

## Key changes in ERMS upgrade 2019

Search	
Pre upgrade	Post upgrade
Search looks for documents	Search looks for folders and documents
User can select whether to search documents, libraries or folders	Automatically searches for folders <b>and</b> documents
Standard Search form offers range of fields to use	Standard Search form offers range of fields to use – also offers ability to search ERMS documents and Policy Library documents
Document search results can be saved, moved, copied or deleted	Search results can be moved, copied, deleted, checked in as a new revision, saved, saved as a link, emailed, followed, exported as a CSV document
Search results cannot be filtered except by using Standard Search form	Search results can be filtered by Date, Creator, record type, etc. using check boxes
Browse	
Pre upgrade	Post upgrade
Selected folder can access Properties and Get Link through buttons	Selected folder can access Properties, Freeze, Unfreeze, Close, Close and Clone through drop down menu or through right clicking on the folder.  These options (Properties, Freeze, Unfreeze, Close, Close and Clone) are also available by selection from contained folders on right screen
Selected folders not displayed in right hand screen	Selected folders displayed in right hand screen
Folder display details	
Pre upgrade	Post upgrade
Full folder names displayed on screen  ANU > Assets and Facilities > Acquisition and Procurement > MUL13-025 - Minor Works and Maintenance Contractor Multi-Use List	Folder names concatenated  ANU > Assets and Faci... > Acquisition and... > MUL13-025 - Minor Works and Maintenance Contractor Multi-Use List

<b>Mass update utility</b>	
<b>Pre upgrade</b>	<b>Post upgrade</b>
Operates on document search results	Operates on document and folder search results
<b>Folder creation</b>	
<b>Pre upgrade</b>	<b>Post upgrade</b>
Activated by right click on selected folder in the left folder menu	Activated by button in top right corner
<b>Folder metadata</b>	
<b>Pre upgrade</b>	<b>Post upgrade</b>
Standard folder metadata tabs – General, Security, Metadata, Advanced	Standard folder metadata tabs – General, Security, Metadata, Shortcuts, Advanced, Related Folders
<b>Document metadata</b>	
<b>Pre upgrade</b>	<b>Post upgrade</b>
Standard document metadata tabs – Summary, Metadata, Security	Standard document metadata tabs – Summary, Metadata, Security, Related Content
<b>Reporting</b>	
<b>Pre upgrade</b>	<b>Post upgrade</b>
Unable to export records in Browser environment	Able to export search results as CSV format in Browser environment