TRIM9 Content Manager

Tips & Tricks

Action Tracking

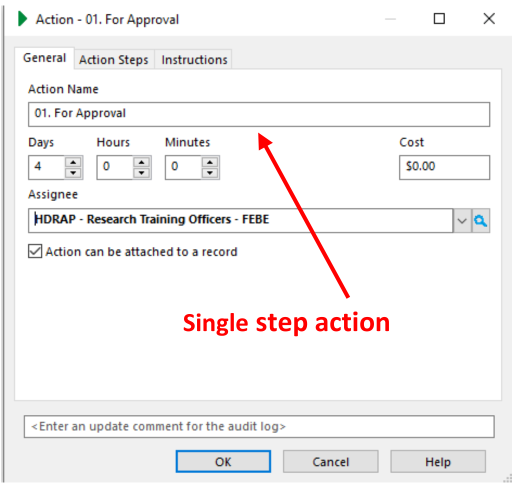
Workflow functionality is possible in TRIM!

See below for all your simple action tracking possibilities

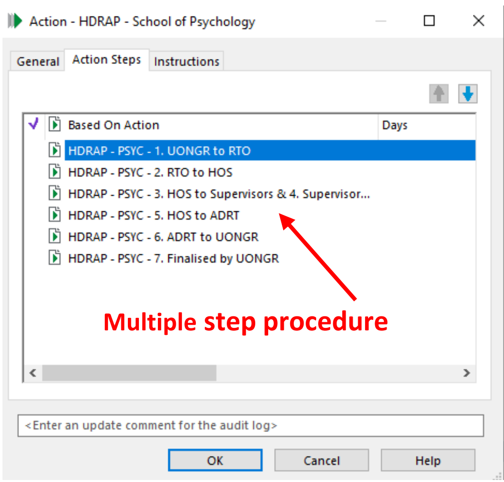
Action tracking allows you to trace the flow of records and the tasks required to be performed throughout the University. Action tracking allows you to assign a:

- single task (action): or
- a sequence of tasks (procedure).

An example of an action is:



An example of a procedure is:



Available Actions for General Use

Action	Purpose
For Review or Comment **3 Days**	**Use:** This action is designed to be used where review or comment is required. This action can be used in isolation of in conjunction with the 'For Appproval' and 'Print for Physical Signature' actions. **Actions:** • Review the document/s • Provide comments • Complete the action in TRIM **Note:** Can also be used in conjunction with 'Return To'

For Approval **3 Days**	**Use:** This action is designed to be used where approval is required. This action can be used in isolation or in conjunction with the 'For Review or Comment' and 'Print for Physcial Signature' actions. It can also be added multiple times for various level of approval. **Actions:** • Review the document/s • If Approved – Complete the action in TRIM • If Not Approved – Seek additional information from the originator **Note:** Can be used in conjunction with 'Return To'
Print for Physical Signature **4 Days**	**Use:** This action is designed for use when a physical signature is required. Before using this action, consider if the 'For Approval' action can be used to obtain approval via a digital signature or email approval. **Actions:** • Print the Document/s • Sign • Scan the document/s at a minimum 300dpi and place over the original • Complete the action in TRIM **Note:** Can also be used in conjunction with 'Return To'
Return To **2 Days**	**Use:** This action is designed to be used when you want to be notified that an action/approval has been completed. Add this after the last action and make the responsible location either yourself or the person you want to be notified when the action sequence has been completed. **Actions:** • Add this action at any point in the process where notification is required • Complete the action in TRIM

Action Tracking Icons and Status Indicators

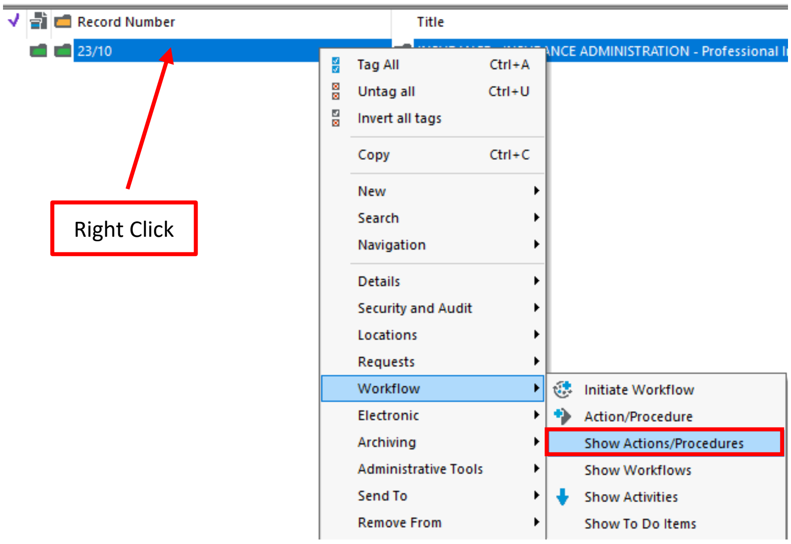
Action tracking icons change according to their status:

- Current Actions and Procedures display green arrows
- Completed Actions and Procedures show a tick in a purple box on a green arrow
- Actions and Procedures that are due next show one exclamation mark in a blue box on a green arrow
- Actions and Procedures that are overdue show one exclamation mark in a red box on a green arrow

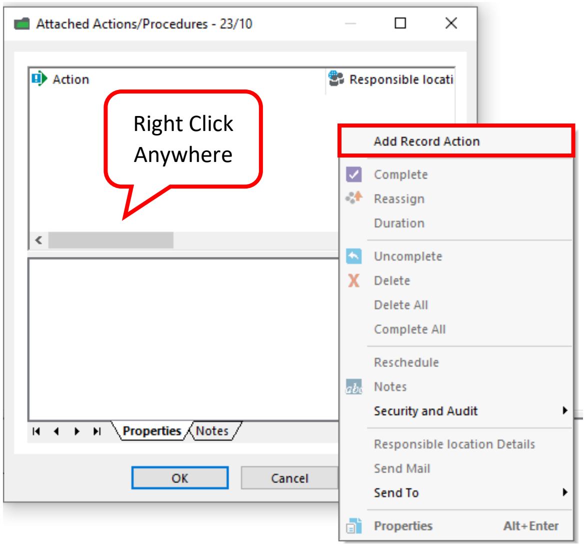
	Current Procedure
	Next Procedure
	Overdue Procedure
	Completed Procedure
	Current Action Step
	Next Action Step
	Overdue Action Step
	Completed Action Step

Adding an Action

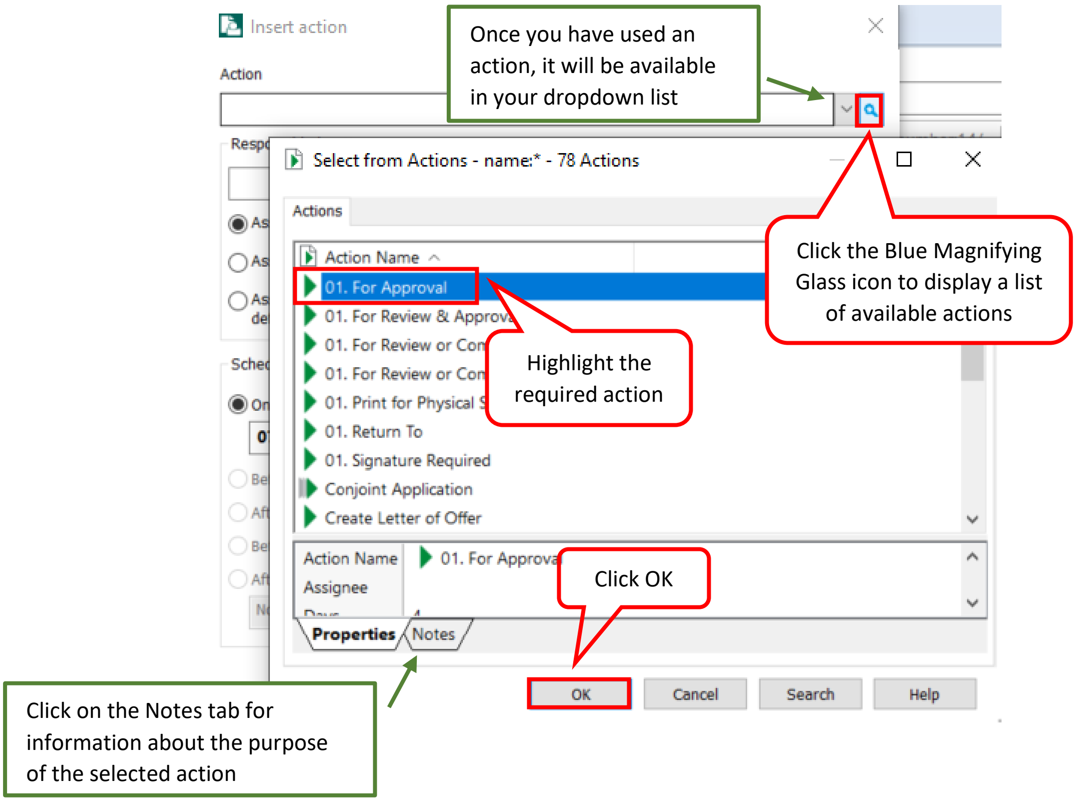
1. Locate the record (document, email, file note, PDF) in TRIM that requires review, comments, approval etc.
2. Right click → **Workflow → Show Actions/Procedures**



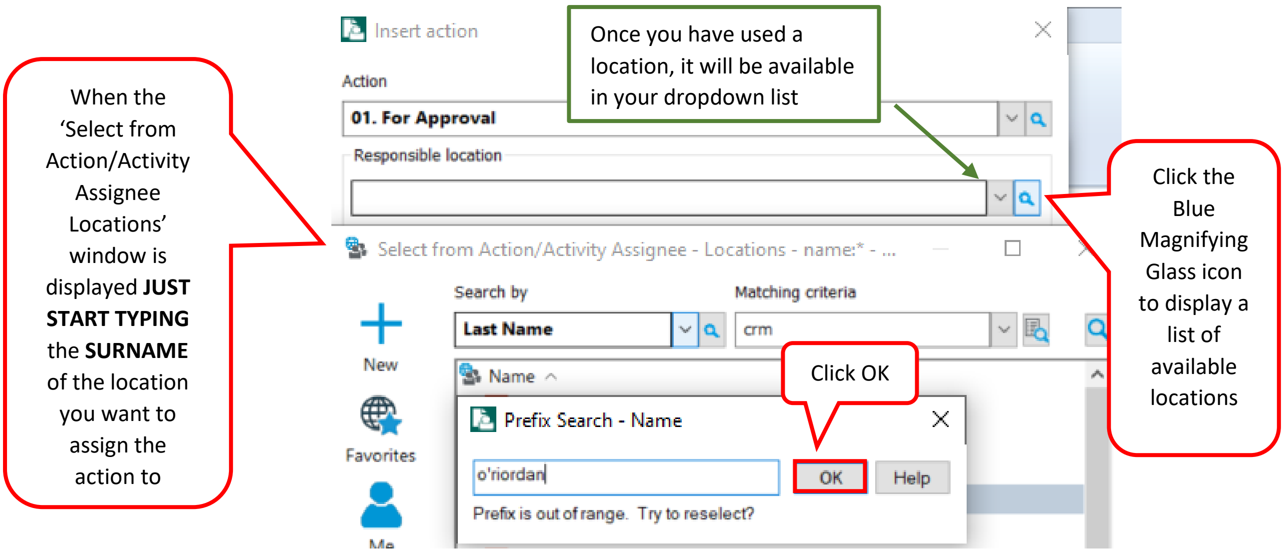
3. Right Click anywhere in the box → **Add Record Action**



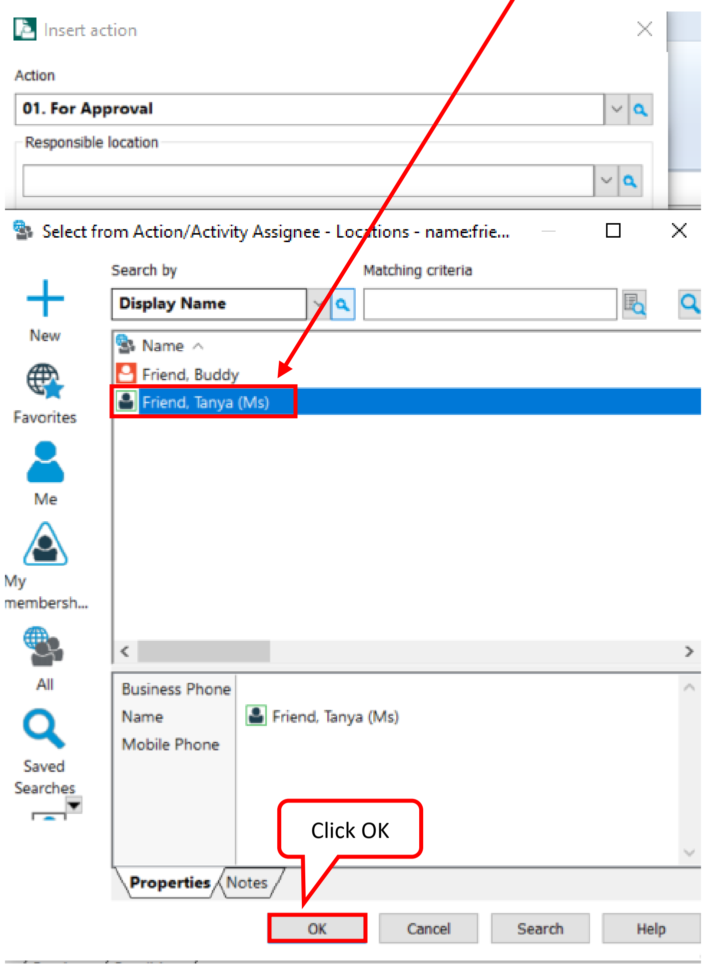
4. Click the blue **magnifying glass** icon to display a list of available actions
5. Highlight the required action → Click **OK**



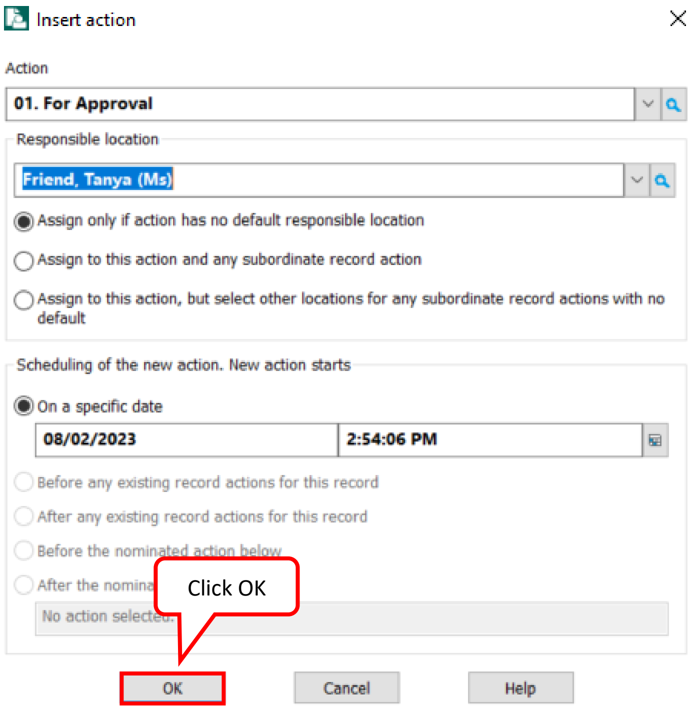
6. Click the blue **magnifying glass** icon on the **Responsbile Location** field
7. When the Select from Action/Activity Assignee Location window is displayed **JUST START TYPING** the **Surname** of the location you want to assign the action to → Click **OK**



8. Highlight the required location (only select locations represented by a green icon) from the list of matching locations displayed → Click **OK**



9. All the other defaults remain the same → Click **OK**



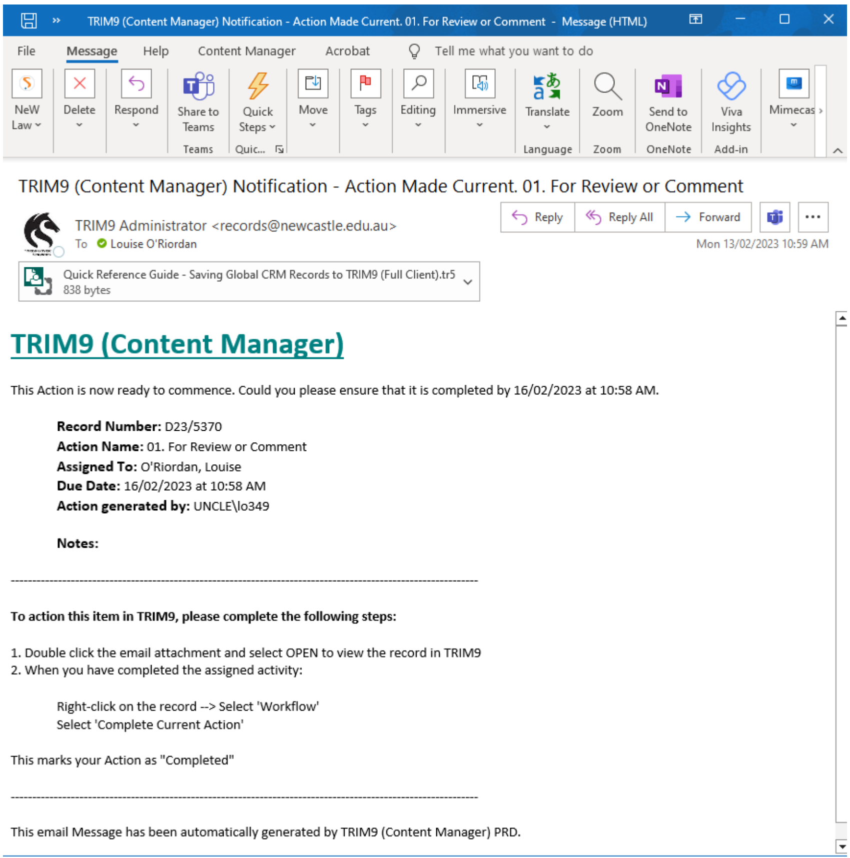
Email Notifications

When an action is assigned to you an automatic email notification **MAY** be sent to your Newcastle University email address. The message subject will contain the Status of the action (e.g. Current, Overdue etc), the **Record Number** and the **Activity** (e.g. For Approval, For Comment etc).

The email will contain:

- An attachment to the record that requires action
- A summary of the Action
- Instructions on how to mark the action complete

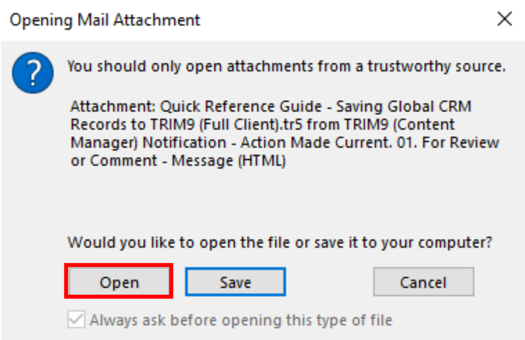
Double click on the attachment to open the document in TRIM



Important!

Email notifications are **not** the most reliable way to check for new and outstanding actions. To ensure you don't miss anything please see below **'Checking your worktrays'** for the best way to keep track of your actions.

Click **Open**



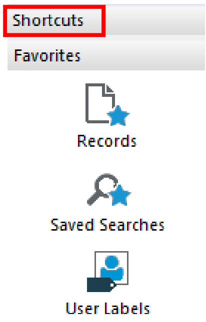
Checking your Worktrays

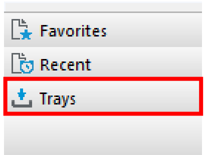
Unfortunately, you may not always receive an email notification of any new or outstanding actions that have been assigned to you. To ensure you don't miss anything you should regularly check your TRIM work trays.

Trays are located on the **Shortcut Bar** down the left side of your TRIM screen.

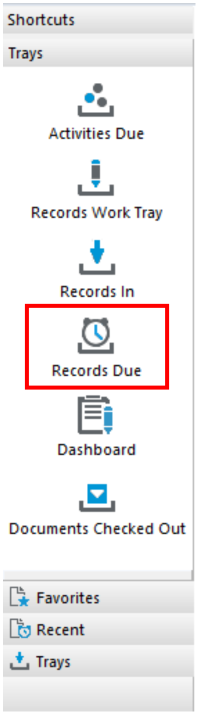
To access your actions:

- Select **Trays** from your **Shortcuts** bar in TRIM





- Click **Records Due** tray

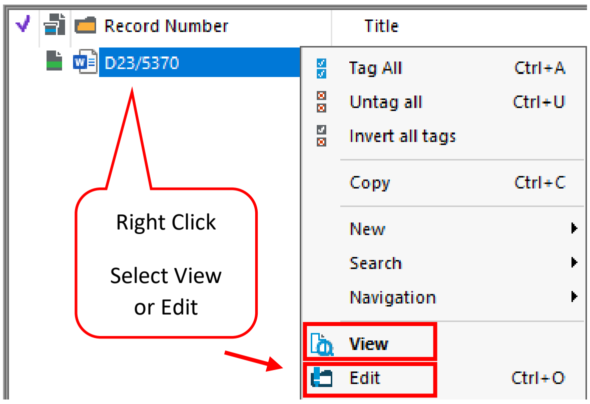


Completing an Action

After retrieving the record you may be required to take action (either open the document to edit or view).

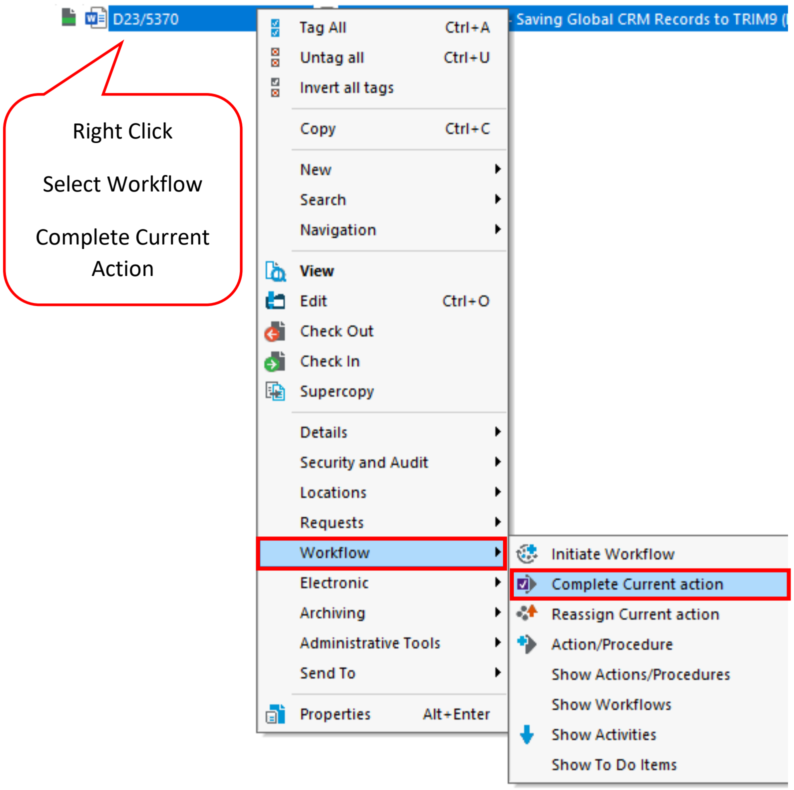
To View or Edit the document

- Right Click
- Select **View** or **Edit**

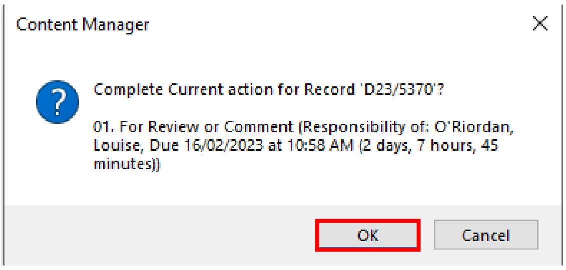


After closing the document, you need to complete the action in TRIM:

- Right Click on the document → **Workflow** → **Complete Current Action**



- Click **OK**



Default TRIM Startup Screen

To set the Records Due tray to be the default window when you open TRIM please click here to be taken to the **Quick Reference Guide – Actions Due – Startup Default**.