

Action Tracking

Workflow functionality is possible in TRIM!

See below for all your simple action tracking possibilities

An example of a procedure is:

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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:

Action - 01. For Approval General Action Steps Instructions	Action - HDRAP - School of Psychology
Action Name O1. For Approval Days Hours Minutes Cost 4 0 0 Assignee So.00 HDRAP - Research Training Officers - FEBE V< ✓ Action can be attached to a record Single Step action	 Based On Action HDRAP - PSYC - 1. UONGR to RTO HDRAP - PSYC - 2. RTO to HOS HDRAP - PSYC - 3. HOS to Supervisors & 4. Supervisor HDRAP - PSYC - 5. HOS to ADRT HDRAP - PSYC - 5. ADRT to UONGR HDRAP - PSYC - 7. Finalised by UONGR
Single Step action <enter an="" audit="" comment="" for="" log="" the="" update=""> OK Cancel</enter>	K Cancel K Cancel

Available Actions for General Use

Action	Purpose		
	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 Review or	'For Appproval' and 'Print for Physical Signature' actions.		
Comment			
	Actions:		
3 Days	Review the document/s		
	Provide comments		
	Complete the action in TRIM		
	Note: Can also be used in conjunction with 'Return To'		

			
	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.		
For Approval	It can also be added multiple times for various level of approval.		
3 Days	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'		
	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.		
Print for Physical	can be used to obtain approval via a digital signature or email approval.		
Signature	Actions:		
olghatare	• Print the Document/s		
4 Days	• Sign		
4 Days	• 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'		
	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		
Return To	you want to be notified when the action sequence has been completed.		
2 Days	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

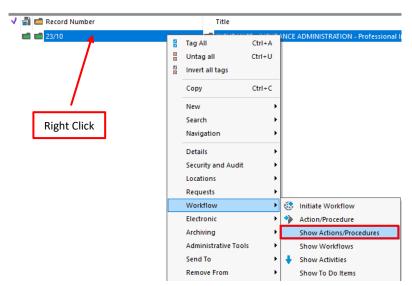
Action tracking icons change according to their status:

- 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

11	Current Procedure
D	Next Procedure
	Overdue Procedure
D	Completed Procedure
•	Current Action Step
D)	Next Action Step
•	Overdue Action Step
2	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 \rightarrow Add Record Action

Attached Actions/Procedures - 23/10 Action	- C X
Right Click Anywhere	Add Record Action
Anywhere	Complete Reassign Duration
<	Uncomplete Uncomplete Delete Delete All Complete All
(()) manufic (Note (Reschedule 728 Notes Security and Audit
II I I I Properties Notes	Responsible location Details Send Mail Send To Properties Alt+Enter

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

Insert action Action	Once you have used an action, it will be available in your dropdown list	
Respt Select from Actio Actions	ns - name:* - 78 Actions	
As As de As de Action Name 01. For Approval 01. For Review & 01. For Review of 01. For Review of	Con	Click the Blue Magnifying Glass icon to display a list of available actions
Sched Or Or O O O O O O O O O O O O O	_{sical s} required action	
Be Aft Be Action Name		~
Aft M Properties Note	Click OK	~
Click on the Notes tab for information about the purpose of the selected action	OK Cancel	Search Help

- 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 \rightarrow Click **OK**

When the 'Select from	Insert action Action 01. For Approval Responsible location	Once you have used a location, it will be available in your dropdown list		
Action/Activity Assignee Locations' window is		Activity Assignee - Locations - name:	*	Click the Blue Magnifying
displayed JUST START TYPING the SURNAME of the location you want to assign the action to	Search by Last Name New Favorites o'riordan	Matching criteria Crm Click Search - Name	~ 🖪	Glass icon to display a list of available locations

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

📐 Insert ad	ction	\times	
Action			
01. For Ap	proval	~ Q	
Responsible	location		
		~ Q	
Select fr	om Action/Activity Assignee - Locations - name:frie —		×
	Search by Matching criteria		
+	Display Name	R	C
New	S Name ^		
æ	E Friend, Buddy		
Favorites	🛃 Friend, Tanya (Ms)		
Me			
Ay nembersh			
	<)
All	Business Phone		~
0	Name Friend, Tanya (Ms)		
Saved	Mobile Phone		
Searches			
_	Click OK		~
	Properties Notes		
	OK Cancel Search	Hel	p

9. All the other defaults remain the same \rightarrow Click **OK**

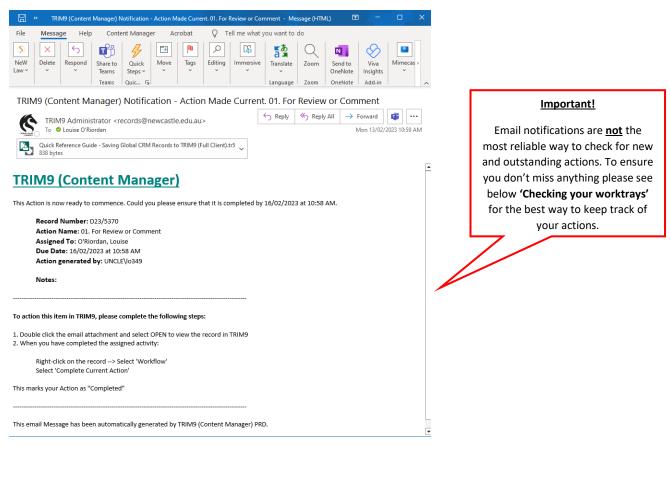
迄 Insert action	×
Action	
01. For Approval	~ Q
Responsible location	
Friend, Tanya (Ms)	~ Q
Assign only if action has no default response	sible location
Assign to this action and any subordinate r	ecord action
Assign to this action, but select other locati default	ions for any subordinate record actions with no
Scheduling of the new action. New action star	ts
On a specific date	
08/02/2023	2:54:06 PM
Before any existing record actions for this r	record
O After any existing record actions for this re	cord
Before the nominated action below	
After the nomina Click OK	
No action selected.	
ОК СА	ancel Help

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

Click Open

Opening Mail Attachment				
You should only open attachments from a trustworthy source. Attachment: Quick Reference Guide - Saving Global CRM Records to TRIM9 (Full Client).tr5 from TRIM9 (Content Manager) Notification - Action Made Current. 01. For Review or Comment - Message (HTML)				
	Would you like to open the file or save it to your computer?			
	Open Save Cancel			
	Always ask before opening this type of file			

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.

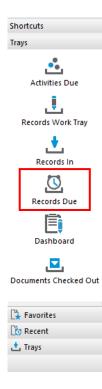
To access your actions:

• Select Trays from your Shortcuts bar in TRIM



🛓 Favorites	
Conterent	
📩 Trays	

• Click Records Due tray

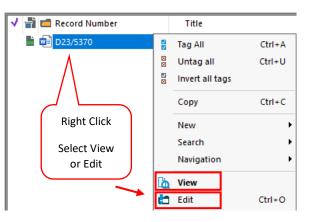


Completing an Action

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

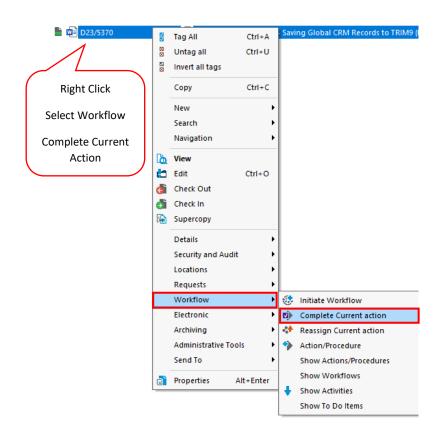
To View or Edit the document

- 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 <u>here</u> to be taken to the **Quick Reference Guide – Actions Due – Startup Default**.