



RECORDS GOVERNANCE – TRAINING

TRIM9 TRAINING

WHAT IS TRIM9?

TRIM9 is the University's electronic document and records management system (EDRMS) used to support the compliant life-cycle management and security of records and information (from creation to disposal) which are captured as part of our day to day work at the University.

TRIM9 TRAINING

TRIM9 training provided by Records Governance Services (RGS) is tailored to suit a particular individual, team or a particular task. Tailored training ensures you receive the most effective and relevant training and in a timely manner. Training covers introductory or refresher training where you will learn the basics of TRIM9 through to advanced training where you will discover how to maximize benefits from some of the advanced TRIM9 functions (e.g. workflows).

WHO SHOULD ATTEND

Training is suitable for individuals and business areas that are planning to incorporate TRIM9 into their business practices or are currently utilising TRIM9 and need refresher training or who require a record and information management solution for their business area.

TRAINING TOPICS

- Introduction to TRIM9 / TRIM 9Web Client
- Customisation of TRIM9 Interface
- Basic, Advanced and Saved Searching
- Navigation and Sorting Search Results
- Creating Records – folders and cabinets
- Creating Outlook-TRIM9 folder links
- Naming Conventions / Titling Guidance
- Using the TRIM9 Folder Wizard
- Record Types and How to use a Specific Record Type
- TRIM9 Integration with Outlook
- Security and Access Controls
- Editing Records in TRIM9 and Working with Revisions
- Document Queues (move records from sharedrives to TRIM9)
- Workflow and Action Tracking
- TRIM9 Shortcuts, Hints and Tips

DELIVERY AND LOCATION

- On-site at Callaghan, City and Ourimbah Campus
- Video conferencing (Zoom) – for staff located at other campuses

RECORDS & INFORMATION MANAGEMENT FUNDAMENTALS - TRAINING

TRAINING TOPICS

- What is a University record, why they are important and when to keep them
- What are not University records
- Find out how long records need to be kept, where to keep them and when they can be destroyed
- Learn about your recordkeeping obligation as a University employee under the State Records Act (1998) and other relevant legislation such as Privacy
- Learn about some common assumptions and mistakes people make about records and information and
- Where to go to for assistance

WHO SHOULD ATTEND

All employees of the University (including permanent, temporary, conjoints, professional and academic staff).

DELIVERY AND LOCATION

- Face-to-face at Callaghan, City or the Ourimbah Campus or,
- e-Learning modules on Records Management and Recordkeeping available in Discover.

HOW TO REGISTER

CLICK ON A COURSE NAME BELOW TO VIEW THE COURSE IN DISCOVER AND REGISTER YOUR INTEREST

TRIM9 TRAINING

RECORDS & INFORMATION MANAGEMENT FUNDAMENTALS

FACILITATORS

Records Training

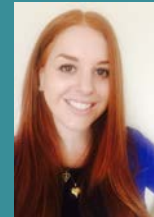
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TRIM Training

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Janine



Bryce



RECORDS E-LEARNING

CLICK ON A COURSE NAME BELOW TO ACCESS THE COURSE IN DISCOVER

RECORDS MANAGEMENT AND RECORDKEEPING TRAINING (ONLINE)

RECORDKEEPING TRAINING FOR SUPERVISORS AND MANAGERS (ONLINE)