



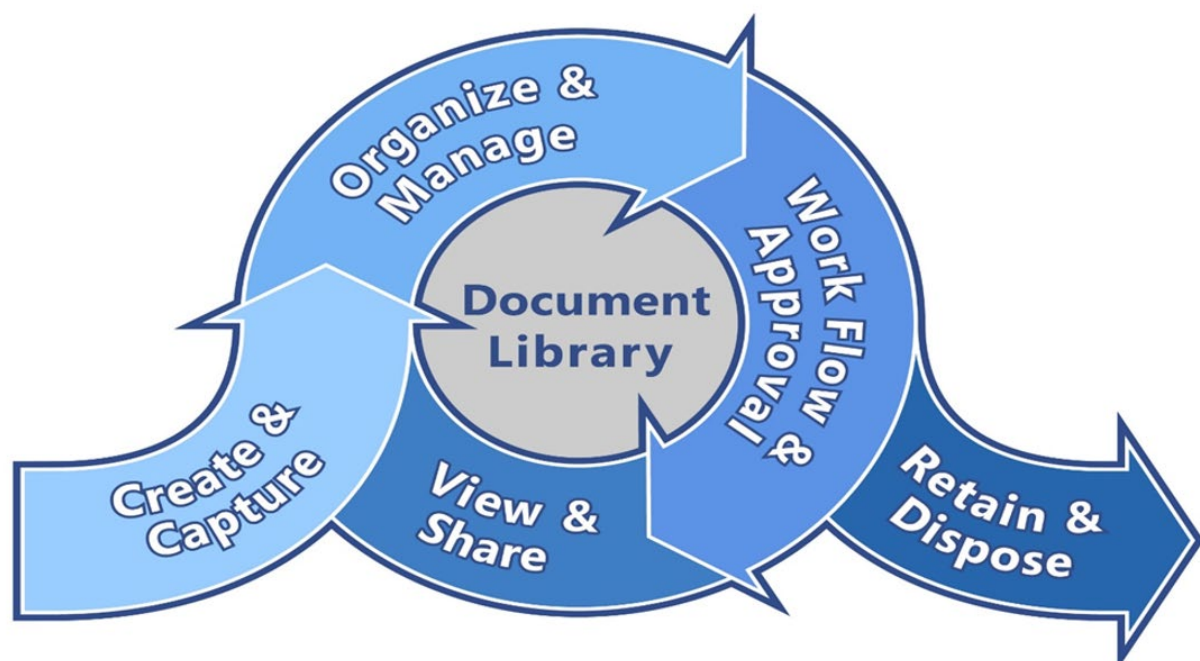
Module 1 – Lesson 1 – Recordkeeping at UNE – Why should we care about Records Management?

What is Records Management?

“Records management, also known as records and information management, is an organizational function devoted to the management of information in an organization throughout its life cycle, from the time of creation or inscription to its eventual disposition.

This includes identifying, classifying, storing, securing, retrieving, tracking and destroying or permanently preserving records. The ISO 15489-1: 2001 standard defines records management as field of management responsible for the efficient and systematic control of the creation, receipt, maintenance, use and disposition of records, including the processes for capturing and maintaining evidence of and information about business activities and transactions in the form of records”.

https://en.wikipedia.org/wiki/Records_management





Why should I care?

Imagine you are in a Courtroom; 'June University' has been called to the stand.

June has been asked to give supporting evidence in a case where, if it loses, UNE stands to forfeit millions of dollars and it will likely have a huge negative impact on the reputation of everyone involved.

June answers the questions with exceptional clarity and firmness, all is going well, until...

'So, June, you claim all of this, but have you got any **evidence**?'



At this point we have to look at what might have happened in the past.

Four years ago,



Before June started with UNE she had to review the Position Description for her role and she would have seen...

"Ensure knowledge of the Rules, Policies and Procedures of the University (available on the University website) is maintained and abide by them as they are amended, varied or replaced from time to time."

June attended induction where she was informed of the importance of Records Management and, hopefully, also attended the Records Management (Incorporating TRIM) training or its equivalent, at the time.



Sliding Doors moment...



What June decides at this time could then decide the outcome of the court case.

If she decided that Records Management was too hard and that she would rely on others to keep records, then the court case will possibly end very badly for UNE.



Alternatively, if she did the simple thing of Saving all Records in the appropriate location/s then she will be able to simply answer the Barrister with a ...

‘



YES, I do have evidence



What will you decide?



What is a Record?

There are a number of definitions with varying levels of complexity.
Often the Records Team at UNE will simply say that a record is ...

‘Anything that is a decision or leads to a decision’

This is correct but perhaps we could look for a little more detail.

[Wikipedia](#) says that a Records is...

‘A record is a document consciously retained as evidence of an action.’

That [NSW State Records Act](#) states that ‘Record’...

‘...means any document or other source of information compiled, recorded or stored in written form or on film, or by electronic process, or in any other manner or by any other means.’

The bottom line is that a Record is all of these things.

How do I know what documents are Records?

It may seem a little difficult sometimes trying to determine which of the many documents you handle each day are a record. Suffice to say that almost every document or communication you come across will be a record.

The Records team can provide guidance around whether a document is a Record and where it should be saved.



If in doubt - treat it as a record.



Record Keeping is more than just a 'good idea'.

There are a number of pieces of legislation that require Universities (and other Government institutions) to keep evidence of their business transactions.

Higher Education Standards Framework (Threshold Standards) 2015 & TEQSA <https://www.teqsa.gov.au/teqsa-act>

The Tertiary Education Quality and Standards Agency (TEQSA) specifies in their [Contextual Overview](#) that ...

'the provider's information management system meets certain critical requirements concerning content, security and integrity (7.3)'.

Specifically, the Higher Education Standards Framework (Threshold Standards) 2015 states...

3. *Information systems and records are maintained, securely and confidentially as necessary to:*
 - a. *maintain accurate and up-to-date records of enrolments, progression, completions and award of qualifications*
 - b. *prevent unauthorised or fraudulent access to private or sensitive information, including information where unauthorised access may compromise academic or research integrity*
 - c. *document and record responses to formal complaints, allegations of misconduct, breaches of academic or research integrity and critical incidents, and*
 - d. *demonstrate compliance with the Higher Education Standards Framework.*

(https://www.legislation.gov.au/Details/F2015L01639/Html/Text#_Toc428368870)



RECORDKEEPING DURING COVID-19 (CORONAVIRUS)



Recordkeeping became even more important during the Covid-19 pandemic. The many changes in University policies and practices brought about due to social distancing and isolation must be retained and identified as Covid-19 related.

These include changes to Exams, Courses and Units and any enquiries or complaints generated by these changes.

TEQSA is looking to potentially make long term changes based on the issues raised during the pandemic.



<https://www.teqsa.gov.au/sites/default/files/joint-statement-principles-higher-education-sector-covid-19-response.pdf?v=1588910909>

This could result in an increased reliance, in the Higher Education Sector, on the keeping of accurate and reliable evidence of the changes and variations that are made to courses and student requirements.

“We are also mindful of managing the post-COVID-19 pandemic situation while not losing the learnings from the many innovative approaches taken and effectively benefitting from the rich sub-strate of experiences gained during the pandemic.”

State Records Act

<https://www.records.nsw.gov.au/recordkeeping>

Key records management provisions of the Act require public officers to:

- make and keep records that **fully and accurately document their operations and administration**
- establish and maintain a records management program in conformity with standards and codes of best practice approved by NSW State Archives and Records
- ensure that records are stored in conditions appropriate to their format and preservation requirements
- ensure that **records held in digital or other technology dependent formats are accessible for as long as they required**

Other key parts of the Act include provisions governing the disposal of records, a statutory basis for a right of public access to records more than thirty years old, and the transfer of records required as State archives to the custody and control of NSW State Archives and Records.



The great news is that you don't have to worry about the more complex aspects of the State Records Act. All you have to do is...

1. Manage your records by saving them to the correct location in TRIM;
and
2. Naming them in a consistent and logical way.

The Records Team will manage the Sentencing of records (How long we retain or when to Destroy records).

So why do we have to worry about destroying* records? Why don't we just keep every document or piece of data we create or receive forever?



The reality is that there is always a cost to keeping records...

- Hard copy records need to be stored.
- Digital records need servers.
- Organisations should only keep records as long as they are required to or the information is needed.
- Keeping records longer than necessary could see information used against the organisation.
- In addition, some information can only be retained as long as it is used for the purpose stated (privacy responsibilities)



* What does it mean to Destroy a record?

When a record is destroyed it means that the document itself (the PDF, MS Word, MS Excel etc document) no longer exists.

However, the Meta data is always retained.

Meta data includes things like;

- Name of the document
- Date Created
- Who Created it
- Where it was saved
- Who made changes



The Retention of this Meta data is why specialist Records Management software is needed.

NB: Record Evidence is never deleted

Recordkeeping and Privacy



The UNE Privacy Management Plan operates in accordance with;

1. [PRIVACY AND PERSONAL INFORMATION PROTECTION ACT 1998](#); and
2. [HEALTH RECORDS AND INFORMATION PRIVACY ACT 2002](#)

Under the UNE Privacy Management Plan ...



“Control retention and disposal of records: *The University needs to dispose of information when it is no longer required, and keep evidence of that disposal, for example:*

- i. *if the University stores personal information about an individual and that information is no longer required for any purpose associated with the University (and provided it is not contained in a State Archive, a Commonwealth record and not required by or under an Australian law, or court/tribunal order), the information should be either*
 - *de-identified to a requisite standard and stored securely; or*
 - *destroyed in a secure manner, in accordance with the University's Records Management Rule.*
- ii. *Evidence of the collection, storage & destruction of the personal or health information that is no longer required, should be produced on request from the Privacy Officer or other governance structures at UNE. In practice:*
 - *evidence and authorities for disposal of personal information records that are held within the UNE Records Management System are kept by the Records Team; and*
 - *University Representatives should ensure that any third-party services providers can provide UNE with copies of disposal standards and activities as part of their service agreement with the University and that all such reports and saved in the University's Records Management System”*

This means that the sentencing of Records which contain personal information must be completed in a Timely manner. Again, the Records Team will identify any Records that need to be Destroyed.



If you have questions about Privacy and your responsibilities go to the Privacy Web page here <https://www.une.edu.au/about-une/governance/privacy> .

See the UNE Privacy Management Plan <https://policies.une.edu.au/view.current.php?id=00130>

You can also contact the UNE Privacy Officer privacy@une.edu.au



Conclusion

So, what does this all mean for us as employees of the University?

Each one of us is responsible for maintaining our Records in a timely and efficient way. This means saving records as you go.



Recordkeeping is not an optional extra

Multiple pieces of legislation, UNE Policies and good business practices require that we manage records in a specific way.

If we don't manage Records in the correct way, we as individual workers and as the University as a whole, cannot claim to be compliant with the legislation mentioned.

Our accreditation as a University hinges on being compliant with all relevant legislation.



How can Records Team help?



The Records Team provides the following...

1. Face to Face Training for the use of TRIM (Content Manager) – all training is currently being delivered by Zoom. Go to Web Kiosk and book into one of the available sessions – there is a minimum of 1 session per month, shortly to increase to 2 sessions per month
2. Up to date Training Material and help documentation –available via
 - a. TRIM (Content Manager),
 - b. Records Webpage (<https://www.une.edu.au/about-une/governance/records-management-office>)
 - c. [Records = Organisational Knowledge](#) Moodle Page
3. Telephone support
4. Email Support records@une.edu.au

How to Contact Records



All emails to records@une.edu.au

Head of RP&G

Gabrielle Price

RP&G Project Officer

Collette Gooch ext 2259

Records & Governance Officers

Ian Smith ext 3948

Carolyn Lansley ext 3260





Module 2 – Lesson 1 - Desktop Client – Installing and Opening TRIM

To access the TRIM Desktop Client, you must ...

1. Be using a UNE Computer; and
2. If offsite, be connected via the VPN

Before you can download and use TRIM you must have access granted. Simply complete the 'New user request form' found in the Service Catalogue



[Home](#) > [Service Catalog](#) > [Accounts](#) > [New User - Content Manager \(TRIM\)](#)

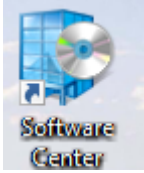

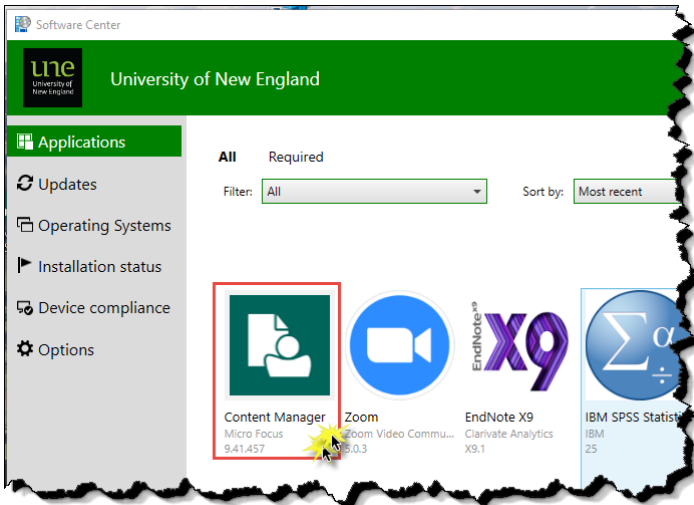
Or Click [here](#).

Please note that your Supervisor/Manager will be asked to approve your request.

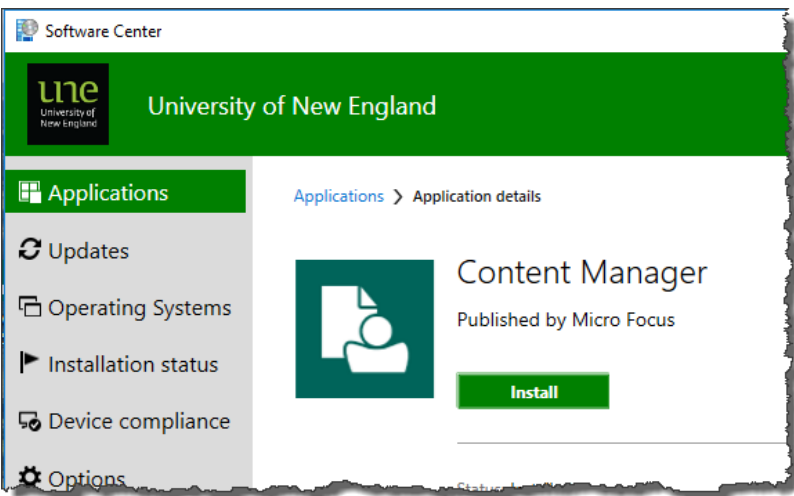

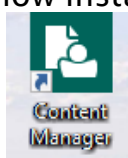


You will need to let the Records team know what areas of TRIM you will need access to. The easiest way to let us know if you are doing the same or similar job as someone else in your team.



Step	TRIM Desktop – Installing and Opening TRIM
1.	<p>The first time you go to open TRIM (including when you receive a new computer) you may need to download the software.</p> <p>Go to your computer's Software Centre icon  on your computer desktop</p>
2.	<p>The Software Centre will open and you should see the Content Manager Icon  in the Applications Tab</p>  <p>Double Click on the icon</p>



Step	TRIM Desktop – Installing and Opening TRIM
3.	<p>Click the Install button</p> 
	<p>You may need to restart your computer after the installation is complete</p>
4.	<p>TRIM is now installed, simply double click the short-cut on your Desktop</p> 

Some quick tips...

- 💡 You can have multiple TRIM windows open on your computer
- 💡 TRIM will happily stay open all day even if you don't need to go into TRIM itself

Do you want to know more?

Training/Help Modules (like this one) are available on the [Records Web](#) and [Moodle](#) Pages.



Face-to-Face or Online (via Zoom) training can be booked via Web Kiosk and is generally run once or twice a month depending on demand.

Records, Policy & Governance

TRIM – Content Manager

Desktop Client - User Guide



Module 2 - Lesson 2 - Desktop Client – Tour of TRIM

TRIM has been organised into several areas each with their own (but sometimes shared) functionality.

In this module we will identify the basic sections and their functions. For the most part, specific 'How to use' instructions will be in later modules.



Records, Policy & Governance

TRIM - Content Manager

Desktop Client - User Guide



Content Manager - [Records - favorite - 26 Records]

GLOBAL HOME SEARCH VIEW MANAGE ADMINISTRATION

New Copy Properties Edit Check In Check Out Notes Final Relationships Related Active Audit Events Find Records Refine Search Refresh Search Go Back Go Forward Count Schedule Tag All Intros Mail Reference Print Report Print Merge Dashboard Side by Side Cascade Close All Explorer Action/Procedure Complete Current action

Search for Search by Matching criteria

Records Record Number BOX20/994

QUICK SEARCH

Record Number	Title	Date Created	Date Registered
D18/145245	Records Management (Incorporating TRIM) Foundation Course - Participant Guide	31/OCT/2018 at 1:07 PM	31/OCT/2018 at 1:59 PM
WG18/414	RECORDS MANAGEMENT OFFICE RMO - REQUESTS AND FOLLOW UP TRIM ACCESS - ONLINE TRAINING - 2019 - 2020	19/DEC/2018 at 11:21 AM	19/DEC/2018 at 11:21 AM
A19/249	STRATEGIC MANAGEMENT - PROCEDURES - RECORDS POLICY & GOVERNANCE RP&G - PROPOSED PROCEDURE	11/FEB/2019 at 10:44 AM	11/FEB/2019 at 10:44 AM
A19/1781	TECHNOLOGY & TELECOMMUNICATIONS - PLANNING - Projects - HP RECORDS MANAGER HIRN (HPM) UPGRADE - CR - CLE SERVICE - CLOS	5/JUN/2019 at 8:54 AM	5/JUN/2019 at 8:54 AM
A19/1801	STAFF DEVELOPMENT - PLANNING - Induction - LEGAL & GOVERNANCE CORPORATE INDUCTION - AUDIT & RISK ARD - RECORDS POLICY ...	13/JUN/2019 at 9:03 AM	13/JUN/2019 at 9:11 AM
A19/2096	STAFF DEVELOPMENT - TRAINING - RECORDS POLICY & GOVERNANCE - TRAINING MATERIALS AND SUPPORTING MATERIALS - 2019	17/JUL/2019 at 11:18 AM	17/JUL/2019 at 12:44 PM

RECORDS LIST PANE

VIEW PANE

Record Type: DOCUMENT

Creator: Smith, Ian

Record Number: D18/145245

Title: Records Management (Incorporating TRIM) Foundation Course - Participant Guide

Container: A19/2096/1: A19/2096 - RP&G TRAINING MATERIALS - RECORDS

Enclosed?: Yes

Security: Classified

Author - E.g. From: (No E-mails)

Addressee - E.g. To:

Current Location: In container 'A19/2096/1 (Virtual Electronic Record)' since Wednesday, 31 October 2018 at 1:59 PM

Notes: This document has been superseded following the TRIM Upgrade to Content Manager "Thursday, 30 July 2020 at 12:51:58 PM (GMT+10:00) Smith, Ian:"

Date Registered: Wednesday, 31 October 2018 at 1:59 PM

Date Created: Wednesday, 31 October 2018 at 1:07 PM

Last Updated By: Smith, Ian

Last Action Date: Friday, 7 August 2020 at 9:18 AM

All actions

Document Details: In Content Manager document store, Adobe Acrobat Document, 5.5 MB (5,779,395 bytes), Document Store ID: Main Document Store:001+07TX+0I9I1RZM8KI.PDF

Access Control: View Document: Same As container A19/2096: <Unrestricted>
View Metadata: Same As container A19/2096: <Unrestricted>
Update Document: Same As container A19/2096: <Unrestricted>
Update Record Metadata: Same As container A19/2096: <Unrestricted>
Modify Record Access: Same As container A19/2096: <Unrestricted>
Destroy Record: <Unrestricted>
Contribute Contents: Same As container A19/2096: <Unrestricted>

Revision Number: 12

Checked Out To

Edit Status: Checked In

Related records

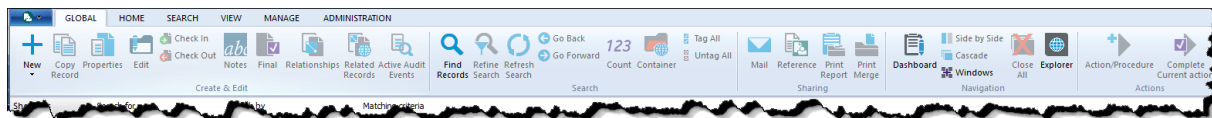
Properties Notes Preview Previous Rendition

Records - favorite - 26 Records

Smith, Ian CMPRD records.une.edu.au



Ribbon



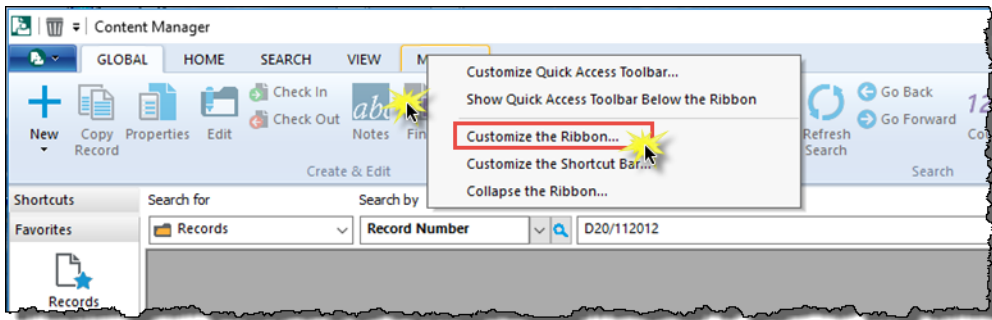
Much like Word, Excel and PowerPoint the ribbon provides access to a variety of options. The Records Team created a specific Ribbon for everyday users called 'Global'. It is divided into a number of sections each with a selection of common options...

- **Create & Edit** – (New, Copy Record, Check in and Check out, Notes etc)
- **Search** - (Find Records, Refine Search, Refresh Search, Go Back and Go Forward etc)
- **Sharing** – (Mail, Reference, Print Report, Print Merge)
- **Navigation** - (Dashboard, Close all, Explorer etc); and
- **Actions** - (Action/Procedure & Complete Current Action)

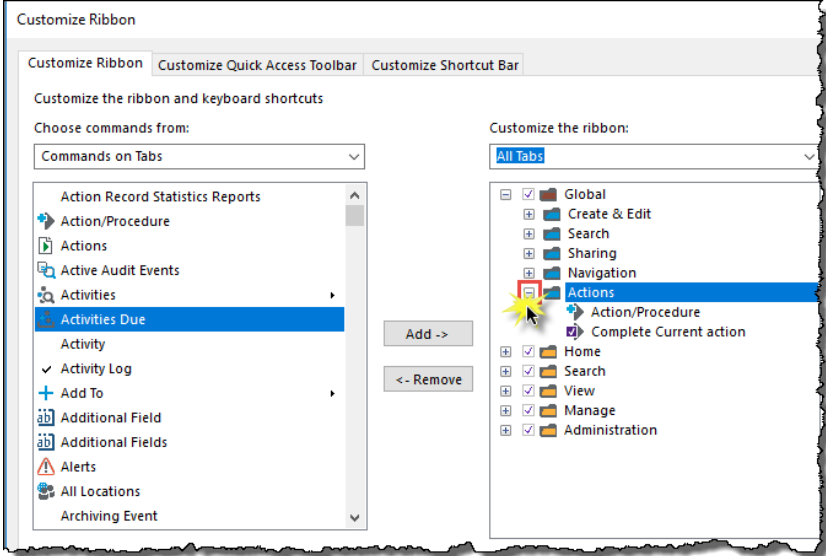
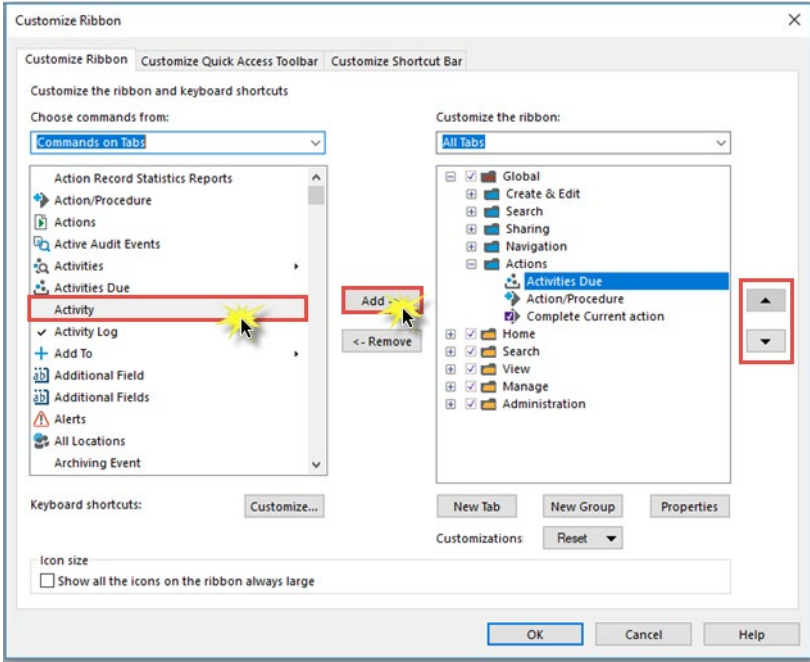
End users will generally not need to use the other Ribbons. However, if there is a function that you do use on a regular basis you can add it to your Global Ribbon (or even create your own Ribbon).



There are more options available with 'Right Click'. You can Right click on a Record and a long list of options will appear, more information can be found in **see Advanced Module**

Step	TRIM Desktop – Tour – Customising the Ribbon
1.	<p>Right Click anywhere in the Ribbon and select Customize the Ribbon...</p> 



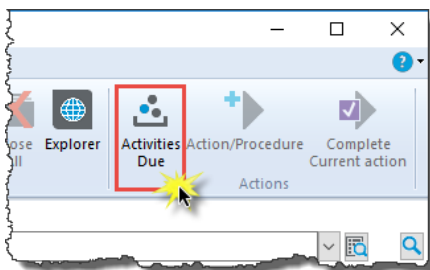
Step	TRIM Desktop – Tour – Customising the Ribbon
2.	<p>Find the location of where you want to add the new function (In this example I will add it to the Actions section of the Global Tab)</p> 
3.	<p>Simply add the required option and use the up and down option to move the option to the correct location in the ribbon.</p>  <p>Click OK when complete</p>

Records, Policy & Governance

TRIM – Content Manager

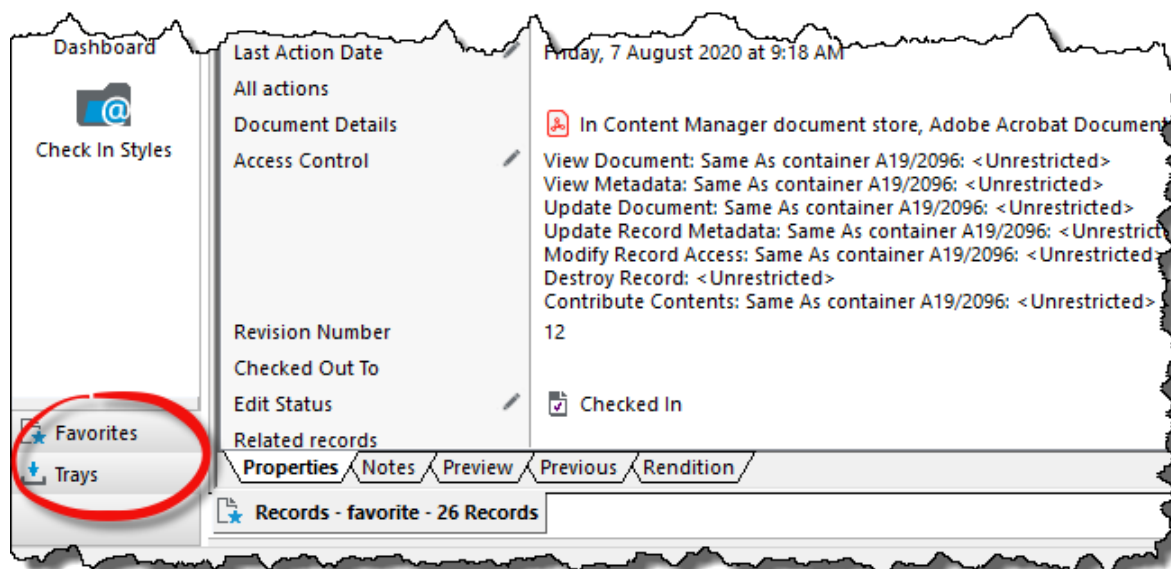
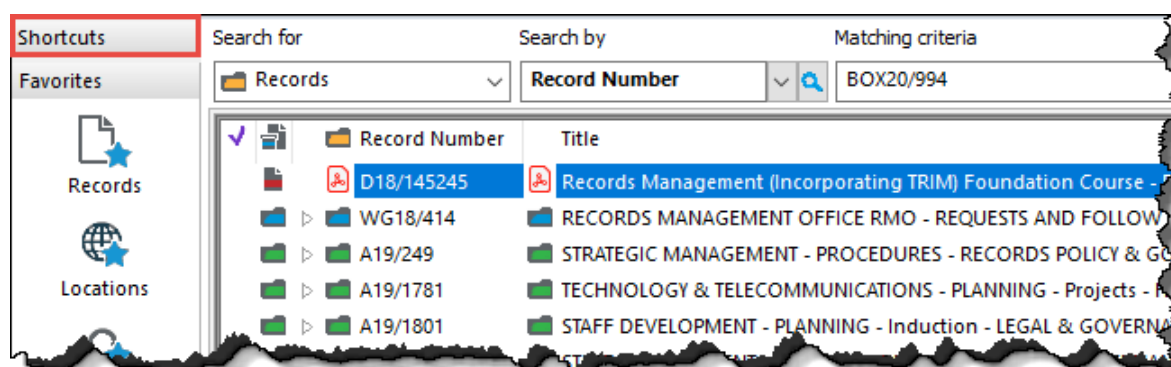
Desktop Client - User Guide



Step	TRIM Desktop – Tour – Customising the Ribbon
4.	<p>The new option will appear in the ribbon and location selected</p> 

Shortcuts

Running down the left-hand side of the window is the Shortcuts pane – here you can find Favorites (sic) and Trays



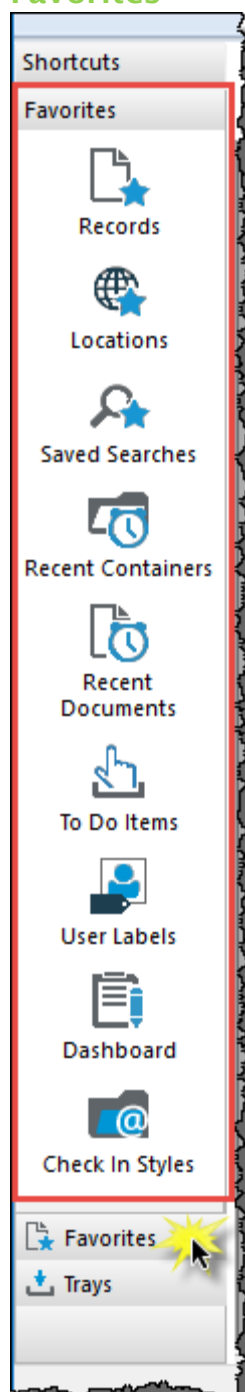
Records, Policy & Governance

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Favorites



Records* – the list of your 50 favourite records and/or containers. Best used sparingly as having 50 Favourites could mean you have to search in your favourites to find what you are looking for.

Locations – Mainly used by the Records Team for staff access

Saved Searches; see **Advanced Module** – Your 50 Favourite Searches

Recent Containers – The list of the last 50 Containers that you have interacted with (e.g. Saved a record to)

Recent Documents - The list of the last 50 documents that you have interacted with (e.g. Saved or viewed)

To do Items - are like a diary where you can set a reminder to act on a specific container or document; see **Advanced Module**

User Labels – work like ‘Tags’, use this to sort your documents and containers how you want them. This can be shared with team members [see Module 4 - Lesson 3 - User Labels and Explorer](#)

Dashboard – Track your To Do items and Actions. Supervisors/Managers can use this to track individual staff’s progress. see **Advanced Module**

Check in Styles – are used when saving Emails (in Outlook) to TRIM. This button allows you to manage these including sharing your Check in Styles with team members [see Module 5 – Outlook Integration – Managing Emails](#)

** See below for more information*

Records, Policy & Governance

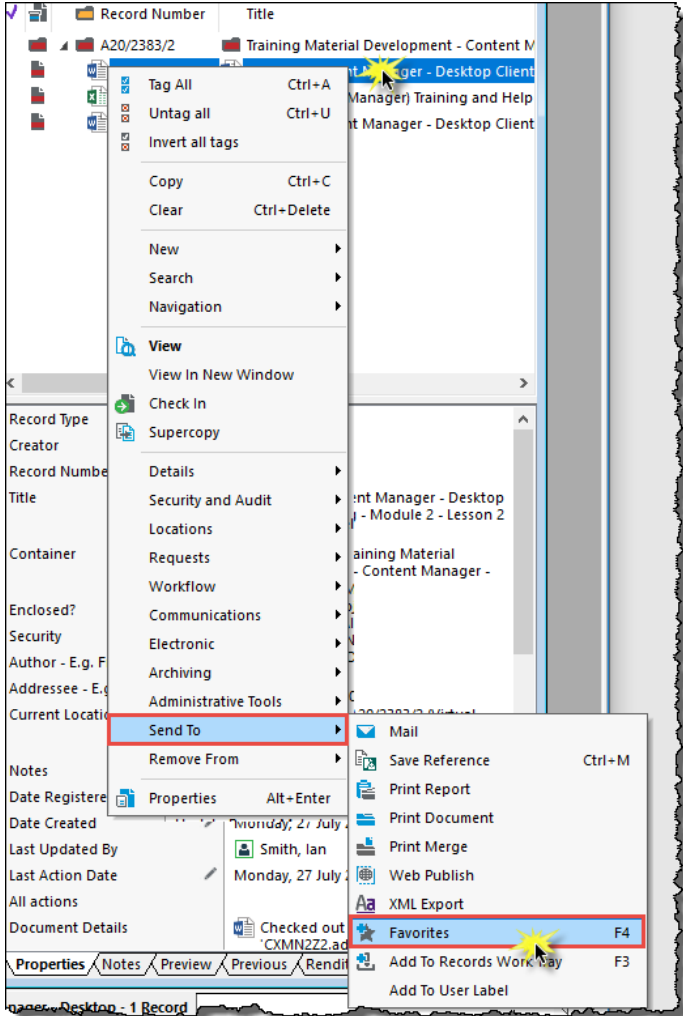

TRIM – Content Manager

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Making a Record a Favorite

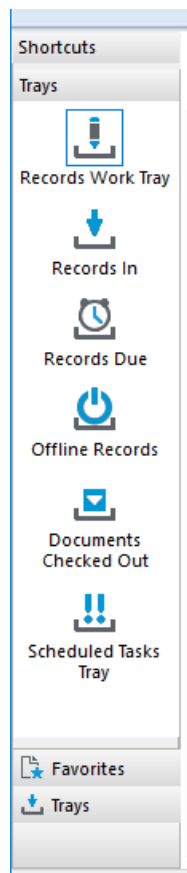
TRIM allows users to have up to 50 Favourites. By clicking on the Favourites button these will all appear (a bit like Favourites in Google Chrome).

Step	TRIM Desktop – Tour – Making a Record a Favorite
1.	<p>Right click on the document to be made a Favorite, click on send to and then click on Favorites</p>  <p>Or press </p>



Trays

Trays are a way of managing your work by having virtual work trays



Records Work Tray – If you are working on a particular document you can assign it to your Records Work Tray and easily return to it whenever you need to. **Right Click → Send to → Add to Records Work Tray**

Records In - You can assign a record to a staff member for review/completion

Records Due - displays all records with actions due assigned to you or your position

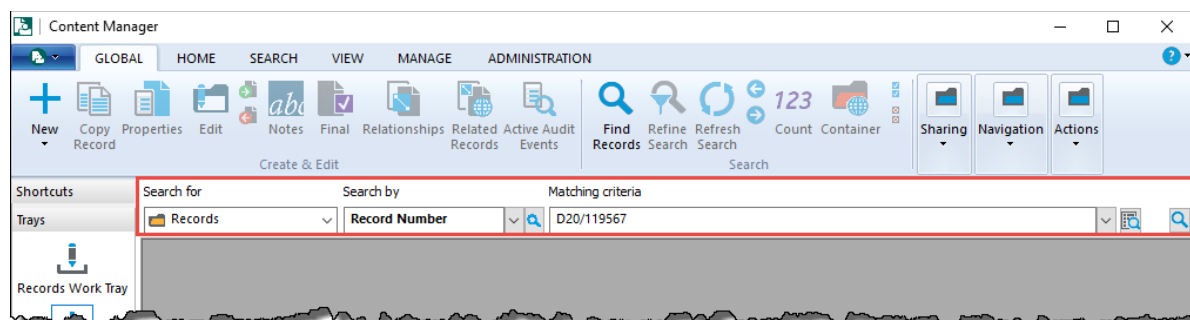
Offline Records - displays records with electronic attachments that you have checked out to Offline Records

Documents Checked Out - displays the electronic documents you have checked out

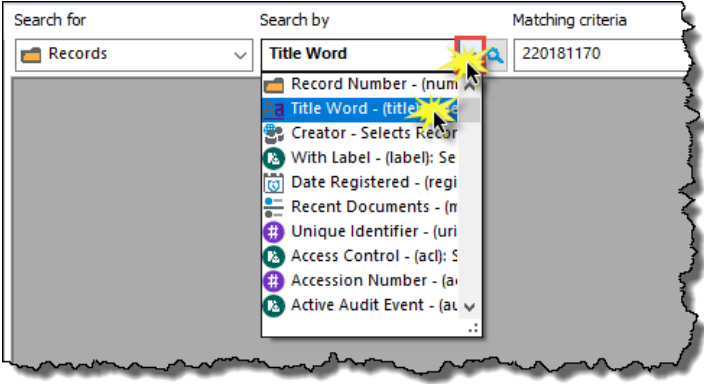

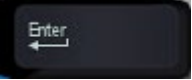
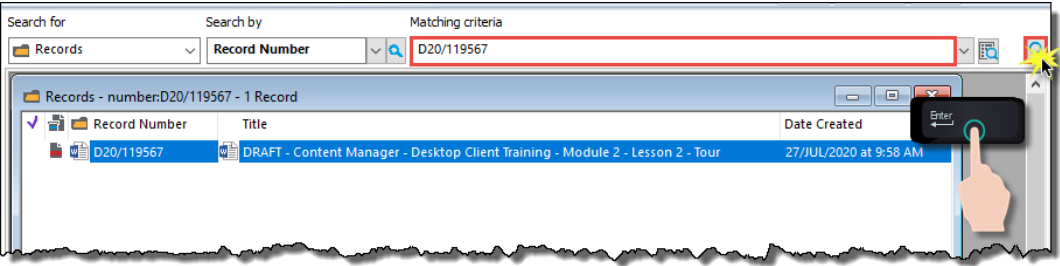
Scheduled Tasks Due - displays all records with a category attached that has a scheduled task that is due and assigned to you.

Quick Search

Sometimes we can be given a Record Number to find a document or a container. Where this is the case we recommend using the Quick Search option.





Step	TRIM Desktop – Tour – Using the Quick Search Option
1.	<p>You may need to change the ‘Search by’ field to Record Number.</p> 
2.	<p>Enter the Record Number and hit enter or click on  or press  and the results will appear in the Records List Pane</p> 



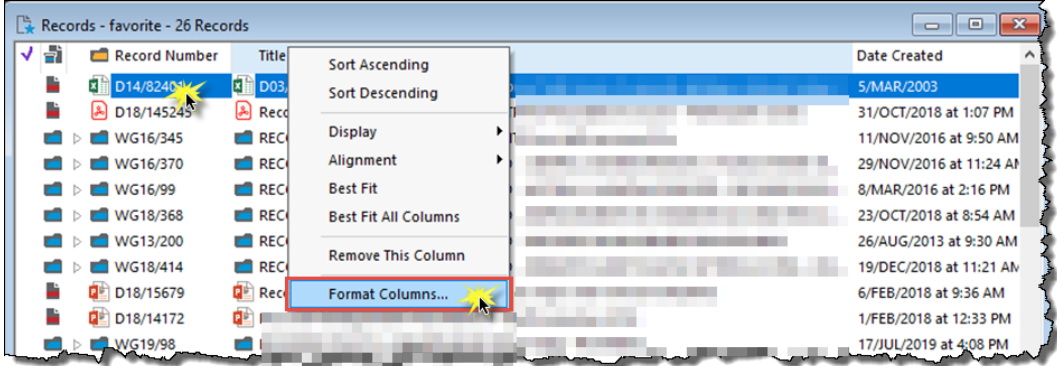
Records List Pane

When a search is completed the results appear in the Records List Pane. This window will default to display the Record Number, Title, Date Created and Date Registered fields for each record in the results.

Record Number	Title	Date Created	Date Registered
D20/119562		27/JUL/2020 at 9:51 AM	27/JUL/2020 at 9:51 AM
D20/119539		27/JUL/2020 at 9:14 AM	27/JUL/2020 at 9:14 AM
A20/2903		14/JUL/2020 at 3:24 PM	14/JUL/2020 at 3:24 PM
D20/99478		19/JUN/2020 at 10:40 AM	19/JUN/2020 at 10:40 AM
D20/99456		18/JUN/2020 at 4:29 PM	19/JUN/2020 at 9:54 AM
D20/99455		15/JUN/2020 at 10:26 AM	19/JUN/2020 at 9:50 AM
D20/97869		16/JUN/2020 at 2:55 PM	16/JUN/2020 at 2:56 PM
D20/97868		16/JUN/2020 at 2:53 PM	16/JUN/2020 at 2:56 PM
D20/97867		16/JUN/2020 at 2:54 PM	16/JUN/2020 at 2:55 PM
D20/97861		16/JUN/2020 at 2:41 PM	16/JUN/2020 at 2:46 PM
D20/87653		26/MAY/2020 at 8:45 AM	26/MAY/2020 at 9:52 AM
D20/87638		26/MAY/2020 at 9:32 AM	26/MAY/2020 at 9:30 AM
A20/2383		25/MAY/2020 at 10:10 AM	25/MAY/2020 at 10:15 AM
D20/75006		21/APR/2020 at 11:32 AM	21/APR/2020 at 11:33 AM
D20/74983		21/APR/2020 at 10:57 AM	21/APR/2020 at 11:13 AM

Columns

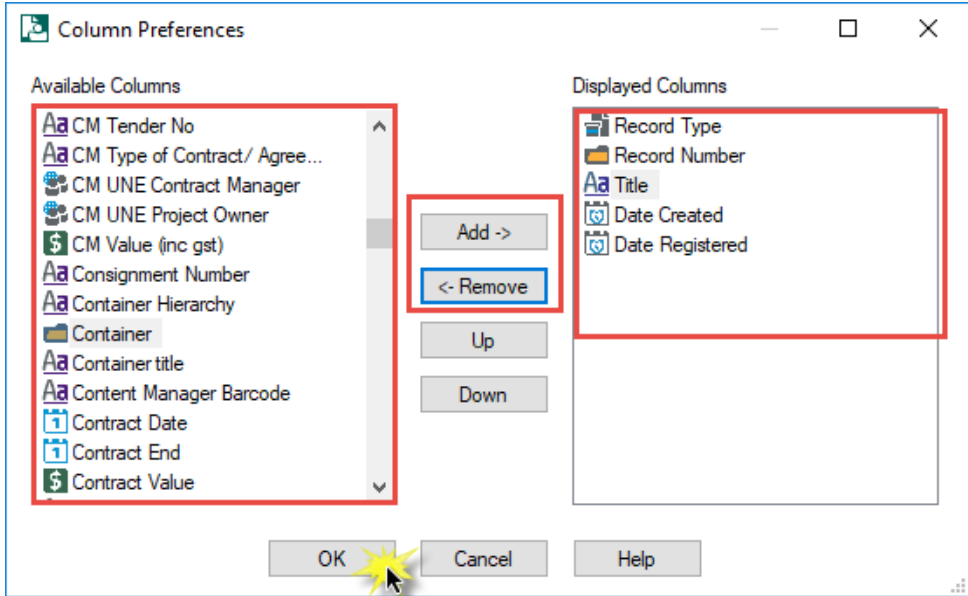
Columns can be added by simply Right Clicking and Clicking on Format Columns. Generally, if there is a data field in TRIM you can select this as a column.

Step	TRIM Desktop – Tour – Adding Columns
1.	<p>To add a column simply right click on one of the column headers</p> 



Step **TRIM Desktop – Tour – Adding Columns**

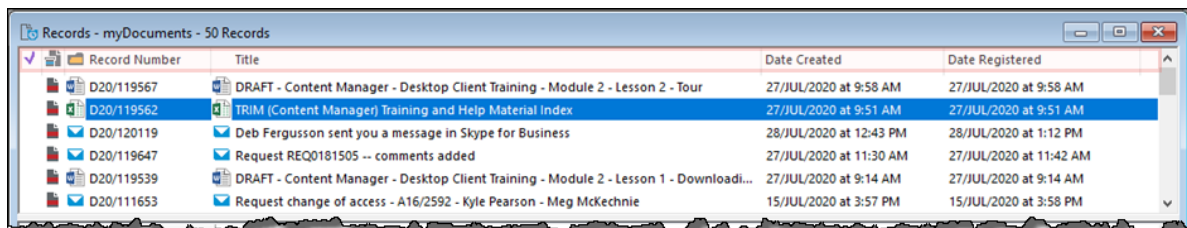
2. Locate the column you want to add (or delete) and click Add -> or <- Remove



You change the order by selecting Up or Down.

Sorting

You can quick sort by clicking on the column header you want to sort by.



Record Number	Title	Date Created	Date Registered
D20/119567	DRAFT - Content Manager - Desktop Client Training - Module 2 - Lesson 2 - Tour	27/JUL/2020 at 9:58 AM	27/JUL/2020 at 9:58 AM
D20/119562	TRIM (Content Manager) Training and Help Material Index	27/JUL/2020 at 9:51 AM	27/JUL/2020 at 9:51 AM
D20/120119	Deb Fergusson sent you a message in Skype for Business	28/JUL/2020 at 12:43 PM	28/JUL/2020 at 1:12 PM
D20/119647	Request REQ0181505 -- comments added	27/JUL/2020 at 11:30 AM	27/JUL/2020 at 11:42 AM
D20/119539	DRAFT - Content Manager - Desktop Client Training - Module 2 - Lesson 1 - Downloadi...	27/JUL/2020 at 9:14 AM	27/JUL/2020 at 9:14 AM
D20/111653	Request change of access - A16/2592 - Kyle Pearson - Meg McKechnie	15/JUL/2020 at 3:57 PM	15/JUL/2020 at 3:58 PM



View Pane

When a Record is selected the View Pane will show a variety of important information in a second window (below the Records List Pane).

Properties Tab

The default is the Properties Tab which will display the META DATA for the record.




Metadata describes other data. It provides information about a certain item's content.

<https://techterms.com/definition/metadata>

Record Type	DOCUMENT
Creator	Smith, Ian
Record Number	D20/119562
Title	TRIM (Content Manager) Training and Help Material Index
Container	A20/2383/2: Training Material Development - Content Manager - Desktop
Enclosed?	Yes
Security	Classified
Author - E.g. From: (No E-mails)	
Addressee - E.g. To:	
Current Location	In container 'A20/2383/2 (Virtual Electronic Record)' since Monday, 27 July 2020 at 9:51 AM
Notes	
Date Registered	Monday, 27 July 2020 at 9:51 AM
Date Created	Monday, 27 July 2020 at 9:51 AM
Last Updated By	Gooch, Collette
Last Action Date	Thursday, 30 July 2020 at 9:00 AM
All actions	
Document Details	In Content Manager document store, Microsoft Excel Worksheet, 10.0 KB (10,234 bytes), Document Store ID: Main Document Store:001+01EX+0K5E1RZQ8TG.XLSX
Access Control	View Document: Same As container A20/2383: <Unrestricted> View Metadata: Same As container A20/2383: <Unrestricted> Update Document: Same As container A20/2383: <Unrestricted> Update Record Metadata: Same As container A20/2383: <Unrestricted> Modify Record Access: Same As container A20/2383: <Unrestricted> Destroy Record: <Unrestricted> Contribute Contents: Same As container A20/2383: <Unrestricted>
Revision Number	2
Checked Out To	
Edit Status	Checked In
Related records	
Alternative container	
Expanded Number	D2020/119562
Current action	
Content Manager URL	http://records.une.edu.au/HPRMWebClient?uri=3636840&t=record&lang=en_englishUS&mbd=false
Overdue actions	
Top actions	
Attached Labels	Click to display



You may notice the little pen icon  against some of the fields. Where you see these, it means you have access to edit that field. For instance, everyone can update the Record Title (subject to access to the individual record) [See Module 4 – Lesson 3](#)

Record Type	AAA UNE
Creator	No inform
Record Number	A00/542
Expanded Number	A00/0542
Title	INFORM 2016
Notes	Thursday, 30 July 2020 at 9:00 AM
Attached Labels	Click to display
Current Location	Records P
Date Created	Thursday, 30 July 2020 at 9:00 AM



Some important information fields you will see are...

- **Security** - UNE has 9 different Security Levels. These are generally set by Records Team for each container. Most staff are 'Classified' – allows any staff member with TRIM access to view; subject to...
- **Access Control** – Restricts access to specific staff or groups of staff.



Records and Documents Management is as much about making sure that staff can see what they need to see as opposed to 'hiding' information under the premise that it's 'my work'.

Records should only be locked down where there is specific need to do so e.g. Privacy concerns.

Generally, the Records Team will **not** lock a Record or Container down to one person. Please contact the Records Team if you have any concerns.

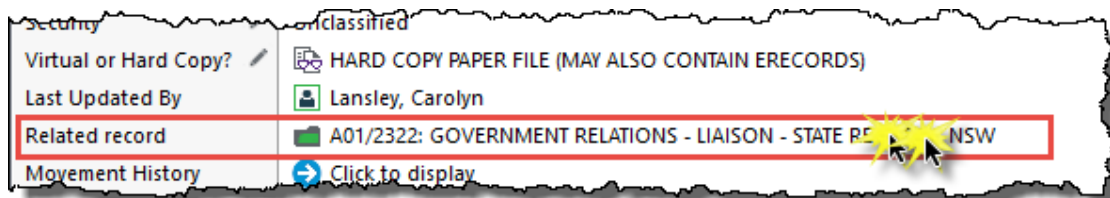
In addition, you may sometimes see Records that you should not access.

Just because you can see something, doesn't mean you should look at it.



See **Active Audit Events – Advanced Module**

- **Related Records** – any Records or Containers that have been related to this Record. You can even double click on the reference to open it in another window.

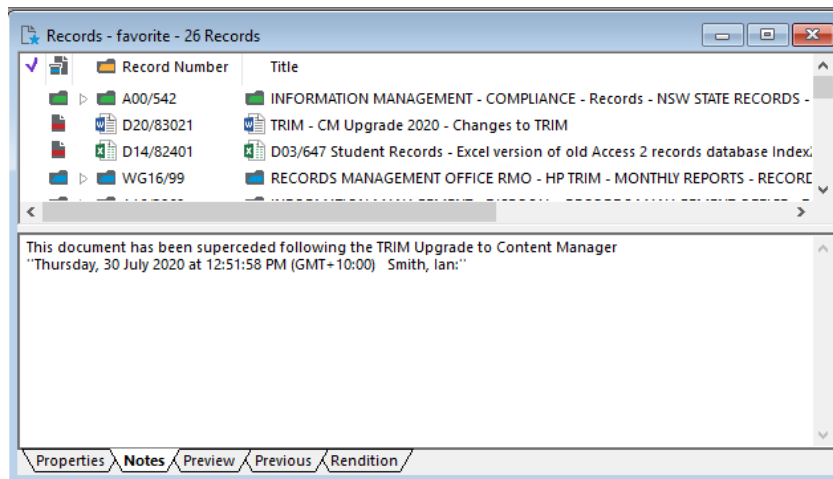


You can add and remove Meta Data Fields from your preferences – **see Advanced Module**



Notes Tab

Notes can be added to a Record or Container at any time. This tab gives you a view of any existing Notes.



For how to add a Note go to [Module 4 - Lesson 3](#)



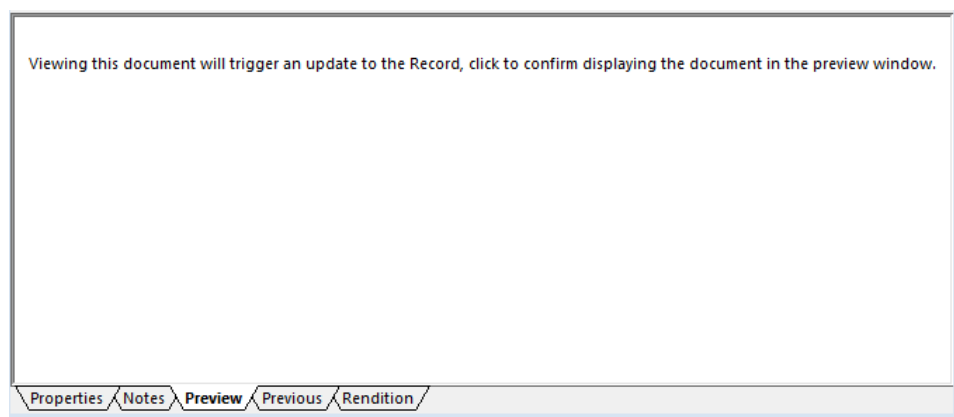
Once a Note has been added to a Record or Container this data becomes searchable in TRIM.

For Information on how to Search on Notes go to **Advanced Module**

Preview Tab

Click on this Tab to see a preview of the document. Microsoft Office files can be viewed (although sometimes graphics do not render very well). Audio/Video files cannot be Previewed.

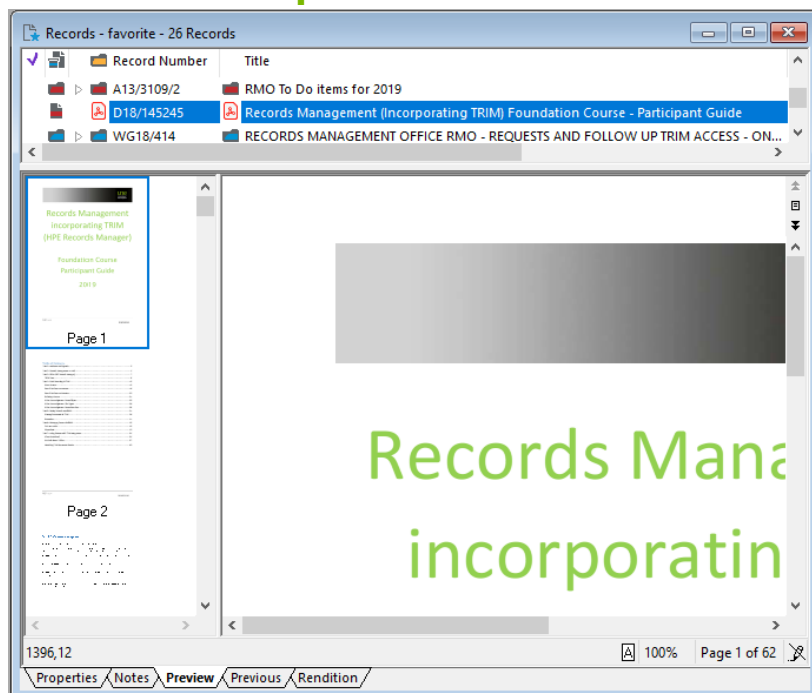
Click on the Preview window to view the record.



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TRIM will record any time someone views a Record. You therefore need to click, as directed, to make the preview appear. This is to reduce the instances of accidental viewing of a record.

See **Active Audit Events** – see **Advanced Module**

Rendition Tab

TRIM allows for different file types of the original records to be saved e.g. the MS word is the original, however can also save the PDF version of the record too.

see **Advanced Module**

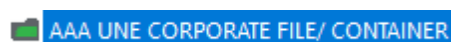
Interpreting Information in TRIM

There is a lot of information in TRIM and interpreting it might seem a little confusing at first. Each record that is saved in TRIM has certain information that must be associated with it (Metadata). Some of this Metadata is set by TRIM to help manage the record.

Here is a rundown of different elements you will see.

Record Types

There are a number of different Record Types. Each Record Type has its own rules associated with it. The most common Record Types you may see are:



- The Corporate File (we can call them File, Folder or Container, they are all the same thing) is where records are stored. They default with no specific security or name but are created by the Records Team for storage of your records.



Remember, these are created based on the subject/topic and not who is saving them

(There is no such thing as a Team File).

The first section is always named in accordance with the Thesaurus set down by the NSW State Archives and Records office (Keyword AAA Thesaurus).

As an example, a Strategic Project in its initial phases would have to be named STRATEGIC MANAGEMENT – PLANNING – PROJECTS (Please note that this example is simplified and it's possible that it could be another PLANNING or PROJECT option).

However, the name would also include as free text the area responsible for the Project and the actual Project name (In green), so it would look like...

STRATEGIC MANAGEMENT – PLANNING – PROJECTS – RECORDS POLICY & GOVERNANCE RPG – IMPROVING RECORDS MANAGEMENT AT UNE - 2020

There would also be a Retention Schedule assigned which tells us how long we have to keep this Record (**See Advanced Module**)



You don't have to worry about the naming and retention. The Records Team will create all files and ensure these critical fields are created correctly.

You may find a file has already been created for your records (the Records Team will attempt to create all containers that you need at the beginning of each calendar year). Obviously, there will be times where a file will need to be created - simply email records@une.edu.au and include the purpose of the file and what sort of records (not file types – MS Word etc but the subject/topic) will be stored in the file.



DOCUMENT

- is the most common Record Type. It has no specific security or rules



E STUDENT 01 DOCUMENT


- for student documents – automatically locks the document down to only those staff who have student information access.



E STUDENT 99 FILE CONTAINER

for student records. Locked down to only those staff who have access to student records. The Container number is always the student number.




 **SUB FOLDER** Unlike a share drive or even your computer file system, TRIM has a 'flat' structure. Essentially you can have a file (Corporate, Student etc) and one level of Sub folders. If you feel you need greater flexibility you may want to consider using 'User Labels' [See Module 4 – Lesson 3](#)

There are many other Record Types, including some that are historical and are not used for current Records.

Record Numbers

Each Record Type has its own, system allocated Record Number sequence.

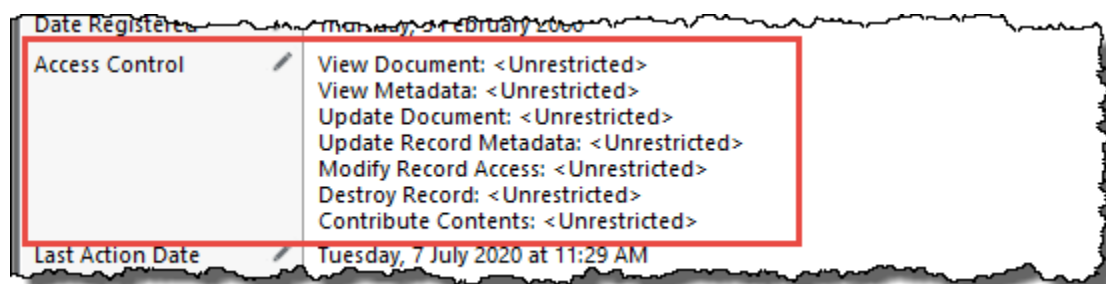
For instance, Corporate Files run with an 'AYY/####' pattern. The first corporate file created each year would be AYY/1 (so for 2021 it would be **A21/1**). As each file is created the new number will be allocated (A21/2, A21/3 etc).

Documents ( **DOCUMENT**) have a pattern of DYY/####. Again the very first document created in 2021 will be D21/1.

The same applies for most Record Types, however the exceptions are student and staff files. Student containers (EStudent99 files) are given the student number manually when created and staff files work the same way with staff numbers being the Container number.

Access Control

Where a document or Container needs to be locked down to a specific group of staff, Access Control will display who can view, edit or save to the container or its contents.



Generally, using View Document and View Metadata options will enable the nominated users to view and edit the Record.



When first saved to a Container the document will take on the attributes of that Container – so Access Control of the document is the same as the Container.

However, if you move a Record to another Container you may have to change the access on the Record to suit

For more information on Access Control go to **Advanced Module**

EDIT Status

Displays if the Record has been Checked Out. [See Module 4 – Lesson 3](#)

Related Records

Records and Containers can be Related to each other in various ways. For instance, a Corporate Container for a Contract can be made ‘Related to’ the Project File that Contract is for.

Additionally, you may find that a Record could be located in 2 different Containers. Rather than saving the record twice you could save it in the most appropriate container and make it ‘Alternatively within’ the other container. This way it will appear in both containers but there is only one document.

For more on Related Records and how to use them go to [Module – Lesson 3](#)

Revision Number

TRIM is not only a Records Management system but a Document Management System as well. It will manage your document so that all Revisions (or outside of TRIM we generally refer to them as Versions) are held in the one place and people can’t accidentally update the wrong version of a document.

The Revision Number field will tell you how many Revisions (or Versions) there have been including the current Revision.

For more information on Revisions go to [Module 4 – Lesson 3](#)

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The Current Revision is always the one that appears in the Records List Pane...

Record Number	Title	Date Created
D20/119567	DRAFT - Content Manager - Desktop Client Training - Module 2 - Lesson 2 - Tour	27/JUL/2020 at 9:58 AM

Container	A20/2383/2: Training Material Development - Content Manager - Desktop
Enclosed?	Yes
Security	Classified
Author - E.g. From: (No E-mails)	

Revision Number	9
Checked Out To	Smith, Ian
Edit Status	Checked Out



Module 3 – Lesson 1 - Desktop Client – Basic Searching

TRIM has a huge number of options when it comes to searching for Records. However, for most users, there is a small number that are the most useful. Of these 'Title Word' is the most common and likely the easiest.

Before you start searching you need to have a basic understanding of what it is you are searching for. Simply searching for a document with a word like 'TRIM' (for example) will only give you far more results than you can easily look through for 'your' document. (as of 30 July, 2020, there were 23,372 results for the Title Word 'TRIM'!).


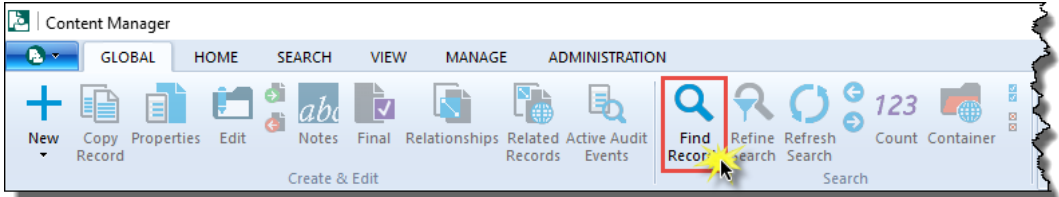
So, you will need to ask yourself a few questions first. Things like...

- What was this document likely to be named IF the standard naming convention was used?
- What key words would likely have been referenced?

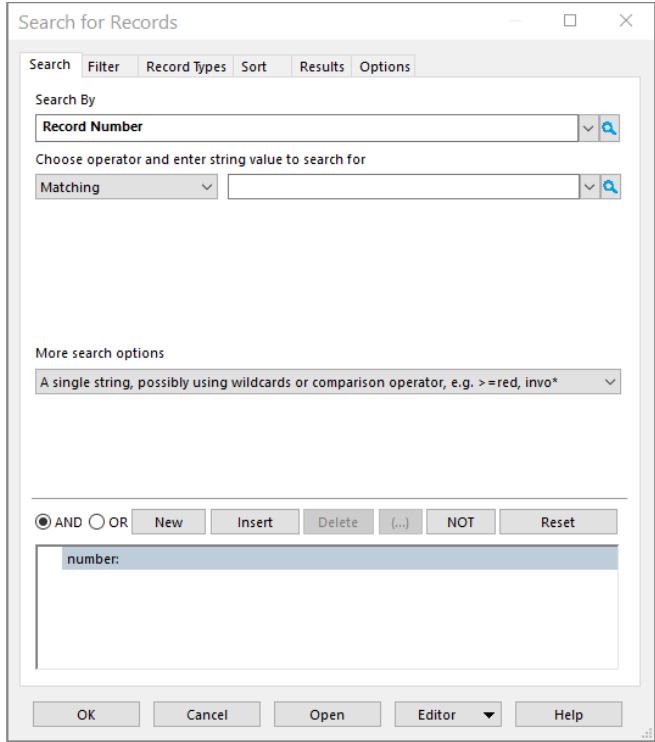
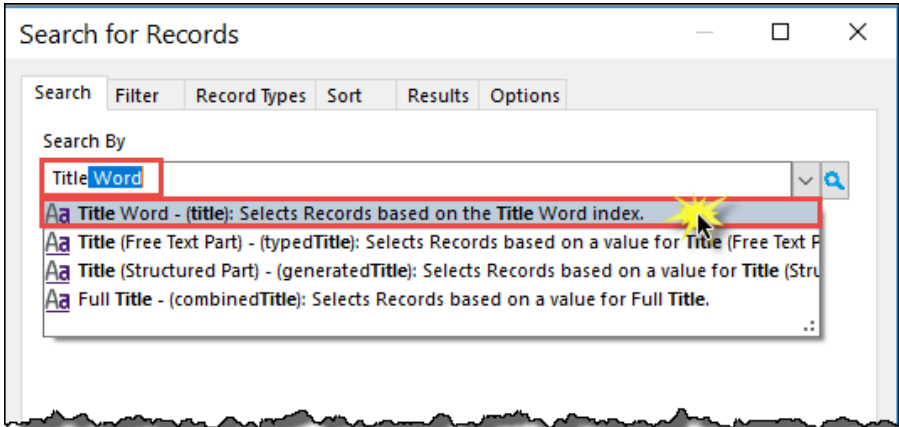
There are many more we could ask but these would be your starting point.

Creating a Title Word Search

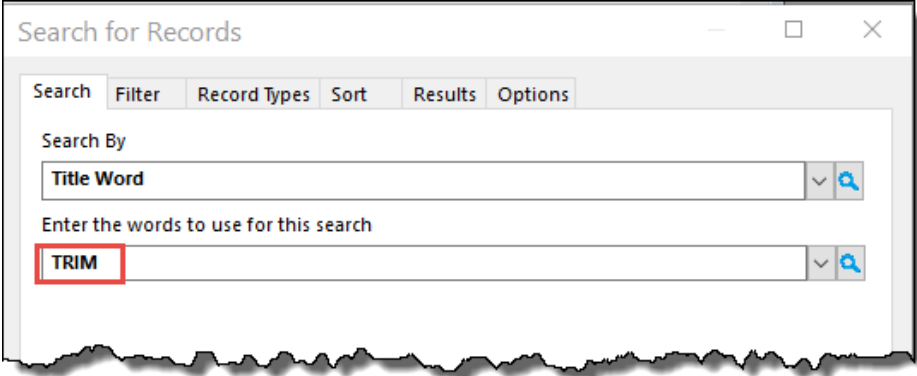

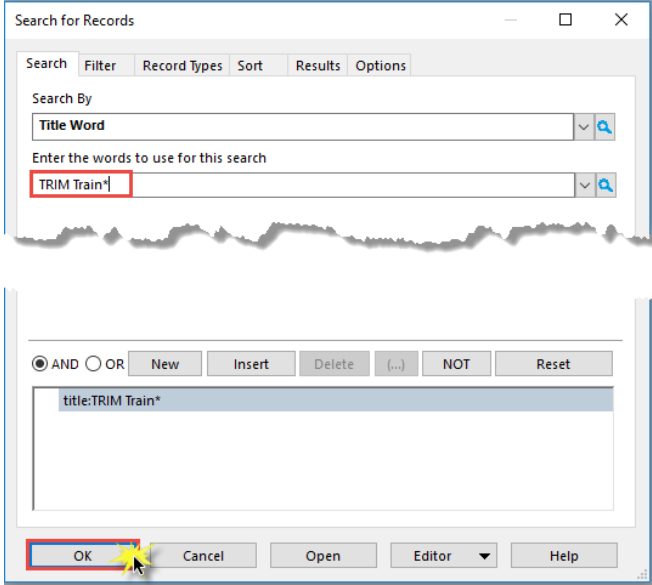
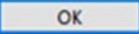


Step	TRIM Desktop – Basic Searching – Title Word
1.	<p>Identify what you are looking for. In this example, I am looking for a document about TRIM training that took place in August 2019.</p>
2.	<div data-bbox="454 1176 558 1310">  Find Records </div> <p>Click on</p>  <p>The screenshot shows the 'Content Manager' application window. The ribbon is set to 'SEARCH'. The 'Find Records' button, which features a magnifying glass icon, is highlighted with a red rectangular box and a yellow starburst. Other buttons visible in the ribbon include 'New', 'Copy Record', 'Properties', 'Edit', 'Notes', 'Final', 'Relationships', 'Related Records', 'Active Audit Events', 'Refine Search', 'Refresh Search', 'Count', and 'Container'.</p>



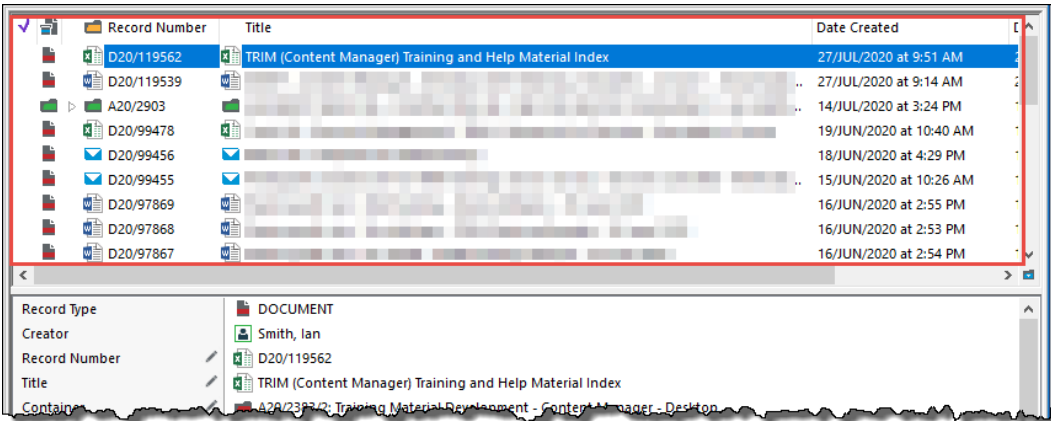
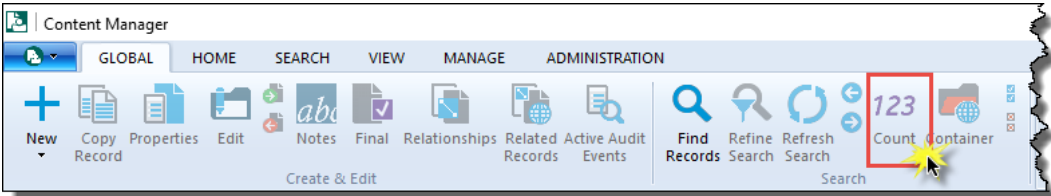


Step	TRIM Desktop – Basic Searching – Title Word
3.	<p>The ‘Search for Records’ window will open.</p> 
4.	<p>It’s possible that the ‘Search by’ field will default to something other than Title Word.</p> <p>If this is the case then Highlight the current option (in this case Record Number) and type ‘Title’, TRIM will try to find any Search by option with the word Title in it.</p> <p>Select ‘Title Word’</p> 

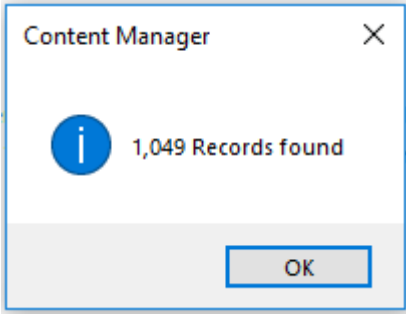



Step	TRIM Desktop – Basic Searching – Title Word
5.	<p>You then enter the word/s you want to search by, in this example we will use 'TRIM'...</p> 
	<p>TRIM is not case sensitive.</p> <p>It will look for all records with the word 'TRIM' in the title, regardless of the case used.</p>
6.	<p>Because I know not all documents with TRIM in the title are about a training session I will add that information. However, I will use a 'Wildcard' just in case for the word 'train'. This will cover the other possibilities of trained, training, trains, trainer etc</p>  <p>Click </p>


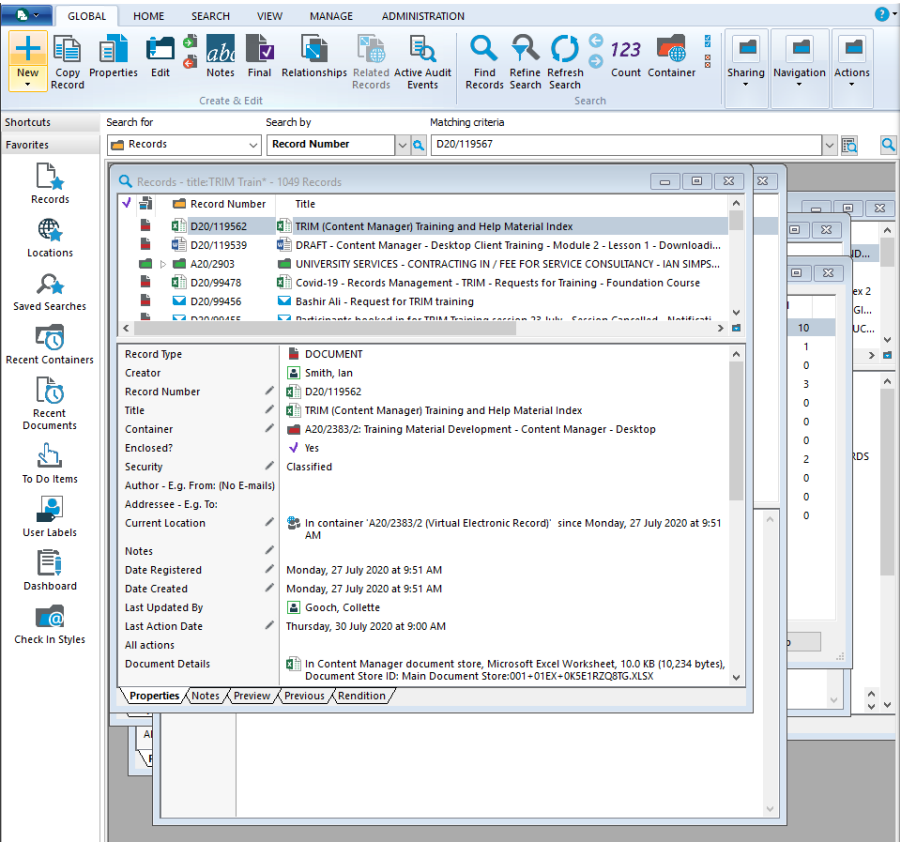


Step	TRIM Desktop – Basic Searching – Title Word
	<p data-bbox="325 293 512 577">  </p> <p data-bbox="544 286 1380 398">A Wildcard tells the system that you are looking for a pattern of characters but there may be additional characters.</p> <p data-bbox="544 421 1396 533">This is particularly useful with plural (card → cards) or other words that can have letters after the primary word.</p> <p data-bbox="319 555 1380 712">You can also use the Wildcard at the beginning of a word (train → Retrain) or in the middle, particularly where there are common spelling mistakes that might influence the search results (receipt → rec*pt).</p> <p data-bbox="319 723 1292 801">You can also use multiple Wildcards both in a single word and multiple words.</p> <p data-bbox="319 813 1225 857">e.g. Single Word – ‘*train*’, Multiple words – ‘Train* Aug*’</p> <p data-bbox="319 891 1054 947">The Wildcard symbol for TRIM is the asterisk *</p>
7.	<p data-bbox="319 981 1058 1014">The results will appear in the Records List Pane</p> 
8.	<p data-bbox="319 1559 1390 1671">But it may still be a bit hard to work out which is the document you want. There are a number of records that appear and it's hard to tell how many you might have to scroll through.</p> <p data-bbox="319 1693 1390 1727">However, you can quickly see how many there are by clicking on the</p> <p data-bbox="325 1738 395 1783">123</p> <p data-bbox="325 1794 531 1839">Count button.</p> 



Step	TRIM Desktop – Basic Searching – Title Word
9.	<p>In this example there are 1,049 records that meet the criteria.</p> <div data-bbox="651 344 1059 656" data-label="Image">  </div> <p>Obviously, we won't go looking through that many records.</p>
	<p>If you have replicated this search yourself you will notice that you may have a different result.</p> <p>It will all depend on your access level. You may see substantially less records as the example was performed by a member of the Records Team, who will have access to (almost) everything.</p> <p>You may find you have more because you are performing this search after it was initially completed on 31 July 2020. Any records added to TRIM after this date (and time) that meet the criteria will then appear in the results.</p>
10.	You will need to Refine the existing search

Refining a Search

Step	TRIM Desktop – Refining a Search
1.	When your search doesn't give you what you are after don't create a new search, simply 'Refine' the existing search
	<p>Try to avoid opening too many windows inside of TRIM (particularly when you are just learning). It's far easier to have a single window at a time rather than multiple windows.</p> 

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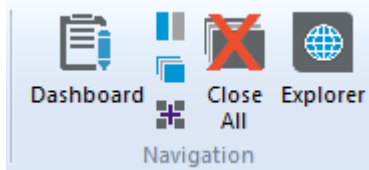


Step

TRIM Desktop – Refining a Search



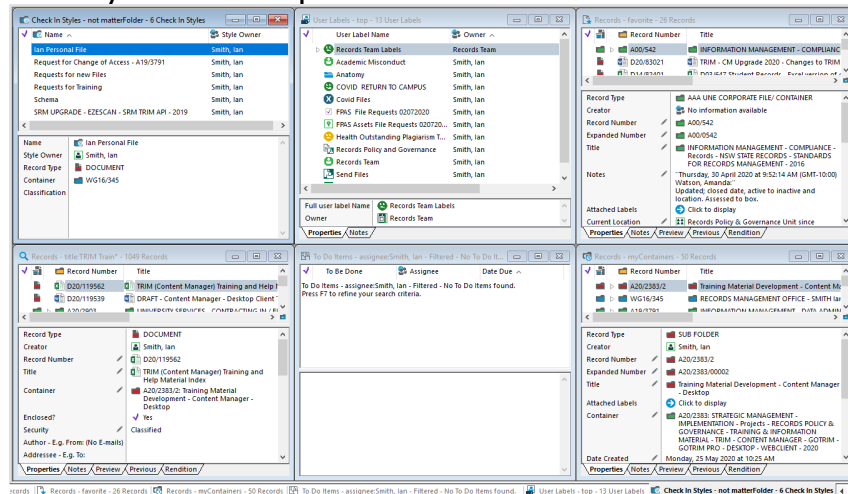
If you do have a number of windows open use the Navigation



section of the Global Tab

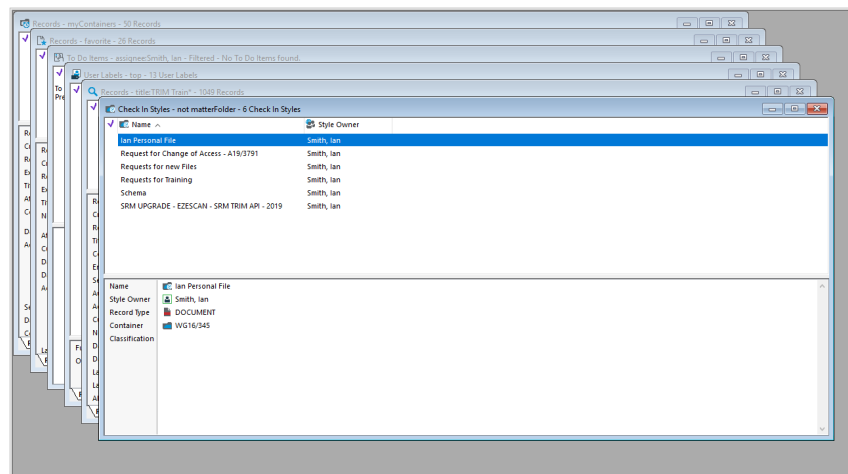
and the ...

Side by side option





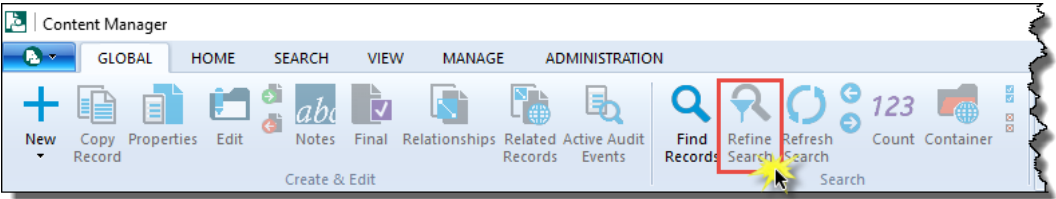
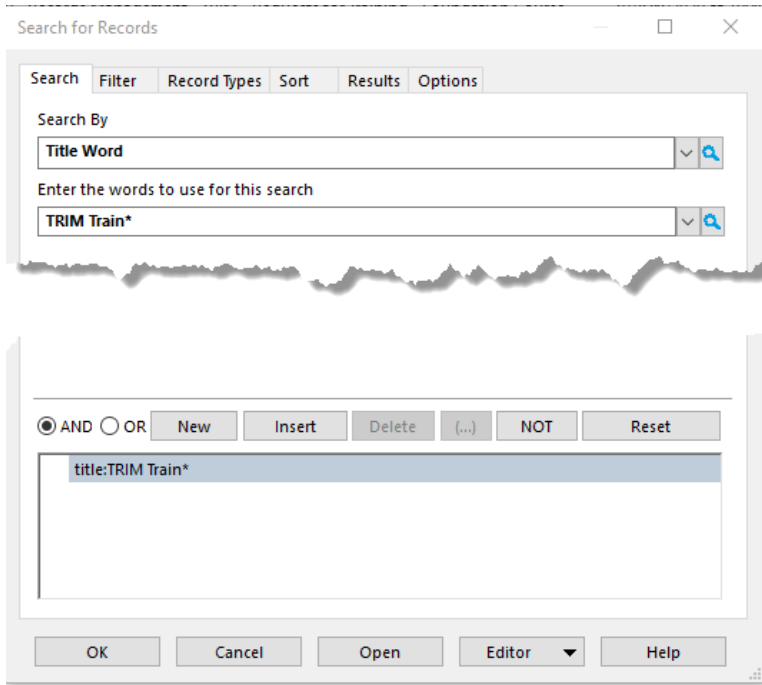

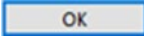
Or

Cascade

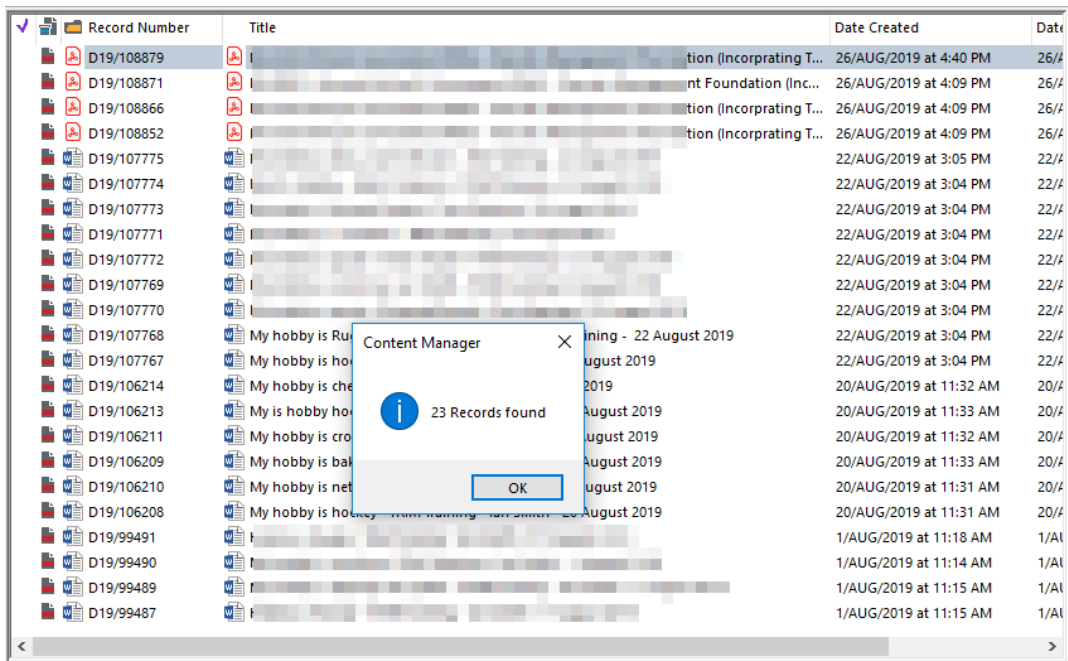


To help you view what you have open



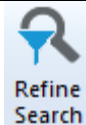
Step	TRIM Desktop – Refining a Search
2.	<p data-bbox="319 376 1348 456">To Refine the Search click on  or press the  key on your keyboard</p> 
3.	<p data-bbox="319 707 1362 748">The Search for Records window for the existing search will appear.</p> 
4.	<p data-bbox="319 1469 1305 1550">Add some additional information words – in this case I will add 'August' (or I could add Aug*) and '2019'</p>  <p data-bbox="319 2011 550 2051">Click </p>



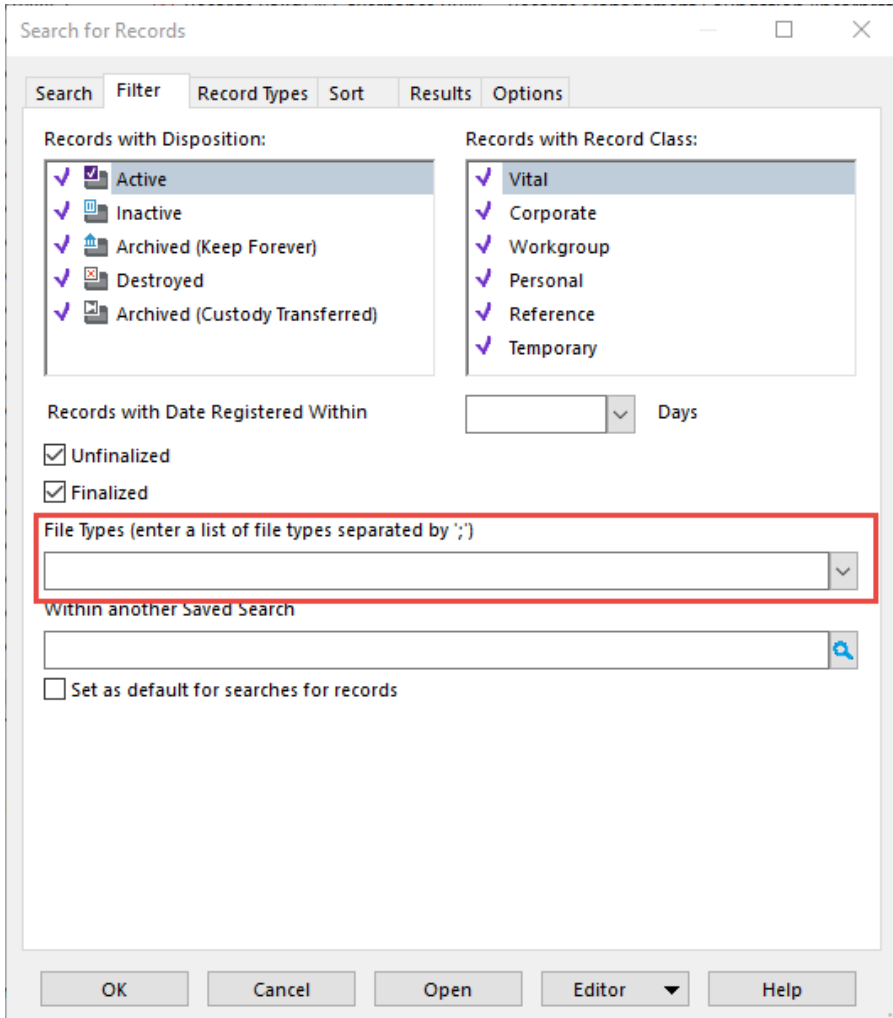
Step	TRIM Desktop – Refining a Search
5.	<p>This time I have reduced the number of records that appear in the results</p> 
6.	<p>Of course, the document I am looking for may not be in this group either. We will look at some additional options</p>

You don't have to just use words to help you locate the records or containers you are after. You can also look for other differentiating features like Filters on Document Type and Record Type.

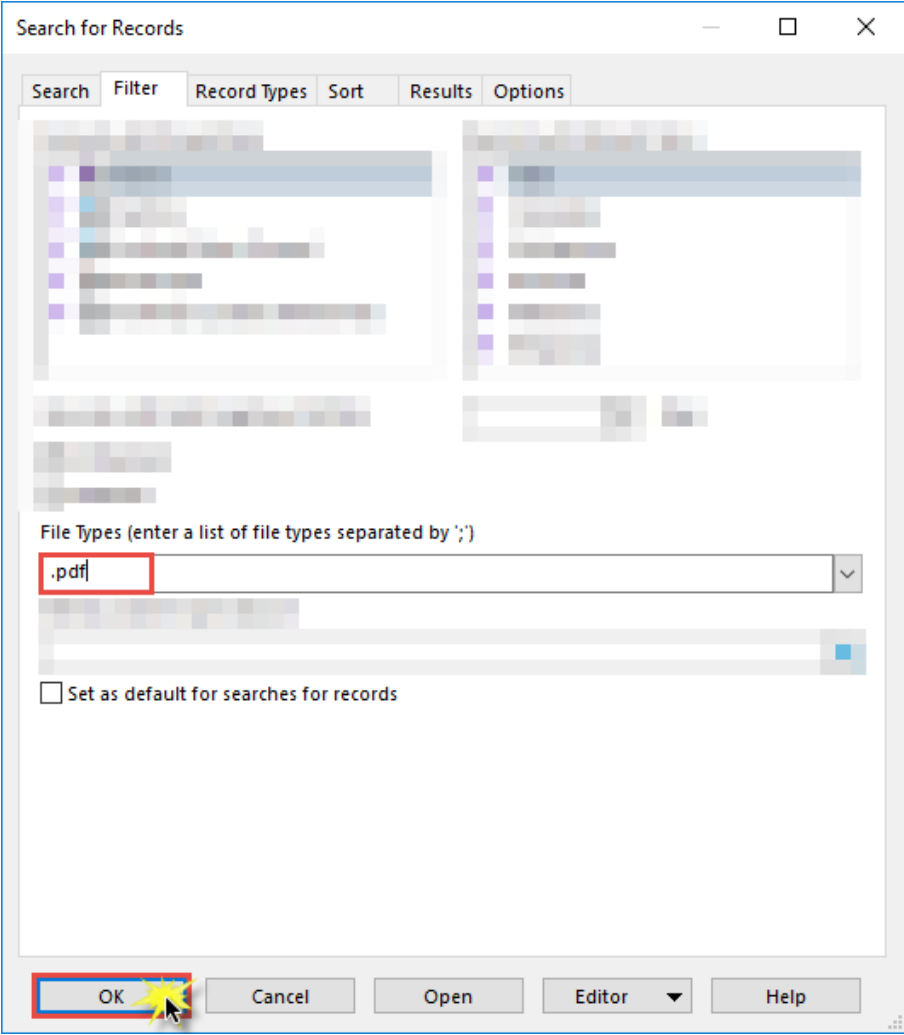
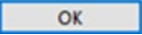

Refine a Search – Filter Option

Step	TRIM Desktop – Refine a Search – Filter Option
1.	 <p>Click on Refine Search or press the F7 key and Click on the Filter Tab</p>

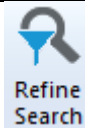
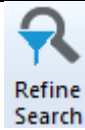


Step	TRIM Desktop – Refine a Search – Filter Option
2.	<p>The options at the top of this tab are more useful for the Records Team. However, the File Types option may help reduce the number of records in your Records List Pane.</p>  <p>The screenshot shows the 'Search for Records' dialog box with the 'Filter' tab selected. The 'File Types' field, which prompts the user to 'enter a list of file types separated by ;', is highlighted with a red rectangle. Other visible options include 'Records with Disposition' (Active, Inactive, Archived, Destroyed, Archived (Custody Transferred)), 'Records with Record Class' (Vital, Corporate, Workgroup, Personal, Reference, Temporary), 'Records with Date Registered Within' (Unfinalized, Finalized), and a 'Within another Saved Search' field. The bottom of the dialog has buttons for OK, Cancel, Open, Editor, and Help.</p>



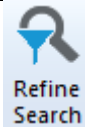
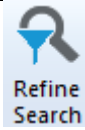
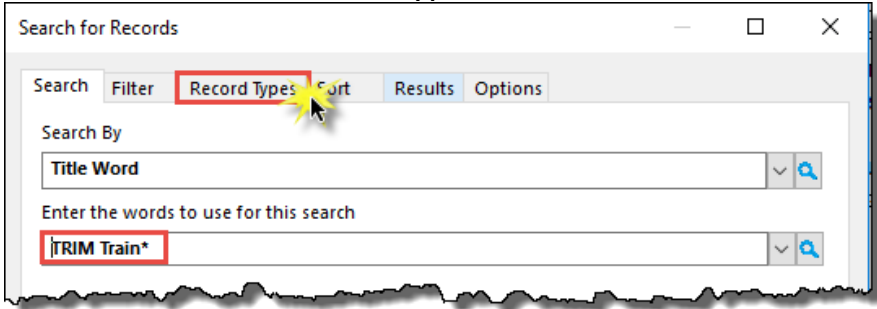
Step	TRIM Desktop – Refine a Search – Filter Option
3.	<p>Simply add the file type for the record you are look for.</p> <p>For PDF type in '.pdf'</p> <p>MS Word type in .docx</p> <p>MS Excel type in. xlxs</p> <p>In this example we will look for a PDF document</p>  <p>And Click </p>
4.	<p>Only Records that are PDFs will appear in the results</p> 

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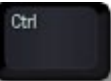

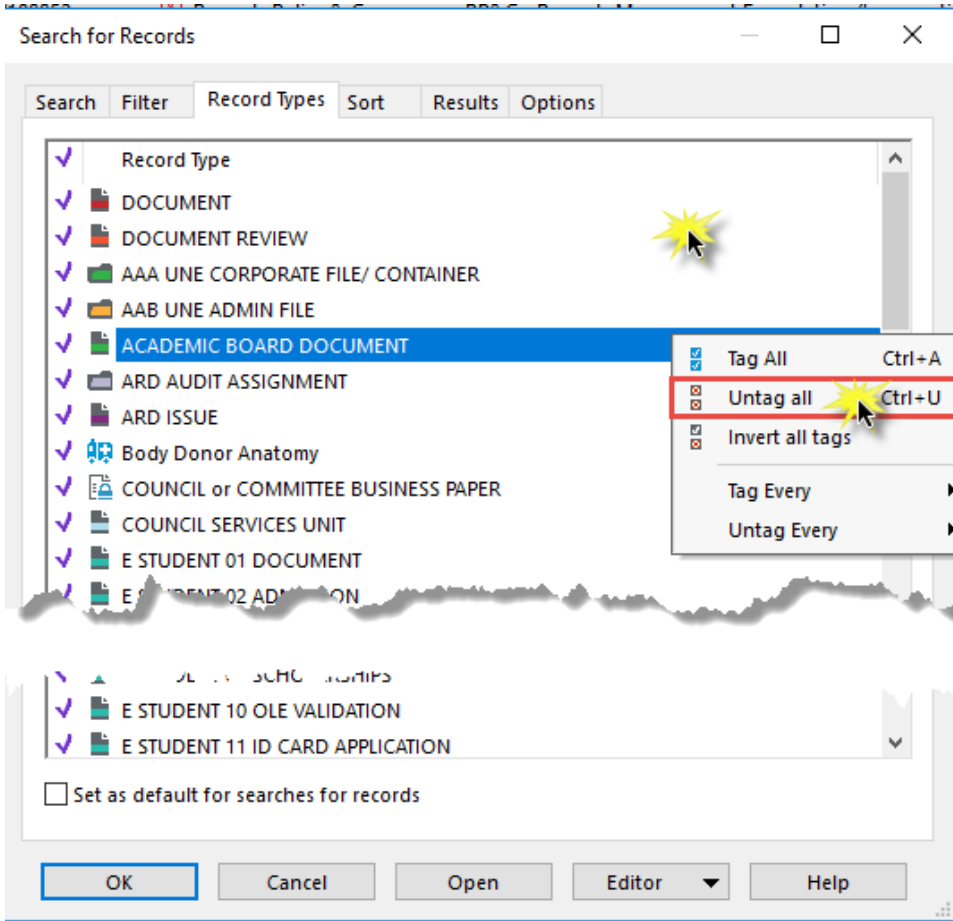

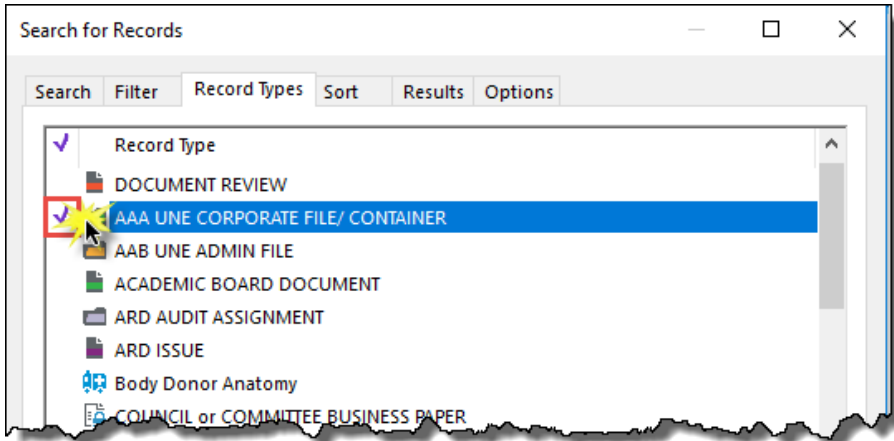
Step	TRIM Desktop – Refine a Search – Filter Option
5.	 <p>To remove this filter simply click , click on the filter Tab and remove the .pdf (or other text)</p>

Refine a Search – Record Types


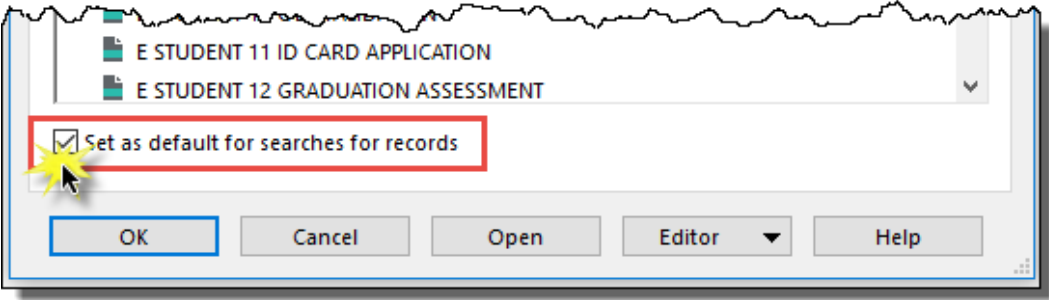
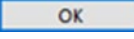
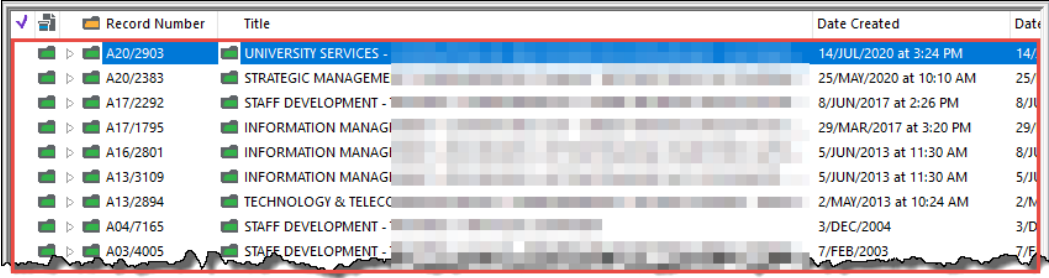
Sometimes you want to find a Container and not just one document. Using the specific Record Type really cuts down on the number of results you will receive

Step	TRIM Desktop – Refine a Search – Record Types
1.	 <p>Click on . For this search we will change the words slightly, then click on the Record Types Tab.</p> 



Step	TRIM Desktop – Refine a Search – Record Types
2.	<p>You will see a list of Records types, to select the one you want right click anywhere in the Record Type window and click on</p> <p> <input type="checkbox"/> Untag all (or  ) </p> 
3.	<p>This will clear all tags, then Tag the  AAA UNE CORPORATE FILE/ CONTAINER by clicking to the left.</p> 

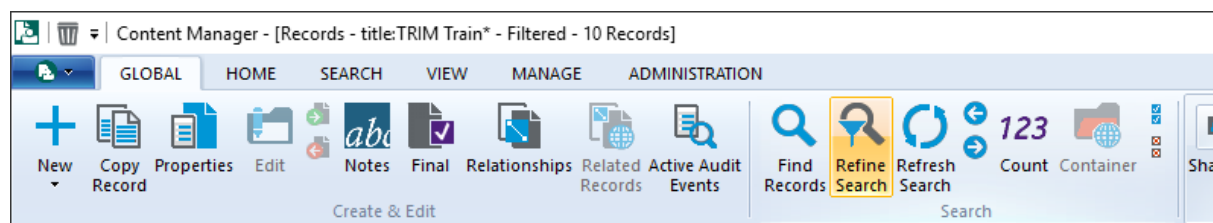



Step	TRIM Desktop – Refine a Search – Record Types
	<p>You can select as many options as you like.</p> <p>If this search selection is how you want to search in future you can click the <input type="checkbox"/> Set as default for searches for records radio button</p> 
4.	<p>Click  and the results will appear.</p> 


Navigating Searches




There are a couple of options that allow you to easily navigate to and from different searches and they are all available in the Search section of the Global Tab



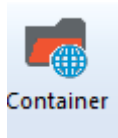
 If you have a Search open and want to see if there are any records that have now meet the search criteria click this button or press button F5

 Go Backward – return to the previous search criteria (only works while you keep the same window open)

 Go Forward – Return to later searches (only works while you keep the same window open)



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Sometimes, when you look for a Container it can be easier to find a record that has been saved to it. When this happens click on the Container Icon and the Container will open



Tag All – Allows you to Tag all records in a list, you can then create a Reference or send an email including the details of all these records.

Untag All – Remove all tags from the records in the list.

For information on the Sort, Results and Options Tabs see **Advanced Module**



Module 4 – Desktop Client – Managing Records in TRIM – Lesson 1 - Saving Records

TRIM is not only a Records Management System, it is also a Document Management system.



A document management system (DMS) is a system used to receive, track, manage and store documents and reduce paper.

https://en.wikipedia.org/wiki/Document_management_system

Because TRIM is a Document Management system and not just a storage location it offers a number of useful tools to help manage your documents. For example,

- Version (called Revision in TRIM) control
- A complete Audit trail for each record
- Renditions (Documents can be held in multiple format at the same time e.g. PDF & MS Word)
- Integration with MS Office Products – in particular MS Word & MS Outlook
- Flexible security
- Ability to Search effectively

In this Module we will be looking at the basic Document Management functionality and connecting with the options in the Global Tab and options in integrated MS Office Products like MS Word, Excel, PowerPoint etc.



TRIM integrates with ...



MS Word



Excel,



PowerPoint and

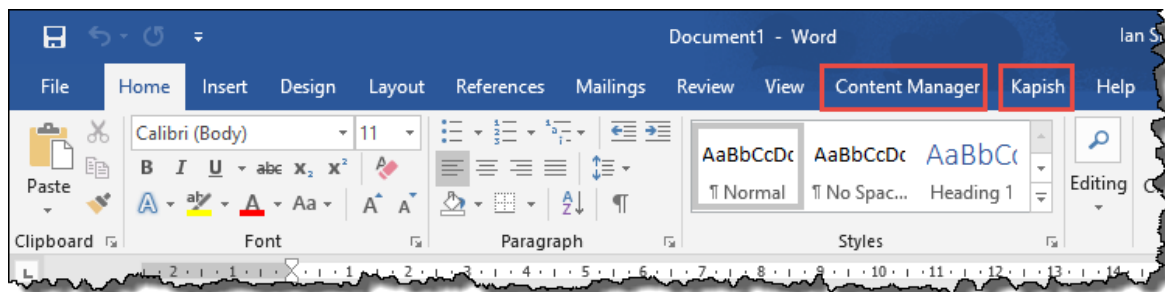


Project so it

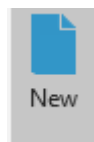
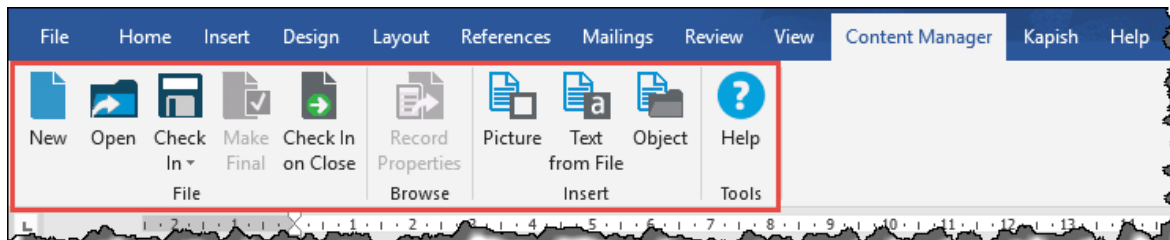
actually makes sense to create these documents in TRIM rather than create it in a share drive or your desktop.

The assumption here is that you are creating the document and it hasn't been sent to you by someone else who doesn't have TRIM.

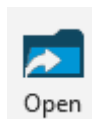
Open the MS Document type you want, you will notice that (if you have TRIM installed) there is an additional tab called 'Content Manager' – In MS Word there is a second Tab called 'Kapish' (see later in this lesson)



The Content Manager Tab has a number of options



Click to select a document template from Content Manager and create a new record based on the selected template. NB Templates are not yet available at UNE.



Open a document from Content Manager.

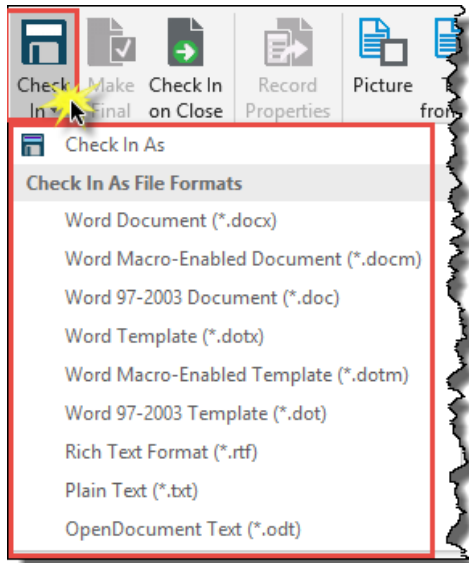


To save a document to Content Manager.

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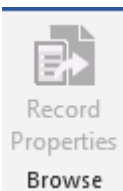
To save a document as a specific File Format



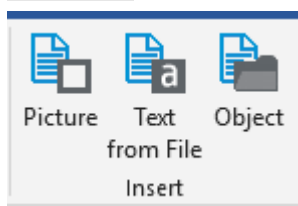
Makes this document revision the final revision



Click to automatically check the document into Content Manager when it is closed


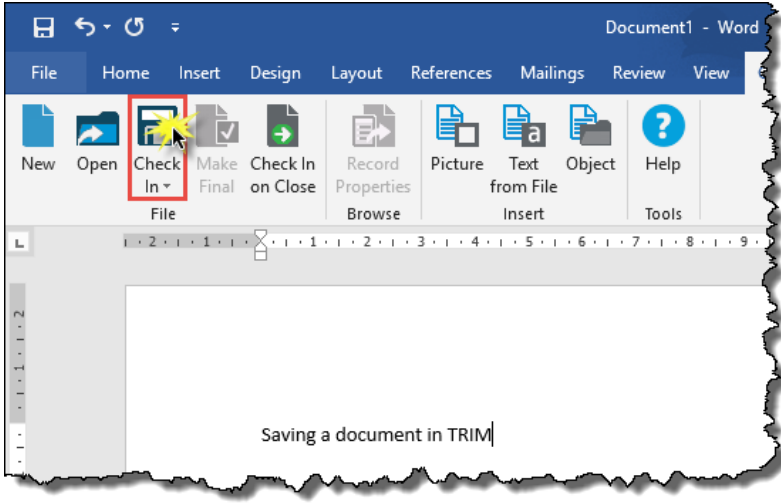
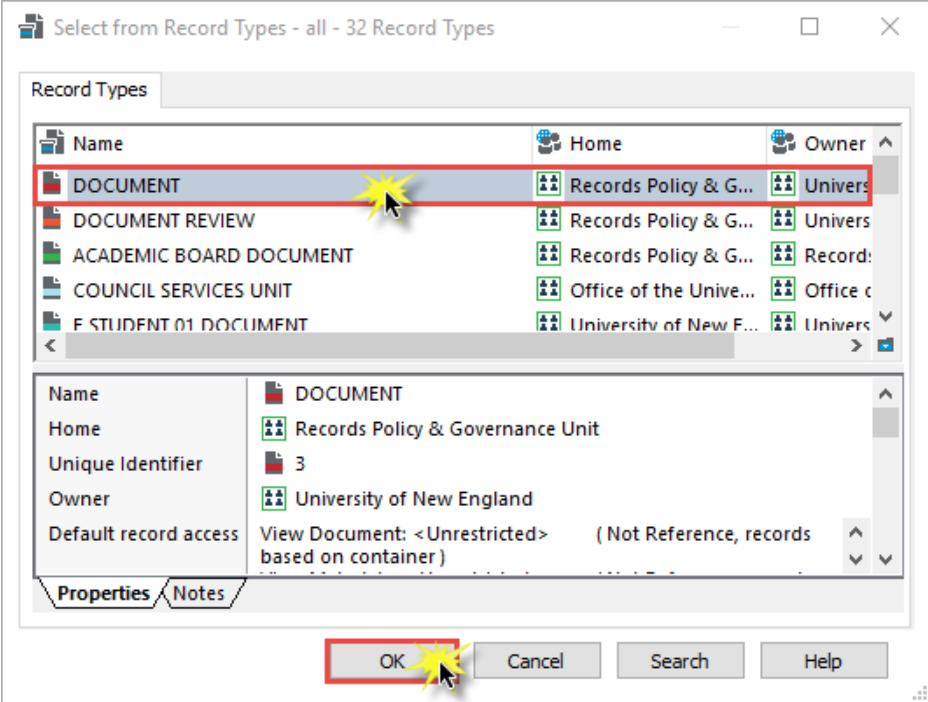


Displays the Content Manager record properties of the current document


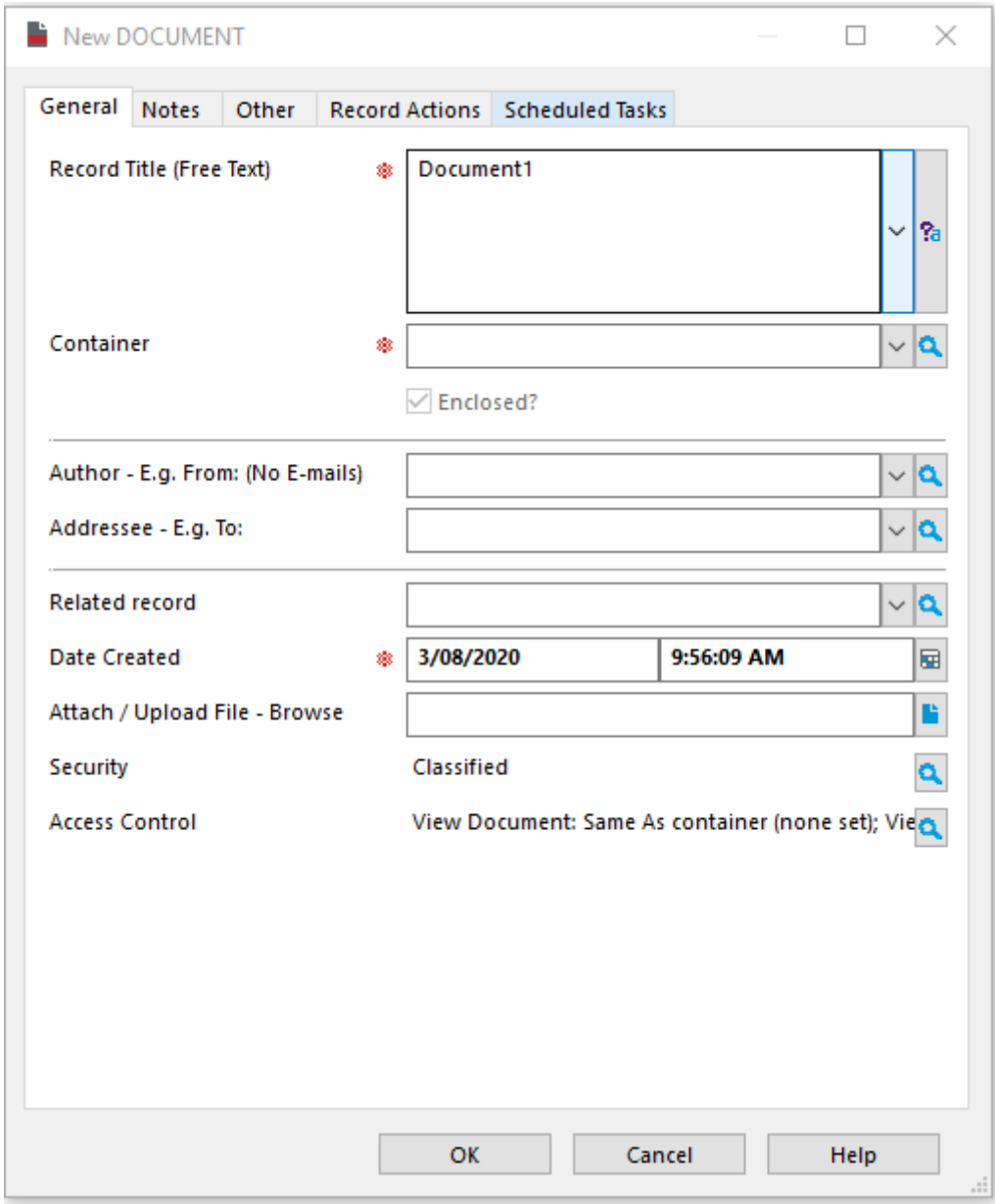


Use these icons to insert Pictures, Text and Objects saved into TRIM. Similar to the Insert options for MS Word.






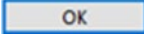

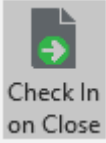
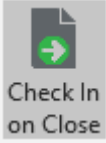


<p>Step</p>	<p>TRIM Desktop – Managing Records – Creating and Saving an MS Word/Excel/PowerPoint/Project Document</p>
	<p>You do not need to save the document to your computer or share drive first. It is better to save the document directly into TRIM so there is only one copy of the document.</p>
<p>1.</p>	<p>When you are ready click on</p>   <p>Saving a document in TRIM</p>
<p>2.</p>	<p>The select from Record Types will appear</p>  <p>For this example, we will use DOCUMENT, Click OK</p>



Step	TRIM Desktop – Managing Records – Creating and Saving an MS Word/Excel/PowerPoint/Project Document
	<p>The Record Type selected will depend on what you are creating. For many staff it will simply be the Document Record Type but if the document is about a student it may be an Estudent Record Type</p>
<p>3.</p>	<p>The New Document window will appear</p> 
<p>4.</p>	<p>Complete the Record Title using your teams agreed naming conventions in consultation with the Records Team and enter the Container Number</p>



Step	TRIM Desktop – Managing Records – Creating and Saving an MS Word/Excel/PowerPoint/Project Document
	<p>You can click on the  for all these fields to search the information you need.</p> <p>Container  <input type="text"/>  </p> <p>See Module 3 – Lesson 1 – Basic Searching</p>
5.	Click 
	<p>There are a number of other options that you can complete now or later after the record is saved</p> <ul style="list-style-type: none"> • Related Record • Security • Access Control <p>See Module 4 – Lesson 3</p>
6.	The document is now stored in TRIM
7.	<p></p> <p>You may notice that the  button has gone grey. This indicates that when you close the document it will be available to others (if they have access) to edit.</p>

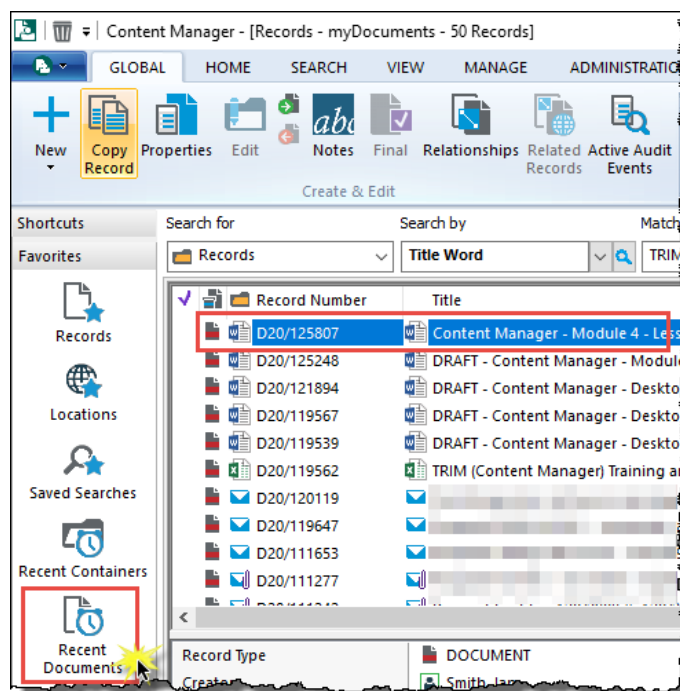


Step

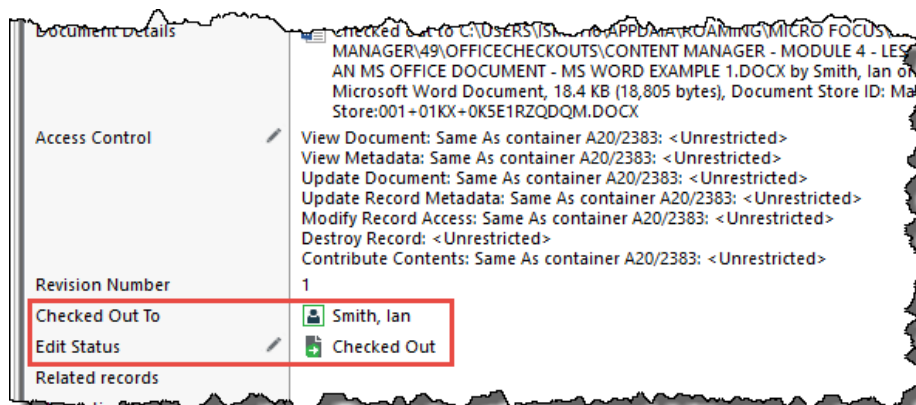
TRIM Desktop – Managing Records – Creating and Saving an MS Word/Excel/PowerPoint/Project Document




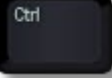

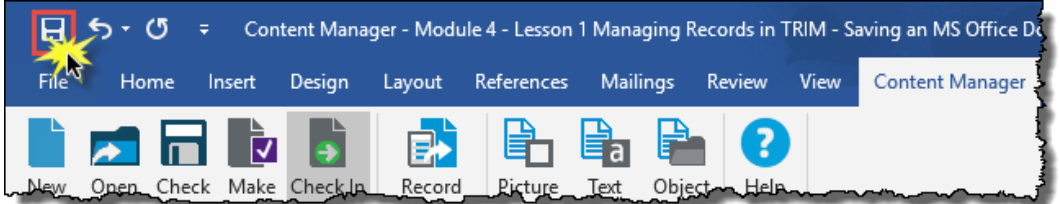

If you want to see the document you just saved in TRIM simply go to



The document will show as Checked out





Step	TRIM Desktop – Managing Records – Creating and Saving an MS Word/Excel/PowerPoint/Project Document
8.	<p>Complete editing the document, Save  or  or </p> 
9.	<p>Once closed the Edit Status in TRIM will change to  Checked In</p>



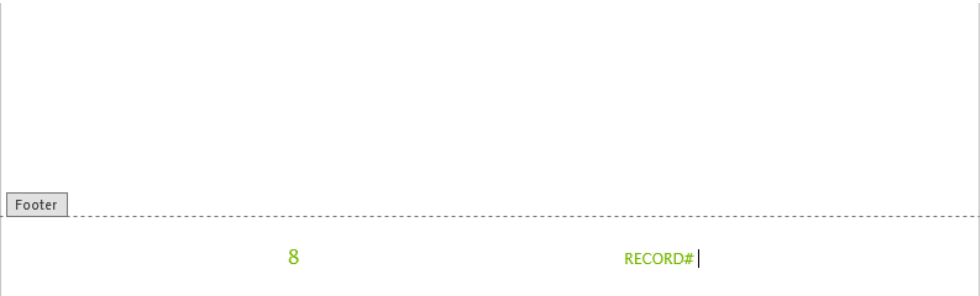
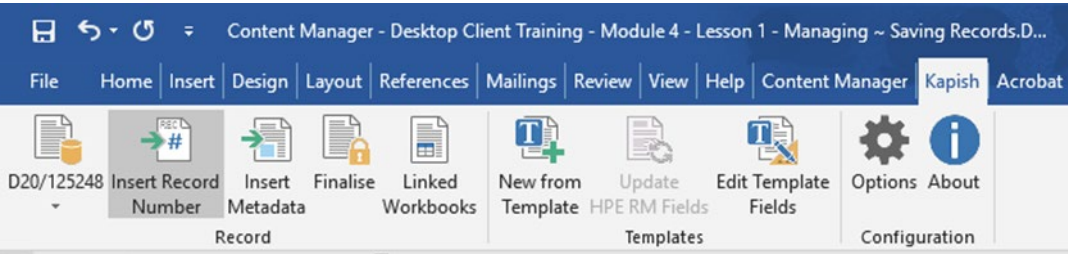
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Kapish Tab – Inserting Record Number – MS Word


The Kapish tab allows users to insert the Record Number and other Meta Data into a word Document.



Any document that is to be submitted to any UNE official body and/or to the Vice-Chancellor must have the Record Number inserted to ensure it has been saved to TRIM.

Step	TRIM Desktop – Managing Records – Kapish Tab – Inserting Record Number – MS Word
1.	<p>The Kapish/Content Manager MS Word integration allows users to insert the Record Number for that document without the need to copy from TRIM and pasting into the document.</p> <p>Select where you want to insert the Record Number - some document templates will specify a location. In this document I will insert it into the footer</p> 
2.	<p>Click on the Kapish Tab</p> 



Step	TRIM Desktop – Managing Records – Kapish Tab – Inserting Record Number – MS Word
3.	<div data-bbox="454 300 614 450">  <p>Insert Record Number</p> </div> <p>Click on</p>
4.	<p>The Number will appear in the chosen location</p> <div data-bbox="323 510 1390 795"> <div data-bbox="323 674 400 703">Footer</div> <div data-bbox="608 734 624 763">8</div> <div data-bbox="922 734 1102 763">RECORD# D20/125248 </div> </div>



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Saving a Document – Drag and Drop

Not all documents are created in Microsoft Office and sometimes documents are created by parties outside of UNE who don't have access to TRIM so we have to save the documents but we aren't actually creating them.

In this case there is a really easy way to save a document into TRIM, simply Drag and Drop.

We won't be looking at documents received by email, those will be dealt with in [Module 5 Lesson 1](#)



It is vital that documents from non-standard systems be saved in a format that will be readable in the future. Saving a document created in software which is not commonly available may not be readable in the future.

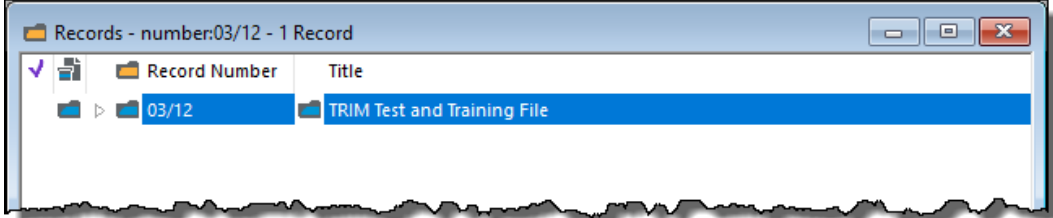
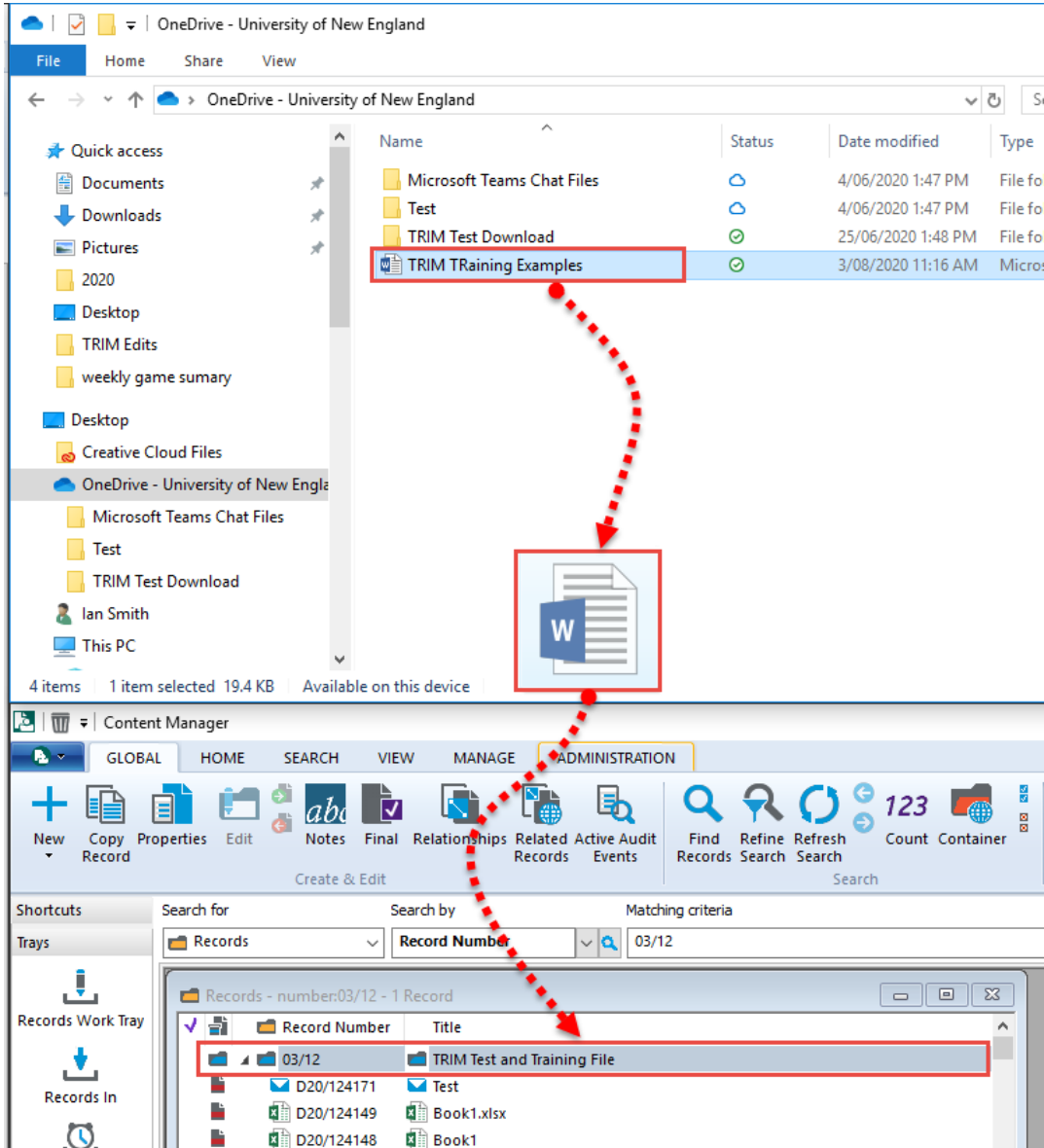
Where necessary save the document as a .pdf, .csv or similar to ensure it can be read in the future.



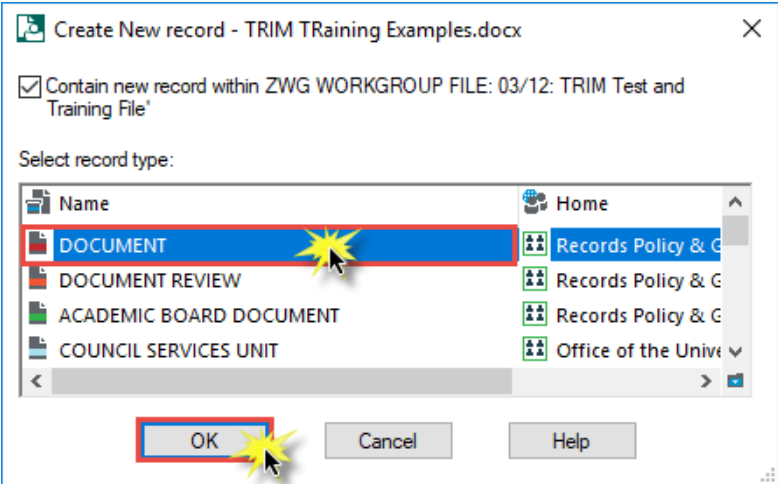
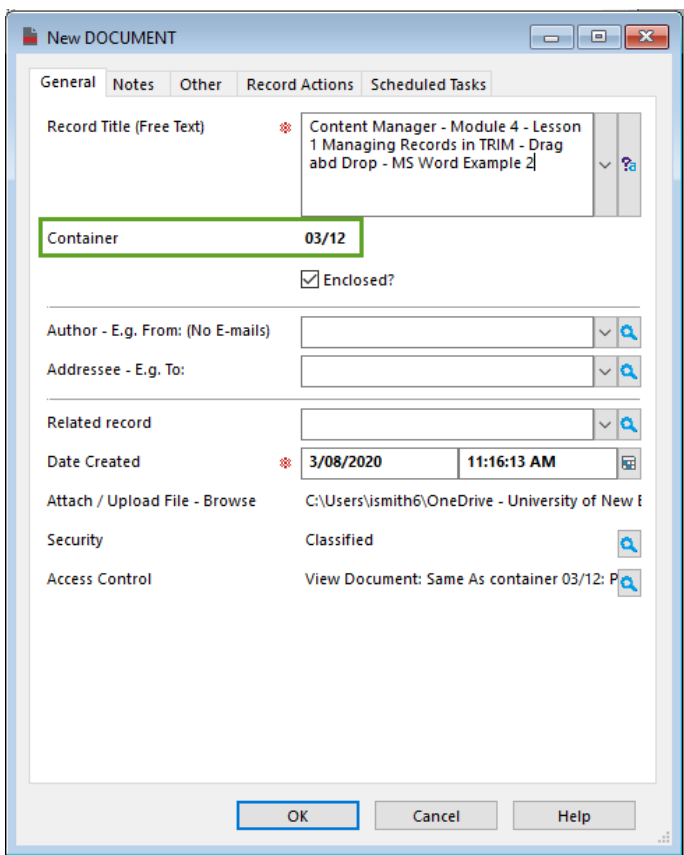
Additionally, **no document should ever be saved with password protection**. A document that cannot be opened because no one knows the password cannot be a Record. If you have concerns over the protection of the data set the appropriate security when saving into TRIM – See **Advanced Module**

Step	TRIM Desktop – Managing Records – Saving by Drag and Drop
1.	<p>Locate the document you want to save.</p> <p>It could be in UNE OneDrive, Barney (Share Drive) or your computer Desktop as long as you have TRIM on your computer</p> <p>In this example I have a Word Document saved to OneDrive which I will now move to TRIM</p>



Step	TRIM Desktop – Managing Records – Saving by Drag and Drop
2.	<p>Locate the container you need to save the document to first, in this example I will be using the TRIM Test and Training file 03/12</p> 
3.	<p>Locate the document you want to move into TRIM and simply click, drag and drop onto the Blue Bar of the container in TRIM</p> 



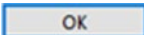

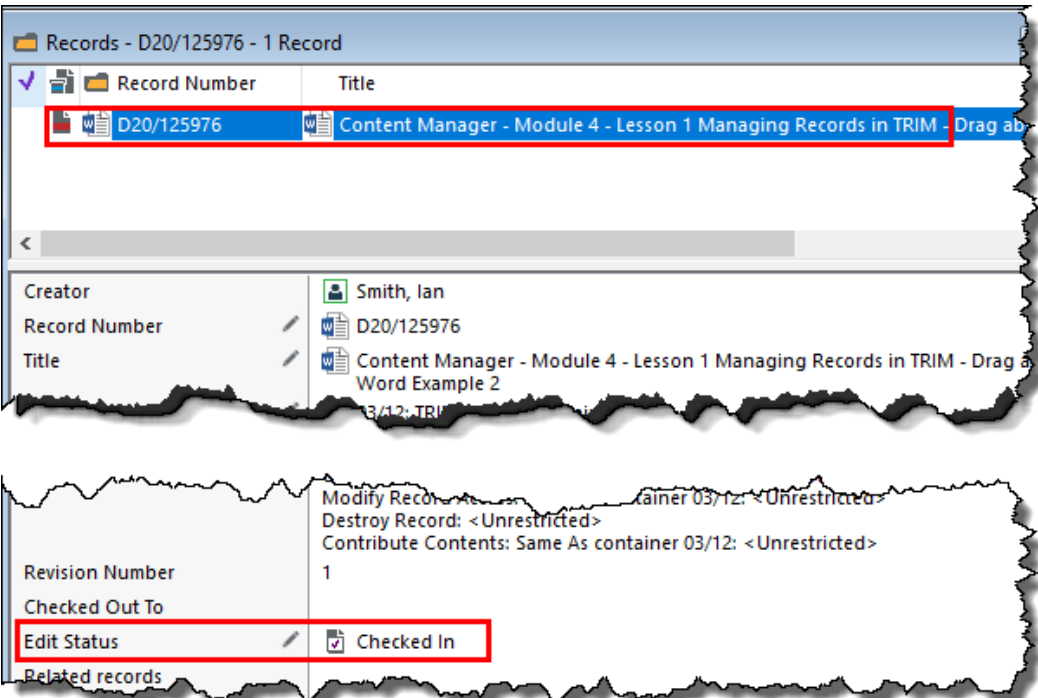


Step	TRIM Desktop – Managing Records – Saving by Drag and Drop
4.	<p>The Create New Record window will appear, select the Record Type you need to use.</p>  <p>In this example we will be using DOCUMENT, click OK</p>
5.	<p>The New Document window will then appear, complete the required fields</p>  <p>Note that the Container field has already been completed</p>

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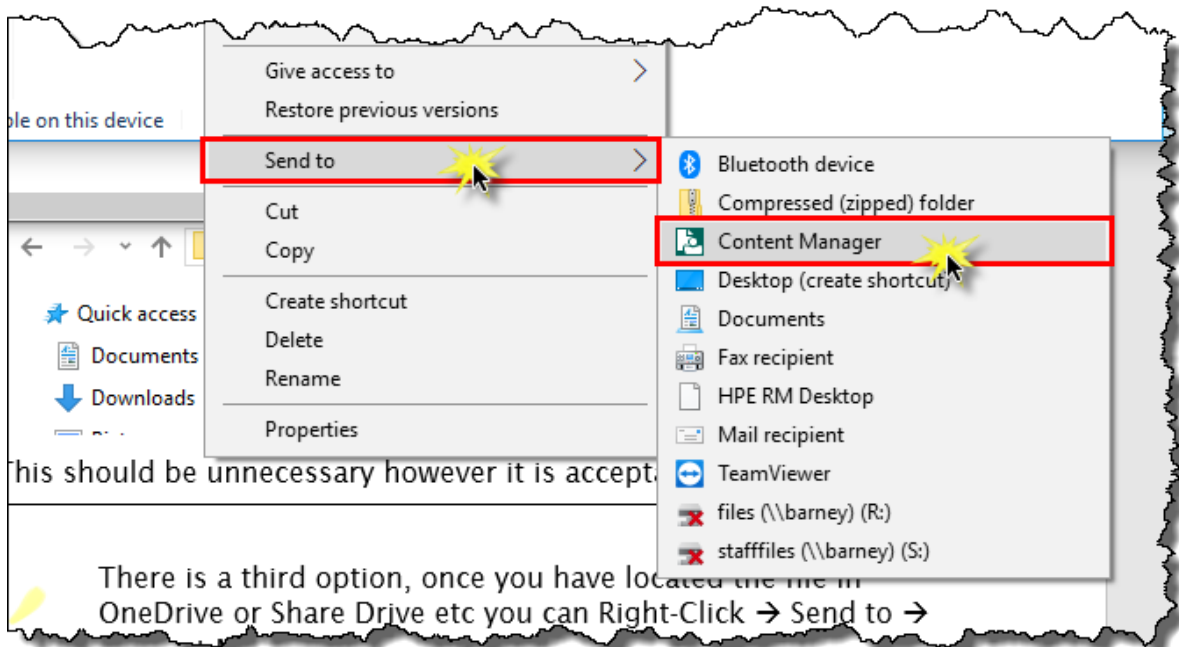
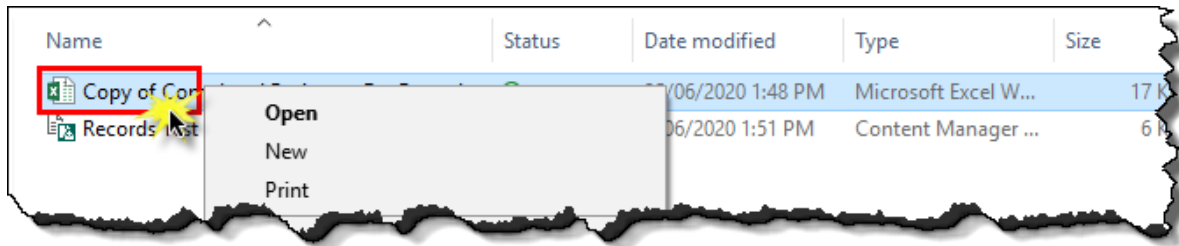
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Step	TRIM Desktop – Managing Records – Saving by Drag and Drop
6.	<p>Complete the Record Title using your teams agreed naming conventions in consultation with the Records Team and click</p> <p></p>
	<p>There are a number of other options that you can complete now or later after the record is saved</p> <ul style="list-style-type: none"> • Related Record • Security • Access Control <p>See Module 4 - Lesson 3</p>
7.	<p>The document is now stored in TRIM and a window will appear displaying the record number and the Edit Status will be</p> 
 	<p>Drag and Drop will not remove the file from the location it was saved from.</p> <p>It is good practice to delete the record from its original location to ensure there is only ever one copy of the document</p> <p>If you are nervous about deleting the document you can create an Archive folder in the file location where records that have been saved to TRIM can be stored.</p>



There is a third option, once you have located the file in OneDrive or Share Drive etc you can Right-Click → Send to → Content Manager.





Module 4 – Desktop Client – Managing Records in TRIM – Lesson 2 – Updating Records

Because TRIM is a Document Management System as well as a Record Management System it is really fantastic at managing a record once it is in TRIM.



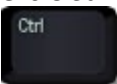

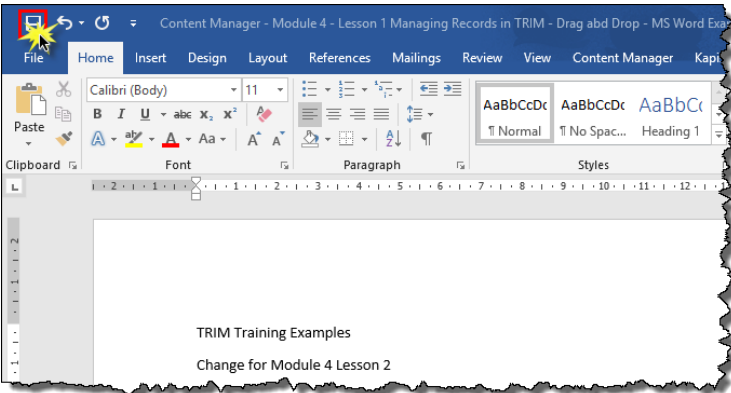
In this lesson we will look at how to update a document in TRIM, see **Module 4 - Lesson 3** for how to update the records Meta Data (Title, Security etc)

There are 2 options for updating documents in TRIM

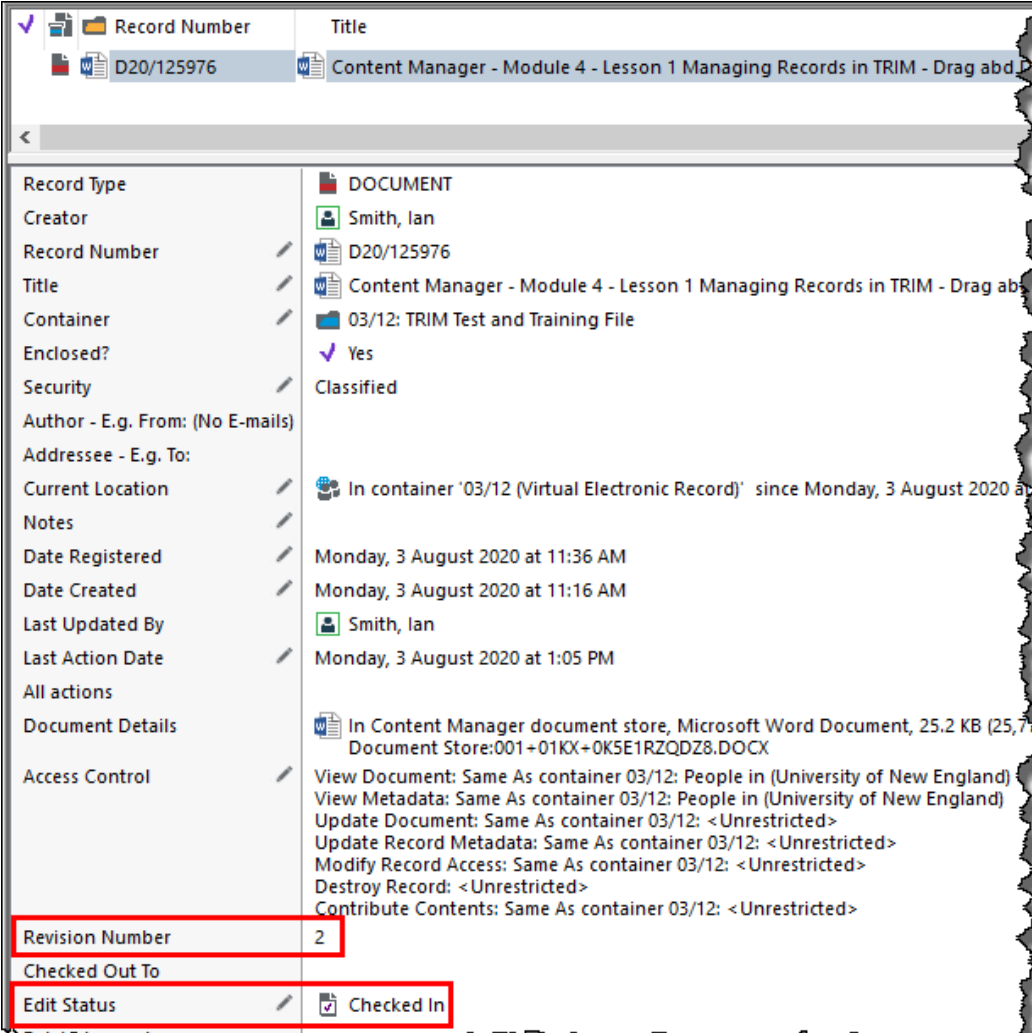

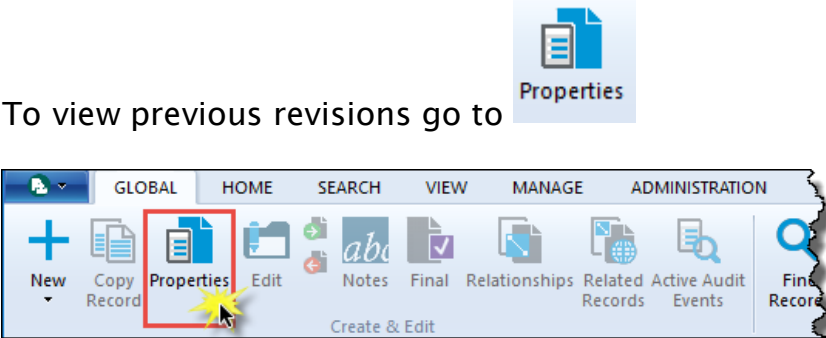
1. Edit; or
2. Check Out

The Records Team recommends Edit for short term changes (i.e. Open, make change and close) and Check out for longer changes such as major updates (e.g. overnight)

Updating and Saving Changes to a Document in TRIM (Option 1 – Edit)

Step	TRIM Desktop – Managing Records – Updating and Saving Changes to a Document in TRIM
1.	<p>Locate the document you need to update and click on </p>
2.	<p>The document will open. Make the required changes click Save </p> <p>or   and close the document.</p> 



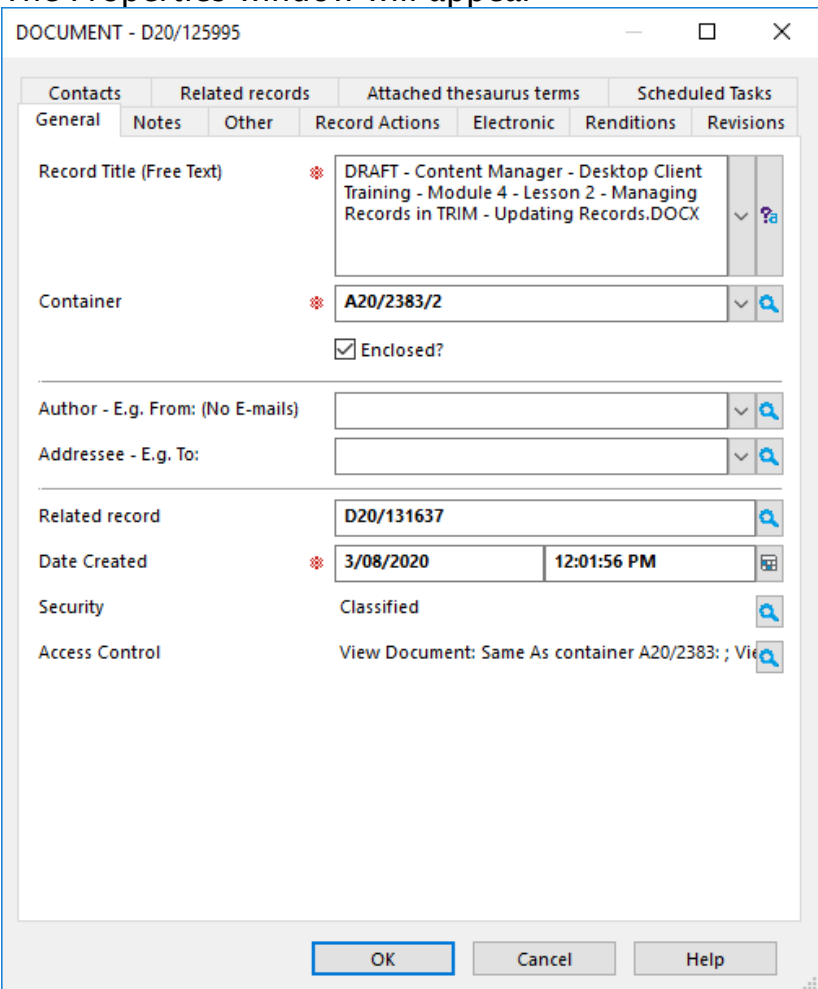
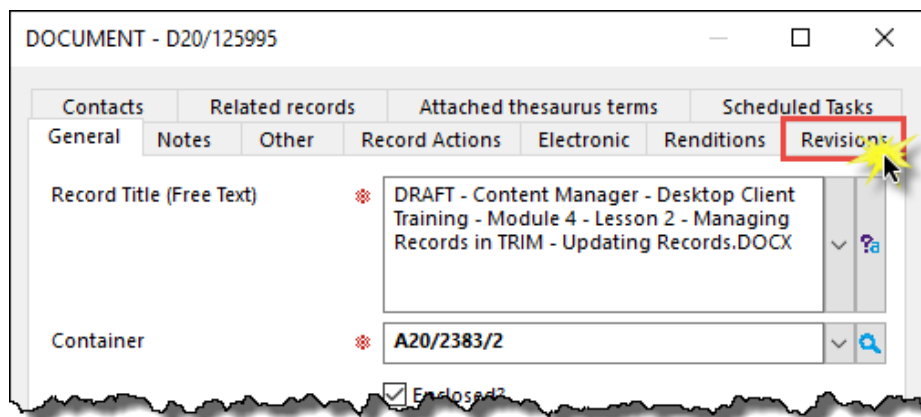
Step	TRIM Desktop – Managing Records – Updating and Saving Changes to a Document in TRIM
3.	<p>TRIM will automatically update and the document is now Revision 2 and its Edit Status is Checked In</p> 
	<p>In this example the Meta Data shows that we are up to Revision Number 2.</p> <p>The current Revision is always the one that appears in the Records List Pane.</p>
4.	<p>To view previous revisions go to</p> 

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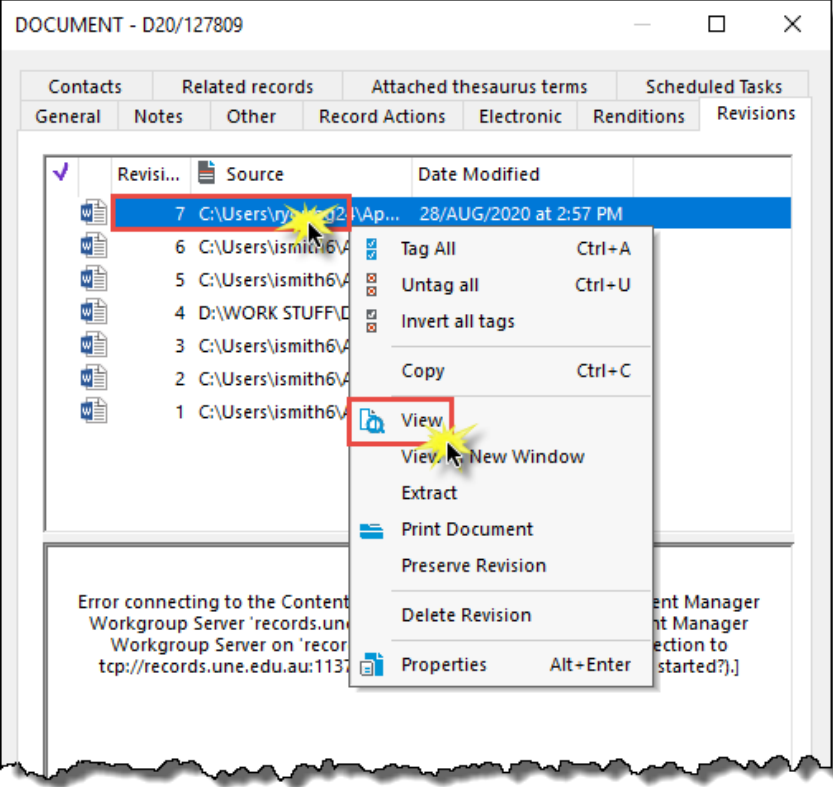
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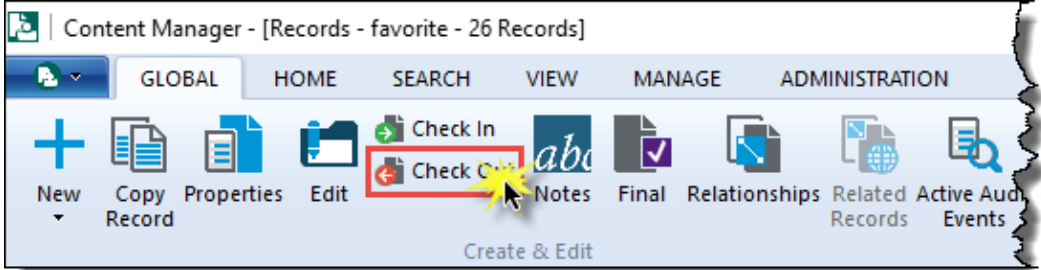
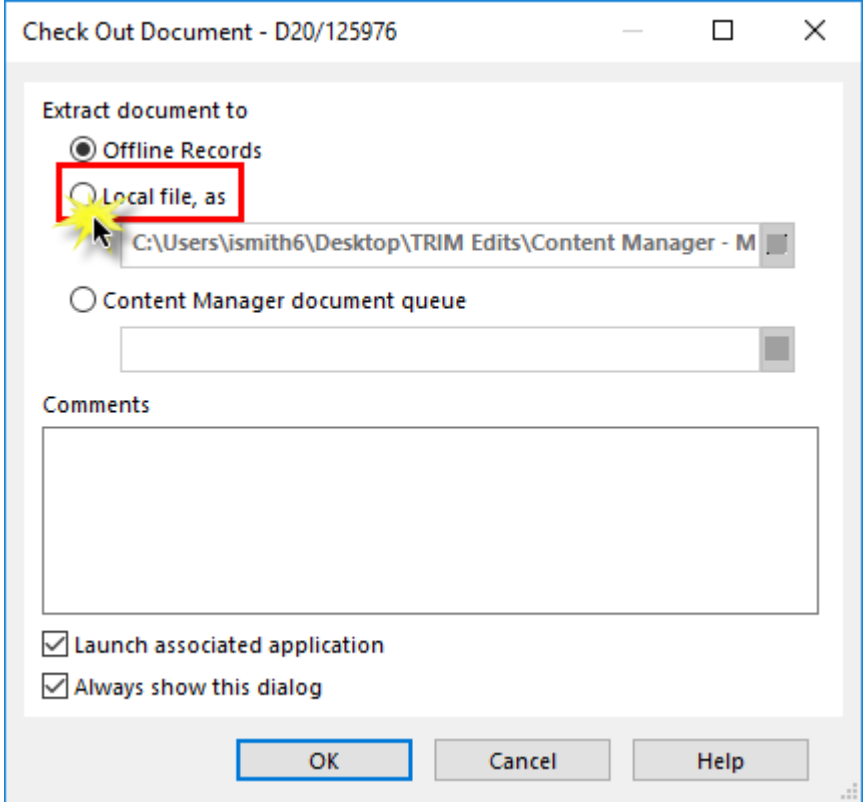
Step	TRIM Desktop – Managing Records – Updating and Saving Changes to a Document in TRIM
5.	<p>The Properties window will appear</p> 
6.	<p>Click on the Revisions Tab</p> 





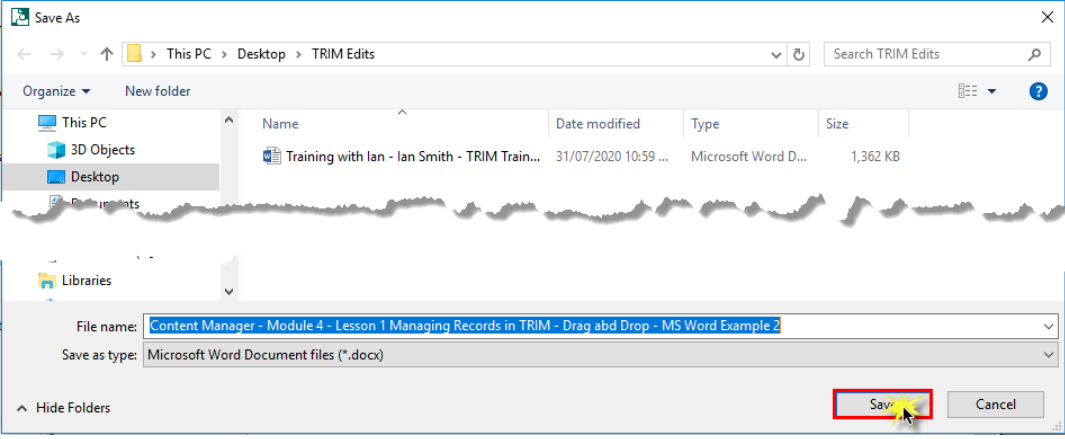
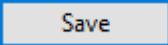

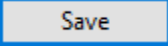

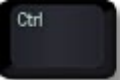


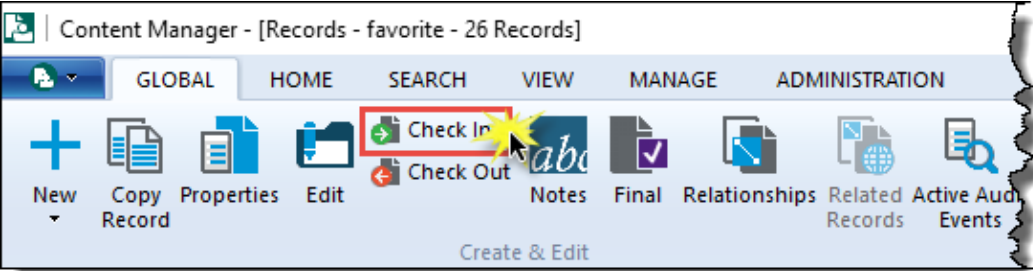
Step	TRIM Desktop – Managing Records – Updating and Saving Changes to a Document in TRIM
7.	<p>The list of previous Revisions will appear, you can preview each one or open a Read Only copy by right clicking on the Revision you wish to see and click  View</p>  <p>Error connecting to the Content Workgroup Server 'records.une.edu.au' on 'tcp://records.une.edu.au:1137'.</p>

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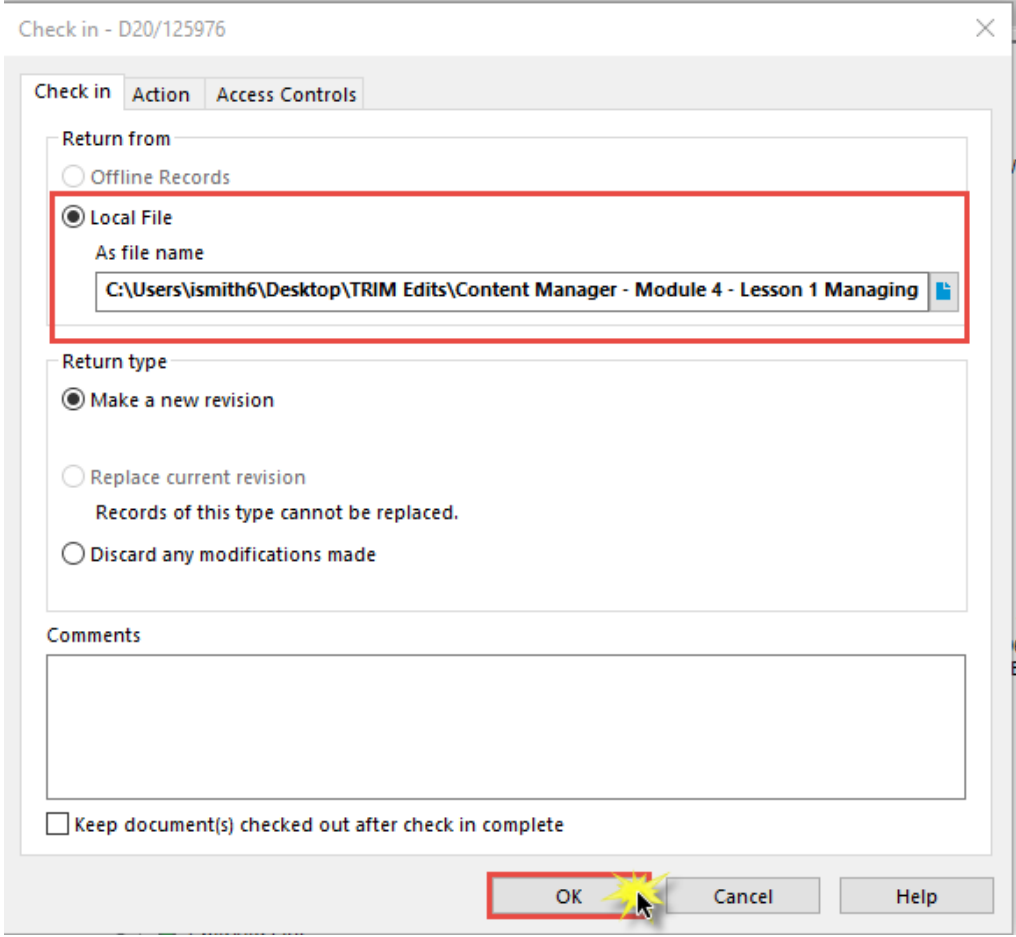



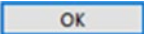
Updating and Saving Changes to a Document in TRIM (Option 2 – Check Out)

Step	TRIM Desktop – Managing Records – Saving by Drag and Drop
1.	<p>Locate the document you want to update.</p> <p>Click Check Out </p> 
2.	<p>The Check Out Document Window will appear, Select <input checked="" type="radio"/> Local file, as</p> 



Step	TRIM Desktop – Managing Records – Saving by Drag and Drop
3.	<p>You can now select where you would like the Document to be while it is outside of TRIM, click on </p> <p><input checked="" type="radio"/> Local file, as</p> <p>C:\Users\ismith6\Desktop\TRIM Edits\Content Manager - M </p>  <p>Click </p>
	<p>The Records Team recommends that you have a specific folder on your desktop or in One Drive.</p> <p>It will make it easier to manage your records if you have one place for where you edit.</p>
4.	<p>Ensure that you have ticked <input checked="" type="checkbox"/> Launch associated application , click </p>
5.	<p>The document will open. Simply make the changes needed and then</p> <p>Click  or  </p>
6.	<p>The document has been saved to the holding location. You now need to check it back in.</p>
7.	<p>Again, find the document in TRIM and Click on Check in </p> 




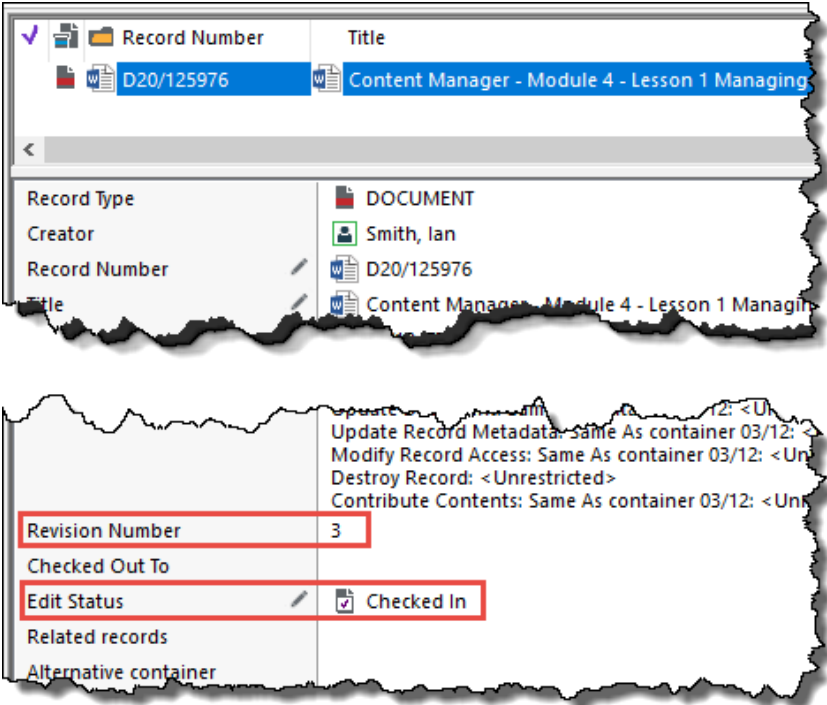

Step	TRIM Desktop – Managing Records – Saving by Drag and Drop
8.	<p>The Check In window will appear, it should default to  Local File and it will remember where you saved the document.</p> 
	<p>If you move the file you will have to either move it back to its original location or use the  to find it again.</p>
9.	<p>The Return Type should default to  Make a new revision . You can add Comments regarding the changes if needed.</p> <p>Click </p>

Records, Policy & Governance

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Step	TRIM Desktop – Managing Records – Saving by Drag and Drop
10.	<p>The document will now have an Edit Status of  Checked In and will increase the Revision Number by one more.</p> 
	<p>The Records Team highly recommends that you delete (or Archive) the file from where you had it stored while editing.</p>

Records, Policy & Governance

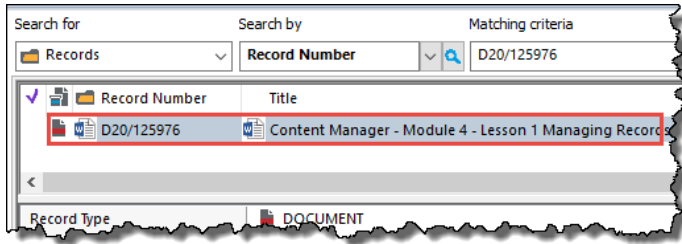

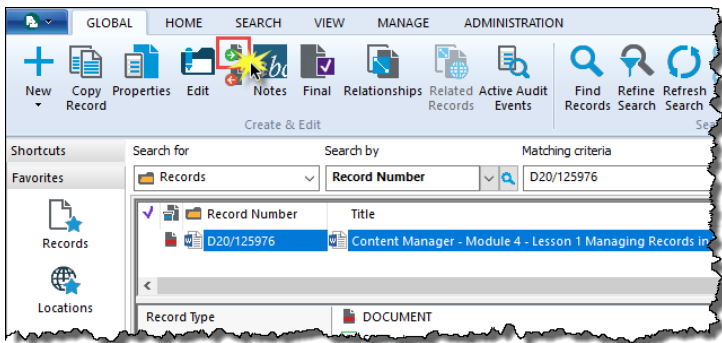
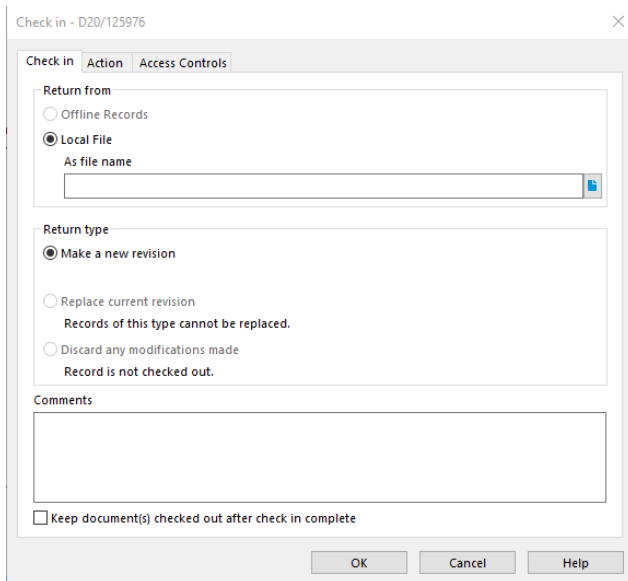
TRIM – Content Manager

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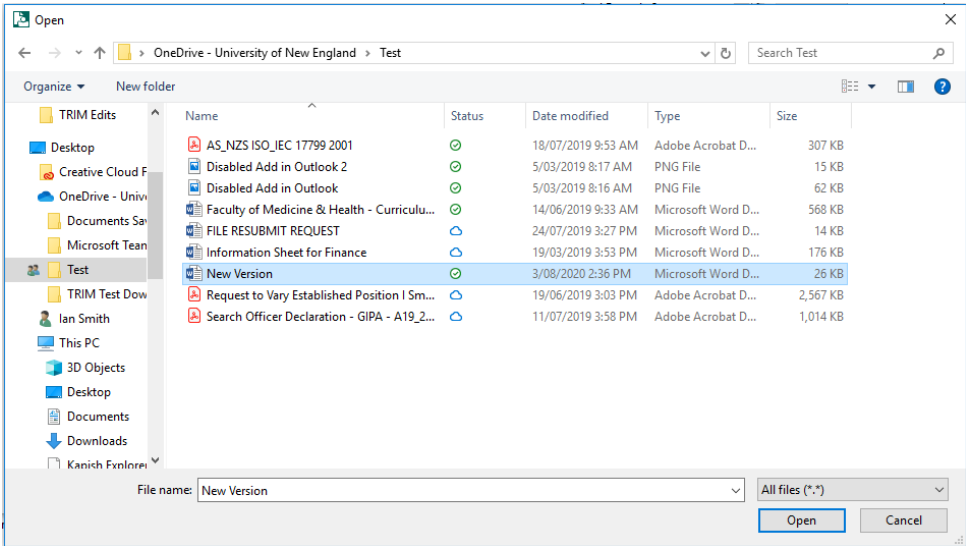


Saving a new Revision (External) in TRIM (Option 1 – Check In)

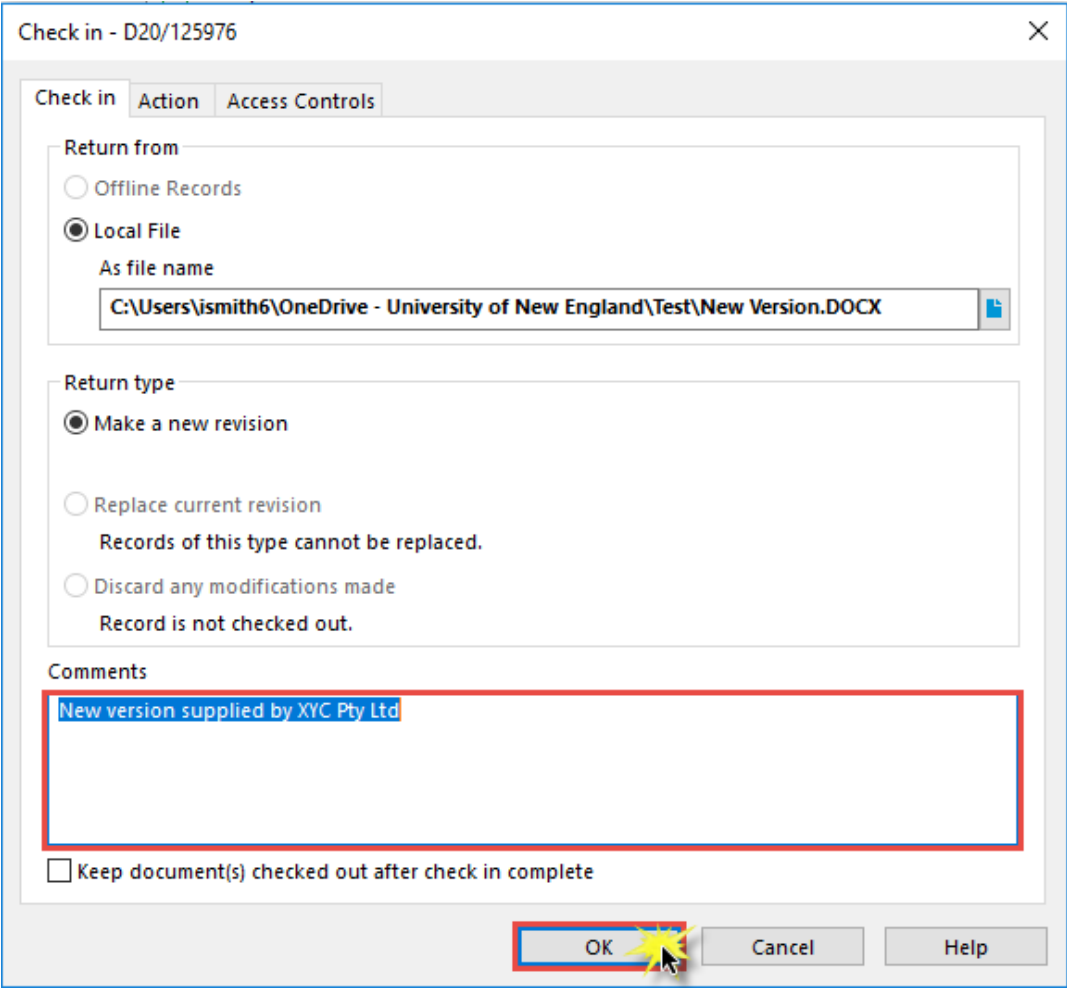
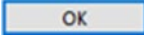
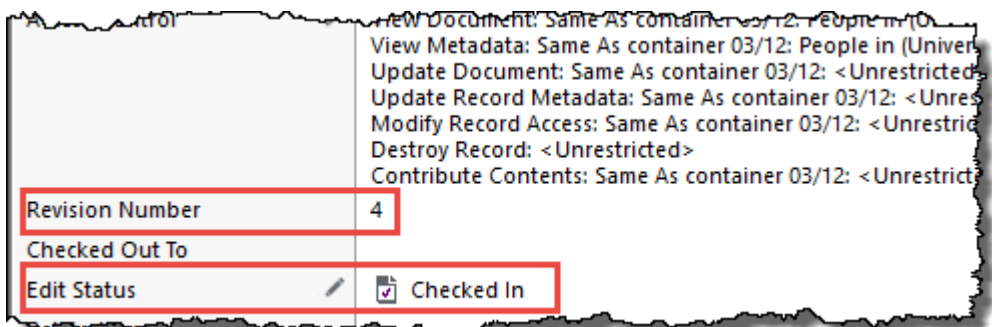
Sometimes a document is updated outside of TRIM. For instance, a document created by an external party who doesn't have access to TRIM wants to save an updated version.

Step	TRIM Desktop – Managing Records – Saving a new Revision in TRIM (Option 1 – Check In)
1.	<p>Locate the document you want to update.</p> 
2.	<p>Click the Check in button </p> 
3.	<p>The Check in Window will appear</p> 



Step	TRIM Desktop – Managing Records – Saving a new Revision in TRIM (Option 1 – Check In)
4.	<p>Click on  to locate the document</p>  <p>Select the document from the relevant location...</p> 

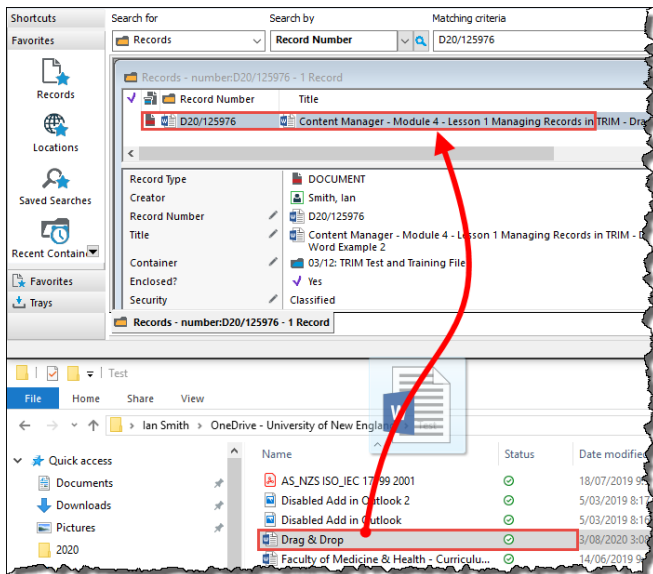

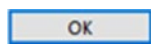
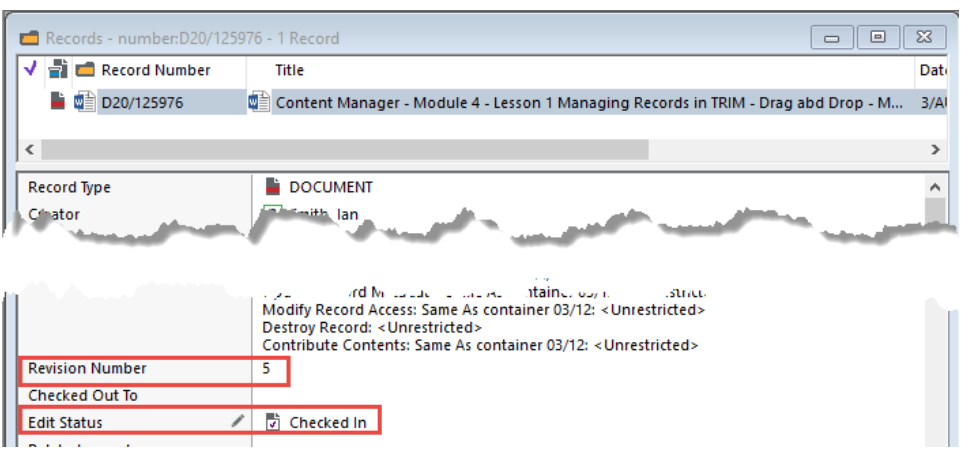


Step	TRIM Desktop – Managing Records – Saving a new Revision in TRIM (Option 1 – Check In)						
5.	<p>Once you have selected the document, add Comments as needed</p>  <p>Click </p>						
6.	<p>The Revision Number will increase by one</p>  <table border="1"> <tr> <td>Revision Number</td> <td>4</td> </tr> <tr> <td>Checked Out To</td> <td></td> </tr> <tr> <td>Edit Status</td> <td>Checked In</td> </tr> </table>	Revision Number	4	Checked Out To		Edit Status	Checked In
Revision Number	4						
Checked Out To							
Edit Status	Checked In						



Saving a new Revision (External) in TRIM (Option 2 – drag and Drop)

You can simply drag and drop your document onto the existing record in TRIM to create a new Revision

Step	TRIM Desktop – Managing Records – Saving a new Revision in TRIM (Option 3 – Drag and Drop)
1.	Locate the document you want to update.
2.	<p>Click on the file you want to load as the new revision and drag and drop onto the blue bar for the Record in TRIM</p> 
	<p>You can also drag and drop an attachment from Outlook onto a record to create a new Revision</p>
3.	<p>The Check in Window will appear and will default to <input checked="" type="radio"/> Make a new revision add comments as needed and click </p>
4.	<p>The Revision Number will increase by one</p> 



Module 4 – Desktop Client – Managing Records in TRIM – Lesson 3 – Updating Basic Meta Data

TRIM holds a lot of information (or Meta Data) about the record. Sometimes this information has to change or needs to be viewed in a more granular way.

In this lesson we will look at...

- 💡 Change of Title
- 💡 Change of Container (moving from one container to another)
- 💡 Viewing/Adding Notes
- 💡 Remove a Record (send to Recycle Bin)
- 💡 Labels and Explorer
- 💡 Related Records
- 💡 Sharing from TRIM
 - 💡 References
 - 💡 Email from TRIM
- 💡 Creating Sub Folders

It's important to remember that your permissions in TRIM will determine what you will have access to change/update. If you do have trouble making changes contact the Records Team for assistance

Change of Title



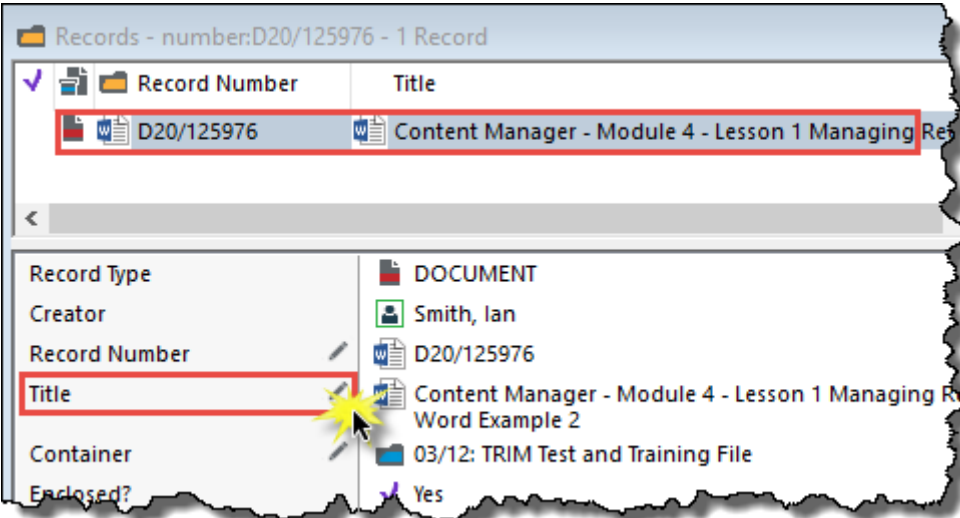
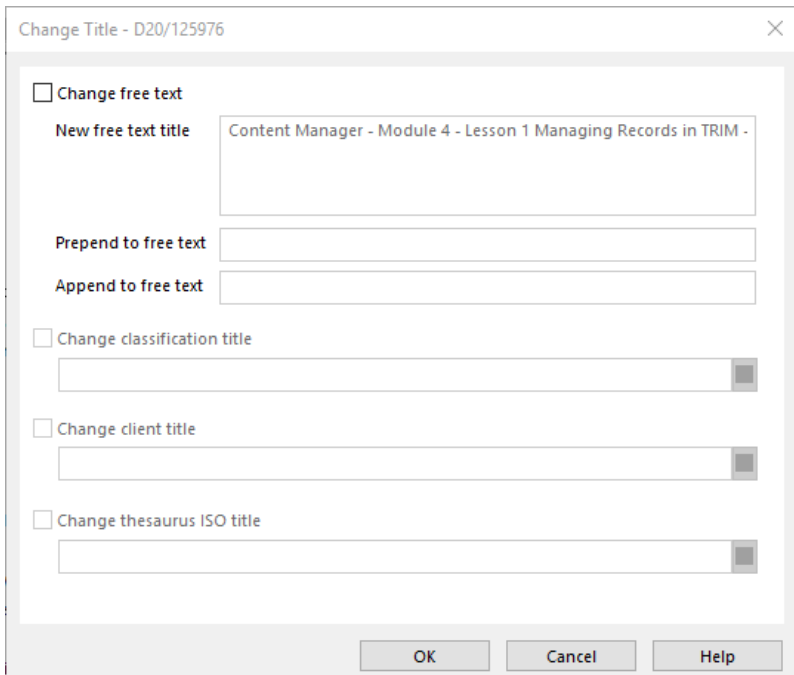
Sometimes we name a document and realise it could be improved later. If you do need to update the Title of a Document you can generally do this yourself.



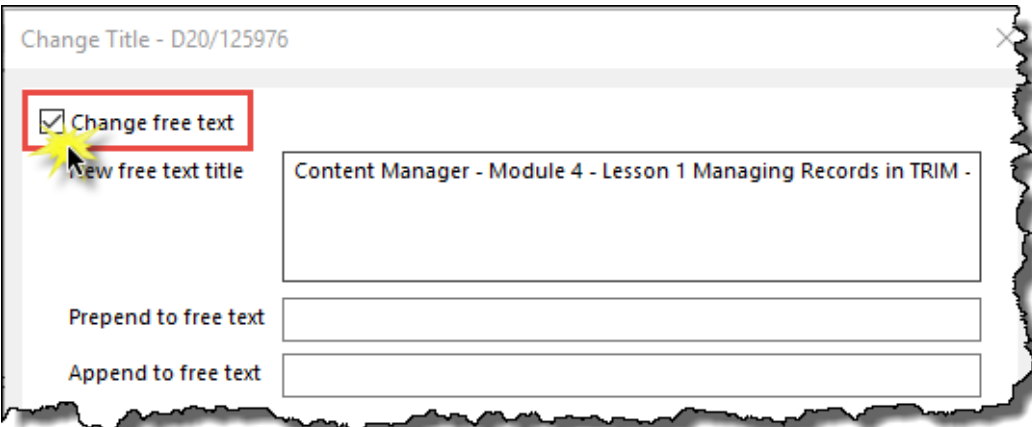

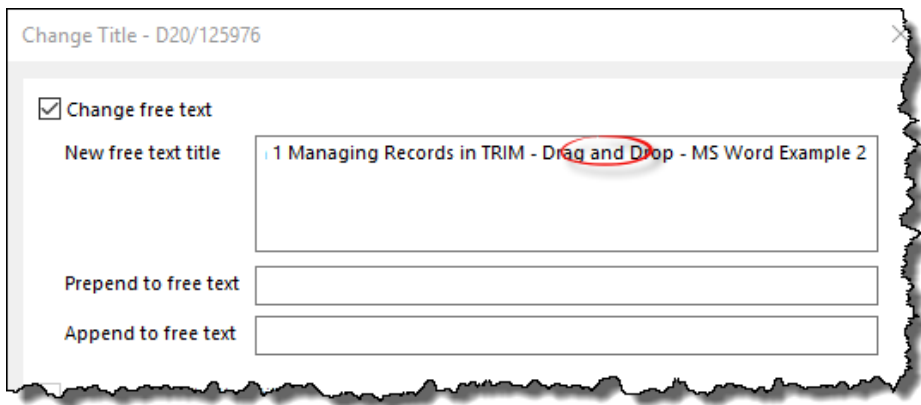

Do not change names on a Corporate Container without first discussing with the Records Team.

There are specific naming conventions that we need to follow and it's possible that we would also have to update the Retention Schedule.

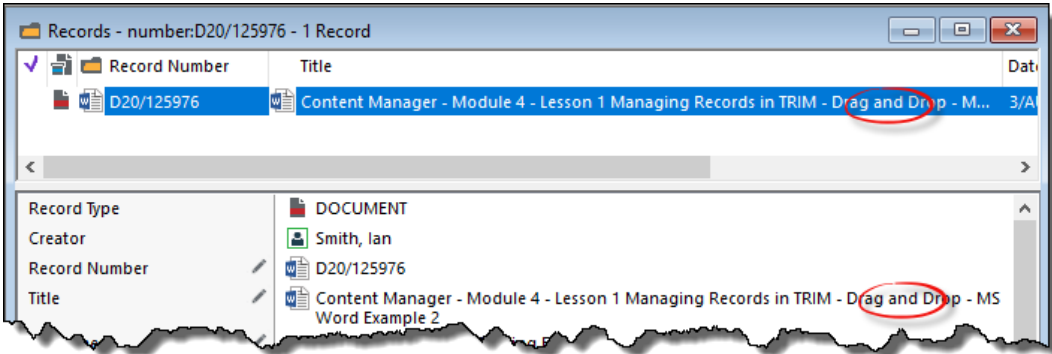


Step	TRIM Desktop – Managing Records – Updating Basic Metadata – Change of Title
1.	Locate the document you need to update
2.	<p>There is a typo in the title and it needs to be fixed. You will notice that some of the fields in the Meta Data have little pencil icons . This tells you that you can edit these fields.</p> <p>Click on the  for Title.</p> 
3.	<p>The Change Title window will appear</p> 



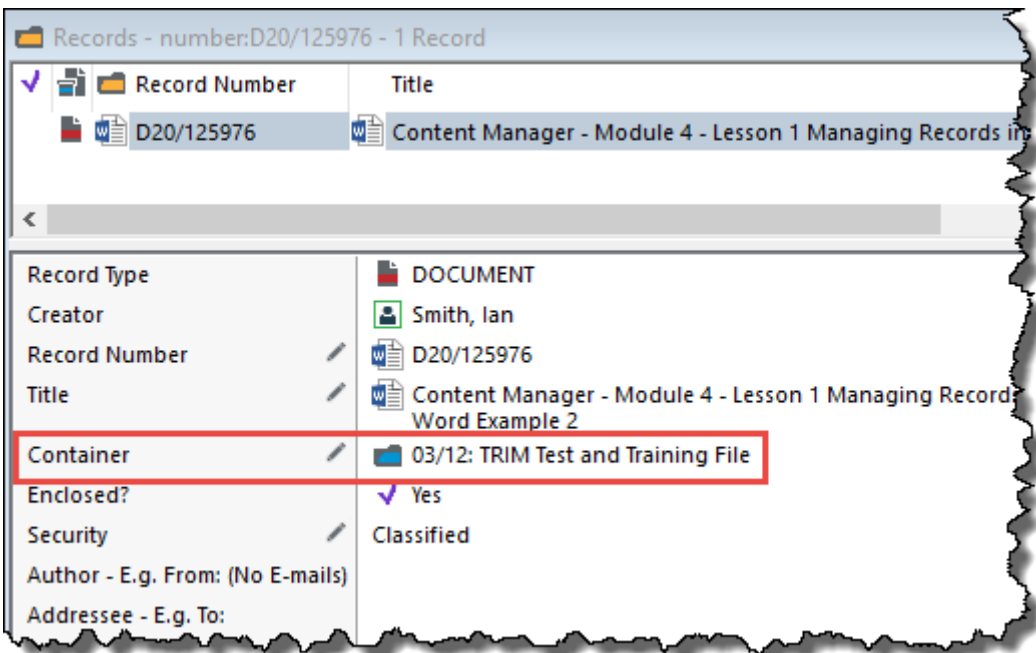


Step	TRIM Desktop – Managing Records – Updating Basic Metadata – Change of Title
4.	<p>Click the <input type="checkbox"/> Change free text tick box, the New Free text Title field will become active</p> 
	<p>If you are adding words just to the beginning of the title use the <i>Prepend to free text</i> field and if you are adding something to the end of the title only, use the <i>Append to free text</i> field.</p> <p>Prepend to free text <input type="text"/></p> <p>Append to free text <input type="text"/></p>
5.	<p>Make the change. In this case I have fixed the word 'abd' to be correct as 'and'</p> 
	<p>I could use the ampersand '&' instead</p>
6.	<p>Click <input type="button" value="OK"/></p>





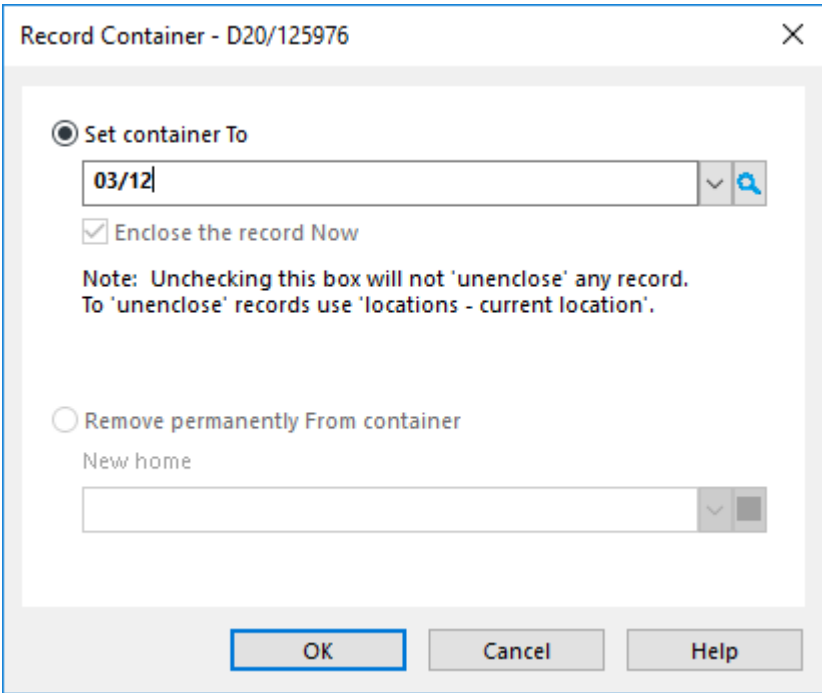
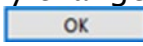
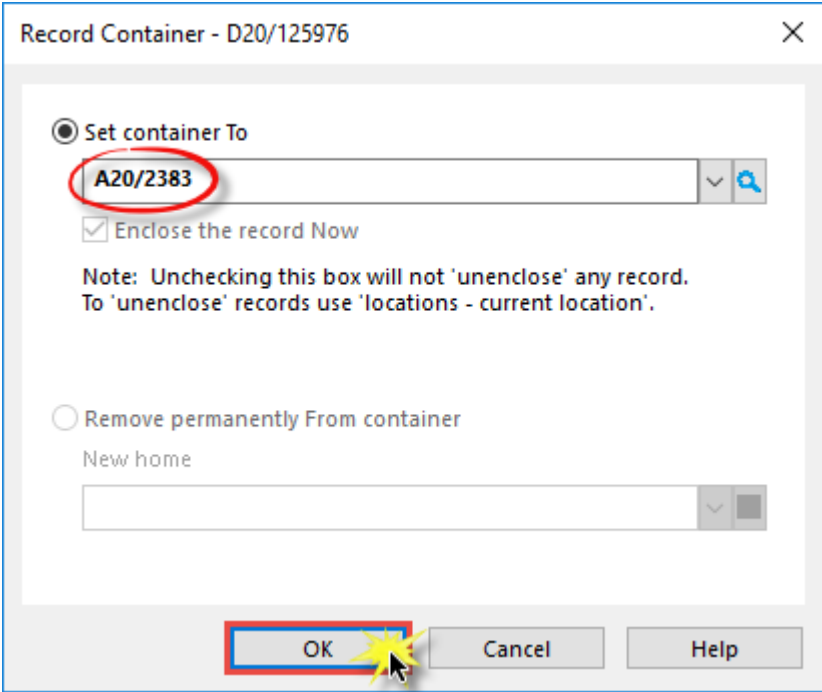
Step	TRIM Desktop – Managing Records – Updating Basic Metadata – Change of Title
7.	<p>The title has now been updated</p> 

Change Container location of a Record

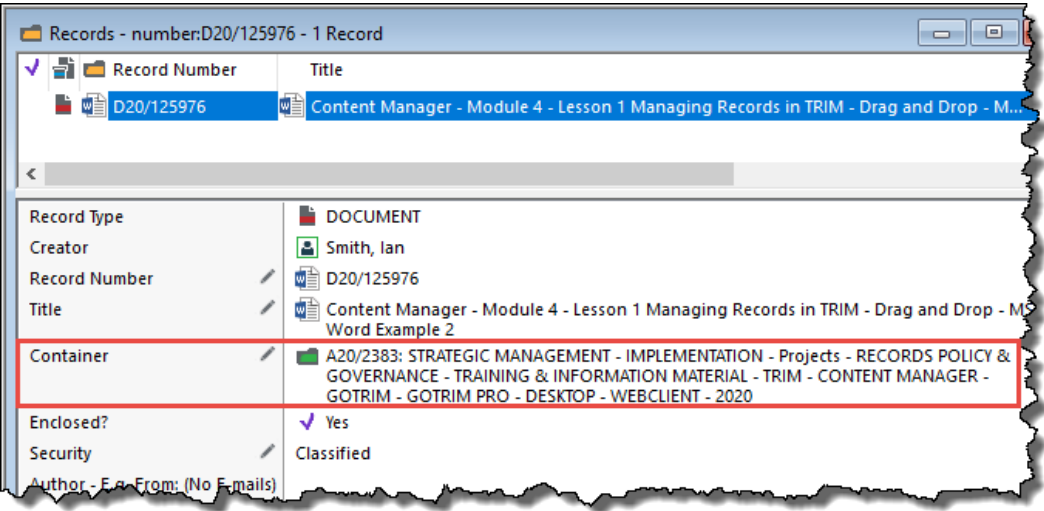

It's possible you could save a Record to the wrong location in TRIM. When this happens it's very often a quick fix for you rather than emailing the Records Team and waiting (however quick it might be) for a response.

Step	TRIM Desktop – Managing Records – Updating Basic Metadata – Change Container location of a Record
1.	<p>You can easily see what container a document is saved to in the meta data</p> 
2.	<p>Go to Container  03/12: TRIM Test and Training File then click on the  icon</p>



Step	TRIM Desktop – Managing Records – Updating Basic Metadata – Change Container location of a Record
	If you don't have the  email the Records Team (records@une.edu.au)
3.	<p>The Record Container window will appear.</p> 
4.	<p>Simply change the 'Set Container to' field to the new number and click </p> 



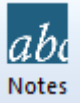
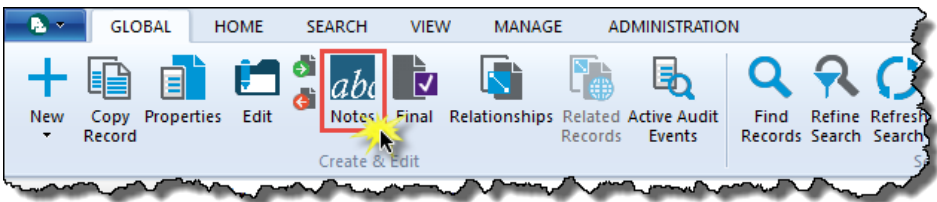
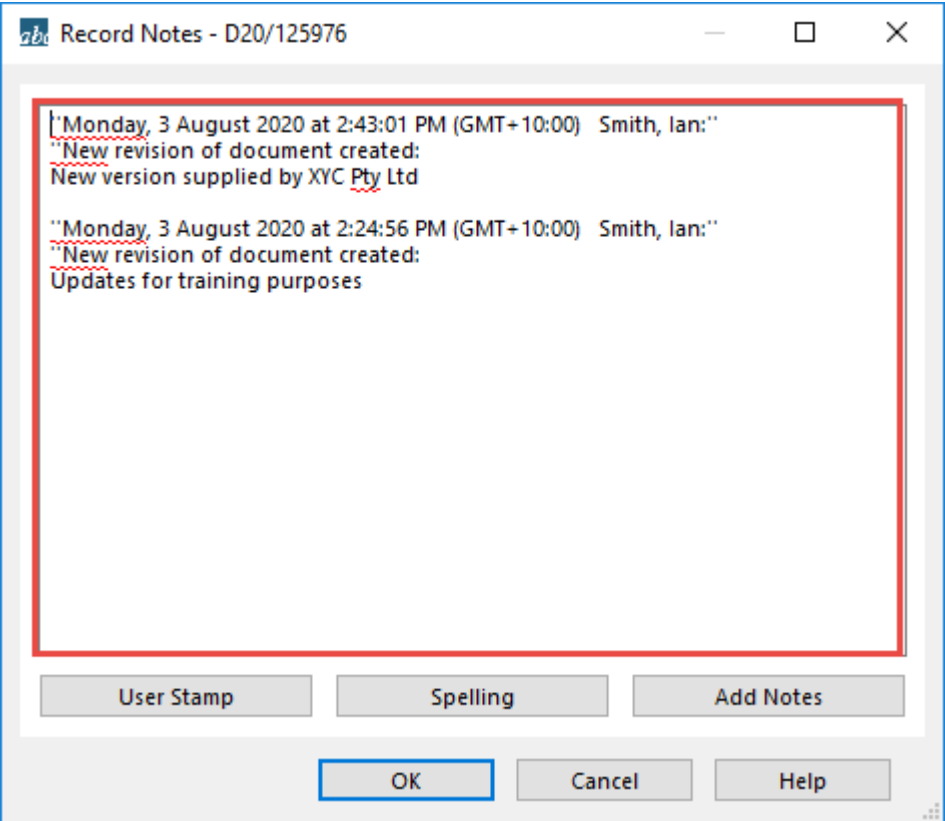
Step	TRIM Desktop – Managing Records – Updating Basic Metadata – Change Container location of a Record
5.	<p>The Container has now been changed...</p> 
	<p>When you save a document to a Container it takes on the security of that container.</p> <p>So, if you move the file to a container with a higher or more specific level of access, staff who may need to see the record can't.</p> <p>See Advanced course Module for how to update the security on a Record.</p>



Viewing and Adding Notes

Notes are very useful tool and can be used to record additional details about a record or to make the record easier to search for in TRIM.

There is a Search Function (Any Word) which includes Notes in its parameters. For more information on Advanced Searching options go to **Advanced Module**

Step	TRIM Desktop – Managing Records – Updating Basic Metadata – Viewing and Adding Notes
1.	<p>To View Notes, locate the record and click on </p> 
2.	<p>Existing Notes (if any) will then appear.</p> 

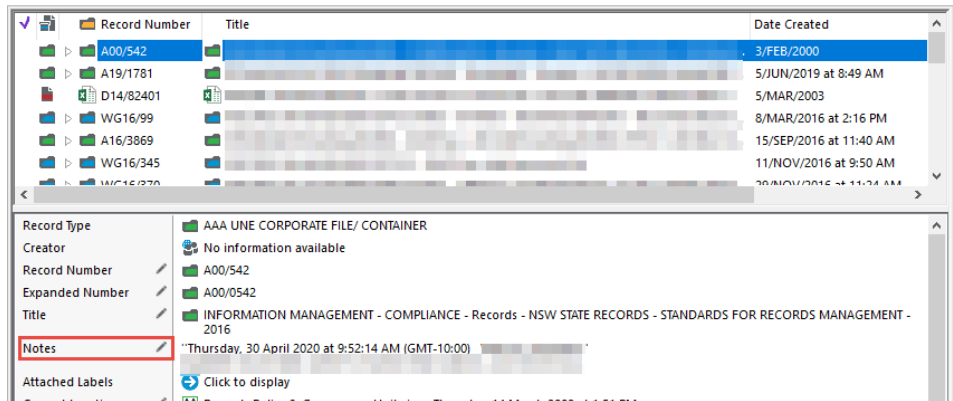


Step

TRIM Desktop – Managing Records – Updating Basic Metadata – Viewing and Adding Notes



You can also add the Notes field to the Meta Data in the Records View Pane (see later in this Lesson).

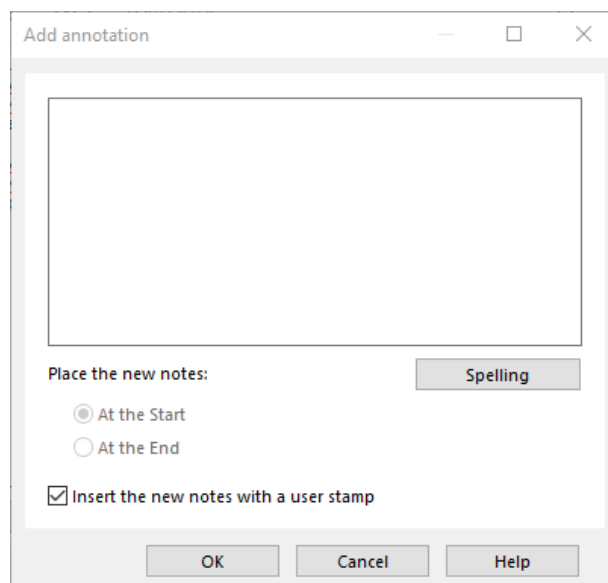


or view the Notes in the Notes Tab of the Records View Pane (See Module 2 Lesson 2)

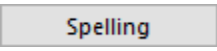

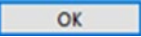
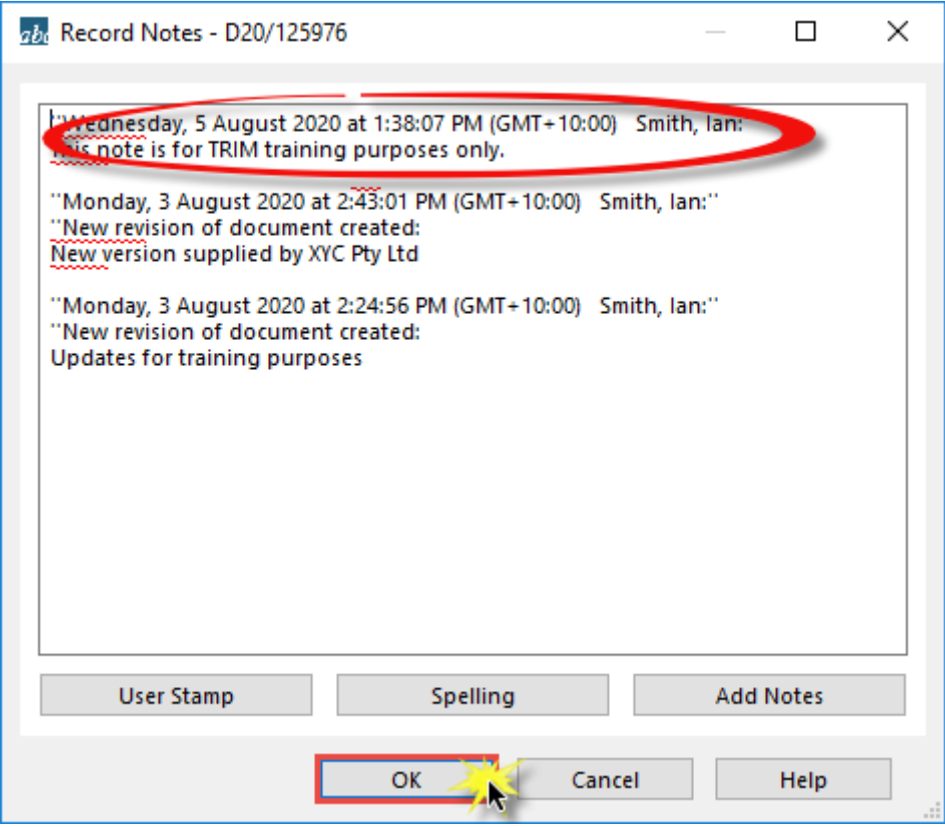


3.

To add notes, click on **Add Notes**, the Add annotation window will appear.





Step	TRIM Desktop – Managing Records – Updating Basic Metadata – Viewing and Adding Notes
4.	<p>Type in your notes.</p> <p>You can check your spelling by clicking on </p>
	<p>Notes are set to default at the beginning (Top) of the Notes window</p> <p>Place the new notes:</p> <p><input checked="" type="radio"/> At the Start</p> <p><input type="radio"/> At the End</p> <p>A User Stamp (Who made the note and when) can also be added</p> <p><input checked="" type="checkbox"/> Insert the new notes with a user stamp</p>
5.	<p>Click  and the note will appear...</p> 

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Recycle Bin (Removing a Record)

Records cannot be Deleted from TRIM, this is one of the key factors in why TRIM is a Records Management System. However, if you save a record incorrectly to TRIM and it should be removed, simply use the Recycle Bin.



A Record should not be sent to the Recycle Bin for the following reasons...

- Incorrect Title
- Saved to the wrong location (Container)
- There is a more up to date version available offline
- The work/project did not proceed


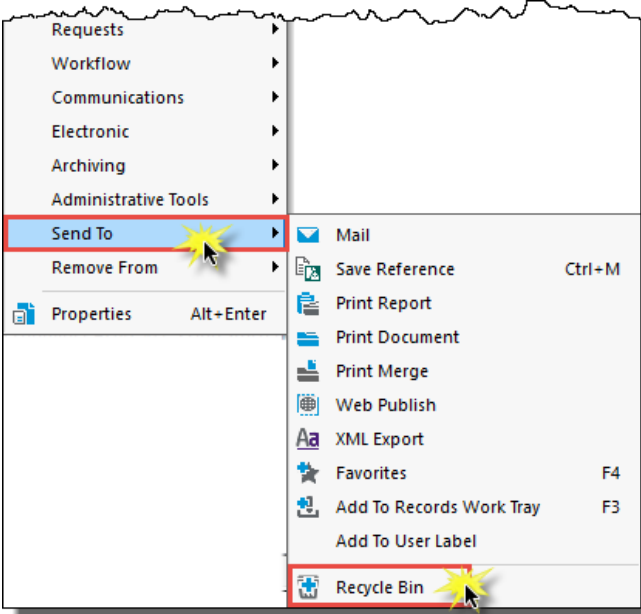
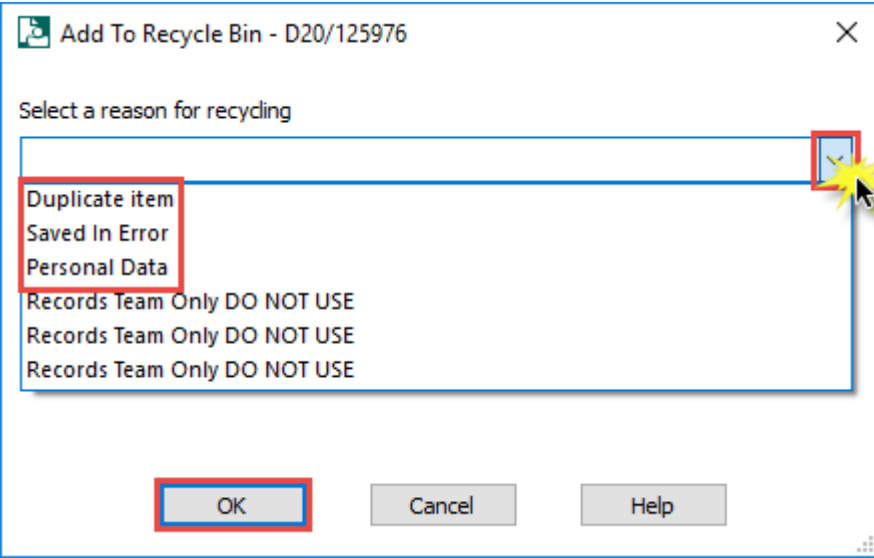
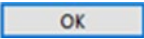

All of these issues are fixable without creating a second Record or the record still forms part of the history of what we have done, or even not done.

Also, TRIM will not allow you to send to the Recycle Bin if you did not create the Record (only the Creator can send to the recycle bin).

Contact the Records Team if you have any questions.

Step	TRIM Desktop – Managing Records – Updating Basic Metadata – Recycle Bin
1.	<p>Right click on the Record</p>



Step	TRIM Desktop – Managing Records – Updating Basic Metadata – Recycle Bin
2.	<p>Click Send to and then  Recycle Bin</p> 
3.	<p>The add to Recycle Bin Window will appear. Click on the drop down to select the reason you are sending to the Recycle Bin. In this example I will be using 'Duplicate Item'.</p>  <p>Click </p>
4.	<p>The Record will no longer appear.</p>
	<p>If you accidentally send a Record to the Recycle Bin, the Records Team can restore it if needs be.</p> <p>Simply email records@une.edu.au</p>



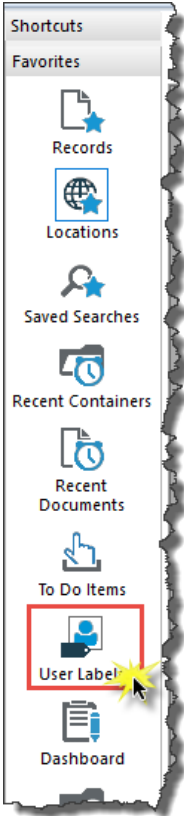
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User Labels and Explorer

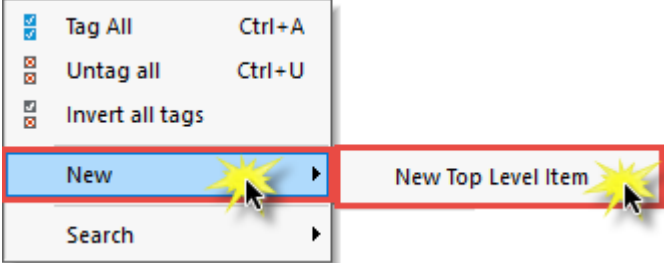
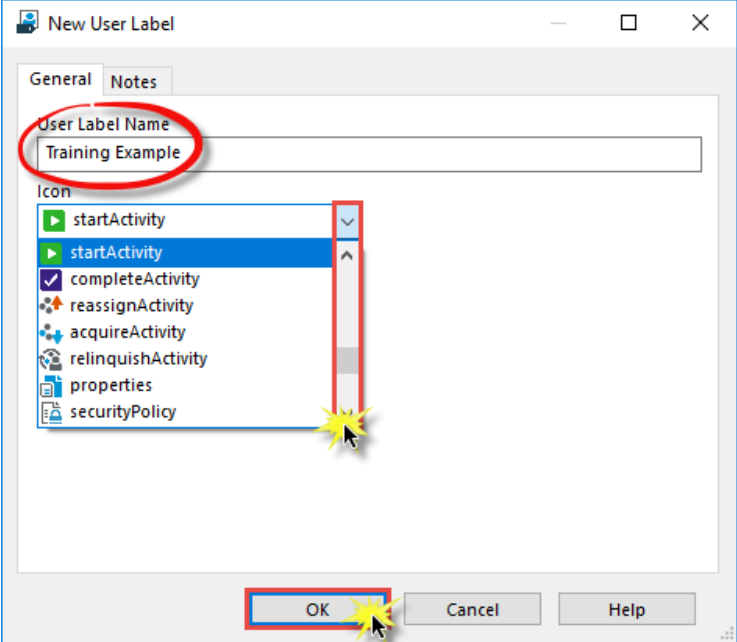
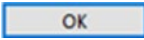
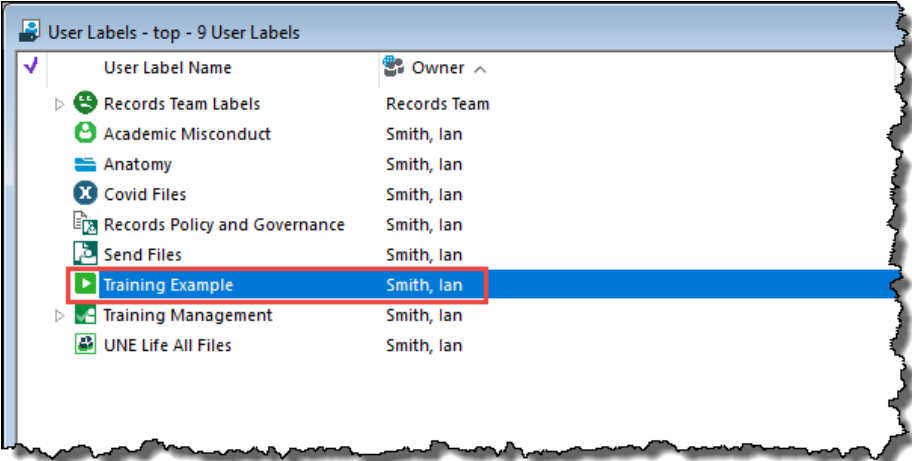
One of the most common pieces of feedback that the Records Team receives regarding TRIM is that it's very different to the Share Drive (Barney) or One Drive and some users struggle with these differences.

TRIM's file structure is flat and focusses entirely on the subject or content of the Record and users can see a maximum of 2 Levels of Containers. Whereas other systems use multiple layers of folders that usually follow location (i.e. what team 'owns' the data).

TRIM now offers User Labels which allows Users to tag Records and/or Containers so that they can easily track 'their' items. In addition, you can view them as if you were using Windows Explorer.

Step	TRIM Desktop – Managing Records – Create User Labels
1.	<p data-bbox="320 925 1050 958">Go to User Labels in the Short Cuts bar, Favourites</p> 



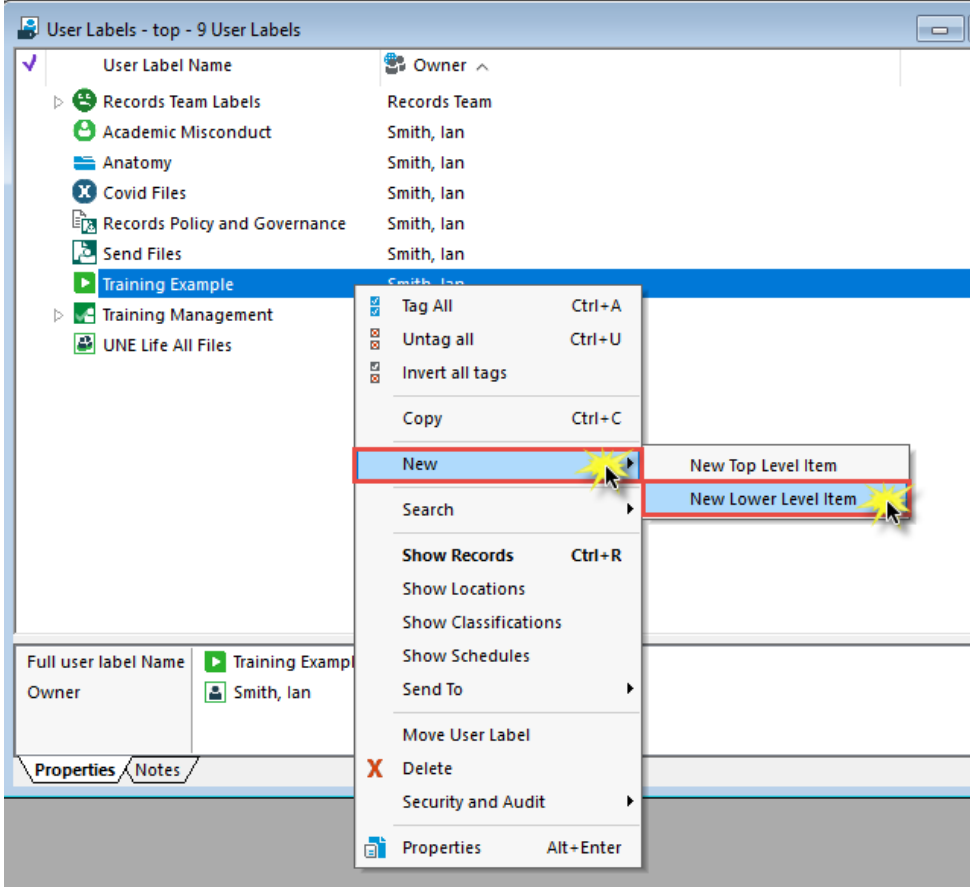
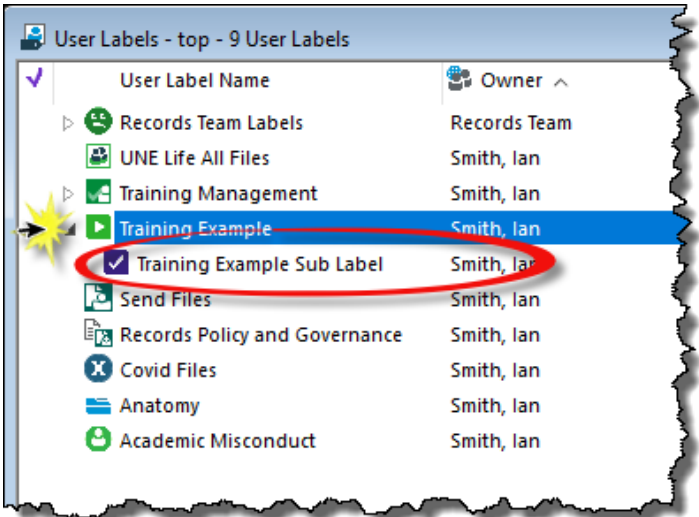
Step	TRIM Desktop – Managing Records – Create User Labels
2.	<p>The User Labels window will appear. Right click anywhere in the window. Click New and New Top-Level Item</p> 
3.	<p>Name your new User Label and select an Icon (the icons have specific names but you can use any in the list)</p>  <p>Click  to save the new Label</p>
4.	<p>The new User Label will appear in the window.</p> 

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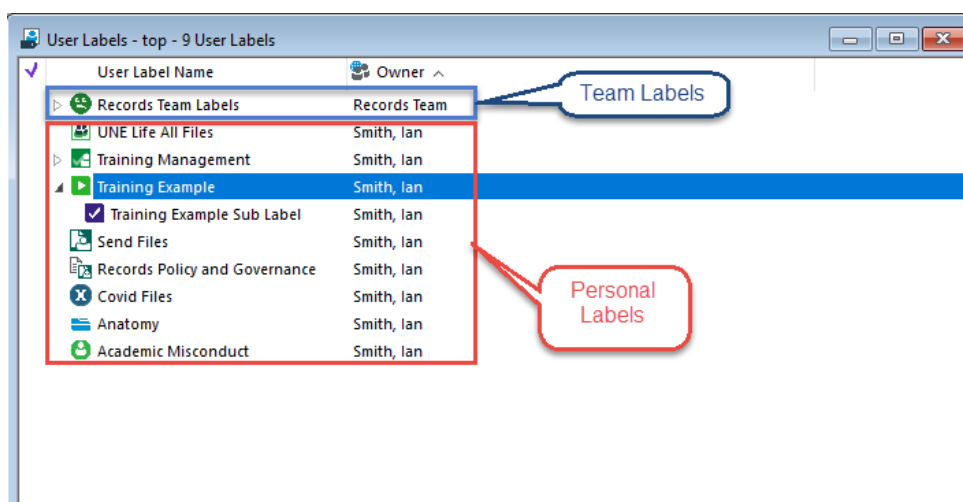


Step	TRIM Desktop – Managing Records – Create User Labels
5.	<p>You can then create a User Label like a sub folder. This time right click on the Label that you want to create another level for and click New and then click New Lower Level Item.</p> 
6.	<p>Again, complete the name and select an icon (you can use the same one) if you wish</p>
7.	<p>The Sub Level will now appear when you click on the .</p> 



Any TRIM user can create Labels for themselves.

You can easily tell which Labels are your personal Labels and which are the team Labels by the Owner.

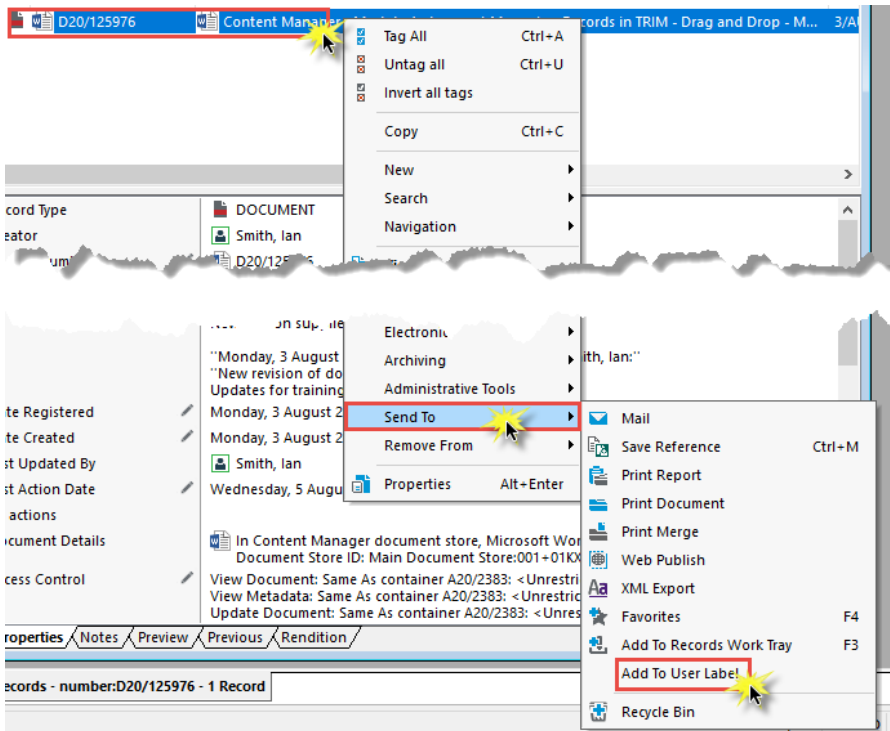

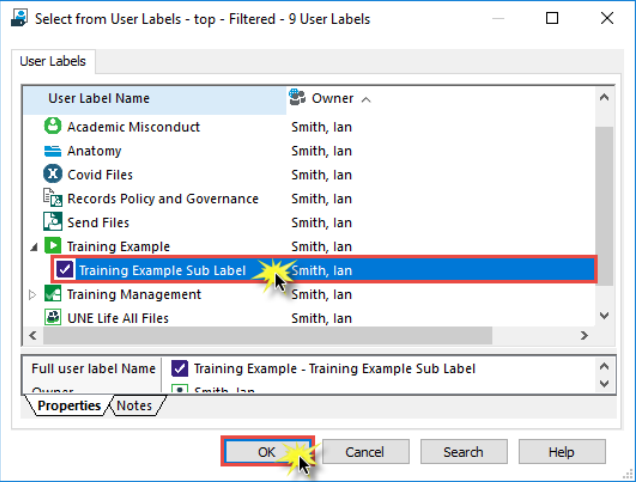
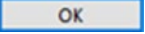



If you want Labels for a work area or team please contact the Records Team records@une.edu.au



Adding a User Label


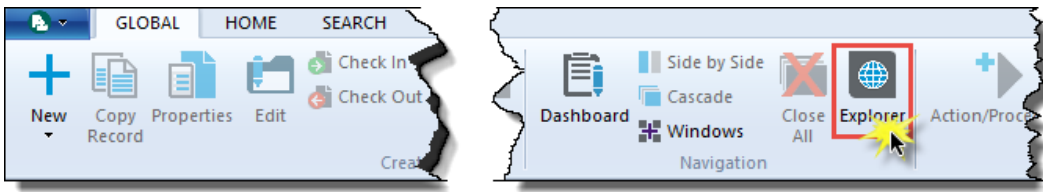
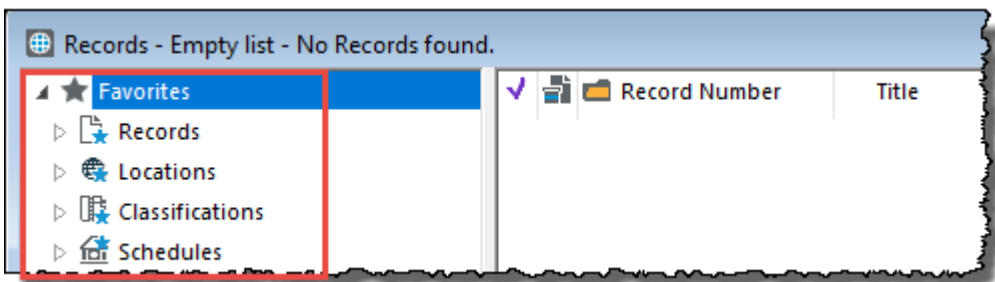
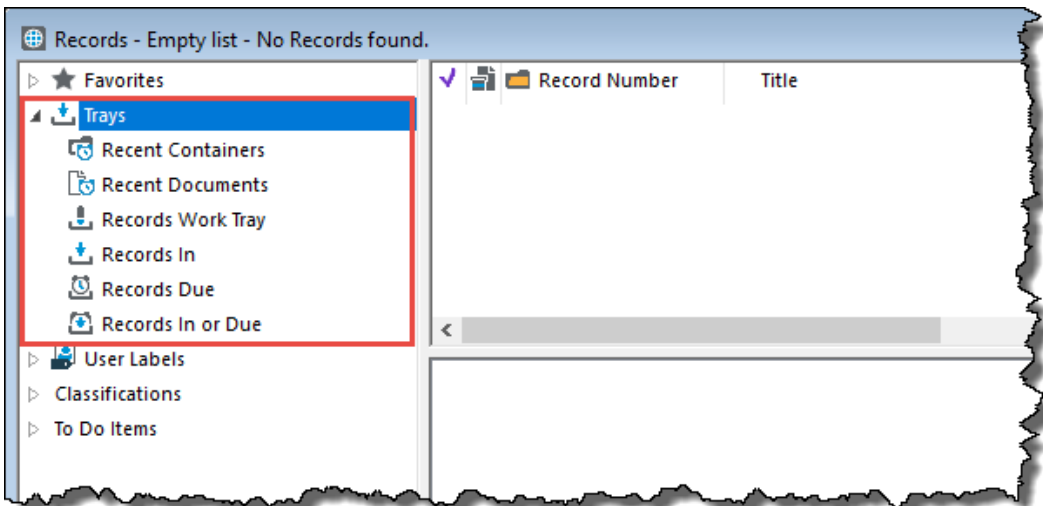
Multiple User labels can be added to a Record or Container.

Step	TRIM Desktop – Managing Records – Assigning a Label
1.	<p>Right click on the Document, click Send To and then Add To User Label</p> 
2.	<p>The Select from User Labels window will appear.</p> <p>Select the Label you want to assign (click on the  for Sub Labels)</p>  <p>Click </p>
	<p>You can right click in the window to create a New Label</p>
3.	<p>The Label has now been added to the Record</p>


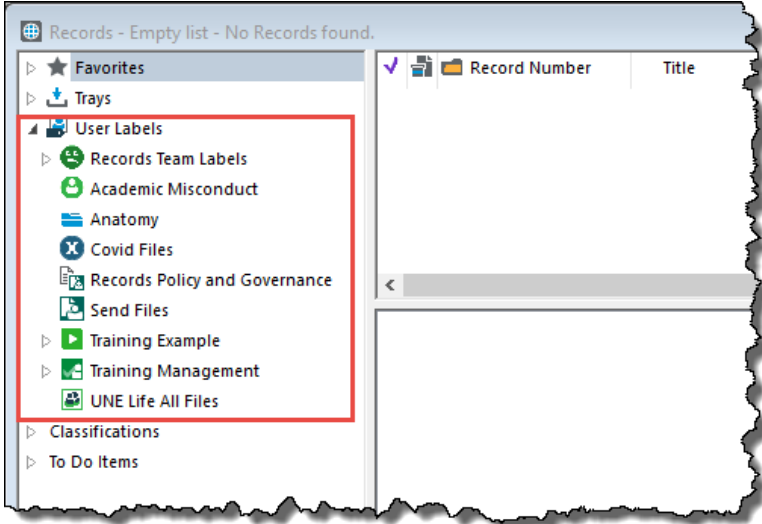
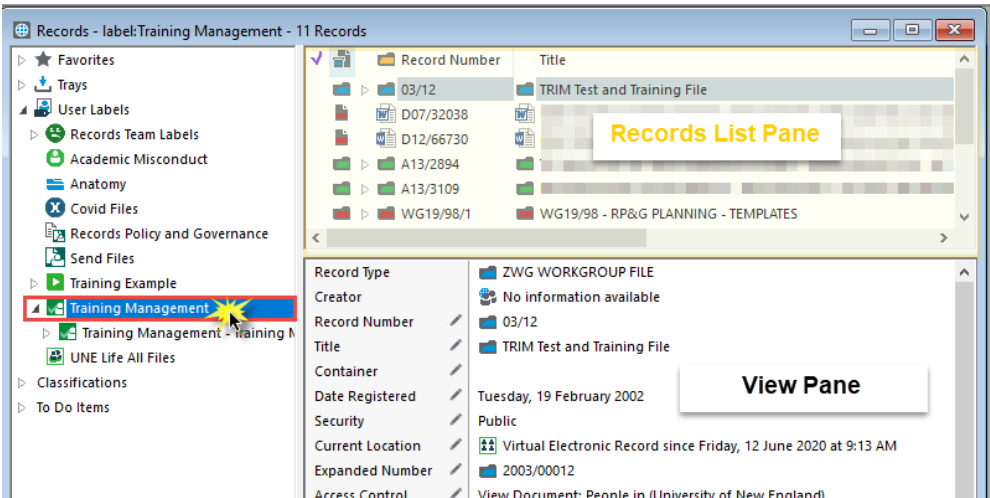


Explorer (User Labels)

Much like windows has Explorer so does TRIM. This is where you can see your labels and the Records assigned to them.

Step	TRIM Desktop – Managing Records – Explorer
1.	<p>In the Global Tab click on , the Explorer Window will appear.</p> 
2.	<p>Explorer provides alternate ways to get to your ...</p> <h4>Favorites</h4> 
3.	<h4>Trays</h4> 
4.	<p>and To do Items</p> <p>See Advanced Module</p>



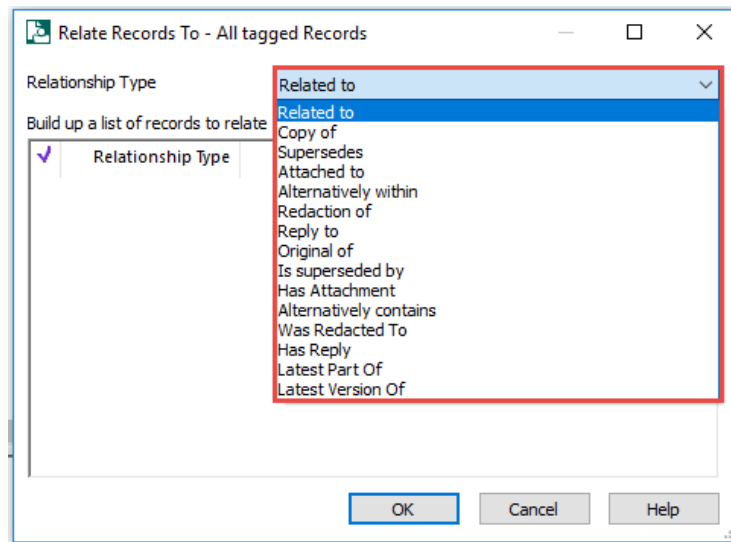
Step	TRIM Desktop – Managing Records – Explorer
5.	<p>However, it's the User Labels that are most useful. Simply click on  User Labels and your top level (including any Team or Group Labels) will appear.</p> 
6.	<p>You can then Navigate much the same way as you would in Windows Explorer to see what records exist in each Label.</p>  <p>This window is much the same as the overall TRIM window with a Records List Pane (displaying all those records with the Label attached) and the View Pane (Meta Data, Notes, Preview etc)</p>



Relating Records

TRIM allows you to 'Relate' records so that if you find one you can find the others or just make sure users are aware that there are other records or containers.

For instance, you can relate the Project file that was established and the Contract file that resulted together so they are both found at the same time.

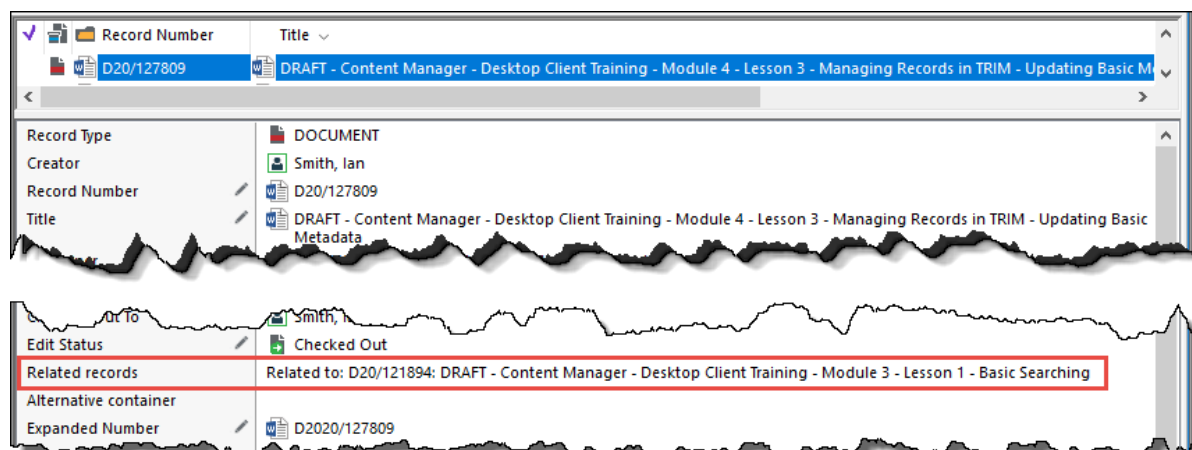


This lesson only covers 'Related to' see **Advanced Module** for...

- 💡 'Alternatively within' - have a record appear in two or more containers at the same time,
- 💡 'Supersedes' - where a new document replaces an old document
- 💡 'Is Superseded by' - where an old document is replaced by a new one.
- 💡 'Copy of' - Identifies multiple copies of a document

Relationships can be created either when you are creating a new record or you can link existing records easily.

To view an existing Relationship, go to the Records View Pane and you will find the 'Related records' field.

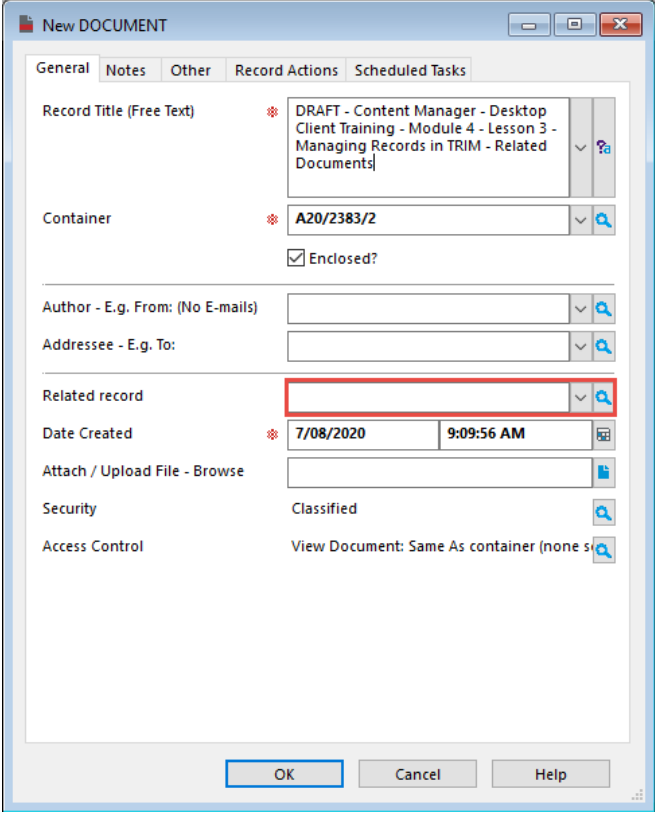





Records, Policy & Governance

TRIM – Content Manager

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Step	TRIM Desktop – Managing Records – Relate Records when creating a new document
1.	<p>Create the new Record. When you get to the New Document Window, complete the Title, Container and any other required fields and go the Related record field.</p> 
2.	<p>Go to the  Related record  and click on </p>



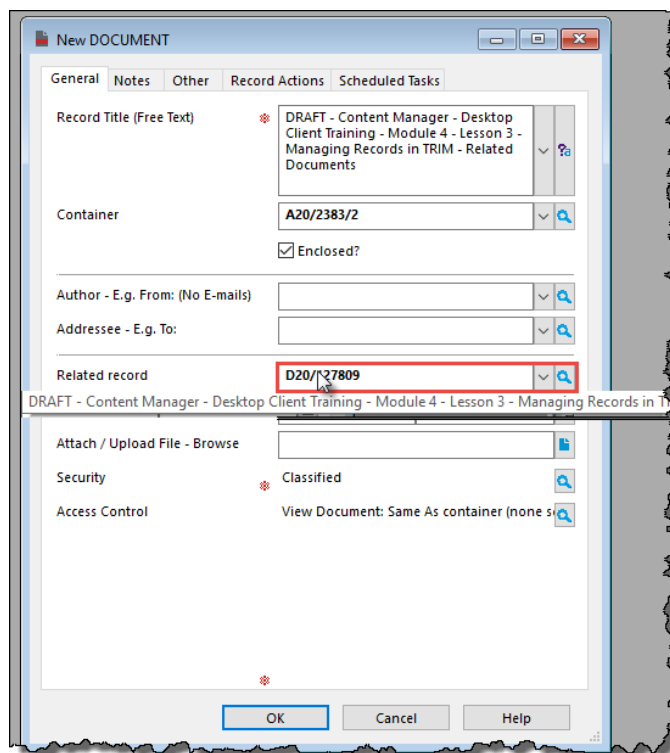
Step

TRIM Desktop – Managing Records – Relate Records when creating a new document



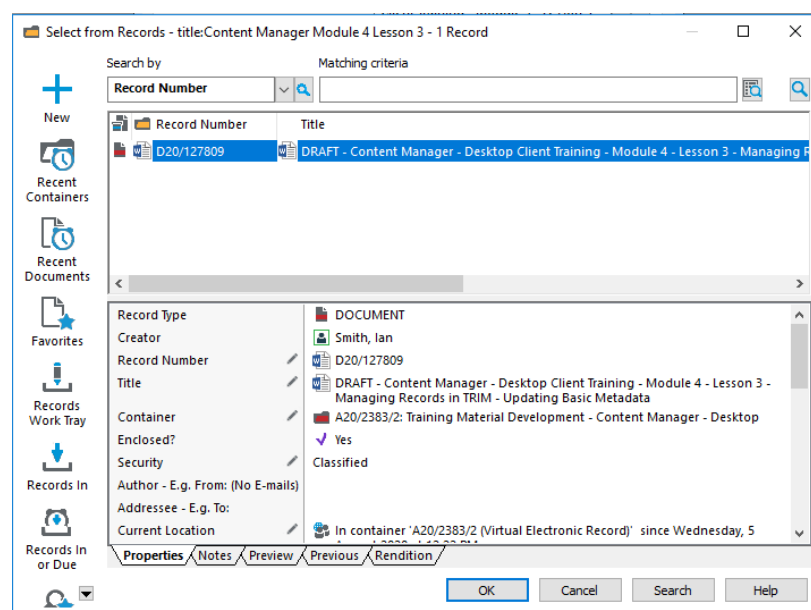
If you know the Record Number you want to relate the new record to just type it in, TRIM will locate it and the Font will go **Bold**.

You can then hover your mouse over the number and the name of the document will appear. You can then use that to confirm you are relating the right document



3.

The Search for Records window will appear. Complete the search as appropriate

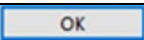
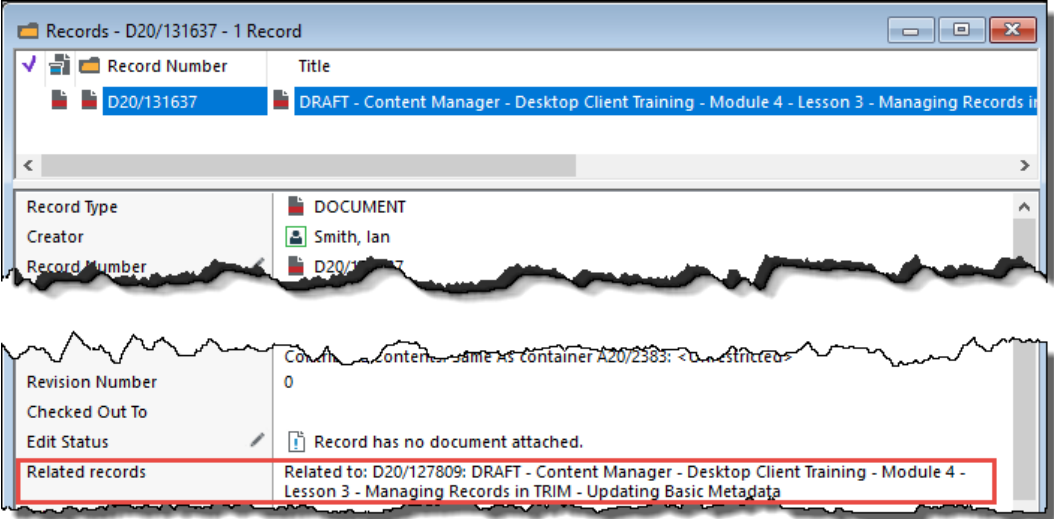



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Step	TRIM Desktop – Managing Records – Relate Records when creating a new document
4.	Select the Record and Click 
5.	<p>Finalise the form and the new Record is now related to the existing Record</p> 
	<p>You can relate as many Records together as you need and the relationships are viewable by any user with access to those records.</p>


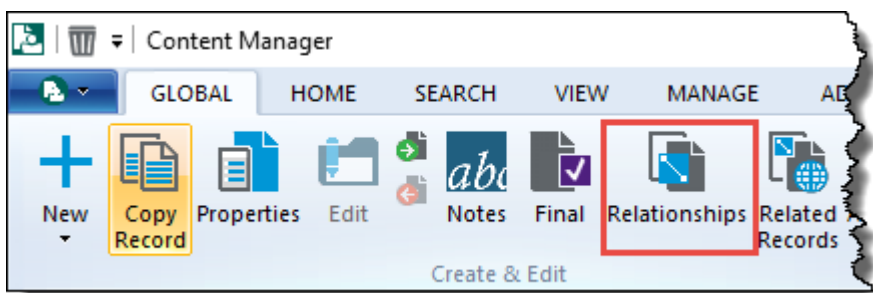
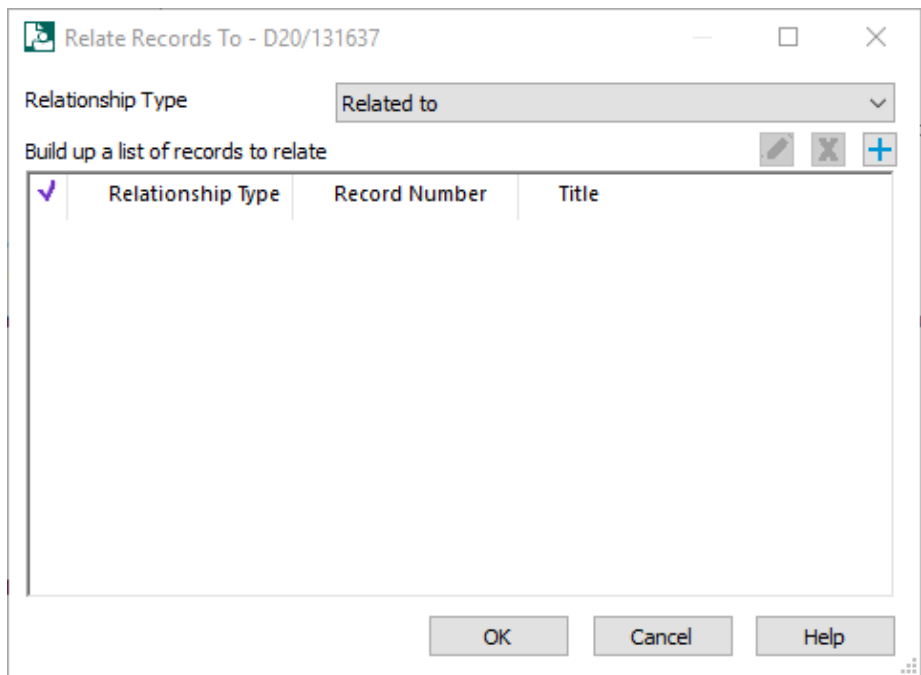


Relate existing Records

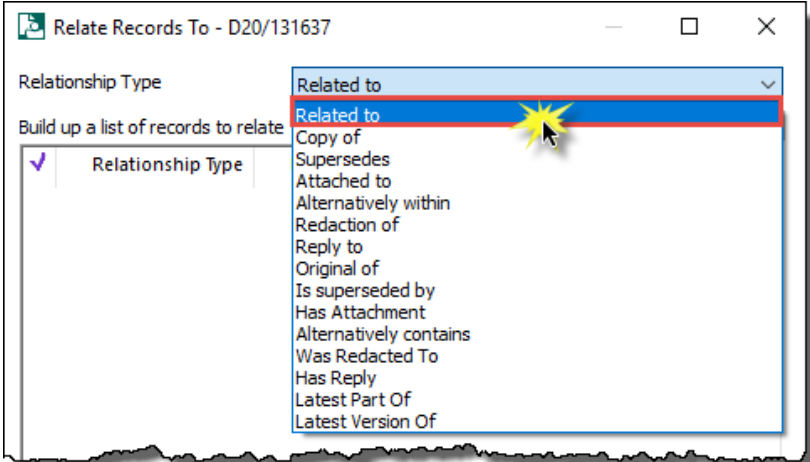

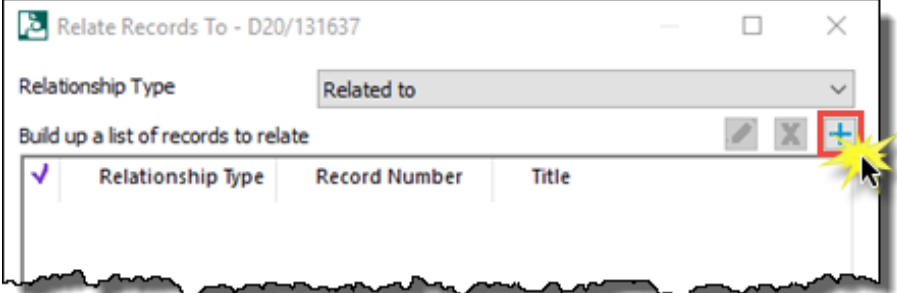
Of course, sometimes you will have existing Records or containers that you want to relate, and to do this is a slightly different process.



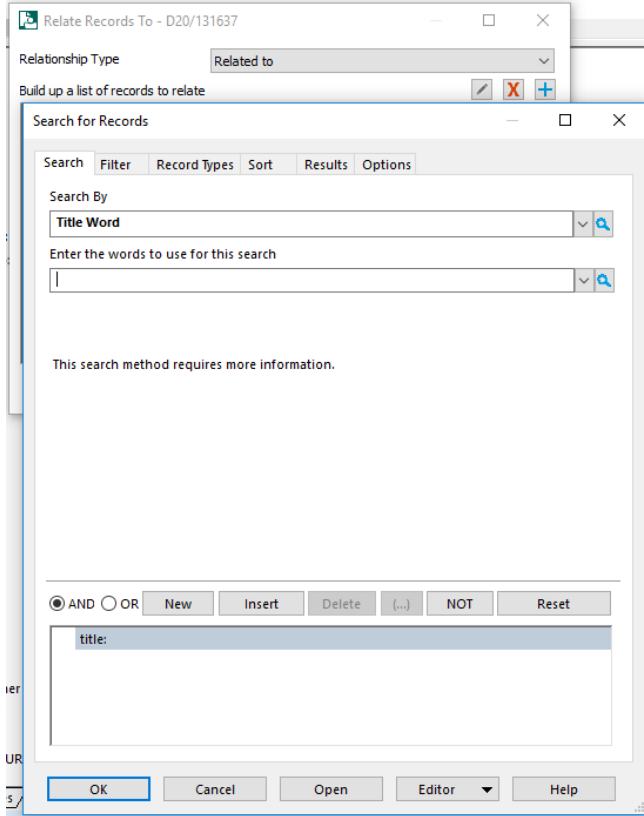
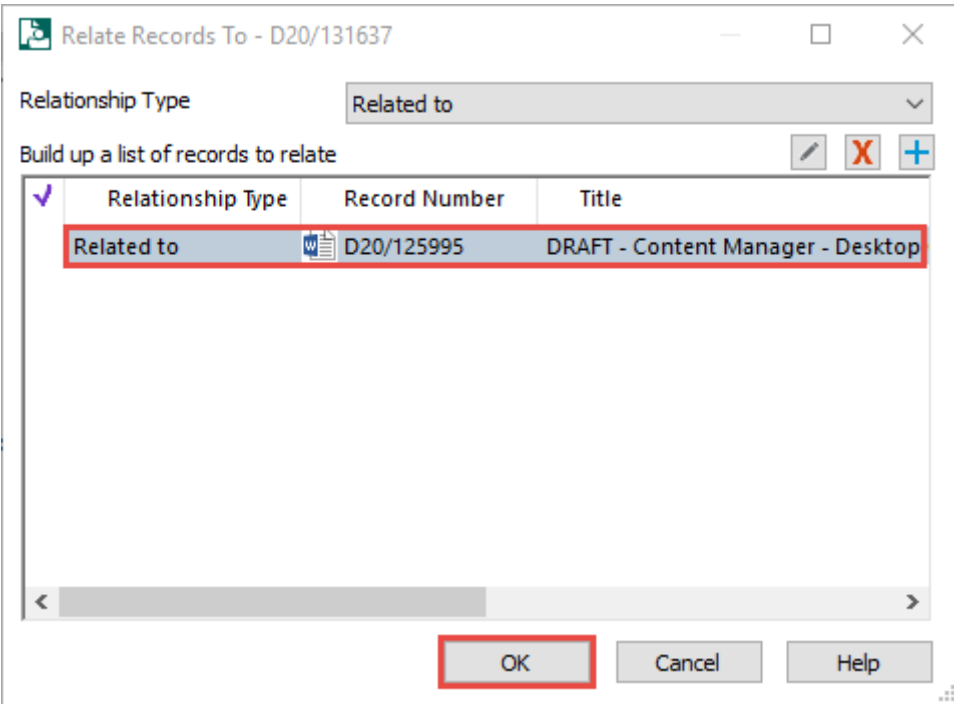
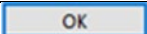
At the time of writing (August 2020) there is an issue with using the Relationships Button to edit or remove Relationships. Please use the Properties option instead, details are below

Step	TRIM Desktop – Managing Records – Relate existing Records
1.	Locate the records you want to relate. It's much easier if you already know their Record Numbers
2.	<p>Select one Record (although you can select multiples if needs be).and click on </p> 
3.	<p>The Relate Records To window will appear.</p> 



Step	TRIM Desktop – Managing Records – Relate existing Records
4.	<p>If you want to 'Relate to' ensure you click on the Relationship type drop down and select the correct option</p> 
5.	<p>Click on the </p> 



Step	TRIM Desktop – Managing Records – Relate existing Records
6.	<p>Search for the Record you want to Relate to (See Module 3 Lesson 1 – Basic Searching)</p> 
7.	<p>Once the record is selected it will appear in the Relate Records To window</p> 
8.	<p>Once complete click </p>

Records, Policy & Governance

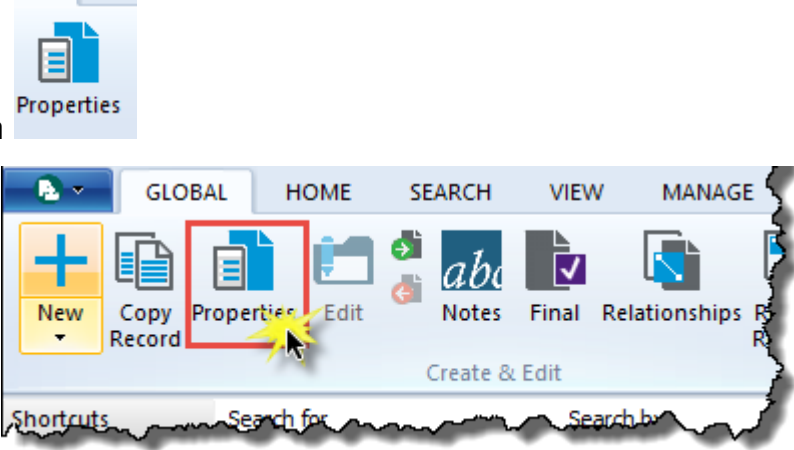
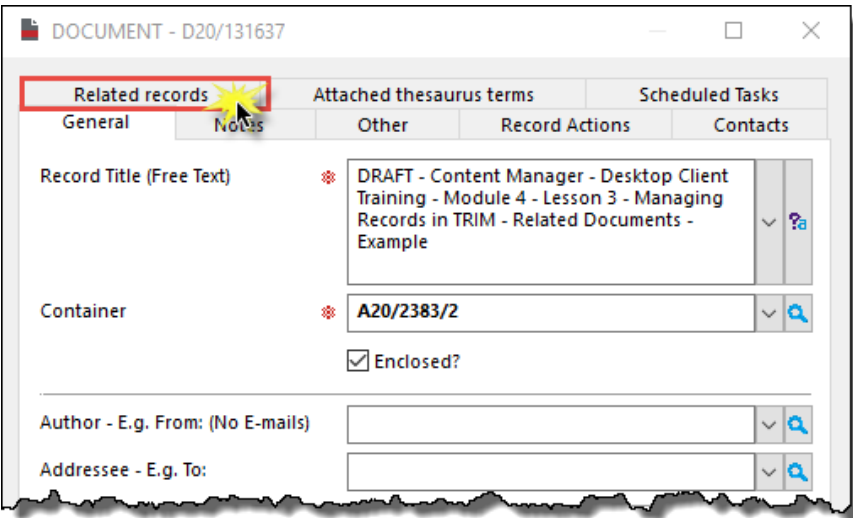
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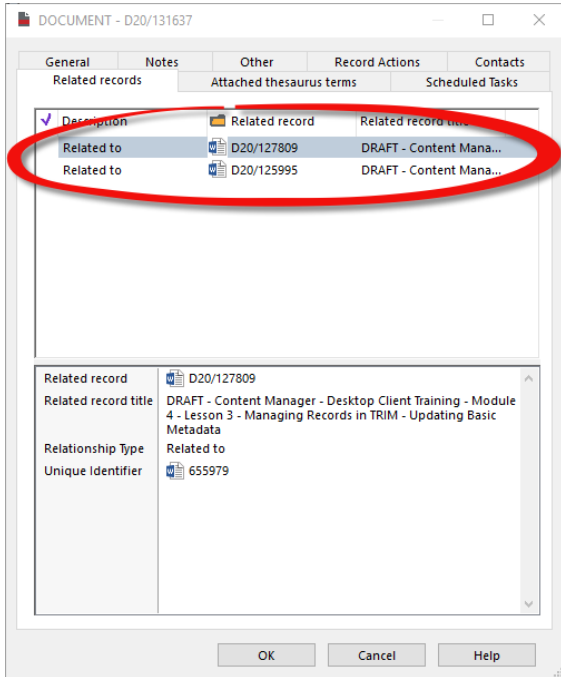
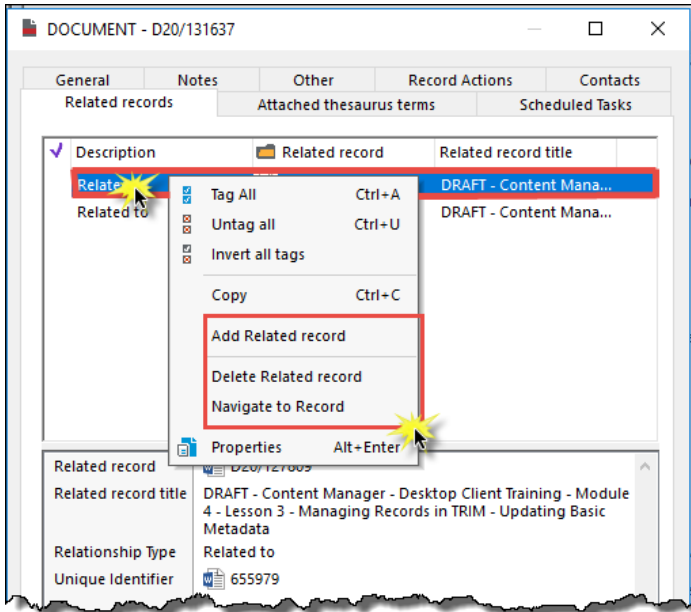


Removing a Related Record

At the time of writing (August 2020) there is an issue with using the Relationships Button to Edit or remove Relationships. Please use the Properties option instead, details are below

Step	TRIM Desktop – Managing Records – Editing Relationships
1.	<p>Click on</p> 
2.	<p>The Properties window will appear, click on the Related records tab</p> 



Step	TRIM Desktop – Managing Records – Editing Relationships
3.	<p>The list of Related records will appear.</p> 
4.	<p>To Add, Edit or Remove a Relationship, right click and select the appropriate option.</p> 


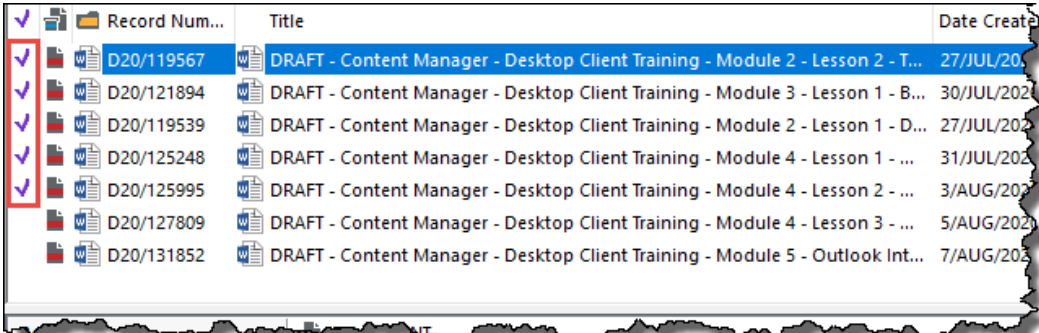

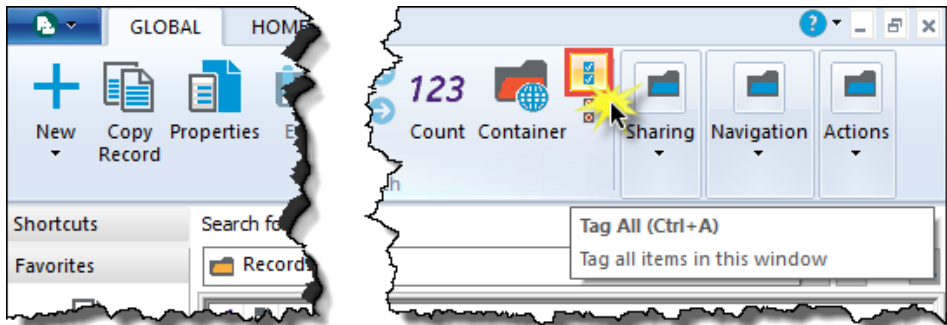


Sharing from TRIM

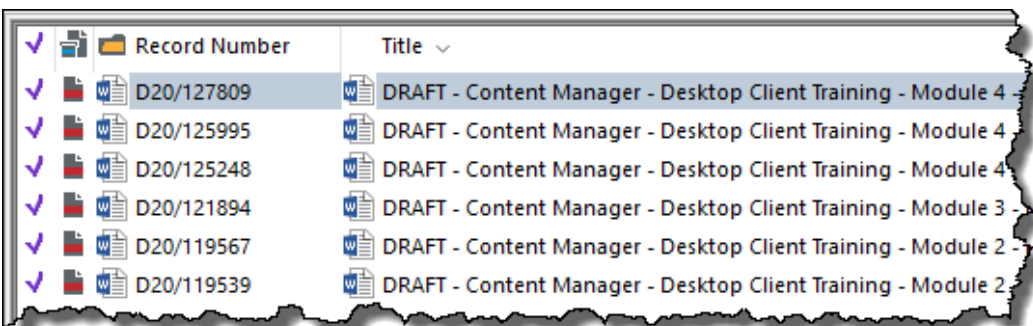
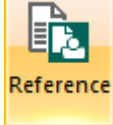
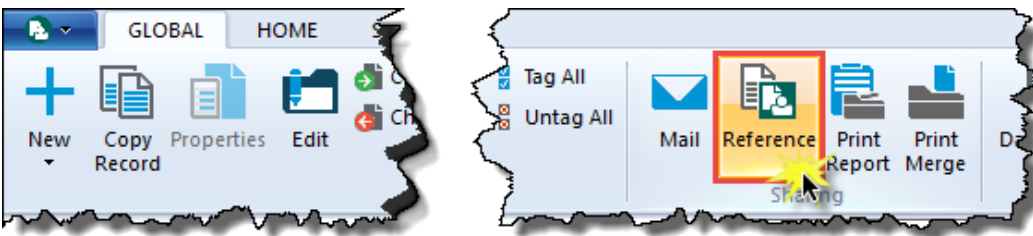
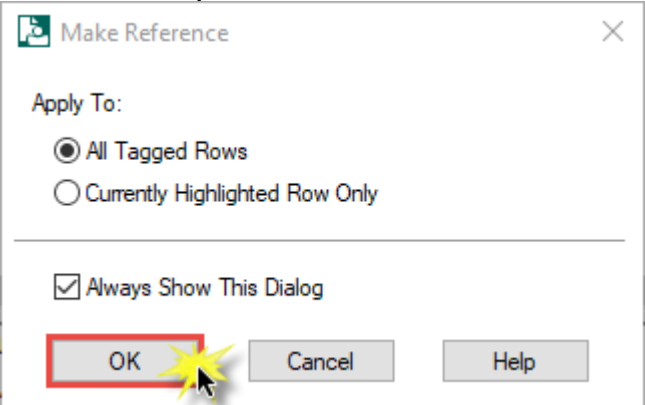
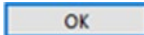



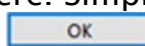
References

TRIM has functionality that allows users to share records and information from TRIM with other users and non-users.

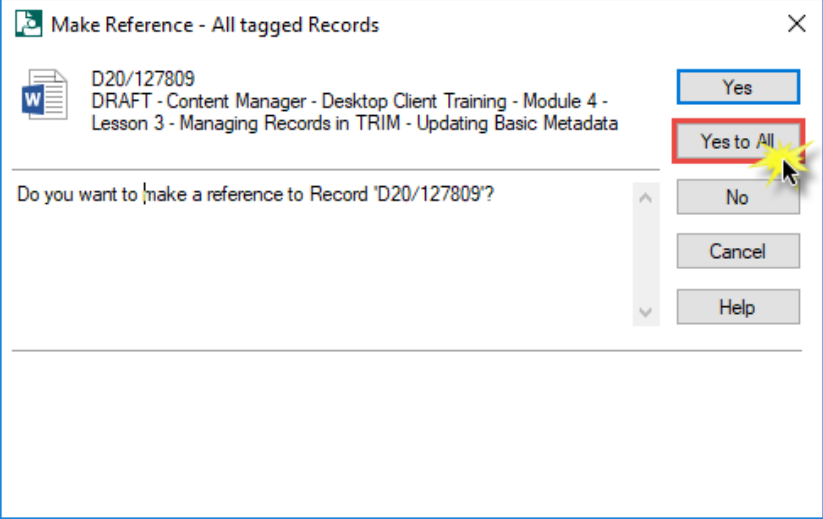
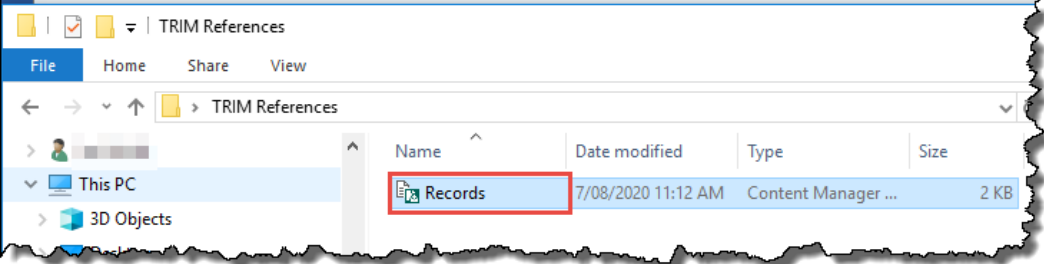


This includes References (a type of link), hyperlinks for records (links to the TRIM Web Client) and emailing Records and References directly from TRIM.

Step	TRIM Desktop – Managing Records – References																								
1.	References are a type of link that allows other users to simply click to bring up the record in TRIM. To create a Reference simply locate the Container/s and/or Record/s you want to share.																								
	<p>If you want to select multiple records simply tag the ones you want by clicking on the left-hand side of the record.</p>  <table><thead><tr><th>Record Num...</th><th>Title</th><th>Date Create</th></tr></thead><tbody><tr><td>D20/119567</td><td>DRAFT - Content Manager - Desktop Client Training - Module 2 - Lesson 2 - T...</td><td>27/JUL/20...</td></tr><tr><td>D20/121894</td><td>DRAFT - Content Manager - Desktop Client Training - Module 3 - Lesson 1 - B...</td><td>30/JUL/20...</td></tr><tr><td>D20/119539</td><td>DRAFT - Content Manager - Desktop Client Training - Module 2 - Lesson 1 - D...</td><td>27/JUL/20...</td></tr><tr><td>D20/125248</td><td>DRAFT - Content Manager - Desktop Client Training - Module 4 - Lesson 1 - ...</td><td>31/JUL/20...</td></tr><tr><td>D20/125995</td><td>DRAFT - Content Manager - Desktop Client Training - Module 4 - Lesson 2 - ...</td><td>3/AUG/20...</td></tr><tr><td>D20/127809</td><td>DRAFT - Content Manager - Desktop Client Training - Module 4 - Lesson 3 - ...</td><td>5/AUG/20...</td></tr><tr><td>D20/131852</td><td>DRAFT - Content Manager - Desktop Client Training - Module 5 - Outlook Int...</td><td>7/AUG/20...</td></tr></tbody></table> <p>If you want to select all of the records in the Records List Pane simply click on  (or CTRL + A)</p> 	Record Num...	Title	Date Create	D20/119567	DRAFT - Content Manager - Desktop Client Training - Module 2 - Lesson 2 - T...	27/JUL/20...	D20/121894	DRAFT - Content Manager - Desktop Client Training - Module 3 - Lesson 1 - B...	30/JUL/20...	D20/119539	DRAFT - Content Manager - Desktop Client Training - Module 2 - Lesson 1 - D...	27/JUL/20...	D20/125248	DRAFT - Content Manager - Desktop Client Training - Module 4 - Lesson 1 - ...	31/JUL/20...	D20/125995	DRAFT - Content Manager - Desktop Client Training - Module 4 - Lesson 2 - ...	3/AUG/20...	D20/127809	DRAFT - Content Manager - Desktop Client Training - Module 4 - Lesson 3 - ...	5/AUG/20...	D20/131852	DRAFT - Content Manager - Desktop Client Training - Module 5 - Outlook Int...	7/AUG/20...
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D20/125248	DRAFT - Content Manager - Desktop Client Training - Module 4 - Lesson 1 - ...	31/JUL/20...																							
D20/125995	DRAFT - Content Manager - Desktop Client Training - Module 4 - Lesson 2 - ...	3/AUG/20...																							
D20/127809	DRAFT - Content Manager - Desktop Client Training - Module 4 - Lesson 3 - ...	5/AUG/20...																							
D20/131852	DRAFT - Content Manager - Desktop Client Training - Module 5 - Outlook Int...	7/AUG/20...																							



Step	TRIM Desktop – Managing Records – References
2.	<p>In this example I am selecting all of these Records as a Reference</p> 
3.	<p>Click on </p> 
4.	<p>Because I have selected multiple records, TRIM just wants to make sure I really do want to send them all.</p>  <p>Select the correct Radio button and Click </p>
5.	<p>You are then given the option of creating the references individually or as a single group. The Records Team recommends using the Single Content Manager Reference File Option.</p> <p> Create a single Content Manager Reference File</p> <p>Click on <input data-bbox="462 1892 1292 1926" type="text" value="C:\Users\ismith6\Desktop\TRIM References\Records.tr5"/> </p>
6.	<p>You will need to save the reference somewhere. Simply click on  to select your preferred location. Then Click </p>


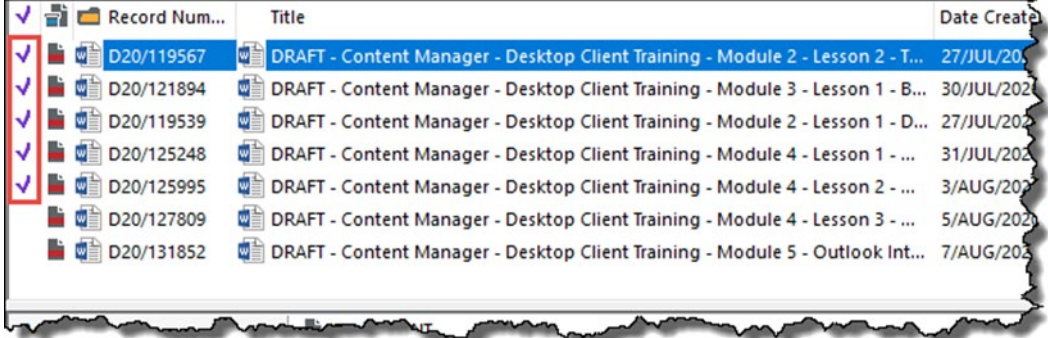

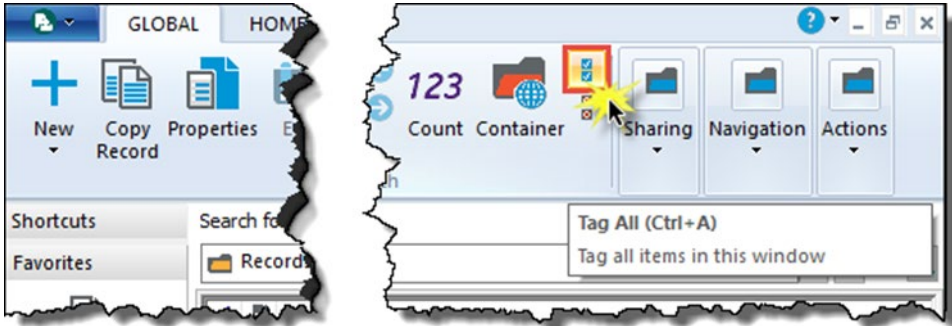

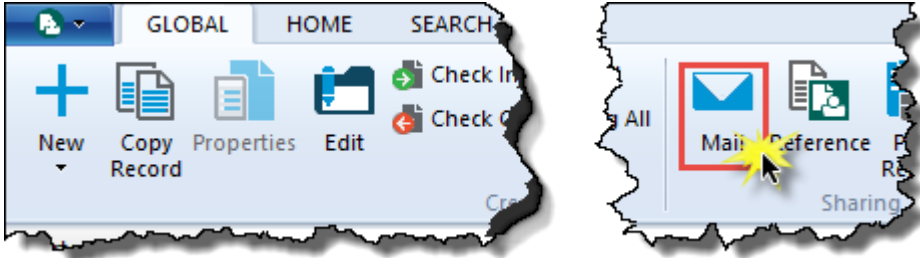


Step	TRIM Desktop – Managing Records – References
7.	<p>The Make Reference window will appear if you agree, click either Yes to check each one or Yes to All (Records Team Recommends the second option)</p> 
8.	<p>The Reference has been saved to the location selected by you.</p> 
 	<p>References can be attached to emails to other users and it will open TRIM at those records if used.</p> <p>NOTE: Sending a Reference to another user does not give the other user access if they don't already have it.</p> <p>For information on Security in TRIM, please contact the Records Team (records@une.edu.au) or go to Advanced Module # - MISSING</p>

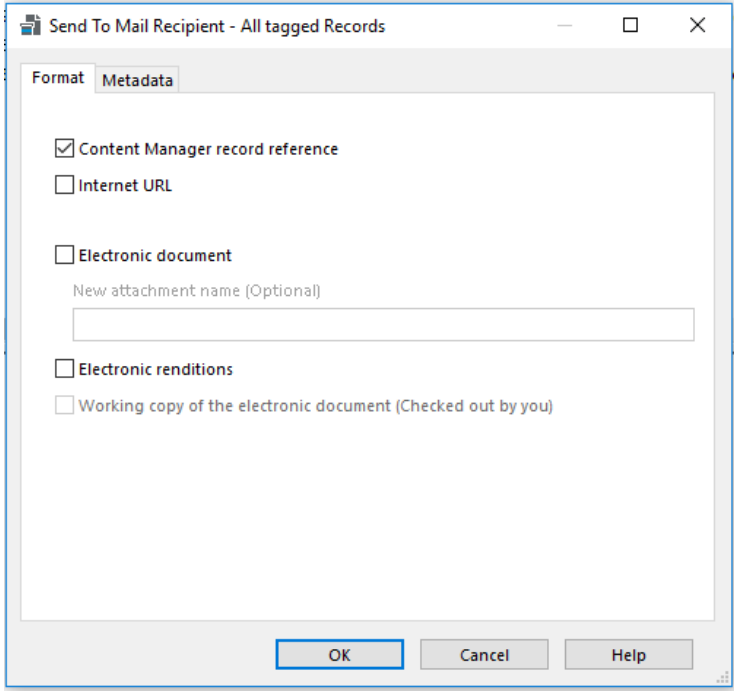
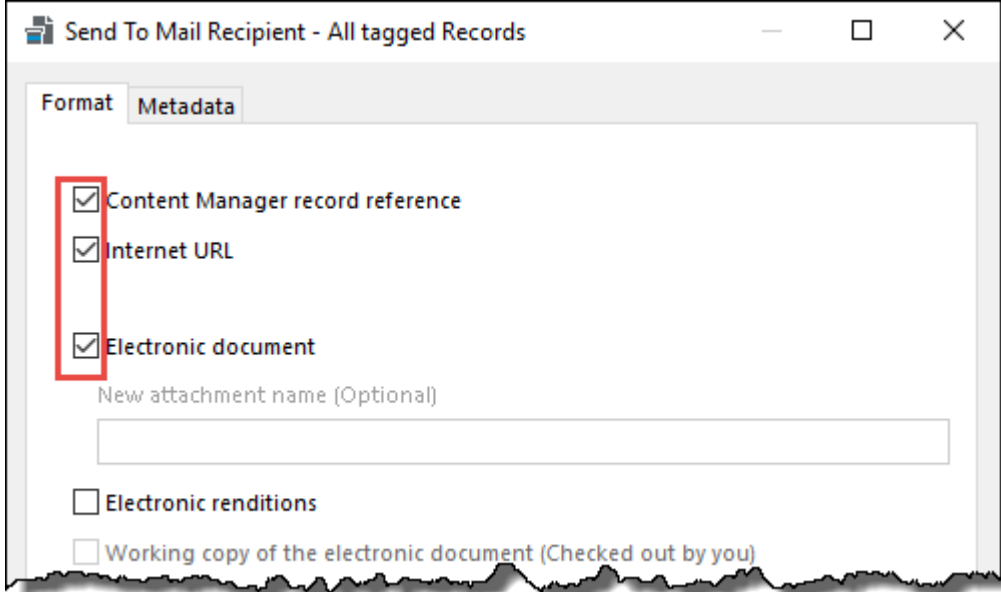
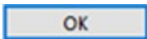


Emailing from TRIM

TRIM gives multiple simple options to email information to other users and non-users.

Step	TRIM Desktop – Managing Records – Emailing from TRIM
1.	Locate the Record/s you want to send to another person.
	<p>If you want to select multiple records simply tag the ones you want by clicking on the left-hand side of the record.</p>  <p>If you want select all of the records in the Records List Pane simply click on  (or CTRL + A)</p> 
2.	 <p>Click on</p> 








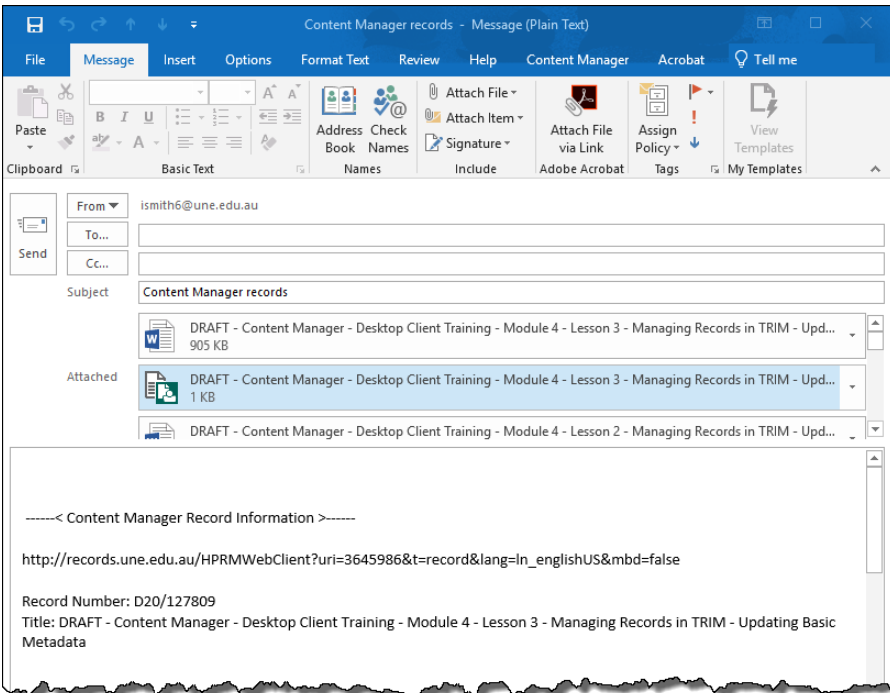
Step	TRIM Desktop – Managing Records – Emailing from TRIM
3.	<p>The Send to Mail Recipient window will appear</p> 
4.	<p>Select the Options you want to use. In this case we will select</p>  <p>You can select whichever is the most appropriate.</p> <p>Click </p>

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Step	TRIM Desktop – Managing Records – Emailing from TRIM
	<p>There are 3 main options...</p> <ul style="list-style-type: none">  Content Manager record reference will send a reference (or link) that the other user can click on and be taken to TRIM at that document  Internet URL – This will open the TRIM Web Client at the Record  Electronic Document – The actual document itself will be sent to the other party. There is a risk as this will be an uncontrolled copy not subject to TRIM security. This should only be used when sending to external parties.
	<p>If sending an Electronic Document which you expect will be updated and returned it is highly recommended that you Check Out the document in TRIM so it cannot be edited while it is with the Third party.</p>
<p>5.</p>	<p>If you have selected multiple records you will be asked to confirm your selection.</p> <p>Click <input type="button" value="Yes"/> or <input type="button" value="Yes to All"/> as appropriate.</p>
<p>6.</p>	<p>The email will appear and each document (in this case) with both the document and reference attached and the hyperlink/s embedded in the content of the email.</p>  <p>Send the email when ready</p>



Creating Sub Folders

TRIM's structure is flat compared to Share Drives and One Drive; however, you can have one level of Sub Folders.

Sub folders can be used to help you sort your records in the way that makes sense to you. There are 2 ways to create a sub folder


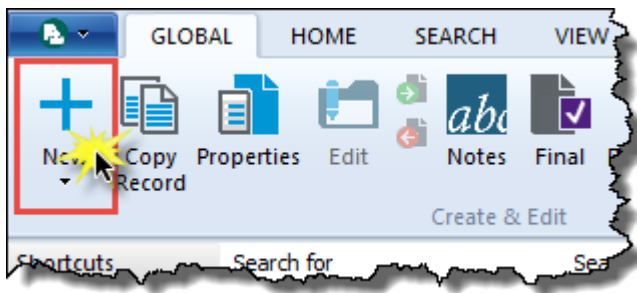
- 💡 Create a New Subfolder
- 💡 Copy an existing Subfolder in the same Container



You can create Sub folders in any Container that you have access to – however they can only be used for records that would be saved into that folder if there were no subfolders.

This is because the Retention Schedule (how long we have to keep the records in the file) is set based on the topic/subject. Adding in other documents means we may destroy documents before we are legally supposed to.

Create a New Sub folder


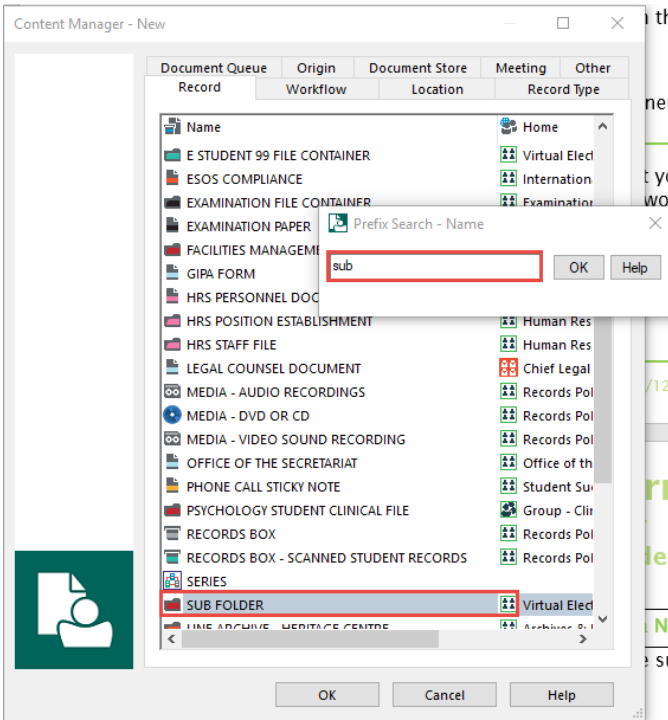

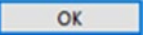
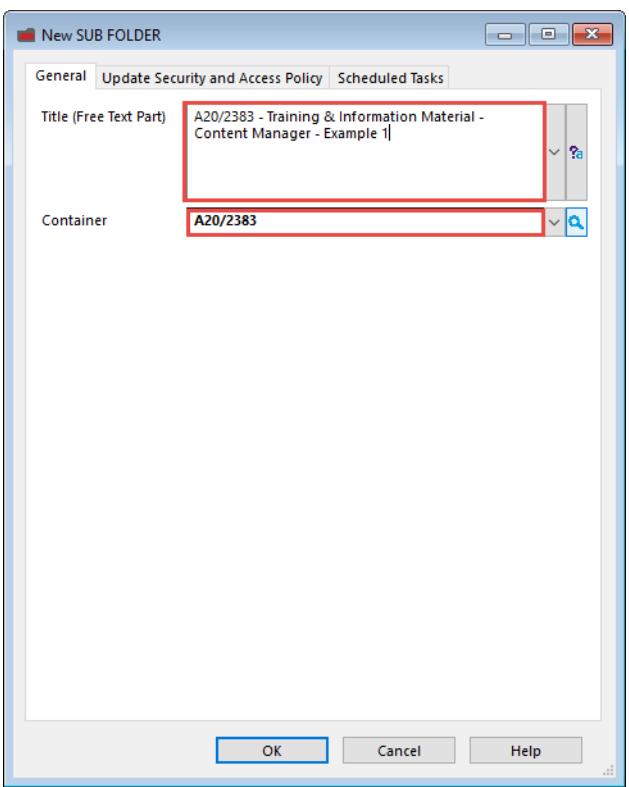
Step	TRIM Desktop – Managing Records – Create a New Sub folder
1.	<p>Locate the Container where you want to add the sub folder (you don't need it open but you need the number).</p> <p>I will be using A20/2383 in this example.</p>
2.	<p>Click </p> 

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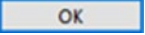
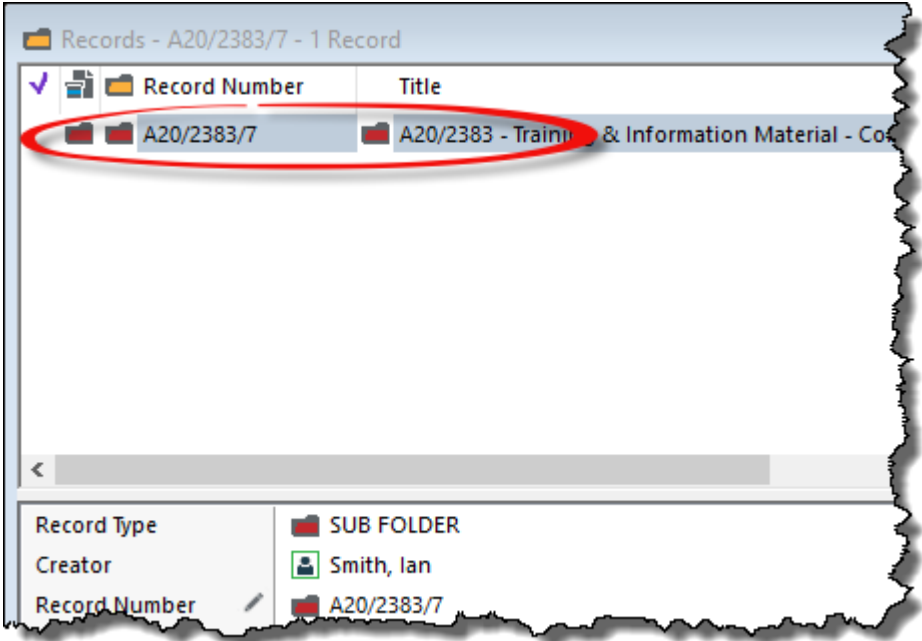
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Step	TRIM Desktop – Managing Records – Create a New Sub folder
3.	<p>The Content Manager – New window will appear.</p> <p>To find the  SUB FOLDER option quickly, simply start typing the word ‘sub folder’, TRIM will take you to it</p>  <p>Select  SUB FOLDER and click </p>
4.	<p>Title the Sub Folder appropriately and add the Container Number</p> 

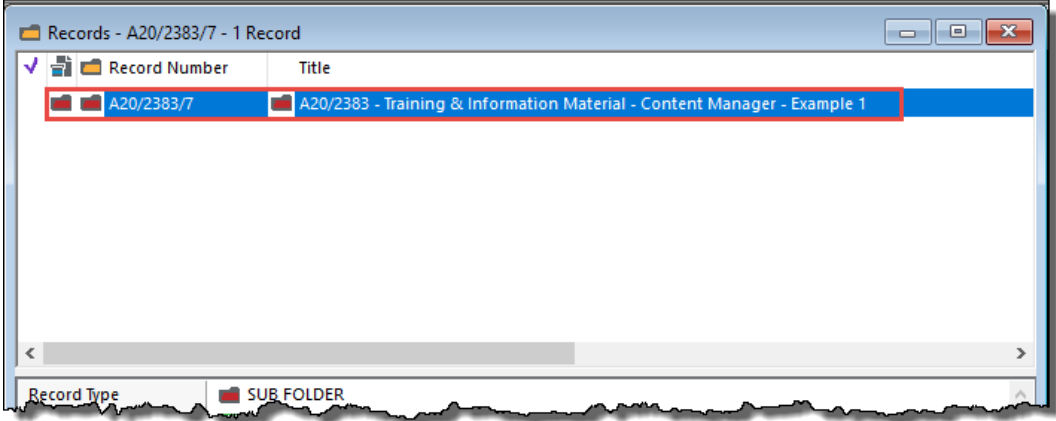
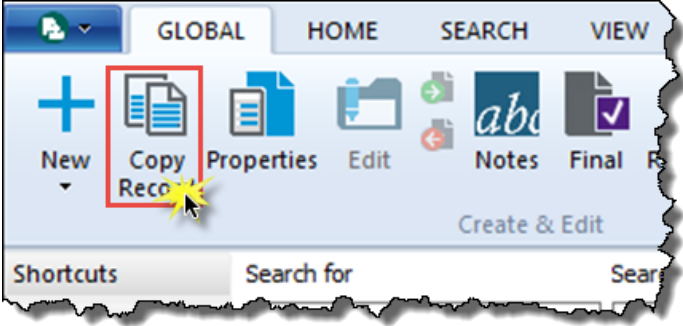


Step	TRIM Desktop – Managing Records – Create a New Sub folder
	<p>Sub Folder Naming Conventions</p> <p>The format is as follows...</p> <p>Parent Container Record Number – Subject/s – Specific Sub Folder Topic</p> <p>So in this example...</p> <p>A20/2383 (Container Number) - Training & Information Material (Subject Part 1) - Content Manager (Subject Part 2)- Example 1 (Specific Sub Folder Topic)</p> <p>Contact the Records Team (records@une.edu.au) if you have any questions</p>
5.	Click 
6.	<p>The Sub Folder will appear</p> 

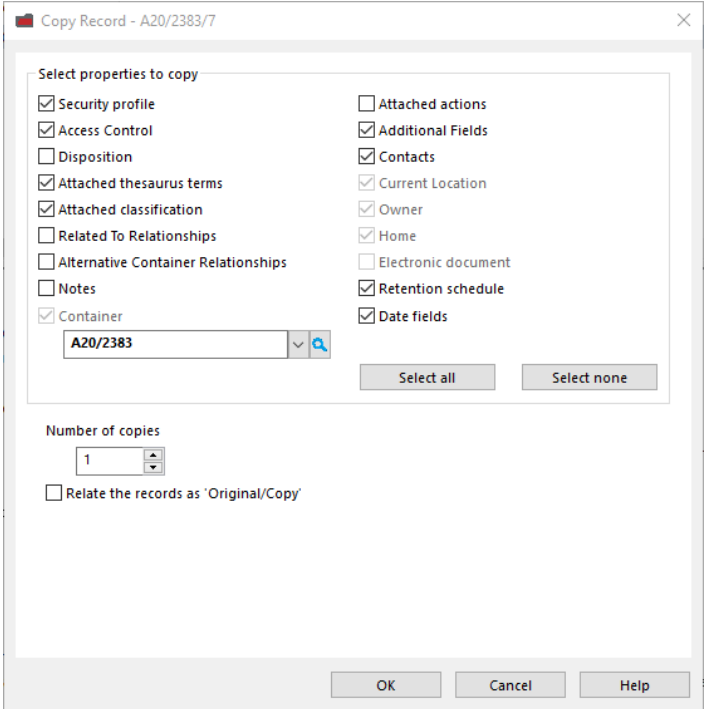

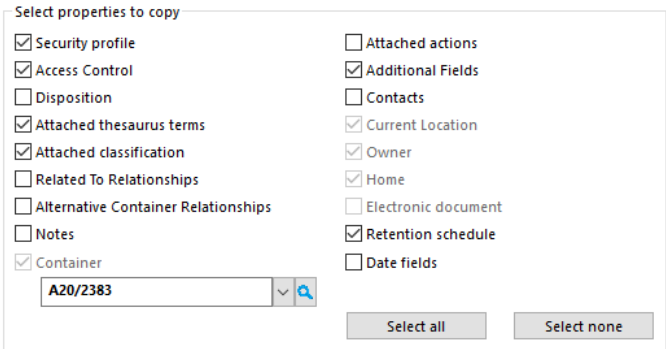


Copy a New Sub folder


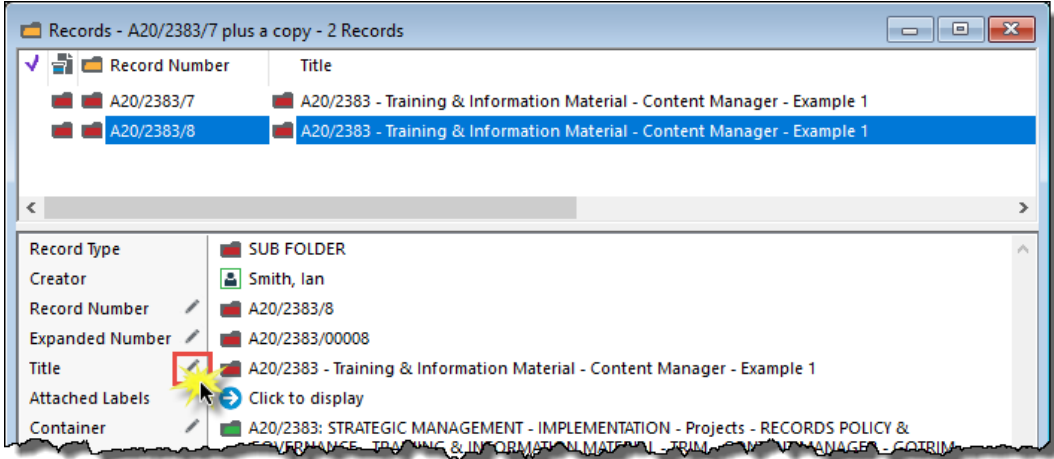
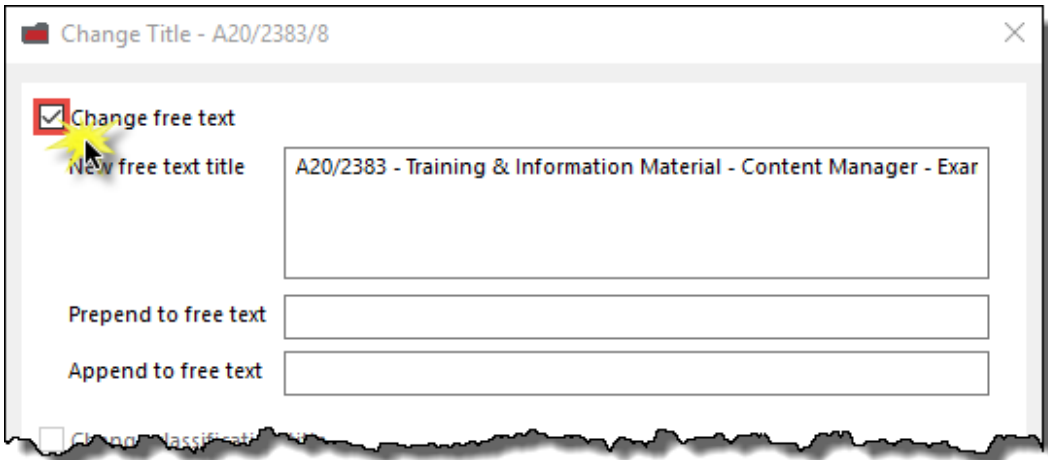
If you have an existing sub folder in a Container it's often easier to simply copy the existing sub folder.

Step	TRIM Desktop – Managing Records – Copy a New Sub folder
1.	<p>Locate the existing Sub Folder you want to copy - in this example, I will be using A20/2383/7.</p> 
2.	<p>Highlight the existing Sub Folder and Click on</p> 

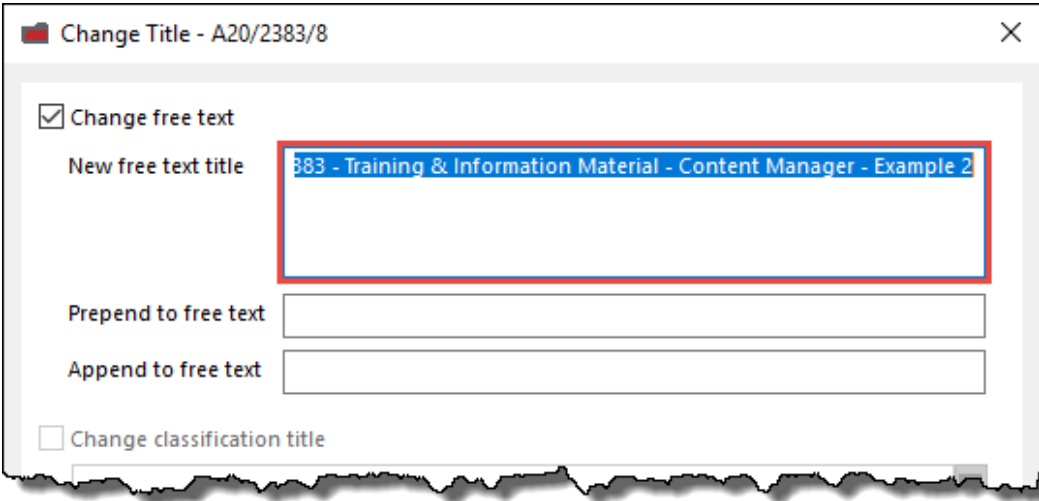
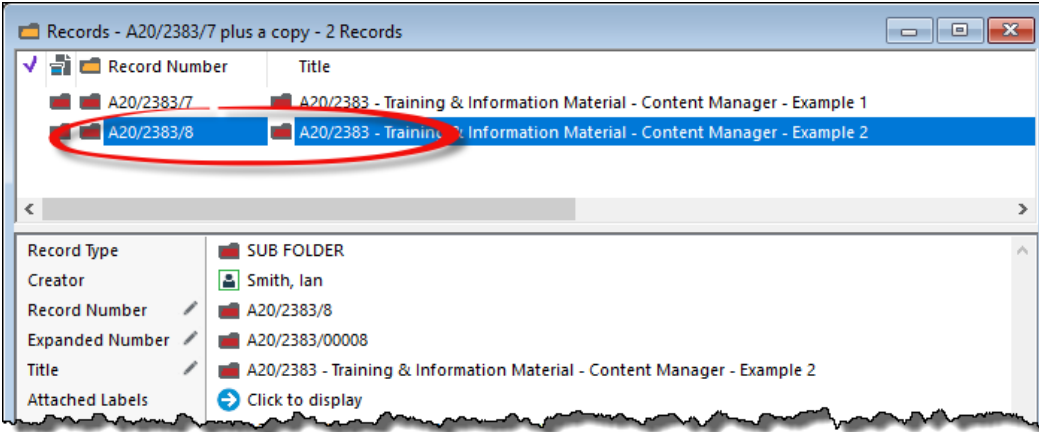


Step	TRIM Desktop – Managing Records – Copy a New Sub folder
3.	<p>The Copy Record window will appear.</p> 
	<p>Only the tick boxes shown here are to be selected. Once selected they will be your default.</p>  <p>In particular, ensure that <input type="checkbox"/> Relate the records as 'Original/Copy' is NOT selected</p>
4.	<p>You can create multiple copies in one go by changing the number in Number of copies</p> <p><input type="text" value="1"/> , but in this example we will only create 1 new copy</p> <p>Click <input type="button" value="OK"/>.</p>



Step	TRIM Desktop – Managing Records – Copy a New Sub folder
5.	<p>The old and new Sub folders will appear in a new window. You now need to update the new folder as appropriate. Select the new sub folder and Click on the  for Title</p> 
6.	<p>The Change Title window will appear</p>  <p>Select the <input checked="" type="checkbox"/> Change free text</p>



Step	TRIM Desktop – Managing Records – Copy a New Sub folder
7.	<p>Update just the Sub folder specific portion of the Title</p> 
8.	<p>The new Sub Folder is now ready to use.</p> 



Module 5 – Desktop Client – Managing Records in TRIM – Outlook Integration

TRIM integrates exceptionally well with Outlook, not only can you simply drag and drop an email or an attachment on an email but you can also:

- 💡 Save emails to TRIM as you send them
- 💡 Create links to TRIM for your most common TRIM containers
- 💡 Link Outlook folders to TRIM Containers
- 💡 Attach TRIM References and documents to Emails without opening TRIM
- 💡 View Record Numbers of Emails saved to TRIM

In addition to these topics we will also look at...

- 💡 basic trouble shooting for TRIM in Outlook



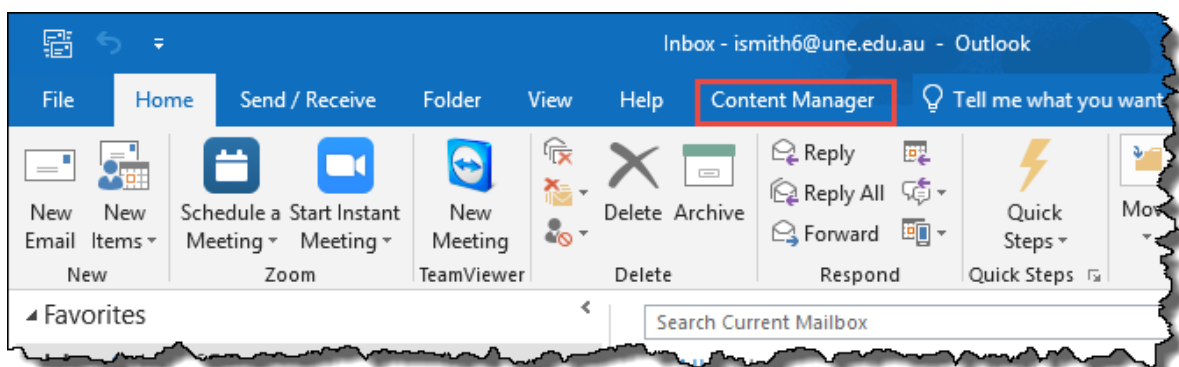
TRIM Options in Outlook



To have the integration with Outlook you must have a TRIM log in and TRIM (Content Manager) installed on the computer you are using.

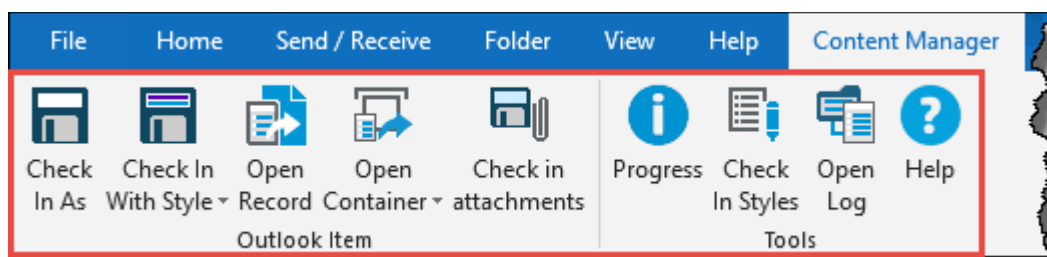
The integration does not work with the Outlook Web App.

The best way to confirm that you can utilise the integration is to confirm you have the Content Manager Tab.



See Basic Trouble Shooting if you have TRIM installed on your computer and the Tab doesn't appear.

There are a number of great options in the Content Manager Tab.

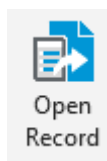




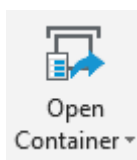
Use this button to save an email into TRIM



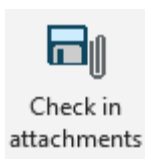
Save into TRIM using a 'Check in Style' or template with a defaulted TRIM Container



By highlighting an email already saved to TRIM and clicking Open Record, the Properties Tab will open (without all of TRIM opening as well). This is a quick and easy way to update the Title of an email in TRIM if you forgot to do it when saving originally



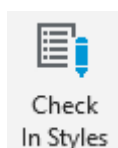
When you have a Linked folder in Outlook you can highlight it and click the Open Container Button TRIM will open at that container



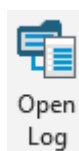
Sometimes you only want to check in an attachment, this button will allow you to do that without separating the attachment first.



View the progress of Outlook interacting with TRIM




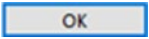
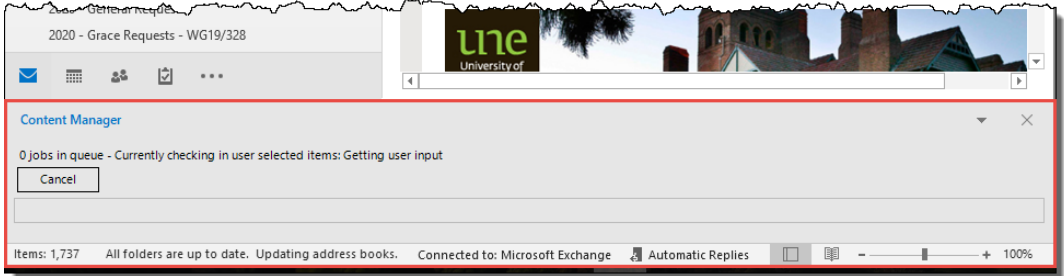
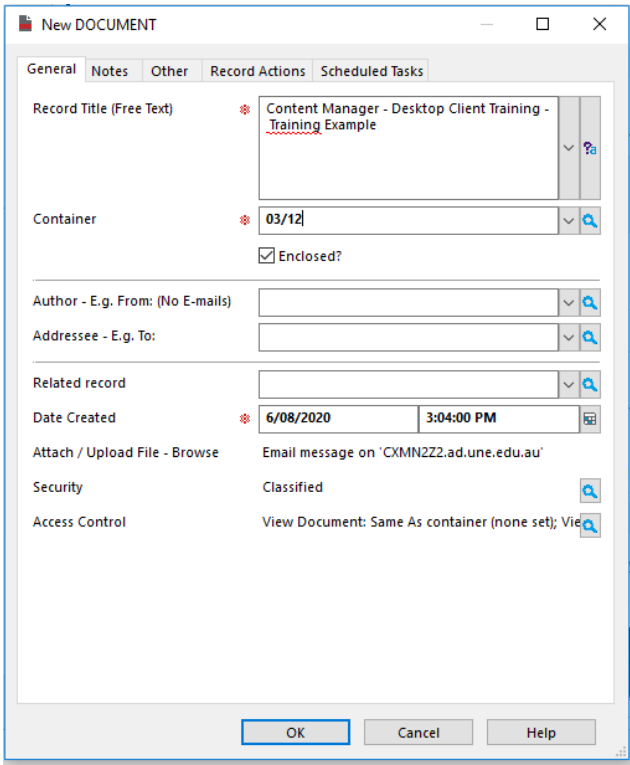
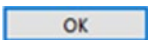
Manage the Check in Styles (or Templates) that you have in Outlook for saving emails to TRIM




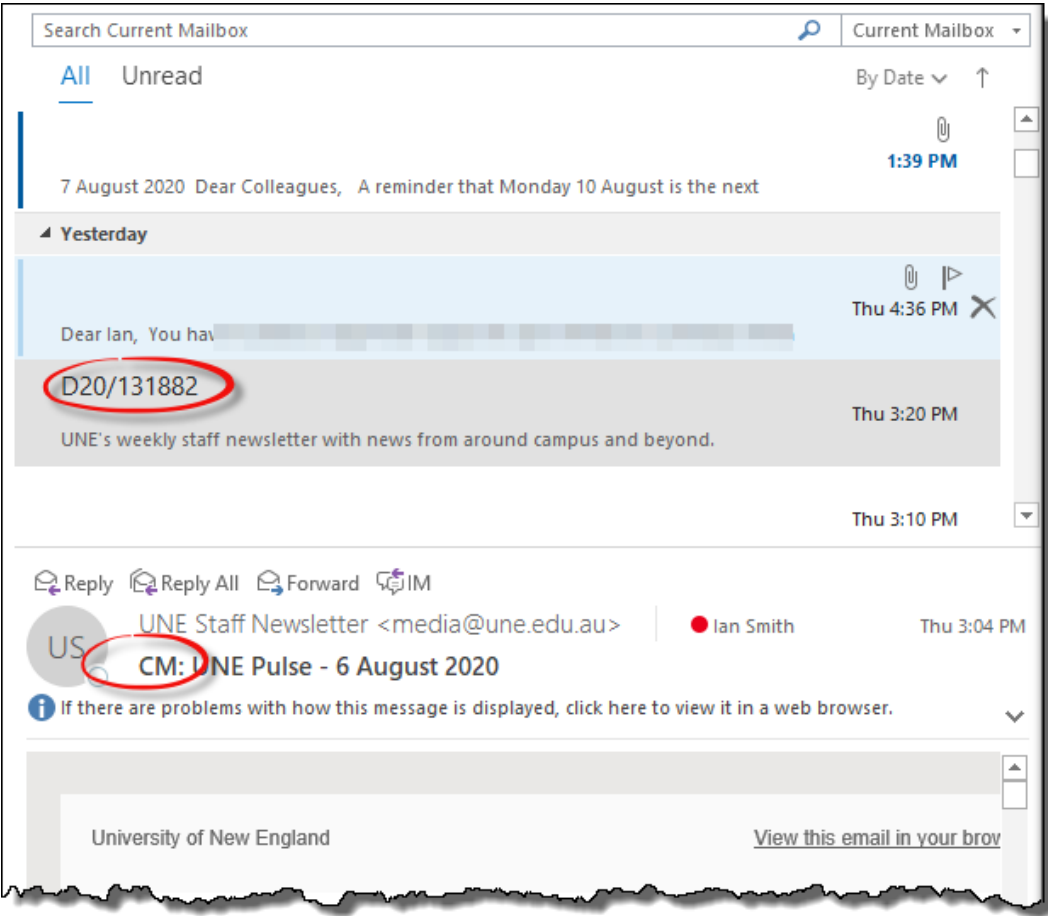
View the transactions that have occurred in the integration – you may be asked to provide this information if the Records Team are trying to investigate an issue



Check in as (Save an email to TRIM)

Step	TRIM Desktop – Managing Records – Outlook Integration – Check in As
1.	<p>Locate the document you need to update</p>  <p>Locate the email you want to save and Click on</p>
2.	<p>The ‘Select from Record Types’ window will appear. Select the appropriate option and Click </p>
3.	<p>A progress bar will appear at the bottom of the Outlook window.</p> 
4.	<p>As well as the New Document Window, complete the appropriate options</p>  <p>Click </p>



Step	TRIM Desktop – Managing Records – Outlook Integration – Check in As
	<p>It is important to name the email correctly. Emails are often sent, forwarded, replied, forwarded again etc the content can change and the original subject line may not be what the email ends up being about.</p> <p>Also, sometimes perhaps when we are in a hurry, we might make a very short, non-descriptive subject which will possibly make it very hard to find the email in the future.</p> <p>Check that the title is appropriate and can be found at a later time.</p>
5.	<p>The Progress bar will disappear and a couple of things will happen to the email in Outlook.</p>  <p>If you have added the CM Record Number as a Column (see below) it will appear and the letters 'CM' will be added at the beginning of the Subject Line.</p>


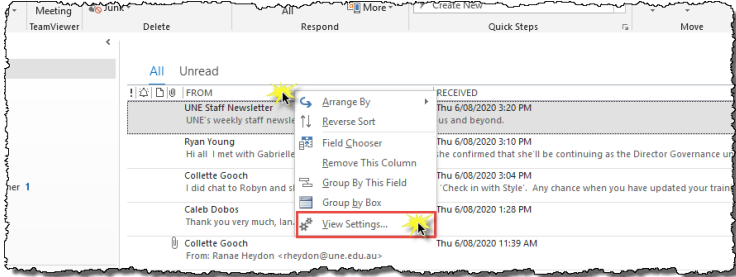
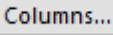
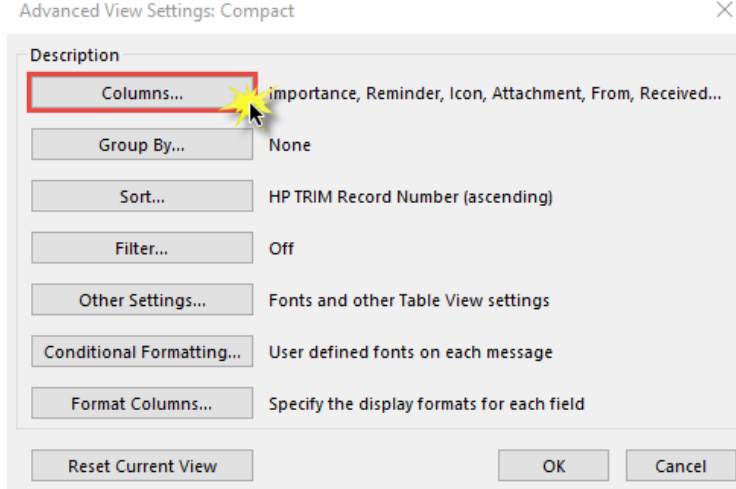
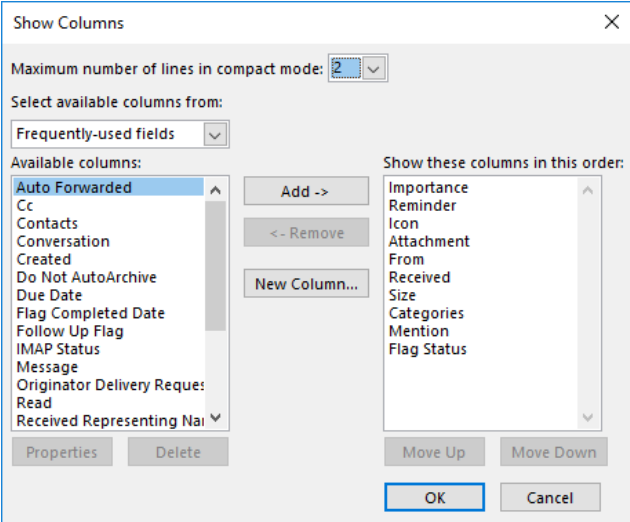
Records, Policy & Governance

TRIM – Content Manager

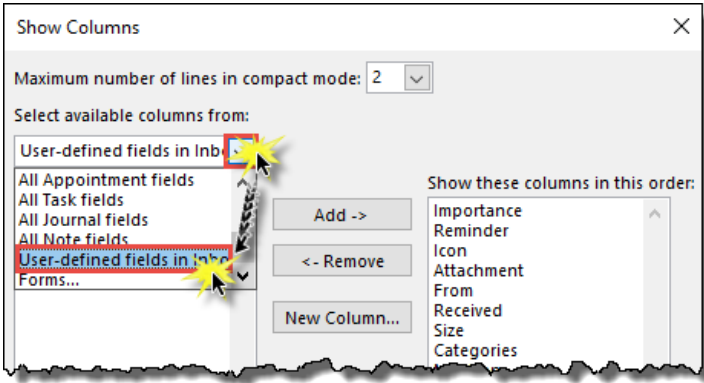
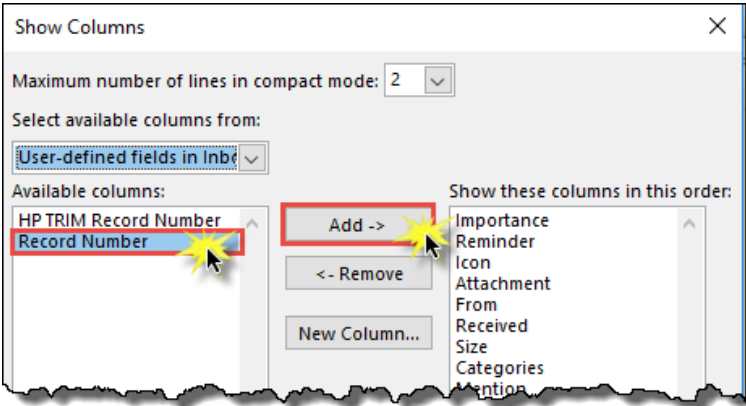
Desktop Client - User Guide



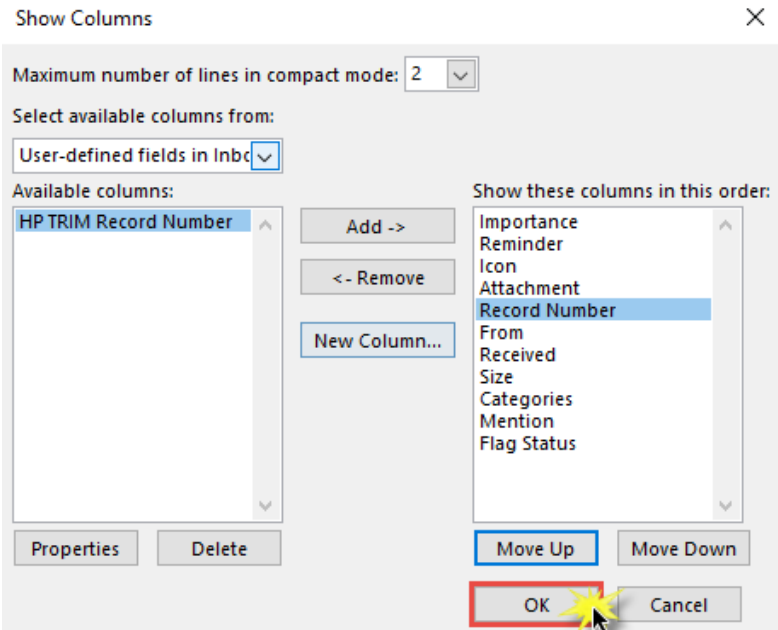
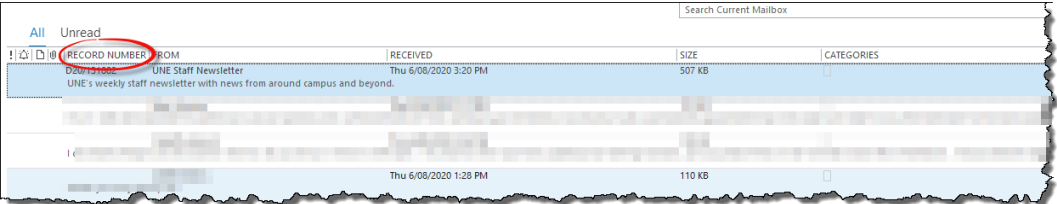
Adding the CM Record Number Column

Step	TRIM Desktop – Managing Records – Outlook Integration – Add the CM Record Number Column to Outlook
1.	<p>Right Click on the Column Headers in Outlook and select  <u>V</u>iew Settings...</p> 
2.	<p>The Advanced View Settings: Compact window will appear, click on </p> 
3.	<p>The Show Columns window will appear</p> 



Step	TRIM Desktop – Managing Records – Outlook Integration – Add the CM Record Number Column to Outlook
4.	<p>In the Select available columns from, find the User-defined fields in inbox option (Hint: You may have to scroll the very bottom of the drop down)</p> 
5.	<p>Select Record Number from the Available Columns and Click</p> <p>Add -></p> 
6.	<p>Record Number will appear in the 'Show these columns...' in the order selected. You can change the order by selecting</p> <p>Move Up Move Down</p>

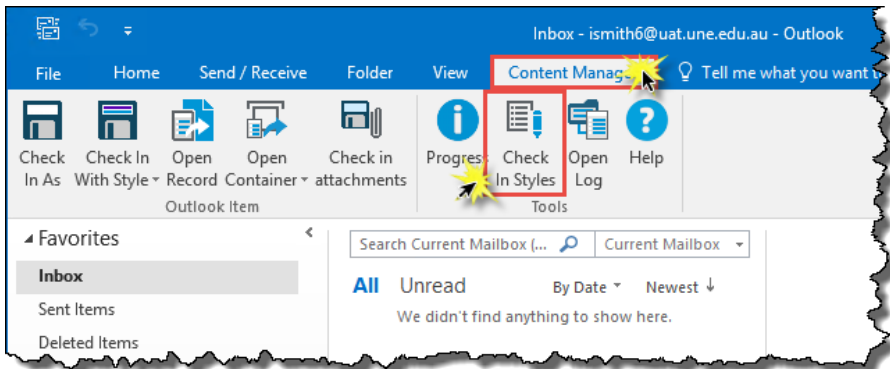
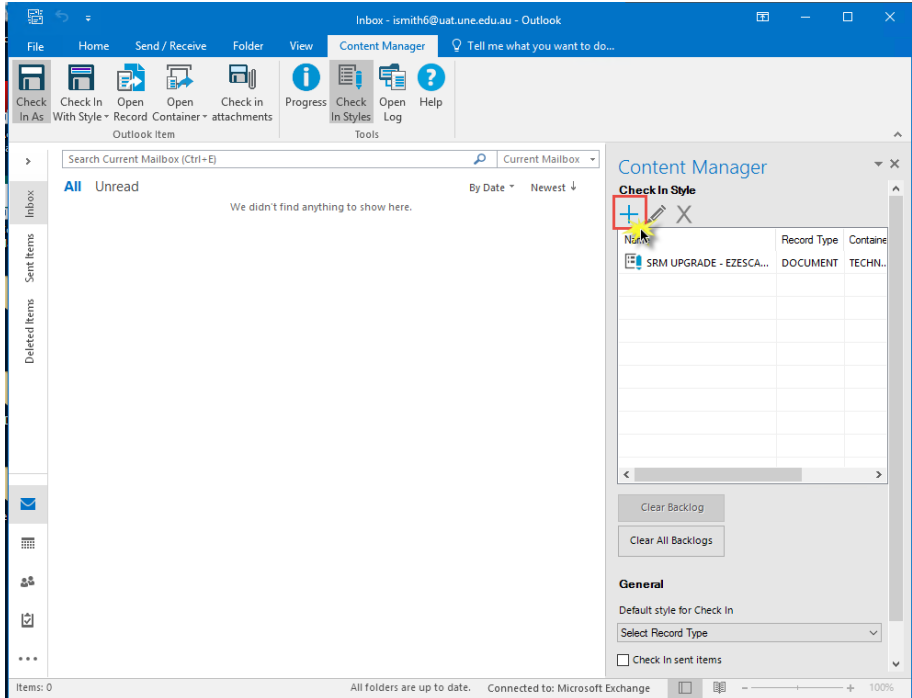


Step	TRIM Desktop – Managing Records – Outlook Integration – Add the CM Record Number Column to Outlook
7.	<p>Once you are happy simply click OK</p> 
8.	<p>Then Click OK on the Advanced View Settings: Compact window.</p>
9.	<p>You will now have the Record Number Column. Any email that has been saved to TRIM by you will display the Record Number</p> 

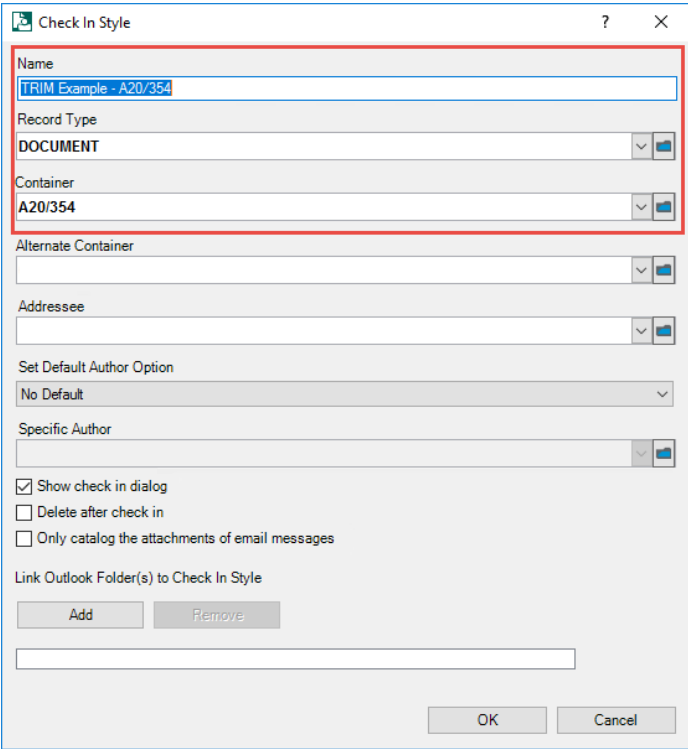








Check in Styles

Check in Styles are a type of Template where you can preselect things like the container they will be saved to and the Document Type as well as use the Check in Style to link to a sub folder in Outlook.

Step	TRIM Desktop – Managing Records – Outlook Integration – Add the CM Record Number Column to Outlook
1.	<p>Go to Content Manager Ribbon and Click on</p> 
2.	<p>The Content Manager – Check in Style panel will appear click on the</p> 



Step	TRIM Desktop – Managing Records – Outlook Integration – Add the CM Record Number Column to Outlook
3.	<p>The new Check in Style Window will appear. Complete the Name, Record Type and Container fields</p> 
	<ul style="list-style-type: none">  You can set the record to also ‘appear’ in another container (please talk to Records if you want to know more)  Addressee does not need to be completed  The ‘Show check in dialog’ radio button should be ticked  The ‘Delete after check in’ radio button is optional. By ticking this option your email will be moved to the deleted box in Outlook  You can choose to only file the attachments of the emails by ticking the ‘Only Catalogue the attachments of email messages’
4.	<p>Once created the Check in Style Can be used to save emails to TRIM in a quick and easy way – See ‘Using a Check in Style’ below</p>



Using a Check in Style


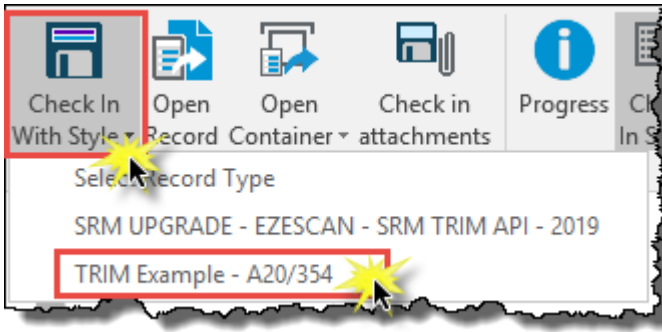
Check in Styles speed up saving records to TRIM by having a template that reduces how many fields you need to complete.



Ideally, Check in Styles are used where you have a Container in TRIM that you need to save to on a consistent basis. For instance, if you are working on a Project then you might find a high percentage of your emails have to be saved into the Project File in TRIM

If you are saving records to individual student records there may be limited value in using a Check in Style.

Please talk to the Records Team if you have any questions about how best to use Check in Styles.

Step	TRIM Desktop – Managing Records – Outlook Integration – Using Check in Styles
1.	Select the email you wish to save.
2.	In the Content Manager Ribbon, click on  Check In With Style ▾
3.	You can select the one you want (in this case TRIM Example – A20/354 or Click on Select Record Type) 
4.	The New Document window will appear - you will have to name the Record in accordance with naming rules.

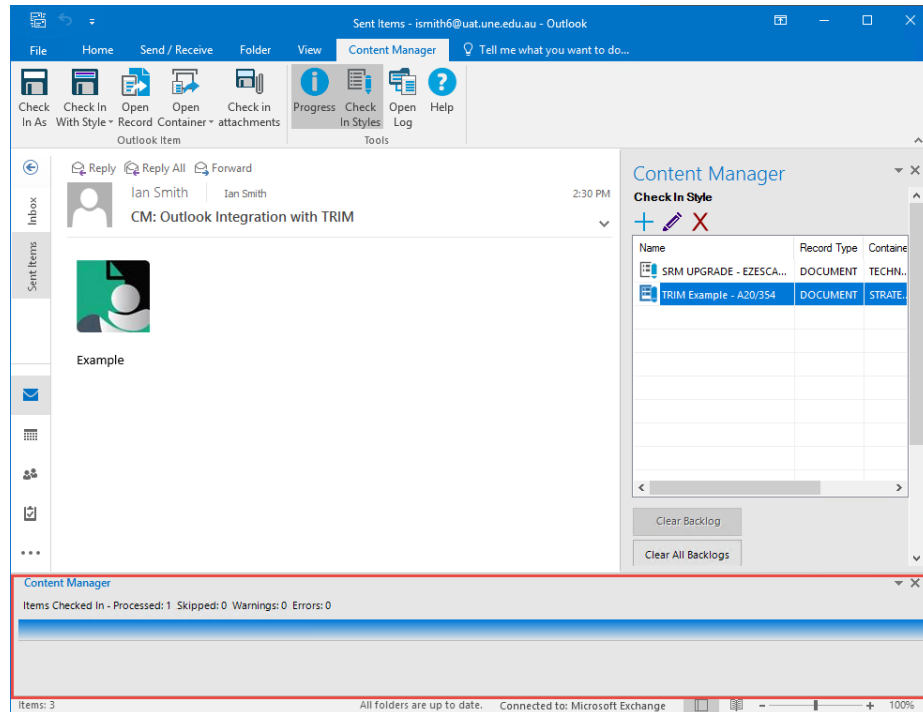


Step

TRIM Desktop – Managing Records – Outlook Integration – Using Check in Styles

5.


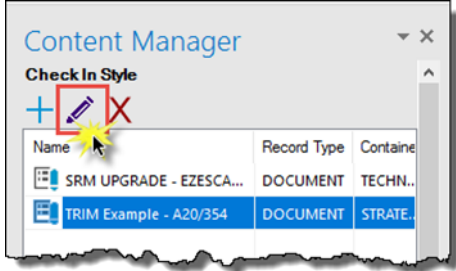

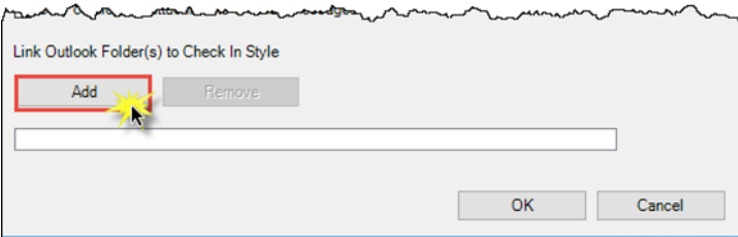
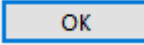
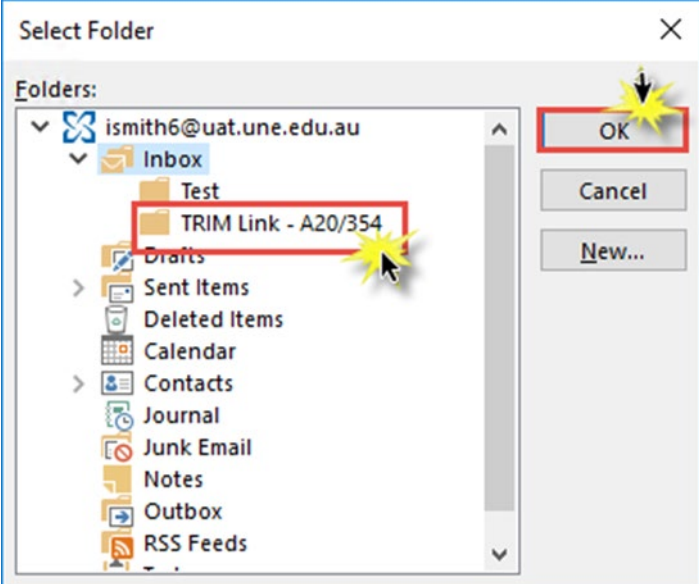
The Content Manager Progress Bar will confirm the activity is complete



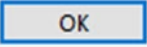
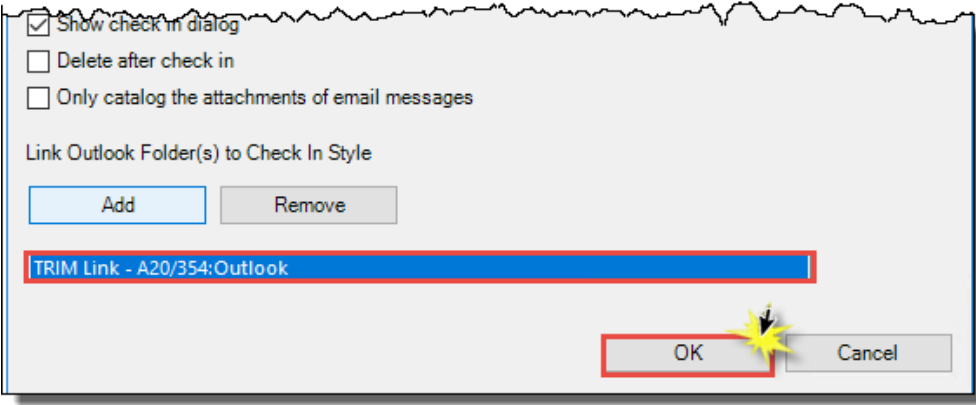
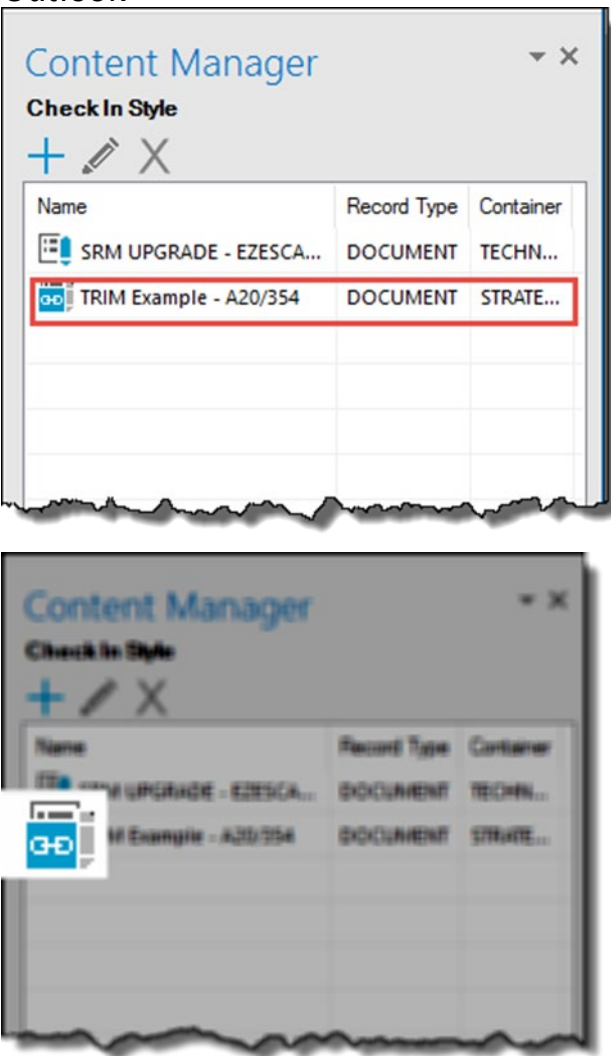


Linking an Outlook Subfolder with a Check in Style

By linking an Outlook Subfolder to a Check in Style you are able to sort the emails in Outlook and at the same time save them into TRIM.

Step	TRIM Desktop – Managing Records – Outlook Integration – Linking an Outlook Subfolder with a Check in Style
1.	<p>If you want to connect an existing Check in Style simply click on the edit option  in the Content Manager Window in Outlook</p> 
2.	<p>Then click on</p>  
3.	<p>Use the Select Folder window to allocate the required folder in Outlook. Highlight the folder and click </p> 

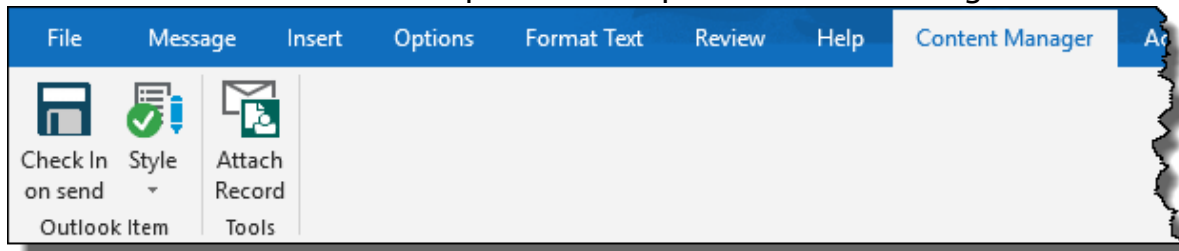


Step	TRIM Desktop – Managing Records – Outlook Integration – Linking an Outlook Subfolder with a Check in Style
4.	<p>Click  to confirm the link</p> 
5.	<p>The Check in style will now show that it is linked to the Folder in Outlook</p> 



Options when sending an Email

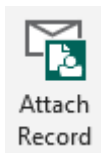
Outlook and TRIM offer a couple of neat options when sending an email



Automatically save to TRIM when you click

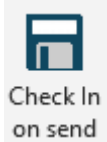
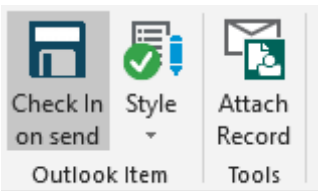


Add a specific Check in Style when selecting Check in on Send




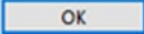


Attach Record – Attach a Reference or Document from TRIM

Check in on Send and Style

Step	TRIM Desktop – Managing Records – Outlook Integration – Check in on Send and Style
1.	<p>When you create your email go to the Content Manager Tab and</p>  <p>click on</p>
2.	<p>The button will go grey indicating it has been activated</p>  <p>Complete your email and send, or go to step 3 to add a Check in Style</p>



Step	TRIM Desktop – Managing Records – Outlook Integration – Check in on Send and Style
	<p>If you choose not to use a Check in Style you will need to add the Record Type and Container before saving</p>
<p>3.</p>	<div data-bbox="459 421 539 555" data-label="Image"> </div> <p>Click on  and your Check in Styles will display as a list.</p> <p>Select the Check in Style you wish to use.</p> <div data-bbox="416 696 1273 1263" data-label="Image"> </div>
<p>4.</p>	<p>Complete the email and click </p>
<p>5.</p>	<p>The New Document Window will appear and the defaults you have selected will appear. Check the title, update as required and click </p> <p>The email has now been saved to TRIM.</p>



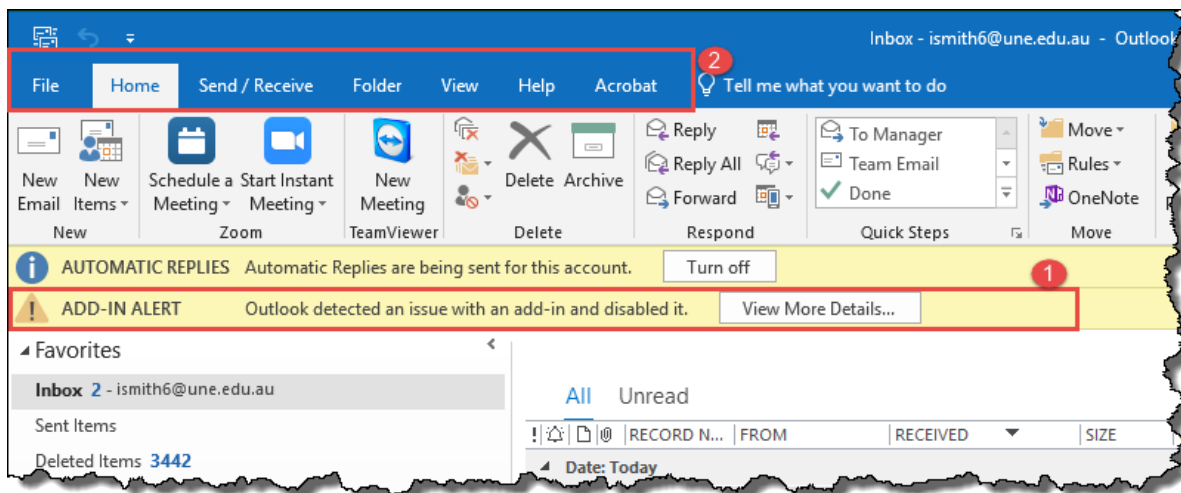
Lesson 2

Simple Troubleshooting

There are some common issues that do occur with the Outlook/Content Manager integration and they are nearly always easily fixed.

There are a couple signs that the Outlook/Content Manager integration is not working...

1. An Add-in Alert may appear; and/or
2. The Content Manager tab is not visible.

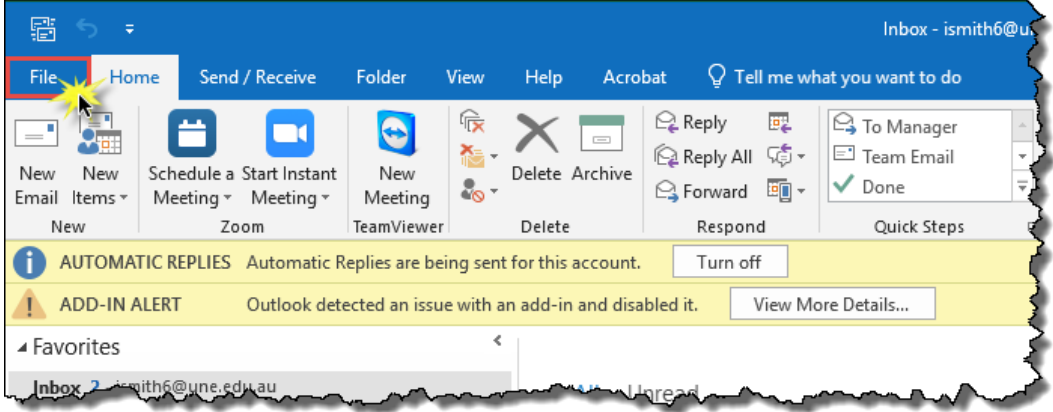
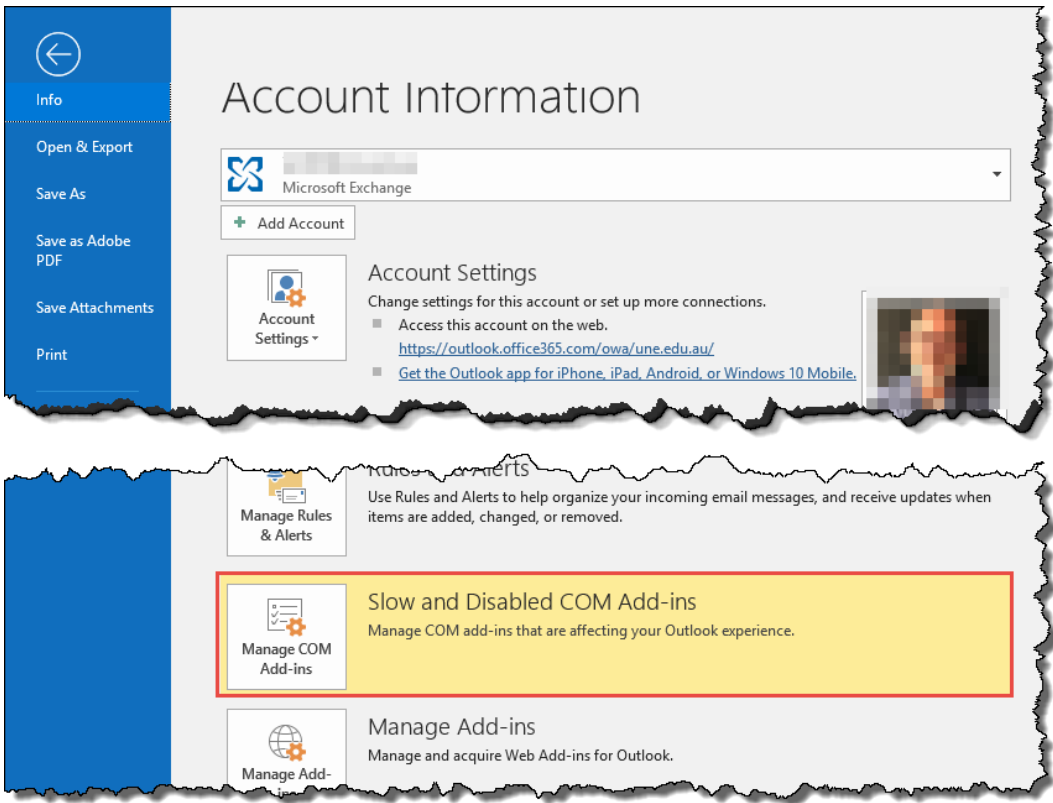


Follow the instructions below to restart the Add-in.



You may have to restart Outlook (or it may restart itself). Ensure that you have saved any drafts before proceeding.



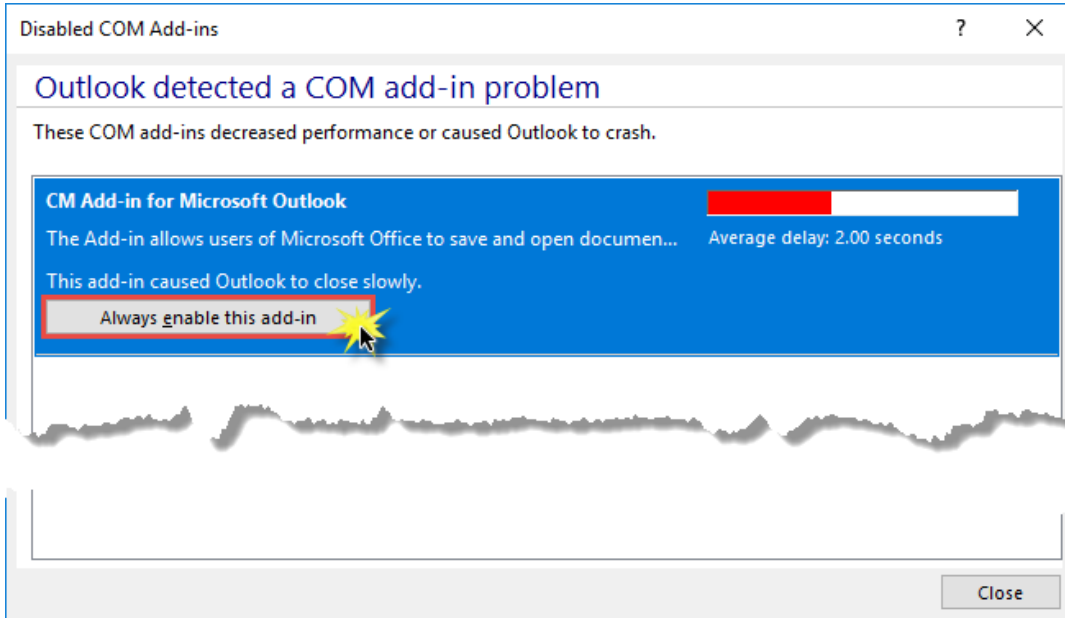

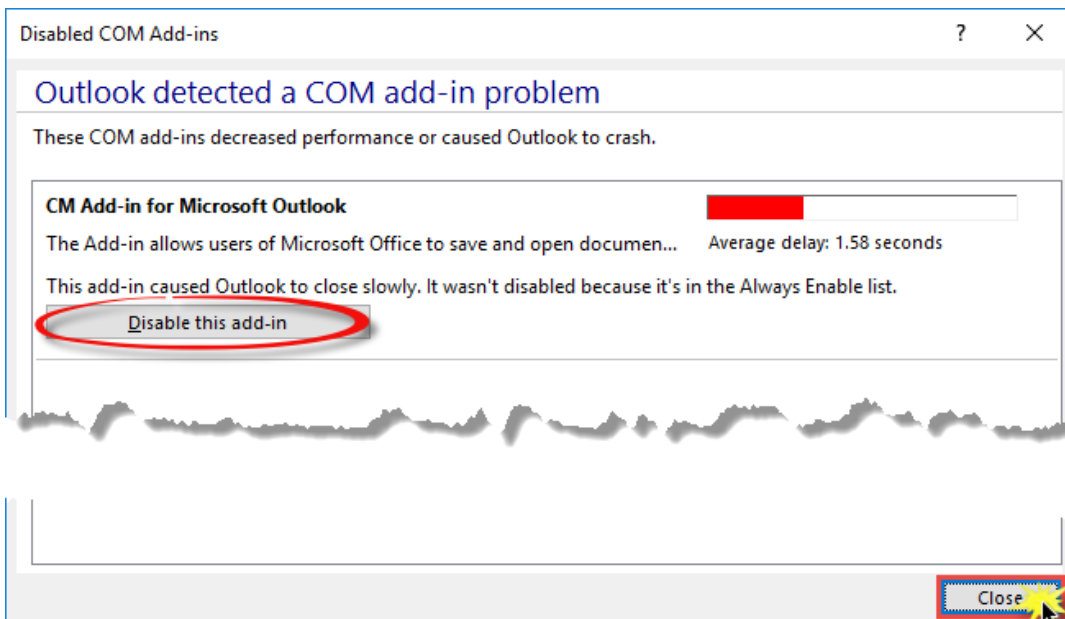
Step	TRIM Desktop – Managing Records – Outlook Integration – Disabled Content Manager Add-in
1.	<p>In Outlook, click on the File Tab</p> 
2.	<p>The Account Information page will appear. You may see that the Slow and Disabled Com Add-ins is highlighted.</p> 

Records, Policy & Governance


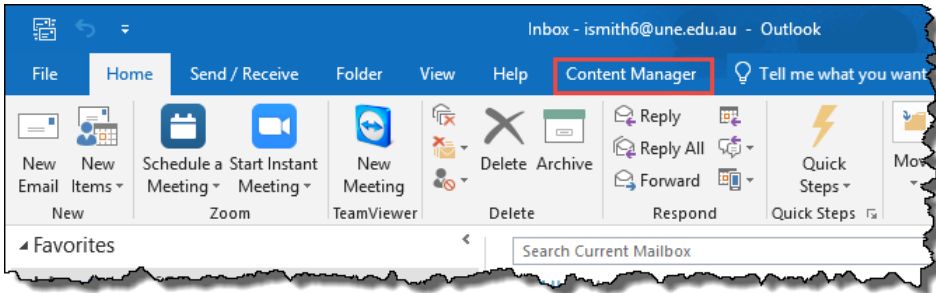
TRIM – Content Manager

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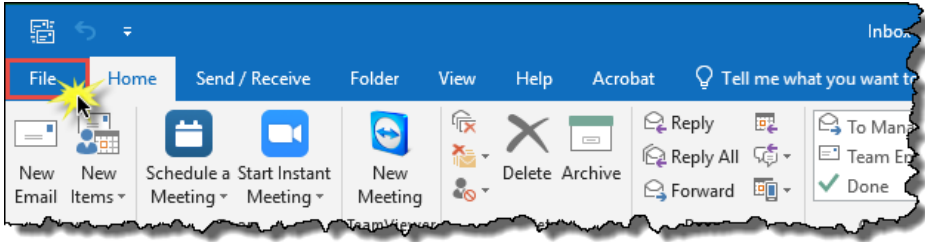
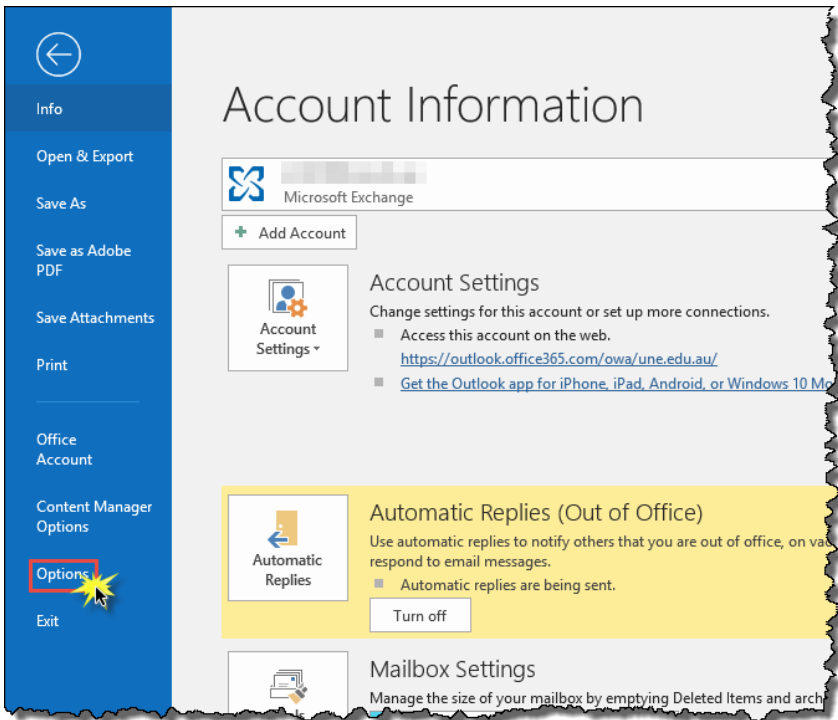
Step	TRIM Desktop – Managing Records – Outlook Integration – Disabled Content Manager Add-in
3.	<p>The Disabled COM Add-ins windows will appear. Click on the Always enable this add-in button.</p> 
	<p>This may take a few seconds to change, do not click multiple times.</p>
4.	<p>The button has now changed to Disable this add-in</p> <p>Click Close</p> 



Step	TRIM Desktop – Managing Records – Outlook Integration – Disabled Content Manager Add-in
5.	<p>Use the  to return to Tabs view, the Content Manager Tab should now appear</p> 

If you don't have the Disabled Add-in warning and/or you still can't see the Content Manager Tab after enabling the Add-in you have to complete the Restarting the Content Manager Add-in process.



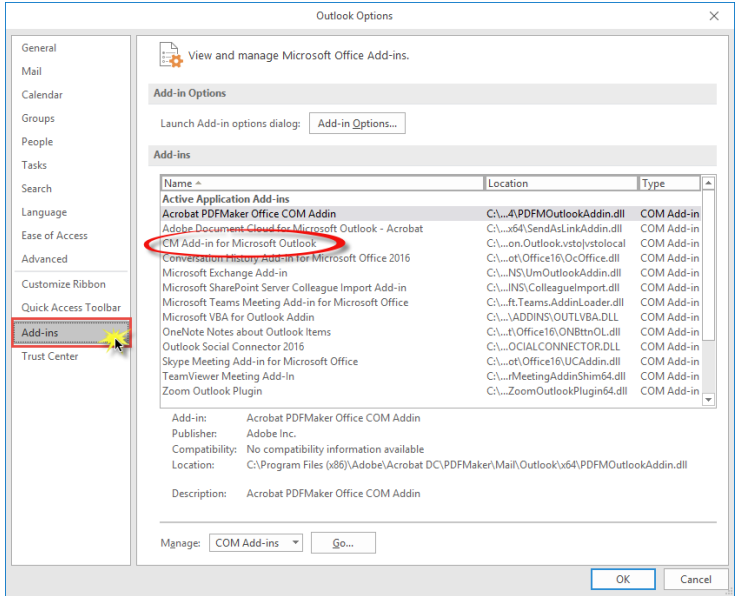

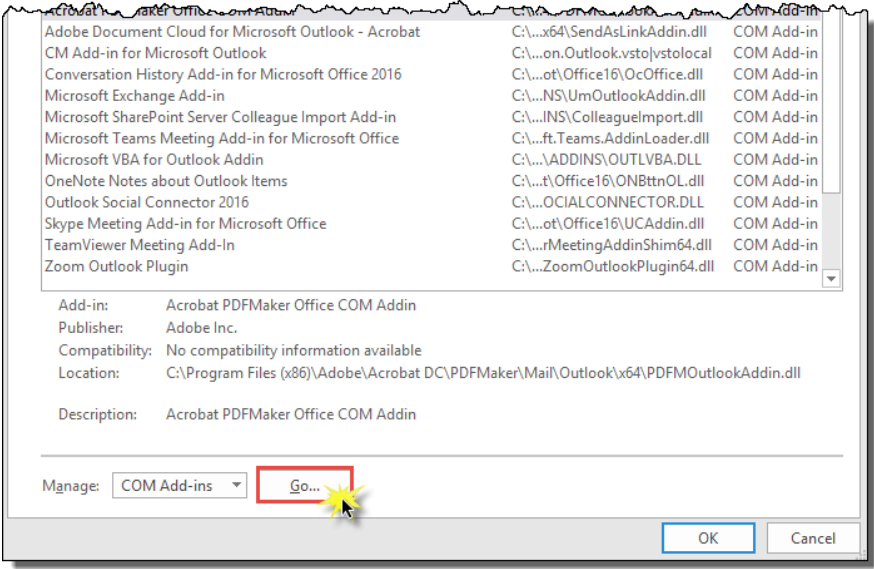
Step	TRIM Desktop – Managing Records – Outlook Integration – Restarting the Content Manager Add-in
1.	<p>In Outlook, click on the File Tab</p> 
2.	<p>The Account Information Page will appear, click on Options</p> 

Records, Policy & Governance

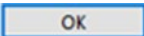
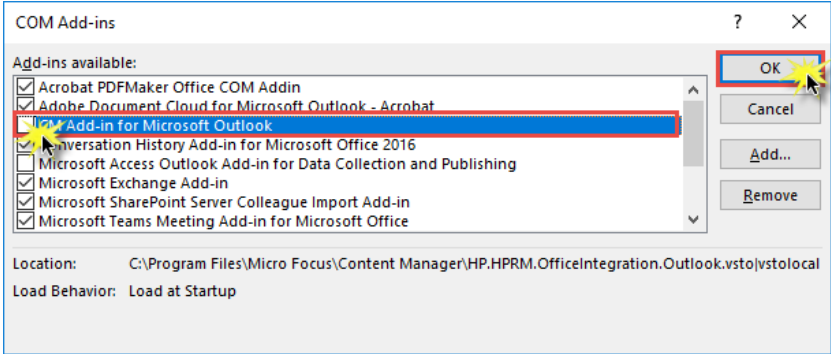

TRIM – Content Manager

Desktop Client - User Guide



- Step** **TRIM Desktop – Managing Records – Outlook Integration – Restarting the Content Manager Add-in**
3. The Outlook Options window will open, click on the Add-ins link and the list of Add-ins currently operating will appear. In this example we can see that the CM Add-in is installed.
- 
4. Click on the  button to Manage COM Add-ins
- 



Step	TRIM Desktop – Managing Records – Outlook Integration – Restarting the Content Manager Add-in
5.	<p>The Comm Add-ins window will appear.</p> <p>Check that the CM Add-in for Microsoft Outlook is ticked then Click </p> 
6.	<p>Return to the Tabs view in Outlook using the .</p> <p>If the Tab still does not appear contact the Records Team.</p>