

Table of Contents:

Predictive Text	pg.1
Pressing ENTER to save a document	pg.2
PDF Rendering	pg.4
Outlook – Open Record	pg.5
Outlook – Check In Styles & Linked Folder	pg.6
Create a Check In Style	pg.6
 Check an email into TRIM using a Check In Style 	pg.8
Link an Outlook Folder to TRIM	pg.8

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

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



Click the User Interface tab and select Enable predictive mode on title field

Content Manager options	ŝ	×
٩	Use a custom skin	
Locale	Set skin colour	
User Interface Spelling	Set Skill Colour	
Search	Reset skin colour	
Search Results	Apply search filter when showing child rows in user interface	
Viewer		
Document Store Cad	Double Click Style for documents in Content Manager Desktop Edit	
Email	Edit	~
Startup Reporter	Double Click Style for documents in Content Manager	
Documents	View	~
Dropped Folders	Double Click Style for containers	
Dropzone	Navigate to Contents	~
	External Link for record double click	_
1	a Window Spin	
	Enable predictive mode on title field	
	OK Cancel Get Global	Help

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

Customize Ribbon X							
Customize Ribbon Customize Ribbon Customize Quick Access Toolbar Customize the ribbon and keyboard shortcuts Choose commands from: Commands on Tabs Actions Active Audit Events Activities Activities Activities	Customize Shortcut Bar Customize the ribbon: All Tabs						
Activity Log Activity Log Add Notes Add To Additional Field Additional Fields Additional Fields Alerts All Locations All Parts Archiving Event	Add -> E Search Image: Search Image: Search Image: Search Image: Search Image: Ima						
Keyboard shortcuts:	New Tab New Group Rename Customizations: Reset -						

• Select the following Categories and Commands:

Customize Keyboard				
Categories:		Commands:		
TOOLBAR RGS SEARCH	^	Run Search Run SQL Command SAP Metadata	^	
Graduate Research (Custom) VIEW MANAGE		Save Save and Clear Save As	_	
ADMINISTRATION Commands on Tabs		Save As Save as Draft		
Commands on Tabs	~	Save as Draft	*	

- 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:

•

Categories: TOOLBAR RGS	Commands:	
RGS		
SEARCH Graduate Research (Custom) VIEW MANAGE ADMINISTRATION Commands on Tabs	SAP Metadata Save Save and Clear Save As Save As Save as Draft Save as PDF Save Search As	^
Current Keys:	Press new shortcut key:	
Ctrl+S	Enter	
1	Assigned to:	
Set Adpelerator for:	Press ENTER [Unassigned] here	
Default Description: Save the item currently being edited Assign Remove Re	iset All	
k Close and click OK to confirm custon	nisation NOTE - This only command will only command will only to documents, 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.

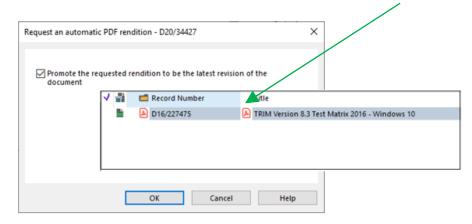
A user will likely create a PDF Rendition of a document:

- 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

- 🔁 🗸	HOME	SEARC	н v	IEW		\sim										
New F	Properties E	xplorer	View		_	Create PDF	aba Add	Relate	Request	Make	Make	AII	Send To	Make	Send Via	Send To
•	File			D	ocument	Rendition	Notes	Records	 Records	Supercopy nands	Final	Parts	Favorites		Email end	Recycle Bin

(Alternatively, right-click on the document select Electronic \rightarrow Rendering Requests \rightarrow 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.

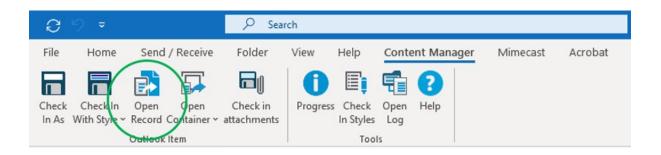


Note – once a record has had a PDF rendition requested it can not be reversed. However, TRIM9 will create the PDF as a new revision. Review the <u>Revisions and version control in TRIM Quick Reference</u> <u>Guide</u> to learn how to locate the original version of the document and promote it back to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

\in	• Untick Use the record Properties dialogue when opening a record
	Click OK
Info	
Open & Export	Content Manager Integration Options ? ×
Save As	Language English (United States)
Save as Adobe PDF	Use Web Client (enter Web Client URL)
Save Attachments	Diagnostic Logging
Print	Use the record Properties dialog when opening a record
2	For non mail Outlook items, e.g. Notes, create revisions for subsequent check-ins
Office	My Documents folder (blank to use default)
Account	
Feedback	OK Cancel
Content Manager Options	
Options	
Exit	

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.



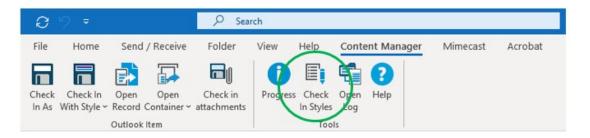
In addition, a previously created Check In Style can be linked to an Outlook Folder. Once linked, the user can drag and drop an email into the linked Outlook folder and automatically register the email into TRIM without needing to manually select the Check In Style each time. This method enables users

to choose to completely bypass the TRIM data entry form for efficiency.

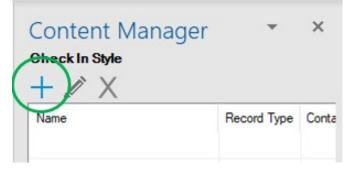
This feature is useful when registering multiple records into TRIM that contain matching criteria in ALL fields e.g. all records contain the same record type, same author **AND** are registered to the same container.

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

🔁 Check In Style		? ×
Name		
TRIM9 Upgrade Project		
Record Type		
EMAIL		~ 🛋
Container		
14/1481/12		\sim
Alternate Container		
		~ 🛋
Addressee		
		~ 🛋
Set Default Author Option		
No Default		~
Specific Author		
		\sim
Show check in dialog		
Delete after check in		
Only catalog the attachments of email messages		
Link Outlook Folder(s) to Check In Style		
Add Remove		
UPGRADE EMAILS:Outlook		
	ОК	Cancel

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

C 7 °	♀ Search
File Home Send / Receive Check In As With Style ~ Record Container ~ Select Record Type TRIM9 Upgrade Project	Folder View Help <u>Content Manager</u> Mimecast Acrobat
Confirm details and click OK to save	New EMAIL General Notes Title (Free Text Part) Kapisch - CM9 RM Importer - Integration Yation Container 1/1481/12 Image: Container Alternative container OK Cancel Help

Link an Outlook Folder to TRIM via a Check In Style

• Open Outlook – Select Check In Styles from the Content Manager tab

Check Check In Open Open Check in Progress Che In As With Style × Record Container × attachments	
Outlook Item	Tools

 Highlight the Check In Style you want to link to the Outlook folder – Click the Edit Check In Style button (pencil)

Content Manager	~	×
Check In Style		
+ 🗸 X		
Name	Record Type	Conta
E TRIM9 Upgrade Project	EMAIL	TRIM

- Link Outlook Folder(s) to Check In Style At the bottom of the Check Add • In Style 'properties' form click Add ОК Cancel \times Select Folder Folders: Integration Documents OK ^ Security Compliance Testing SharePoint Cancel • Highlight the required Outlook folder TechnologyOne TRIM Assessment New... • Click OK Upgrade CM9 Drafts [1] Personal] RMO Team General TRIM] Usernames/Passwords Archive 🖧 Calendar > < >
- The Outlook folder will now be added to the Check In Style form Click **OK**

Add	Remo			
Add	Remo	ove		
ade CM9:Out	tlook			



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