



TRIM9
Content Manager

Tips & Tricks

Requesting Physical Files



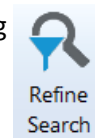
Did you know TRIM manages the University's electronic AND physical records?

See below to find out how you can use TRIM to locate and request a physical file.

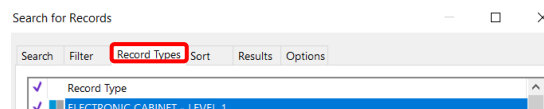
How to find Physical Files/Boxes in TRIM

Click [here](#) to view our previous Tips & Tricks on how to search in TRIM.

- Use these **Tips & Tricks** to search on keywords relating to the information you are trying to locate
- Refine your search by pressing **F7** on your keyboard or clicking

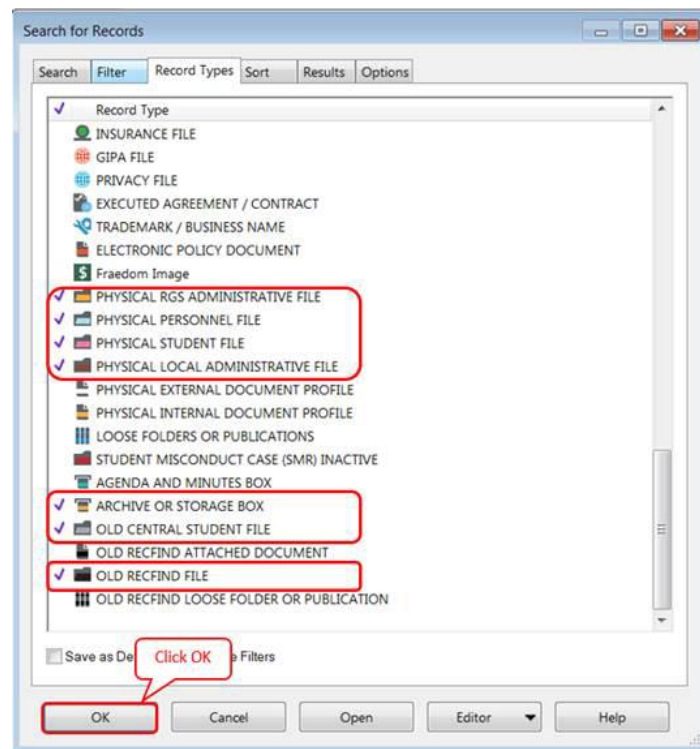


- Select the **Record Types** tab to refine your search to only include results from physical files/boxes



- Untick all record types by **Right Click → Untag All**

- Place a tick next to all record types that relate to physical files or archive boxes (as shown below) → Click **OK**

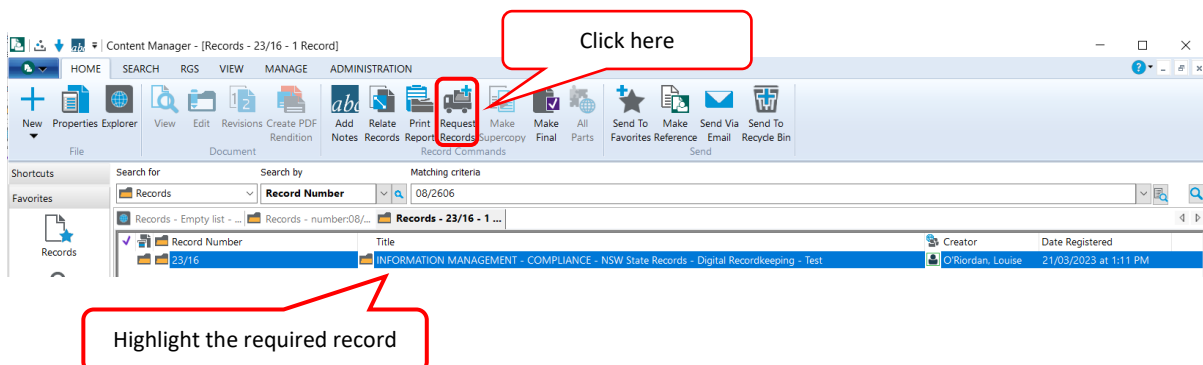


How to Request a Physical File

Requesting a record via TRIM will send a notification to the Records Governance Services team who will then arrange for the retrieval of a physical file or archive box on your behalf.

Once you have located the file you require in TRIM:

- Highlight the record and click on **Request Record** (located on the **Toolbar** tab)



- The **Create a New Retrieve** window will be displayed.

The screenshot shows the 'New Request' window with the 'Details' tab selected. The window title is 'New Request'. Below the title bar, there are tabs for 'Details' and 'Notes'. The 'Details' tab is active, showing the following information: 'Retrieve - Temporary', '23/16', and 'INFORMATION MANAGEMENT - COMPLIANCE | NSW State Records - Digital Re'. Below this, there is a section 'From record home' with a text box containing 'RGS Primary Storage (Records Governance Services - CH222A)'. The 'To requestor' field contains 'O'Riordan, Louise'. The 'Priority' field is set to 'Low'. The 'Date Required' field shows '21/03/2023' and '1:19:28 PM'. At the bottom, there are three buttons: 'OK', 'Cancel', and 'Help'.

Click the **Notes** tab to complete additional **required** information

Priority will default to 'Low'. Click the drop down to modify for urgent requests

Date Required will default to today's date. This can be modified to enable requests on future dates

- On the **Notes** tab enter the delivery location details and any other additional comments → click **OK**

The screenshot shows the 'New Request' window with the 'Notes' tab selected. The window title is 'New Request'. Below the title bar, there are tabs for 'Details' and 'Notes'. The 'Notes' tab is active, showing a text area with the text 'Please deliver to room ATC220'. Below the text area, there are three buttons: 'User Stamp', 'Sp', and 'Add Notes'. At the bottom, there are three buttons: 'OK', 'Cancel', and 'Help'.

Enter delivery details

Click **OK**

Records Governance Services will arrange for records to be ordered and delivered to the requested location.

Place your order by **3pm** and you should receive your records the following day.