Tip 007: Using the Shortcut Bar

Primary Audience: All Users

Purpose: The Shortcut Bar, displayed down the left side of the EDRMS Content Manager desktop, provides quick access to collections of records. Some shortcuts are created automatically, such as Recent Documents and Containers. Others you can create yourself, such as Favourites and Trays.

### Favorites
To add items to your Favourites:
1. Tag the item (Record, Classification, etc.).
2. Click **F4**. The item will be added to your favorites.

To remove items from your Favourites:
1. Tag the item.
2. Right click and select **Remove From** and then **Remove From Favorites**.

**Favorites options:**
- **Locations**: displays a list of your favorite locations.
- **Classifications**: displays classifications that you have saved for further use.

**Workflows, Schedules, Thesaurus Terms and Templates** are not used.

- **Saved Searches**: displays searches you have saved for further use.
- **Document Queues**: displays document queues you have set up.

### Trays
You can add items to or remove items from the Records Work Tray, for quick retrieval:

To add records:
1. Tag the records.
2. Click **F3**. The records will be added to your Records Work Tray.

To remove records:
1. Tag the records.
2. Right click and select **Remove From** and then **Remove From Records Work Tray**.

**Trays options:**
- **Records In** and **Records Due** are not used.
- **Offline Records** displays the documents you are currently working on, both drafts and those checked out from EDRMS Content Manager.
- **Check In Styles** defines check in behaviour for email, including the links between specific container records and email folders.
- **Activities Due** is not used.
- **Documents Checked Out** displays only the documents you have checked out from EDRMS Content Manager.
- **Scheduled Tasks Tray** shows scheduled tasks for records and classifications that have their record class set to Vital.
Recent

- **Containers**: displays the last 25 containers (folders or boxes) you have used.
- **Recent Documents**: displays the last 25 documents you have used.

You can remove records from these lists:

- **Right click** and select **Remove From** and then **Remove From Recent Documents** or **Remove from Containers**.

- **To Do Items** is not used.
- **User Labels** are private shortcuts you have created to records you need access to. Refer to **Tip 038: User Labels**.
- **Meetings** is not used.