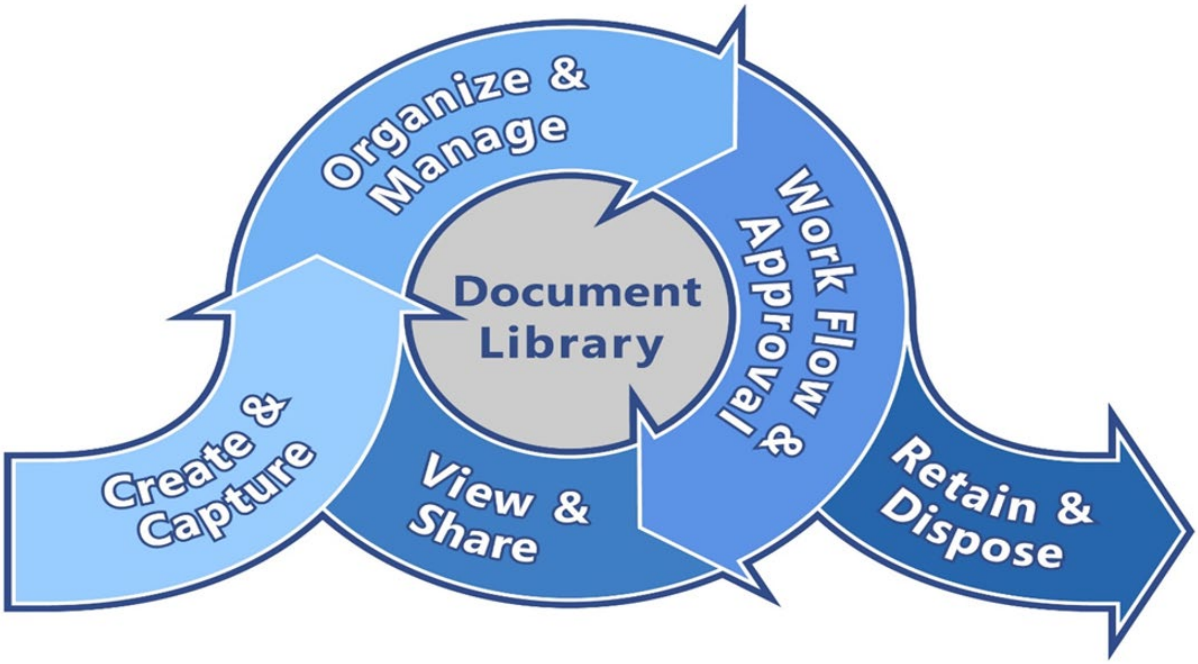
Module 1 – Lesson 1 – Recordkeeping at UNE – Why should we care about Records Management?

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…

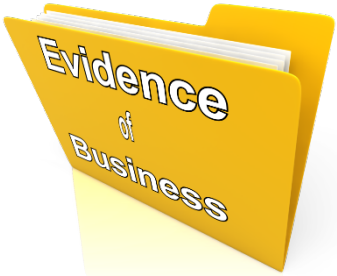
What June decides at this time could then decide the outcome of the court case.

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

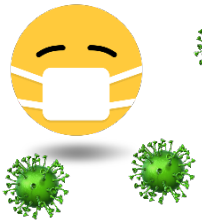
The Tertiary Education Quality and Standards Agency (TEQSA) specifies in their Contextual Overview that …

'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

Records, Policy & Governance

TRIM – Content Manager
Web Client - User Guide

Module 2 - TRIM Web Client – TOUR – Opening TRIM

To access TRIM Web Client, you must either…

1. Be connected to the UNE Network; or
2. If offsite, be connected via the VPN; and
3. Use Google Chrome as the web browser (Highly Recommended) for Windows and Firefox for Mac users.

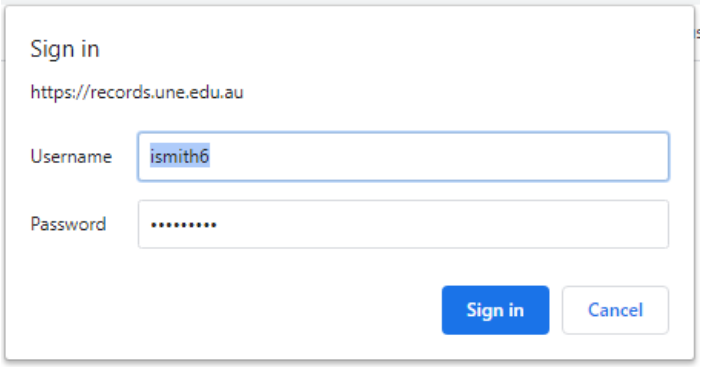
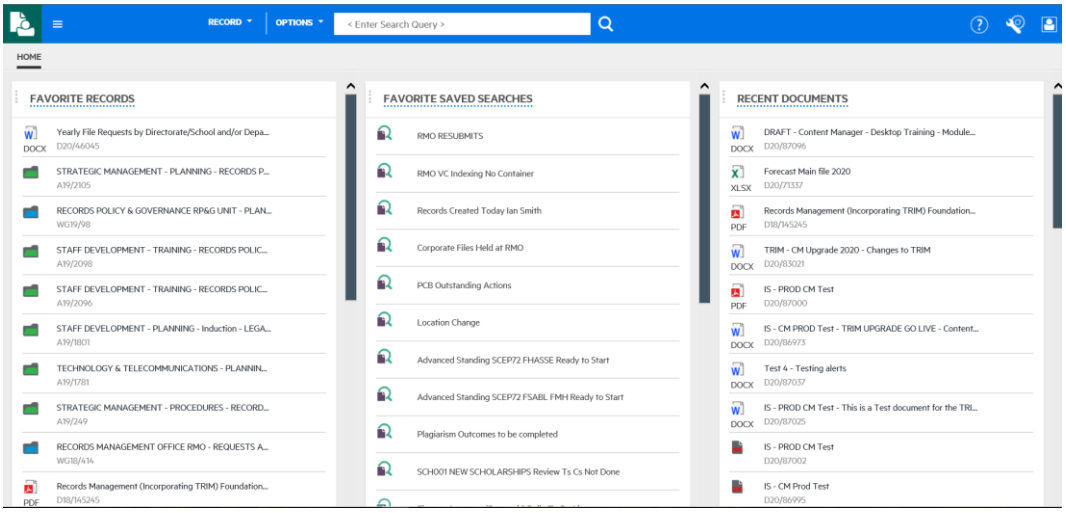
The Web Client can be used on private devices (subject to the points above), however care should be taken in downloading and viewing Corporate Records on a device that does not share the high levels of security and protection as UNE devices possess.

Please seek advice from ITD and the Records Team before using the TRIM Web Client on NON-UNE devices.

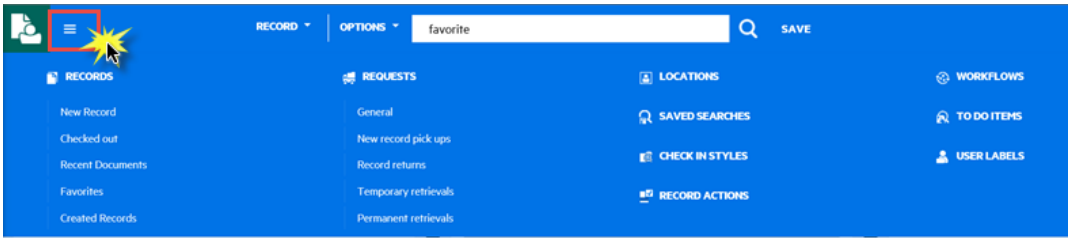
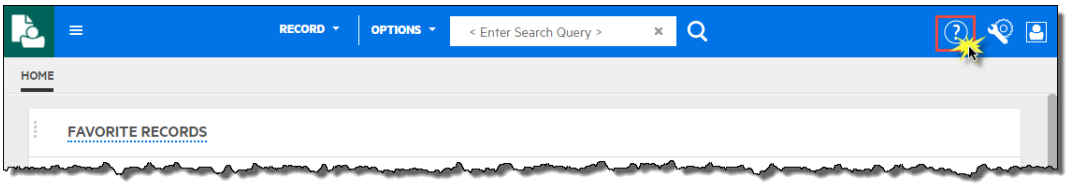
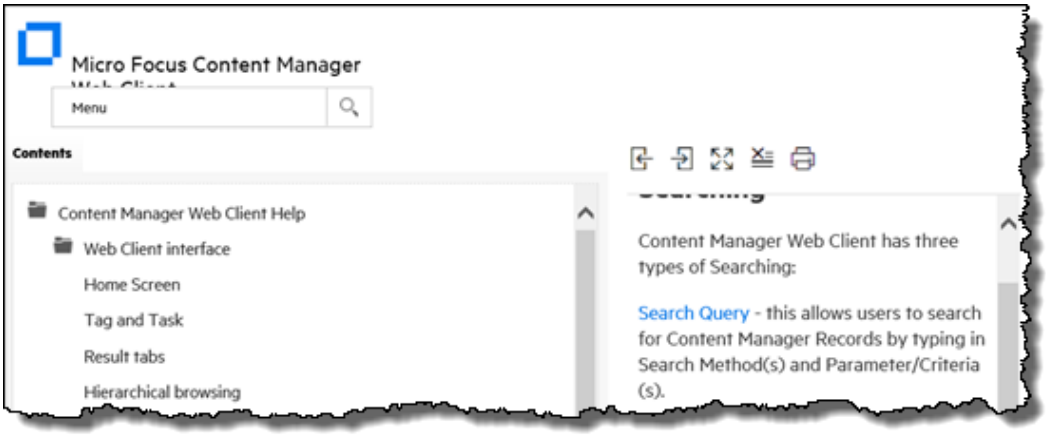
The TRIM Web client looks very different to the normal Desk top client; however, it does have all the functionality of the desktop with the freedom of not needing the actual software on the computer.

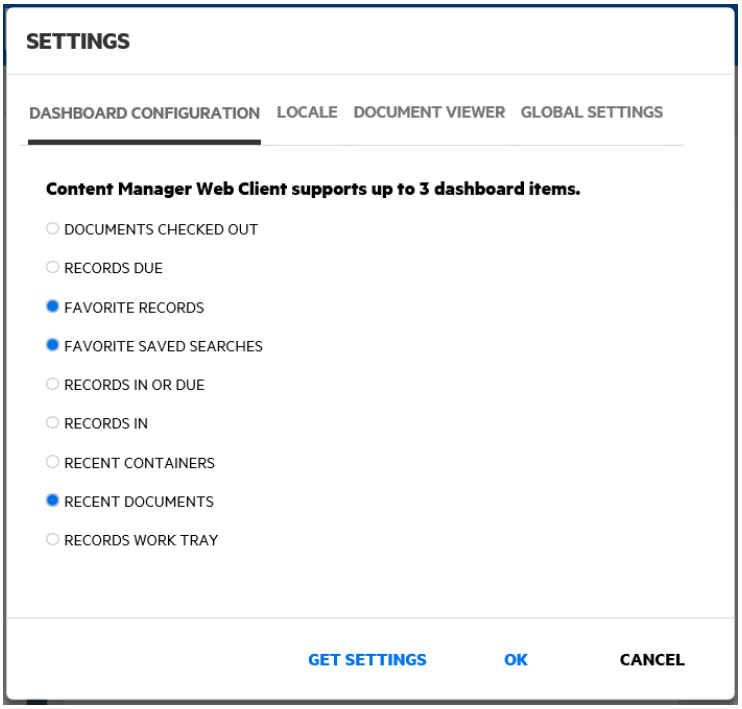
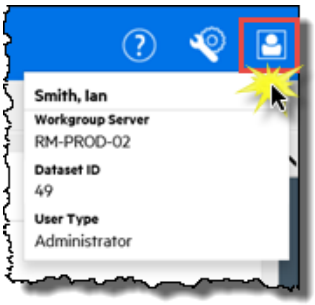
The Web Client will also automatically adjust to the size screen and can be used on tablets and phones with larger screens.

TRIM Web Client – Tour – Opening the Web Client

Step	TRIM Web Client – Tour - Opening the Web Client
1.	To access the TRIM Web Client go to https://records.une.edu.au/ContentManager The log in window will appear, simply use your UNE log in details 
2.	The Web Client will open … 
3.	**Home Screen Dashboard**– The Home screen will default to a view of your Favorite Records, Favorite Saved Searches and Recent Documents. The records that display here are the same that you will see in your Desktop version of TRIM. These can be adjusted see below for information on how to do this.

TRIM Web Client – Tour - Options

Step	TRIM Web Client – Tour - Options
1.	A number of options will appear on the Home Page (and will remain as you navigate around… **Menu Items** - a large selection of options become available when selected  This is where you can basic things like Create a New Record, get a list of documents you have Checked out and manage Check in Styles and User Labels.
2.	**Search Options** -  From here you can search using a selection of options and even save a search if it's one you want to be able to return to. Go to **TRIM Web Client - Module 3** for detailed instructions
3.	The Web Client also has a **Help Function** that may be of assistance.  

Step	TRIM Web Client – Tour - Options
4.	The Settings icon will take you to the Settings Window. The main benefit here is the ability to change the Dashboard Configuration 
	There is a maxiumum of 3 Dashboard Items that can be displayed at any time. You can have less if required  You can also change the order in which the panels appear by clicking on the (top left of the panel). The mouse will change to a four way pointer and you can then simply drag the item where you want it.
5.	Finally, by clicking on the **Profile** Icon you will display the users details in TRIM.  You may be asked to do this if troubleshooting an issue with Records or ITD.

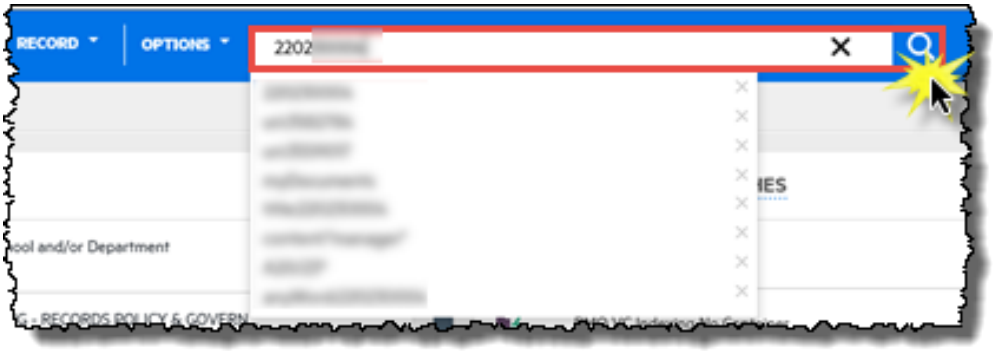
Records, Policy & Governance

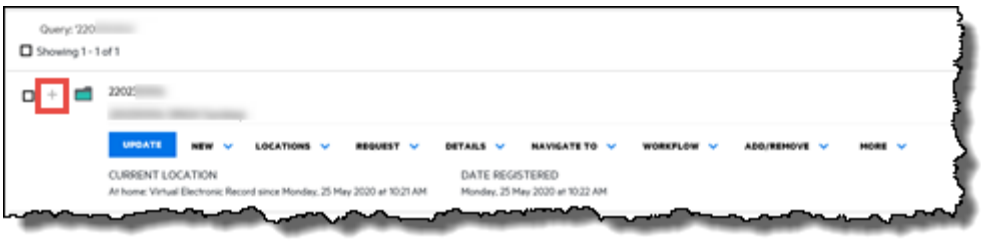
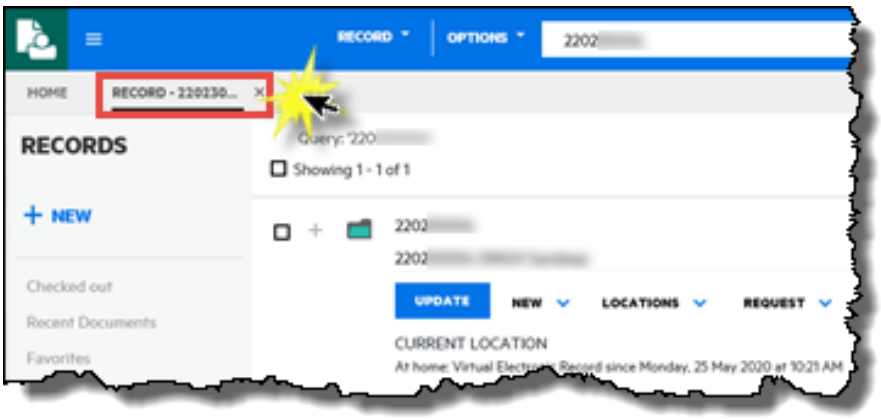
TRIM – Content Manager
Web Client - User Guide

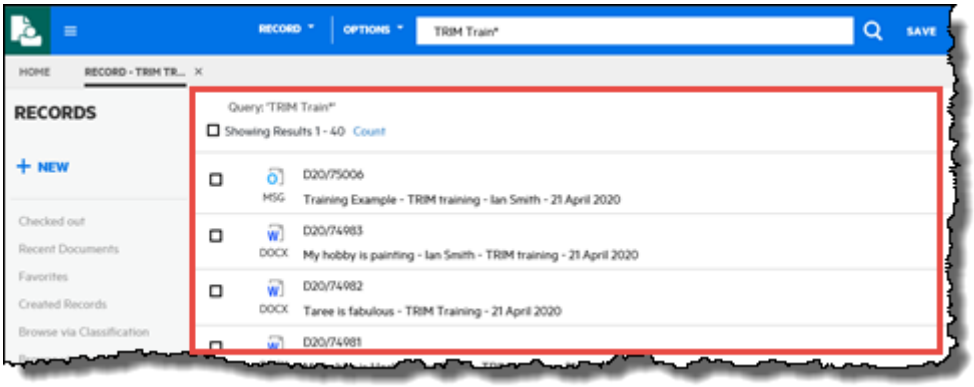
Module 3- TRIM Web Client – Searching

TRIM, whether the desktop or Web Client versions, offer a large number of options when it comes to searching. However, for most users is often a case of 'Keep it simple', so we will focus on the couple of most straightforward options initially

TRIM Web Client – Searching – Basics

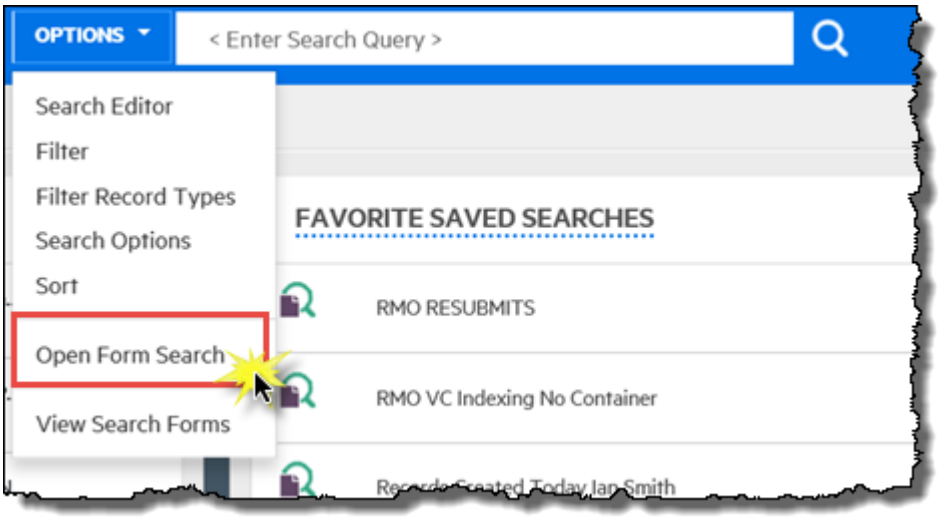
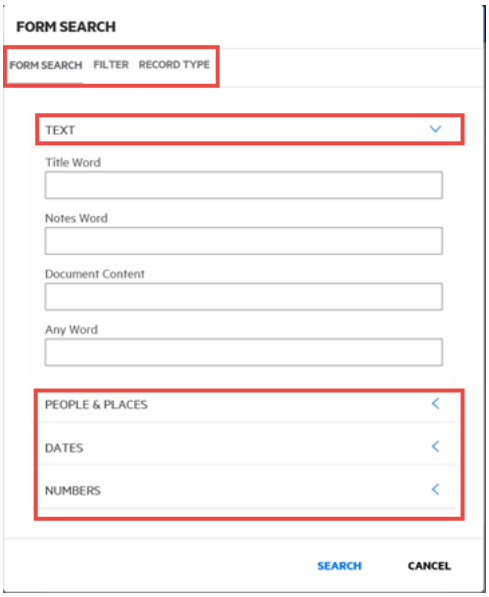
Step	TRIM Web Client – Searching - Basics
1.	If you wish to locate records by Title Words you can use the field. 
2.	So if you are searching for a Student file simply type in the Student Number and click  

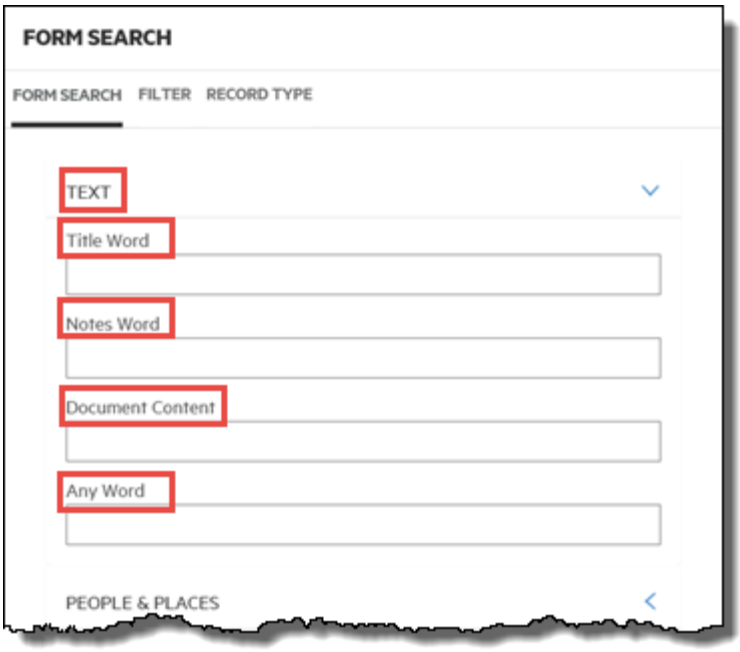
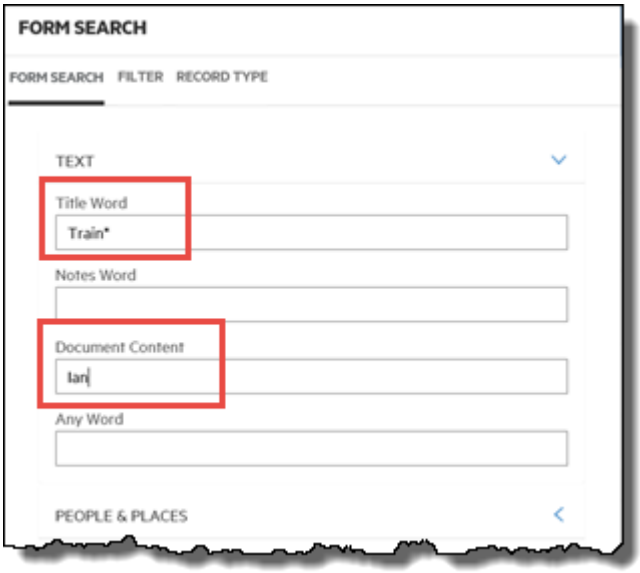
Step	TRIM Web Client – Searching - Basics
	TRIM will recognise if you have searched for the number before (recently) but will also bring up numbers that have the same beginning as you type it in.  Ensure the number is correct before proceeding.
3.	By entering the student number TRIM has searched only for the Student container and NOT all records. In this example you can see that there are records inside the container because of the + 
	You can also search for Corporate Containers by simply typing the number in e.g. A20/9999
4.	You will also notice that TRIM displays the results in a new Tab.  You can clear the tab by clicking on the x in the header

Step	TRIM Web Client – Searching - Basics
5.	If you are searching using words, TRIM will automatically search using the Title word option. Simply Type in the words you are looking for …in this example we are looking for Records with ***TRIM Train****  A Wildcard tells the system that you are looking for a pattern of characters but there may be additional characters. This is particularly useful with plural (card → cards) or other words that can have letters after the primary word. 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). You can also use multiple Wildcards both in a single word and multiple words. e.g. Single Word – '*train*', Multiple words – 'Train* Aug*' The Wildcard symbol for TRIM is the asterisk *
6.	The results will appear in the new Tab below the Search field 
	If you want to know how many Records appear in the results simply click on the 'Count' link. 

TRIM Web Client – Searching – Search Forms

TRIM Web Client has a Form Search that allows you to enter information into specific search parameters.

Step	TRIM Web Client – Searching – Search Forms
1.	Simply click on OPTIONS Then click on Open Form Search 
2.	The Form Search Window will open. There are 3 Tabs and 4 Dropdowns available for use. 

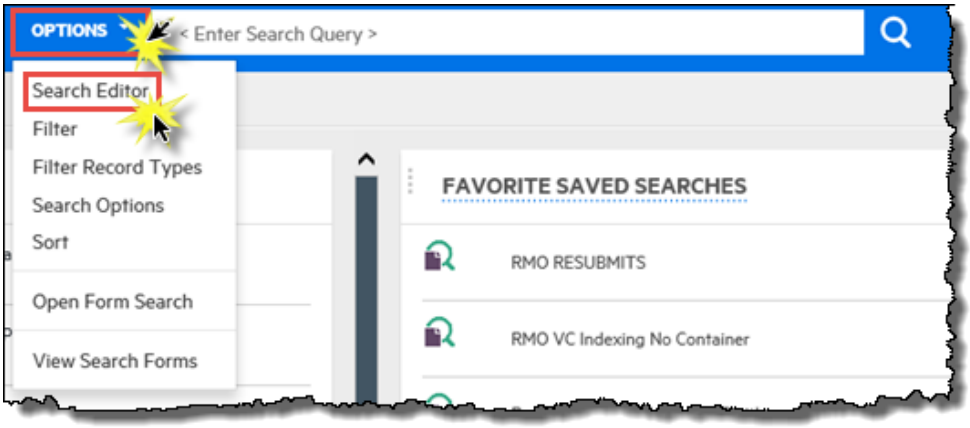
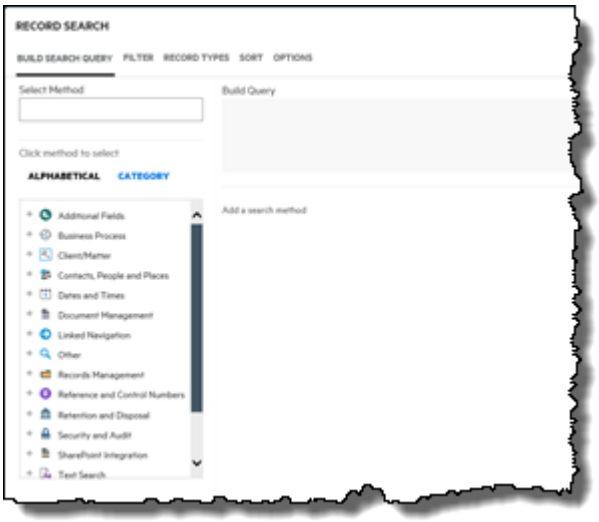
Step	TRIM Web Client – Searching – Search Forms
3.	In the Text option (which we will look at first) you have … · **Title Word** – search for specific words in document Titles · **Notes Word** – Search for Words in the Notes field · **Document Content** – Search for words within an actual document (NB: Some older PDF's do not allow this search) · **Any Word** - Search for a word in the Meta Data of a document (excludes document Content) 
	You can use multiple fields. For example you could search for a word in Document Content AND Title Word. 

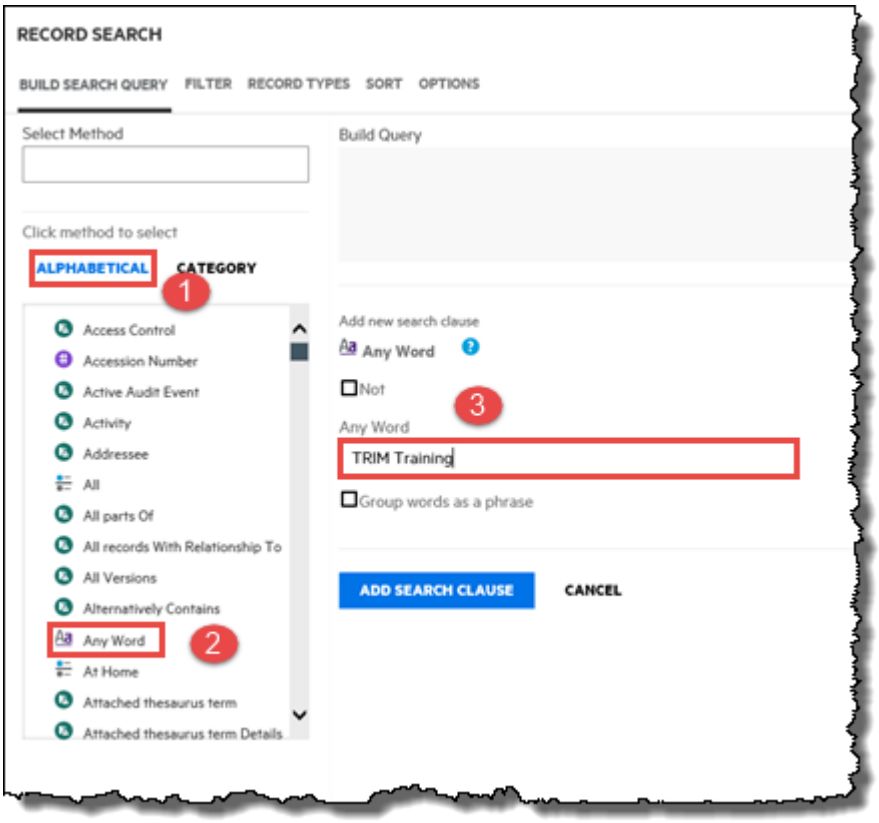
TRIM Web Client – Advanced Searching – Build a Search

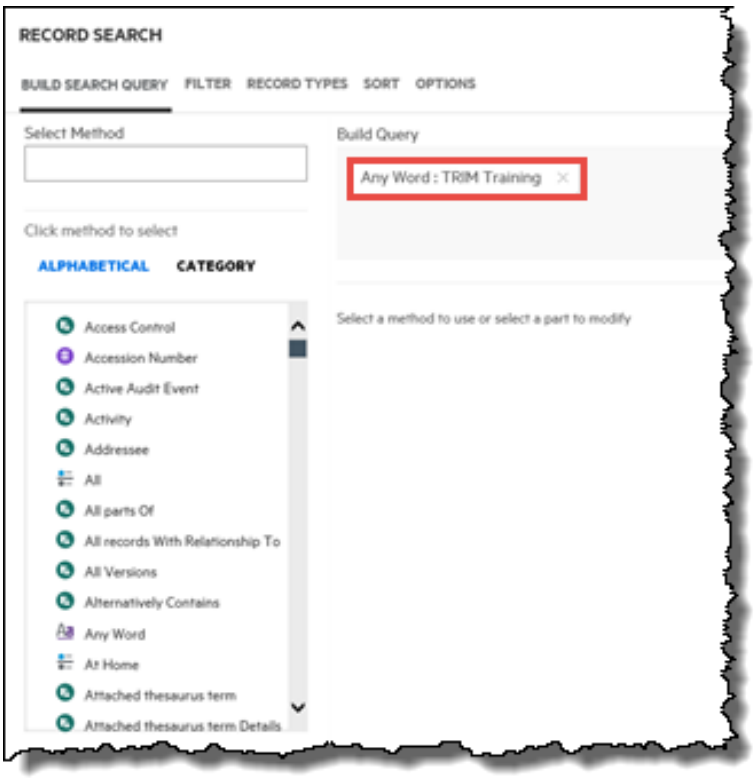
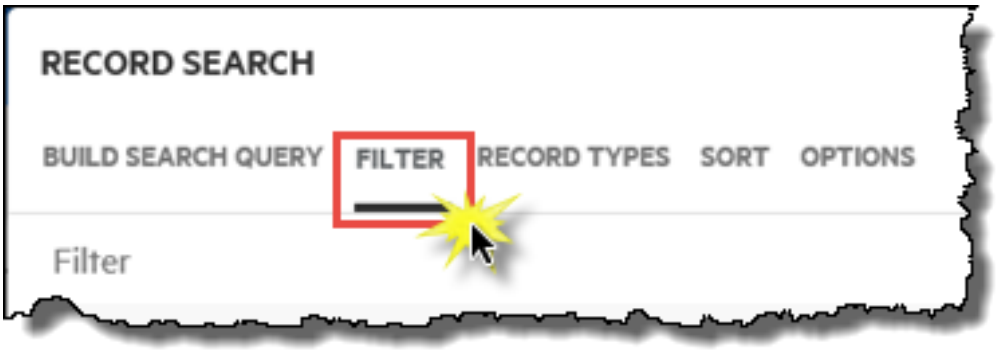
Not all searches can be done via Title Word and Record Number, so there are many other options available. For instance, '**Anyword**' is often used by more experienced users.

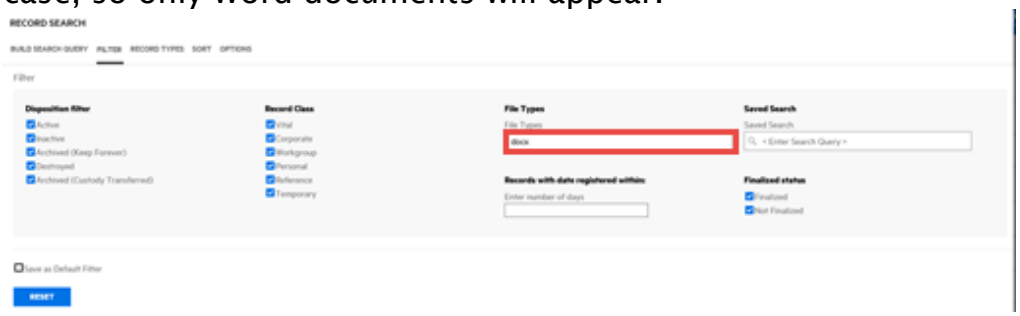
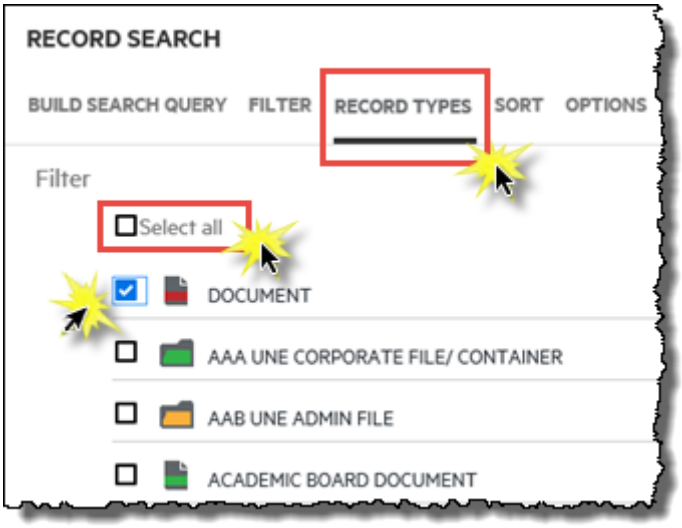
Anyword is used to search for words that may not appear in the title but could be elsewhere in the metadata of the record. The best example is the Notes field.

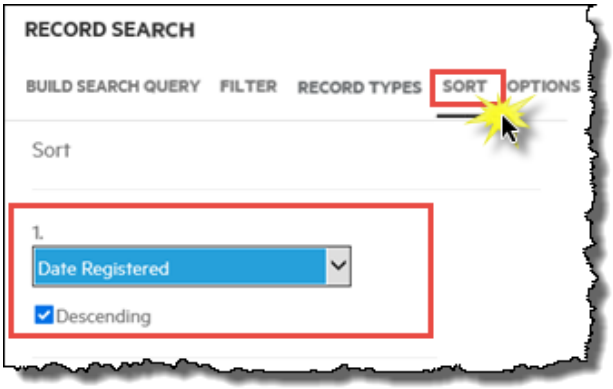
Anyword will search simultaneously in Title and Notes Fields.

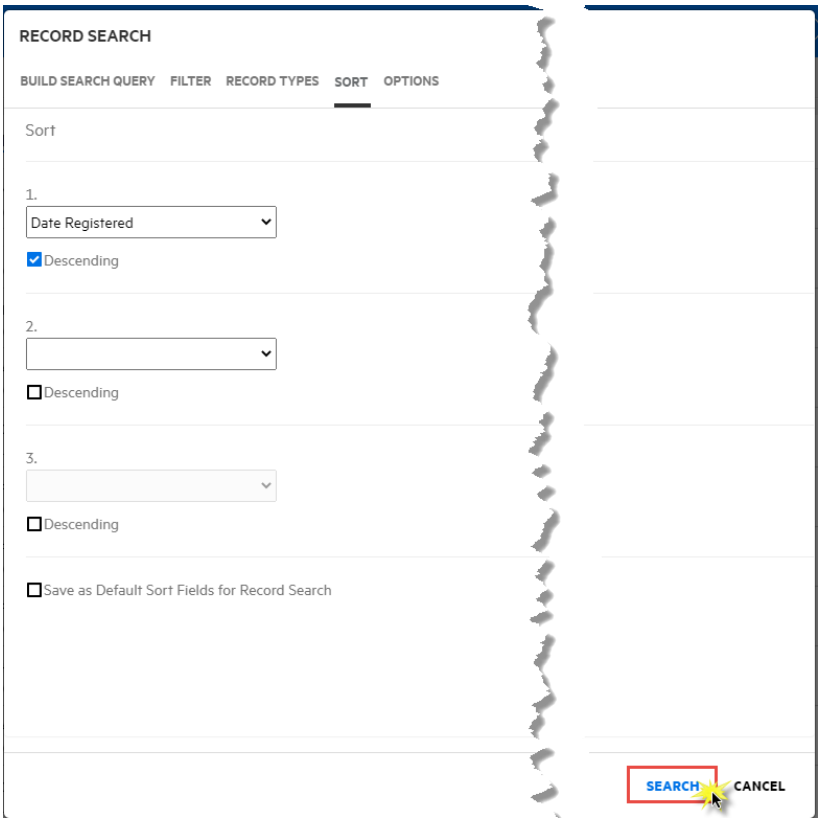
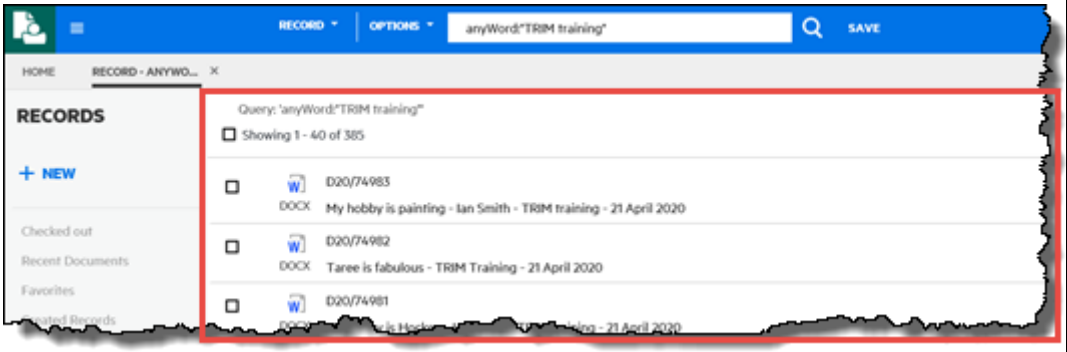
Step	TRIM Web Client – Advanced Searching – Build a Search
1.	Simply click on the OPTIONS dropdown
2.	Click on Search Editor 
3.	The Record Search Window will now allow you to 'Build' your search as required. 

Step	TRIM Web Client – Advanced Searching – Build a Search
4.	So now you can tell it what Method you want to use. 1. The Records Team finds it easiest to locate the required method when it is in Alphabetical order, so highlight that option by clicking on it (it will turn Blue) 2. We will use the Any Word option for this example. 3. We then type in the words we are looking for 
	You can choose to search for words individually, i.e. the search will look for these two words occurring anywhere within the search fields, they can be together the title or separately in title and notes. If you click on the ☐Group words as a phrase option the words will only be located where they are actually in that order together in the search fields. i.e. Using this option will find the Trim Train* if the Title is actually 'TRIM Training for fun and Profit' but not if the Title is 'Trainer unable to deliver for TRIM'

Step	TRIM Web Client – Advanced Searching – Build a Search
5.	Click on **ADD SEARCH CLAUSE** to build that requirement into your search. The Search Clause will appear… 
	You can make a Search as complex as you require. However if you need more search terms please contact Records and we will provide assistance in locating the records you are trying to retrieve.
6.	You can also add a filter, the most helpful maybe filtering on the type of Document (e.g. Word Document) – Simply click on the FILTER tab 

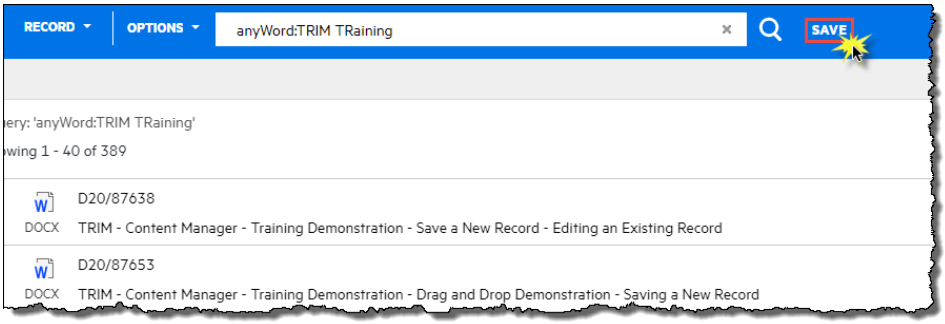
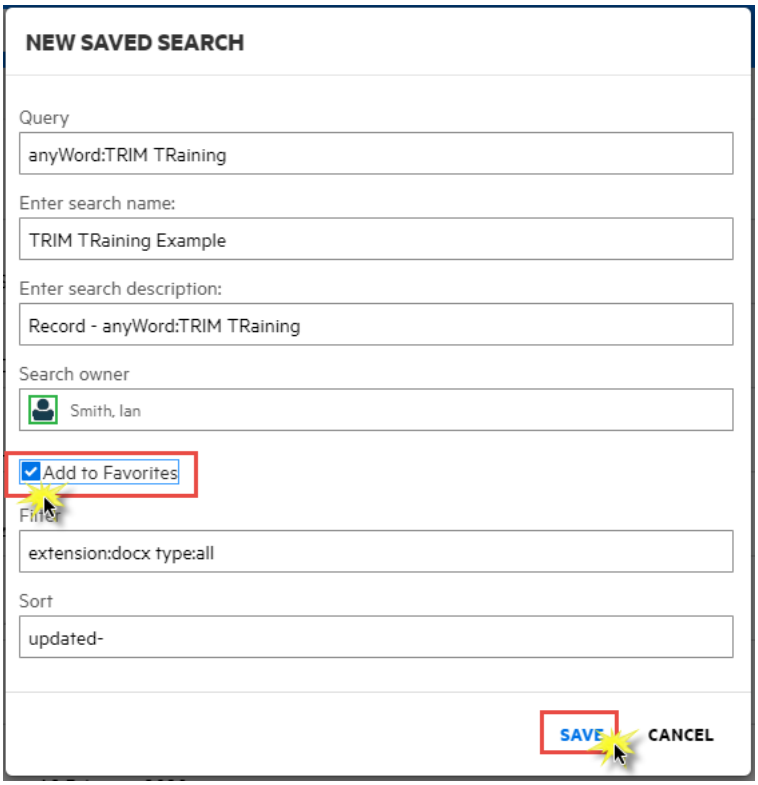
Step	TRIM Web Client – Advanced Searching – Build a Search
7.	The various filter will appear, in this example we only want to see MS Word documents. Simply type the file format, 'docx' in this case, so only Word documents will appear. 
8.	You can filter further by nominating what record type you want to search for in this example we are looking for a DOCUMENT
9.	Click on Record Types, click on Select all to 'Untag all' and then tag the record type you are looking for. 

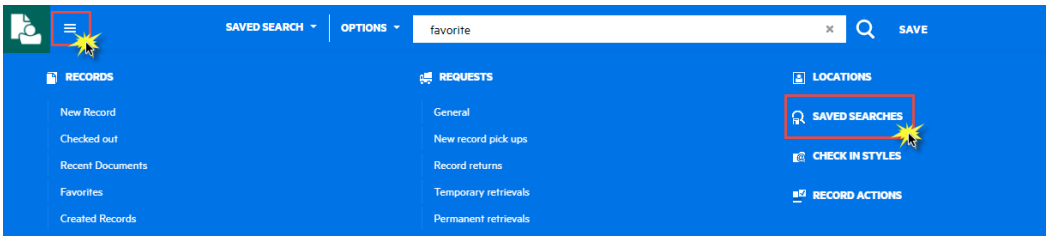
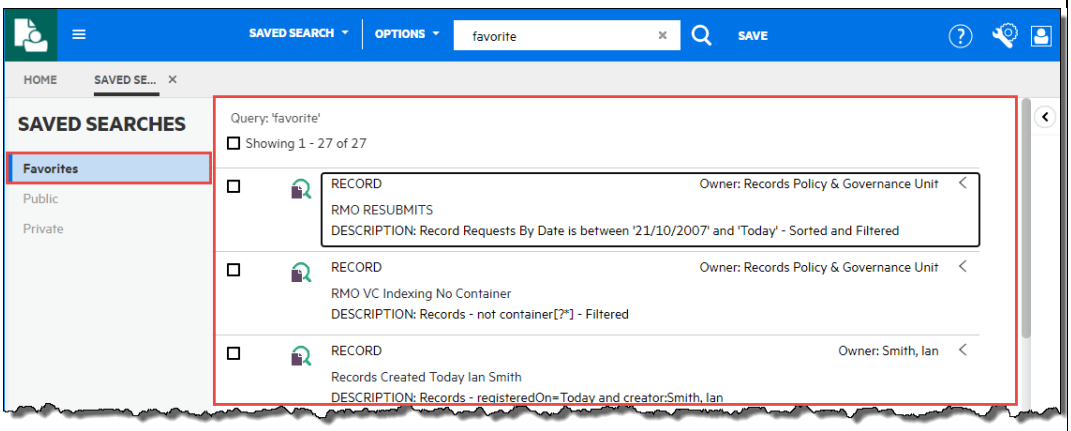
Step	TRIM Web Client – Advanced Searching – Build a Search
10.	Finally you can set a sort option. You could have all records appear in the order of the date last updated or alternatively the date they were Registered in TRIM. Simply click on SORT the sort options will appear. Click on the 1st Sort option field dropdown and select the preferred 
	Each Tab will have the option to set the options you have chosen as 'Default' ☐ Save as default filter for record search ☐ Save as Default Sort Fields for Record Search ☐ Save as Default Filter

Step	TRIM Web Client – Advanced Searching – Build a Search
11.	When you are ready click **SEARCH** 
12.	The results will appear in list format (40 to a page) and will give a count of the number of records located (nb if over 500 you will need to click the count link to get the number of records located) 

TRIM Web Client – Advanced Searching – Saving a Search

Sometimes you will have a search that you will want to keep coming back to. If this is the case, rather than rebuilding the search each time you can save it as a favourite.

Step	TRIM Web Client – Advanced Searching – Saving a Search
1.	Simply click on SAVE 
2.	The New Saved Search form will then appear. Simply give the Search a name and Tick the Add to Favorites field 

Step	TRIM Web Client – Advanced Searching – Saving a Search
3.	To locate your Favorite Searches simply click on ☰ and then SAVED SEARCHES 
4.	Your list of Favorite searches will then appear 

Module 4 - TRIM Web Client – Saving Records

There are multiple methods for saving a New record into TRIM.

These include;

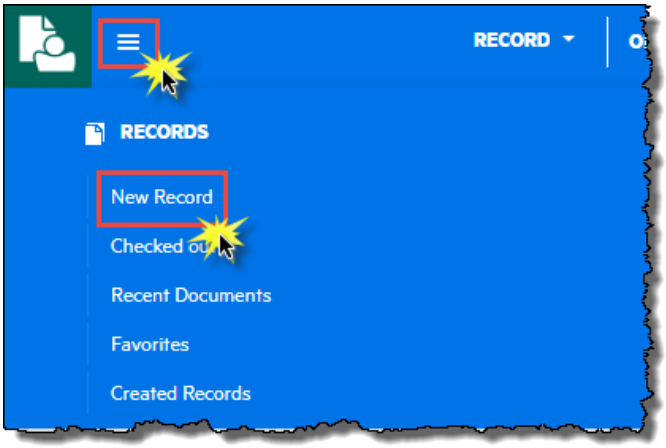
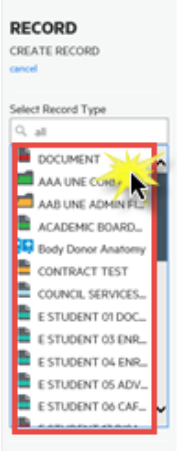
- the Content Manager Tab in integrated Microsoft products (like MS Word or MS Excel) to upload a new or existing document
- the Web Client Menu to locate and upload an existing document
- Dragging and dropping into TRIM (can be the Web client or the Desktop version of TRIM)

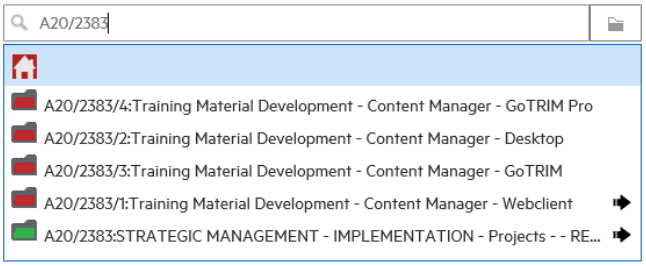
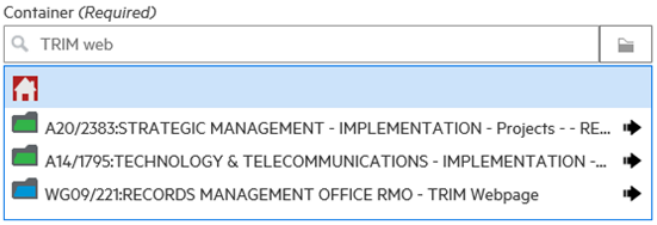
The recommended method is to use the Content Manager Tab in MS Word, MS Excel & MS PowerPoint. However, you will need to have Content Manager loaded on to your computer.

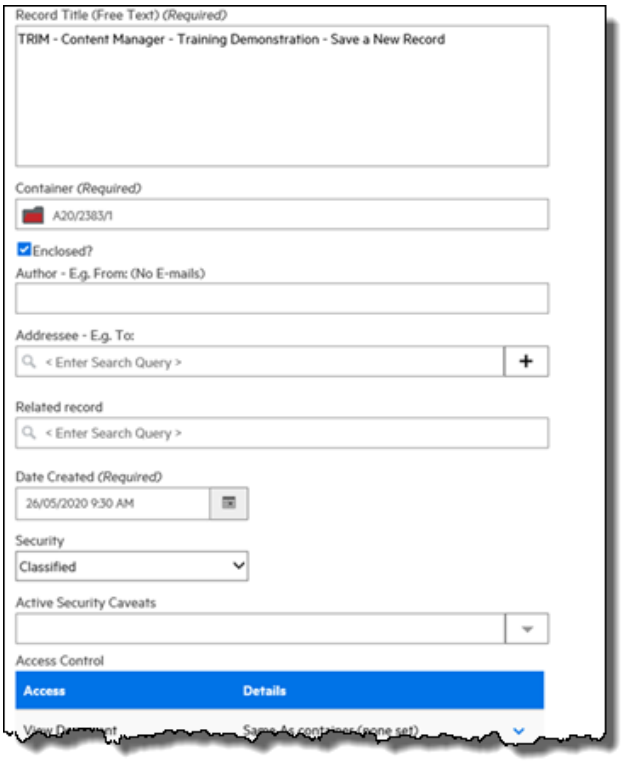
Click here to go to *TRIM Desktop Client - Module 4 – Lesson 1 – Saving Records* for this option.

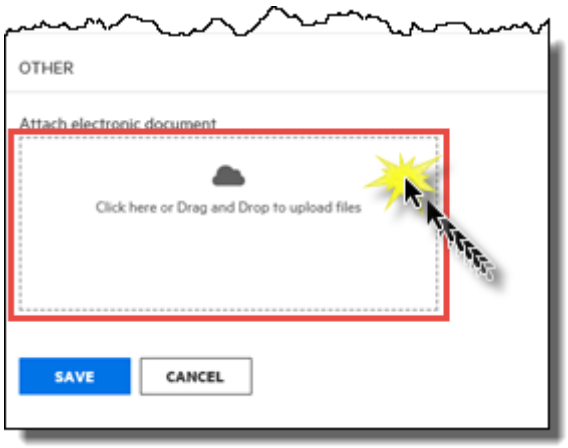
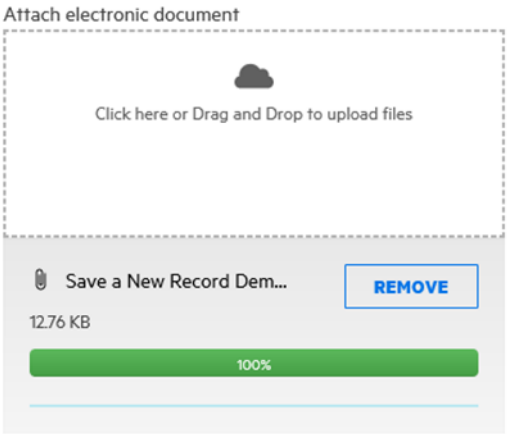
TRIM Web Client – Saving a New Record – Menu Option

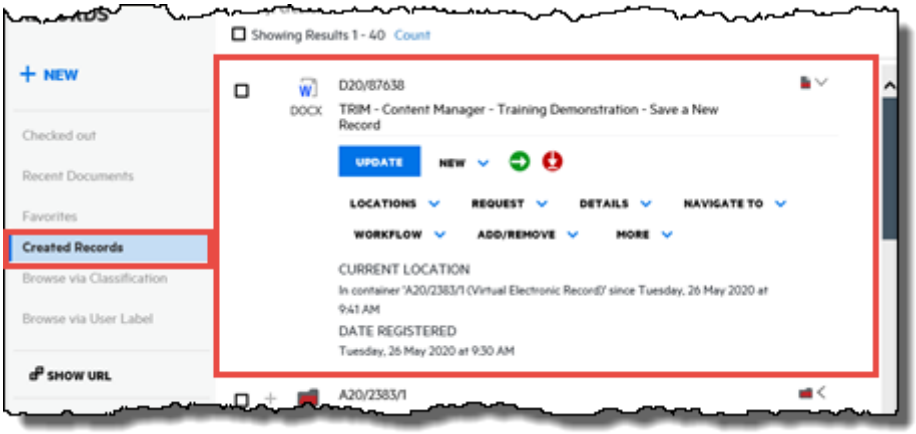
Have the document saved somewhere you can easily locate it and ensure you know the name or the Record Number of the Container you want to save the record to.

Step	TRIM Web Client – Saving a New Record – Menu Option
1.	Click on the Menu icon
2.	Select New Record 
3.	The Create Record Panel will appear. Select the required Record Type 
4.	The fields that apply to this Record Type will appear, complete the fields
	Naming a Record using the standard Naming convention is an important step in successfully saving a Record – there is little point saving the document if no one can find it later. Complete the Record Title using your teams agreed naming conventions (created in consultation with the Records Team and enter the Container Number.

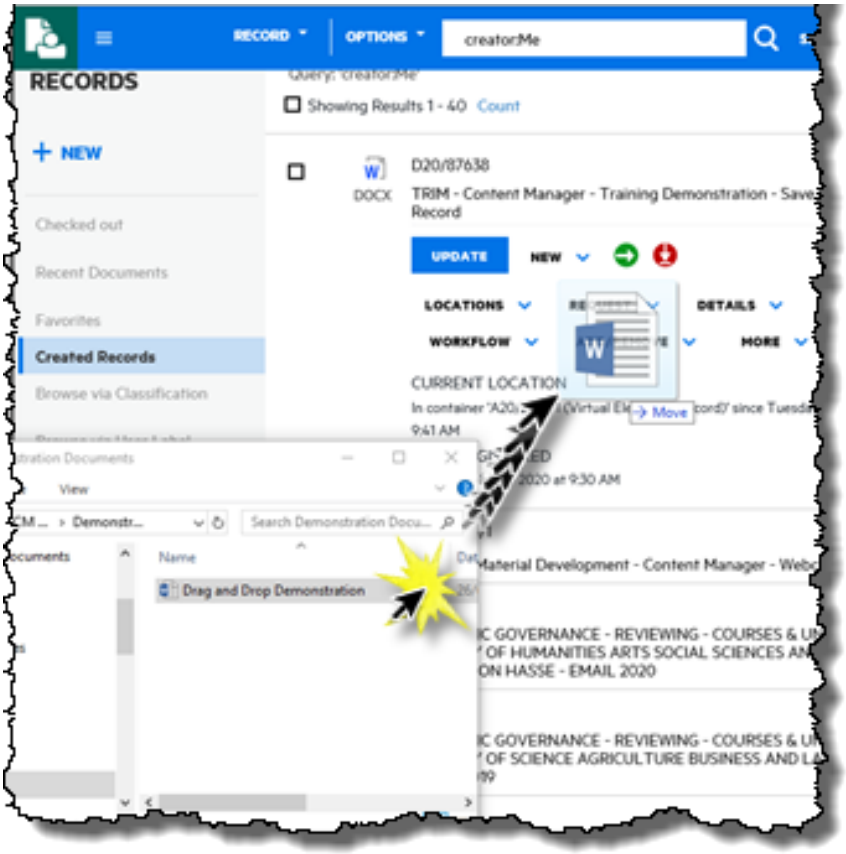
Step	TRIM Web Client – Saving a New Record – Menu Option
	If you know the Record Number of the container to be used simply Type in the Number in the Container Field. If there are sub folders it will display them as well. Simply click on the one you want  You can also type the key title words and any matches will appear  Finally, you can also click on the folder  to search
5.	The form may look a little like this…

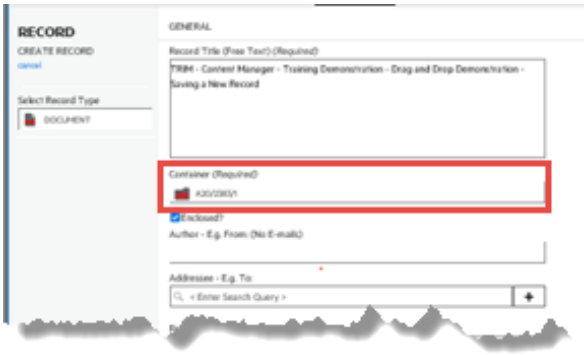
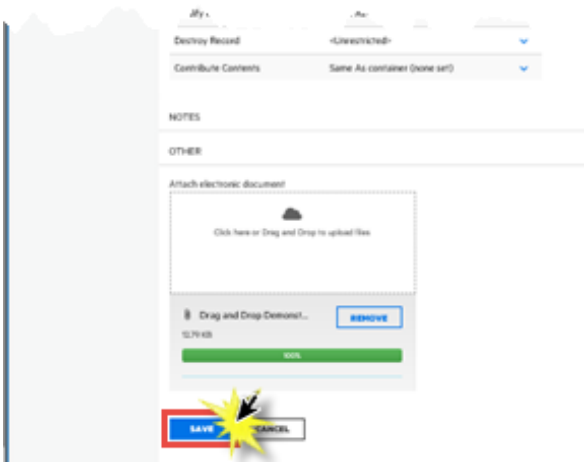
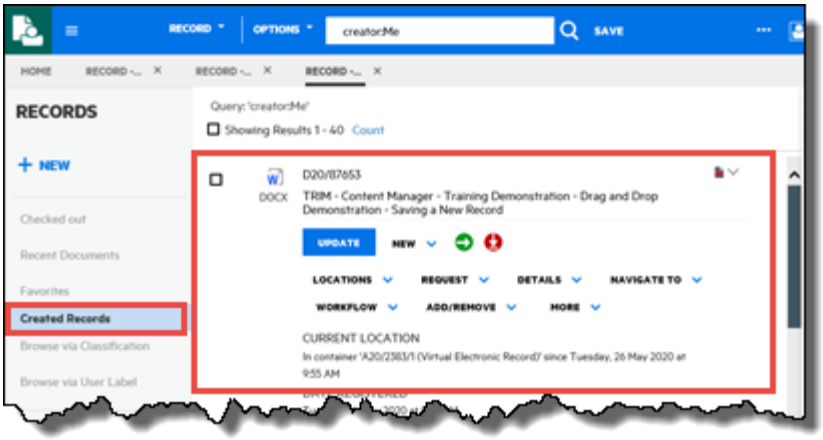


Step	TRIM Web Client – Saving a New Record – Menu Option
6.	Once the necessary fields are completed you can either… 1. Click on the 'Attach electronic document' panel and locate your document via windows explorer; or 2. Drag the document into the panel from its location 
7.	Once uploaded the panel will look like this… 
	You can change the document you are uploading before saving by clicking REMOVE and selecting another document
8.	Click SAVE

Step	TRIM Web Client – Saving a New Record – Menu Option
9.	The new Record will appear as part of your 'Created Records' List 
	 **Remember to remove the Document that you have just saved from where you downloaded from – this will help alleviate any confusion over which is the current version.**

You can Drag and Drop a document into the Web Client of TRIM, however you can't drop into a specific container. You will still need to complete the Container field as you save the document.

Step	TRIM Web Client – Saving a New Record – Drag & Drop
1.	Locate your document and drag and drop it into any area of the Web Client Window 

Step	TRIM Web Client – Saving a New Record – Drag & Drop
2.	Follow the same process… 1. Select the Document Type 2. Assign the Container 3. The Document is already loaded 4. Click SAVE  
3.	The document will appear in the Created Records List 

Module 5 - TRIM Web Client – Managing Records

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.

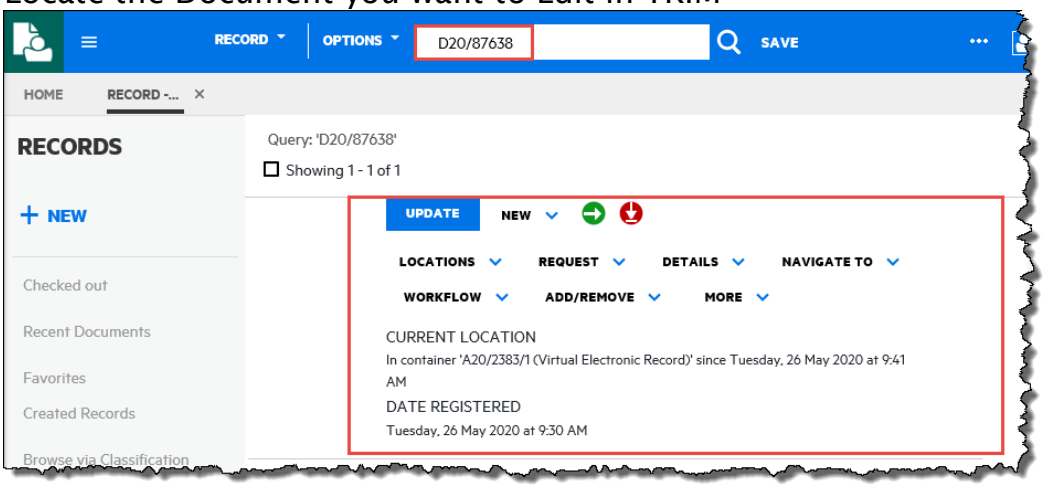
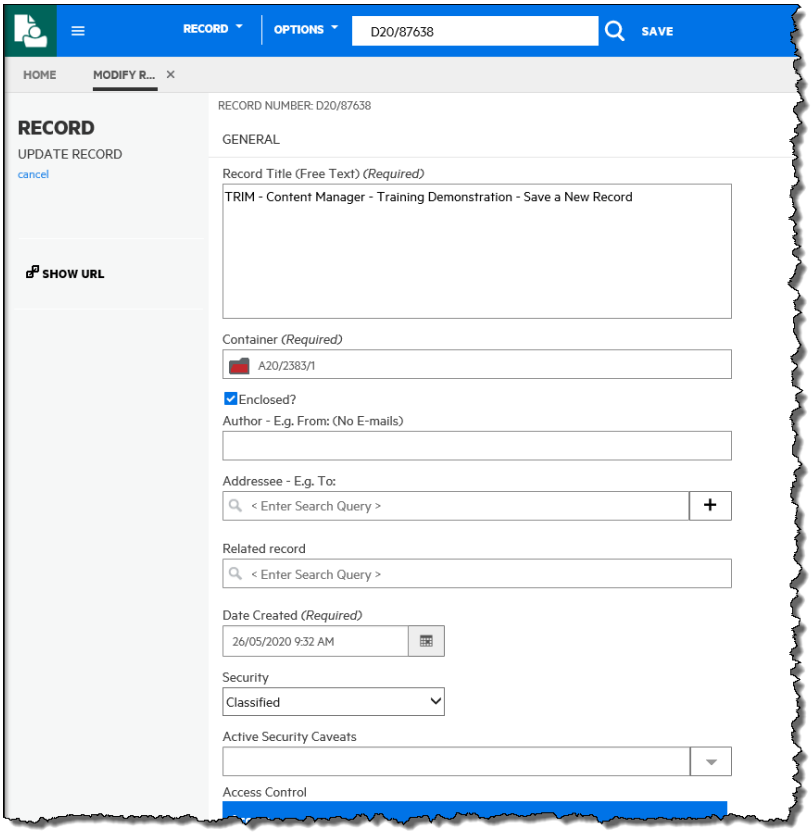
In this lesson we will look at…

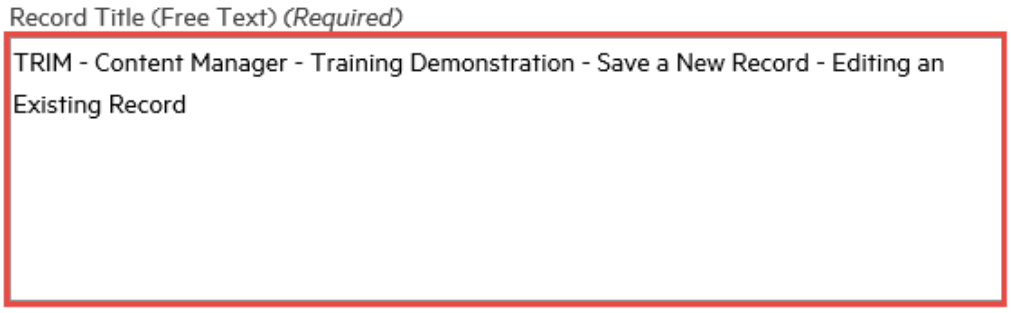
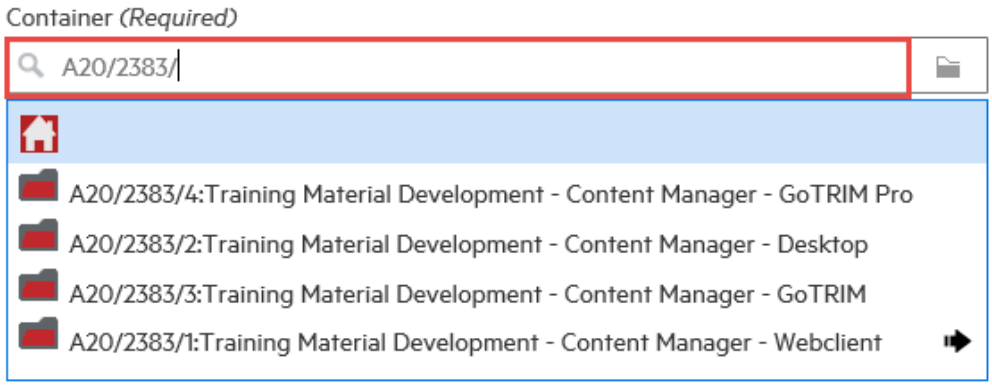
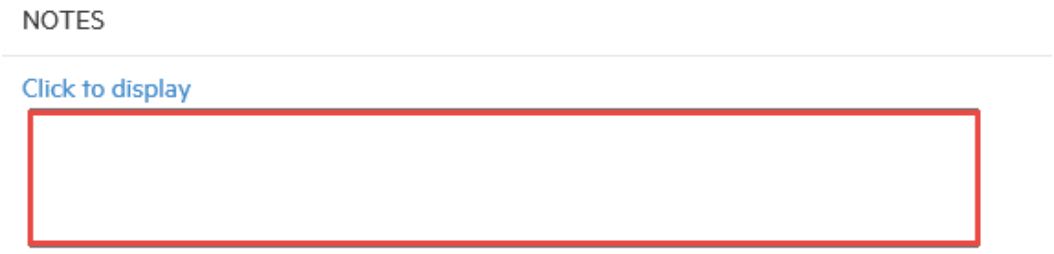
- Change of Title
- Change of Container (moving from one container to another)
- Viewing/Adding Notes
- Viewing Meta Data
- Labels

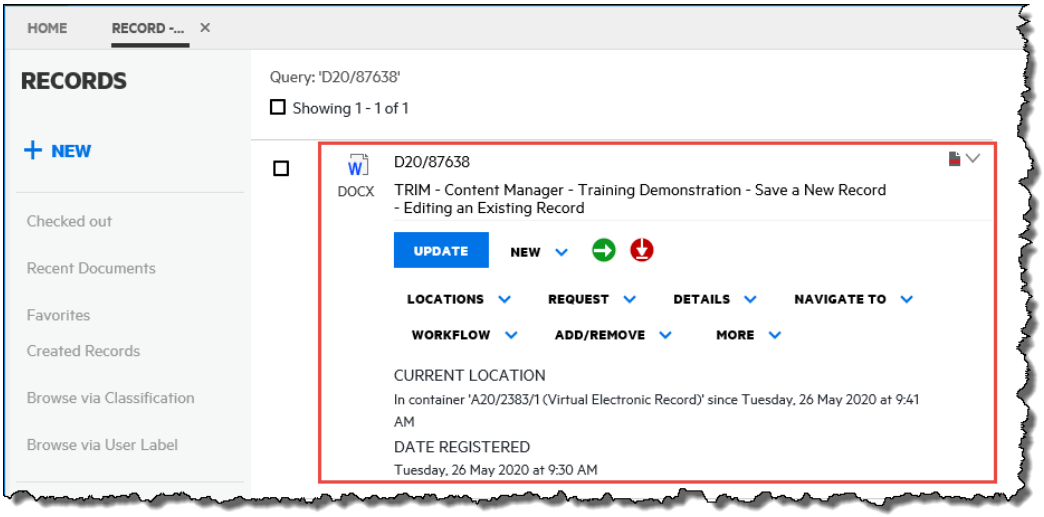
It's important to remember that your permissions in TRIM will determine what you will have access to change/update. If you do have trouble making changes contact the Records Team for assistance

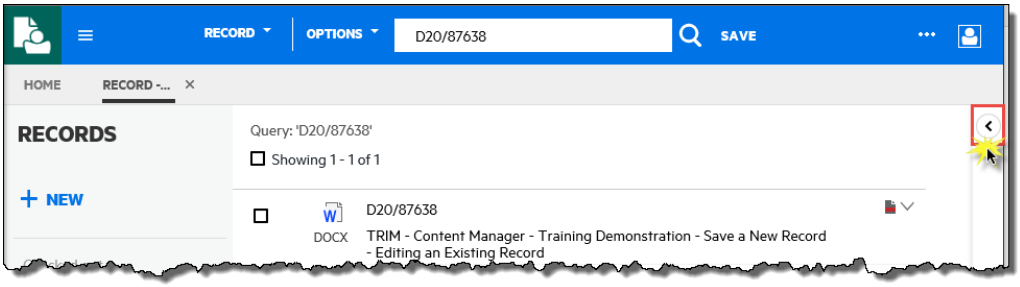
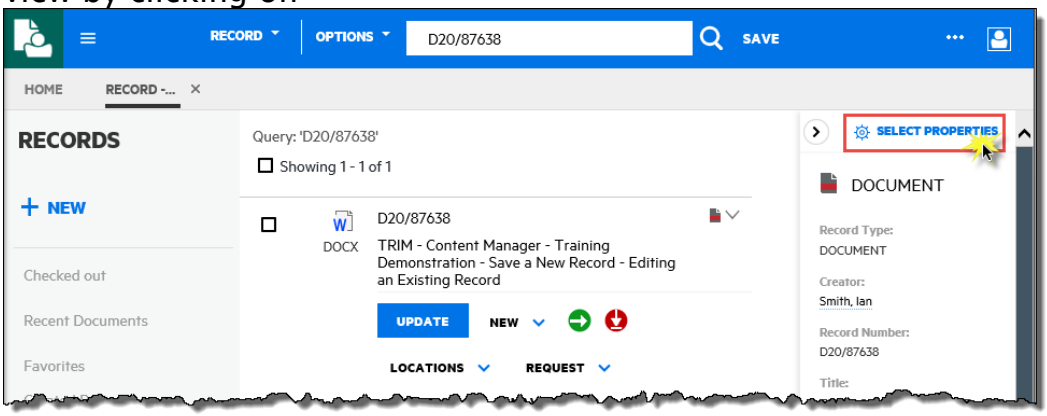
TRIM Web Client – Managing Records – Change of Title, Location and Adding Notes

Sometimes we save Records into TRIM and then have to update the title for a variety of possible reasons. This can be easily done in the TRIM Web Client.

Step	TRIM Web Client – Saving a New Record – Menu Option
1.	Locate the Document you want to Edit in TRIM 
2.	You can click on the **UPDATE** button and the Meta Data for the record will appear. 

Step	TRIM Web Client – Saving a New Record – Menu Option
3.	Simply make the change in the Title Field 
4.	You can also change the Location (Container) of the record from here… 
5.	There is also the ability to add Notes, 
6.	Simply make the changes and click **SAVE**

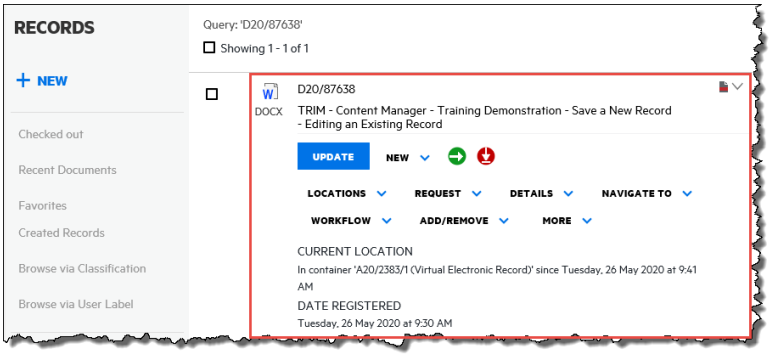
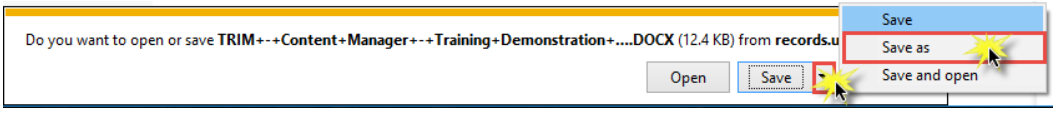
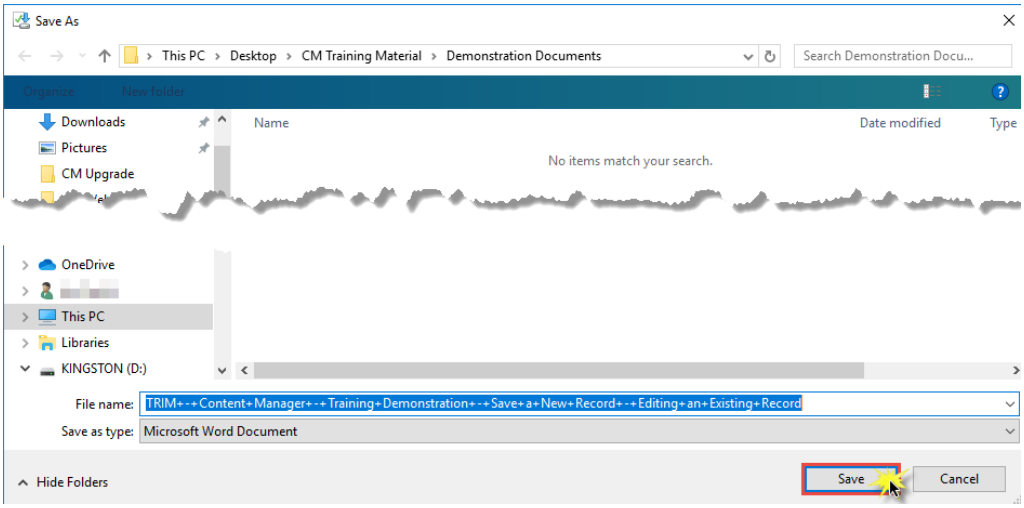
Step	TRIM Web Client – Saving a New Record – Menu Option
7.	The changes will appear in the main screen 

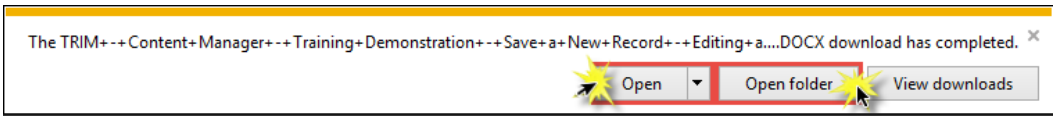
Step	TRIM Web Client – Saving a New Record – Viewing the Meta Data
1.	You can view all the Meta Data in the Properties Panel, simply click on the 
2.	The properties Panel will appear, you can add Properties to the view by clicking on SELECT PROPERTIES 
	Generally, you will not need more than is already viewable by default. However, talk to Records staff if there is information you would like to be available.

TRIM Web Client – Managing Records – Editing a Record (Revision)

A revision is what most of us might refer to as a 'Version' outside of TRIM.

TRIM is very good at keeping a list of the different 'Versions' or Revisions of a record in TRIM. Where used in the appropriate way you will always be able to track the change of a document during its lifecycle.

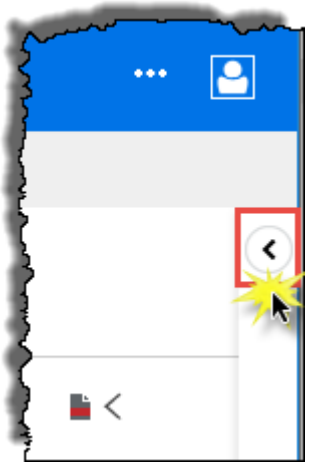
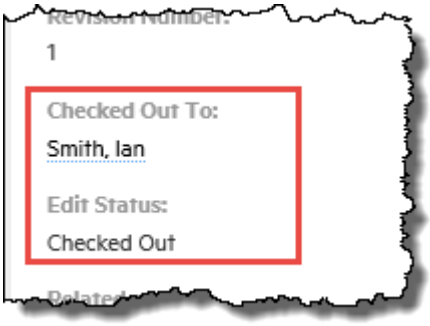
Step	TRIM Web Client – Managing Records – Checking out a document for editing (Revision)
1.	Locate the Record you want to Update or Edit 
2.	Click on  and you will be asked if you want to Open or Save the document. 
3.	Click on the dropdown for Save and select Save as 
4.	Save to your preferred location. 

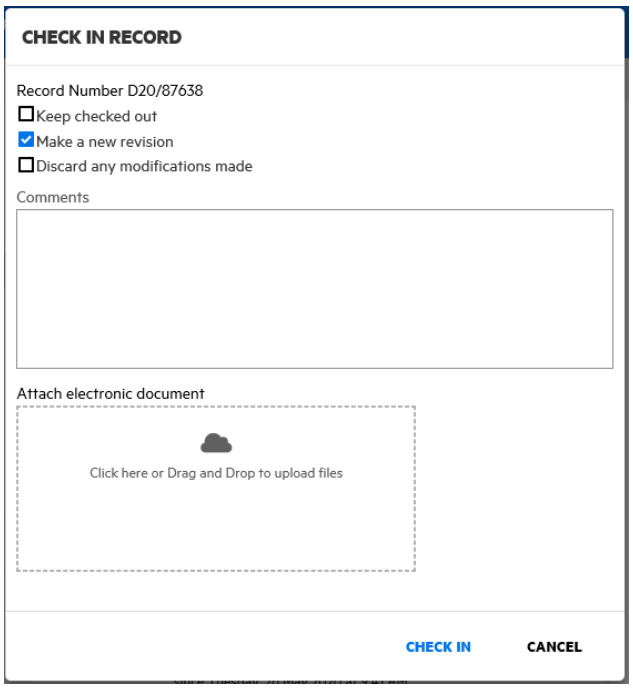
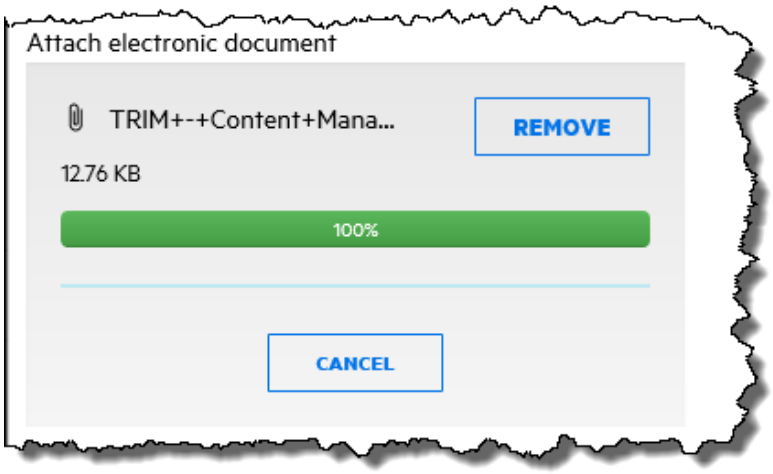
Step	TRIM Web Client – Managing Records – Checking out a document for editing (Revision)
	It's a great idea to have a folder on your Desktop, Share drive, UNE Teams or UNE OneDrive where you temporarily place records while editing. That way you will always know where your documents are located while you are editing.
	 **Never use unsecure locations, like Dropbox, to store UNE records (even temporarily).**
5.	You can then open the Document (or the folder where it is saved). 
6.	You can then edit the document as needed and save in its temporary location until you are ready to check it back in to TRIM

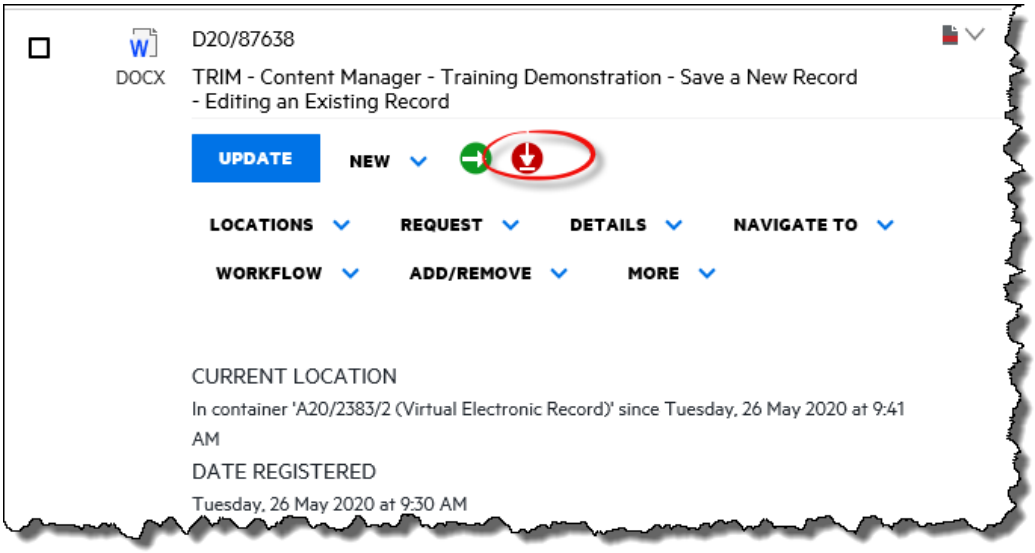
Step	TRIM Web Client – Managing Records – Checking out a document for editing (Revision)
	 It is highly recommended that documents are checked back into TRIM regularly. Whilst the revision (version) in TRIM is viewable while you are working on the checked-out copy, no one else can save new versions. In addition, if you leave a document checked out and you have to suddenly have to go on leave it maybe you will lose your changes if Records are asked to check the document back in so another user can edit the document.

TRIM Web Client – Managing Records – Checking a document back into TRIM (Revision)

Once you have updated a checked-out document OR have made changes to Read Only copy of the document you can then easily Check in the new revision.

Step	TRIM Web Client – Managing Records – Checking a document back into TRIM (Revision)
1.	Locate (in TRIM) the Record you want to Update or Edit
	You can only Check in where the Document is not Checked out to someone else – so if you have it Checked out you can check it back in or if it is not currently checked out at all To see if a Record is Checked out already simply look for , **if it doesn't appear then it is checked in.**  If it is Checked out go the Properties panel and click on the , you may have to scroll down but there is a field 

Step	TRIM Web Client – Managing Records – Checking a document back into TRIM (Revision)
2.	To Check in simply click on , the Check in Record window will appear. 
3.	It will Default to Make a new revision but you can select … Keep checked out to update TRIM with your latest changes and keep the document Checked out so you can continue to make edits; or Discard any modifications made which will simply remove the Checked-Out status but you will lose any changes
4.	Simply upload the new Revision by Drag and Drop or click to locate the document where you stored it 

Step	TRIM Web Client – Managing Records – Checking a document back into TRIM (Revision)
5.	Click **CHECK IN**
6.	You will see that the Document is checked in by the appearing 
	You can see previous Revisions by clicking on DOCX  Then click on **REVISIONS** 

Step	TRIM Web Client – Managing Records – Checking a document back into TRIM (Revision)
	 **It's best to delete the document from its location (Desktop, Share Drive etc.) after it has been successfully uploaded to TRIM.**

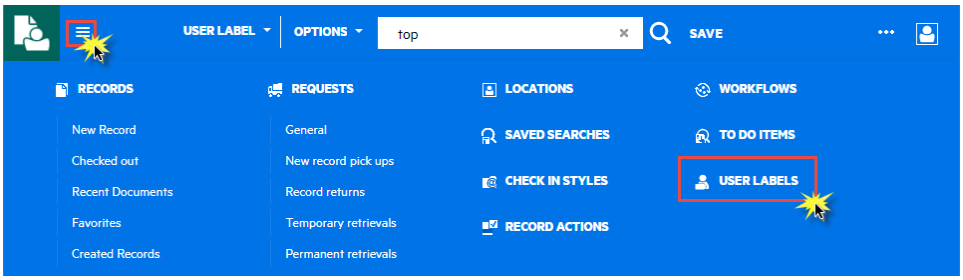
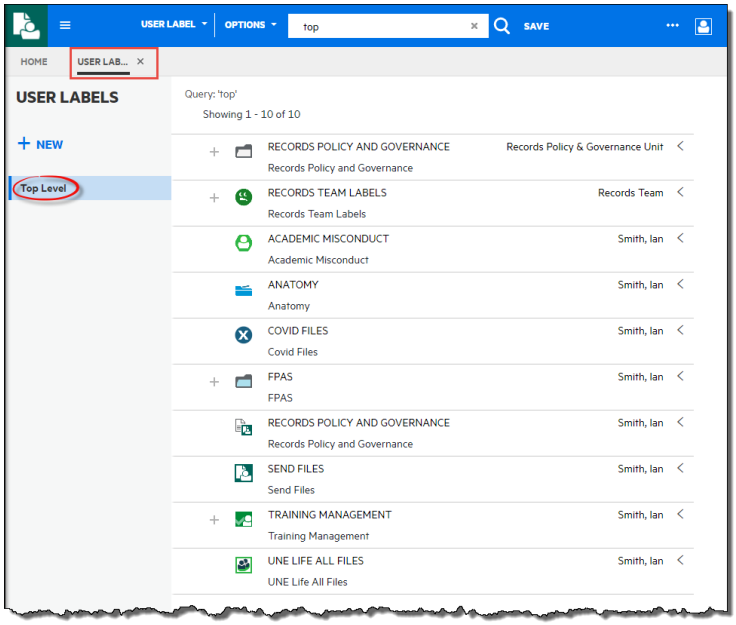
User Labels

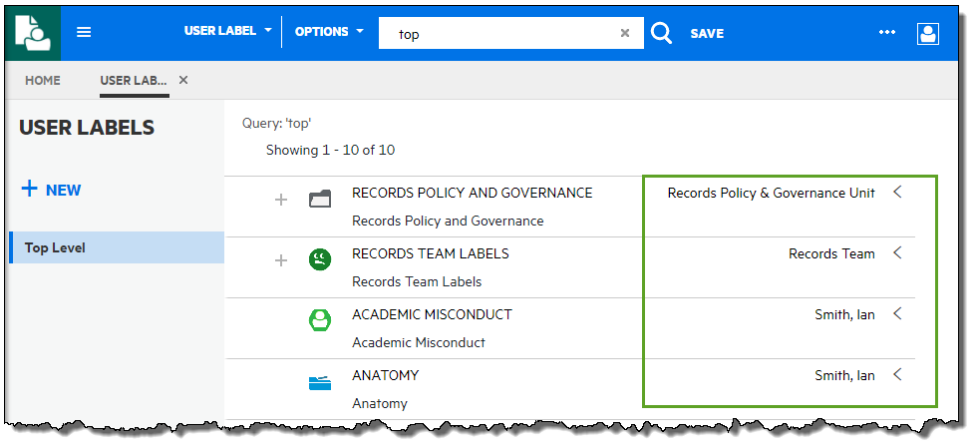
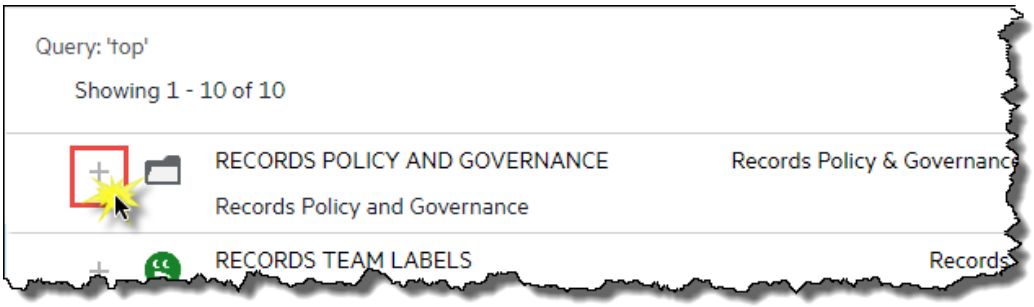
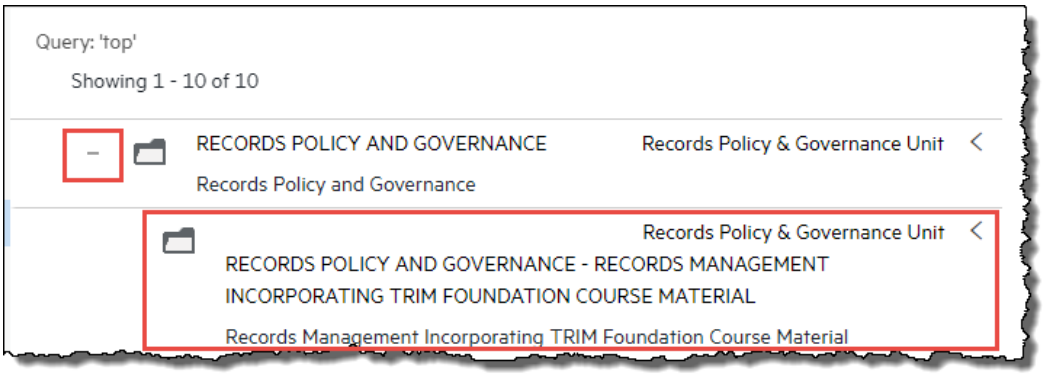
One of the most common pieces of feedback that the Records Team receives regarding TRIM is that it's very different to the Share Drive (Barney) or One Drive and some users struggle with these differences.

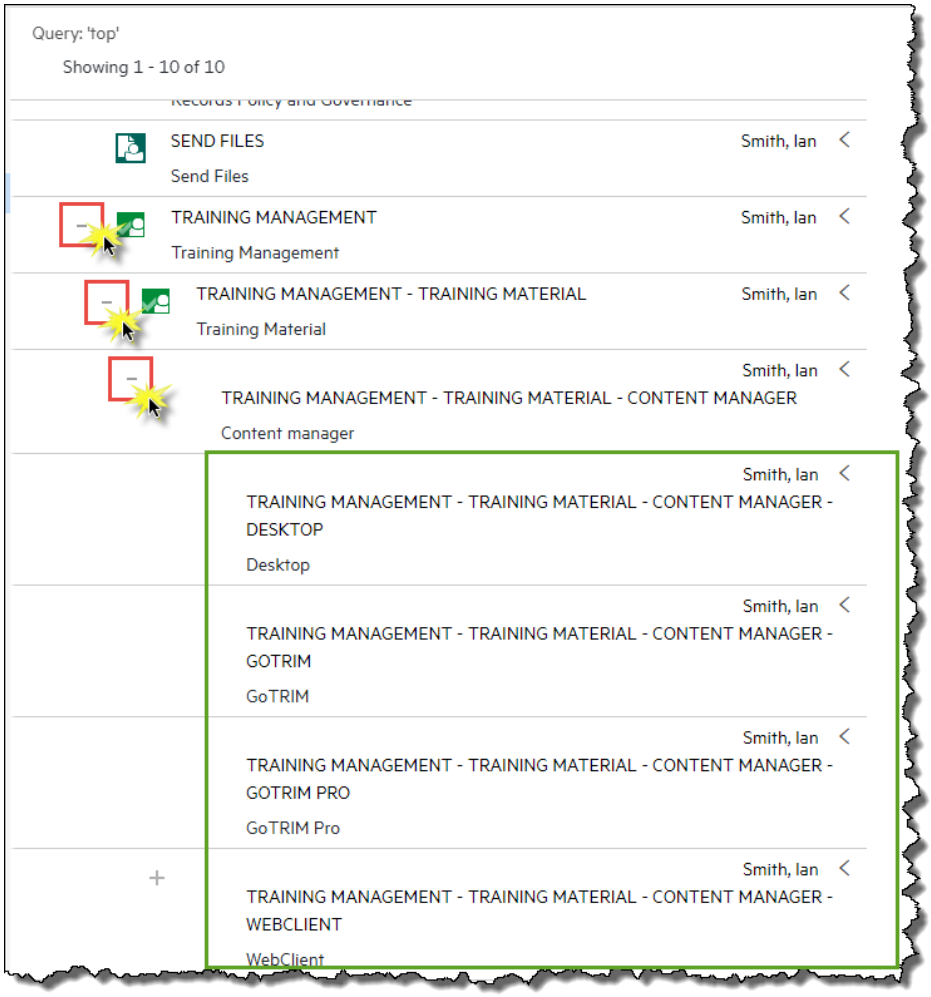
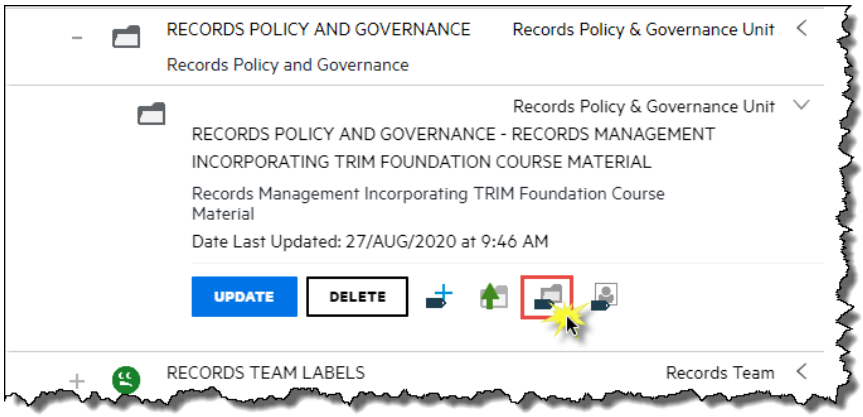
TRIM's file structure is flat and focusses entirely on the subject or content of the Record and users can see a maximum of 2 Levels of Containers. Whereas other systems use multiple layers of folders that usually follow location (i.e. what team 'owns' the data).

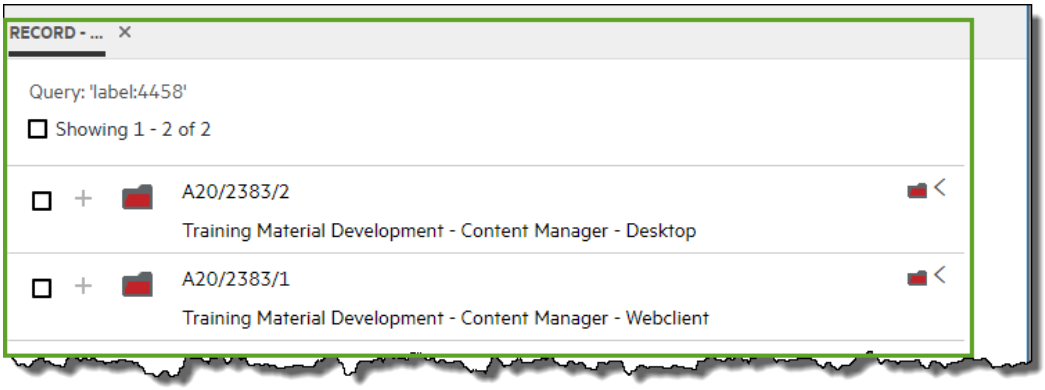
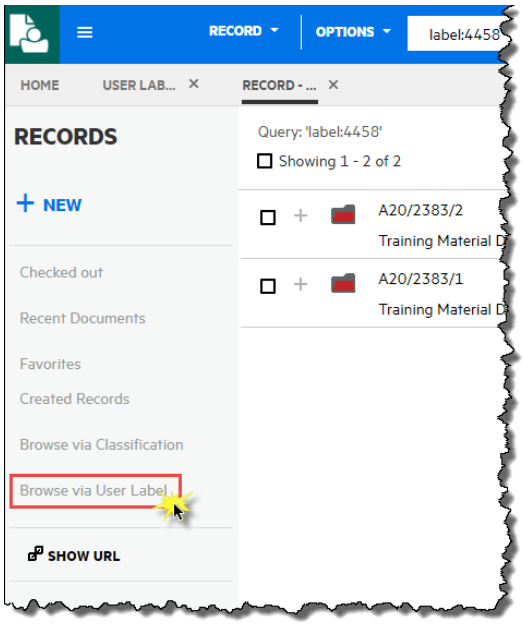
TRIM now offers User Labels which allows Users to tag Records and/or Containers so that they can easily track 'their' items.

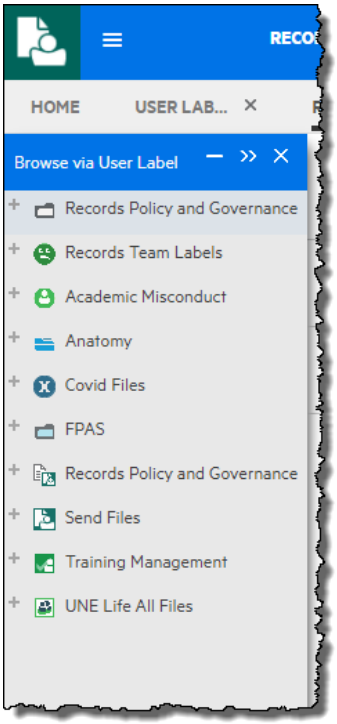
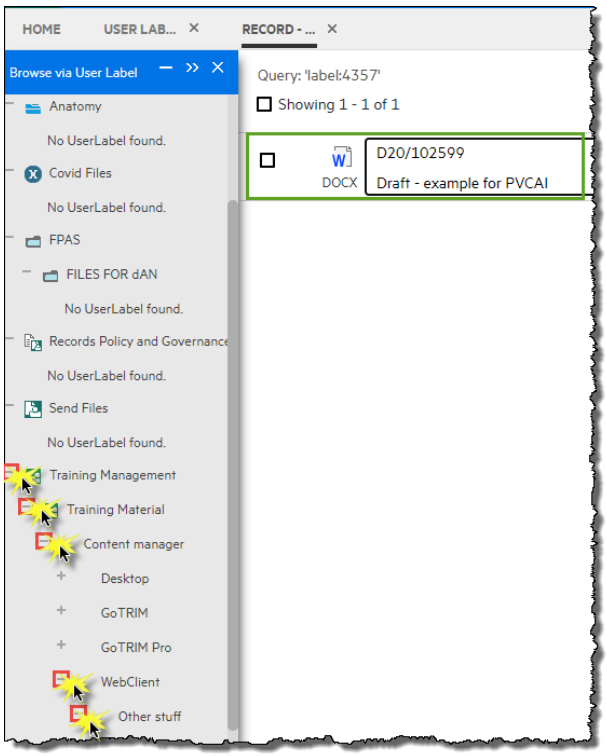
TRIM Web Client – Managing Records – User Labels – View

Step	TRIM Web Client – Managing Records – User Labels - View
1.	Click on  and then  
2.	The User Labels Tab will appear, the list of your existing Labels (Top Level only) will appear. 

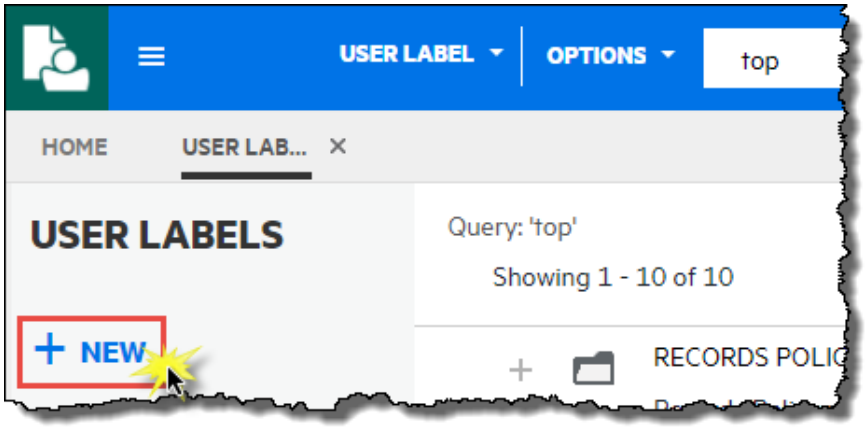
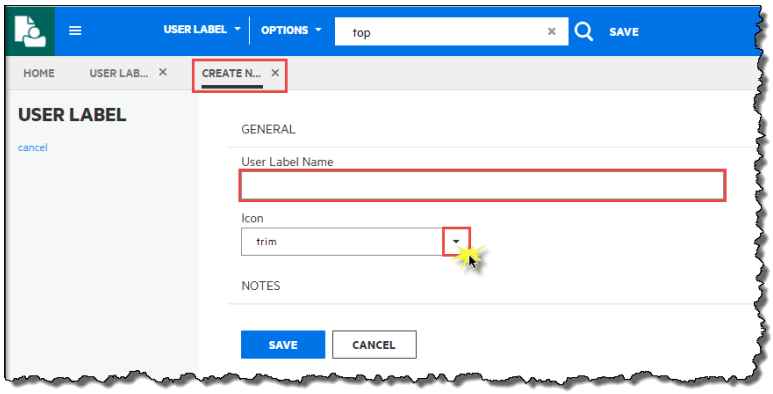
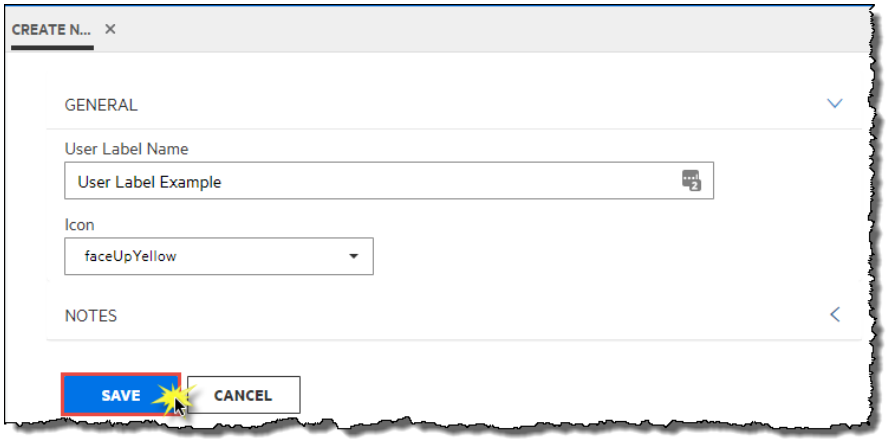
Step	TRIM Web Client – Managing Records – User Labels - View
	When a Label is created it will default to be owned by you. This means it you aren't able to share the Labels with others. However, Labels can be set up for different TRIM security Groups and therefore be shared amongst the members of those groups. In the example below Ian Smith has his own Labels and Labels he shares with 2 TRIM Security Groups. 
3.	To view the next level of User Labels, click on the + 
4.	The next Level will appear 

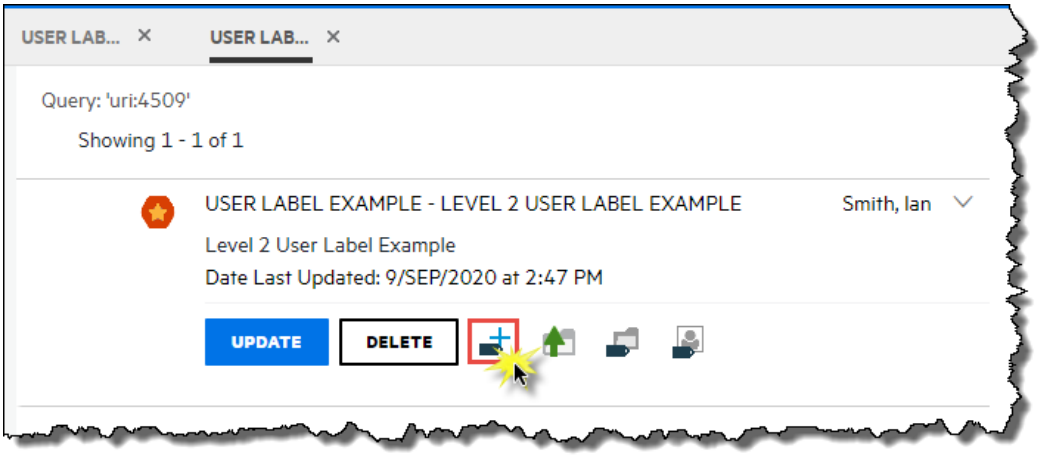
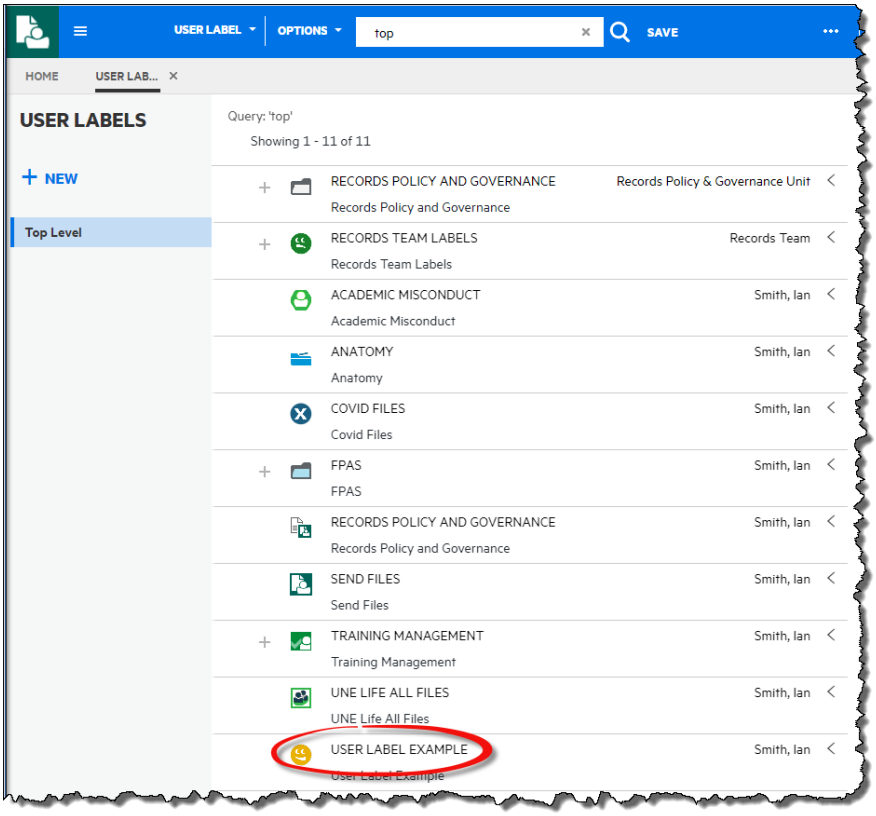
Step	TRIM Web Client – Managing Records – User Labels - View
5.	You can have multiple levels of Labels (so they can look like your share drive if that's what you want) 
6.	To see the records that have been associated with those labels click on the Label and then click on  

Step	TRIM Web Client – Managing Records – User Labels - View
7.	A new tab will appear and will display the Records or containers within the Label. 
8.	Within the Search Tab for the Records within the specific Label you just opened some new options become available. You can click on Browse via User Label. 

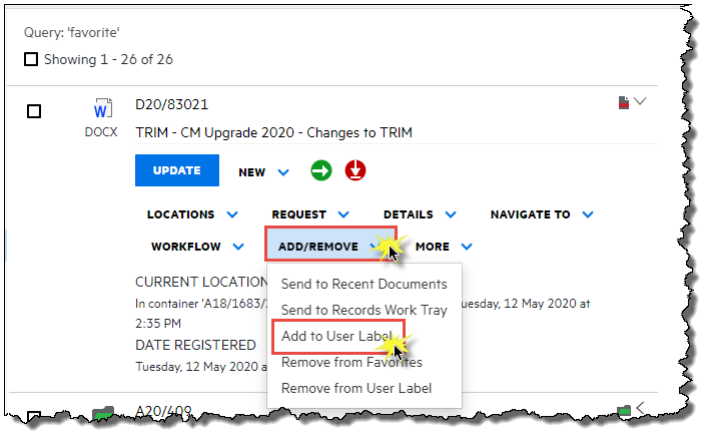
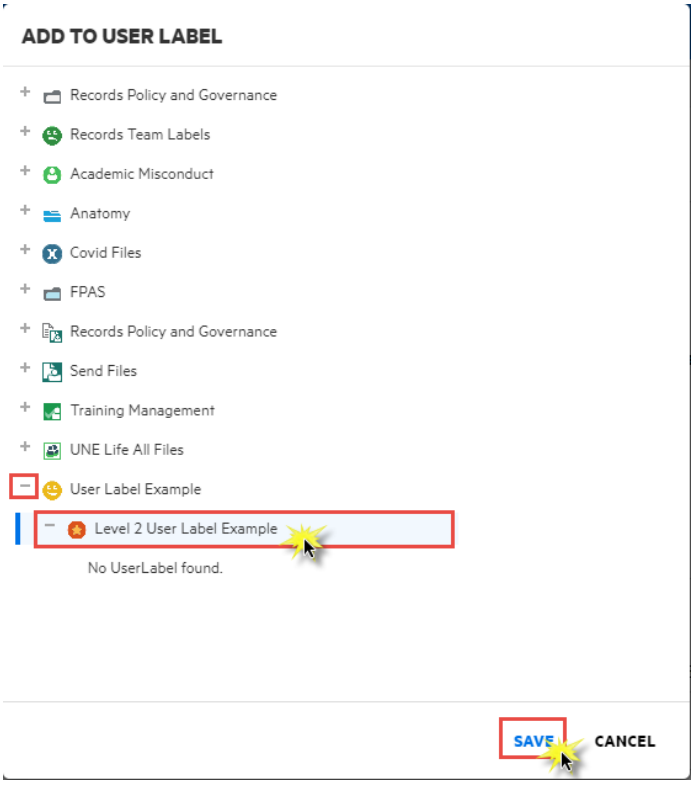
Step	TRIM Web Client – Managing Records – User Labels - View
9.	The list of User Labels will then appear 
10.	Again, you can navigate down to the Label you need to view 

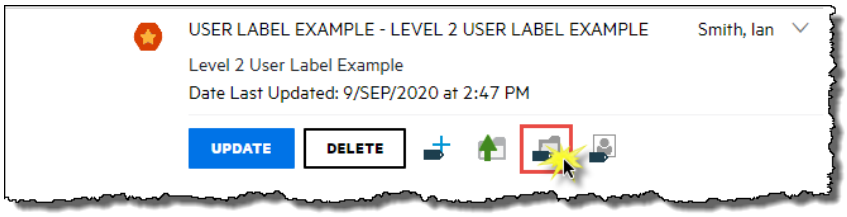
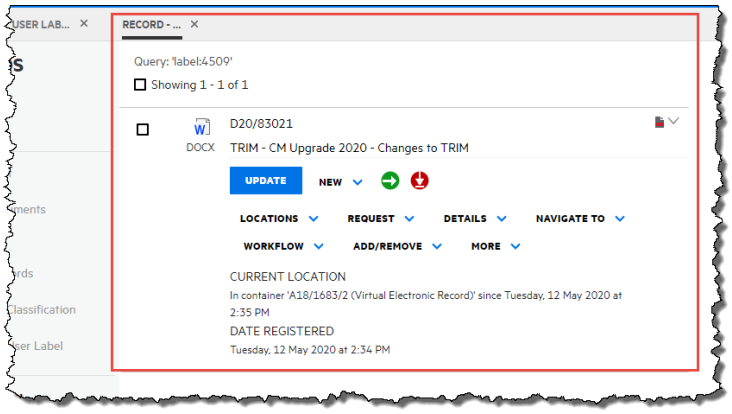
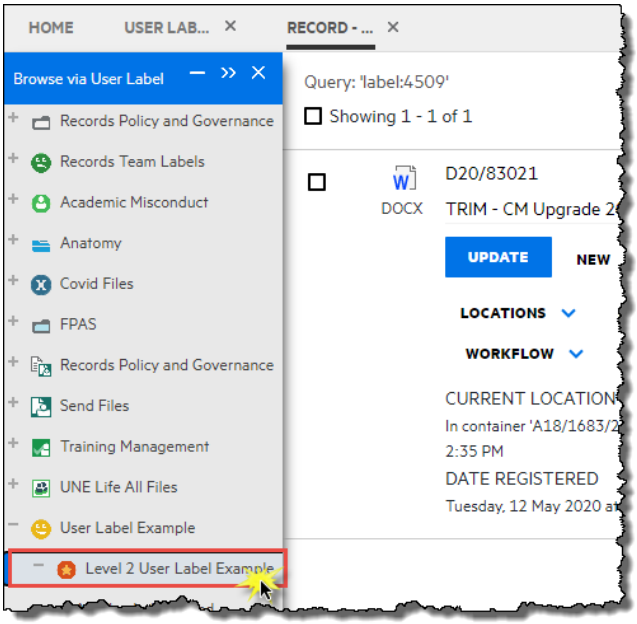
TRIM Web Client – Managing Records – User Labels – Create a new Label

Step	TRIM Web Client – Managing Records – User Labels – Create a new Label
1.	To create User Label simply return to the User Labels Tab and click on + NEW 
2.	The Create New User Label Tab will open 
3.	Enter the name and select an Icon  Click SAVE

Step	TRIM Web Client – Managing Records – User Labels – Create a new Label
4.	The Label has now been created, to create a subsequent level simply click on  The Create New Label Tab will appear, repeat the process 
5.	The New Labels now appear in the User Labels Tab 

TRIM Web Client – Managing Records – User Labels – Assign a Label

Step	TRIM Web Client – Managing Records – User Labels – Assign a Label
1.	To assign a Record to a Label simply locate the Record and click on **ADD/REMOVE**
2.	Then select Add to User Label 
3.	The Add to User Label window will appear, select the User Label you want to assign to the record  Click **SAVE**

Step	TRIM Web Client – Managing Records – User Labels – Assign a Label
4.	The Record has now been added to the Label. To locate the records attached to a Label click  
5.	The list will appear in a new Tab 
6.	You can also use the Browse via User Label option, simply click on Browse via User Label and navigate to the label  The Records (in this case just one) will then appear in the Tab