## Introducing TRIM - Content Manager

TRIM - Content Manager is the University's electronic document and records management system (EDRMS) which manages records in different formats. Its purpose is to capture, manage, secure and dispose information easily and efficiently, and in line with regulatory compliance obligations. TRIM - Content Manager supports the University's business processes through information sharing and tracking. It also provides a more robust, reliable and transparent process for saving documents and files than saving them locally or on unsupported devices.

## How to get access to TRIM

Please complete the TRIM Access Application form (pdf.). Send the completed form to records@newcastle.edu.au for processing.

## How to get TRIM installed on your computer

For new TRIM users, the Records Governance Services team will organise for TRIM to be installed on your computer as part of setting up your TRIM access.

If you are a current TRIM user and require TRIM to be installed on an additional computer, you can contact the IT Service Desk directly to request this.

## Getting Started

Open TRIM by double clicking the **TRIM (Content Manager)** icon on your desktop.

If the **TRIM (Content Manager)** icon isn't on your desktop, you can locate it by clicking on the Windows **Start** button at the bottom left of your computer screen and navigating to the **TRIM (Content Manager)** folder.

If you are working off campus, prior to accessing TRIM, please ensure that you are connected through the **Global Protect VPN**, which should already be installed on your UON computer.

Digital Technology Solutions (DTS), can be contacted on 492 x17000, should you require assistance with Global Protect.
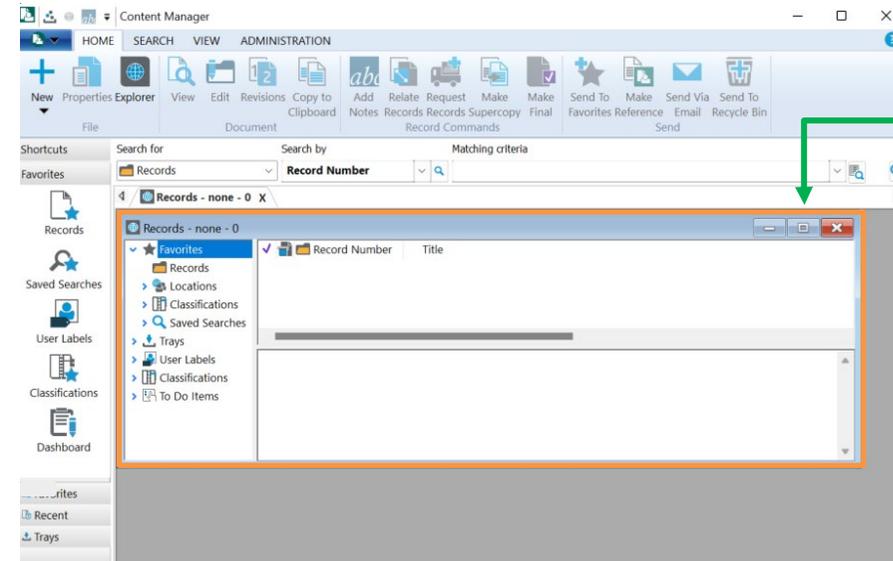
## Support

**Records Governance Services**

Phone: 492 15306

Email: records@newcastle.edu.au

## How to maximise TRIM windows

When you open TRIM, your TRIM windows will not be maximised, meaning each window won't be using the maximum space it can:



**Hint:** It is recommended to click the **Maximise** button



on the current window to increase the size of your TRIM windows, meaning when navigating and working within TRIM the information on screen will have more space to display within. When you use the **Maximise** button, the change will apply to any window you currently have open, and any new windows you open during your current TRIM session.
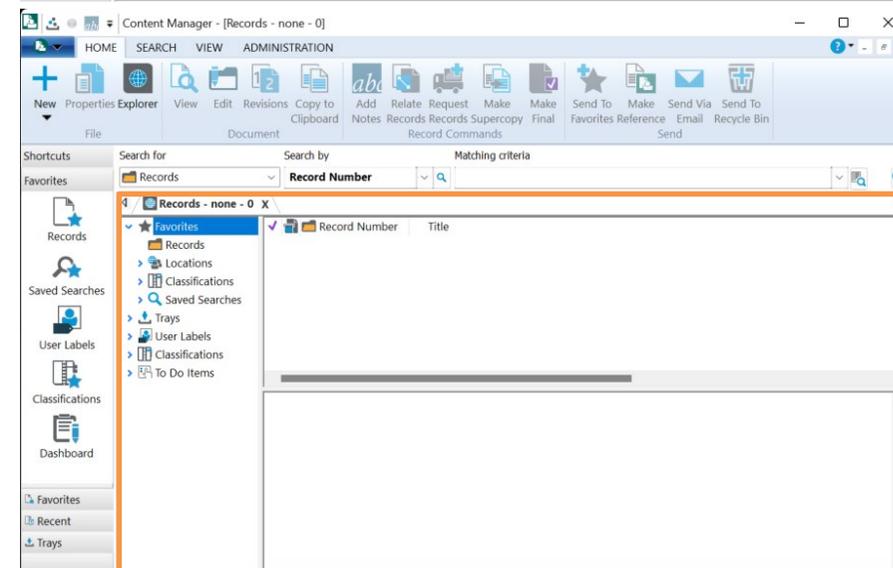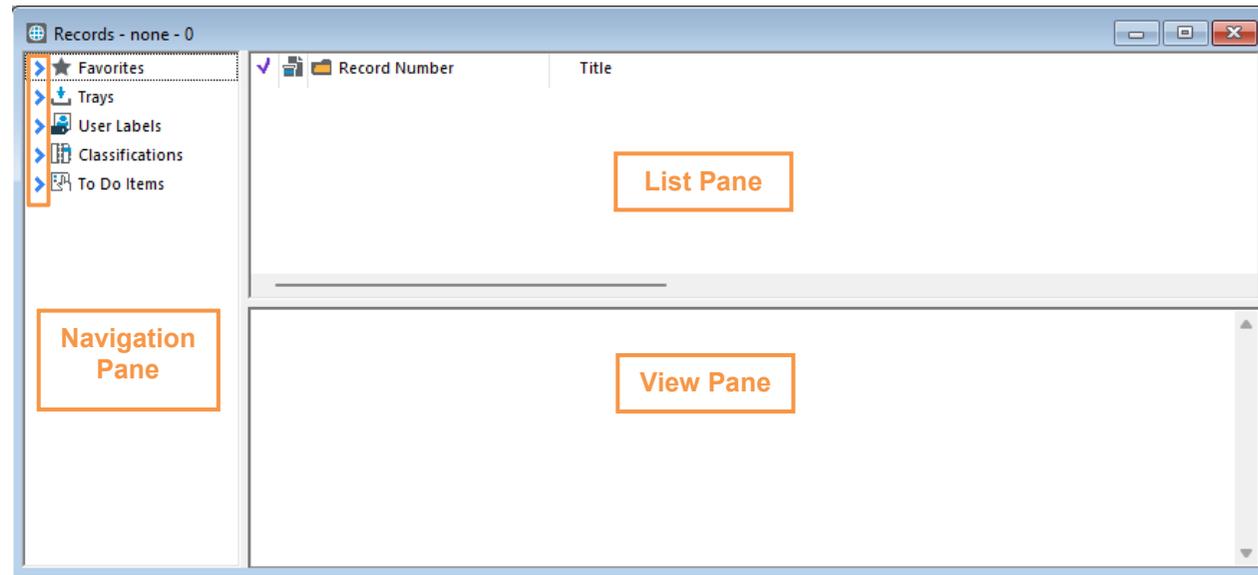
## TRIM Explorer

When you open TRIM, you will be presented with the **Explorer** window. Explorer gives you a hierarchical view of records, locations and items grouped within different shortcuts and item types.

The **Explorer** window consists of three panes:

**Navigation Pane** – Displays and allows you to navigate the hierarchical structure. Use the right-facing blue chevron ❯ to the left of an item in the Navigation Pane to display its contents. Use the down-facing blue chevron ❯ to the left of an item to hide the contents of that item.

**List Pane** – Lists all the records, items and locations associated with the currently selected option in the Navigation Pane.

**View Pane** – Displays information about the record which is currently selected in the List Pane.



You can return to the **Explorer** window at any time by selecting the **HOME** tab, then clicking the **Explorer** button:
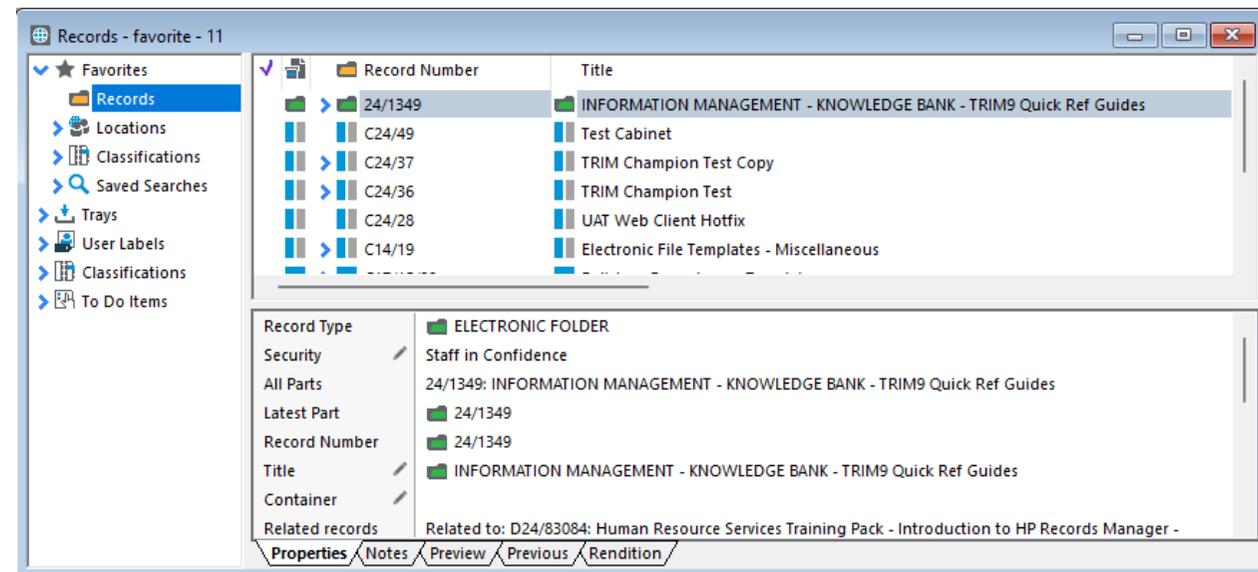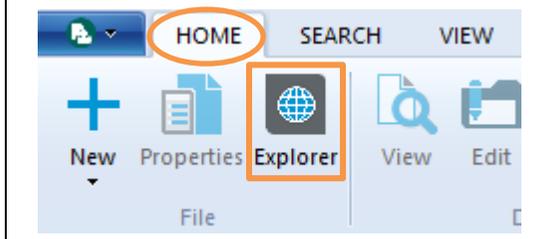
## Understanding the TRIM Screen

The TRIM screen is divided into eleven sections:

- **File Button** – Area where TRIM options and integrations can be configured
- **Menu Tabs** – When selected will each display different buttons according to their title
- **Toolbar/Ribbon** – Series of icons/buttons that link to TRIM functions
- **Quick Search Area** – Perform simple searches with one field at a time
- **Tab Bar** – Quick link to all the windows you currently have open
- **List Pane** – Lists all your records and locations as a result of your search (search results)
- **View Pane –** Displays information about the currently selected record (information displayed is dependent on which **Quick View tab** is selected)

- **Status Bar –** Shows the logged-in user, the TRIM dataset name, and the server name
- **Quick View Tabs –** View properties (metadata) of selected record, view notes attached to the selected record, preview the current revision of the selected record, and view the previous revision of the selected record
- **Shortcuts Pane –** View frequently accessed records, folders and locations
- **Tag –** Allows you to select (tag) multiple items and apply the same function to them. E.g. tag certain records and move them from one container to another at the same time
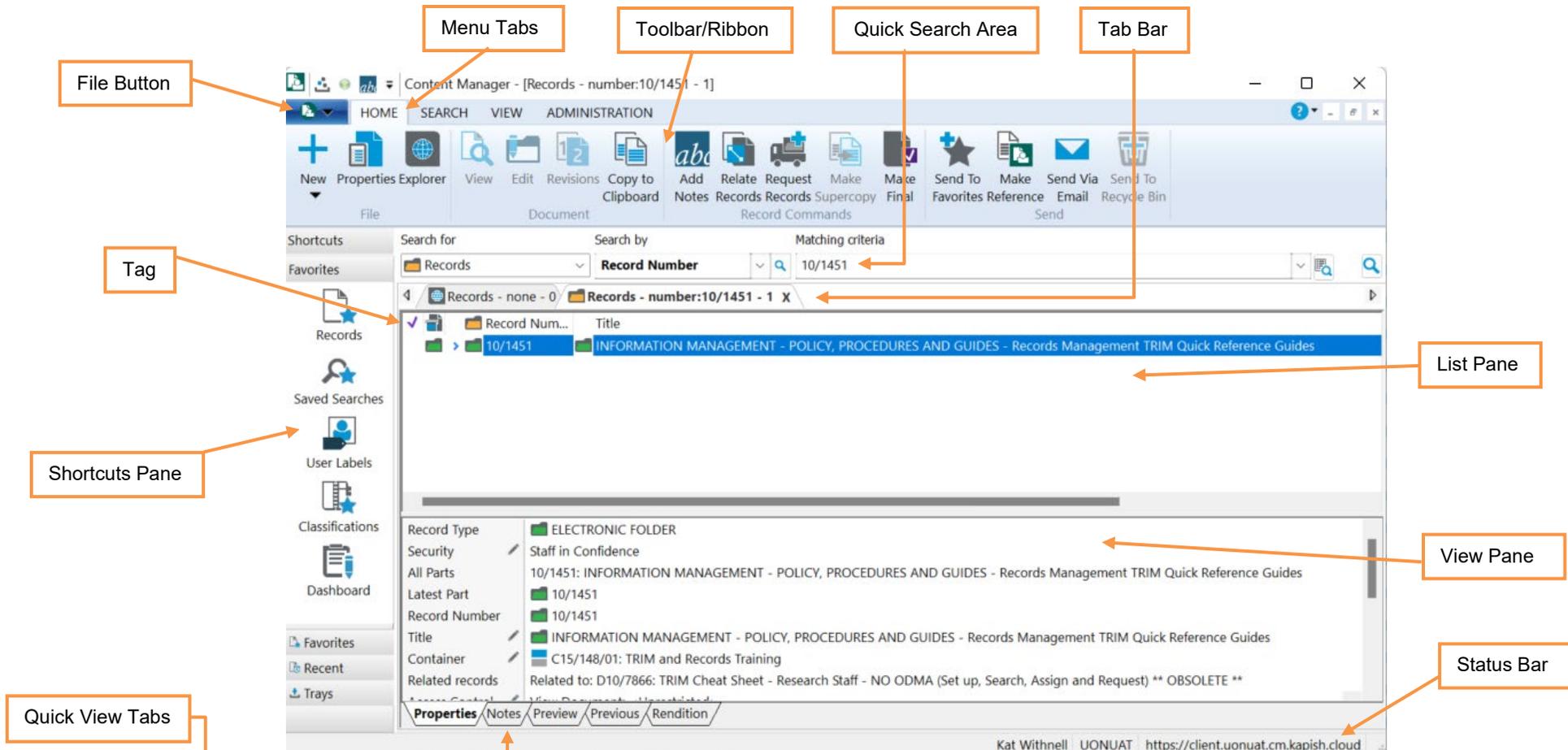
## Quick view
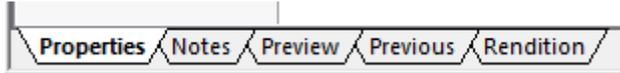


**Properties** – View information about the selected record (metadata)

**Notes** – View the notes of the selected record

**Preview** – Preview the current revision of the selected record

**Previous** – Preview the previous revision of the selected record

**Rendition** – Preview the most recently added rendition of the selected record

## View Pane

When a document is selected in the **List Pane**, information about the record (metadata) will be displayed in the **View Pane**, as demonstrated below:



**Note:** Different record types will display different metadata fields in the **View Pane**.

## Edit status

The **Edit Status** of a document appears in the **View Pane** (refer screenshot below left).

If the **Edit Status** field shows **Checked In** it means the record is available for editing.

If the **Edit Status** field shows **Checked Out** it means someone already has the record open for editing, and you will have to wait until they have finished editing and saved their changes back into TRIM before you can open and edit the document.

If the **Edit Status** field shows **Finalized** it means the record is final and no changes/edits can be made.

**Note:** Although you can't edit a record that is finalized or checked out, you can still view it.

## Checked Out To & Checked Out On

If a record is currently checked out, the **Checked Out To** field (directly below **Edit Status** in the **View Pane**) will tell you who has the record checked out. The **Checked Out On** field will tell you when the record was checked out.



## Revision number

When you view a record from the **List Pane** in TRIM you are viewing the current revision. You can see how many revisions a record has by checking the number listed next to **Revision Number** in the **View Pane** (refer left). Every time a record is updated a new revision is saved over the top of the previous revision, and the Revision Number increases by one.

**Hint:** To view previous revisions for a record, click the **HOME** tab then select the **Revisions** button:
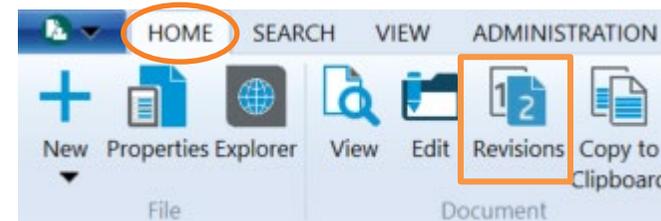
## Shortcuts Pane

The **Shortcuts Pane** is comprised of three tabs, **Favorites**, **Recent** and **Trays**. At the bottom left of the TRIM screen is where you can select between these three tabs:
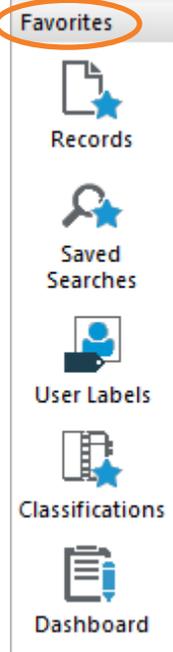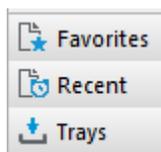
### Favorites

Provides a shortcut to your favourite /regularly used records and saved searches.

To send an item to your Favorite Records or Favorite Saved Searches, right-click on the item in the **List Pane** → **Send To** → **Favorites** (alternatively you can click on an item once, then select the **HOME** tab at the top left of the TRIM screen and then select the **Send To Favorites** button in the Toolbar:

To remove an item from your Favorites, right-click on the item in the **List Pane** → **Remove From** → **Remove from Favorites**

The TRIM **Dashboard** allows you to access a pre-defined breakdown of outstanding work tasks including a total number of items and a breakdown of tasks within set time periods. Dashboard is particularly useful if you are involved in any TRIM Workflow or Action Tracking processes.

You can double-click directly on the **count numbers** to easily navigate to those particular records in TRIM:
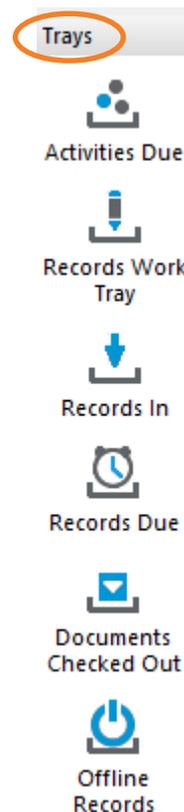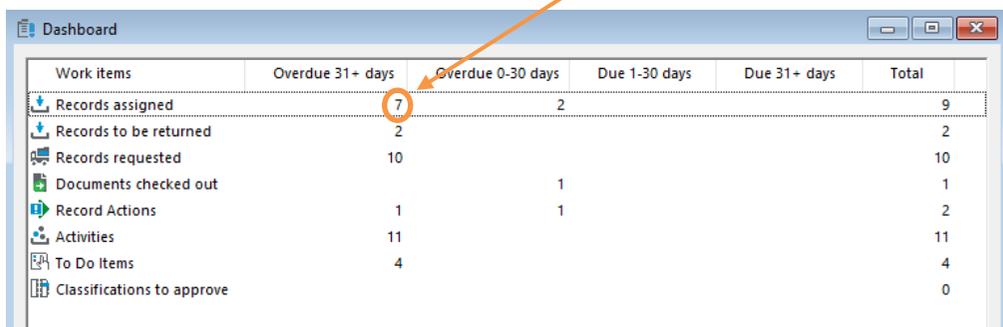
### Trays

A couple of helpful categories within the **Trays** Shortcut are **Records Work Tray** and **Dashboard**.
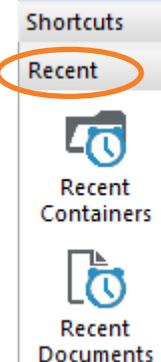
Think of **Records Work Tray** as like a temporary Favorites. Any open matter/file/case etc. can be stored here until you have finished with it.

To place a record in your Records Work Tray, in the List Pane right-click point to **Send To** → **Add To Records Work Tray** (alternatively you can click once on the item and press **F3** on the keyboard).

To remove an item from your Records Work Tray, in the List Pane right-click point to **Remove From** → **Remove Record from Records Work Tray**

### Recent

**Recent** has two options:
- Recent Containers
- Recent Documents

**Recent Containers** is automatically populated with the 25 most recent containers you create or add a record to.

**Recent Documents** is automatically populated with the 25 most recent documents you create or edit.

| Work items | Overdue 31+ days | Overdue 0-30 days | Due 1-30 days | Due 31+ days | Total |
|---|---|---|---|---|---|
| Records assigned | | 7 | 2 | | 9 |
| Records to be returned | 2 | | | | 2 |
| Records requested | 10 | | | | 10 |
| Documents checked out | | | 1 | | 1 |
| Record Actions | 1 | 1 | | | 2 |
| Activities | 11 | | | | 11 |
| To Do Items | 4 | | | | 4 |
| Classifications to approve | | | | | 0 |

## Toolbar/ribbon and navigation tips

The Toolbar comprises three default tabs; **HOME**, **SEARCH** and **VIEW**. Clicking on a tab once will display its buttons:
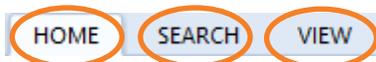


**HOME** tab
Includes all primary functions you might perform on a selected record:



**SEARCH** tab
Includes all searching functions and navigational tasks related to searching:



**VIEW** tab:
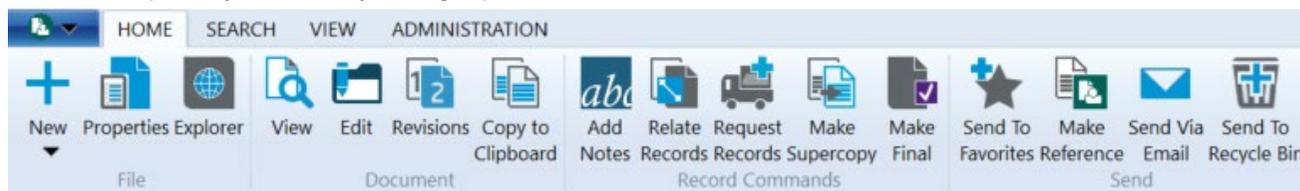


**Hint:** As an alternative to the Level Up and Level Down buttons when navigating; the blue chevrons to the left of a record will hide and display its contents (but **doesn't open a new window**). This therefore allows you to view records and navigate hierarchical structures with context. Use the blue chevron to the left of a record to display its contents. Click it again to hide its contents.

**Hint:** The **Level Up** and **Level Down** buttons on the **SEARCH** tab are a very useful tool for navigating TRIM.

**Level Up** – Displays the container that the selected record is in. E.g. if you currently have a document selected, clicking **Level Up** will **open a new window** and display the folder or sub-folder that document is in.

**Level Down** – Displays the contents of the selected container. E.g. if you currently have a folder selected, clicking **Level Down** will **open a new window** and display the contents of that folder.
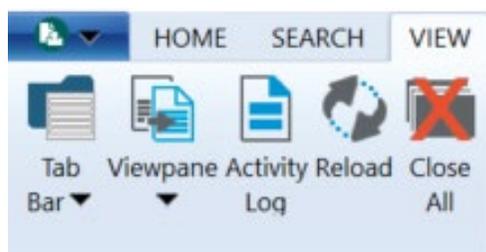
**Hint:**

**Tab Bar** – Allows you to choose whether to display the **Tab Bar** at the top or bottom of the screen. Also allows you to choose how you want to navigate through the open tabs when the page limit of tabs is reached (E.g. **Top** will use forward and back buttons, whereas **Top with menu** utilises a drop-down list).

**Viewpane** – Allows you to choose if you would like to display the **View Pane** at the bottom (default) or right of the screen.

**Close All** – Closes all windows you currently have open.