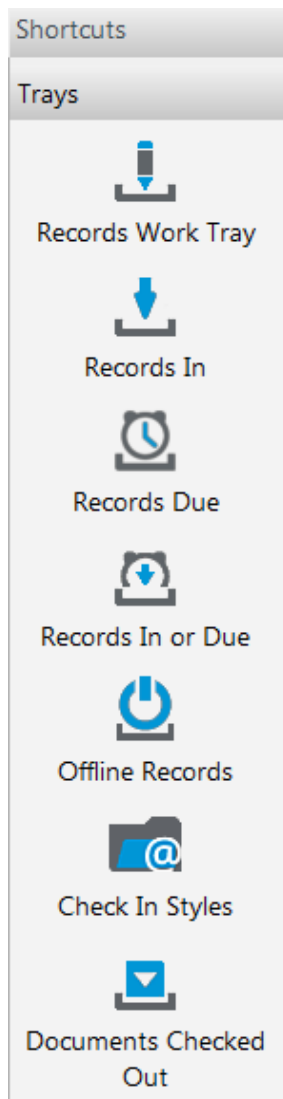


Understanding Trays

Introduction

In the Shortcuts pane you'll find a series of Trays you can use to manage the work you're currently doing or need to do with records. Some of the Trays are related to Action Tracking.

Trays explained



Records Work Tray: Use this tray to keep a list of records you need to work on. To add records to this tray, select the records and use the F3 shortcut key.

Records In: The University still deals with lots of hard-copy files; these are managed in Content Manager too. If you've got a hard-copy file marked as being in your possession, it'll be listed here.

Records Due: Content Manager includes action tracking features that allow actions or procedures to be attached to a record, then assigned to a user to complete. If someone assigns you an action, the record you need to work on will appear here. After you do the work, you'll mark the action as complete, and the record will no longer appear in your Due tray.

Records In or Due: Displays all records that are currently in either the Records In or the Records Due trays.

Offline Records: Displays records marked as offline from Content Manager because you have them saved outside the system for editing (often used if you need to work on a record, but aren't connected to Content Manager via the University network). These records appear in your U: drive, where you can edit them in their native application (e.g. like Word), then Check In later. But, you can access the full Content Manager application via ADAPT and VPN, so checking records out to Offline is rarely necessary.

Check in Styles: You can create Check In Styles for different types of records or for registering documents to a specific file. Your Styles will be listed here, and you can also use this Tray to create new Check In Styles.

Documents Checked Out: When you manually check out a document (to prevent others editing it) or open an electronic document for editing (which automatically checks it out to you), that document will appear in this Tray. It's really important not to accidentally leave documents checked out, as it means others can't edit them. Particularly important to clear this before you go on leave!

Note: Although you'll also see the icons in the Trays list, **To Do Items**, **Scheduled Tasks Tray**, and **User Labels** are not used in the University of Adelaide's Content Manager configuration.

Contact Us

For further support or questions, please contact Records Services on **8313 5334** or records.services@adelaide.edu.au