



WYOMING STATE
ARCHIVES

WYOMING DIGITAL ARCHIVES

Wyoming Digital Archives Remote Server User Manual

Wyoming State Archives
Barrett Building • 2301 Central Avenue
Cheyenne, WY 82002
Cindy Brown, Digital Archivist
Carmen Clayton, Records Management Supervisor
Phone 307.777.7036, 307.777.5586 • Fax 307.777.7044
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Introduction

(A note about terminology: Some of the terms in the software and this manual are used differently than commonly expected. Please see the [Glossary](#) for clarification.)

Wyoming Digital Archives General Facts

The Digital Archives is a secure repository where State and Local Government Agencies can store, manage, and access electronic records with long-term or permanent value. The Digital Archives uses the software **HPE Content Manager** to provide agencies a way to preserve and manage their electronic records in much the same way the State Records Center does for State Agency paper records, or the security microfilm vault does for Local Government Agencies. The State Archives works with participating agencies to provide training on the software and to set up the digital archiving process in the most efficient way possible.

Benefits/features

- Access: The Digital Archives software has robust search and retrieval capabilities. Staff can access agency records at their desks using the wyo-portal with the remote server connection. If desired, Agencies can make records available to the public through the web drawer.
- Security: The Digital Archives has over 100 security level settings. This allows users to restrict access to records to their own agency or just one person, if necessary.
- Records Management: The Digital Archives allows an agency to apply retention schedules to its electronic records to ensure that they are managed properly. This mirrors the process currently in place for State Agency paper records.

Storage and backup

- Records in the Digital Archives are stored and backed up daily, weekly, monthly on servers administered by ETS (the State Agency IT Department); with one set of the backups stored in the Pacific Northwest.

Storage costs

- The Digital Archives uses StorSimple storage. Currently this type of storage costs \$0.10/GB/month. Agencies are responsible to pay for the storage space its records require.

Software costs

- The Archives has purchased a number of software licenses for use by State and Local Agencies. The Archives can generally provide one license to each Local Agency and the Archives will pay the corresponding annual license maintenance fee for the licenses.
- If an agency requires more licenses than the Archives can provide, it will need to purchase them and pay the corresponding annual maintenance fees.

Record scanning

- The State Archives has drafted [*Guidelines for the Creation and Preservation of Digital Files*](#).

Getting Started

The Wyoming State Archives assists the agencies in developing a strategy for using the Digital Archives. Here is a brief outline of the preliminary steps required to begin a project in the Digital Archives.

Licenses

The licenses are assigned to named users. The State Archives generally has one license available to each Local Government Agency. If needed, the agency can purchase additional licenses and pay the annual maintenance fees. The agency provides the user's name and contact information.


User Types ([see appendix for more details](#))

There are six types of user licenses, with varying levels of capabilities. The licenses range from Inquiry Users who can only conduct searches and make copies, to Records Coordinators who can perform advanced work such as editing data entry forms and moving documents between folders.

Access

The State Archives will ask ETS to create log-in credentials for the agency user. ETS will send the user name and password, with a Token (QR code) to the user for logging into the wyo-portal.

Before attempting to log into the wyo-portal, the user will need to load the Google Authenticator application on their web browser (preferably Google Chrome) to activate the Token (QR code) ([see appendix for more details](#)).

After successfully logging into the wyo-portal ([see appendix for more details](#)), the user will log into the Digital Archives by using a rdp (remote desktop connection) link  sent by the State Archives ([see appendix for more details](#)).

The user's password will need to be reset **once a month**. The easiest option would be to call ETS' Help Desk and ask them to reset it. The phone number is (307) 777-5000. Otherwise, ([see appendix](#)) for unofficial password reset instructions.

Metadata (Data Entry Form)

The State Archives will create a sample data entry form in the QA (testing) dataset, which will be revised and edited as needed. The fields used in the form can be used to search or sort the electronic records.

Security Access

The State Archives will work with the agency to assign the security level to the records. The security levels will be customized for each agency.

Testing

The State Archives will provide preliminary training, using a conference call system if needed- allowing the State Archives staff to view the user's computer screen and guide the agency through the initial settings. The agency will add some sample records to make sure they are comfortable using the software and that the data entry form includes the required fields.

Next Steps

When the agency is ready, the State Archives will transfer the licenses and data entry form to the Production dataset.

If it hasn't already been created, the State Archives will work with the agency and ETS to set up a Data Sharing Agreement, which formalizes each group's responsibilities.

Default Settings

Some default settings can be selected when first working in the Digital Archives. They help streamline the process for archiving the digital records and conducting records searches. The following screen shots with detailed instructions are included at the back of the manual:

Adding a Dataset: Since the Digital Archives has three datasets (databases); often the default dataset must be selected or edited for new users ([see appendix for more details](#)).

Default Drag & Drop Settings: If the same type of record (Record Type) is used consistently, a default document type can be selected to eliminate a prompt/message for each document archived ([see appendix for more details](#)).

Search Defaults: There are some folders and documents in the Digital Archives which are open (unrestricted) records. Unless the search default is selected, searches could bring up extraneous records ([see appendix for more details](#)).


Adding/Editing Column Headings: The columns which appear on the search screen can be edited, to include the specific fields used in an agency's data entry form ([see appendix for more details](#)).

Custom Screen Colors: The background color for the Digital Archives screen can be changed from shades of gray to a wide variety of colors ([see appendix for more details](#)).

Creating Folders & Adding Documents

The Digital Archives offers the agencies a couple of easy solutions for creating folders and archiving documents. The agency workflow helps determine which approach works best. State Archives staff can provide guidance and information concerning the alternatives.

NEW FOLDERS: There are three methods which can be used to create new folders. The agency can use the first two methods:

Creating a New Folder: Using the  icon on the Home screen, ([see appendix for more details](#)).

Copying & Editing an Existing Folder: Copying an existing record and editing it ([see appendix for more details](#)).

Importing a Group of Folders: State Archives staff importing (automatically generating) the folders from an agency provided spreadsheet with the folder names and data entry info. If the agency has a spreadsheet with entries showing the folder names and any other pertinent data entry fields, the State Archives staff can use a tool to automatically create (import) empty folders.

Creating Sub-Folders: (Some agencies choose to use Sub-Folders in addition to Folders) The Sub-Folders can be created and nested within Folders. In some cases, the system can also be set to automatically create Sub-folders. Sub-Folders can be manually created as needed ([see appendix for more details](#)).

ADDING DOCUMENTS: The remote server users **require** a document queue to add documents to the Digital Archives. After the documents have been archived, they can be moved into folders/sub-folders/etc.

Adding Documents - Document Queues: A Document Queue folder can be set up on the agency computer with a linked queue folder created in the Digital Archives. Any records added to the agency computer queue folder will be "processed" and placed in the Digital Archives. Unless the user wants to select the Record Type individually for each document added, the Drag & Drop

Default Setting is recommended ([see section above](#)). If there is more than one record dropped into the Digital Archives, once the record type is determined a Document Queue will appear in the software. The records will need to be "checked in" ([see appendix for more details](#)).

Moving Documents into Folders: After the Document Queue has been processed; the documents can be easily tagged and moved into the pertinent folder ([see appendix for more details](#)).

Searching, Viewing and Copying

Searching and copying records in the Digital Archives can be limited by the security level assigned to the user and the record. Both searching and copying tasks are customizable depending on the agency's need. Training videos have been recorded regarding searching for records and "supercopying" them. The videos are linked to our website at:

<http://wyoarchives.state.wy.us/index.php/wyoming-digital-archives>.

Searching: The Digital Archives has powerful search capabilities, allowing the agency to search for folders or documents recently added, to search by the date a record was added or created in the system, by the name of the user who added the record, by any information included in the data entry form, or by Record Type, etc. Simple (one search criteria) searches can be requested ([see appendix for more details](#)), as well as complex (refined) searches ([see advanced user appendix for more details](#)).

Viewing: Documents added to the Digital Archives can be quickly previewed. They can also be opened using in the document's original software. If the software is unavailable, the document will be opened using the Digital Archives' viewer. ([see appendix for more details](#))

Copying: The user can copy documents out of the Digital Archives, by "supercopying," them; where the user selects a computer folder to place the copies. ([see appendix for more details](#)).

If the agency requires copies of a large number of documents, the Archives staff can also assist by exporting the digital copies.

APPENDICES:

- 2.1. a [Types of Users](#)
- 2.1. b [Logging into the Digital Archives Remote Server](#)
- 2.1. c [Resetting User Password](#)

- 2.2. a [Adding a Dataset to the Digital Archives Opening Screen](#)
- 2.2. b [Default Drag and Drop Settings](#)
- 2.2. c [Search Defaults](#)
- 2.2. d [Changing Column Headings](#)
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- 3.1 [Creating New Folders - Adding New Folders](#)
- 3.2 [Creating New Folders - Copying Folders](#)
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- 3.4 [Adding Documents - Document Queues](#)

- 4.1 [Searching for Documents/Containers](#)
- 4.2 [Viewing Documents](#)
- 4.3 [Copying Documents](#)

Types of Users

LIST OF DIGITAL ARCHIVES USER LICENSE TYPES (The State Archives staff will assist in determining the type of license required):

Administrator/Records Manager (Wyoming State Archives Staff):

- Core records management team
- Configure the system
- Set up the policies
- Administer the control data, such as protective markings, retention schedules, classifications etc.
- Mainly use the HP Desktop Client

Records Coordinator (Power Users):

- Search/copy records
- Create records
- Modify records
- Create new parts
- Append to existing notes
- Set container
- Change container
- Remove from containers
- Close a container

Knowledge Worker (cannot modify records or close a container):

- Search/copy records
- Create Records
- Append to existing notes
- Set container
- Change container
- Remove from container

Contributor (primarily used for integrations with other ECM systems, such as WorkSite or MS SharePoint):

- Search/copy records
- Create Records
- Set Container
- Inquiry User:
- Search/copy records

Inquiry (cannot add/modify records):

- Search/copy records

TABLE SHOWING PERMISSIONS GRANTED TO EACH USER TYPE

Permission	Administrator	Records Manager	Records Coordinator	Knowledge Worker	Contributor	Inquiry User
Create Records	Yes	Yes	Yes	Yes	Yes	No
Modify Records	Yes	Yes	Yes	No	No	No
Delete Records	Yes	Yes	No	No	No	No
Reverse Final Declaration	Yes	Yes	No	No	No	No
Create New Parts	Yes	Yes	Yes	No	No	No

Permission	Administrator	Records Manager	Records Coordinator	Knowledge Worker	Contributor	Inquiry User
Reclass Corporate and Vital Records	Yes	Yes	No	No	No	No
Process Requests	Yes	Yes	Yes	No	No	No
Administer Requests and Storage Provider Locations	Yes	Yes	No	No	No	No
Make Requests	Yes	Yes	Yes	Yes	Yes	No
Record Administration	Yes	Yes	No	No	No	No
Record Administration (Restricted)	Yes	No	No	No	No	No
Record Archivist	Yes	Yes	No	No	No	No
Document Update	Yes	Yes	Yes	Yes	No	No
Document Delete	Yes	Yes	Yes	No	No	No
Append to Existing Notes	Yes	Yes	Yes	Yes	No	No
Add Records Relationships	Yes	Yes	Yes	Yes	Yes	No
Remove Records Relationships	Yes	Yes	Yes	Yes	No	No
Attach Contacts	Yes	Yes	Yes	Yes	Yes	No
Remove Contacts	Yes	Yes	Yes	Yes	No	No
Set Container	Yes	Yes	Yes	Yes	Yes	No
Change Container	Yes	Yes	Yes	Yes	No	No
Remove from Container	Yes	Yes	Yes	Yes	No	No
Close a Container	Yes	Yes	Yes	No	No	No
Modify Record Security	Yes	Yes	Yes	No	No	No
Set Record Archiving Dates	Yes	Yes	Yes	No	No	No

Permission	Administrator	Records Manager	Records Coordinator	Knowledge Worker	Contributor	Inquiry User
Create Communications	Yes	Yes	Yes	Yes	No	No
Manage Communications	Yes	Yes	No	No	No	No
Remove Previous Revisions	Yes	Yes	Yes	No	No	No
Remove Renditions	Yes	Yes	Yes	No	No	No
Approve Record Disposal	Yes	Yes	Yes	No	No	No

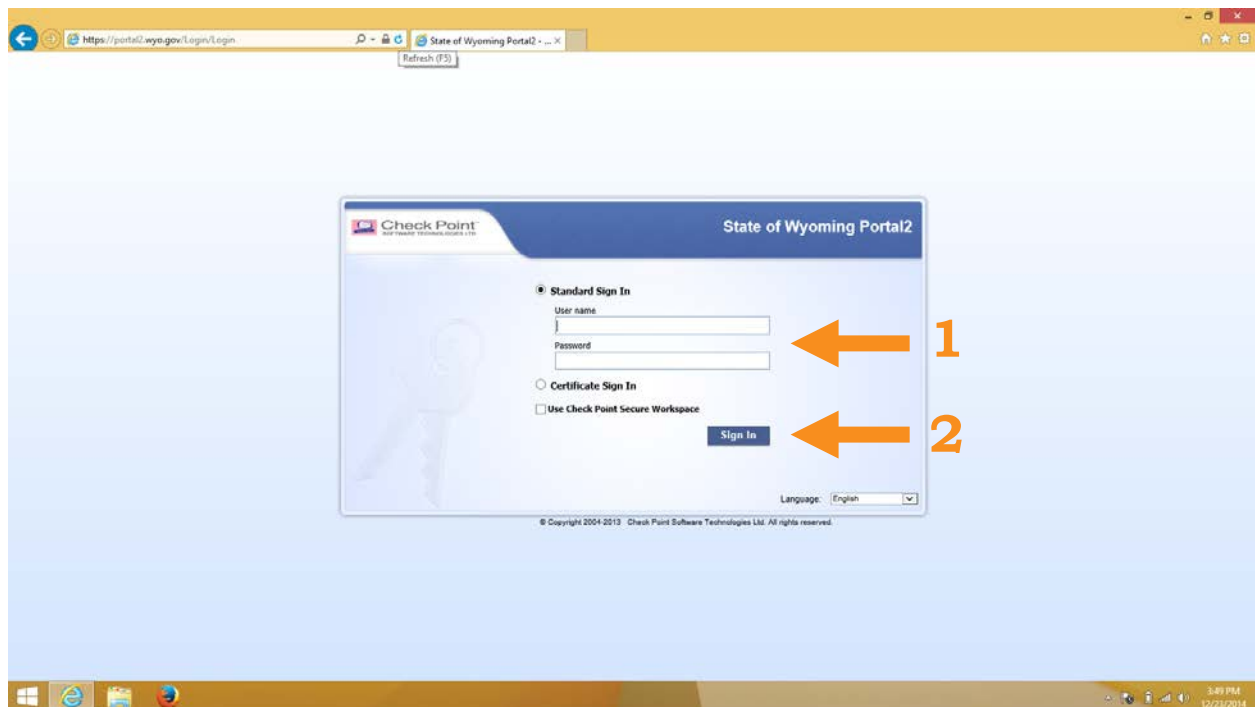
Logging into the Remote User Server

Note: Logging into the Remote User Server for the **first time** requires more steps ([see instructions below](#))

Using an internet browser, open <https://portal2.wyo.gov>

The State of Wyoming Portal2 screen will appear:

- Login with the user name and password provided by ETS.
(Note: *wyo*/does not need to be added to the user name - just the user name)
- Select **SIGN-IN**.



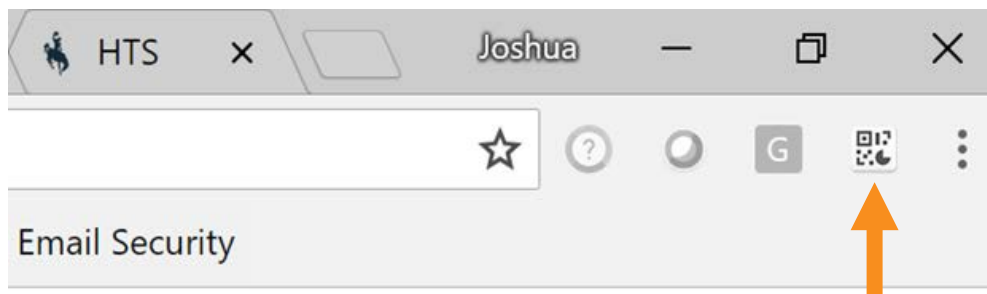
The **MESSAGE CHALLENGE** screen will appear. It is requiring the code from the Authenticator app.



To obtain a code:

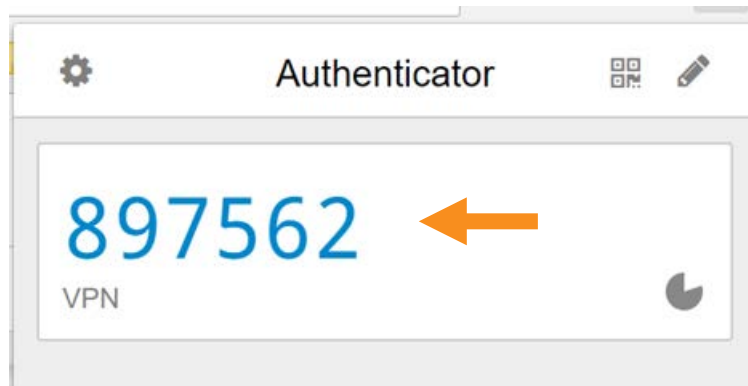
- Open **CHROME**.

- Click on the **AUTHENTICATOR ICON** , (near the upper right-hand corner of the browser).



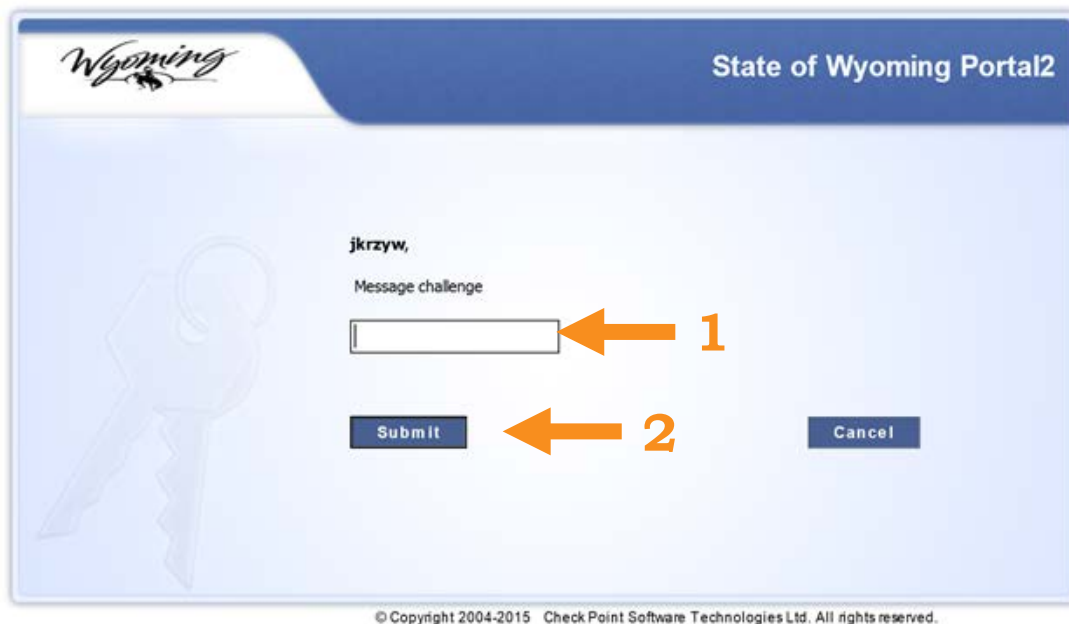
The **CODE SCREEN** will appear:

- Click on the code to copy it.



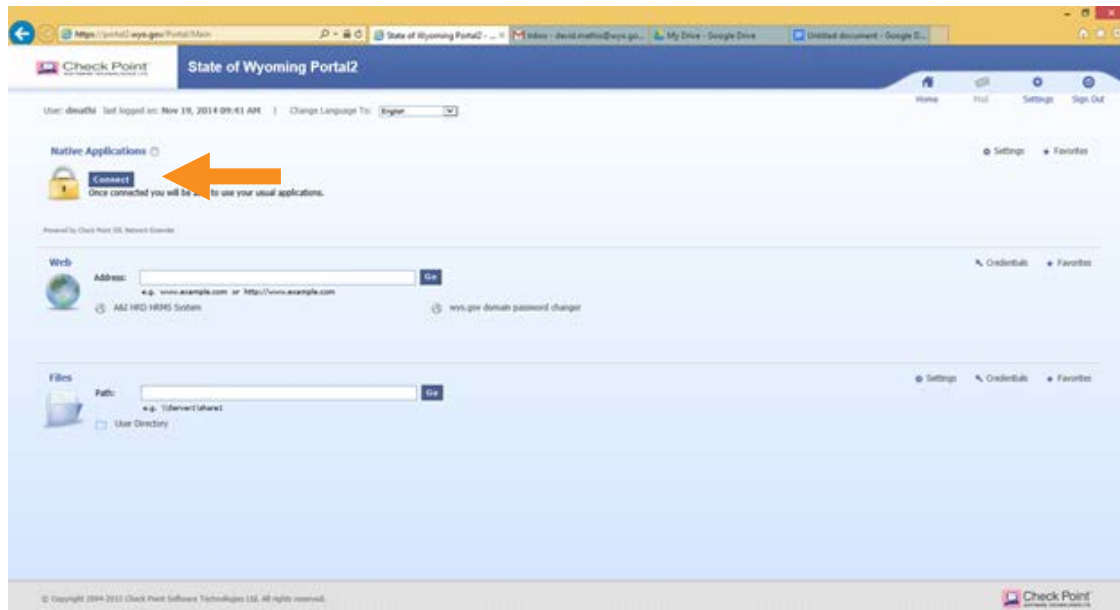
Return to the **MESSAGE CHALLENGE** screen:

- Paste the **AUTHENTICATOR CODE** into the message challenge box.
- Select **SUBMIT**.

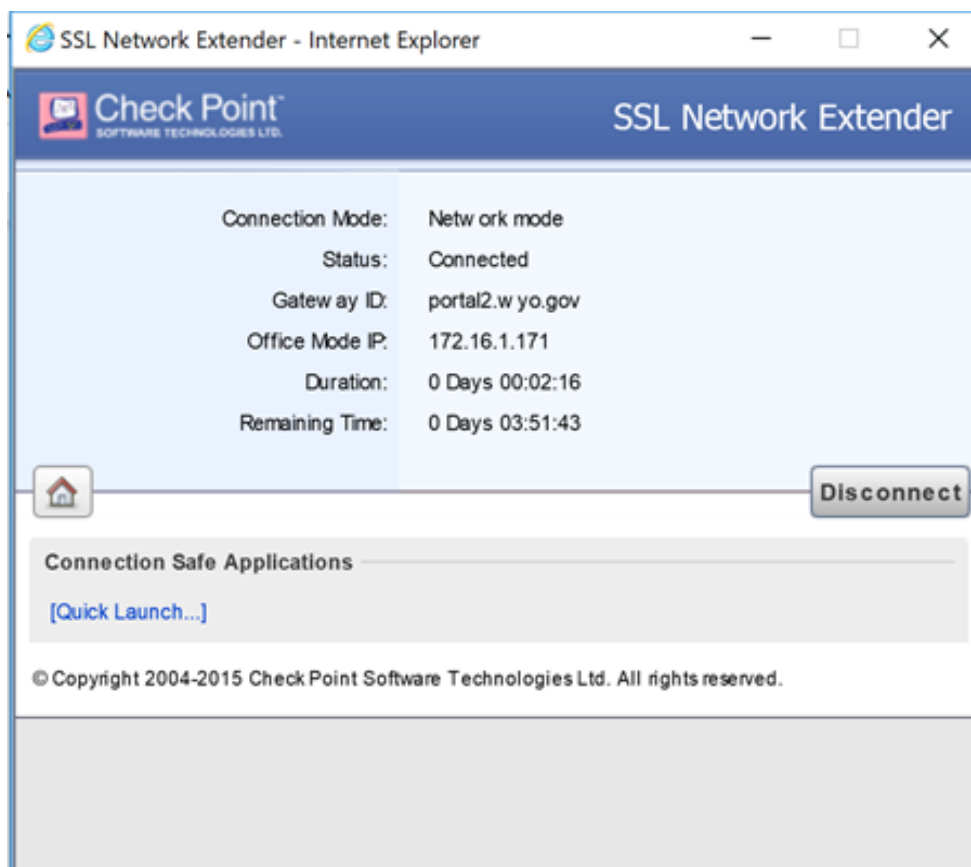


The **WYO-PORTAL** screen will appear:


- Select **CONNECT**.

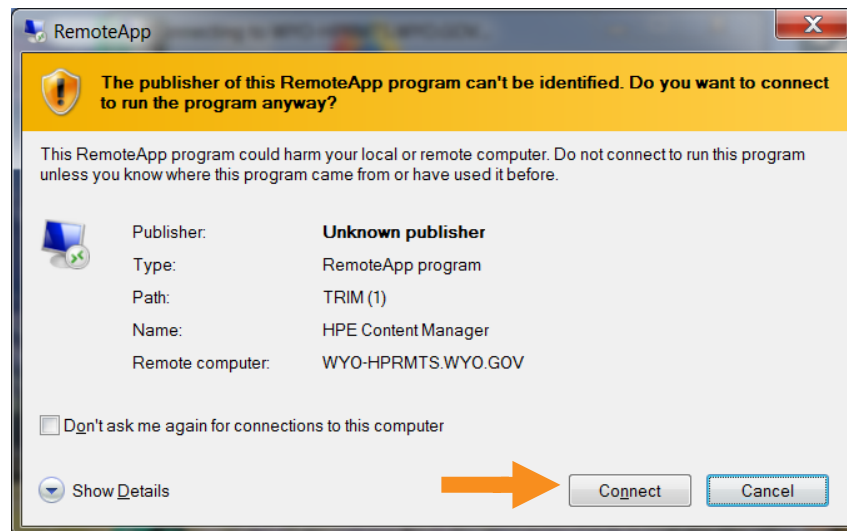


The **SSL NETWORK EXTENDER** screen will appear:



The user is logged into the wyo-portal. To access the Digital Archives:

- Double-click on the **RDP LINK** , called **HPE CONTENT MANAGER**
- The **REMOTE APP** publisher screen may appear:
- Click **CONNECT**.



Then **WINDOWS SECURITY SCREEN** will appear. The user name field should be auto-filled, from prior use:

- Enter the assigned **PASSWORD**.
- Click **OK**.




The user is now logged into the Digital Archives.

Resetting User's Password

The user's password will need to be reset once a month. The easiest option is to call ETS' Help Desk (307-777-5000) and ask them to reset the password. Otherwise, here are some unofficial instructions explaining how the user can reset the password

In a web browser open: tps.wyo.gov The **PASSWORD SERVER LOGIN SCREEN** will appear:

- Log in with **USER NAME** and **PASSWORD**



The Password Server

Wyo.Gov Active Directory Self-Service

Update Your Profile Efficiently :

[User Registration](#)
Establish your identity via registration

[Self Update](#)
Update your contact information

[Change Password](#)
Change your password using current password


Sign in


User Name: martin.mcfly

Password:

Log on to: WYO

Login

**Reset Password**
Reset your forgotten password

**Unlock Account**
Unlock your locked out account

The **ENROLL** screen will appear:

- Select **CLICK HERE** to enroll



The SELF UPDATE screen will appear:

- Add **ANY INFO** that is missing

Self Update
Update your personal information, such as contact details, in this page.

Group1

Display Name :

E-mail :

Logon name : Martin.McFly

First name :

Last name :

Desk Phone :

Mobile Phone :

[Update](#)

If it is the first time the website has been accessed, the USER REGISTRATION screen will appear:

- Complete the fields as needed
- Select **ENROLL**

Welcome, Martin.McFly
[Sign Out](#) [Personalize](#)

My Info Change Password **Enrollment**

User Registration
The information you provide here will be used to authenticate you when you attempt to reset your password or unlock your account.

Verification Code Google Authenticator

Register Your Mobile Number(s)

+307 630 5555 +

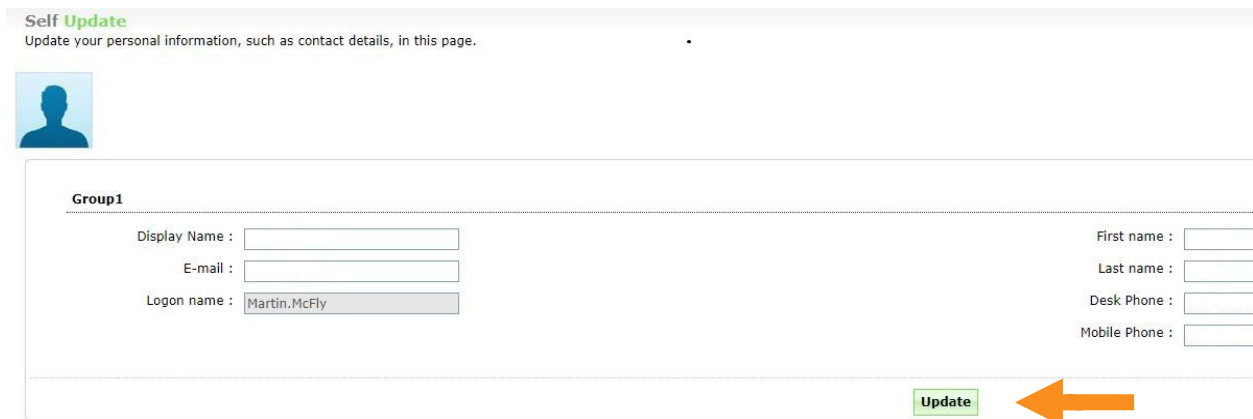
Register Your Email Address(es)

martin.mcfly@wyo.gov +

[Enroll](#)

The **SELF UPDATE** screen will reappear:

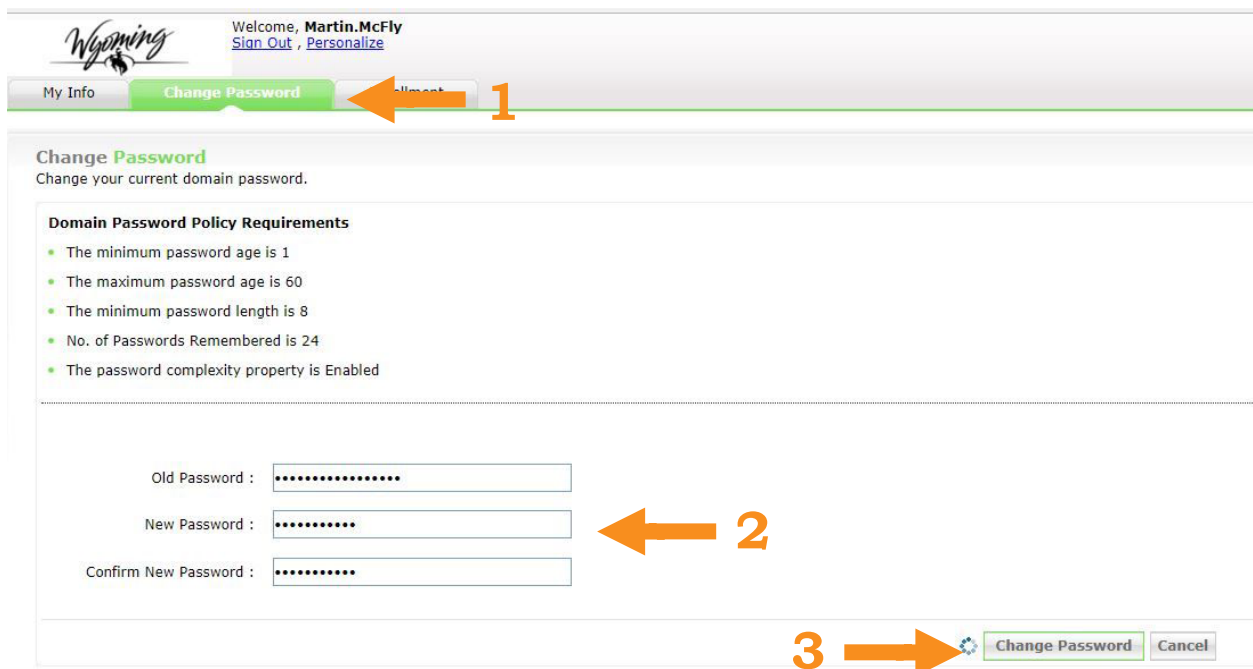
- Verify that the **INFORMATION** on the screen is correct
- Select **UPDATE**



The 'Self Update' screen displays a header with the title 'Self Update' and a subtitle 'Update your personal information, such as contact details, in this page.' Below the header is a blue silhouette icon representing a user. The main content area is titled 'Group1' and contains several input fields: 'Display Name', 'E-mail', 'Ligon name' (pre-filled with 'Martin.McFly'), 'First name', 'Last name', 'Desk Phone', and 'Mobile Phone'. An 'Update' button is located at the bottom right, with an orange arrow pointing to it.

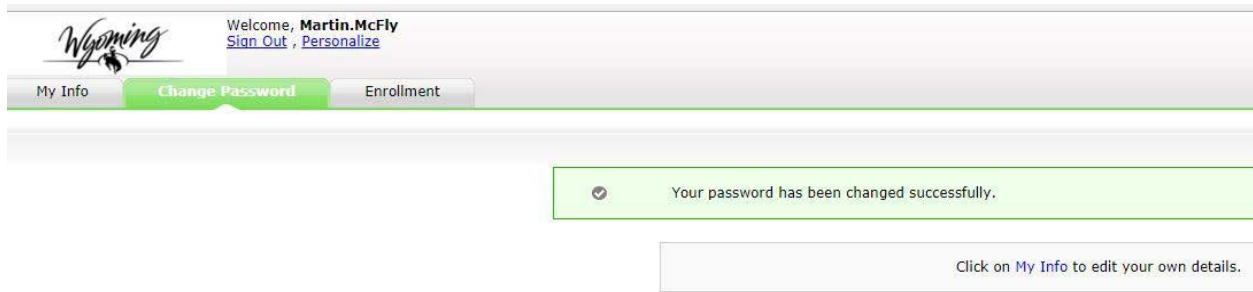
The **MAIN SCREEN** will appear

- Select the **CHANGE PASSWORD** tab
- Enter the **OLD PASSWORD** and **NEW PASSWORD**
- Select **CHANGE PASSWORD**



The 'Change Password' screen features a header with the Wyoming logo, a welcome message for 'Martin.McFly', and links for 'Sign Out' and 'Personalize'. Below the header is a navigation bar with tabs: 'My Info', 'Change Password' (highlighted with an orange arrow and the number 1), and 'My Account'. The main content area is titled 'Change Password' and includes a section for 'Domain Password Policy Requirements' with a bulleted list of rules. Below this are three input fields: 'Old Password', 'New Password', and 'Confirm New Password', each with an orange arrow pointing to it and the number 2. At the bottom right, there is a 'Change Password' button (with an orange arrow and the number 3) and a 'Cancel' button.

A prompt screen will appear verifying that the password has been changed successfully:



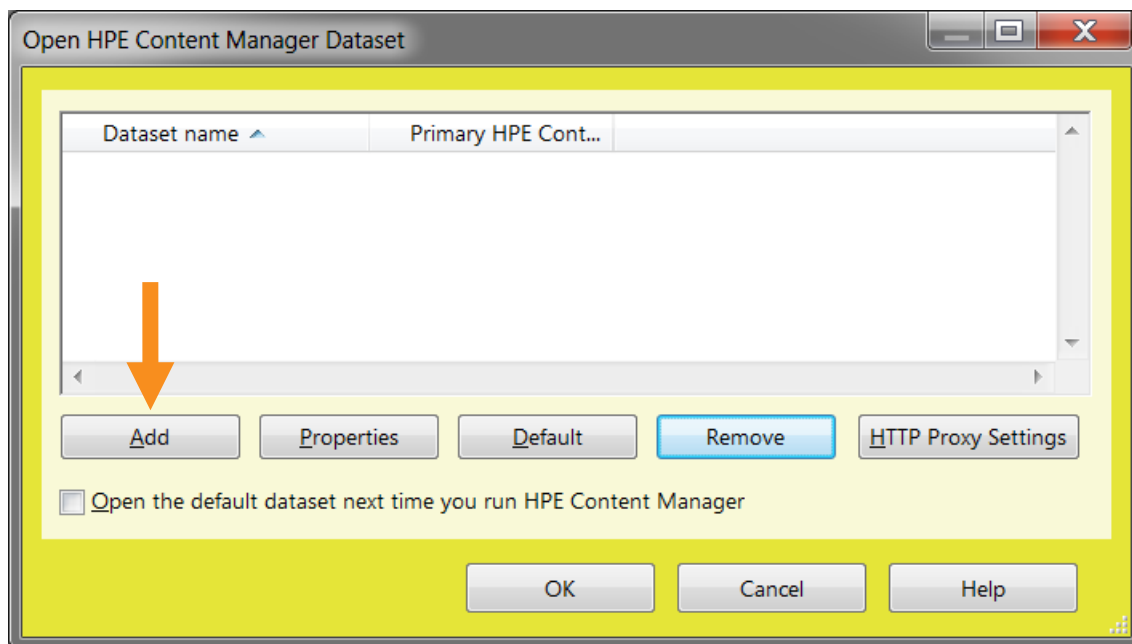
Adding a Dataset to the Digital Archives Opening Screen

Since the Digital Archives has three datasets (databases), often the dataset must be selected or edited for new users.



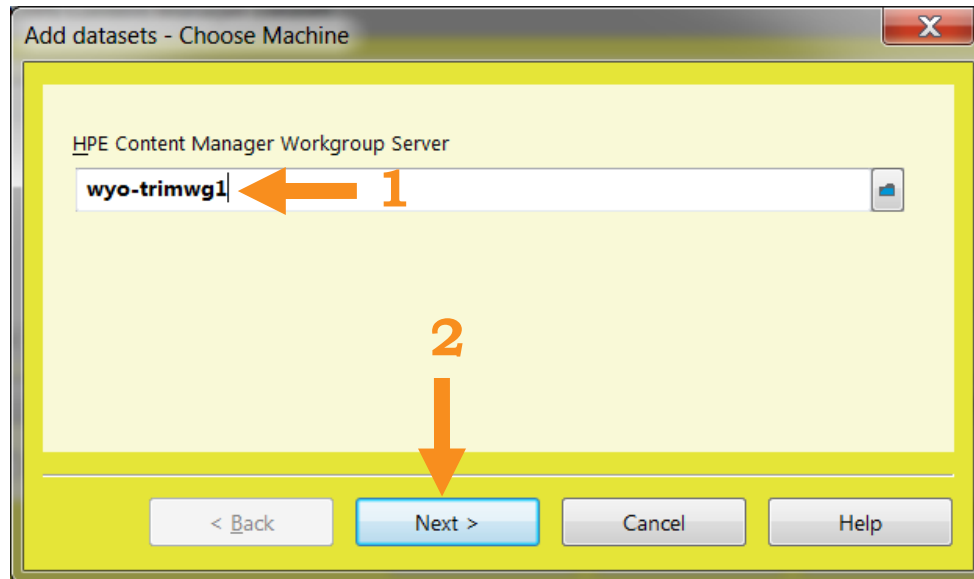
When Double-Clicking on the HPE Content Manager icon, the **OPEN HPE CONTENT MANAGER DATASET** screen below may appear. To add the **Production** Dataset:

- Select **ADD**.



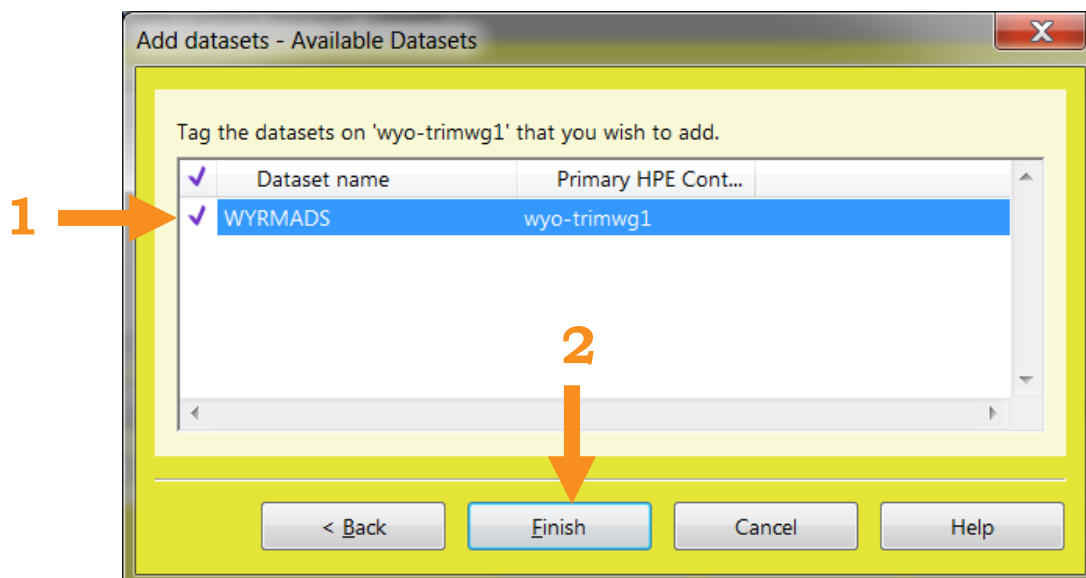
In the **ADD DATASETS - CHOOSE MACHINE** screen:

- Type **wyo-trimwg1** in the **HP RECORDS MANAGER WORKGROUP SERVER** box
(Note: the QA dataset/training dataset is: wyo-trimwg3 and the DevDS dataset is: wyo-trimwg4).
- Select **NEXT**.



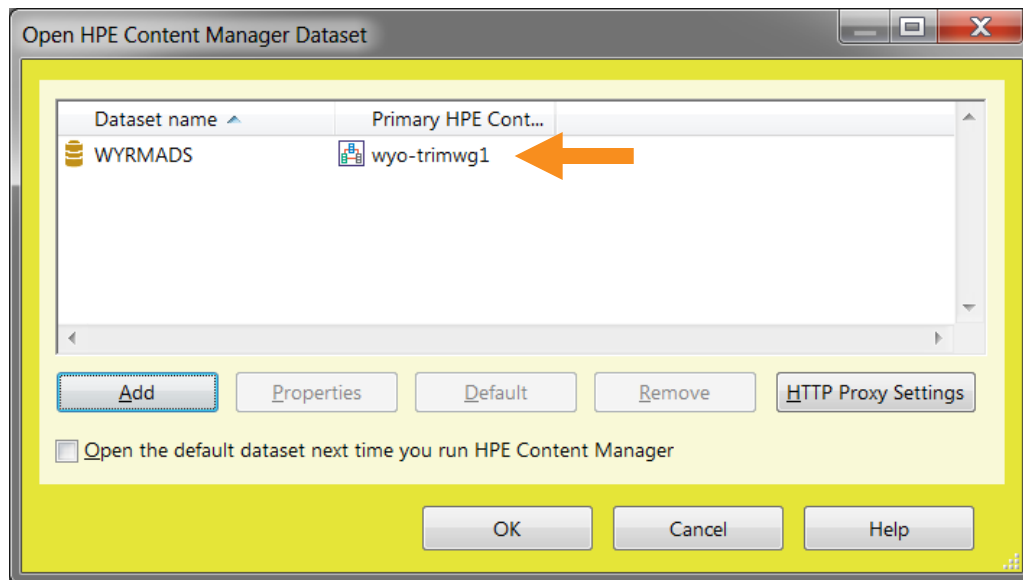
In the **ADD DATASETS - AVAILABLE DATASETS** screen:

- Click to the **RIGHT** of the **DATASET NAME** (WYRMADS). A ✓ should appear beside the Dataset name.
- Select **FINISH**.



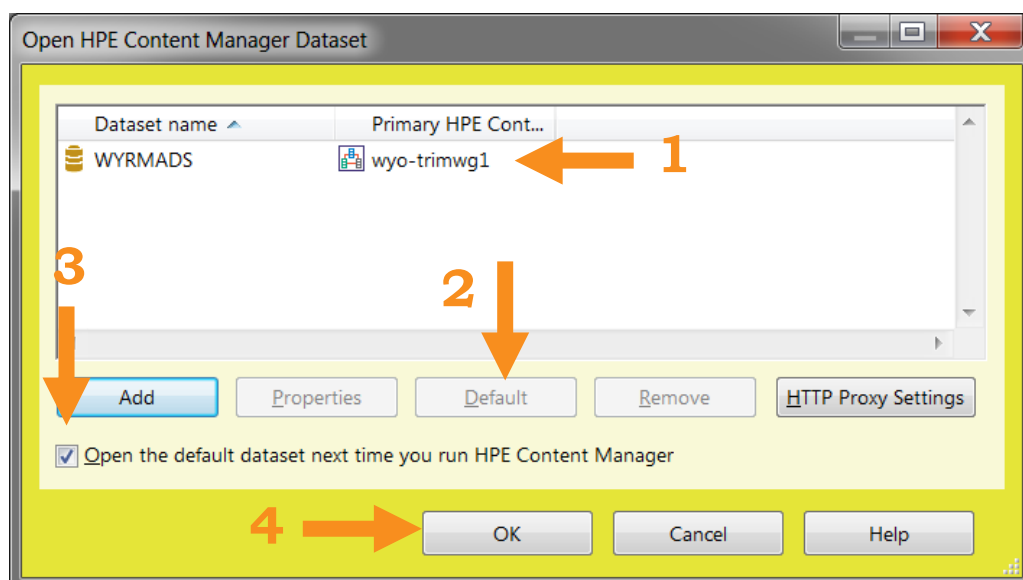
In the **OPEN HPE CONTENT MANAGER DATASET** screen:

- The dataset will now appear on the list.



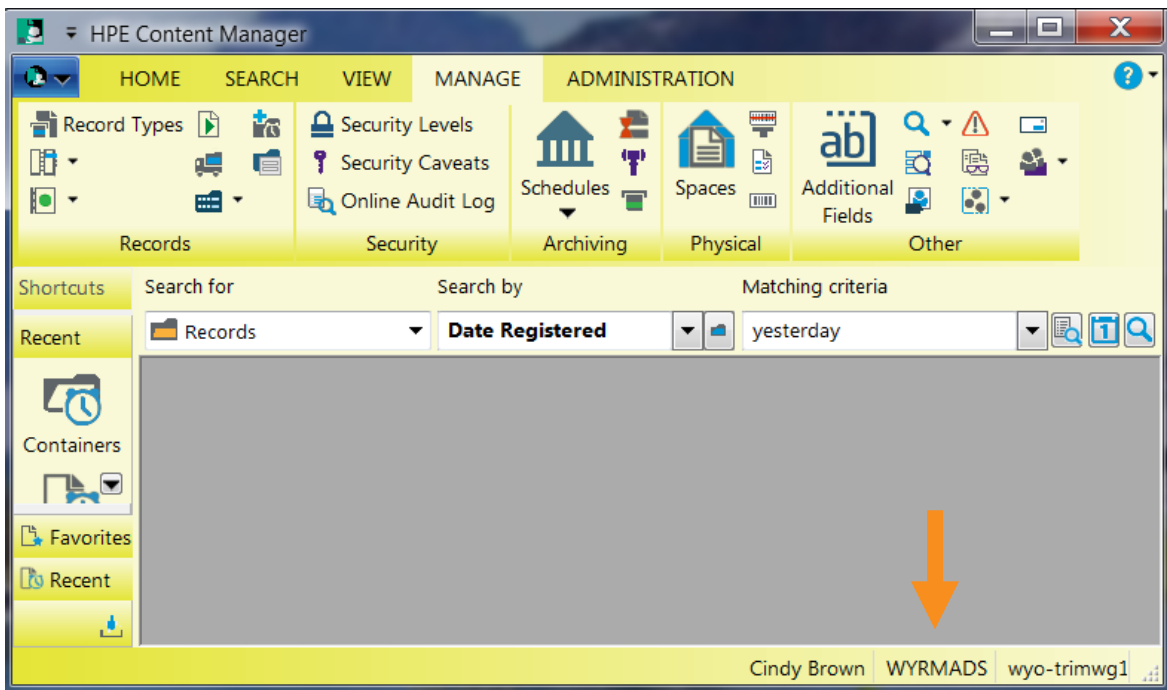
To select **WYRMADS** as the Default dataset:

- Highlight/Select the dataset name **WYRMADS**.
- Select the **DEFAULT** button.
- Toggle/Check the box for **OPEN THE DEFAULT DATASET NEXT TIME YOU RUN HPE CONTENT MANAGER**.
- Click **OK**.



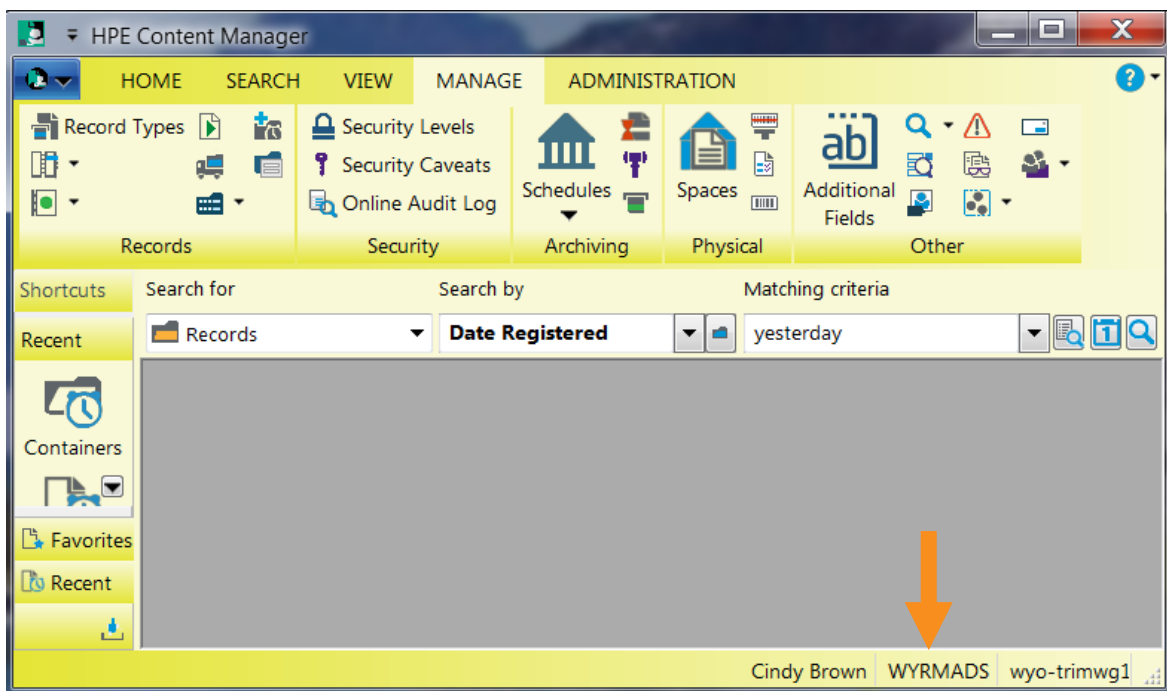
The Digital Archives (HPE Content Manager) will open:

- See the bottom right-hand corner of the screen to confirm which dataset is being accessed.

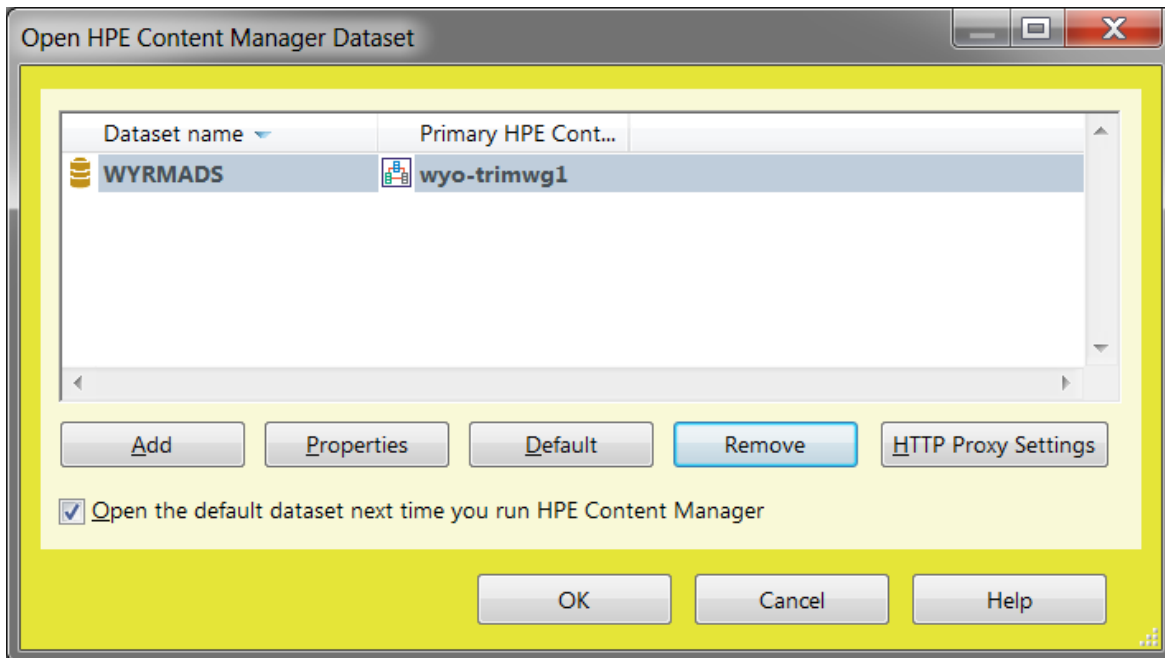


To access the **DATASET** screen again:

- Double-Click on **WYRMADS** (at the bottom right-hand corner of the screen).

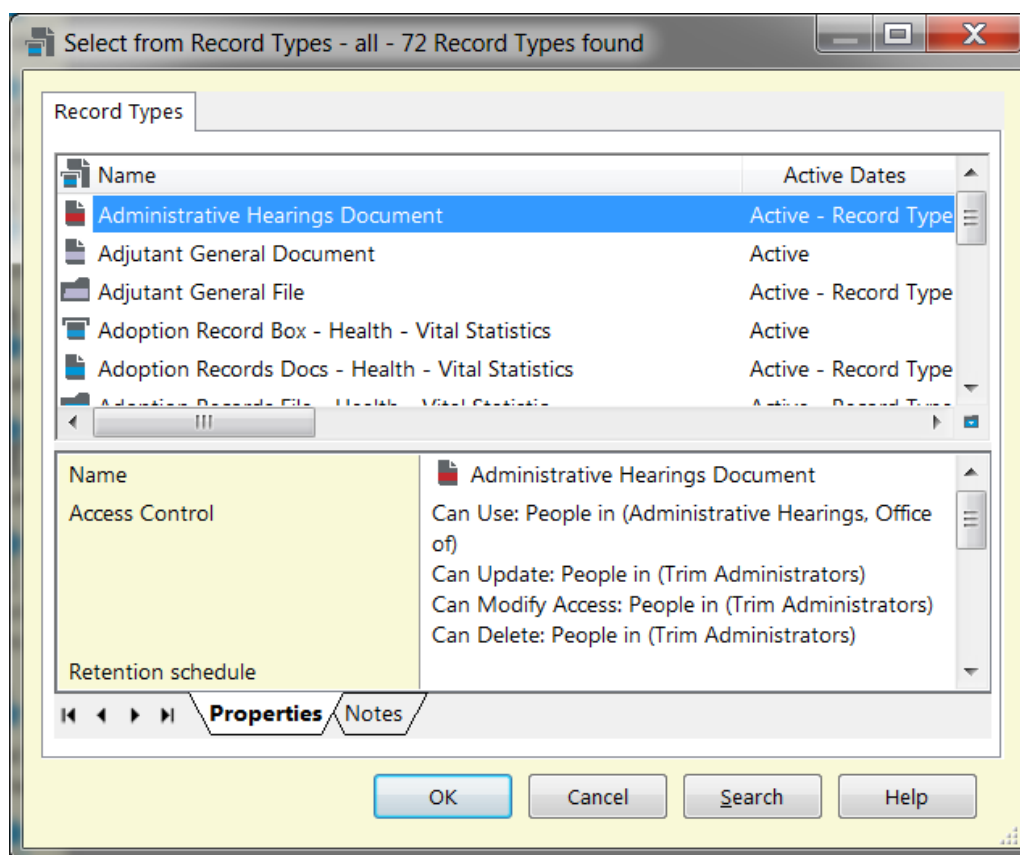


The **OPEN HPE CONTENT MANAGER DATASET** screen will reappear:



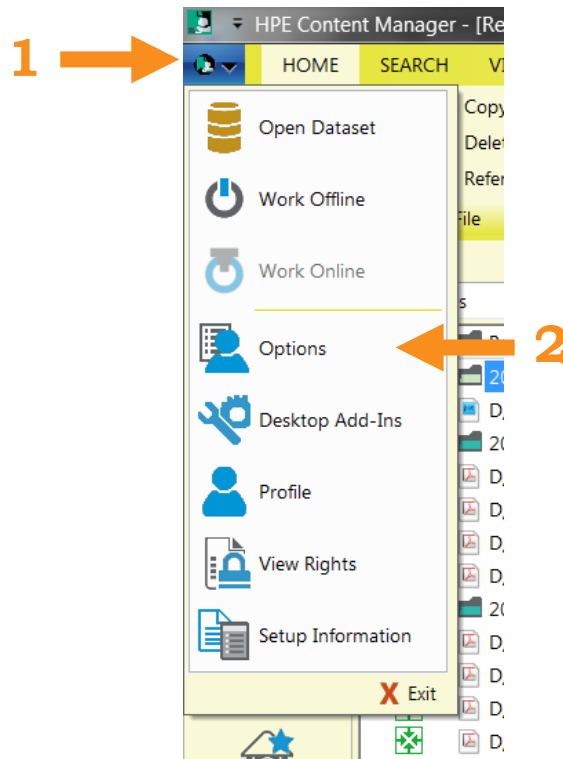
Default Drag and Drop Settings

Unless a default **Dropped File** record type is selected, the software will prompt the user to select a record type for **EACH** document added into the Digital Archives.



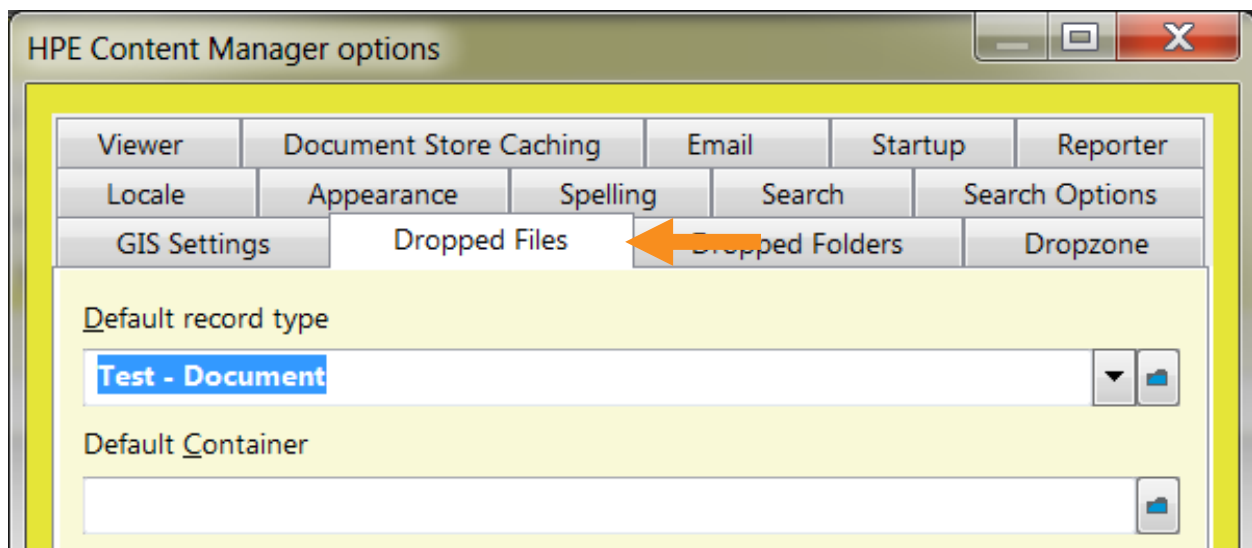
If all the documents being added are the same record type, a default setting could be used instead:


- Select the **FILE ICON**  near the top left hand corner of the Digital Archives screen.
- Click on **OPTIONS**.

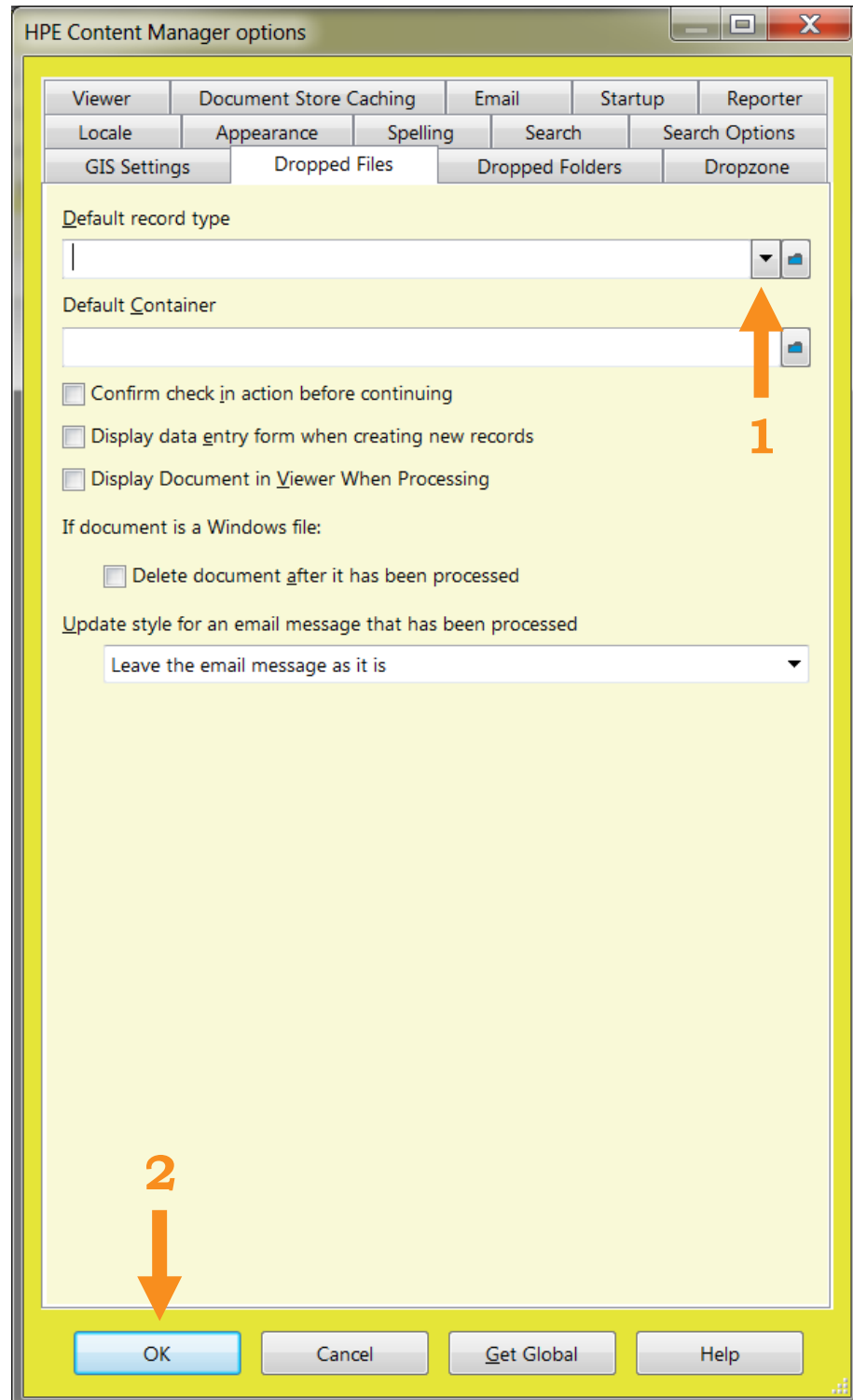


In the **HPE CONTENT MANAGER OPTIONS** screen:

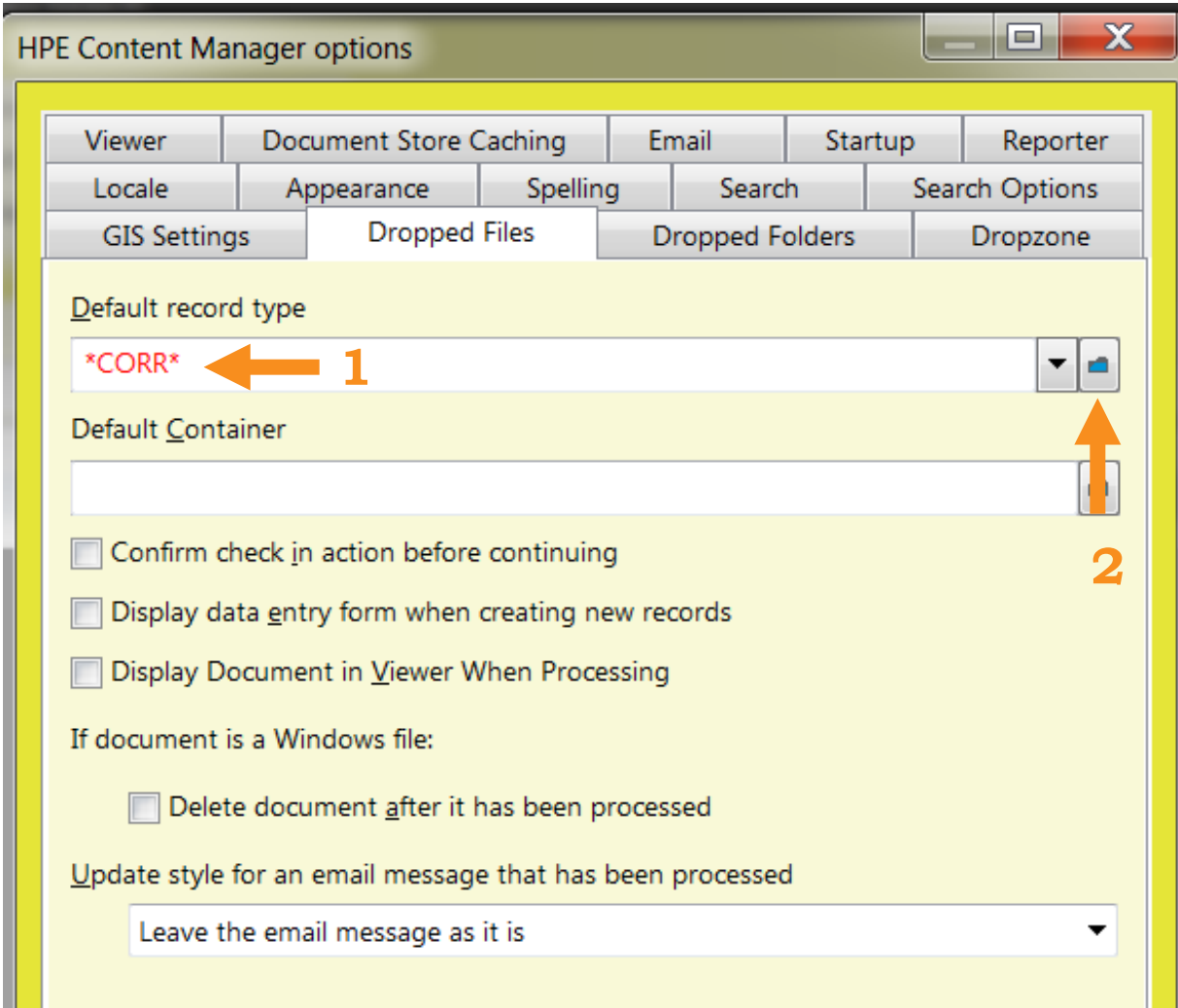
- Select the **DROPPED FILES** tab.



- If the **RECORD TYPE** has been selected **BEFORE**, just click the **DROP-DOWN ARROW** , and select the pertinent **RECORD TYPE** from the list.
- Click **OK**.






- Otherwise, type part of the **PERTINENT RECORD TYPE** name surrounded by *s (for example: ***CORR***) in **DEFAULT RECORD TYPE** field.
- To narrow down the options, click on the **BLUE FOLDER ICON** .



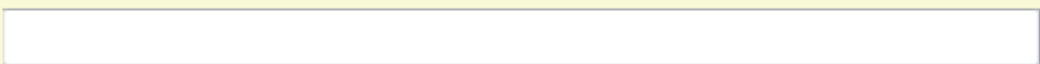


HPE Content Manager options

Viewer	Document Store Caching	Email	Startup	Reporter
Locale	Appearance	Spelling	Search	Search Options
GIS Settings	Dropped Files	Dropped Folders	Dropzone	

Default record type

CORR   

Default Container

☐ Confirm check in action before continuing


☐ Display data entry form when creating new records

☐ Display Document in Viewer When Processing

If document is a Windows file:

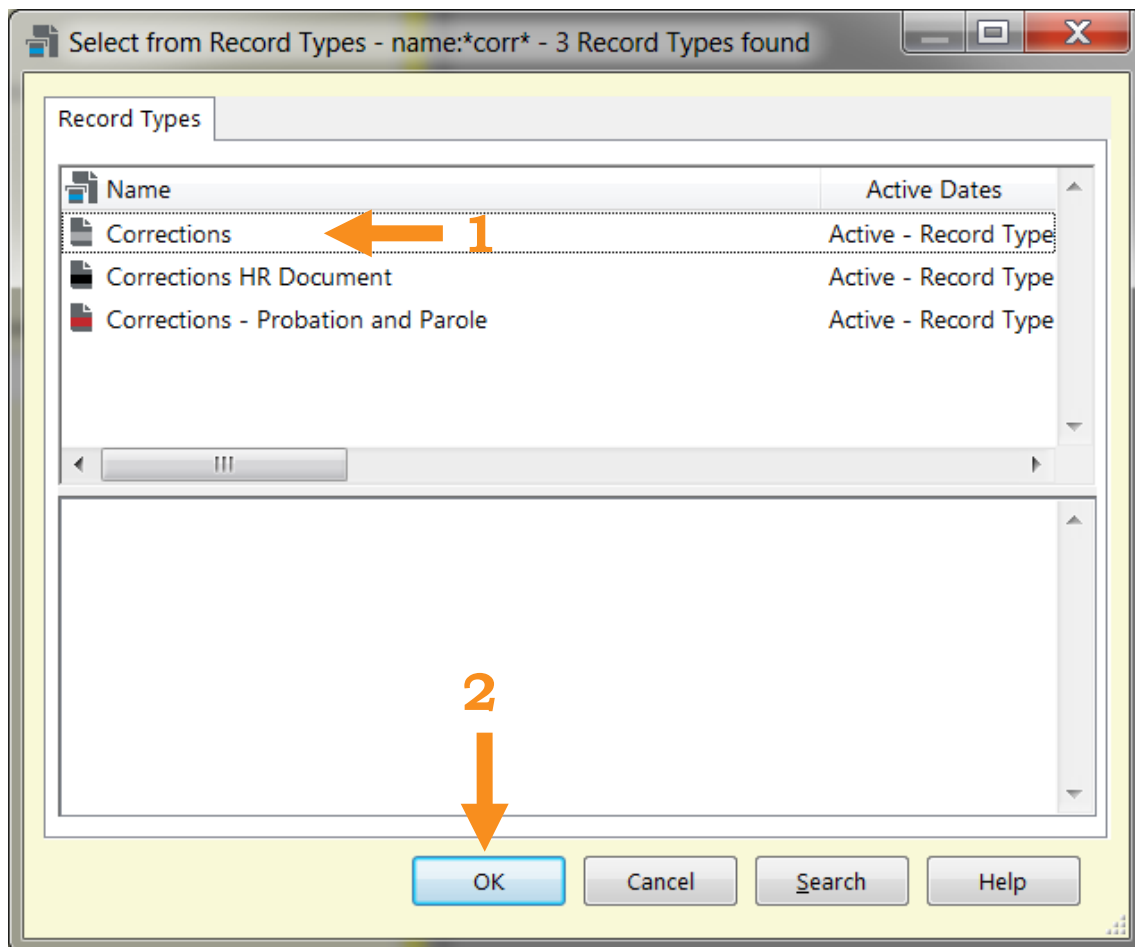
☐ Delete document after it has been processed

Update style for an email message that has been processed

Leave the email message as it is 

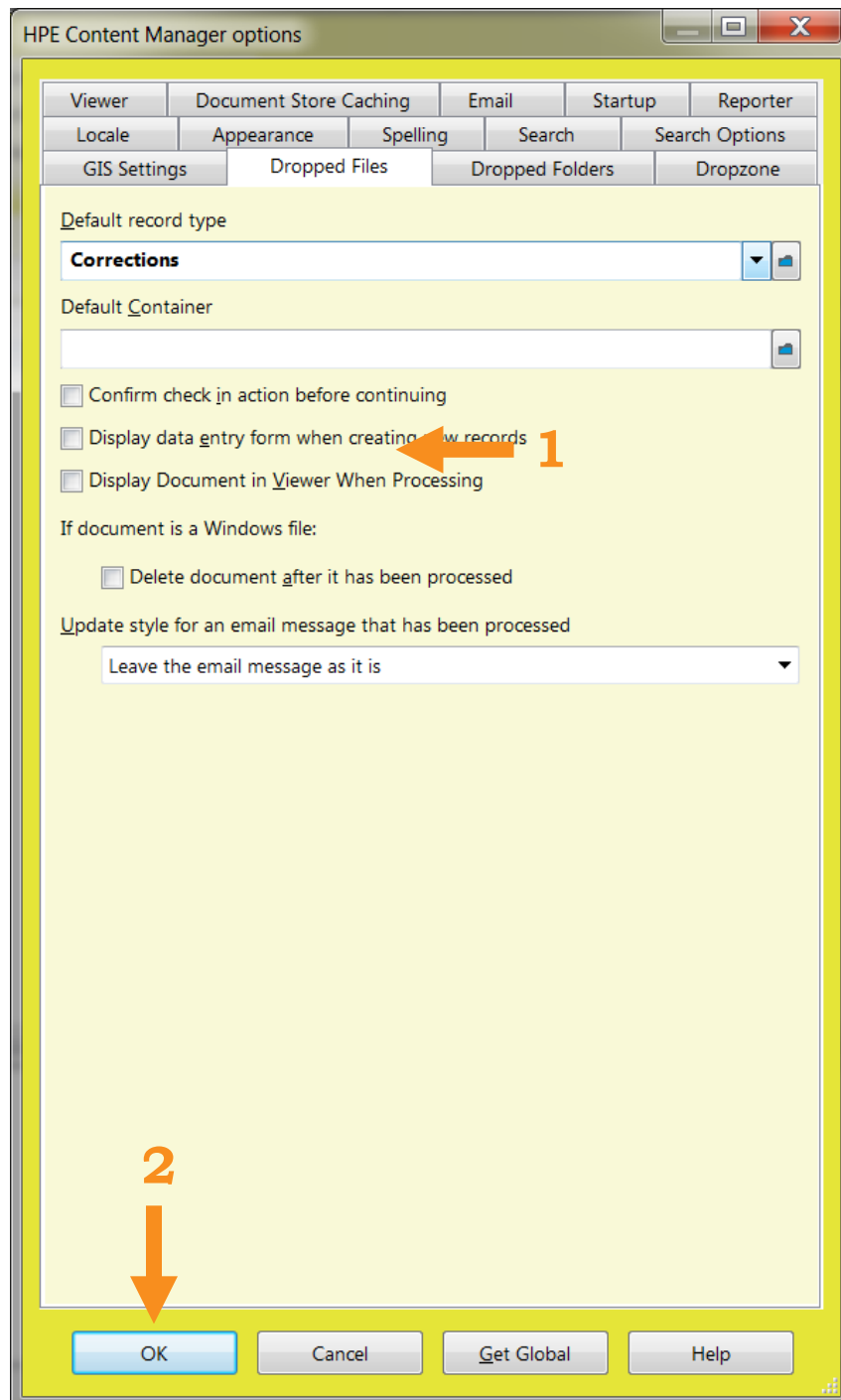
In the **SELECT FROM RECORD TYPES** screen:

- Select/Highlight the pertinent **RECORD TYPE** (for example: **CORRECTIONS** name line).
- Click **OK**.



The **HPE CONTENT MANAGER OPTIONS** screen will reappear

- Make sure that **NONE** of the boxes are toggled/checked.
- Click **OK**.

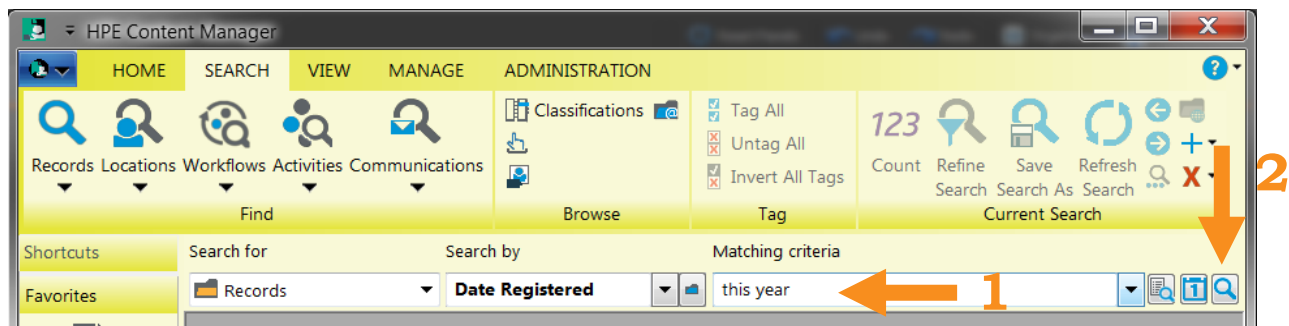


The **DRAG & DROP DEFAULT SETTING** has been selected. In this example it is: **CORRECTIONS DOCUMENT** (this saves some clicks/time).

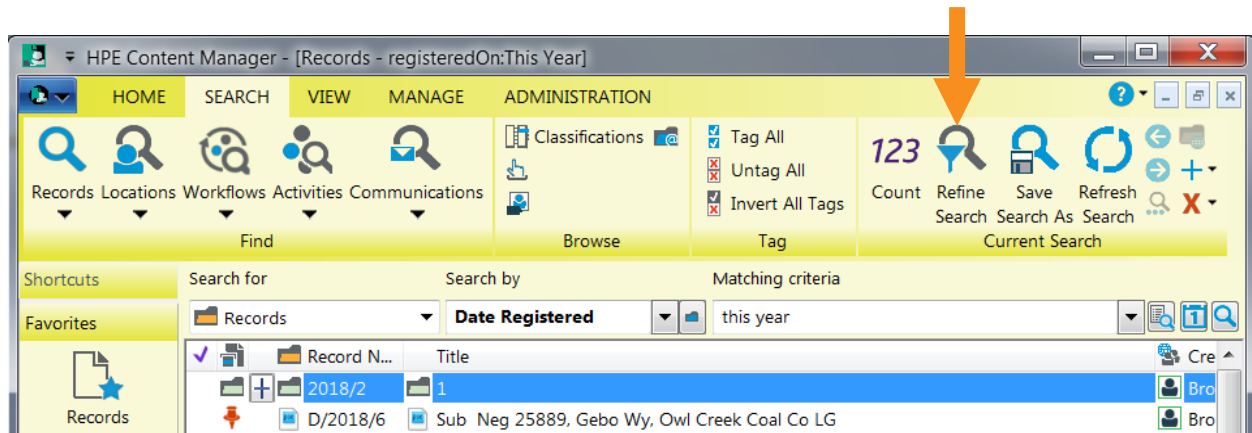
Search Defaults

The steps below will turn on the search default filter, which limits the search results to a specific agency's records:

- In the **MATCHING CRITERIA SEARCH BOX**, enter a general term. In this example the search is for any records registered (added to the Digital Archives) this year.
- To run the search, select the **MAGNIFYING LENS ICON**  or hit **ENTER**.

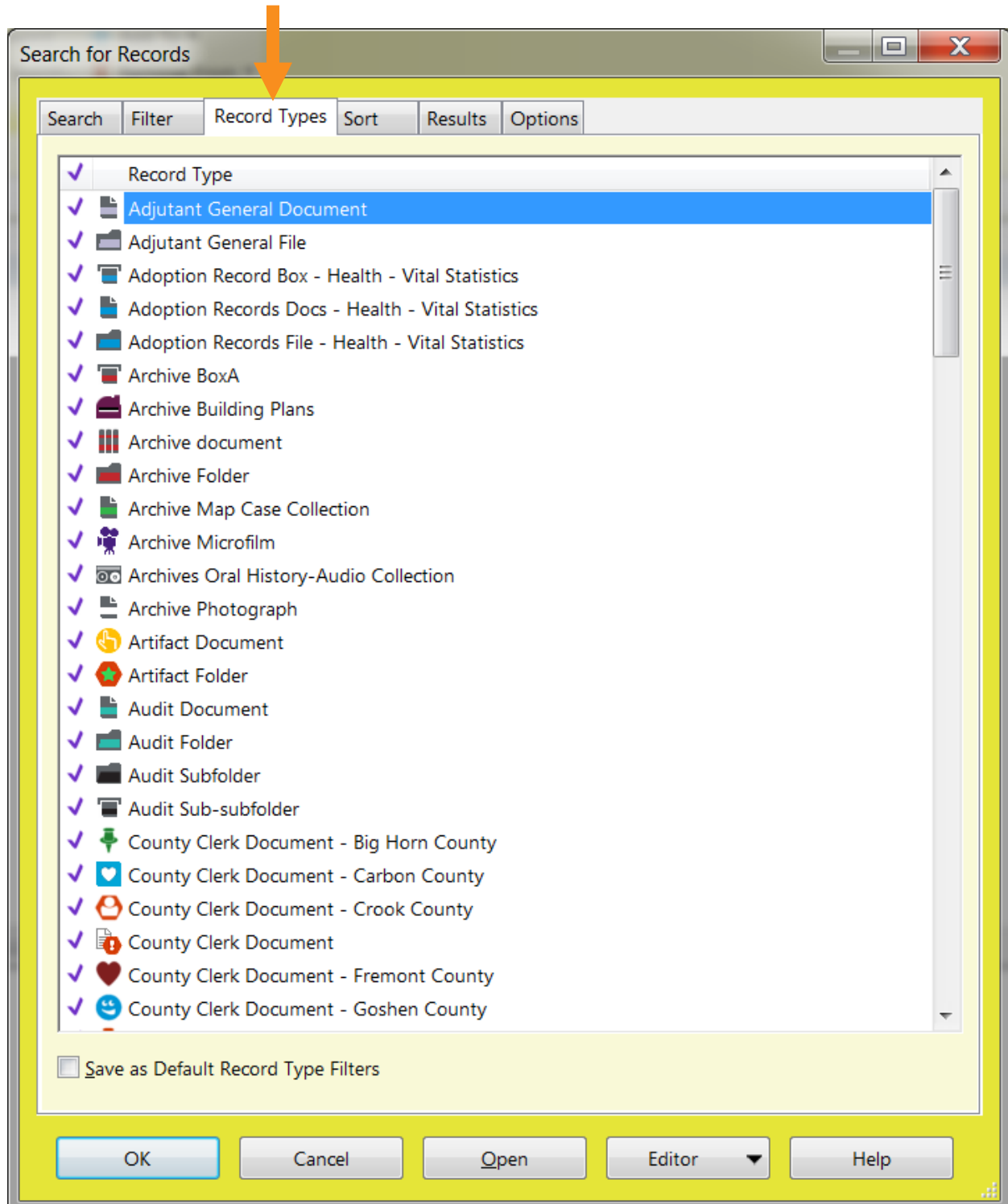


Then select the **REFINE SEARCH** icon .

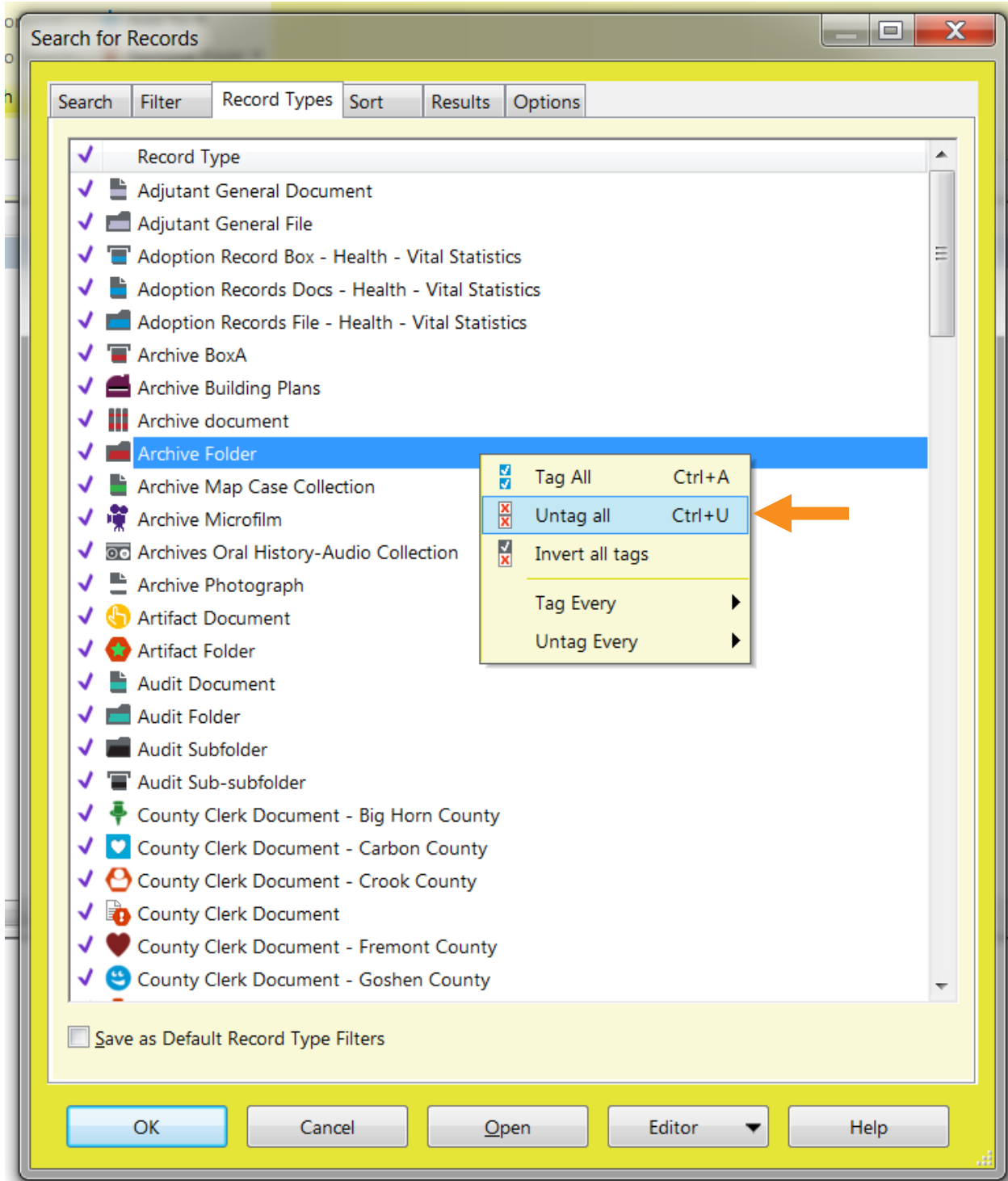


The **SEARCH FOR RECORDS** screen will appear:

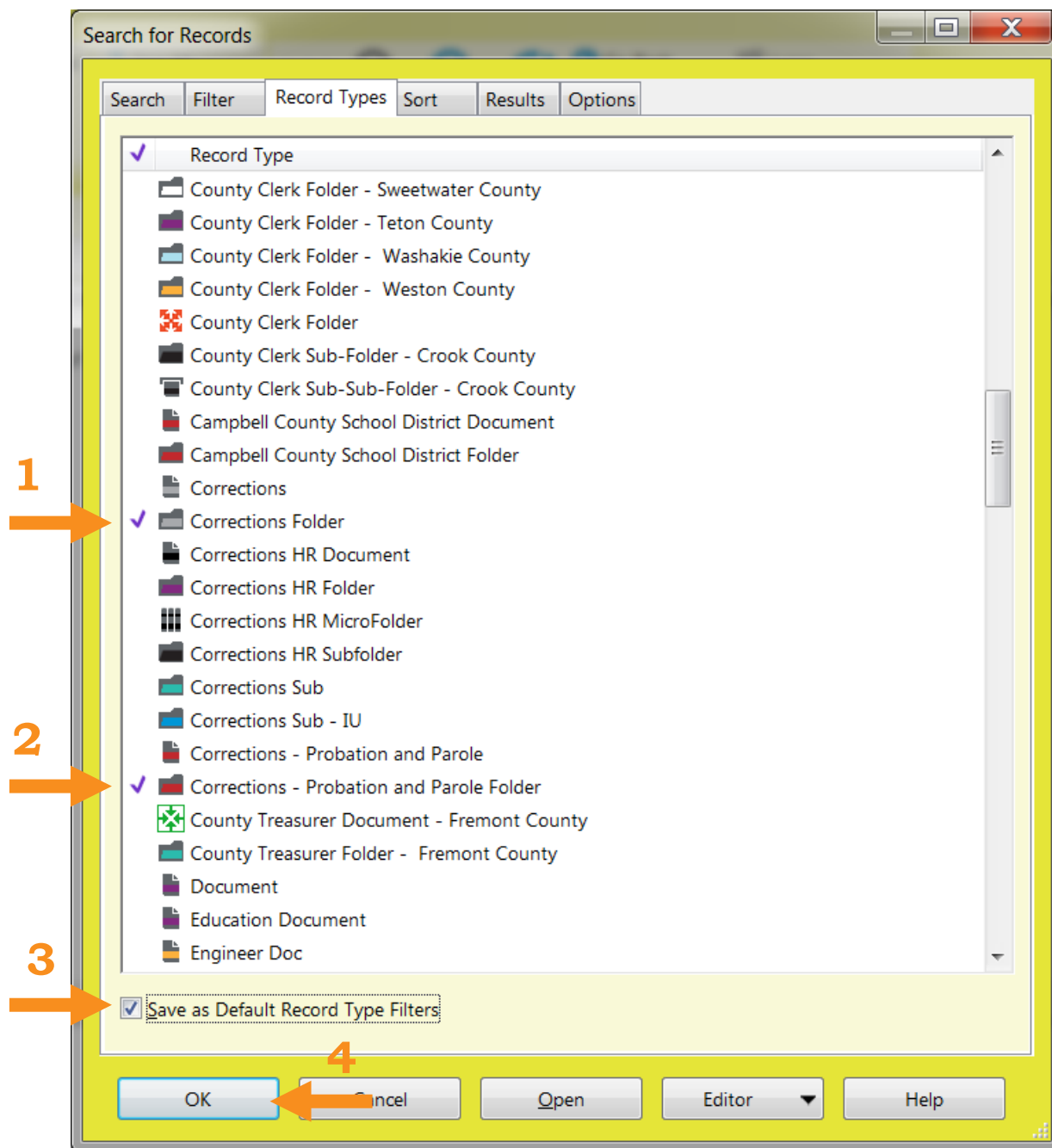
- Select the **RECORD TYPES** tab.



- Right-Click anywhere on the list of **RECORD TYPES**.
- Select **UNTAG ALL**.




- Click ✓ column beside the pertinent **RECORD TYPE/FOLDER** (In this case it is **TWO CORRECTIONS DEPARTMENT FOLDERS**).
- Select/Toggle **SAVE AS DEFAULT RECORD TYPE FILTERS** box.
- Click **OK**.

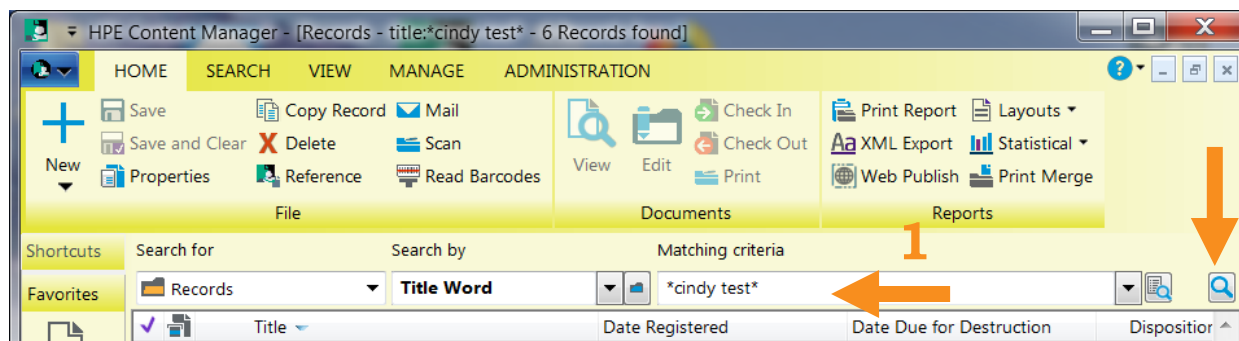


The search defaults have now been set; search results will only include the specified record type/types.

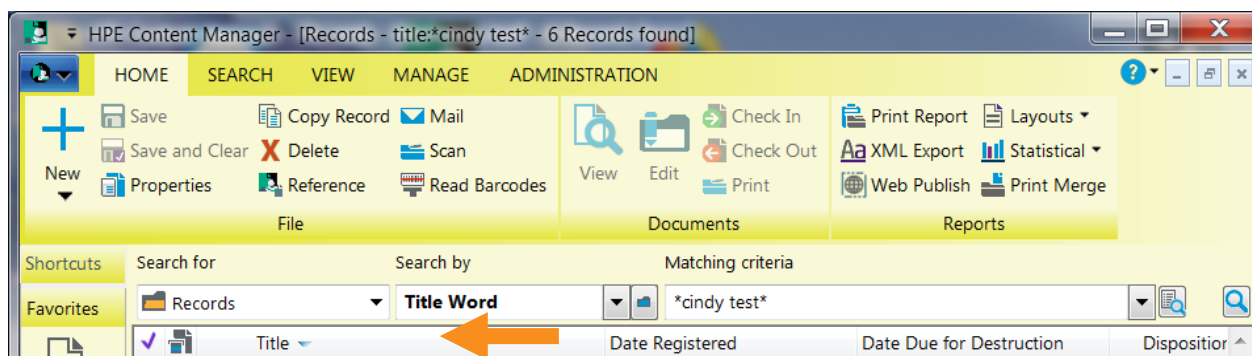
Changing Column Headings

The column headings can be changed to reflect the information included in the record data entry form. To edit the column headings:

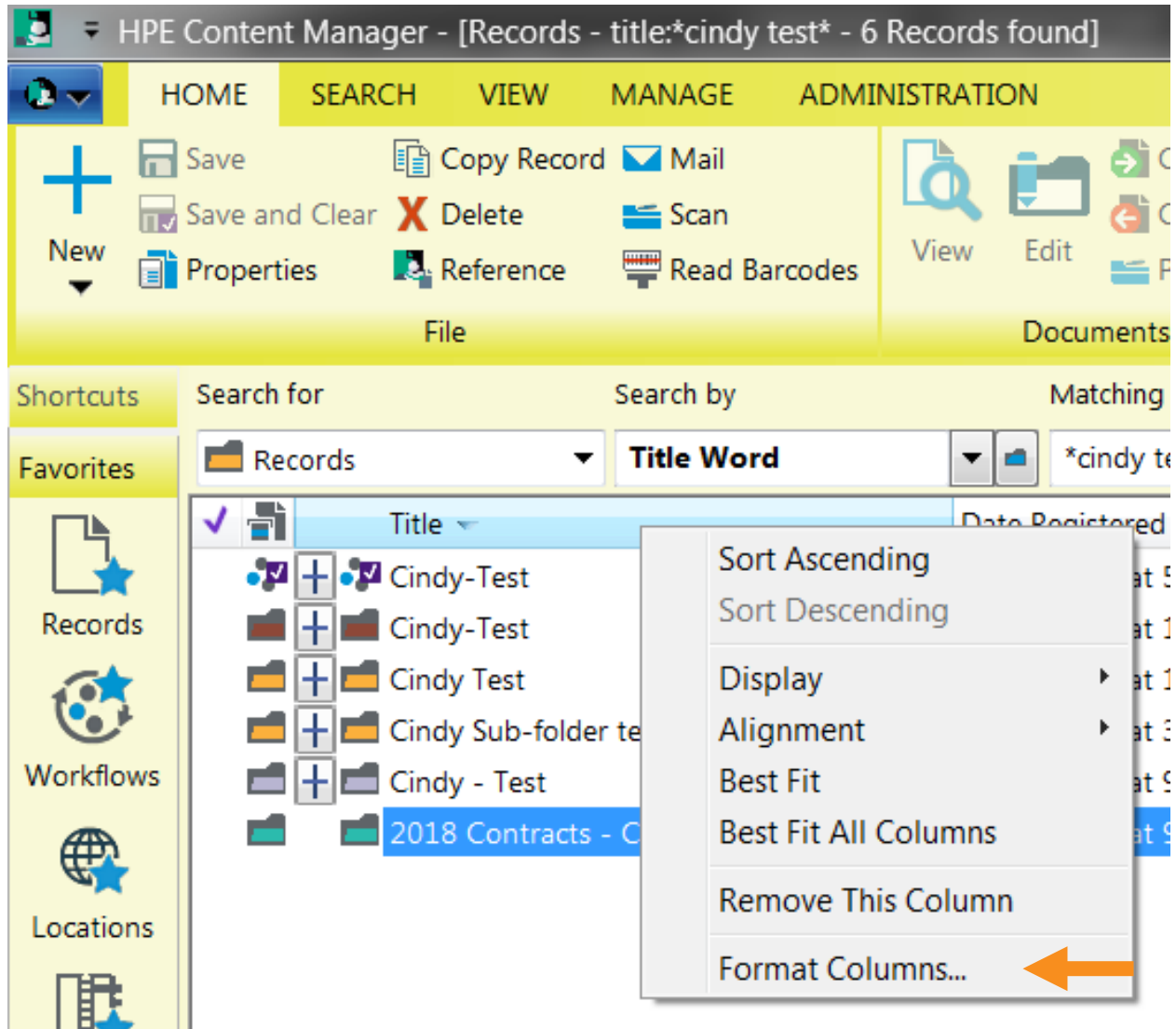
- In the **SEARCH BOX**, enter a general term. In this example the search is for any records with the **TITLE** "cindy test".
- To run the search, select the **MAGNIFYING LENS ICON**  or hit **ENTER**.



- Right-Click on the **COLUMN HEADER LINE**.

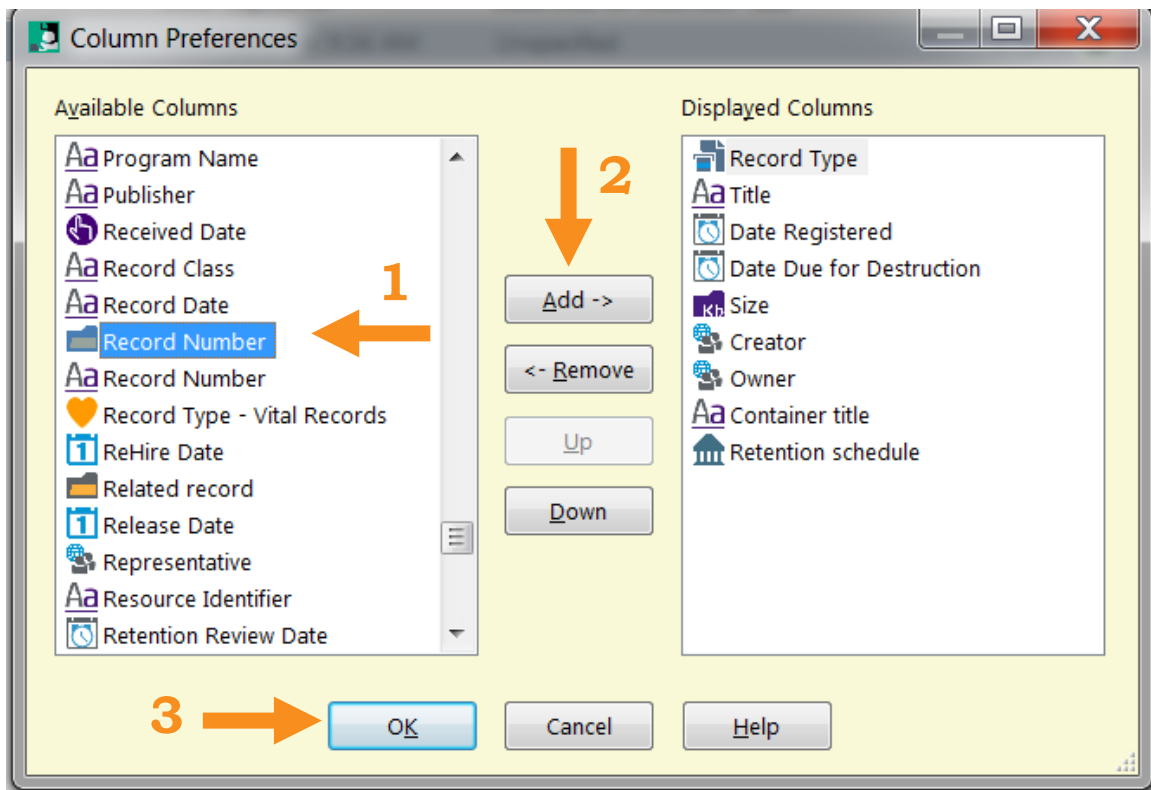


- Select **FORMAT COLUMNS**.

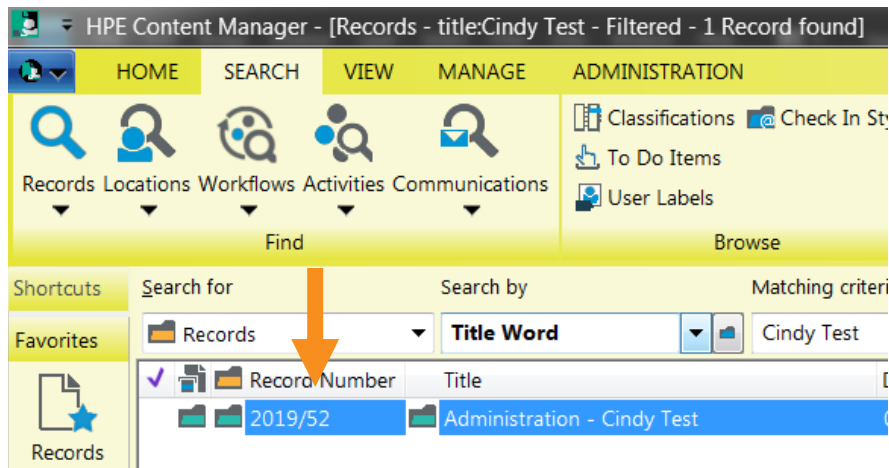


The **COLUMN PREFERENCES** screen will appear select the **COLUMN NAME** from either the Available or Displayed Column list. In this case it is **RECORD NUMBER**

- The displayed columns can also be arranged clicking the **UP/DOWN** buttons.
- Scroll down the **AVAILABLE COLUMNS** list to locate **RECORD NUMBER**.
- Highlight **RECORD NUMBER**.
- Select **ADD**.
- Click **OK**.




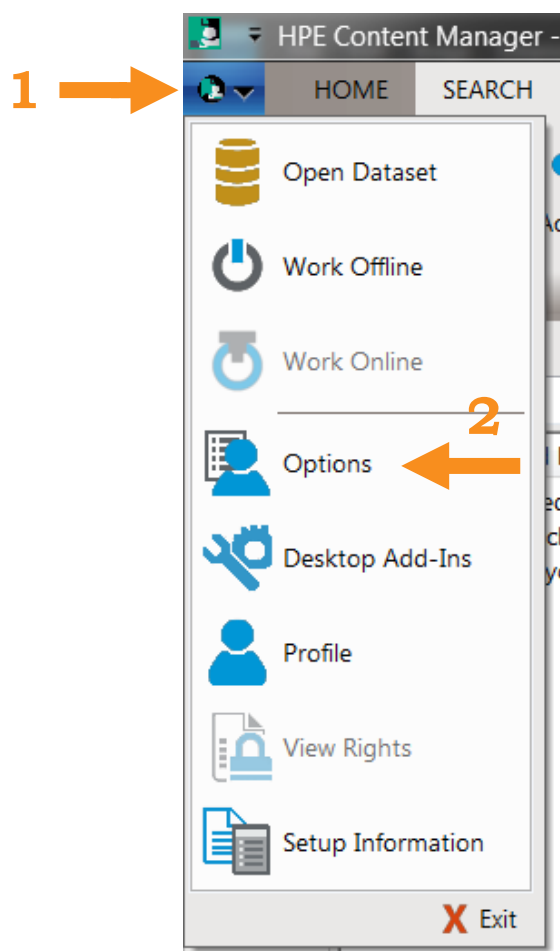
A **NEW** Column has been added to the Search Results. In this example, it is **RECORD NUMBER**. In this example the record number is: **2019/52**



Custom Screen Colors

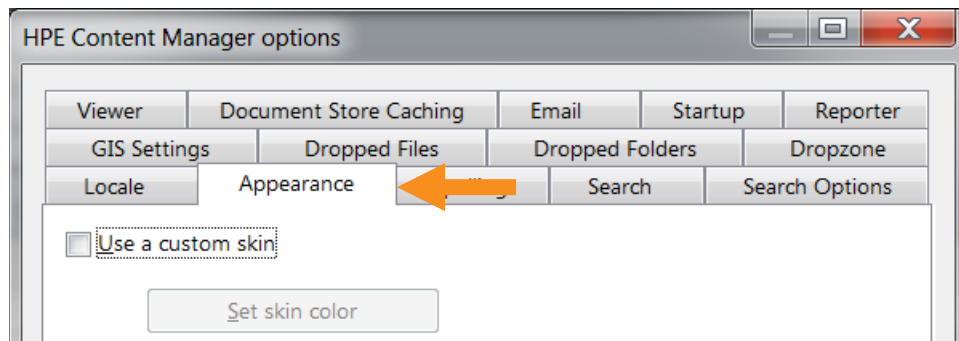
The color of the Digital Archives background screen can be customized to match user preferences. The default setting is shades of blue/gray. To change the color:

- Select the **FILE ICON** .
- Click on **OPTIONS**.

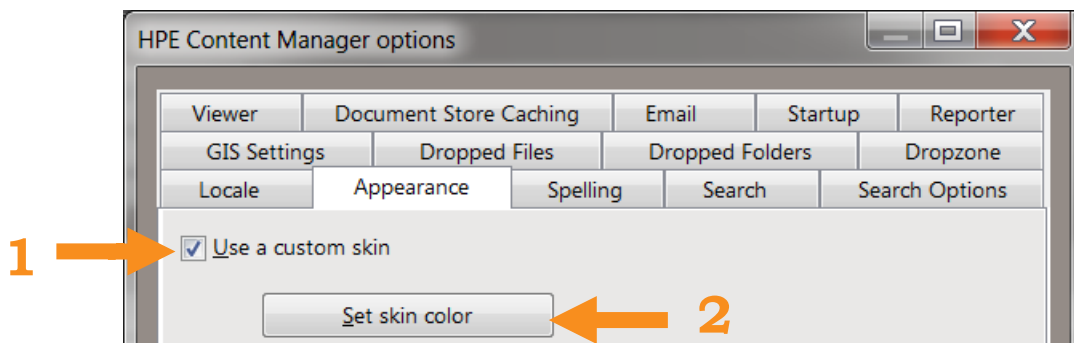


The **HPE CONTENT MANAGER OPTIONS** screen will appear:

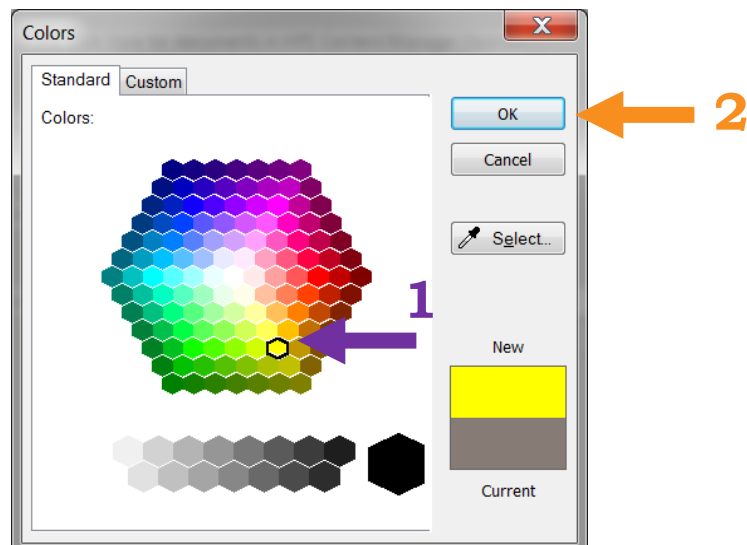
- Select the **APPEARANCE** tab.



- Toggle/Select the **USE A CUSTOM SKIN** box.
- Click the **SET SKIN COLOR BUTTON**.

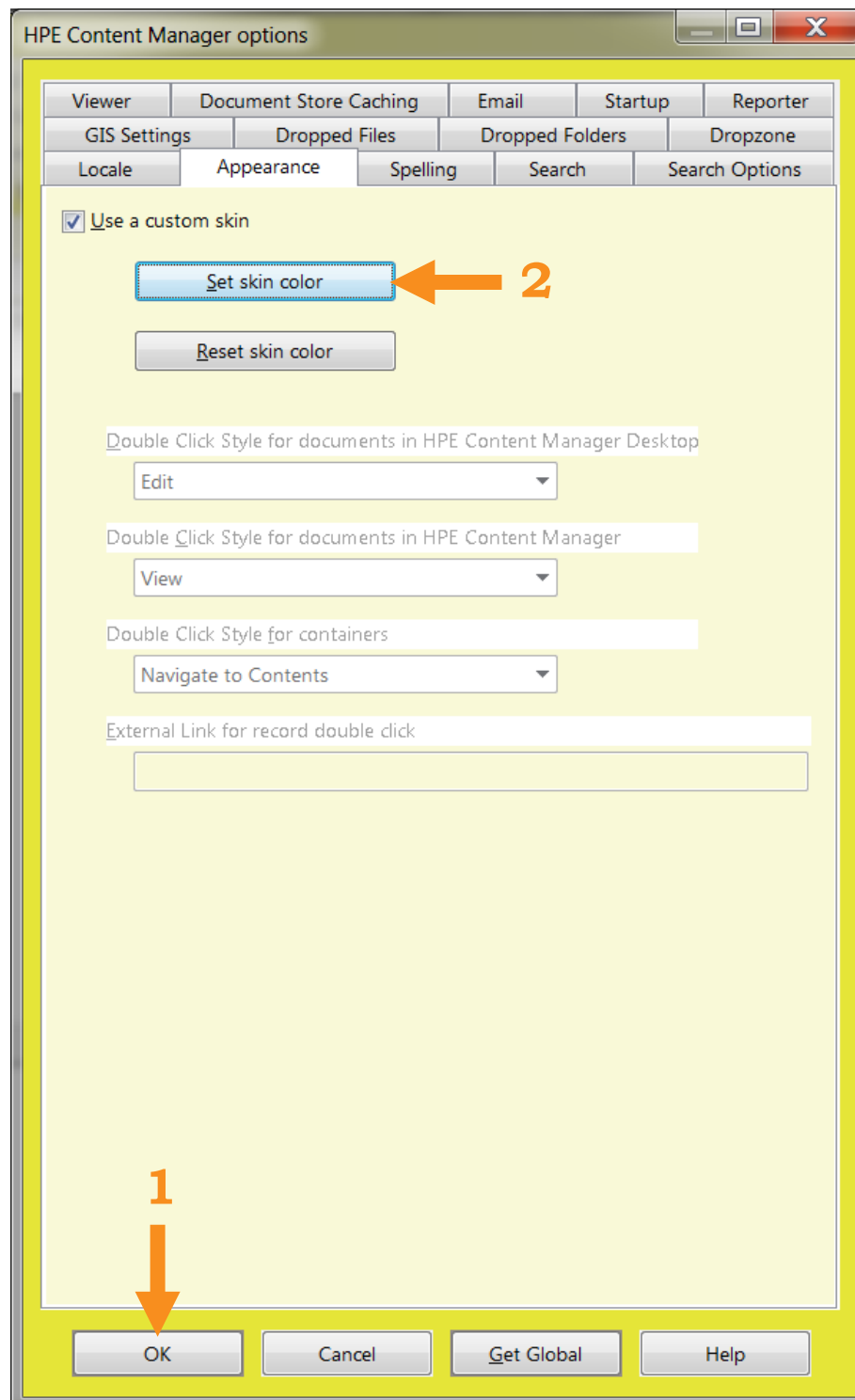


- Tag/Click on any of the color choices.
- Click **OK**.



The **HPE CONTENT MANAGER OPTIONS** screen will appear in the selected color:


- Click **OK** to finish customizing the screen color.
- Or to try again, select **SET SKIN COLOR**.

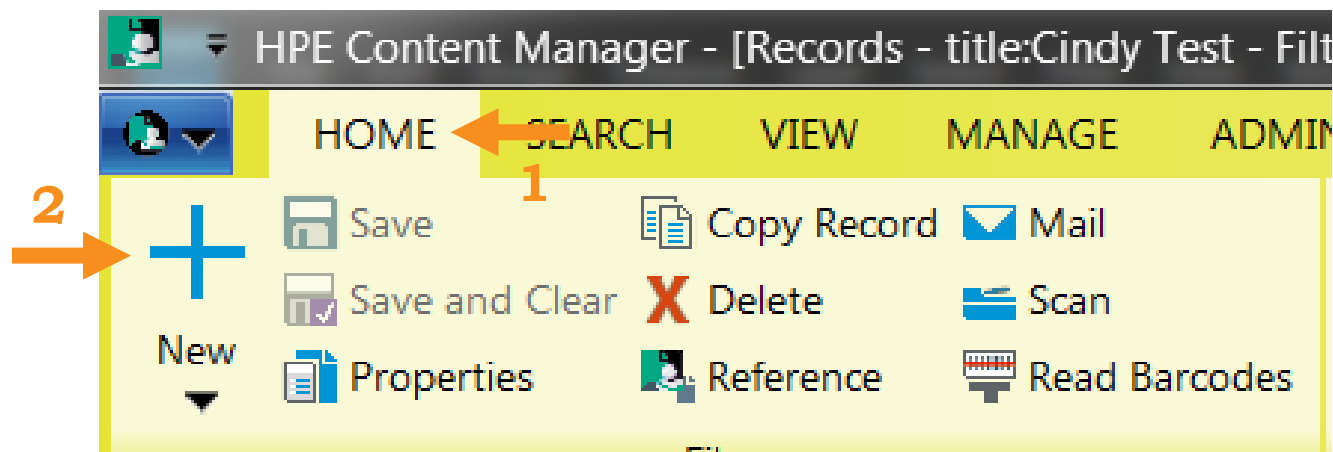


Creating New Folders - Adding New Folders

The type of records and existing filing system can help determine how many folders an agency will need to create and which data entry fields should be used.

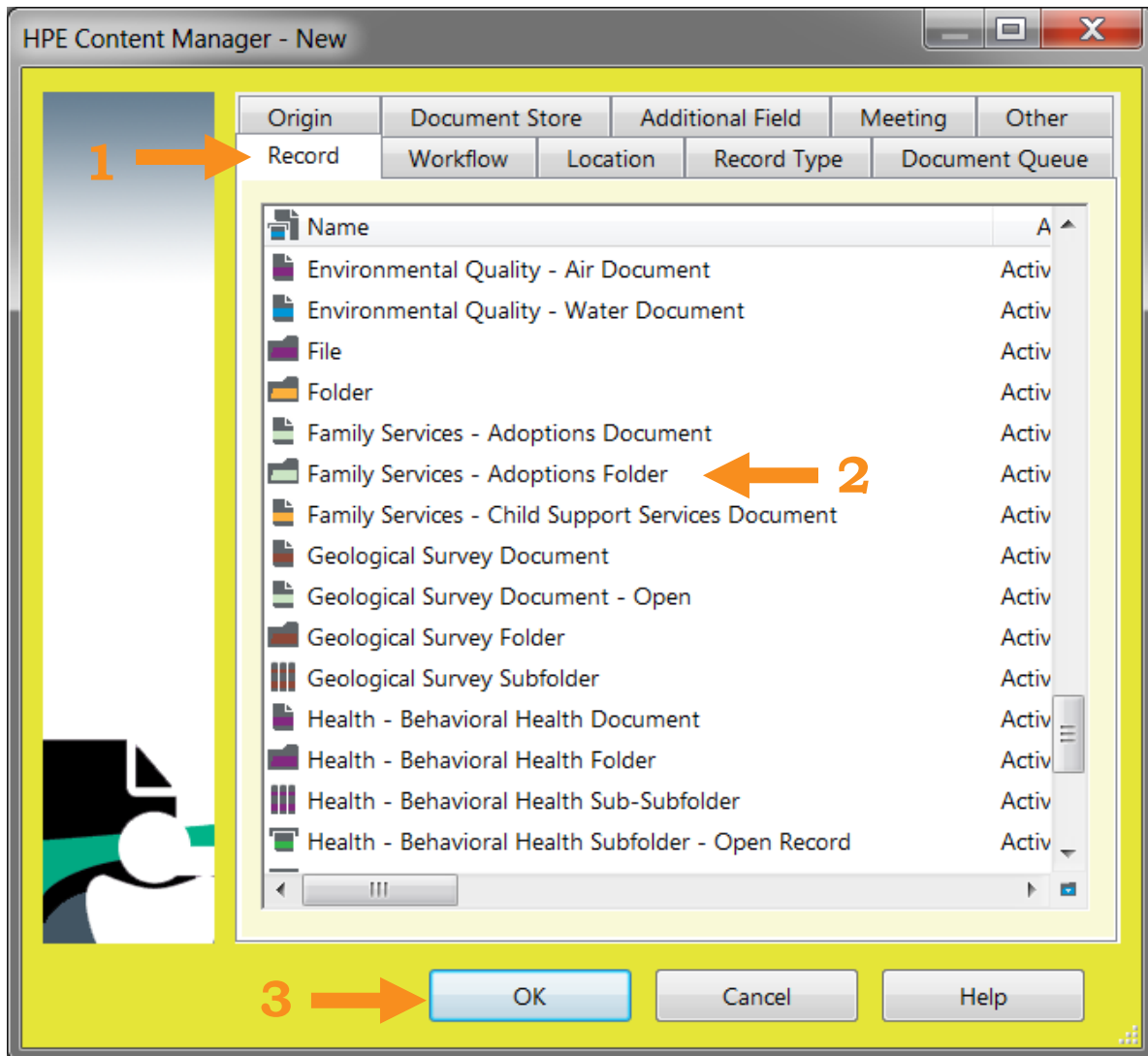
To add a New Folder:

- Select the **HOME** tab.
- Select the **NEW**  icon.



The **HPE CONTENT MANAGER - NEW** screen will appear:

- In the **RECORD** tab, scroll down until the pertinent record type to be created appears (for example: Family Service - Adoptions Folder).
- Highlight/Select the **RECORD TYPE**.
- Click **OK**.



The **DATA ENTRY FORM** will appear:

- Complete the pertinent data entry form **FIELDS**.
- Click **OK**.
- Note: The **CLASSIFICATION FIELD** correlates to the **RETENTION SCHEDULE** for the records. It is usually a **REQUIRED FIELD** and must be completed. In some cases the field may already be filled, because it is set to default to a specific Classification.

Please contact the State Archives staff if help is needed selecting the correct **CLASSIFICATION**.

- There may be additional required fields, which must be completed. The software will prompt the user to complete the fields, before the folder can be created.

The screenshot shows a Windows-style dialog box titled "New Family Services - Adoptions Folder". It has a "General" tab selected. The "Classification" field is a dropdown menu currently showing "Legal and Judiciary - Legal Matter Management - Adoptions". An orange arrow labeled "1" points to this field. Below it are several text input fields: "Adopted Child's New Name (Last Name, First Name)" with "test", "Adopted Child's Birth Name (Last Name, First Name)" with "test", "Adopted Child's DOB" with "01/01/2000", "Adopted Parent Name (Last Name, First Name)" with "test", and "Bio Parent Name (Last Name, First Name)" with "test". There are also date and time pickers for "Placement Date", "Finalized Date", and "Place of Birth". At the bottom, there are three buttons: "OK", "Cancel", and "Help". An orange arrow labeled "2" points to the "OK" button.

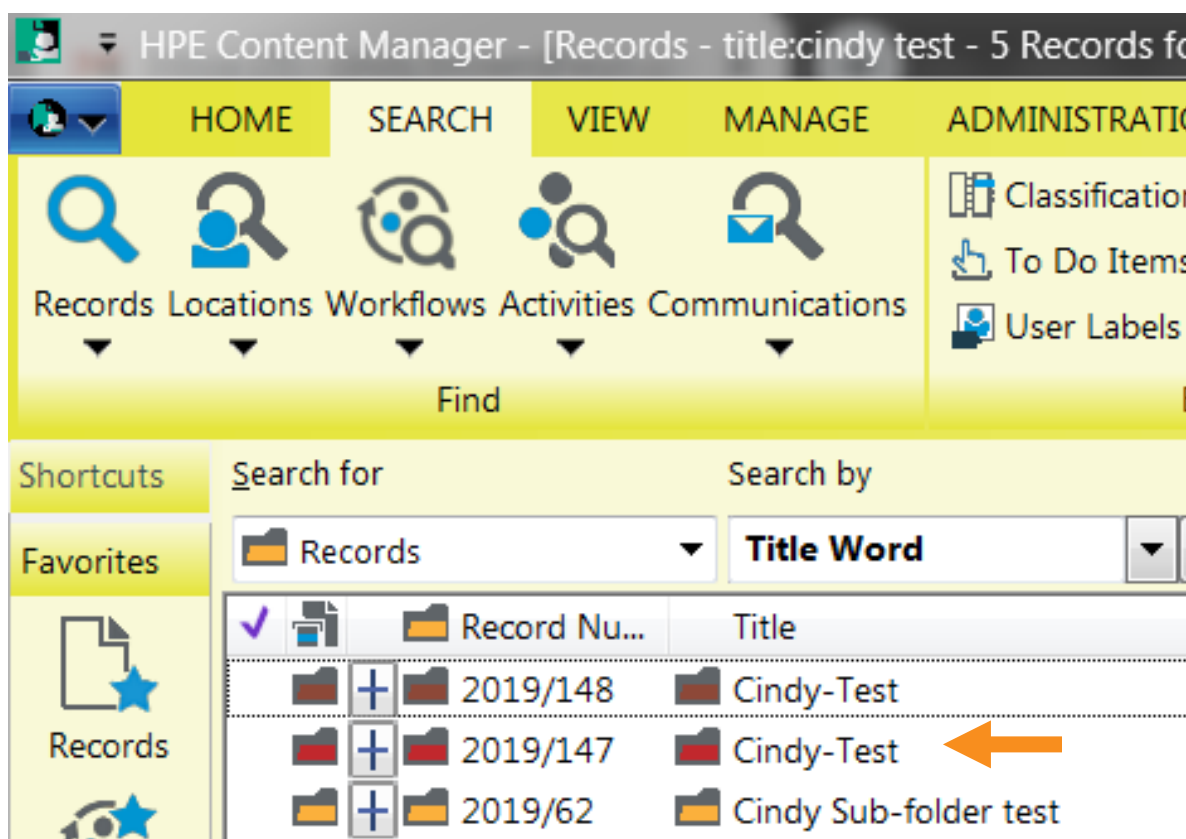
The new folder has been created.

Creating New Folders - Copying Folders

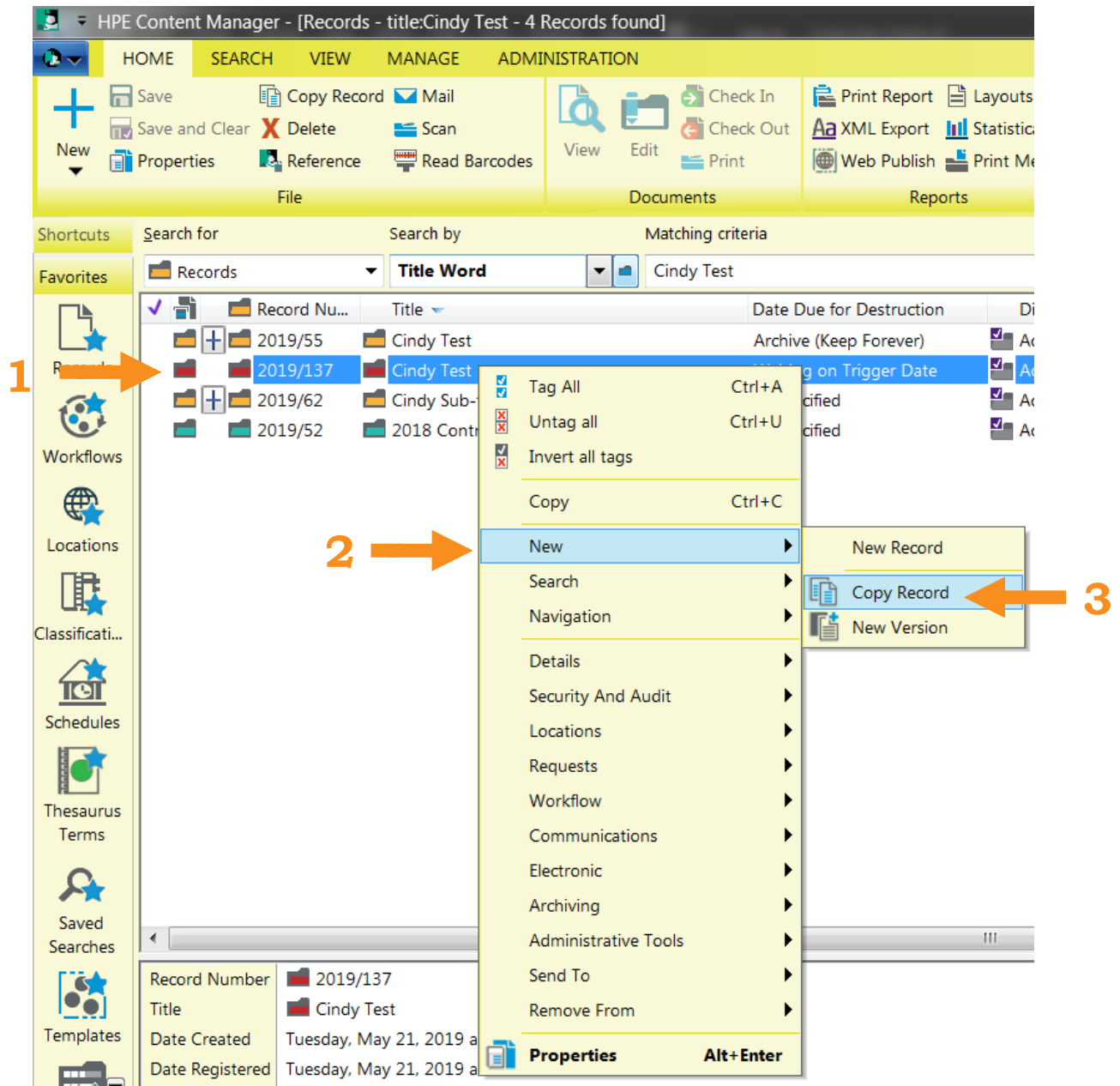
New Folders can also be created by **COPYING** and then **EDITING** the duplicate folder. Care must be taken to edit the data entry form; otherwise the new folder will have the exact same title and fields.

To copy an existing folder:

- Search for the existing folder.
- **HIGHLIGHT/SELECT** the folder to copy.



- **RIGHT-CLICK** on the Folder.
- Select **NEW**.
- Click on **COPY RECORD**.



The **COPY RECORD SCREEN** will appear:

- **TOGGLE/UNTOGGLE** the boxes to match the screen below.
- Then click **OK**.

Copy Record - 2019/137

Select properties to copy

<input type="checkbox"/> Security profile	<input checked="" type="checkbox"/> Assignee
<input type="checkbox"/> Access Control	<input checked="" type="checkbox"/> Owner
<input type="checkbox"/> Disposition	<input checked="" type="checkbox"/> Home
<input checked="" type="checkbox"/> Attached thesaurus terms	<input checked="" type="checkbox"/> Container
<input checked="" type="checkbox"/> Attached classification	<input type="text" value=""/>
<input checked="" type="checkbox"/> Relationships	<input type="checkbox"/> Electronic document
<input checked="" type="checkbox"/> Notes	<input type="checkbox"/> Retention schedule
<input checked="" type="checkbox"/> Attached actions	<input checked="" type="checkbox"/> Date fields
<input checked="" type="checkbox"/> Additional fields	
<input checked="" type="checkbox"/> Contacts	

Select all

Select none

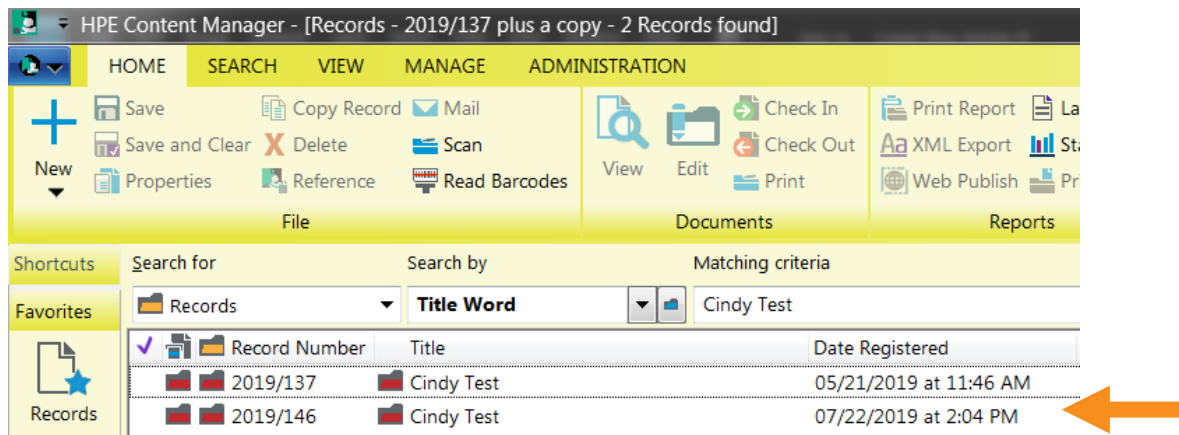
Number of copies

1

☐ Relate the records as 'Original/Copy'

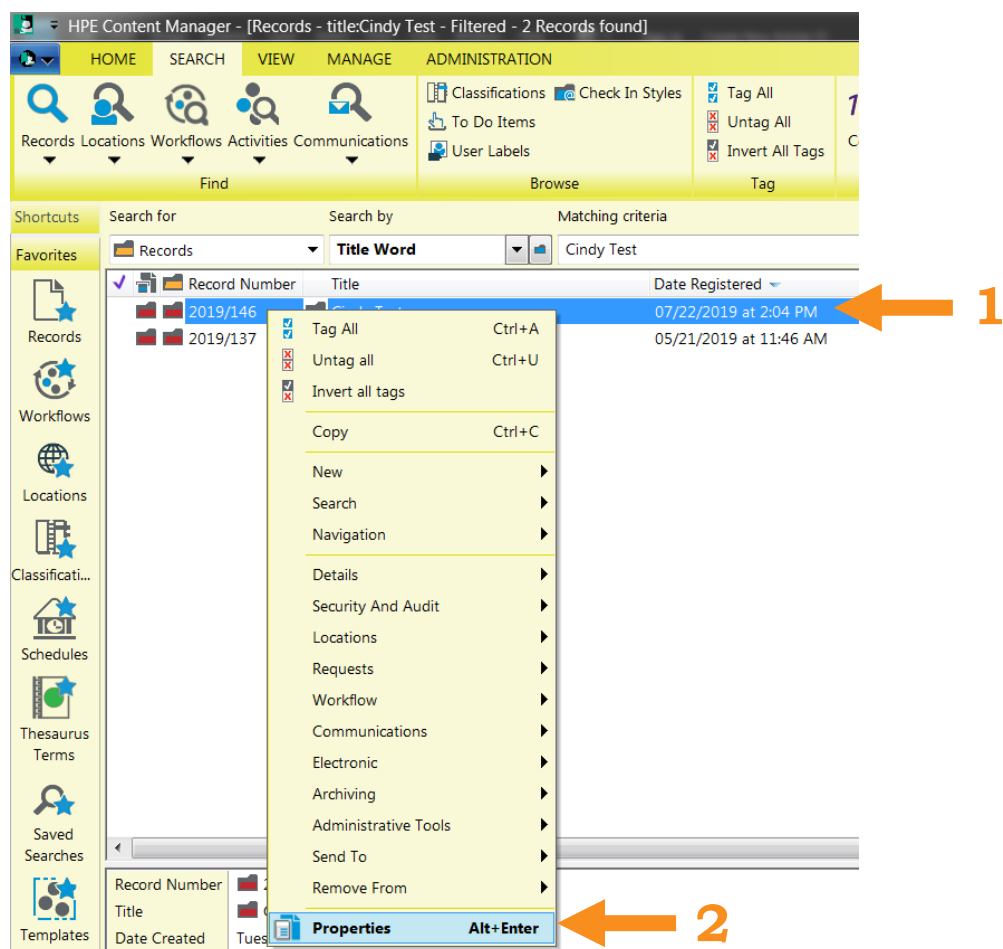
OK Cancel Help

The New (copied) Folder will appear on the screen with the Old Folder.
 (Note: To determine which one is the new folder, look at the **DATE REGISTERED** column).



To **EDIT** the Title or Data Entry Form of the New (copied) Folder:

- **RIGHT-CLICK** on the New (copied) Folder.
- Select **PROPERTIES**.



The **DATA ENTRY FORM** will appear on the screen:

- **EDIT** it as needed.
- Click **OK**.

Campbell County School District Folder - 2019/146

Attached thesaurus terms | Record jurisdictions | Scheduled Tasks

General | Record Actions | Contacts | Related records

Title (Free Text Part) Cindy Test - New Folder

Classification Administrative - Education - Student Records

Notes

Date Created 05/21/2019 11:45:27 AM

2 → OK Cancel Help

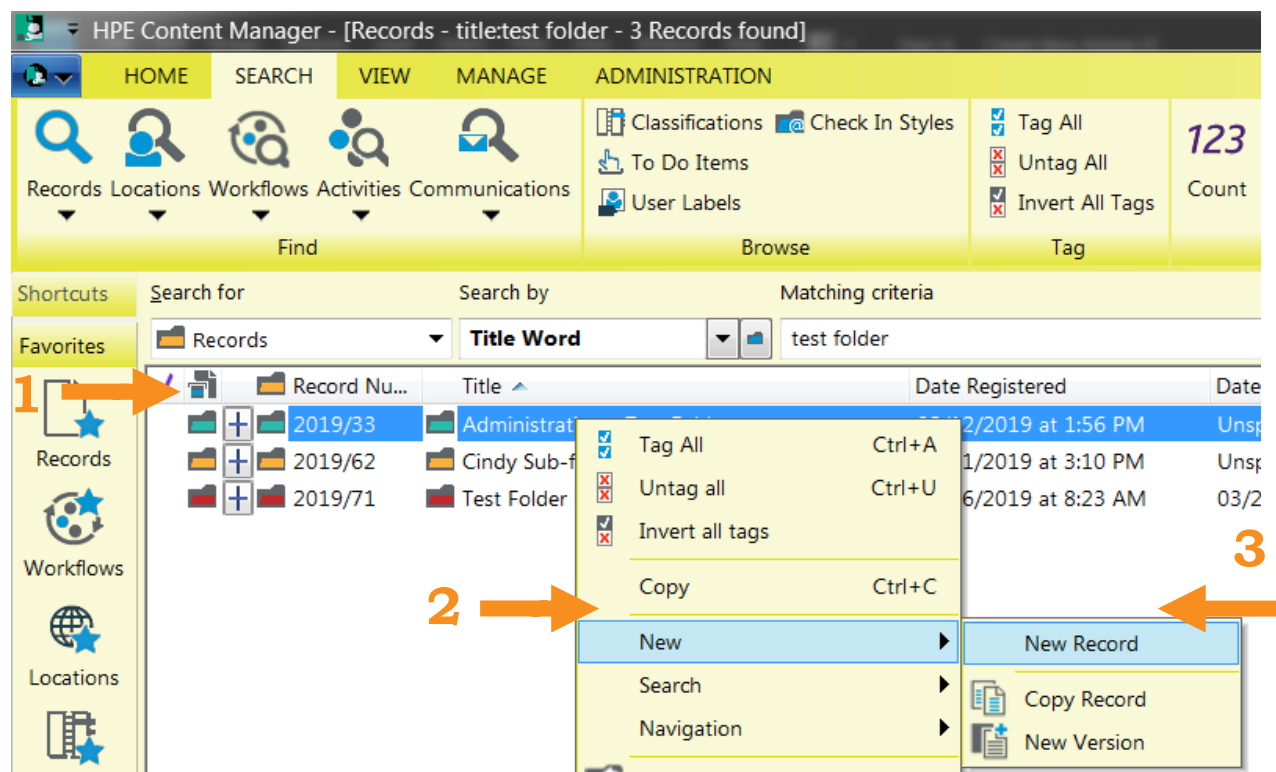
The new folder has been created.

Creating New Sub-Folders

New sub-folders can be added to/nested within **EXISTING** folders using the method below:

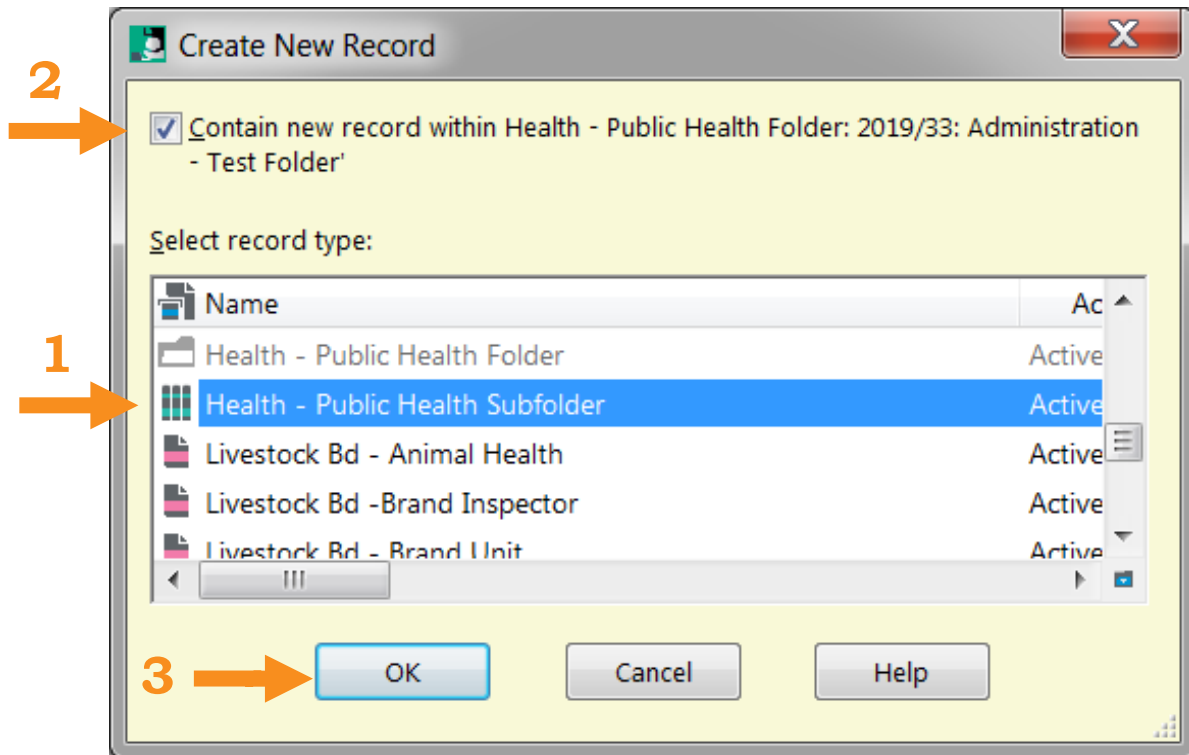
Search for the pertinent folder. Then:

- Highlight/Select the **FOLDER** which requires a sub-folder.
- **RIGHT-CLICK**.
- Select **NEW**.
- Click on **NEW RECORD**.



The **CREATE NEW RECORD** screen will appear:

- Select/Highlight the pertinent **SUBFOLDER RECORD TYPE**.
- Toggle the **CONTAIN NEW RECORD WITHIN** (the folder info) box.
- Click **OK**.



The **DATA ENTRY FORM** will appear on the screen:

- Complete the fields on the **DATA ENTRY FORM** as needed.
- Click **OK**.

The screenshot shows a Windows-style dialog box titled "New Health - Public Health Subfolder". It has two tabs: "General" and "Scheduled Tasks". The "General" tab is selected. Inside the dialog, there is a "Fiscal Year - Title (Free Text Part)" field, a "Notes" field, and a "Container" field containing the text "2019/33". Below the "Container" field is a checkbox labeled "Enclosed?" which is checked. At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help". An orange arrow labeled "1" points to the "Notes" field, and an orange arrow labeled "2" points to the "OK" button.

The new Sub-Folder has now been created/nested inside the selected Folder.

(Note: if the same Sub-Folders names are constantly used, the State Archives staff can set a default to automatically create Sub-Folders every time a new Folder is made.)

Adding Documents - Document Queues

PREP WORK: The **DOCUMENT QUEUE** will need to be created both on the user's network computer and linked in the Digital Archives. The State Archives staff can help with preliminary set up the Document Queue in the Digital Archives, but the user will need to link it to the network computer folder. Or for instructions, see the [Advanced User Instructions](#) below.

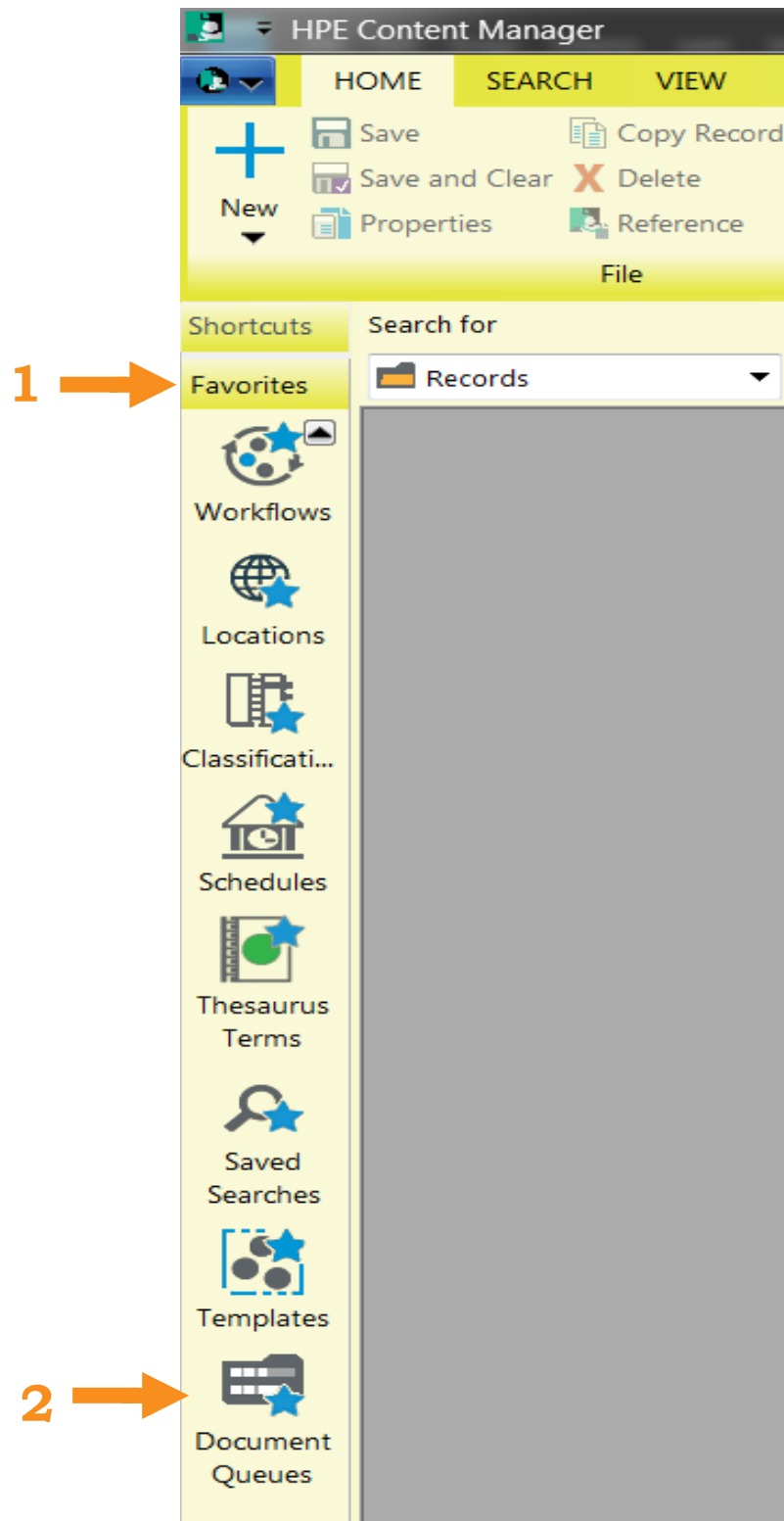
Note: When the Document Queue is used, the documents are not added directly into a Folder, the documents are "loose" in the Digital Archives. However, the default settings on the Document Queue can be set up to select a specific folder (container). But this is not recommended for most users, because the default settings will need to be **updated every time** a different folder is required.

To add documents to the Wyoming Digital Archives:

- Move copies of records into the user's computer/network queue folder. (**Note:** the records from the computer/network queue folder will be **DELETED** as they're being added to the Digital Archives.)

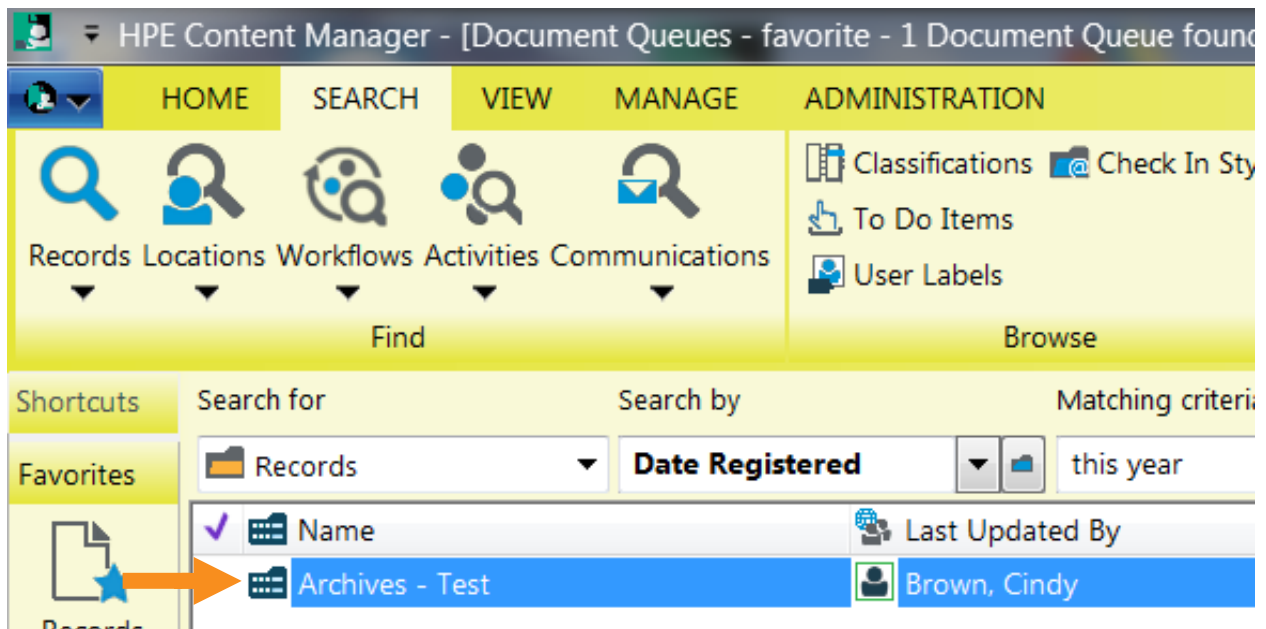
In the Digital Archives:

- Under the **FAVORITES SHORTCUT TRAY**, select the **DOCUMENT QUEUES** icon:

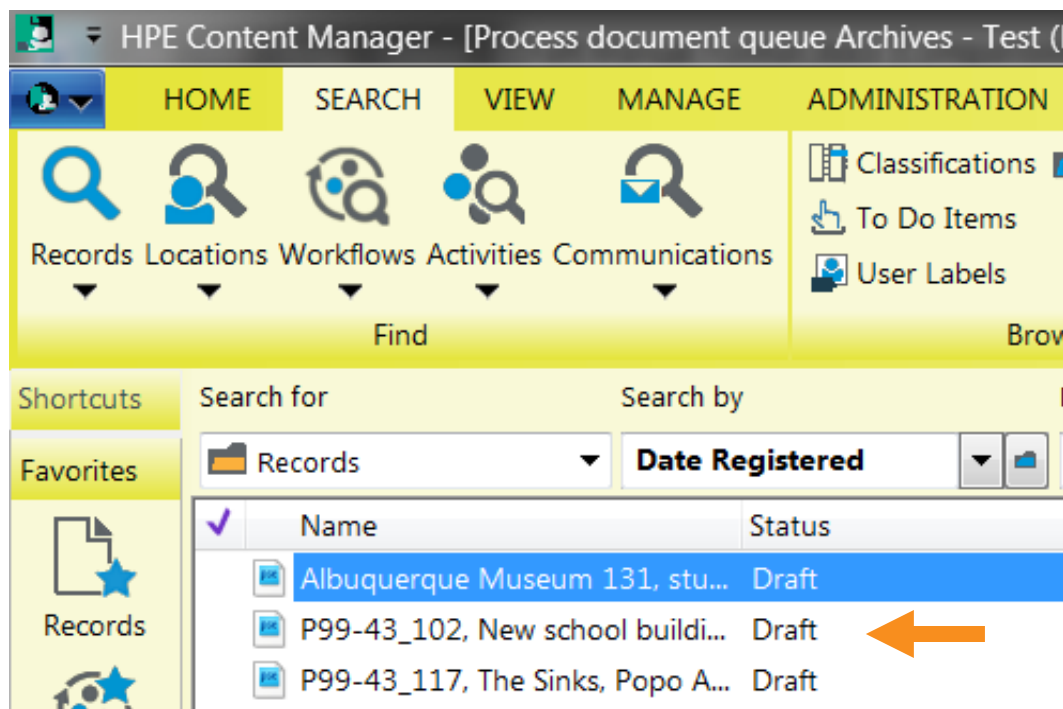


The **DOCUMENT QUEUES** will appear on the screen:

- Double-Click on the pertinent **QUEUE** to open it.

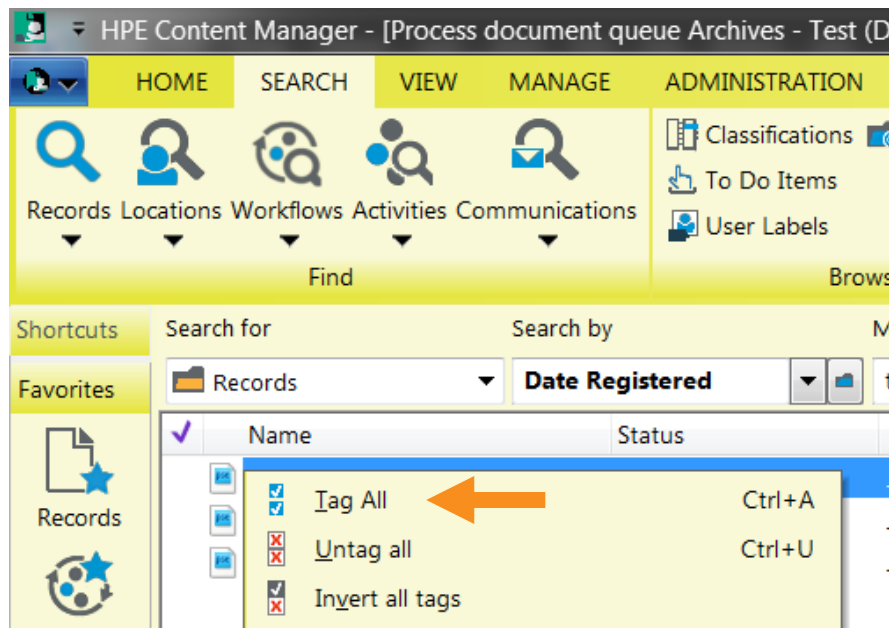


The records from the computer/network **DOCUMENT QUEUE** should appear on the **PROCESS DOCUMENT QUEUE** list:



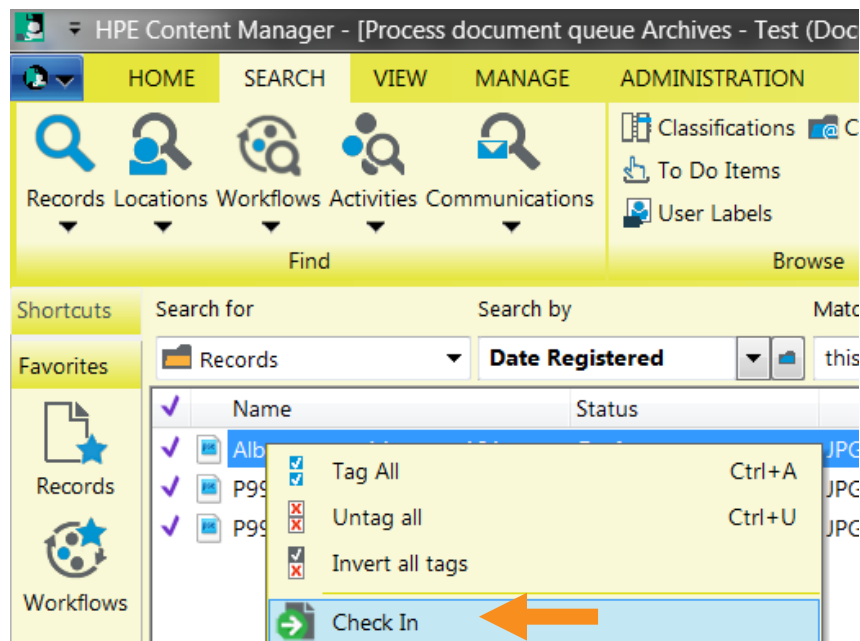
To select the records in the Document Queue:

- **RIGHT-CLICK** on any of the documents.
- Select **TAG ALL**.



Then, to add the documents to the Digital Archives:

- **RIGHT-CLICK** on any of the documents.
- Select **CHECK IN**.



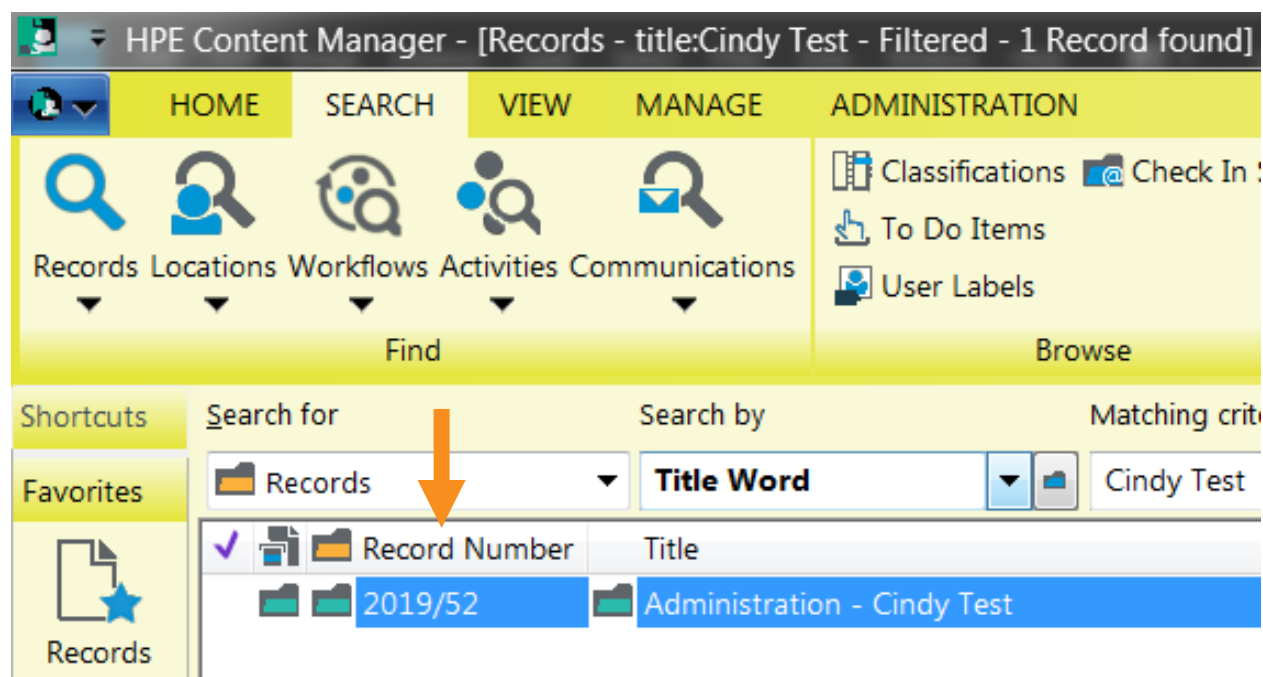
Once the records have been checked in, the documents will no longer be listed on the screen. They will automatically be **DELETED** from the network folder and the records have been added to the Digital Archives.

The documents will then need to be added to a folder ([see instructions below](#))

Moving Documents into Folders

In order to add documents to a folder, the user will need to know the **RECORD NUMBER** for the **FOLDER**. To determine the **RECORD NUMBER**:

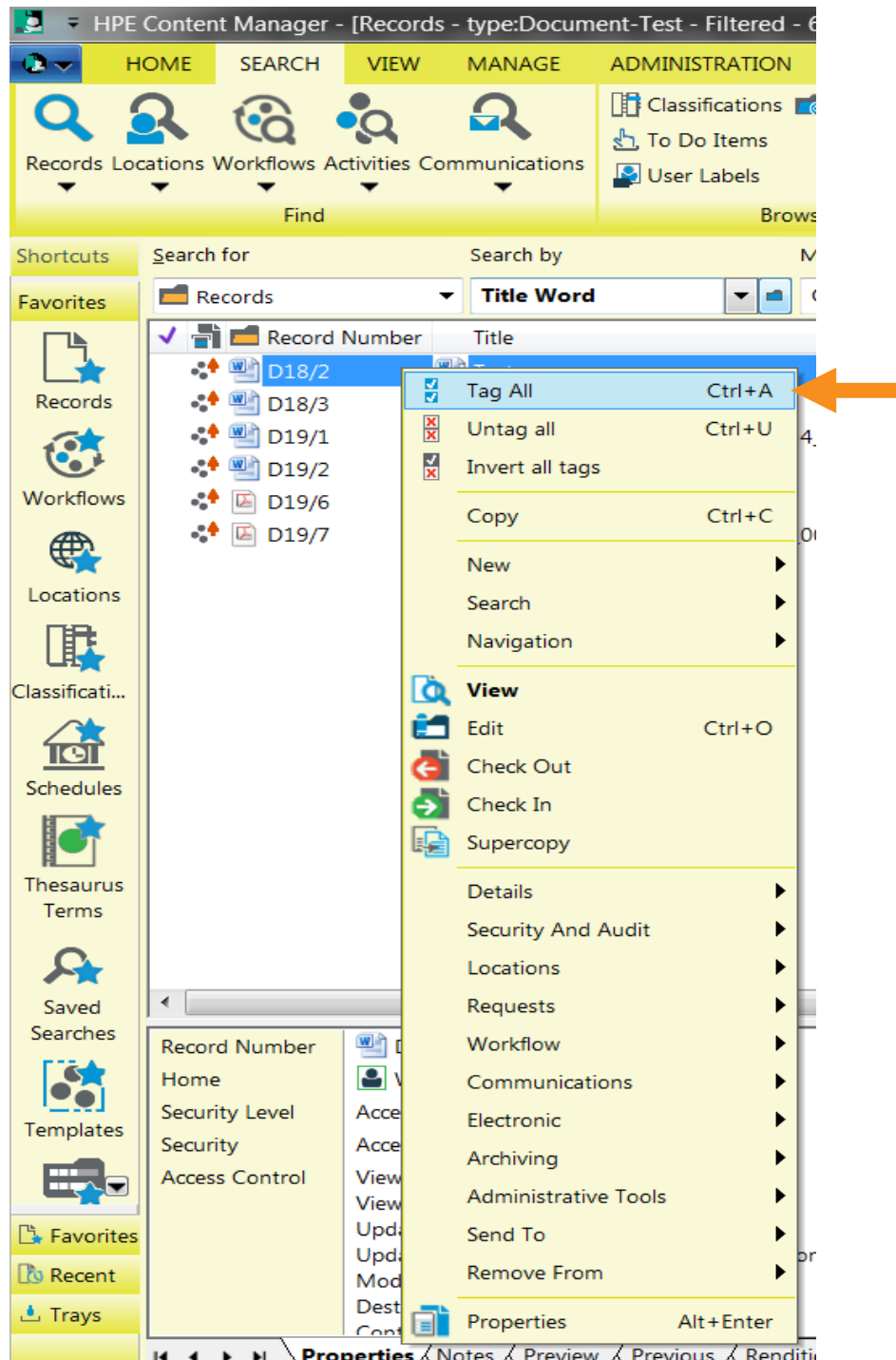
- Search for the name of the **FOLDER**. In this example it is: "Cindy Test".



If the **RECORD NUMBER** column does not appear in the search screen, the columns will need to be formatted to show it ([see instructions for changing column headings](#)):

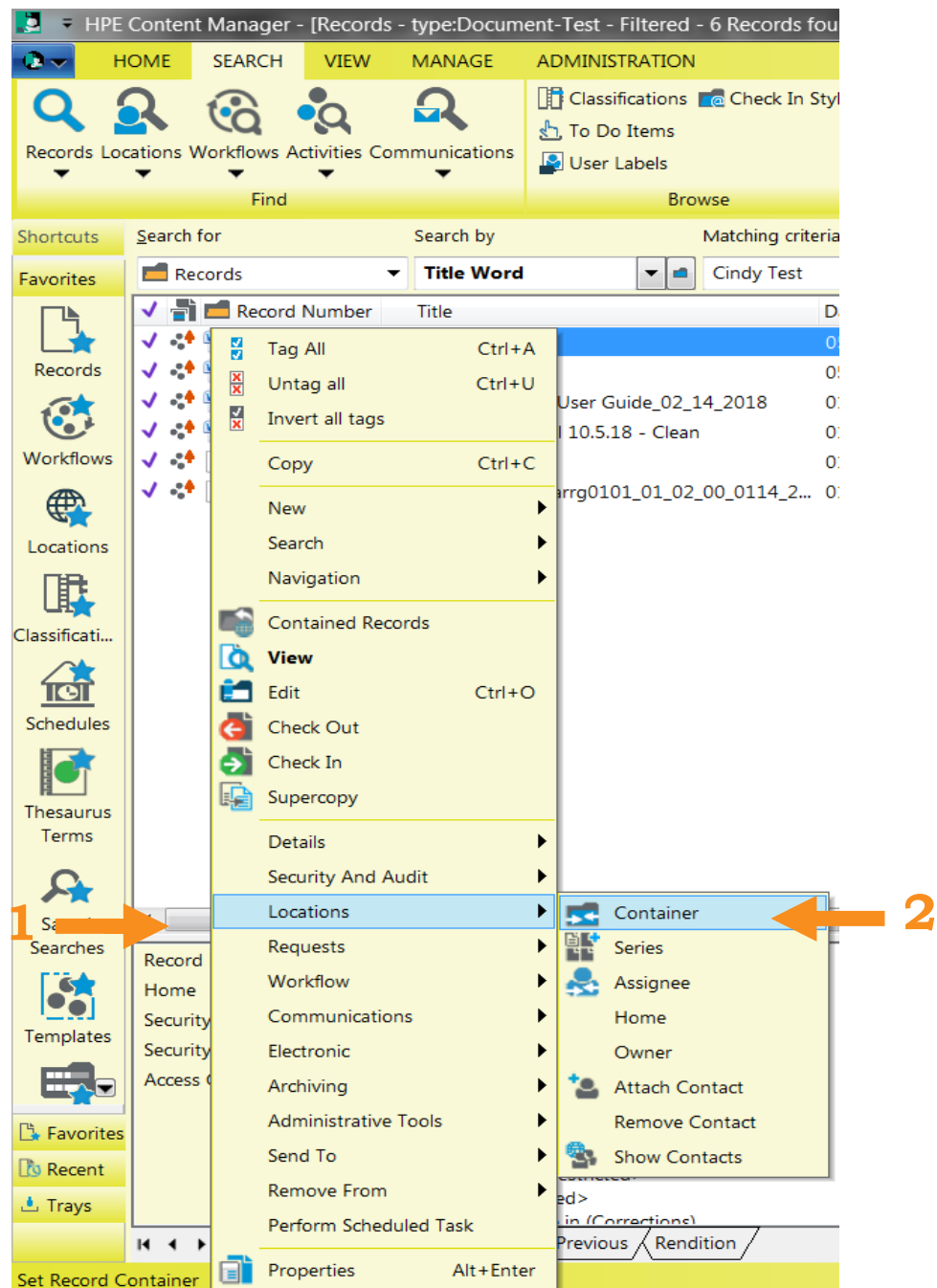
To select the documents to put in the folder:

- Search for the **PERTINENT DOCUMENTS**.
- Right-click on any of the documents, then select **TAG ALL** (Note: un-tag any documents or folders that do not need to be moved)



To add the selected documents to the Folder:

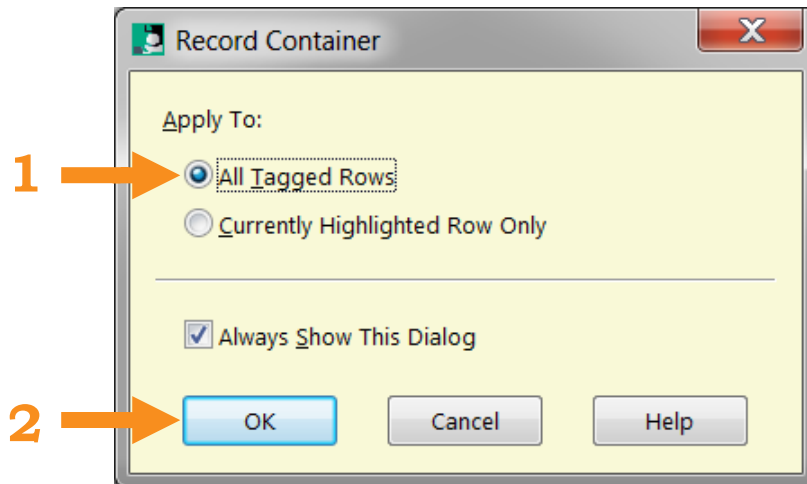
- Right-Click on any of the documents, then select **LOCATIONS**.
- Click on **CONTAINER**.



The **RECORD CONTAINER** screen will appear:

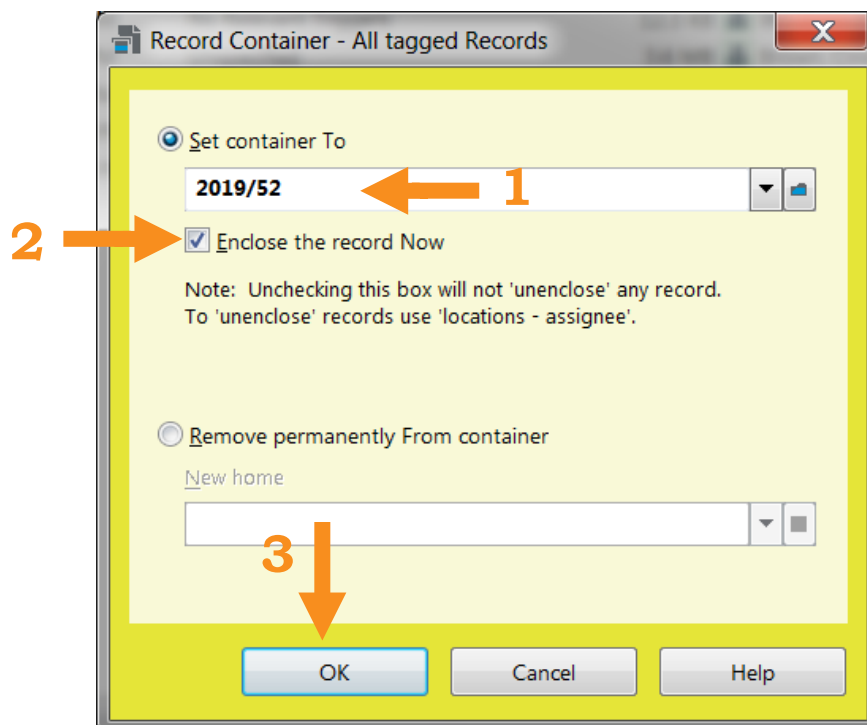
Toggle Apply to: **ALL TAGGED ROWS**.

Click **OK**.



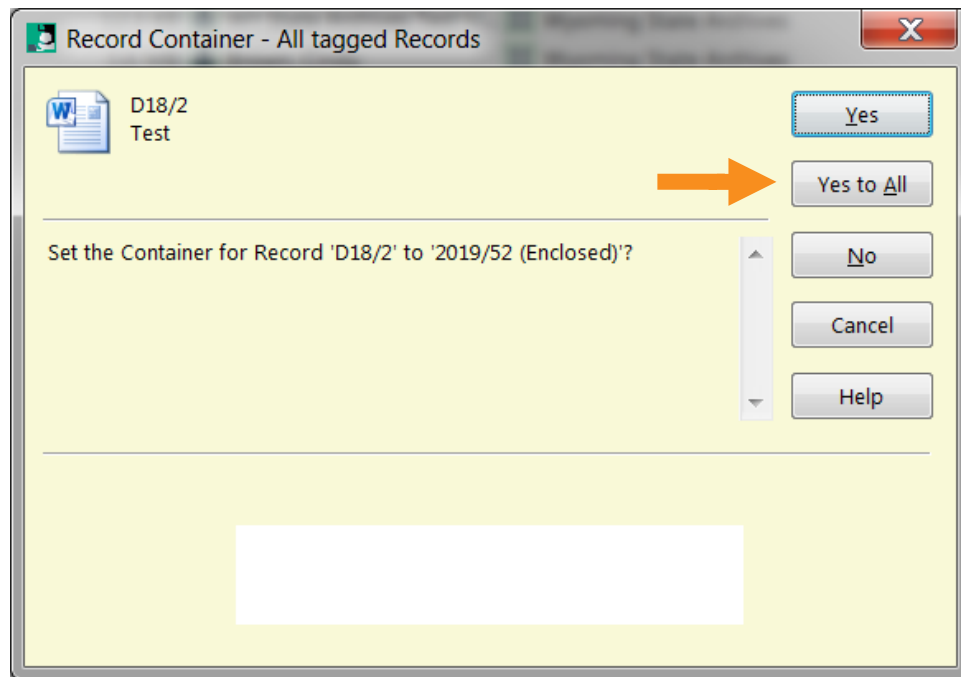
The **RECORD CONTAINER - ALL TAGGED RECORDS** screen will appear:

- Add the **RECORD NUMBER** in the **SET CONTAINER TO** field.
- Toggle **ENCLOSE THE RECORD NOW** box.
- Click **OK**.



The **RECORD CONTAINER - ALL TAGGED ROWS** screen will reappear:

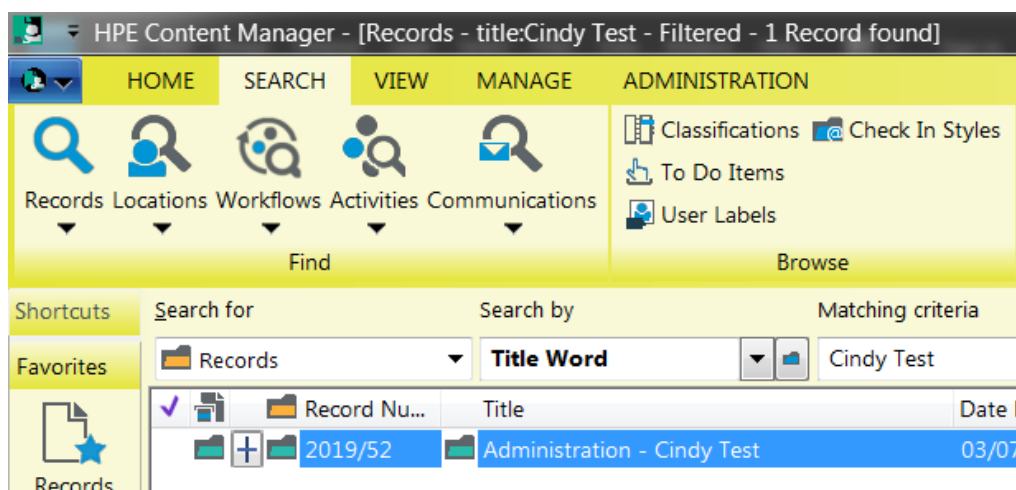
- Click **YES TO ALL**



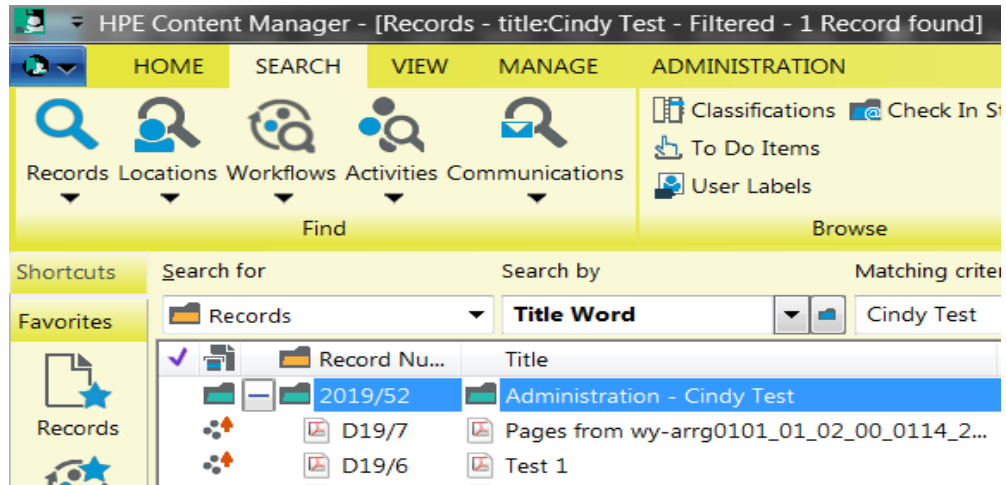
The documents have now been added to the folder.

If the user would like to verify that the documents are in the folder (optional):

- Re-run the **SEARCH** for the folder.
- In this example the search is for the **FOLDER** with the title "Cindy test".



- Then **EXPAND (+)** the folder entry, to see the contents.



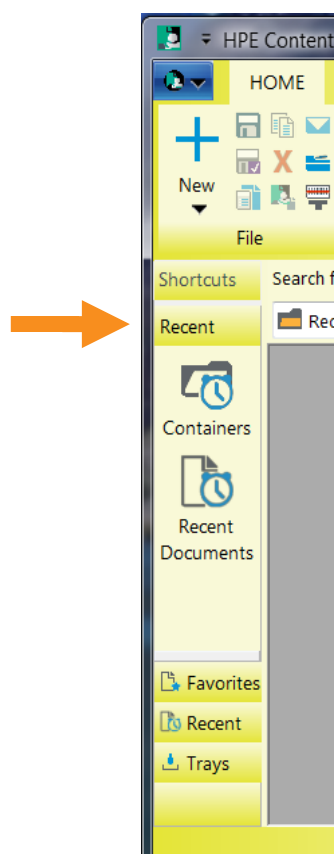
Searching for Documents and Containers

(See also training video linked to: <http://wyoarchives.state.wy.us/index.php/wyoming-digital-archives>.)



The Digital Archives has powerful search capabilities, ranging from simple one term searches up to complex multi-tiered searches which can be saved for future use. For instructions regarding complex multi-tiered searches, see the [Advanced User Instructions](#) below.

RECENTLY ADDED RECORDS

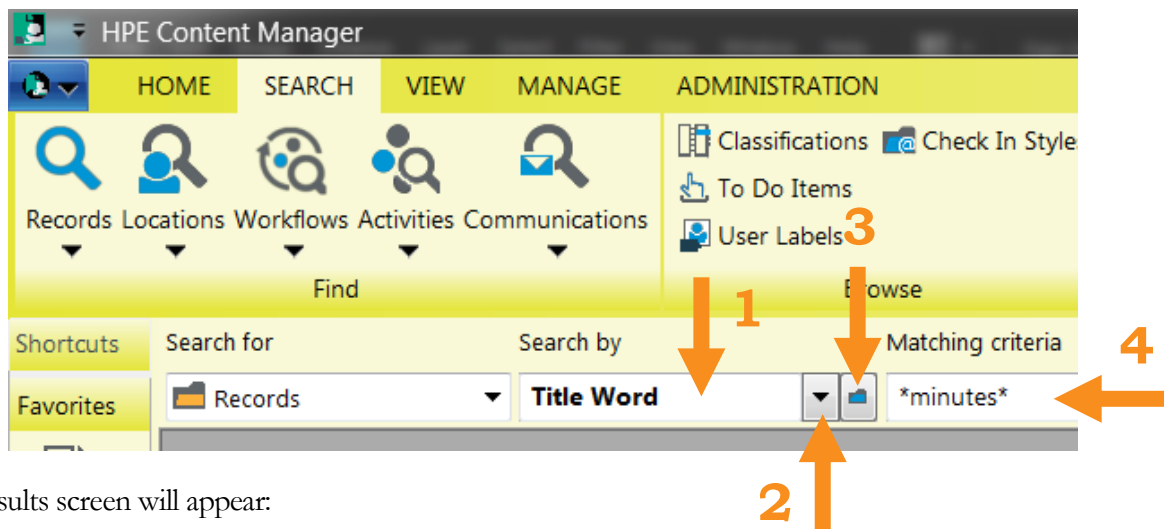
Users can quickly retrieve records which have recently been added to the Digital Archives by using the **CONTAINER** and **RECENT DOCUMENTS** icons on the **RECENT TOOL BAR** (right-side of the screen)



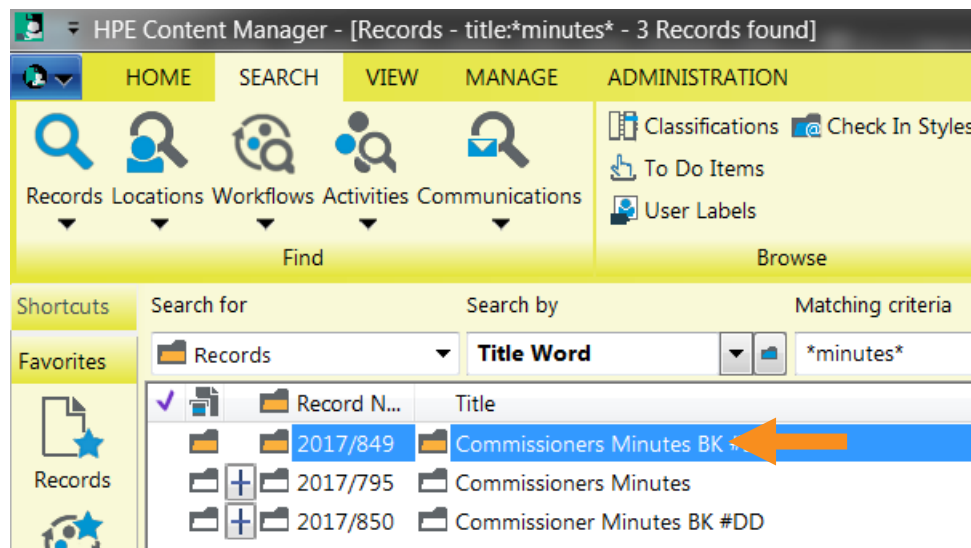
SIMPLE SEARCHES (using just **ONE** criteria):

- Select a **SEARCH CRITERIA** in the **SEARCH BY** option box.
- To see additional **SEARCH BY** choices, click the **DOWN ARROW** .
- For even more **SEARCH BY** alternatives, click the **BLUE FOLDER** icon  -which will provide a list of all search options-including any special data entry fields that may have been set up for the agency's records. (Note: two favorite choices are **TITLE WORD** and **DATE REGISTERED**.)
- Type a word/phrase in the **MATCHING CRITERIA** field.

(Note: the user may also want to put an **ASTERISK *** on each side of the word/phrase to get complete results---it serves as a **WILD CARD**.)



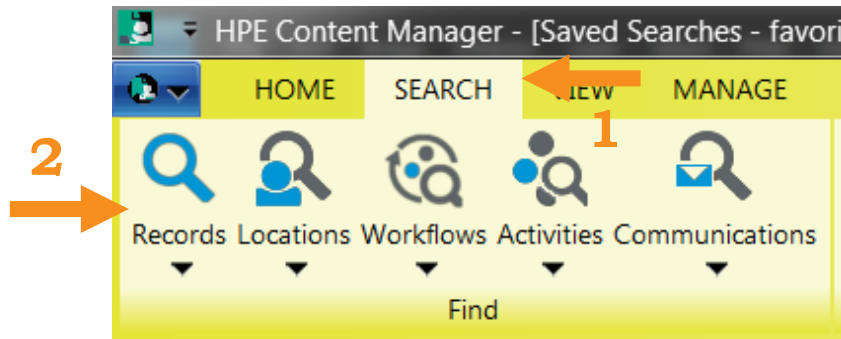
The results screen will appear:



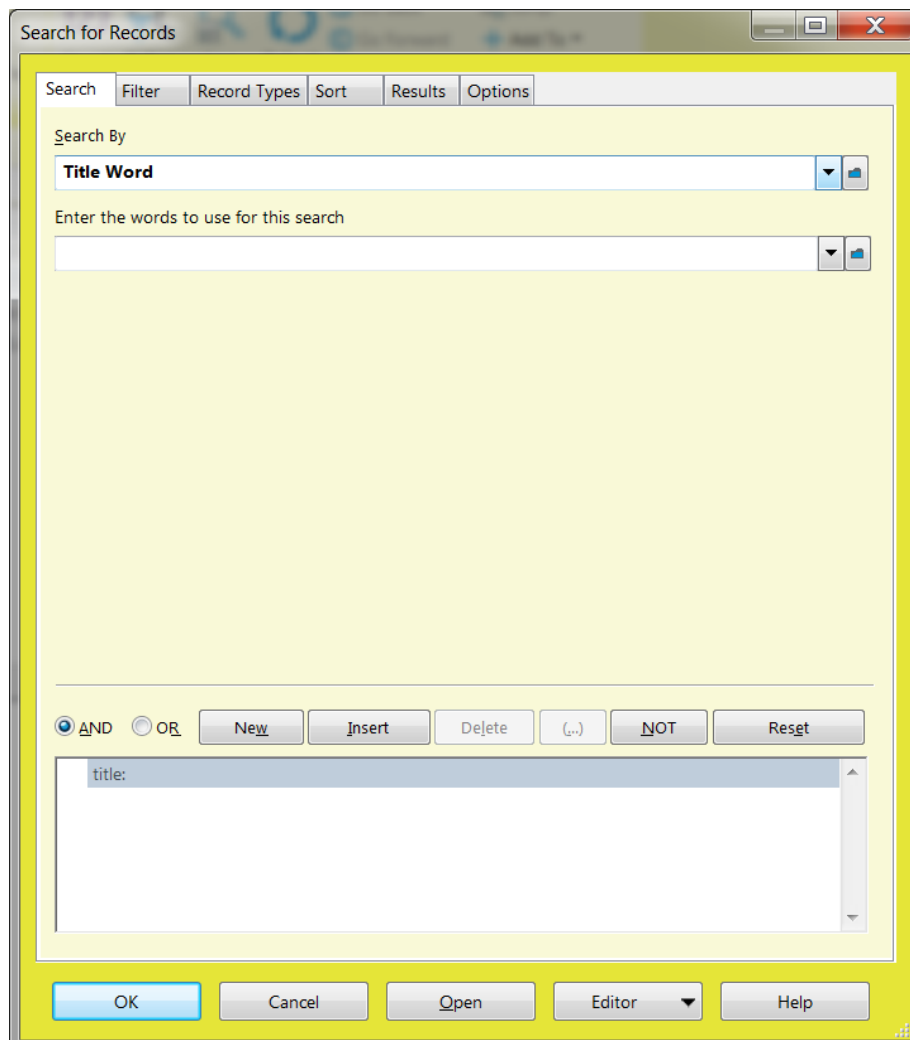
ANOTHER way to access the **SEARCH SCREEN** is to use one of the **FIND** icons:

- Click the **SEARCH** tab.

- Select the **SEARCH/RECORDS** icon .



The **SEARCH FOR RECORDS** screen will appear, which can be completed as needed:

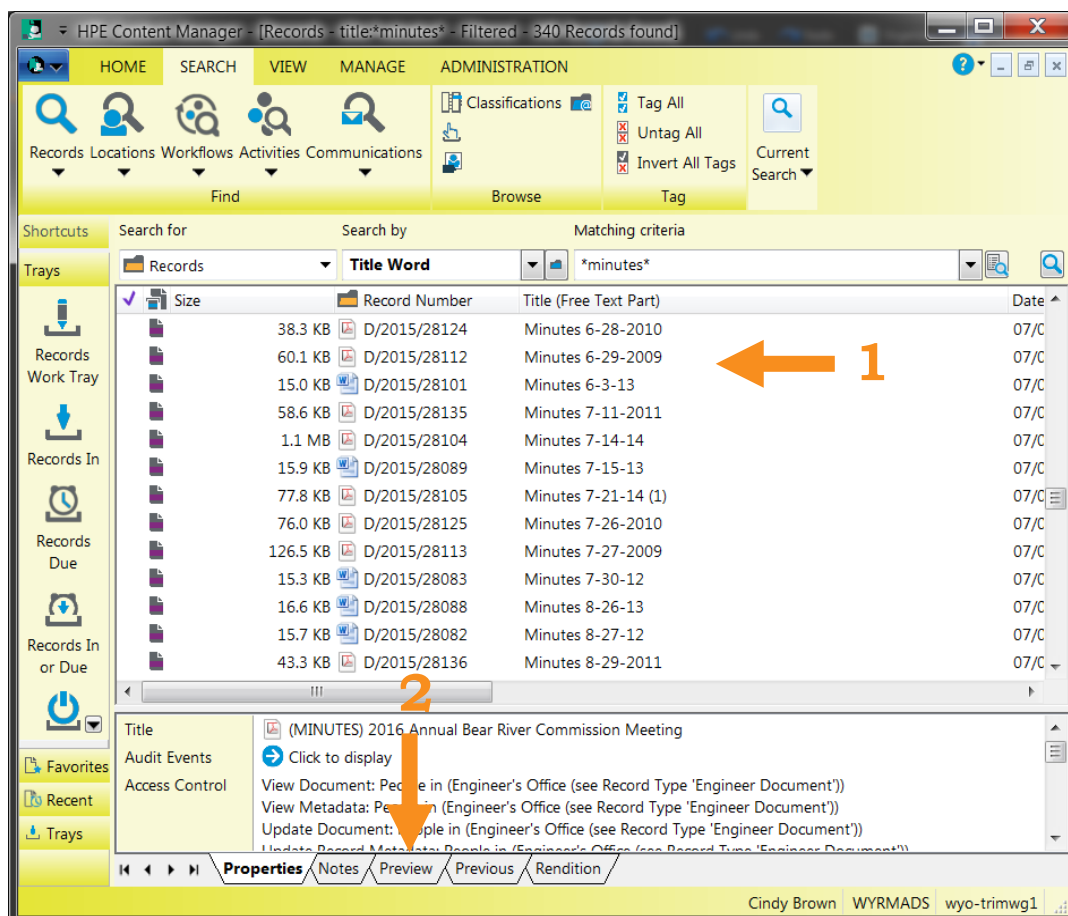
A screenshot of the 'Search for Records' dialog box. The dialog has a title bar with standard window controls. Below the title bar is a tabbed interface with tabs for Search, Filter, Record Types, Sort, Results, and Options. The 'Search' tab is active. It contains a 'Search By' dropdown menu set to 'Title Word'. Below this is a text input field with the placeholder 'Enter the words to use for this search'. At the bottom, there are radio buttons for 'AND' (selected) and 'OR'. To the right of these are buttons for 'New', 'Insert', 'Delete', '(...)', 'NOT', and 'Reset'. Below these buttons is a text area with the label 'title:'. At the very bottom of the dialog are buttons for 'OK', 'Cancel', 'Open', 'Editor', and 'Help'.

Viewing Documents

There are a couple of options for viewing documents added to the Digital Archives.

FOR A QUICK LOOK, THE DOCUMENTS CAN BE PREVIEWED. note: if the document is too large, the preview option may not be available ([see instructions for viewing below](#)) To preview the document:

- Select the **PERTINENT DOCUMENT**.
- Click the **PREVIEW** tab.



A preview of the document will appear on the bottom part of the screen. If the document has more than one page, thumbnails will also appear

- Double-Click on the **PERTINENT THUMBNAIL** to preview it.

The screenshot displays the HPE Content Manager web interface. The top navigation bar includes tabs for HOME, SEARCH, VIEW, MANAGE, and ADMINISTRATION. Below this is a toolbar with icons for Records, Locations, Workflows, Activities, and Communications, along with buttons for Classifications, Tag, and Current Search.

The main content area features a search bar with the following parameters:

- Search for: Records
- Search by: Title Word
- Matching criteria: *minutes*

A table of search results is shown below the search bar:

Size	Record Number	Title (Free Text Part)
38.3 KB	D/2015/28124	Minutes 6-28-2010
60.1 KB	D/2015/28112	Minutes 6-29-2009

Below the table, a document preview is displayed. The preview shows two pages of a document titled "STATE RECORDS COMMITTEE MEETING". The first page is labeled "Page 1" and the second page is labeled "Page 2". An orange arrow points to the "Page 1" thumbnail. The document content includes the following sections:

- STATE RECORDS COMMITTEE MEETING**
Wyoming Department of State Parks and Cultural Resources
State Archives
- MINUTES June 28th 2010**
- COMMITTEE MEMBERS IN ATTENDANCE:**
CHAIRMAN: Roger Joyce – Archives and Museum Manager
Ryan Schellhaas, Attorney General Office
Pam Robinson, CPA, Public Funds Manager, Dept of Audit
- OTHERS IN ATTENDANCE:**
Curtis Greshel – Archives and Micrographics Supervisor
Mack Browne – Records Analyst
Pat Newbern – Records Analyst
Lisa Hastings – Records Analyst/Recorder
Brian Martin – Guest – Wyoming Tribune Eagle
- Roger called the meeting to order at 2:10 p.m.
- Ryan moved that the minutes of the State Records Committee meeting held on May 2010 be approved. Pam seconded. Motion approved.

The bottom of the interface shows a navigation bar with buttons for Properties, Notes, Preview (selected), Previous, and Rendition. The user's name, Cindy Brown, and the system name, WYRMADS, are displayed in the bottom right corner.

THE DOCUMENTS CAN ALSO BE VIEWED. To view the document:

Double-Click on the **PERTINENT DOCUMENT**.

HPE Content Manager - [Records - title:*minutes* - Filtered - 340 Records ...]

HOME SEARCH VIEW MANAGE ADMINISTRATION

Records Locations Workflows Activities Communications

Find Browse

Classifications Tag Current Search

Shortcuts

Trays

Records Work Tray

Records In

Records Due

Records

Favorites

Recent

Trays

Search for: Records

Search by: Title Word

Matching criteria: *minutes*

Size	Record Number	Title (Free Text Part)
38.3 KB	D/2015/28111	Minutes 6-28-2010
60.1 KB	D/2015/28112	Minutes 6-29-2009
15.0 KB	D/2015/28101	Minutes 6-3-13
58.6 KB	D/2015/28135	Minutes 7-11-2011
1.1 MB	D/2015/28104	Minutes 7-14-14
15.9 KB	D/2015/28089	Minutes 7-15-13
77.8 KB	D/2015/28105	Minutes 7-21-14 (1)
76.0 KB	D/2015/28125	Minutes 7-26-2010
126.5 KB	D/2015/28113	Minutes 7-27-2009

Record Number: D/2015/28089

Security: Access with Permission

Classification: Governance and Compliance - Governance - Minutes, Resolutions, and Ordinances

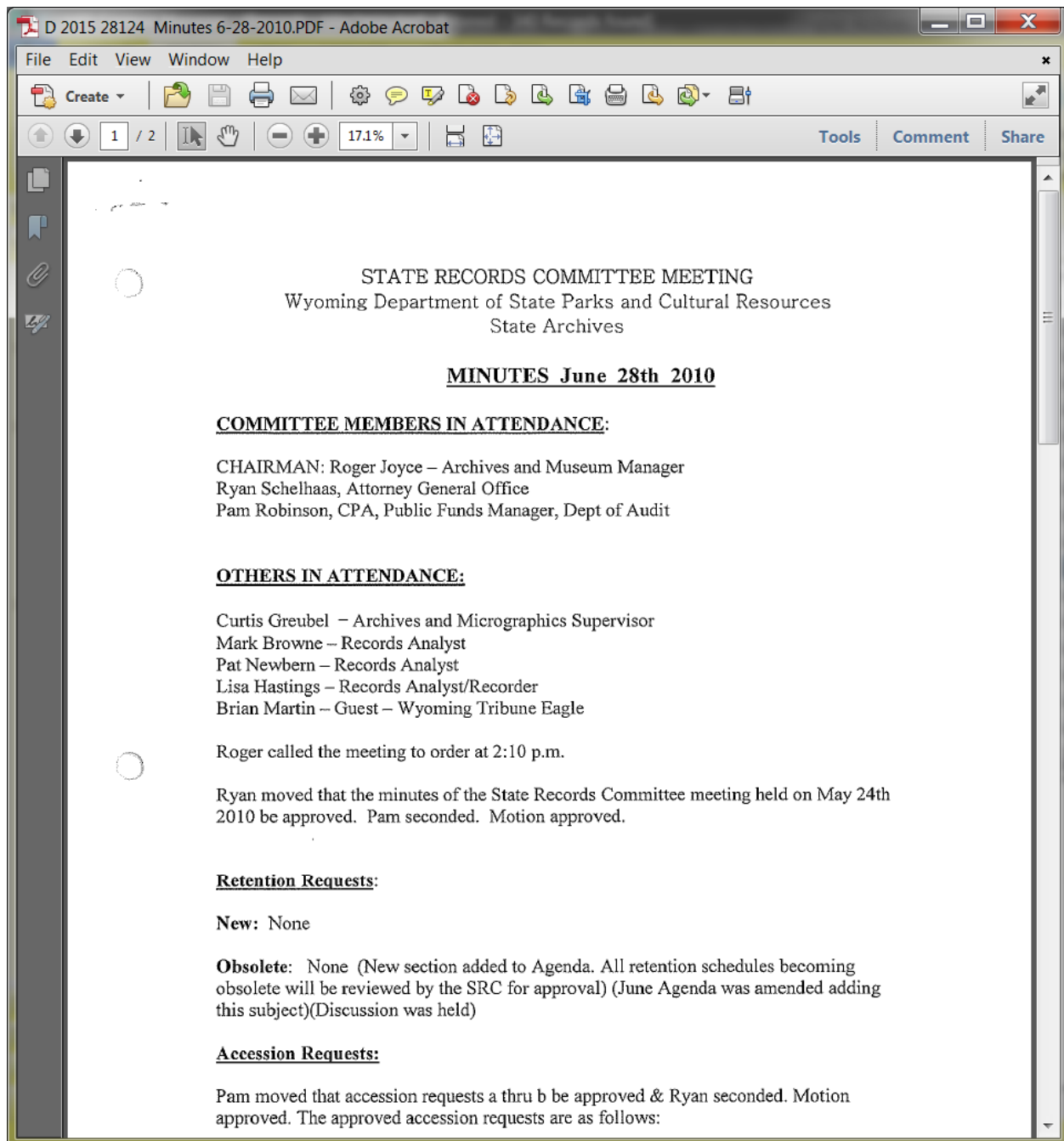
Container: 2014/1: State Records Committee Meeting Minutes

Retention schedule: GAC-GOV-03 Minutes and Agendas

Properties Notes Preview Previous Rendition

Cindy Brown WYRMADS

Depending on the format of the document, it may open in its original software (Acrobat, MS Word, etc). If it is not in one of the "standardized" format, it will open in the Digital Archives document viewer



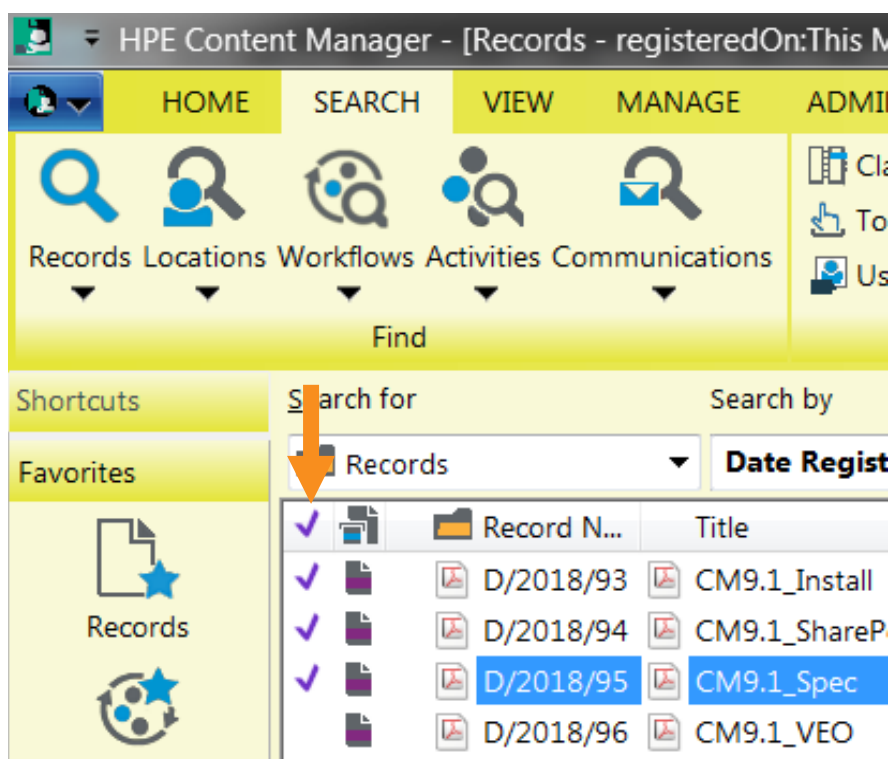
Copying Documents

(See also training video linked to: <http://wyoarchives.state.wy.us/index.php/wyoming-digital-archives>.)

SUPERCOPYING allows an agency to save copies of one or multiple Digital Archives documents to a user specified location on their computer.

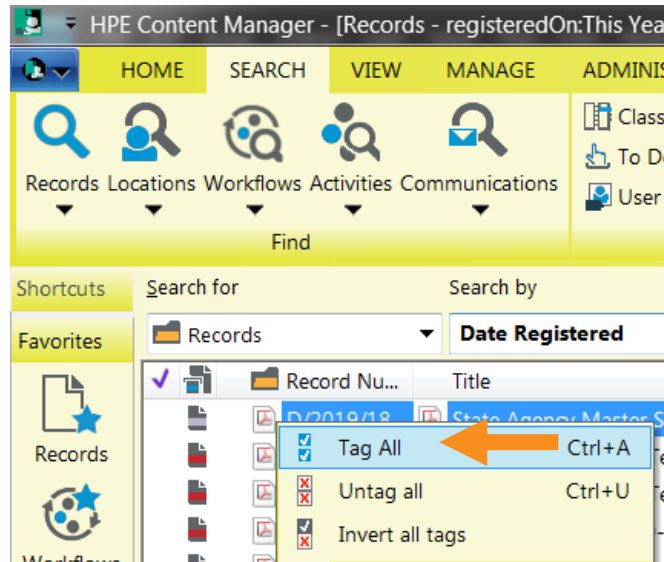
To **SUPERCOPY**:

- Select/Tag ✓ the **PERTINENT DOCUMENTS**, by clicking in the **FIRST COLUMN**.

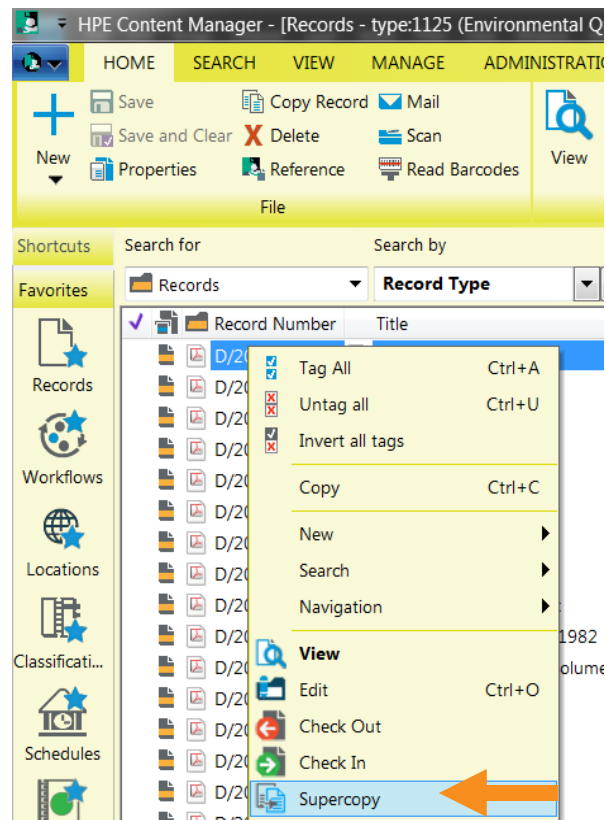


Or: to Select/Tag  **ALL** the **DOCUMENTS** on the screen:

- **RIGHT-CLICK** on anyone of the documents.
- Select **TAG ALL**.

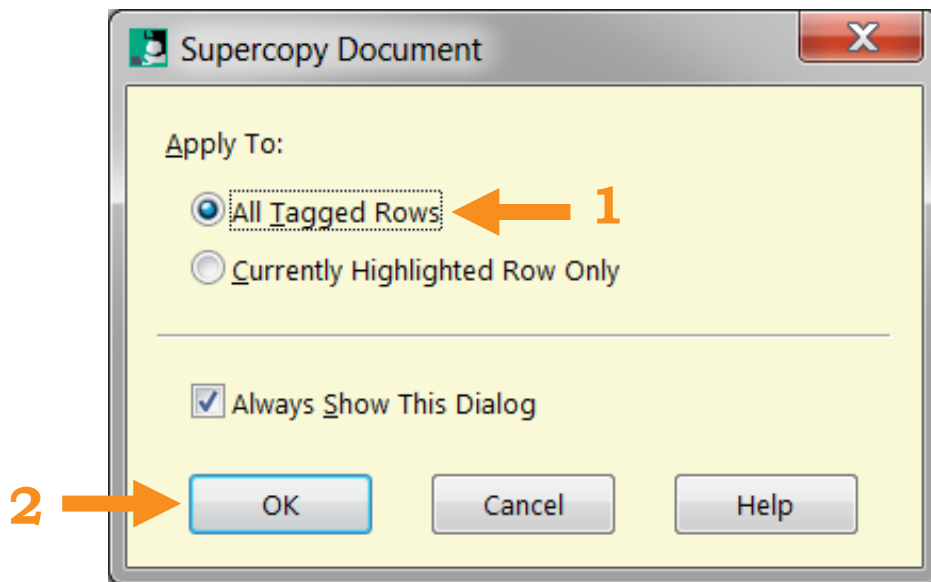


- Select **SUPERCOPY** (to copy the tagged documents).




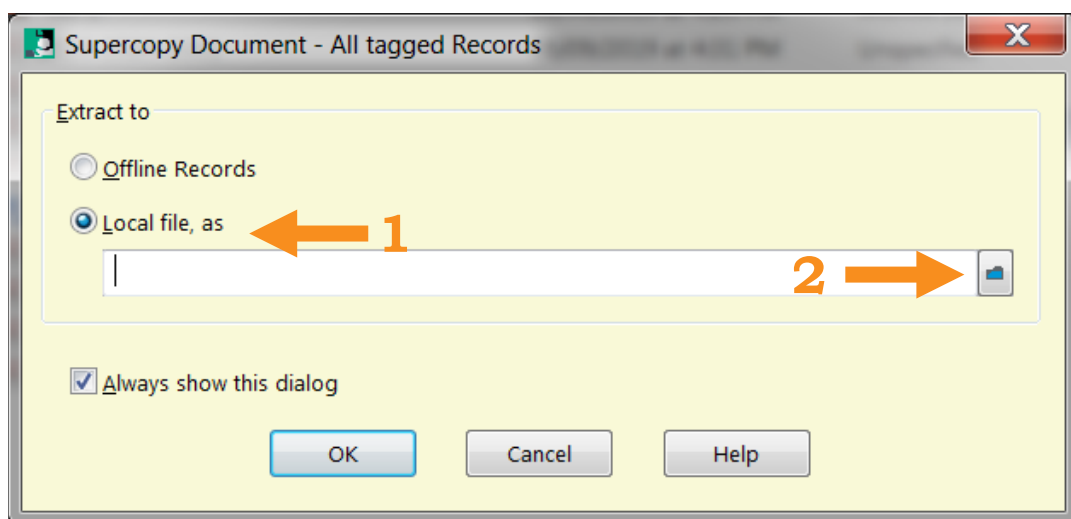
The **SUPERCOPY DOCUMENT** screen will appear.

- Select the **ALL TAGGED ROWS** button.
- Then click **OK**.



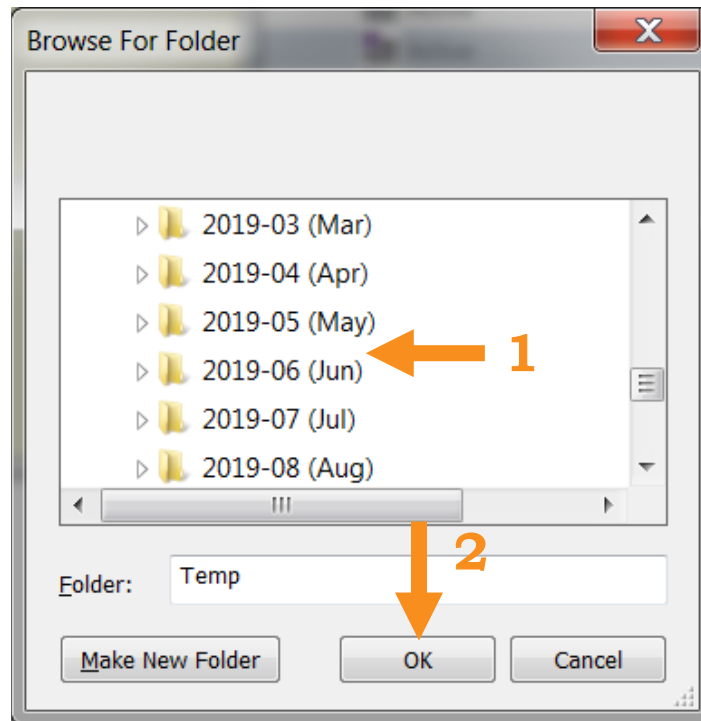
The **SUPERCOPY DOCUMENT - ALL TAGGED RECORDS** screen will appear. To **SAVE** a **COPY** of the documents to network folder:

- Select/Toggle the **LOCAL FILE, AS** circle.
- Click the **BLUE FOLDER** icon  to select where the copy of the documents should be saved.



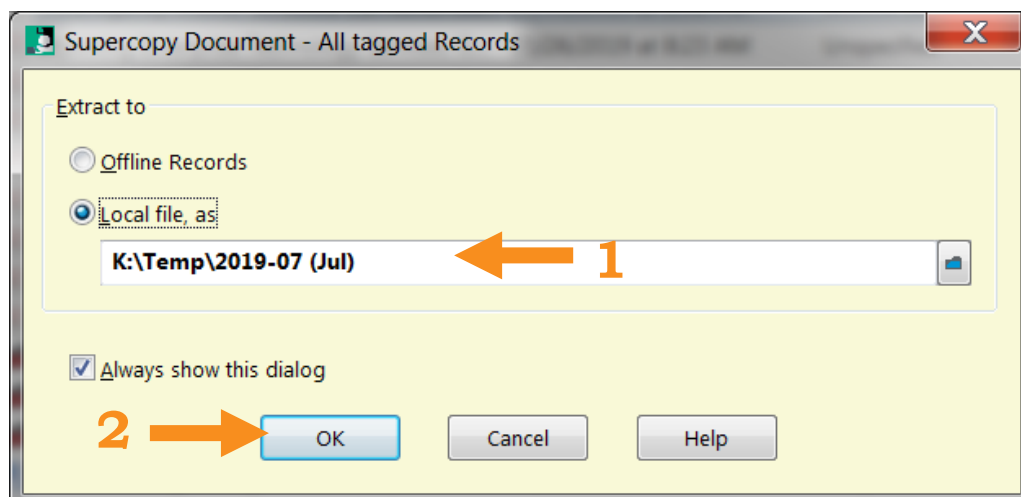
The **BROWSE FOR FOLDER** screen will appear: (note for the Remote Server Users, finding the user's network folder can be tricky, try scrolling down and expanding **THIS COMPUTER**):

- Select/Highlight the **PERTINENT FOLDER**.
- Click **OK**.



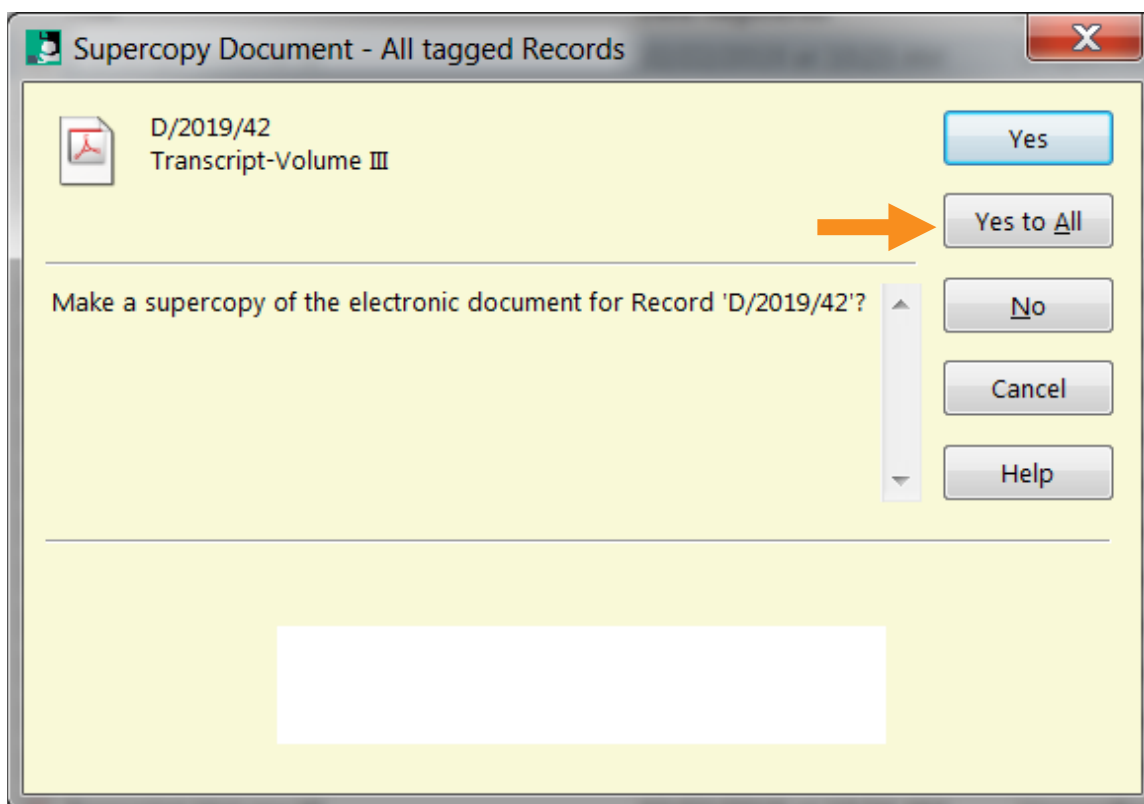
The **SUPERCOPY DOCUMENT - ALL TAGGED ROWS** screen will reappear:

- The **LOCAL FILE, AS** field is completed.
- Click **OK**.



The **SUPERCOPY DOCUMENT - ALL TAGGED RECORDS** screen will appear:

- Select **YES TO ALL**.



Copies of the documents have now been saved (**SUPERCOPIED**) to the designated network folder. The "original" documents are still stored in the Digital Archives.

If the agency has trouble "supercopying" their documents, the State Archives staff is available to assist.

APPENDICES: (FIRST TIME USER INSTRUCTIONS)

- 5.1 [Logging into the Remote User Server - First Time \(Authenticator App\)](#)
- 5.2 [Logging in the Remote User Server - First Time \(Wyo-Portal\)](#)
- 5.3 [Logging into the Remote User Server - First Time \(Digital Archives RDP\)](#)
- 5.4 [Adding Documents - First Time \(Creating A Document Queue\)](#)

Logging into the Remote User Server: First Time Instructions - Authenticator

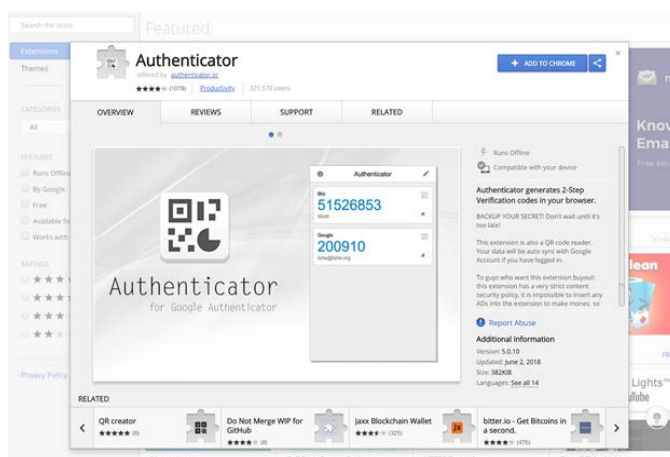
A few preliminary steps need to be taken the **first time** an agency attempts to access the Digital Archives remote user server. Before proceeding:

- The assigned agency staff will obtain their **USER NAME** and **PASSWORD** from ETS
- ETS will also provide a **TOKEN (QR CODE)**

The agency will need to load either the **GOOGLE AUTHENTICATOR MOBILE APP** (iOS or Android) or an **AUTHENTICATOR APP** from the Chrome Web Store:

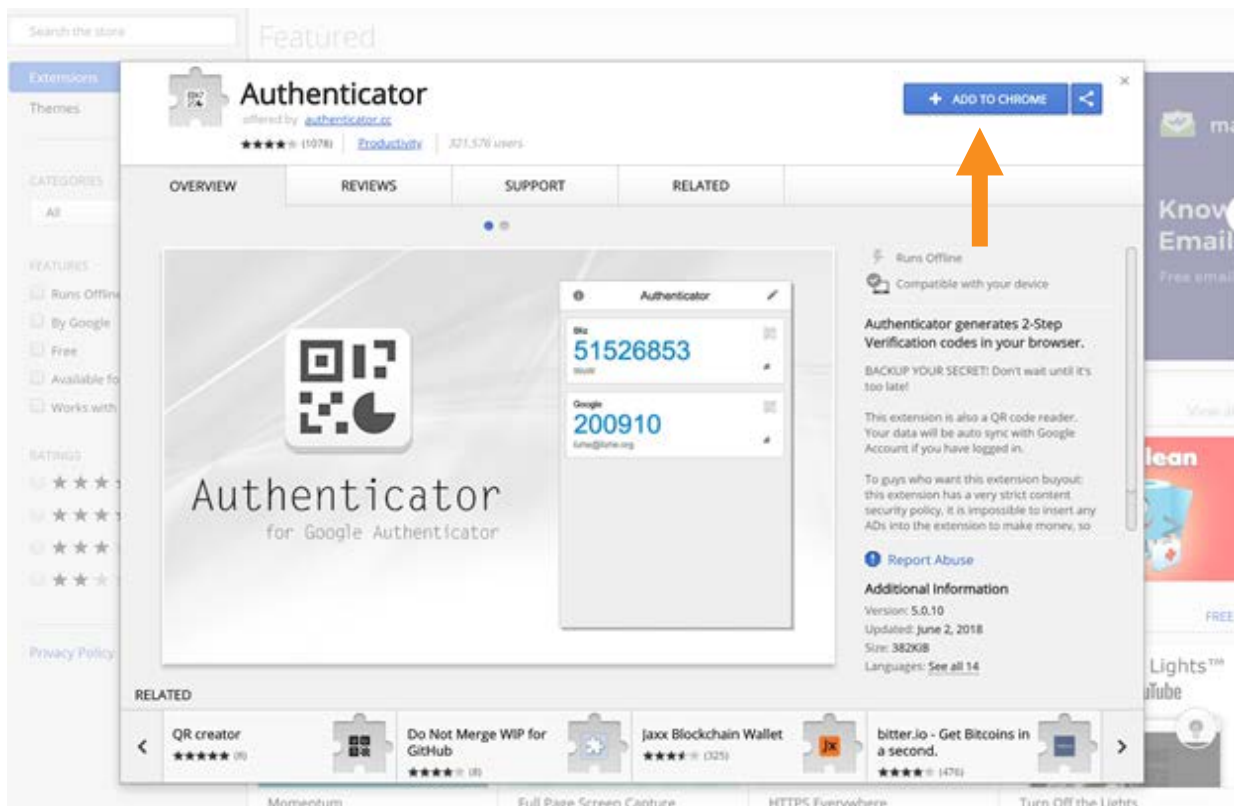
- Make sure that the Chrome browser is installed and used for this process.
- With Chrome open, use the following Chrome Web Store page:
<https://chrome.google.com/webstore/detail/authenticator/bhghoamapcdpbohphigoooaddi-npkbai?hl=en>

The **AUTHENTICATOR** screen will appear:



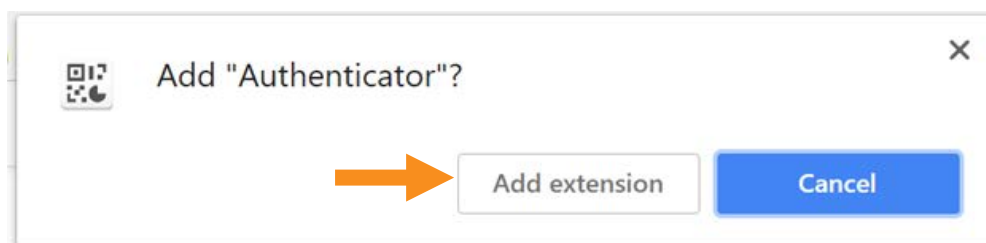
To install **AUTHENTICATOR**:

- Select the **ADD TO CHROME** button




The **ADD "AUTHENTICATOR"?** screen will appear:

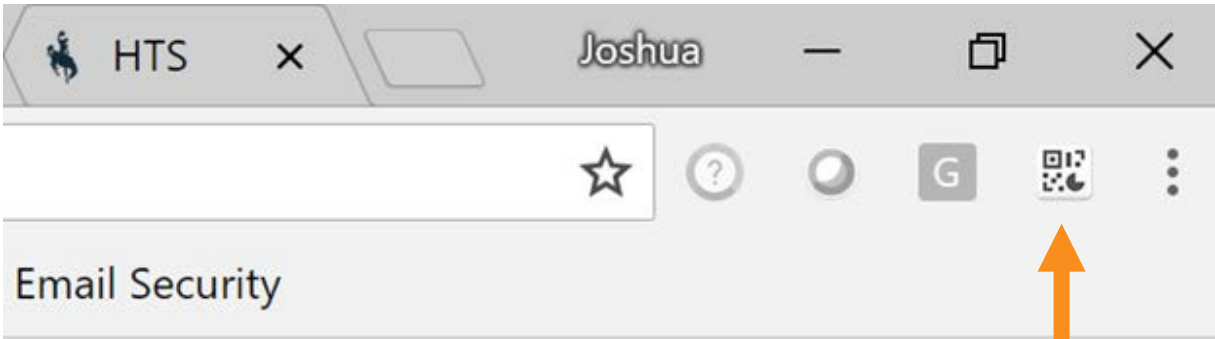
- Click **ADD EXTENSION** to finish installing the Browser App.



When the extension has finished installing, a new web page will open.

- Close the new web page.
- Close the installation window for the Web Store App (Extension).

The **AUTHENTICATOR ICON**  will appear near the upper right hand corner of the Chrome Browser bar




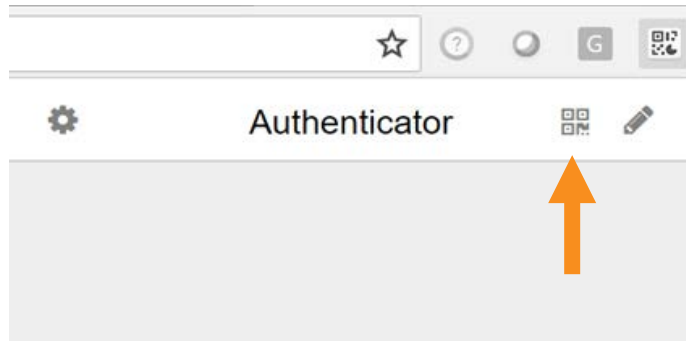
Open the e-mail message from ETS with a token (QR Code) similar to the one below. There are two methods to link the token (QR code) to the Authenticator app:

- Clicking on the **TOKEN(QR CODE)**
- Or entering the **CODE** listed below the token.




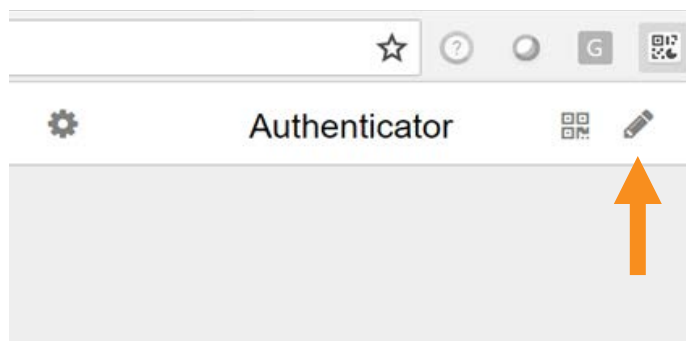
To use the **TOKEN (QR CODE)**:

- Select the **AUTHENTICATOR ICON**  in Chrome
- Click and drag a box around the **TOKEN (QR CODE)** to link it in Authenticator.



To **ENTER THE CODE**:

- Copy the **TEXT BELOW** the **TOKEN (QR CODE)**.
- Select the **PENCIL ICON**  .

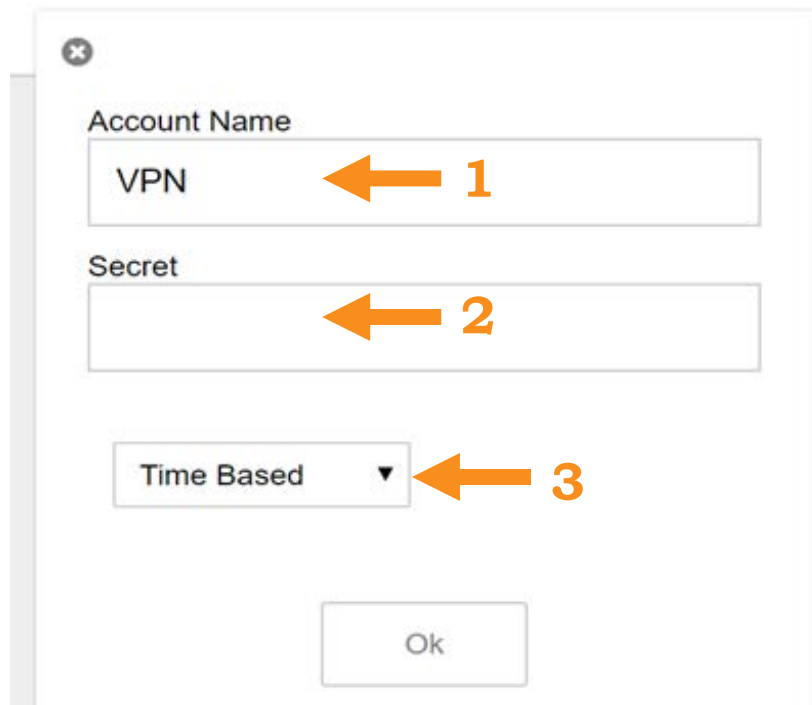


The **+ ICON** will appear:

- Select the **+ ICON**
- Click **MANUAL ENTRY**

The **ACCOUNT ENTRY FORM** will appear on the screen:

- Complete the **ACCOUNT NAME** field(for example VPN or Portal).
- Paste the **TEXT COPIED FROM THE TOKEN (QR CODE)** in the **SECRET** field.
- Leave **TIME BASED** in the drop down box
- Click **OK**



The screenshot shows a dialog box titled 'Account Entry Form' with a close button (X) in the top left corner. It contains three input fields and one button. The first field is labeled 'Account Name' and contains the text 'VPN'. An orange arrow with the number '1' points to this field. The second field is labeled 'Secret' and is empty. An orange arrow with the number '2' points to this field. The third field is a dropdown menu currently showing 'Time Based'. An orange arrow with the number '3' points to this dropdown. At the bottom of the dialog is an 'Ok' button.

The Authenticator app is now set up and ready to use as part of the wyo-portal log in.

Logging into the Remote User Server: First Time Instructions - Wyo-Portal

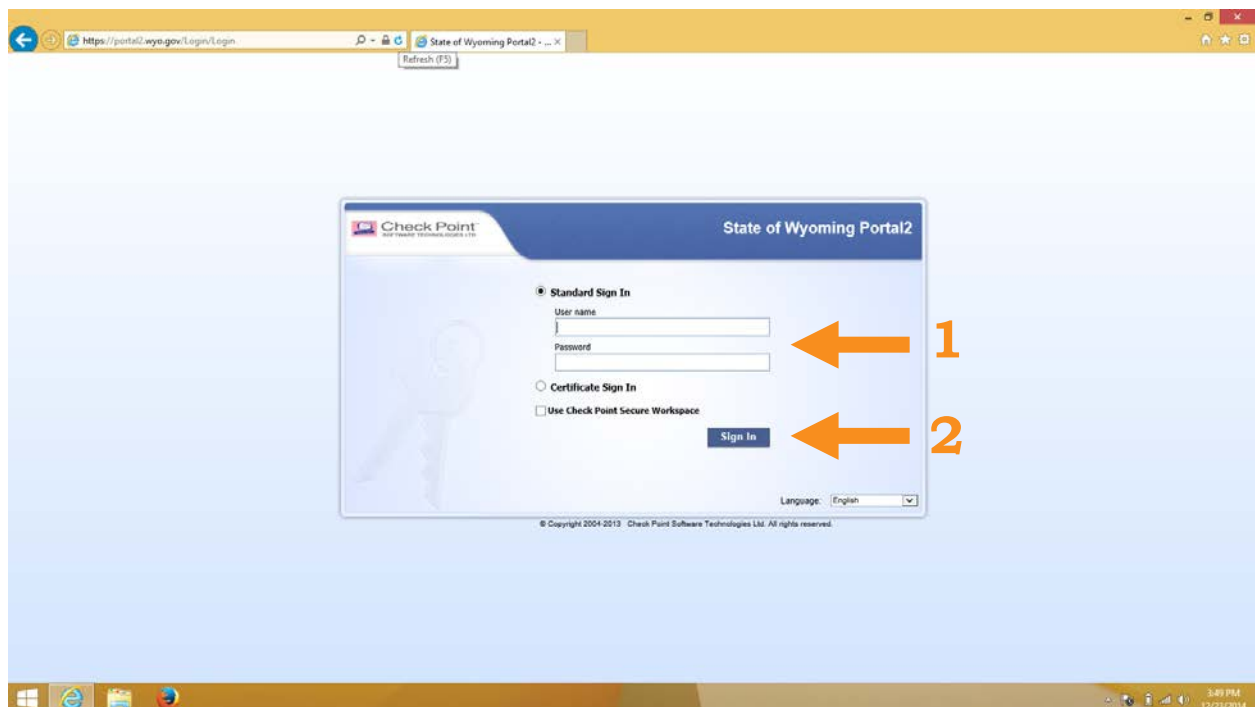
(Note: in preparation, the computer's JAVA may need to updated) Using an internet browser, open <https://portal2.wyo.gov>

The State of Wyoming Portal2 screen will appear:

- Login with the user name and password provided by ETS

(Note: *wyo*/does not need to be added to the user name - just the user name)

- Select **SIGN-IN**

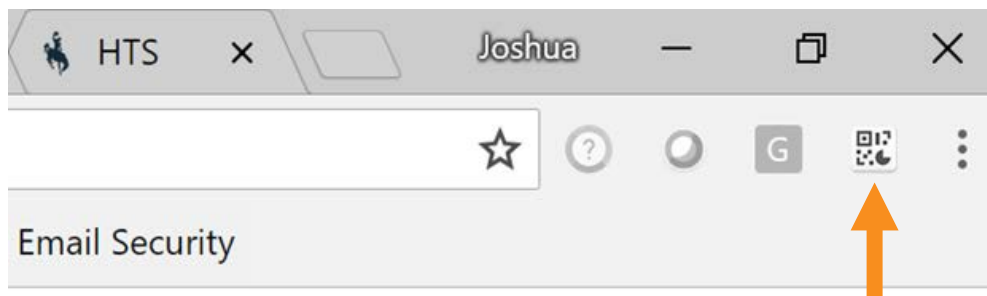


The **MESSAGE CHALLENGE** screen will appear. It is requiring the code from the Authenticator app.



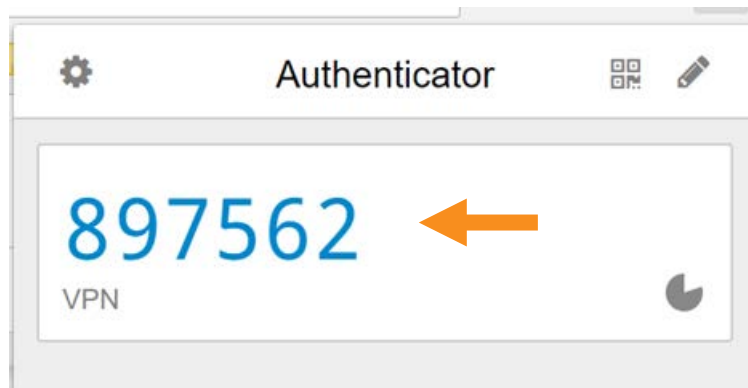
To obtain a code:

- Open **CHROME**
- Click on the **AUTHENTICATOR ICON** , (near the upper right-hand corner of the browser).



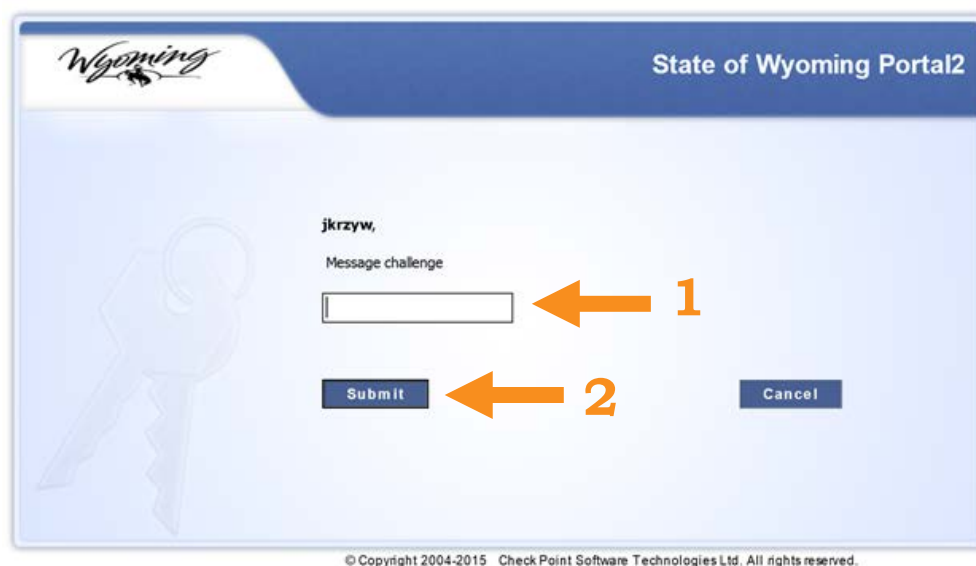
The **CODE SCREEN** will appear:

- Click on the number
- Note: if it's the first time the app has been used, Chrome will ask for permission to the app, click OK.
- Click on the code to copy it.



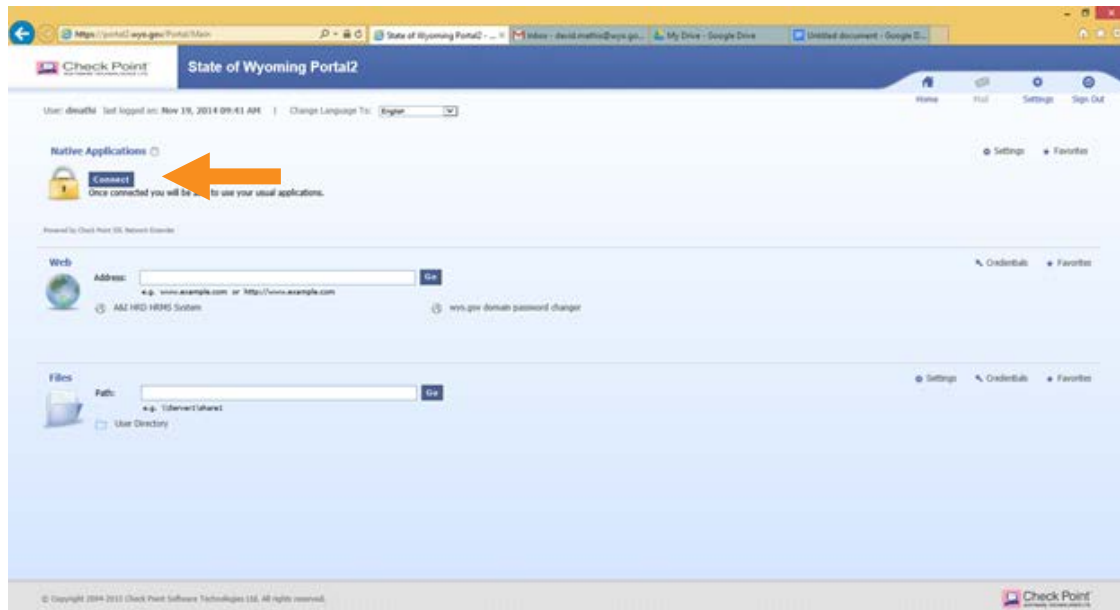
To continue logging into the **WYO-PORTAL**:

- Return to the **MESSAGE CHALLENGE** screen:
- Paste the **AUTHENTICATOR CODE** into the message challenge box.
- Select **SUBMIT**



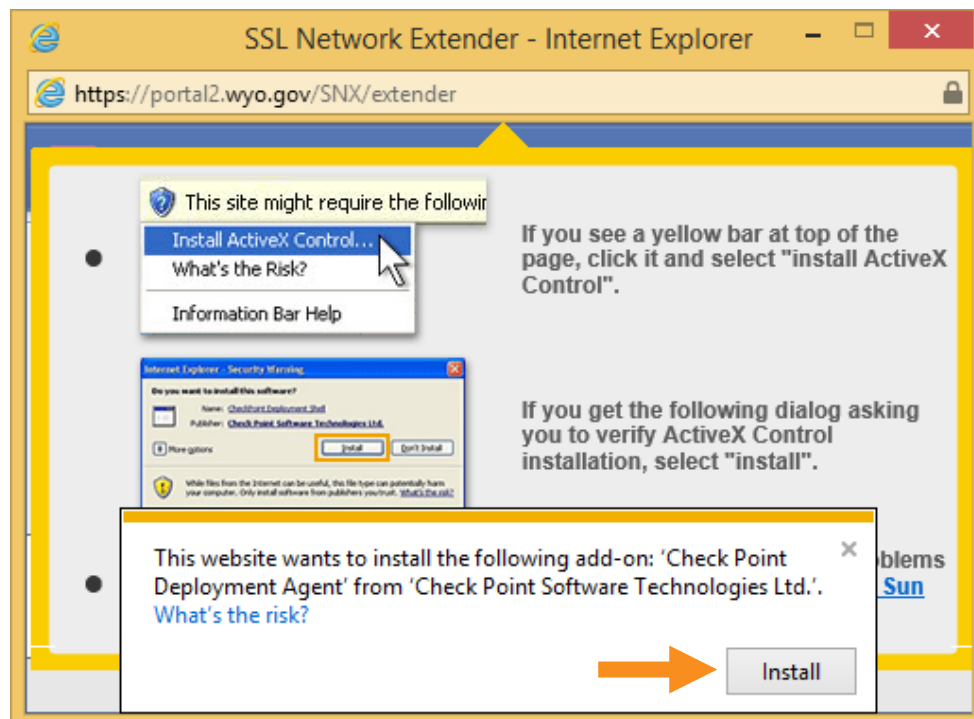
The **WYO-PORTAL** screen will appear:

- Select **CONNECT**.



If this is the first time using portal2.wyo.gov; the **SSL NETWORK EXTENDER** screen will appear. The user will be prompted to install the mobile client **CHECK POINT DEPLOYMENT AGENT**. It will need to be installed in order to connect to the Remote User Server:

- Click **INSTALL**.

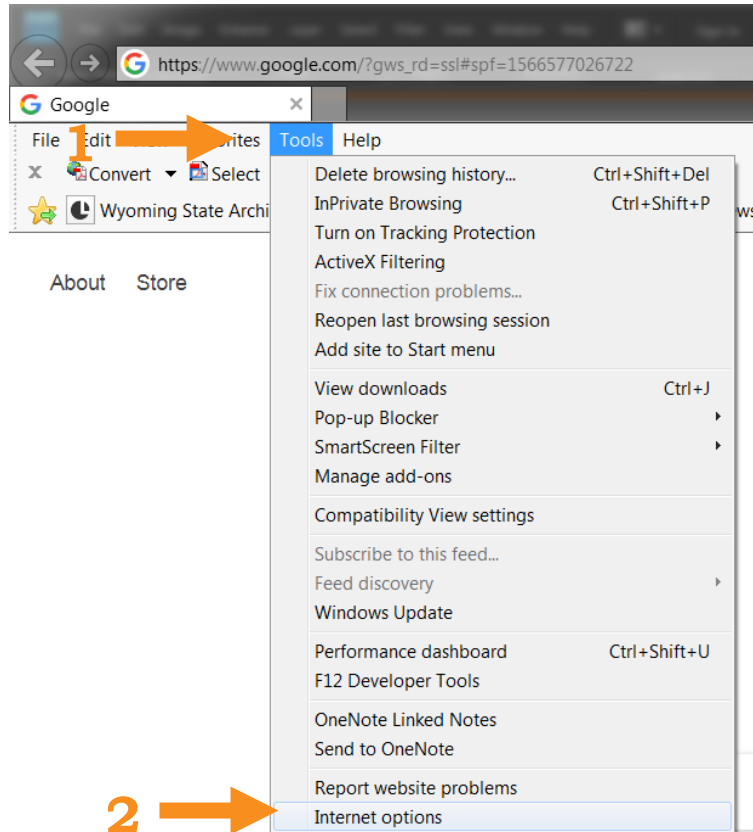


A prompt may appear regarding the ENHANCED PROTECTION MODE:

- Click **RUN CONTROL**

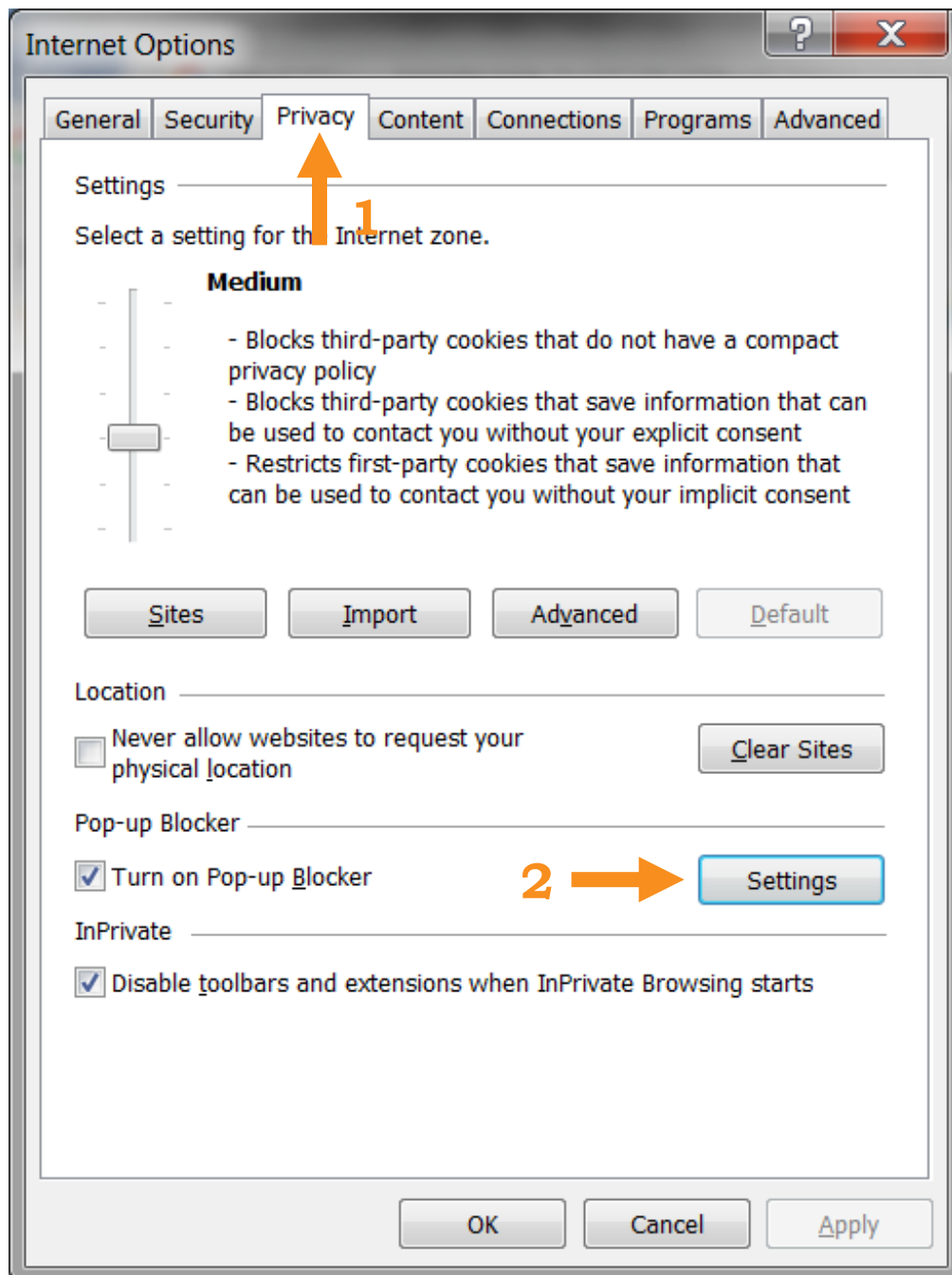


Then the user may need to allow the popup, for this site only. To edit the setting in Internet Explorer click, **TOOLS/INTERNET OPTIONS**



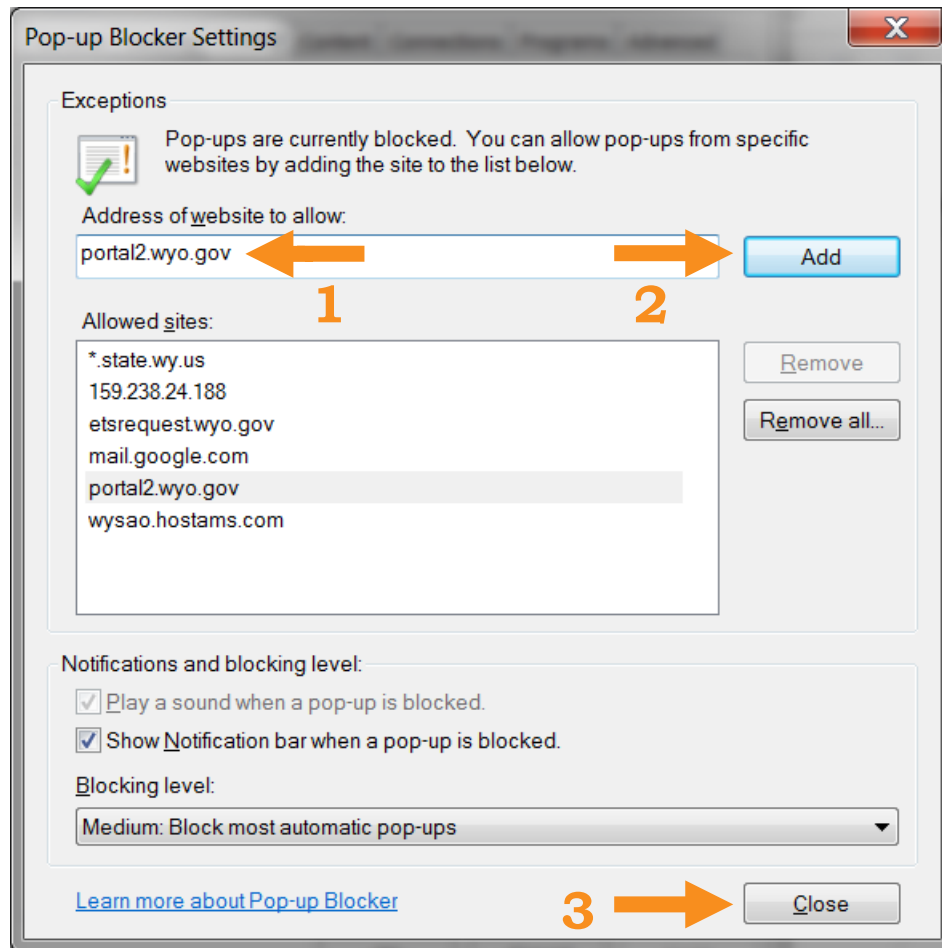
The **INTERNET OPTIONS** screen will appear:

- Under the **PRIVACY** tab
- Click the **SETTINGS** button



The **POP-UP BLOCKER SETTINGS** screen will appear:

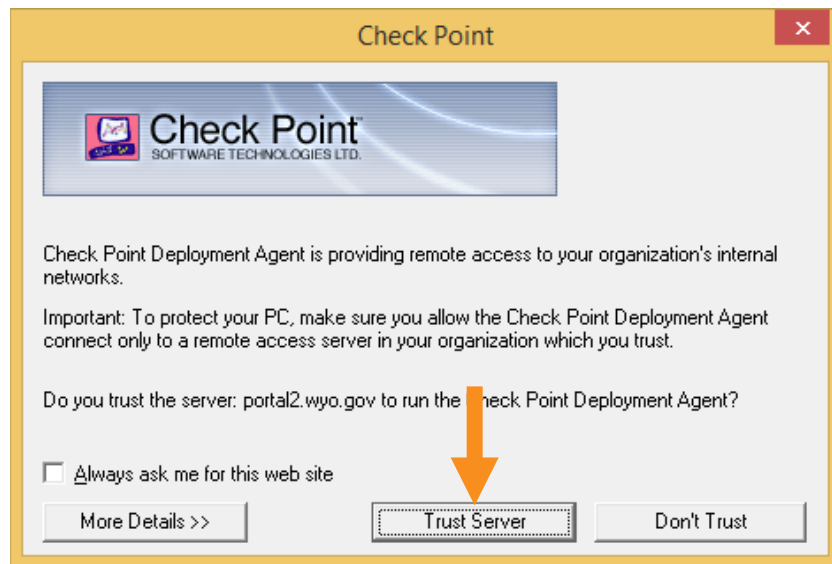
- Type **portal2wy.gov** in the **ADDRESS OF WEBSITE TO ALLOW** box
- Select **ADD**
- Click **CLOSE**



Click **OK**.

The **CHECKPOINT** screen will appear

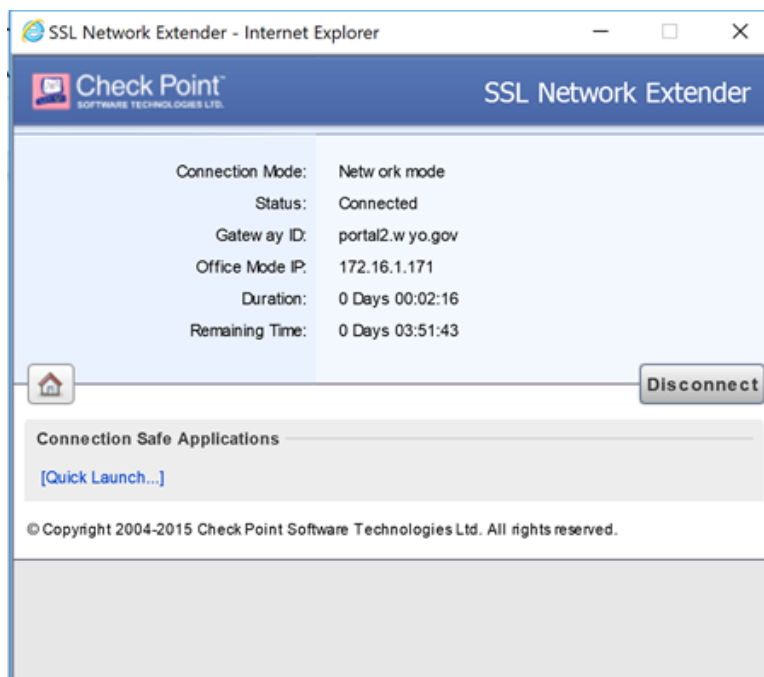
- Click **TRUST SERVER**



If prompted again:


- Select **ALLOW CHECK POINT NETWORK EXTENDER TO MAKE CHANGES.**

The SSL NETWORK EXTENDER screen will appear



The user is now logged into the wyo-portal. See next section to access the Digital Archives Remote User Server

Logging into the Remote User Server: First Time Instructions - Digital Archives RDP

The State Archives staff will e-mail an rdp(remote desktop connection) link :

- Download the **RDP LINK**
- Save the **RDP LINK** to the computer's **DESKTOP**
- Double-click on the **RDP LINK**

The **WINDOWS SECURITY SCREEN** will appear. Since it's the first time the user has logged into the Digital Archives:

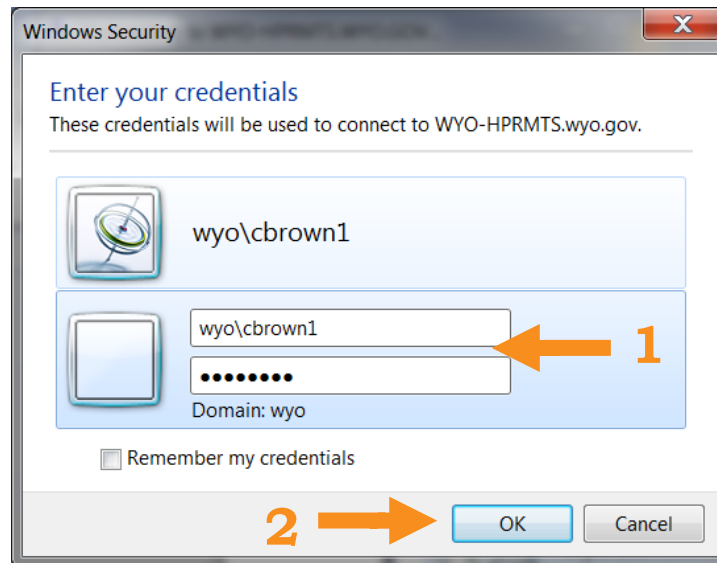
- Select **USE ANOTHER ACCOUNT**



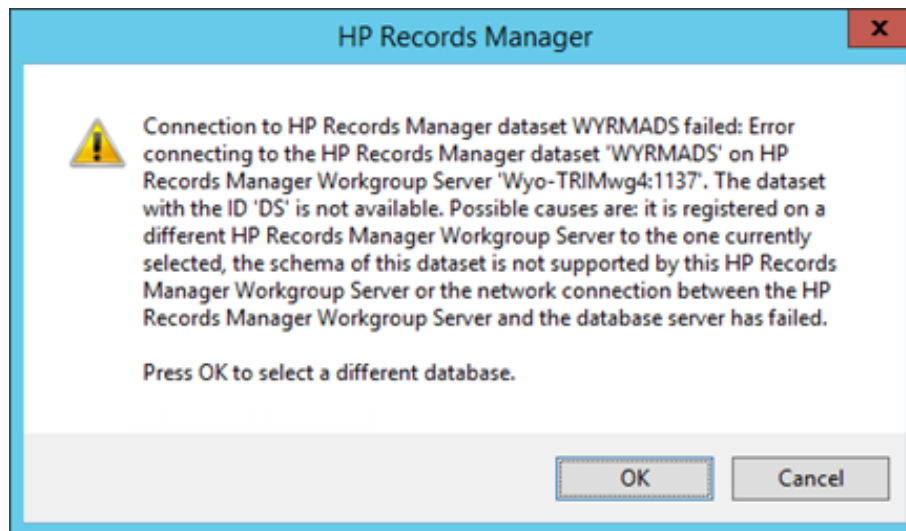
The use another account fields are now available:

Type in the **USER NAME** (the user name must start with **wyo**) and **PASSWORD**.

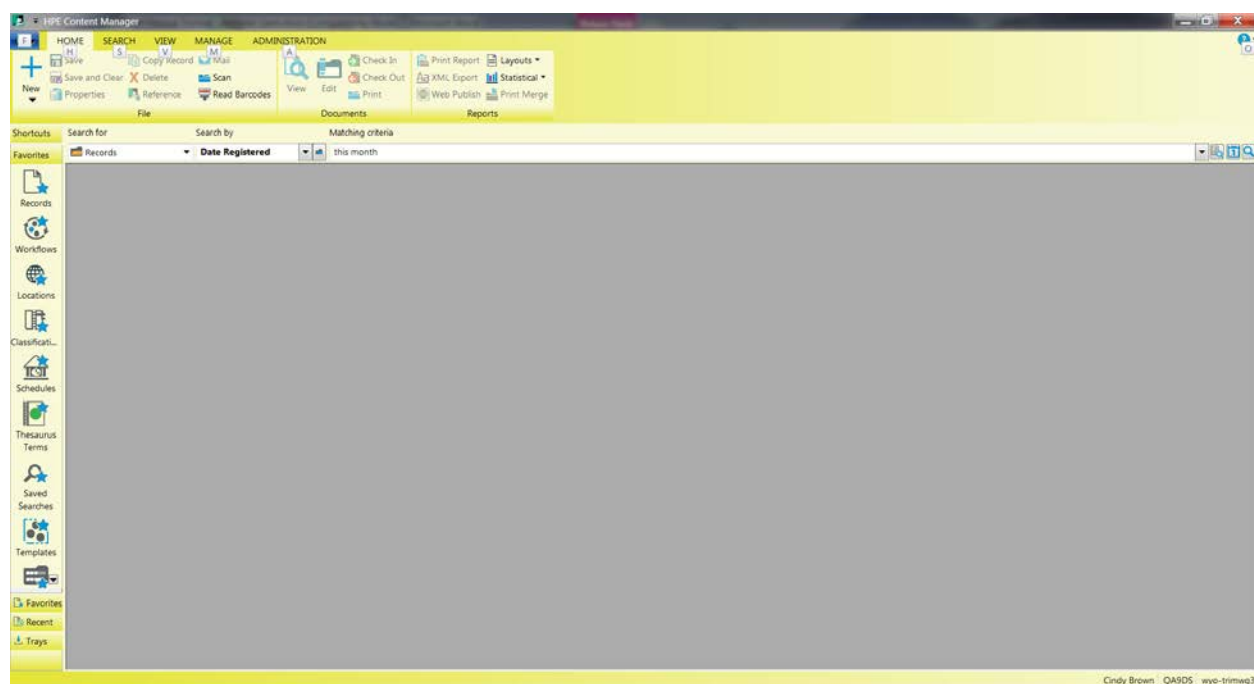
Click **OK**



Note: After clicking **OK**, don't be surprised if the error screen below appears. It generally shows up the first time users access the server. It means that the user is actually logged into the Digital Archives Remote Server, but the correct dataset will need to be selected. This will be taken care of during the initial training session. For further details ([see instructions for dataset selection](#)).



Otherwise, here is the opening Wyoming Digital Archives screen:




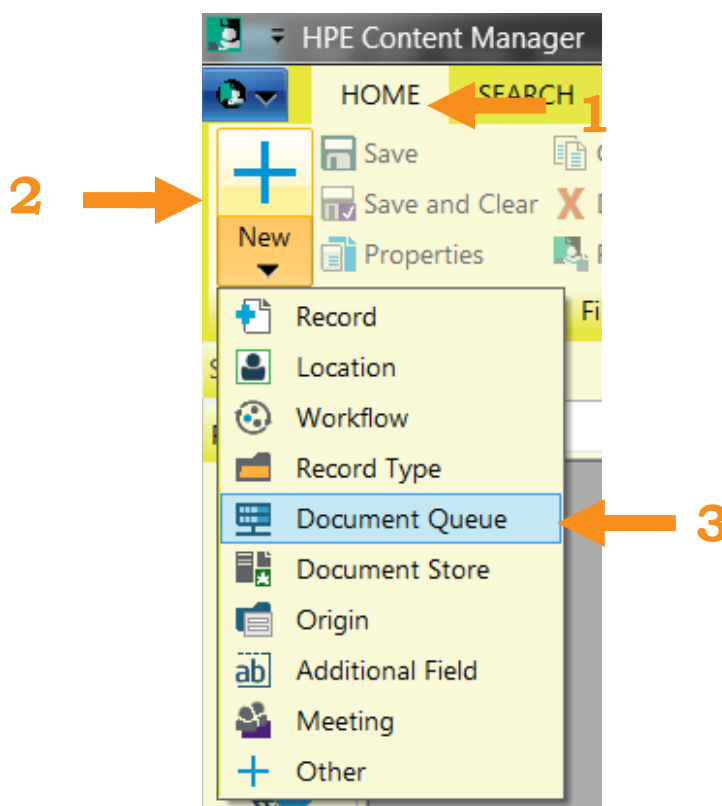
And this is the bottom right-hand corner showing the user name:



Adding Documents: First Time Instructions - Creating A Document Queue

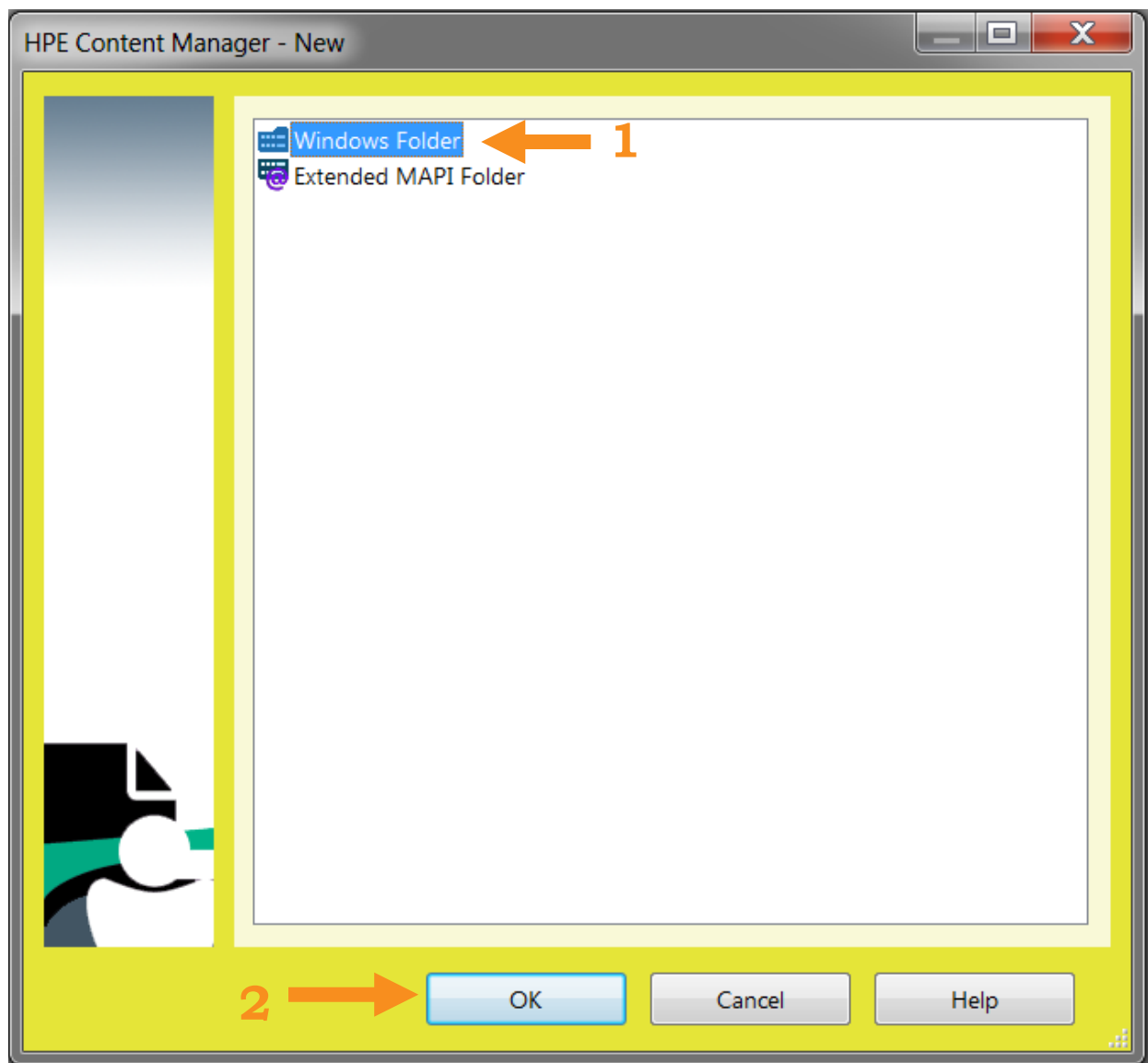
The State Archives staff can assist with setting up a Document Queue. If the user would rather create the document queue:

- Under the **HOME** tab, Click **NEW (DROP DOWN ARROW)** .
- Select **DOCUMENT QUEUE**.




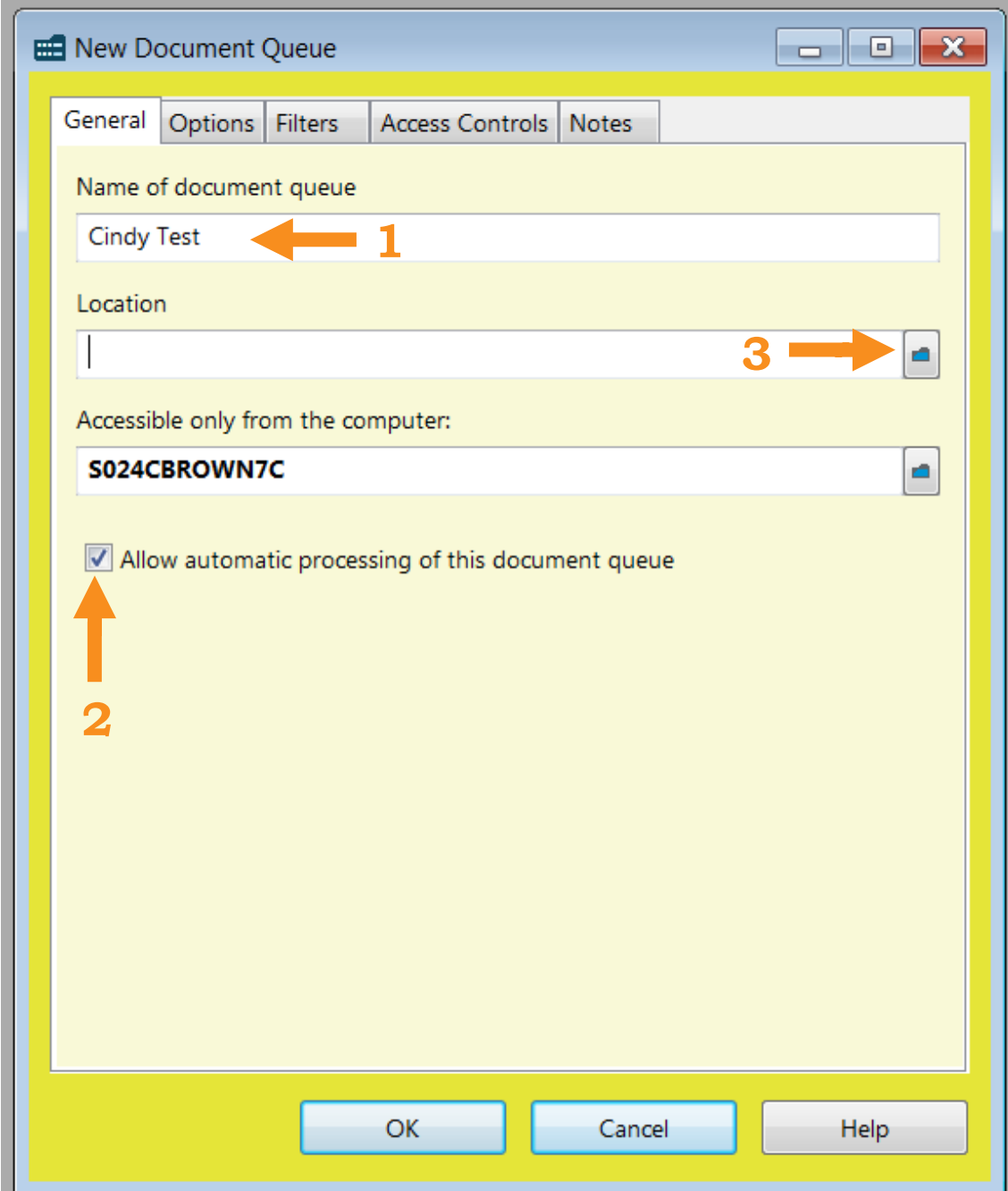
The **HPE CONTENT MANAGER - NEW** screen will appear:

- Highlight/Select **WINDOWS FOLDER**.
- Click **OK**.



The **NEW DOCUMENT QUEUE** screen will appear:

- Type in a **DOCUMENT QUEUE NAME**.
- Then toggle/click on **ALLOW AUTOMATIC PROCESSING OF THE DOCUMENT QUEUE** box (to help save a few steps).
- To select where the queue folder is located on the user's computer/network click on the **BLUE FOLDER ICON** .



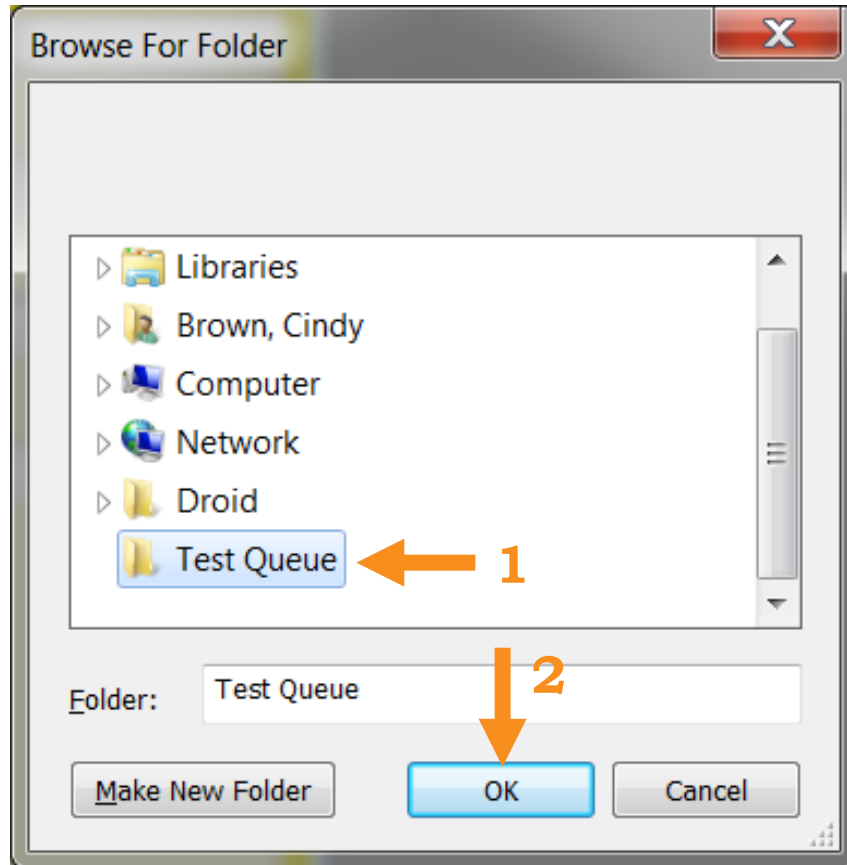
The screenshot shows the 'New Document Queue' dialog box with the following fields and annotations:

- Name of document queue:** A text box containing 'Cindy Test'. An orange arrow labeled '1' points to this text box.
- Location:** A text box with a vertical line cursor. An orange arrow labeled '3' points to a blue folder icon button to the right of the text box.
- Accessible only from the computer:** A text box containing 'S024CBROWN7C'. A blue folder icon button is to its right.
- Allow automatic processing of this document queue:** A checkbox that is checked. An orange arrow labeled '2' points to this checkbox.


At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

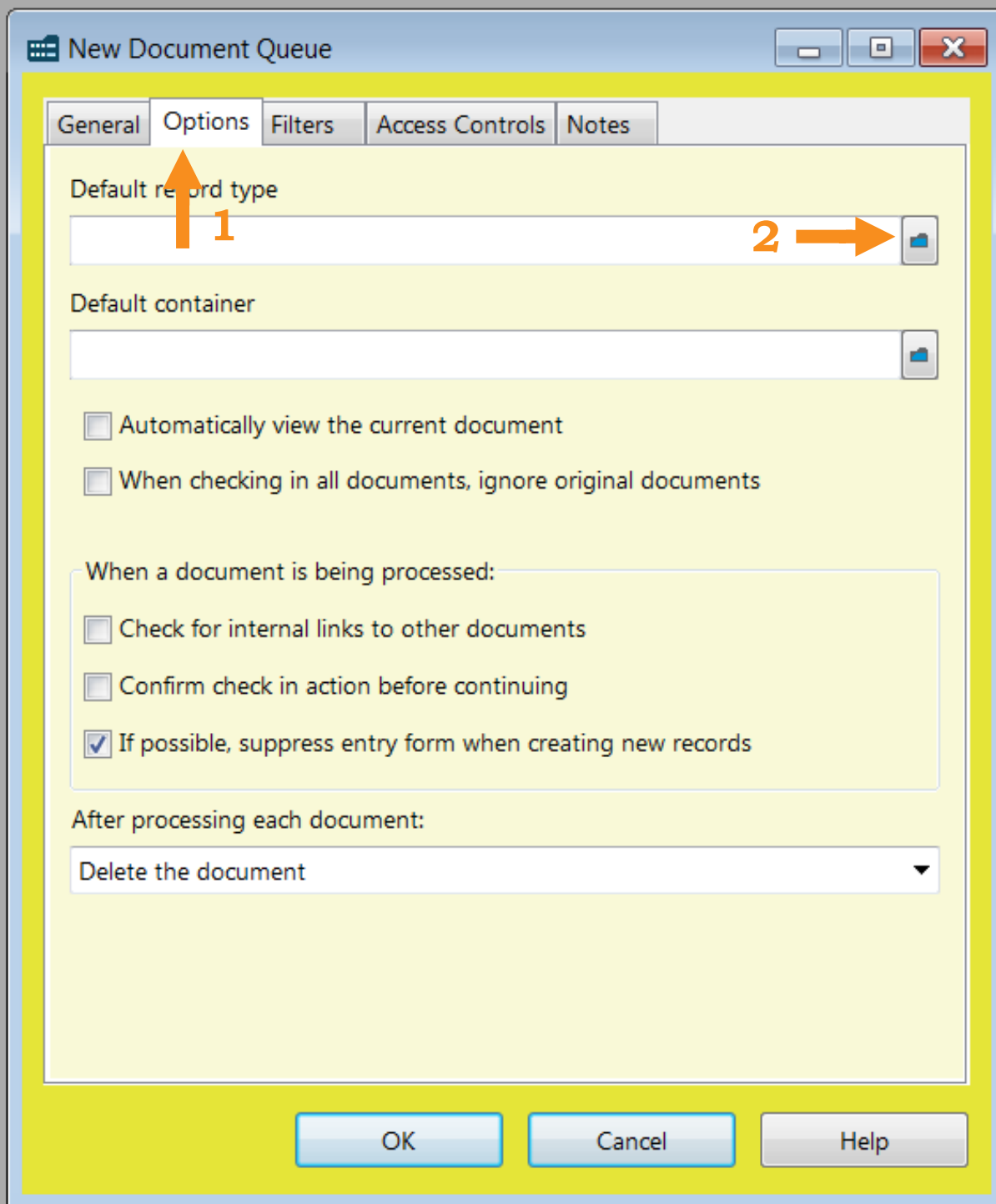
The **BROWSE FOR FOLDER** screen will appear:

- Browse for and locate the **FOLDER**.
- Highlight/Select the **FOLDER**.
- Click **OK**.



The **NEW DOCUMENT QUEUE** screen will reappear:

- Select the **OPTIONS** tab.
- To select a **DEFAULT RECORD TYPE** click on the **BLUE FOLDER ICON** . (Note: if the field is left blank, the system will ask the user to select a type for **EVERY** document added.)



The screenshot shows the 'New Document Queue' dialog box with the 'Options' tab selected. The dialog has a yellow background and a blue title bar. The 'Options' tab is highlighted among 'General', 'Filters', 'Access Controls', and 'Notes'. The 'Default record type' field is empty, with an orange arrow labeled '1' pointing to it. To the right of this field is a blue folder icon, with an orange arrow labeled '2' pointing to it. Below this is the 'Default container' field, also empty, with a blue folder icon to its right. There are two unchecked checkboxes: 'Automatically view the current document' and 'When checking in all documents, ignore original documents'. A section titled 'When a document is being processed:' contains three checkboxes: 'Check for internal links to other documents' (unchecked), 'Confirm check in action before continuing' (unchecked), and 'If possible, suppress entry form when creating new records' (checked). At the bottom, the 'After processing each document:' section has a dropdown menu currently set to 'Delete the document'. The dialog has 'OK', 'Cancel', and 'Help' buttons at the bottom.

New Document Queue

General Options Filters Access Controls Notes

Default record type

1

2

Default container

☐ Automatically view the current document

☐ When checking in all documents, ignore original documents

When a document is being processed:

☐ Check for internal links to other documents

☐ Confirm check in action before continuing

☒ If possible, suppress entry form when creating new records

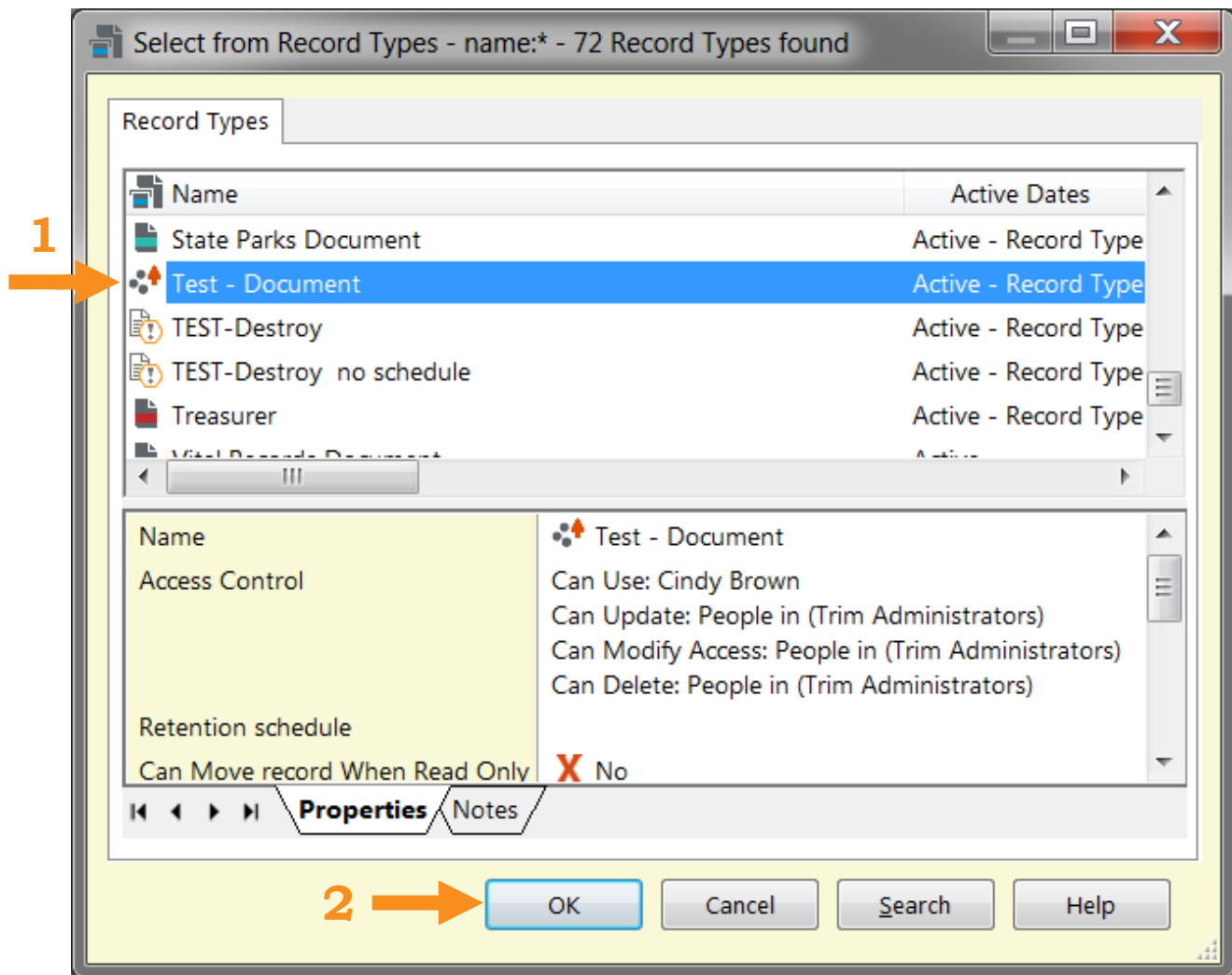
After processing each document:

Delete the document

OK Cancel Help

The **SELECT FROM RECORD TYPES** screen will appear:

- Select/Highlight the pertinent **RECORD TYPE**.
- Click **OK**.



The **NEW DOCUMENT QUEUE** screen will appear:

- Toggle/Check **IF POSSIBLE, SUPPRESS ENTRY FORM WHEN CREATING NEW RECORDS** box (the rest of the boxes should remain **un-toggled/un-checked**).
- Under the **AFTER PROCESSING EACH DOCUMENT** drop down list, select **DELETE THE DOCUMENT**. This will clear the queue for the next use/help avoid duplicates - the document will be **deleted** from the user's folder on the computer when the queue is processed).

New Document Queue

General Options Filters Access Controls Notes

Default record type
Test - Document

Default container

☐ Automatically view the current document

☐ When checking in all documents, ignore original documents

When a document is being processed:

☐ Check for internal links to other documents

☐ Confirm check in action before continuing

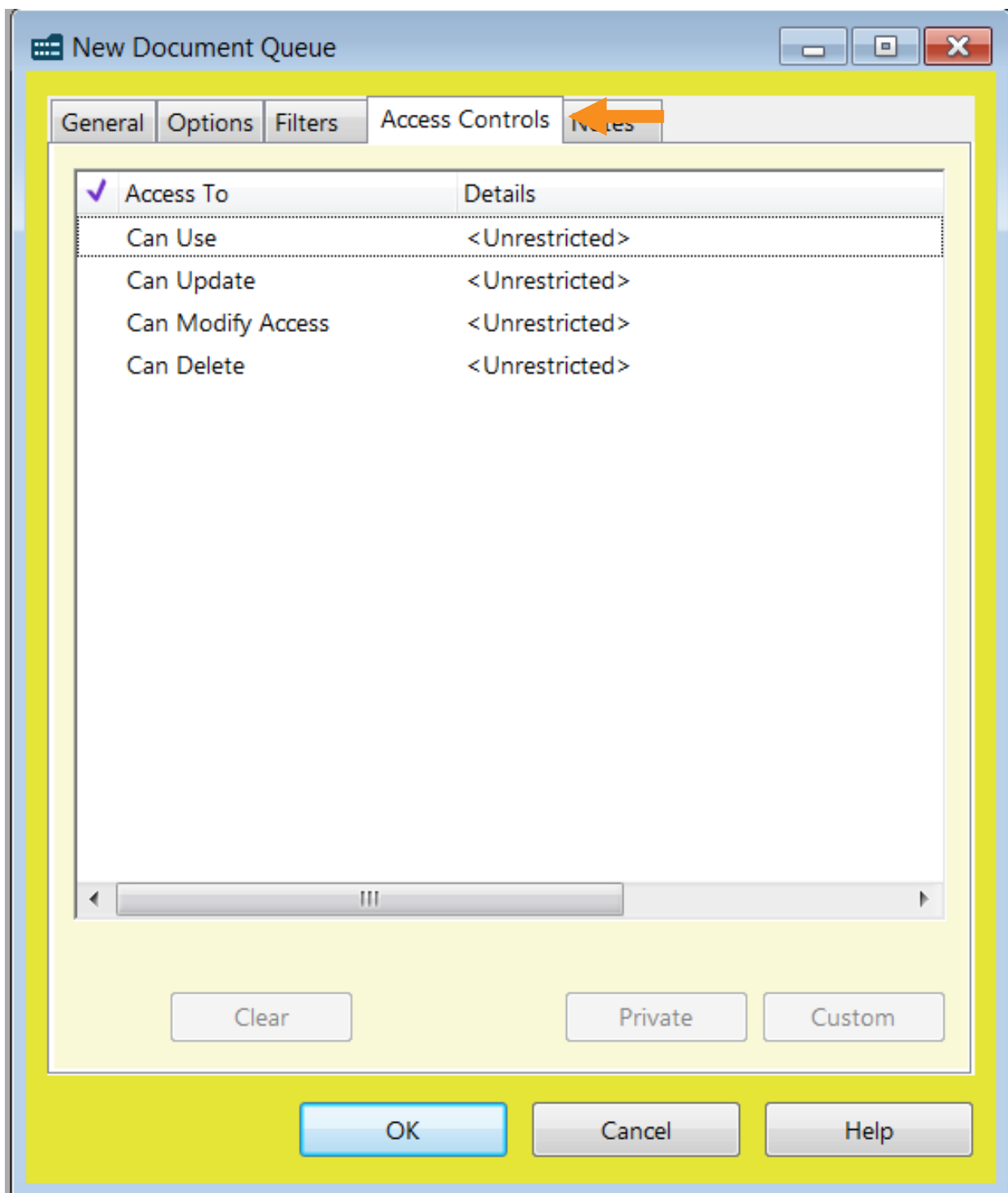
☒ If possible, suppress entry form when creating new records **1**

After processing each document:

Delete the document **2**

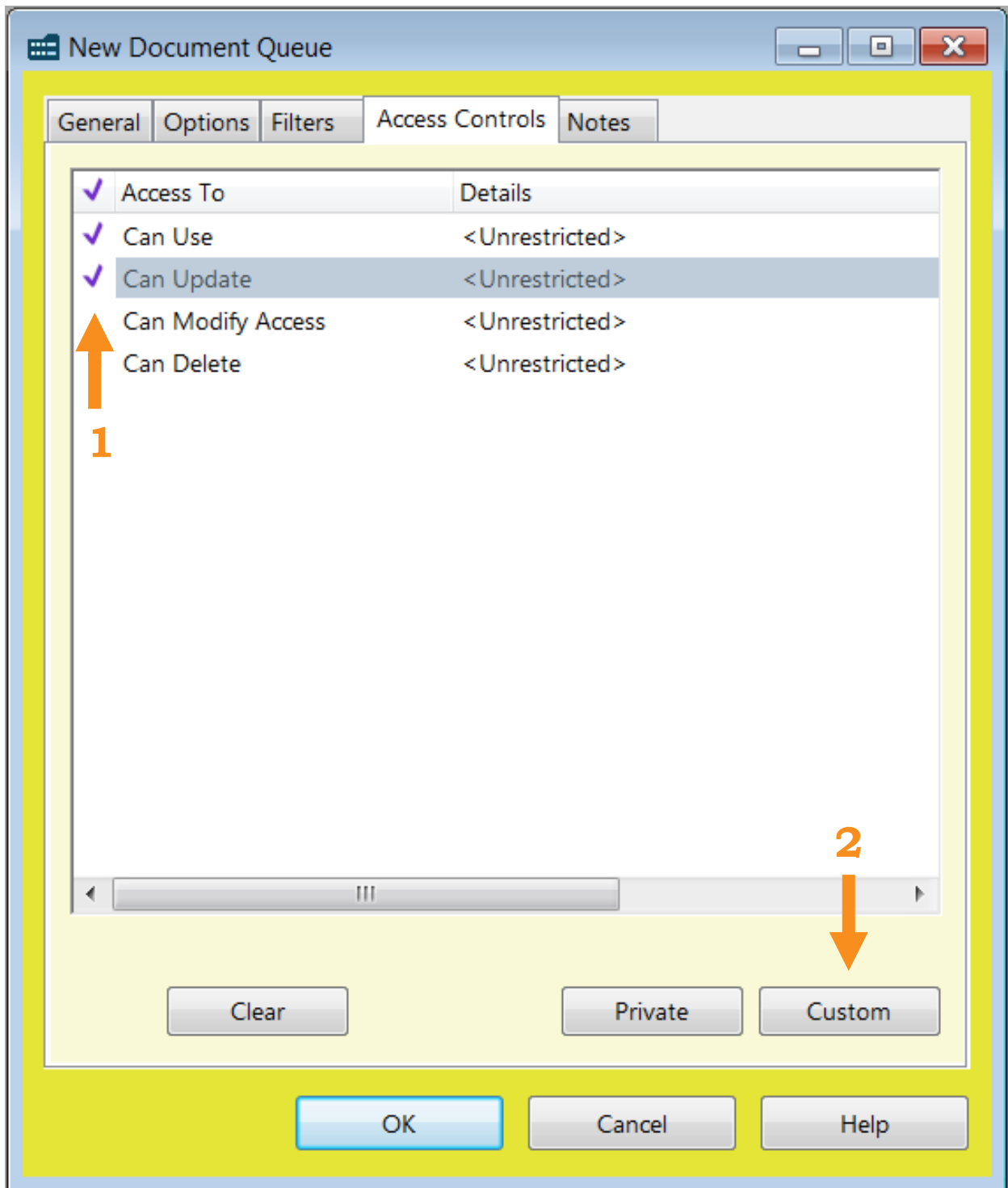
OK Cancel Help

The **ACCESS CONTROL** tab, allows the user to designate who can use and update the queue:



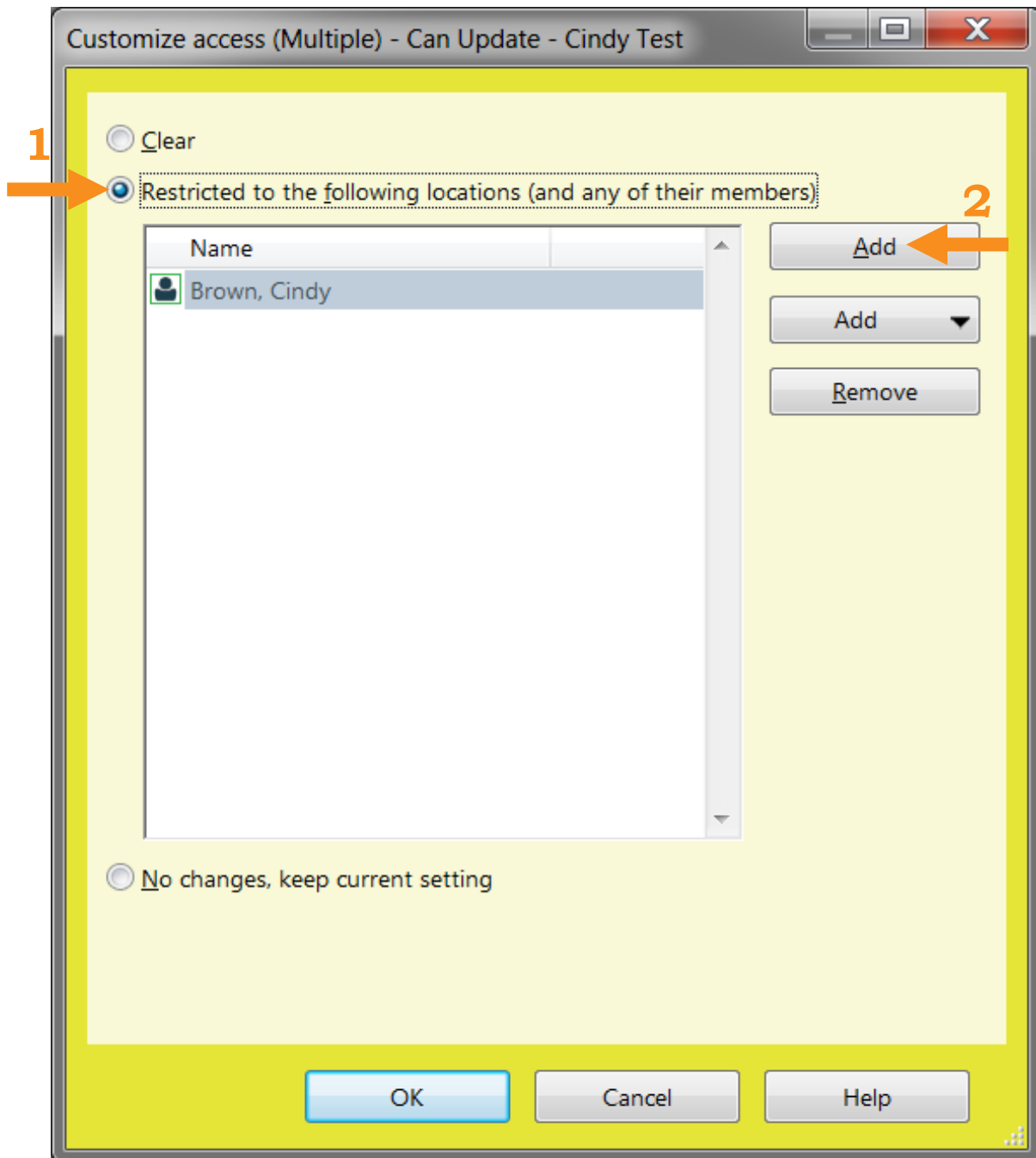
To change the **ACCESS CONTROLS** security settings:

- Select/Click in the ☒ **COLUMN** for whichever access should be edited.
- Click the **CUSTOM** button.



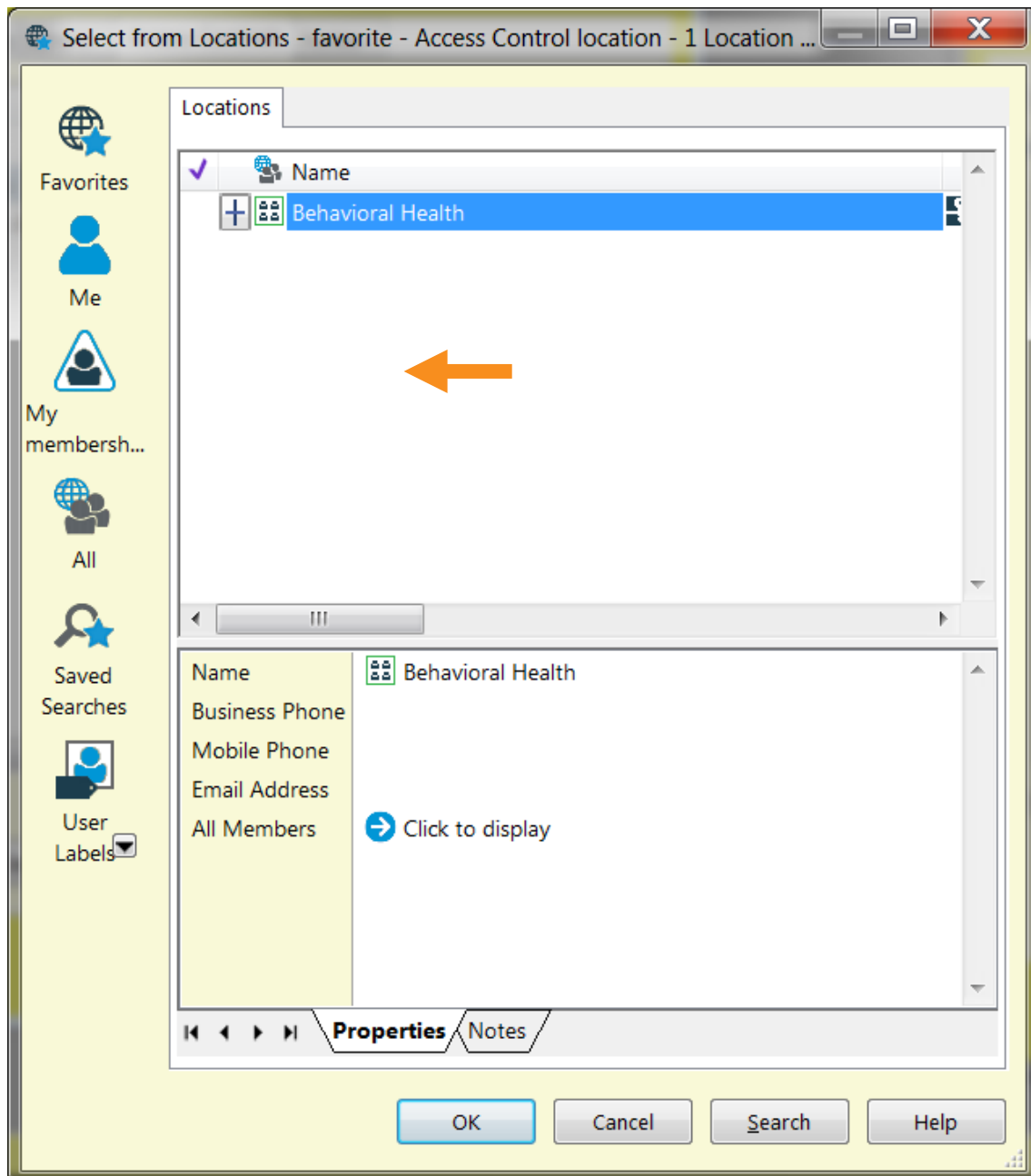
The **CUSTOMIZE ACCESS (MULTIPLE) - CAN UPDATE** screen will appear:

- Select/Toggle **RESTRICTED TO THE FOLLOWING LOCATIONS (AND ANY OF THEIR MEMBERS)** box.
- Click **ADD**.



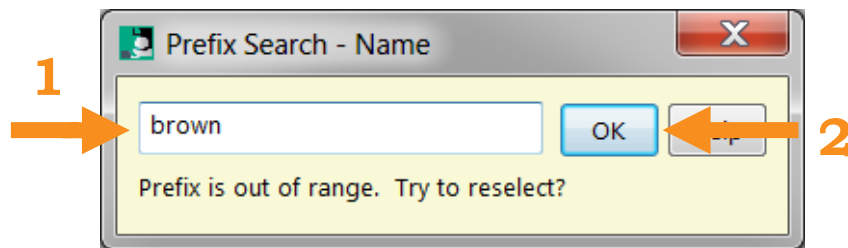
The **SELECT FROM LOCATIONS - FAVORITE - ACCESS CONTROL LOCATION** screen will appear:

- Click anywhere in the **MIDDLE** of the screen.
- Start typing either the **LAST NAME OF THE USER** or **AGENCY NAME**.



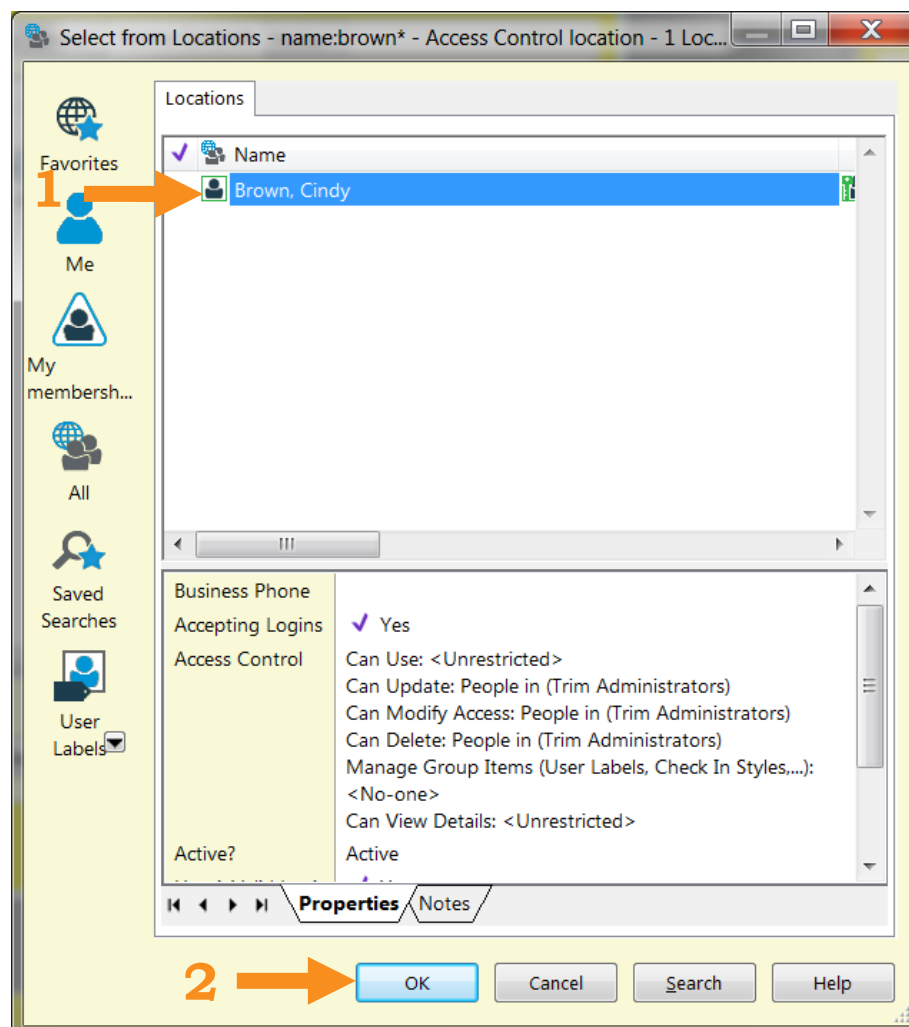
The **PREFIX SEARCH - NAME** screen will appear:

- Finishing typing the **LAST NAME OF THE USER** or **AGENCY NAME**.
- Click **OK**.



The **SELECT FROM LOCATIONS** screen will appear:

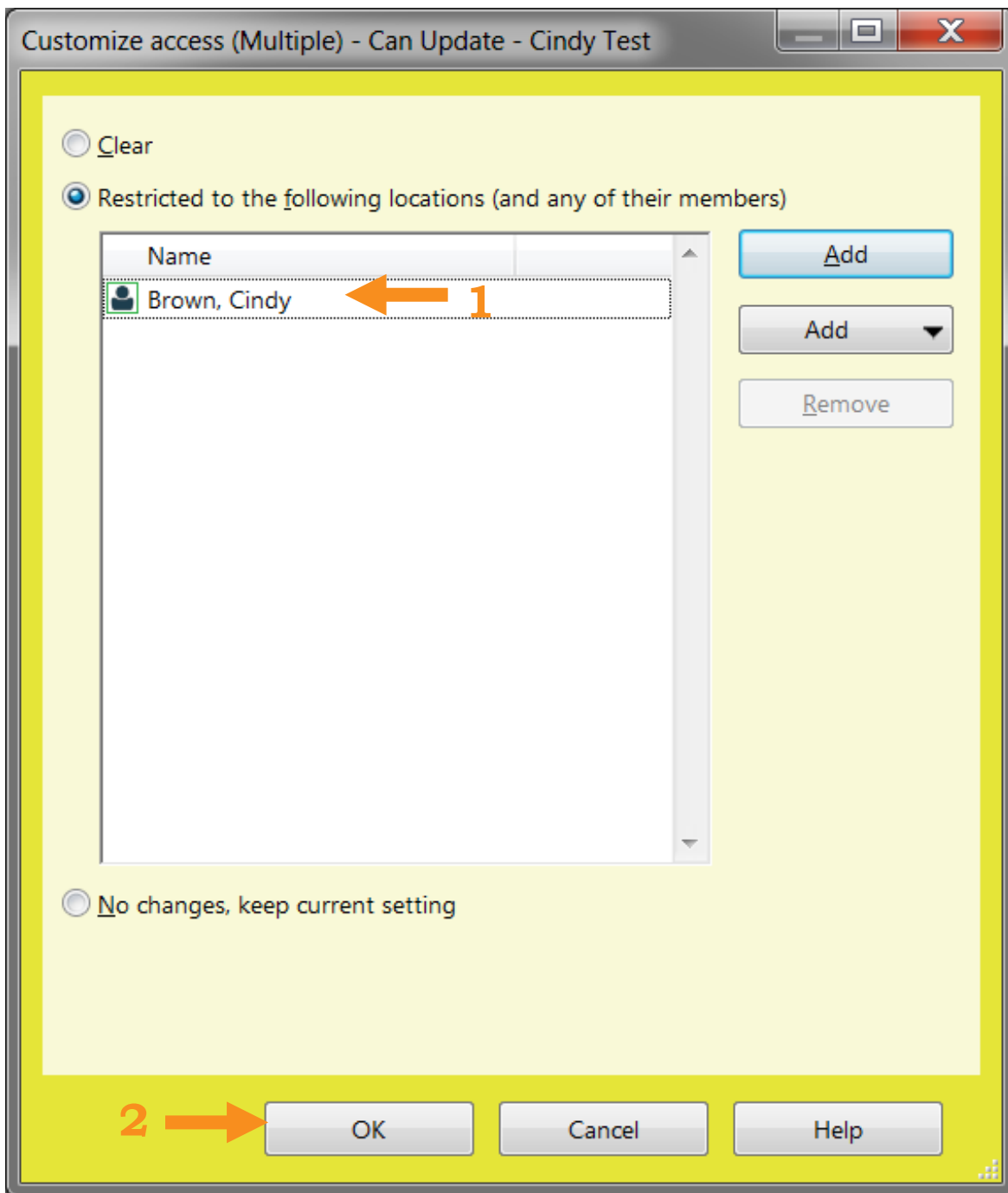
- Highlight the **PERTINENT NAME/NAMES FROM THE LIST**.
- Click **OK**.



The **CUSTOMIZE ACCESS (MULTIPLE)** screen will reappear.

If the name/names look correct:

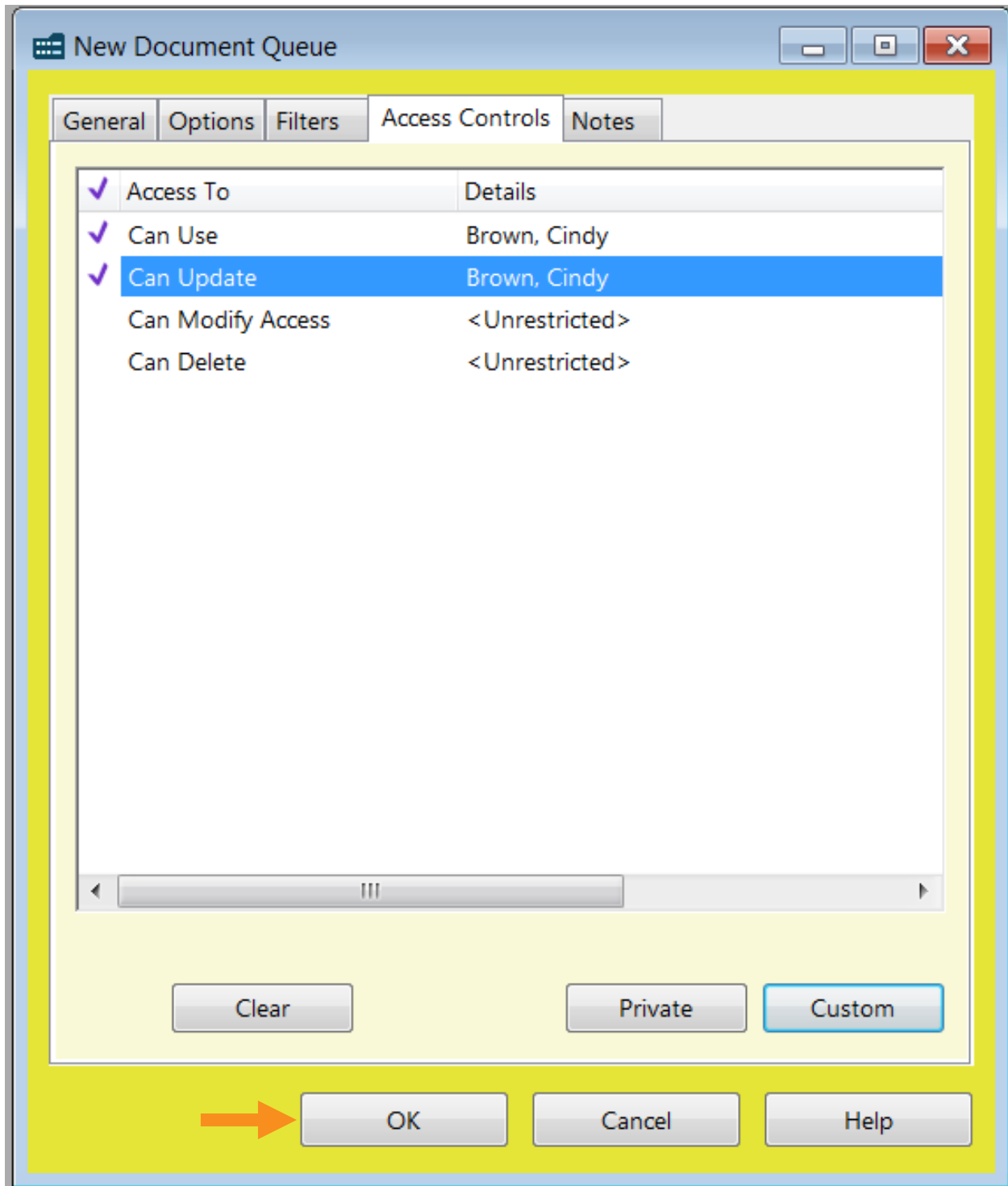
- Click **OK**.



The **NEW DOCUMENT QUEUE** screen will reappear.

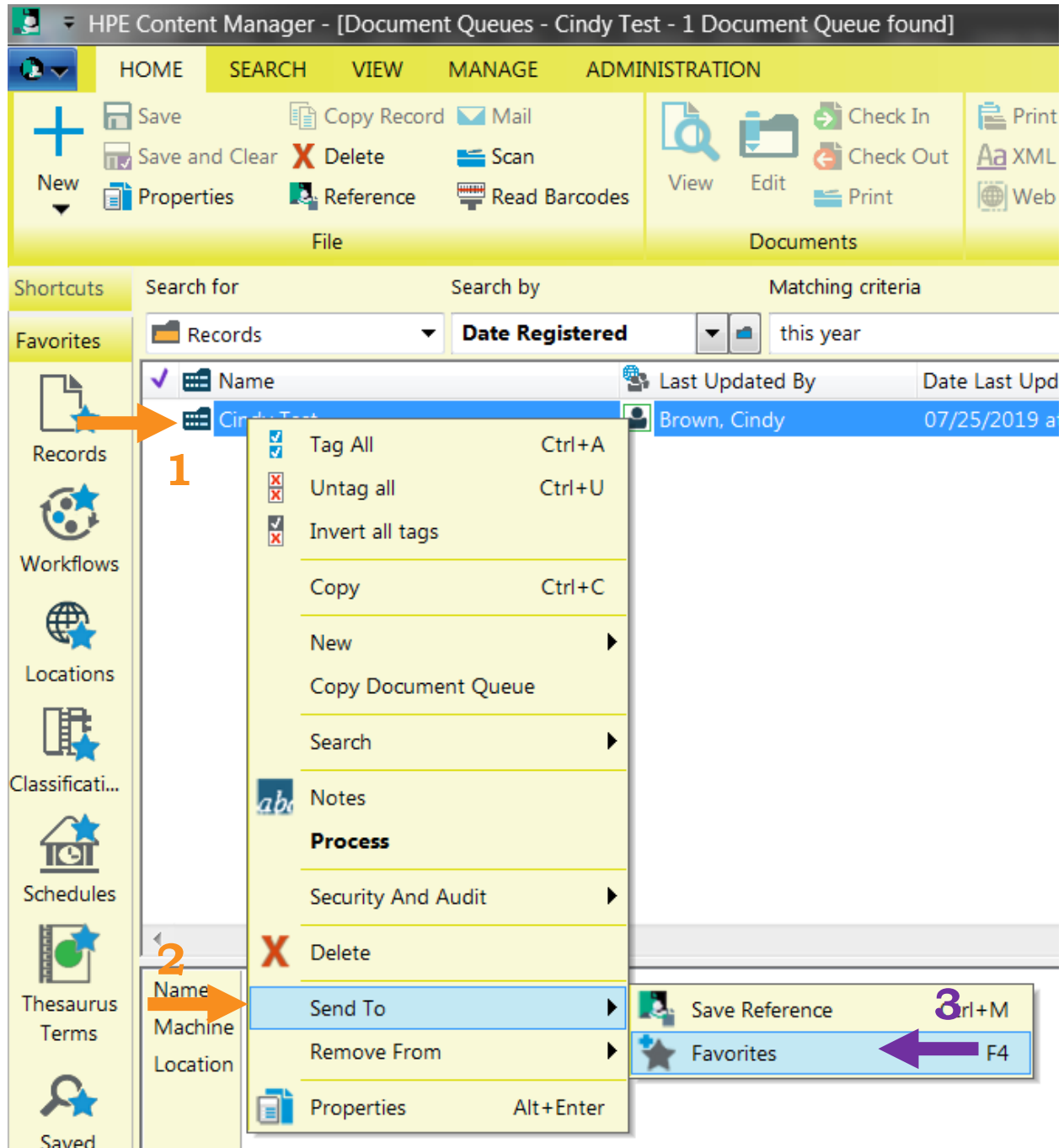
To complete the creation of the Document Queue:

- Click **OK**.



The Document Queue will appear on the screen. To save it as a **FAVORITE**:

- Right-Click on the pertinent **DOCUMENT QUEUE**.
- Select **SEND TO**.
- Click **FAVORITES**.



APPENDICES: (ADVANCED USER INSTRUCTIONS)

6.1 [Searching for Document/Containers - Complex](#)

Searching for Documents/Containers - Complex

(See also training video linked to: <http://wyoarchives.state.wy.us/index.php/wyoming-digital-archives>.)

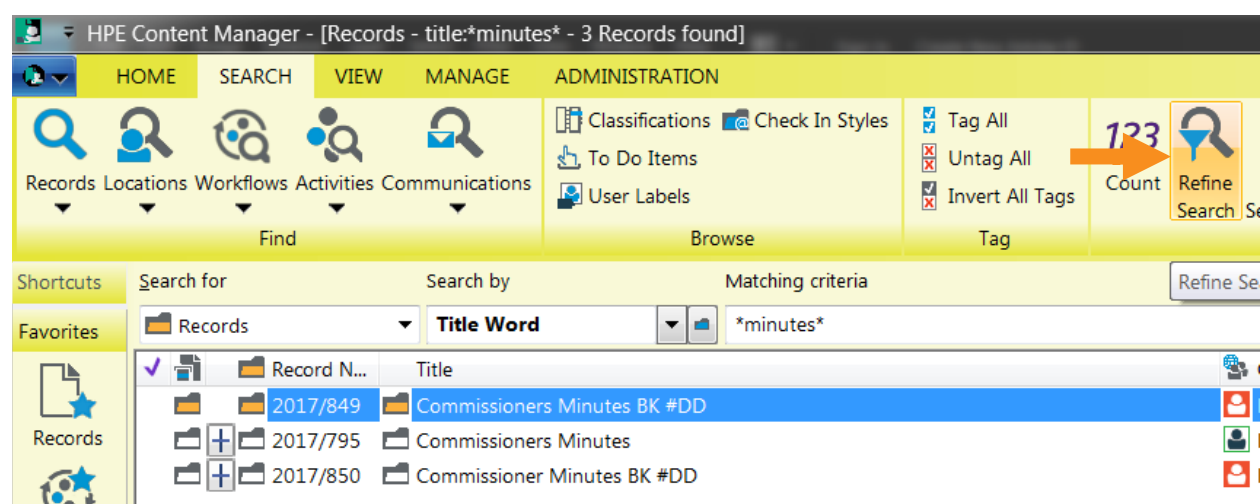
The Digital Archives has powerful search capabilities, ranging from simple one term searches up to complex multi-tiered searches which can be saved for future use.

COMPLEX/FILTERED SEARCHES

The simple search results can be narrowed down, or more than one search criteria may be used:

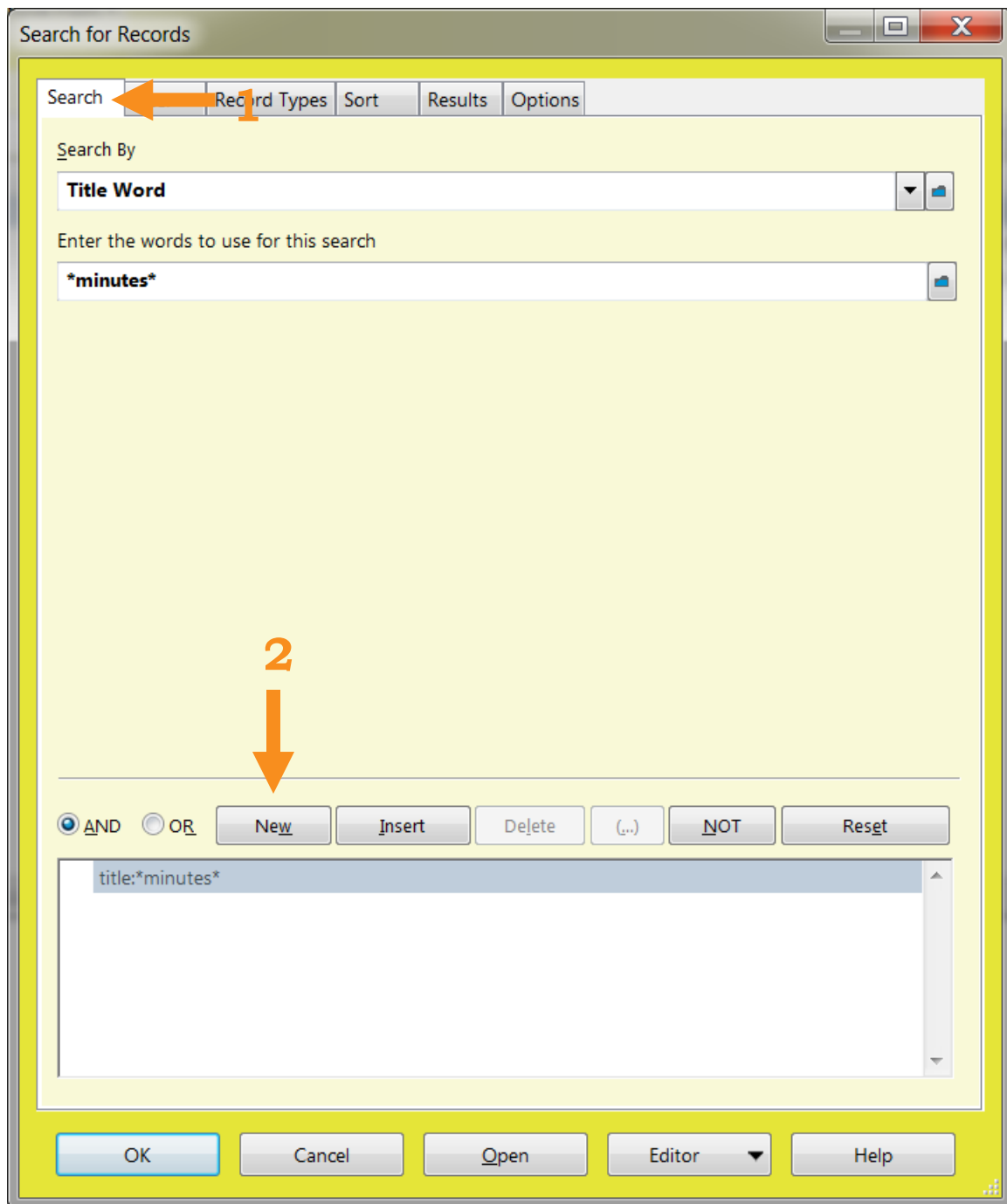
After searching for a record, ([see instructions above](#)):



- Select the **REFINE SEARCH (FILTER)** icon .

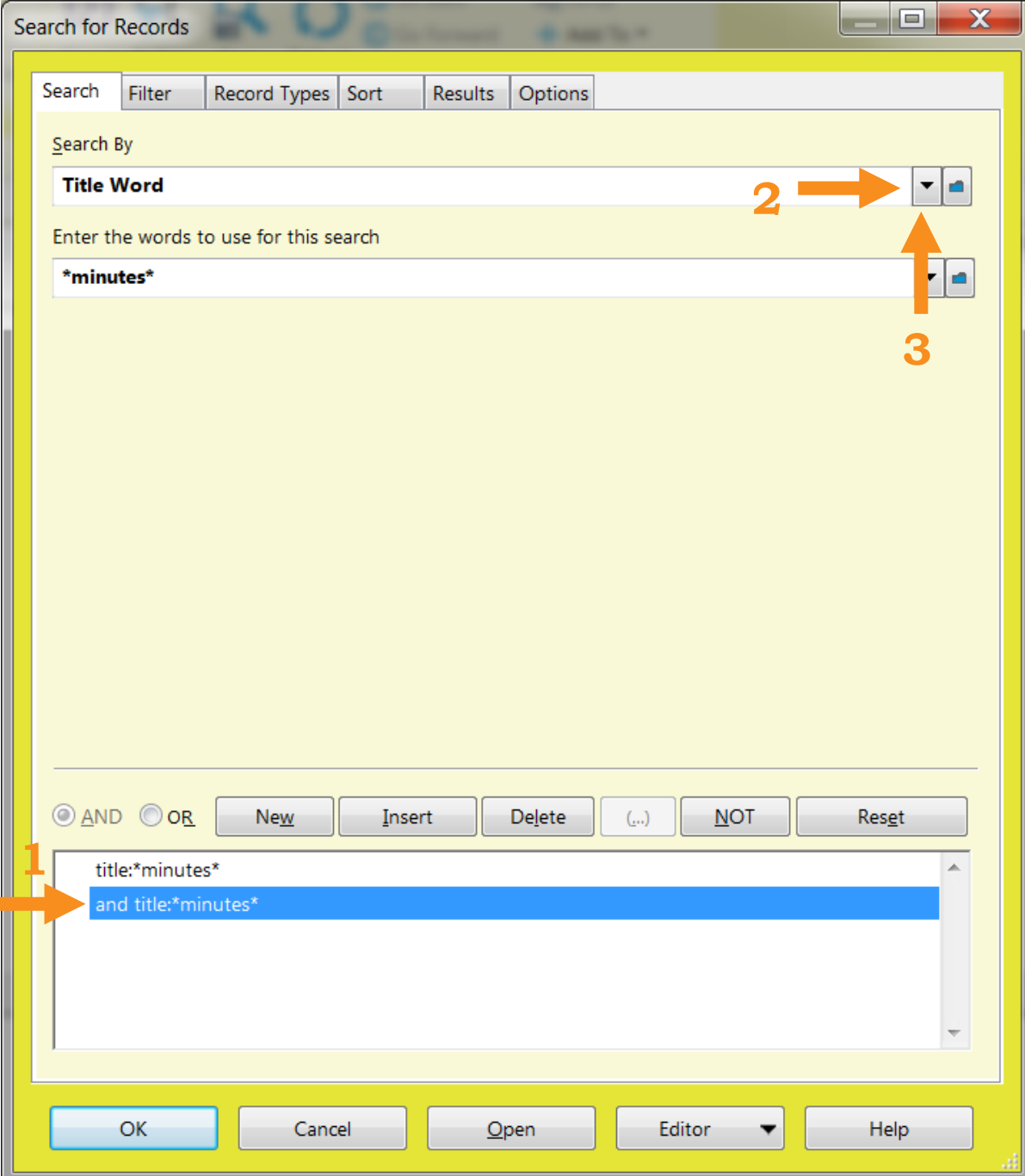


The **SEARCH FOR RECORDS** screen will appear. To **EDIT** or **REFINE** the search results:

- In the **SEARCH** tab.
- Select the **NEW** button to add a new layer/search by option.



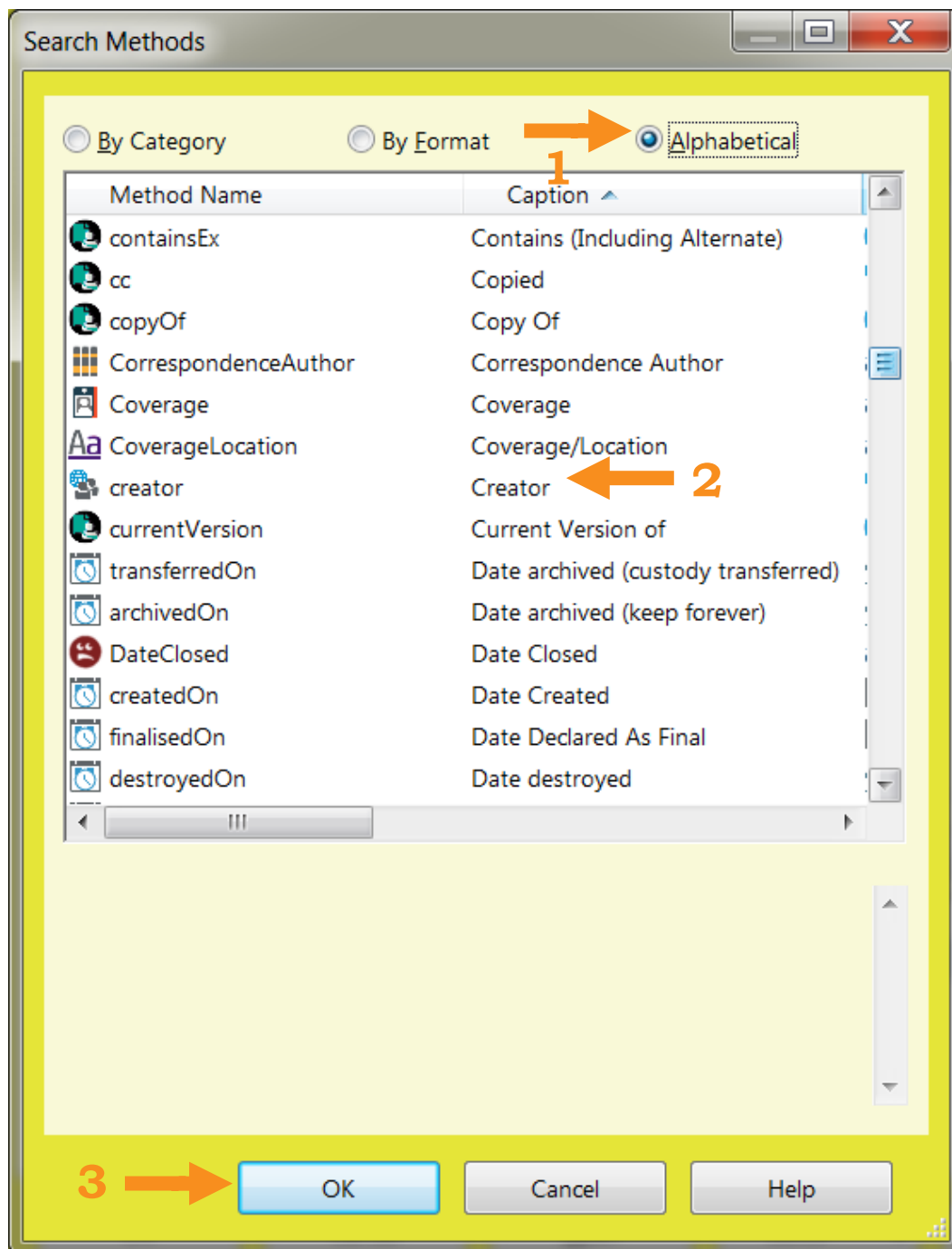
- Click the **BOTTOM** search criteria.
- Select a **SEARCH BY** choice/Click the **DOWN ARROW** .
- For even more **SEARCH BY** alternatives, click the **BLUE FOLDER** icon -which will provide a list of all search options-including any special data entry fields that may have been set up for the agency's records.



The screenshot shows the 'Search for Records' dialog box with a yellow background. At the top, there are tabs: Search, Filter, Record Types, Sort, Results, and Options. The 'Search' tab is active. Below the tabs, there is a 'Search By' section with a text box containing 'Title Word'. To the right of this text box is a dropdown arrow (labeled with an orange arrow and the number 2) and a blue folder icon. Below this is a text box for 'Enter the words to use for this search' containing '*minutes*'. To the right of this text box is another dropdown arrow (labeled with an orange arrow and the number 3) and a blue folder icon. At the bottom of the dialog, there are radio buttons for 'AND' (selected) and 'OR', and buttons for 'New', 'Insert', 'Delete', '(...)', 'NOT', and 'Reset'. Below these is a list box containing two items: 'title:*minutes*' and 'and title:*minutes*'. The second item is highlighted in blue (labeled with an orange arrow and the number 1). At the very bottom of the dialog are buttons for 'OK', 'Cancel', 'Open', 'Editor' (with a dropdown arrow), and 'Help'.

If the **BLUE FOLDER** icon  is clicked the **SEARCH METHODS** screen will appear:

- Toggle/Select the **ALPHABETICAL** circle (to make the list easier to search).
- Select/Highlight the pertinent **SEARCH METHOD**.
- Click **OK**.



The **SEARCH FOR RECORDS** screen will reappear. In this example:

- A new **CREATOR** search has been added for the name “**Brown, Cindy.**” to the **TITLE** search for ***minutes***.

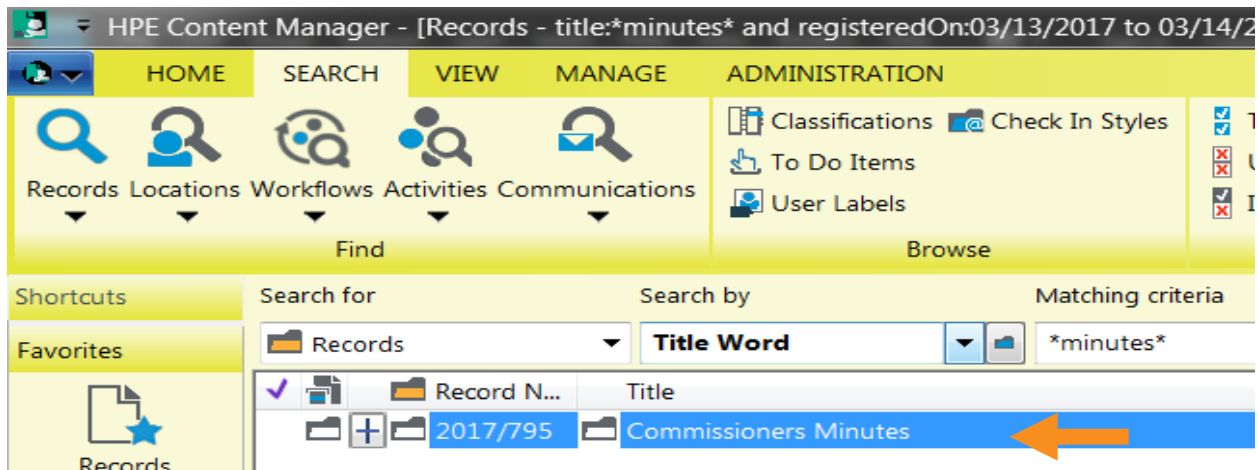
(Note: The **NOT** button and **OR** circle can also be used to filter out words/phrases.

- Toggle/Select the **RECURSIVE** box, if it appears (it does not necessarily show up for all search criteria).
- Click **OK**.

The screenshot shows the 'Search for Records' dialog box with the following elements and annotations:

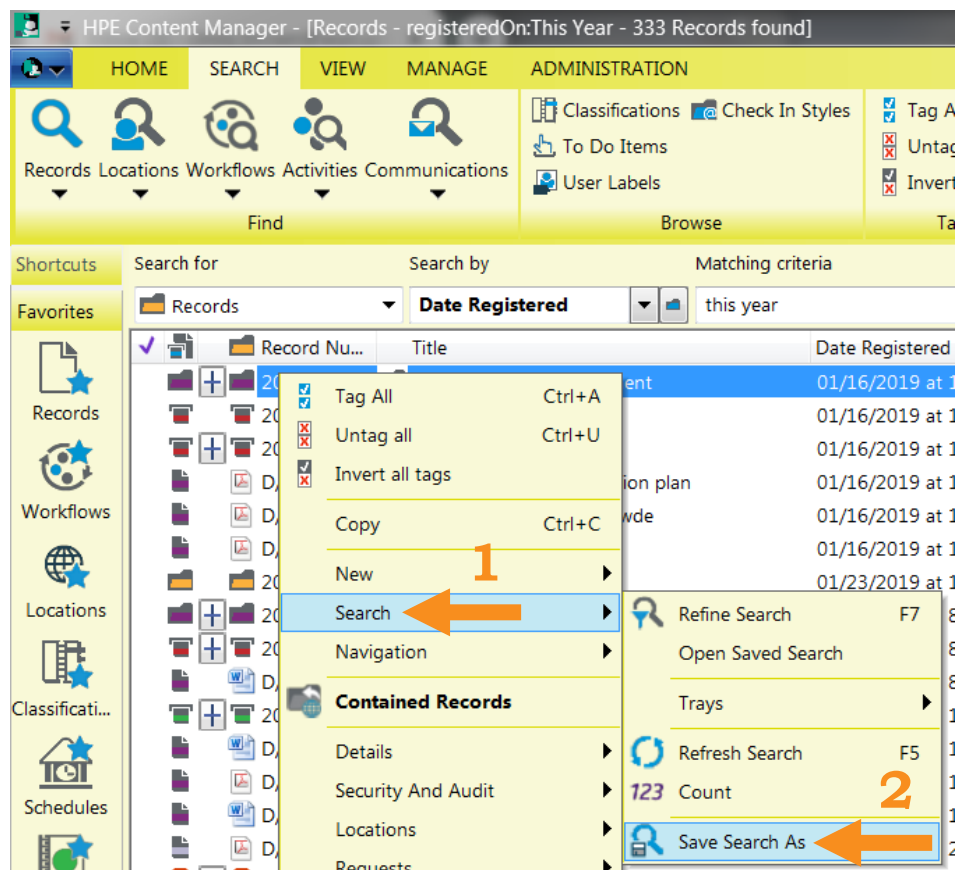
- Search By:** A dropdown menu set to 'Creator' (indicated by orange arrow 1).
- Enter the Location to search by:** A text field containing 'Brown, Cindy' (indicated by orange arrow 2).
- Recursive:** A checked checkbox (indicated by orange arrow 3).
- Select search style for Location:** A dropdown menu set to 'An individual Location'.
- Search Logic:** Radio buttons for 'AND' (selected) and 'OR'. Buttons for 'New', 'Insert', 'Delete', '(...)', 'NOT', and 'Reset'.
- Search Criteria:** A text area containing 'title:*minutes*' and 'and creator:Brown, Cindy' (indicated by orange arrow 4).
- Buttons:** 'OK', 'Cancel', 'Open', 'Editor', and 'Help' at the bottom. The 'OK' button is highlighted with a blue border and indicated by orange arrow 5.

This will bring up the filtered (refined) results:



If the same search is continually used, it can be saved/added to the **FAVORITES**. To save the search:

- **RIGHT-CLICK** on any of the documents.
- Select **SEARCH**.
- Select **SAVE SEARCH AS**.



The **NEW SAVED SEARCH** screen will appear:

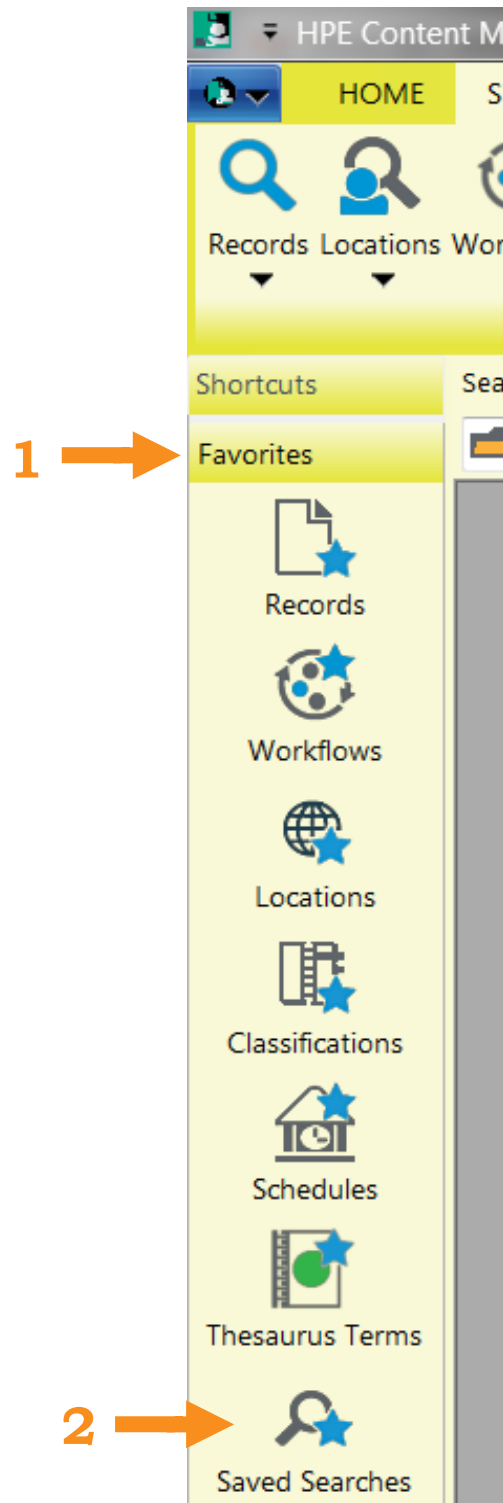
- Type in a **NAME** for the new saved search.
- Select/Toggle **ADD TO FAVORITES**.
- Click **OK**.

The screenshot shows the 'New Saved Search' dialog box with the following fields and controls:

- Name:** A text field containing 'Cindy Temp'. An orange arrow labeled '1' points to this field.
- Description:** A text area containing 'Records - title:*minutes* and registeredOn:03/13/2017 to 03/14/2017'.
- Icon:** A dropdown menu showing a magnifying glass icon.
- Owner:** A text field containing 'Brown, Cindy'.
- Within Search Group:** A text field that is empty. An orange arrow labeled '2' points to this field.
- Add to favorites:** A checkbox that is checked. An orange arrow labeled '3' points to this checkbox.
- Edit query:** A button located to the right of the 'Add to favorites' checkbox.
- Buttons:** At the bottom, there are three buttons: 'OK', 'Cancel', and 'Help'. An orange arrow labeled '3' points to the 'OK' button.

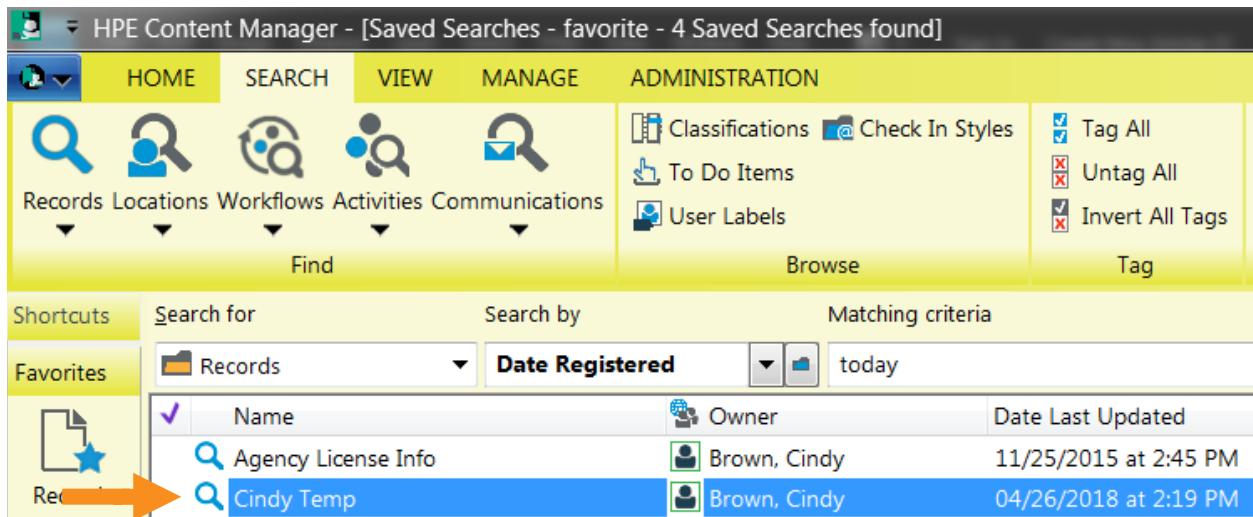
To run the **FAVORITE SAVED SEARCH**:

- Under the **FAVORITES** bar.
- Click on the **SAVED SEARCH** icon.

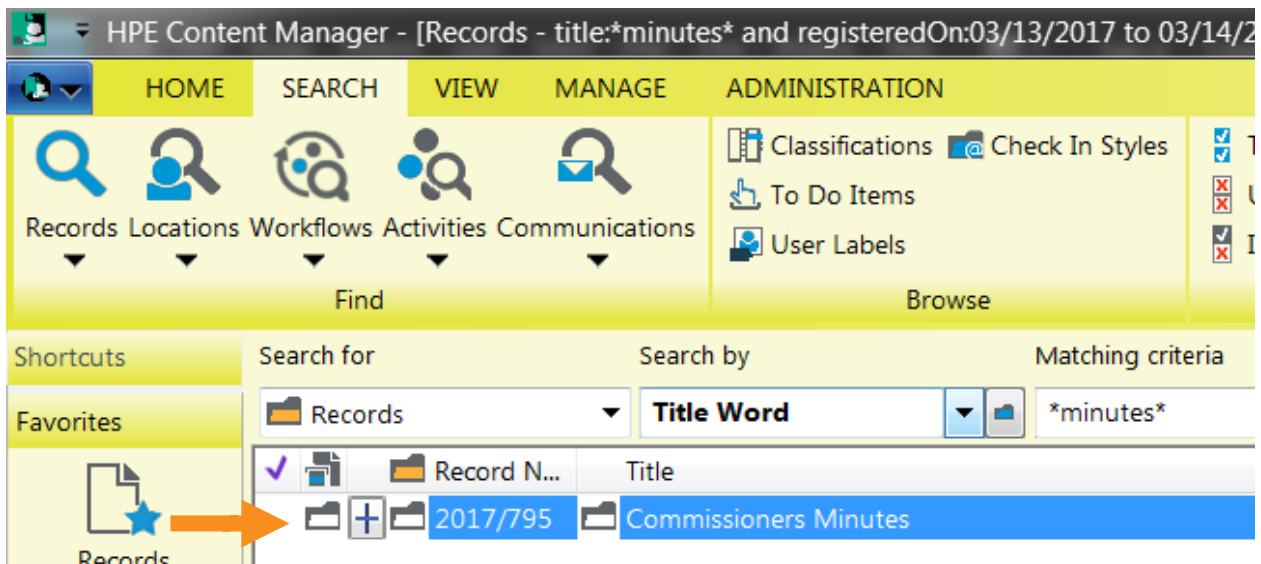


The **FAVORITE SAVED SEARCHES LIST** will appear.

- Select/Highlight the **PERTINENT SEARCH**.
- Double-Click or hit Enter to **RUN THE SEARCH**.



The results will then appear on the screen:



GLOSSARY

Classifications

Classifications are similar to Retention Schedules. In addition to determining a legally approved timeline for disposal or archiving of records, Classifications can be used to assign security levels/access restrictions. In the Digital Archives folder data entry form, the Classification field is generally mandatory.

Containers

Just as with paper records, a container is used to group documents. All of these are considered containers: box, folder, sub-folder, etc.

Datasets

Datasets are similar to databases. Datasets are a group of electronic records, servers, settings and indices that all tie together to create a collection of digital records. The Digital Archives has three datasets: QA (user testing environment), Development (IT testing environment) and Production (official use environment).

Date Created

A search term in the Digital Archives, it refers to the date the scanned/electronic document was created.

Date Registered

A search term in the Digital Archives, it refers to the date when the scanned/electronic document was added to the Digital Archives.

ETS (Department of Enterprise Technology Services)

ETS is the department in charge of the maintenance and support of all aspects of Information Technology for Wyoming State government. They are an important partner in the Wyoming Digital Archives project as they assign user credentials to the remote server, oversee all the servers on which the datasets are stored, and manage the data backup process.

Files

Files in the Digital Archives are the equivalent of documents.

Folders

Folders in the Digital Archives are containers, which usually hold documents. Sub-folders could also be nested within the folders.

Location

Location is another name for users. It can refer to individual users and agencies.

Metadata

Metadata is widely defined as "data about data." For most Digital Archives users, it is primarily considered the data entry form which includes information about the specific record.

Record Types

Record Types are a group of settings which help customize documents, folders and sub-folders. The settings help determine the security level of the records, who can access and add a particular type of records, what fields are used in the data entry form, where the documents are stored on the servers, etc.

Records

Records are information, regardless of medium or characteristics, made or received by an agency in pursuance of legal obligations or in the transaction of business. In the digital archives "records" is a general term that applies to documents, files, folders, etc.

Retention Schedules

Retention Schedules are a legally approved timeline for the disposal or archiving of records.

User Type

User Type determines which tasks the licensed user can perform. For example, an Inquiry User, the lowest type, only permits the user to search and copy records.