



## TRIM9 Content Manager

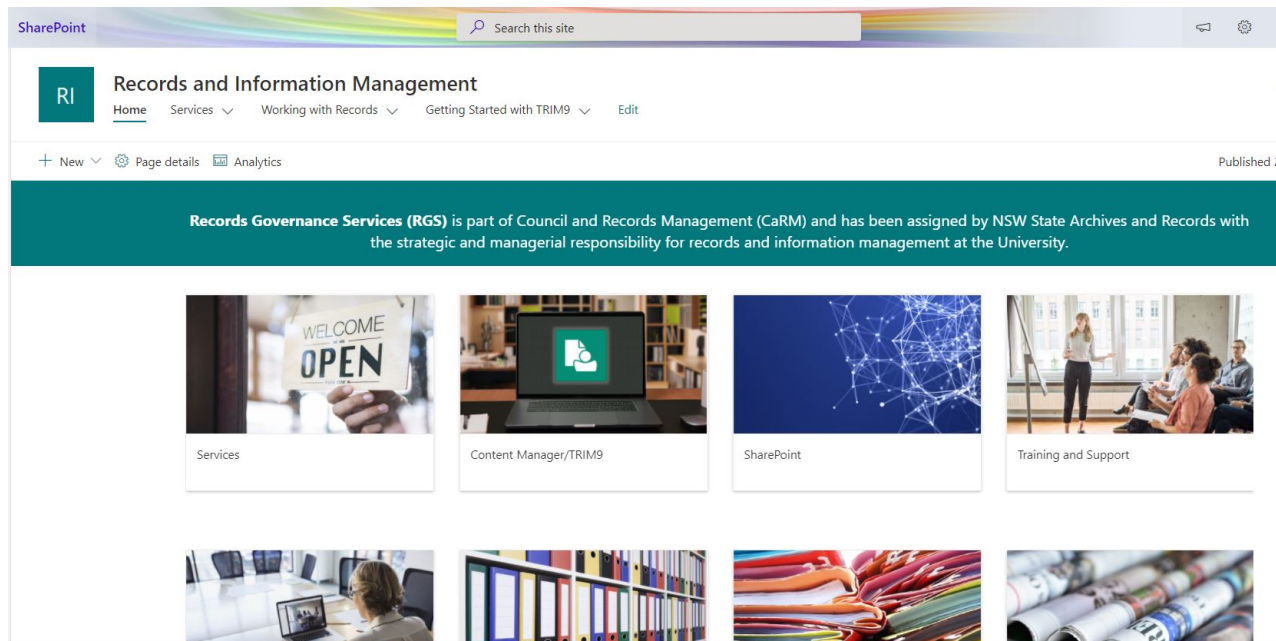
# Tips & Tricks

Research Governance Services (RGS) offers a variety resources to support staff in compliant, effective and efficient record keeping. Listed below are the places you can find that support.

### SharePoint - Records and Information Management

(<https://uonstaff.sharepoint.com/sites/Records>)

The [Records and Information Management SharePoint site](#) is a one stop shop for resources related to record keeping, and using TRIM and SharePoint for records management. There are sections on the services offered by RGS, resources for using TRIM and SharePoint (including support for migrating from share drives), guidance about training, procedures and policies and other record keeping resources. Remember to “Follow” the site so that it’s placed in your “Following” list for easy reference.

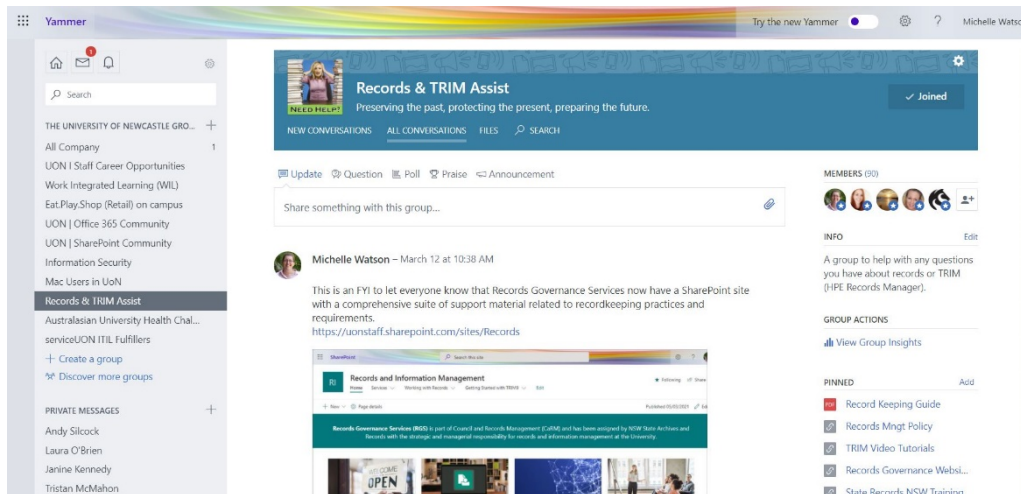


### Yammer - Records & TRIM Assist

([https://www.yammer.com/uonstaff.edu.au/#/threads/inGroup?type=in\\_group&feedId=12866714&view=all](https://www.yammer.com/uonstaff.edu.au/#/threads/inGroup?type=in_group&feedId=12866714&view=all))

Yammer is the integrated bulletin board in the Office 365 environment. The Records Governance Team use our Yammer site to post quick updates about service changes or interruptions, news stories related to record keeping and records management, advice about upcoming training or any other events that require quick communication with TRIM users. It's also a great space for users to ask questions and get advice.

Yammer is an opt in service, so search for “Records & TRIM Assist”, and then “Join” to receive notifications from the group and have the group appear in your membership list.



## TRIM Reference Guides

(<https://www.newcastle.edu.au/current-staff/our-organisation/governance/legislation-and-compliance/records-governance/training-and-support>)

These are detailed guides on how to do specific tasks in TRIM such as auto-filing emails into TRIM, searching, security and access controls, action tracking and workflows and much more.

**Quick Reference Guide – TRIM9 / Microsoft Outlook Integration**

**TRIM9 Outlook Ribbon Buttons**

TRIM9 Outlook Integration adds the TRIM9 ribbon to Microsoft Outlook, which enables you to check in email, open email records and manage 'Check In Styles'.

RIBBON BUTTON	FUNCTION
	Check selected Outlook item(s) into TRIM9 using the default style or using a record type
	Select a style or record type to use to check the selected Outlook item(s) into TRIM9
	Open an Outlook item that has already been checked into TRIM9
	On a Linked Outlook folder, click to open the linked container or classification
	Check in the Outlook item(s) attachments
	Click to turn on or off the Progress bar. This allows you to monitor the progress of the check in processes
	Click to turn on or off the Check In Styles panel. This allows you to view, create and modify Check In Styles, Linked Folders and default Check In Style settings to be used when checking mail items into TRIM9
	Click to open the generated log file
	Click to open the help file

**Check an email into TRIM**

There are two methods to check an Outlook email into TRIM:

**Drag and Drop**

This method allows you to drag an email from Outlook and drop it directly into TRIM9 to be checked in

1. Open TRIM9 and locate the container the email will be checked in to
2. Open Outlook, select the required email, drag across to TRIM9 and release on top of the previously located container
3. Select the required record type (Email) and click OK

4. Proceed to populate the Email Check In (registration) form, click OK

**Check In As**

This method utilises the **Check In As** button on the TRIM9 Ribbon in Outlook

1. Open Outlook, select the email that is required to be checked into TRIM9
2. Click the TRIM9 (CM9) tab on the Outlook ribbon and select **Check In As**

3. Follow steps 3 and 4 above to complete

## TRIM9 Video Tutorials

(<https://www.newcastle.edu.au/current-staff/our-organisation/governance/legislation-and-compliance/records-governance/trim-video-tutorials>)

Short video tutorials on how to do some of the most common activities within TRIM, such as applying global settings, creating folders, and many more.

### TRIM9 Tips

 [# 1 - Applying 'Global Settings'](#) 1:44 mins

 [# 2 - Re-applying TRIM / MS Outlook Integration](#) 2:13 mins

 [# 3 - Creating an Electronic Folder](#) 2:16 mins

## Discover Training Modules

(<https://discover.newcastle.edu.au/course/view.php?id=376>)

We offer a number of training options in Discover. Available courses include self-paced modules related to basic record keeping concepts and requirements, email management and the process for disposing/destroying records.

In addition, you can also organize one on one TRIM training.

My courses / [Records Management and Recordkeeping Training \(Online\)](#)



If you are interested in any of these resources, or have any questions, please get in contact with the Records Governance Services team via email ([records@newcastle.edu.au](mailto:records@newcastle.edu.au)), phone (x17054), or via Yammer or SharePoint.