

USER LABELS

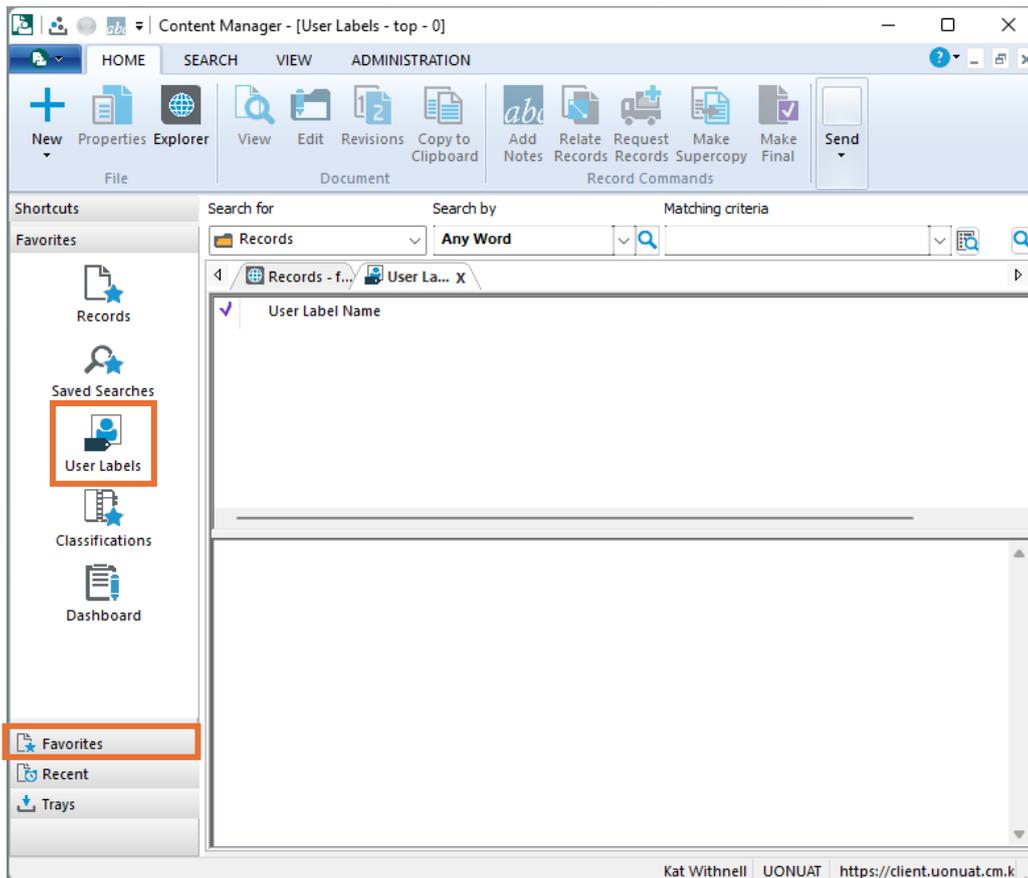
User Labels are a great way to organise and group your records!

TRIM allows you to create your own personalised user labels and apply them to records. This enables you to create a structure for locating and accessing your records that is unique to you. Essentially, you are creating a private shortcut to your records that will eliminate the need to repeatedly perform searches. Each user label can have multiple sublevels and there is no limit to the number of labels that can be created.

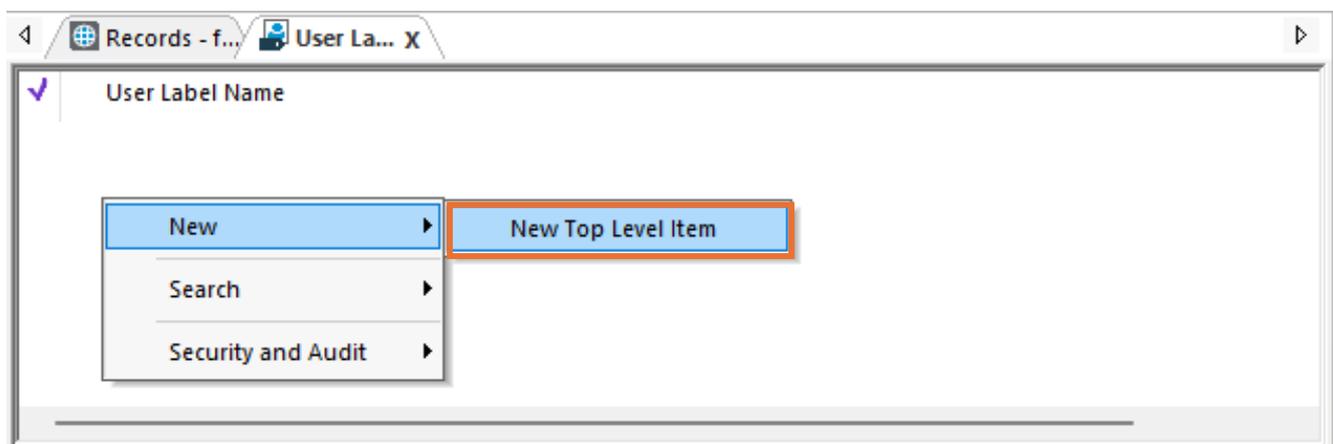
For example, you may create user labels to manage both 'business as usual' tasks or specific projects.

CREATING A USER LABEL

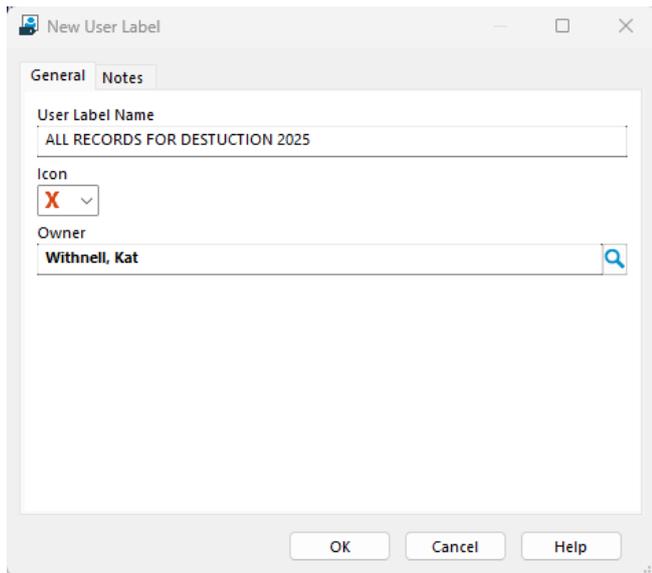
1. In TRIM, navigate to **Favourites** in the **Shortcut Pane** and select **User Labels**:



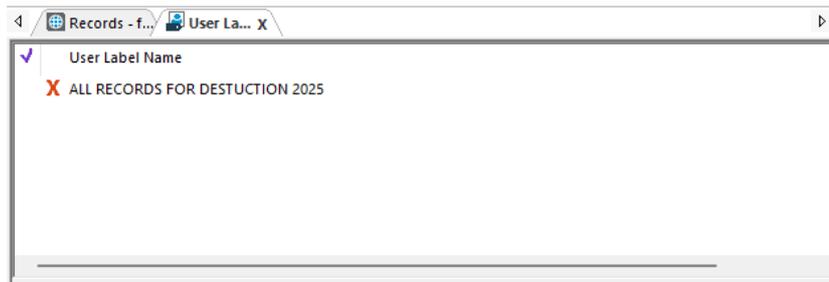
2. From the **List Pane**, right-click and select **New** and **New Top Level Item**:



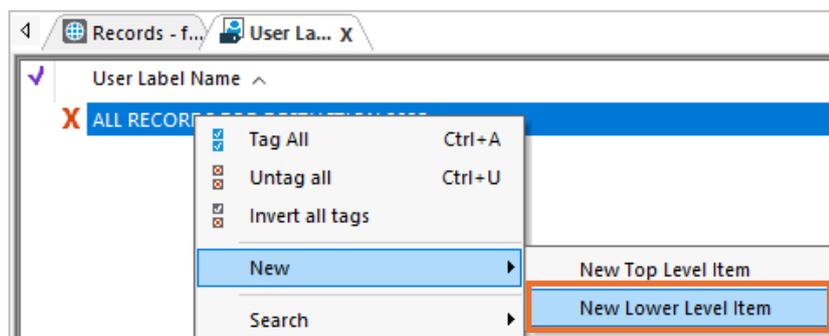
3. This will open the **New User Label** window. From here, you can enter your **User Label Name**, choose an **Icon**, as well as set the **Owner**. Once all details have been entered, click OK to create the **User Label**:



4. Your new **User Label** will be displayed in the **List Pane**:



5. You can continue to create **New Top Level Items** or **New Lower Level Items** as shown below, by right-clicking on your **User Label**, selecting **New** and either **New Top Level Item** or **New Lower Level Item**:

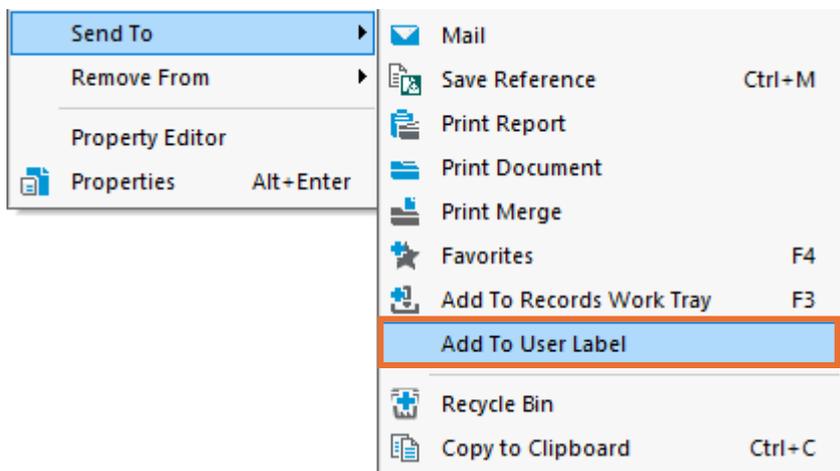


6. Then, follow step 3 as many times as required, and your newly created Top or Lower Level Item will display in the **List Pane**:

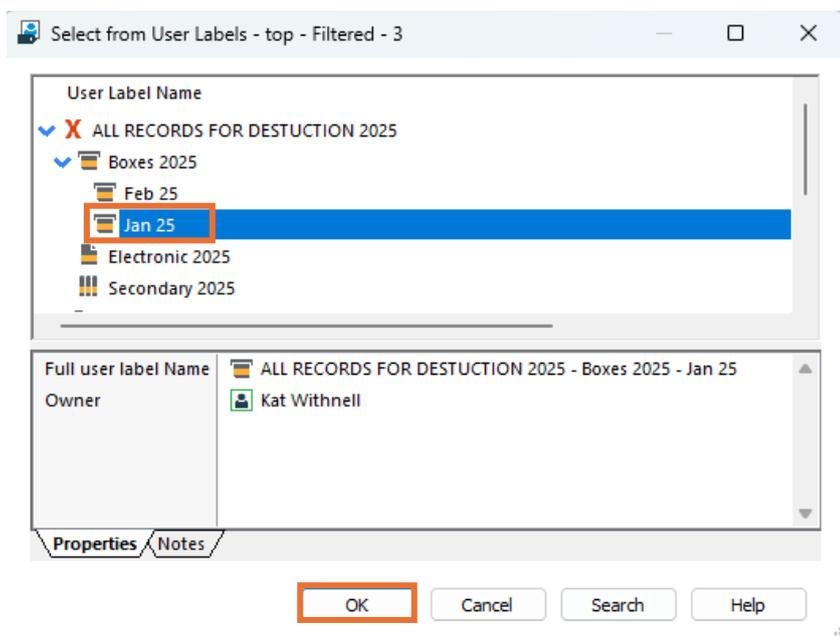


SEND RECORDS TO USER LABELS

1. Locate the record(s) required
2. Tag the record(s) you want to send to the label
3. Right-click > Send To > Add to User Label



4. From the list provided, select the appropriate Label > Click OK

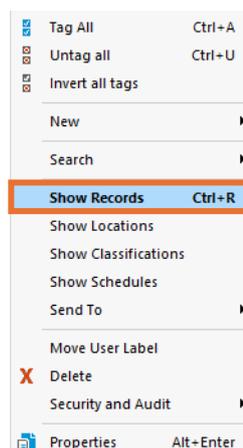


NOTE: You can keep adding as many records as you'd like to the User Label, at any time. You can remove a record from a User Label by right-clicking on the record → **Remove From** → **Remove from User Label**.

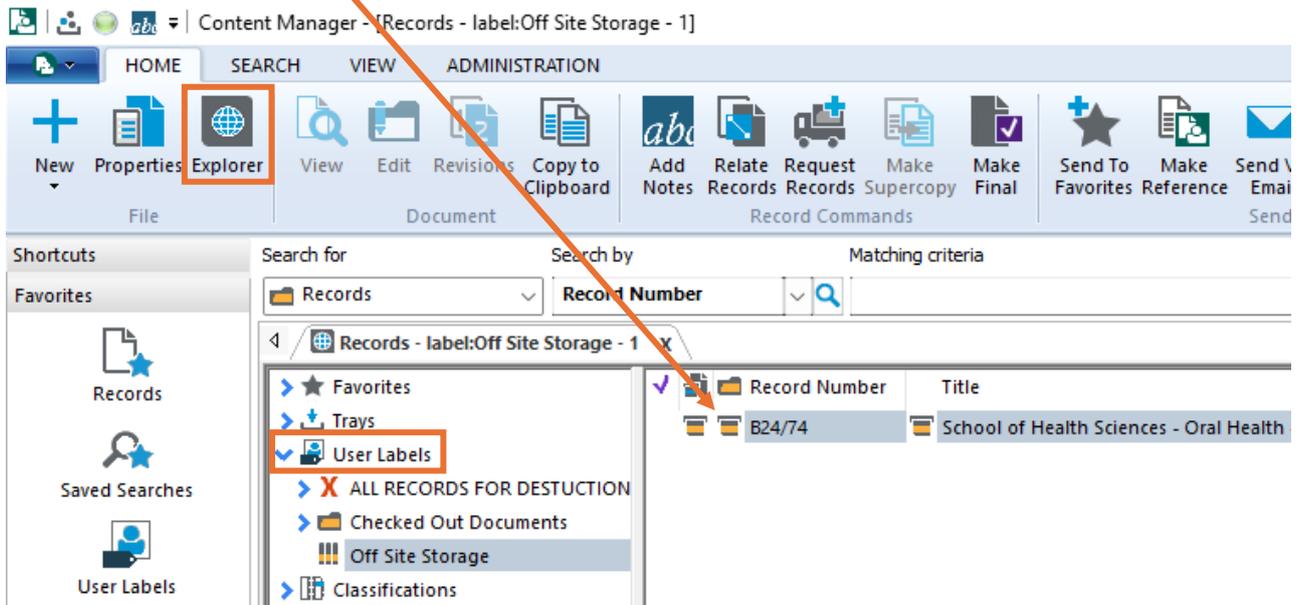
ACCESS RECORDS VIA USER LABELS

To view the records you have attached to your user label:

1. Navigate to your new User Labels (Shortcut Panel > Favourites > User Labels)
2. You can either
 - a. Double-click on the required User Label; or
 - b. Right-click on the User Label > Show Records
3. This will open a new tab in TRIM which will show you a list of all the records that you have sent to that user label



User Labels are also accessible via the Explorer Window. The records you have sent to that User Label will be displayed in the window on the right



MODIFY A USER LABEL

To modify the title or the icon of the User Label:

1. Right-click on the User Label > Properties

REMOVE A USER LABEL

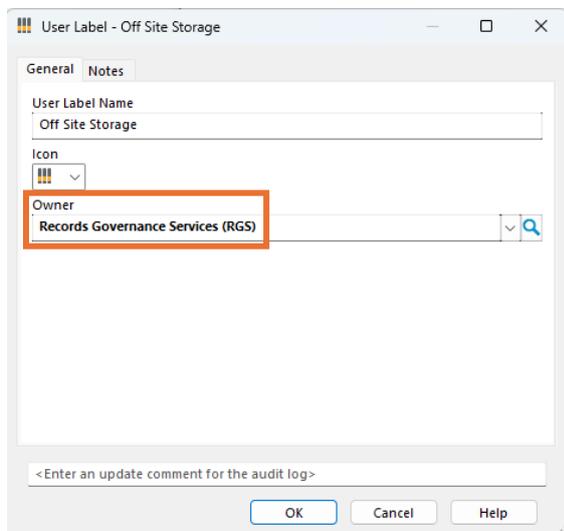
When you no longer require a User Label:

1. Right-click on the User Label > Delete

SHARING A USER LABEL

To share a User Label:

1. Right-click on the User Label > Properties
2. In the **Owner** field, click the spy glass
3. Search for the Group/Organisation you want to share the User Label with, click to highlight the row and then click **OK**. The **Owner** field will now show the Group/Organisation location:



NOTE: Sharing a user label with a Group/Organisation type location will make it accessible by all users who are members of that location (and are a part of the required Access Controls).

4. Click **OK** to close the window