# AGREEMENT / CONTRACT RECORD TYPE

Wanting to know how you should be storing your contracts and agreements? Read below to find out.

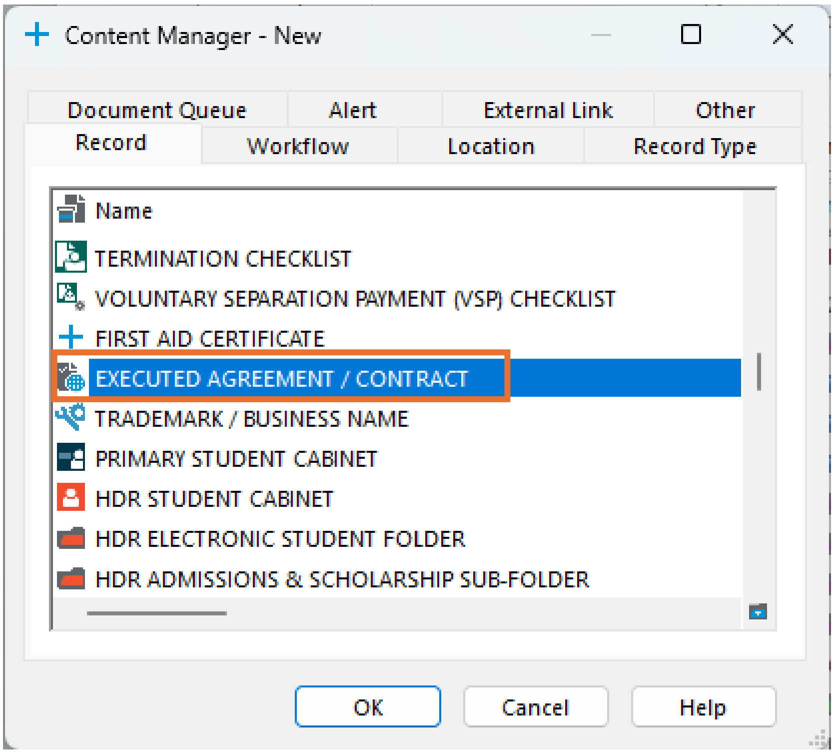
In a previous Tips & Tricks we discussed the importance of identifying contracts and agreements as high value records of the University and the requirement that these be captured in the University's approved records management system, TRIM. Click the following link to review what an agreement/contract is, and how long these must be retained for: https://www.newcastle.edu.au/trim/pdf-document?docid=D17/165314

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

This 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:**

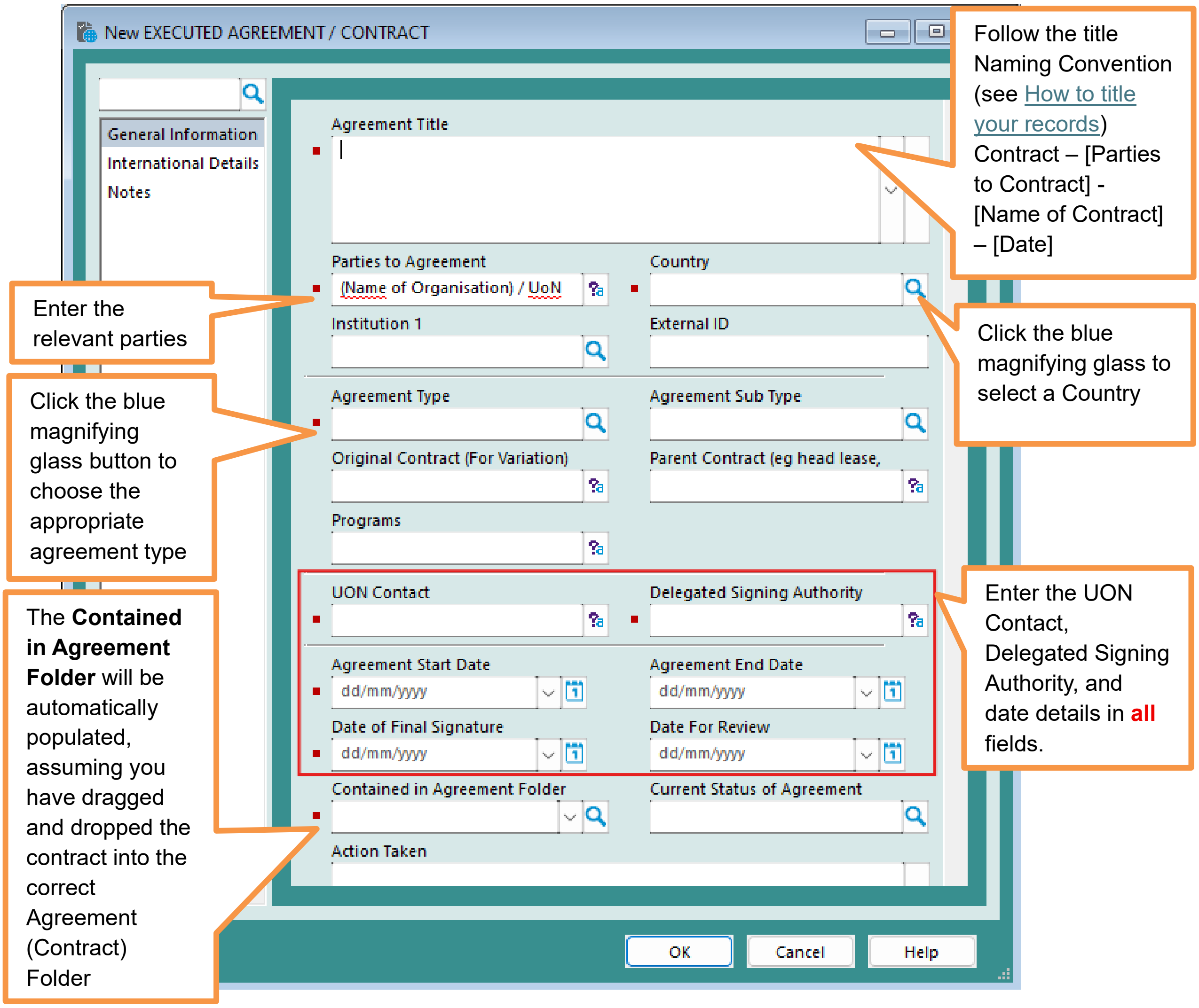



**NOTE:** This record type should only be used for **finalised / executed agreements**

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

**NOTE:** A Contract Folder should be created in TRIM for each specific contract, and this needs to be created prior to saving the Executed Agreement / Contract to TRIM. See below **Creating a Contract Folder** for more information.

Enter the specific details of the agreement/contract into the required fields on the metadata entry form, then click **OK**:




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

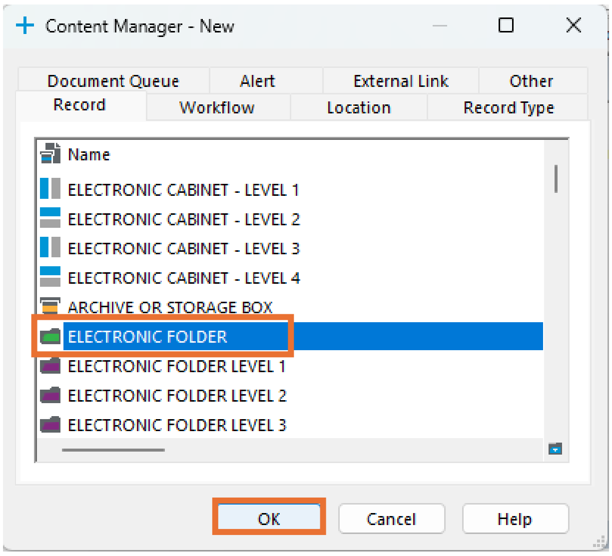
**NOTE:** Searching capabilities are available for each of these metadata fields. For more information on how to search on these fields, see the following link: https://www.newcastle.edu.au/trim/pdf-document?docid=D17/165274 or contact Records Governance Services at records@newcastle.edu.au

## CREATING A CONTRACT FOLDER

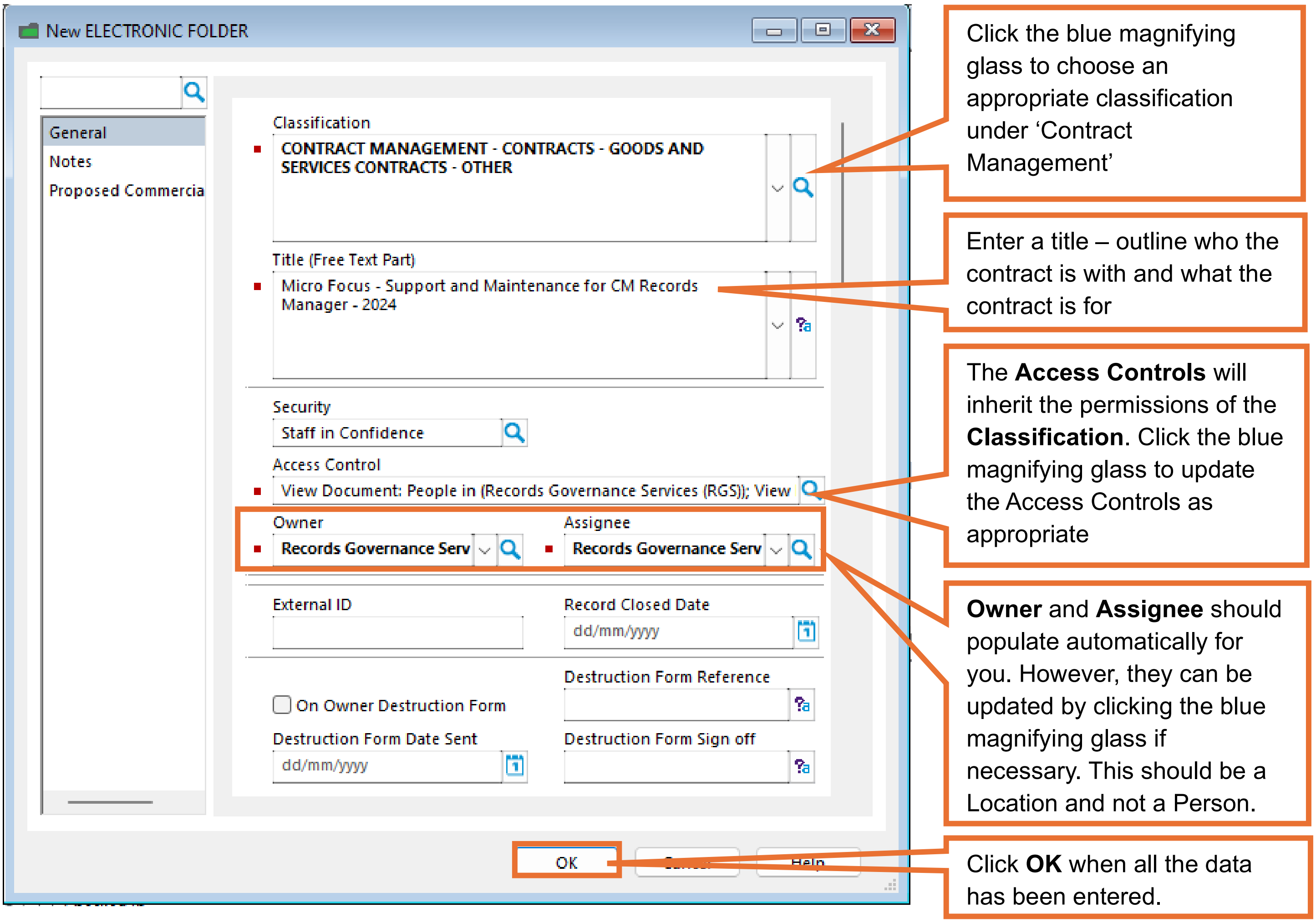
A new electronic folder should be created specifically for each contract.

**NOTE:** The following instructions are based on the premise that your team has already undertaken an initial structure setup conducted by the Records Governance Services Team and will assist you in your ongoing records management. If you are working in TRIM for the first time, please contact the Records team on records@newcastle.edu.au to assist with initial set up for Contracts Management.

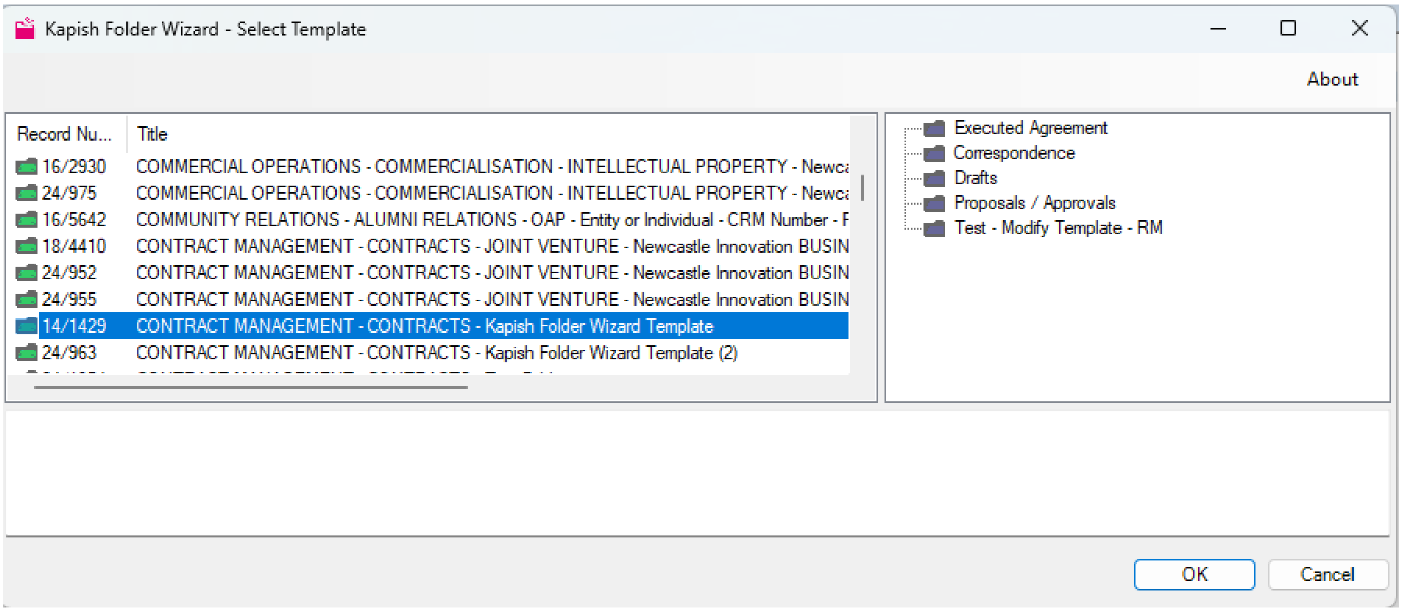
1. Open TRIM > Select the **Home** tab > Click **New**
2. Select **Electronic Folder** from the list of available record types and click **OK**



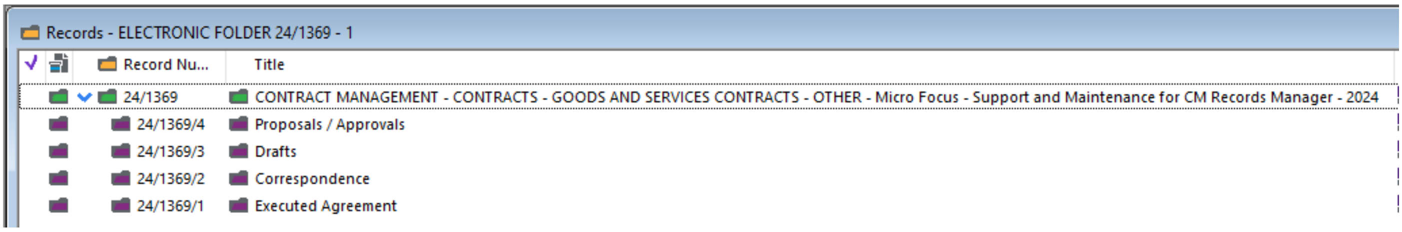

3. Enter the required metadata > click **OK** when complete



If you have the **Kapish Folder Wizard** installed on your device, the **Kapish Folder Wizard – Select Template** window will appear. Select the **CONTRACT MANAGEMENT – CONTRACTS** template from the list and click **OK.**




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




**NOTE:** Kapish Folder Wizard will only initiate if the Kapish software is installed on your device.