



Records Online News

Issue no.2

Upgrade to Records Online and TRIM

Hold the phone! Stop the press! RMS are upgrading Records Online and TRIM to TRIM 6.2. This is a better program, much faster and allows more functions for the user.

Users of ROL won't see much difference, as the look and feel will remain. The noticeable difference will be the speed of searches, as the new servers will make a vast improvement on the existing system.

TRIM users will notice immediately the change in look, as TRIM 6.2 is much more visually attractive. However, the program is the same and no functionality has been removed. However, workflows will be available, allowing a set of users to have tasks issued to them automatically upon the completion of other tasks in the group.

The upgrade is due to be completed on the weekend starting Saturday 17th January. Further communication will be sent out to all users at a date in the not-too-distant future.

Tips and tricks for using the email add-in

Users forget how easy the email add-in is for ensuring that all necessary email correspondence is kept according to the state law and University policy. For those who don't know, the add-in allows you to save emails to a file electronically. Click on the link to see some hints for using the add-in.

A few tips to make it even easier to use:

1. Any inbox folder you are using regularly, even for a short period of time, map it to the file on ROL and click and drag to save the emails quickly.
2. Get the file number from ROL before saving the email, as a record number search only brings back one search result.
3. Save the emails only when a business decision is reached, rather than saving every exchange.
4. Don't forget to save emails you have sent. You might not get a response from the receiver, but you need to save the email as a record of you sending it.

If you have any questions about how to use the add-in, please ask the RMS helpdesk (x69537) or training officer (x13395).

Location of files

Users sometimes request files which RMS don't have. Under the heading *Assignee* on ROL, it lists the file's location. If a file is with RMS, it will say [*Records Management Services Compactus A14*] or [*RMS Telfer Building Secondary Storage*]. If either of these is the assignee, you can request the file by using the link under the heading *Request*. If a file's assignee says it is located at a warehouse, it is also with RMS and can be requested the normal way (eg. [*Warehouse 1, area 2, bay 2, row 4, shelf 3*]).

If a file's assignee is [*Electronic*], there are no paper records and there is no need to request the file unless you wish to have an empty paper file sent out to you so you can add paper documents to it.

If a file's assignee is any other person or location, click on the name of the person or location and their contact details will appear. You must contact that person to request the file, then ensure that it has been noted on ROL (ask the helpdesk if there are any questions about this). Please do not contact RMS if a file is not in one of our storage areas.

Retention of Special Consideration documentation

Special consideration documentation is an important University record. It should be kept on a registered file on ROL. If this is done, there is no need to worry about how long to keep the documents, as all files are kept in ROL for as long as they are legally required or useful to University staff.

However, some faculties keep this documentation locally. This is not a problem, but it must be noted that the required period of time to keep this documentation is three years, according to the State Records Act 1998's General Disposal Authority. University policy only mandates one year, but this is yet to be updated.

These documents must also be kept securely and it is an offence under the Act to destroy these documents before the legally required time. Please inform the relevant person in your faculty in case they do not realise this.