

HEWLETT PACKARD ENTERPRISE RECORDS MANAGER (HPE RM) END USER MANUAL

EXECUTIVE SPONSOR – MELISSA SALAZAR

BUSINESS OWNER - LEO LUCERO

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Version History

REVISION NUMBER	DATE	COMMENT
1.0	July 27, 2016	Initial version and deliverable
1.1	November 14, 2016	Removed inaccurate Knowledge Worker icon.
1.2	December 19, 2016	Updated screenshots. Removed Power User functions. Reorganized content.
2.0	January 17, 2017	Updated based on CPR comments.
2.1	January 24, 2017	Updated based on CPR comments.

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1. PURPOSE

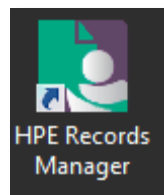
This user guidance is designed to assist users in performing basic functions within the HPE RM system.

*Note: Unless otherwise indicated, this guidance is based on users with a defined User Type of **Knowledge Worker**.*

Your system administrator will let you know what user type you are.

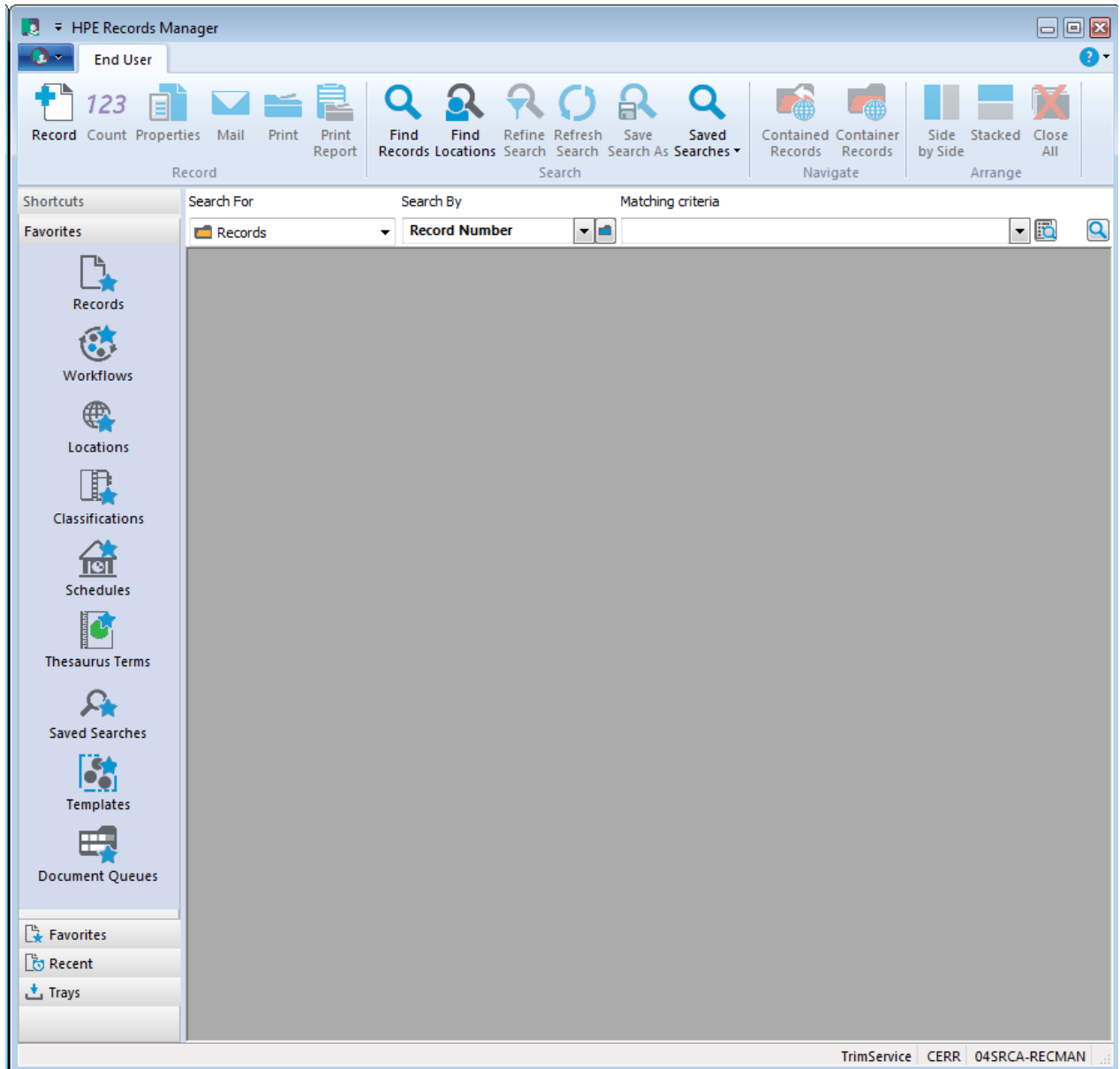
2. TO LAUNCH HPE RM

To launch HPE RM double click on the HPE RM icon on your desktop. If you do not see this icon on your desktop, please contact your system administrator.



3. HPE RM INTERFACE - DEFAULT SCREEN LAYOUT

This is the initial view that will be displayed upon opening HPE RM. Specific elements of the interface will be described below.

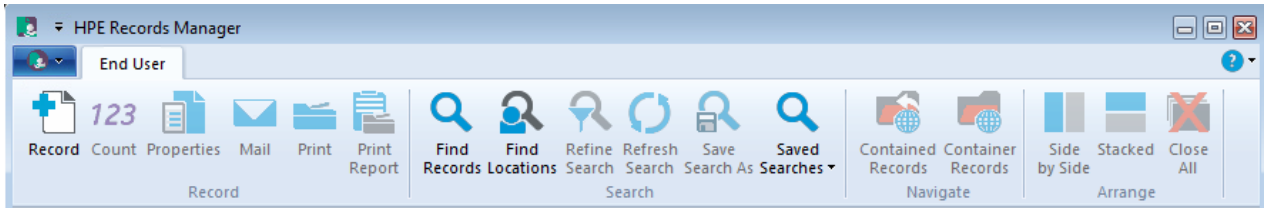


Note: If you do not see the End User tab on your launch screen, go to Section 4 to load the global settings.

TABS

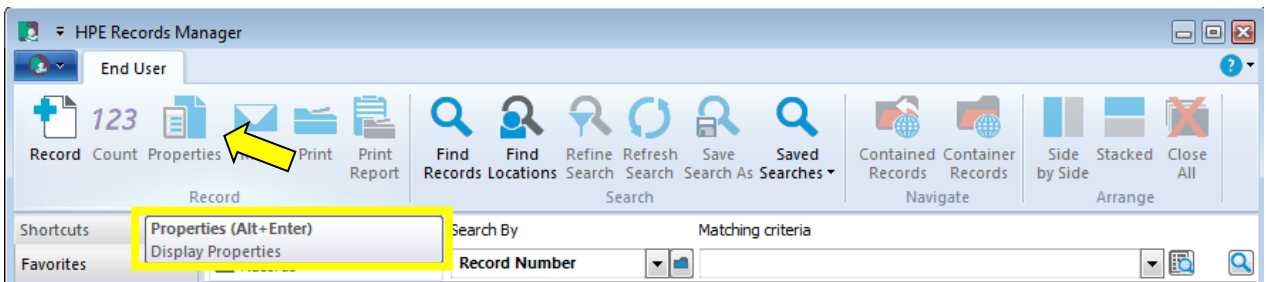
There is a single tab displayed at the top of the screen upon opening the application.

End User



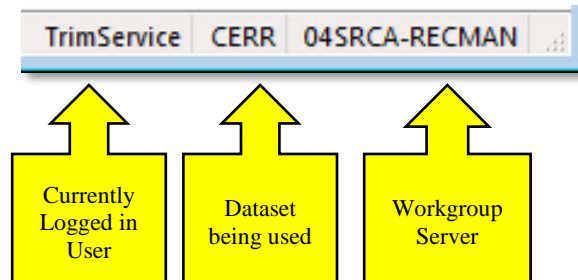
Positioning the cursor over an item in a tab will display additional information about the associated function. Some functions may not be available (appearing grayed-out) if there is nothing to apply the function to (i.e., if a record or search results are not displayed).

For example, the Properties function is not available if there is not a record being displayed.



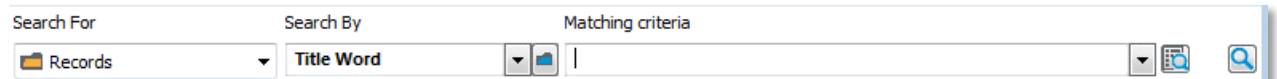
STATUS BAR


The status bar, located at the bottom right corner of the HPE RM screen displays information about the user and system configuration.



QUICK SEARCH

The Quick Search function provides the ability to perform fast searches using a single criteria.

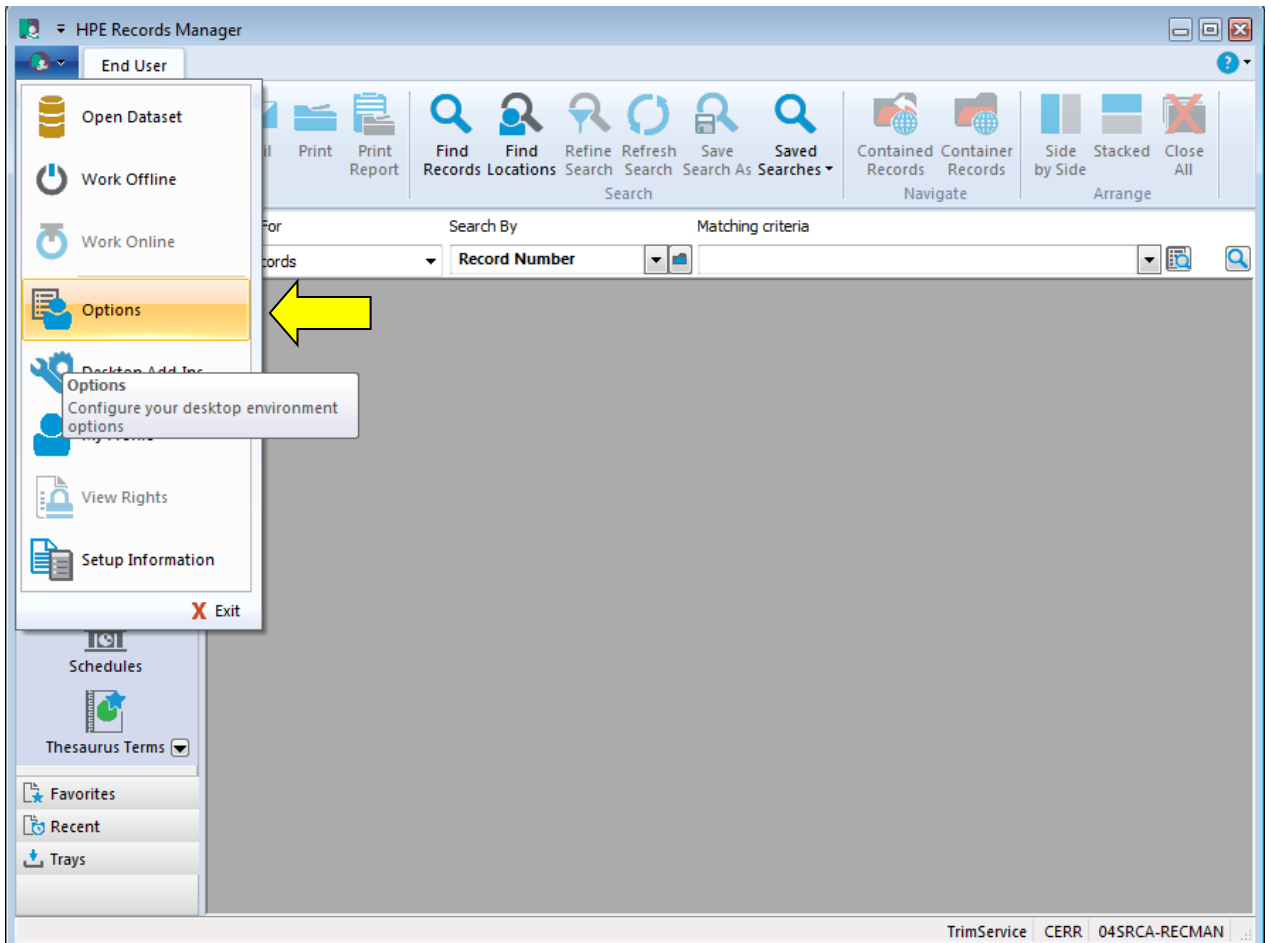


- **Search For** - Select the object to search for.
- **Search By** - Use the KwikSelect  button to select a search method.
- **Matching criteria** - Enter the data to find.
- **Search Options** – Modify search functions.
- **Run Search** button - Click to execute the search.

4. CUSTOMIZING HPE RM OPTIONS

There are options that can be accessed and modified to change elements of the application behavior.

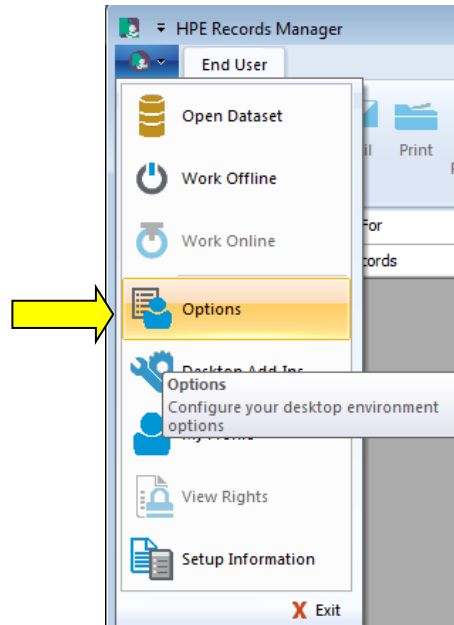
To access the Options click the **File** button and select **Options**.



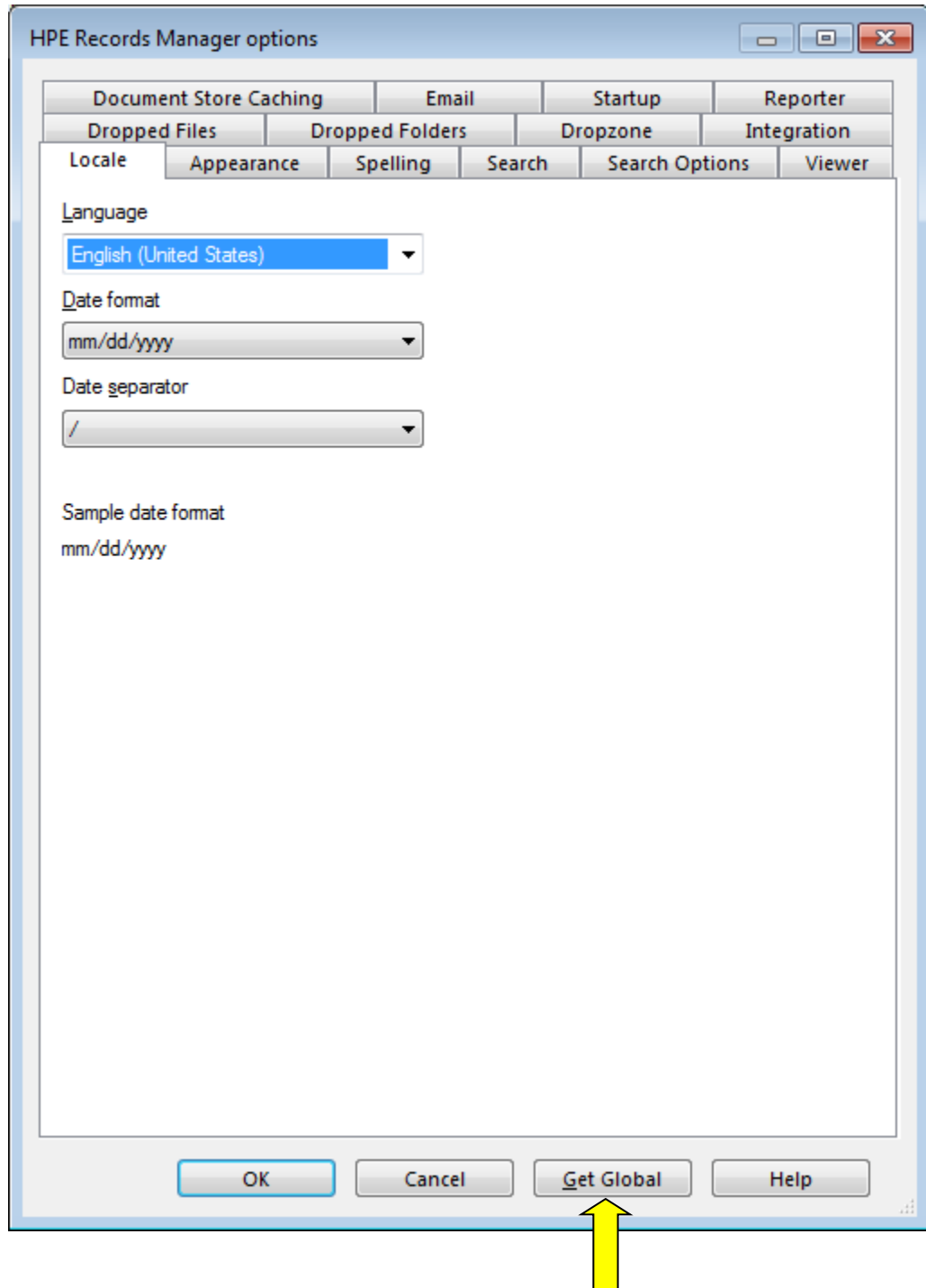
GET GLOBAL

Get Global enables users to retrieve the global settings that the administrator or user with the correct **Change System Settings** permission has established.

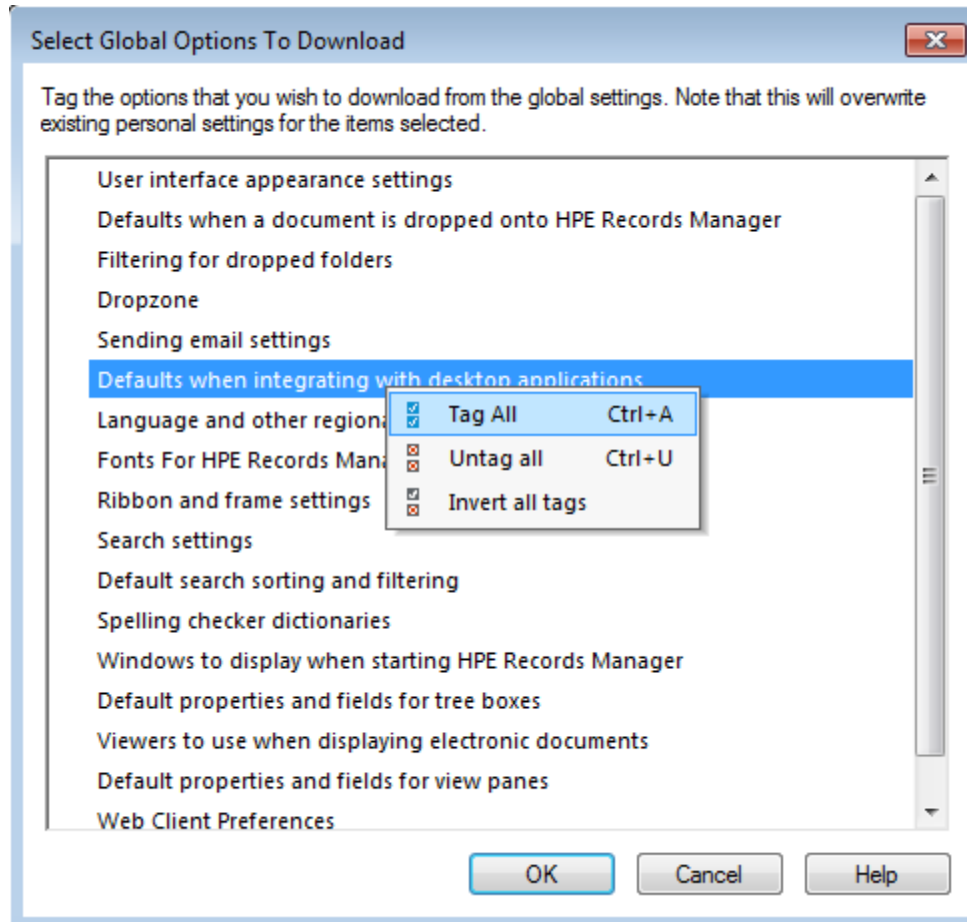
1. Click on the file menu to the left of the Home tab, and then select Options.



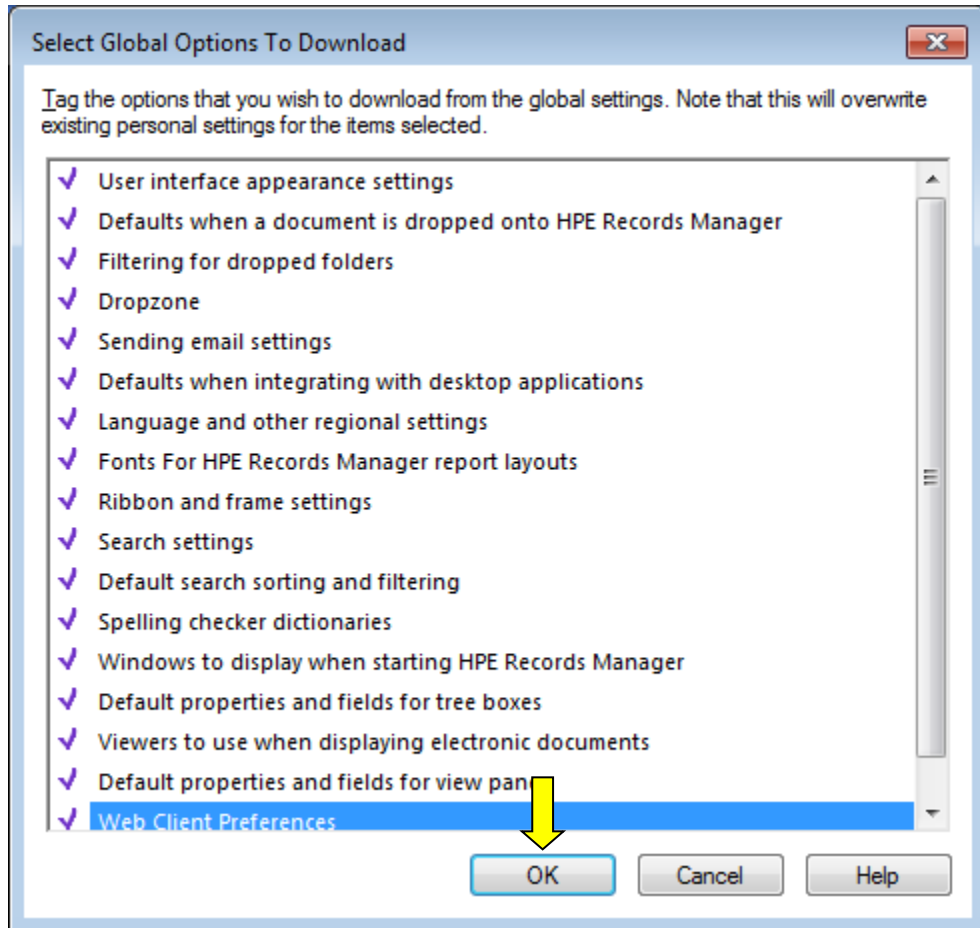
2. Click the Get Global button.



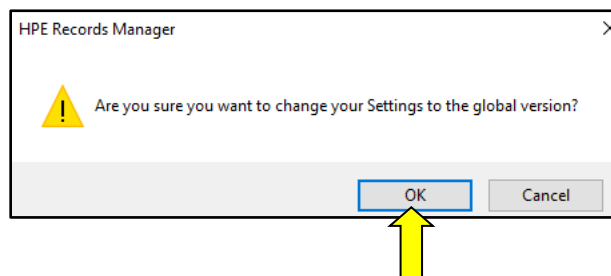
3. When Select **Global Options to Download** window appears, **right-click** in the box, select **Tag All**.



4. Confirm your selection by clicking OK.



- A dialog box appears asking “are you sure you want to change your Settings to the global version?” Click **OK**.



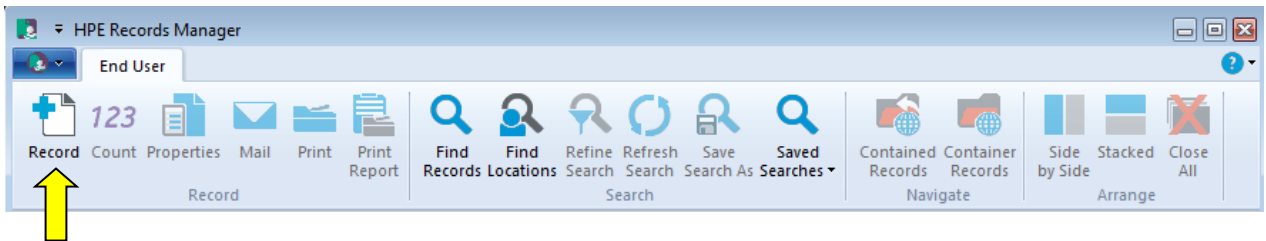
5. ADDING RECORDS

There are several different ways to add records to HPE RM depending on the type of information being added and the method preferred by the user.

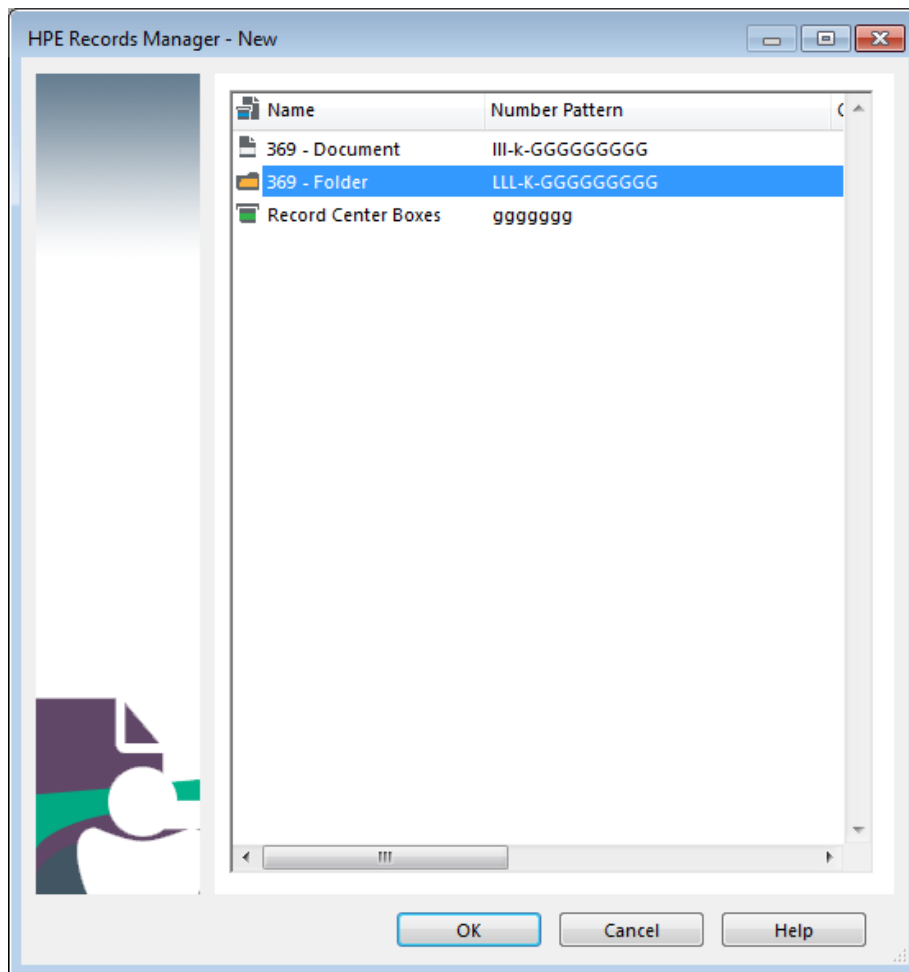
CREATING FOLDERS

Folders will be used to contain all documents added to the system.

1. From the End User tab click the **Record** button



2. The list of available record types will be displayed. Select **Folder** and click **OK**.



3. The data entry form for the folder will be displayed.


New 369 - Folder

Title (Free Text Part)
* General Correspondence 2015

Classification
* 1.21.2.105

Current Location
* <At home> TrimService

OK Cancel Help

- **Title** – Enter a Title describing the contents to be placed in the folder.
- **Classification** – Select a Classification appropriate for the folder contents.
 - Click the KwikSelect  button.
 - The Classification window will be displayed. Click the “Plus” button next to the **FRRDS** item.

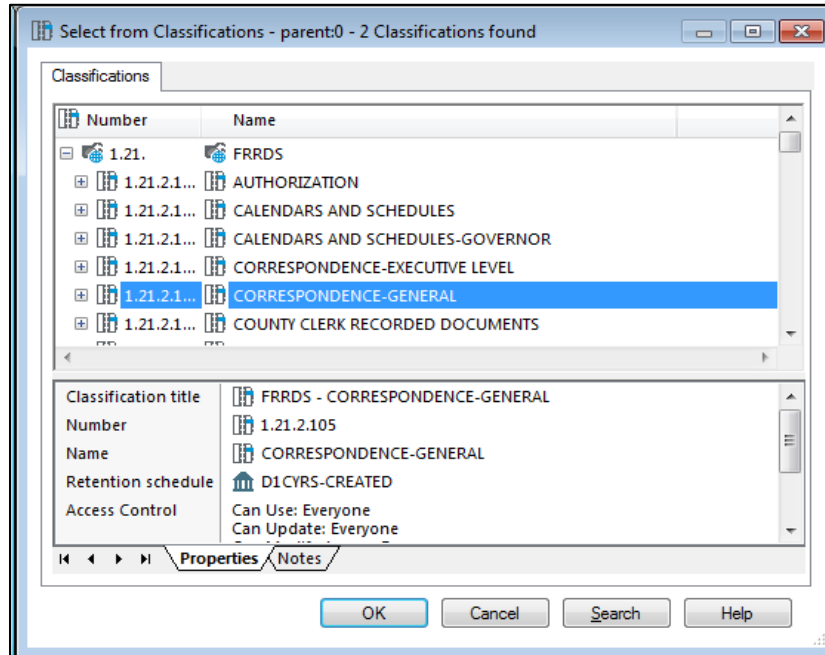
Select from Classifications - parent:0 - 2 Classifications found

Number	Name
1.21.	FRRDS
EXCEP	Classification used for Exceptions

Classification title: FRRDS
Number: 1.21.
Name: FRRDS
Retention schedule:
Access Control: Can Use: Everyone

OK Cancel Search Help

- The list of available Classifications will be displayed.



- Select the appropriate entry and click **OK**.
If you are uncertain about which classification to use, please contact an agency analysis bureau analyst.
- **Current Location** – Defaults to the currently logged in user.

ENABLING MICROSOFT OUTLOOK INTEGRATION

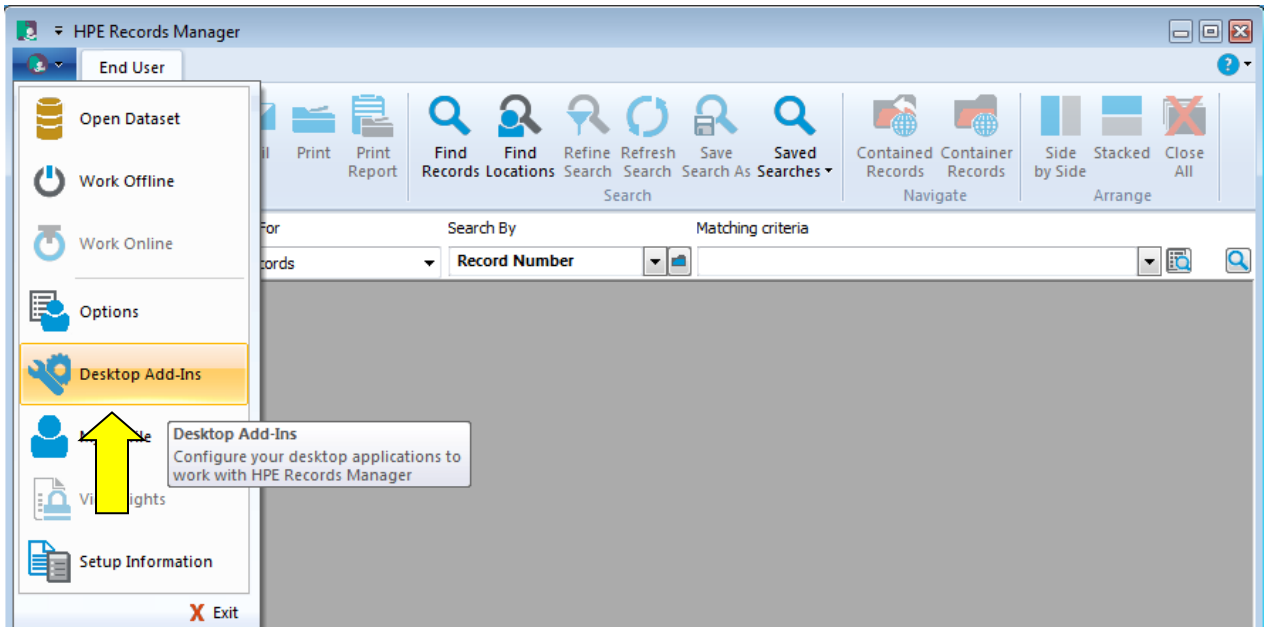
The management of emails can be accomplished via the integration between Microsoft Outlook and HPE RM.

You can check in the following email types:

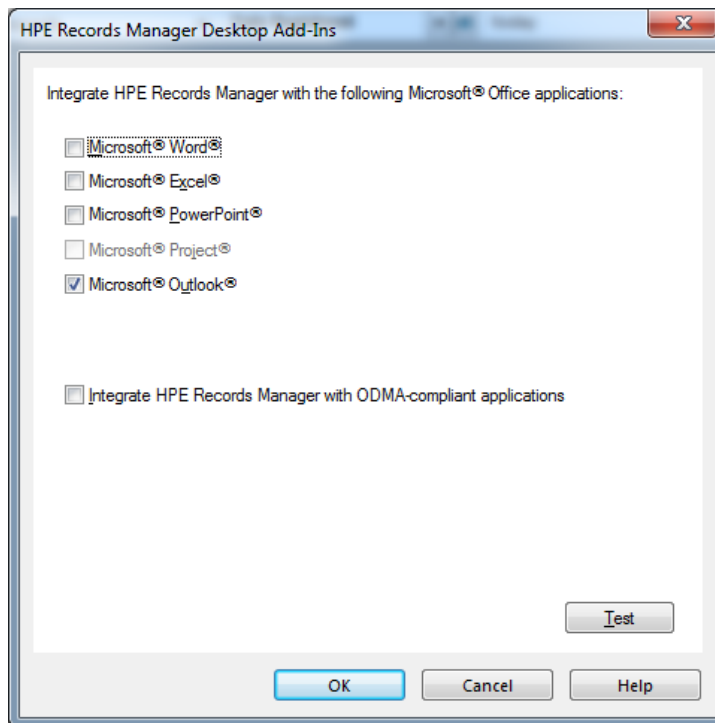
- Standard email messages
- Email messages with attachments
- Meeting requests from the Sent Items folder
- Accepted, declined and tentative meeting requests
- Accepted and declined tasks after they have been opened and then closed. Sent tasks cannot be checked in.

E-Mails can be manually cataloged within HPE RM using the Outlook integration toolbar.

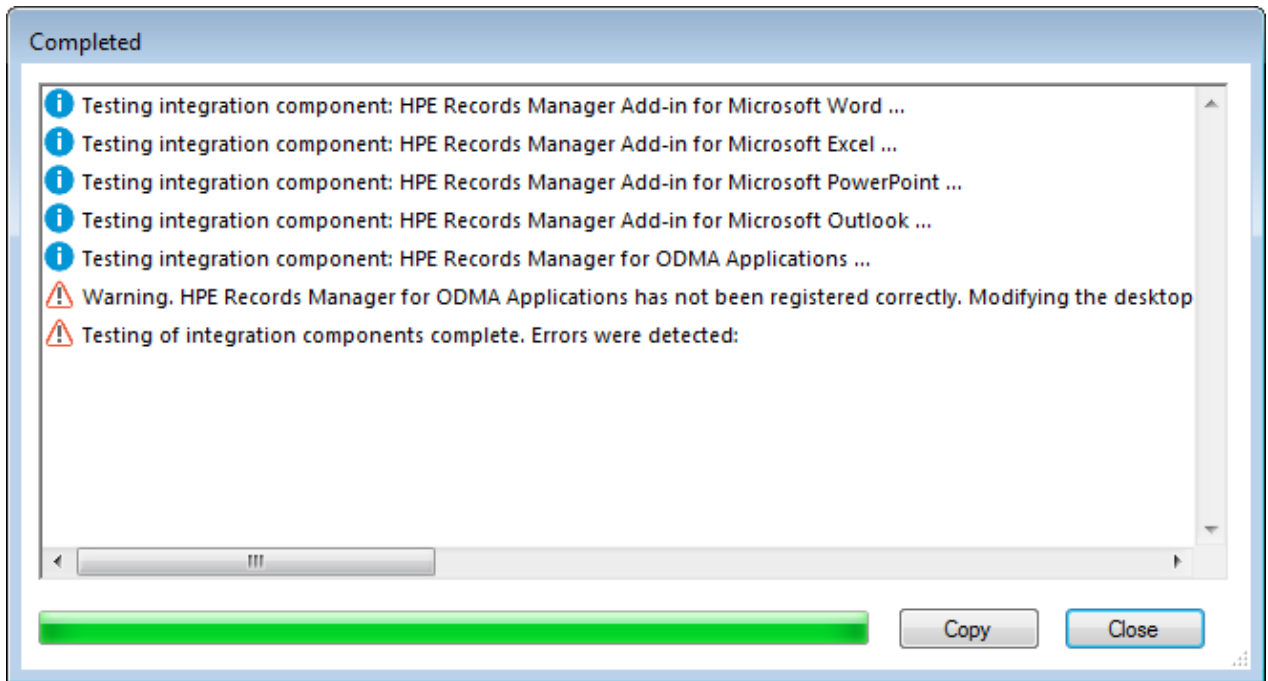
1. Click **File** button and select **Desktop Add-Ins**.



2. The Desktop Add-Ins dialog will be displayed. Select **Microsoft Outlook** and Click **OK**.



3. Click the **Test** button to test the integration. When some components have not been registered correctly, HPE RM prompts you to register them.



Note: HPE RM will use the same integration options for every dataset you connect to.

ODMA errors can be safely ignored as that function is not part of the CERR environment.

USING MICROSOFT OUTLOOK INTEGRATION

The management of emails can be accomplished via the integration between Microsoft Outlook and HPE RM.

You can check in the following email types:

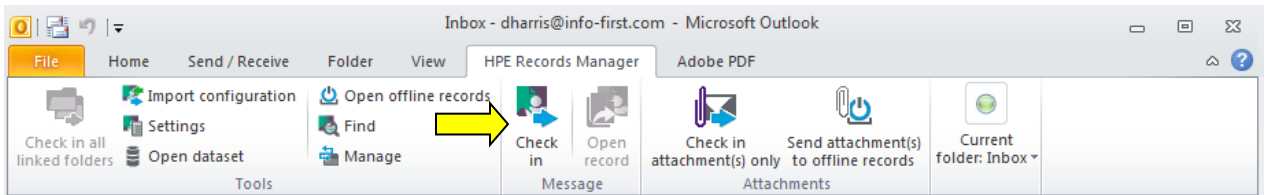
- Standard email messages
- Email messages with attachments
- Meeting requests from the Sent Items folder
- Accepted, declined and tentative meeting requests
- Accepted and declined tasks after they have been opened and then closed. Sent tasks cannot be checked in.

E-Mails can be manually cataloged within HPE RM using the Outlook integration toolbar.

To manually catalog individual emails into the HPE RM repository:

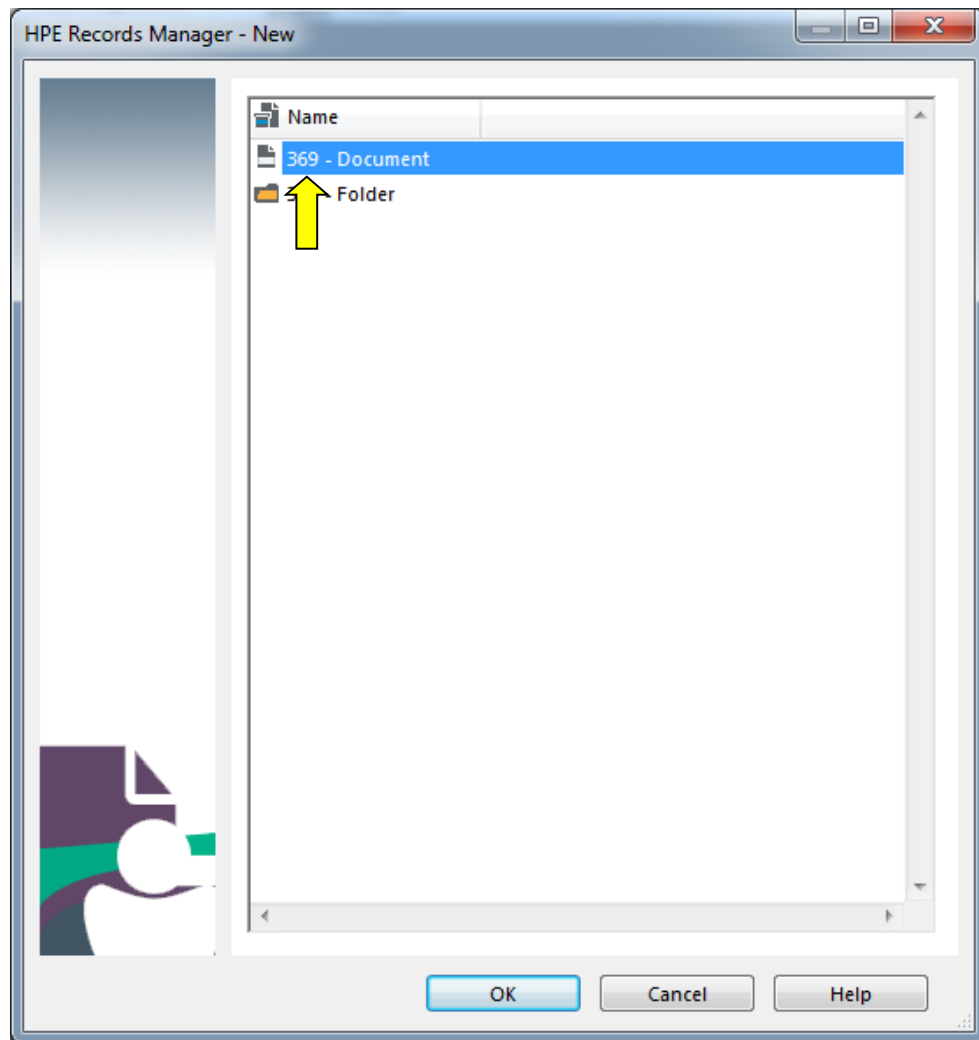
1. Highlight the desired email.

2. Click the Check In icon on the HPE RM tab within Outlook.

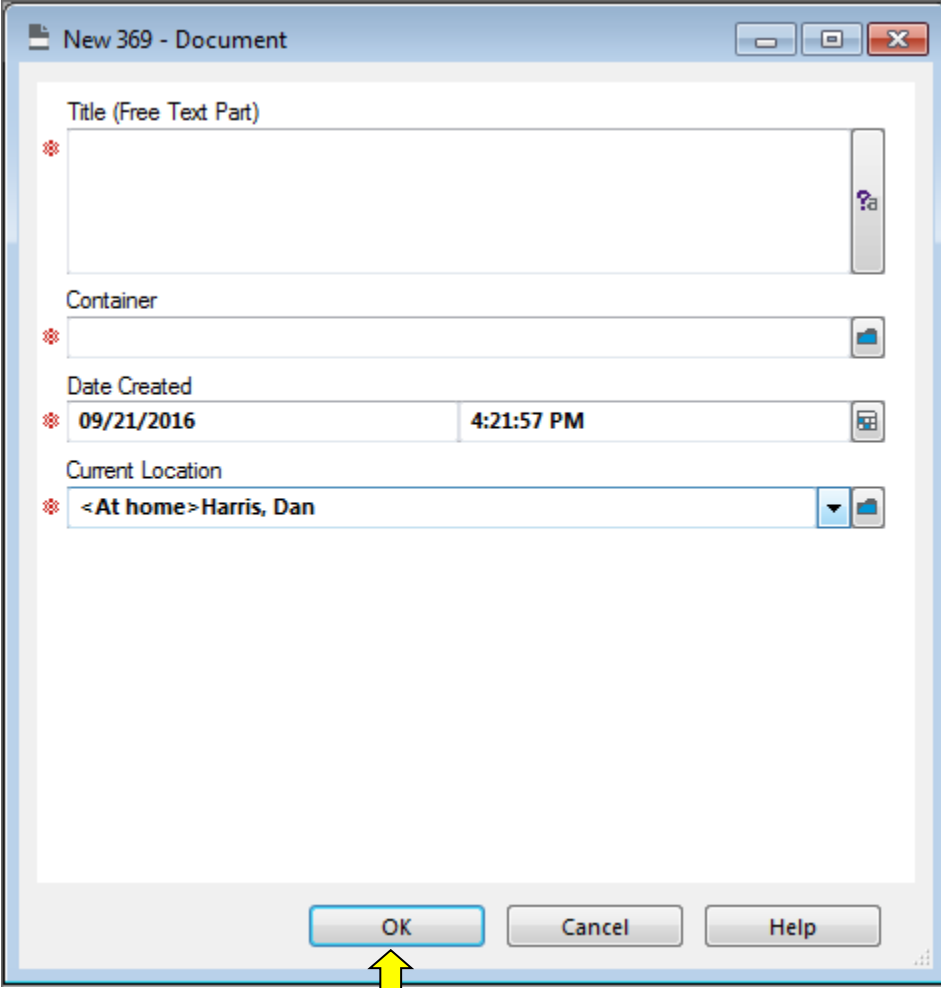


Note - Icons will become available as they are useful for the tasks you are performing.

3. Select the appropriate **Document** record type, and click **OK**.



4. Update the Record Entry form with an appropriate **Title** and **Container** (Folder).



The screenshot shows a window titled "New 369 - Document" with the following fields:

- Title (Free Text Part)**: An empty text box with a red asterisk icon on the left and a search icon on the right.
- Container**: An empty text box with a red asterisk icon on the left and a folder icon on the right.
- Date Created**: A date and time field showing "09/21/2016" and "4:21:57 PM" with a red asterisk icon on the left and a calendar icon on the right.
- Current Location**: A dropdown menu showing "<At home>Harris, Dan" with a red asterisk icon on the left and a folder icon on the right.

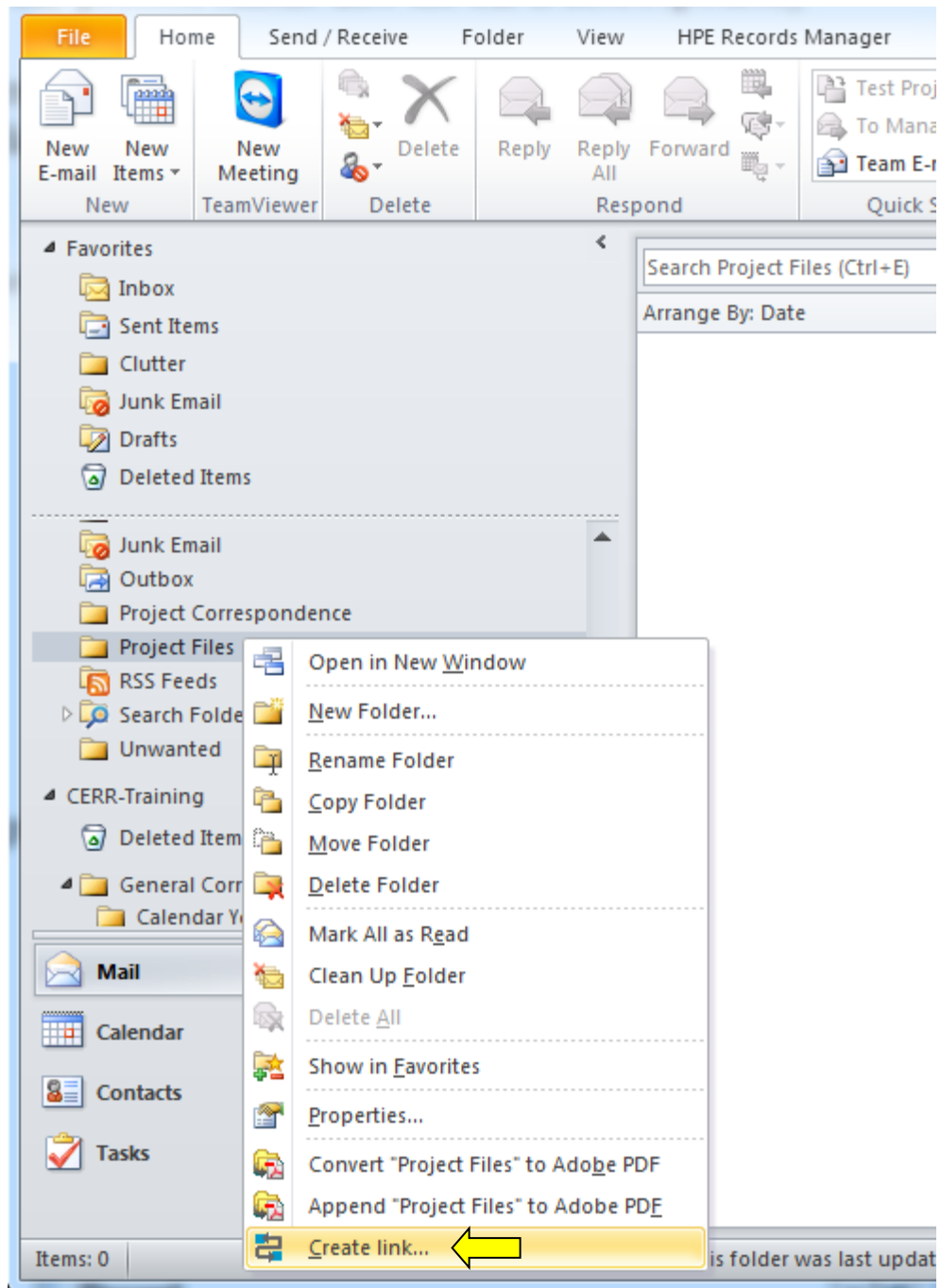
At the bottom of the window are three buttons: "OK", "Cancel", and "Help". A yellow arrow points to the "OK" button.

5. Click **OK** to save.

HPE RM integration with Outlook has an automated email check in function called **Linked Folder**. It enables you to set HPE RM to monitor specific folders and then check-in the items contained in the folder to HPE RM.

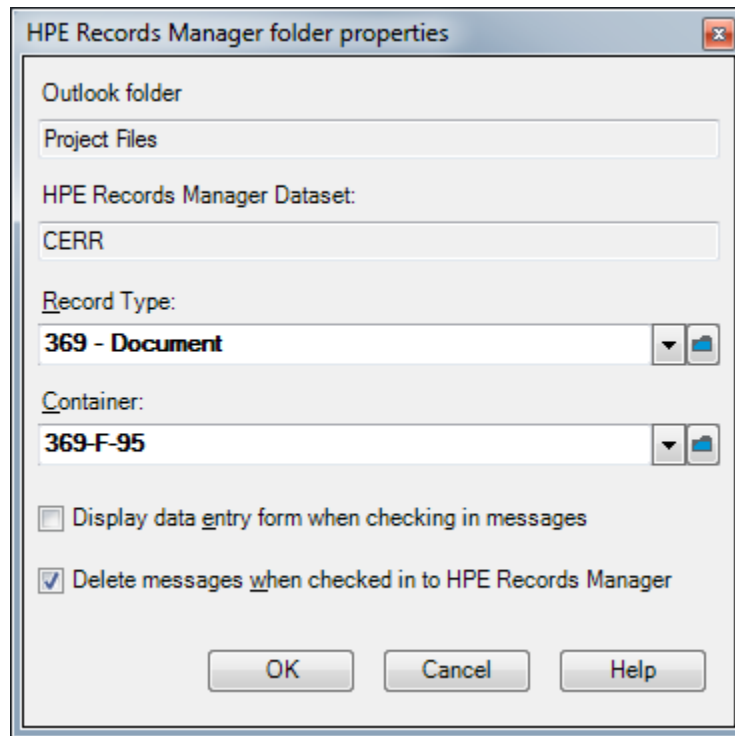
To automatically process emails into the HPE RM repository

1. Select an existing Outlook folder you wish to link to HPE RM.
2. Right-Click the folder and select **Create Link**.



Tip: Do not link your Inbox to HPE RM. If you do, all the email received will be checked in to HPE RM.

3. Fill in the properties for the link.



- **Record Type** (mandatory) – Select the appropriate document Record Type.
- **Container** (mandatory) – The default Container that all email processed from this folder will be checked into.
If you are not sure how to locate the correct folder to link to, please contact the CERR helpdesk at rmd.cpr@state.nm.us.
- **Display data entry form when checking in messages** – Ensure this item is unchecked. This option will process the email without displaying the Record Entry form.
- **Delete messages when checked in to HPE RM** – Ensure this item is checked.

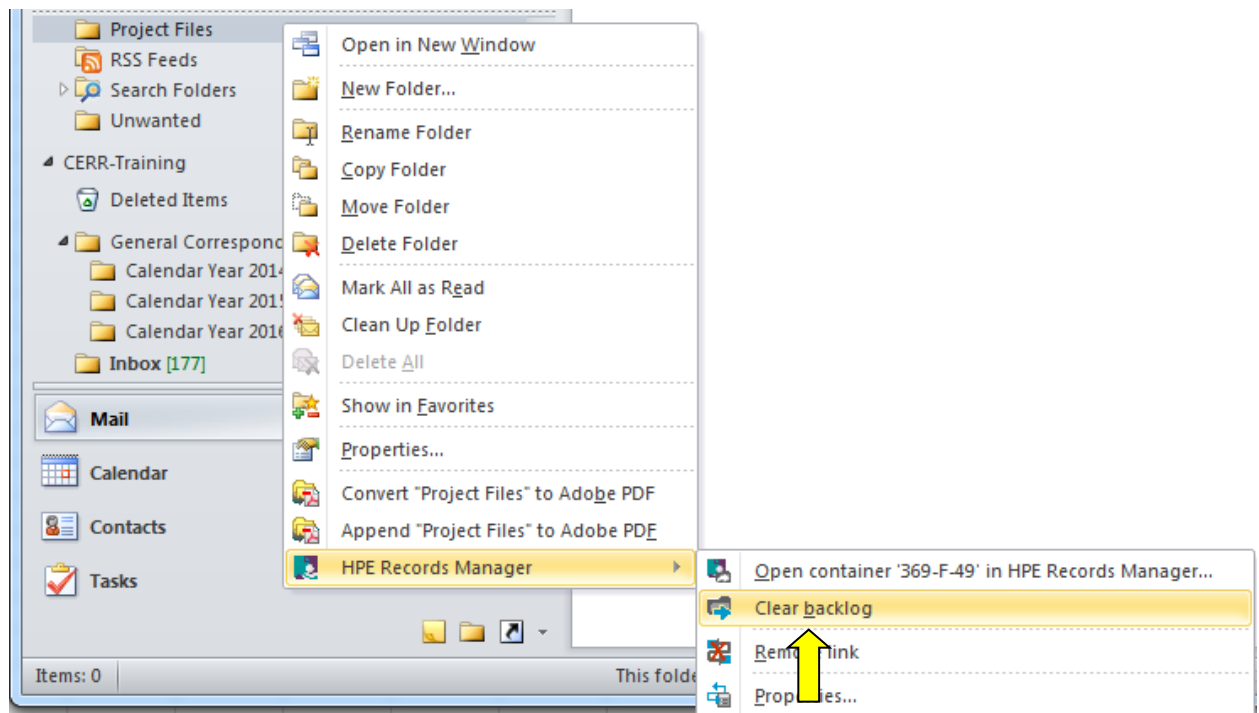
4. Click **OK** to save the changes.

Going forward, HPE RM in Outlook will automatically process mail messages when they are moved to the linked folder.

To catalog existing emails within a linked folder, a Clear Backlog function can be executed.

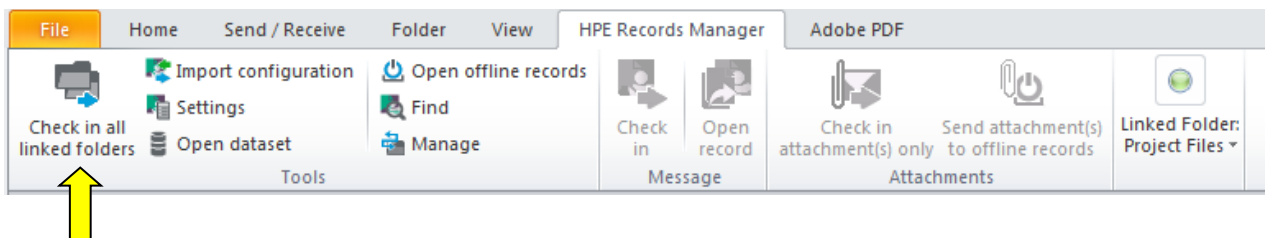
To clear the backlog for a single linked folder:

1. Right-click the desired Outlook folder
2. Select **HPE Records Manager->Clear Backlog.**



To clear the backlog from all linked folders:

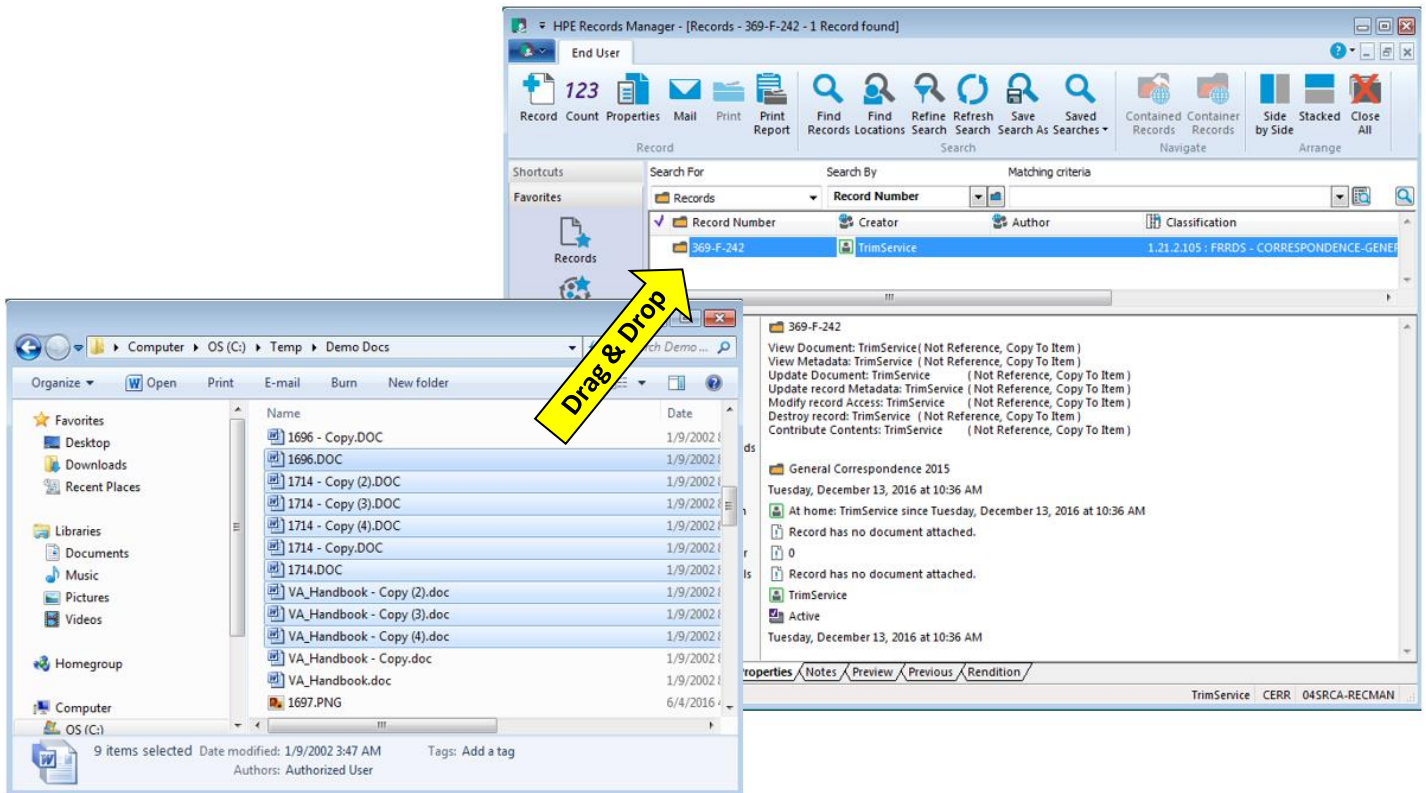
- Open Outlook.
- Click the **HPE Records Manager** tab.
- Click **Check in All Linked Folders.**



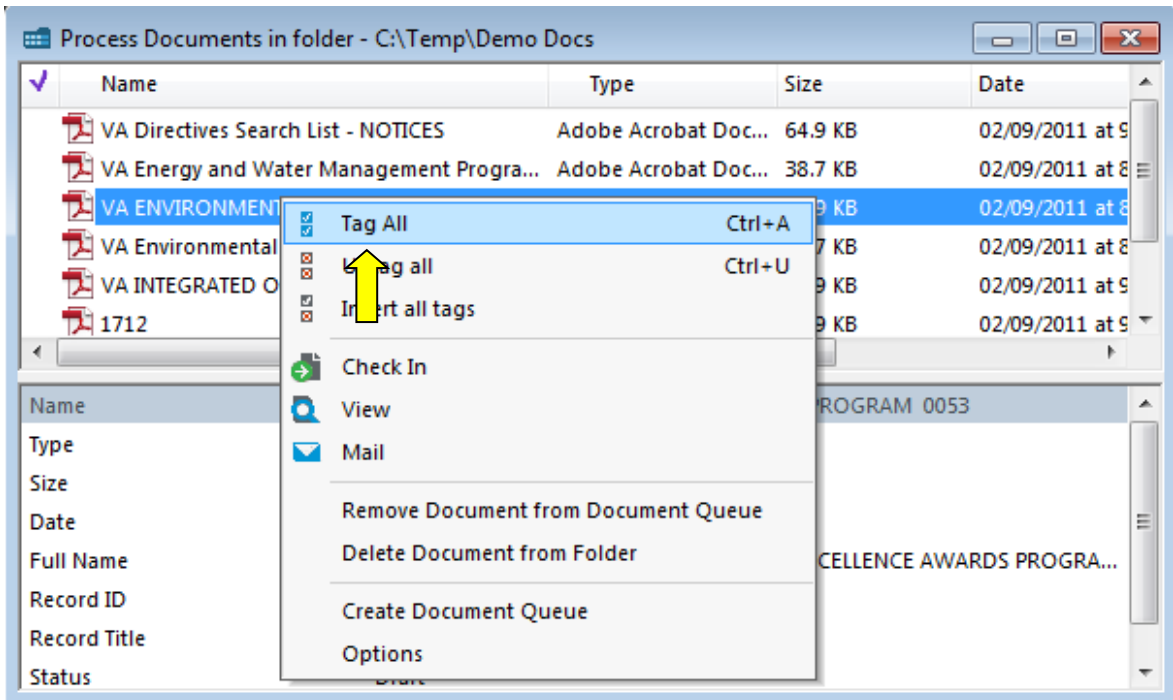
ADDING MULTIPLE DOCUMENTS TO A FOLDER AT ONCE

Adding records to the system with this method presumes that Windows Explorer and HPE RM are both open.

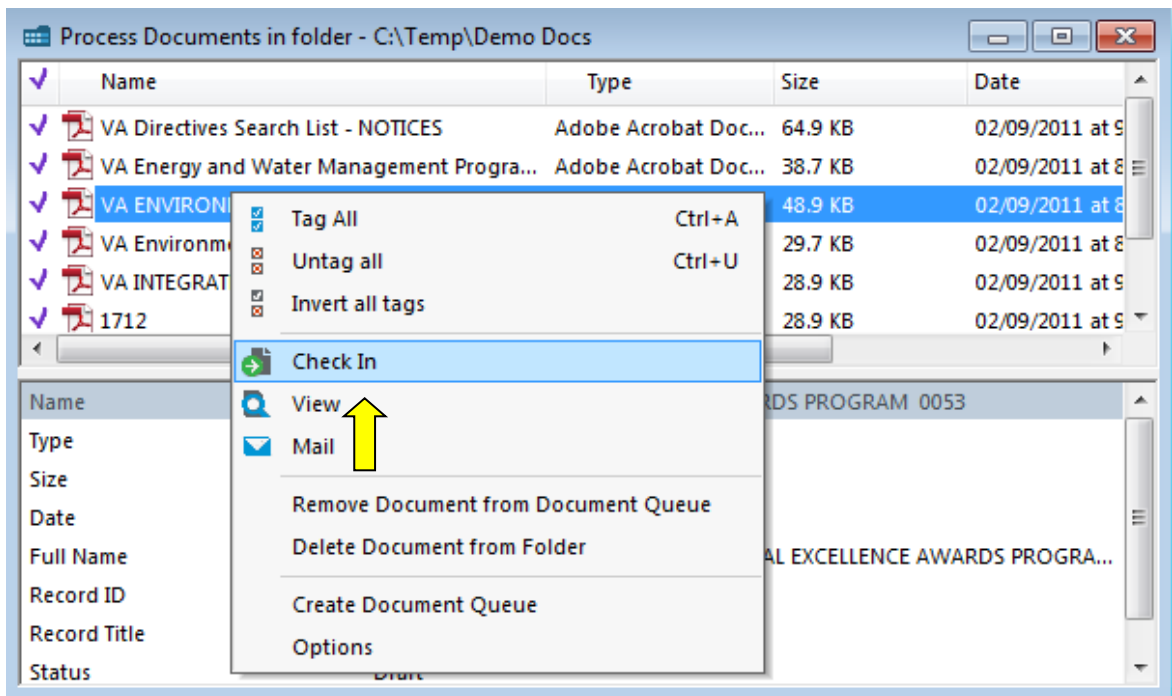
1. From within Windows Explorer highlight the files to add to the system.
2. Drag & drop the files onto the desired folder in the HPE RM window.



3. HPE RM will open and display the selected records in a Process Documents window. Position the cursor over the records, **right-click**, and select **Tag All**.



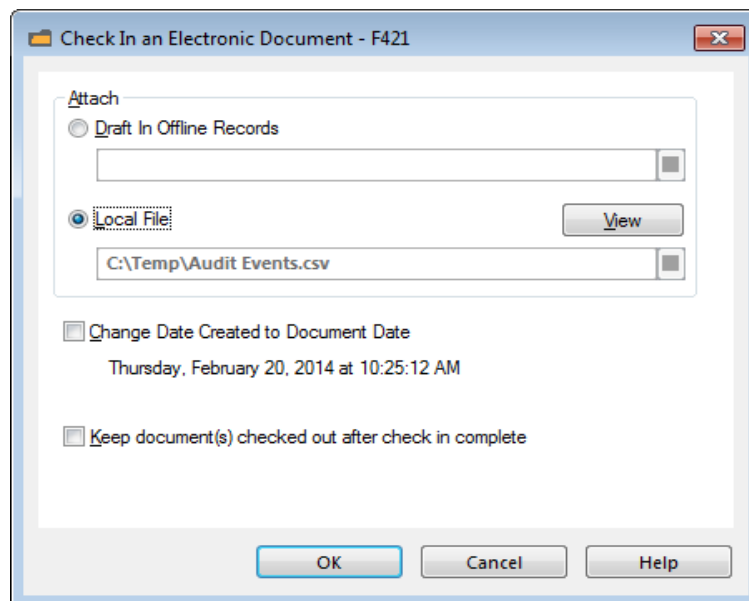
4. Position the cursor over the records, **right-click**, and select **Check In**.



5. Once all the records have been created the **Process Documents** folder can be closed.
You can confirm the success of the records creation by the value in the **Status** field. Prior to checking in the status will reflect **Draft**. After the records have been added to the system it will display **Original**.

ADDING ONE DOCUMENT TO A FOLDER AT A TIME

1. If one document is being catalogued at a time, the box below appears.



2. Select the Local File radial button. Click **OK**. The electronic document will be checked into HPE RM.

HPE Records Manager

HOME SEARCH VIEW MANAGE

Save Copy Record Mail Check In Print Report Layouts
 Save and Clear Delete Scan View Edit Check Out XML Export Statistical
 Properties Reference Read Barcodes Documents Reports

Shortcuts

Favorites

- Records
- Workflows
- Locations
- Classifications
- Schedules
- Thesaurus Terms
- Saved Searches

Recent Trays

Search For: Records Search By: Date Registered Matching criteria: today

Process Documents in folder - C:\Temp\Demo Docs

Name	Type	Size	Date	Status
1710	Adobe Acrobat Doc...	48.9 KB	02/09/2011 at 8:55 AM	Draft
1711	Adobe Acrobat Doc...	29.7 KB	02/09/2011 at 8:58 AM	Draft
VA ENVIRONMENTAL EXCELLENCE AWARD...	Adobe Acrobat Doc...	48.9 KB	02/09/2011 at 8:55 AM	Original
VA Environmental Management Program ...	Adobe Acrobat Doc...	29.7 KB	02/09/2011 at 8:58 AM	Original
1712	Adobe Acrobat Doc...	28.9 KB	02/09/2011 at 9:03 AM	Original
1713	Adobe Acrobat Doc...	266.0 KB	04/20/2011 at 9:06 AM	Original

Name: 1711
 Type: Adobe Acrobat Document
 Size: 29.7 KB
 Date: 02/09/2011 at 8:58 AM
 Full Name: C:\Temp\Demo Docs\1711.PDF
 Record ID:
 Record Title:
 Status: Draft

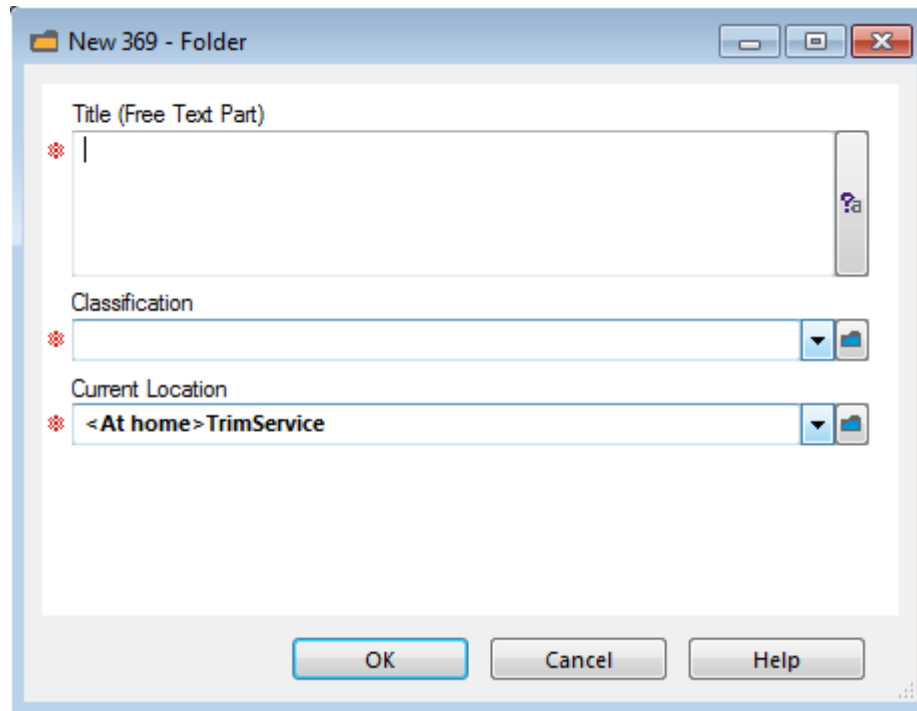
Title (Free Text Part): LEGAL CASE FILE:
 Classification: 1.21.2.636 : FRRDS - LEGAL CASE FILES
 Retention schedule:
 Start Range:
 End Range:

Records - favorite Process Documents in folder - C:\Temp\Demo Docs

Dan Harris CERR 04SRCA-RECMAN

6. SEARCHING METADATA

The metadata search involves finding information contained in the fields for an object. Displayed below is an example of the metadata fields for a Folder record within HPE RM.



The screenshot shows a dialog box titled "New 369 - Folder" with three input fields and three buttons at the bottom. The first field is "Title (Free Text Part)" with a red asterisk icon and a vertical scrollbar. The second field is "Classification" with a red asterisk icon, a dropdown arrow, and a folder icon. The third field is "Current Location" with a red asterisk icon, a dropdown arrow, and a folder icon, containing the text "<At home>TrimService". The buttons are "OK", "Cancel", and "Help".

Some examples of metadata content are:

- Any Word** - Searches both Title & Notes fields at the same time.
- Title Word** - Searches Title field.
- Date Registered** - Date record was entered into HPE RM.
- Date Created** - Date Email/Document was created.
- Classifications (File Plans)** - Displays categories in a hierarchy format.
- Creator** - Name of person who created record in HPE RM.
- Record Number** - Unique number associated with each record.

DOCUMENT CONTENT

A Document Content search will look for terms/values within electronic objects stored in HPE RM.

Types of searchable Electronic Objects include:

- E-Mail (Including Attachments)
- Word
- PowerPoint
- Portable Document Format (PDF)
- Excel
- Other formats containing text information.

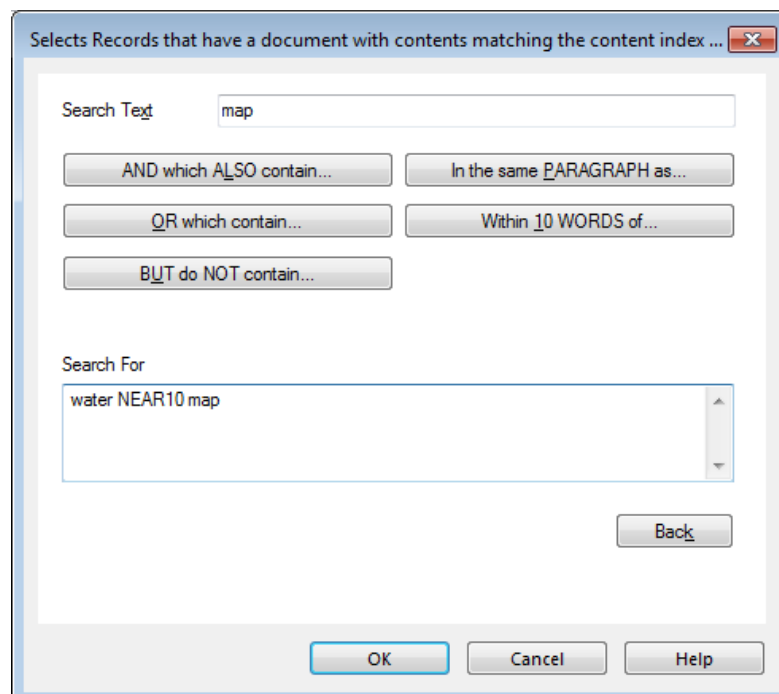
An important feature when performing Document Content searches is the ability to narrow the search using operator functions. For example, you want to locate documents containing Water Map. A search without operators would generate hits on Water as well as Map, with the words not necessarily being near each other. Clicking the Search Options button (Located next to Search) will display a window with additional search options.



Matching criteria
water



In this search, results would include documents containing the word Water within 10 words of the word Map. The number used in this example can be changed to return different results. For example, NEAR5 could be used if the desire was to find terms within 5 words of each other.



Selects Records that have a document with contents matching the content index ...

Search Text: map

AND which ALSO contain... In the same PARAGRAPH as...

OR which contain... Within 10 WORDS of...

BUT do NOT contain...

Search For: water NEAR10 map

Back

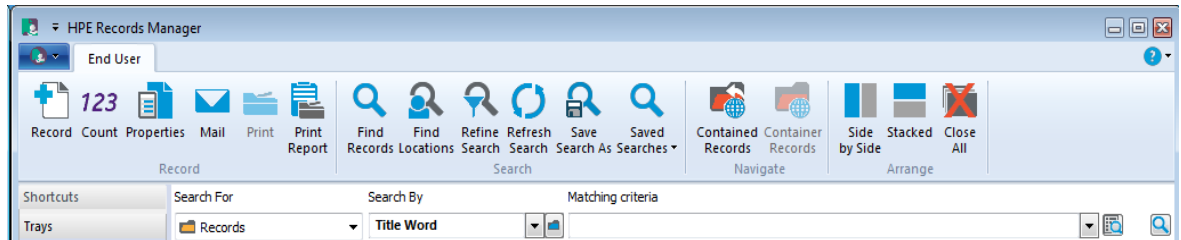
OK Cancel Help


QUICK SEARCH

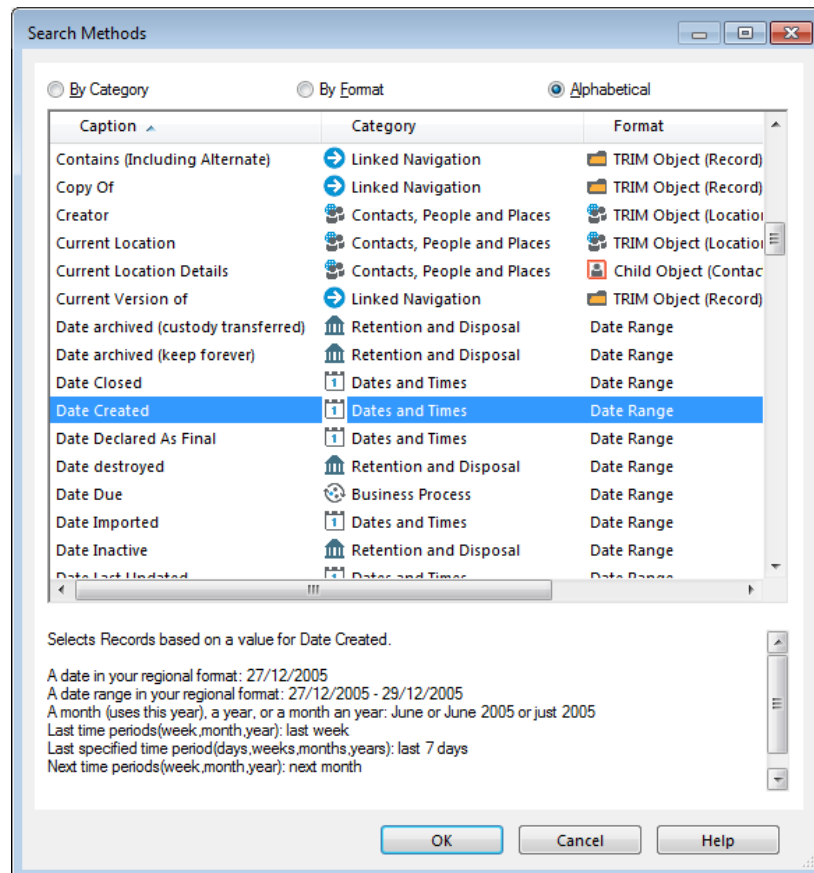
The Quick Search function provides the ability to perform fast searches using a single criteria.

1. Select the object type to **Search For**.

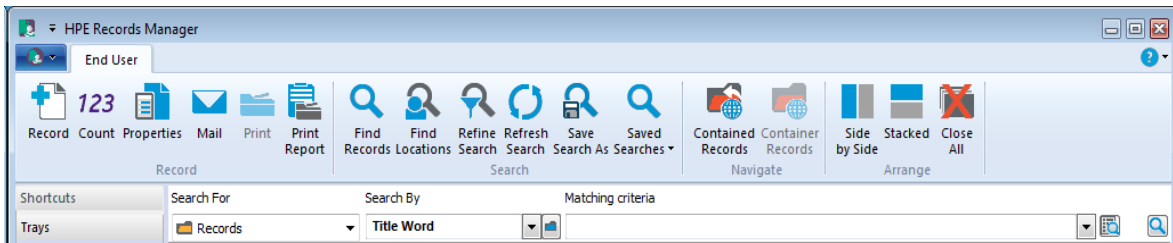
The default selection is **Records**. The drop-down button can be used to select different objects to search for (e.g. Locations, Classifications, etc.).




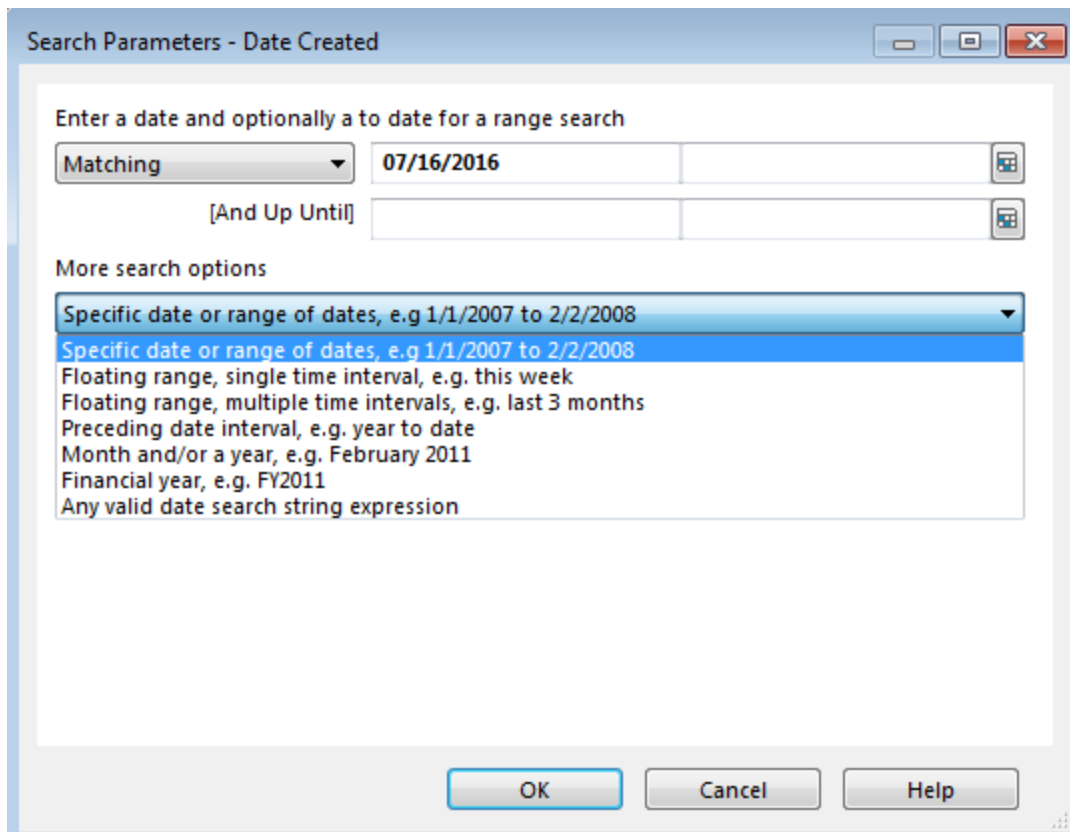
2. Select the fields to **Search By**. Use the KwikSelect  button to select a search method. This will produce a list of the available fields (including Document Content) that can be searched for.




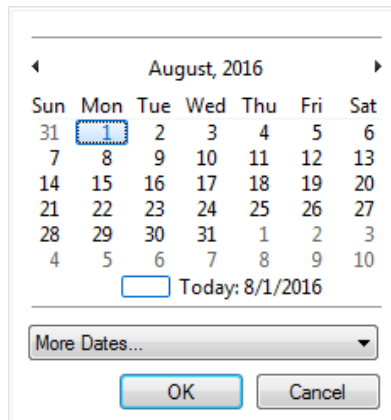
3. Enter the search term(s) in the **Matching criteria** field.



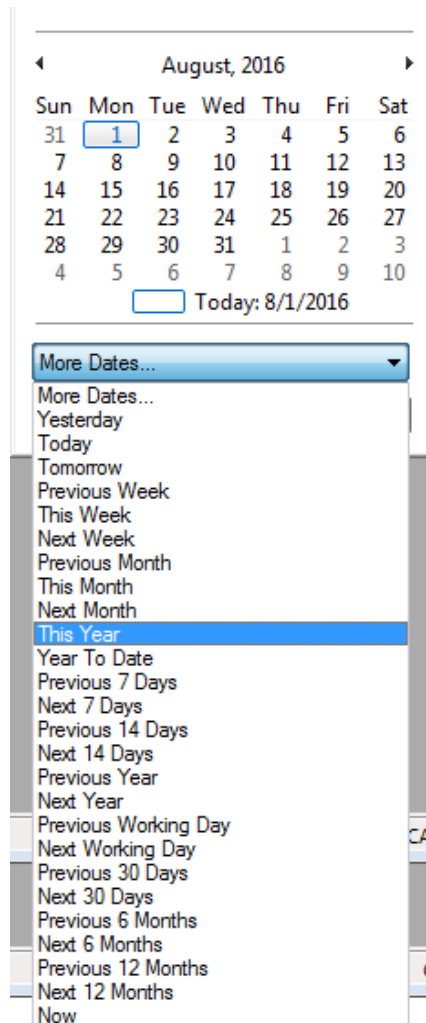
- **Search Options**  : Clicking this button allows the user to modify search parameters. Below are the options available when performing a search for a Date value.



- **Date Selection**  : This button will be available when a Date value is being searched for. Clicking it will display a Calendar from which dates/ranges can be selected.






- In addition, clicking the **More Dates...** button provides the ability to select predefined dates.



4. **Run Search**  : Click to execute the search.

Search For: Records | Search By: Date Created | Matching criteria: 07/16/2016

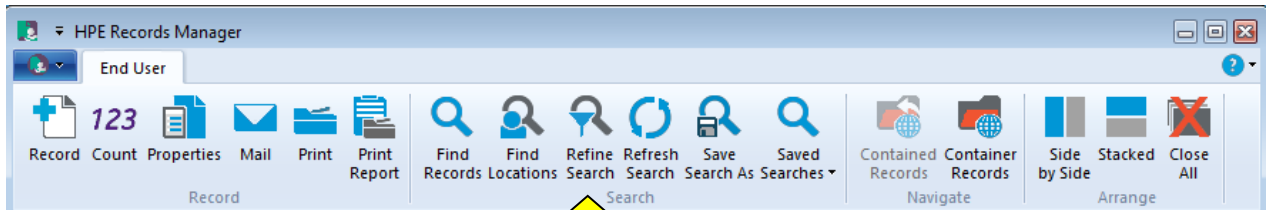
  



REFINING/MULTIPLE CRITERIA SEARCH

It is common to have an initial, or single criteria, search return a large amount of results. Additional criteria can help you reduce the results and find the desired information.

1. Click the Refine Search icon to modify the search criteria of the selected search results.



Note: The Refine Search icon will only be available after an initial search has been performed.

2. The Search for Records window, with the current search method and details you entered, will be displayed.

Search for Records

Search | Filter | Record Types | Sort | Results | Options

Search By: Date Created


Enter floating value type and a single type of time interval
 This | Year
 Use financial year calendar

More search options
 Floating range, single time interval, e.g. this week

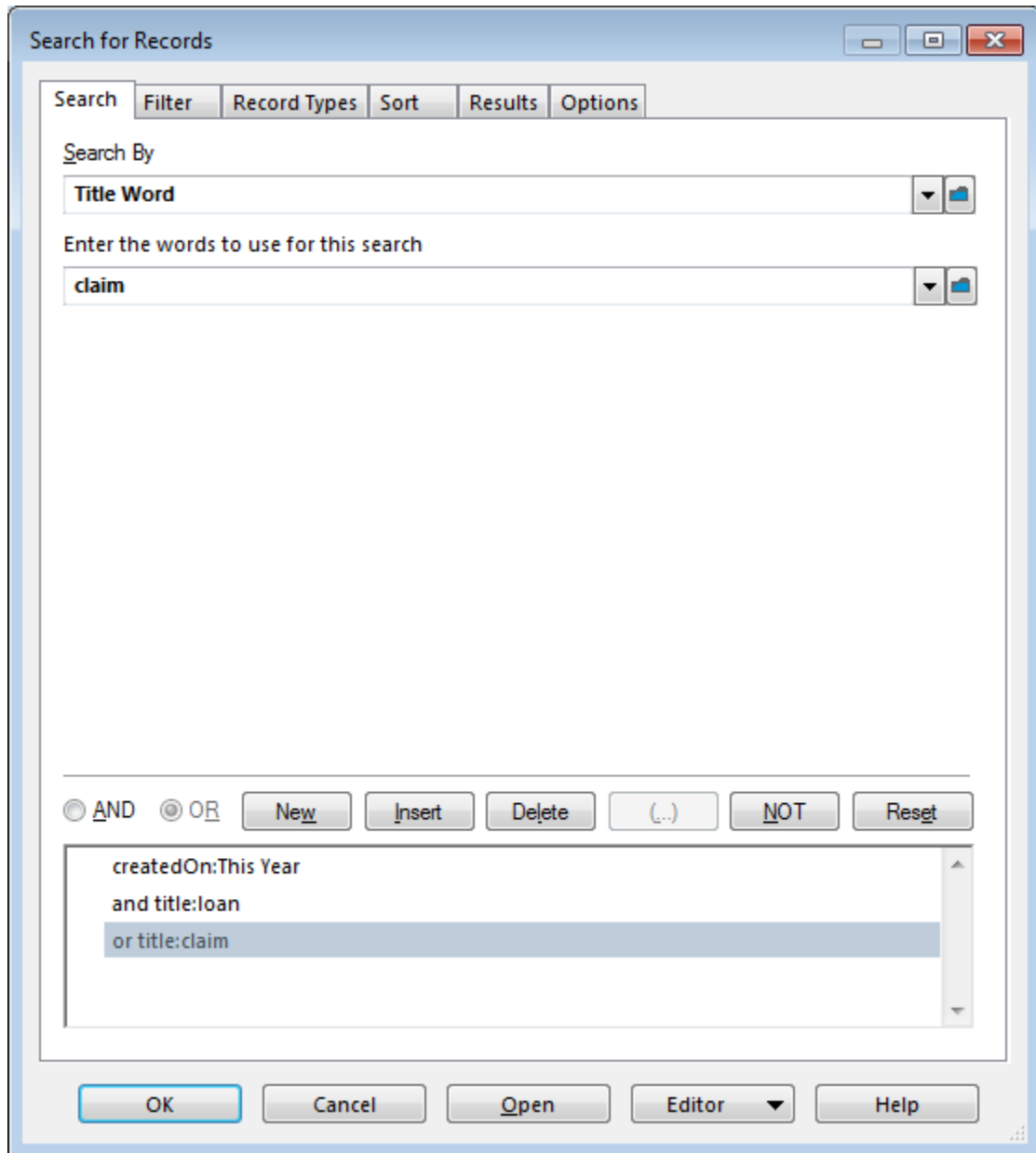
AND OR | New | Insert | Delete | (...) | NOT | Reset

createdOn:This Year

OK | Cancel | Open | Editor | Help

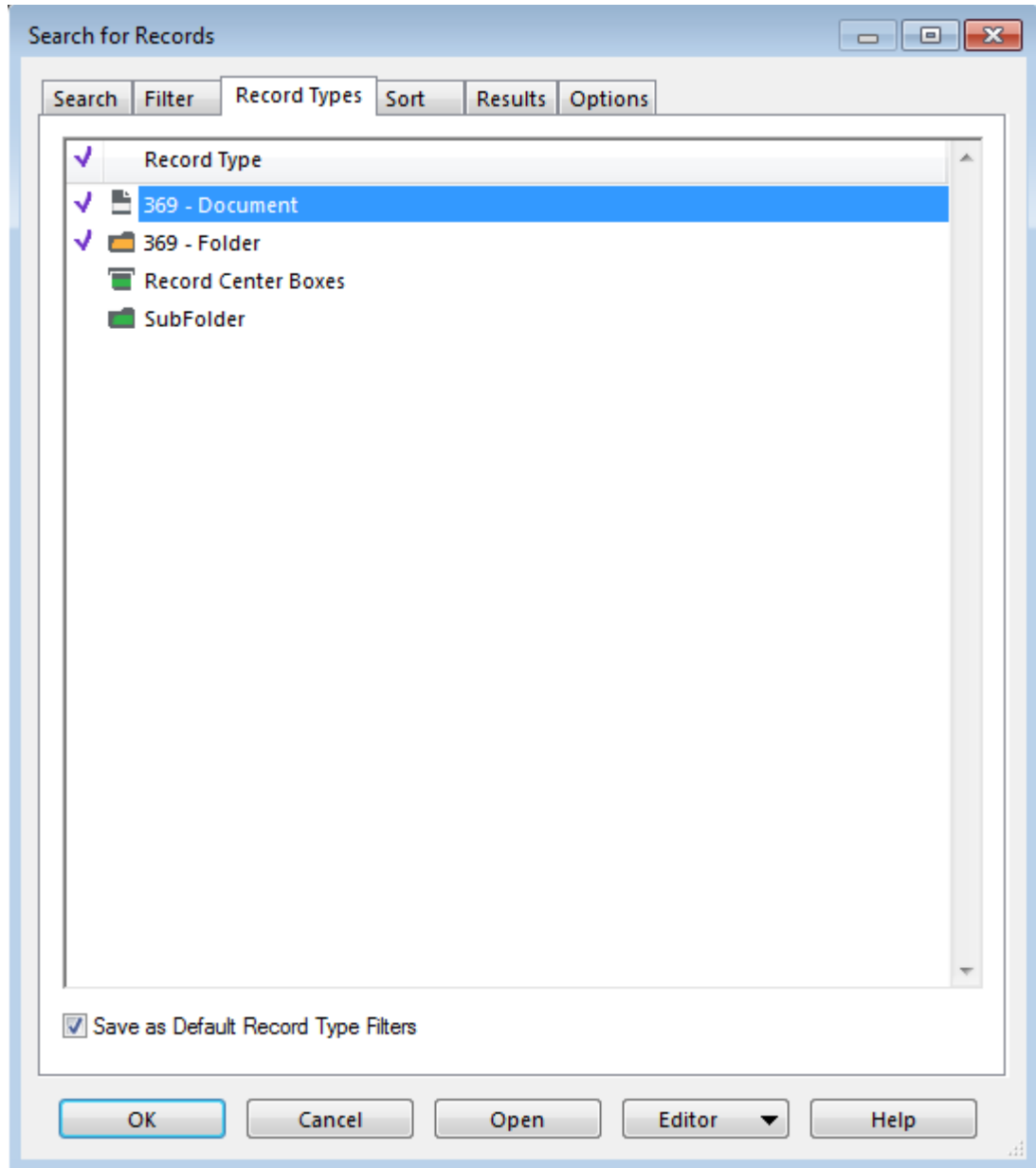
- Change your criteria and/or add new search methods using the New or Insert buttons. Additional criteria can be selected using the KwikSelect  button.
- Use the AND, OR, and NOT buttons to combine, include, or exclude additional criteria.
- Click **OK** to execute the refined search.

Example: This search will look for records this year, that also have the Title Word of Loan or Claim.



RECORD TYPES

When searching for records, you can use the Record Types tab to filter your search results by the Record Types the records available in the system.



- Tag the Record Types whose records you want to include in the search results.

Note: By default, HPE RM will include all Record Types. While some Record Types will be displayed, they may not produce results due to security restrictions. For example, the Sub-Folder is inactive, and Record Center Boxes are restricted to staff within the Records Management Division.

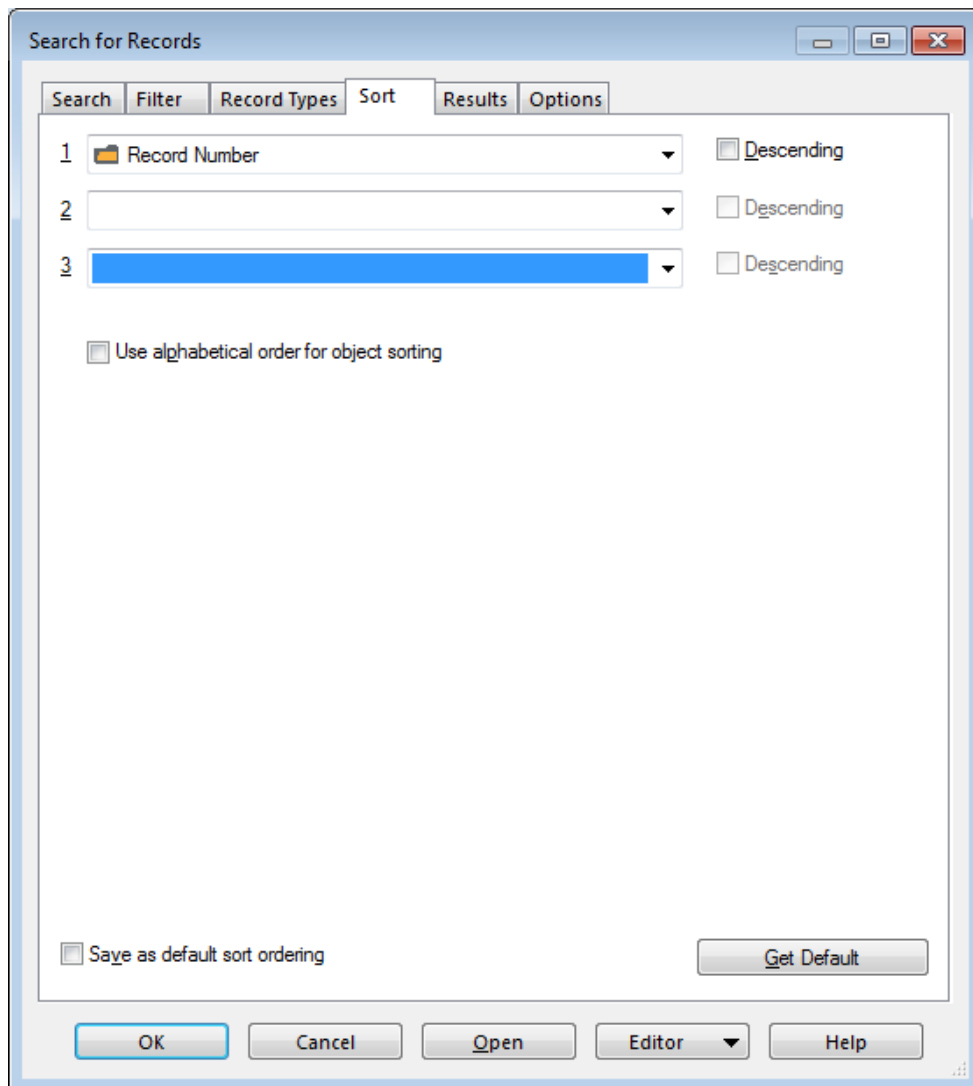
- Clear the tag beside a Record Type you do not want to find records for
- Select the Save as Default Record Type Filters to save your changes to the filter settings for future searches.

Saves the default filters for searches with this particular purpose.

For example, saving the filters for Location searches does not affect default filters set for record searches.

SORT

Selections on the Sort tab can be used to customize the order of the search results.



- **Sort Fields:** Use the drop-down list to select the fields by which you want HPE RM to sort the search results.

The options that are available to you in these drop-down boxes depend on what you are searching for.

- **1,2,3:** There are three levels of sorting that can be applied. HPE RM will sort the list by the field in the first box, then by the field in the second box and finally by the field in the third box.
- **Descending:** Select for descending sort order.

By default, HPE RM sorts a list in ascending order of its sort field - with the lowest numerical, date or alphabetical value at the top of the list and the highest value at the bottom.

- **Use alphabetical order for object sorting:** This option sorts a result alphabetically by either Record Type, Classification, Schedule or Consignment.
- **Save as Default Sort Fields:** Saves the selected sort options as the default for all future searches.

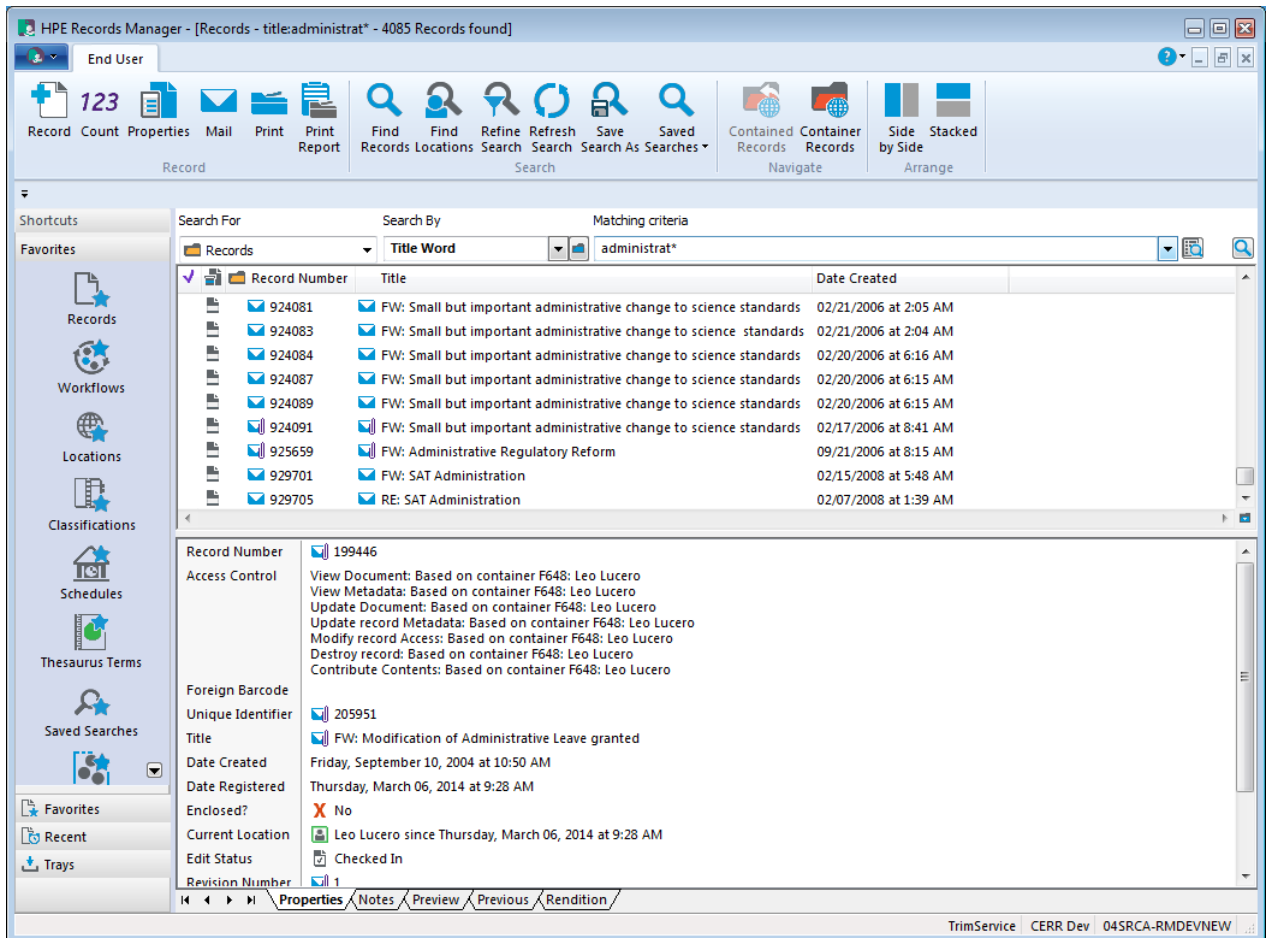
Note:

- *Sort order does not work for records within a container. This includes both sorting in the Search dialog box or by the column headers. For example, you can expand a container in your search result to see the contained records. However, when you sort by any of the columns, nothing changes in the order of the items in the container. This is normal behavior of sorting in tree boxes where only items at the top level of the hierarchy are sorted.*
- *When you sort by HPE RM items like Category, Record Type, Retention Schedule or Media Type, the results are grouped rather than sorted, which is expected behavior because of the underlying code.*

WILDCARDS

A wildcard is a symbol that stands for one or more unspecified characters, which is useful when searching text. In HP Records Manager, the asterisk (*) is used.

For example, to search for the variations on the title word **Administration**, you would type **Administrat***. The search will look for variations on the word **Administrat**, e.g. **Administration**, **Administrator**, **Administrative**, **Administration's**, etc.



SEARCH RESULTS

The results of a search will be displayed in the main application area, and like many of the windows in HPE RM is divided into two portions:

- List pane (Top portion): Displays the results in a list.
- View pane (Bottom portion): Displays details for the selected item in the List Pane. The View Pane contains additional tabs revealing more information about the selected record:
 - **Properties:** Displayed by default, and lists individual fields that comprise a record's metadata.
 - **Notes:** Displays the contents of the Notes field.
 - **Preview:** Displays a preview of the current version of the electronic document.
 - **Previous:** Displays the previous version of an electronic document.
 - **Rendition:** Displays the most recent rendition of an electronic document.

Record Number	Title	Date Created
924081	FW: Small but important administrative change to science standards	02/21/2006 at 2:05 AM
924083	FW: Small but important administrative change to science standards	02/21/2006 at 2:04 AM
924084	FW: Small but important administrative change to science standards	02/20/2006 at 6:16 AM
924087	FW: Small but important administrative change to science standards	02/20/2006 at 6:15 AM
924089	FW: Small but important administrative change to science standards	02/20/2006 at 6:15 AM
924091	FW: Small but important administrative change to science standards	02/17/2006 at 8:41 AM
925659	FW: Administrative Regulatory Reform	09/21/2006 at 8:15 AM
929701	FW: SAT Administration	02/15/2008 at 5:48 AM
929705	RE: SAT Administration	02/07/2008 at 1:39 AM

Record Number	199446
Access Control	View Document: Based on container F648: Leo Lucero View Metadata: Based on container F648: Leo Lucero Update Document: Based on container F648: Leo Lucero Update record Metadata: Based on container F648: Leo Lucero Modify record Access: Based on container F648: Leo Lucero Destroy record: Based on container F648: Leo Lucero Contribute Contents: Based on container F648: Leo Lucero
Foreign Barcode	
Unique Identifier	205951
Title	FW: Modification of Administrative Leave granted
Date Created	Friday, September 10, 2004 at 10:50 AM
Date Registered	Thursday, March 06, 2014 at 9:28 AM
Enclosed?	No
Current Location	Leo Lucero since Thursday, March 06, 2014 at 9:28 AM
Edit Status	Checked In
Revision Number	1



- Counting

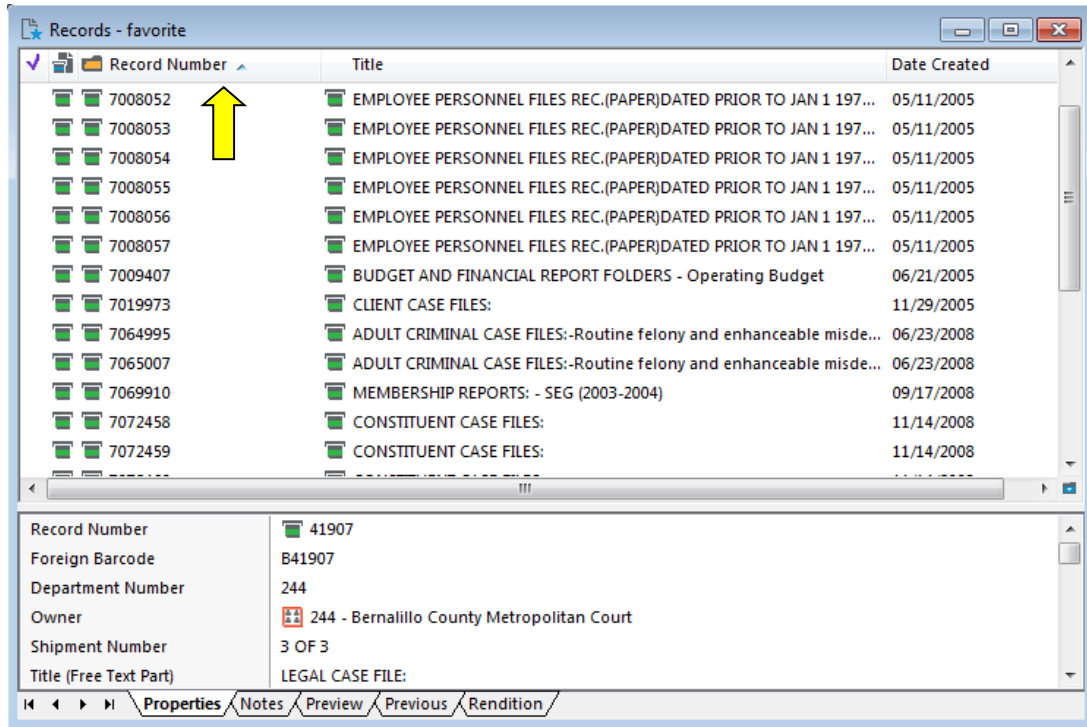
The search results can be counted by clicking the count button.

The screenshot shows the HPE Records Manager interface. At the top, a toolbar contains a 'Count' button with the number '123' next to it, highlighted by a yellow arrow. Below the toolbar, a search results table is visible with columns for Record Number and Title. A dialog box titled 'HPE Records Manager' is overlaid on the table, displaying '4,085 Records found' and an 'OK' button. The interface also includes a sidebar with navigation options like 'Records', 'Workflows', and 'Locations', and a search bar with 'administrat*' entered.

- **Sorting**

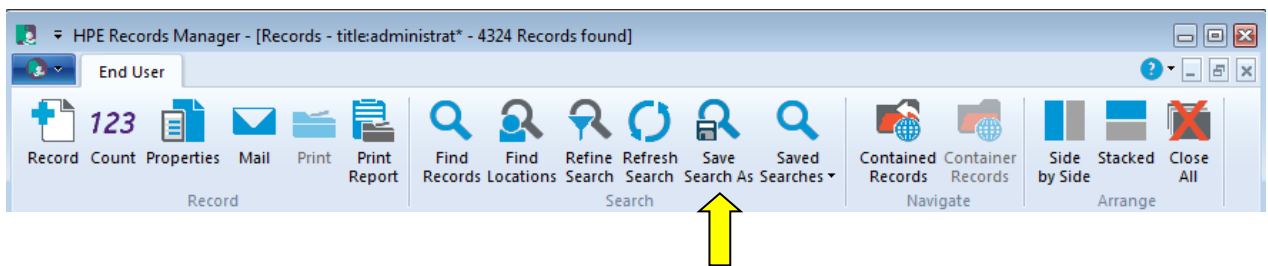
The search results displayed in the List Pane can be sorted by clicking on a column header.

Clicking a header once will sort in ascending  order, clicking again will sort in descending  order.



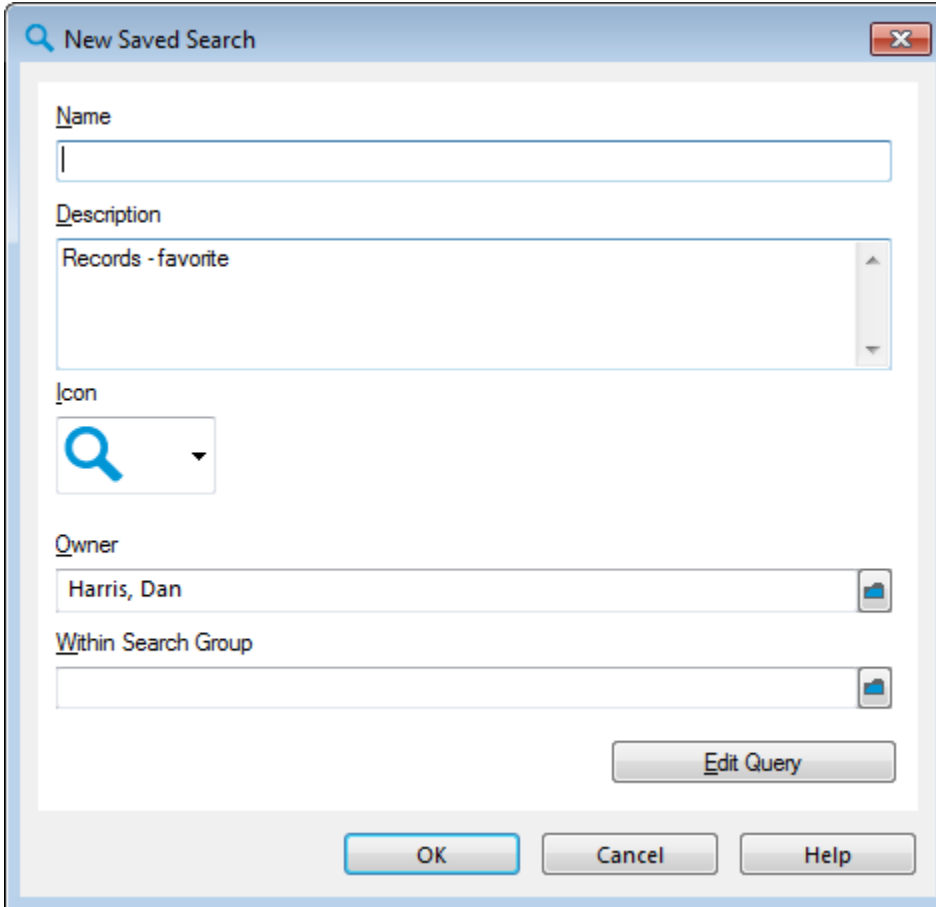
- **Saving Searches**

After a search has been completed it can be saved, which saves the search parameters, the filters and other options as well as the column configuration for the search results.



1. Click the **Save Search As** button located on the **Search** tab.

2. The **New Saved Search** dialog will be displayed.



The screenshot shows a dialog box titled "New Saved Search". It has a search icon in the top left and a close button in the top right. The dialog contains the following fields and controls:

- Name:** An empty text input field.
- Description:** A text area containing the text "Records - favorite".
- Icon:** A dropdown menu showing a search icon.
- Owner:** A text input field containing "Harris, Dan" and a small blue icon to its right.
- Within Search Group:** An empty text input field and a small blue icon to its right.
- Buttons:** An "Edit Query" button is located below the "Within Search Group" field. At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

3. Enter the saved search details.

- **Name** - Maximum of 50 characters - the name for the saved search.
Use a name that will be easy to find the next time you want to use the search.
- **Description** - Description of the search criteria, entered by HPE RM.
This description can be edited.
- **Icon** - You can select an icon that HPE RM will use for the search in lists, or leave as the default value.
- **Owner** - Choose from the HPE RM Locations who should have access to this search.
 - **Person** - only the owner has access to the saved search, it is private

- Blank - everyone has access to the saved search, it is public
- Group - only members of the group have access to the search.
- **Within Search Group** - Enter the search group to save the search in.

Type a new group name and Records Manager will ask whether a new search group should be created.

Search groups help organize saved searches, but are not saved searches themselves.

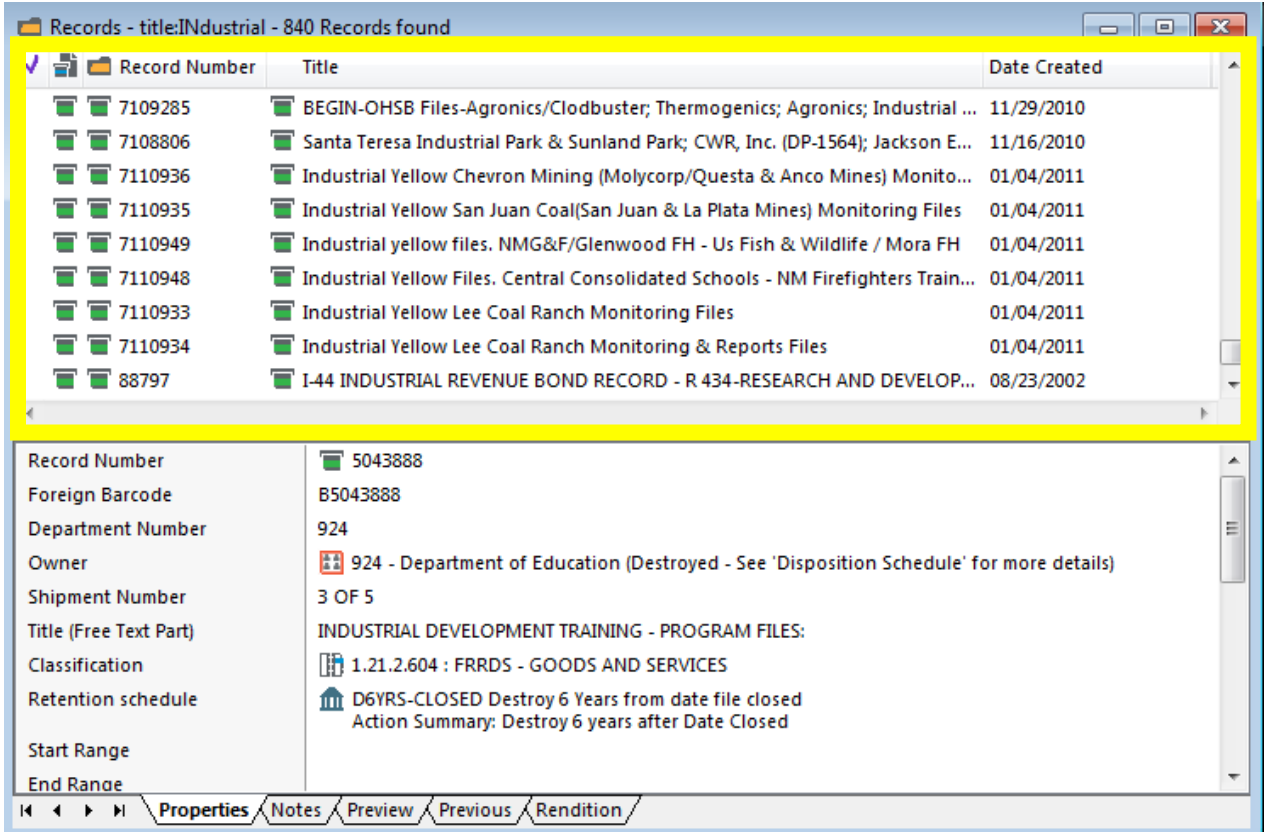
4. To set specific sort and filter options, click **Edit Query**, which returns you to the **Search for Records** dialog box.
5. Select them from the **Sort, Filter** and **Record Types** tabs and click **OK** when you are done.
6. To set specific Access Controls for the saved search, set them on the **Access Controls** tab.
7. Click **OK**.

HPE Records Manager saves the search and you can now access it by clicking **Search->Saved Record Searches**.

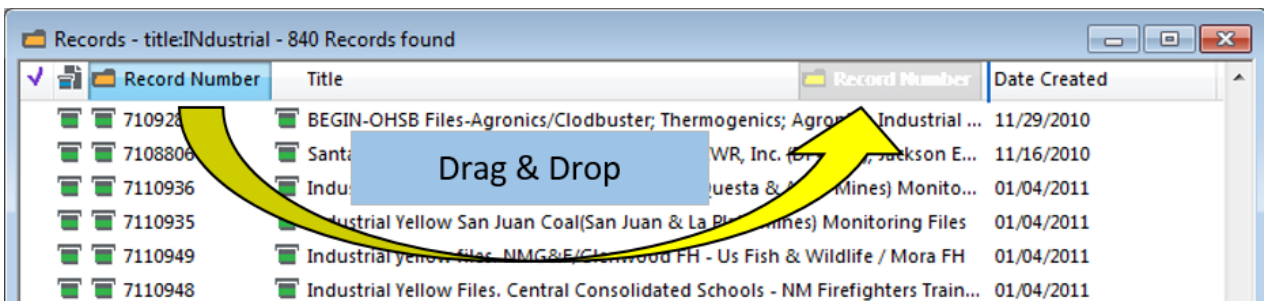
If a saved search with that name exists already, a message will ask you whether you want to overwrite the existing search.

MODIFYING THE LIST PANE

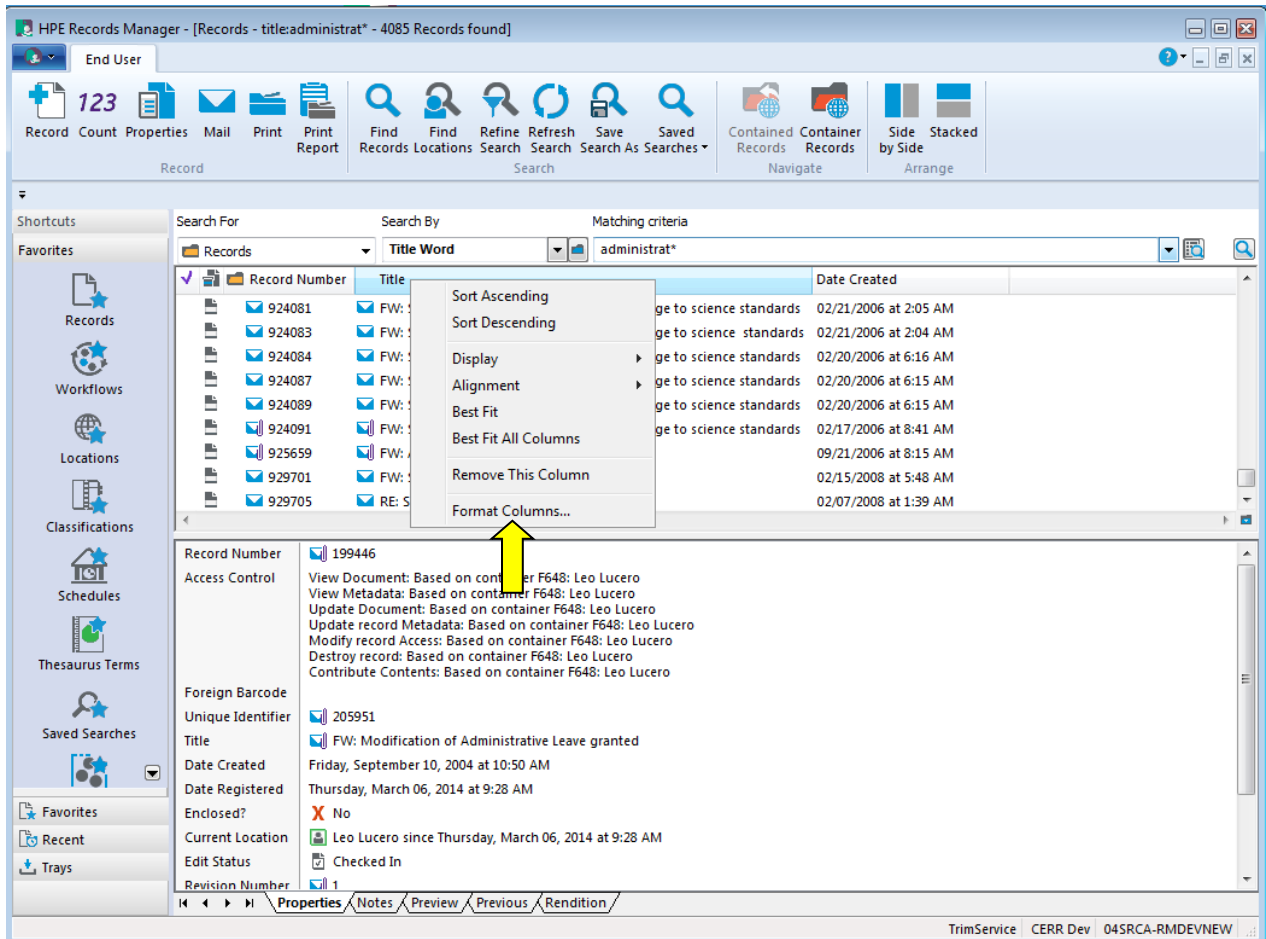
The display of the contents in the List Pane can be modified to include additional columns, sort order, and column placement.



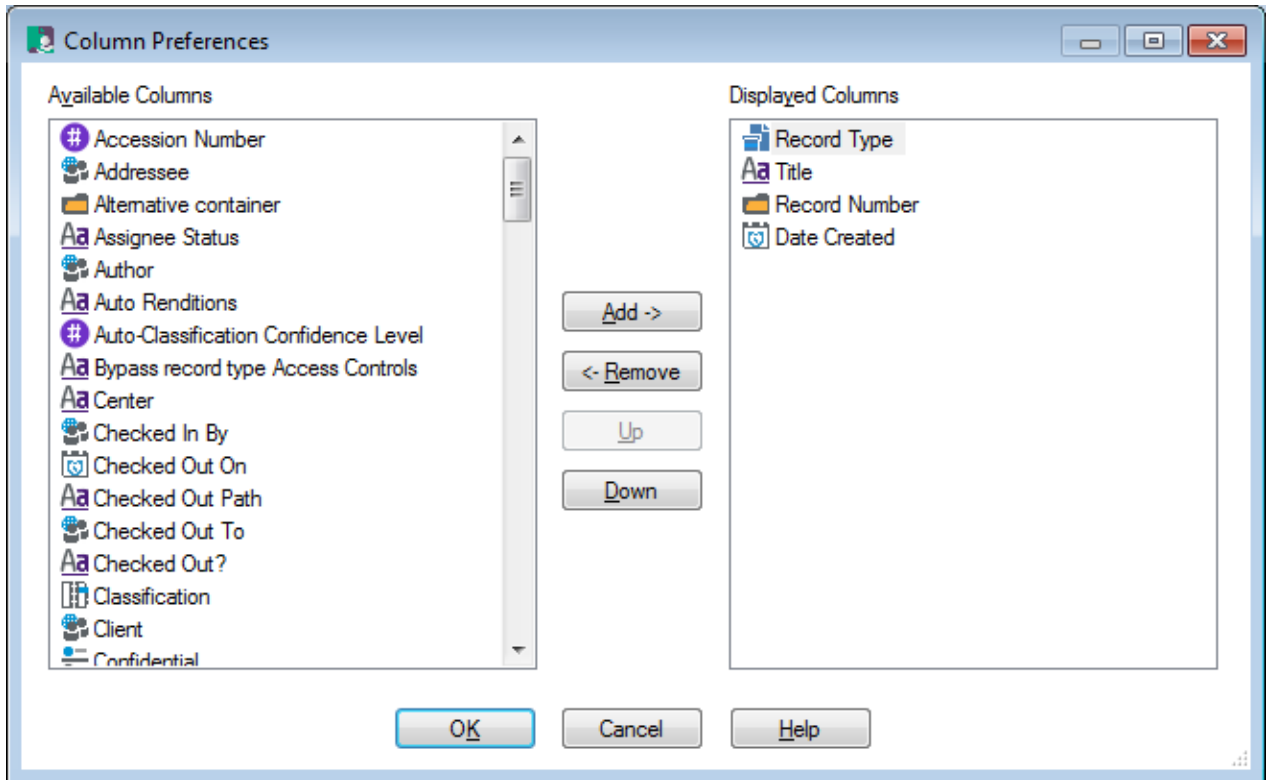
Columns can be moved by clicking on a column header, and then dragging it to the desired position.



Columns can be added (or removed) by positioning the cursor above one of the column headings, right-clicking, and selecting **Format Columns**.



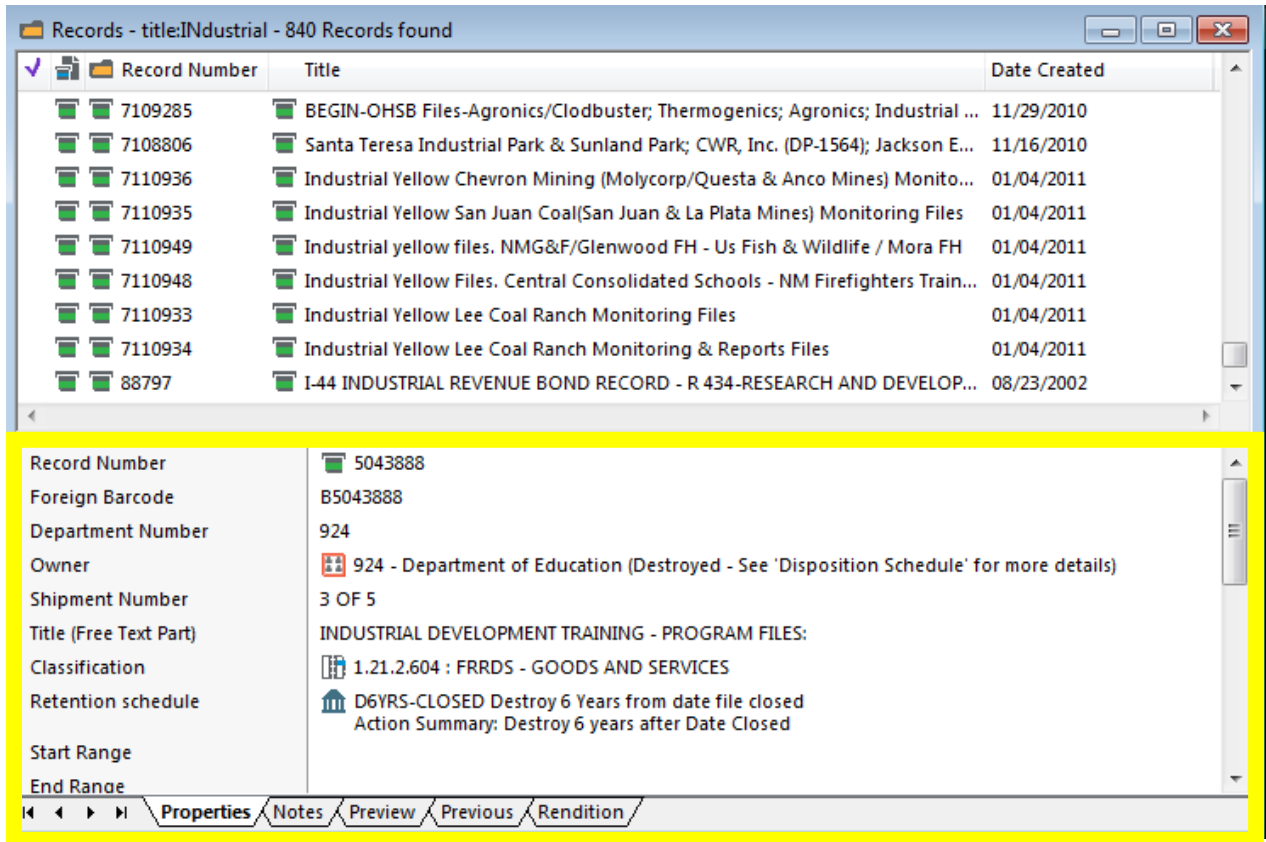
The Column Preferences dialog will be displayed.



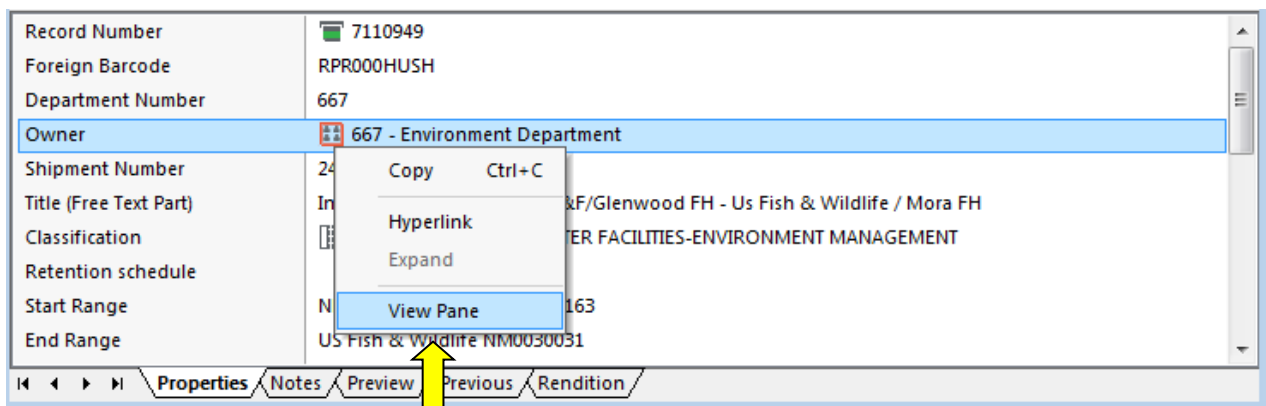
- **Available Columns** – Available columns for the current list.
- **Displayed Columns** – Active columns in the current list.
- **Add** – Click to add the selected column from the **Available Columns** list to the **Displayed Columns** list.
- **Remove** – Click to remove the selected column from the **Displayed Columns** list.
- **Up / Down** – Click to move a column up or down the list, changing the position the column appears in.

MODIFYING THE VIEW PANE

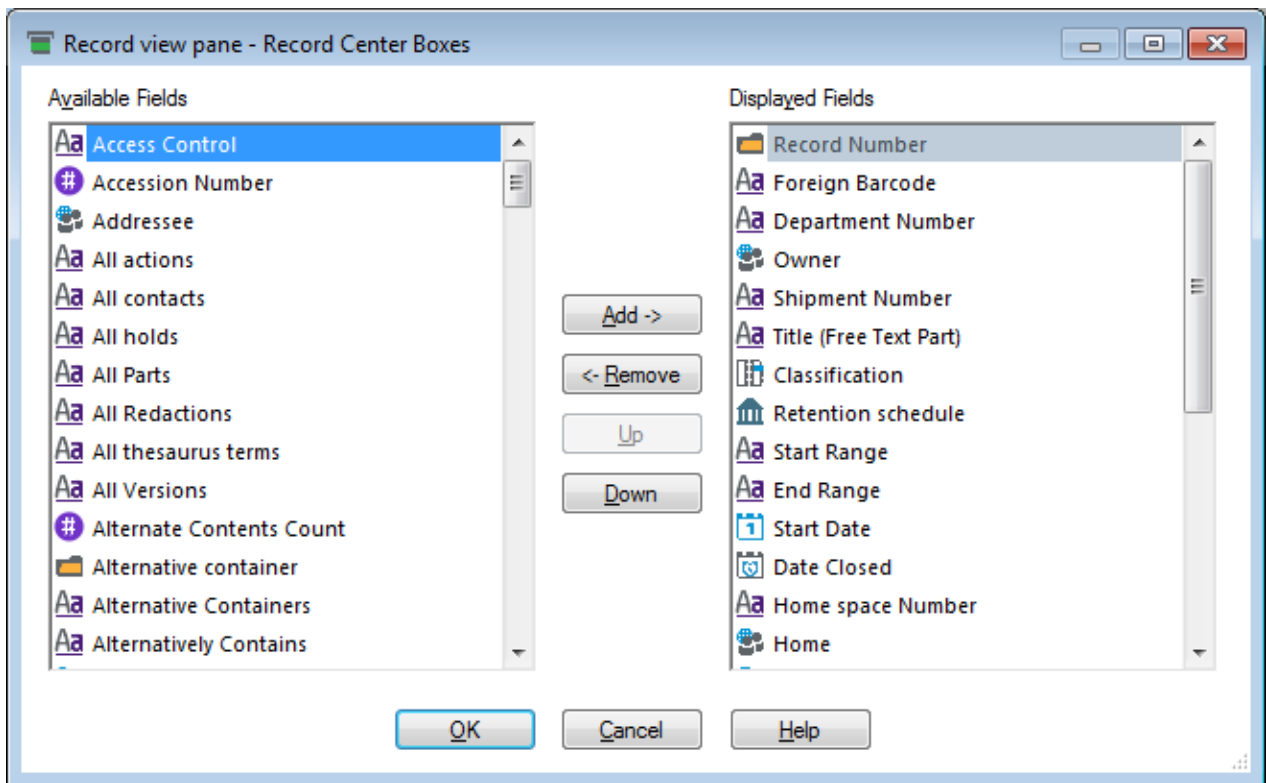
The content of the View Pane can be modified to include additional fields, and sort order.



1. Fields can be added (or removed) by positioning the cursor in the View Pane, right-clicking, and selecting **View Pane**.



2. The **View Pane** dialog will be displayed.



- To add a field, select it in the **Available Fields** list and click **Add** to add it to the **Displayed Fields** list.
- When you add a field, HPE Records Manager removes it from the **Available Fields** list.
- To remove a field, select a field in the **Displayed Fields** list and click **Remove**.
- When you remove a field, HPE Records Manager adds it to the **Available Fields** list.
- To move a field up or down the list, use the **Up** and **Down** buttons.

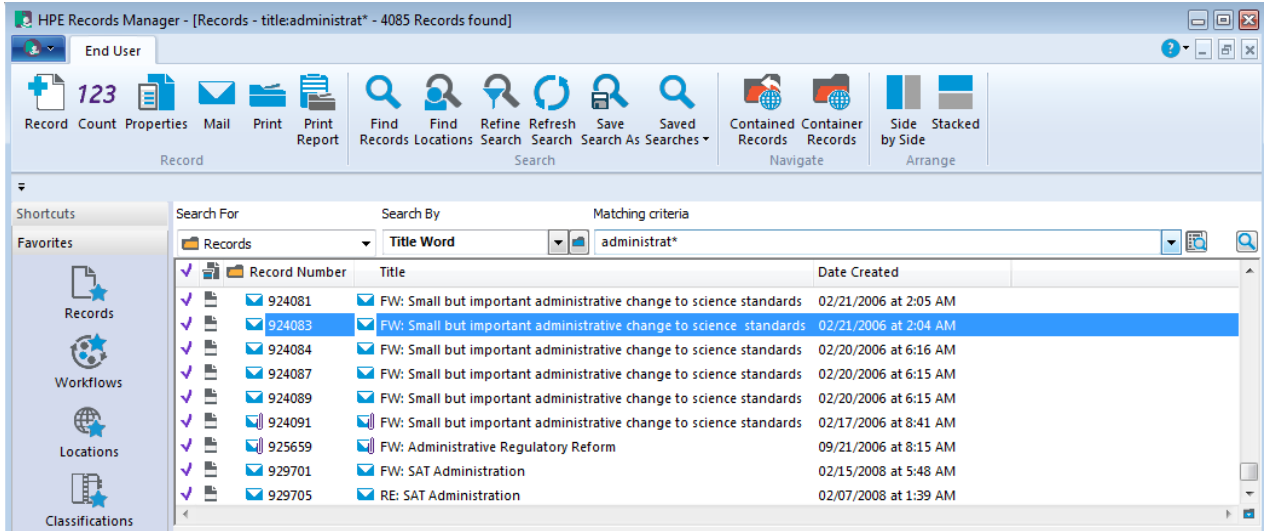
3. Click **OK** to save your changes.

Note: Modifying the view pane on a record search results list will only make changes to the view pane for the Record Type of the selected record in the list pane. You can modify the view pane for each Record Type.

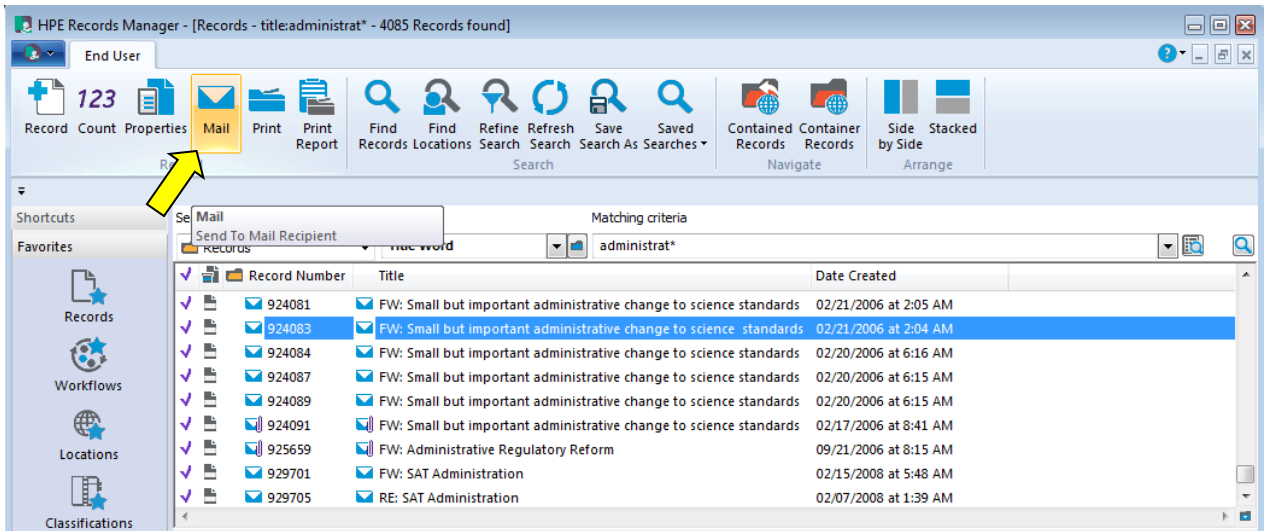
7. SENDING RECORDS/LINKS VIA EMAIL

HPE RM enables you to send details about record(s) with the attached electronic document (if applicable) to an email address.

1. Perform a search and tag the desired records.

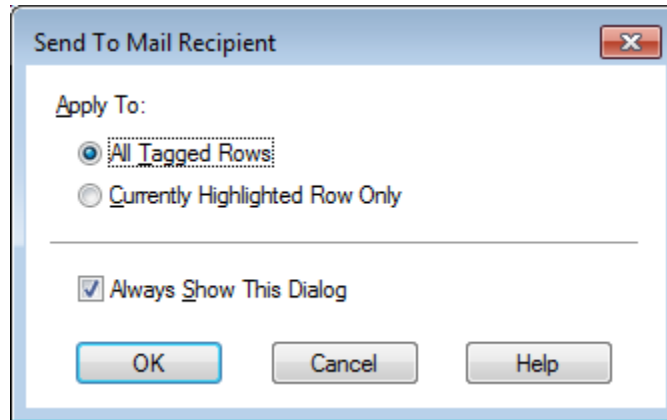


2. From the toolbar select the **Mail** button.

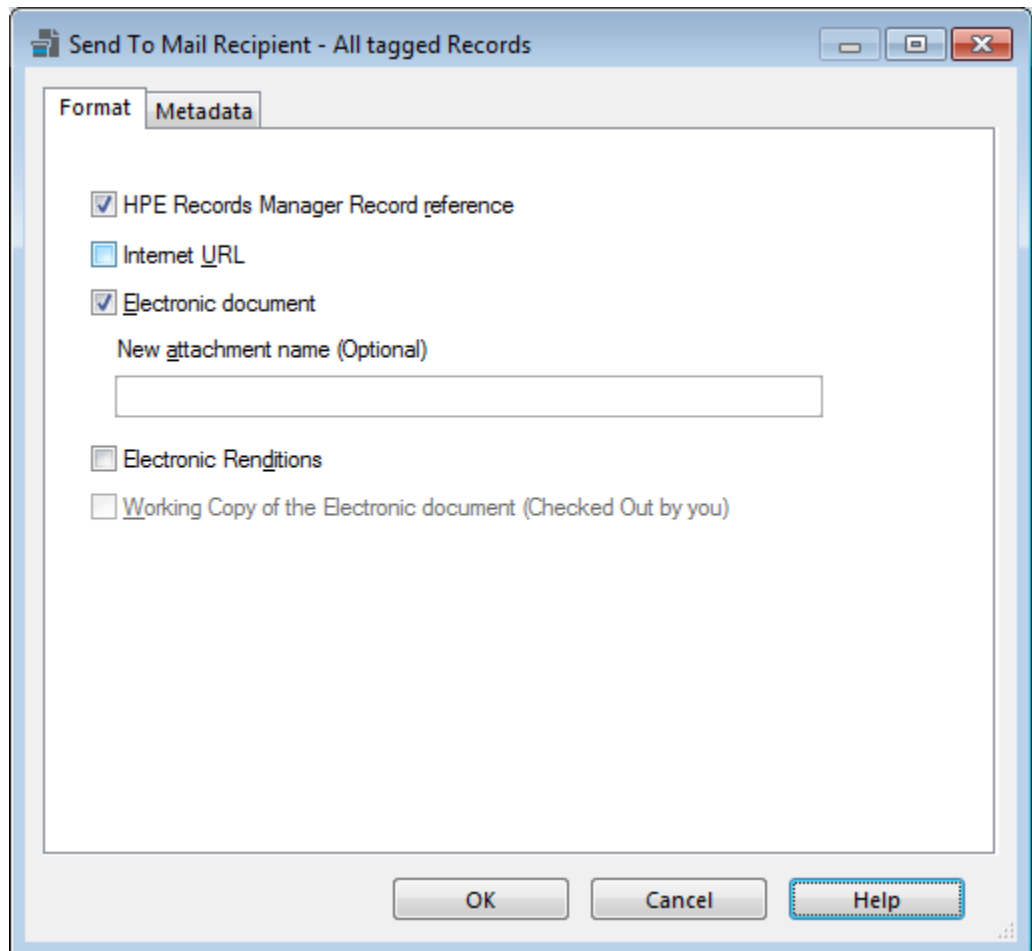


3. The **Send To Mail Recipient** dialog box will be displayed. Click **OK**.

- *If you have unselected the “always show this dialog” box, this screen will not be displayed.*



4. The **Format** tab of the options dialog for sending mail will be displayed. This enables you to set which attachments to include in the email and how to attach them.

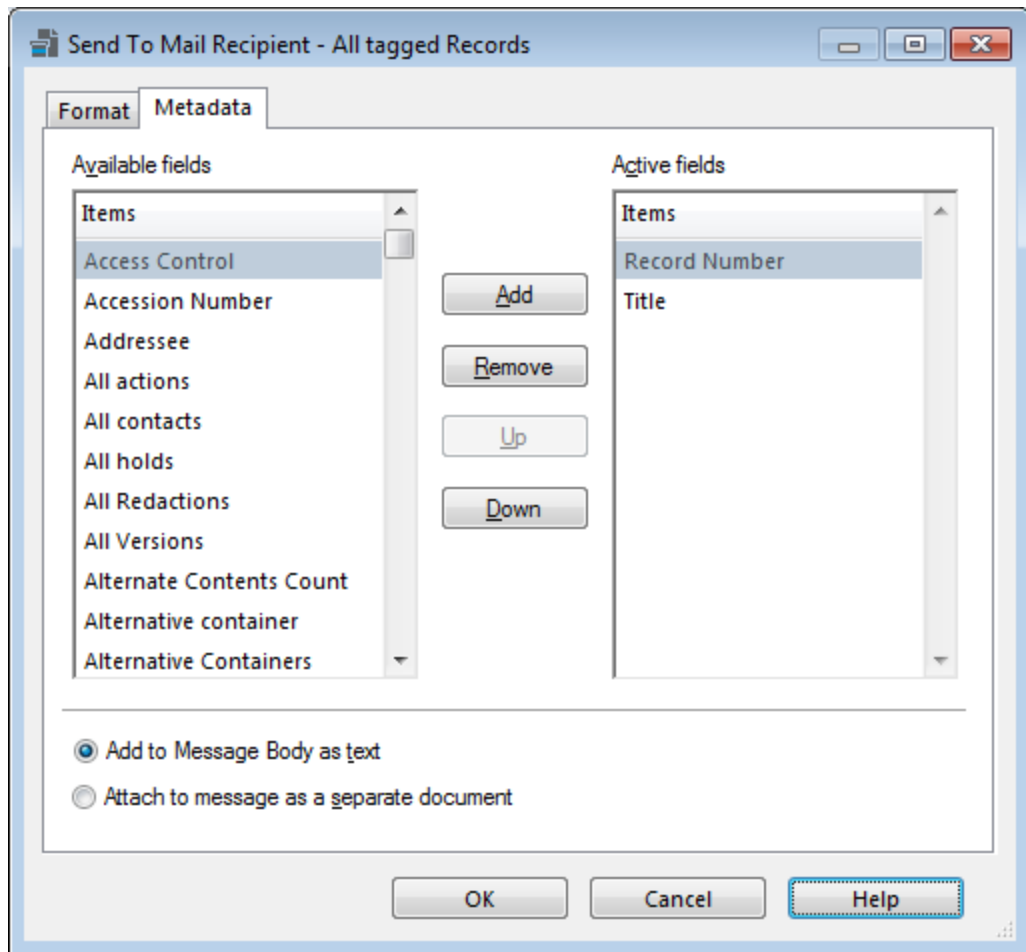


- **HPE Records Manager Record Reference** - Sends a HPE RM record reference link. It is recommended to use this option if the email is being sent to an HPE RM user.
 - **Internet URL** - Sends a HPE RM Web client or WebDrawer URL for email recipients to view a document using a Web browser

 - **Electronic Document** - Sends a copy of the electronic document. Use this option if the email is being sent to someone that is **not** an HPE RM user.
 - **New Attachment Name (Optional)** - Renames the electronic document, different to the original.

 - **Electronic Renditions** - Sends a copy of any renditions of the associated document

 - **Working Copy of the Electronic document (Checked Out by you)** - Checks out the electronic document and includes it in the email.
5. The **Metadata** tab displays the list of fields available for a record that can be included in the email. Highlight the desired fields and use the Add/Remove buttons to define the information to include in the email.



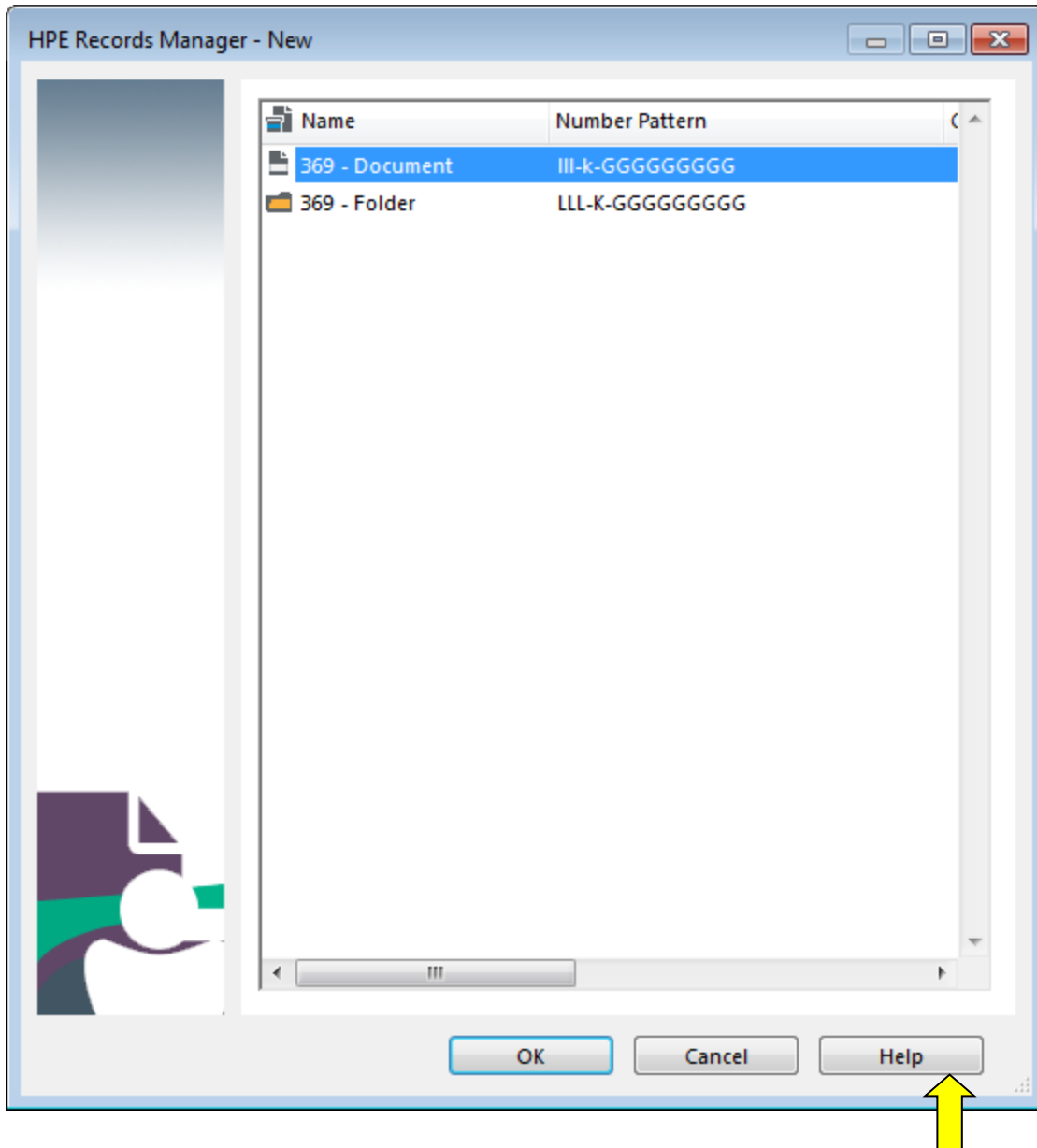
- **Add to Message Body as text** - Inserts the record's metadata in the email message rather than as an attachment to the email
- **Attach to Message as a Separate Document** - Attaches the metadata to the email as a separate document, rather than as part of the email's text

8. HELP

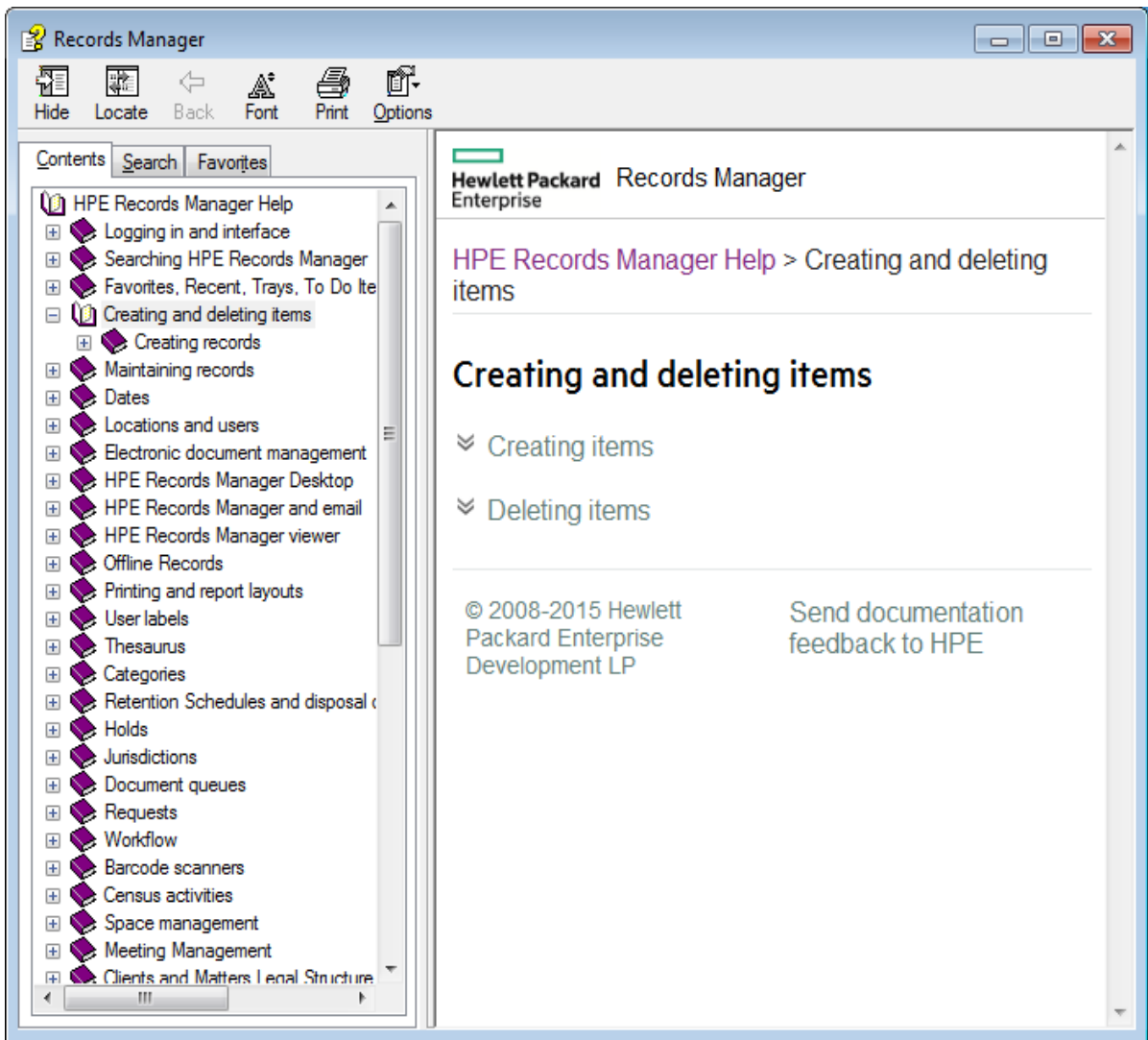
HPE RM comes with “Context sensitive” help. This means that clicking the **Help** button when performing a function will provide information regarding that specific topic.

Example:

This is the Create New Record dialog.



Clicking the **Help** button will take you to the section concerning creating records.



In addition, clicking the **Search** tab will allow you to enter the desired topic. Click the **Display** button to view the selected entry.

The screenshot shows the Hewlett Packard Records Manager Enterprise application. The interface is divided into two main sections. On the left is a search and navigation pane, and on the right is the main content area displaying help information.

Search and Navigation Pane:

- Buttons: Hide, Locate, Back, Font, Print, Options.
- Tabs: Contents, Search, Favorites.
- Search input: "Type in the word(s) to search for:" with the text "interface" entered.
- Buttons: List Topics, Display.
- Text: "Select topic: Found: 55" with a yellow arrow pointing to the "Display" button.
- Table of search results:

Title	Location	Page
HPE Records Mana...	HPE Recor...	1
Setting up Records ...	HPE Recor...	2
The interface	Records M...	3
System Options Obj...	Records M...	4
The User Interface	HPE Recor...	5
File menu	HPE Recor...	6
System Options Co...	Records M...	7
Import Processing	HPE Recor...	8
DataPort Project	HPE Recor...	9
System Options Sec...	Records M...	10
Custom Data Format...	HPE Recor...	11
Key functions of the...	Records M...	12
Export Processing	HPE Recor...	13
Double-click functions	Records M...	14
Windows and dialog...	Records M...	15
Legal Notices	HPE Recor...	16
Shortcut keys	Records M...	17

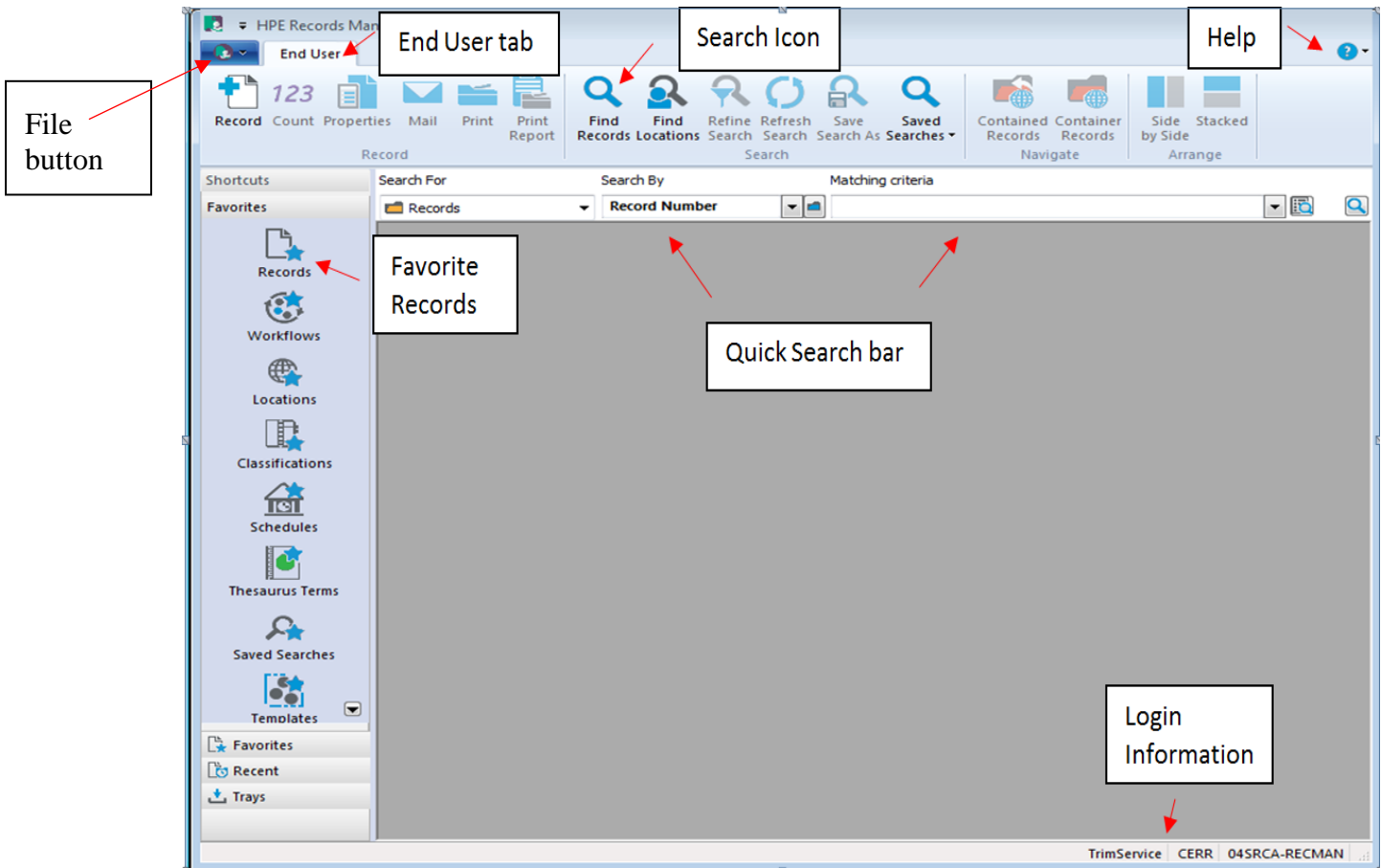
Search options:
 Search previous results
 Match similar words
 Search titles only

Main Content Area:

- Header: Hewlett Packard Records Manager Enterprise
- Breadcrumbs: HPE Records Manager Help > Logging in and interface > The interface
- Section Title: The interface
- Text: "This section describes the interface for HPE Records Manager and how to customize it."
- Text: "You can access all functions in HPE Records Manager by choosing an option from a menu or the toolbar."
- Text: "When using the menu, you can use the mouse and/or keyboard."
- Text: "You can only use the toolbar with the mouse."
- Text: "When a command is available from both the menu and toolbar, the instructions in this guide tell you which to select."
- Text: "To bypass the menu, click the toolbar button."
- Section: Related Information

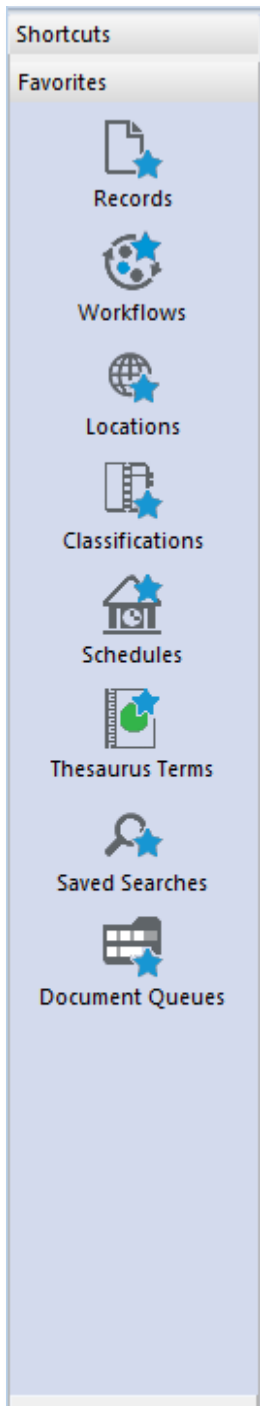
9. APPENDICES

I. HPE RECORDS MANAGER HOME SCREEN



II. SHORTCUTS

On the left hand side of the screen is the shortcuts bar. There are three groups of shortcuts.

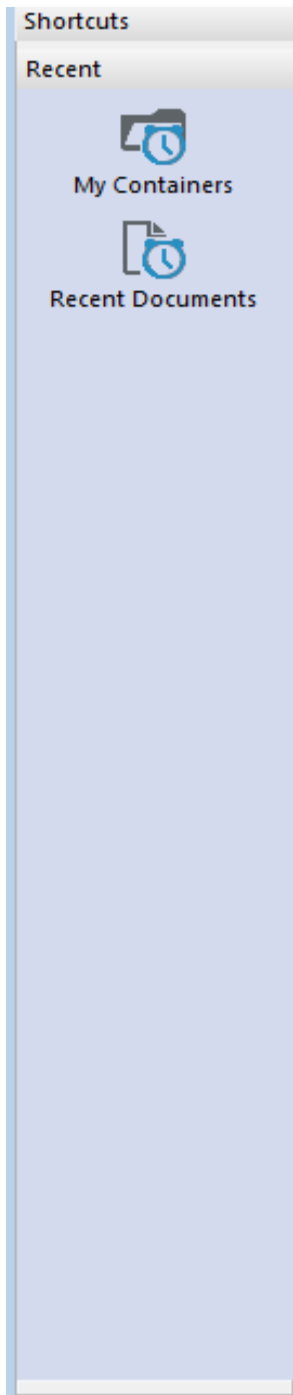


The **Favorites Bar** contains icons for quick and easy access to many items that you select for yourself. The display of these icons are user type specific and items can be added or removed on demand as needed.

To add the desired item(s) as a favorite, highlight, **right-click**, and select **Send To->Favorites**. Alternatively, you can select any item(s) and press the **F4** key.

To remove unwanted item(s), highlight, **right-click**, and select **Remove From->Remove from Favorites**.

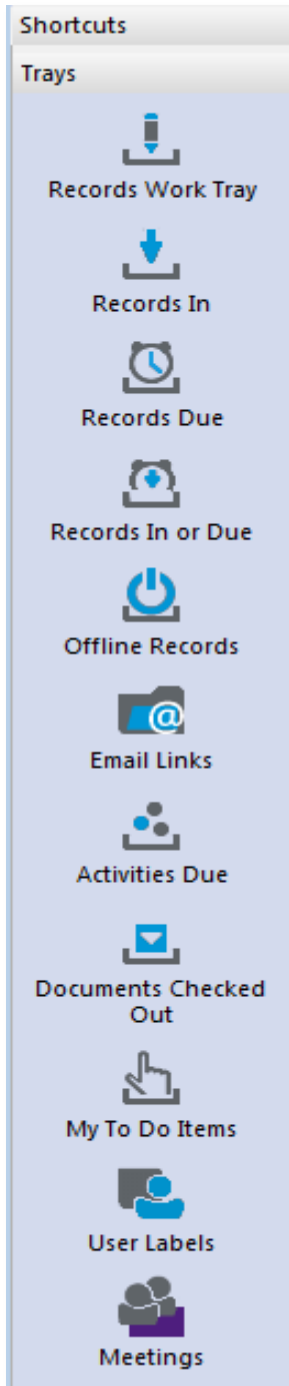
Alternatively, you can select the item(s) to remove and press the **Control+Delete** keys at the same time.



The **Recent Bar** contains icons for accessing records that have been recently used or created.

My Containers - displays the Electronic Container records that you have used recently, up to a limit of 25 containers

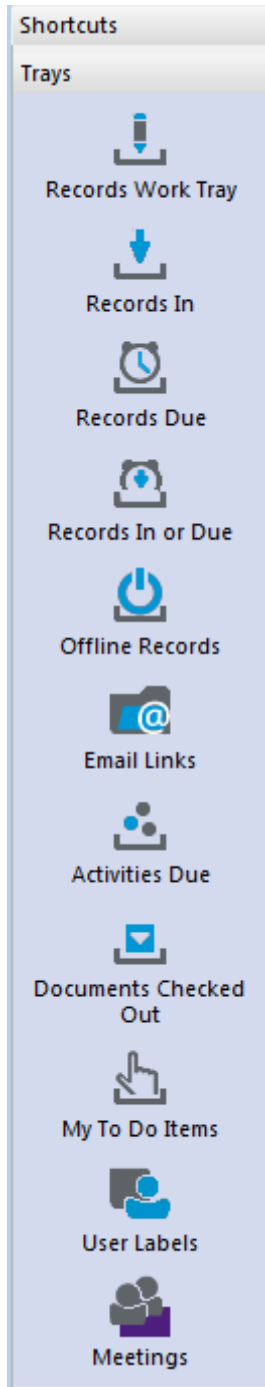
Recent Documents - displays the last 25 Electronic Document records you created or edited



The **Trays Bar** contains shortcuts to items that match certain criteria. Click a tray to see the items that HPE RM automatically associated with it.

When an item does not fit the tray criteria any more, for example because a record is not assigned to you any more, HPE RM removes them from the tray automatically, as well.

- **Records Work Tray** - Displays all items you have sent here using right-click - Send To->Add To Records Work Tray.
- **Records In** - Displays all records that are assigned to you or your default Position Location. These are the records where your name or your default position is in the Assignee field. The Records In tray only displays records that are assigned to the user that is currently logged in. Records assigned to Home will not appear even though Home and Assignee may be the same.
- **Records Due** - Displays all records with Actions due assigned to you or your Position. The Records Due tray will display records that meet the following criteria:
 - They have an Action with your Location in the Responsible Location field.
 - The Action is due next, i.e. prior Actions have been completed.
- **Records In or Due** - Displays all records that are currently in either the Records In or the Records Due tray.
- **Offline Records** - Displays records with electronic attachments that you have checked out to Offline Records.
- **Email Links** - Displays your email links between email inbox folders and container records.



Trays (Continued)

- **Activities Due** - Displays all due Workflow Activities in which you as the current user are the Assignee.
- **Documents Checked Out** - Displays the electronic documents you have checked out.
- **Scheduled Tasks Due** - Displays all records with a Category attached that has a scheduled task that is due and assigned to you.
Appears only when the Scheduled Tasks function is active.
- **To Do Items** - Your tasks.
You can add or remove items in your To Do Items tray.
- **User Labels** - Displays the user labels you have access to.
Double-click a label to see the records with that label.
- **Meetings** - All meetings you are involved in.