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Container Titles

All records in RAMS are captured to a container. A RAMS container allows us to organise records by the specific process or activity being carried out.

Every RAMS container has a few key components:



Here are some examples of RAMS Container Record Titles showing the function and activity in capitals, followed by free text to clarify the activity being captured:

- COMMUNITY- EVENTS- School of Dark Arts – Graduation Ceremony 2019
- PROPERTY- INSTALLATION- Whomping Willow – Collision Avoidance Lights – June 2020
- STRATEGIC- PLANNING- Hogwart’s Transport Infrastructure Review – Project 9.5
- STUDENT ADMINISTRATION APPLICATIONS- Muggle Access Scheme – A to G– S1 2019



Titling Guidelines

The University has an approved Guideline for titling. You can access it [here, opens in a new window](#)

It is recommended to title records consistently across media to allow for consistent identification, capture and retrieval of information.

The following general guidelines are recommended:

-



Saving Documents and Emails

After using one of the three methods to move the new record into RAMS, the **New Document form** will appear. This is where you will give the new record a title and select the folder it will be saved within.

Fields marked with **FFB Doc** are required.



Addressee

This is the person, people, or organisation who are the recipients of the document.

Use the magnifying glass () to search the RAMS directory for them.

- **Date Created**

Enter the date the document was written. This field will auto populate with today's date, but you can back date this field by

clicking in the date field. 009T38 (37010)T42(1)02W036 (000387021)BAC /TT1 1licg5 Tc0 Tw 3. Tw g



Working With Documents

1. Select the document >
Right click > Edit.

OR

Select the document
and click **Edit** from the
Home ribbon.

To view all the documents CheckedOut

2. The document will open in the authoring application (e.g. MS Word) and will be checked out to you. Make your changes to the document.
3. Select **Save** on the Office Ribbon (not Save As) and close the application. The record will check itself back in to RAMS after saving.

The editing status of the document
is available on the **Properties** tab of
the **View Pane**.

This will tell you if the document is:

Available for editing.

Someone else is working on it.

No longer editable. Readonly



Working With Documents

To view a record, select the record > View from the Home ribbon; or **double click** on the record.

This will open in the authoring application in a ReadOnly mode.

Revisions are a



Working With Documents



Favourites and User Labels

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You may wish to add documents you use or reference regularly to your **Favourite Records** for easy and quick access.

1. Select the relevant folder or document, right-click and select **Send To > Favourites**.
2. The record will be added to your **Favourite Records** (on the Favourites Shortcuts pane).

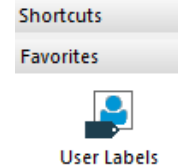
L In RAMS the term **label** MS

L You can also use the F4 button on your keyboard to add to favourites.

To remove an item from your Favourites:

1. Select the relevant document.
2. Right-click and select **Remove From > Remove from Favourites**.
3. The item will be removed from your Favourites list.

1. Navigate to **Favourites > User Labels**.



2. Double click on the User Label to view the records attached to it.

1. Search for the records and folders you would like to add to the user label.
2. Select the record/s
3. Right click > Select **Send To > Add to User Label**



4. Select the label to assign the record/s to > Click **OK**

1. Go to **Favourites > User Labels** and locate the record/s.
2. Right click > Select **Remove From > Remove from User Label**
3. Select the label to remove the record/s from > Click **OK**.



CreatingFolders



Use the **Quick Search Bar** for single criteria searches.

Setting	Definition
Search For	Set to Records to search for folders,



Before reviewing the search results, it is helpful to check how many records have been retrieved. From the **Search ribbon** select **Count**.

If your search returns too many results, you may want to refine the search to add extra criteria or filters to narrow the number of results.

To refine a Search, click the **Refine Search** button on the **Search ribbon**. The advanced search window will reopen to display your current search.

Click the relevant line of your search if you would like to modify it, add additional search criteria, or add search filters.

Select **Refresh Search** to reload the search results of the current window.

Search results can be filtered to show a specific record type or file format.

This can be done when creating a new advanced search or when refining a current search.

Filtering by File Format

Click the **Filter** tab >
Untick **Use default filters**.

In the **File Types** field enter the file extension/s. For example `.doc; .docx`;



Search Method	Description
Title Word	Searches record titles for any matching results.
Any Word	Searches in the title and notes fields for matching results.
Document Content	Searches for matching text within the content of a document.
Notes Word	Searches for matching text in the notes field only.
Record Number	Searches the unique number assigned to a record.
Container	Search for documents within a specific folder.
Date Registered	The date the record was saved to RAMS.
Date Created	The date the document was written.
Creator	A search based on the person who registered the record to RAMS.

To access a complete list of Search Methods, click the **blue magnifying glass** icon at the end of the **Search By** field.

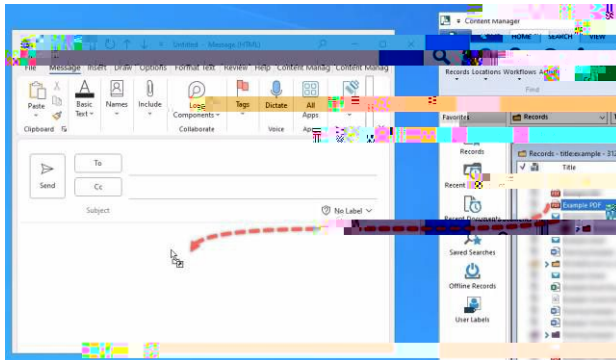
When the list displays, select **Alphabetical**, then sort by **Caption** by clicking the **Caption** column header. This makes the list much easier to understand.

- An **asterisk (*)** wildcard can be used to replace multiple unknown characters. For example, **Build*** would return words such as **Building, Builder, Builders, Builds, Build**.

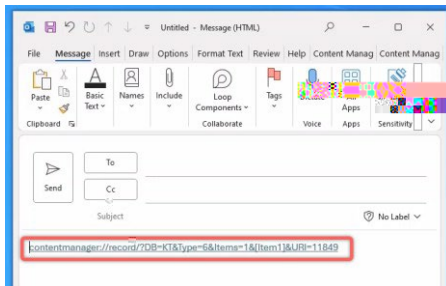


From a New Email

1. Locate the record in RAMS.
2. With the new email open, left click on the record. Keeping the left click button held down drag and drop the record into the email.

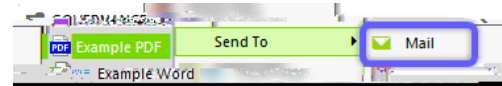


3. A hyperlink to the RAMS record will be embedded in the email.

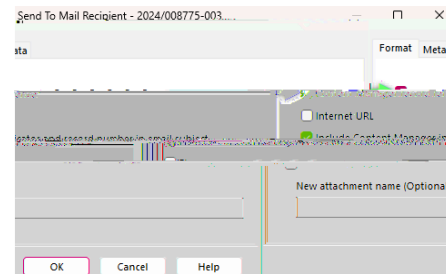


From RAMS

1. Locate the record/s in RAMS.
2. Right click > Send To > Mail



3. Tick Content Manager record reference > Select OK



4. A .tr5 link will be attached to a new email.

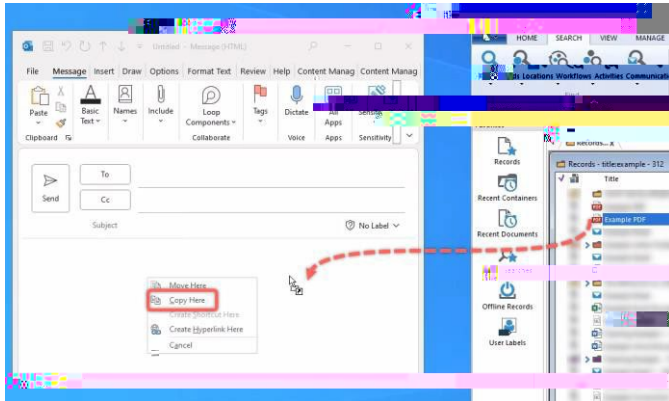


L You can select multiple records (both folders and documents) when using this method.



From a New Email

1. Locate the record in RAMS.
2. With the new email open, **right click** on the record. Keeping the right click button held down **drag and drop** the record into the email.
3. Select **Copy Here**.

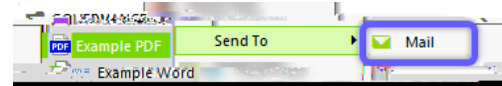


4. An electronic copy of the record will be attached to the email.

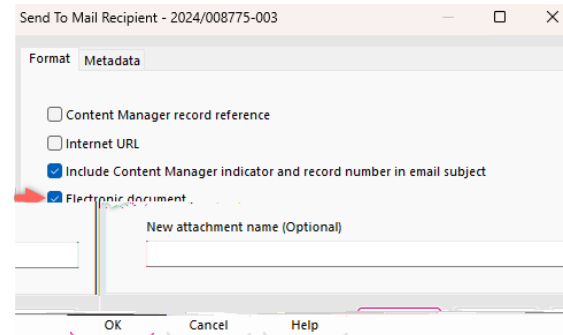


From RAMS

1. Locate the record/s in RAMS.
2. **Right click > Send To > Mail**



3. **Tick Electronic document > Select OK**



L If you are sending the record to both [intare@0.003 n3j8ure8.04 460d59 0.00T](#)



Outlook Features

1. From the Content Manager ribbon selected **Check In Styles**.
2. Click the **blue plus icon**.
3. Give the Check In Style a **Name** (e.g. Payroll Emails or Project XYZ).
4. Select the **Record Type** for your Check In style (this is mandatory).
5. If required, fill in the relevant properties for your new Check In Style (**Container, Alternative Container, Addressee**).
6. If required, fill in the **Set Default Author Option** (using the drop-down shortcuts OR enter a **Specific Author**).
7. Configure the following boxes for each new style as you require. You can have all, some or none of these ticked.

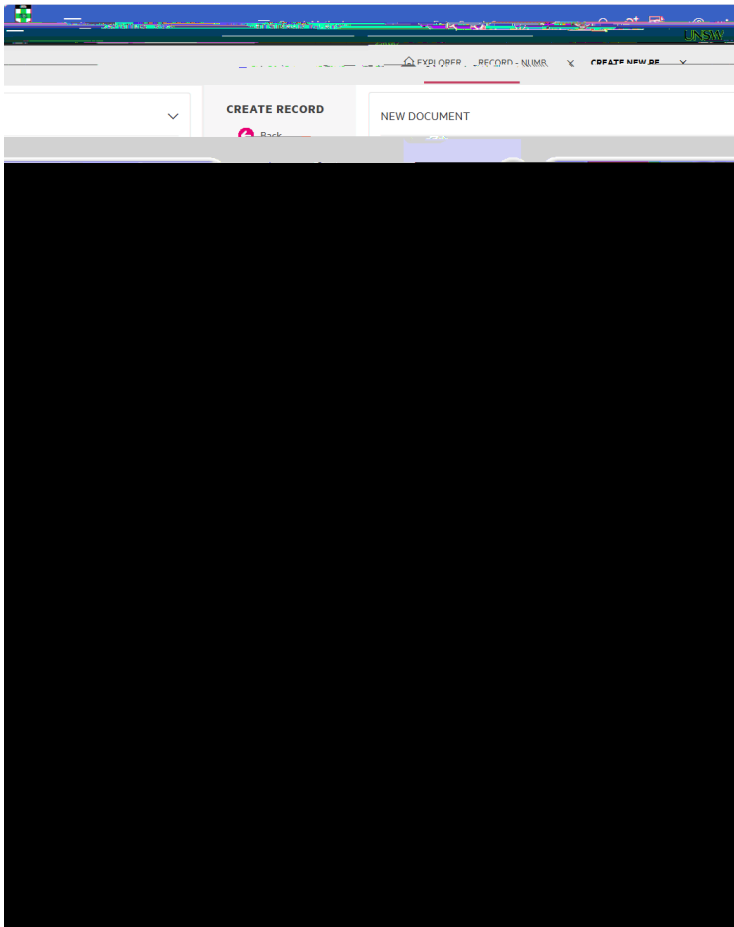
The check in dialog box is the new record form where you normally enter the record Title and File Number. If you do not check this tick box, the record title will be set to the text in subject line (not recommended to untick).

Tick this box if you would like the email to be moved to the Deleted



Web client is the web-based interface for RAMS. If you cannot connect to the UNSW network to access the desktop client or you use a MAC PC, you can use web client for access to RAMS.

- 1.



- 1. Title**

Enter the title of your record using the UNSW standard naming and titling convention.
- 2. Container**

This field will prefill with the folder number based on the folder you dropped it on top of.
If you have selected the wrong folder, click on the folder () at the end of the field to search for the correct folder.
- 3. Date Created**

Enter the date the document was written.
This field will auto populate with today's date, but you can change the date by



To search for records on the web client, use the search bar in the top right corner of the window.

Search Setting	Setting