**Central Queensland University** 

Records and Archives Office





# **TRIM @ CQU** Chancellery User Guide

CONTENTS	
About TRIM @ CQU Chancellery User Guide	3
Getting Started in TRIM	4
TRIM Help	4
TRIM Navigation	5
Opening TRIM	5
Menu, Toolbar or Keyboard Shortcut – Your Choice!	5
Navigation Shortcuts	6
Changing Datasets	8
Searching in TRIM	10
Word Searches	11
Date Searches	15
Record Number Searches	17
Creating New Records	19
Scanned Documents, Word and Excel	19
Creating New Records from Email	25
Cataloguing Emails from Outlook	25
Emails with Attachments	28
Creating New Agreements	30
Creating New Revisions	36
Creating New Folders	40
Using Thesaurus Terms	41
Enclosing Records in a Folder (Container)	44
Method 1. Drop and Drag	44
Method 2. Record Properties	45
Relating Records	47
Relating Records	47
Appending Notes	49
Requests and Recurring Resubmits	50
Placing a Request	50
Recurring Resubmits	51

# 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 <u>http://www.library.cqu.edu.au/services/libraries/corporate/records-</u> <u>archives/index.htm</u>

# 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/recordsarchives/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 Selection on the TRIM toolbar at the top of your screen.



# **TRIM Navigation**

# **Opening TRIM**



 To Open TRIM Context, double-click the TRIM Icon memory on your Desktop or Start – Programs – TRIM Context – TRIM

		CRT 4.0						
	•	New Office Document						
	<b>B</b>	Open Office Document						
	88	PaperPort						
	<b>6</b>	Programs		1	Accessories	٠	1	
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	*	Favorites	۲		Microsoft Excel		26	TRIM Queue
	Law St.	B		w	Microsoft Word		×	TRIM TopDrawer
	63	Documents	1		Microsoft FrontPage		8	TRIM User Guide
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.ē	-			1	Microsoft Office Tools	×		
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mobu	2	Log Off loakesb						
Ŵ	0	Shut Down		Į.				
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# 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.



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

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Page 5 of 52 R:\User Guides\Updated Chancellery User Guide.doc Last Updated: 4/18/2005



- 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.



- 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.
  - o Click once ascending order
  - Click again (click twice)- descending order
- Clicking on the Record Type Column Header i 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.



• The Open TRIM Context Dataset box will now appear.

Open TRIM Context Dataset
Dataset Name
X Chancellor
🔀 Library
X Production
🔀 Sandbox
T
Open default Dataset next time you run TRIM     Befresh
Running the Workgroup Server on lobot
OK Cancel Advanced Default Help

• 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

<mark>∭</mark> TRIM	1 Cont	ext					
Eile E	Edit S	earch <u>T</u> ools <u>W</u> indow	<u>H</u> elp				
	B	🔀 Eind Records	Ctrl+F	🔏 🧏 🍃 🔄 🗸 🛛 🗞 🗞 🔍	See See Any Word	💌 🕞 luser guide	• 🖻 🗣 🐂 🖕
	_	<u>S</u> aved Searches	Ctrl+G			,	
		<u>C</u> urrent Search	•				
		Navigation	•				
		<u>I</u> RIM Trays	•				

• 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.

Find Records		
Search Sort Filte		
Search By Equal To	Title Word	
Current Selection — O AND O OR	New Insert Delete () NOT	Reset
" in Title		×
	OK Cancel	Help



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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.

Search Methods	
Search Methods	
 <ul> <li>Word Searches</li> <li>Title Word</li> <li>Notes Word</li> <li>Any Word</li> <li>Thesaurus Term</li> <li>Classification Word</li> <li>Schedule Word</li> <li>Schedule Word</li> <li>Schedule Word</li> <li>Tray</li> <li>Tray</li> <li>Numbers</li> <li>Dates</li> <li>User Defined Fields</li> <li>Archiving</li> <li>Locations</li> <li>Action Tracking</li> <li>Miscellaneous</li> </ul>	
OK Cancel H	elp //

**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.

Find Records		<u>_ D ×</u>
Search Sort Filte	r ]	
<u>S</u> earch By	Title Word	- 🖻
Equal <u>T</u> o	graduation	▼ 📔
Current Selection -	New Insert Dejete () <u>N</u> OT	Reset
'graduation' in Ti	le	×
	OK Cancel	Help

- **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.

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📘 🖬 🖉 🗟 😂 🥔 🗢 🚦 🍃 🤔 🍃 💁 🖕 📏 🗞 🖄 🐜 🖌	grad" 👻 📄
	academic student graduate graduation



## 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.

Search Methods	
Search Methods	
🕀 🛅 Word Searches	
🗄 🛅 Navigate	
🕀 🛅 Tray	
🕀 🧰 Numbers	
Date Registered	
Date Created	
Date Closed	
Date Published	
Date Modified	
V Date Finalized	
Due for Return On	
Record Requests By Date	
Date Due	
Sector V Last Action Date	
	<b>_</b>
OK Cancel H	elp

## 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.

Find Records Search Sort Filt Search By Date From	er Date Registered 24/03/2004							[		
Date To Current Selection - C AND C OR Date Registered	24/03/2005           New         Insert           Jis between '24/03/200-	Mon 28 7 14 21 28 4	Tue 1 8 15 22 29 5 <b>Tod</b>	Mar 2 9 16 23 30 6 <b>ay: 2</b>	ch 200 Thu 3 10 17 31 7 <b>4/03/</b> 3	D5 Fri 4 11 18 25 1 8 <b>2005</b>	Sat 5 12 26 2 9	▼ ■ Sun 6 13 20 27 3 10	/	QUICK TIP Clicking on the drop-down arrow gives you a number of preset choices eg Next 14 days, Next 7 days etc
		OK		0 С	K ancel		Car	ncel   		

- 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.



	$\frown$
Record Number	
Don't forget - using the black drop-down an	row at the end of search
fields will show the most recent searches.	These saved searches
may save you time if you are repeating a re	cently performed search.

## Using the Search Menu

You can also use the Search Menu – Find Records, **CTRL+F** or **b** 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**.

#### TRIM @ CQU Searching in TRIM



**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.

# **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.
- Highlight the relevant document in your directory and right-click your mouse. Select Send To → TRIM Context.



 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.

Attach	to the Record			
				<u> </u>
Attacl	n As			
	replacement of th	e existina Bev	vision	
O D	o not attach, discr	ard any chang	es made	
C Ar	n alternative rendi	ition of type		
N	fultimedia Annota	tion		 ~
cora na	e			

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 .

۹C	Select From Re	cord Types - All (All Creatal	ele Electronic)	- 2 Record Types Fo	ound _ 🗆 🗙
	Record Types				1
	Name		2	Home Location	<u> </u>
	CHANCELLER	RY DOCUMENT	<u>**</u>	Chancellery	
	S CHANCELLE	RYAGREEMENT	44	Chancellery	
	•				
	Home Location	🎇 Chancellery			<u> </u>
	Name	CHANCELLERY DOCUMENT			
	Owner Location				
					-
_					
			OK	Cancel	Help
					///.

Page 20 of 52 R:\User Guides\Updated Chancellery User Guide.doc Last Updated: 4/18/2005

- 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.

Create a new Record, with Record Type     CHANCELLERY DOCUMENT	
C Attach to the Record	• A meaningful title
Attach As A new Revision A replacement of the existing Revision Do not attach, discard any changes made An alternative rendition of type Multimedia Annotation Record Title This is where you need to enter a meaningful title for the record	<ul> <li>records can be found and retrieved efficiently - now and in the future.</li> <li>The CQU Records Management Guidelines and TRIM Data Entry Standards must be followed when titling TRIM records and folders.</li> </ul>

 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.

New Record CHANCELLE	RY DOCUMENT		<u>_ 🗆 ×</u>		
General Contacts Re	lated Records Attached T	hesaurus Terms			
Title (Free Text Part)	This is where you need to enter a meaningful title for the record				
External ID					
Date Created	15/03/2005	<u>12:05:12 PM</u>			
Currently Located With	TRIMDEMO				
Home Location	Chancellery 🕑				
Author	TRIMDEMO				
Container					
Record Class	Corporate		•		
Retention Schedule					
Notes	The notes field allows you information about the reco	to enter additiona rd			
	ОК	Cancel	Help //.		

- **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.

• 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**

91

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 end 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: <u>records@cqu.edu.au</u>

# 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.

💽 Inbox - Mici	rosoft Outlook				
Eile Edit y	/jew Fav <u>o</u> rites <u>T</u> ools	Actions Help		Type a questio	n for help 🛛 👻
1 🕂 🕅 🦉	TRIM • 📮 😭 New	-   🎒 📴 🗙   💱 <u>R</u> eply	🕵 Reply to All 🖋 Forward 📑 Send/Receive 🗟 Find 💝	Type a contact to find	• 🤋 🗸
🖨 Back 🖒	🄄 Inbox				A <u>d</u> dress
Outlook Shor	Folder List X	! 🗅 🕅 🕼 From	Subject	Received $ abla$	Size 🔺
	🖃 🥨 Outlook Today - [M	🚊 🛛 Library - Rec	Meaningful email subject lines help make TRIM record entry faster	Tue 15/03/2005 12:34 PM	1 KB
- CA	🚽 🧑 Calendar	📄 🛛 🖉 Library - Rec	TRIM@CQU User Guide - Comments by Monday Please	Tue 15/03/2005 12:09 PM	35 KB
	👘 Contacts	📄 🛛 🖉 Library - Rec	Please respond to draft policy by Friday	Tue 8/03/2005 1:34 PM	6 KB
Outlook	🛛 🎯 Deleted Items	📄 Library - Rec	TRIM@CQU User Guide	Tue 8/03/2005 1:30 PM	2 KB
Today	💖 Drafts				
	🗄 🥋 Inbox				
	Journal				
Inbox	Notes				
INDOX	Outbox				

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



- If your email has no attachments the Catalog icon will be the only icon active on your TRIM toolbar.
   Imm . 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.

🔁 Select From Re	cord Types - All (All Creatal	ole Electronic) -	2 Record Types F	ound _ 🗆 🗙
Record Types				
Name		<b>2</b>	Home Location	
CHANCELLE	RYAGREEMENT		Chancellery	
				-
•				
Home Location	CHANCELLERY DOCUMENT			
Owner Location	CHANCELLENT DOCOMENT			
		ОК	Cancel	Help

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.

Microsof	t Outlook			×
⚠	A program is trying to stored in Outlook. Do	access e-mail ado you want to allo	dresses you have w this?	
	If this is unexpected, i choose "No".	t may be a virus	and you should	
	Allow access for	1 minute	~	
	Yes	No	Help	

- 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)

N	lew Record CHANCELLE	RY DOCUMENT			IX
	General Contacts Rel	ated Records Attached T	Thesaurus Terms		
	Title (Free Text Part)	Meaningful email subject li record entry faster and mo	* *		
	External ID				
	Date Created	15/03/2005	12:34:23 PM		
	Currently Located With	TRIMDEMO		6	
	Home Location	Chancellery		D	
	Author			D	
	Container			6	
	Record Class	Corporate		•	
	Retention Schedule			6	
	Notes			*	•
		ОК	Cancel	Help	

- 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**  $\rightarrow$  **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  $\rightarrow$  TRIM Context.

030114-2.pdr	030115-1.pdr	030117-1.pdr	030120-1.pdr	030120-2.pdr	Linked to 0	030120-4 Linked to 0	ī
030122-2.pdf	030122	een with Acro nt en With	∎2058 <b>\</b> bat 6.0 ∳	030122-7.pdf	030122-8.pdf	030122-9.pdf	(
030123-4.pdf	030124 Co	nd To t Py	<u> </u>	Compressed Desktop (cre Mail Recipien	(zipped) Folder ate shortcut) t	20F 28-4.pdf	1
030128-8.pdf	030128	eate Shortcut lete name operties	( 2 	My Documen TRIM Contex TRIM Queue	ts ct	30-5.pdf	(
030203-2.pdf	030203-3.pdf	030203-4.pdf	030203-5.pdf	31/2 Floppy (, 030203-6.pdf	A:) 030204-1.pdf	030204-2.pdf	(



## 🖾 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.

- 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

O Att	ach to the Record
	Litach As
(	A new Revision
(	A replacement of the existing Revision
(	🖱 Do not attach, discard any changes made
(	An alternative rendition of type
	Multimedia Annotation
Hecor	d litle

- 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**

🔁 Select From Re	cord Types - All (All Creatab	e Electronic)	- 2 Record Types F	ound 💶 🗙
Record Types				
Name		2	Home Location	
CHANCELLE	RY DOCUMENT		Chancellery	
S CHANCELLE	RY AGREEMENT		Chancellery	
Home Location	🙀 Chancellery			
Name	CHANCELLERY AGREEMENT			
Owner Location	🙀 Chancellery			
1				
		OK	Cancel	
				пер

- 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.

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)

eck In Document - R:\User Guides\LQU signed Agreement.pdf	ļ
Action	
Create a new Record, with Record Type	
CHANCELLERY AGREEMENT	- 🖻
C Attach to the Record	
Attach As	
C A new Revision	
C A replacement of the existing Revision	
C Do not attach, discard any changes made	
C An alternative rendition of type	
Multimedia Annotation	~
Record Title	10 1
Sevice Agreement between LUU and ABU Renovations for work at Goli International Campus GCIC	d Coast

- 8. When a meaningful title has been entered click OK.
  - A New Record CHANCELLERY AGREEMENT dialog box will appear.

New Record CHANCELLER	YAGREEMENT	<u>- 🗆 ×</u>
General Attached Thesa	urus Terms Related Records	
Title (Free Text Part)	Service Agreement between CQU and ABC Renovations for work at Gold Coast International Campus GCIC	*
Agreement Type	SERVICE AGREEMENT	
Status of Agreement	PARTIALLY SIGNED	6
Date From		
Date To		
Date Signed		
Currently Located With		
External ID		
Container		
Retention Schedule		
Date Due for Destruction		
Motos		
	OK Cancel	Help //

- **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.

C	Select From Lookup Items - AGREEMENT TYPE	
	Lookup Items	
		<u> </u>
	CONTRACT	
	LEASE	
	MOU	
	RESEARCH AGREEMENT	
	SERVICE AGREEMENT	
	4	
	OK Cancel	Help
		///.

**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.

Select From Lookup Items - STATUS OF AGREEMENT		<u>_     ×</u>
Lookup Items		
Lookup Item		A
FULLY SIGNED PARTIALLY SIGNED		
4		
	Cancel	Help

- **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 CQUsigned 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  $\rightarrow$  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.

Check In Document - R:\User Guides\Signed Agreement.pdf	
Action	
C Create a new Record, with Record Type	
Attach to the Record	
Attach As	Search I Cat.   Cat.
A new Revision	Search   Sort   Filter
C A replacement of the existing Revision	Search By Title Word
O Do not attach, discard any changes made	Equal To ABC
Record Title	
	Current Selection
	C AND C OR New Insert Delete [] NOT Reset
	'ABC' in Title
	V
OK Cancel Help	OK Cancel Help

- 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.
- 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)

Check In Document - R:\User Guides\Signed Agreement.pdf
Action
Create a new Record, with Record Type
Attach to the Record
AGREE/05/6
Attach As
• A new Revision
C A replacement of the existing Revision
O Do not attach, discard any changes made
O An alternative rendition of type
Multimedia Annotation
Record Title
Service Agreement between CQU and ABC Renovations for work at Gold Coast International Campus GCIC
OK Cancel Help

## 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. Rightclick – Properties. The TRIM Record Properties dialog box will display.

Pro	perties AGREE/05,	/6
G	ieneral Attached Th	esaurus Terms   Related Records   Record Actions   Bec 💶 🕨
I	Title (Free Text Part)	Service Agreement between CQU and ABC Renovations for work at Gold Coast International Campus GCIC
ŀ	Agreement Type	SERVICE AGREEMENT
9	Status of Agreement	PARTIALLY SIGNED
[	Date From	1/01/2005
[	Date To	30/06/2005
[	Date Signed	<u>16/12/2004</u>
(	Currently Located Wit	h TRIMDEMO
E	External ID	
(	Container	
F	Retention Schedule	
[	Date Due for Destruct	ion 🔳
	Viatas	
		OK Cancel Help

• 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.

Properties AGREE/0	5/6			-	
Record Actions Ele	ctronic Renditions	Revisions	Contacts	Requests	
				-	[
Revision	Source			Date Modifie	:d 📥
1	R:\User Guides\CG	(U signed Ag	preement	17/03/2005	
					-
				1	
			Cancel	Help	

# **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 in the Toolbar to open a New Record Screen
- 2. Select CHANCELLERY FOLDER



3. The New Record CHANCELLERY FOLDER dialog Box will open

New Record CHANCELL	ERY FOLDER		
General Related Records	1		
Title (Structured Part)			
Title (Free Text Part)			* \$
Date Created	15/03/2005	1:55:12 PM	
<u>A</u> ssignee	Chancellery		6
<u>R</u> etention Schedule			6
Date <u>C</u> losed			
Date D <u>u</u> e for Destruction		·	
	ОК	Cancel H	

Page 40 of 52 R:\User Guides\Updated Chancellery User Guide.doc Last Updated: 4/18/2005

# **Using Thesaurus Terms**

- 4. Title (Structured Part)



- 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.

- 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.



**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.

New Record CHANCELL	ERY FOLDER					
General Related Records						
Title (Structured Part)	EXTERNAL RELATIONS	- REPORTING				
Title (Free Text Part)			*			
Date Created	29/03/2005	12:19:43 PM				
Assignee	Chancellery		- 🖻			
<u>R</u> etention Schedule						
Date <u>C</u> losed						
Date D <u>u</u> e for Destruction						
	ОК	Cancel H				

## 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.

New Record CHANCELI	ERY FOLDER		<u>- 🗆 ×</u>		
General Related Records					
Title (Structured Part)	EXTERNAL RELATIONS	REPORTING			
Title (Free Text Part)	Department of Science Ed DEST - 2005 Statistical Re	ucation and Training equests	*		
Date Created	29/03/2005	12:19:43 PM			
<u>A</u> ssignee	Chancellery		-		
<u>R</u> etention Schedule					
Date <u>C</u> losed					
Date D <u>u</u> e for Destruction					
	OK	Cancel H	elp		

- 6. Click OK.
  - A Chancellery Folder has now been created.

# **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

Records - 'dest', 'requests' in Title - 2 Records Found				
Record Nu	umber	Title	Date Created	<b>A</b>
💼 🛅 CHANG	0/27	EXTERNAL RELATIONS - RE	17/03/2005	
🗋 🧞 CHANO	0/05/420	DEST statistical requests - TRI	17/03/2005	
				~
<b></b>				Þ
Assignee	At Home Location: : Missing (Missing)	since Thursday, 17 March 2005 at 2	2:10 PM	A
Date Created	Thursday, 17 March 2005 at 1:46 PM			
Date Registered	Thursday, 17 March 2005 at 2:02 PM			
Record Number	CHANC/05/420			
Title	DEST statistical requests - TRIM @ C	QU		
Notes				
				_
				× .

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

Setting the Container for 'CHANC/05/420' to 'CHANC/27'	×
Current Container Not in a Container	
New Container CHANC/27: EXTERNAL RELATIONS - REPORTING - Department of Education Science and Trai	
Enclose the Record in the new Container	
OK Cancel Help	

≽ 🗞 🕹 🖓 🗞 🗞	ST', 'requests' in Title - Sorted -	2 Records Found		
Record N	umber	Title	Date Created 🛆	<b>▲</b>
🚺 🕀 🔁 СН/	ANC/27	EXTERNAL RELATIONS - RE	17/03/2005	
- C - Sa -	CHANC/05/420	DEST statistical requests - TRI	17/03/2005	
📘 🗋 🔤 СН/	ANC/05/420	DEST statistical requests - TRI	17/03/2005	
-				×
Assignee	At Home Location: Chancellery since	Thursday, 17 March 2005 at 1:38 Pt	d (last Thursday, 17 March 2005 at 1	l:44 PM) 📃
Date Created	Thursday, 17 March 2005 at 1:38 PM	I		
Date Registered	Thursday, 17 March 2005 at 1:44 PM	1		
Notes				
Record Number	CHANC/27			
Title	EXTERNAL RELATIONS - REPORT	ING - Department of Education Scier	nce and Training DEST - 2005 Statis	tical Requests
1				

# **Method 2. Record Properties**

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

≽ Records - 'de	est', 'requests' in Title - 2 Records	5 Found					
Record N	umber	Title	D	ate C	reated		A
CHANC	0/27	EXTERNAL RELATIONS - RE	17	/03/	2005		
🗋 🚵 CHANG	C/05/420	DEST statistical requests - TRI	17	14	<u>T</u> ag All	Ctrl+A	
				×××	<u>U</u> ntag All	Ctrl+U	
				್ಷ	In <u>v</u> ert All Tags		
4					New	•	F
Assignee	At Home Location: : Missing (Missing)	since Thursday, 17 March 2005 at 2	2:10	1	<u>S</u> earch	•	
Date Created	Thursday, 17 March 2005 at 1:46 PM				N <u>a</u> vigation	•	
Date Registered	Thursday, 17 March 2005 at 2:02 PM				Open Ctrl+S	hift + V	
Record Number	CHANC/05/420	2011			Details	•	
Notes	DEST statistical requests - Thim @ C	90			Locations	•	
					Relate	•	
1			_		– Classify	•	
					- · Audit/Security	•	
					Workflow	•	
					Electr <u>o</u> nic	•	
					Administrative Tool	s 🕨	
					Sen <u>d</u> To	•	
					Remove From	•	
				43	Reguest		
					Properties Alt	+Enter	
					Format Columns		
					Country Coldmins		

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

P	Properties CHANC/05/4	20 📃 🕽 🕹	4
	General Related Recor	ds 🛛 Attached Thesaurus Terms 🗍 Record Actions 🗍 Elec 💶 🕨	J
	Title (Free Text Part)	DEST statistical requests - TRIM @ CQU	
	External ID		
	Date Created	17/03/2005 1:46:41 PM 🖩	
	Currently Located With	TRIMDEMO	
	Home Location	CHANC/27	
	Author	P P	
<	Container	CHANC/27	
	Record Class	Corporate 🗸	
	Retention Schedule	<b>≥</b>	
	Notes		
		OK Cancel Help	

- 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

# **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.

Relate Records To - CHANC/05/420	×
General	
Relationship Type	
Related to	
With Record	
OK Cancel	Help

- 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.

≽ Records - Re	Records - Records that 'CHANC/04/1' is related to - 2 Records Found					
Record Number		Title	Date Created	<b></b>		
📄 🔂 CHANG	0/04/2	Letter to VC from student Joe Bl	17/08/2004			
📘 🔁 🔂 CHANG	C/04/1	Letter from VC to student Q999	17/08/2004			
				<b>V</b>		
<u> </u>				Þ		
Assignee	At Home Location: Chancellery since	Tuesday, 17 August 2004 at 2:34 Pt	M (last Tuesday, 17 August 2004 at 2	2:38 PM)		
Date Created	Tuesday, 17 August 2004 at 2:34 PM					
Date Registered Tuesday, 17 August 2004 at 2:34 PM						
Record Number CHANC/04/2						
Title	Letter to VC from student Joe Bloggs (	29999999 regarding Master of Clinic	al Nursing			
Notes						
Container				_		
				<b>~</b>		

- 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 )

Records - Records that 'CHANC/04/1' is related to - 2 Records Found				
Record Nu	umber	Title	Date Created	<b>A</b>
🗋 📩 CHANC	/04/2	Letter to VC from student Joe Bl	17/08/2004	
🗋 🔁 CHANC	/04/1	Letter from VC to student Q999	17/08/2004	
				_
4				× 
Assignee	At Home Location: Chancellery since	Tuesday, 17 August 2004 at 2:34 P	M (last Tuesday, 17 August 2004 at	2:38 PM)
Date Created	Tuesday, 17 August 2004 at 2:34 PM	1		
Date Registered	Tuesday, 17 August 2004 at 2:34 PM	1		
Record Number	CHANC/04/2			
Title	Letter to VC from student Joe Bloggs	09999999 regarding Master of Clinic	al Nursing	
Notes				
Related Records	CHANC/04/1: Letter from VC to stud	ent Q99999999 Joe Bloggs regarding	Master of Clinical Nursing (Related to	0)
Container				
				-



#### 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.

# **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.**

14	Tag All Ctrl+	-A			
×××	Untag All Ctrl+	-U			
₹\$	In <u>v</u> ert All Tags				
	New	►			
	<u>S</u> earch	►			
	N <u>a</u> vigation	►			
	Open Ctrl+Shift+	-v		Record Notes - CHANC/05/420	
	D <u>e</u> tails	Þ	Dates	Notes	1
	Locations	•	Notes	You can type notes directly into this field or use the Add Notes Button	<u> </u>
	<u>R</u> elate	×	User Fields		
	⊆lassify	×			
	Audit/Security	►			
	<u>W</u> orkflow	►			
	Electr <u>o</u> nic	►			
	Administrative Tools	►			
	Sen <u>d</u> To	×			
	Remove From	•			
43	Reguest				
	Properties Alt+Ent	er		User Stamp Spelling Add Notes	
	Eormat Columns			OK Cancel H	elp //

- 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.

Request Record - CHA	NC/04/1	×
Record Request		
Requested By	Chancellery Secretary	<u> </u>
Date Needed	1/04/2006	
	-	
	Recurring Resubmit	
Every		~
Lintil		
Shar	,	
	OK Cancel	Help

- 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:

Request Record - CHA	NC/04/1	X
Record Request		
Requested By Date Needed	Chancellery Secretary	
E very Until	<ul> <li>✓ Recurring Resubmit</li> <li>1 → Week</li> <li>17/03/2006</li> </ul>	<b>•</b>
	OK Cancel	Help

**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.

- **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.