

University of Sydney

# Records Online User Manual

For any questions please contact the Records Online Help Desk on either  
E: [recordsonline@sydney.edu.au](mailto:recordsonline@sydney.edu.au) or T: 9036 9537

8/5/2015

## Contents

1. Register as a new user .....	2
2. Accessing Records Online .....	2
3. Searching.....	3
3.1 Quick Search.....	3
3.2 Advanced Search.....	3
3.3 Search Results .....	4
4. Record Properties – Viewing a File or Document .....	4
4.1 Administrative File – Record Properties .....	5
4.2 Student File – Record Properties .....	5
4.3 Assignee Locations .....	6
4.4 Document – Record Properties.....	6
4.5 Viewing a Document .....	6
5. Setting Favourites .....	7
6. Creating an Administrative File.....	8
7. Allocating Access to a File .....	10
8. Adding Documents to a File .....	11
9. Editing a Document.....	12
10. Requesting Files .....	13
11. Transferring a File.....	13
12. My Records.....	14
13. Appendix .....	15

## 1. Register as a new user

### ***You will need a Unikey to register for records online***

To access Records Online all staff, including any casual staff, will require their own account.

To register login to the [Self Service Portal](#) using your Unikey, click the ICT Services hyperlink, then click the UniKey and Account Management hyperlink, and select Records Online - New User. Once the required fields have been completed, select Order to submit the request.

New user registrations can take up to 24 hours to complete. A confirmation email titled "Welcome to Records Online" will be sent to the user's email account when access has been finalised.

If you are unable to access the online application form or find the details of a user in the Self Service Portal, please contact the Records HelpDesk on ext. 69537 or send an email to [records.online@sydney.edu.au](mailto:records.online@sydney.edu.au)

If you are completing registration for a colleague, make sure that their details are entered in the **Requested For** field

## 2. Accessing Records Online

***Do not use any account other than your own to access Records Online***

Navigate to <https://recordonline.sydney.edu.au/>

Click Log in to Records Online

You will be asked to Authenticate, enter your unikey and password.

Click OK

*Depending on which browser you use, you may be given the option to save your password for future sessions*

You are no longer required to enter MCS before your unikey

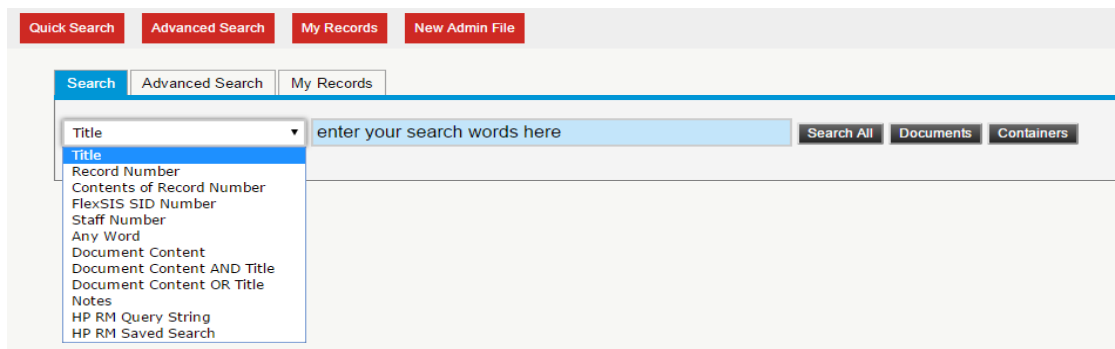
### 3. Searching

*Records Online has both a quick and advanced search for University Files and Documents*

#### 3.1 Quick Search

The Quick Search fields contain the most commonly used search methods

To search for a file, select the desired search field using the drop down box. For an explanation of these search fields see appendix 13a



Enter the search data and select the search method

Search Method	Description
Search All	Will search both containers and documents
Documents	Will search documents only
Containers	Will search containers only

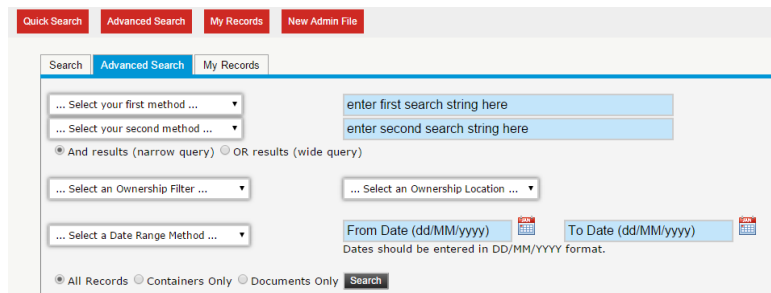
#### 3.2 Advanced Search

*In the Advanced Search Field, you can search across multiple search fields. For an explanation of these search fields, see appendix 13b*

Click the Advanced Search Tab

Change to the desired search method, using other fields as necessary

The search can be refined to show all records, or just containers or documents



When searching within a date range, the date format must be **DD/MM/YYYY** or you will get inconsistent results

Example of searches across multiple fields		
Searching for	Search field 1	Search field 2
Records created by you on a particular date	Created By	Date registered
An administrative file related to a student	Title	FlexSIS SID number

### 3.3 Search Results

The following screen will be displayed with your search results

The blue cross indicates that the record has electronic contents

### 4. Record Properties – Viewing a File or Document




Record Properties will give you details of a file, including the Record Number, Title, Owner Location and the Assignee. The Record Properties will vary with the type of record you are viewing.

If there are documents contained in a file, you will be able to see them in the Contents section of the record properties.

Property	Value
Record Number	DOC2015/1408049
Title	test doc
Container	[REDACTED]
Document Details	1.38 MB bytes PDF File PDF
Checked Out Status	Available
Date Created	13/Sep/2015
Date Last Updated	13/Sep/2015
Creator	[REDACTED]
Record Type	Document




## 4.1 Administrative File – Record Properties

The Record Properties page will display the following details relating to Administrative files.

Record Properties		Requests	File Transfer
Property	Value	Refresh	
Record Number	2015/3500		
Title	UAT - Test File		
Title (Structured)	ADMINISTRATION & SUPPORT - Finance administration - Accounts payable - UAT - Test File		
Owner Location	 Records Management Services		
Assignee Location	 [Electronic]		
Disposition	Active		
FlexSIS SID Number	0		
Staff Number	0		
Date Created	05/Aug/2015		
Record Type	 Administrative File		

## 4.2 Student File – Record Properties

The Record Properties page will display the following details relating to Student files.

Record Properties		Requests	File Transfer
Property	Value	Refresh	
Record Number	299900001-01		
Title	STUDENT, TEST TEST		
Owner Location	 [The University of Sydney]		
Assignee Location	 [Electronic]		
Disposition	Active		
FlexSIS SID Number	299900001		
Date Created	07/Jan/2005		
Date Closed	04/Mar/2015		
Date of Birth	22/Jun/1914		
Record Type	 Student File		

### 4.3 Assignee Locations

Assignee Locations	Description
Electronic	No physical file exists
At Home Location or Warehouse 1 or Warehouse 2	A physical file exists and is located at Records Management Services
Marked to a staff member or faculty storage area	A physical file exists but is marked out.

For a more detailed description of Assignee Locations, see appendix 13 e

### 4.4 Document - Record Properties

Record Properties will give you details of a document, including its Record Number, Title, Container, Checked Out Status, Date last updated and its Creator.

★ Document DOC2010/151119 UAT Test Document

Record Properties View

Property	Value	Refresh
Record Number	DOC2010/151119	
Title	UAT Test Document	
Container	[REDACTED]	
Document Details	5.86 KB bytes PDF File PDF	
Checked Out Status	Available	
Date Created	09/Apr/2010	
Date Last Updated	28/Aug/2015	
Creator	Neil Bateman	
Record Type	Document	

### 4.5 Viewing a Document

Click the View tab to view the contents of a document. The document will automatically be displayed and viewable within Records Online.

★ Document DOC2015/1258893 UAT's test document

Record Properties View Check Out/In

Update View Inline Download a Read Only Copy Expand

Technical drawing showing components like DP/1, CHP/1, 240V, 24V, CT/1, and PAGE FOR CONTROLS.

## 5. Setting Favourites

Setting favourites is easy.

Click on the star next to the record or location/s – once the star is tagged (turned from grey to blue), it (the record, person, or location) will be added to your favourite.

Record #	
View 2015/3500	
View E15-392	
View E15-390	
View 2015/3326	
View 2015/3319	
View 299900001-01	
View DOC2015/1067442	

Favourites can be applied to: Individual users, groups, locations, classifications, business units, documents and files

To remove a favourite, click on the blue star. When the star turns grey, the record, classification or location will have been removed from your favourites.

You can view all of your favourite documents and files within the My Records Tab, as seen below.

The screenshot shows the 'My Records' tab in a software interface. At the top, there are navigation tabs: 'Search', 'Advanced Search', and 'My Records' (which is selected). Below these are several buttons: 'My Documents', 'My Containers', 'My Favorites' (highlighted with a red box), 'All My Documents', 'Checked Out', 'Due or In Tray', and 'My Requests'. The main content area displays a list of records with columns for 'Record #' and 'Title'. Each record has a plus icon, a star icon (blue for favourites, grey for non-favourites), and a 'View' button. The records listed are:

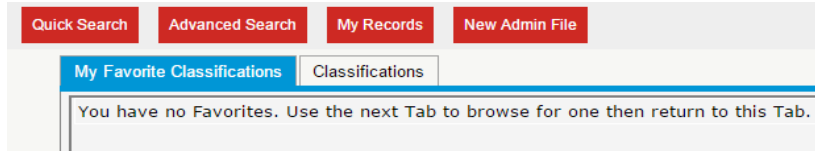
Record #	Title
2015/4829	ADMINISTRATION & SUPPORT - Legal matters - Advice - test new file
E15-266-7	User Manuals, Guides & FAQs
E15-266-6	Go-Live Planning
E15-226-11	Alpha -West Outlook Add-In
E15-266-5	Training
E15-226-6	Application Testing Schedule & Error Log
E15-226	TRIM 8 II Upgrade Testing
DOC2015/1271987	test doc 2
DOC2015/1265991	Records Online User Manual_Draft

At the bottom of the list, there are navigation controls: 'Link to This Search', '<< First', '< Previous', 'Next >', 'Last >>', and '1 to 9 of 9'.



## 6. Creating an Administrative File

Click on New Admin File tab, where you will be directed to My Favourite Classifications tab - **the first time that you log in, this tab will be empty**



Click on the Classifications tab

Click through for the appropriate file classification; taking note that some classifications cannot be chosen at a particular level; you must select a lower level to create the file. There are two icons that will differentiate between the levels:

Icon	Explanation
	You cannot create a file at this classification level - you will need to select a lower level
	You can create a file at this classification level

Once the appropriate classification has been selected, the creation details along with a brief description will appear to the right of the screen.

**Create File** ADMINISTRATION & SUPPORT - Information management - Records management

**Notes** Covers the activities of creating, capturing, registering, classifying, indexing, storing, retrieving and managing access to, records through to their ultimate disposal. (Keyword AAA modified) Includes development and review of policies for records management.

**Default Record Access**

Click Create File and then complete the required fields\*

To save this classification for future file creations, click on the star next to the classification/create file button. The star will become blue and the classification will appear in your My Favourite Classifications tab for future file creations.

\* Mandatory fields can be identified by an asterix

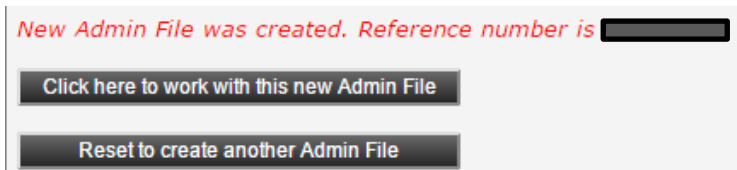
Your Business Unit will be the current default. If this requires changing, you can do so by searching for the appropriate business unit location in the lookup box. If you no longer work in the business unit displayed (as your default), please advise Records Online.

If your default Business Unit is incorrect, please contact  
Records Online T: 9036 9537

Make any changes to the access of the file (See section 7 – Setting Access to a File)

Click, Create the new Admin File

You will receive the following confirmation message



If you are not entitled to access the chosen classification, on selecting 'Create the new Admin File', you will receive an error message – **The Access Control Attached to this Classification Prevents you from using it for this purpose.** Please contact Records Online for further information

You will be given two options:

Option	Description
<i>Click here to work with this new Admin File</i>	This will enable you to keep working with the file – adding documents, requesting a hard copy file etc.
<i>Reset to create another Admin File</i>	This will allow you to create another Admin File with the <b>same classification.</b>

## 7. Setting Access to a File

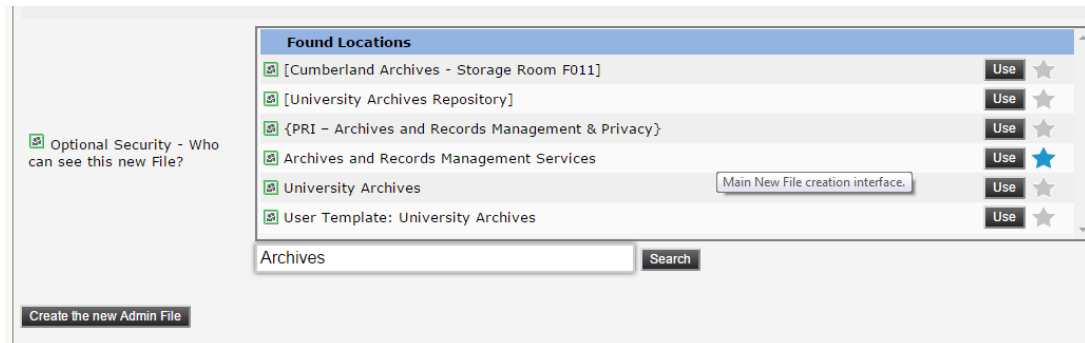
When creating a file, its default access can be changed

Search for the correct location and click Search

To set a location as a favourite, click the grey star that corresponds with the person or group

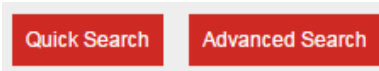
Click the Use button next to the person or group that you wish to add. You can search and add locations as many times as required, until the appropriate access has been set

Once the access has been set, proceed to create the file by selecting, Create the new Admin File



## 8. Adding Documents to a File

Search for the appropriate file and then click the View button



Click on the Add Document bar



Enter the title of the document; or if the title is to remain the same as the file name, leave blank

Enter a reference if required

Title	<input type="text" value="Enter the title for the document. Leave blank to use Documents File Name."/>
External Reference	<input type="text" value="External Reference Value."/>

Select the author by entering a name in the search field, and click search

Author	<input type="text"/>
	<input type="text" value="Location Text or leave blank for Favorites"/> <input type="button" value="Search"/> or <input type="button" value="Make me the Author"/>

Select whether the document will be a Draft or Final version

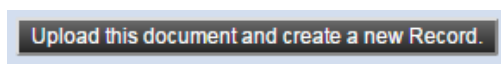
Document Version is	<input type="radio"/> Draft
	<input checked="" type="radio"/> Final

If a document is final, it can only be edited by contacting the Records Online Help Desk

Click Choose File to select the document to be added to the file (**Do this step last**)

Select the file you wish to upload as a new document. <b>Hint!. Do this last.</b>	<input type="button" value="Choose File"/> No file chosen
--	---

Click Upload this document and create a new record



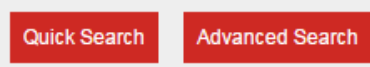
Once the document has been uploaded successfully, the following message will appear, and you will be given the option to reset to upload another document

<input type="button" value="Reset for another Upload"/>
Document was uploaded as <a href="#">DOC2015/1068709</a>

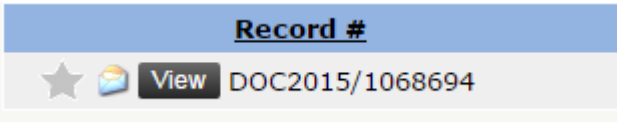
To add another document to the same file, click **Reset for another Upload**

## 9. Editing a Document

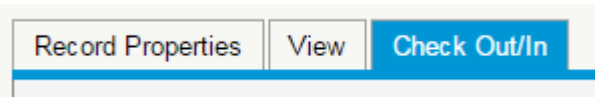
Search for the document you want to edit using either quick search or advanced search



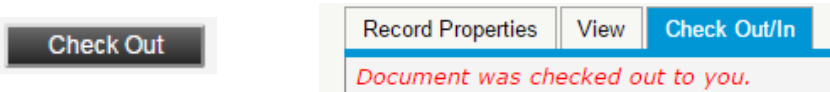
Click on the View button to open the document



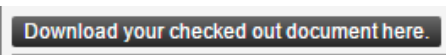
Click on the Check Out/In tab



Click the Check Out Button – You will get a message stating that the document has been checked out to you



Select Download your checked out document here



Want to cancel the checkout?  
You can do this by selecting  
**Undo my checkout**

Undo my Checkout

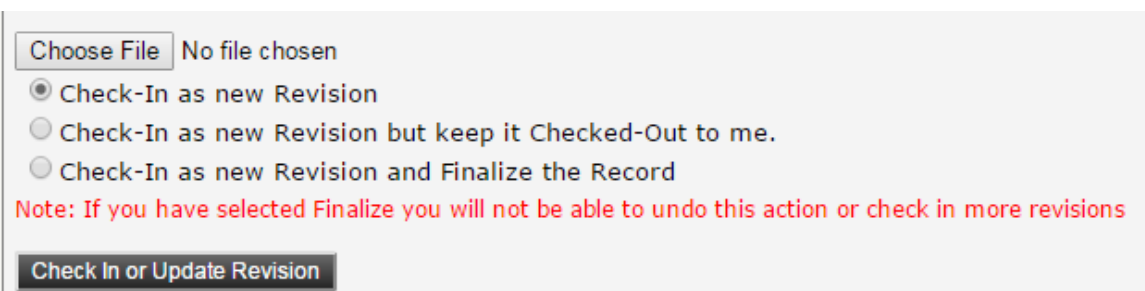
Make the required changes to the document and save to My documents or your desktop

To check the document back into Record Online, click Choose File and select the document you previously edited

Select either

- Check-in as new revision
- Check-in as new revision but keep checked out to me
- Check-in as new revision and finalize the record

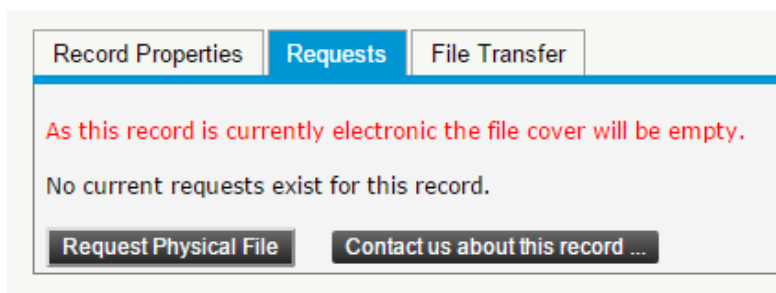
Click Check In or Update Revision



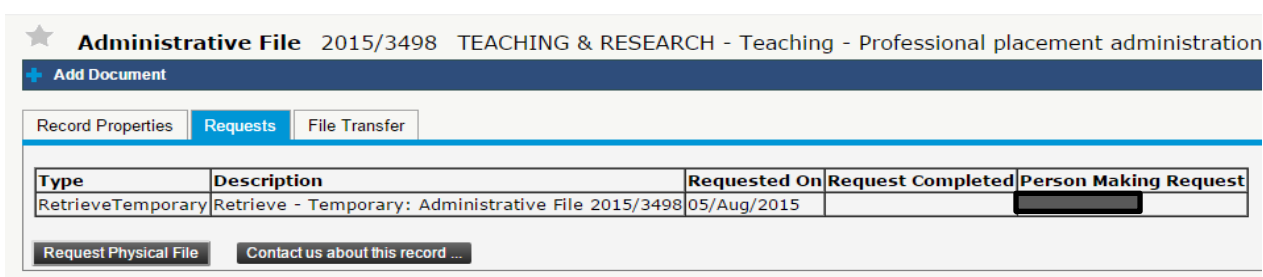
## 10. Requesting Files

To request a file, go to the Requests tab and select Request Physical File

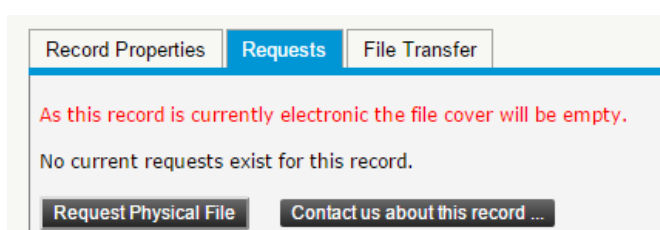
Have a question about a file or want to cancel a request? Click Contact us about this record to send Records Online an email.



Once a file has been requested, you will see your name in the Person Making Request Field



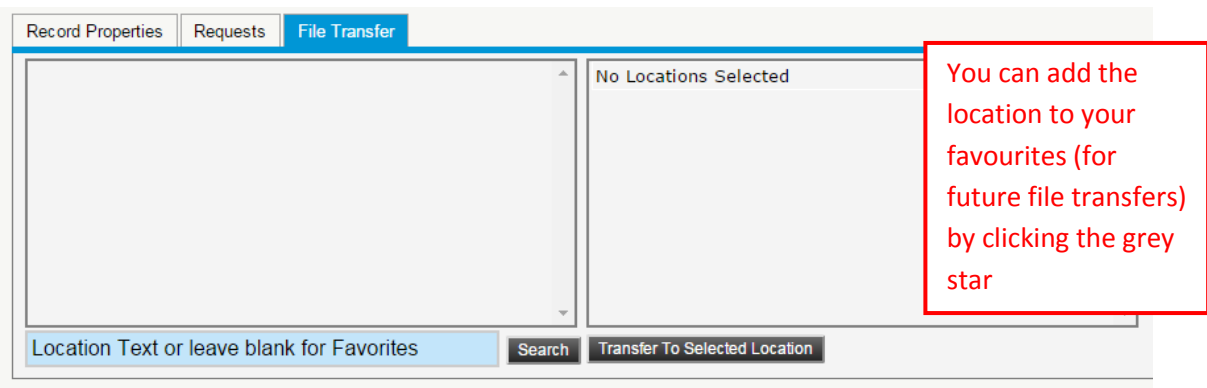
**Note:** As Records Management Services relies upon the internal mail to deliver most of our files, you should be aware that a file/s will usually take 2 - 3 days to be delivered. If you require a file urgently, please contact us and we can arrange for the file/s to be collected from one of our offices (A14, K07, G12). **Contact us on:** E [recordsonline@sydney.edu.au](mailto:recordsonline@sydney.edu.au) or T +61 2 9036 9537



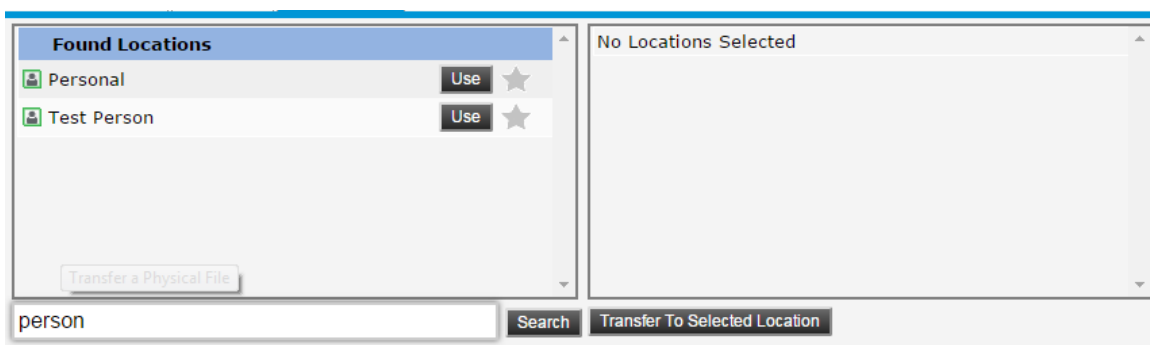
**Important:** If you have requested a file which is currently assigned as electronic, you will see the following message displayed: 'As this record is currently electronic the file cover will be empty'

## 11. Transferring a File

Click on the File Transfer tab and then search for the location the file is to be transferred to



Select the location by clicking Use and then click Transfer to Selected Location

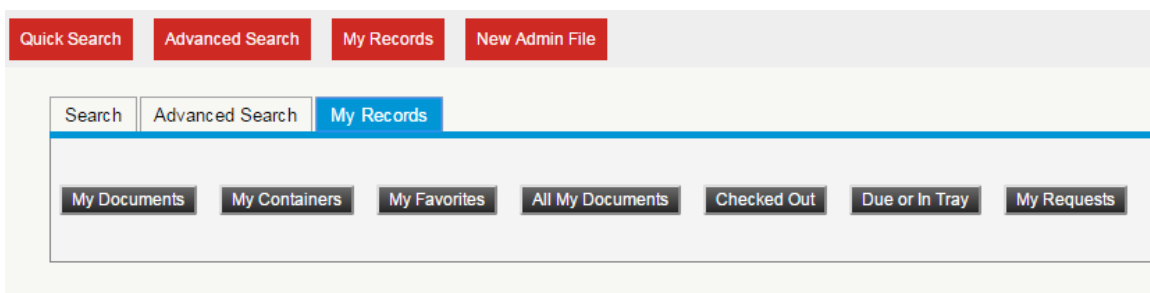


**Note:** If you transfer a file and the change is not immediately seen in the Record Properties tab, click Refresh (F6) to refresh the webpage

To transfer a file to a favourite location (you have previously used/saved). Click search - there is no need to enter a value into the search field

## 12. My Records

My records is a short cut to records you have; set as favourites, recently worked with, have marked or assigned to you, or have checked out to you



<b>Title</b>	<b>Description</b>
My Documents	Shows the last 25 documents you created
My Containers	Shows the last 25 containers you created
My Favourites	Shows your favourite documents and files
All My Documents	Shows all documents and files you have recently created
Checked Out	Shows all documents checked out to you
Due or In Tray	Any files or documents in your due or in tray
My Requests	Any files that you have currently requested

## 13. Appendix

### a. Search Fields – Quick Search

<b>Search Field</b>	<b>Description</b>
Title	Search by title only
Record Number	Search by record number
Contents of Record Number	Search and displays contents (documents/files) within a record
FlexSIS SID Number	Searches for the FlexSIS SID number
Any Word	Searches for any word
Document Content	Searches by words within a document
Document Content AND Title	Searches by words within a document and by document title
Document Content OR Title	Searches by words within a document or by document title
Notes	Searches within the notes field
HP RM Query String	Advanced search method using string searches
HP RM Saved Search	Search with pre-defined searches created within RM8

### b. Search Fields – Advanced Search

<b>Search Field</b>	<b>Description</b>
Building Code	Searches for records with building code within its metadata
Contained within	Will search for documents contained electronically within a file, or for files contained within a box
Ethics reference number	Search by Ethics reference number
FLEXSIS SID number	Searches for the FlexSIS SID number – this can be contained in Administrative files that relate to a student
Foreign Barcode	Search by Foreign Barcode number
Insurance claim reference number	Search by Insurance claim reference number (metadata field)
Project number	Searches by project number (metadata field)
Record number	Search by record number
Requisition number	Search by Requisition number (metadata field)
RIMS project number	Search by RIMS project number (metadata field)
Staff number	Search by Staff number



Title	Search the title of the file
Title or note word	Search for words in title or notes field
TRIM barcode	Search with the barcode of the file

**c. Ownership Filters – Advanced Search**

Search Field	Description
Addressed To	Will search/filter records addressed to a particular person
Assigned To	Will search/filter records assigned to a particular person
Authored by	Will search/filter documents authored by a specific person
Check Out to	Will search/filter documents checked out to a specific person
Contact is	Will search/filter records by an assigned contact
Created by	Will search/filter records created by a specific person
Home Location is	Will search/filter by the Home Location
Other Contact	Will search/filter for records with an assigned contact
Owner location is	Will search/filter by the owner location
Representative is	Will search/filter records by its representative

**d. Ownership Locations – Advanced Search**

Search Field	Description
Me	Records with me as an owner location
My Unit	Records with my business unit/faculty as an owner location

**e. Locations**

Location	Description
Electronic	<p>No physical file exists. If documents exist they can be viewed electronically. If documents need to be added to this file, they can be scanned and added electronically. Alternatively, if physical filing is practiced in the users' business unit, if required a hard copy file cover can be sent out by clicking Request Physical File, and documents can be added physically</p> <p><b>Note: This file cover will be empty and will contain no documents. Please use Records Online to check electronic documents in this file</b></p>
At Home Location	<p>If the location is [Records Management Services A14] or [RMS – Telfer Building Secondary Storage] or At Home Location: Warehouse 2 or At Home Location: Warehouse 1, the file is a physical file located at Records Management Services. Click Request Physical File to have this file sent via the University's internal mail service.</p> <p><b>Note: This file may have both physical and electronic documents</b></p>

	<p><b><i>attached. To view this files electronic documents, please use Records Online.</i></b></p>
<p>Marked to staff member or faculty storage area</p>	<p>If the location is another university staff member or a faculty storage area, contact the staff member or faculty directly to request access to the file. Once the file is obtained, please contact Records Online to advise that you have the file in your possession.</p> <p><b><i>Note: This file may have both physical and electronic documents attached. To view this file's electronic documents, please use Records Online.</i></b></p>