Central Queensland University

Records and Archives Office

TRIM @ CQU

Chancellery User Guide

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About TRIM @ CQU Chancellery User Guide

- This user guide has been designed to help CQU staff learn the TRIM basics. When reading this guide you will come across 2 icons which have been used to highlight important or helpful information.

IMPORTANT INFORMATION
This icon has been used to draw your attention to important information you should be aware of.

QUICK TIP
This icon has been used to showcase valuable advice, shortcuts or tips to make your TRIM experience even easier.

For up to date information relevant to CQU Chancellery TRIM users see the CQU Record and Archives web site at http://www.library.cqu.edu.au/services/libraries/corporate/records-archives/index.htm

Getting Started in TRIM

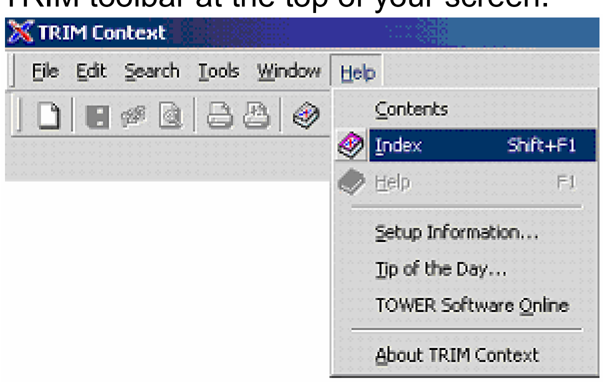
What is TRIM?

- TRIM Context has been implemented as Central Queensland University's solution for managing records.
- TRIM is an integrated Electronic Document and Record Management Solution (EDRMS) which is capable of managing CQU's corporate information. Using TRIM supports CQU in complying with our legislative record keeping requirements as well as enabling staff to access and retrieve vital information at their desktop.
- It is not important for you to remember every little detail about TRIM. It **is** important and helpful to understand the basic concepts and functions of the system.

TRIM Help

- For assistance with any problems you may be having while using TRIM, more information, to arrange TRIM refresher training or general CQU Recordkeeping queries, please contact the Records & Archives Office **email**: records@cqu.edu.au

  Webpage: http://www.library.cqu.edu.au/services/libraries/corporate/records-archives/index.htm
- **Don't forget** -- The **TRIM Context Help File** can also aid in answering any questions you may have while using TRIM Context. You can access the Help file via the Help Menu, SHIFT + F1 or by clicking on the TRIM toolbar at the top of your screen.

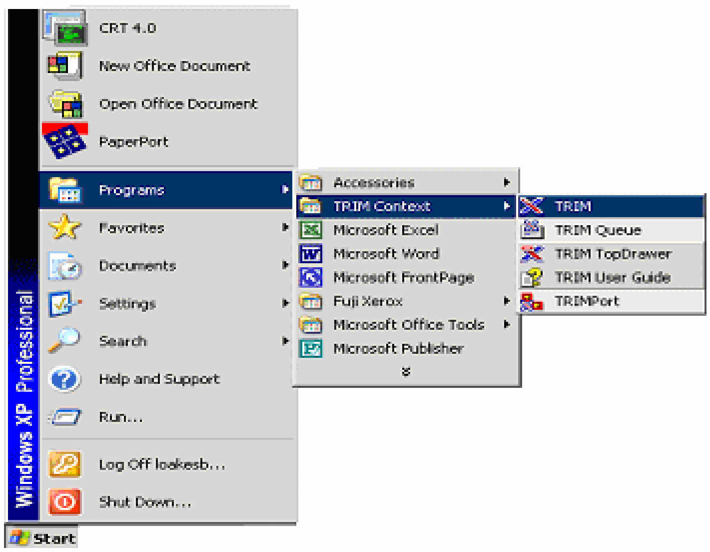


TRIM Navigation

Opening TRIM

- To Open TRIM Context, double-click the TRIM Icon 

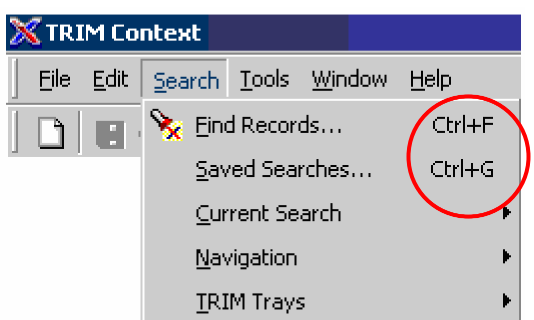
on your Desktop or **Start – Programs – TRIM Context – TRIM**



Menu, Toolbar or Keyboard Shortcut – Your Choice!

For most actions in TRIM there is usually a choice between Menu, Toolbar Icon or Keyboard Shortcut to perform the function.

- The **menus** in TRIM contain the commands for functions in TRIM and operate like any other Windows application.
  - Click on the menu you want, move to your choice and click e.g. **Search - Find Records.**



QUICK TIP
Keyboard Shortcuts are usually visible alongside a function's entry in the menu. e.g. **Find Records** Shortcut = **CTRL+F**

- The icons (tools) on the **TRIM Toolbar** provide a quick alternative to menus when performing TRIM functions.

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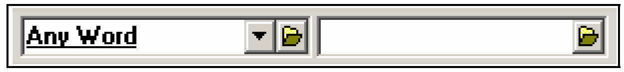
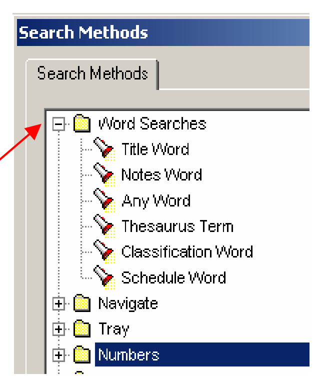
COMMONLY USED ICONS AND TOOLS ON THE TOOLBAR	
Quick Find	
New	Create a New Record/Item
Count Records	Counts the number of records found in a search
View Electronic	Shows the document of currently selected item
Print Document	
Help Index	Opens TRIM Context Help File
Find Records	Referred to as Torch Search Button
Refine Search	

- Hover the mouse over an icon on the toolbar to see its description.
  - The toolbar can also be customised to suit your needs by right-clicking on a blank part of the toolbar and selecting or deselecting tasks you want visible on your screen.

Navigation Shortcuts

- There are 3 navigation shortcuts in TRIM which have been designed to save time and make TRIM easier to use.

- **KwikSelect:** Clicking the yellow folder icon at the end of a field will display a **Select From** window offering a range of options for you to choose from.
- **Drop-down Arrow:** Click on the black arrow to select from a range of choices in that field. (e.g. recent searches)
- ⊞ **Plus Sign:** This indicates there is more detailed information available. Click on ⊞ to expand and display.



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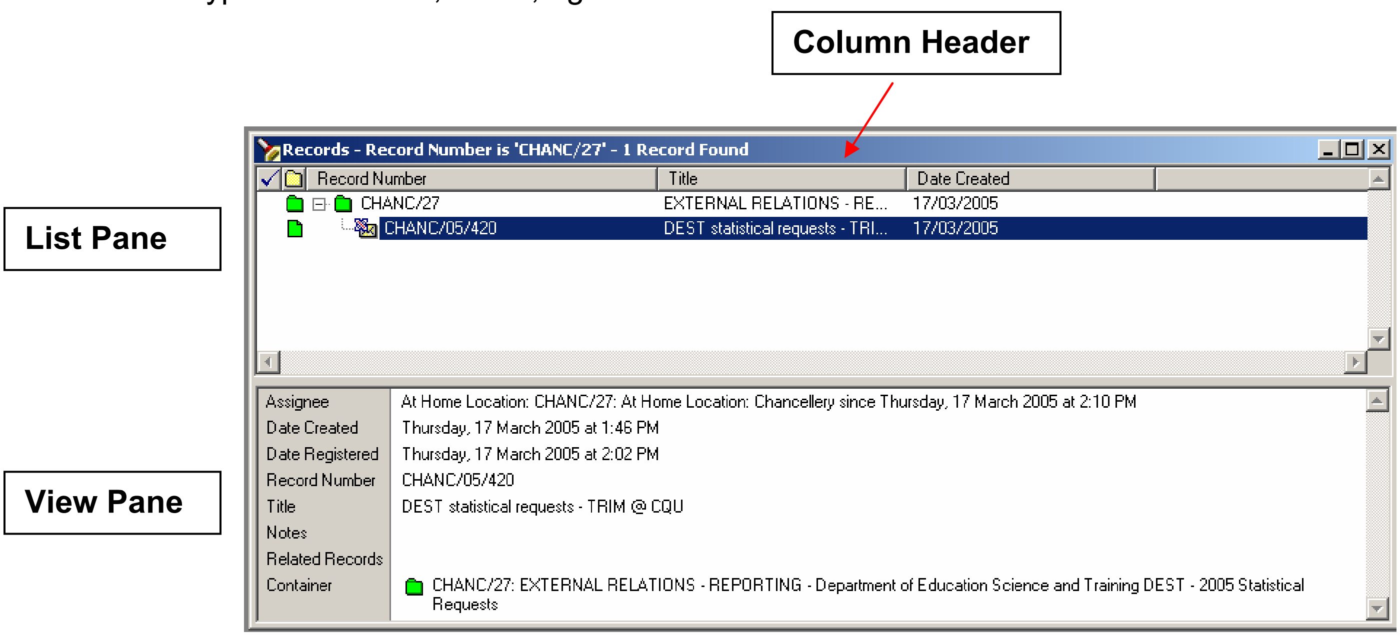
- The **results windows** displayed in TRIM are divided into 2 panes:
  - **List Pane** –Displays the entries in a list – e.g. the items retrieved in a search.
  - **View Pane**- Bottom half of the results window. Displays the details for the selected entry in the list pane. (it shows the metadata of the highlighted record)
- Use the **Column Headers** of the list pane to organise your list.
  - Click once – ascending order
  - Click again (click twice)- descending order
- Clicking on the Record Type Column Header will sort the list by record type – document, folder, agreement etc.

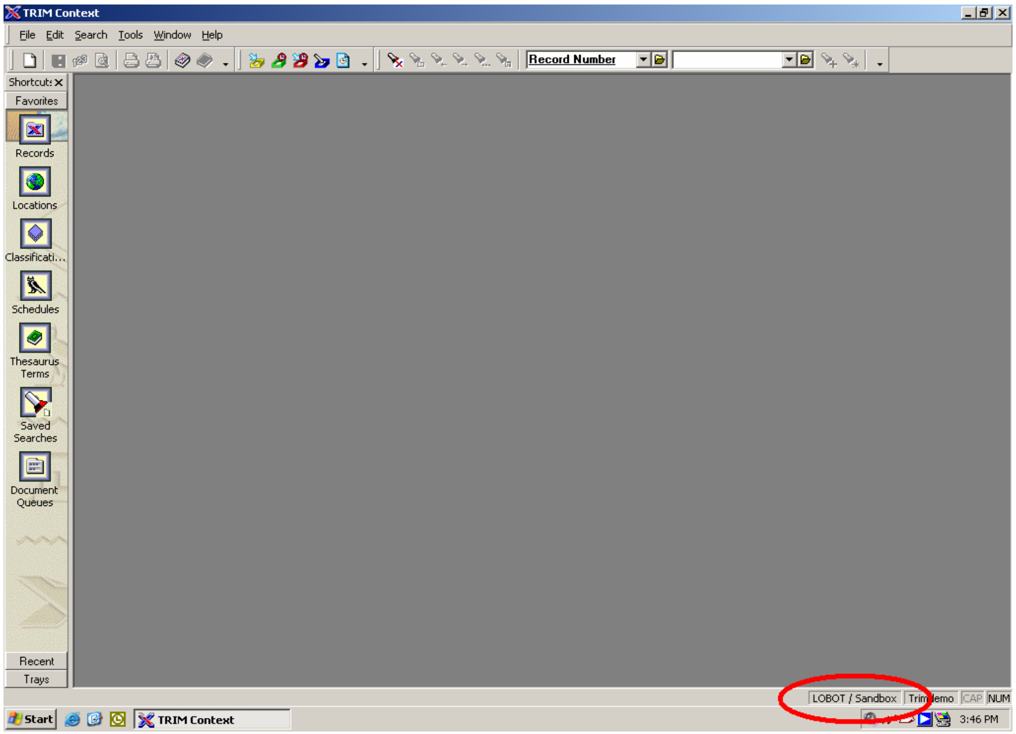


- You can customise what is displayed in the View Pane by right-clicking anywhere in that half of the screen. Select **Customize** to select the fields you want to move, add or remove from the View Pane for that Record Type. This will only change the view on your screen and will need to be done for each record type if necessary.

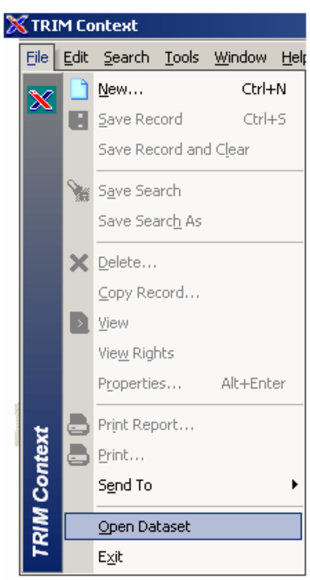
QUICK TIP
You can open a record's container to view other records that are enclosed in the same container by double-clicking on the container field entry of the View Pane.

Changing Datasets

- Open TRIM Context. The dataset you are currently accessing will be displayed on the bottom right-hand side of the screen.



- If you need to change datasets, click on **File** Menu and select **Open Dataset** as shown.



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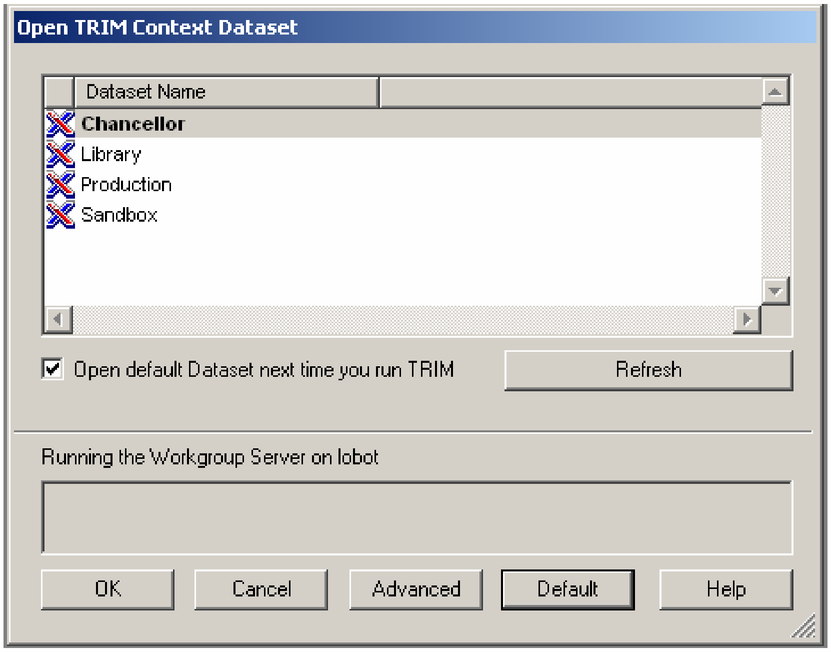
- The Open TRIM Context Dataset box will now appear.



- Click on the dataset you wish to access and then **OK**.

Chancellor is the "LIVE" dataset.
Sandbox is the "PLAY" dataset designed for training purposes.

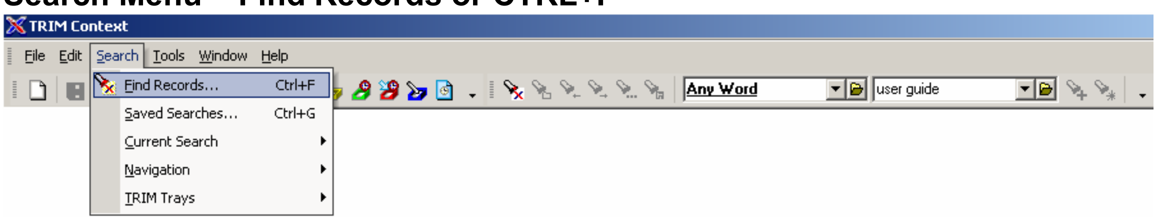
Searching in TRIM

- Searching is the starting point for most actions in TRIM. TRIM offers a number of different search methods.
- Useful and relevant search methods include:
    - Word Searches
    - Date Searches
    - Record Number Searches

Before capturing a new record it is vital that a search is performed to ensure that the record has not been captured into TRIM already. Searching also ensures that records about the same topic are related or enclosed in a folder.

- There are two main ways to access these Search Methods:

    - **Search Menu – Find Records or CTRL+F**



- **The Quick Find Function on the Toolbar at the top of the Screen**

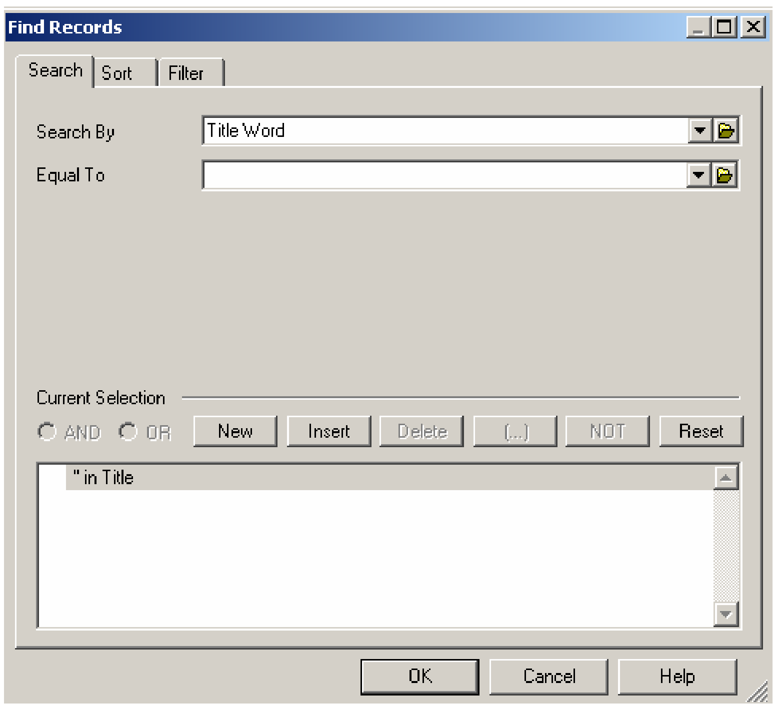
- The Quick Find Function allows you to select a Search Method and enter a search term – all at the toolbar.

- The Search Menu, CTRL+F, and the Torch Search Button all lead to the same **Find Records** Dialog Box allowing you to select the search method you wish to use to retrieve the records.

Word Searches

1. Click on the **Search** Menu at the top on the screen and select **Find Records** from the menu.

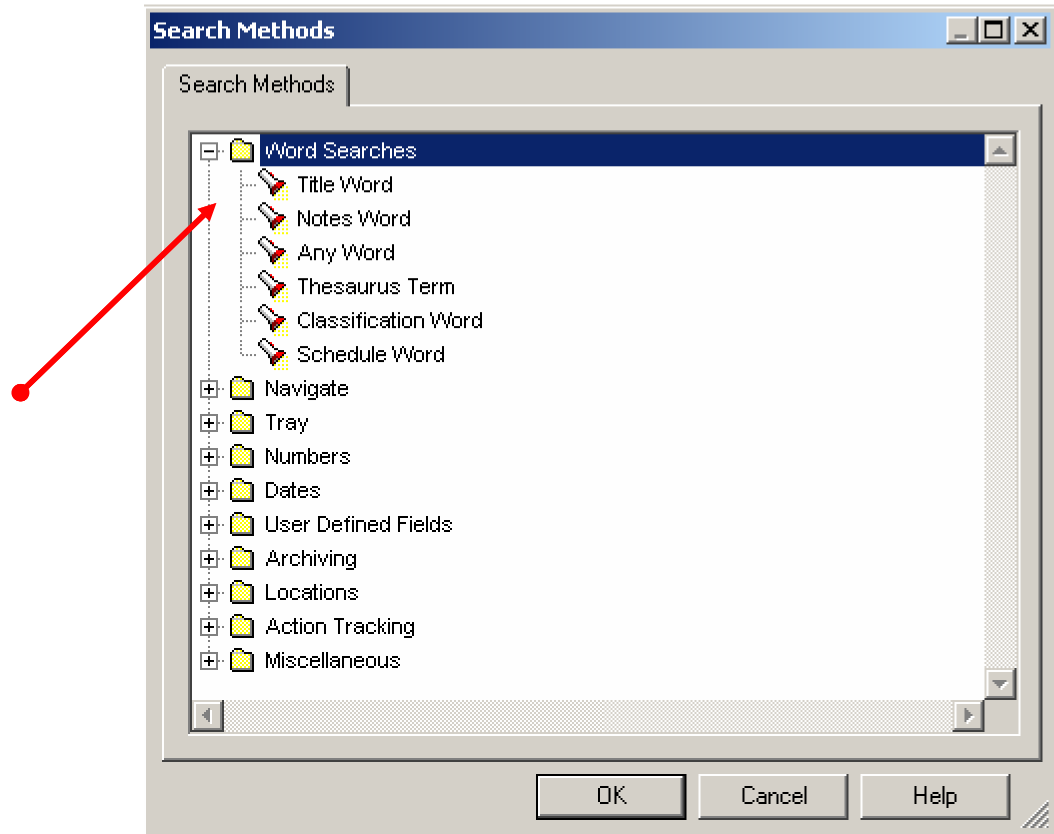
2. The **Find Records** Box will appear.



QUICK TIP

Click on the torch search button on the toolbar OR hold down **CTRL+F** on the keyboard to bring up the same search screen faster than the menu.

3. **Search By:** Use the pull-down arrow to select from your most recent Search Methods or use the KwikSelect on the **Search By** field to select a Search Method from a list of categories.



4. Click on the ⊞ next to a category to select a Search Method. The list of available search methods in the **Word Searches** category is shown above.

Commonly used Word Search Methods

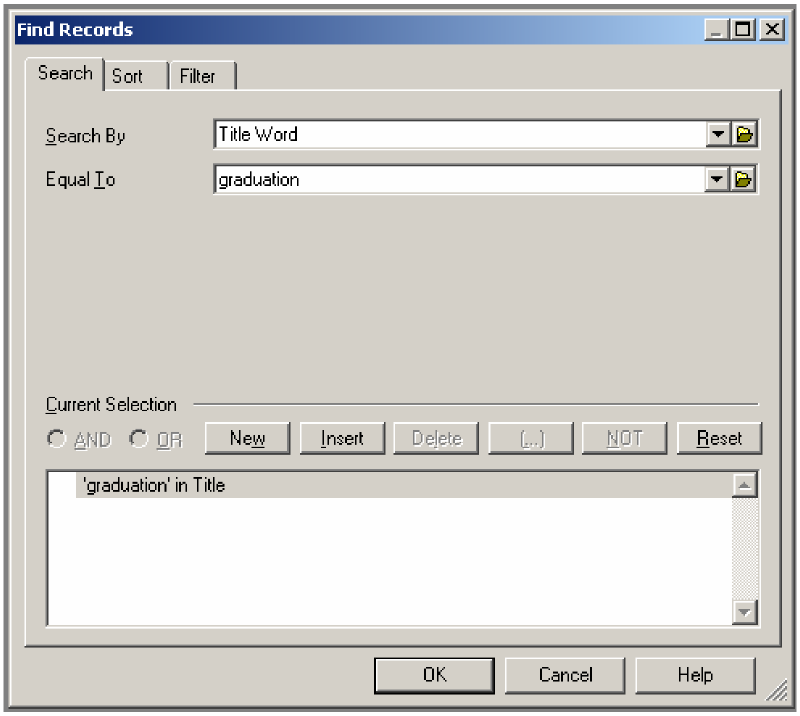
Title Word - Any word that appears in a record's title. Searches only in the Title fields. If you enter more than one word, TRIM Context will return a list of records that have both words in the title

Notes Word - Any word that appears in the notes attached to a record.

Thesaurus Terms - Search by Thesaurus Terms using the KwikSelect to display all available Thesaurus terms. The Search Results box will display records assigned to a word from the Thesaurus.

Any Word – Searches in Title and Notes Fields and includes thesaurus terms.

5. Once you have selected a Search Method, TRIM will display the **Find Records** box again for you to enter your search information.
6. Enter the word/s you want TRIM to search for and click **OK**. All records matching your search criteria will be displayed.

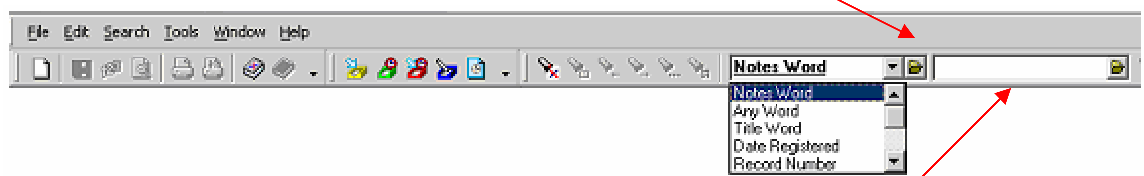


- **Example**: If we want to find all records with the word *graduation* in the title.
  - **Search By** field is the search method which we have just selected – Title Word;
  - **Equal To** field is where the word we want to search for is entered - in this case *graduation*.

QUICK TIP
You can perform **Wildcard Searches** by typing in at least the first 3 letters of a word before an asterisk *. Typing **grad*** will return records with graduation, graduate and so on.

Toolbar Quick Find

- You can also use the **Quick Find** Function located on the TRIM Toolbar at the top of the screen for word searches.
- This handy little tool saves recent searches. Use the drop-down arrow to access search methods used recently or the KwikSelect to choose a new search method.

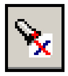


- When you have selected a Search Method,
    - Type in the word you are searching for in the **Equal To** field on the right and then press **ENTER**.
- This will display all records within your search criteria.
- You can also view recently searched for words in this field by using the dropdown arrow. This is very useful if you need to perform a new search using an often searched or recently searched word.

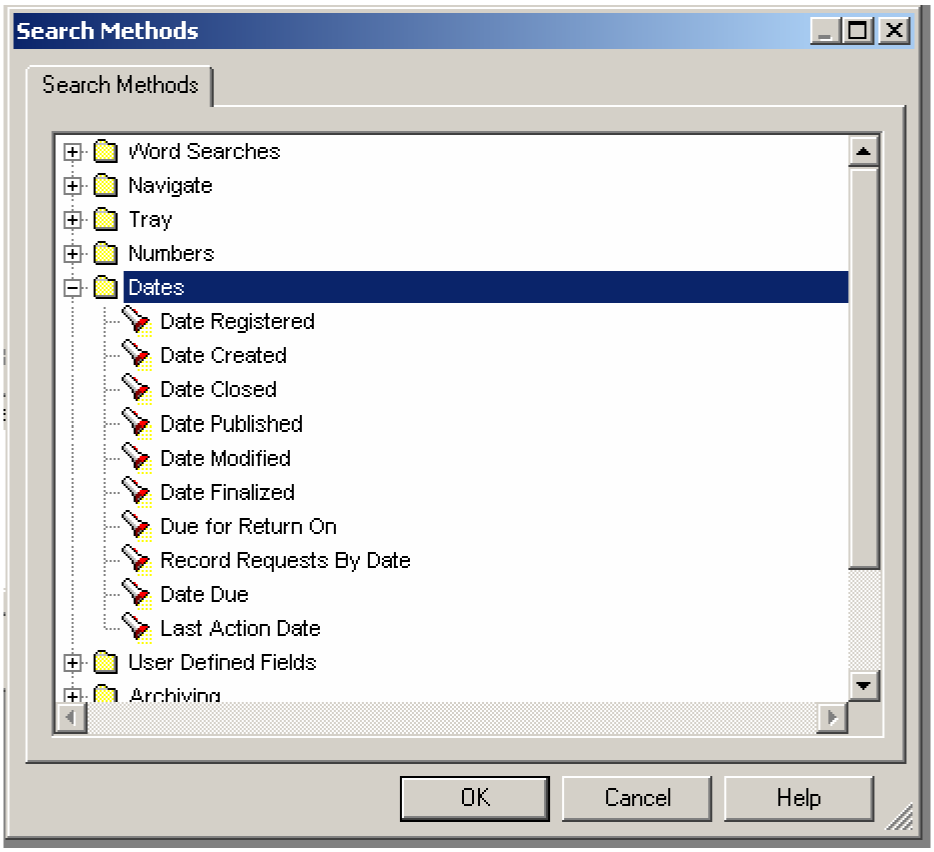
SEARCH FIRST
Searching tells you if a document is already in TRIM or the presence of similar documents or folders. It is vital that records about the same topic are related or placed in the appropriate folder for easier and more effective retrieval.

Date Searches

1. Click on the Search Menu at the top of the screen and select **Find Records**.

   Alternatively, the  Torch button on the toolbar will open the Find Records Box.

2. Use the KwikSelect button or the drop-down arrow to choose a Date Search Method and use ⊞ to expand the date category.



Common Date Searches

- **Date Registered** –The date the record was first put into TRIM Context. You will be prompted to enter a date range using the calendar.
- **Date Created** – The date the document was physically created, i.e. the date on a letter. You will be prompted to enter a date range using the calendar.

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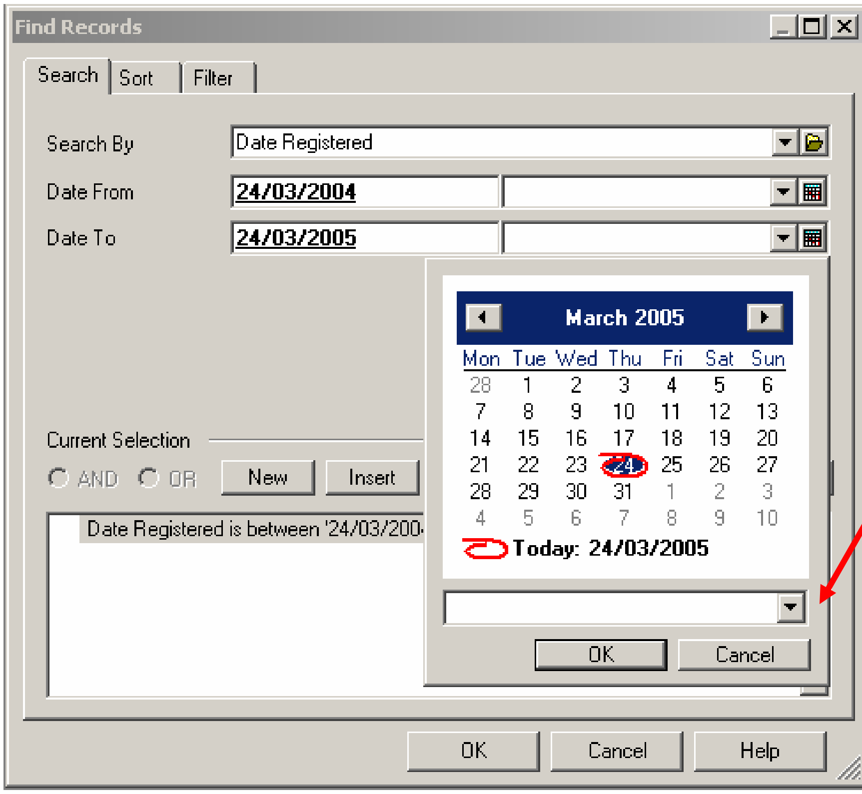
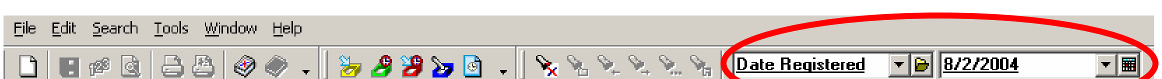


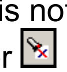
QUICK TIP
Clicking on the drop-down arrow gives you a number of preset choices eg Next 14 days, Next 7 days etc

3. The current date will automatically be displayed in the **Date From** and **Date To** fields. To search on a date range, click on the small calendar icon at the end of the field/s and use the calendar that is displayed to select a 'from and to' date range for TRIM to search.
4. When you have entered the dates click OK and all records within that time frame will be displayed.

Toolbar Quick Find

- You can also use the **Quick Find** function located on the TRIM toolbar at the top of your screen for date searches. This tool is very useful as it saves the searches you have recently carried out.

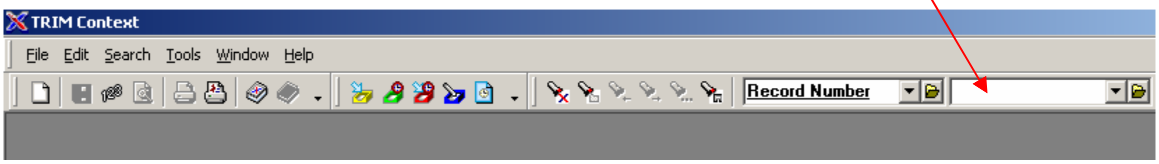


- This is a quick option when you know the exact date a document was created or registered into TRIM or if you have searched on that date recently.
- When using the Quick Find function you can only enter a single date and not a range. If the exact date is not known, the **Find Records** box from the **Search Menu**, **CTRL+F** or  is the better choice as it allows for searching within a date range.

Record Number Searches

Toolbar Quick Find

- The Toolbar Quick Find function is very effective when searching for record numbers.
- Select **Record Number** as your search method from the drop-down list or using the KwikSelect and type a record number into the **Equal To** field and then press **ENTER.**



- For this search to work you must enter a record number exactly.
- Make sure your record number is in the correct format. For example -

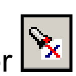
CHANC/999	Containers/Folders
CHANC/05/9999	Records
AGREE/05/9999	Agreements

- You may also type in part of the number (for example: CHANC/04/) and use the KwikSelect to display a list of all record numbers with that beginning.

QUICK TIP

Don't forget - using the black drop-down arrow at the end of search fields will show the most recent searches. These saved searches may save you time if you are repeating a recently performed search.

Using the Search Menu

You can also use the Search Menu – Find Records, **CTRL+F** or  on the toolbar to perform a Record Number search using the Find Records Box.

1. Select Record Number from the list of past searches using the black drop down arrow on the **Search By** field or by using KwikSelect to bring up a categorised list of Search Methods.

2. Expand the **Numbers** category using ⊞ to find **Record Number.**

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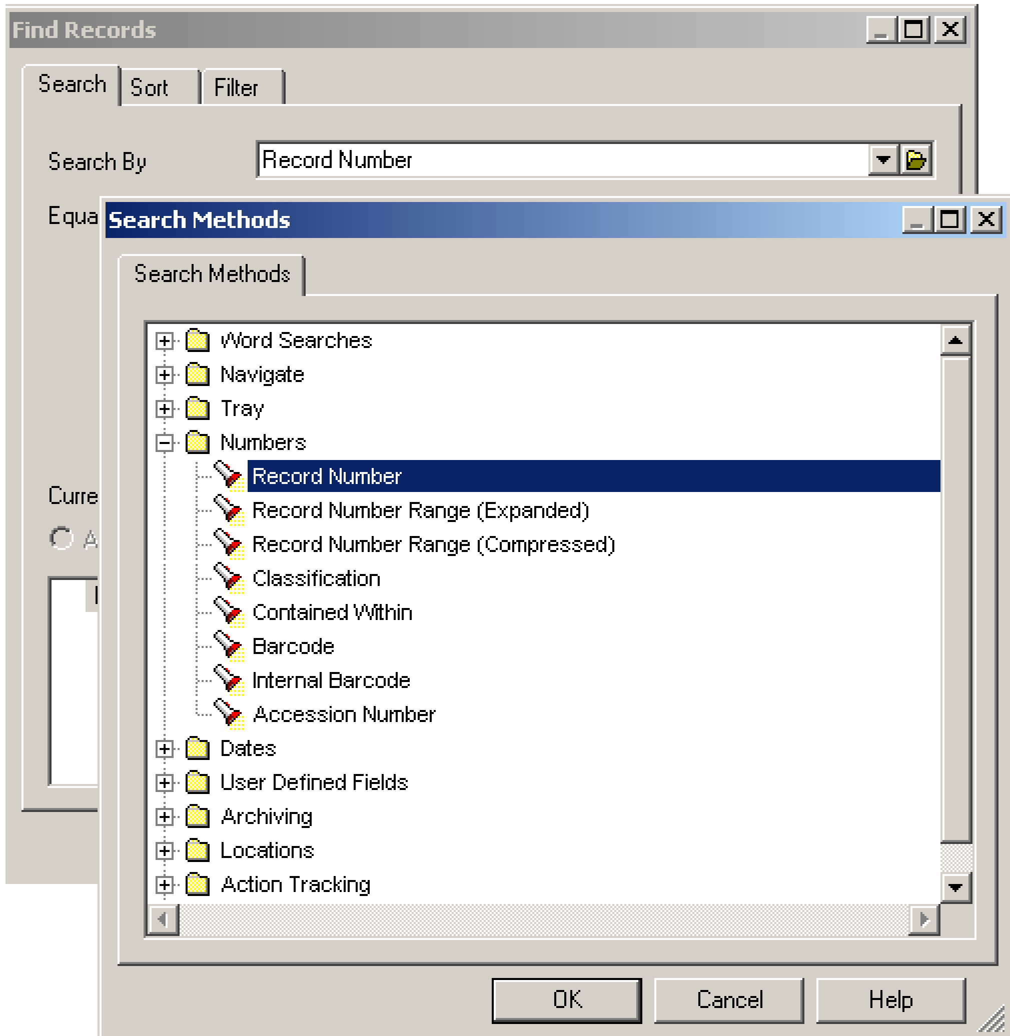

3. Click **OK** and enter the record number you are searching for in the **Equal To** field of the Find Records Box.

BE EXACT.

Record Numbers need to be entered exactly and in the correct format for a Record Number search to be effective**.**

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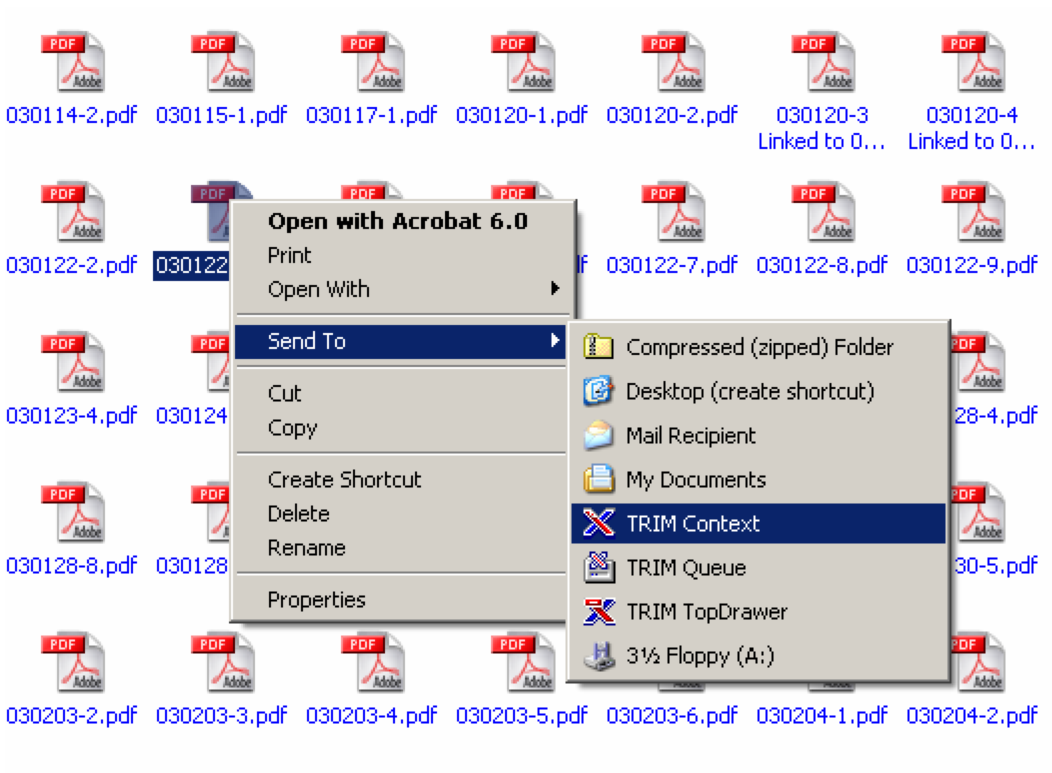
Creating New Records

Scanned Documents, Word and Excel

Capturing Word and Excel documents as well as scanned documents into TRIM is done simply from your desktop using the **Windows Send To** function

1. Open My Computer/ Windows Explorer to the directory which contains the document you wish to TRIM.
2. Highlight the relevant document in your directory and right-click your mouse. Select **Send To → TRIM Context.**

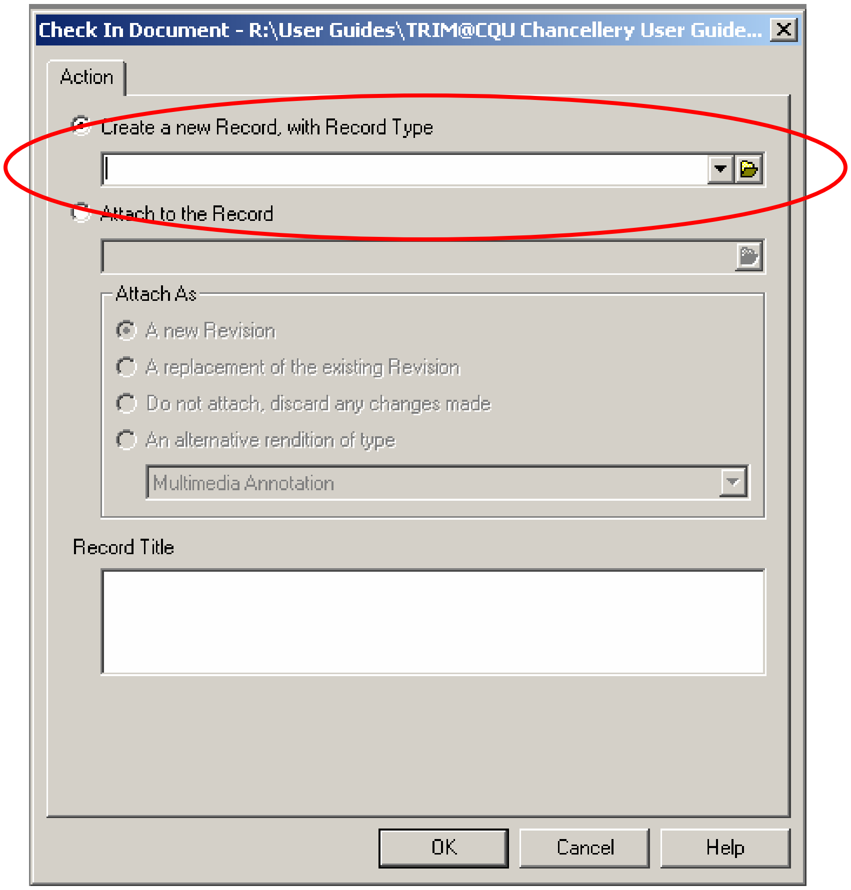


3. TRIM will automatically open when you right-click and **Send To** TRIM Context. Make sure you have accessed the correct dataset. (see Changing Datasets)

Scanned Documents

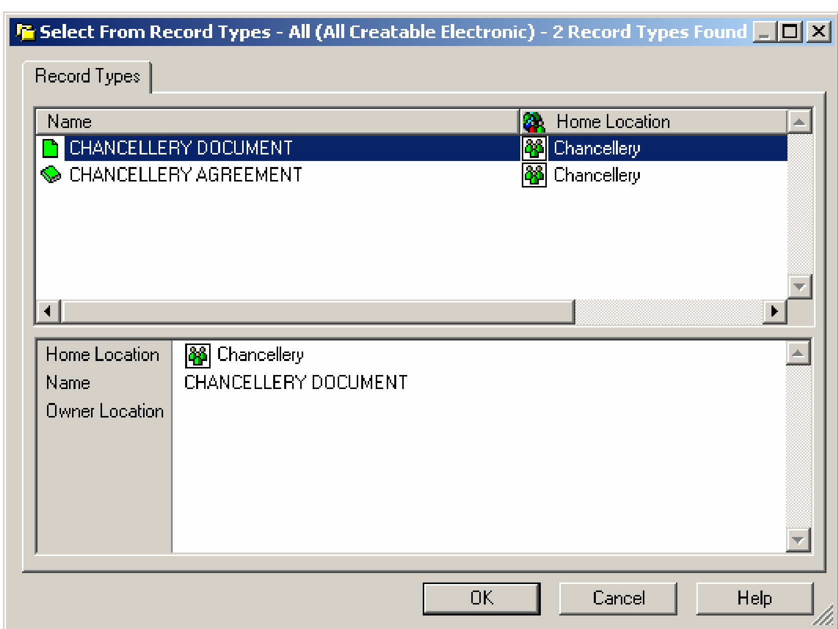
When capturing a scanned document, make sure that it has been converted to PDF format (*.pdf). PDF's occupy less space compared to *TIFs and other scanning file formats.

4. The **Check In Document** Dialog Box will display.



5. Select **Create a new Record with Record Type**. This is the default option and will already be highlighted.

- The record type options will be displayed by clicking the KwikSelect .



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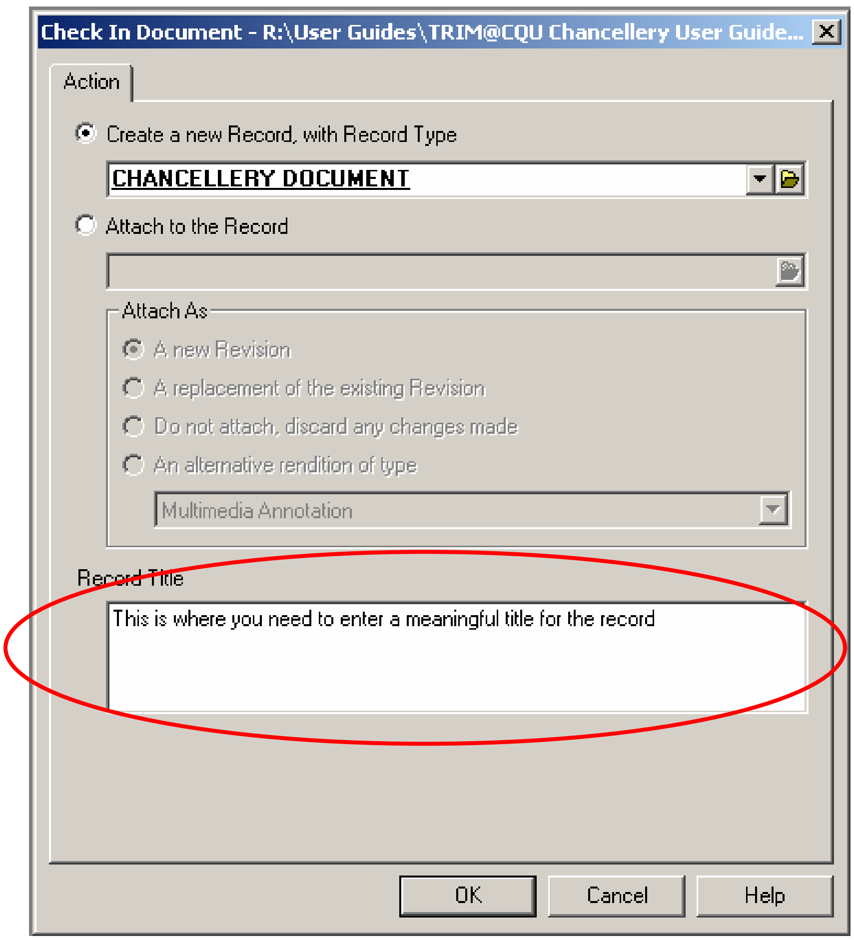
6. Select CHANCELLERY DOCUMENT.

- To create a Folder see Creating a Chancellery Folder
- To create an Agreement see Creating a Chancellery Agreement

7. Select OK to return to the Check in Document dialog box.

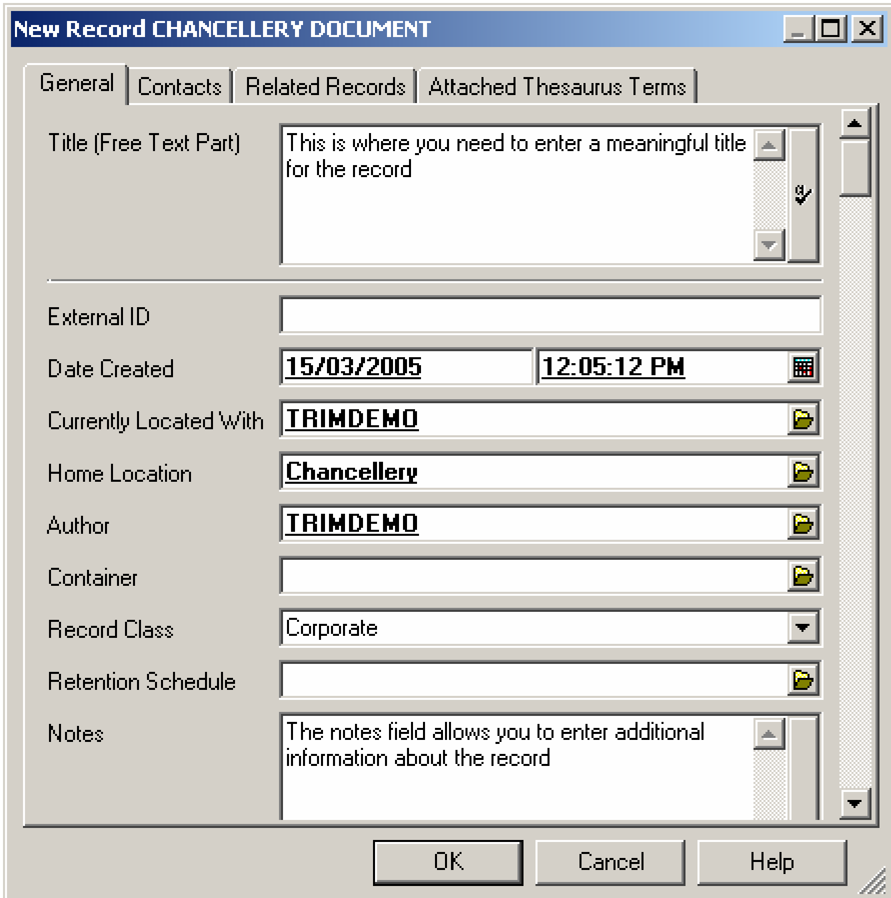
8. Enter a title for your record in the Record Title field as shown. The title will best describe the contents of the record.



IMPORTANT!

- A meaningful title will ensure that records can be found and retrieved efficiently - now and in the future.
- The CQU Records Management Guidelines and TRIM Data Entry Standards must be followed when titling TRIM records and folders.

- When a title has been entered click OK. A **New Record CHANCELLERY DOCUMENT** dialog box will appear. The title entered in the previous screen will carry over. This can be changed or edited in this screen if necessary.



9. You now need to establish the properties of the TRIM Record by completing the applicable fields in the New Record CHANCELLERY DOCUMENT dialog box.

10. **External ID**: If there is a reference number on the document, you can enter this external reference into the External ID field. This offers future users an extra field to search on.

11. **Date Created:** It is important to change the Date Created field to reflect the document's date of creation i.e. the date on a letter and NOT the date the letter was captured in TRIM.
    - You can change the Date Created by typing the date in the field or by using the Calendar icon  at the end of the field.

12. **Currently Located With:** This field is used to track the current location of the original hard copy of the document.

    - TRIM will default this field to your position. If you do not have possession of the original hard copy of the document, delete the defaulted position and use the KwikSelect to choose the appropriate replacement location. The replacement must be a position and not a personal name.

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- Each time the original hard copy is moved to a different location, the 'Currently Located With' field of the TRIM record must be updated to reflect this.

13. **Author:** The author is the person whose words the document reflects.
    - If the document has come from an external company or person, delete the author and leave the author field blank.
    - To change the author, click the KwikSelect and begin typing the surname of the correct author. Click OK.
    - You can then select the appropriate author from the options.
    - If the author is from CQU but not a location in TRIM select **Central Queensland University** as the author of the record
14. The **Notes** field allows you to enter additional details or information regarding the record you are working with. This is usually information that is important but doesn't fit into any of the other fields available. For example - notes about actions such as Forwarded onto DVCR for response 10 January 2004

QUICK TIP

There is a **spell check** available on Title (free text) and Notes fields. **Correct spelling means accurate titling** which is essential for effective searching. Check names and acronyms e.g. DEST are also correct.

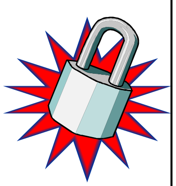
15. **Container** field. Use this if you need to enclose the record into an existing folder.
    - Click the KwikSelect on the **Container** field. This allows you to search for the folder (see Searching in TRIM)

      OR
    - Use the drop-down arrow which saves the recent history of folders you have accessed.
- Select the correct folder and the record will be automatically enclosed in the folder when created.
- If you need to make a new folder for this record, leave the container field blank. You can create a new folder after this record has been saved and enclose the record then.

16. When all applicable fields are complete click OK.
- The record has now been captured and TRIM will display the record.
- The entire record title will be displayed when the mouse hovers over the record title.

Now your record has been captured in TRIM…

- To view the document, simply double-click on the record.
- On the hard copy, write the record number e.g. CHANC/04/9999 to allow hard copy users to perform TRIM record number searches in the future if necessary.
- It is important that the **Currently Located With** field is updated each time the original hard copy is sent on. Right-click on the highlighted record - Select **Properties** and change the location in the Currently Located With field using the KwikSelect.
- If you need to change any of the information you have entered for the record, right-click on the highlighted record. Select **Properties**. If you have appropriate access you will be able to modify the information entered.
- Ensure that any associated correspondence is **related to** the new record you have created (if there are only 2 records) or **contained within a folder** if required. (see Searching in TRIM, Relating Records and Creating Folders)
- **Record Requests and Resubmits** – You can also request a record be sent to you either once (request) or on a regular basis (resubmits) if required. (see Record Requests and Resubmits)



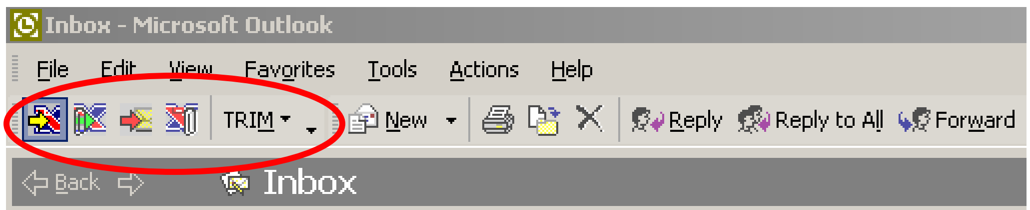
SECURITY

Access to Chancellery TRIM Records is restricted to CQU Chancellery Users. TRIM Chancellery Users have access to all Chancellery Records unless the record has been given specific security and/or access controls restricting viewing. **If security is required for a particular record please email the Records & Archives Office.** Email: records@cqu.edu.au

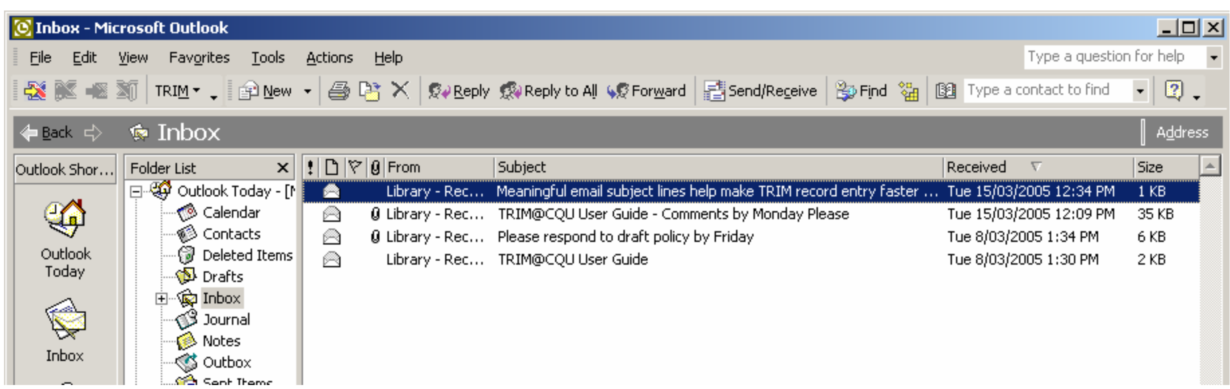
Creating New Records from Email

Cataloguing Emails from Outlook

- Electronic messages (emails) are a vital part of CQU's external and internal communication systems.
- **Emails created or received in the course of business are public records and need to be captured and maintained as full and accurate records for legal, regulatory and business continuity purposes.**
- At CQU the user is able to capture emails straight from their Microsoft Outlook into TRIM using the TRIM Context Toolbar in Outlook.



1. In your Outlook folder, highlight the email you wish to capture in TRIM.



2. Click on the appropriate TRIM icon on the toolbar. Hover the mouse over the icon to see a description.

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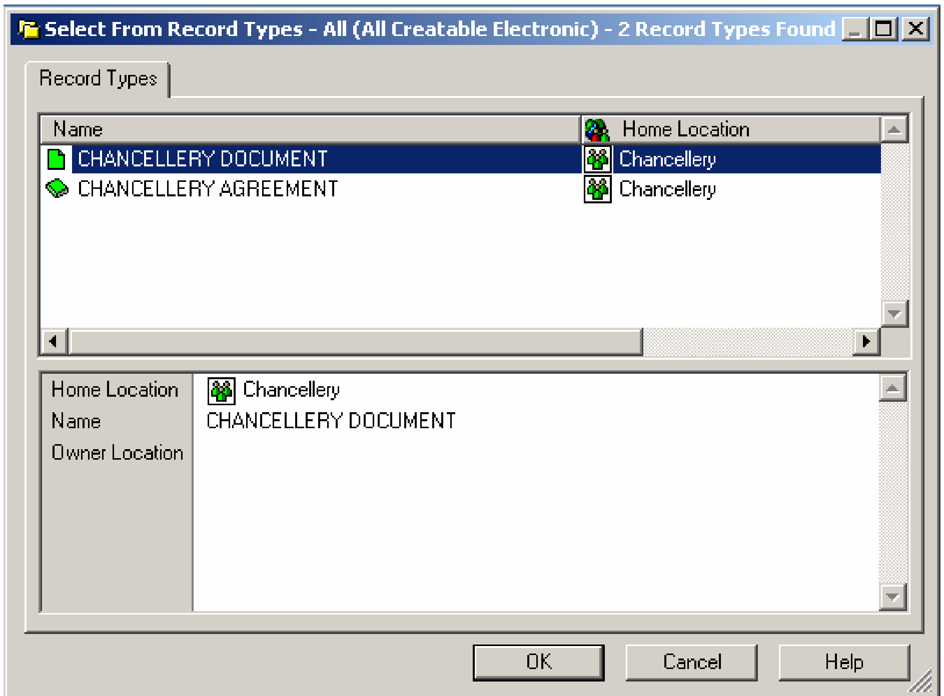
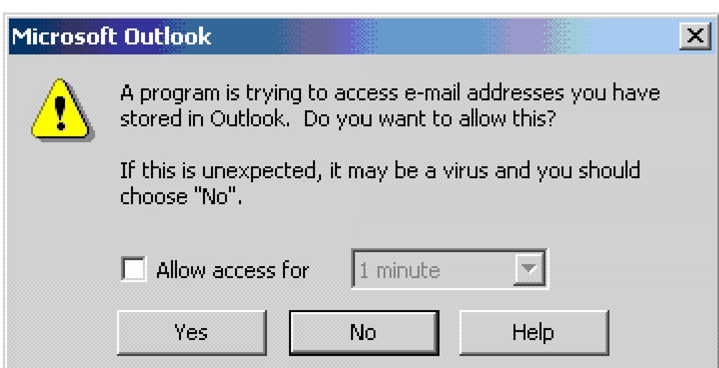
- If your email has no attachments the Catalog icon will be the only icon active on your TRIM toolbar.  . Click on this icon to send the email to TRIM.
- Also use the Catalog icon if your email has attachment/s and you wish to capture the message and its attachment/s as one record. See Emails with Attachments for other options.

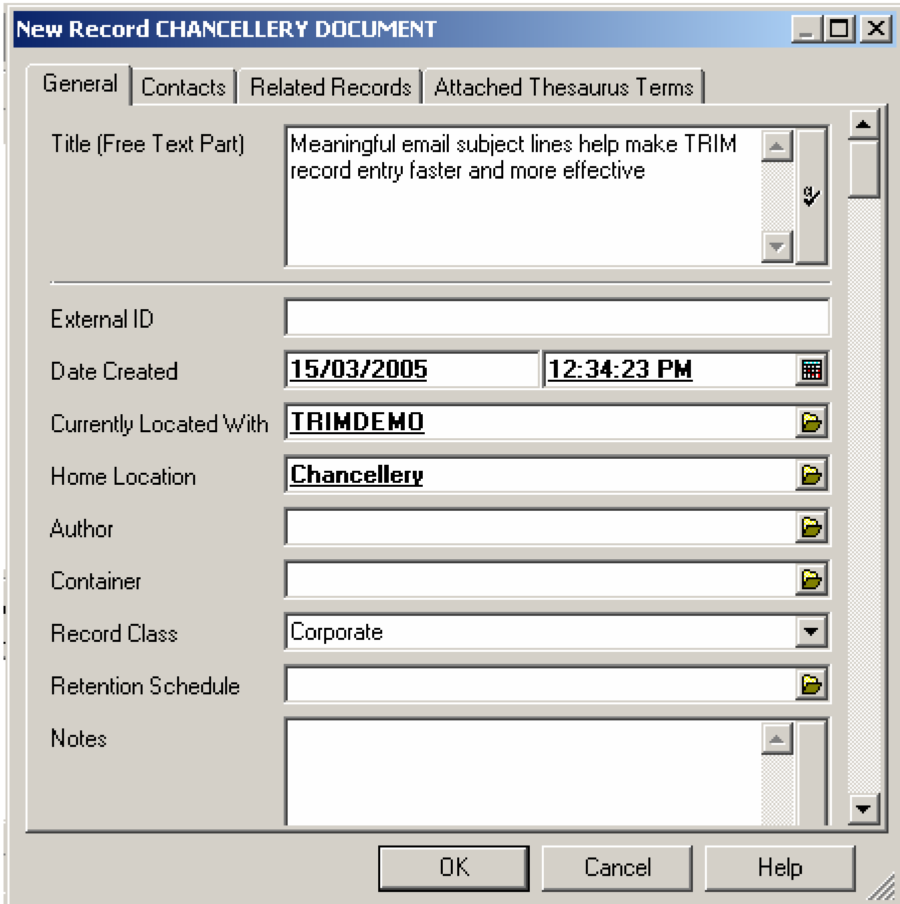
3. The **Select From Record Types** dialog box will appear. Select **CHANCELLERY DOCUMENT.**



4. An Outlook Dialog box may appear asking to access email addresses stored in Outlook. If this appears, tick to allow access and click **YES.** This allows TRIM to access Outlook and retrieve the email you have selected.



5. A new Record **CHANCELLERY DOCUMENT** entry form will appear.
    - The subject line from the email will be shown as the Title. If the subject line does not reflect the content of the record, enter a meaningful title that does. (Refer to CQU Records Management Guidelines and TRIM Data Entry Standards for assistance with titling TRIM records)



6. Complete the relevant fields of the TRIM ecord.
7. **External ID**: If there is a reference number on the email, you can enter this external reference into the External ID field. This offers future users an extra field to search on.
8. **Date Created**: Date the email was sent/received
9. **Currently Located With**: This field is used to track the current location of the original hard copy of the document. For email records you do not need to change the Location as TRIM will default this to your position.
10. **Author:** The author is the person whose words the email/document reflects.
    - If the email has come from an external company or person, delete the author and leave the author field blank.

- To change the author, click the KwikSelect and begin typing the name of the correct author. Click OK.
- You can then select the appropriate author from the options.
- If the author is from CQU but not a location in TRIM select **Central Queensland University** as the Author of the record

11. The **Notes** field allows you to enter additional details or information regarding the record you are working with. This is usually information that is important but does not fit into any of the other fields available. Eg - Notes about actions such as: Forwarded to Registrar for comment 15 January 2004

12. **Container** field. Use this if you need to enclose the record into an existing folder.

- Click the KwikSelect on the **Container** field. This allows you to search for the folder (see Searching in TRIM)

  OR

- Use the drop down arrow which saves the recent history of folders you have accessed.
- Select the correct folder and the record will be automatically enclosed in the folder when created.
- If you need to make a new folder for this record, leave the container field blank. You can create a new folder after this record has been captured.

13. When all applicable fields are completed click **OK**

- The record has now been captured and TRIM will display that record.

Emails with Attachments

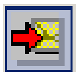
- When cataloguing emails with attachments you have a number of options to choose from to best suit your requirements.

**Catalog:** Clicking on this icon will catalog the whole email – message and attachment/s as one record.

**Catalog attachment(s) only**: This is the preferred option for cataloguing emails with attachments.

  - Use this icon to catalogue attachments separately from the email. Each attachment will be registered in TRIM and fully searchable.

- You will be prompted to select from the available Electronic Record Types. Select the appropriate one i.e. **CHANCELLERY DOCUMENT**
- The New Record CHANCELLERY DOCUMENT Entry Form will display. Complete the details as required. A new Record CHANCELLERY DOCUMENT Entry Form will appear for each attachment.

 **Catalog message only**: You may select to catalog an email only (with no attachment/s) by clicking on this icon.

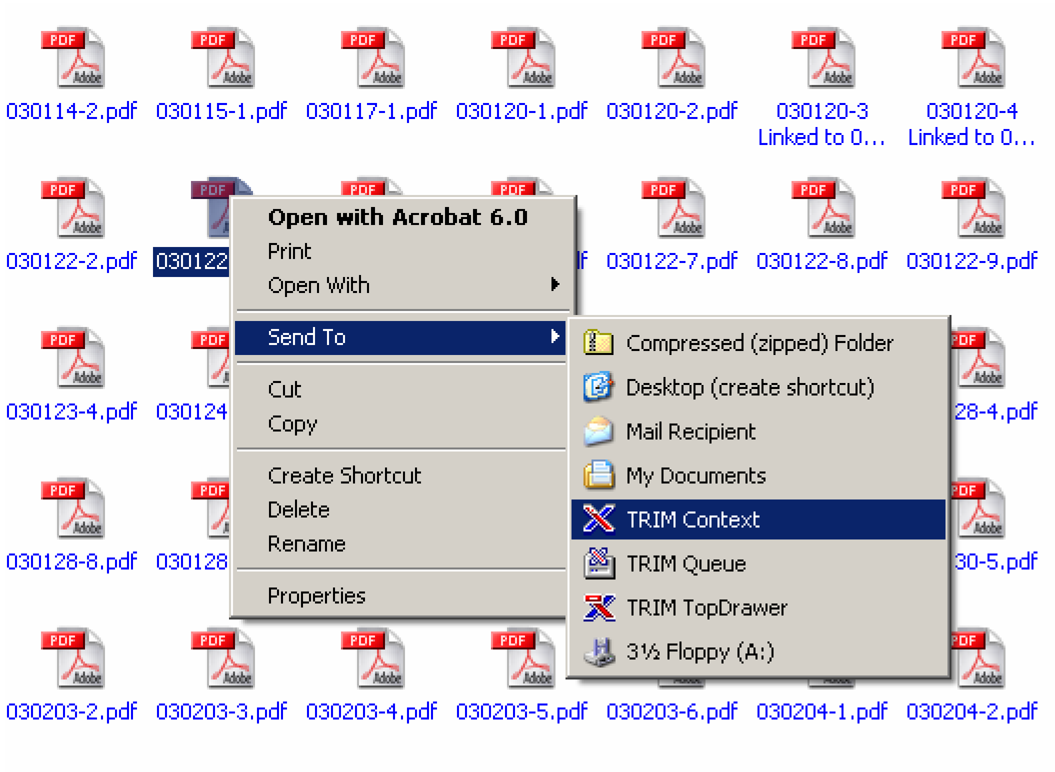
Cataloging Email Attachments

It is advisable to catalog e-mail attachments separately from the message. Otherwise you will not be able to search for the attachment as it will be embedded within the cataloged e-mail. Do this by selecting the Attachments Only option.

Creating New Agreements

After saving the scanned agreement as a PDF, capture the agreement into TRIM from your directory using the **Windows** → **Send To** function.

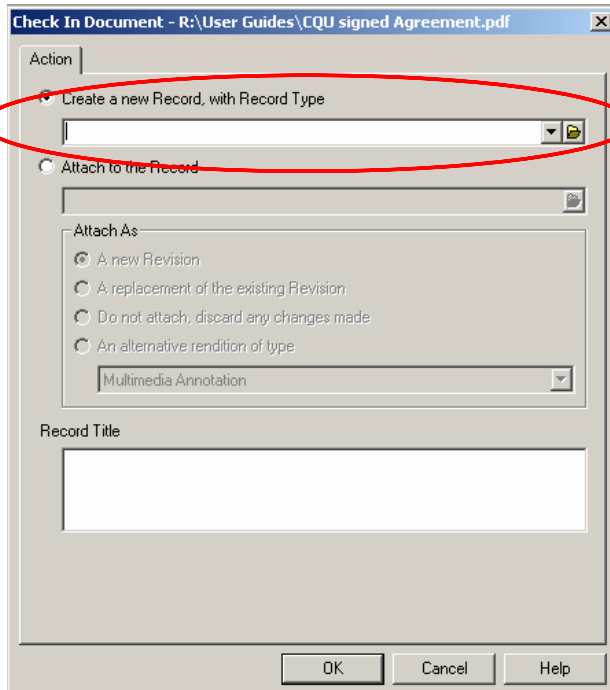
1. Open My Computer/ Windows Explorer to the directory which contains the document you wish to TRIM.
2. Highlight the agreement in your directory and right click. Select **Send To** → **TRIM Context.**



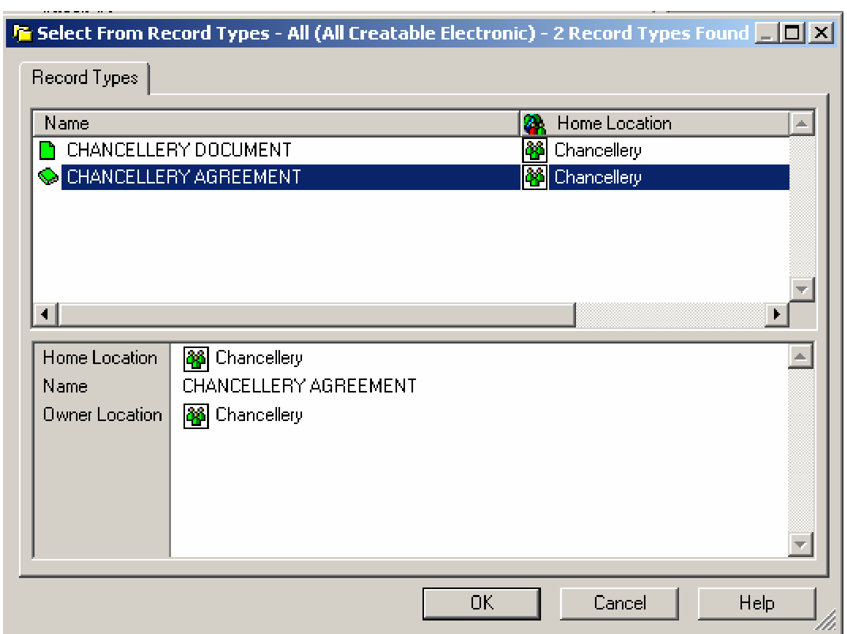
Scanned Documents

When capturing a scanned document, make sure that it has been converted to PDF format (*.pdf). PDF's occupy less space than *.tif or other scanning formats.

3. TRIM will automatically open when you right-click and **Send To** TRIM Context. Make sure you have accessed the right dataset. (see Changing Datasets)
4. The **Check In Document** Dialog Box will display



5. **Select Create a new Record with Record Type**. This is the default option and will already be highlighted.
    - The record type options will be displayed by clicking the KwikSelect. **Select CHANCELLERY AGREEMENT**



6. Click OK to return to the Check in Document dialog box.
7. Enter a meaningful title for your record. The titling protocols for Agreements are outlined in the CQU Record Management and TRIM Data Entry Standards.

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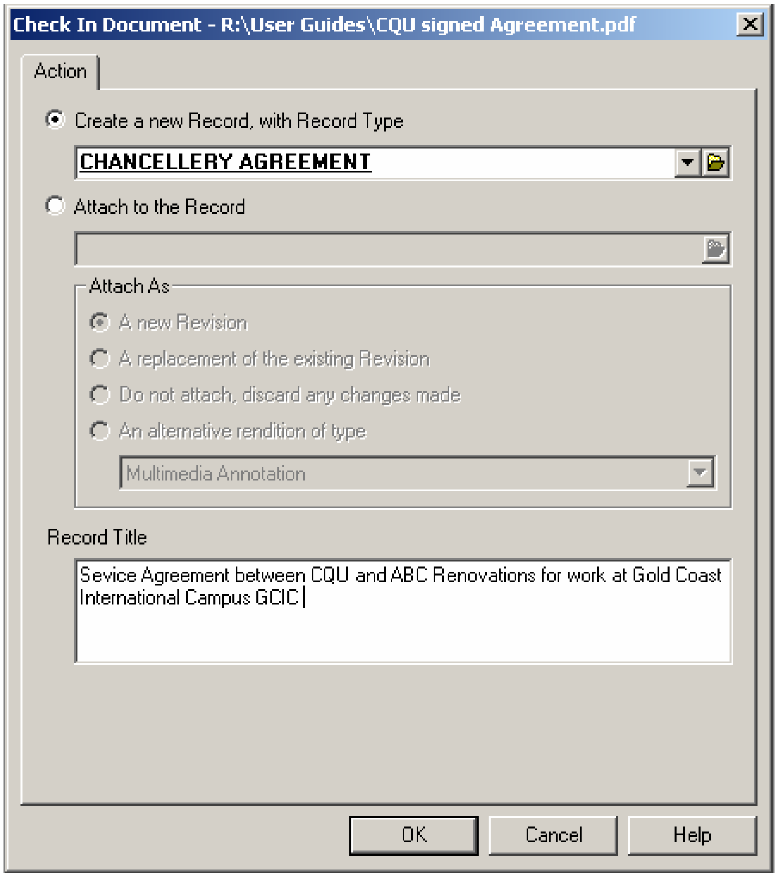
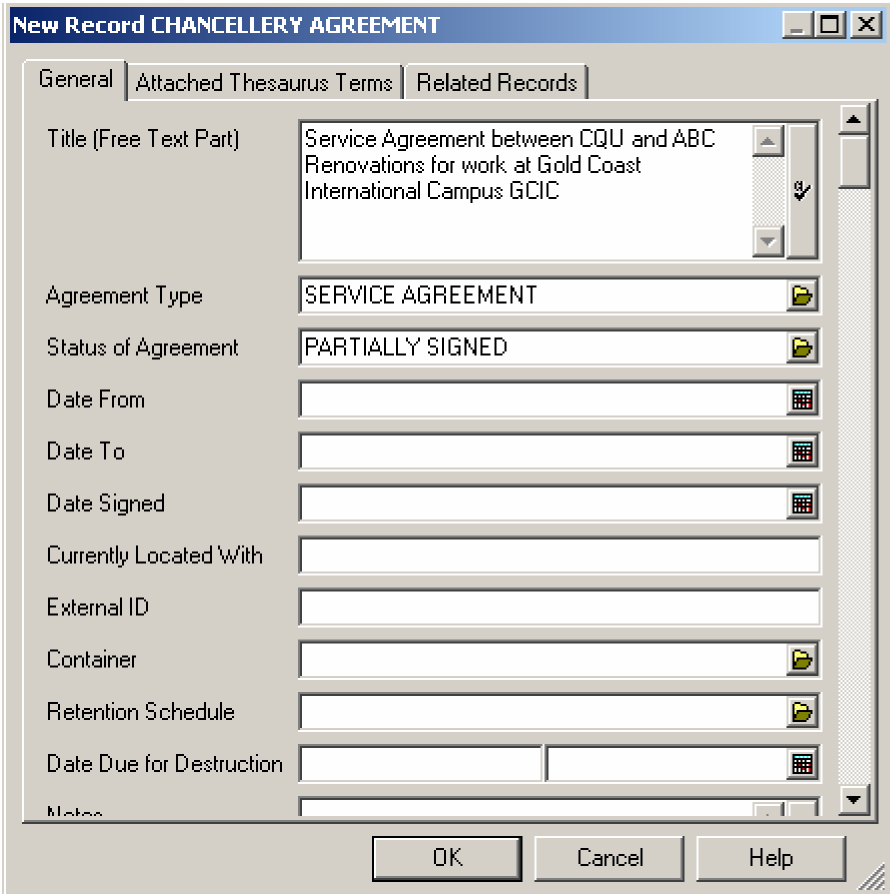
Agreement titles must include:

- **Parties of the agreement** (e.g. CQU and ABC Renovations)
- **Purpose of the Agreement** (e.g. work executed at Gold Coast International Campus GCIC)

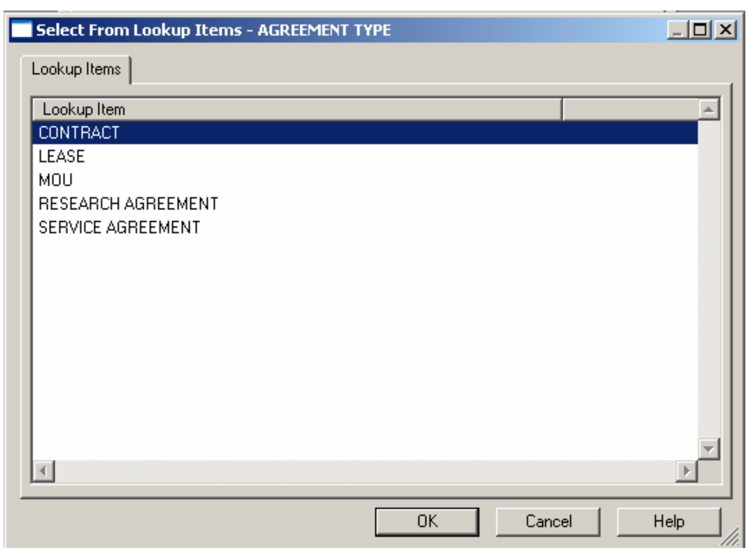


8. When a meaningful title has been entered click OK.

- A New Record CHANCELLERY AGREEMENT dialog box will appear.



9. **Title:** The title you entered in the previous screen will carry over. This can be changed or edited in this screen if necessary.
10. **Agreement Type**: This field must be completed. Click the KwikSelect to view and select from the Agreement types available.



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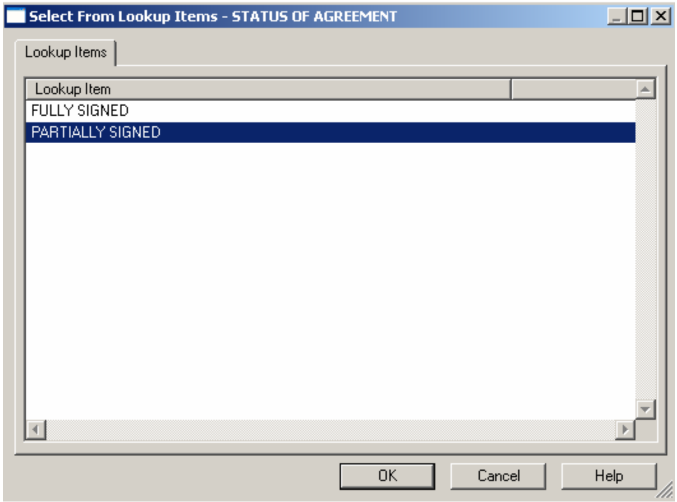
11. Status of Agreement: This field must be completed. Use the KwikSelect to select the appropriate status of the agreement attached to the TRIM record i.e. partially or fully signed. This field must be updated if a new revision of the agreement is attached to the record.



12. Dates: The CHANCELLERY AGREEMENT Entry Form has fields that allow you to enter

- **Date From**: Date the agreement commences
- **Date To**: The date the agreement finishes
- **Date Signed**: This is the date it was signed by a CQU representative

13. Currently Located With: This field is used to track the current location of the original hard copy of the agreement.

- TRIM will default this field to your position. If you do not have possession of the original CQU copy of the Agreement, delete the defaulted position and use the KwikSelect to choose the appropriate replacement location. The replacement must be a position and not a personal name.
- Each time the original hard copy is moved to a different location, the 'Currently Located With' field of the TRIM record must be updated to reflect this.

14. External ID: If there is an external reference number on the Agreement you can enter this in the External ID field.

15. Container: Use this field to enclose the record into an existing folder

- Click the KwikSelect on the **Container** field. This allows you to search for the folder (see Searching in TRIM) OR
- Use the drop down arrow which saves the recent history of folders you have accessed.

- Select the correct folder and the record will be automatically enclosed in the folder when created.
- If you need to make a new folder for this record, leave the Container field blank. You can create a new folder after this record has been saved. (see Creating New Folders.)

16. The **Notes** field allows you to enter additional details or information regarding the Agreement. This is usually information that is important but does not fit into any of the other fields available.

17. When all applicable fields are completed click **OK**.

- The Agreement has now been captured and TRIM will display the record.
- Write the TRIM record number (eg AGREE/04/9999) on the top right hand side of the CQU hard copy of the Agreement for future reference.

Updating Agreements

The Revisions function in TRIM is used to capture both the CQU-signed version of an agreement and the finalized agreement signed by all parties.

The fields in the properties of the TRIM Record must reflect the current revision of the agreement

Creating New Revisions

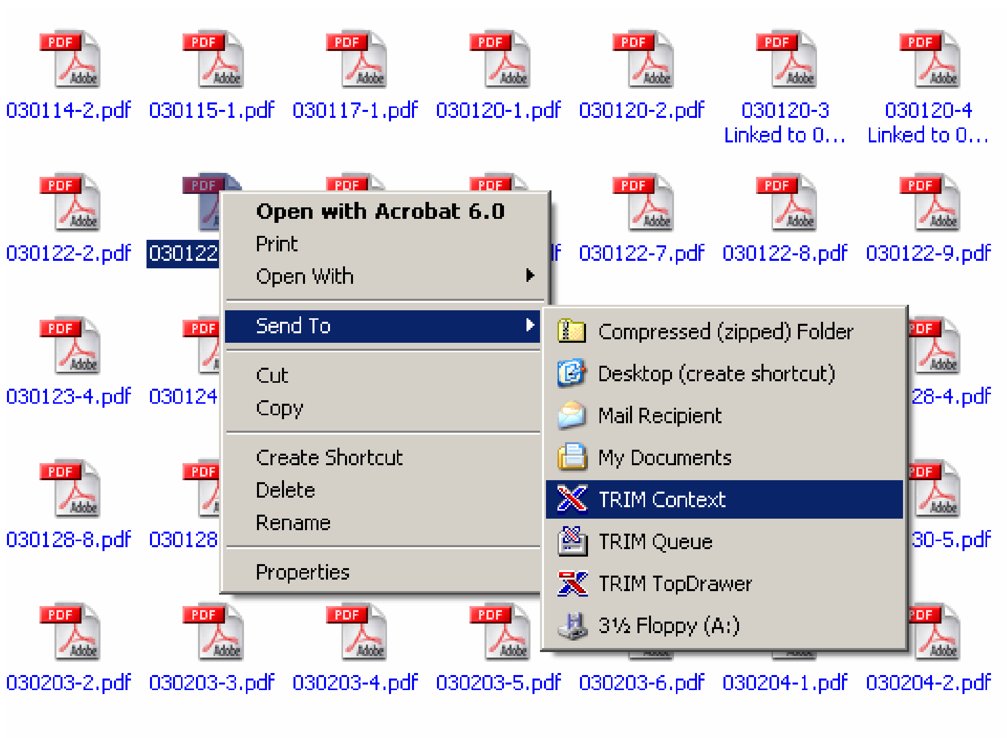
TRIM Context allows us to attach multiple revisions of an electronic document to a single TRIM record. Attaching a new document to an existing TRIM Record is done using the Windows-Send To function.

What is a Revision?

A Revision is basically a modified copy of the document. It is most widely used when capturing Agreements in TRIM.

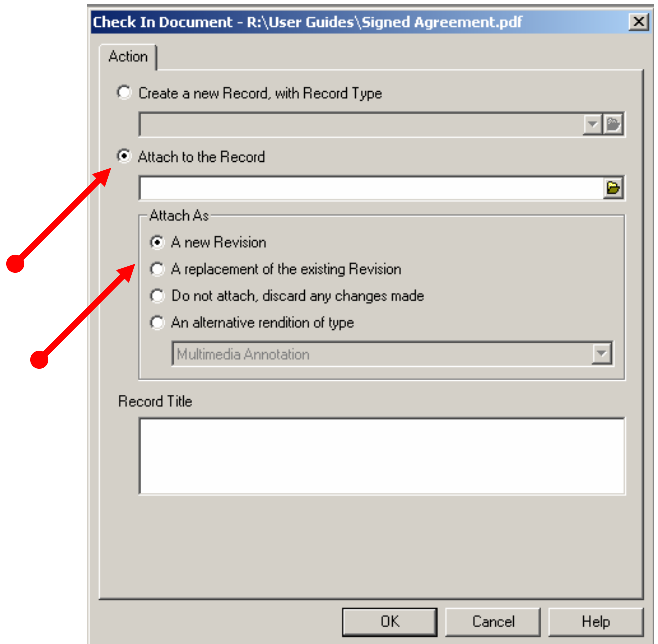
The most recent revision of the document will display when the TRIM record is opened however past revisions are easily accessible.

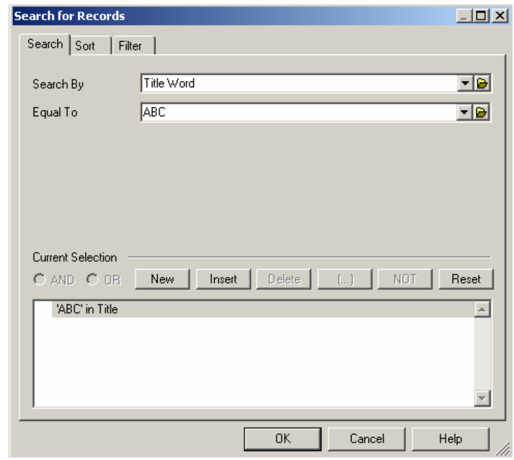
1. Open My Computer/ Windows Explorer to the directory which contains the scanned document (in this case a fully signed agreement) you wish to capture in TRIM.
2. Highlight the agreement in your directory and right click. Select **Send To** → **TRIM Context.**



3. TRIM will automatically open when you right click and **Send To** TRIM Context. Make sure you have accessed the right dataset. (see Changing Datasets)

4. The **Check In Document** Dialog Box will display.





5. Select **Attach to the Record** which will activate the attachment section of the dialog box.
6. Enter the TRIM record Number or click the KwikSelect at the end of the **Attach to the Record** field to search for the TRIM record you wish to attach the new document to as a new revision.
7. Highlight the appropriate record in the search results and click OK to display the TRIM record number into the field.
8. The title of the TRIM record will display in the **Record Title** field. Make sure the record you have selected is correct and change your selection if necessary.
9. **Attach As:** Ensure **A new Revision** is selected.
10. **Click OK.** The document is now attached as a new revision to the TRIM record selected. (in this example AGREE/05/6)

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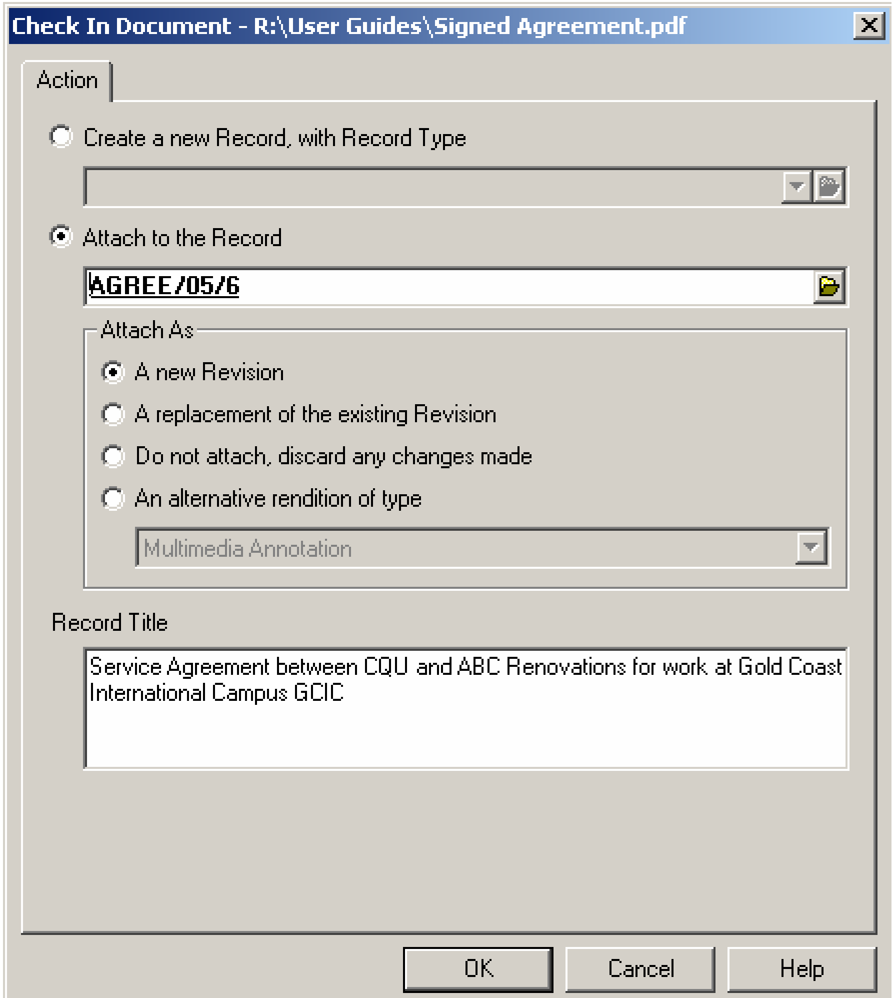

Now the TRIM Record has a new Revision attached

- The latest Revision is attached to the record and will be the document displayed when you double click on the TRIM Record.
- The properties of the TRIM Record must be updated to reflect the status of the current Revision. Right-click on the highlighted record and select **Properties** to display the TRIM Record Properties Dialog Box. Amend any fields that require updating.
- In the case of Agreements, the Status of Agreement field must only be changed to FULLY SIGNED when the final copy of the Agreement with the signatures of all parties is captured into TRIM.
- The previous revisions of a document are displayed in the Revisions tab of the Record Properties. To view these revisions highlight the record. Right-click – **Properties**. The TRIM Record Properties dialog box will display.

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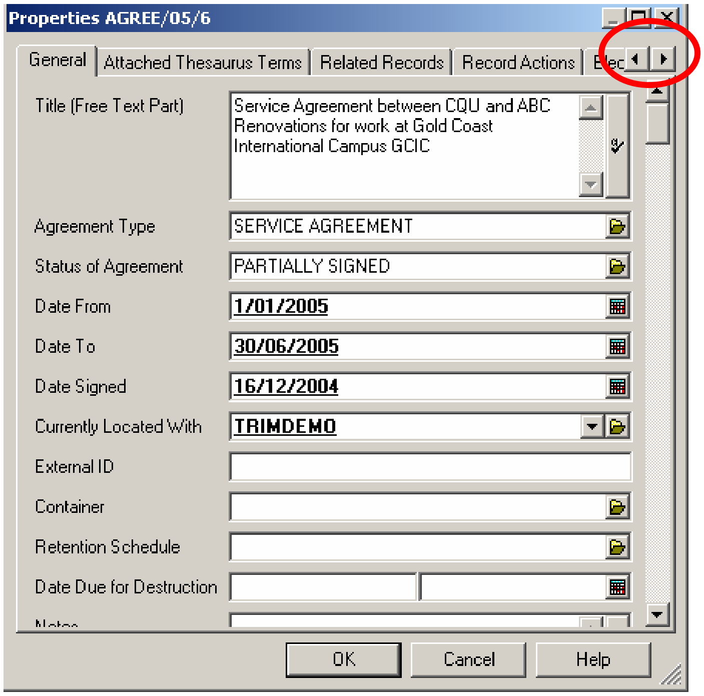
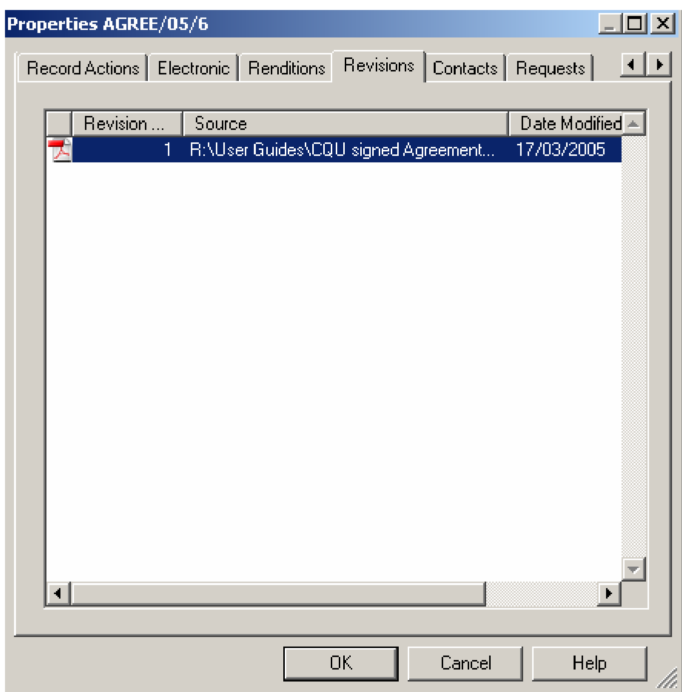


- Use the arrows to move through the tabs at the top of the dialog box to reach the **Revisions** tab. Double-click on the preferred revision to view its properties or the document itself.



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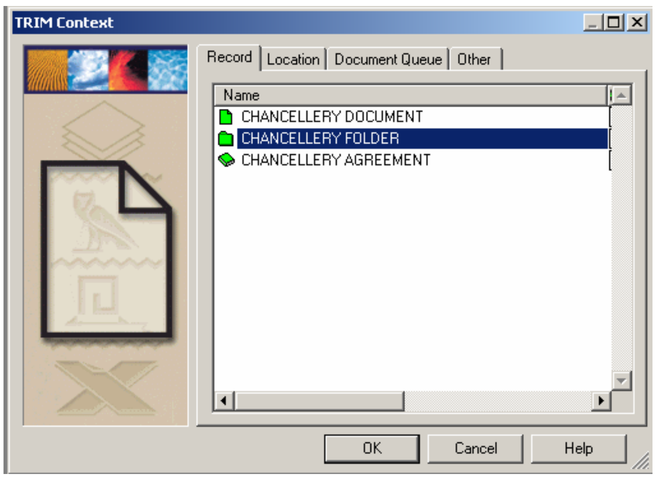
Creating New Folders

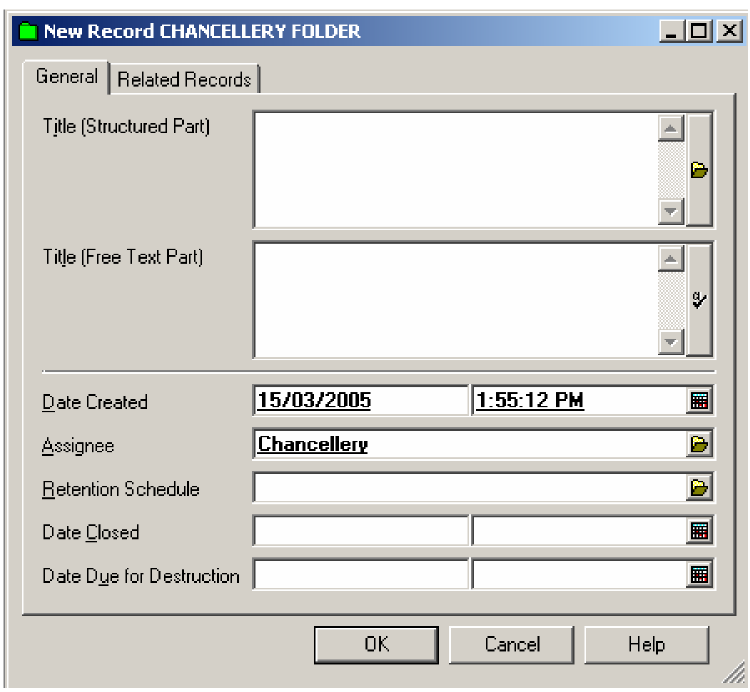
You are able to create a folder to contain records which have common subject matter. A folder is usually created if you have more than two records relating to the same subject.

To Create a Folder:

1. Click on the **File** menu and choose **New,** keyboard shortcut CTRL+N or click on the New Record Icon on the Toolbar to open a New Record Screen
2. Select **CHANCELLERY FOLDER**



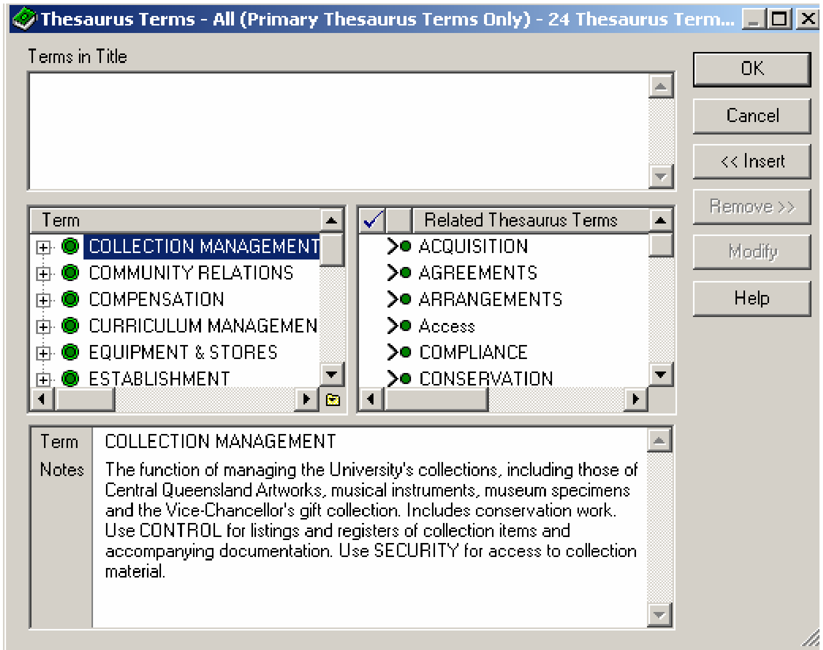
3. The New Record CHANCELLERY FOLDER dialog Box will open



Using Thesaurus Terms

4. Title (Structured Part)

- The Title (Structured Part) Field in the New Record CHANCELLERY FOLDER requires you to select from a controlled set of terms called **Thesaurus Terms** to name the folder. Click the KwikSelect to display the available **Thesaurus Terms** dialog box.



- The Thesaurus Terms dialog box consists of four sections:
  - **Terms in Title** - Displays all the terms that you have selected for your title. This field will be empty when first opening the Thesaurus.
  - **Term** - The field on the left-hand side displays the terms available for titling
  - **Related Thesaurus Terms** – This list shows you the related terms of the highlighted term on the left
  - **View Pane - Notes** - Displays details for the highlighted term.

Thesaurus Terms

The Thesaurus is controlled set of terms used to represent and describe the various subjects and/or activities of CQU in TRIM**.** A thesaurus controls the vocabulary used for titling and indexing records, making our records more consistent and easier to find.

- **When naming your folder you must select one of the Top Terms (from the left) and one of the related terms listed on the right**.
  - There is a scope note for each term. Use these notes to help you discover the terms which best describe the contents of your folder.

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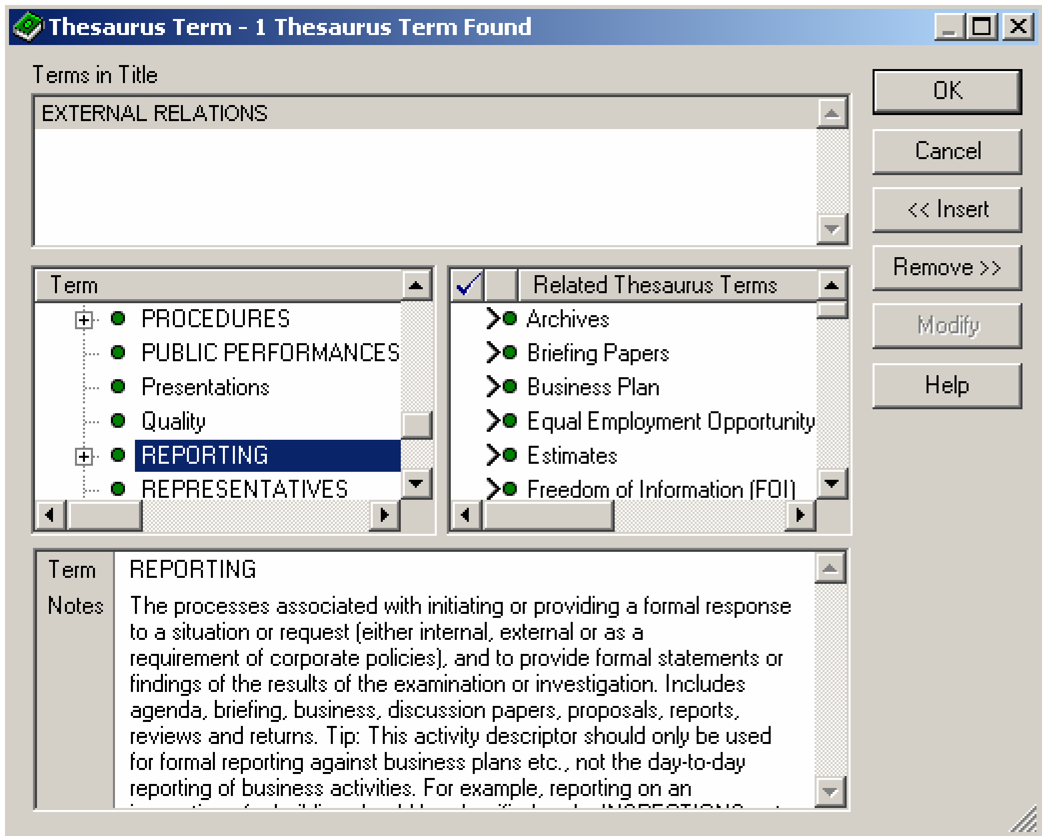
- There are several ways of viewing the scope notes of a Thesaurus term.
  - Highlight the selected top term, right click and select Notes.
  - **Customized View Pane** -- The notes for each Top Term will display in the View Pane at the bottom of the dialog box. If these notes are not displaying customize this view pane by right-clicking **Customize** and adding **Notes** to the Active Fields.
  - To see the notes for related terms you need to view them in the left window by using the ⊞ plus sign next to the top term to show the related terms beneath. Highlight your chosen related term and read the notes by right clicking Notes or in the View Pane

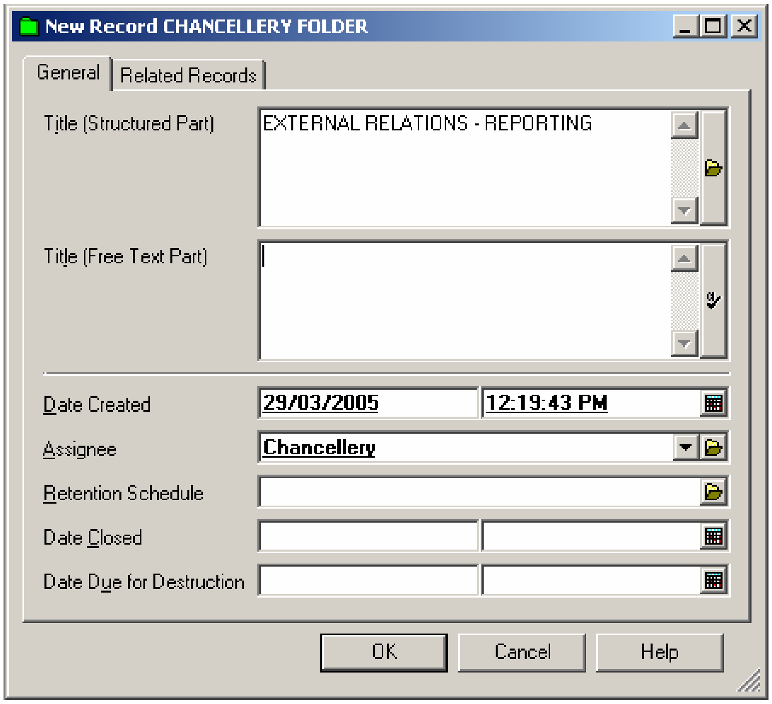
EXTERNAL RELATIONS is the Top Term we have selected. Now choose a Related Term that best describes our folder

REPORTING is the Related Term. Click the + sign to show Related Terms beneath the Top Term **EXTERNAL RELATIONS**

These notes describe the term **REPORTING.** To see these notes you need to expand the top term on the left to show it's Related Terms beneath

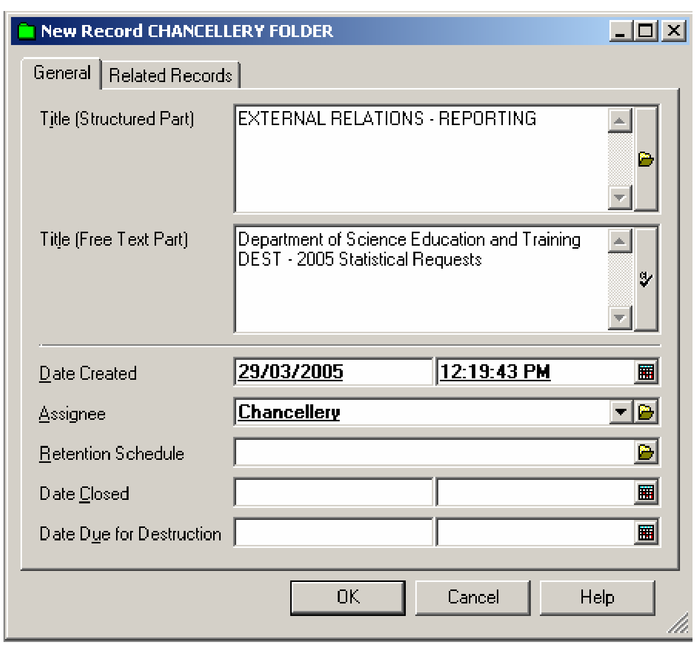


- Once you have decided the most suitable terms for naming your folder insert the term into the title, either by double-clicking on the highlighted term or click **<< Insert**.
- Use **Remove >>** if you make an error.
- When you have selected all appropriate terms click OK. The Thesaurus Terms will be inserted into the Title (Structured Part) field of the new Record Folder dialog box.



5. Title (Free Text Part)

Enter an appropriate free text title into the **Title (Free Text Part)** Field. This free text will best describe the contents of the folder.



6. Click OK.

- A Chancellery Folder has now been created.

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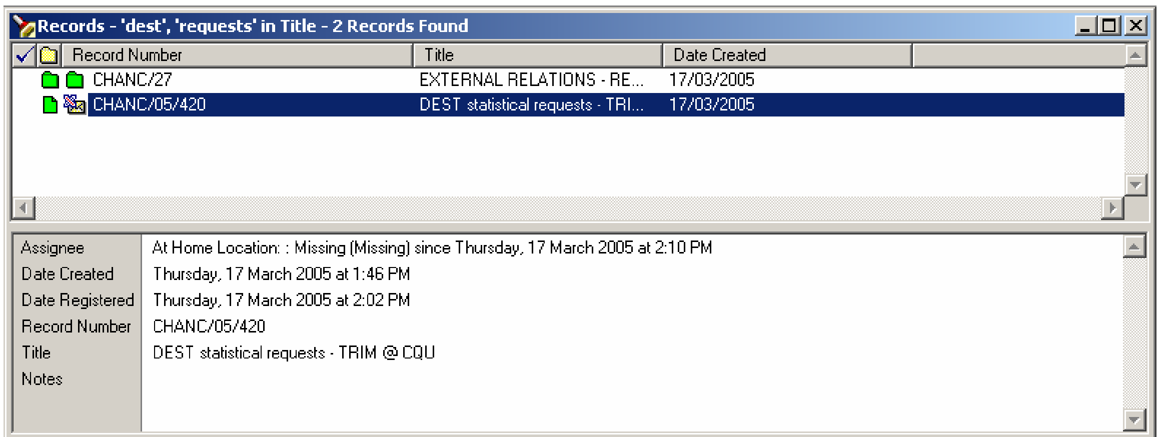
Enclosing Records in a Folder (Container)

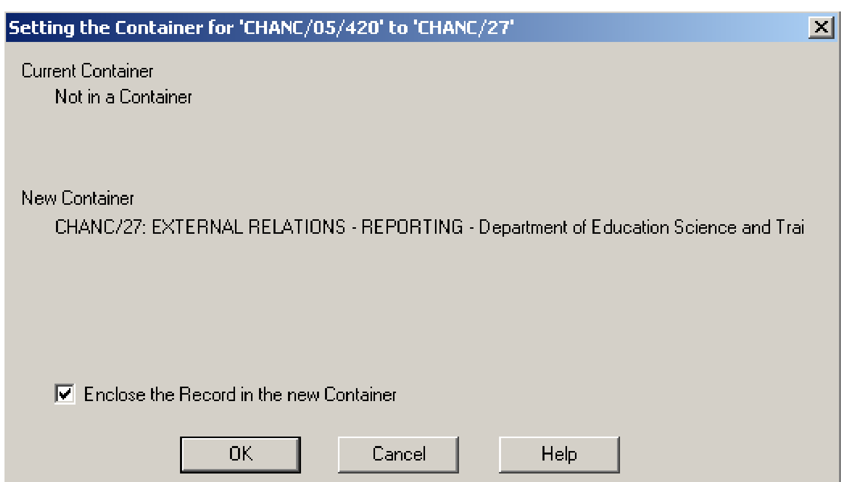
- Folders are designed to hold documents on the same subject together. In TRIM there are 2 Methods available when enclosing a TRIM record in a Folder.

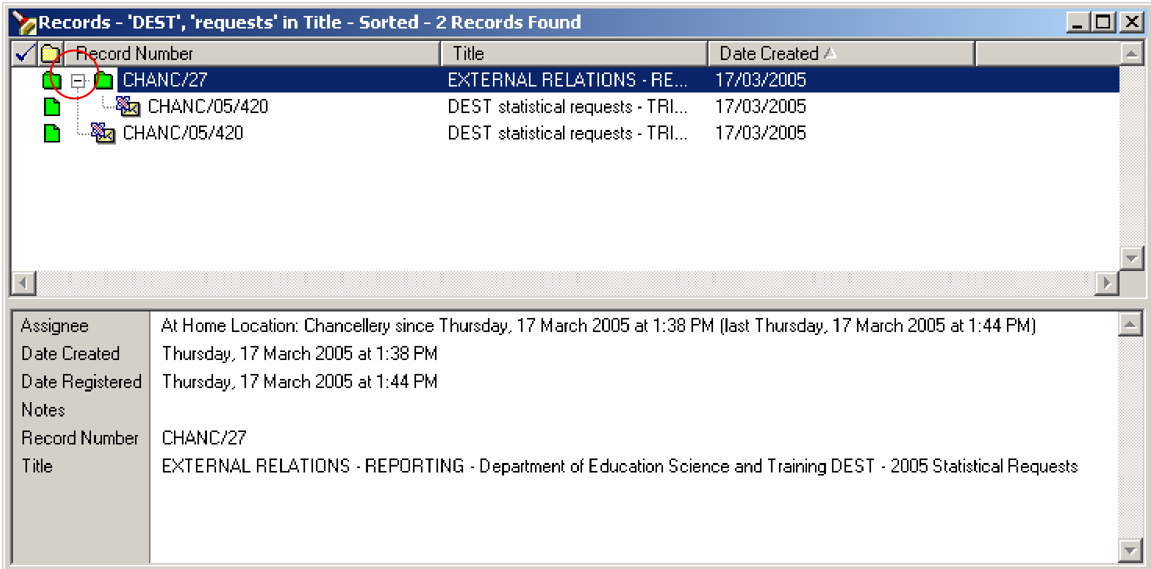
Method 1. Drop and Drag

1. Search for your records (see Searching For Records)
2. In the List pane of your search results, drag and drop the record into the appropriate folder: in this example record CHANC/05/420 into folder CHANC/27



3. You will be asked to confirm this move.
4. Tick **Enclose the Record in the New Container** where prompted and Click **OK.**

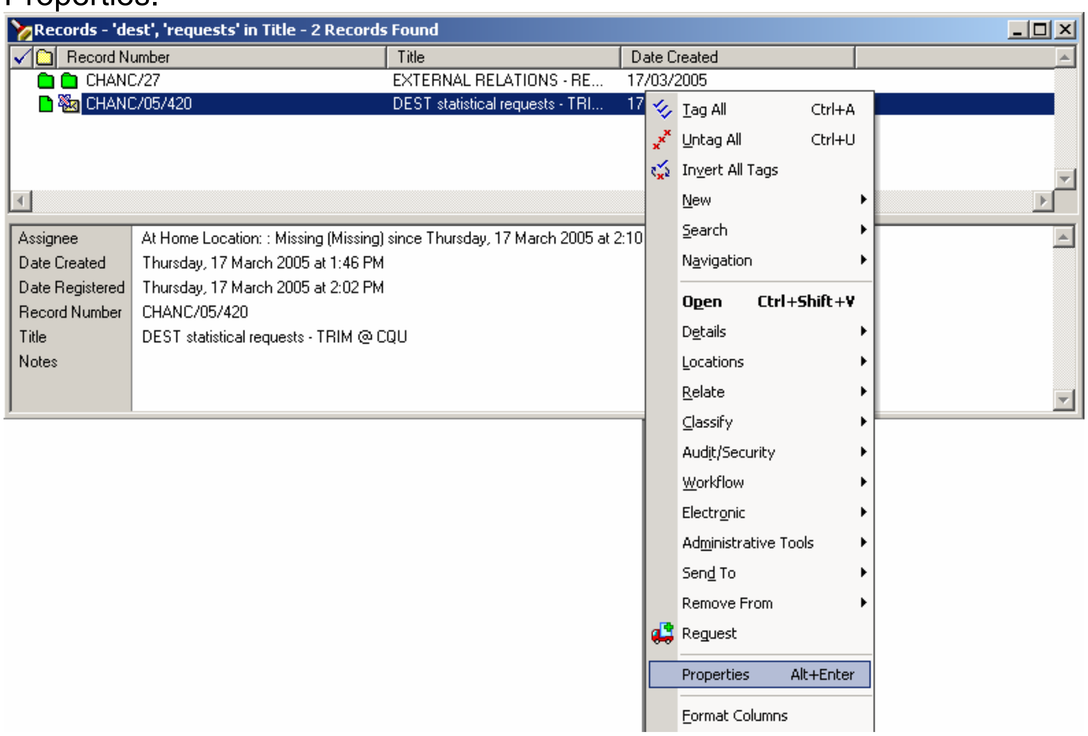




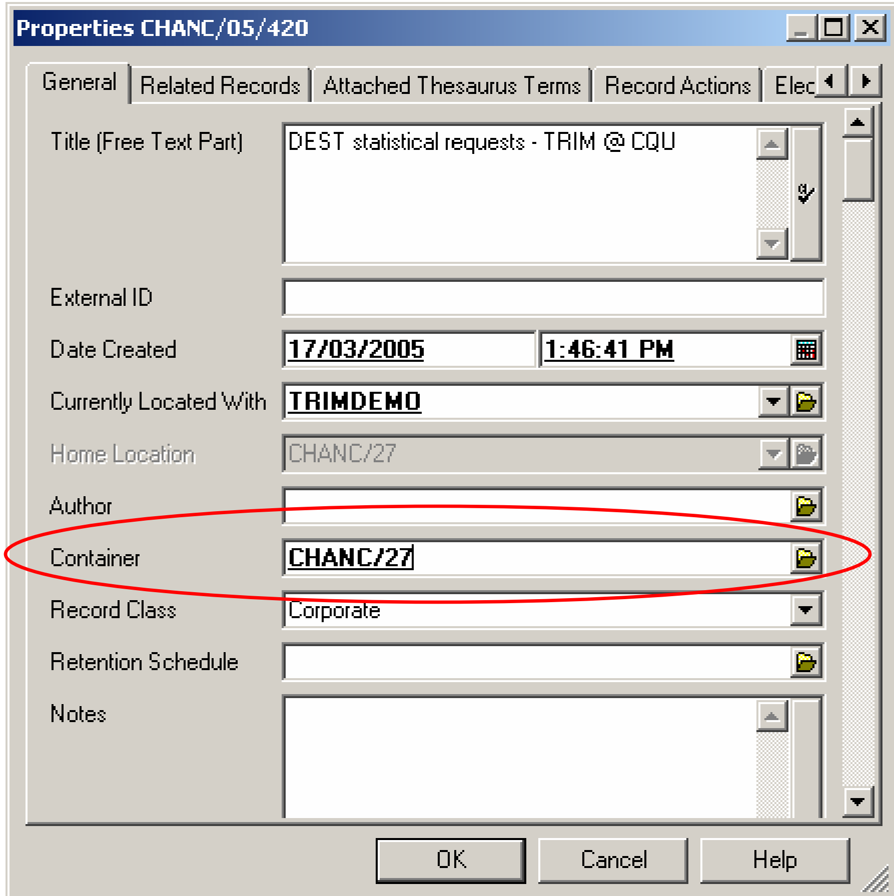
- The record CHANC/05/420 is now enclosed in the container (folder) CHANC/27. Since there now is a record in the folder you can click on the plus sign ⊞ to expand the folder and display the records enclosed in it. (in this case CHANC/05/420)

Method 2. Record Properties

1. Search for the desired record. Highlight the record and right click. Select Properties.



2. A Dialog box showing the properties of the record will display.



3. Enter the desired folder in the container field by

   a) Typing in the container number (this must be exact and the correct format i.e. CHANC/27)

   b) Using the KwikSelect in the Container field to search for the desired folder

   OR

   c) Use the drop-down arrow which saves the folders you have previously accessed.

QUICK TIP

If you know that you will be capturing several records on the same subject, create a folder before you begin capturing your documents. You can then enclose each record into it's container as you create it. See Creating New Chancellery Records

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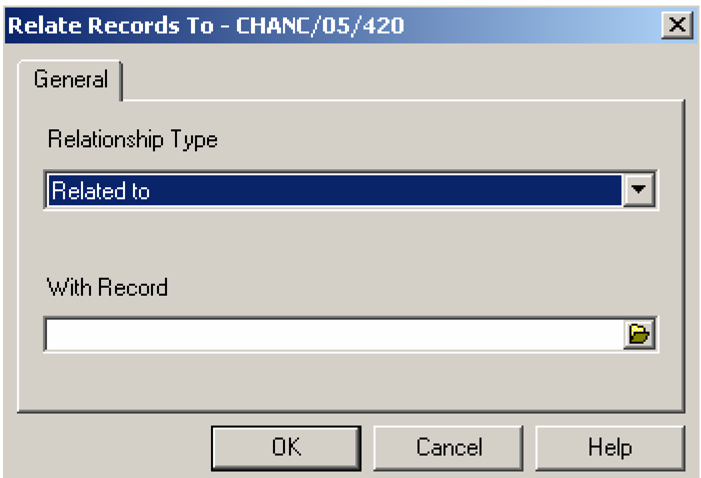
Relating Records

Relating Records

TRIM allows you to relate records. This is useful for linking records which are associated by either subject matter or content. Relating records can assist other users with future inquiries in finding the information they need.

1. Search for the Record you wish to relate (see Searching in TRIM)
2. Highlight the record, right-click and select **Relate – Relate**.
3. The **Relate Records To** dialog box will display.



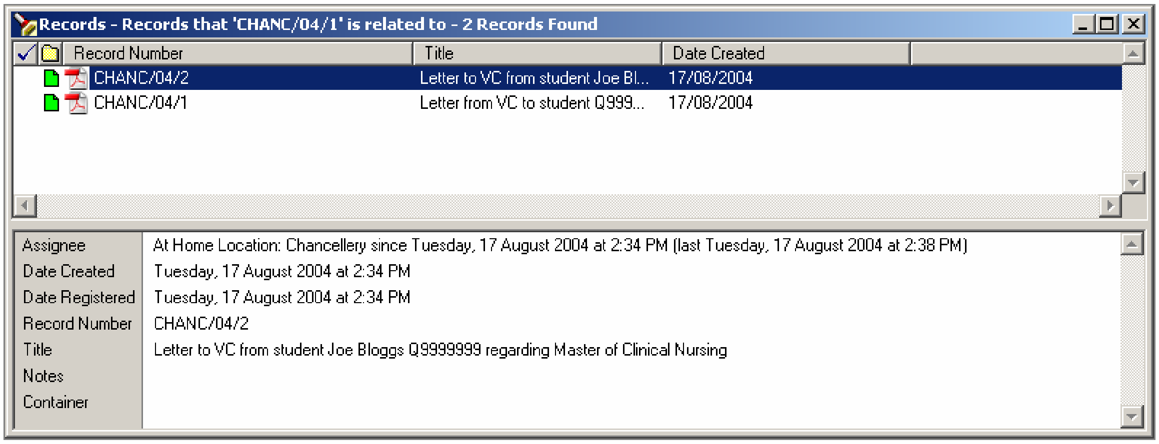
4. **Relationship Type –** use the drop-down arrow to select the type of relationship between the chosen records from a list of Relationship Types**.**
   - **Related to** creates a simple relationship between records.
5. **With Record** – Enter the record which you need to relate the highlighted record to. You can do this by typing the record number if you know it or by using the KwikSelect on the field to search for the record.
6. After entering the record number, click OK.

   The records have now been related.

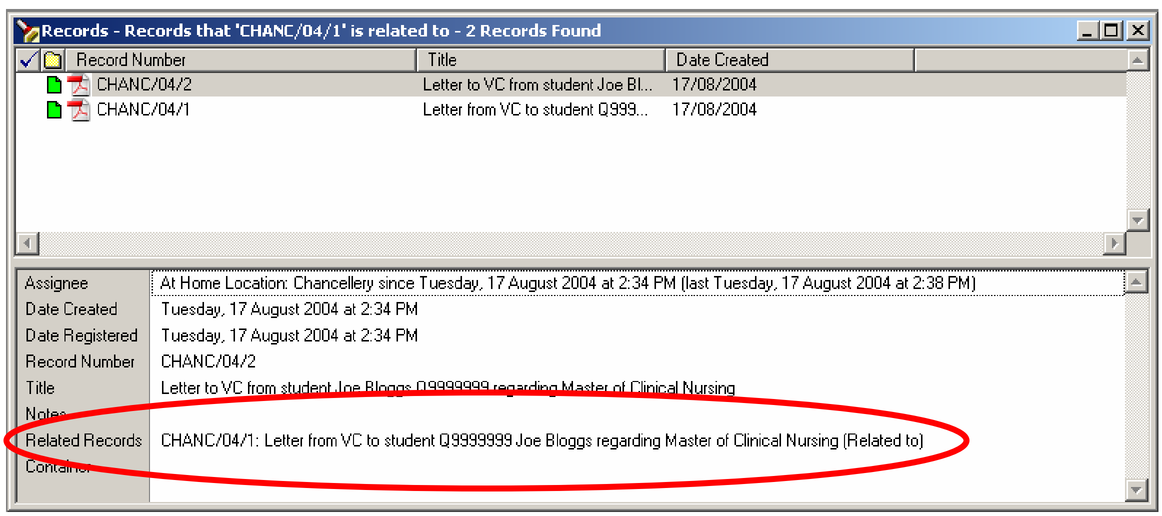
More than 2 Related Records = Folder
If more than 2 records are related, it is more effective to create a folder to contain them. See Creating New Chancellery Folders

Viewing Related Records

- To view all related records, highlight the record and right-click. Select **Navigation - Related Records**. This will show all records which have been related to the original record. To view these double-click.



- You can also customize the view pane of your search window to display Related Records.
- Right-click in the view pane, select **Customize** and add Related Records to the Active Fields list. (For more information on customising the way TRIM displays your results see Understanding TRIM Results)



QUICK TIP

- **Customising the View Pane** of the search window to display the TRIM record properties most useful to you is simple to do and helps make working in TRIM easier and more efficient.
- Remember to customise the View Pane for each type of record.

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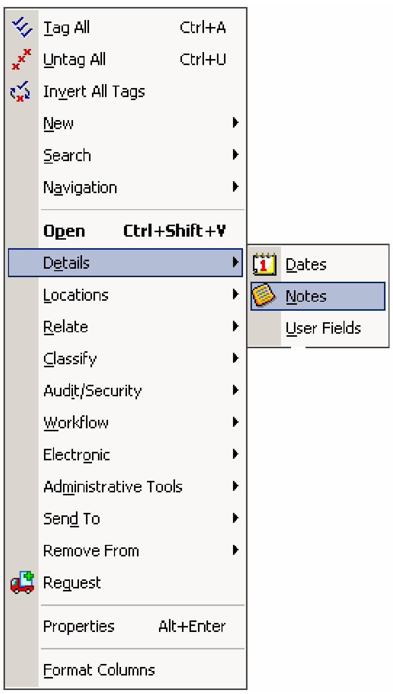
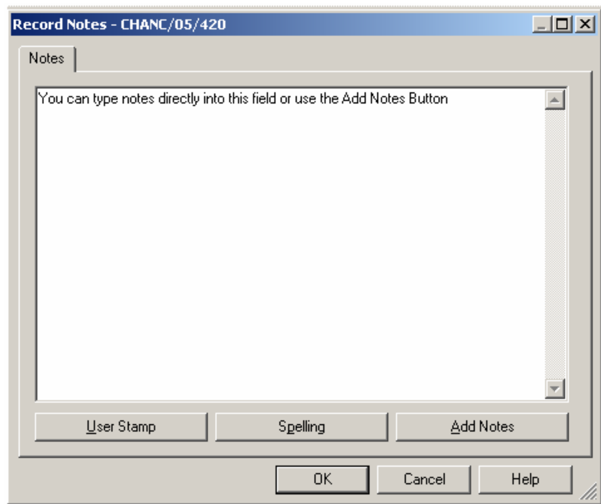
Appending Notes

- Notes are used to inform users of any additional information about the record which has not been recorded elsewhere e.g. forwarded to Registrar for response 23 January 2004.
- The Notes function allows you to append notes to the currently highlighted record. This is especially useful when updating notes on existing TRIM records.
- Right click on the record and select **Details- Notes.**





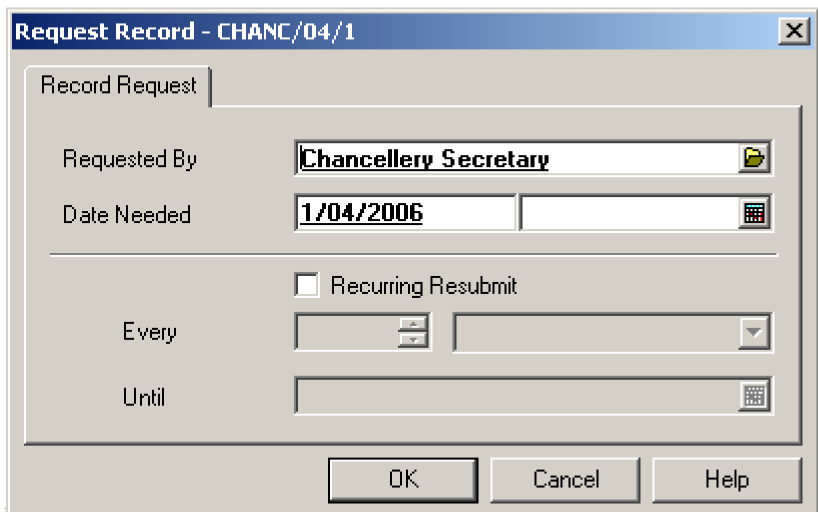
- A new **Record Notes** dialog box will appear. You can type your notes directly into this notes field or use the Add Notes Button.
- The **Add Notes Button** allows you to add the text and nominate if the note will be placed at the start or end of the Notes Edit box. This is useful if you are adding more information to existing notes.
- **User Stamp** – The User Stamp Button will insert the date time and your position or name. It is recommended that the User Stamp is inserted when recording notes or adding to existing notes so users accessing the record know when the notes were created and by whom.
- **Spelling** – the Notes field of a record is indexed and searchable. It is important the spelling is correct. Check that names, titles and any acronyms used are also correct.

Requests and Recurring Resubmits

- The Request function in TRIM allows you to request TRIM records be sent to you – either on a one off basis (request) or on a regularly scheduled basis (recurring resubmit.) This is especially useful for documents that may need review or updating some time in the future.

Placing a Request

1. Search for the record you wish to request. (see Searching in TRIM)
2. Highlight the record, Right click and select Request. 
3. The Request Record Dialog box will display.



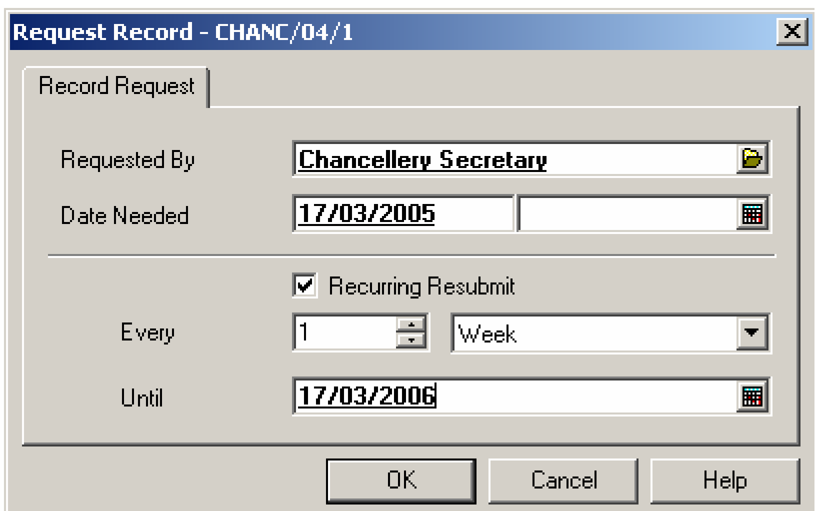
4. **Requested By** – By default your user name will display. Delete the name in the field and use the KwikSelect to select the requester's Location from the Locations list. DO NOT USE personal names – use position titles.
5. **Date Needed** – Type in the date and time you wish the record to be sent to you. You may use the Calendar button at the end of the field to select the date from the calendar.
6. **Click OK**. The record has now been requested. Once a User makes a request, the Records & Archives Office will be responsible for:
    - Searching for Requests and Resubmits on a daily basis
    - Sending a resubmit report to the requesting individual on the selected date detailing the record/s requested.

IMPORTANT
Position titles must be used in TRIM. Do not use the name of the person in the position as future staffing changes may lead to confusion and reduce the effectiveness of searching for particular records, requests or actions.

Recurring Resubmits

Recurring Resubmits are used for records you wish to request on a continuing basis.

1. Search for the record you wish to request.
2. Right-click and select the Request option. The same dialog box as when placing a Request will display.
3. **Requested By** – By default your user name will display. Delete the name in the field and use the KwikSelect to select the requester's Location from the Locations list. DO NOT USE personal names – use position titles.
4. Check the Recurring Resubmit check box. The Resubmit fields will be activated:



Every - Select the period you wish the resubmit to operate (for example: every 2 weeks or every 3 months etc):

- In the first field select the time period (for example: 1, 2, 3 etc)
- In the second field select the period type (for example: Day, Week, Month or Year)

Until – Set the date the Recurring Resubmit will finish. Either type in a date or use the calendar icon to select a date.

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5. Once you have determined the appropriate frequency for the Recurring Resubmit. Click OK. The Records & Archives Office is responsible for

- Searching for Requests and Resubmits on a daily basis
- Sending a Resubmit report to the requesting individual on the selected date/s detailing the record/s requested.

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