



WYOMING STATE  
**ARCHIVES**

WYOMING DIGITAL ARCHIVES

# Wyoming Digital Archives User Manual

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August 2019

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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 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 paper records. 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 desktop client or at any computer by using the secure web client. 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 paper records.

### Storage and backup

- Records in the Digital Archives are stored and backed up daily, weekly, monthly on servers administered by ETS; 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 Agencies. The Archives can provide a reasonable number of licenses to each agency and 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\*](#).
- The State Archives' State Imaging Center is able to assist agencies that have large scanning projects involving paper or microfilmed records. If interested, please contact the State Archives staff for more information about the services the State Imaging Center provides.

## 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 has a limited number of licenses available to each agency. If needed, the agency can purchase additional licenses and pay the annual maintenance fees. The agency provides each of the users' names and corresponding network user names.

### 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.

### Software

The State Archives will ask ETS to load the software on the agency computer/computers. If the agency has dedicated IT staff available, they can also request a copy of the software package from ETS.

### 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. 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.

The State Archives will schedule a visit to provide additional training and help with software default settings.

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 agency can use one of two methods to add **documents** to folders/sub-folders/etc.



**Adding Documents - Dragging & Dropping:** A batch of records can be selected/highlighted in Windows Explorer and dragged over to a Digital Archives folder/sub-folder/etc. It adds a copy of the records to the Digital Archives. Unless the user wants to select the Record Type individually for each document added, it is recommended that the Drag & Drop Default Setting is used ([see section above](#)). If more than one record is highlighted and dropped into the Digital Archives, once the record type is determined, a Process Documents in Folder screen will appear in the software. The records will need to be "checked in." ([see appendix for more details](#)).

**Adding Documents - Document Queues:** A Document Queue folder can be set up on the agency computer with a linked queue folder set up in the Digital Archives. Any records added to the agency computer queue folder will be "processed" and placed in the Digital Archives. Again, 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](#)).

Note: As a rule, Document Queues are not used when the documents in the Digital Archives need to be added to individual folders.

## Searching, Viewing and Copying

**S**earching 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, 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:** There are two primary ways to copy documents out of the Digital Archives. If the agency only needs a copy of one document, it can be dragged and dropped onto the user's computer desktop. If copies of multiple documents are required, they can be "supercopied," 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.

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# 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
<b>Create Records</b>	Yes	Yes	Yes	Yes	Yes	No
<b>Modify Records</b>	Yes	Yes	Yes	No	No	No
<b>Delete Records</b>	Yes	Yes	No	No	No	No
<b>Reverse Final Declaration</b>	Yes	Yes	No	No	No	No
<b>Create New Parts</b>	Yes	Yes	Yes	No	No	No

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

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

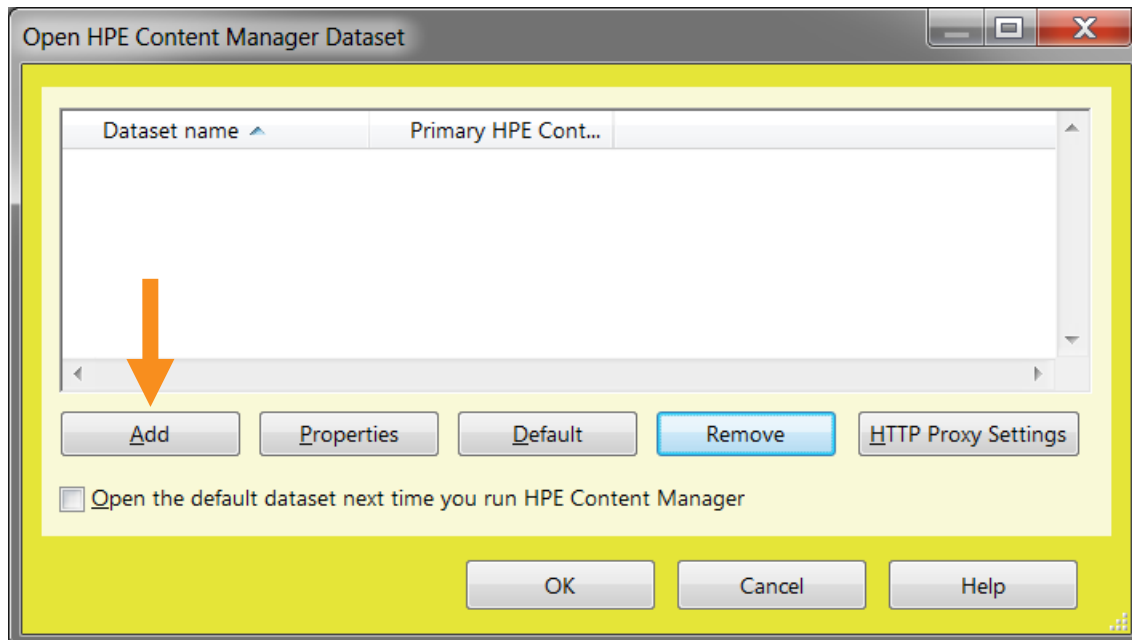
## Adding a Dataset to the Digital Archives Opening Screen

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:

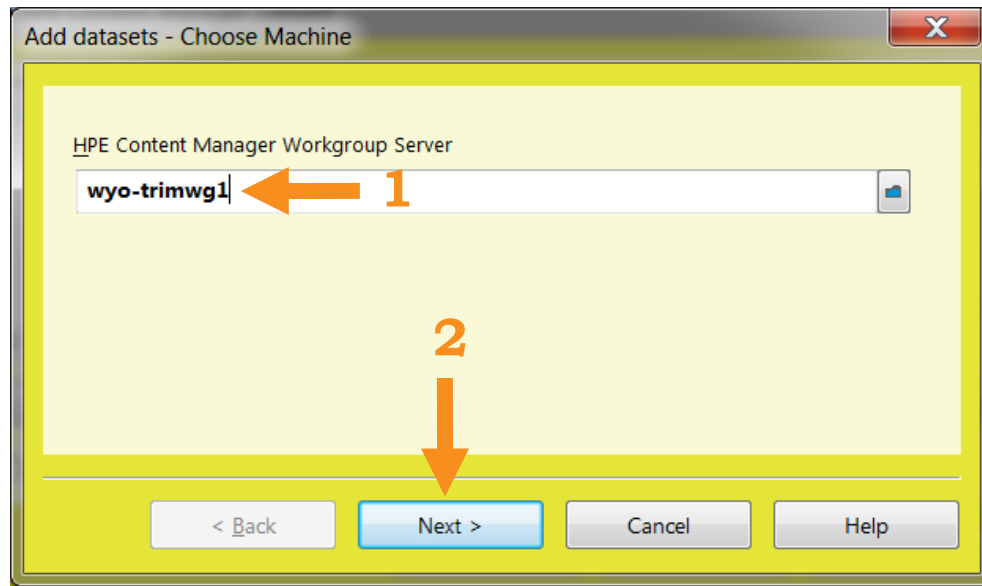
- Select **ADD**.





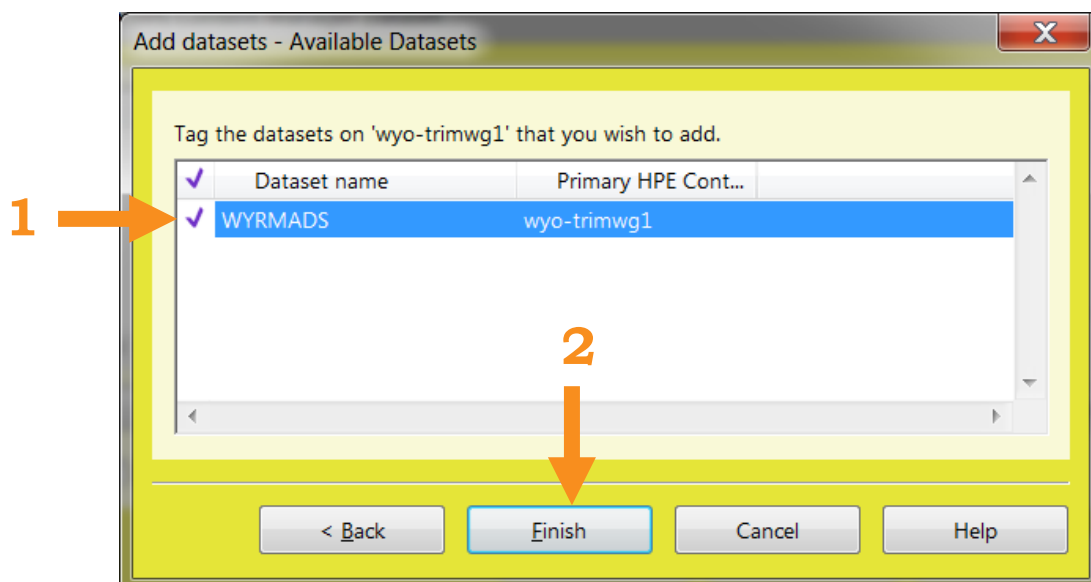
In the **ADD DATASETS - CHOOSE MACHINE** screen:

- 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**.



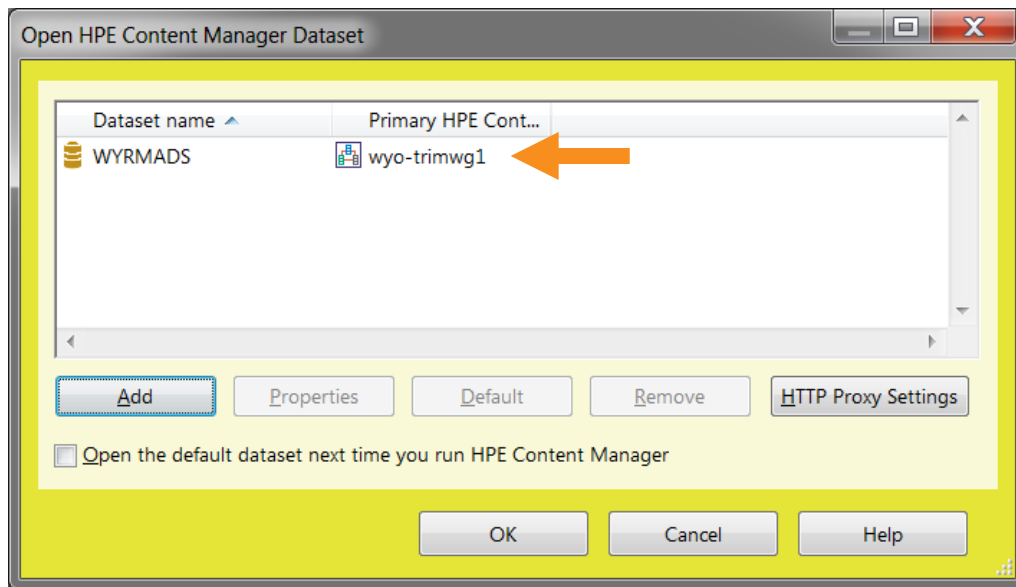
In the **ADD DATASETS - AVAILABLE DATASETS** screen:

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



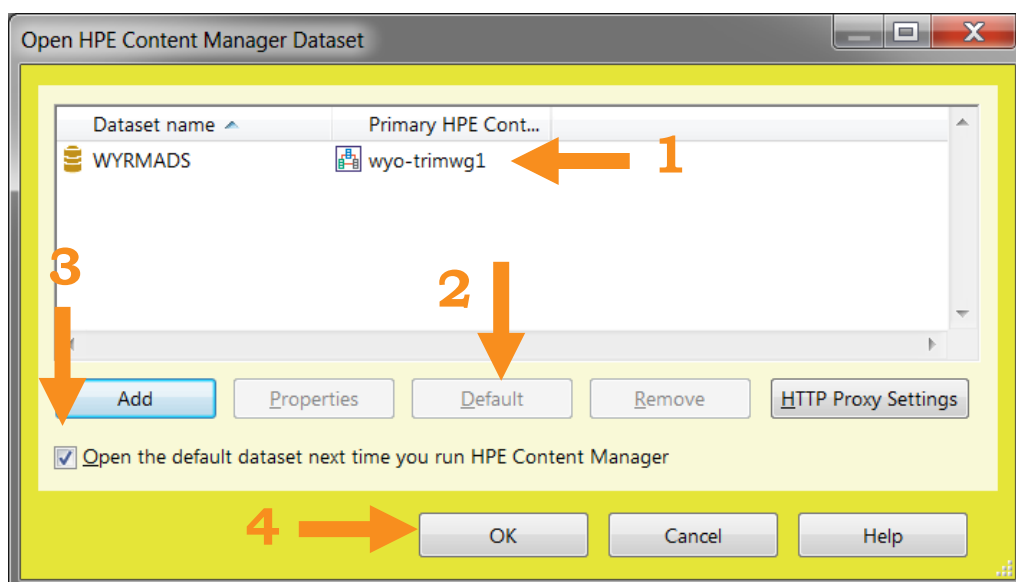
In the **OPEN HPE CONTENT MANAGER DATASET** screen:

- The dataset will now appear on the list.



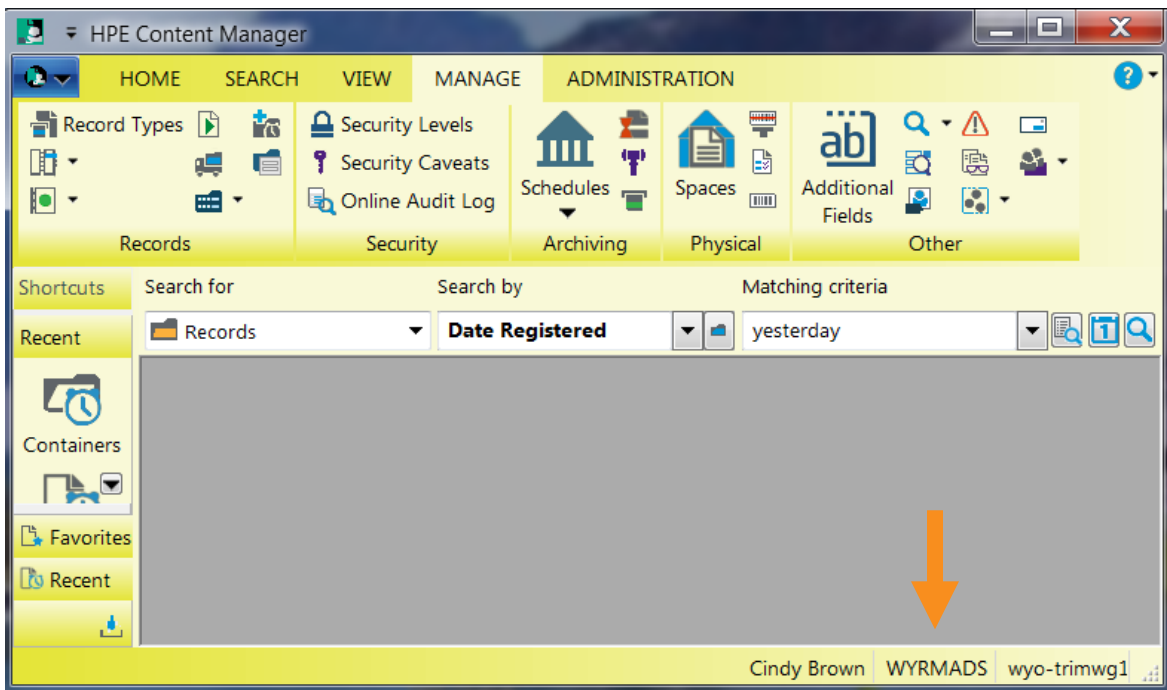
To select **WYRMADS** as the Default dataset:

- 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**.



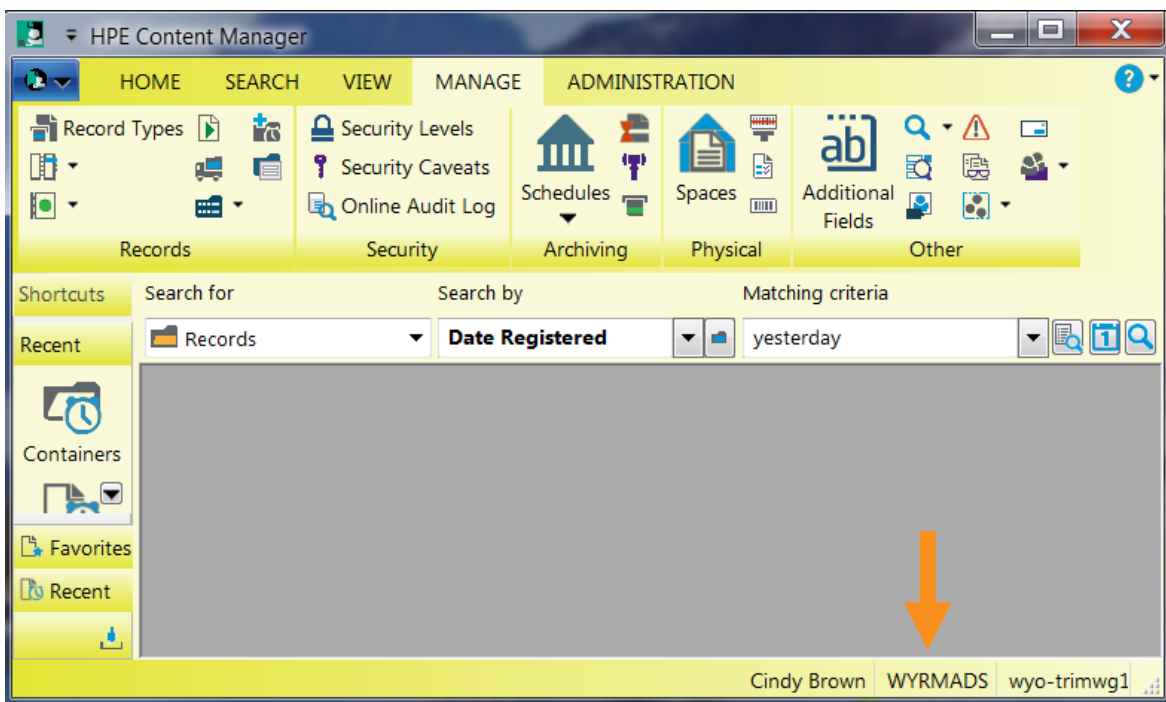
The Digital Archives (HPE Content Manager) will open:

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

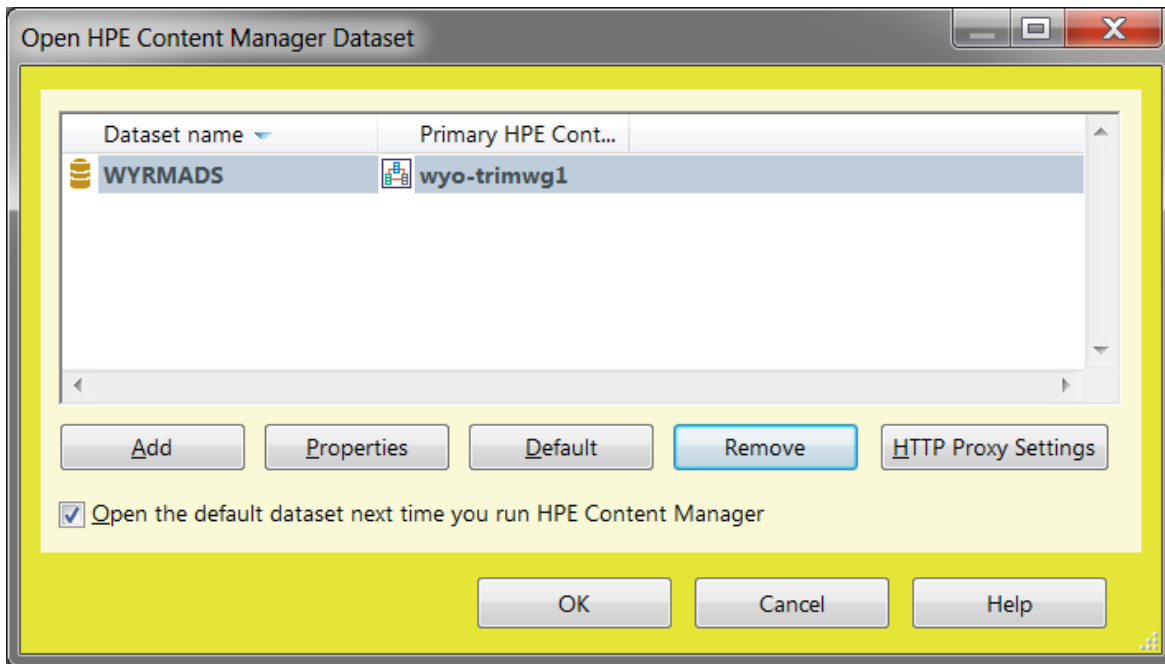


To access the **DATASET** screen again:

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

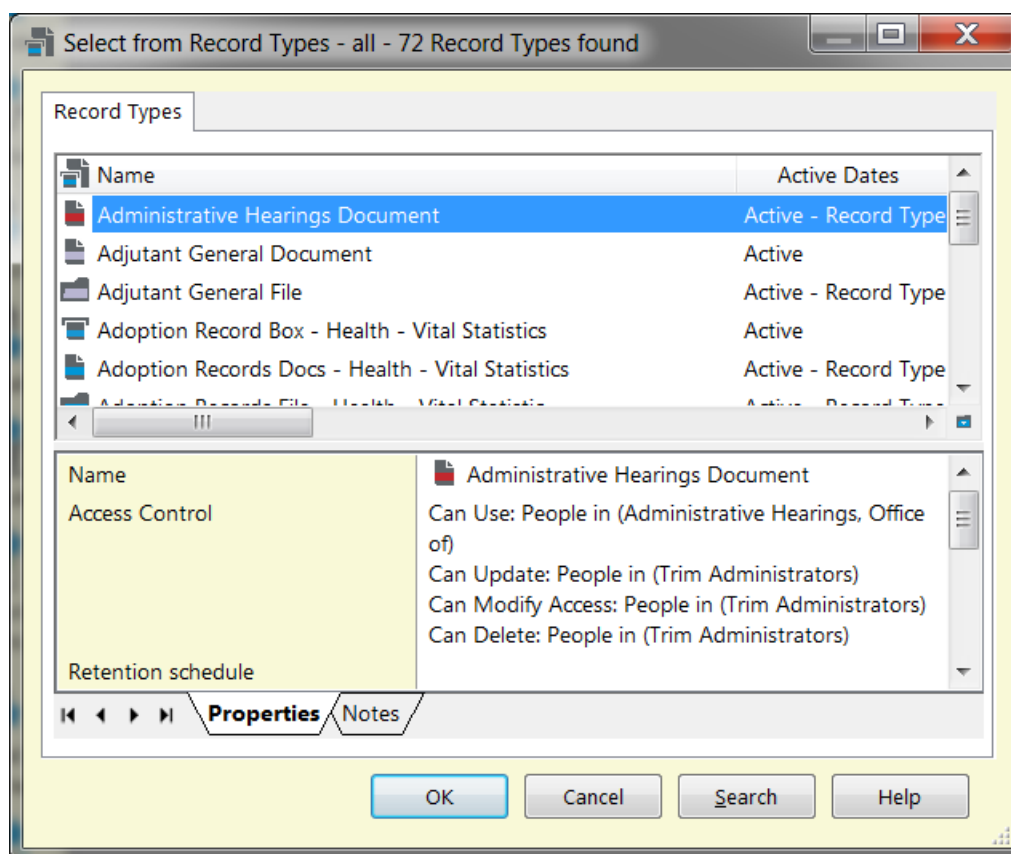


The **OPEN HPE CONTENT MANAGER DATASET** screen will reappear:




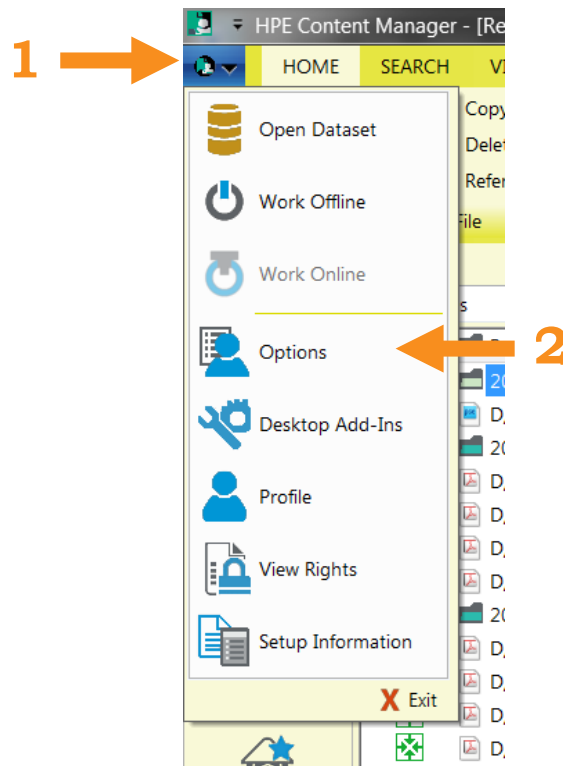
# Default Drag and Drop Settings

Documents can be added to the Digital Archives by selecting them in the user's network computer folders and dropping them onto folders in the Digital Archives. Unless a default **Dropped File** record type is selected, the software will prompt the user to select a record type for **EACH** document dropped into the Digital Archives.



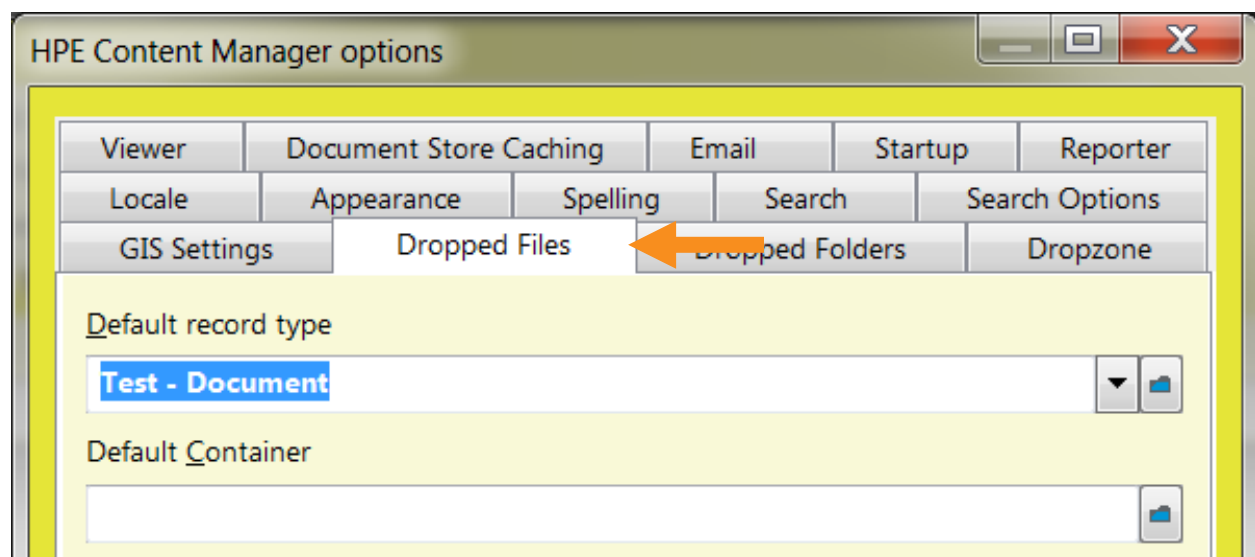
If all the documents being dropped are the same record type, a default setting could be used instead:


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

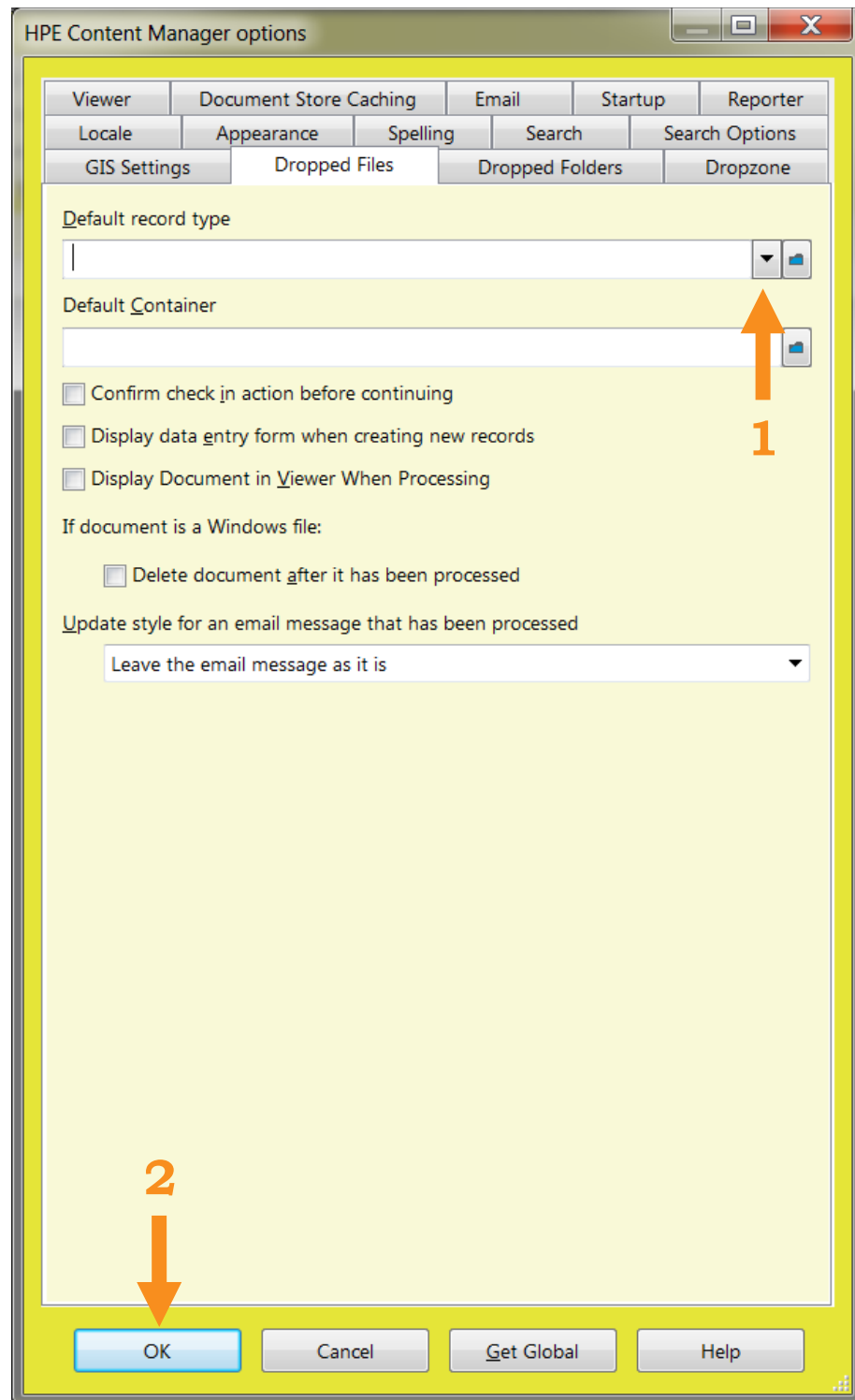


In the **HPE CONTENT MANAGER OPTIONS** screen:

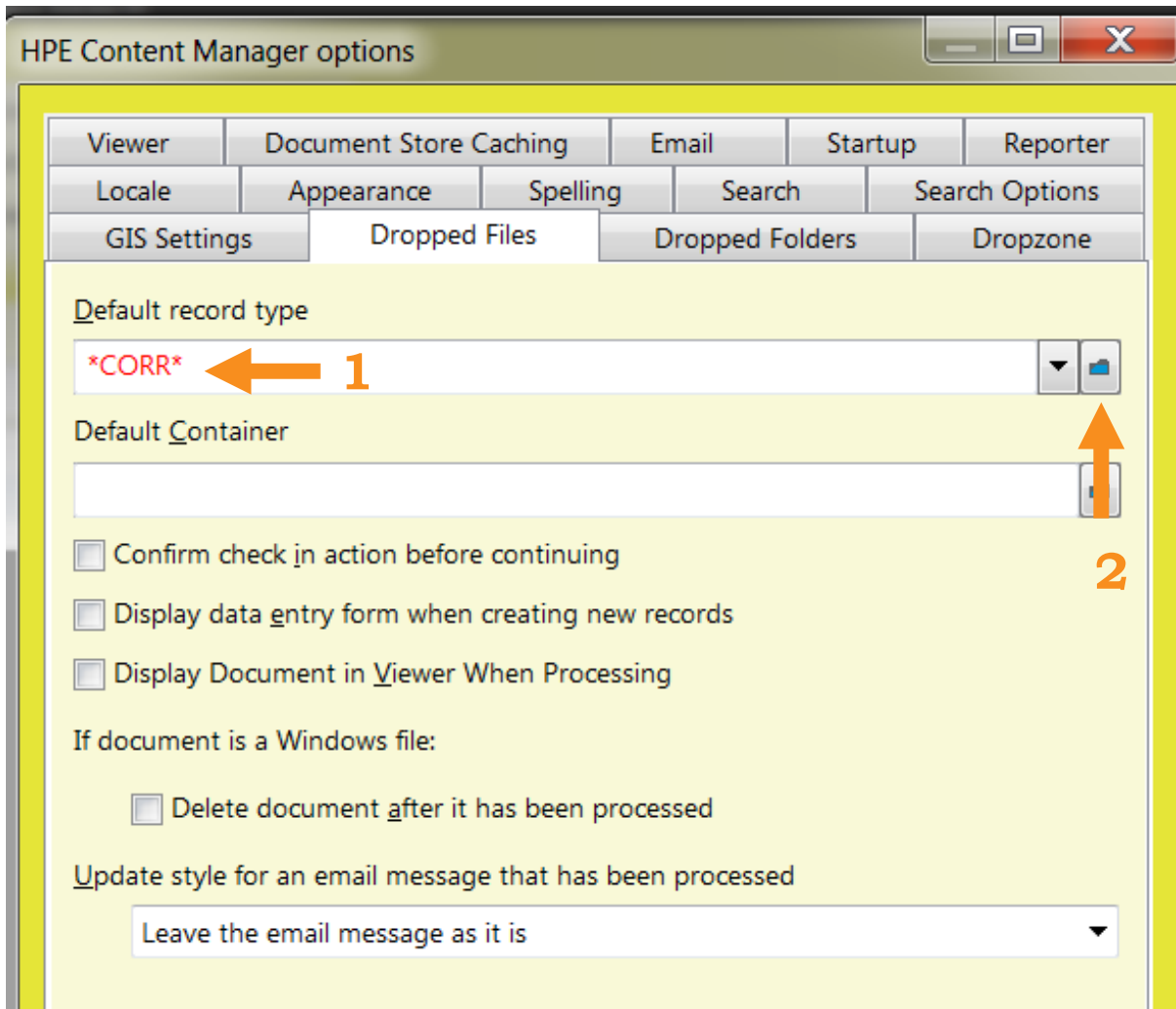
- Select the **DROPPED FILES** tab.



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



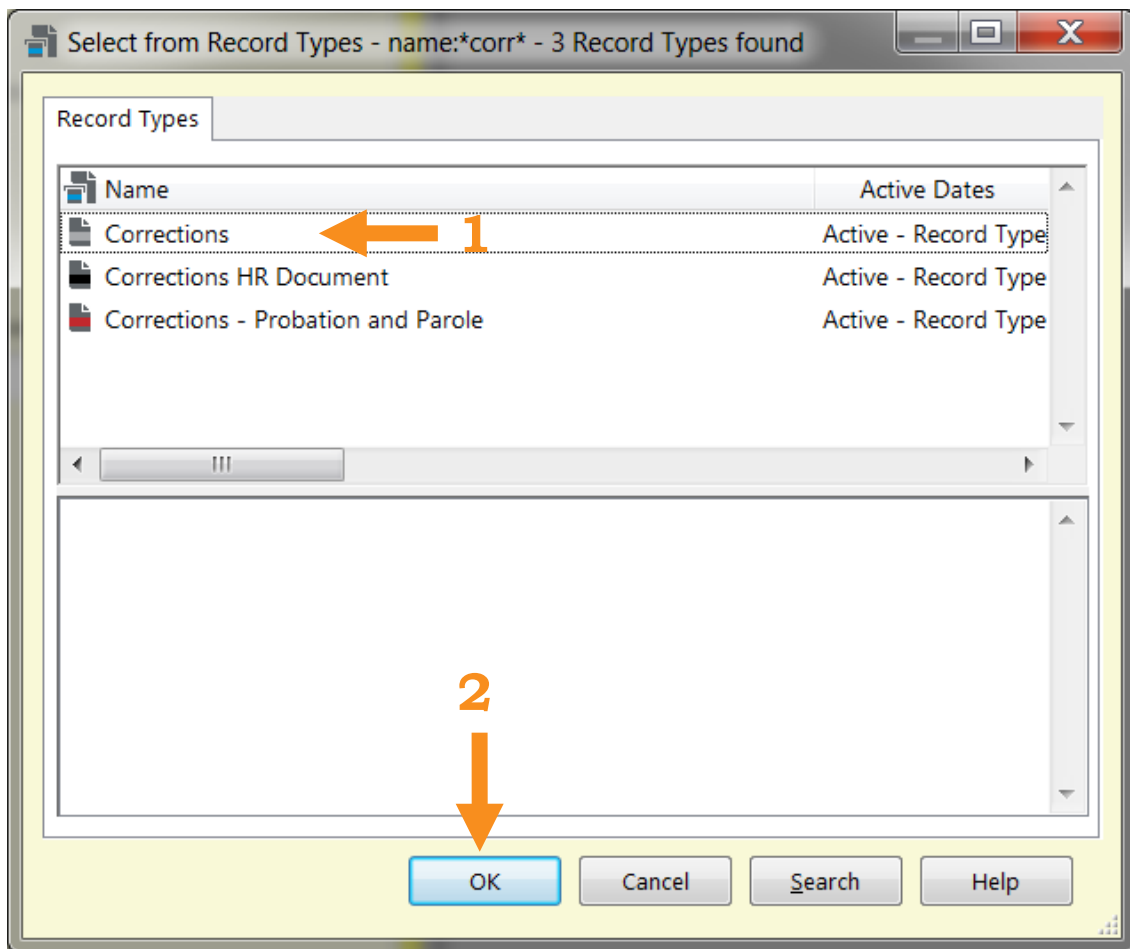
- Otherwise, type part of the **PERTINENT RECORD TYPE** name surrounded by \*s (for example: **\*CORR\***) in **DEFAULT RECORD TYPE** field.
- To narrow down the options, click on the **BLUE FOLDER ICON** .





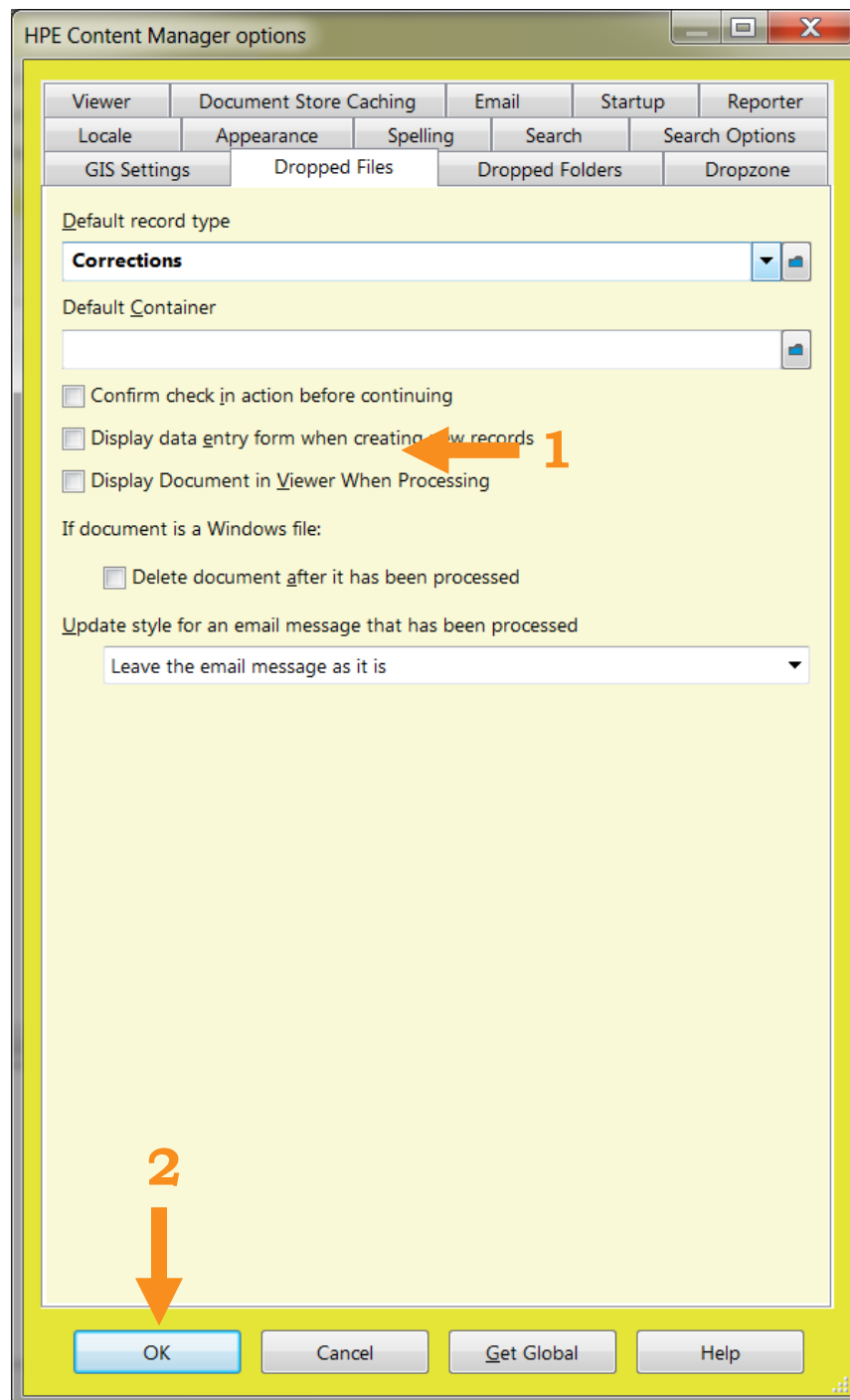
In the **SELECT FROM RECORD TYPES** screen:

- 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**.

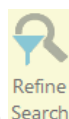
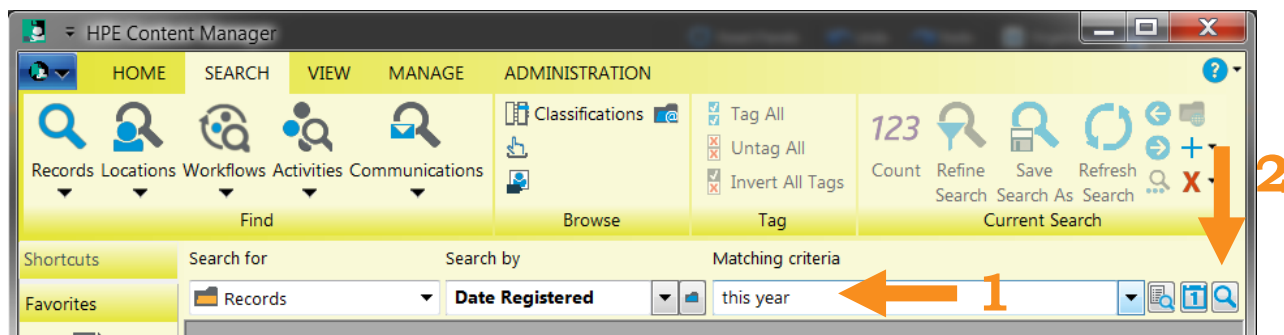


The **DRAG & DROP DEFAULT SETTING** has been selected. In this example it is: **CORRECTIONS DOCUMENT** (this saves some clicks/time).

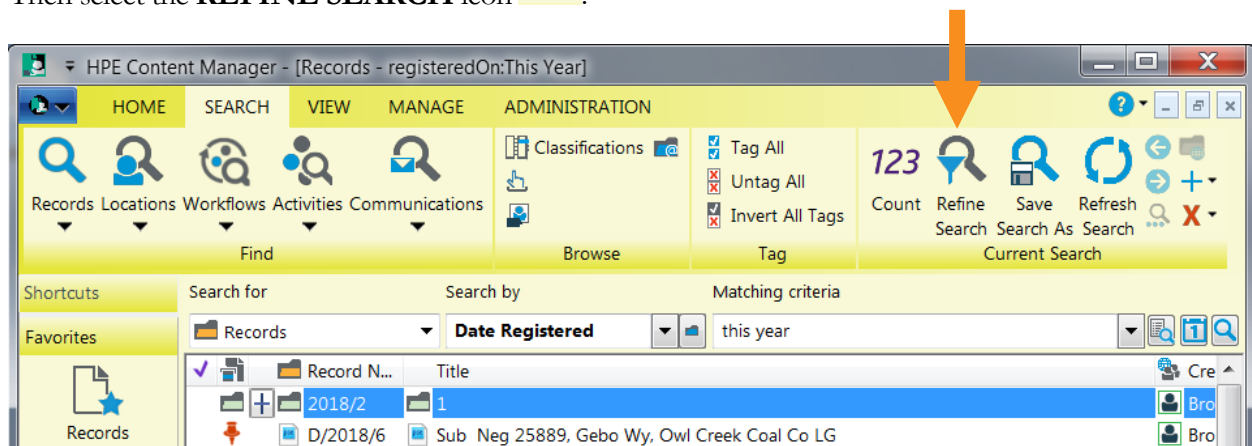
## Search Defaults

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**.

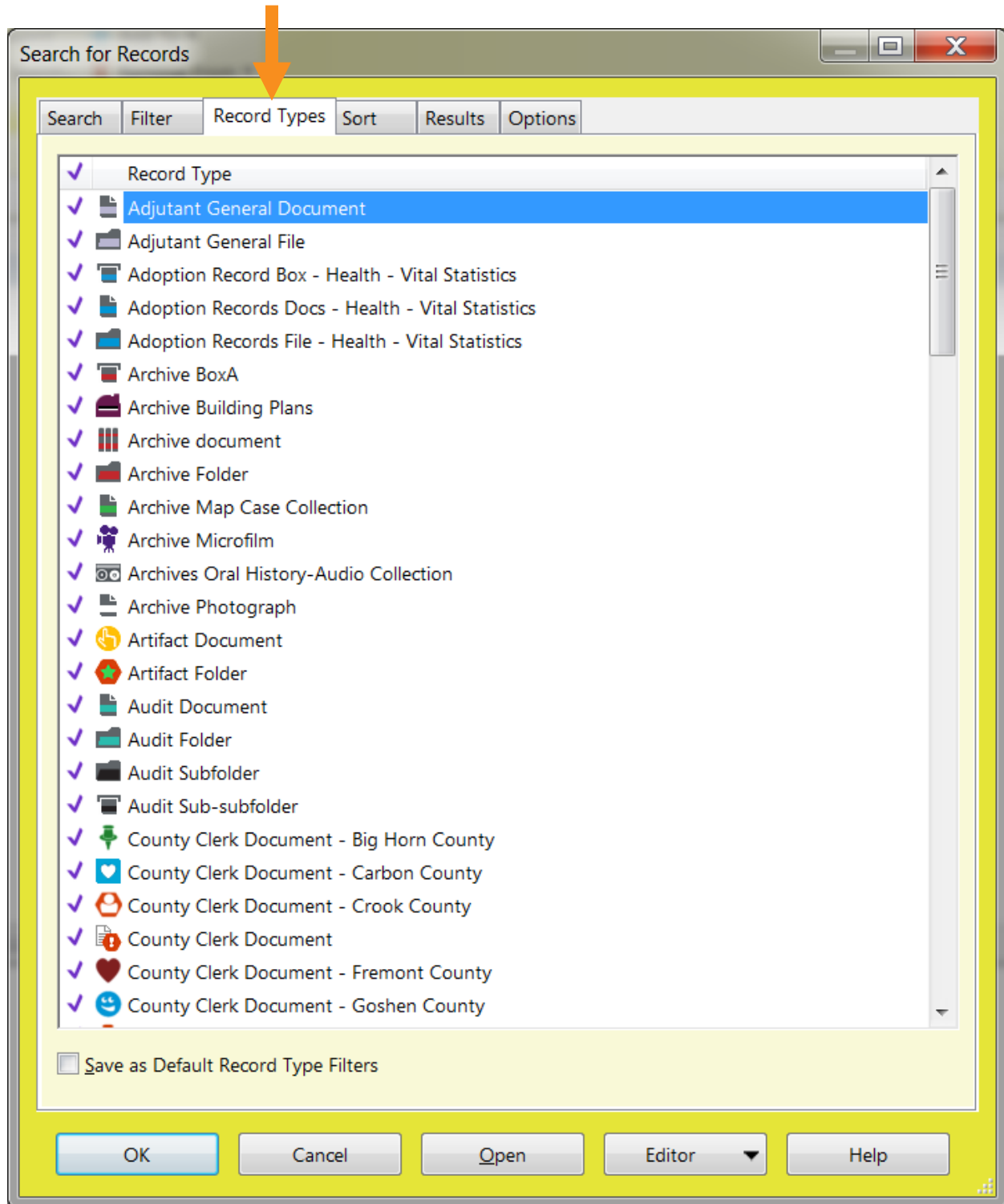


Then select the **REFINE SEARCH** icon.

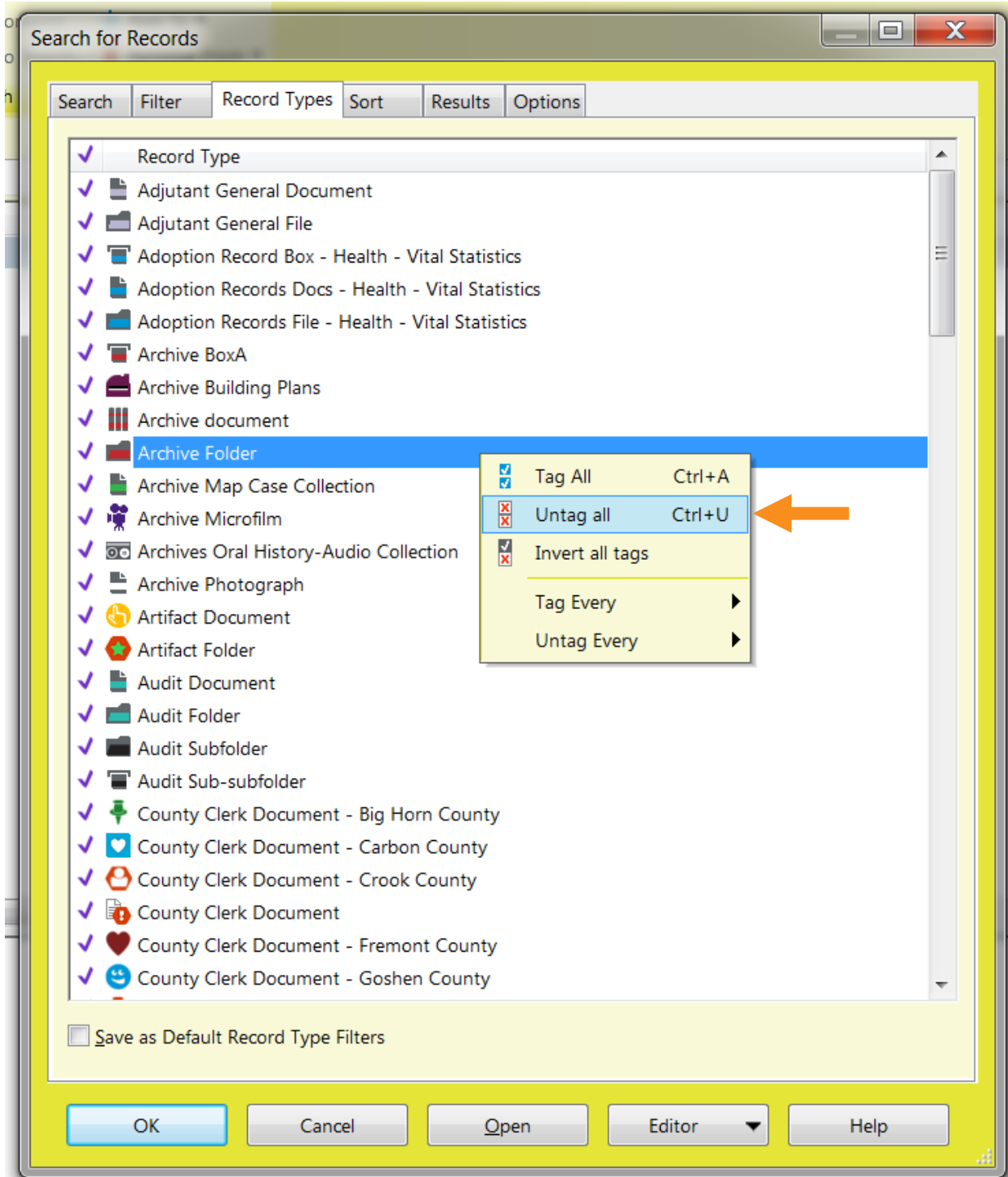


The **SEARCH FOR RECORDS** screen will appear:

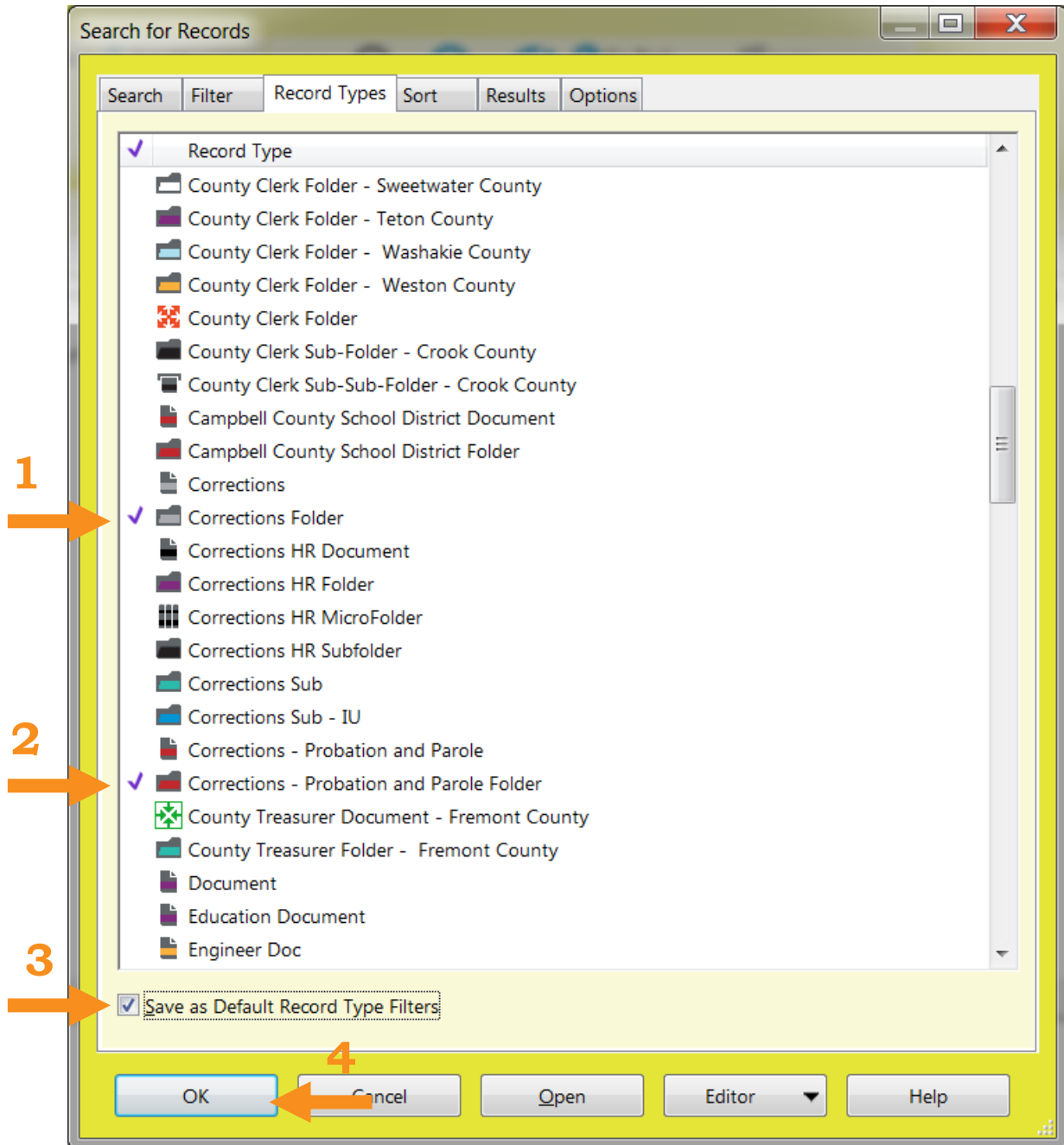
- Select the **RECORD TYPES** tab.



- 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**.

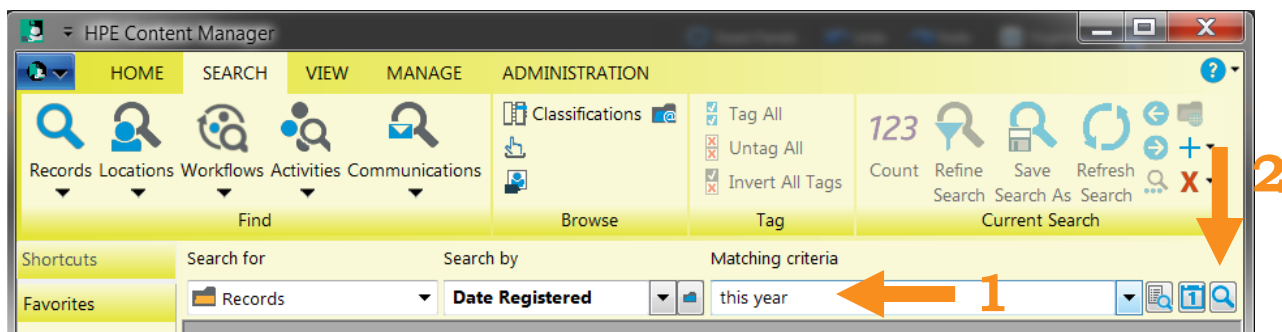


The search defaults have now been set; search results will only include the specified record type/types.

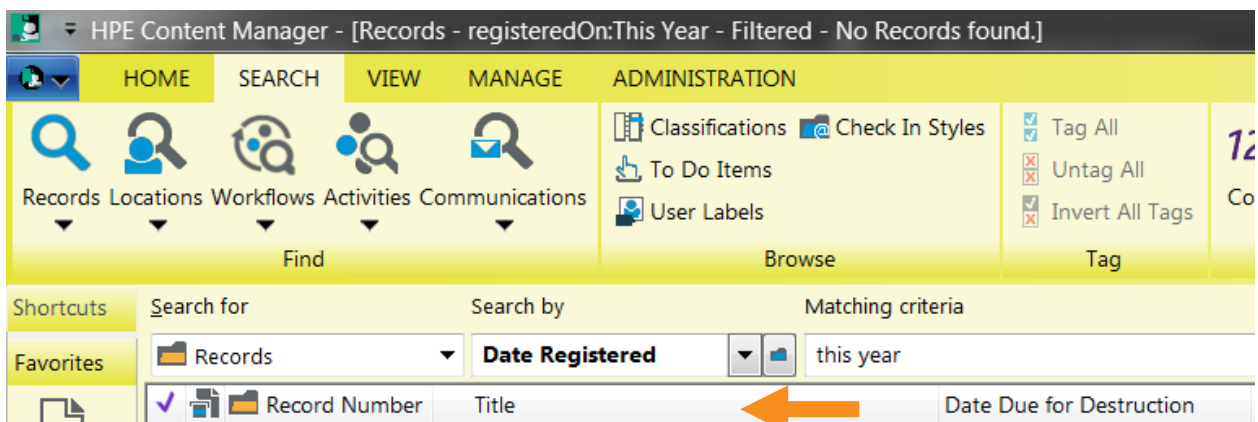
## Changing Column Headings

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

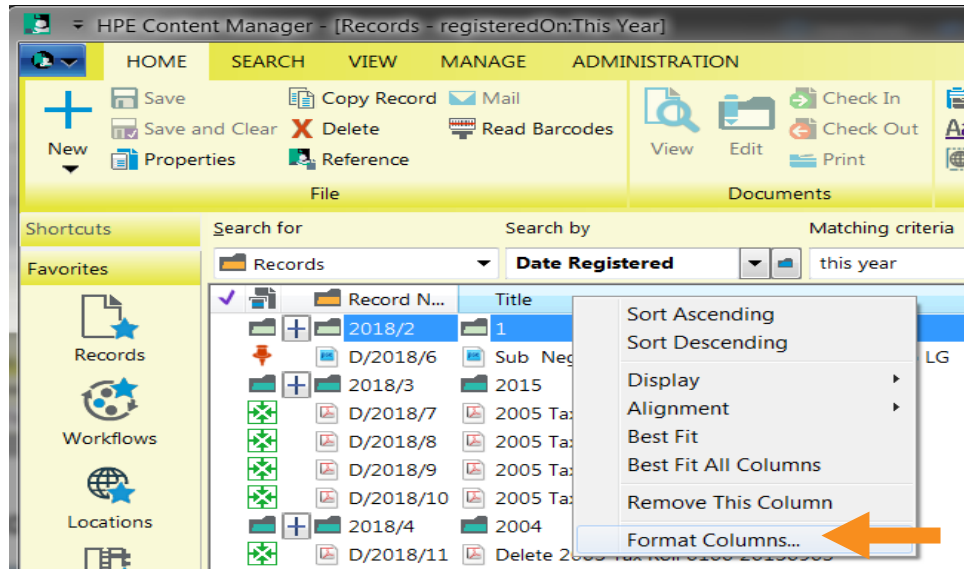
- In the **SEARCH BOX**, enter a general term. In this example the search is for any records **REGISTERED** (added to the Digital Archives) **THIS YEAR**.
- To run the search, select the **MAGNIFYING LENS ICON**  or hit **ENTER**.



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

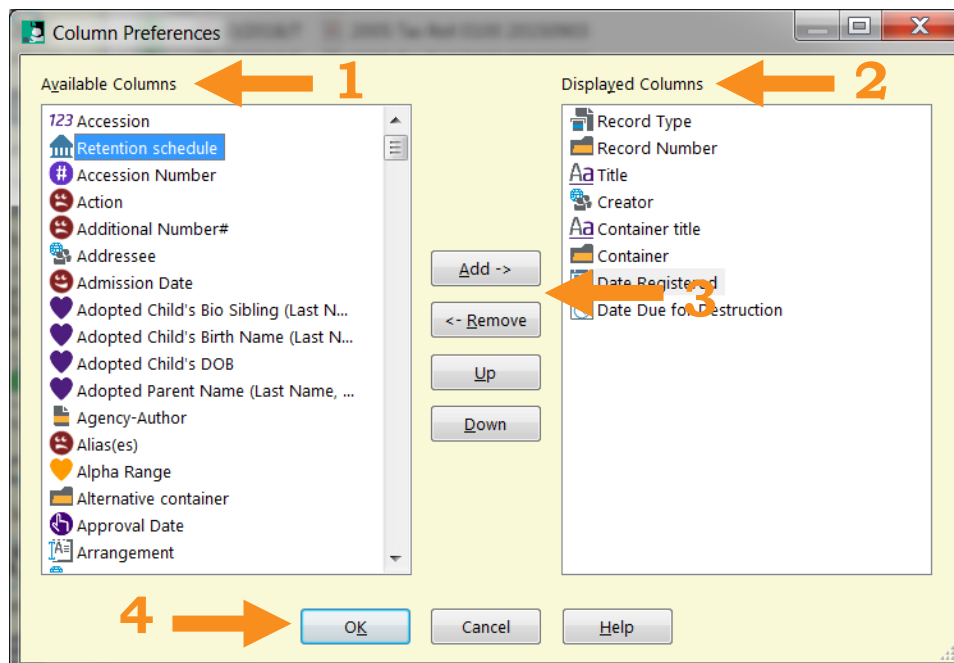


- Select **FORMAT COLUMNS**.



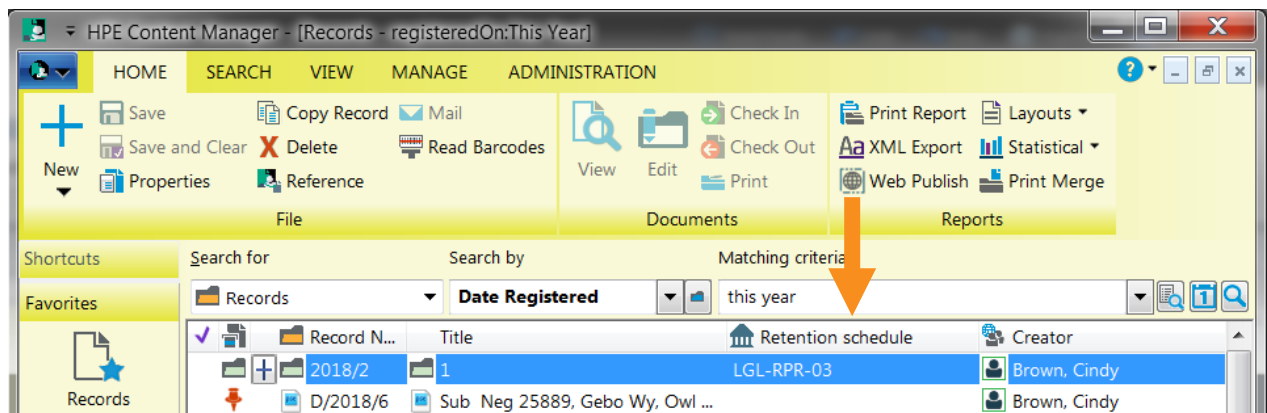
The **COLUMN PREFERENCES** screen will appear with lists of **AVAILABLE COLUMNS** and **DISPLAYED COLUMNS**:

- Select the **COLUMN NAME** from either the Available or Displayed Column list.
- **ADD/REMOVE** the pertinent columns.
- The displayed columns can also be arranged clicking the **UP/DOWN** buttons.
- Click **OK**.






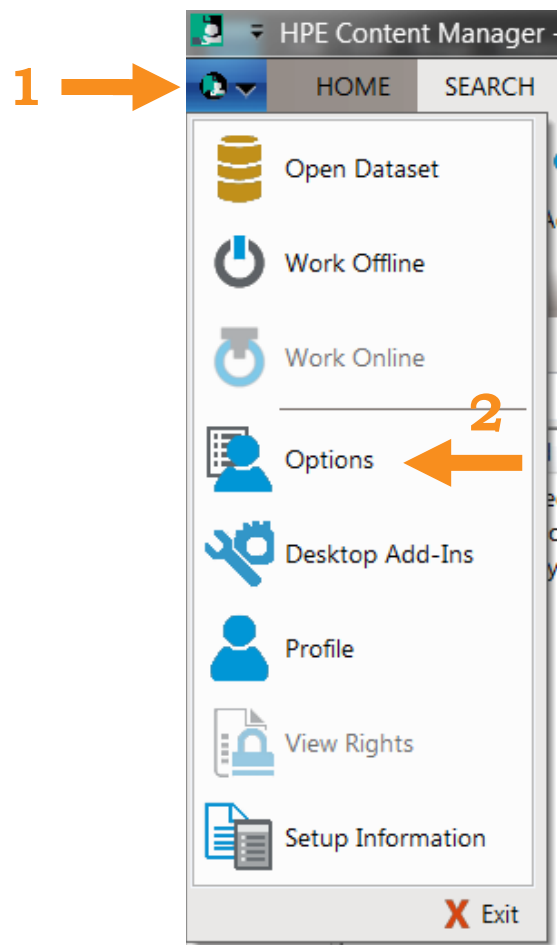
A **NEW** Column has been added to the Search Results. In this example, it's **RETENTION SCHEDULE**.



## Custom Screen Colors

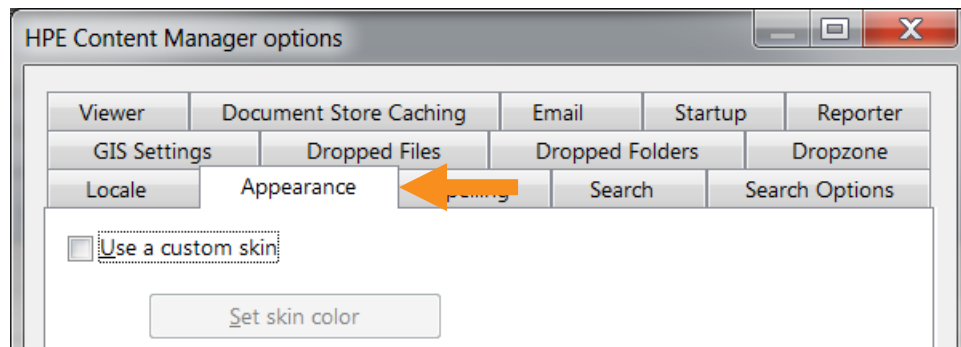
The color of the Digital Archives background screen can be customized to match user preferences. The default setting is shades of blue/gray. To change the color:

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

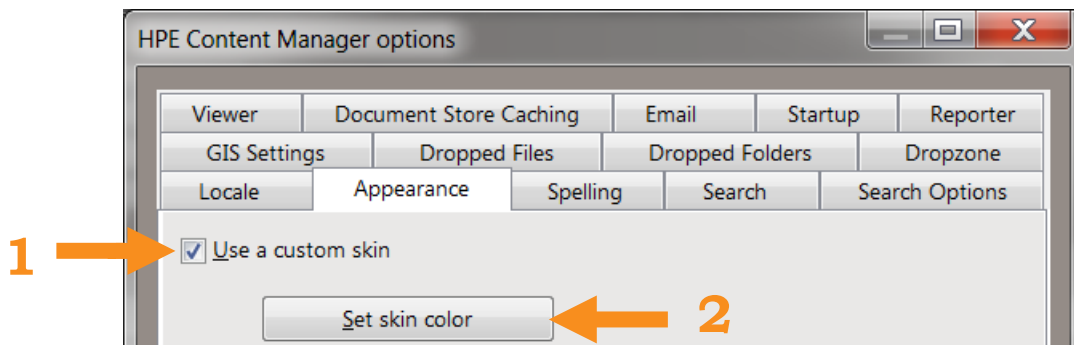


The **HPE CONTENT MANAGER OPTIONS** screen will appear:

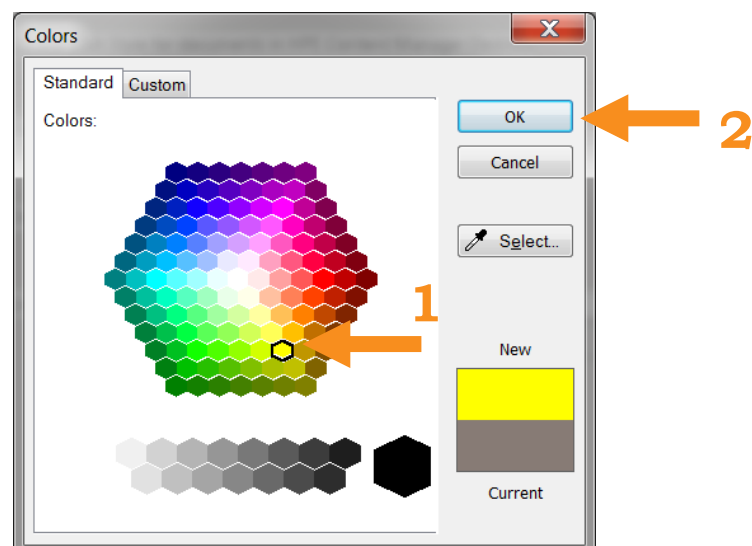
- Select the **APPEARANCE** tab.



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

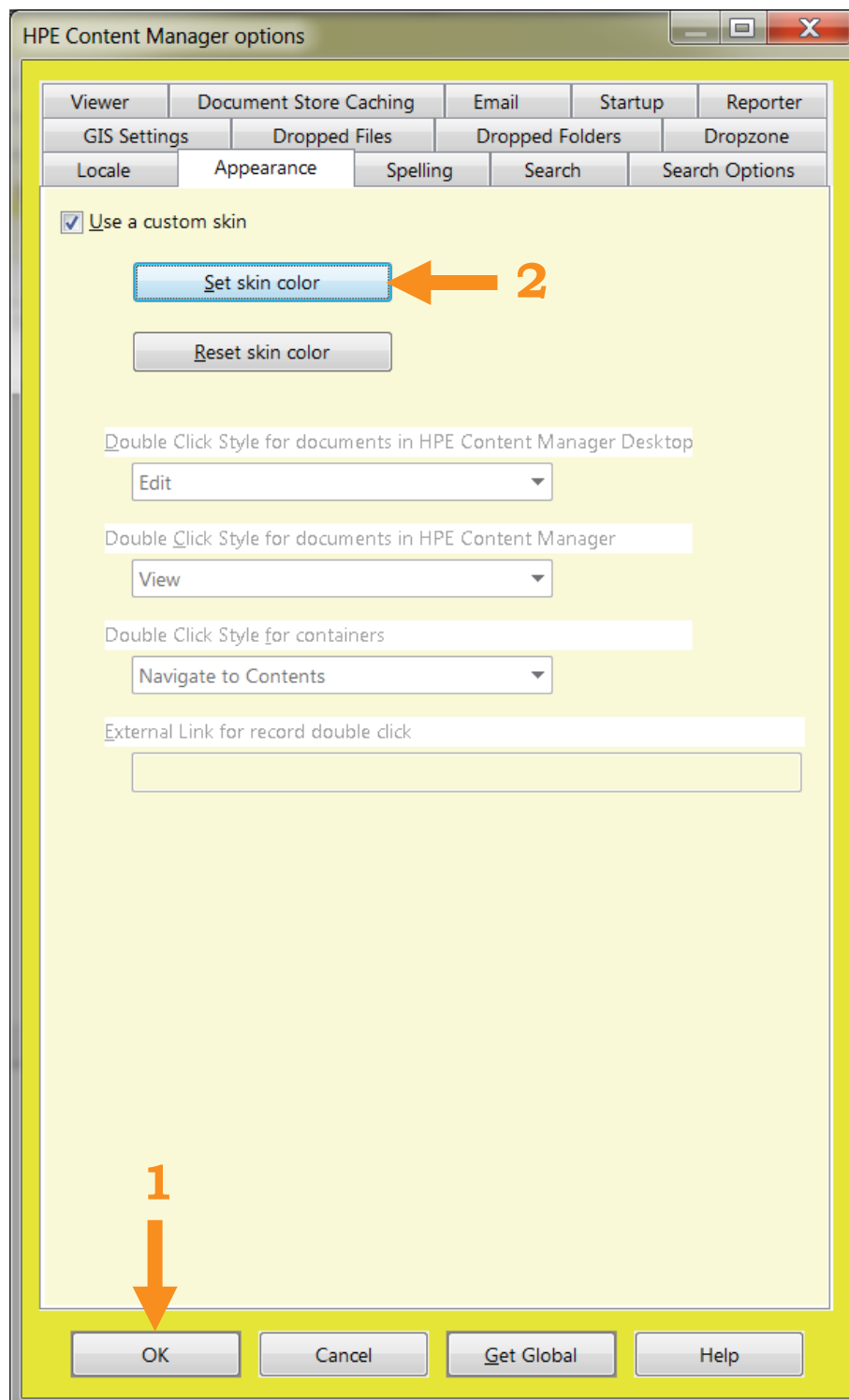


- Tag/Click on any of the color choices.
- Click **OK**.



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**.

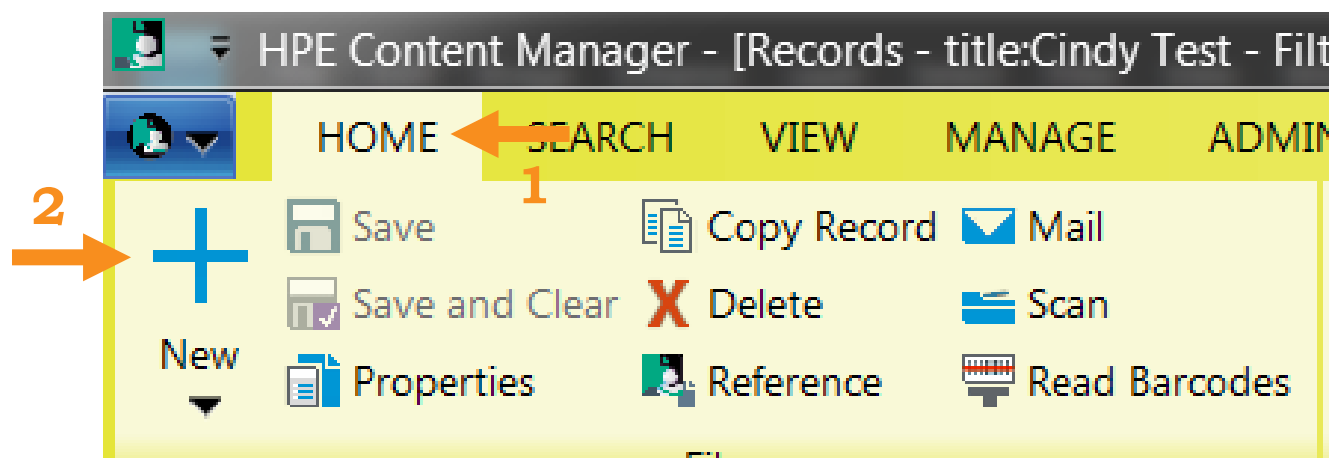


## Creating New Folders - Adding New Folders

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.

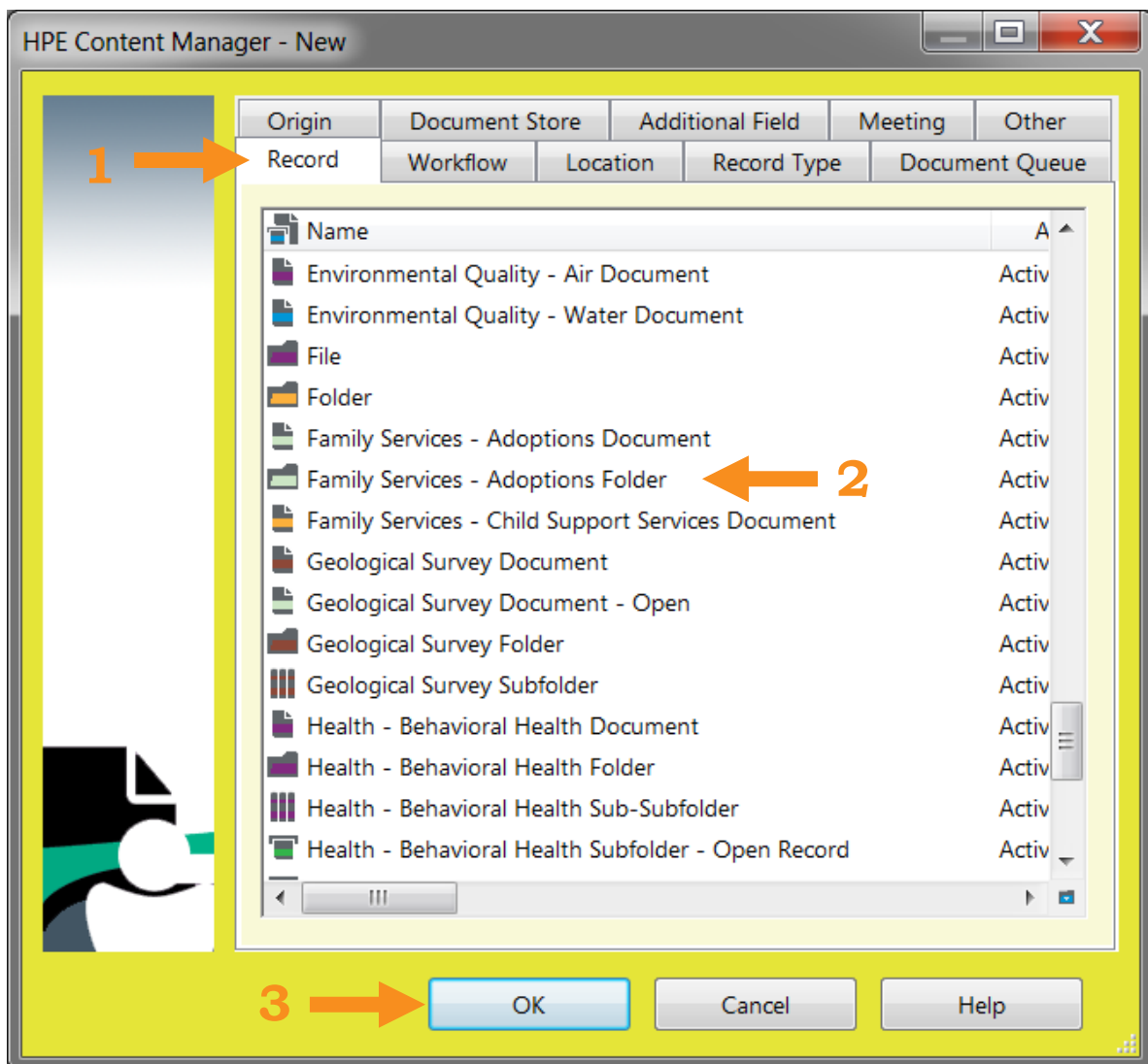
To add a New Folder:

- 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. 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 software window 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 with the number "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 text fields for "Placement Date", "Finalized Date", and "Place of Birth", all of which are empty. At the bottom, there are three buttons: "OK", "Cancel", and "Help". An orange arrow with the number "2" points to the "OK" button.

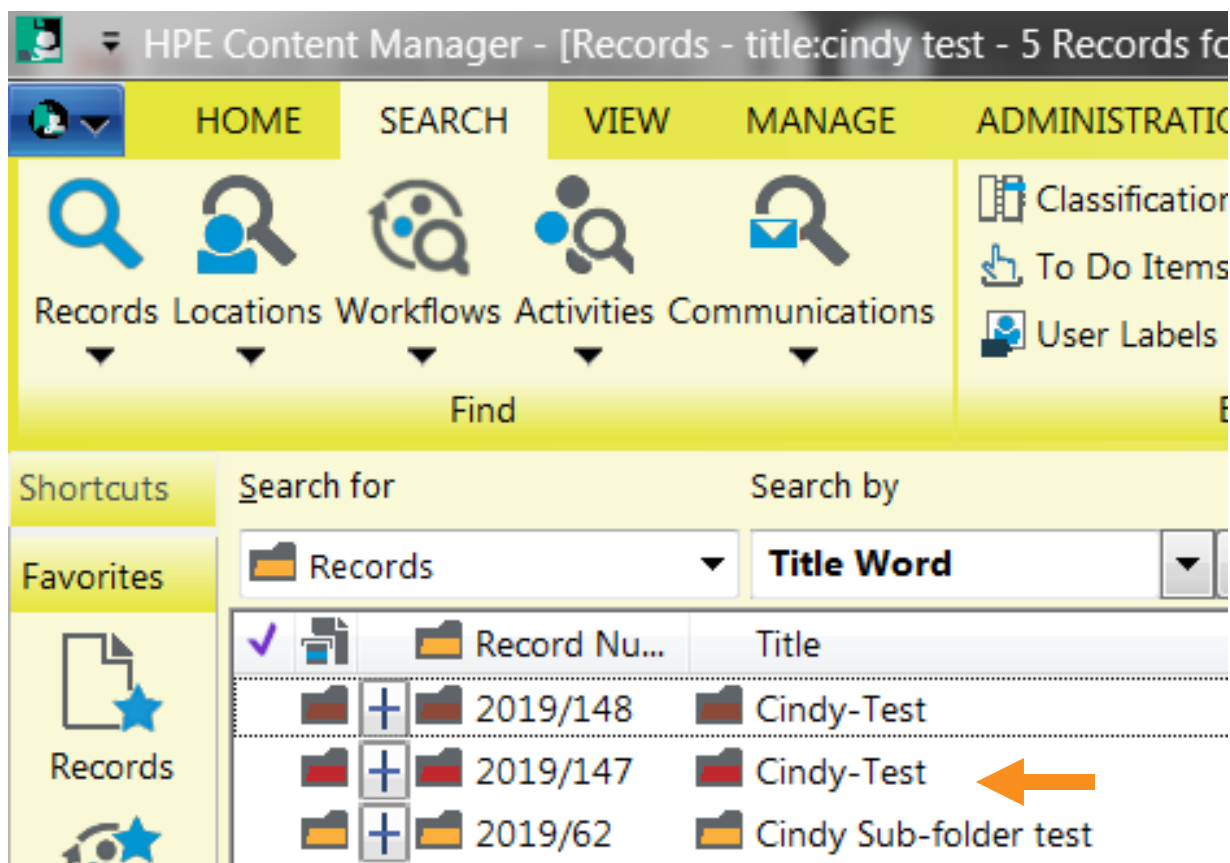
The new folder has been created.

## Creating New Folders - Copying Folders

New Folders can also be created by **COPYING** and then **EDITING** existing folders. 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:

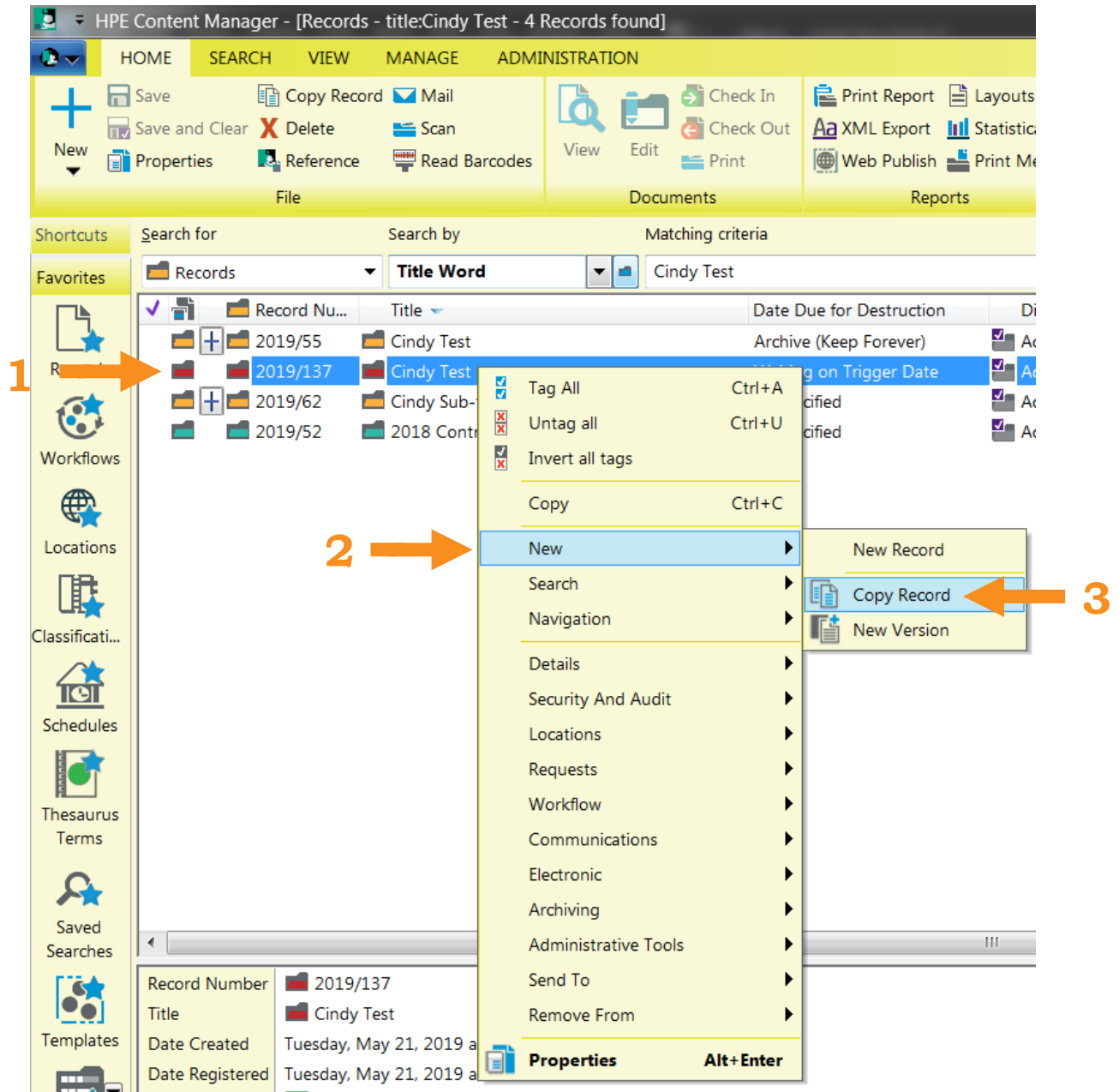
- Search for the existing folder.
- **HIGHLIGHT/SELECT** the folder to copy.





**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

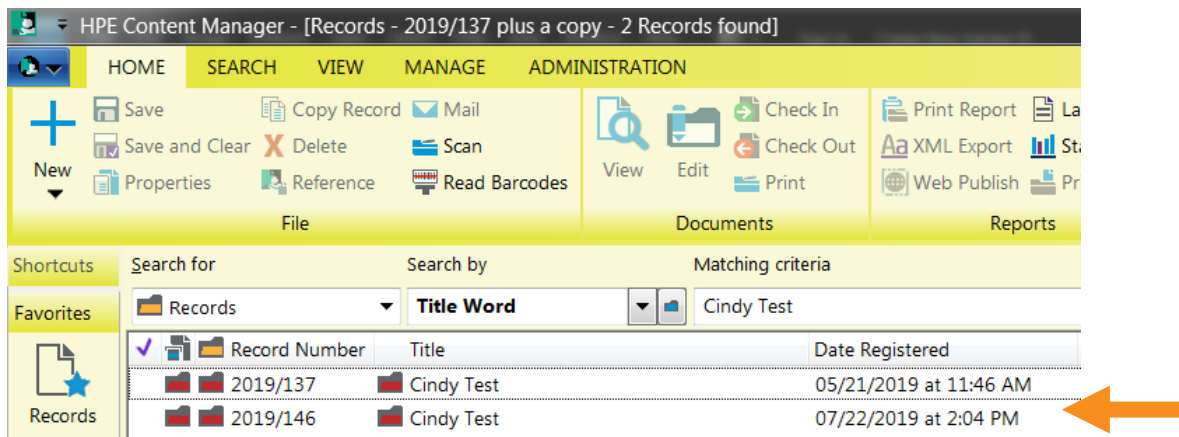
Number of copies

1

☐ Relate the records as 'Original/Copy'

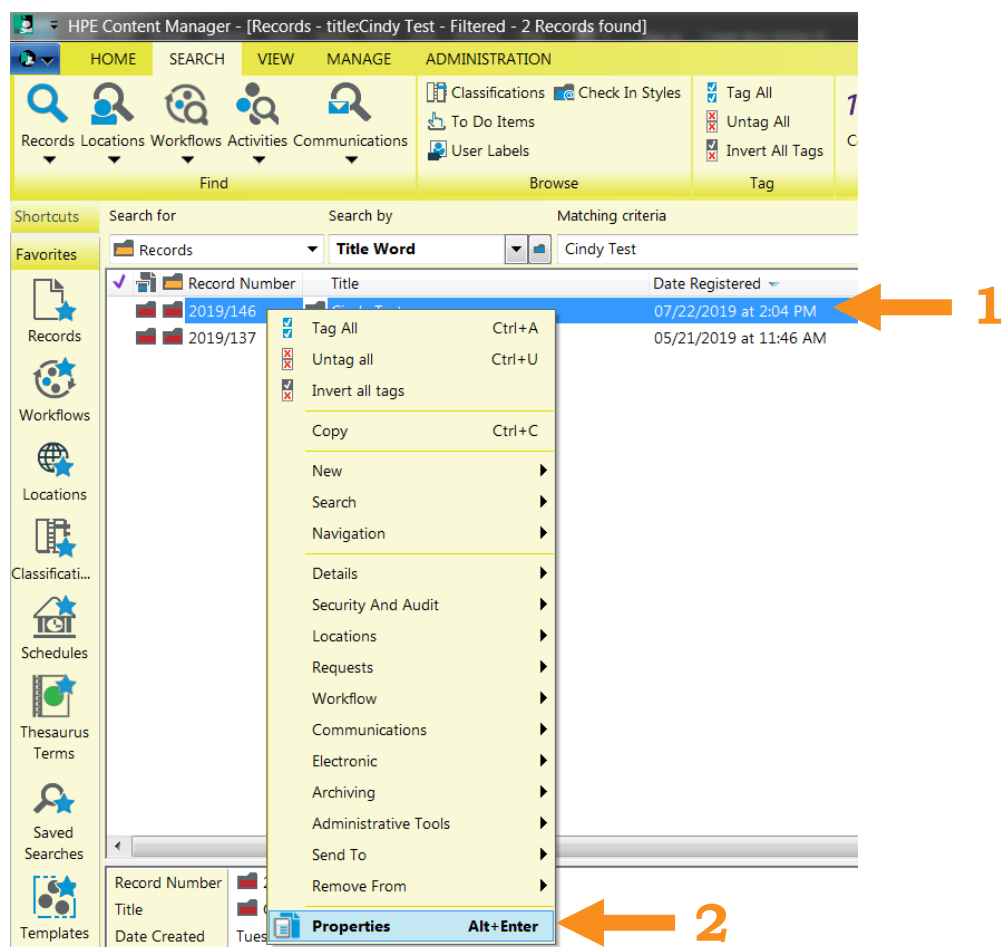
OK Cancel Help

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

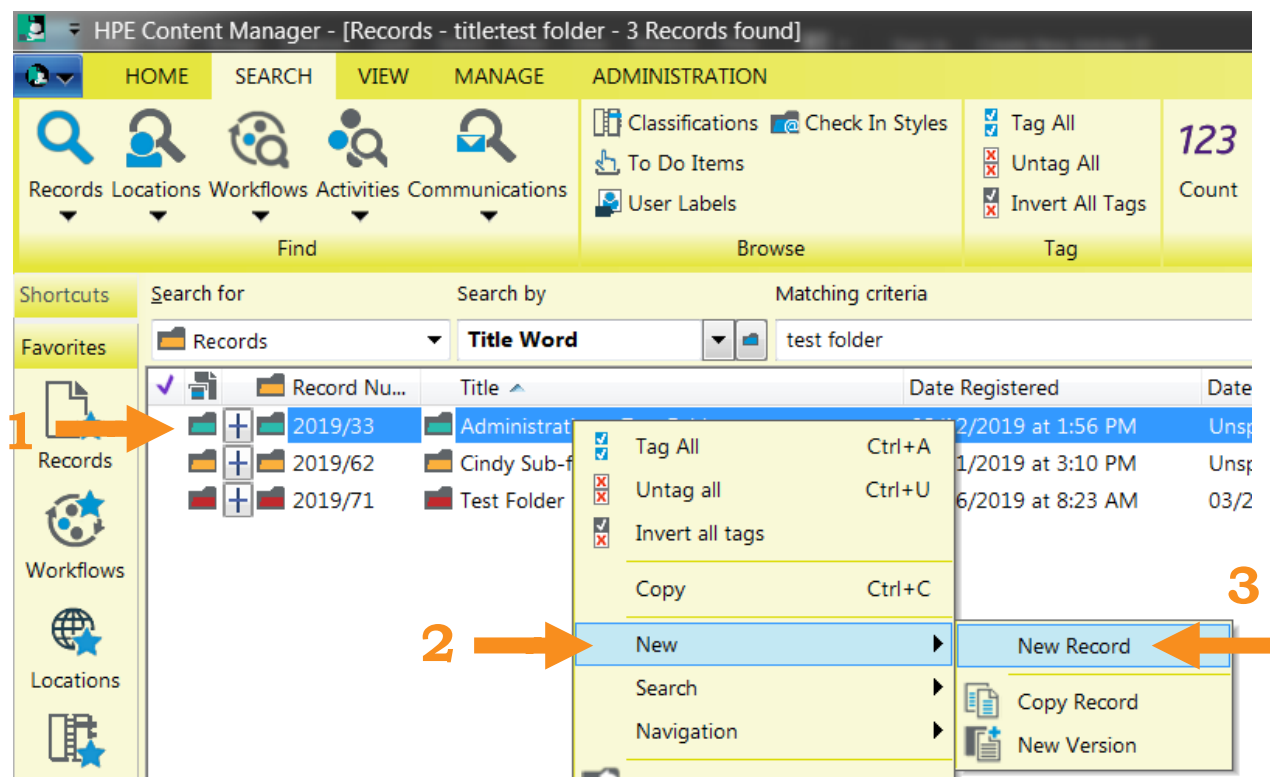
The new folder has been created.

## Creating New Sub-Folders

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

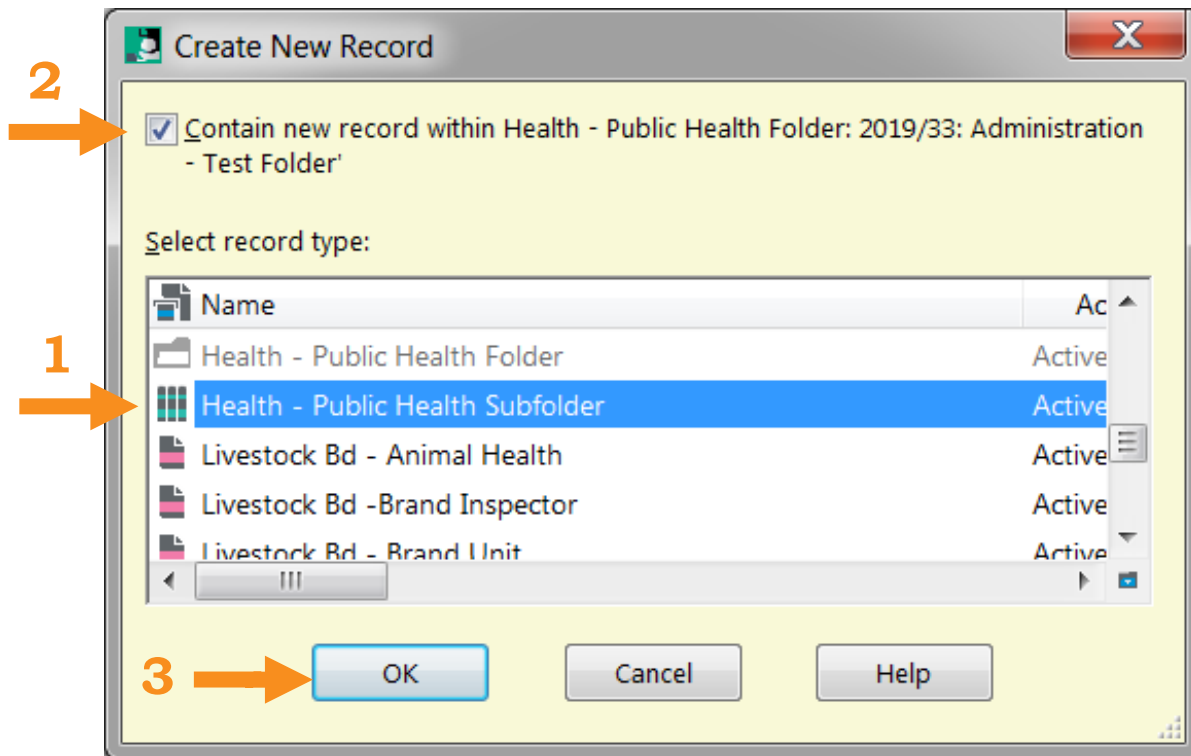
Search for the pertinent folder. Then:

- 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 checked checkbox labeled "Enclosed?". An orange arrow labeled "1" points to the "Notes" field. At the bottom of the dialog, there are three buttons: "OK", "Cancel", and "Help". 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.)

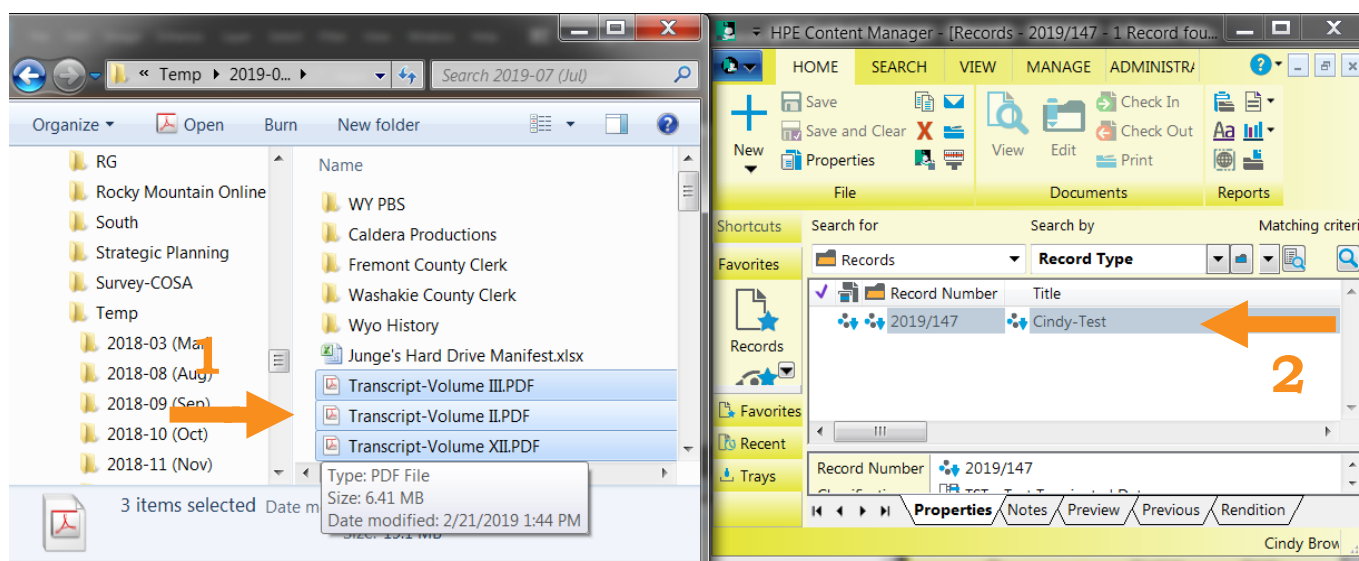
## Adding Documents - Dragging & Dropping

Documents can be dragged and dropped into folders in the Digital Archives, using the steps below:

- **NOTE:** make sure the appropriate **DRAG & DROP DEFAULT RECORD TYPE OPTION** is set to the agency **DOCUMENT TYPE** ([see additional information above](#)).
- Highlight/Select the **DOCUMENTS** on the user's network/computer drive to be added to the Digital Archives.

Note: It is recommended that the user's network/computer folder is **NOT JUST** highlighted. The folder should be expanded, because if there are any sub-folders - their contents will not automatically be included with the dragged and dropped documents.

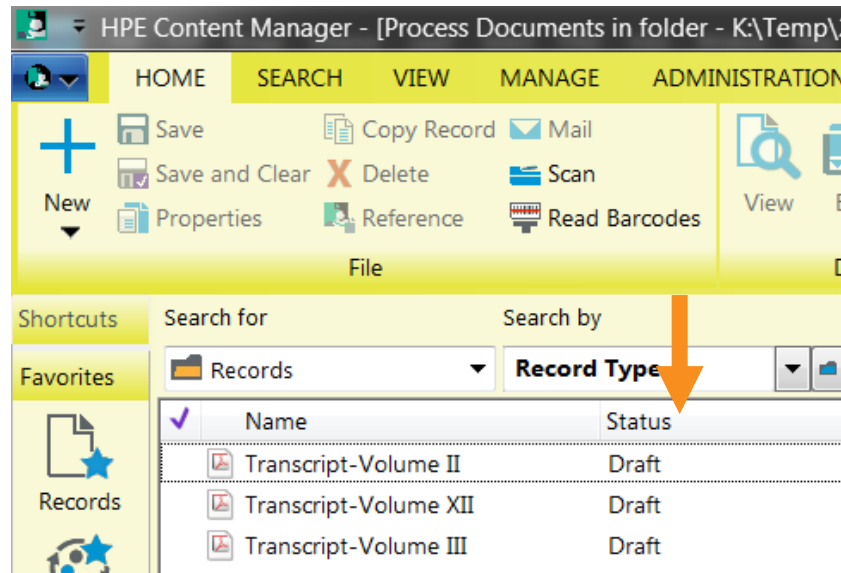
- Locate the **CORRESPONDING FOLDER** in the Digital Archives.
- **DRAG & DROP** the user's network/computer documents directly onto the corresponding **FOLDER** in the Digital Archives.





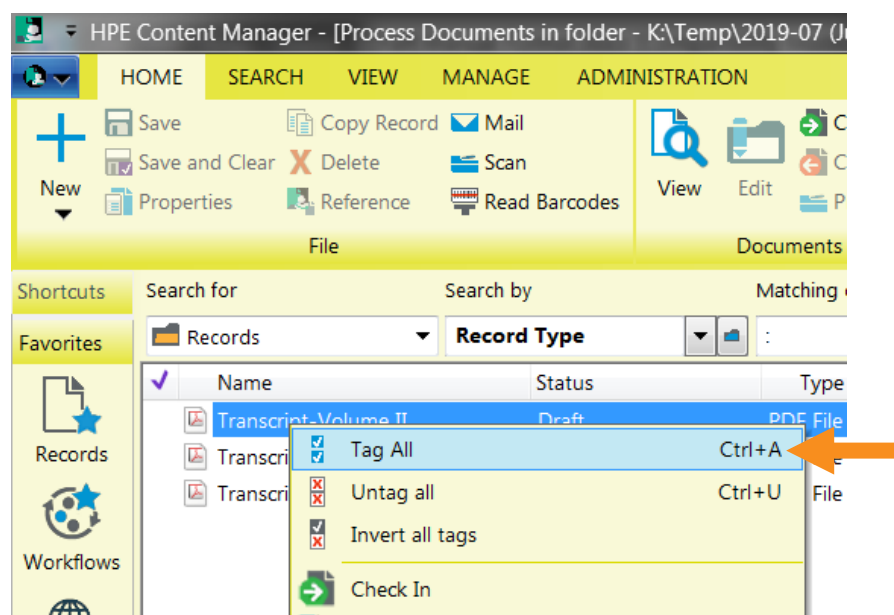
Note: if only **one** document is dragged and dropped, it will automatically be added to the folder. Otherwise:

- The **PROCESS DOCUMENTS IN FOLDER** screen will appear (if more than one document was dragged and dropped).
- The document status will appear as **DRAFT**.

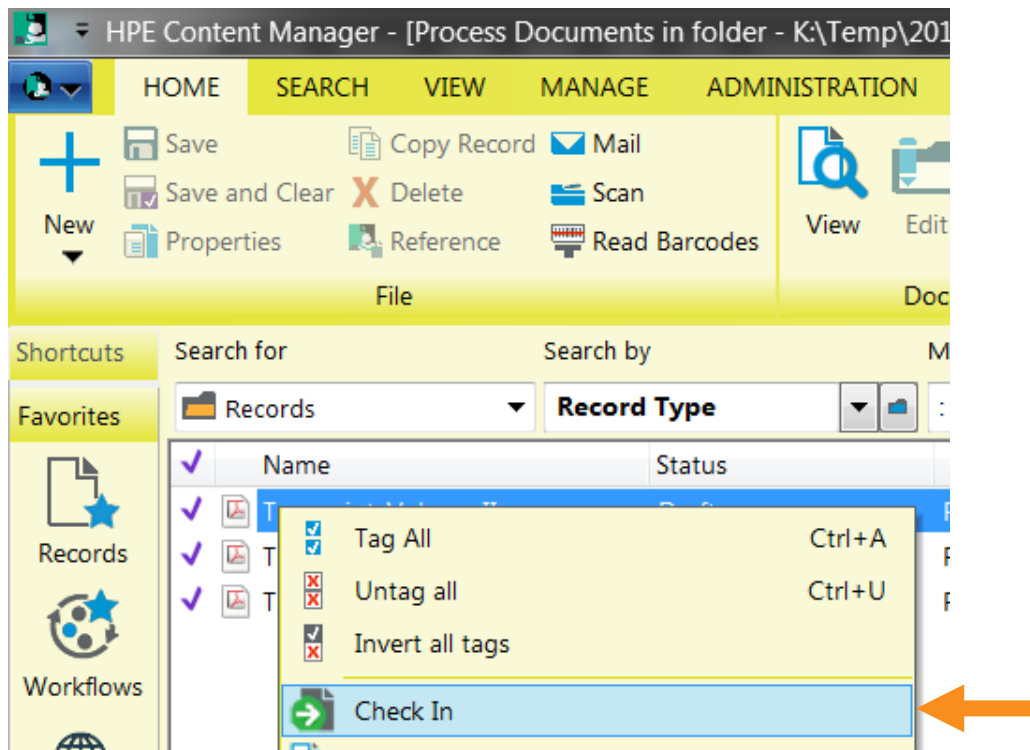


To **PROCESS THE ITEMS IN THE FOLDER** or **CHECK IN** the records:

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

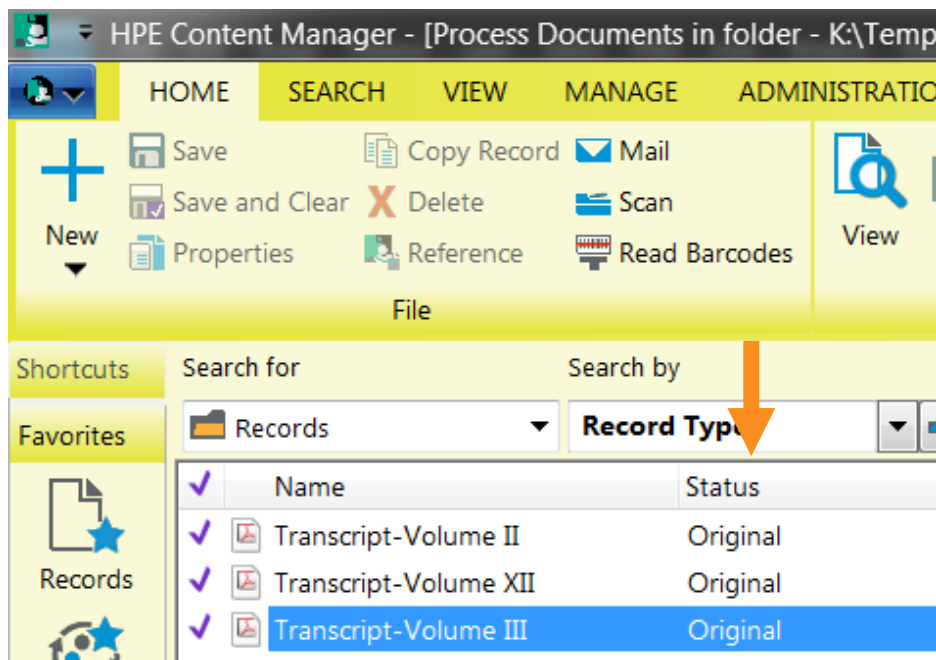


- Then **RIGHT-CLICK** on any of the documents again.
- Select **CHECK IN**.

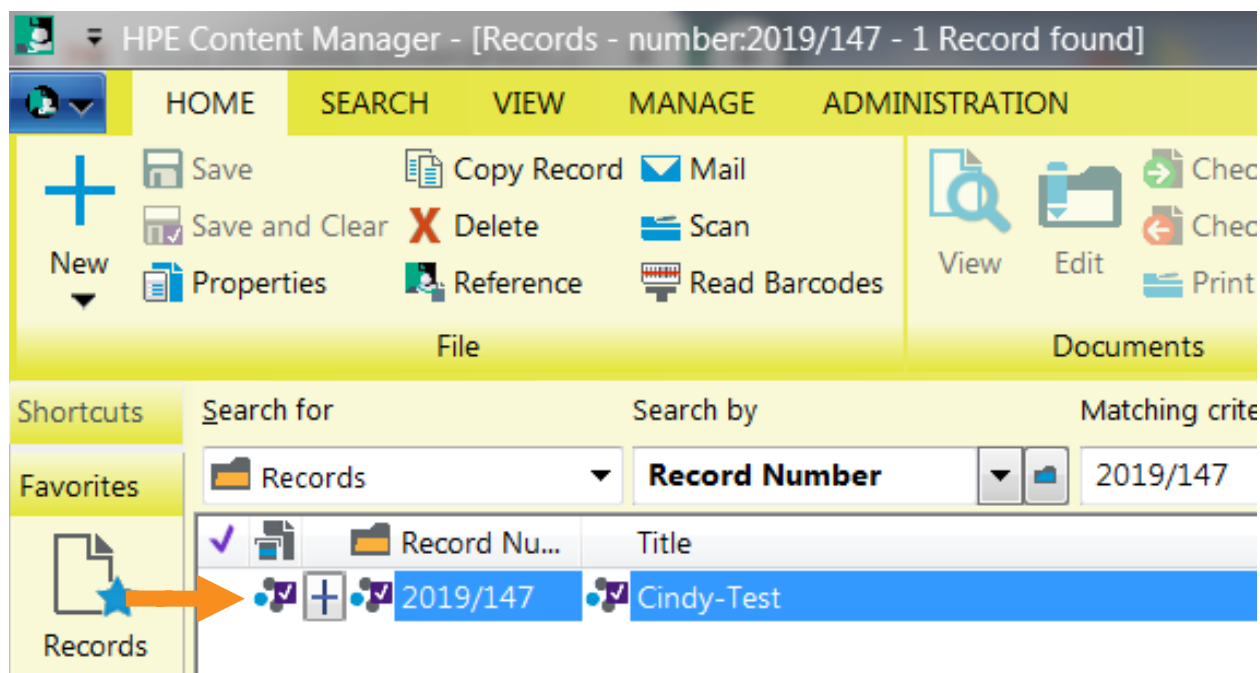


The **DOCUMENTS** have been processed/added to the Digital Archives.




- **NOTE:** the Status column info has changed from **DRAFT** to **ORIGINAL**

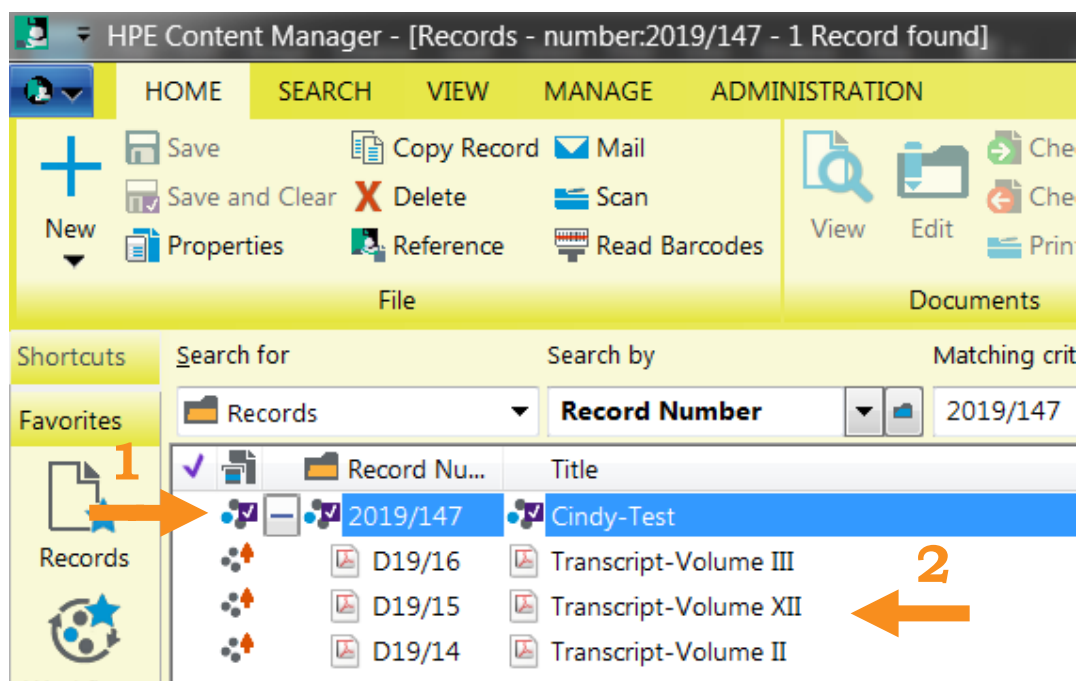


The documents are now in the Digital Archives **FOLDER** where they were dropped.



To see the documents within the folder:

- Click on/Expand the  icon.
- The  icon will change to the  icon, and the documents will be listed on the screen.



## 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 set up the Document Queue in the Digital Archives. 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. However, the default settings on the Document Queue can be set up to select a specific folder (container). But the default settings will need to be **updated every time** a different folder is required.

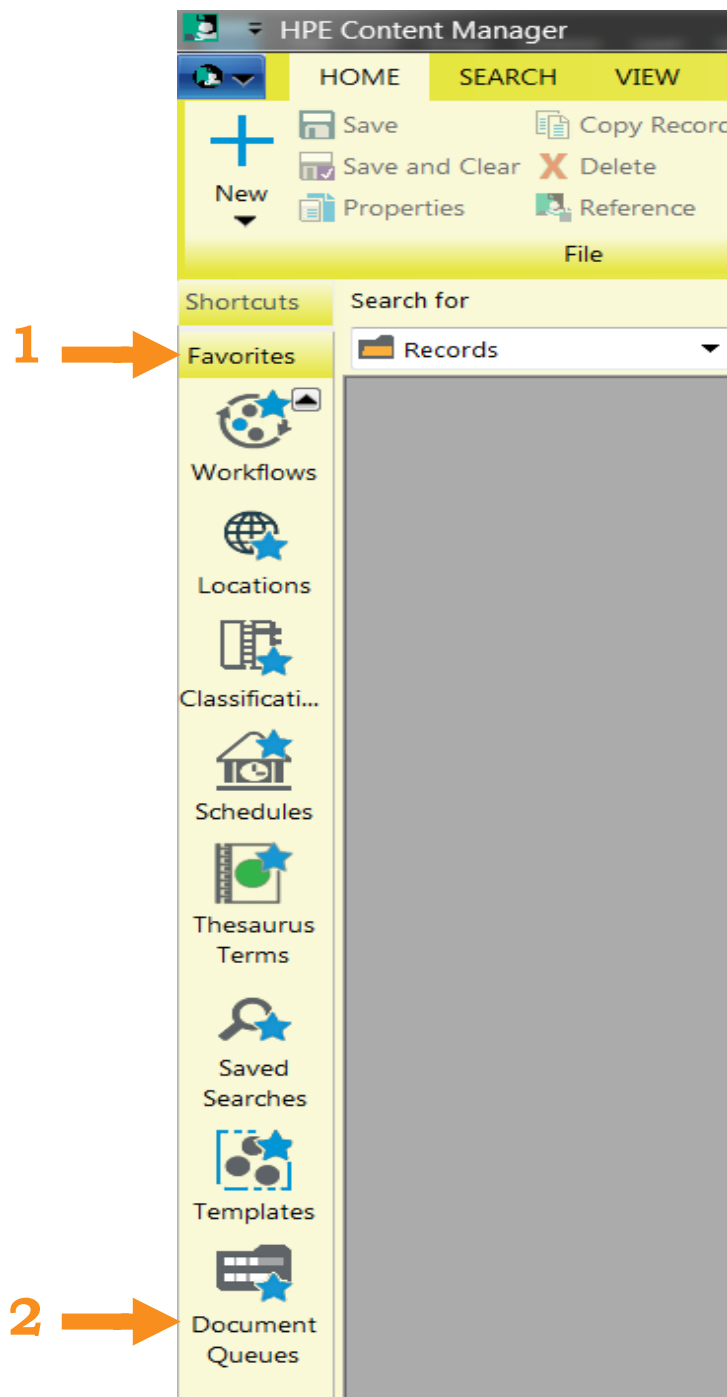
Therefore, unless the same folder is consistently used, it may be easier to use the Drag & Drop method of adding documents to the Digital Archives.

There are two options for processing the Document Queue:

- Option 1: [Accessing the Document Queue within the Digital Archives](#).
- Option 2: [Accessing the Document Queue on the user's computer](#).

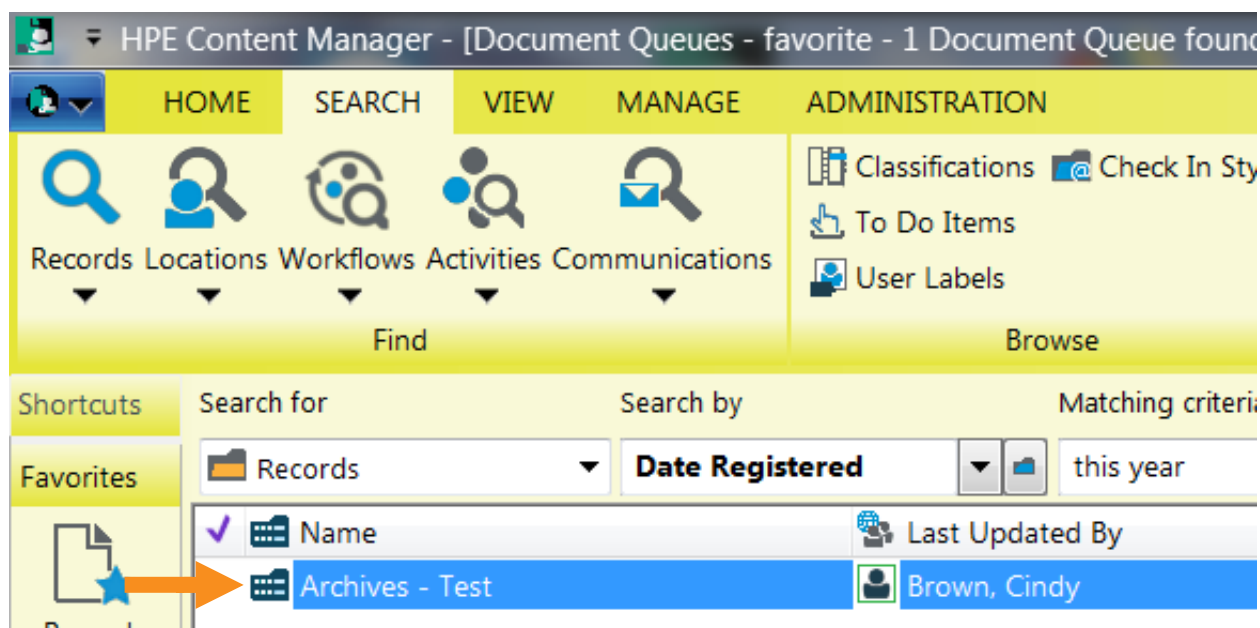
## OPTION 1, USING THE DOCUMENT QUEUE WITHIN THE DIGITAL ARCHIVES:

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

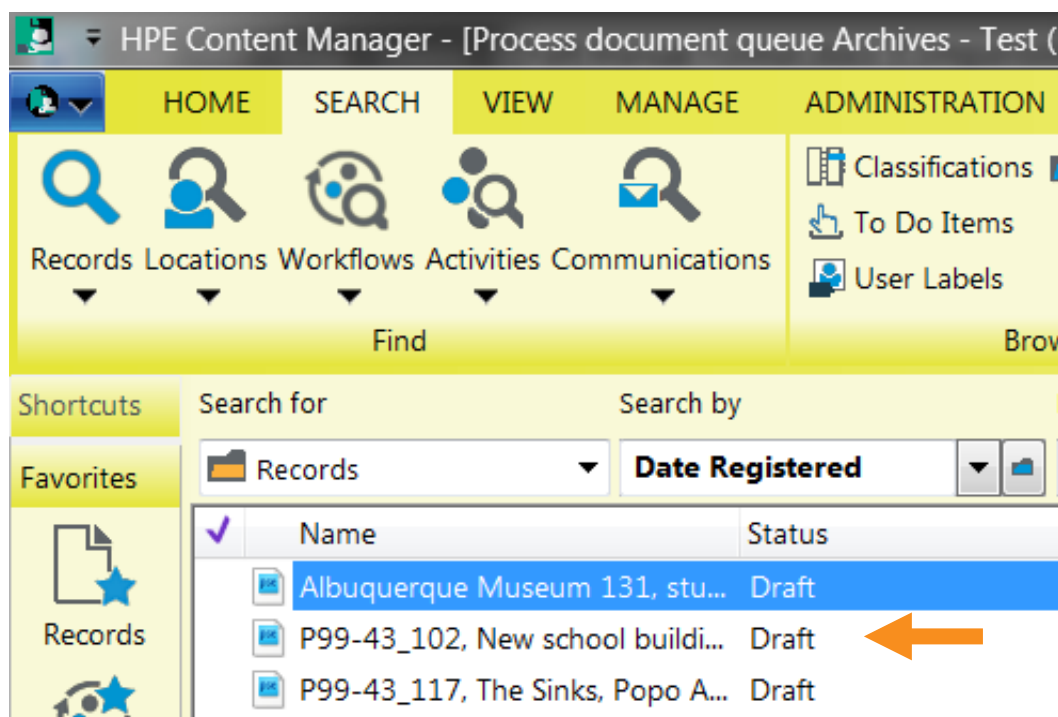


The **DOCUMENT QUEUE** will appear on the screen:

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

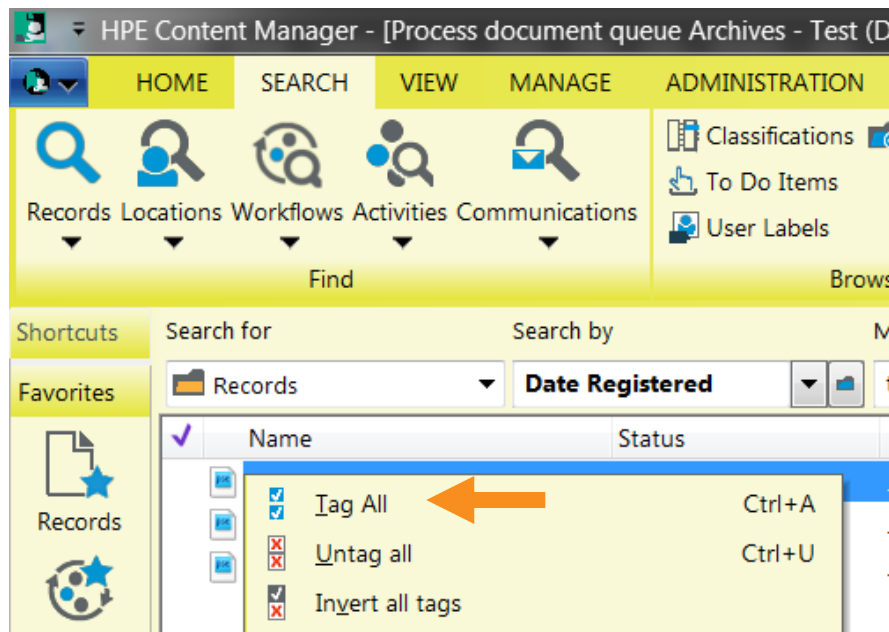


The records from the computer/network **DOCUMENT QUEUE** should appear on the **PROCESS DOCUMENT QUEUE** list:



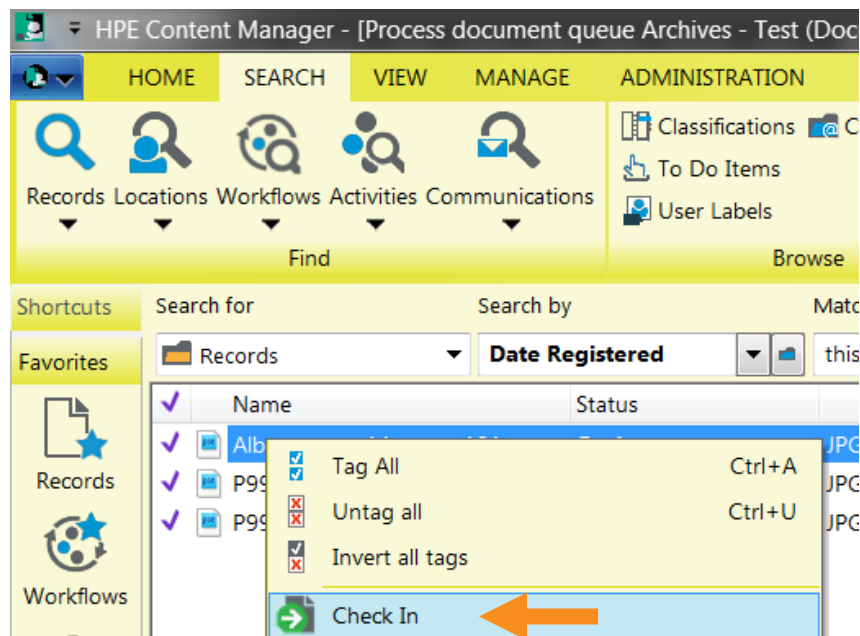
To select the records in the Document Queue:

- **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.



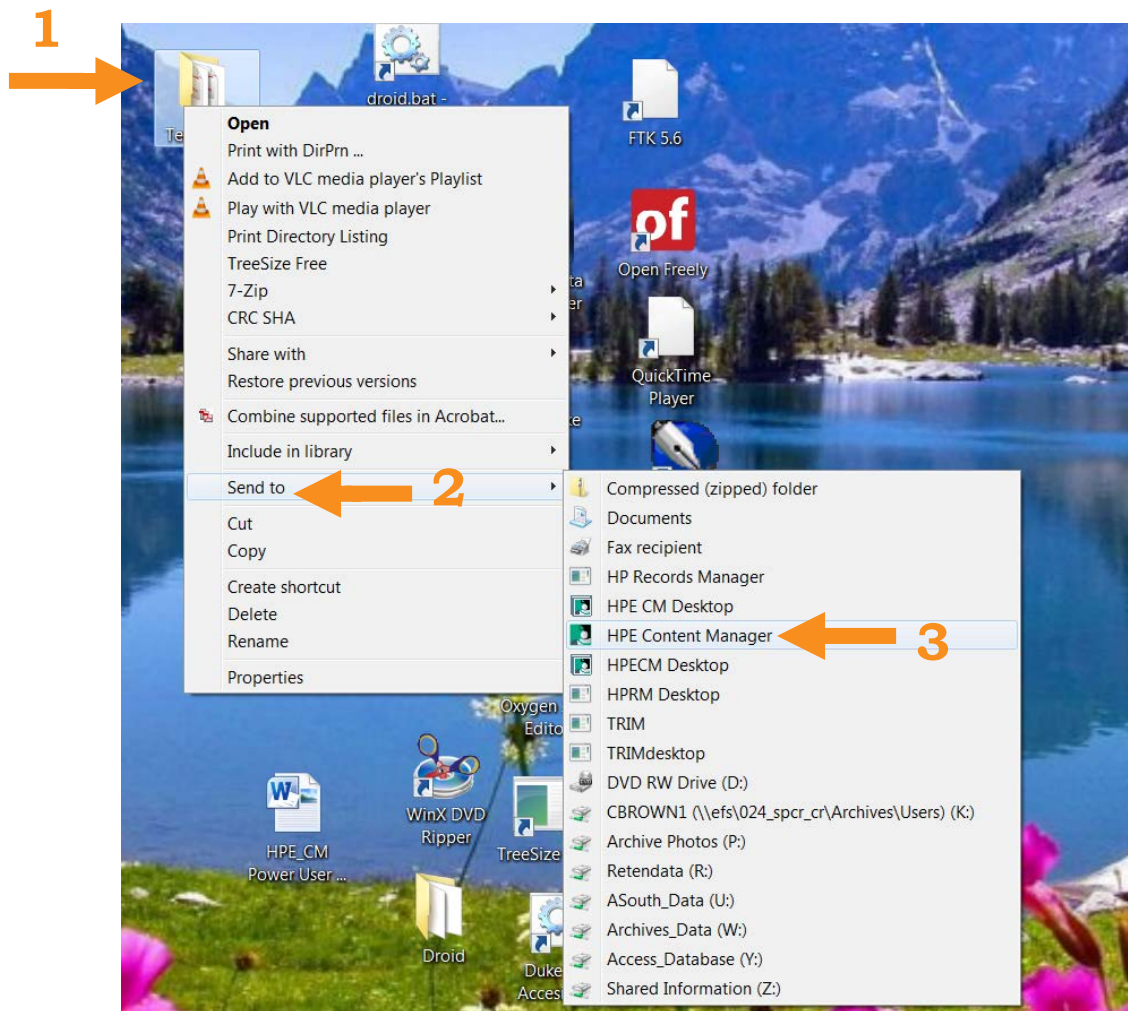
## OPTION 2, PROCESSING THE DOCUMENT QUEUE FROM THE COMPUTER /NETWORK FOLDER

- Move copies of records into the user's computer/network queue folder.

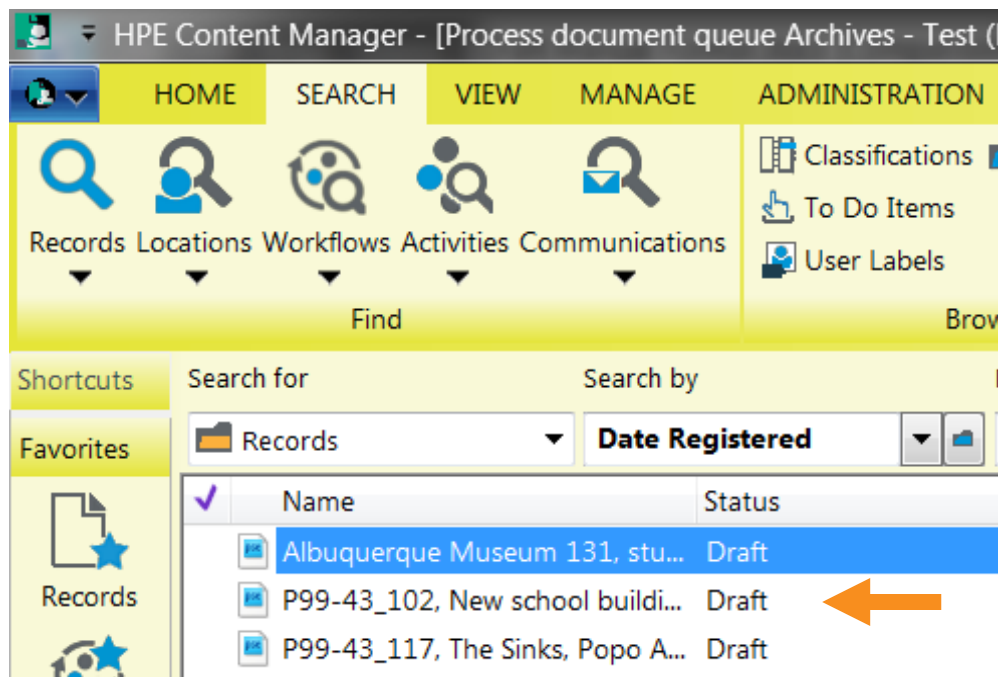
**PREP WORK:** The **DEFAULT RECORD TYPE** will need to be in place prior to processing the document queue. For instructions see the [Default Drag and Drop Settings](#) above. (**Note:** the records from the user's computer/network queue folder will **NOT** be **DELETED** as they're being processed. The user will need to clear out the folder once the records have been added to the Digital Archives.)

To process the Document Queue:

- **RIGHT-CLICK** on the **QUEUE FOLDER** on the **USER'S COMPUTER**.
- Select **SEND TO**.
- Click on **HPE CONTENT MANAGER**.

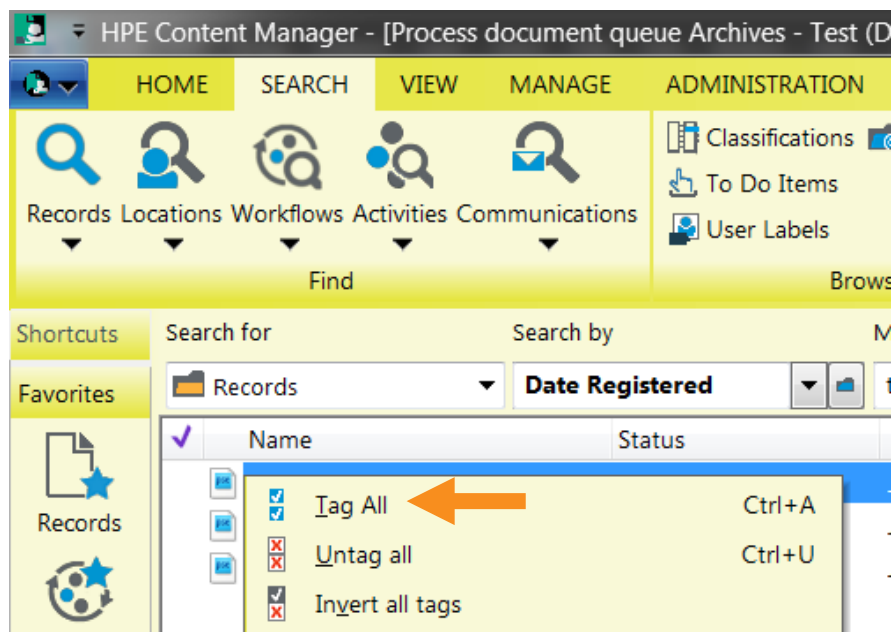


The records from the computer/network **DOCUMENT QUEUE** should appear on the **PROCESS DOCUMENT QUEUE** list:



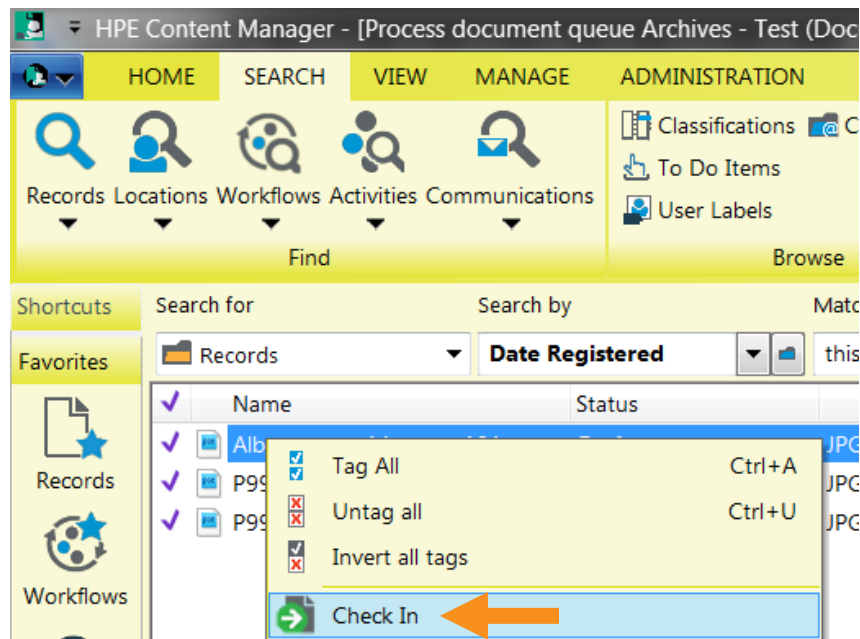
To **SELECT/TAG** all of the records in the Document Queue:

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

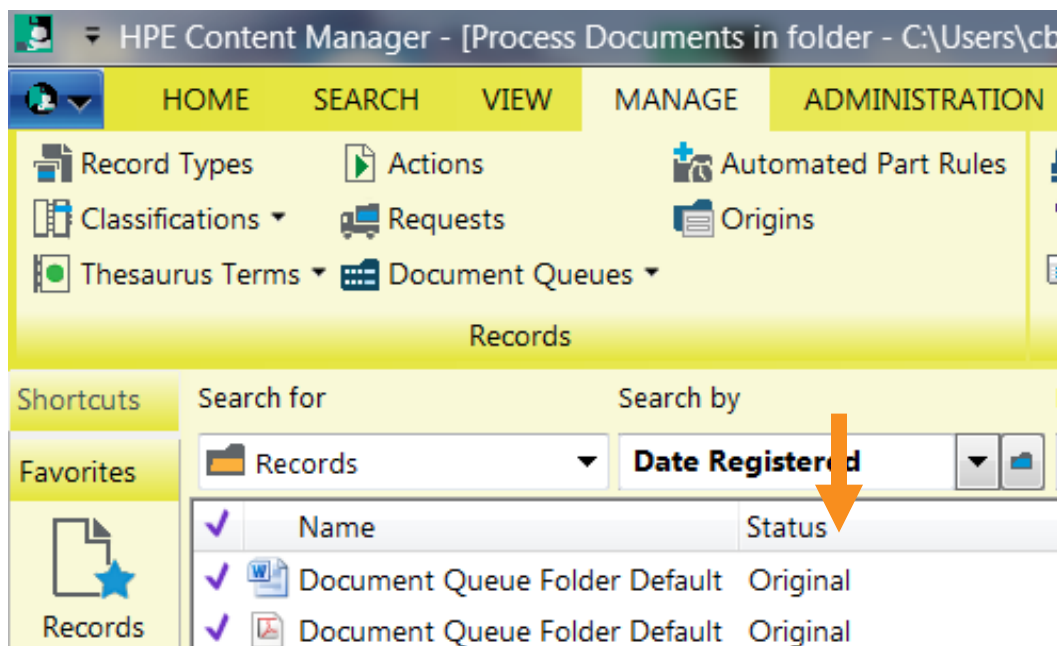


Then, to add the documents to the Digital Archives:

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



Once the records have been checked in, the status of the documents will change from "draft" to **ORIGINAL**.



(**Note:** the records from the user's computer/network queue folder will **NOT** be **DELETED** as they're being processed. The user will need to clear out the folder once the records have been added to the Digital Archives.)

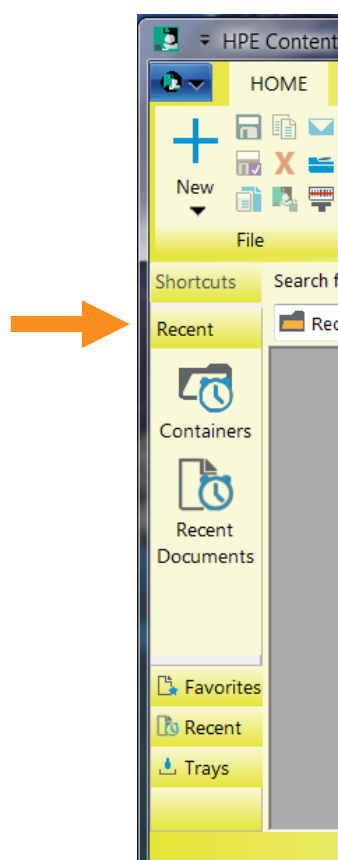
# Searching for Documents and Containers

(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.

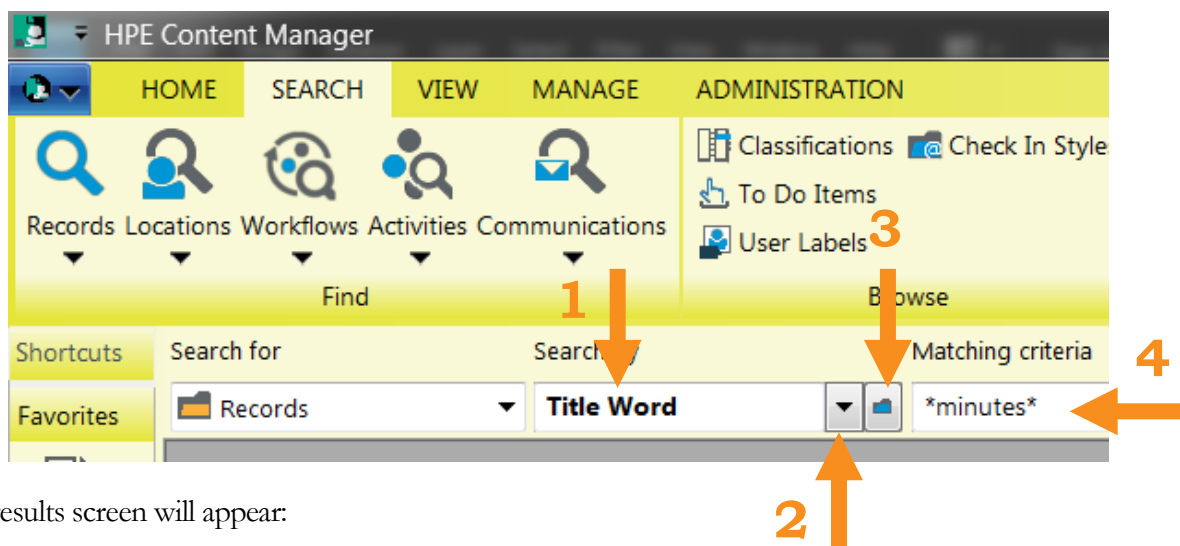
## RECENTLY ADDED RECORDS

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)

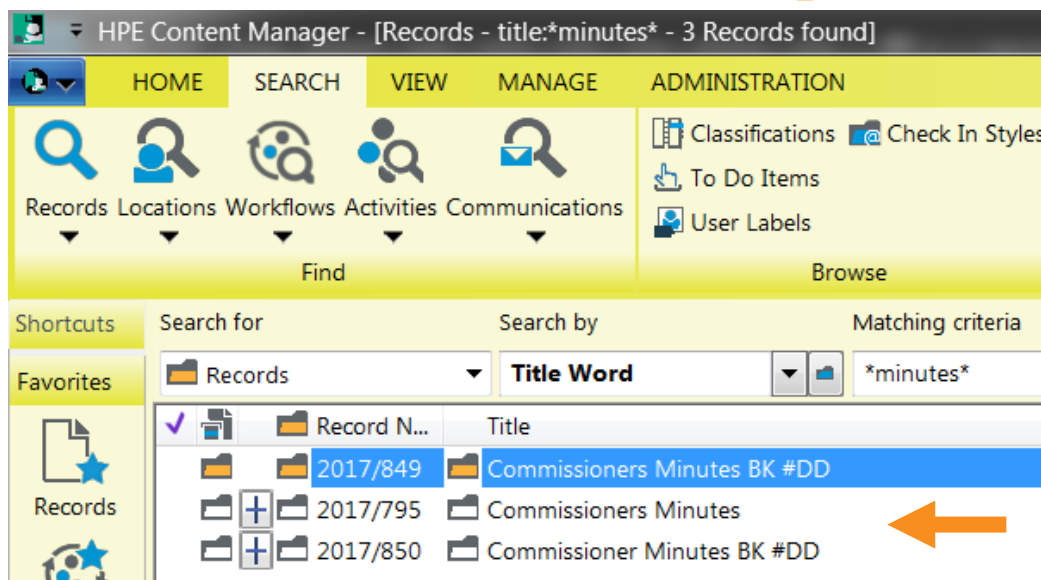


## SIMPLE SEARCHES (using just **ONE** criteria):


- 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:

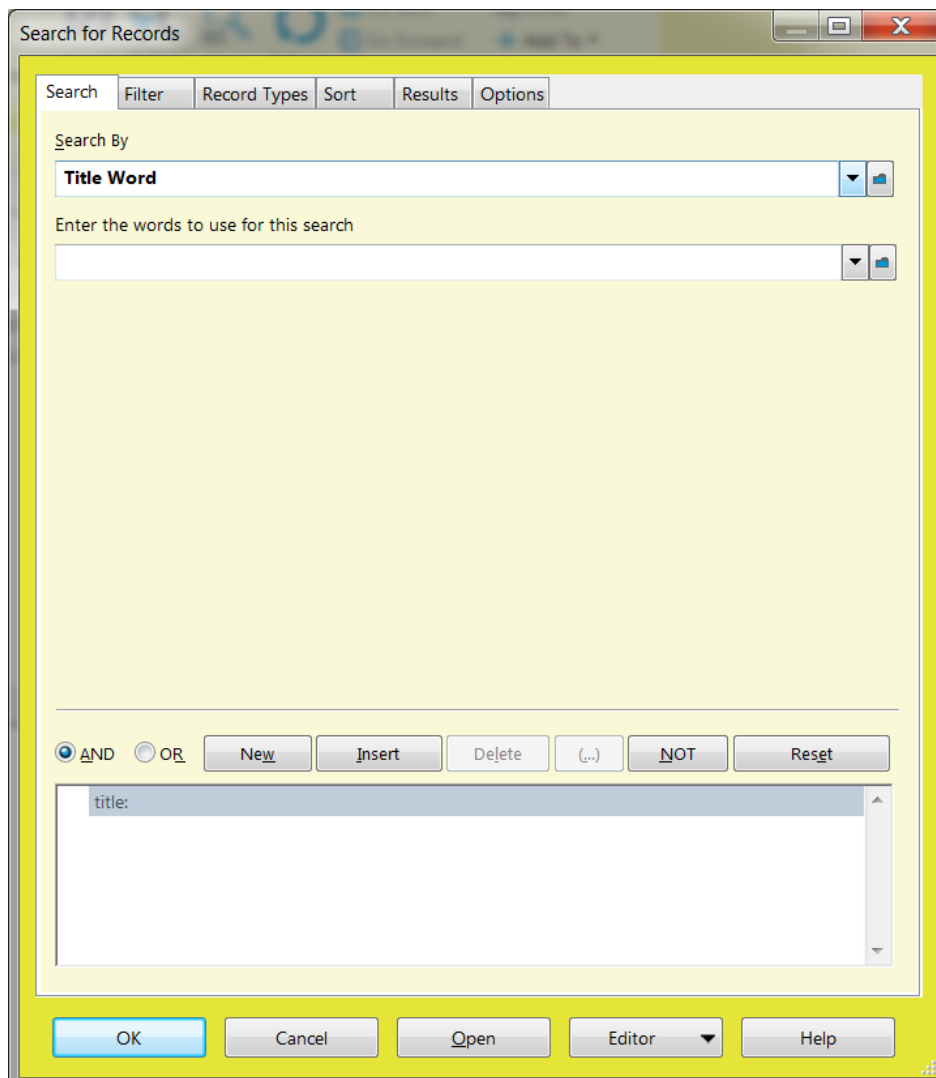


**ANOTHER** way to access the **SEARCH SCREEN** is to use one of the **FIND** icons:

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



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



The screenshot shows the 'Search for Records' dialog box. It has a title bar with standard window controls. The main area contains a search interface with the following elements:

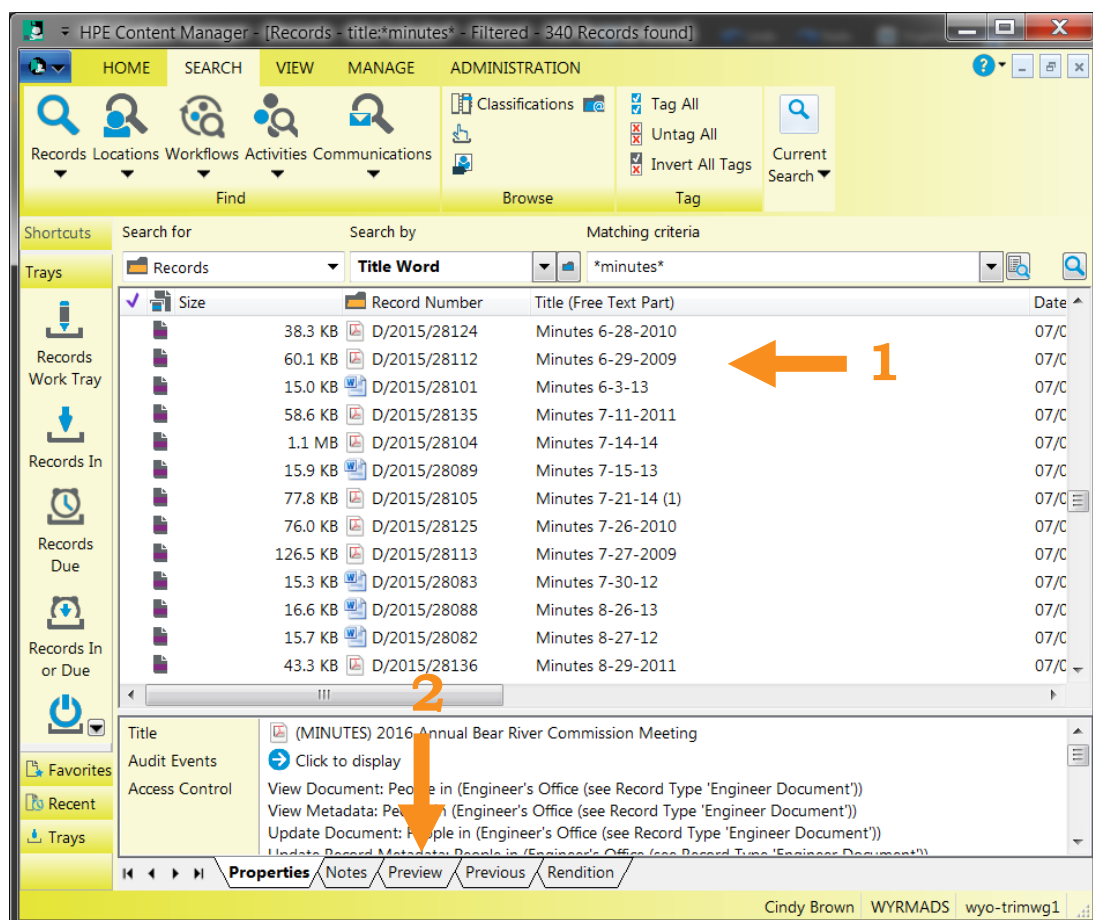
- Search By:** A dropdown menu set to 'Title Word'.
- Enter the words to use for this search:** A text input field.
- Search Logic:** Radio buttons for 'AND' (selected) and 'OR'.
- Buttons:** New, Insert, Delete, (...), NOT, and Reset.
- Search Query:** A text area containing 'title:'.
- Footer:** OK, Cancel, Open, Editor (dropdown), and Help buttons.

# 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 interface. The top navigation bar includes tabs for HOME, SEARCH, VIEW, MANAGE, and ADMINISTRATION. Below this, there are icons for Records, Locations, Workflows, Activities, and Communications, along with buttons for Classifications, Tag, and Current Search.

The main content area shows a search results table with columns for Size, Record Number, and Title (Free Text Part). The table lists several records, with the first two highlighted in blue:

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 preview of the selected document is shown. The preview includes a thumbnail of the document's first page, labeled 'Page 1', and a larger view of the document's content, labeled 'Page 2'. An orange arrow points from the thumbnail to the main preview area. The document content is titled 'STATE RECORDS COMMITTEE MEETING' and includes a list of committee members in attendance.

The bottom of the interface features a navigation bar with buttons for Properties, Notes, Preview, 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:

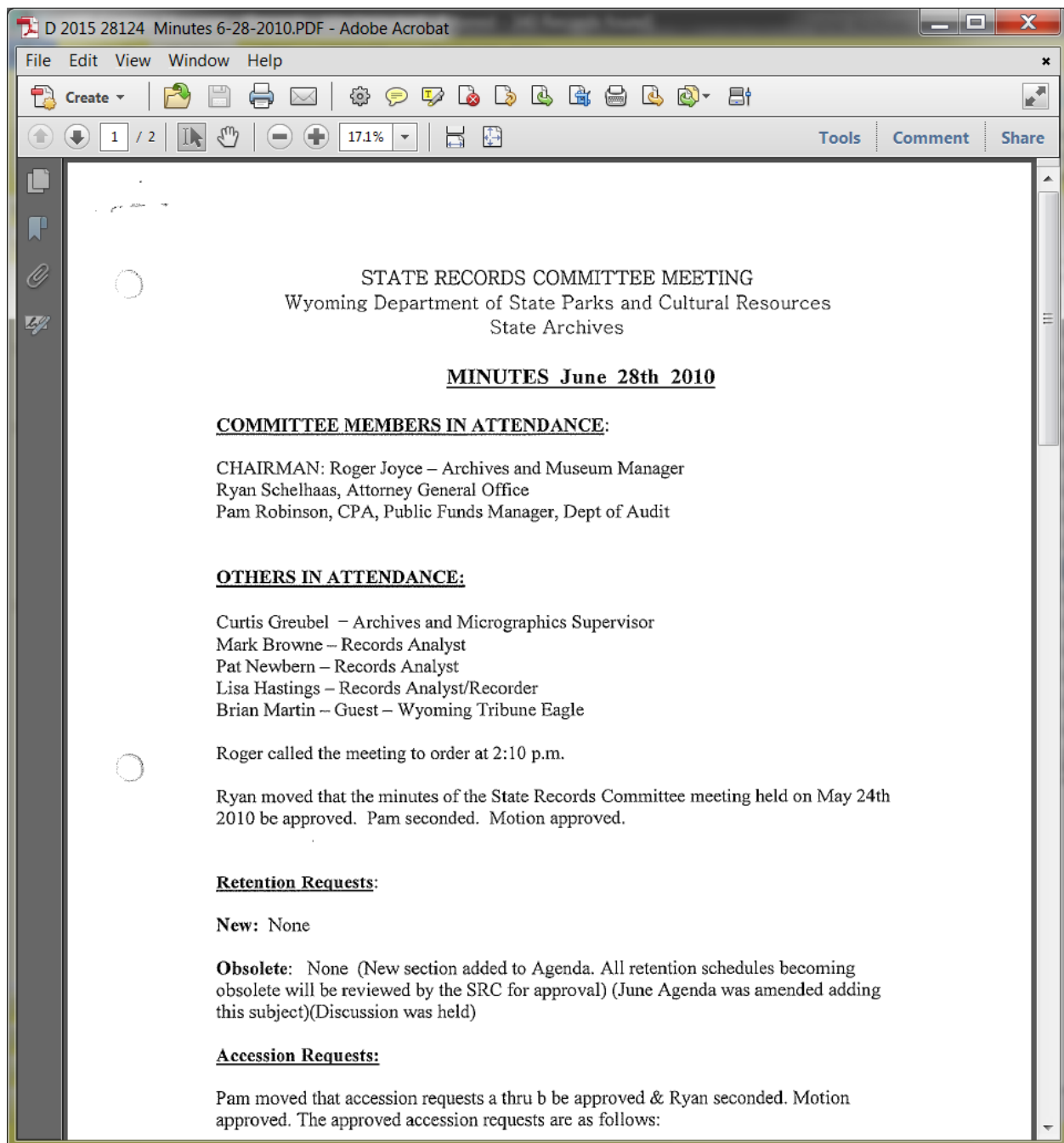
Double-Click on the **PERTINENT DOCUMENT**.

The screenshot shows the HPE Content Manager 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 area displays search results for the query '\*minutes\*'. The results are shown in a table with columns for Size, Record Number, and Title (Free Text Part). An orange arrow points to the record with Record Number 'D/2015/28111'. Below the table, there is a section for the selected record's details, including Record Number, Security, Classification, Container, and Retention schedule. The bottom of the interface shows a status bar with the user name 'Cindy Brown' and the system name 'WYRMADS'.

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

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

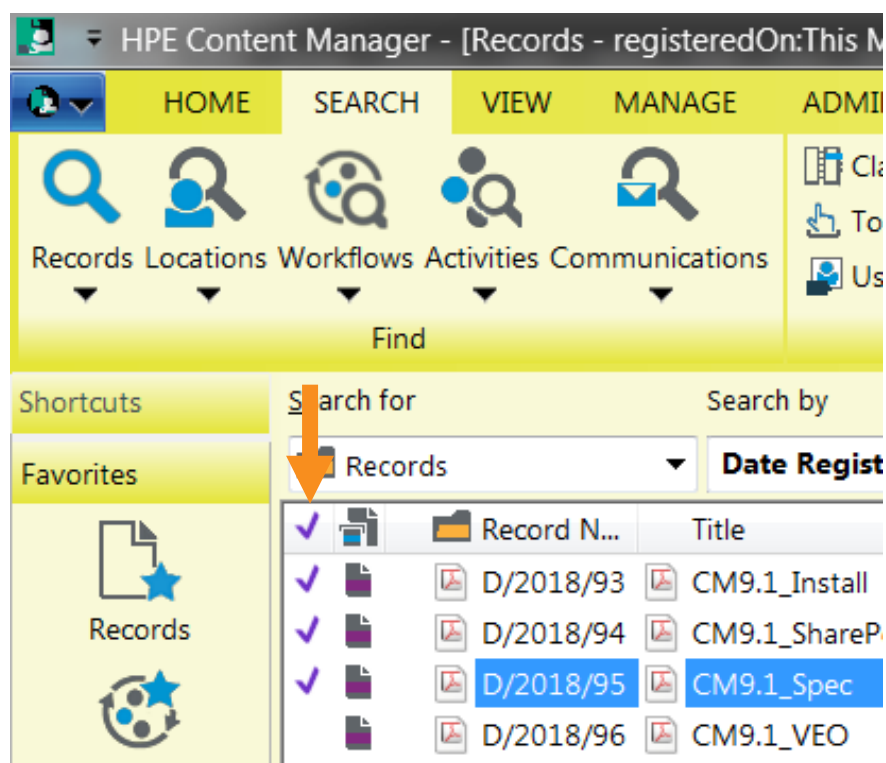
(See also training video linked to: <http://wyoarchives.state.wy.us/index.php/wyoming-digital-archives>.)

If the agency only needs a copy of **ONE** document, it can be **DRAGGED AND DROPPED** onto the user's computer desktop.

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

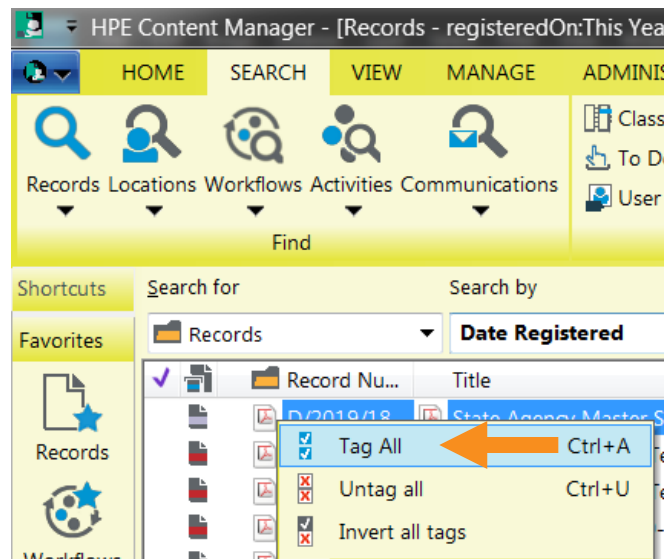
To **SUPERCOPY**:

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

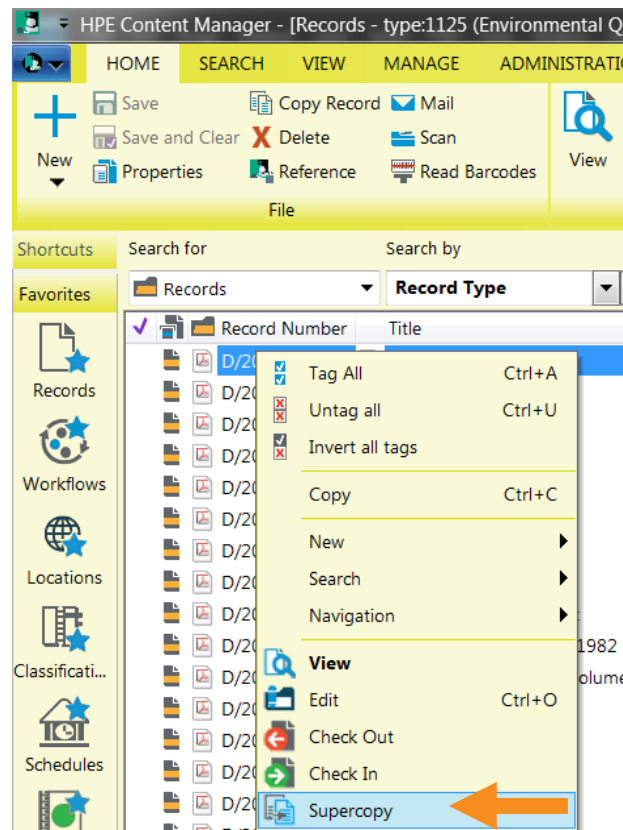


Or: to Select/Tag  **ALL** the **DOCUMENTS** on the screen:

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

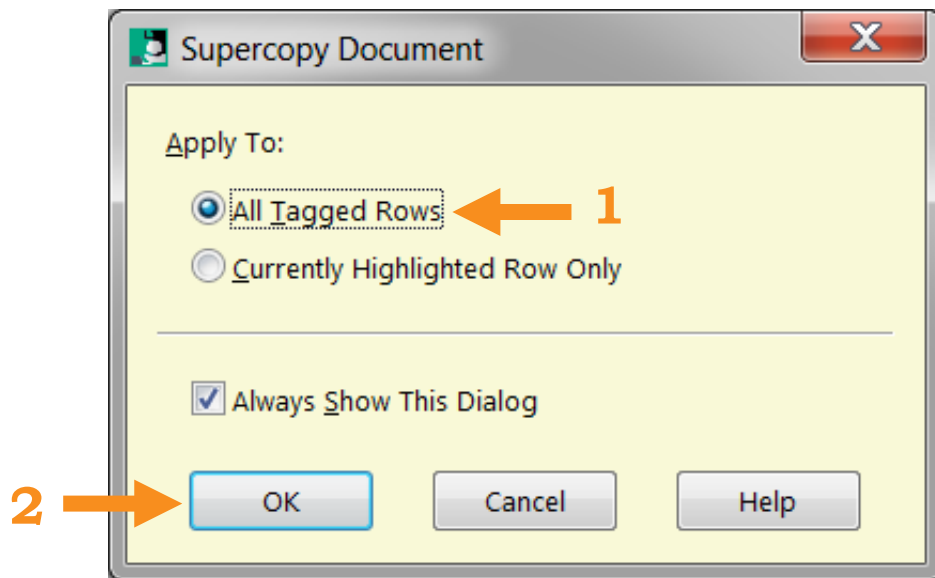


- Select **SUPERCOPY** (to copy the tagged documents).




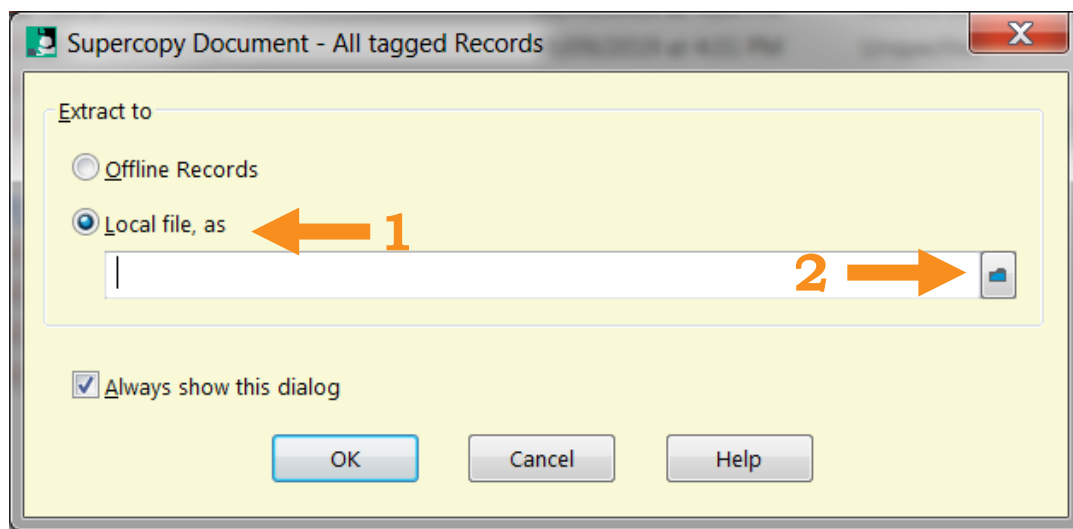
The **SUPERCOPY DOCUMENT** screen will appear.

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



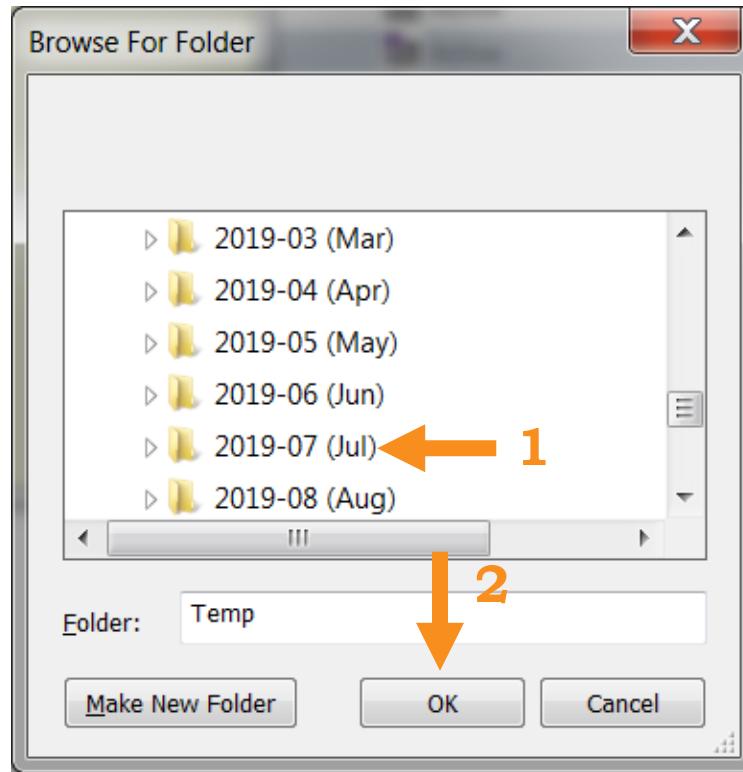
The **SUPERCOPY DOCUMENT - ALL TAGGED RECORDS** screen will appear. To **SAVE** a **COPY** of the documents to network folder:

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



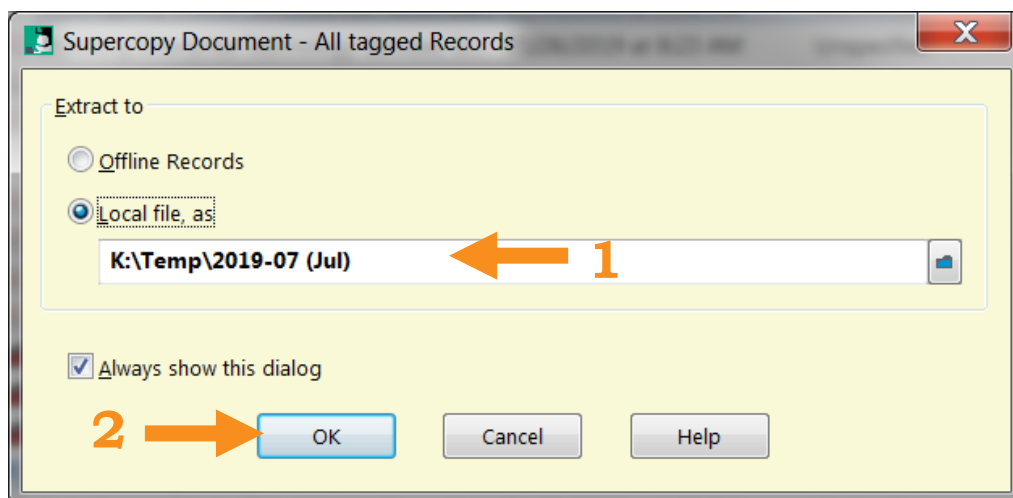
The **BROWSE FOR FOLDER** screen will appear

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



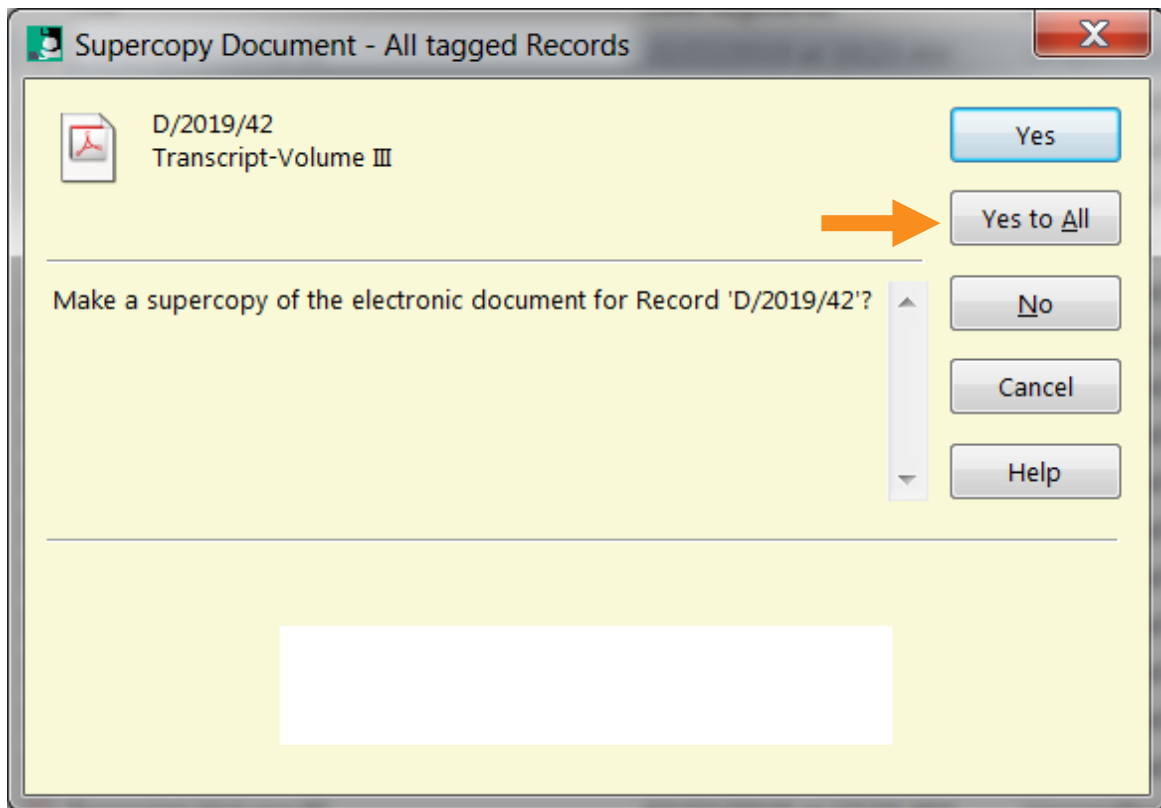
The **SUPERCOPY DOCUMENT - ALL TAGGED ROWS** screen will reappear:

- 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.




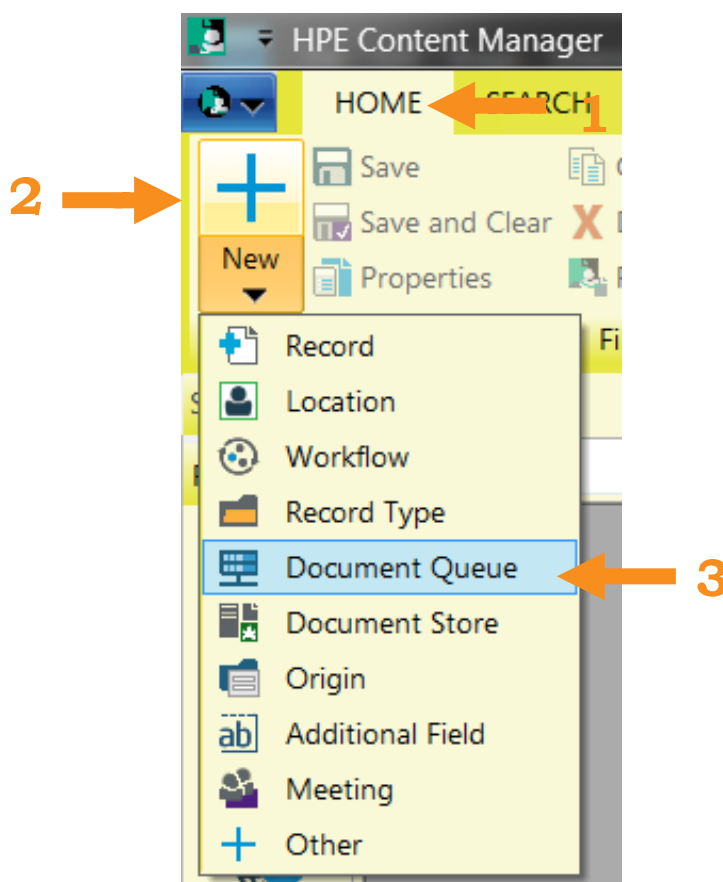
# APPENDICES: (ADVANCED USER INSTRUCTIONS)

- 5.1      [Adding Documents - Creating A Document Queue](#)
- 5.2      [Searching for Document/Containers - Complex](#)

# Adding Documents - Creating A Document Queue

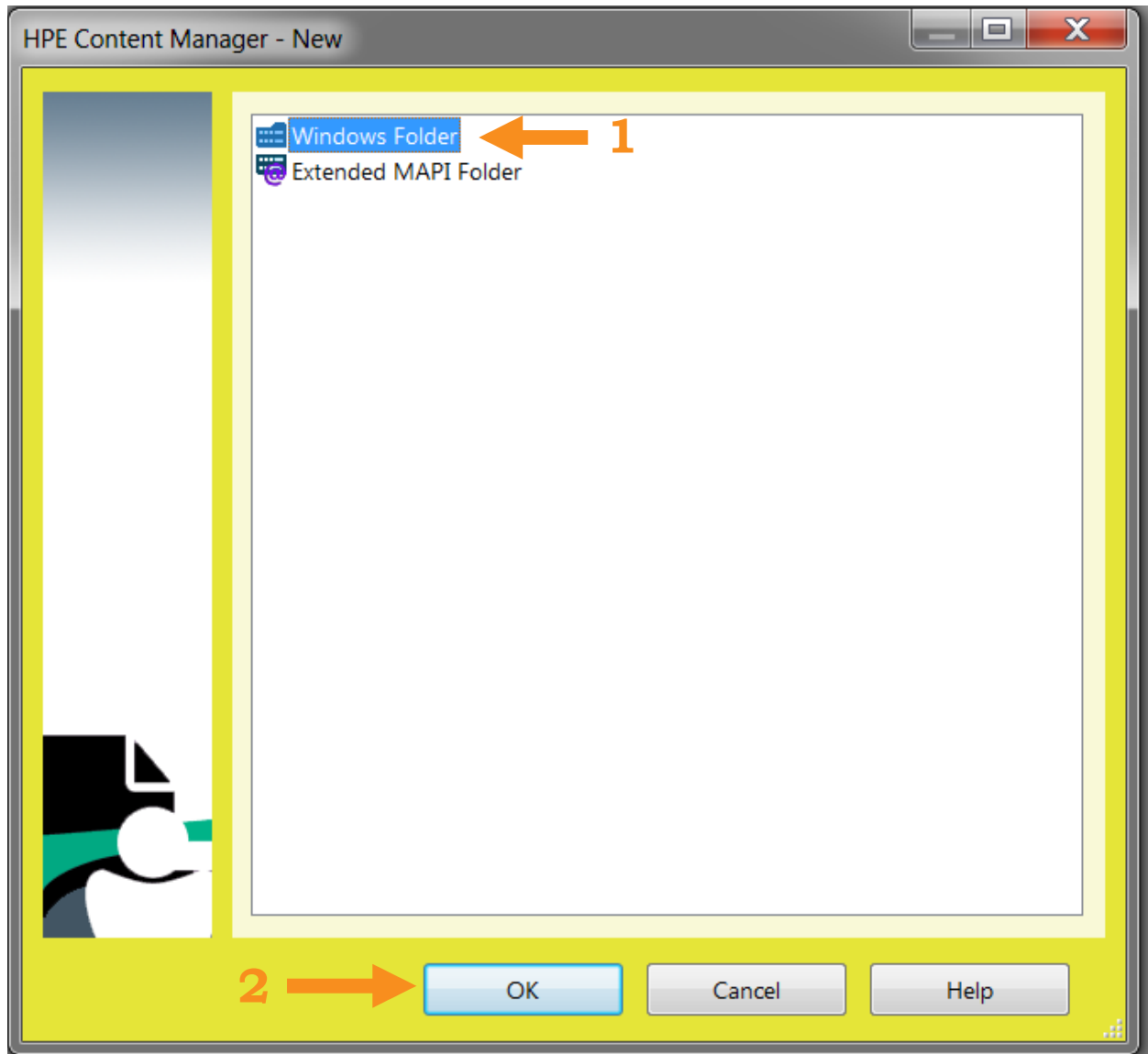
The State Archives staff can assist with setting up a Document Queue. If the user would rather create the document queue:

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




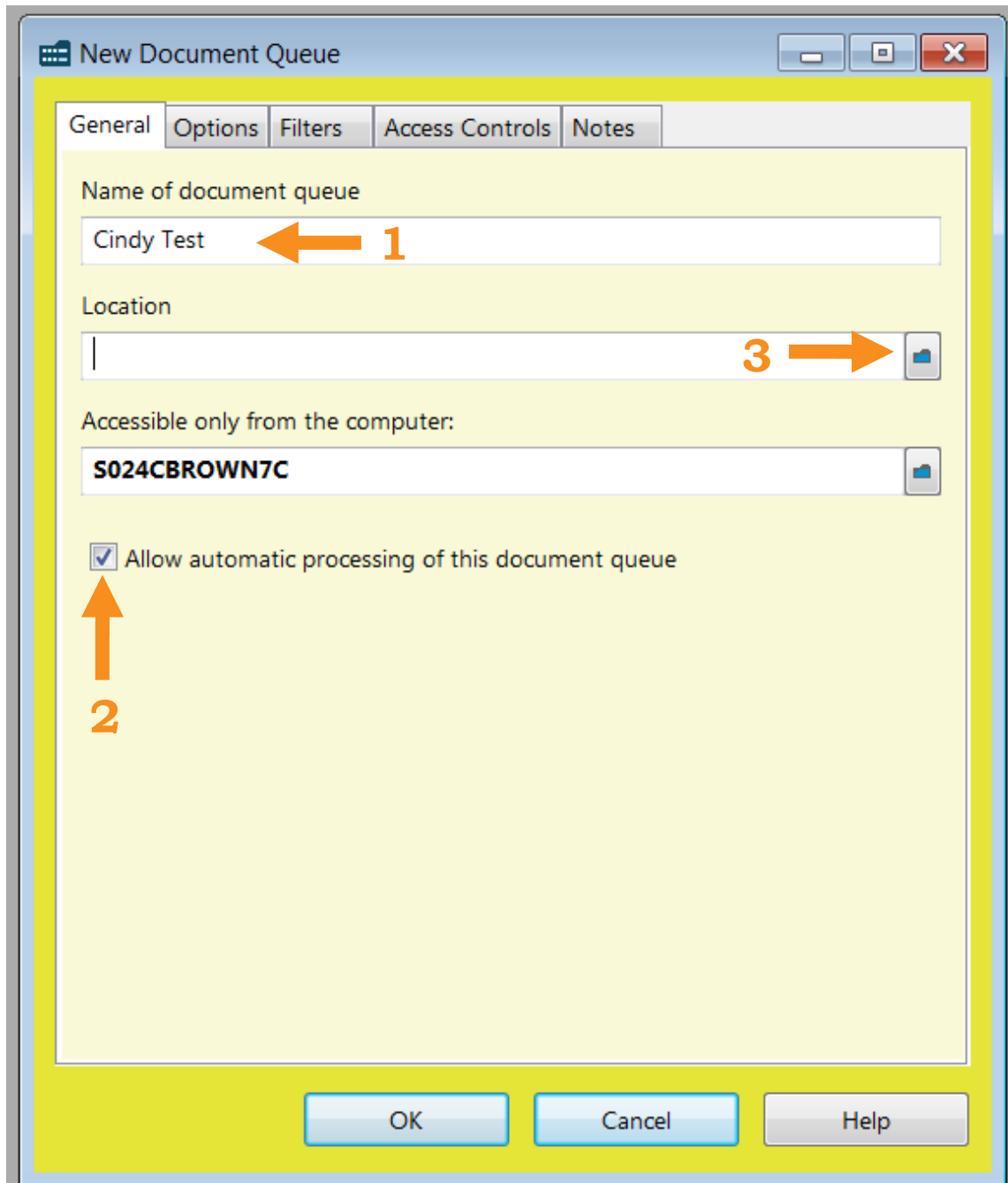
The **HPE CONTENT MANAGER - NEW** screen will appear:

- 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** .



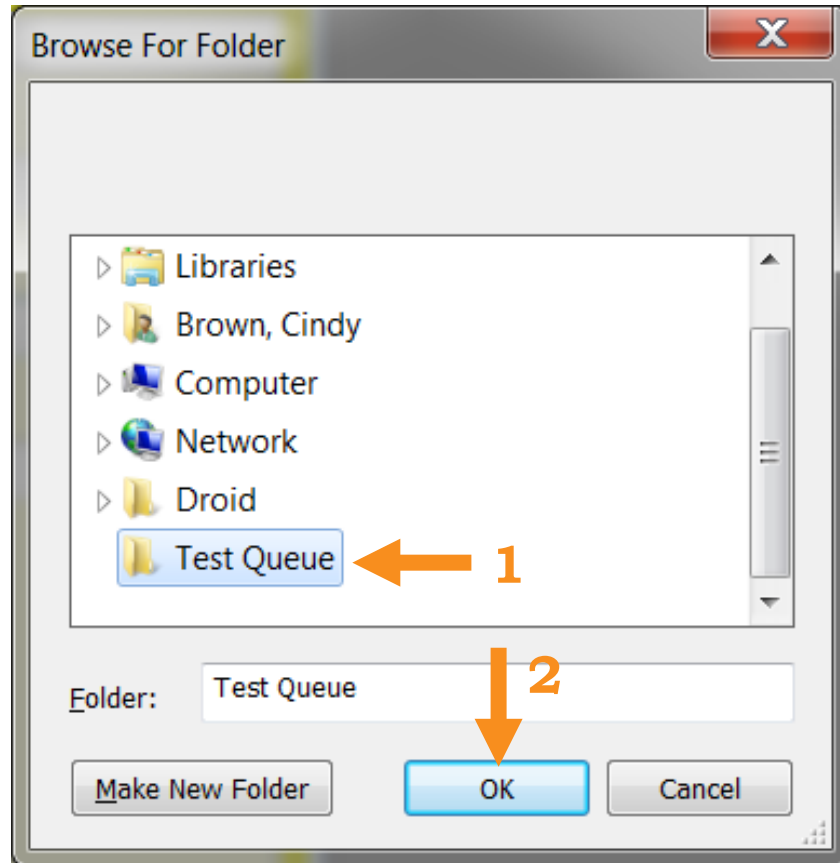
The screenshot shows the 'New Document Queue' dialog box with the following fields and annotations:

- Name of document queue:** A text box containing 'Cindy Test' with an orange arrow and the number '1' pointing to it.
- Location:** A text box with a blue folder icon to its right, with an orange arrow and the number '3' pointing to the icon.
- Accessible only from the computer:** A text box containing 'S024CBROWN7C' with a blue folder icon to its right.
- Allow automatic processing of this document queue:** A checkbox that is checked, with an orange arrow and the number '2' pointing to it.


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

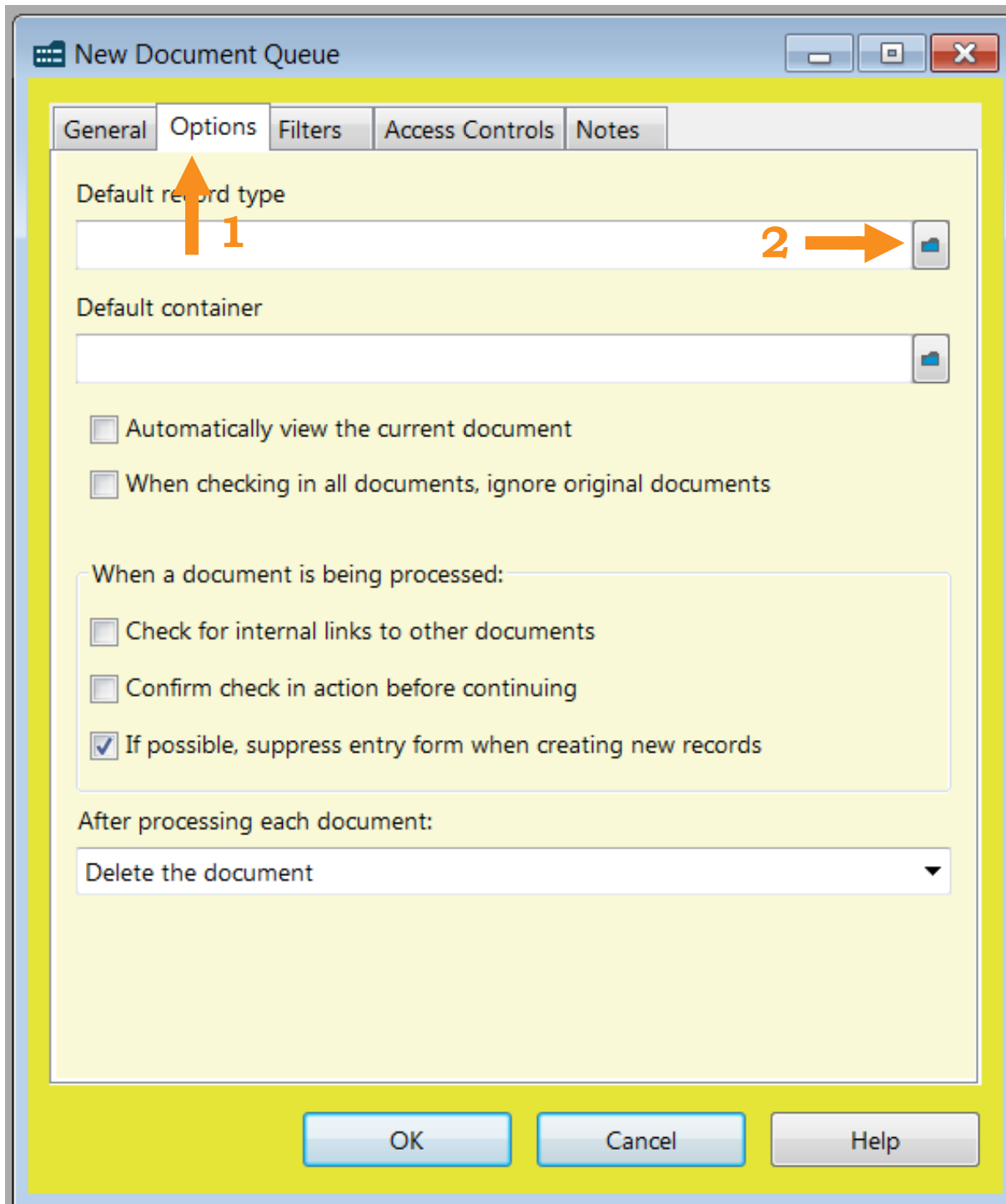
The **BROWSE FOR FOLDER** screen will appear:

- 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 title bar with standard window controls. Below the title bar are five tabs: 'General', 'Options', 'Filters', 'Access Controls', and 'Notes'. The 'Options' tab is active, showing several settings. 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'. At the very bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

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

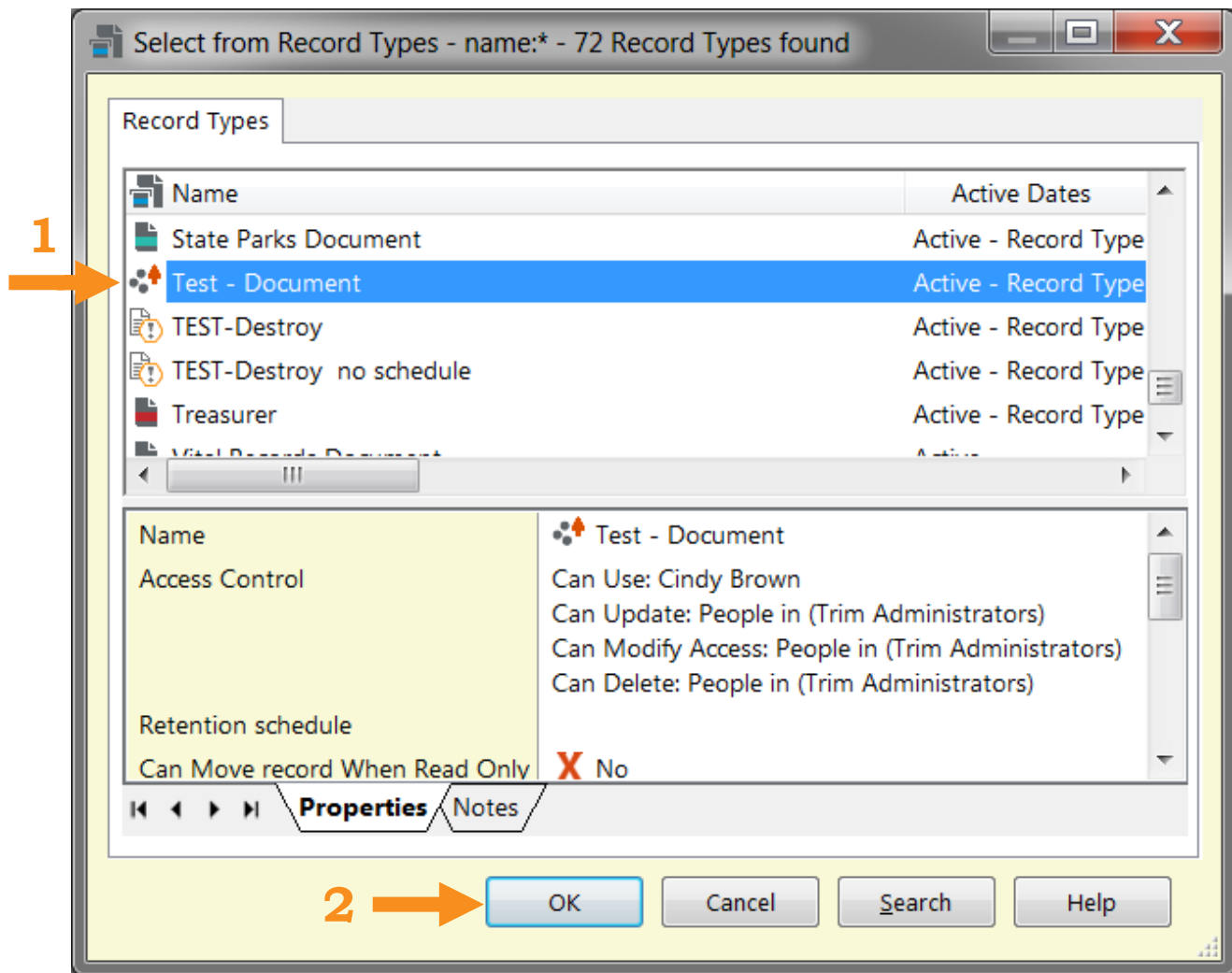
After processing each document:

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**

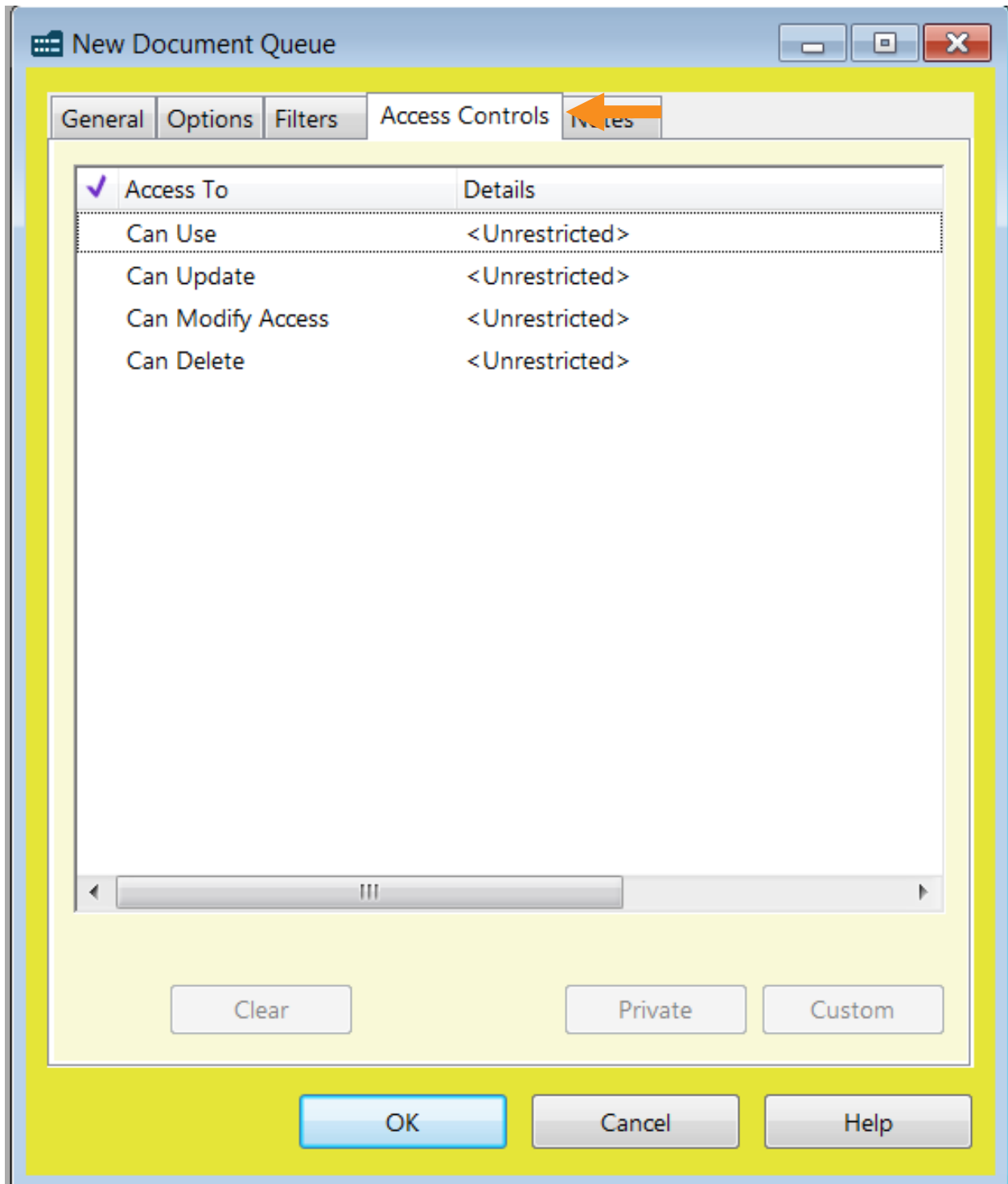
After processing each document:

Delete the document **2**

OK Cancel Help

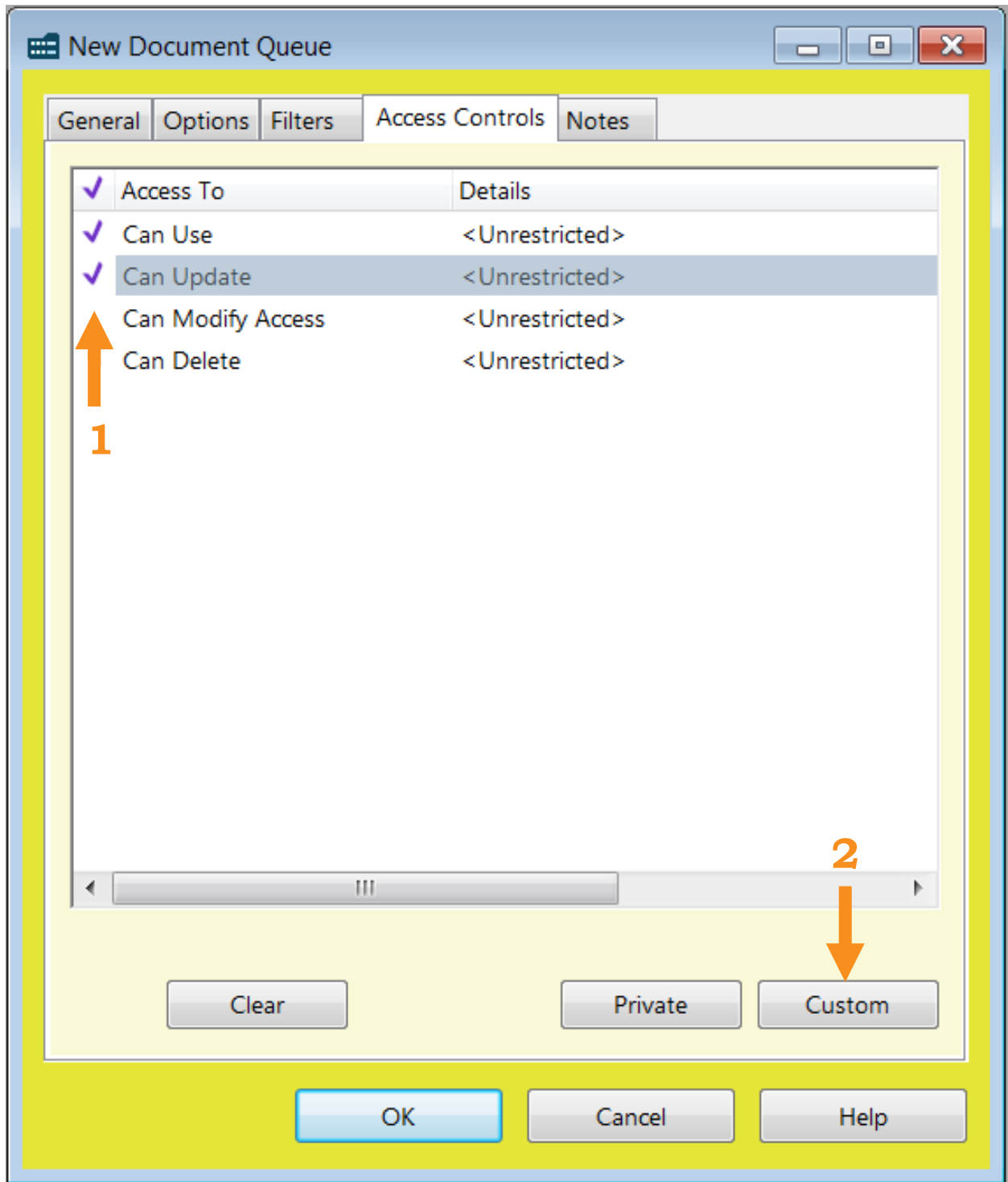


The **ACCESS CONTROL** tab, allows the user to designate who can use and update the queue:



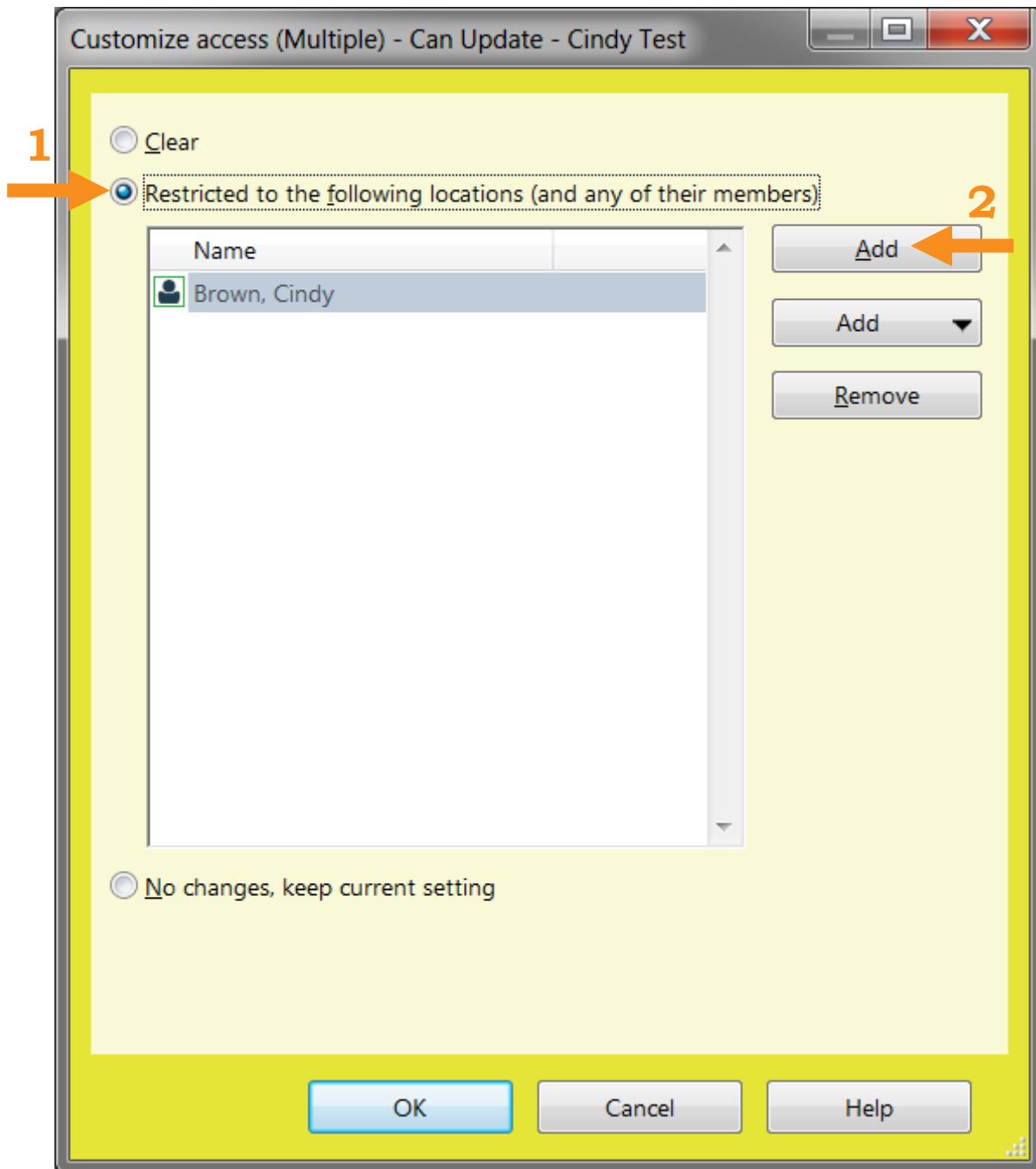
To change the **ACCESS CONTROLS** security settings:

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



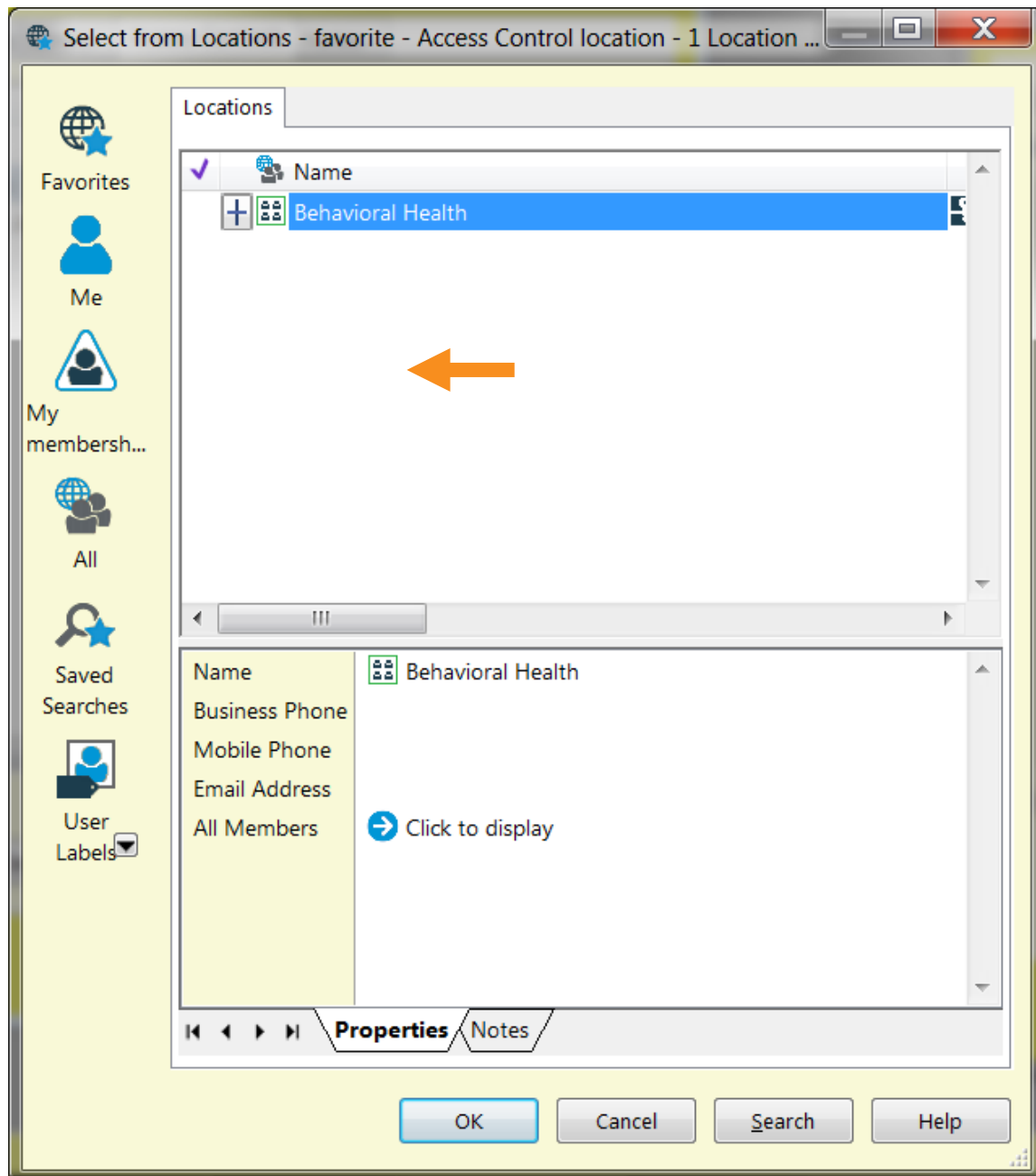
The **CUSTOMIZE ACCESS (MULTIPLE) - CAN UPDATE** screen will appear:

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



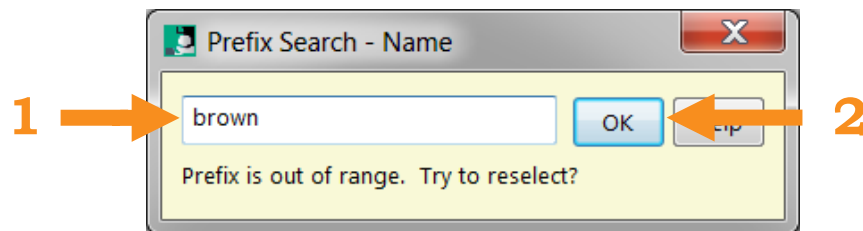
The **SELECT FROM LOCATIONS - FAVORITE - ACCESS CONTROL LOCATION** screen will appear:

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



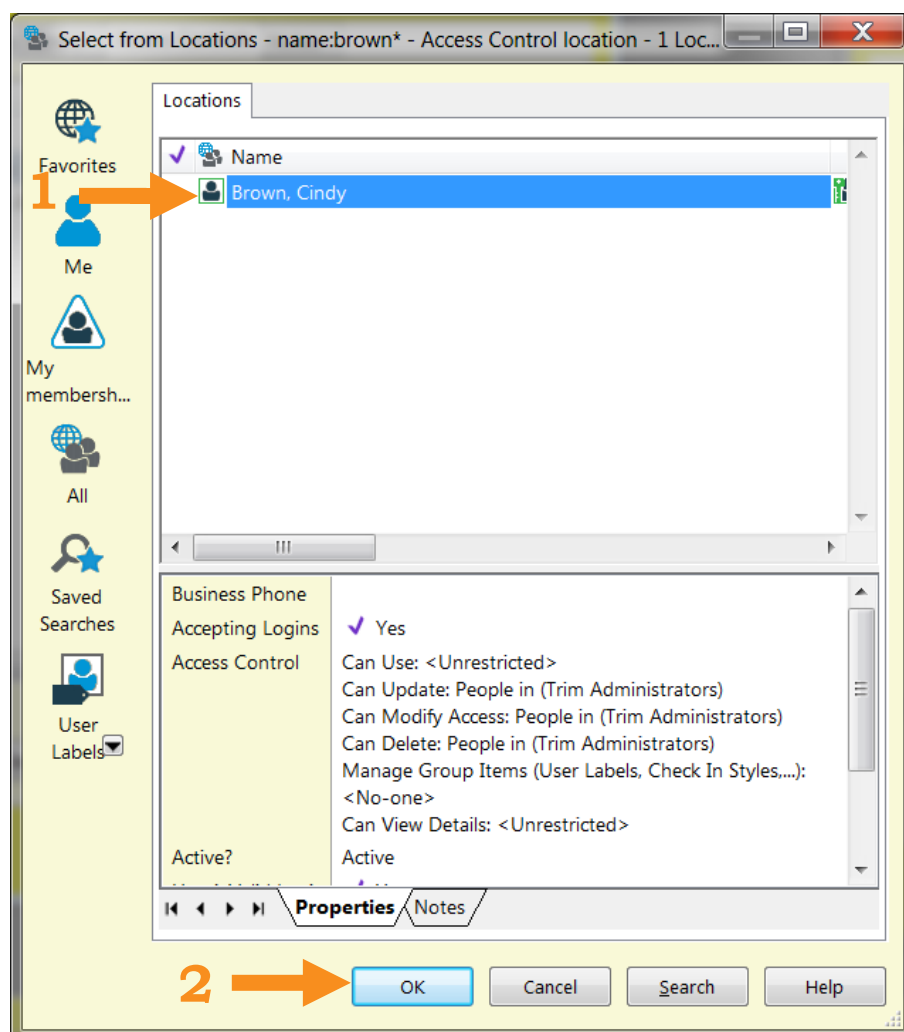
The **PREFIX SEARCH - NAME** screen will appear:

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



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

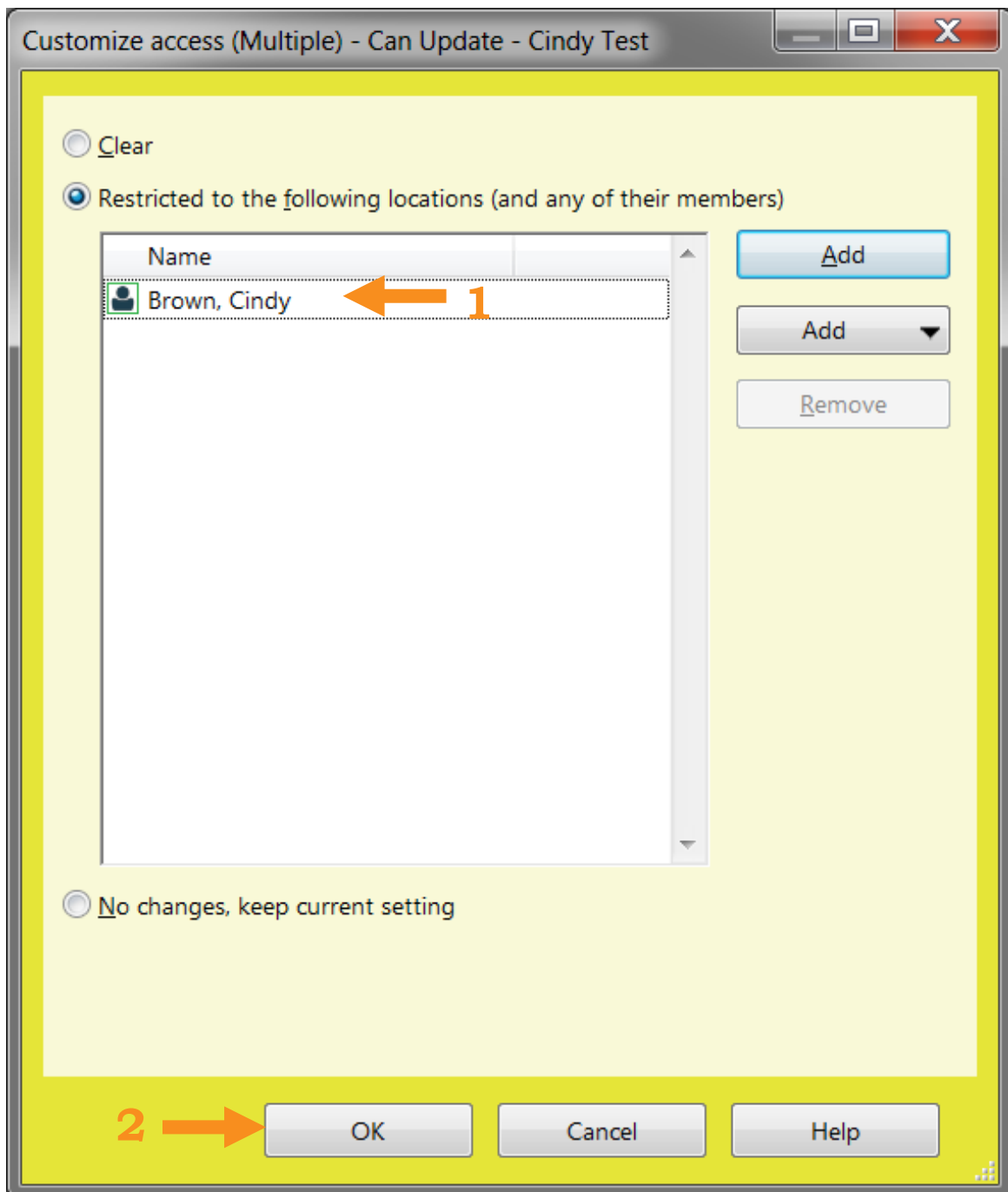
- Highlight the **PERTINENT NAME/NAMES FROM THE LIST**.
- Click **OK**.



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

If the name/names look correct:

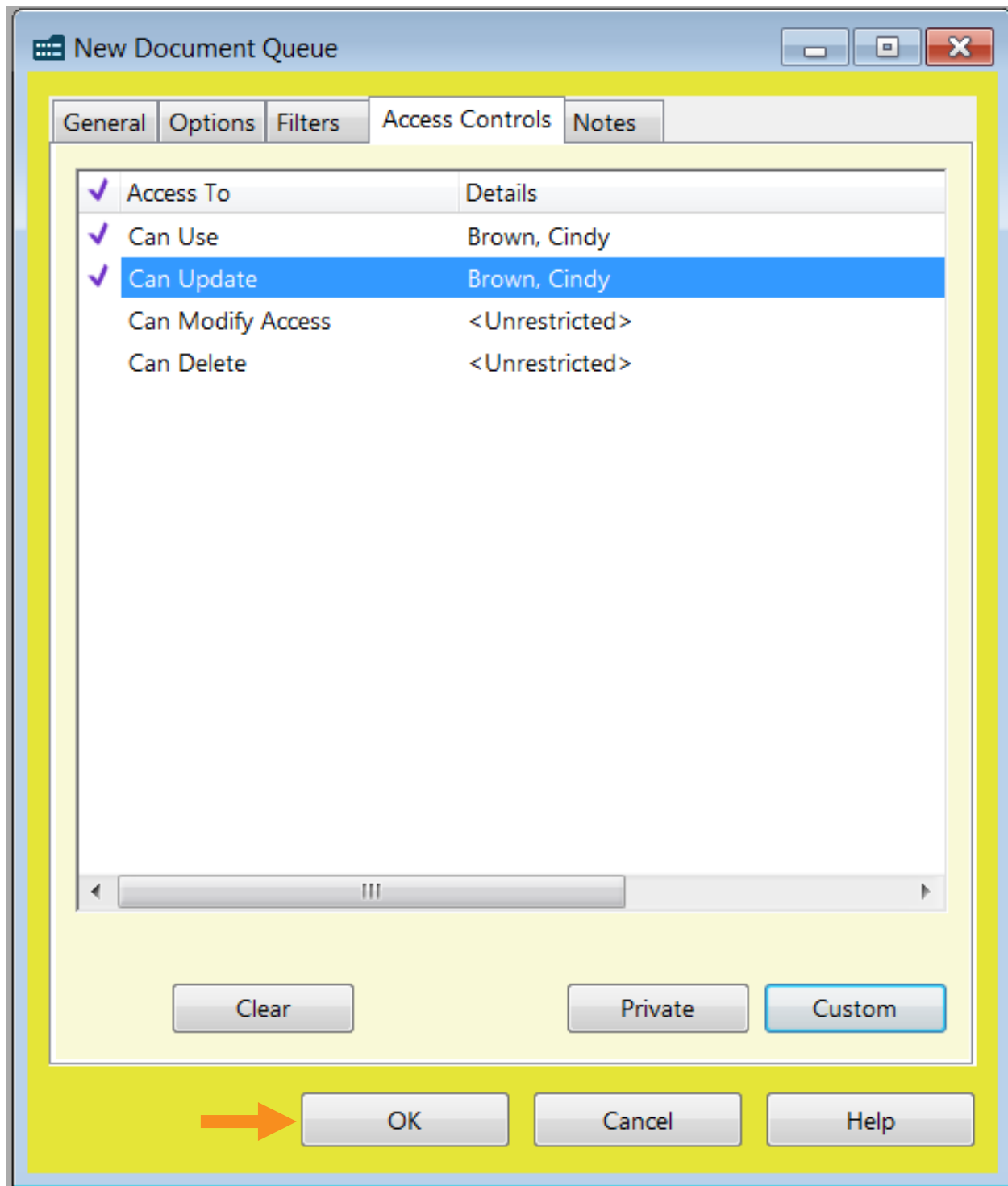
- Click **OK**.



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

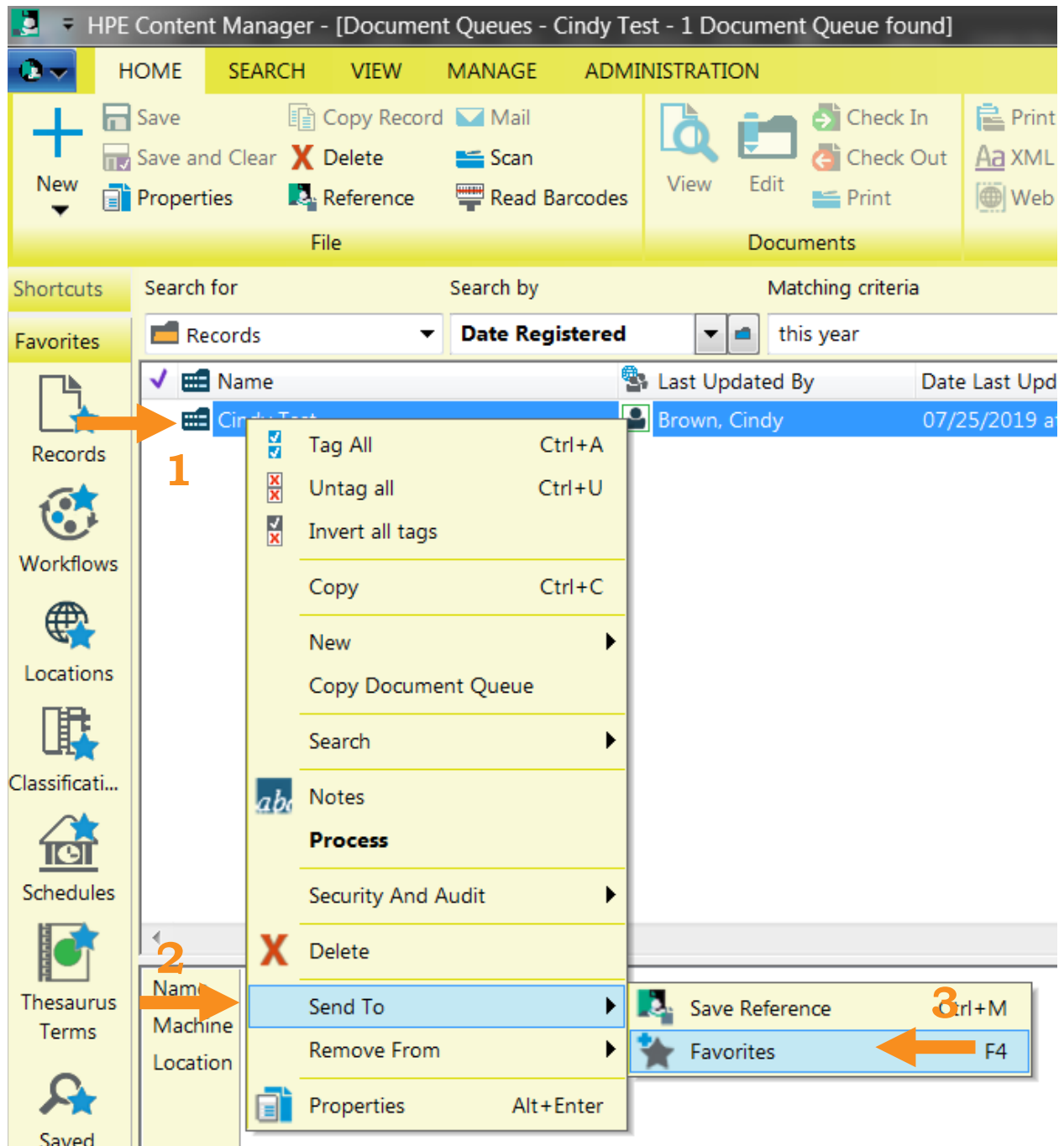
To complete the creation of the Document Queue:

- 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**.





# Searching for Documents and Containers - Complex

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

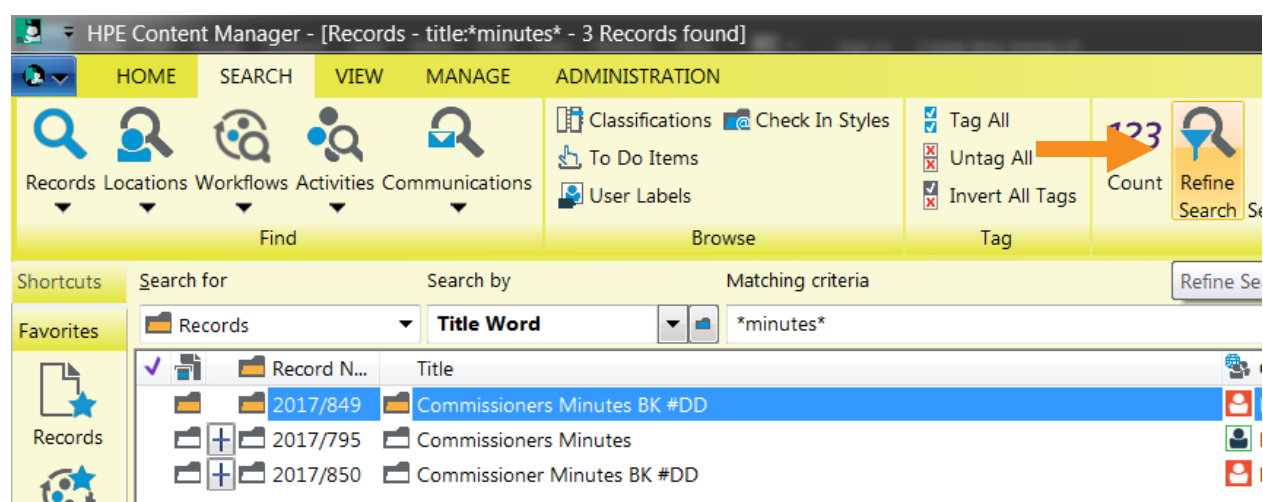
The Digital Archives has powerful search capabilities, ranging from simple one term searches up to complex multi-tiered searches which can be saved for future use.

## COMPLEX/FILTERED SEARCHES

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

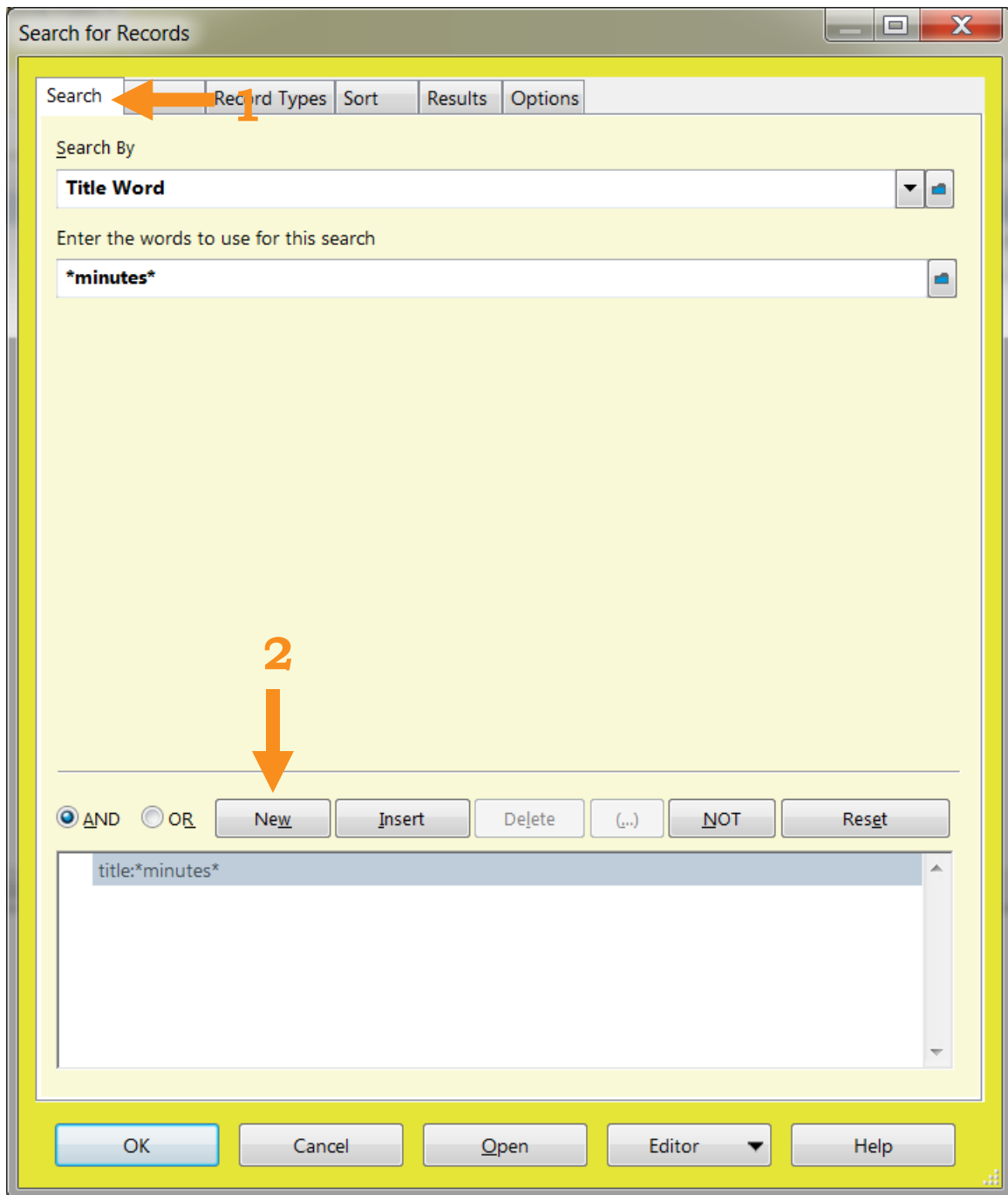
After searching for a record, ([see instructions above](#)):



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

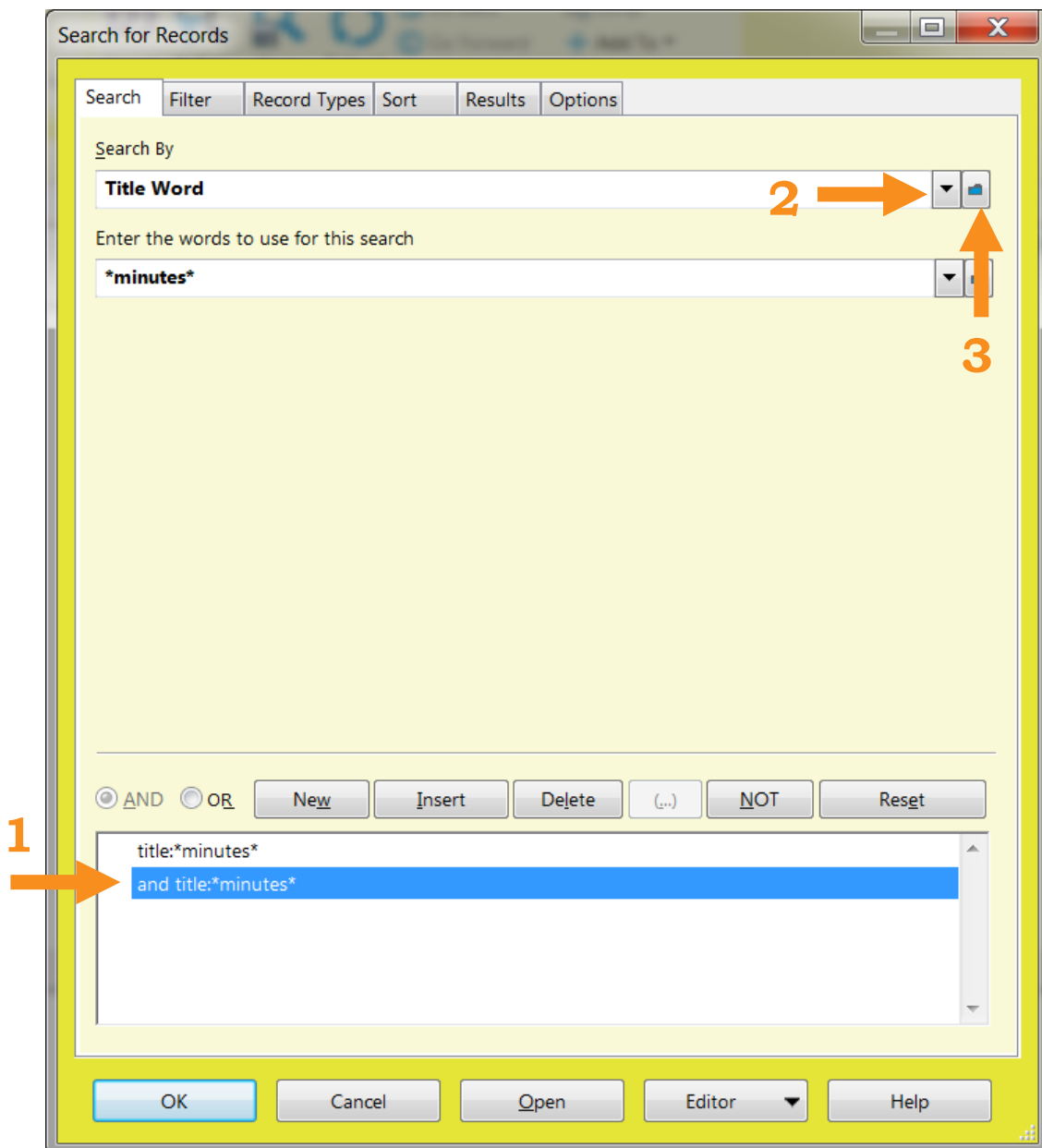


The **SEARCH FOR RECORDS** screen will appear. To **EDIT** or **REFINE** the search results:

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

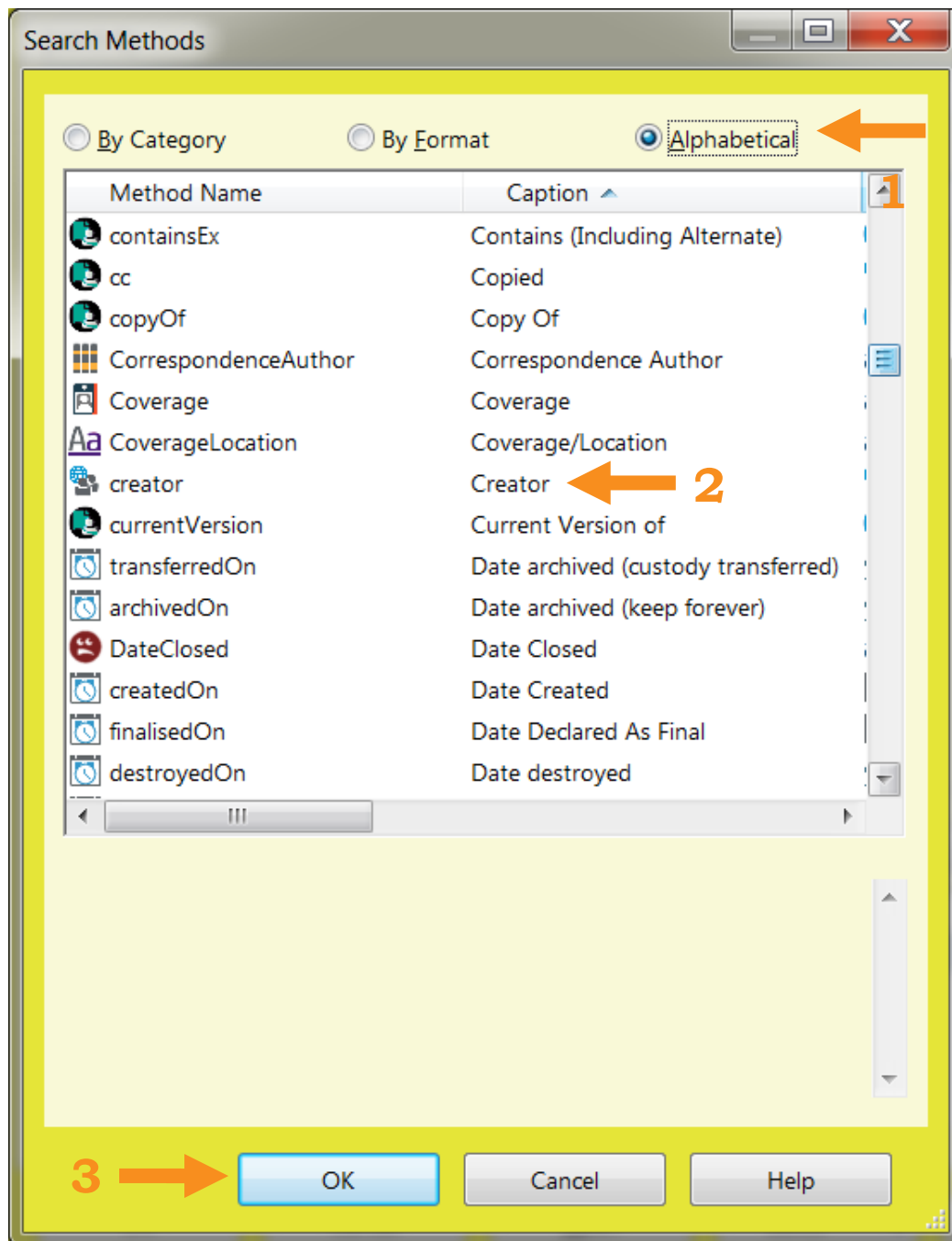


- Click the **BOTTOM** search criteria.
- Select a **SEARCH BY** choice/Click the **DOWN ARROW** .
- For even more **SEARCH BY** alternatives, click the **BLUE FOLDER** icon -which will provide a list of all search options-including any special data entry fields that may have been set up for the agency's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



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**.

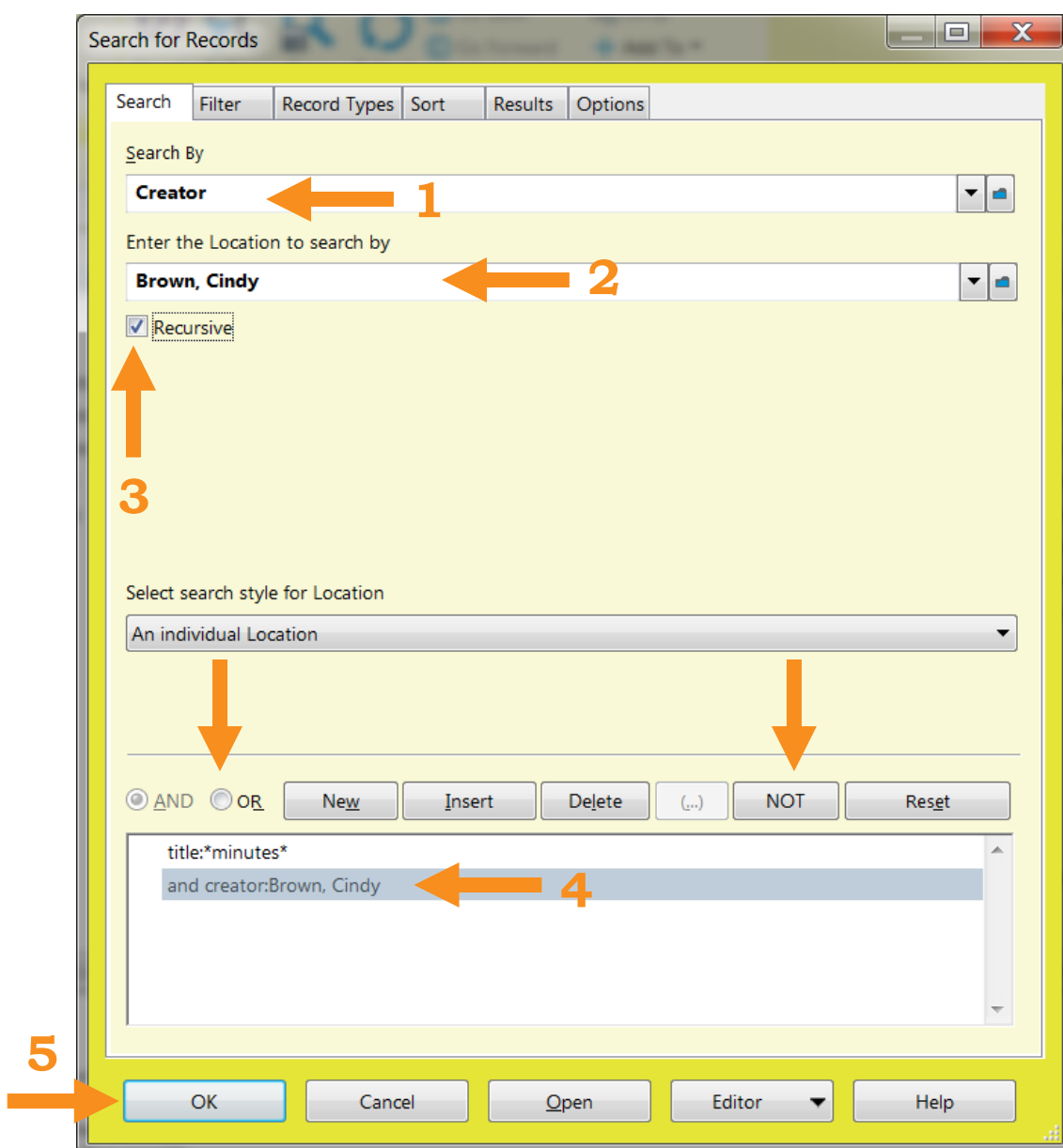


The **SEARCH FOR RECORDS** screen will reappear. In this example:

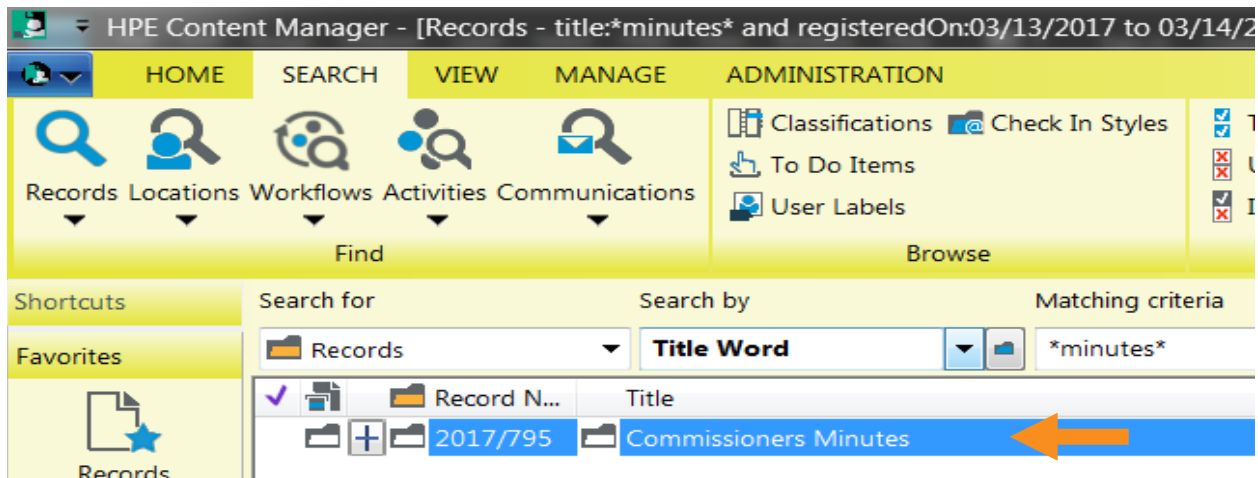
- A new **CREATOR** search has been added for the name “**Brown, Cindy.**” to the **TITLE** search for **\*minutes\***.

(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**.

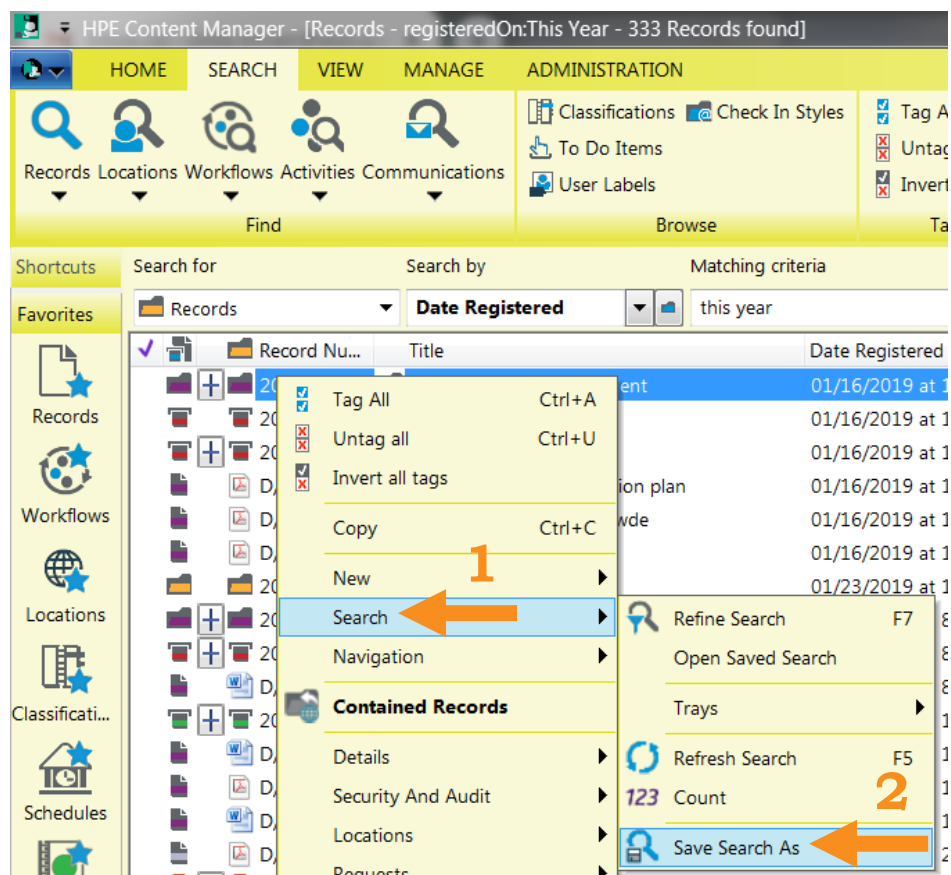


This will bring up the filtered (refined) results:



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:

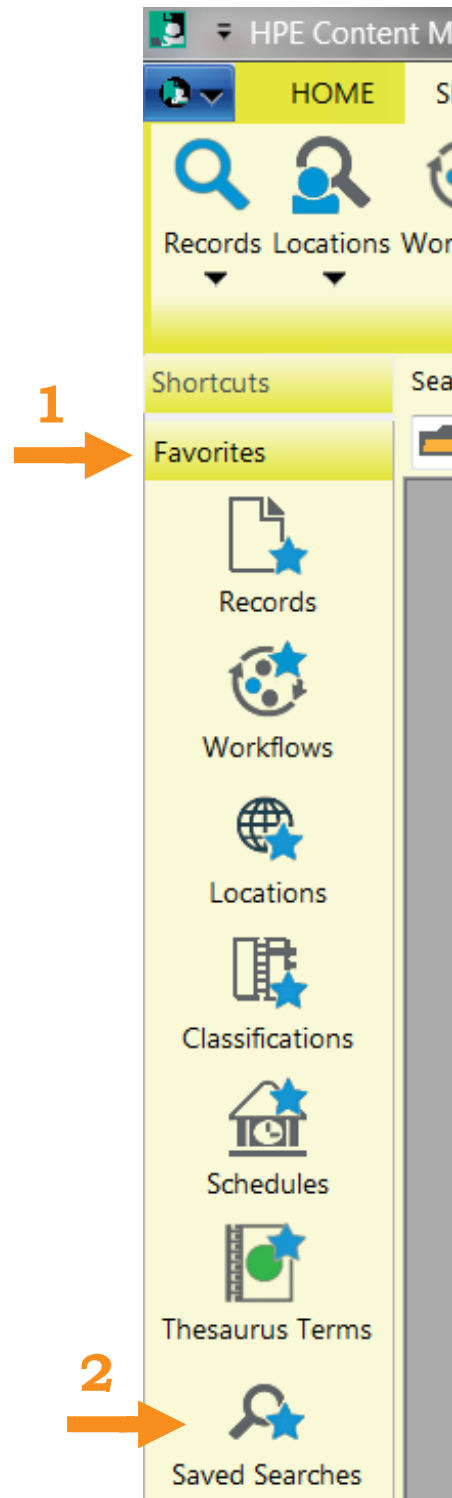
- Type in a **NAME** for the new saved search.
- Select/Toggle **ADD TO FAVORITES**.
- Click **OK**.

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**:

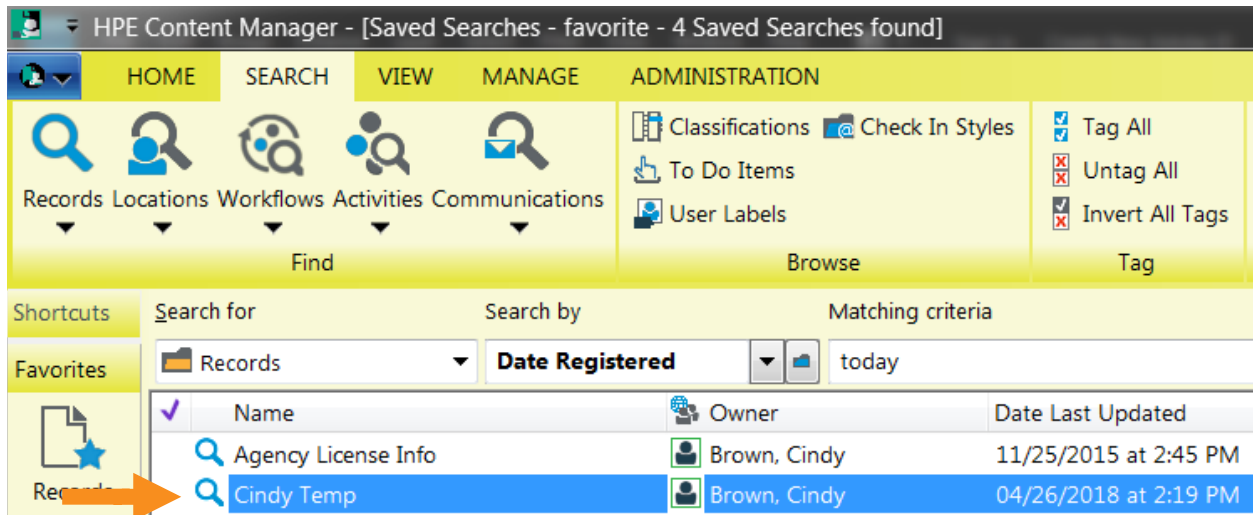
- Under the **FAVORITES** bar.
- Click on the **SAVED SEARCH** icon.



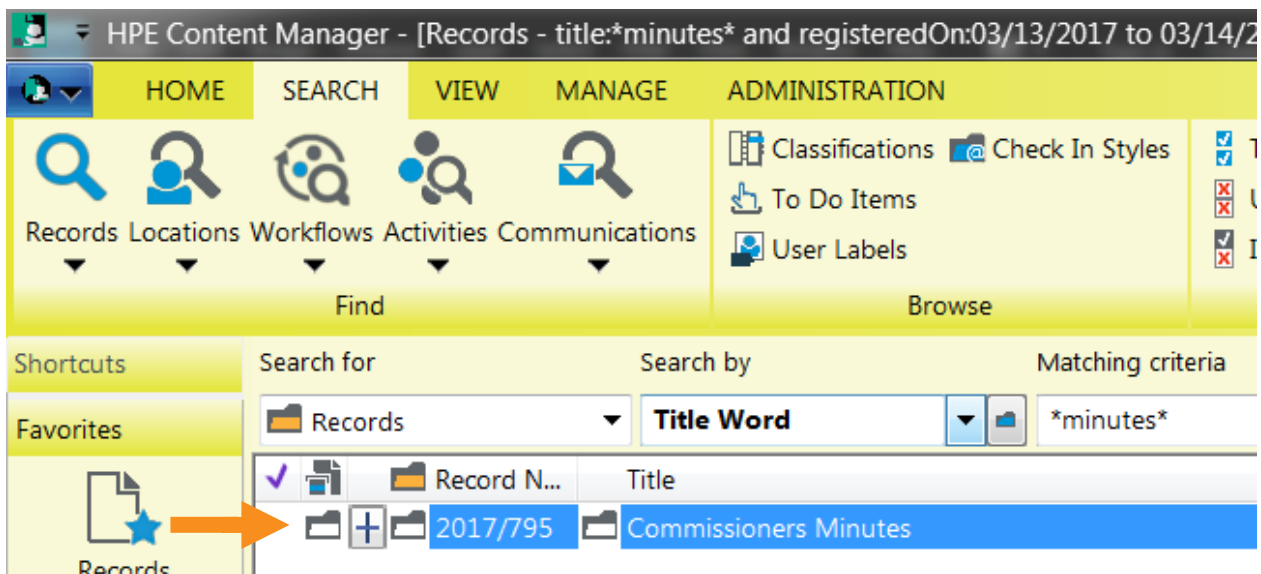


The **FAVORITE SAVED SEARCHES LIST** will appear.

- 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.