



TRIM9
Content Manager

Tips & Tricks

Agreement / Contract Record Type

Wanting to know how you should be storing your contracts and agreements?

Read below to find out!

In a previous Tips & Tricks we discussed the importance of identifying contracts and agreements as high value records of the University and the requirement that these be captured in the University's approved records management system, TRIM. Click [here](#) to review what a contract/agreement is and how long these must be retained for.

Did you know we created an '**Executed Agreement / Contract**' record type specifically to manage contracts and related contract information?

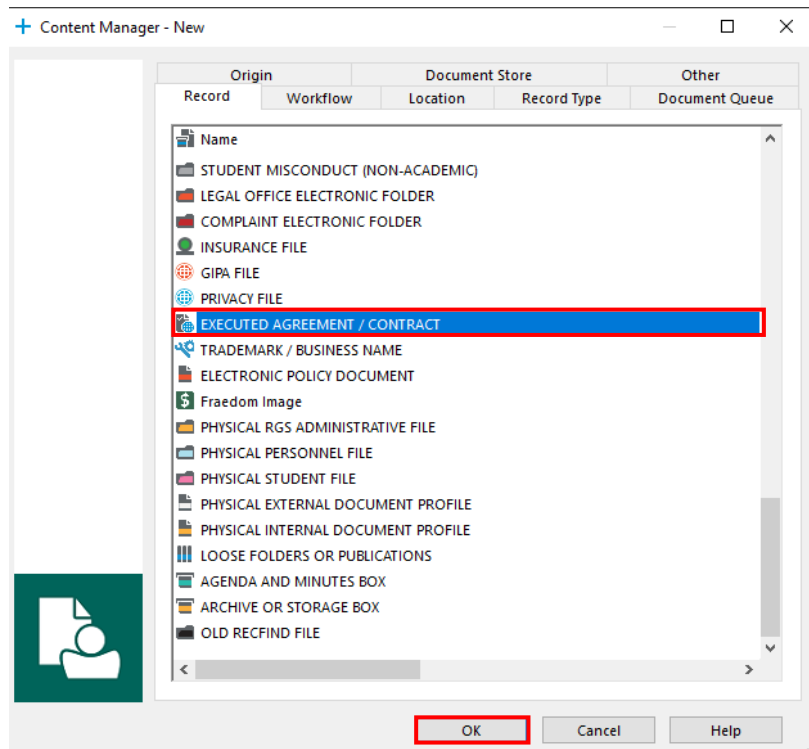
The 'Contract' record type is designed to capture specific contract information/metadata which can be reported on and assist with the effective and timely management of all University contracts. Coupled with a TRIM workflow tool, you can streamline and monitor the review and approval process, identify bottle necks, store, protect, and easily find your contracts.

The Record Type

When registering your electronic contract into TRIM you are prompted to first select a record type → **Select Executed Agreement / Contract** from the list of available record types and click **OK**.

Note: This record type should only be used for finalised/executed contracts.

For draft contracts – select 'Electronic Document' and ensure 'Draft Contract' is included in the title when registering.



Enter the specific details of the contract/agreement into the required fields on the metadata entry form:

The screenshot shows the 'New EXECUTED AGREEMENT / CONTRACT' form. It has tabs for 'General Information', 'International Details', and 'Notes'. The 'General Information' tab is active. The form contains several sections with fields and dropdown menus. Red callout boxes provide instructions for specific fields: 'Enter the relevant parties' points to the 'Parties to Agreement' section; 'Click the blue magnifying glass button to select a Country' points to the 'Country' dropdown; 'Click the blue magnifying glass button to choose the appropriate agreement type' points to the 'Agreement Type' dropdown; 'Enter UON Contact, Delegated Signing Authority, and date details in the required fields' points to the 'UON Contact', 'Delegated Signing Authority', 'Agreement Start Date', 'Agreement End Date', 'Date of Final Signature', and 'Date For Review' fields; and 'See below 'Creating a Contract Folder' to find out where to save your contract' points to the 'Action Taken' text area.

Title Naming Convention

Contract – [Name of Contract] – [Date]

Enter the relevant parties

Click the blue magnifying glass button to choose the appropriate agreement type

Click the blue magnifying glass button to select a Country

Enter UON Contact, Delegated Signing Authority, and date details in the required fields

See below 'Creating a Contract Folder' to find out where to save your contract

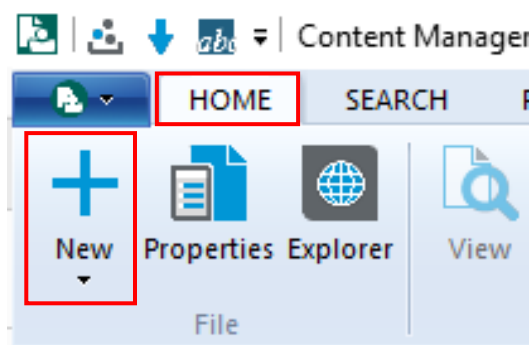
If required, the location of the physical record of the contract/agreement can also be noted on this form.

Please Note: Searching capabilities are available for each of these metadata fields. For more information on how to search on these fields please click [here](#) or contact Records Governance Services at records@newcastle.edu.au

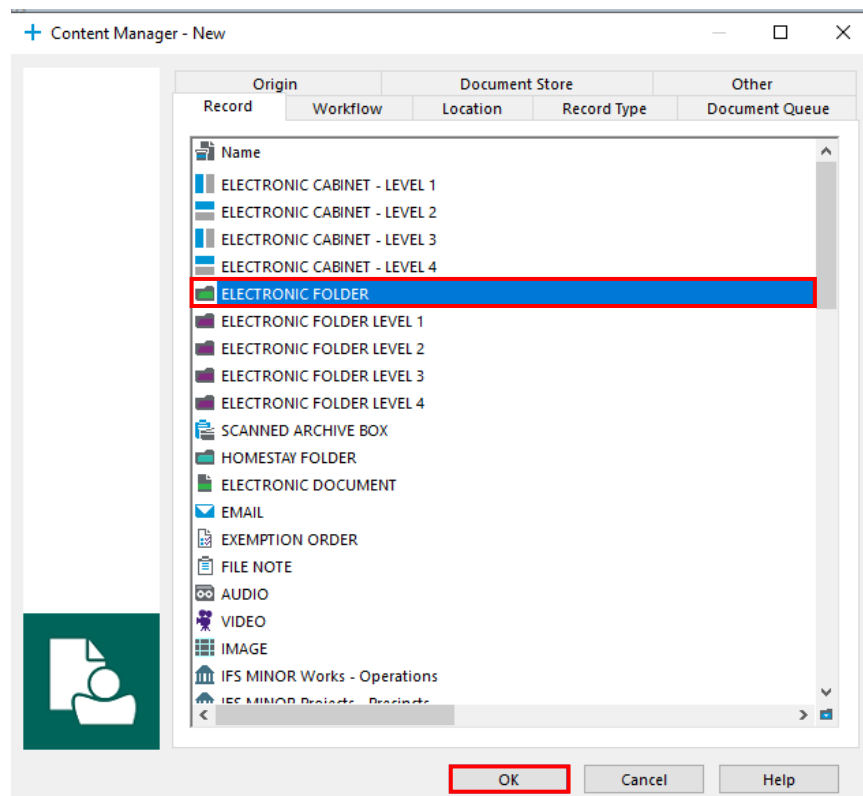
Creating a Contract Folder

A new electronic folder should be created specifically for each contract.

Open **TRIM** → Select the **Home** tab → Click **New**



Select **Electronic Folder** from the list of available record types → click **OK**



Enter the required metadata → click **OK** when complete

Enter a title – outline who the contract is with and what the contract is for

Click the blue magnifying glass to choose an appropriate classification under 'Contract Management'

OK Cancel Help

The **Kapish Folder Wizard** will open. Select the **CONTRACT MANAGEMENT – CONTRACTS** template from the list and click **OK**.

Record Nu...	Title
14/663	HUMAN RESOURCES - HEALTH AND SAFETY - REVIEW - RESEARCH - TRIM Folder Wizard Template
14/664	HUMAN RESOURCES - HEALTH AND SAFETY - REVIEW - TEACHING - TRIM Folder Wizard Template
14/665	RESEARCH (ACADEMIC) - ETHICS - Animal - TRIM Folder Wizard Template
14/666	RESEARCH (ACADEMIC) - ETHICS - Human - TRIM Folder Wizard Template
14/671	COMMERCIAL OPERATIONS - TENDERING - TRIM Folder Wizard Template
14/1163	GOVERNANCE - ELECTIONS - TEMPLATES & MANUALS - Kapish Elections Folder Wizard Template
14/1167	GOVERNANCE - COMMITTEES - COUNCIL - Use this Template for AS, TLC & RES - Committee Year - Kapi
14/1173	STUDENT ADMINISTRATION - SCHOLARSHIPS - Folder Wizard Template
14/1429	CONTRACT MANAGEMENT - CONTRACTS - Kapish Folder Wizard Template
14/4193	GOVERNANCE - COMMITTEES - COUNCIL - Year - Kapish Folder Wizard Template
14/4211	GOVERNANCE - COMMITTEES - NOMINATIONS AND GOVERNANCE COMMITTEE - Committee Year - K
14/4245	GOVERNANCE - COMMITTEES - DEVELOPMENT COMMITTEE - Committee Year - Kapish Folder Wizard

OK Cancel

This will automatically create a set of subfolders within your new electronic folder to effectively manage all documents and information relating to the contract.

Records - 23/11 - 1 Record		
Record Number	Title	
23/11	CONTRACT MANAGEMENT - CONTRACTS - GOODS AND SERVICES CONTRACTS - OTHER - Micro Focus - Support and Maintenance for CM Records Manager - 2023	
23/11/5	Proposals / Approvals	
23/11/4	Drafts	
23/11/3	Correspondence	
23/11/2	Legal	
23/11/2/3	Correspondence	
23/11/2/2	Agreements	
23/11/2/1	Legal Office Advice (This Folder and it's contents have security / access restricted to Legal Office staff)	
23/11/1	Executed Agreement	

*** *Note – Kapish Folder Wizard will only initiate for staff with the Kapish software installed on their PC.*

