

Saving and Retrieving Electronic Documents (PC)

This sheet provides tips on how to save electronic documents and how to search for them.

Saving Electronic Documents

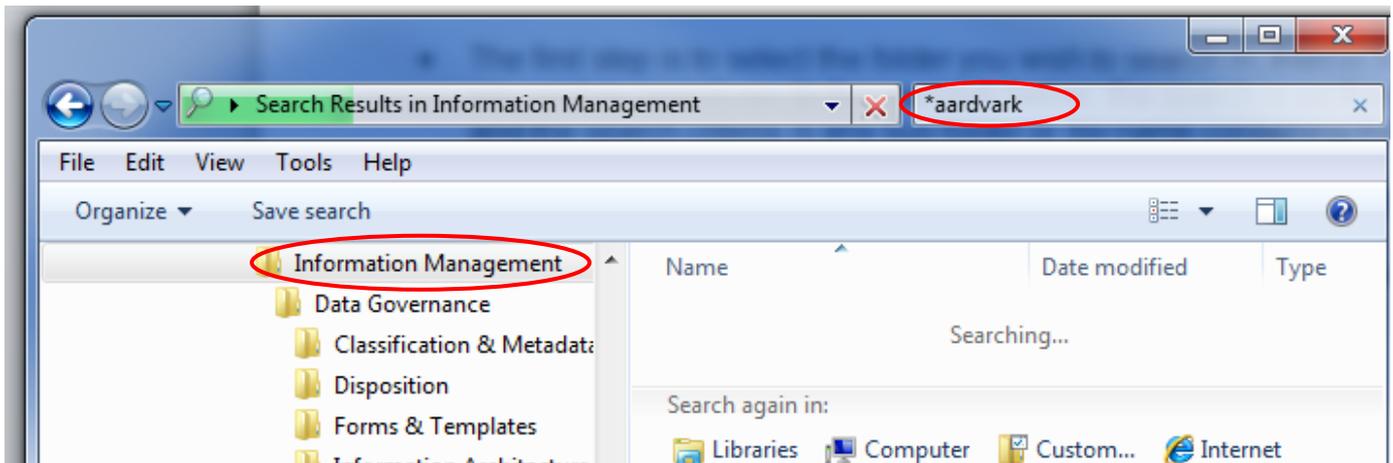
- Save University documents on shared network drives (e.g. J drive) or in other approved University recordkeeping and information management systems (e.g. Finance 1, Student 1, iPerform etc). They should **not** be stored on your computer's C drive (e.g. on the Desktop or My Documents) as these are not secure, nor are they backed up. For the same reasons, thumb drives and external hard drives are not appropriate places to store university records. However, **encrypted** thumb drives can be used in some instances, but there are still risks in losing the information on the thumb drive if the thumb drive itself is lost and the information wasn't saved anywhere else. The I Drive should only be used for personal documents, not records relating to Curtin business.
- Save University business emails to shared email mailboxes. Shared email mailboxes can be set up for your work team by CITS. Emails can also be saved to a shared network drive if you do not have access to a shared email mailbox. (Save as outlook .msg files in the case of saving on shared drives or simply click and drag them to the appropriate folder on the J Drive).
- Save highly sensitive or confidential documents into locked down folders on your network drive or shared email mailbox. In locking down a folder, you determine who can see the folder and the documents contained within it.
- Follow Curtin's [Document Naming Guidelines](#) when creating electronic documents.
- File electronic documents into subject or topic based folders. Create a folder structure that corresponds with your business processes.
- Make sure your folder names are short and to the point. The folder information is actually part of the document name. The further down the folder structure a document is, the longer its full name will be. **Long file names can lead to problems opening, saving, copying, backing up or restoring your document.**
- Include the document file path in the document footer so that it can be found more easily.

Retrieving Electronic Documents – PC Users (Windows 7)

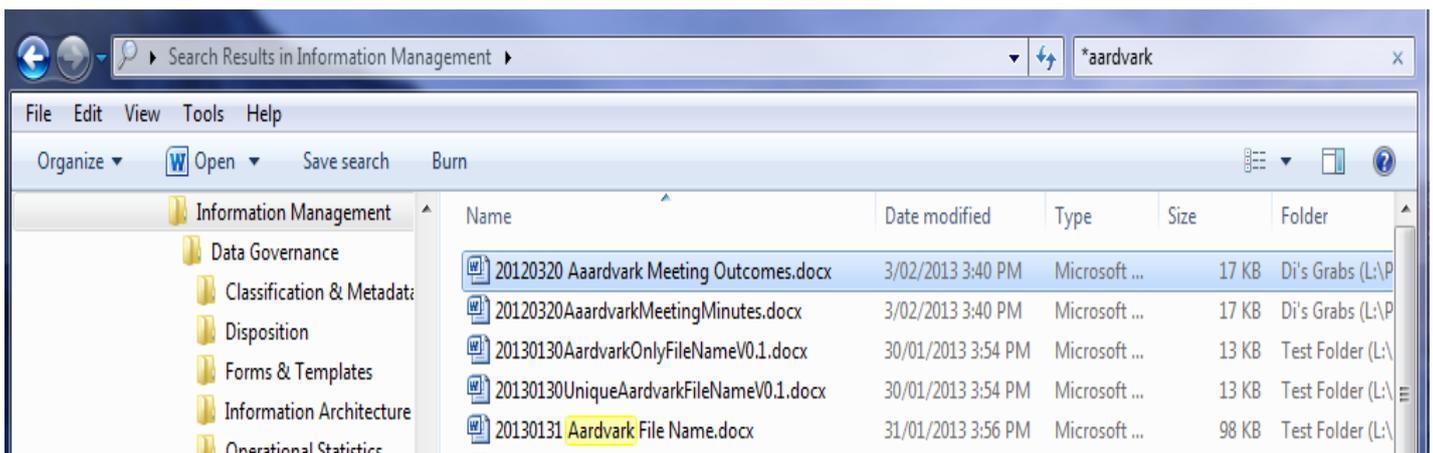
PC users can find electronic documents in a variety of ways:

Windows Explorer Search: Use Windows Explorer to search for documents located on your PC or network drives.

- The first step is to select the folder you wish to search in, then in the search box, type the criteria you wish to search on. In the example below, the search is on the folder "Information Management" and the search criteria is any file or sub folder name containing the keyword **aardvark**.

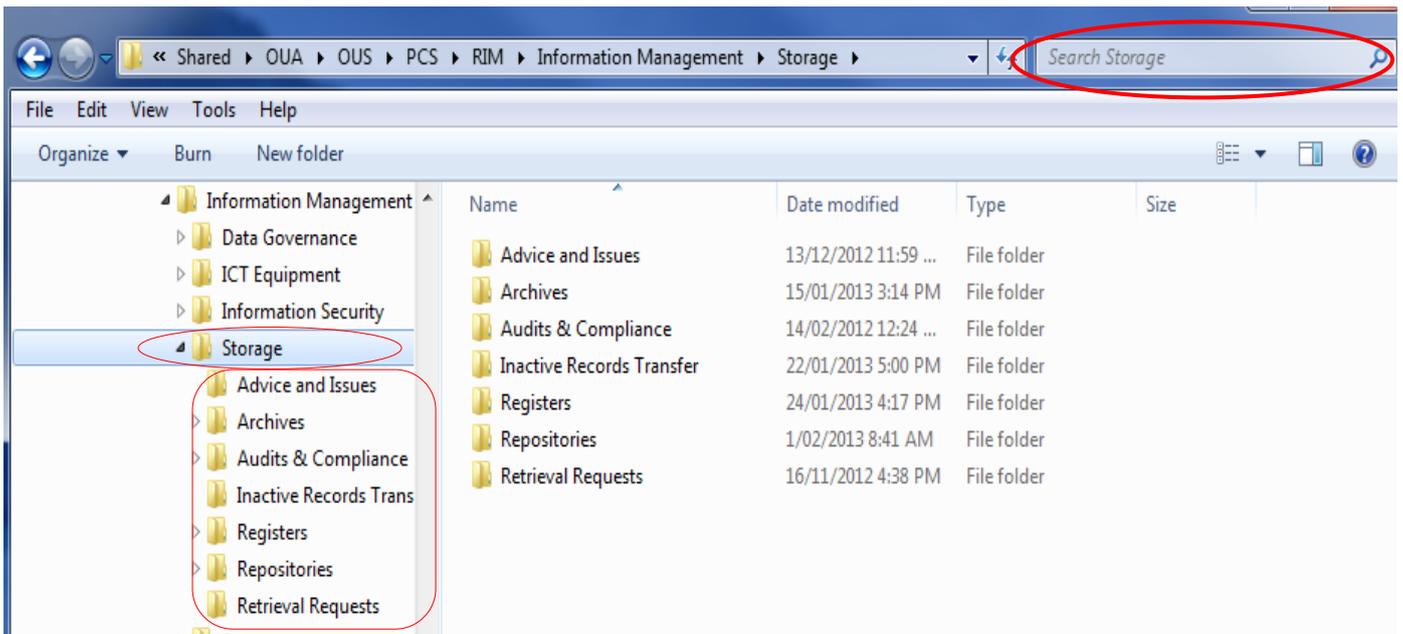


- **Note**, that by placing an asterisk in front of the word aardvark (***aardvark**), the search will pick up any files where words have been joined together in the file name – eg a search on just **aardvark** would not pick up the file named “20130131AardvarkMeetingMinutes.docx”, but a search on ***aardvark** would. For this reason, it is good practice to *always* use an asterisk in key word searches.
- Once you have entered your search criteria, any files and sub folders meeting the search criteria will be displayed. The result of the search on ***aardvark** is shown below.

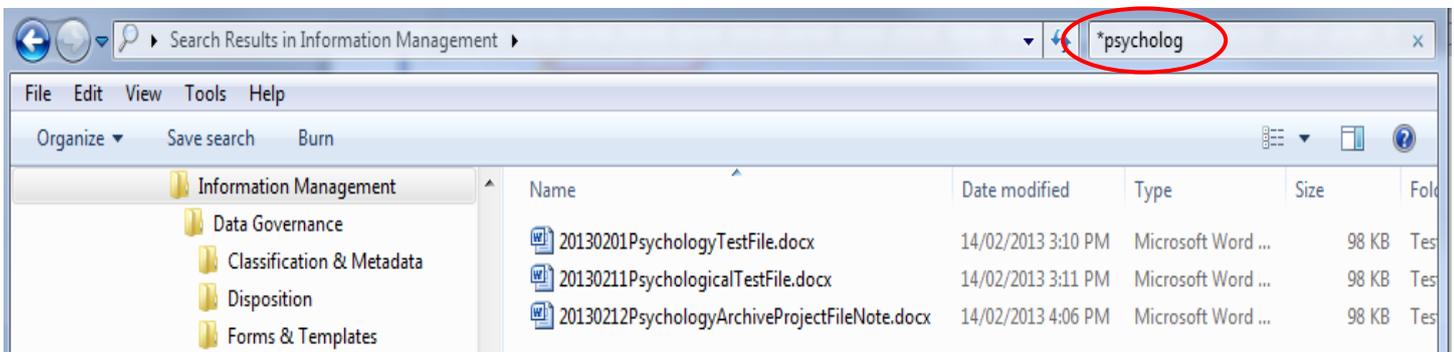


TIPS

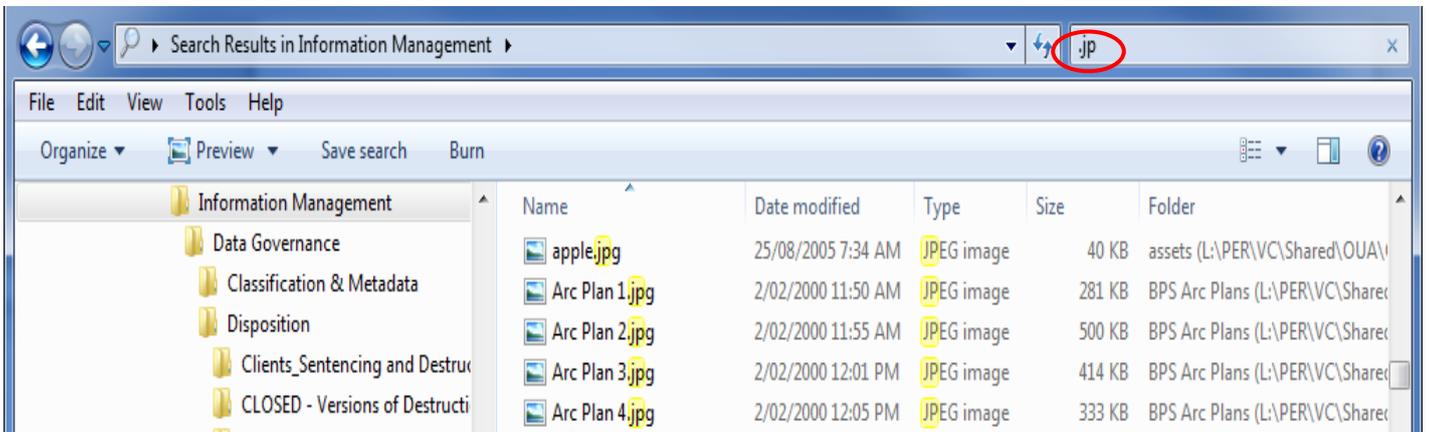
- **Folder selection** - You can search in any folder you have permission to access. If you are unsure which folder a document is located in then search at the highest folder level. This broad search will automatically look in all of the subfolders within the folder you have selected. In the example below, the Storage folder has been selected. As soon as a search criterion is entered into the search box it will check all of the subfolders within the Storage folder. Please note, however, that the higher the folder level, the slower the search will be, as there are more files to check against the search criteria.



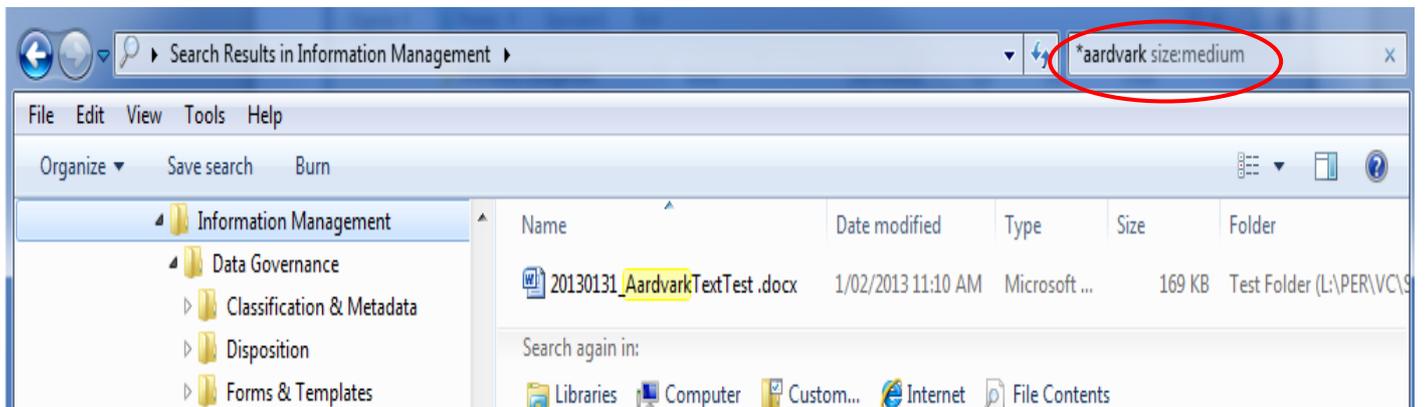
- Partial Keywords** - If you are not sure what word has been used in the file name, the search on partial keywords. For example, if you are not sure if the file name contains the word “psychology” or “psychological”, just enter ***psycholog** and the search will pick up either word.



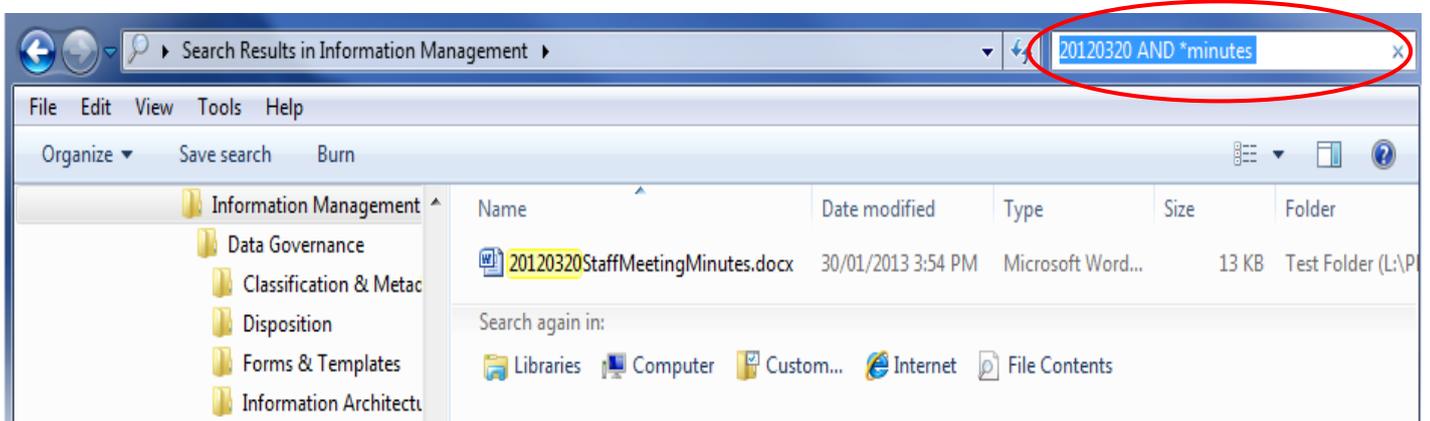
- **Search Criteria** - Keywords are a good search criterion, but you can also search on other criteria such as File Type, Date Modified, Size etc. If you are looking for specific file types then enter the file type into the search box – eg if you were looking for all JPEG images then type in the file extension **.jpg*** and all jpeg files will be displayed.



- **Additional filters** - It is possible to refine your initial search by including additional filters. Enter your first criteria (eg a keyword), then click in the search box and the option to include additional filters will appear. Select the additional filters as appropriate. The example below is a search on the keyword "aardvark" with the additional filter of medium sized files (100KB to 1MB).



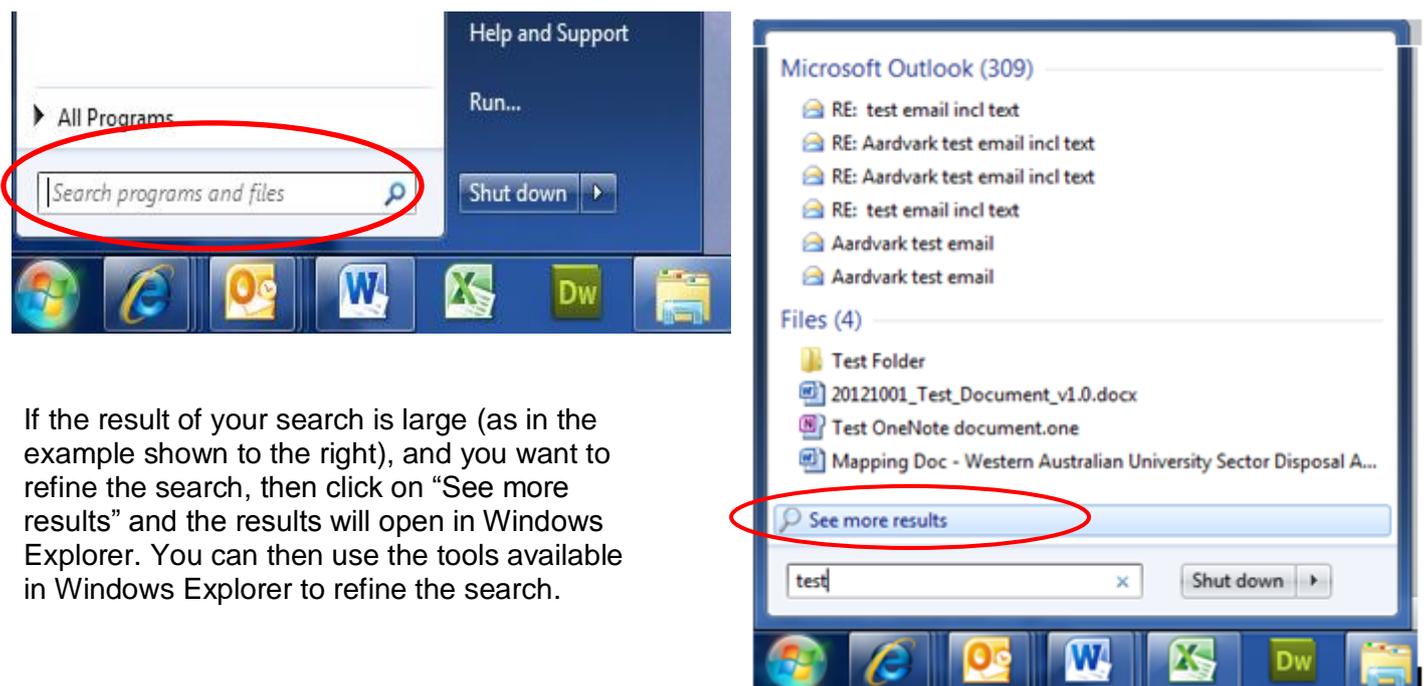
- **Boolean searches** - It is also possible to run Boolean searches where the search criteria are refined by including and excluding certain words such as **AND** or **OR** or **NOT** – eg the example below shows that to find the file “20120320StaffMeetingMinutes.docx” then you could enter two specific search criteria - **20120320 AND *minutes**. Windows will search for any document that meets *both* of criteria.



Another example would be if you wanted to search for all images in a folder but you don't know what format they are in. You might try the search criteria - **.jpg OR .pg OR .tiff OR .bmp OR .gif**. Windows Explorer would look for files with any of these file extensions.

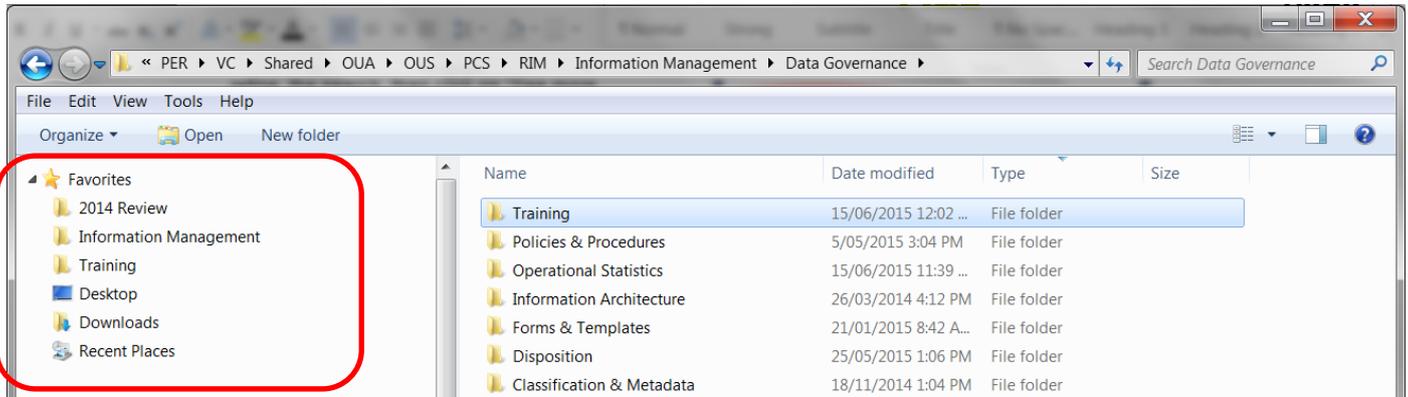
- **Sorting Results** - If your list of search results is large and unable to be further refined, consider sorting them by the column headings (such as Date modified, file type or size) as this may assist in locating the document you want to find.

Windows Search: Another way to search on a PC is to click on the Start button in the bottom left hand corner of your screen and enter a keyword to search on. **This is a broad search that will find all folders, documents, emails, calendar items, website favourites etc that contain the keyword.** This search option is useful if your keyword is very specific or if you want to search for emails held in an Outlook mailbox and other documents simultaneously.



If the result of your search is large (as in the example shown to the right), and you want to refine the search, then click on “See more results” and the results will open in Windows Explorer. You can then use the tools available in Windows Explorer to refine the search.

Windows Favourites: Another tool available in Windows is that you can create shortcuts to frequently used folders in the Favourites section of the Windows. Simply find the folder you want then click and drag it into the Favourites folder on the left hand side of the screen. Watch for the “Create Links in Favourites” message. A link or shortcut to that folder will now be saved in your Favourites List.



Retrieving Electronic Documents – Smartphones and tablets

- iPhone and iPad users with documents saved to their device’s memory, can also search for documents held on those devices via the device’s Spotlight search function.
- For android phone users most android phones come with a built in file manager function. If, not then consider downloading a file manager app.
- Most tablets will have a basic search function or some kind of office manager or files app can be used to find and manage files (e.g. My Files for the Samsung Galaxy).

Please note, however, that while we use portable devices to access and sometimes create Curtin documents, those documents need to be saved into the appropriate recordkeeping and information management system as outlined earlier.

Need assistance?

Please see the following related advice sheets:

- [Using a Shared Drive](#)
- [Document Naming Guidelines](#)

For more information please visit the Records & Information Management website at rim.curtin.edu.au

If you need assistance, please contact us by email at rim@curtin.edu.au