TRIM9
Content Manager

Tips & Tricks

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Further assistance and knowledge guides are available on the Records Governance website:
https://www.newcastle.edu.au/current-staff/our-organisation/governance/legislation-and-compliance/records-governance/training-and-support

RECORDS GOVERNANCE SERVICES
THE UNIVERSITY OF NEWCASTLE

Predictive Text

This option allows TRIM9 to suggest titles based on the first letters typed. This prediction is based on previous record titles. This option can be enabled / disabled by:

- Click the blue **File** button on the top left toolbar – Select **Options**
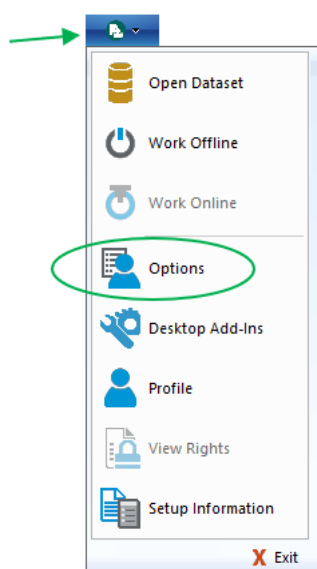
NOTE – This option only applies to 'title' fields. This will not impact searching fields.

- Click the **User Interface** tab and select **Enable predictive mode on title field**
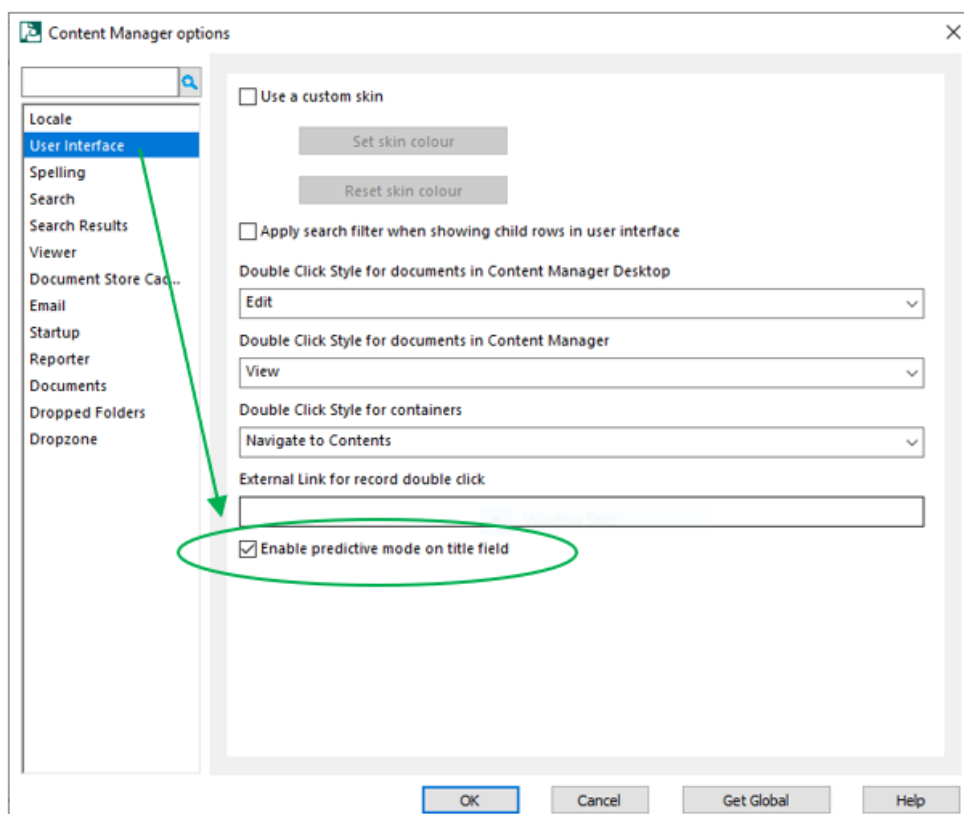
Pressing ENTER to save a document

## Have you noticed a change of behaviour when pressing ENTER after titling a new record?

Previously a user could press ENTER when in the title field and the record would proceed to save to TRIM. Post upgrade, users may find that pressing ENTER now returns a new line in the title; requiring the user to mouse-click on OK to save the record.

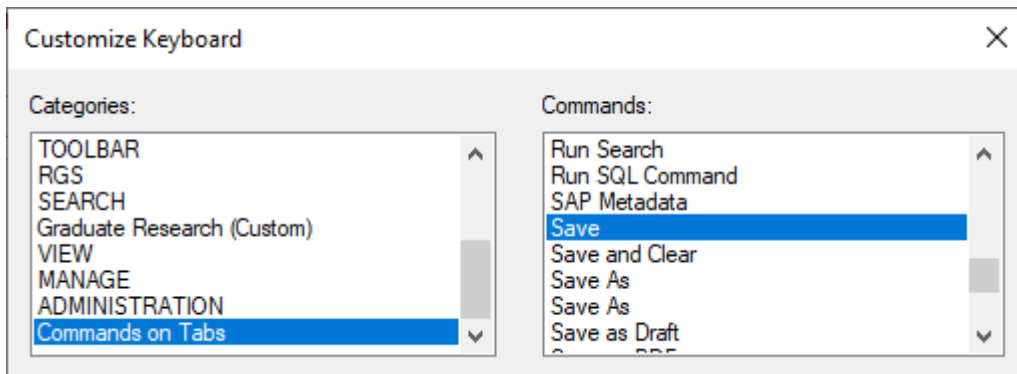To enable ENTER for saving records you will need to setup a keyboard command:

- Right-click anywhere in the TRIM9 toolbar ribbon – Select **Customise the Ribbon…**
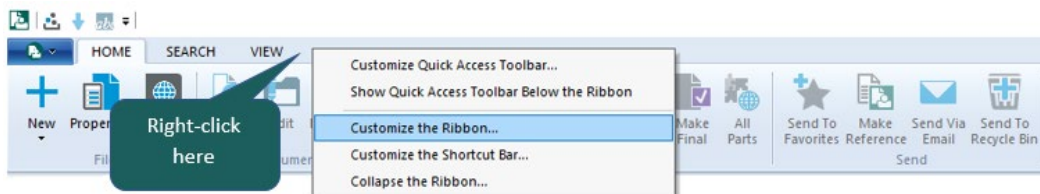
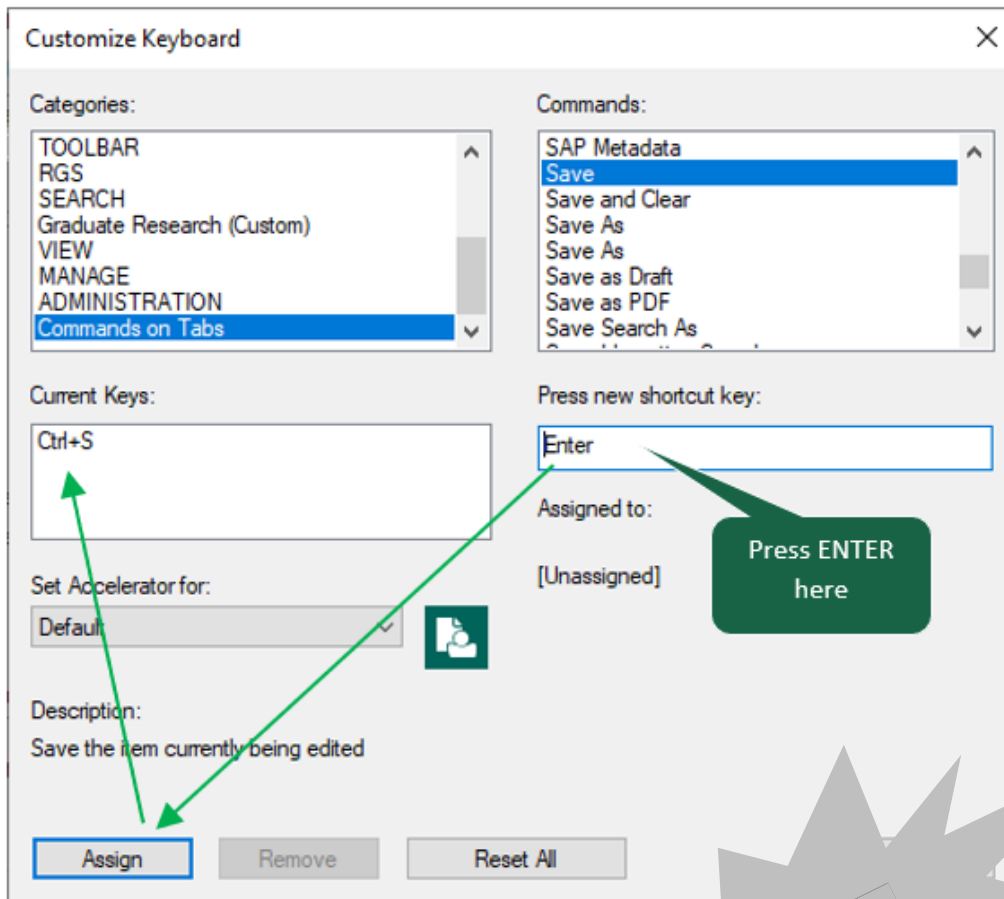

- Click **Customize…** the Keyboard shortcuts
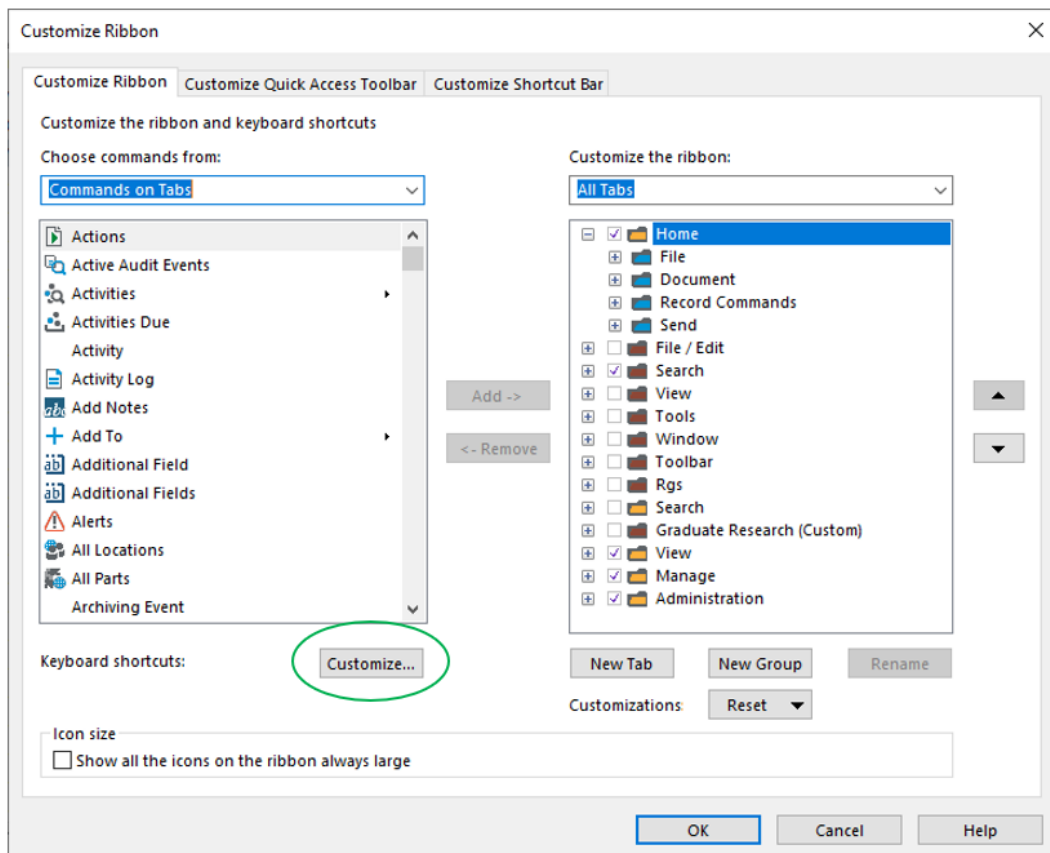
- Select the following **Categories** and **Commands:**

- Define the action by pressing the **ENTER** key inside the **'Press new shortcut key'** field
- Click **Assign** to allocate the action to the **Current Keys:**

- Click **Close** and click **OK** to confirm customisation

*NOTE* – This command will only apply to documents, NOT emails

PDF Rendering

This functionality enables a user to create a PDF Rendition of an existing document within TRIM9. PDF is a recommended and suitable archiving and long-term preservation format for electronic documents.

A user will likely create a PDF Rendition of a document:

- To store a final version of a document
- To store an authorised version of a document
- When you do not want other users to edit a document
- For long-term archival purposes

- Locate and highlight the document in TRIM9
- Select the **Home** tab on the toolbar and click **Create PDF Rendition**
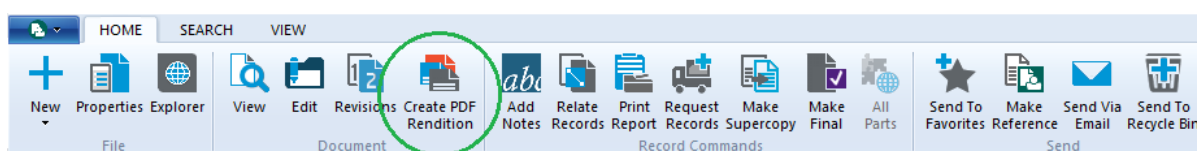
(Alternatively, right-click on the document select **Electronic → Rendering Requests → Create PDF Rendition**)

- Tick **Promote the requested rendition to be the latest revision of the document** if required (recommended), click **OK.** The document will now convert into a PDF.
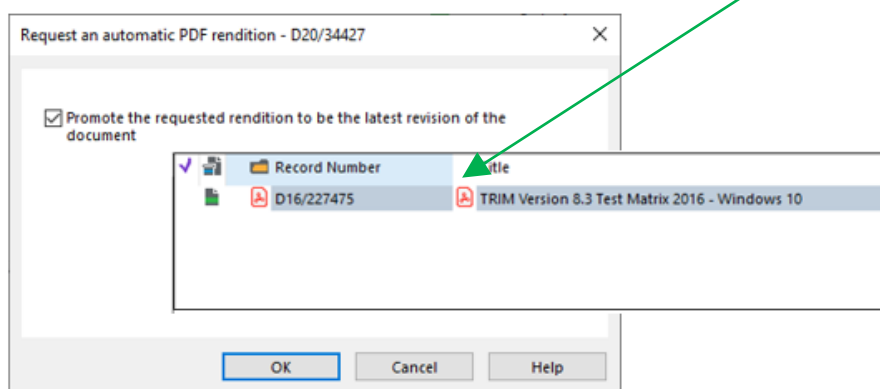

Note – once a record has had a PDF rendition requested it can not be reversed. However, TRIM9 will create the PDF as a new revision. Review the Revisions and version control in TRIM Quick Reference Guide to learn how to locate the original version of the document and promote it back to the latest version.

Outlook – Open Record

This function allows users to navigate to an email from Outlook that was previously checked in.

- Locate the (previously checked-in) e-mail in Outlook
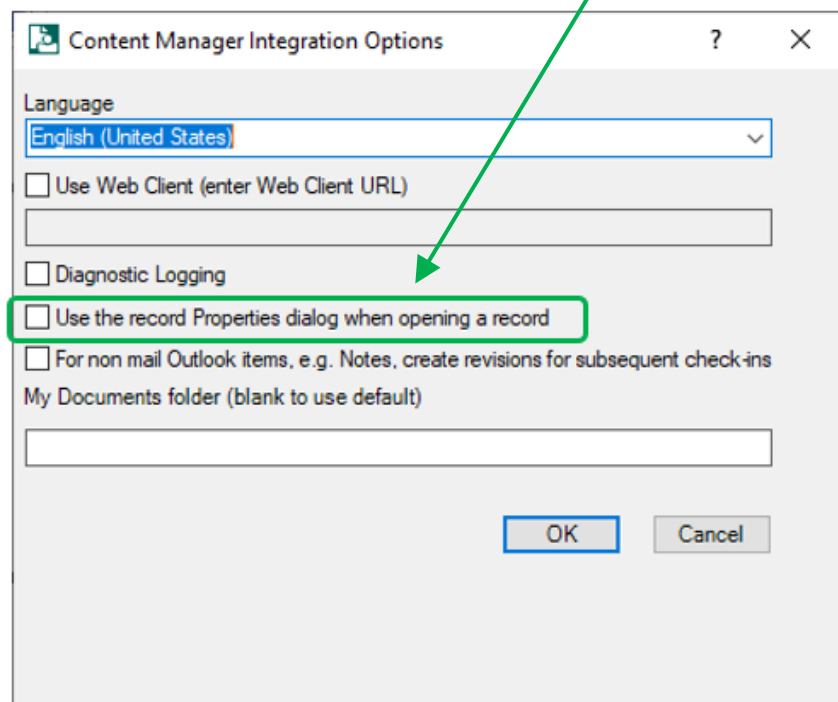- Click **Open Record** on the Content Manager ribbon
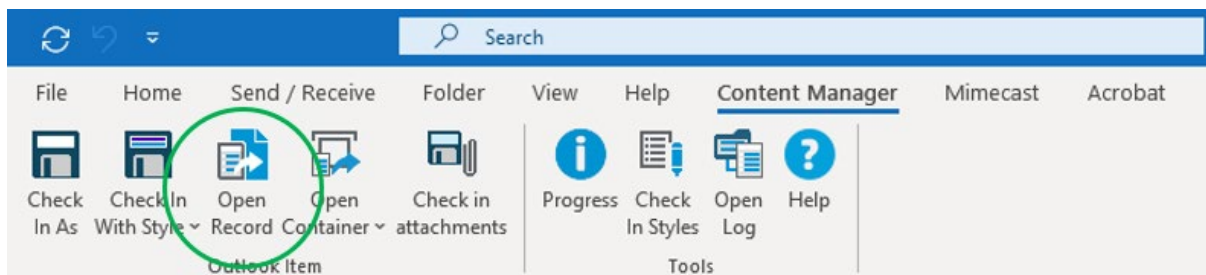
If, when clicking Open Record, you are not navigated directly to the record in TRIM (i.e. the record metadata is instead displayed), you will need to enable the functionality:

- Open **Outlook** – Click **File** – Click **Content Manager Options**
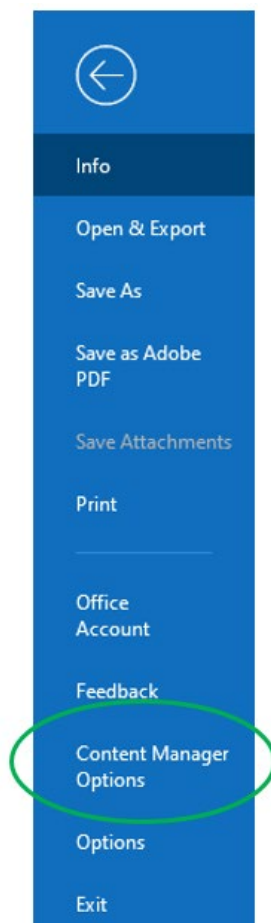
- Untick **Use the record Properties dialogue when opening a record**

- Click **OK**

Outlook – Check In Styles & Linked Folders

Check In Styles provide a method to pre-define criteria for registering a record into TRIM. After creating a Check In Style a user can bypass entering the pre-defined criteria by selecting the Check In Style at the time of registration.

This feature is useful when registering multiple records into TRIM that contain matching criteria fields e.g. all records are the same record type, all records have the same author, OR all records need to be registered to the same container.

In addition, a previously created Check In Style can be linked to an Outlook Folder. Once linked, the user can drag and drop an email into the linked Outlook folder and automatically register the email into TRIM without needing to manually select the Check In Style each time. This method enables users to choose to completely bypass the TRIM data entry form for efficiency.

This feature is useful when registering multiple records into TRIM that contain matching criteria in ALL fields e.g. all records contain the same record type, same author AND are registered to the same container.

Create a Check In Style

- Open **Microsoft Outlook** and click the **Content Manager** tab. Select **Check In Styles**.
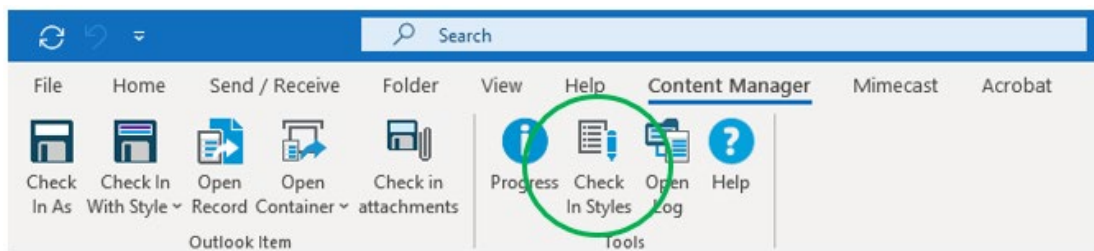
- The **Content Manager Check In Style dialog box** will open, click the **'plus'** sign to create a new Check In Style.
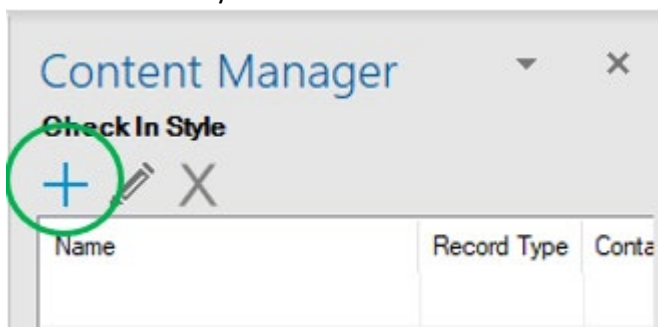
- The **Check in Style creation form** will open. Fill out the form as required and click **OK** to save.

Name – mandatory field. The name of the Check In Style that will be displayed in the styles list.

Record Type - mandatory field. Record Type to be used for checking in. Selecting the folder icon will open the 'Select from Record Types' dialogue with available Record Types to use.

Container - this is the TRIM container used to contain a record.

Alternative Container - select the container that the document will be alternatively contained within on check in.

Addressee - select the location that will be set as the document's Addressee.

Set Default Author Option - define what location will be assigned as the Author:
- **No Default** - the Author field will be left blank
- **Current User** - sets the Author based on the current user
- **Current User Unit** - sets the Author based on the current user's default team
- **Specified User** - sets the Author to the specified location. If this option is selected, then a location must be selected for the **Specific Author** field. Either select the Author from the drop-down list, or use the KwikSelect to search for the required location.

Show check in dialogue - Displays the record entry form when checking in an email.

Delete after check in - Send the email to the Outlook 'Deleted Items' folder after the email has been checked into TRIM.

Only catalog the attachments of email messages - Check in the email attachments only.

Check an email into TRIM using a Check In Style

- Open **Outlook** – select the email that is required to be checked into TRIM
- Click the **Content Manager** tab on the Outlook ribbon and select **Check In With Style**
- Select the required check in style from the drop-down

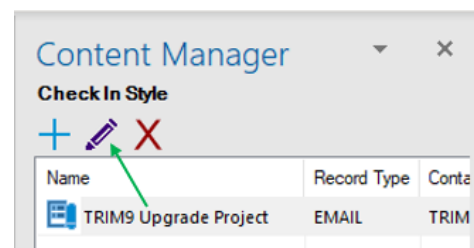Confirm details and click OK to save
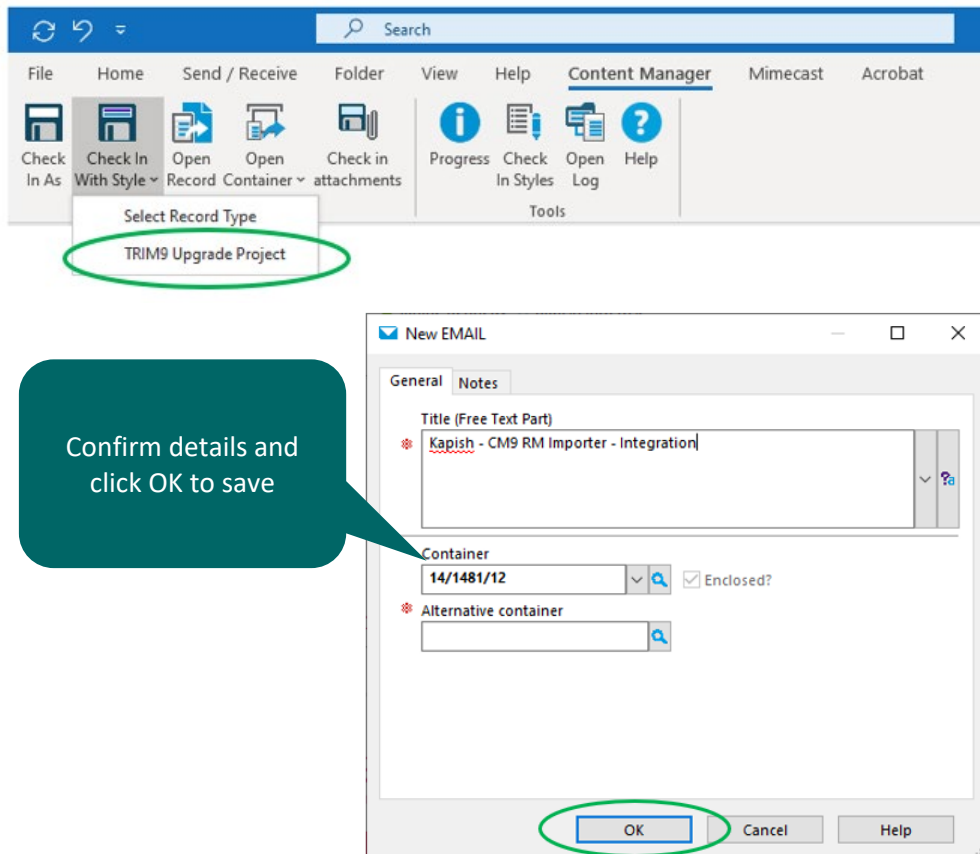
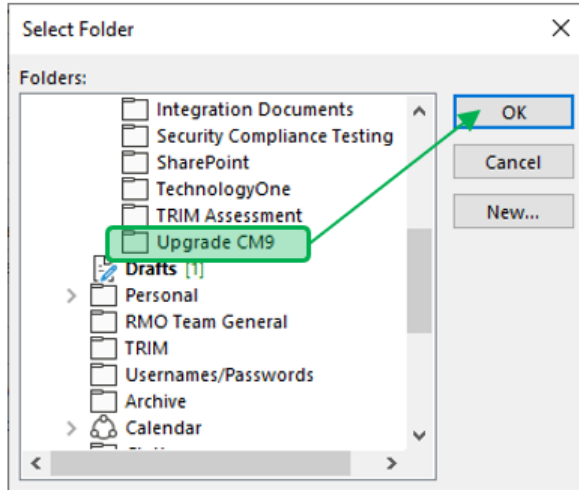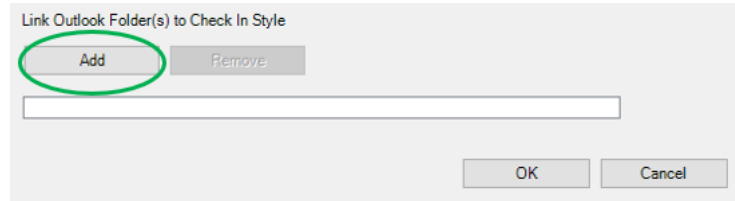# Link an Outlook Folder to TRIM via a Check In Style

- Open **Outlook** – Select **Check In Styles** from the Content Manager tab
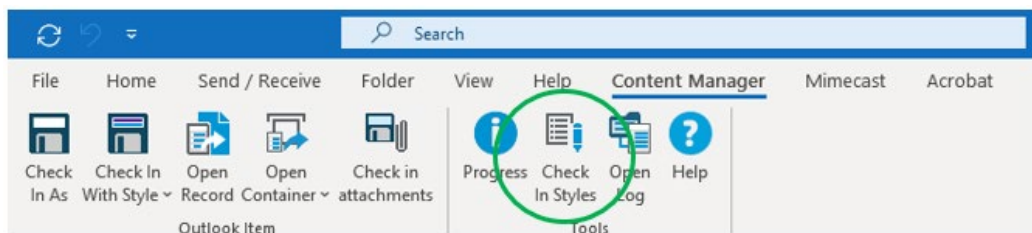
- Highlight the Check In Style you want to link to the Outlook folder – Click the **Edit Check In Style** button (pencil)

- At the bottom of the Check In Style 'properties' form – click **Add**

Link Outlook Folder(s) to Check In Style

| Add | Remove |

| OK | Cancel |

Select Folder ×

Folders:

- Integration Documents
- Security Compliance Testing
- SharePoint
- TechnologyOne
- TRIM Assessment
- Upgrade CM9
- Drafts [1]
- Personal
- RMO Team General
- TRIM
- Usernames/Passwords
- Archive
- Calendar

| OK |
| Cancel |
| New... |

- Highlight the required Outlook folder
- Click **OK**

- The Outlook folder will now be added to the Check In Style form – Click **OK**

Link Outlook Folder(s) to Check In Style

| Add | Remove |

Upgrade CM9:Outlook

| OK | Cancel |
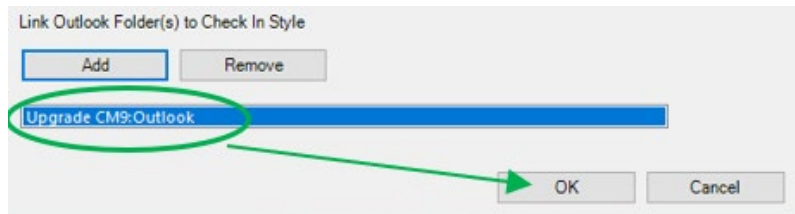
Simply drag and drop an email into the linked folder to save the record to TRIM!