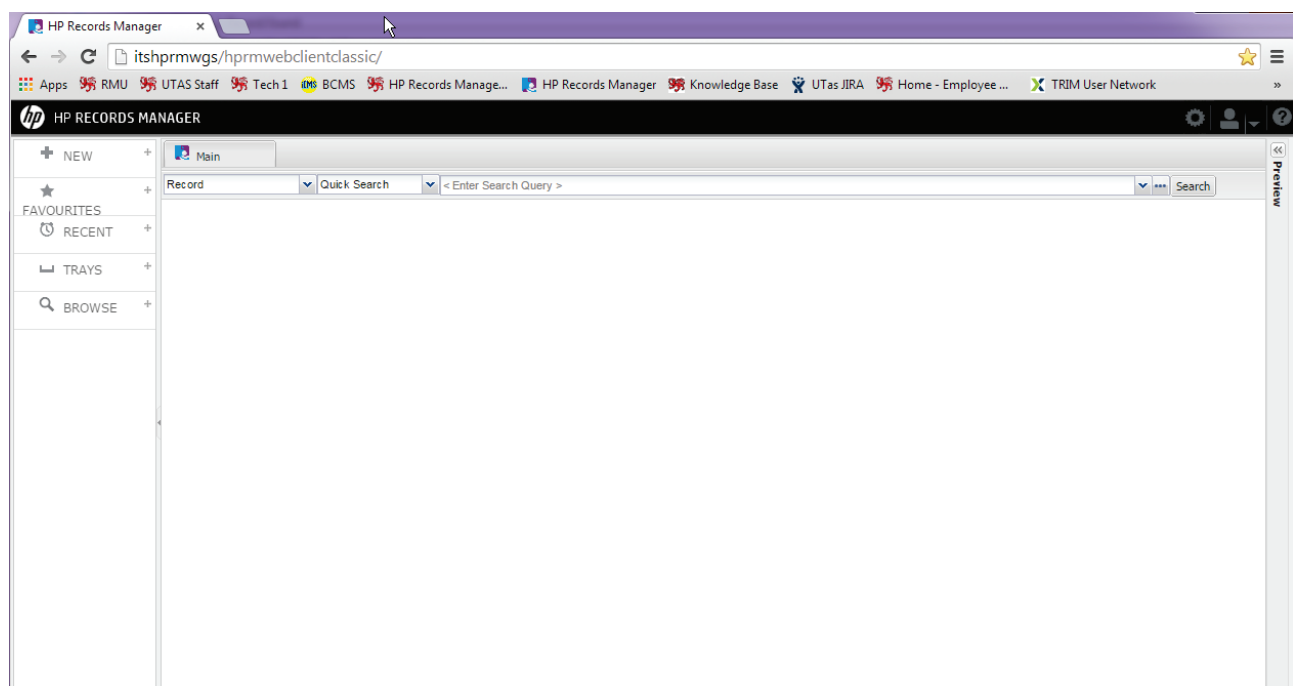
The Web Client provides browser-based access to the HP Records Manager database. It is designed to be consistent with the look and feel of the full HPRM client and customisable to suit our intranet. Users can register, edit and finalise documents, including email, into HPRM via the Web Client. If you are required to extensively use the system it is recommended that the full HPRM client is utilised.

2 Access to HPRM Web Client

The HPRM Web Client is accessible through most browsers including Internet Explorer, Chrome, Safari and Firefox. (Note: The screen shots in this User Guide originate from Chrome.)

Permissions to access the Web Client are managed through active directory, but if you are using a wireless connection you will be required to enter your username and password in a pop up box.

1. Open your browser and place the following internet address in the internet address field:
<http://itshprmwgs/hprmwebclientclassic>
2. If you need to authenticate your login details with your username and password a pop up box will be presented.
3. HP Records Manager will open.



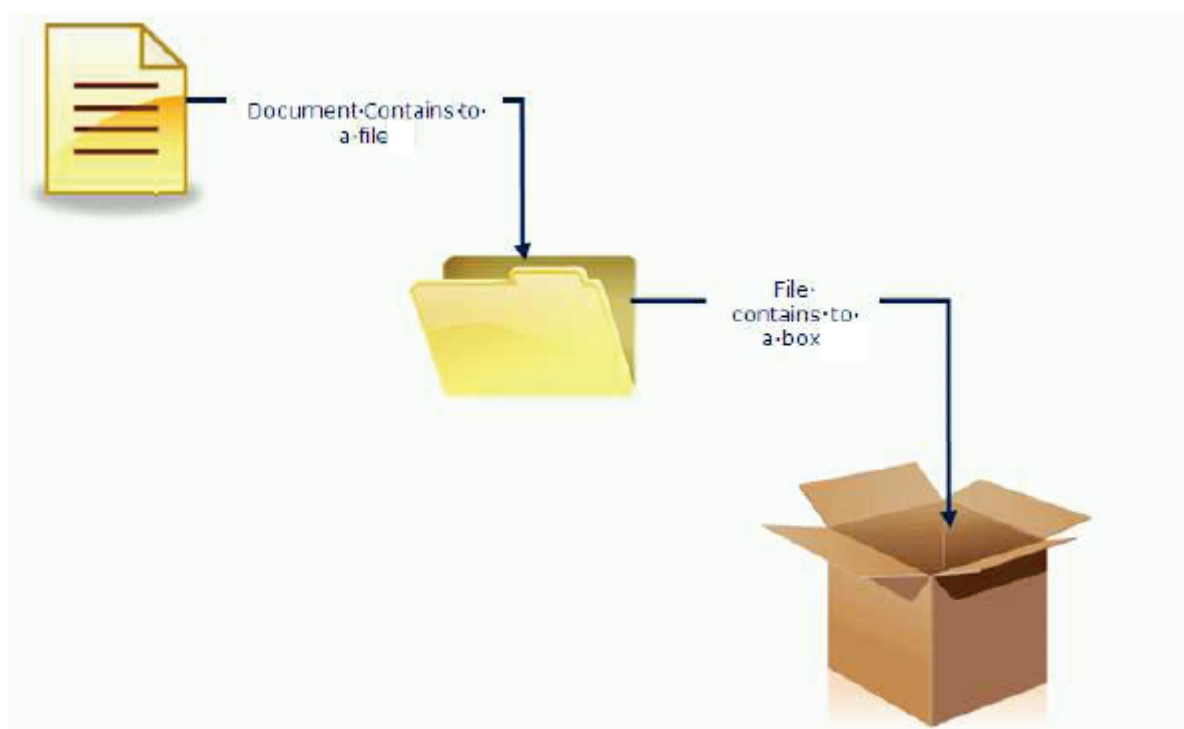
Tip: Add this to your Bookmarks for easy reference.

3 HP Records Manager Overview

HP Records Manager is the Electronic Document and Records Management System used to capture, manage and retrieve records and information for the University. HPRM is used to manage both hardcopy and electronic records.

3.1 Record Types

Record Types are a way to group similar items together. A Record Type is visually distinguished by its icon (shape and colour). It also differs by its numbering pattern, its access requirements and the metadata collected for the records it represents. Record Types have a hierarchical structure to allow certain Record Types to be attached within another, e.g. a document in a folder.

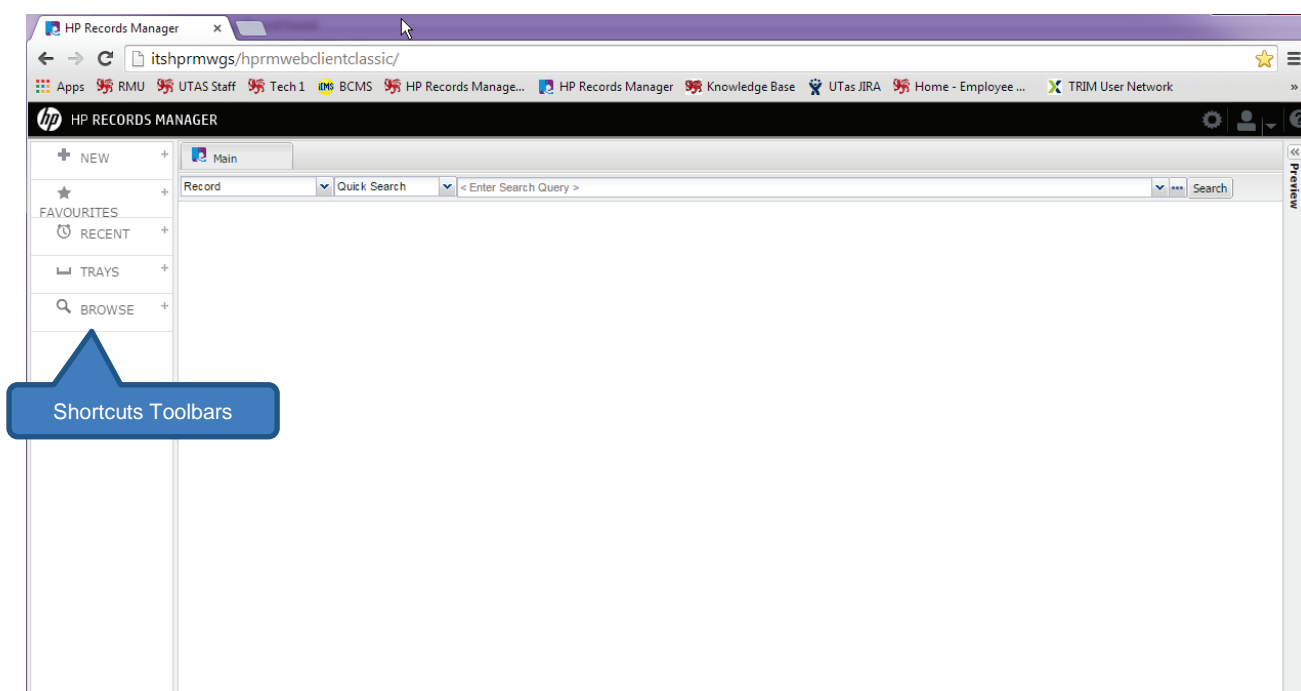


Refer to [Appendix 1 – Record types](#) for specific breakdowns applicable to University requirements.

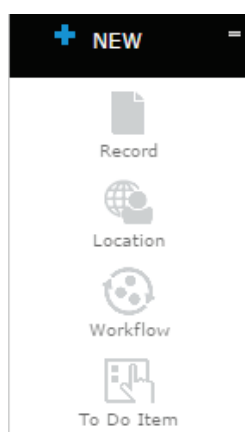
4 Screens and Functionality

4.1 Shortcuts Toolbar

Shortcuts allow you quick access to HPRM functionality. Shortcuts are broken up into the following categories: New, Favourites, Recent, Trays and Browse.



4.1.1 New Tab



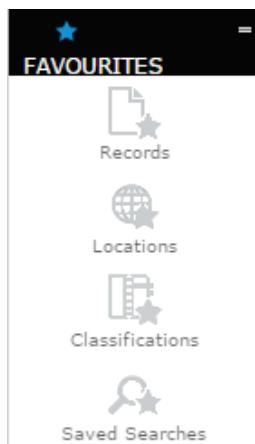
New Tab: Allows the user to register new Records into HPRM.

Location: Allows the user to register new Locations into HPRM.

Workflow: (Limited use of this function by University).

To Do Item: (Limited use of this function by University).

4.1.2 Favourites Tab



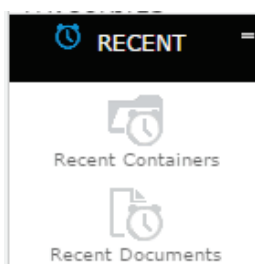
Records: Allows the user to view Records they have saved to favourites.

Locations: Allows the user to view Locations they have saved to favourites.

Classifications: Allows the user to view Classifications they have saved to favourites.

Saved Searches: Allows the user to view Saved Searches they have saved to favourites.

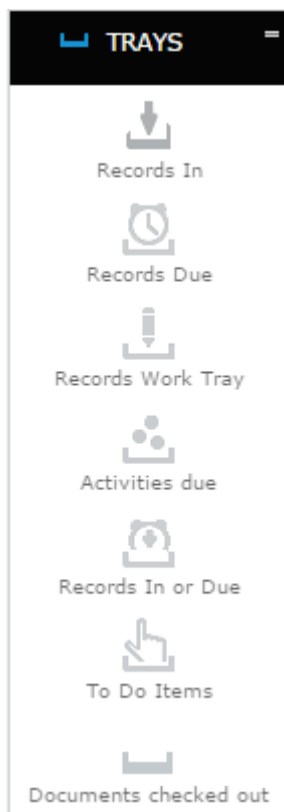
4.1.3 Recent Tab



Recent/My Containers: Allows the user to view the last 25 Folders that they have uploaded documents to.

Recent/My Documents: Allows users to view the last 25 documents that they have uploaded or edited.

4.1.4 Trays Tab



Records In Tray: Shows records that are assigned to your name.

Record Due Tray: Shows records that are actioned to you via Action Tracking.

Records Work Tray: Allows the user to view records saved to the Work Tray.

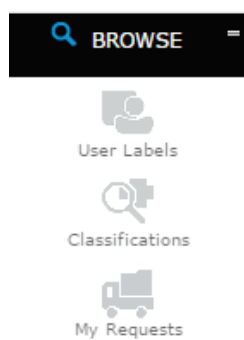
Activities Due: Shows records that are actioned to you via the Workflow module.

Records In or Due Tray: Shows records that are assigned or actioned to your name.

My To Do Items: Shows To Do items that are assigned to your name.

Documents Checked Out: Shows documents that you have checked out of HPRM.

4.1.5 Browse Tab

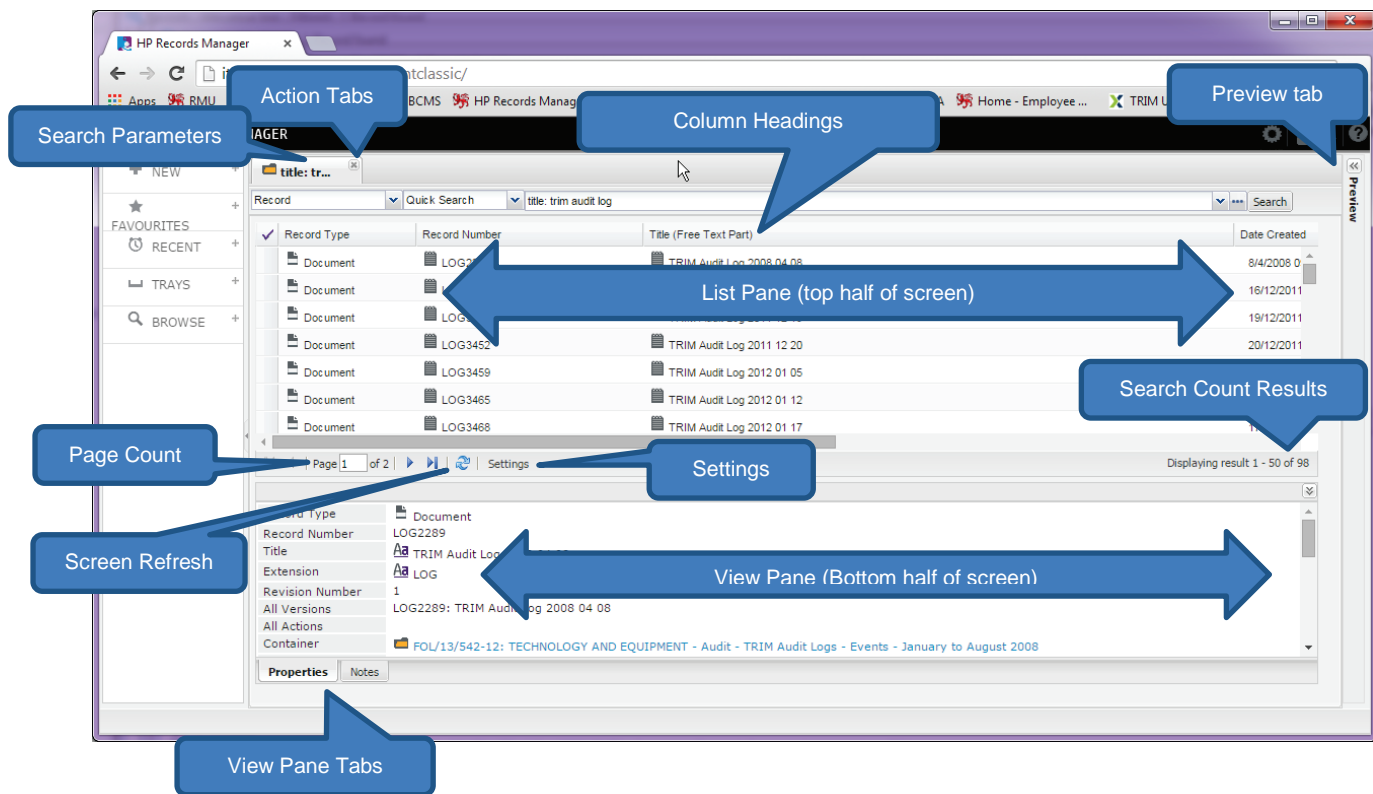


User Labels: this functionality is not currently utilised by the University.

Classifications: Allows you to browse through the classification plan to search for folder titles.

My Requests: Allows you to browse through any requests you have.

4.2 Search Results Screen



Action Tabs

When each new action is generated a new 'action tab' opens on the top of the screen in HP Records Manager.

Search Parameters

Refer to chapter on [Search Methods](#) for further clarification.

Preview Tab

Expands out to display the electronic document highlighted.

List Pane & Column Headings

Listed at the top of the screen are the results based on the Search type and value used.

Tip: You can click on the column headings to sort the order of records listed. (Note this functionality will not work on a large search result - an error message will be generated to alert you to this)

Search Results

Provides information about how many records have been returned.

Settings

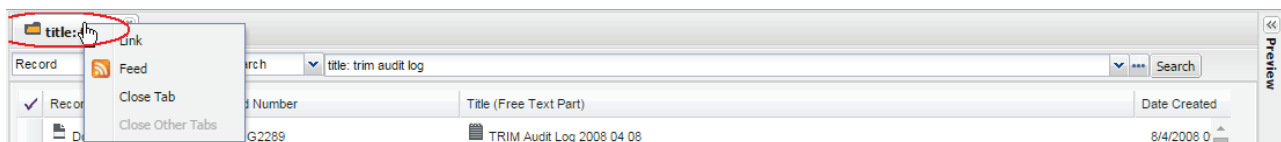
Allows you to alter the number of results shown in the List pane.

Screen Refresh	Click on the screen refresh icon to update results on the screen.
Page Count	Provides information about how many pages of results have been returned.
View Pane	This tab is under the List Pane and provides additional metadata fields depending on which tab is selected (Properties Tab or Notes Tab).
Properties Tab	Provides additional metadata fields and links as defined by the Record Type selected.
Notes Tab	Provides a view of any metadata placed into the Notes field by users in relation to the Record Type selected.

4.3 Right Click Functionality

4.3.1 Right Mouse Click on the Action tab(s)

Right mouse click on the action tab at the top of the screen and the options available are:

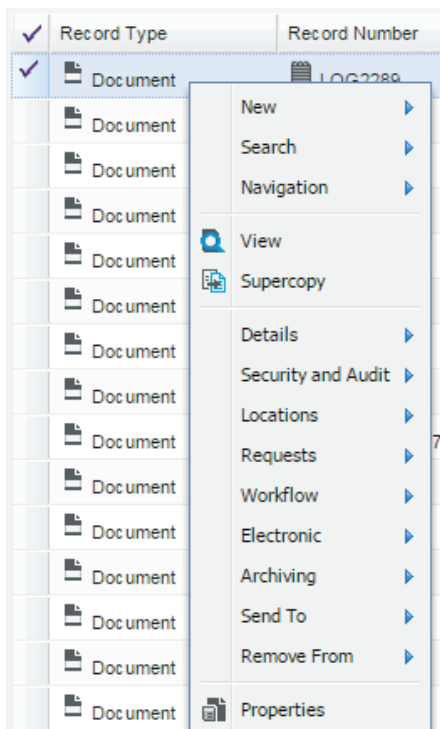


Link	Opens a new session of HPRM with the search results for that action tab.
Feed	Creates an RSS feed for the current search parameters that can be subscribed to via an RSS reader or a Live Bookmark in Firefox. It also provides a handy way to print the details of the retrieved records.
Close Tab	Will close the selected tab.
Close Other Tabs	This option is only available when more than one tab is open, and will close all tabs except the highlighted tab.

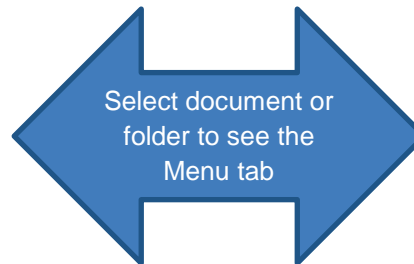
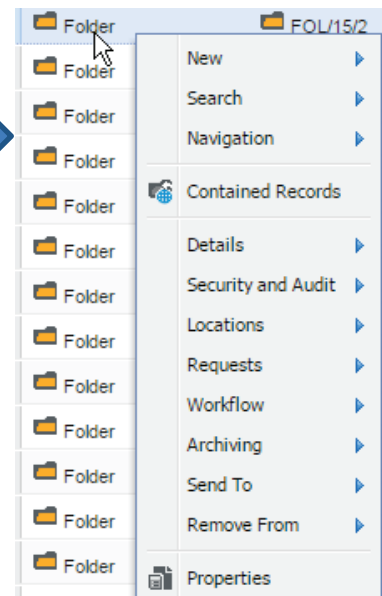
4.3.2 Right Mouse click on a folder or document

Right Mouse Click on a folder or document in the list pane and you will see a list of menu items with the same or similar functionality as in the full client. The options available will depend on the user access you have been given.

Document record type

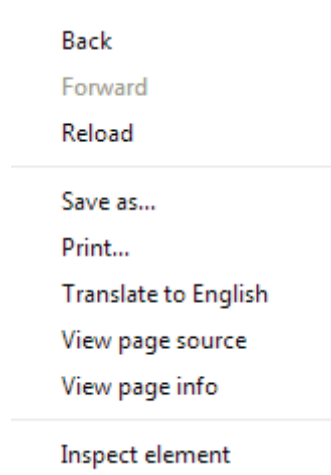


Folder record type



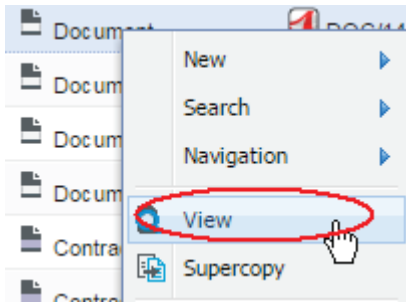
4.3.3 Right Mouse Click in View Pane or blank space

This option relates to internet functions only. Use of these options is not recommended.

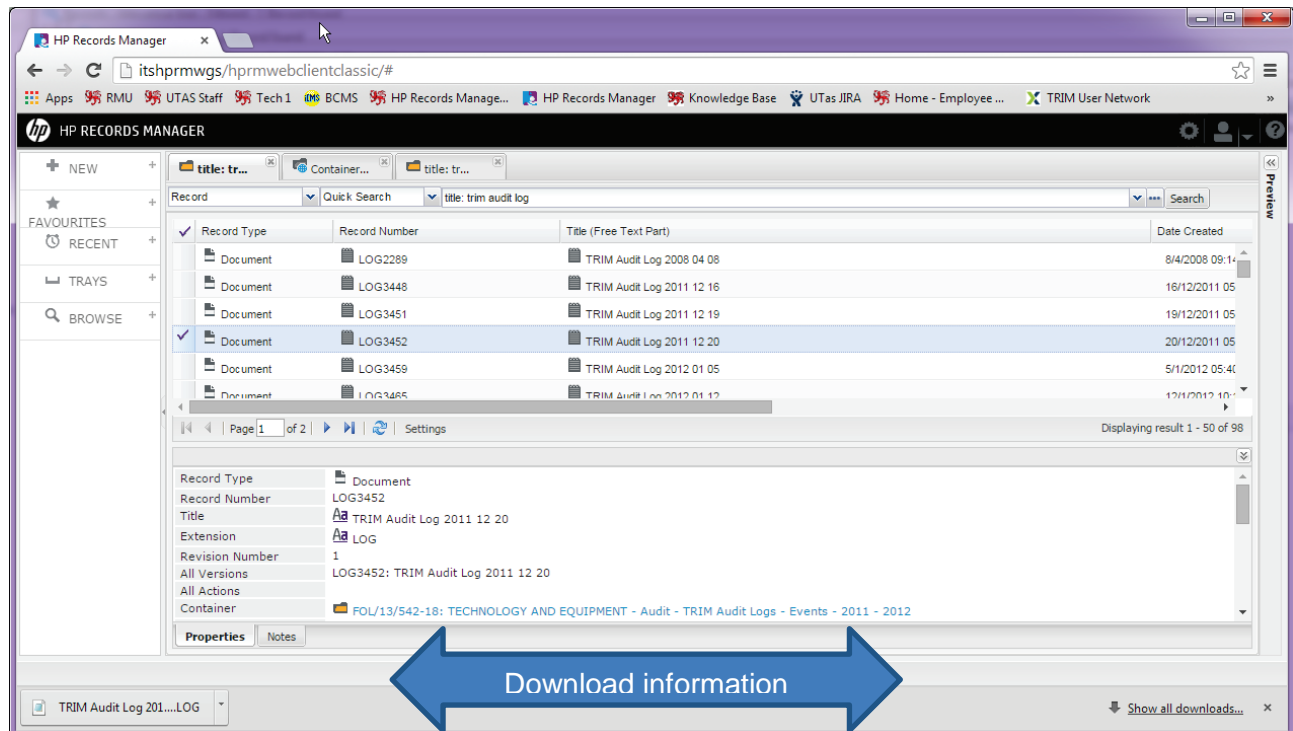


4.4 Viewing Electronic Documents

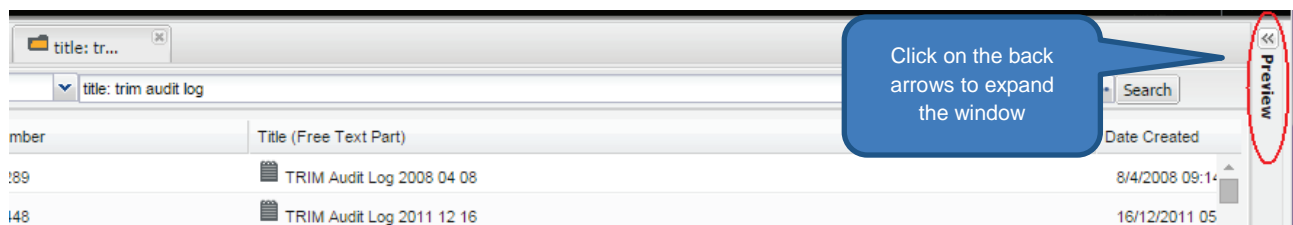
To view an electronic document from HPRM:



Highlight the record and Right Mouse Click, and then select *View* from the pop-up menu.



Hint: You may also Preview the Document by expanding the *Preview* tab.

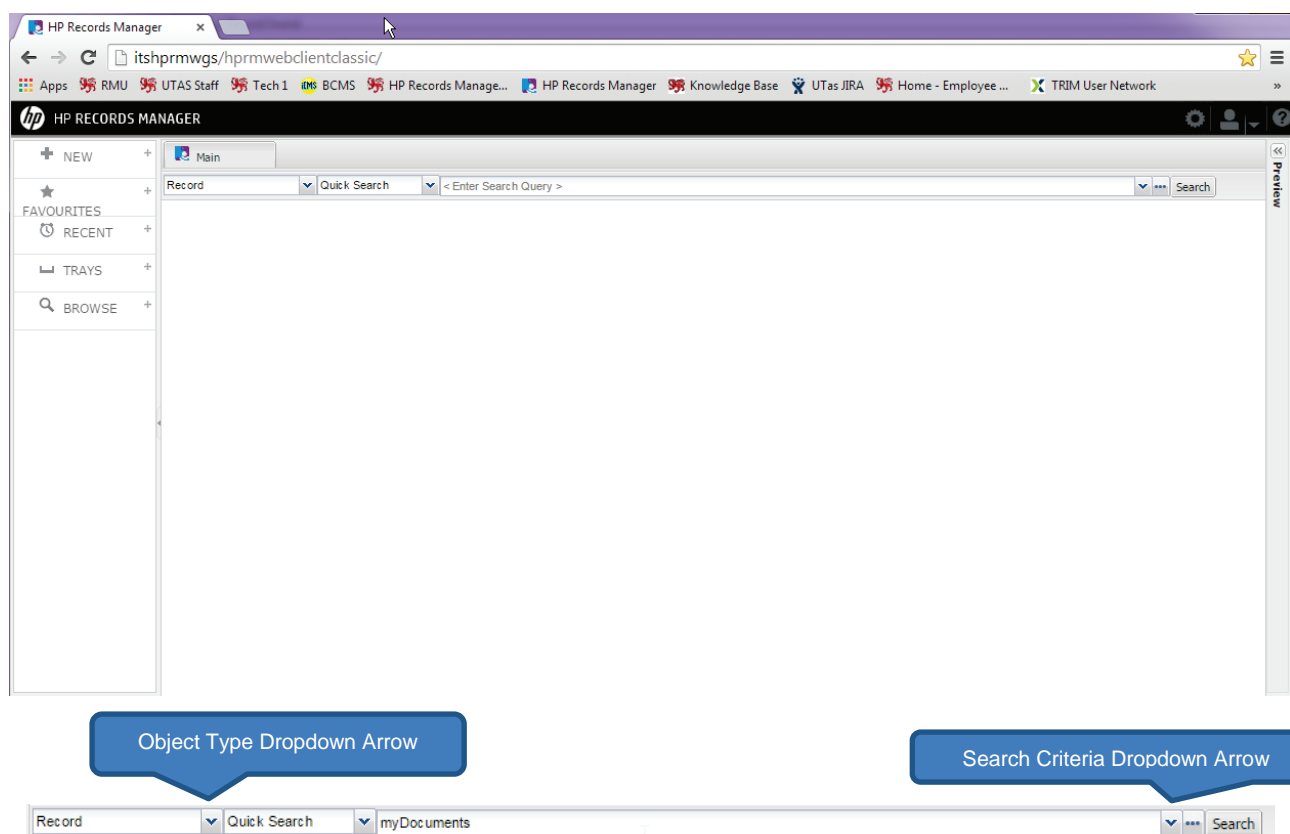


	A	B	C	D	E	F	G
1	Task	February Comments / Results	March Comments / Results	April Comments / Results	May Comments / Results	June Comments / Results	July
2	RECORDS MAINTENANCE						
3	Documents Checked Out	293	294	298	101	14	14
4	Checked In (draft) emails to be made						

5 Searching for Records

5.1 Search functionality

To run a search you must select the appropriate Object Type and Search Type and enter the search criteria to generate a search result.



At the end of the Search Criteria field is a Drop Down Arrow and either an ellipsis (...) or a Magnifying Glass icon.

Depending on the Object Type and Search Type selected, there are different methods by which the Search Criteria must be entered to generate the search.

5.1.1 Object Type

Under the Object Type drop down arrow there are a variety of values that can be selected to generate different types of searches. These are:

- Record
- Location
- Saved Search
- To Do Item
- Workflow
- Classification
- Activity

5.1.2 Search Types

Under the Search Type drop down arrow there are three options you may select. These are:

- Quick Search: this search method allows users to run a simple search using simple search criteria (refer to 5.2.1 for instructions).
- Advanced Search: this search method allows users to run more complex searches (refer to 5.2.3 for instructions).
- Form Search: this search method provides a structured form for searching across multiple search criteria.

Tip: Users can apply the Advanced Search or the Form Search functions to search for multiple criteria. These may include multiple search combinations such as: Title Word search and By Date Created, or Title Word search and Folders only.

5.2 Search Methods

5.2.1 Quick Search – finding a record by Record Number

1. Select *Record* in the Object Type field.
2. Select *Quick Search* in the Search Type field.
3. In the *Enter Search Criteria* field enter the record number.
4. Click on *Search* or press *Enter*.



The screenshot shows the search interface with three dropdown menus: 'Record' for Object Type, 'Quick Search' for Search Type, and 'myDocuments' for Search Criteria. To the right of these fields is a 'Search' button. A blue speech bubble with the word 'Search' inside points to the button.

5.2.2 Quick Search – finding a record by Record Title

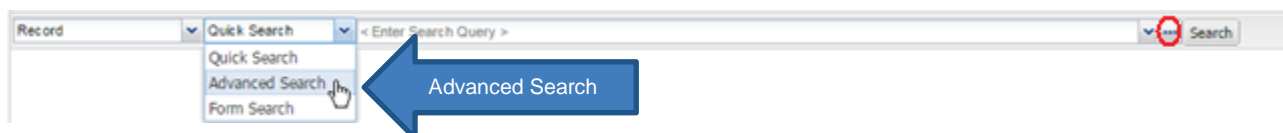
1. Select *Record* in the Object Type field.
2. Select *Quick Search* in the Search Type field.
3. In the Search Criteria field enter the title word/s to search for.

- Click on *Search* or press *Enter*.

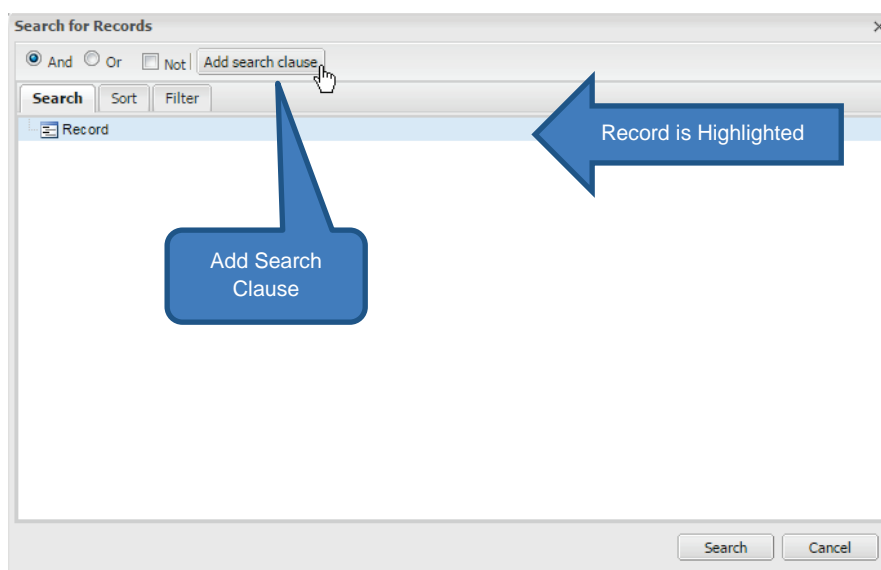


5.2.3 Advanced Searches – Searching for multiple criteria

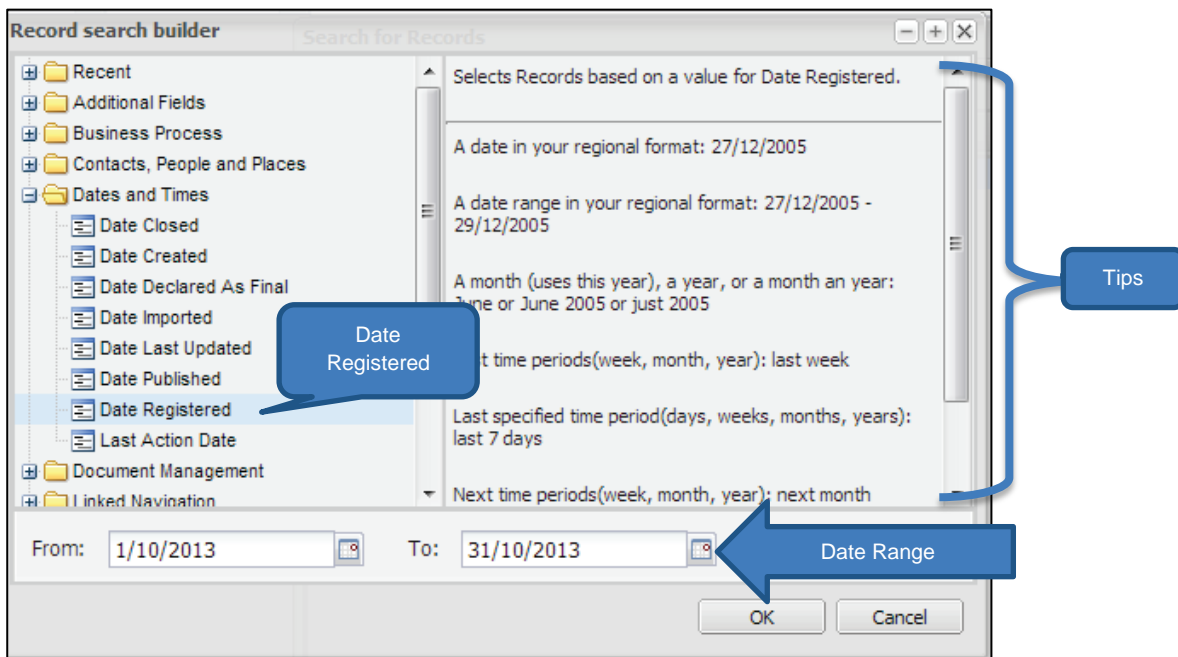
- Select *Record* in the Object field.
- Select *Advanced Search* in the Search Type field.
- Select the *Magnifying Glass or ellipsis (...) icon*.



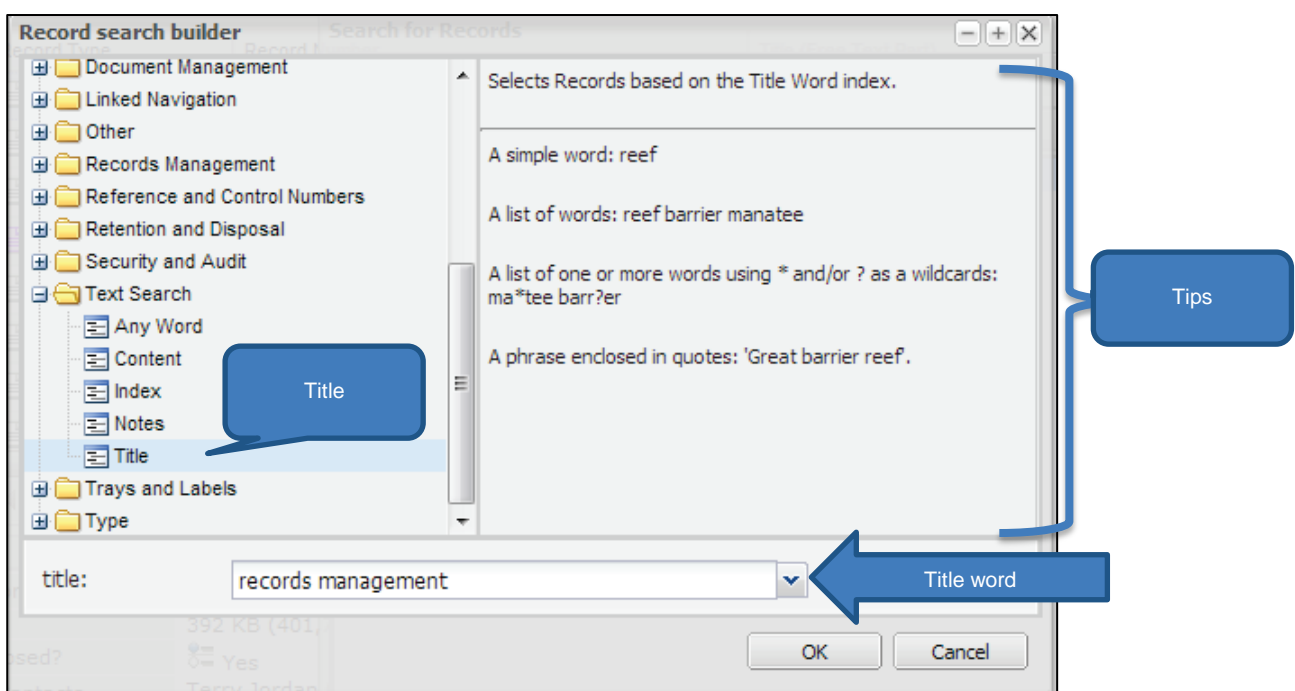
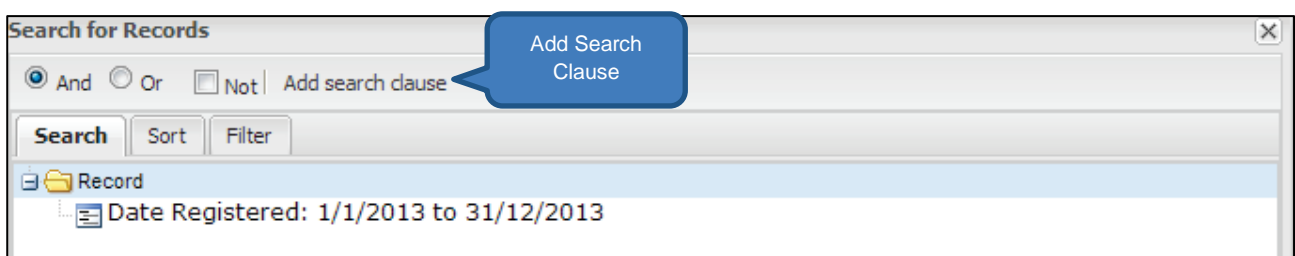
- On the Search for Records form, highlight the word *Record** and click on *Add search clause*.
*Note this will change depending on the Object Type field option selected.



- In the Record search builder dialogue box highlight the first search option to search by.
- Select from the list *Dates and Times* and expand by clicking on the +, select *Date Registered* Search and fill in the date range required.
- Click on OK.



8. Click on the *Add search clause* function again, then select and expand *Text Search* by using the + button and select *Title*.

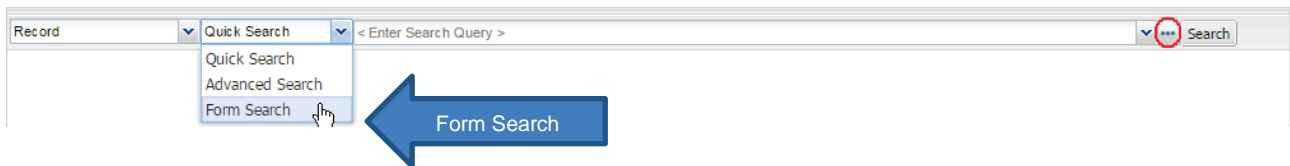


9. Click OK.
10. Click on Search.

5.2.4 Form Search

The form search allows the user to run a structured search, including multiple criteria such as *Title Word* and *By Date Registered*.

1. Leave the Object Type field as *Record*.
2. Select *Form Search* from the Search Type field by clicking the down arrow.
3. At the end of the Search Criteria field click on the *magnifying glass* or *ellipsis (...)* icon.



4. The entry form will be presented.

A screenshot of the 'Record Form Search' dialog box. It has tabs for 'Search', 'Sort', and 'Filter'. The 'Search' tab is active. It contains various search criteria fields: Title, Notes, Content, Contact, Assignee, Container, External ID, Date Created (with a 'To' field), Date Registered (with a 'To' field), Owner, Record Type, and Expanded Number. A blue bracket on the right side of the form is labeled 'Enter Search Criteria'. At the bottom are 'Search' and 'Cancel' buttons.

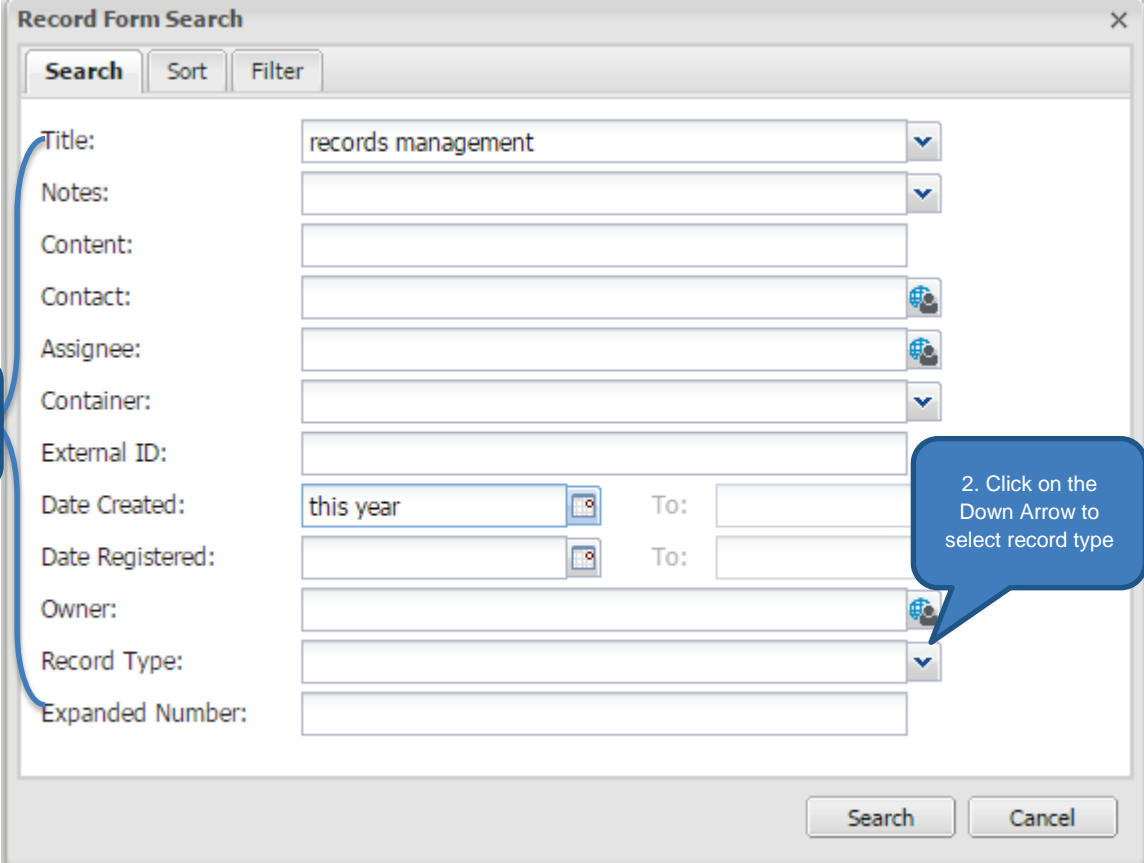
5. Fill in the search criteria depending on the search result required, e.g. Title and Date Created.
6. Click on Search or Press Enter.

The function of each field in the Form is described below.

Field	Description
Title	Allows a user to search for any information entered into the Title field of a record type. E.g. Legal Advice
Notes	Allows a user to search for any information entered into the Notes field of records.
Content	Allows a user to search for any word or phrase within the content of a document that has been scanned using Optical Character Recognition (OCR) or within born digital documents such as Microsoft Word documents, Excel spreadsheets or email.
Assignee	Allows a user to search for any documents or folders assigned to a person.
Container	Allows a user to search for the containers (folders) they have recently contained documents in.
External ID	Allows a user to search for external references applied to records.
Date Created	Allows a user to search for the date a record was authored or signed.
Date Registered	Allows a user to search for the date records were registered into HP Records Manager.
Owner Location	Allows a user to search for records owned by an individual business unit.
Record Type	Allows a user to filter searches to specific record types, e.g. Contract.
Expanded Number	Allows a user to search for any records by a number, e.g. FOL/2013/01000 to FOL/2013/02000.

5.2.5 Form Search – Filter by Record Type

1. To filter a form search by Record Type, you first need to enter a search criteria such as the Title field or Date Created.
2. Click on the down arrow at the end of the Record Type field.



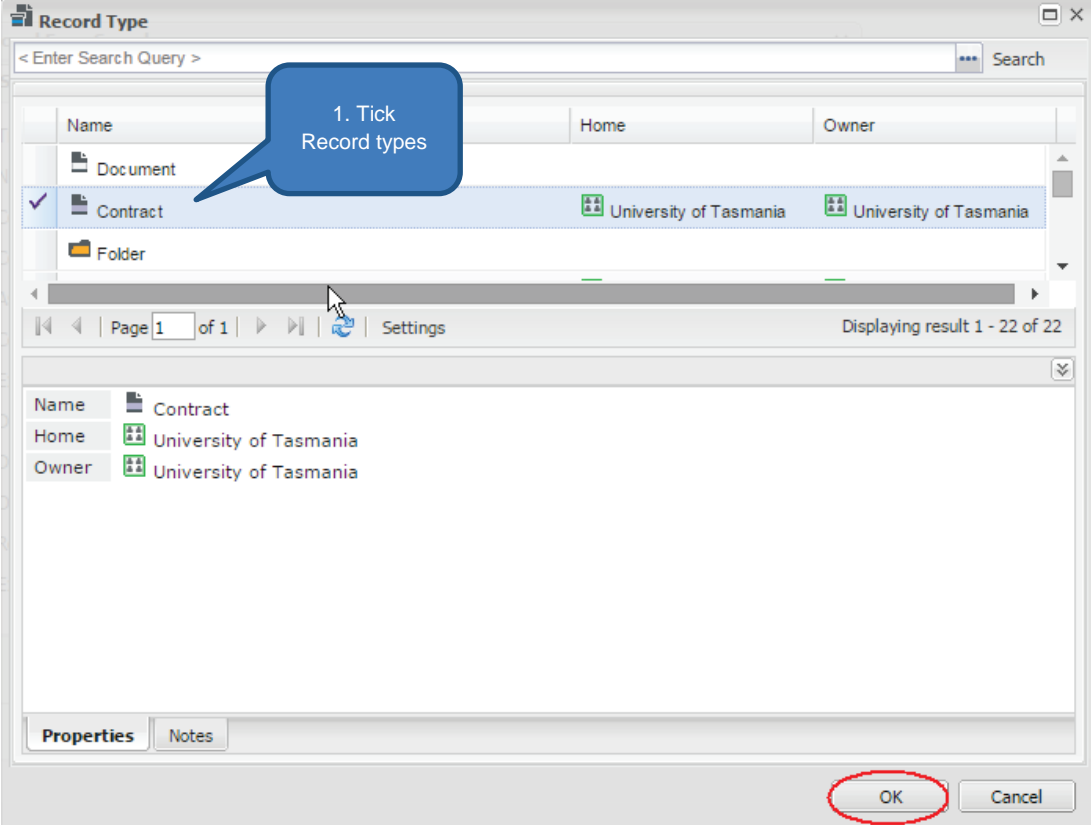
The **Record Form Search** dialog box contains the following fields and controls:

- Search** (selected), **Sort**, **Filter** tabs
- Title:** records management
- Notes:**
- Content:**
- Contact:**
- Assignee:**
- Container:**
- External ID:**
- Date Created:** this year
- To:**
- Date Registered:**
- To:**
- Owner:**
- Record Type:**
- Expanded Number:**
- Search** and **Cancel** buttons

Annotations:

- 1. Enter Search Criteria
- 2. Click on the Down Arrow to select record type

3. Tick the Record Types required for the search.



The **Record Type** dialog box displays a list of record types with columns for Name, Home, and Owner. The **Contract** type is selected.

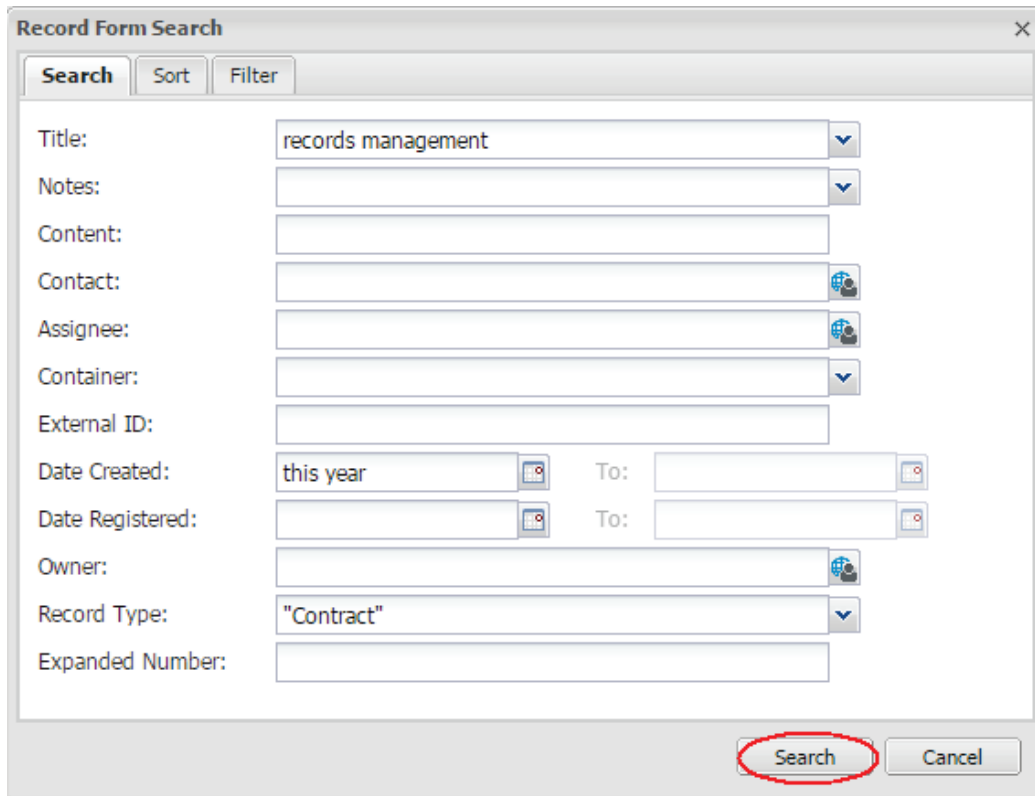
Name	Home	Owner
Document		
<input checked="" type="checkbox"/> Contract	University of Tasmania	University of Tasmania
Folder		

Annotations:

- 1. Tick Record types

Buttons: **OK** (circled in red), **Cancel**

4. Click OK.



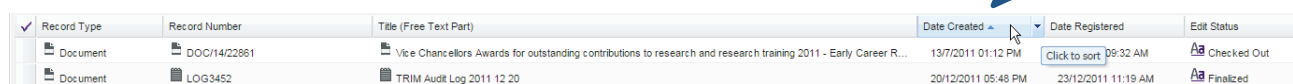
The 'Record Form Search' dialog box contains the following fields and controls:

- Search** (selected), **Sort**, **Filter** tabs
- Title:** records management
- Notes:**
- Content:**
- Contact:**
- Assignee:**
- Container:**
- External ID:**
- Date Created:** this year **To:**
- Date Registered:** **To:**
- Owner:**
- Record Type:** "Contract"
- Expanded Number:**
- Search** (button, circled in red)
- Cancel** (button)

5. Click Search.

5.2.6 Sorting Search Results

Sorting can be activated by clicking on the column headings in the list pane when a search is generated. E.g. Date Created.



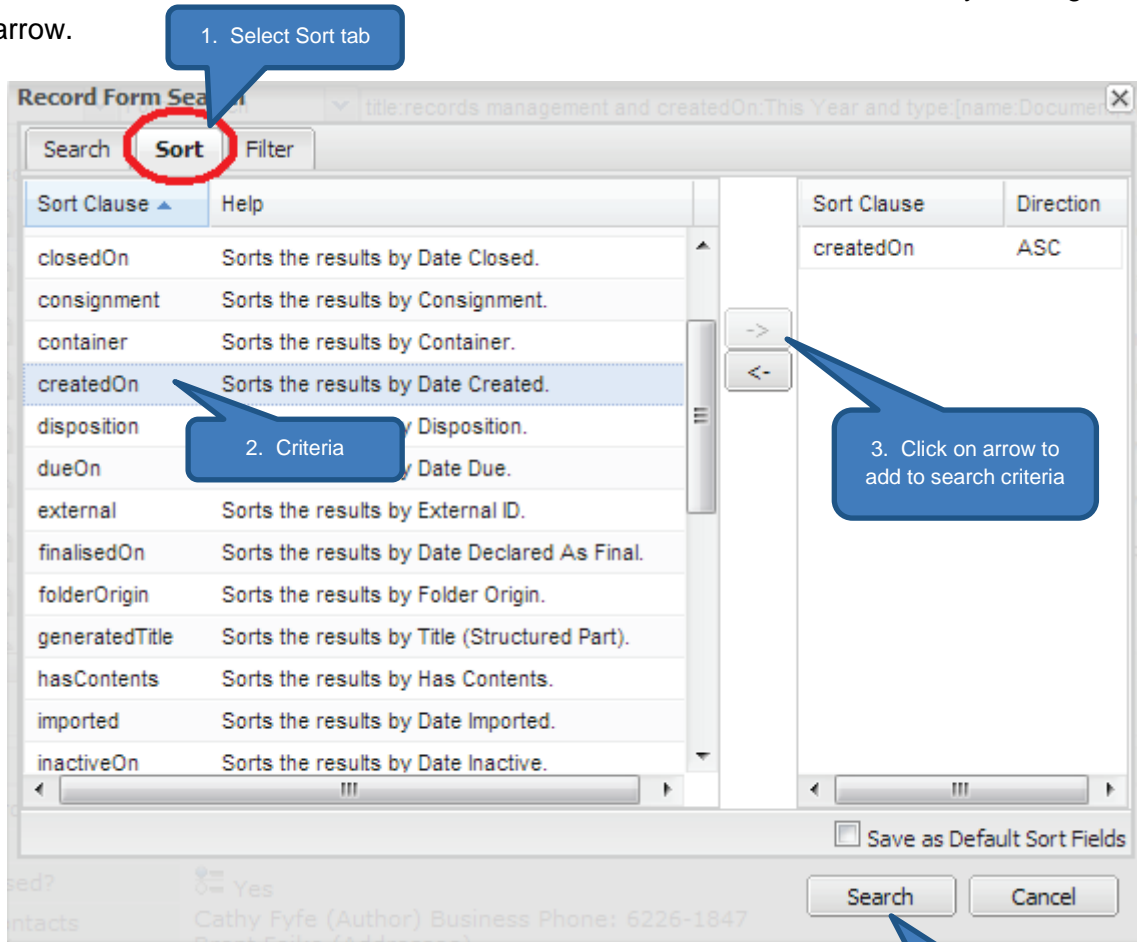
A callout bubble points to the 'Date Created' column header with the text: "Click on column heading to sort".

Record Type	Record Number	Title (Free Text Part)	Date Created	Date Registered	Edit Status
Document	DOC/14/22861	Vice Chancellors Awards for outstanding contributions to research and research training 2011 - Early Career R...	13/7/2011 01:12 PM	09:32 AM	Checked Out
Document	LOG3452	TRIM Audit Log 2011 12 20	20/12/2011 05:48 PM	23/12/2011 11:19 AM	Finalized

Tip: Sorting by column heading will not work with a large search result – a warning will generate if this occurs.

5.2.7 To sort a form search:

1. Click on the Sort tab.
2. Select a sort criteria and either double click or add it to the search criteria by clicking the add arrow.



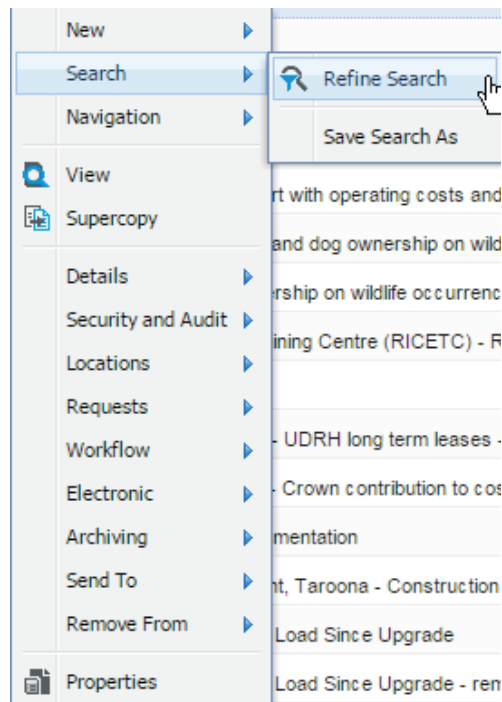
3. Click on Search.

5.3 Saved Searches

This functionality allows users to save a search that has been generated in HP Records Manager that may be re-run at any time, e.g. Records created in the last month by a particular business unit.

5.3.1 Saving a Search

1. Run the required search.
2. Right mouse click in the list pane and select Search > Save Search As.



3. In the Name field enter a description for your search.

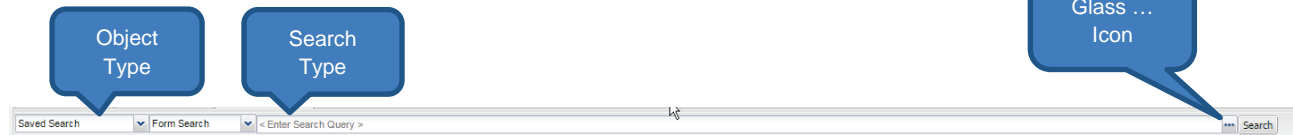
A screenshot of the 'HP Records Manager' 'Save Search As' dialog box. The 'Name' field is highlighted with a red oval. The 'Description' field contains the text 'Record - title:records management and createdOn:Last Year and type:[name:Document]'. The 'Query String' field contains 'title:records management and createdOn:Last Year and type:[na'. The 'Sort String' field contains 'createdOn'. The 'Filter String' field is empty. The 'Owner' field contains 'Fyfe, Cathy (Mrs)'. The 'Within Search Group' field is empty. At the bottom, there is a 'General' tab and 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red oval.

4. Click on Save.

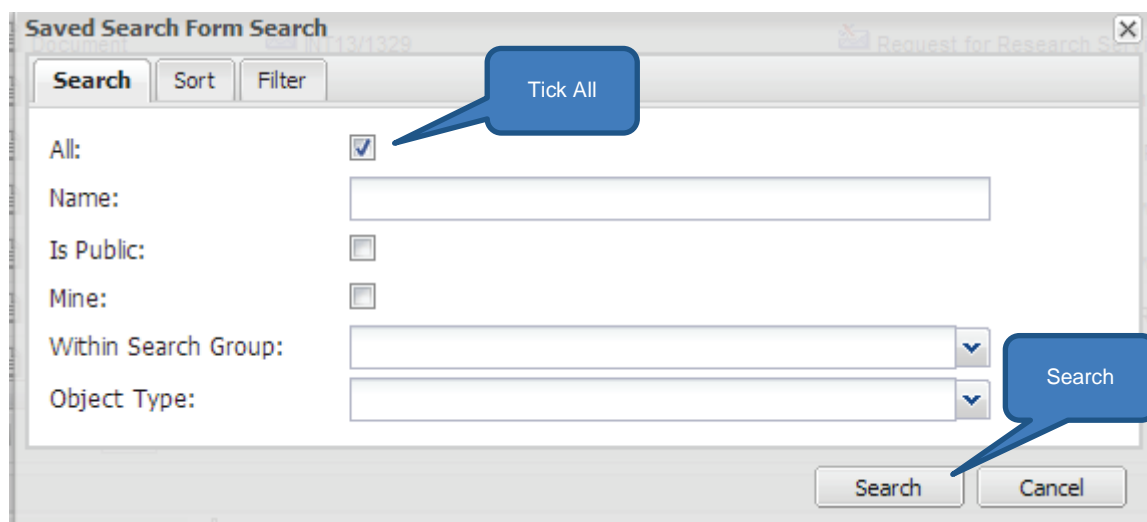
5.3.2 Finding and using a Saved Search

To locate a saved search:

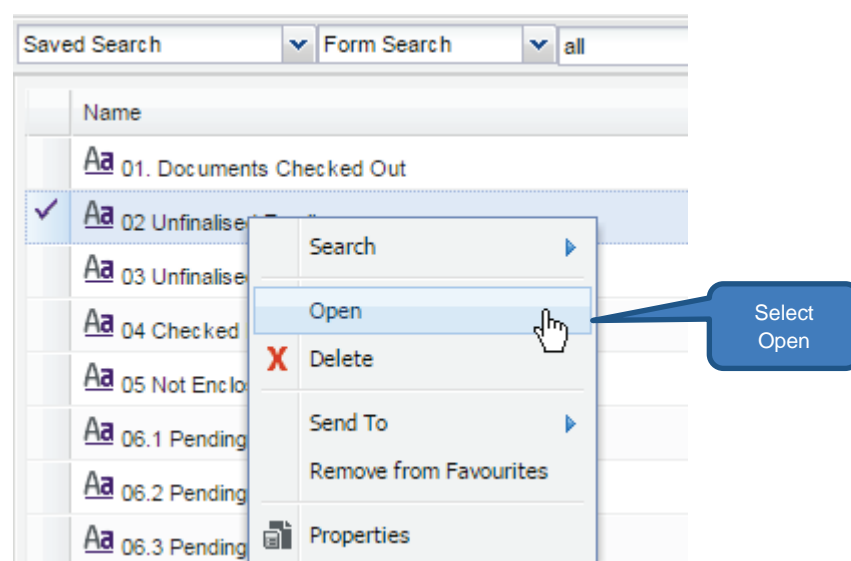
1. Change the Object field to Saved Search.
2. In the Search Type change to Form Search.
3. Click on the magnifying glass or ellipsis (...) icon.



4. In the Saved Search Form Search dialogue box, tick the *All* check box.
5. Click on *Search*.



6. Click on the desired Saved Search in the list pane and Right Mouse Click > *Open*.

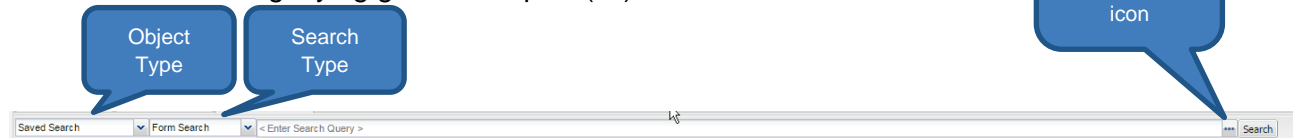


7. The results for the saved search will be presented.

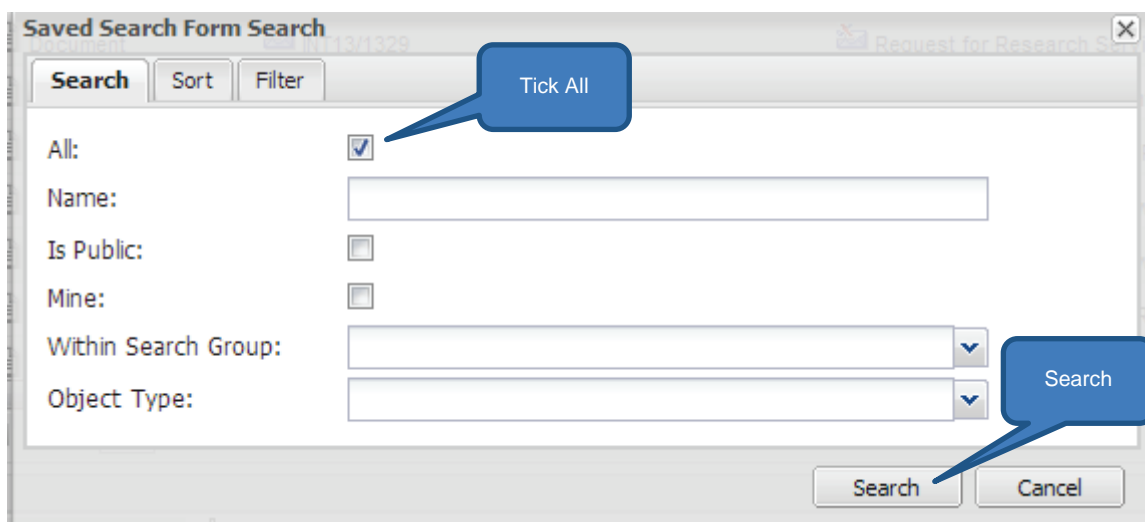
5.3.3 Adding a Saved Search to Favourites

Adding a Saved Search to your favourites allows you to quickly access searches that you undertake regularly. To add the saved search to Favourites:

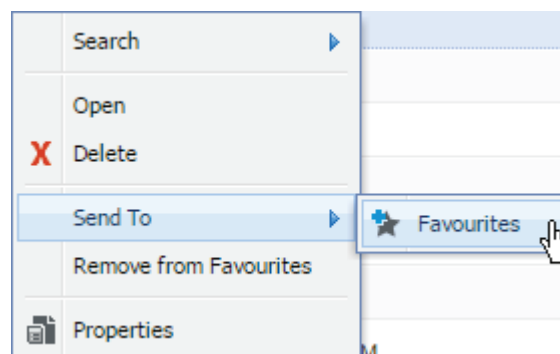
1. Change the Object Type to Saved Search.
2. In the Search Type change to Form Search.
3. Click on the magnifying glass or ellipsis (...) icon.



4. In the *Saved Search Form Search* dialogue box Tick the *All* tick box.

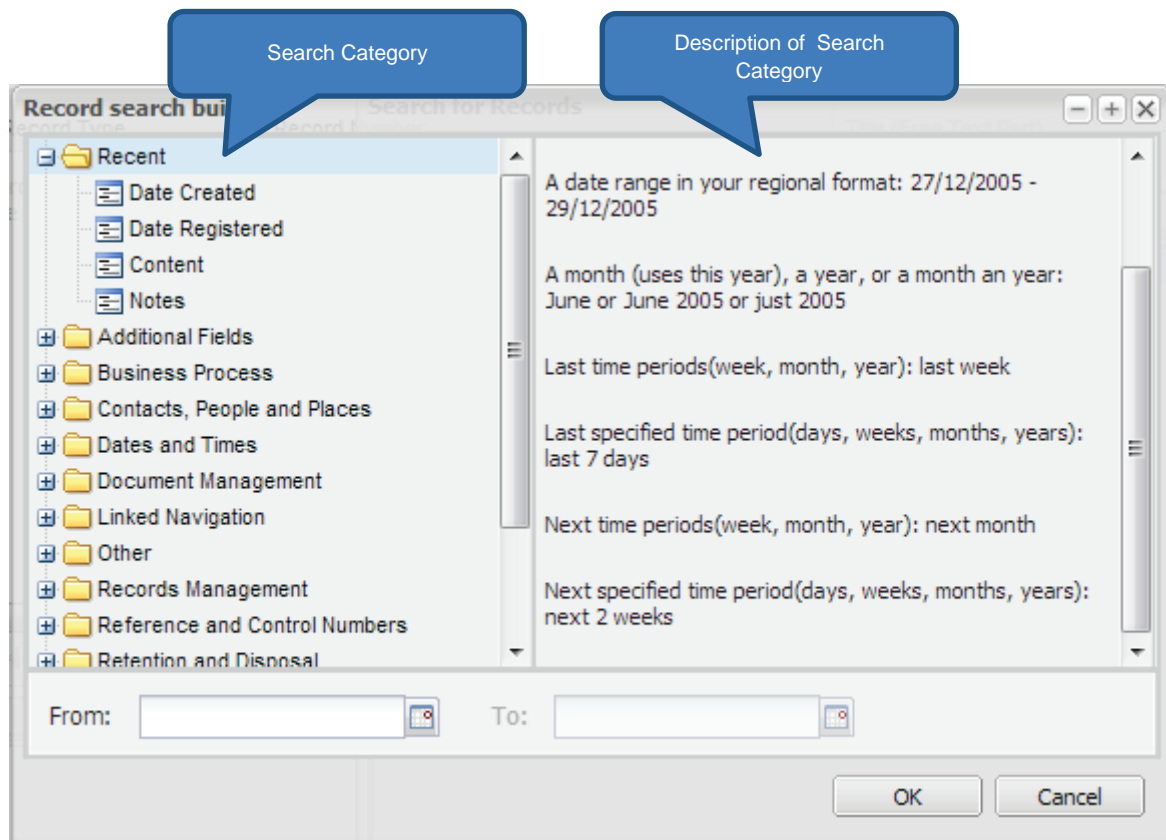


5. Click on Search.
6. Right Mouse Click and select Send To > Favourites.



5.4 Commonly used Search Types

Follow the 5 step process of the [advanced search](#) instructions to view the search options available from the record search builder.



The most commonly used Search Types include:

Recent	This expands to list the most recently used Object Types you have utilised.
---------------	---

Contacts, People and Places	This expands to include Author, Addressee, Contact and Creator.
------------------------------------	---

Dates and Times	This expands to include Date Created and Date Registered.
------------------------	---

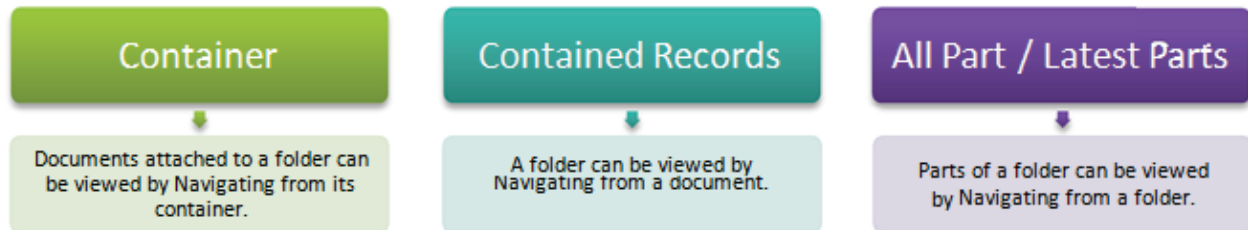
Reference and Control Numbers	This expands to include Record Number and External ID.
--------------------------------------	--

Text Search	This expands to include Any Word, Content and Title.
--------------------	--

Trays and Labels	This expands to include Due Tray, Favourite, My Documents and My Containers.
-------------------------	--

6 Navigating and Viewing

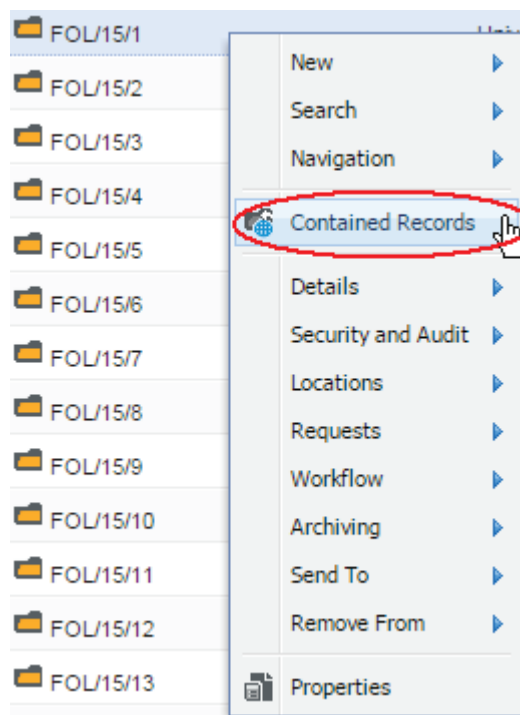
The Navigation function in HP Records Manager provides access to records that are connected to each other through Containers (folders), Contained Records (attached documents) and/or Parts.



The navigation options will only be available if the relevant function has been used, e.g. the document has been placed in a container.

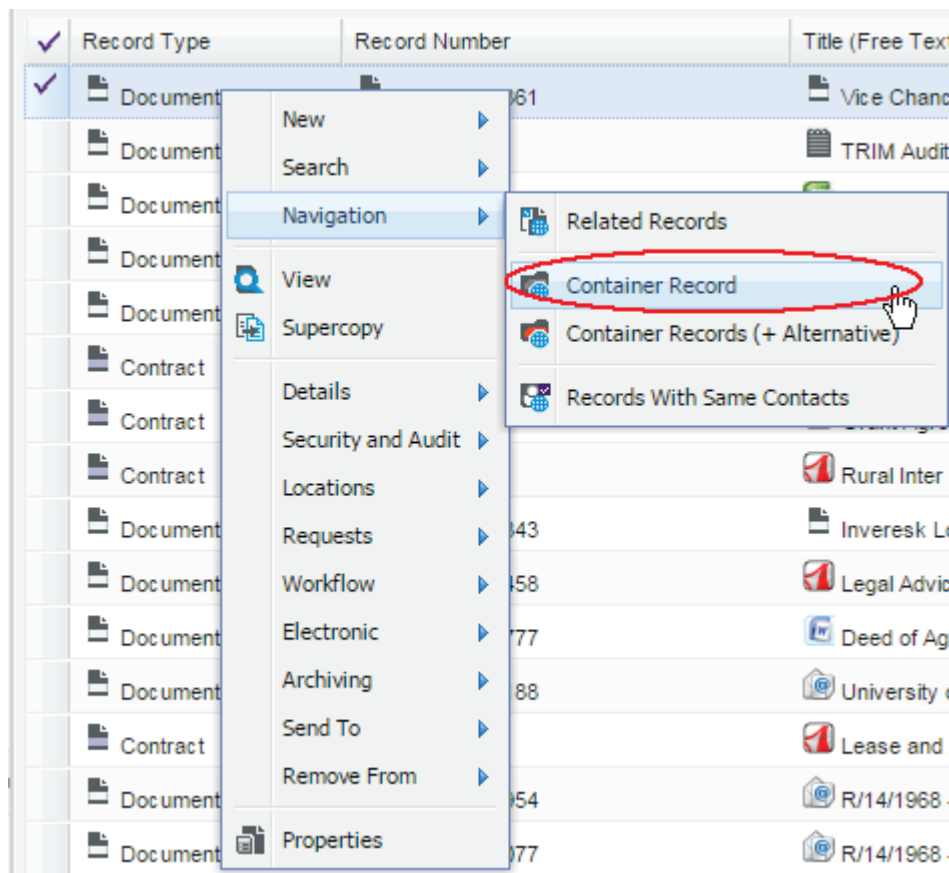
6.1 Navigate to documents attached to a folder

1. Search and highlight the file.
2. In the list pane, right mouse click and select *Contained Records*.



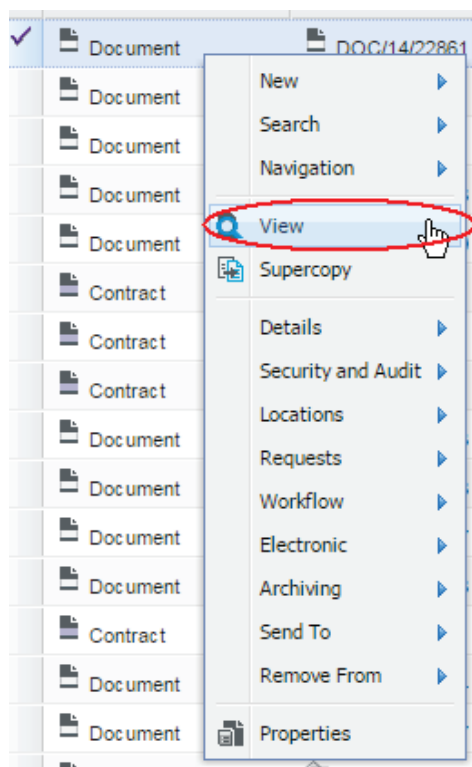
6.2 Navigate to a folder from a document

1. Search and highlight the file.
2. In the list pane right mouse click and select *Navigation > Container Record*.



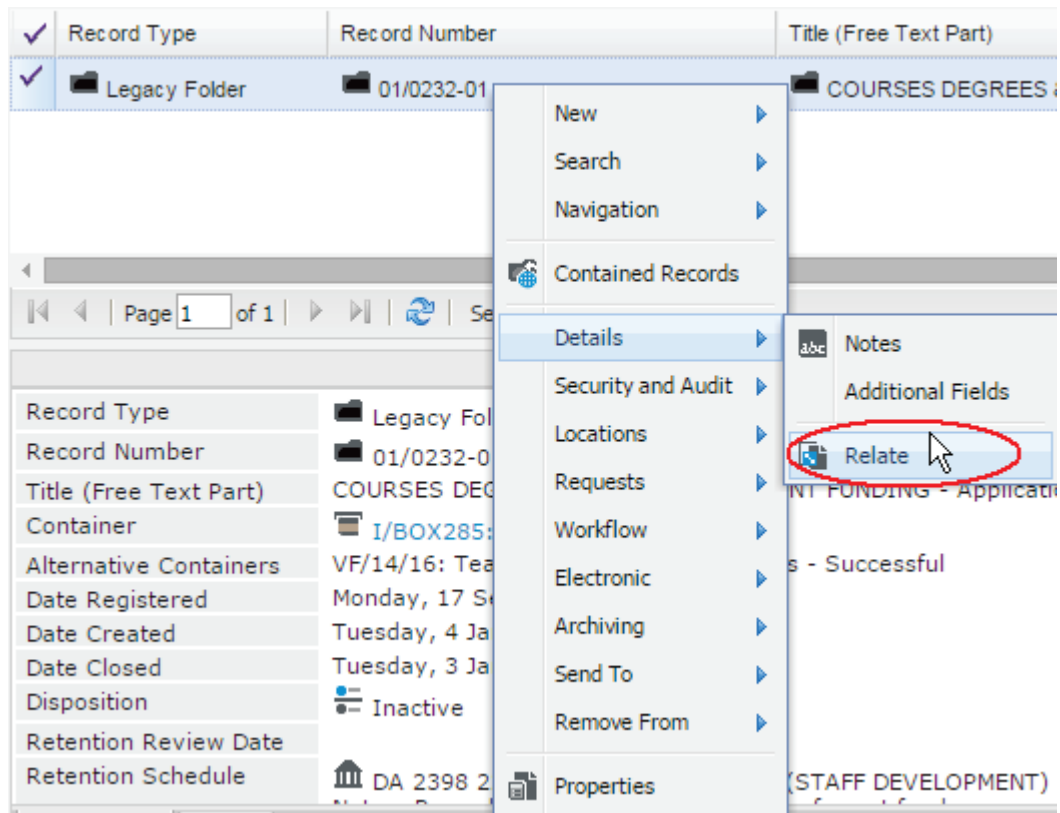
6.3 Viewing a document

1. Search and highlight the document.
2. In the list pane right mouse click and select *View*.

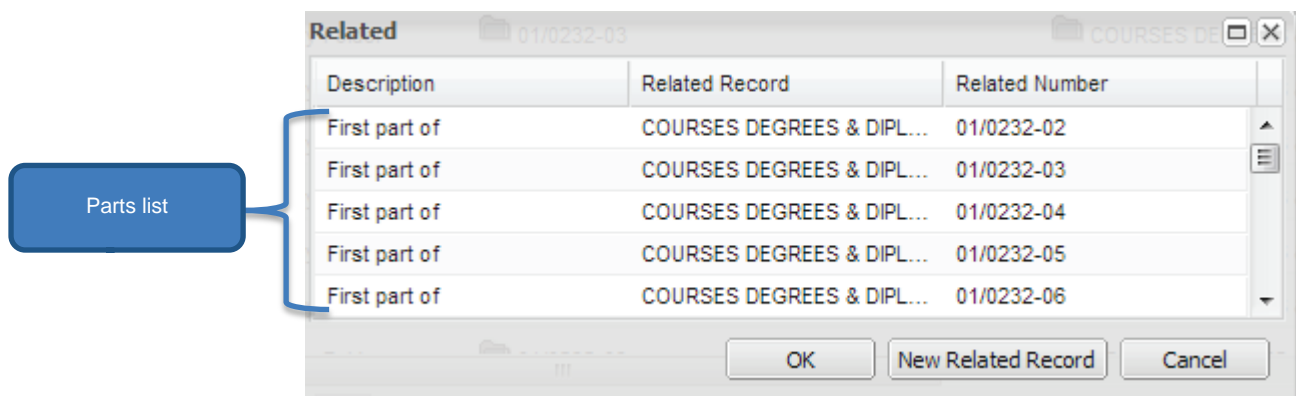


6.4 Viewing All Parts

1. Search and highlight the folder.
2. In the list pane, right mouse click and select *Relate*.



All parts and other related records will be listed.



7 Locations

Locations (or contacts) are used as an identifier to indicate:

- The assignee of a record
- The ownership of a record
- The home or storage location of a record
- Who registered the record

7.1 Locations / Contacts

Locations or contacts in HP Records Manager are identified by a green or red icon.



Green icons indicate internal staff members, positions, groups or organisations.

Internal locations are structured into a hierarchy which mirrors the University organisational structure as closely as possible.

Internal locations are managed by RMU Staff and HPRM Liaison Officers who rely on notification of changes from University business areas.



Red icons indicate external people, positions or organisation locations. These include individuals such as students, or organisations such as businesses or agencies.

7.2 Location Types

There are location types in HPRM that enables the capture of metadata linking contact location information to records. These location types are:

Assignee Location

Assignee Location applies to hardcopy records and indicates the current location of that record.

The Assignee Location for an electronic folder will be the same as for the folder in which it is contained.

Home Location

The Home Location for a hardcopy folder indicates the storage location for the folder.

The Home Location for an electronic folder will be the same as the Owner Location (usually the Business Unit).

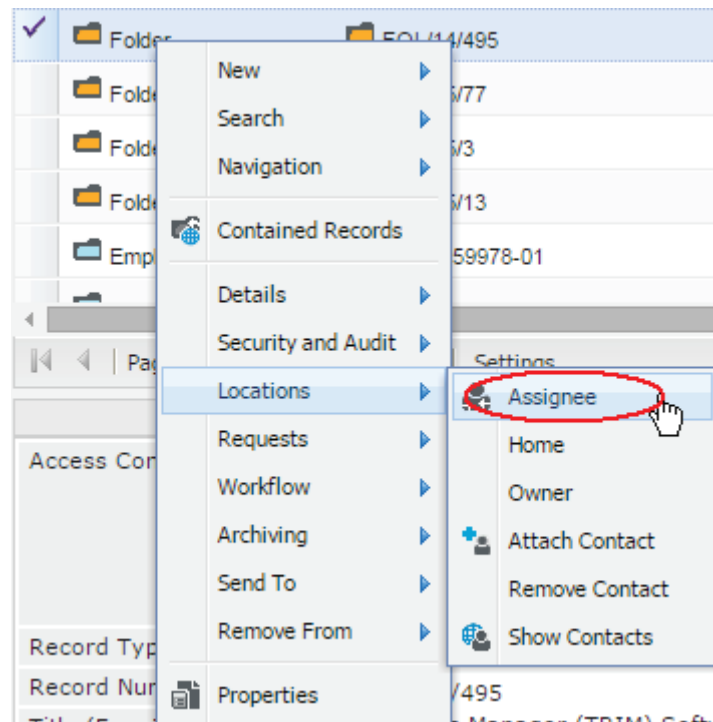
7.3 Changing the Assignee of a Record

The assignee is an indicator of the current location of a hardcopy folder or a document if it is not physically attached to a folder.

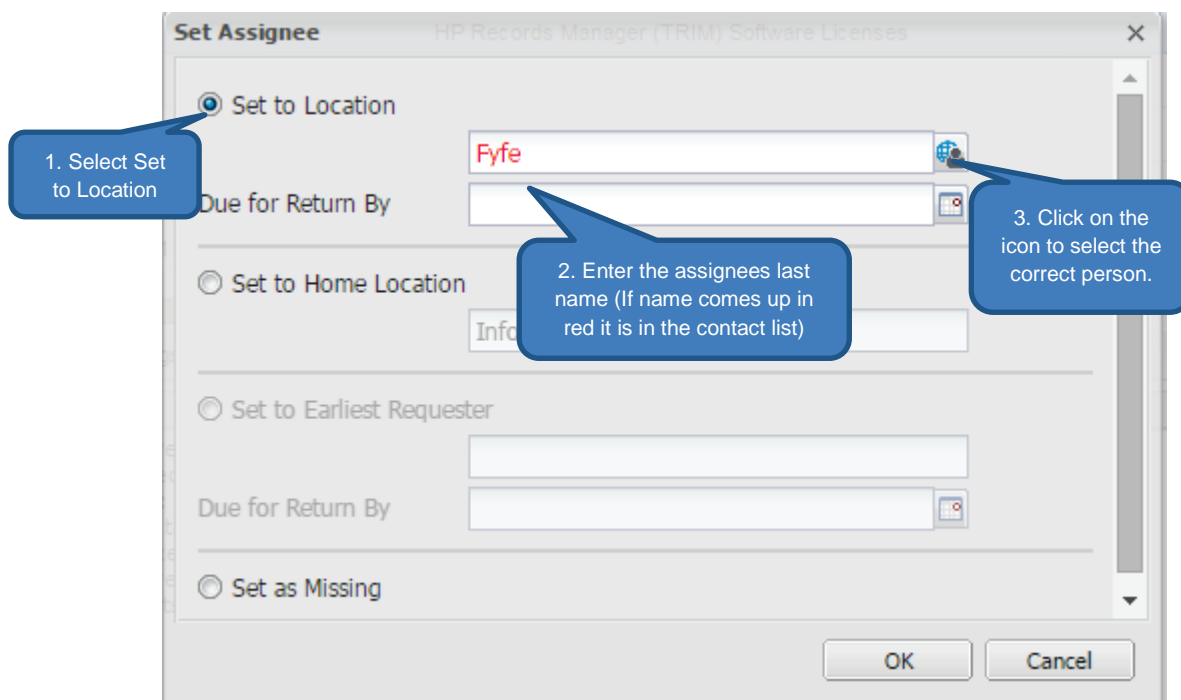
Tip: The In Tray in the Shortcuts Toolbar on the left of the screen (under the Trays Tab) is a quick reference to folders/documents that are assigned to your profile.

To change the assignee:

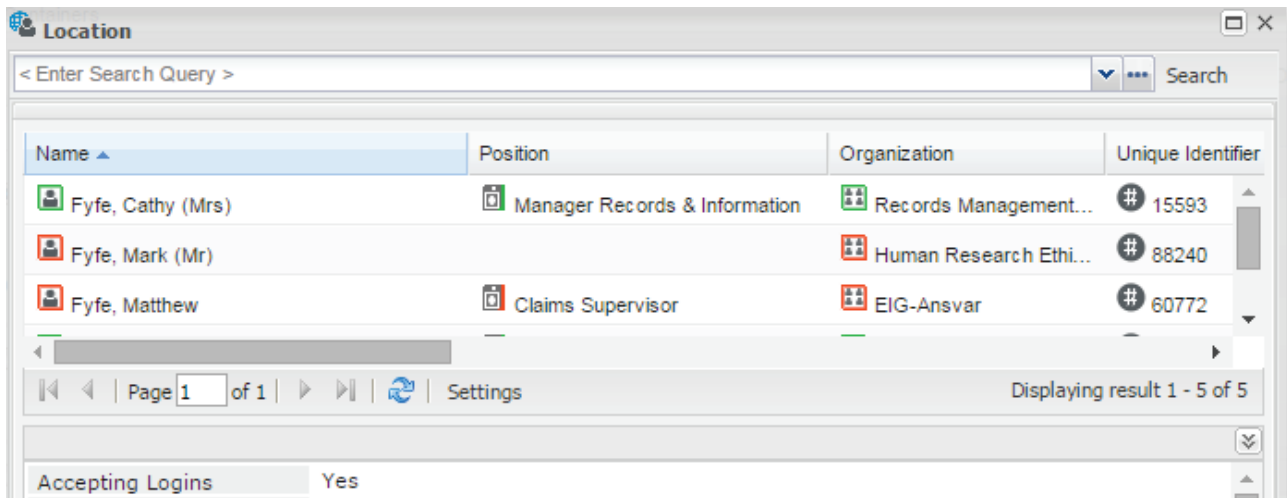
1. Search and highlight the folder.
2. Right mouse click and select Locations > Assignee.



3. Select the *Set to Location* radio button.
4. In the blank field under the *Set to Location* radio button, enter the last name of the new Assignee and click on the icon at the end of the field. If the name comes up 'red' it means there is someone in the locations/contacts table with that name.



5. Search and select the matching (green internal) name from the contact list. Ensure that they are linked to the correct position as some people may have multiple roles.



6. Select required person and Click on OK.
7. Click on OK again in the Set Assignee screen.

8 Access Controls

Only staff members that are included in an access control group can access certain types of records, e.g. only Human Resources staff members have access to Employee folders and documents.

Access restrictions are placed on Folders, and documents contained within those folders inherit the same restrictions.

Access is based on:

- The sensitivity or confidentiality of the content of the record and can be set for individual documents as required.
- Your log on profile.

8.1 Access Control

The access controls in HP Records Manager are grouped into seven functions as listed in the diagram below:



These may be different for each Record Type depending on requirements.

8.2 Changing and Applying Access Controls

The Web Client does not enable amendment of Access Controls. When a document needs access control applied which is different to the folder it is contained in, please contact your HPRM Liaison Officer or the Records Management Unit (RMU.Staff@utas.edu.au).

9 Registering Documents

9.1 Record Titling Conventions

The advantages to standardising naming conventions for documents include:

- Improving access and sharing of documents
- Reducing redundancy or duplication of documents
- Avoiding loss of information
- Enabling you to identify and find the latest draft or the desired version of a document
- Naming documents quickly and easily
- Understanding the content of a document without needing to open it

Further information can be found in the '[TRIM Data Entry Standards](#)' available on the intranet.

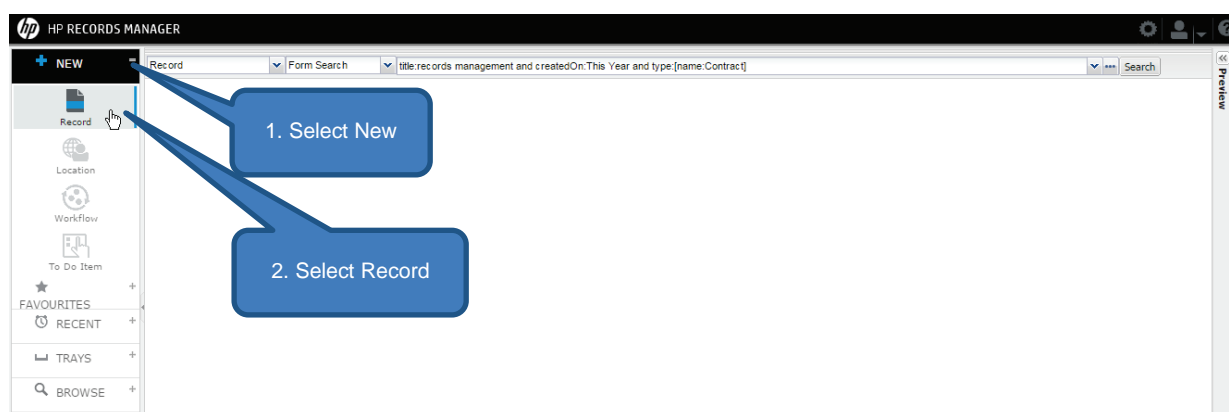
Document Naming Conventions

WHAT IS IT	+	WHAT'S IT ABOUT	=	DOCUMENT TITLE
Contract for the provision of cleaning services	+	Provision of Cleaning services at Corporate Services Building by ACME Pty Ltd in 2012	=	Contract – Provision of Cleaning Services – Corporate Services Building - ACME Pty Ltd - 2012
Advertising Brochure	+	Courses offered by University of Tasmania in 2014	=	Advertising Brochure – University of Tasmania Courses 2014
User Manual	+	How to use the HP Records Manager System	=	HP Records Manager User Manual
Meeting Minutes	+	Risk Committee Meeting 27 March 2013	=	Risk Committee Meeting Minutes 27 March 2013
Internal Memorandum	+	Change to Employee Travel Policy in February 2013	=	Internal Memorandum – Employee Travel Policy Change – February 2013
Agenda	+	Workplace Health and Safety Committee meeting July 2012	=	Workplace Health and Safety Committee – Agenda - July 2012
Statement of Duties	+	Administration Assistant	=	Statement of Duties – Administration Assistant
Template	+	Student Enquiry Response	=	Template – Student Enquiry Response

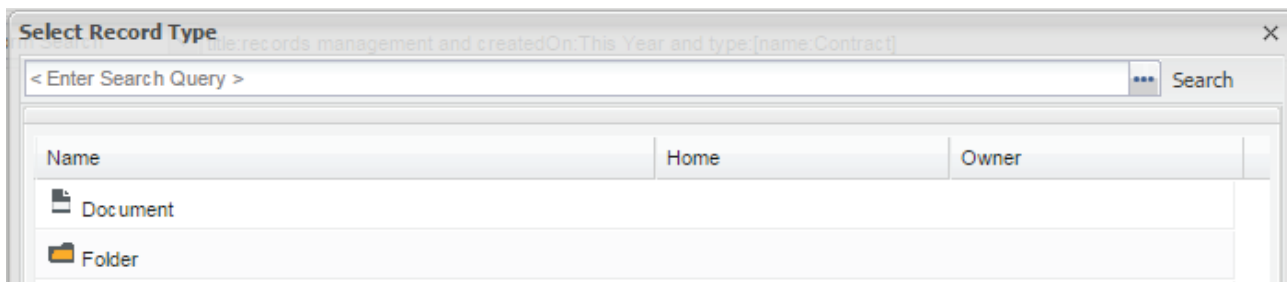
9.2 Registering a Document

To register a document into HP Records Manager, the user must have Contributor access or higher:

1. In the Shortcuts bar to the left of the screen, click on the *New* tab and select the *Record* icon.



2. Select the *Document* Record Type.




3. Click on *OK* and the entry form will be presented.

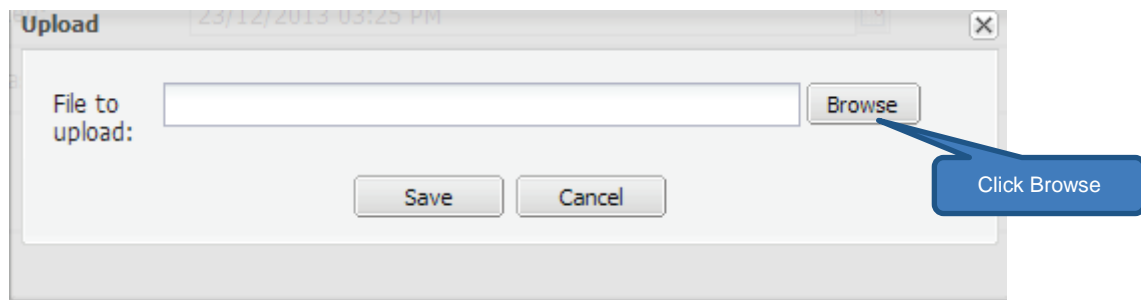
4. Fill in the metadata fields in the Document Information Tab.

* Denotes a Mandatory Field

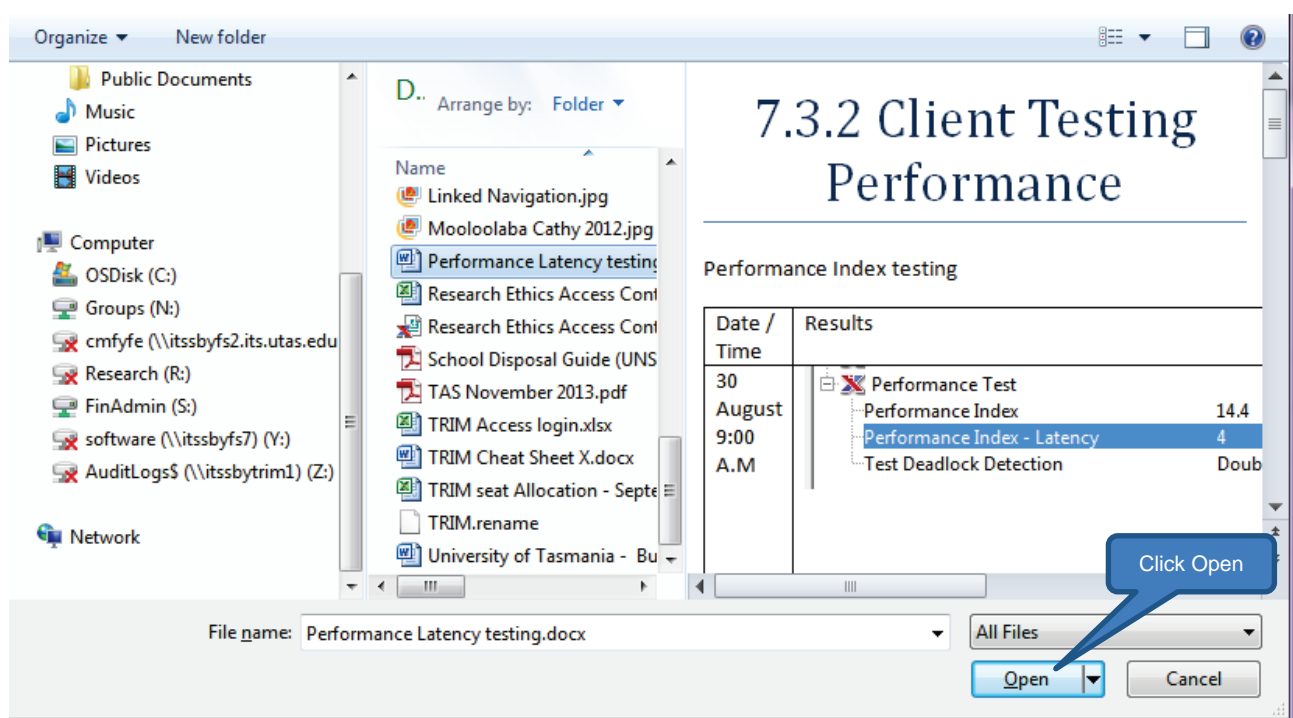
Tip: some fields will be automatically populated if you attach the electronic document first.

5. **Document Title*: enter the document details in line with any data entry conventions that may be applicable in the TRIM Data Entry Standards or internal procedures
6. *Date Written (Date Created)*: check the date reflects the date of the correspondence, report, or email. (Note that the Date Created will automatically populate for electronic documents so confirm that the date is correct)
7. *Security Classification*: set security to Public, Unclassified or Confidential. Refer to [TRIM Security Guidelines](#) for clarification of which to apply.
8. **Author/Signatory*: enter the author of the document, check that you have selected the correct person and that they are linked to the correct position.
9. *Addressee*: enter the addressee of the document or leave blank if not addressed to anyone.
10. *External ID*: apply the external reference if supplied.
11. **Folder (Container)*: Fill in the folder number or search for the folder using the KwikSelect button. 

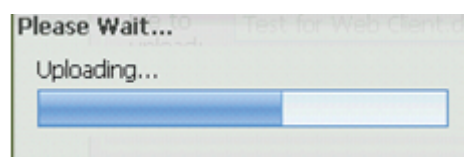
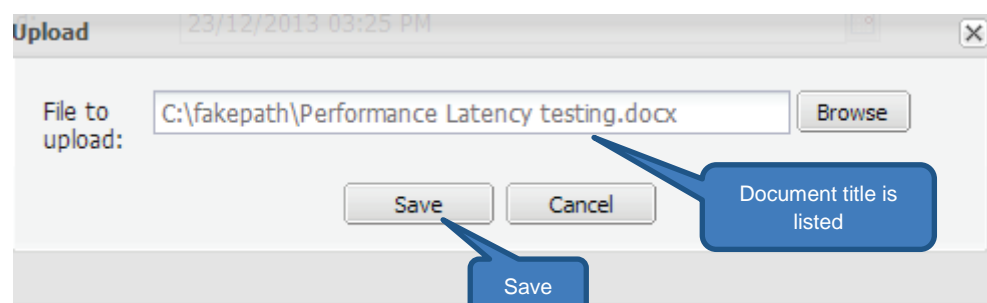
12. *Make Final (Read Only) Save*: leave tick box blank.
13. *Electronic Document*: Browse to attach the document.
14. In the Upload dialogue box, click on the Browse button.



15. Locate and highlight the document and click on Open.



16. The document will now be listed in the Upload dialogue box. Click on Save.



The screenshot displays the HP Records Manager web client interface. At the top, a status dialog box titled "Status" with a close button (X) in the top right corner contains the message: "File Performance Latency testing.docx has been successfully uploaded." Below this message is an "OK" button. A blue callout bubble points to this dialog box with the text "Status dialog box".

Below the dialog box is the main document form. At the top of the form is a search bar with a "Record" dropdown, a "Form Search" dropdown, and a text input field containing "< Enter Search Query >". To the right of the search bar are three small icons and a "Search" button. Below the search bar, a note states: "Fields marked with an asterisk(*) are mandatory." The form fields include:

- *Document Title: A text input field containing "Performance Latency testing". A red dashed border and a red exclamation mark icon indicate a validation error.
- *Date Written (Date Created): A date input field containing "12/1/2015 09:01 AM".
- *Security Classification: A dropdown menu showing "Unclassified".
- *Author / Signatory: A text input field containing "Fyfe, Cathy (Mrs)".
- Addressee: A text input field.
- External ID: A text input field.
- *Folder (Container): A dropdown menu showing "FOL/14/495".
- Make Final (Read Only) Save: A checkbox.
- Electronic Document: A text input field containing "Performance Latency testing.docx".

A blue callout bubble points to the "Electronic Document" field with the text "Uploaded document is now populated".

At the bottom of the form, there are two buttons: "Save" and "Cancel". A blue callout bubble points to the "Save" button with the text "Click on Save".

Below the buttons is a tabbed interface with three tabs: "Document Information" (which is selected), "Display and/or Modify Notes", and "Document History".

17. Click on Save.

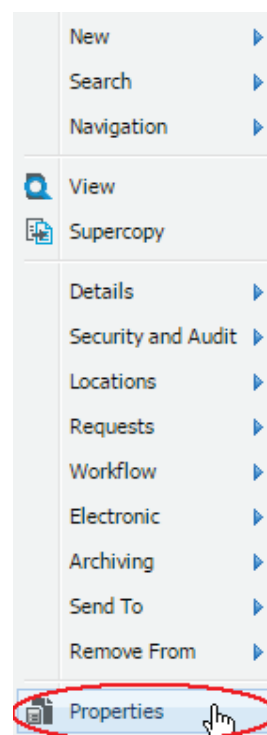
10 Modifying Records

10.1 Changing a Title

The title of a document can be changed if necessary, e.g. to correct a typing error.

To change a record title:

1. Search and highlight the record.
2. Right mouse click and select *Properties*.
3. Edit the *Document Title* as required.
4. Click on *Save*.

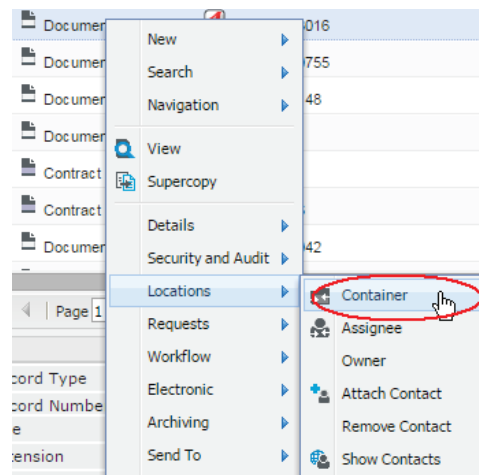
A screenshot of the HP Records Manager 'Document Information' form. The form has a header with 'Records' and 'DOC/14/221'. Below the header is a search bar with 'Quick Search' and 'favorite' buttons. The main form area contains several fields: '*Document Title:' with a text input field containing 'Seat Allocation User Types and computer identifiers including office platform'; '*Date Written (Date Created):' with a date input field showing '29/9/2014 04:47 PM'; '*Security Classification:' with a dropdown menu showing 'Unclassified'; '*Author / Signatory:' with a text input field showing 'Eyre, Cathy (Mrs)'; 'Addressee:' with a text input field; 'External ID:' with a text input field; '*Folder (Container):' with a dropdown menu showing 'FOL/14/362'; and 'Make Final (Read Only) Save:' with a checkbox. At the bottom of the form are 'Save' and 'Cancel' buttons. A blue callout bubble points to the 'Document Title' field with the text 'Edit the title'. Another blue callout bubble points to the 'Save' button with the text 'Click on Save'.

10.1.1 Changing the location of a Document to another Folder (Container)

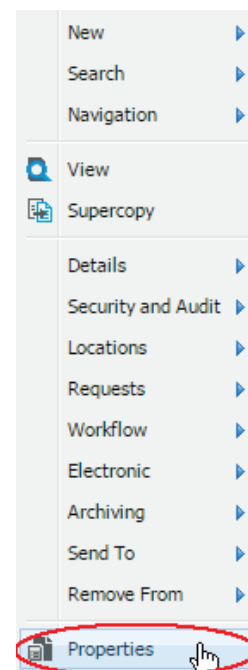
Note: not all users may have this permission.

1. Search and highlight the records.
2. Right mouse click and select *Locations > Container*.
3. Amend the Folder (Container) number.
4. Select OK.

OR



1. Search and highlight the record.
2. Right mouse click and select *Properties*.
3. Edit the *Folder (Container) as required.
4. Click on Save.



Records | DOC/14/2213

Record | Quick Search | favorite | Search

Fields marked with an asterisk(*) are mandatory.

*Document Title: Seat Allocation User Types and computer identifiers including office platform

*Date Written (Date Created): 29/9/2014 04:47 PM

*Security Classification: Unclassified

*Author / Signatory: Fyfe, Cathy (Mrs)

Addressee:

External ID:

*Folder (Container): FOL/14/362

Make Final (Read Only) Save:

Save Cancel

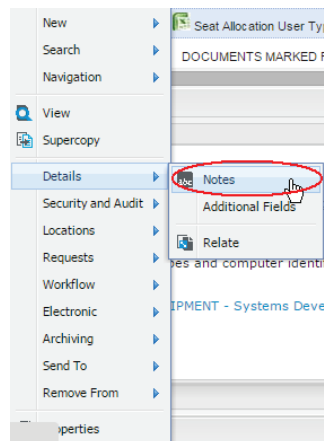
Document Information | Display and/or Modify Notes | Document History

10.1.2 Modifying/Adding a Note

Some users may not be able to modify or delete notes already saved into HPRM. Please contact your HPRM Liaison Officer or email RMU.Staff@utas.edu.au if you require a note to be modified.

1. Search and highlight the record.
2. Right mouse click and select *Details > Notes*.

OR



1. Right mouse click and select *Properties*.

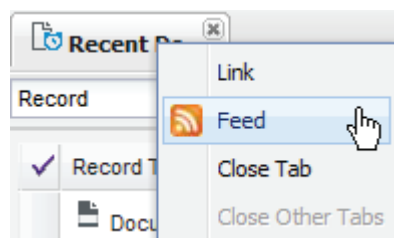
The screenshot shows the 'Records' window with the document 'DOC/14/221' selected. The 'Document Information' tab is active, displaying fields for Document Title, Date Written, Security Classification, Author/Signatory, Addressee, External ID, and Folder (Container). The 'Display and/or Modify Notes' button is highlighted with a red circle. The 'Save' and 'Cancel' buttons are visible at the bottom right.

2. Add / Modify *Notes* field and 'Insert User Stamp'.
3. Select *Save*.

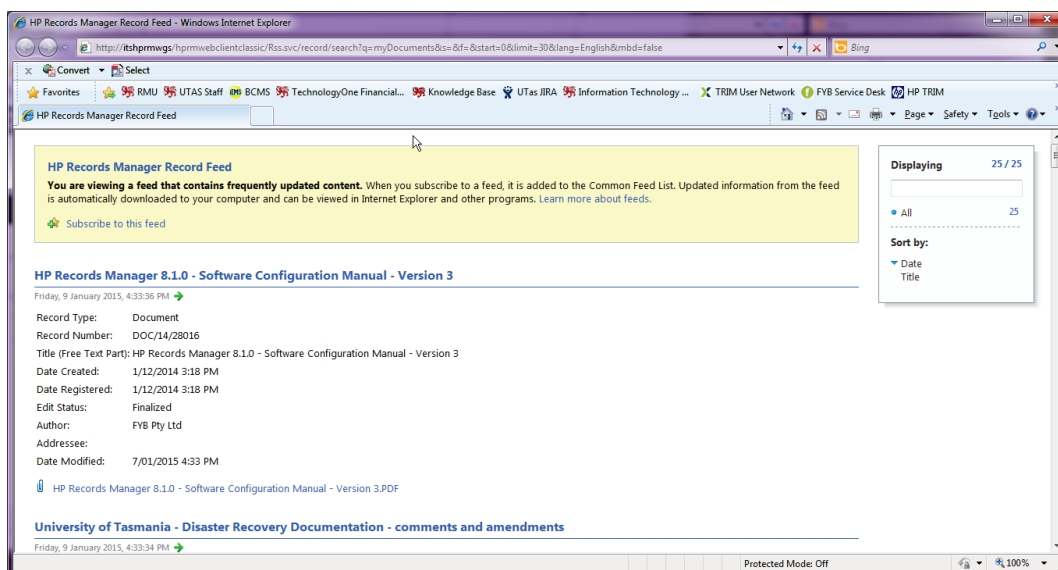
The screenshot shows the 'Set Notes' dialog box. A blue callout bubble points to the 'Insert User Stamp' button, stating 'Click on Insert User Stamp after modification'. Another blue callout bubble points to the 'OK' button, stating 'Click on OK'. The 'Notes' field is empty.

11 Printing Reports

You can print from the search results displayed via the RSS feed option. Note this functionality did not appear to be available through Chrome, but is available in Internet Explorer and Firefox.



Right Mouse Click on the *Search Results tab* and Select *Feed*.







In the HPRM Record Feed, Select the *Print* icon or drop down arrow to suit your requirements.





You can also use this screen to subscribe to the RSS feed via an RSS reader or Firefox's Live Bookmark functionality.







12 References

- Monash University HP TRIM 7.1 Web Client eRMS User Guide Student Files and Documents
- TRIM Document and Records Management Procedures
- [TRIM Training and Support Web page](#)

13 Appendix 1 – Record Types

RECORD TYPE	DESCRIPTION	NUMBERING
 Document	<p>Used to register documents, emails, images created and received by the University.</p> <p>Documents are to be placed into folders.</p> <p>Descriptions are to be in compliance with metadata standards.</p> <p>All HPRM users with the exception of 'Inquiry User' permissions can utilise this record type.</p>	<p>KKK/YYYY/GGGGG</p> <p>For example: DOC/14/123</p> <p>This number will be automatically generated by HPRM.</p>
 Contract	<p>Used to register fully executed contracts and agreements entered into by the University and third parties.</p> <p>Contracts are to be placed into folders.</p> <p>All HPRM Users with the exception of 'Inquiry User' can utilise this record type.</p>	<p>ZZZ/GGGGG</p> <p>For example: CON12354</p> <p>This number will be automatically generated by HPRM.</p>
 Folder	<p>Used to create and manage folders related to the conduct of University business.</p> <p>May be alternatively contained in a Virtual Folder, Fleet Virtual Folder, Project Virtual Folder, or Student Virtual Folder to group similar or related folders together.</p> <p>Folders are titled using the Business Classification Scheme (BCS).</p> <p>They act as a container and can hold registered Documents.</p> <p>Only members of the 'Group – Folder Creators' can create Folders in HPRM.</p>	<p>KKK/YYYY/GGGG</p> <p>For example: FOL/13/1</p> <p>This number will be automatically generated by HPRM.</p>
 Employee Sub Folder	<p>Used to create a pre-defined set of folders used to categorise the contents of the Employee Virtual Folder. Employee Sub Folders are linked to the Business Classification Scheme (BCS) and are titled using pre-defined titles.</p>	<p>KK/XXXXXX-01</p> <p>For example EF/123456-01</p> <p>Numbering based on 'parent' Employee Virtual Folder.</p>

RECORD TYPE	DESCRIPTION	NUMBERING
 Employee Virtual Folder	<p>Used to create individual Employee Virtual Folders.</p> <p>An Employee Virtual Folder is created for each staff member and holds personal information about their appointment and ongoing employment with the University.</p> <p>The folder acts as a container to contain a set of pre-defined Employee Sub Folders.</p> <p>Only members of the 'Employee Virtual Folder Creators' group can create Employee Virtual Folders.</p>	<p>KK/XXXXXX</p> <p>For example: EF/123456</p> <p>All Employee Virtual Folders will use the unique employee number issued by the Employee System "EF/" will be a constant pattern generated by HPRM.</p> <p>The employee number will need to be manually entered in HPRM on creation of the folder.</p>
 Fleet Virtual Folder	<p>Used to create and manage folders related to the management of the University fleet.</p> <p>Fleet Virtual Folders act as a container and alternatively contain Folders.</p> <p>Only members of the 'Fleet Virtual Folder Creators' group can create Fleet Virtual Folders.</p>	<p>XXXXXX</p> <p>For example: STY891</p> <p>This number is manually entered upon folder creation using the vehicle registration number.</p>
 Project Virtual Folder	<p>Used to create and manage folders related to the management of University Projects.</p> <p>Project Virtual Folders act as a container and alternatively contain Folders.</p> <p>Only members of the 'Project Virtual Folder Creators' group can create Project Virtual Folders.</p>	<p>KKK/YYYY/GGGG</p> <p>For example: PRO/13/1</p> <p>This number will be automatically generated by HPRM.</p>
 Student Virtual Folder	<p>Used to create and manage folders related to the management of University students.</p> <p>Student Virtual Folders act as a container and alternatively contain Folders.</p> <p>Only members of the 'Student Virtual Folder Creators' group can create Student Virtual Folders.</p>	<p>KKK/YYYY/GGGG</p> <p>For example: STU/13/1</p> <p>This number will be automatically generated by HPRM.</p>

RECORD TYPE	DESCRIPTION	NUMBERING
 Vacancy Sub Folder	Used to create a pre-defined set of folders used to categorise the contents of the Vacancy Virtual Folder. Vacancy Sub Folders are linked to the Business Classification Scheme (BCS) and are titled using pre-defined titles.	LLLAAAXXXX-01 For example: FINPRO0142-01 Numbering based on 'parent' Vacancy Virtual Folder.
 Vacancy Virtual Folder	Used to create individual Vacancy Virtual Folders. A Vacancy Virtual Folder is created for each position in the University and holds information regarding the development of the position and the selection process to fill the position. The Folder acts as a container to contain a set of pre-defined Vacancy Sub Folders. Only members of the 'Vacancy Folder Creators' group can create Vacancy Virtual Folders.	LLLAAAXXXX For example: FINPRO0142 The position number will need to be manually entered in HPRM on creation of the folder
 Virtual Folder	Used to group together records to provide a customised view of information stored in HPRM and as such can be used to group project related information or annual budgeting information etc. Virtual Folders act as a container and alternatively contain Folders. Only members of the 'Virtual Folder Creators' group can create Virtual Folders.	KK/YYYY/GGGGG For example: VF/13/1 This number will be automatically generated by HPRM.
 Archive Box	Used to contain inactive physical folders prior to destruction or transfer. Only members of the 'Archive Box Creators' group can create Archive Boxes.	KKK/YYYY/GGGGG For example: BOX/2013/123
 Legacy Sub Folder	Identifies record types utilised in previous system configuration that were sub folders. No longer utilised.	XXXXXXXX For example: 03/0127/01, AMS:09/1234/22-02
 Legacy Folder	Identifies record types utilised as Folders including 'Parent' folders in previous system configuration. No longer utilised.	XXXXXXXX For example: 03/0127, AMS:09/1234-02