



**TRIM9**  
Content Manager

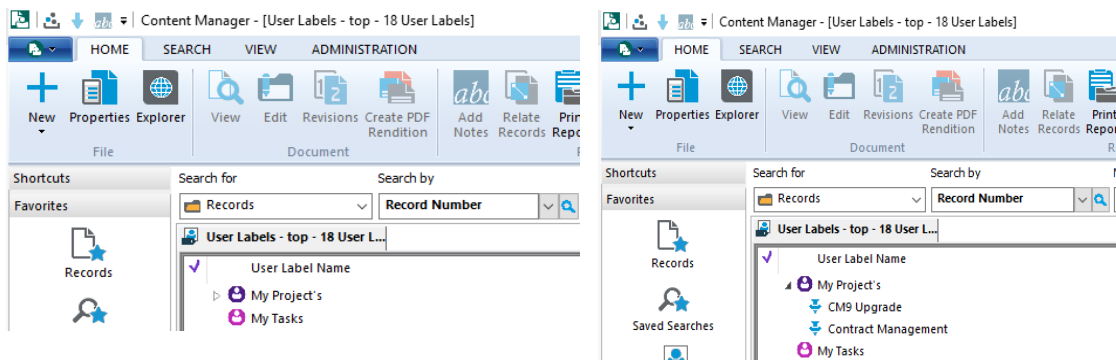
# Tips & Tricks

## User Labels

User labels are a great way to organise and group your records!

TRIM allows you to create your own personalised user labels and apply them to records. This enables you to create a structure for locating and accessing your records that is unique to you. Essentially, you are creating a private shortcut to your records that will eliminate the need to repeatedly perform searches. Each user label can have multiple sublevels and there is no limit to the number of labels that can be created.

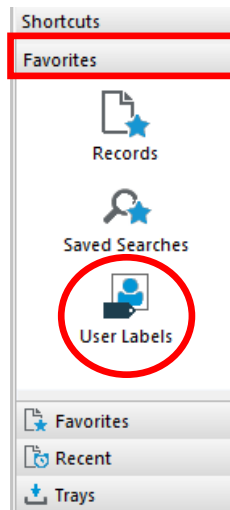
For example, you may create user labels to manage both business as usual tasks or specific projects:



# Create User Labels

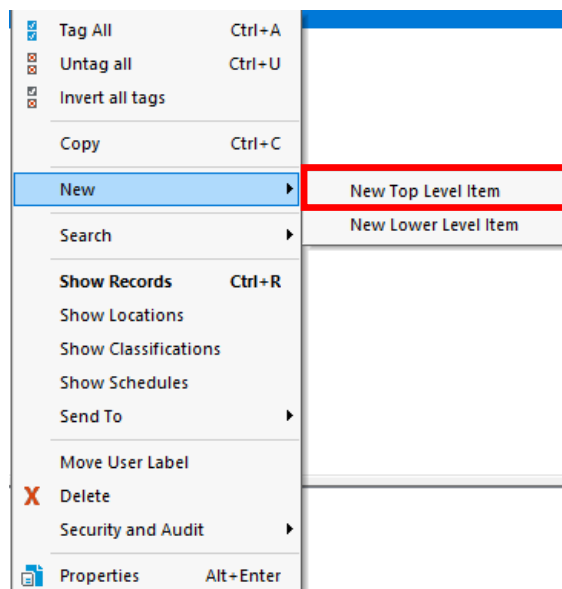
Navigate to user labels:

- Select **Favourites** from the Shortcut Pane (left hand side of TRIM interface)
- Select **User Labels**

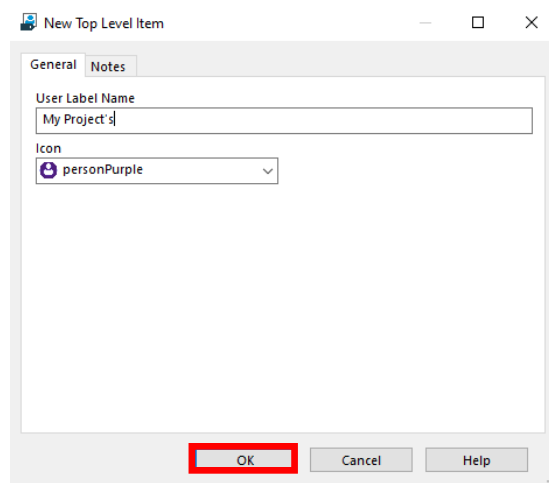


To create a new user label:

- Right click in the blank space
- Select **New → New Top Level Item**

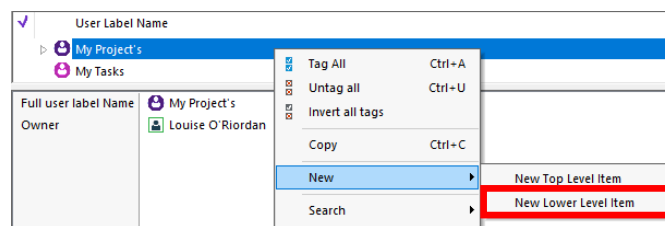


- Enter a unique name for your user label (e.g. a specific project or task relating to that group of records) and select an icon → Click **OK**



To create a sub-level to your user label (as shown in the 'My Project's example above):

- Right click on the new top level label
- Select **New → New Lower Level Item**

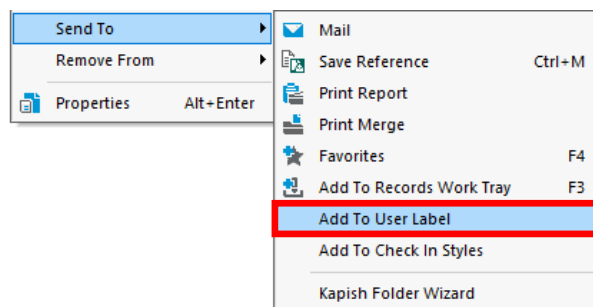


- Title the New Lower Level user label and select a icon → Click **OK**

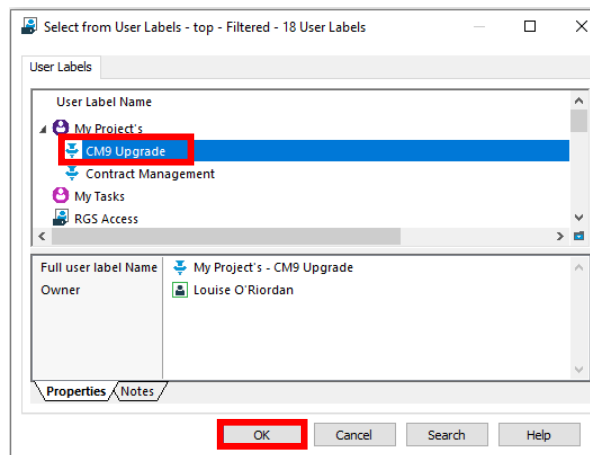
Continue this process until you have created all labels and sub-level labels you require.

## Send Records to User Labels

- Locate the records required (click [here](#) for tips on searching)
- Tag the records you wish to send to the label
- Right click → **Send To → Add to User Label**



- Navigate to the required user label from the list provided
- Select the appropriate label → click **OK**



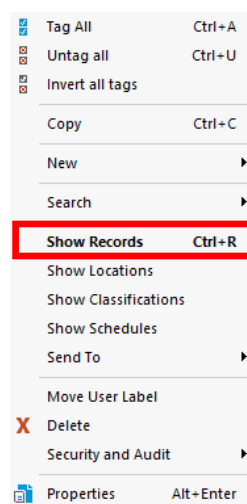
**Note:** you can keep adding as many records as you'd like to the User Label, at any time. You can remove a record from a User Label by right-clicking on the record → **Remove From** → **Remove from User Label**.

## Access Records via User Labels

Navigate to your new user labels (shortcut panel → Trays → User Labels)

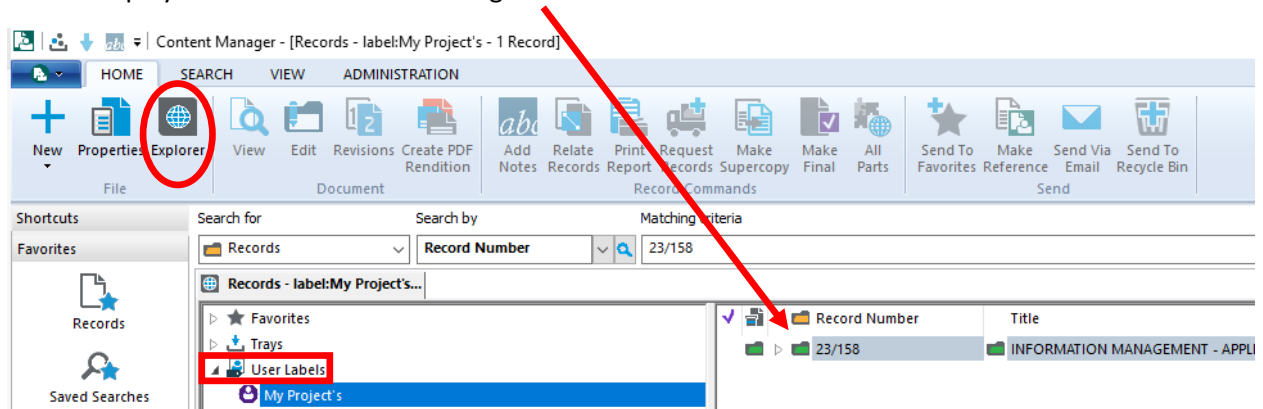
To view the records you have attached to your user label you can either:

- Double click on the required user label
- Right-click on the User Label → Show Records



The next screen will show you a list of all the records that you have sent to that user label.

User labels are also accessible via the Explorer Window. The records you have sent to that user label will be displayed in the window on the right.



## Modify a User Label

To modify the title or the icon of the user label:

- Right-click on the User Label → **Properties**

## Remove a User Label

When you no longer require a user label:

- Right-click on the User Label → **Delete**