

Introduction

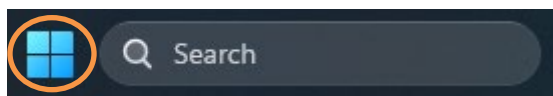
The purpose of this guide is to detail how to save and manage Oral Examination (VIVA) records in TRIM. For additional information/guidance on VIVAs please refer to the [Oral Examination \(VIVA\) Procedure](#).

Records Governance Services (RGS) recommends using Zoom to record VIVAs as this will save your recording in MP4 format which is open source and has a high amount of compression, meaning reliable access to these records into the future and smaller file sizes.

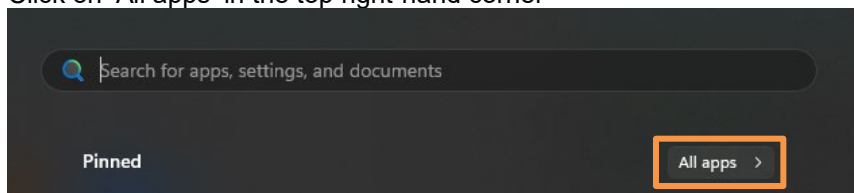
The instructions on page 1 to 3 of this guide primarily pertain to the staff who will be conducting and recording the VIVAs. The arrangement for this may change from School to School, for example, some Schools may have the academics / course coordinators schedule and conduct the VIVAs, whilst other Schools may choose to have administrative staff schedule the VIVA meetings on behalf of the academic staff. This second arrangement would allow administrative staff to pre-set the required Zoom meeting settings such as video turned on by default and automatic recording of the meeting to the Cloud.

Recording VIVAs using Zoom

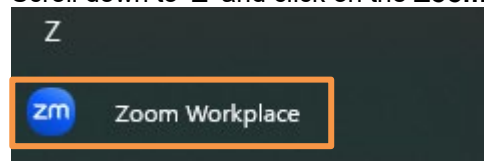
1. Click on the Windows **Start** button:



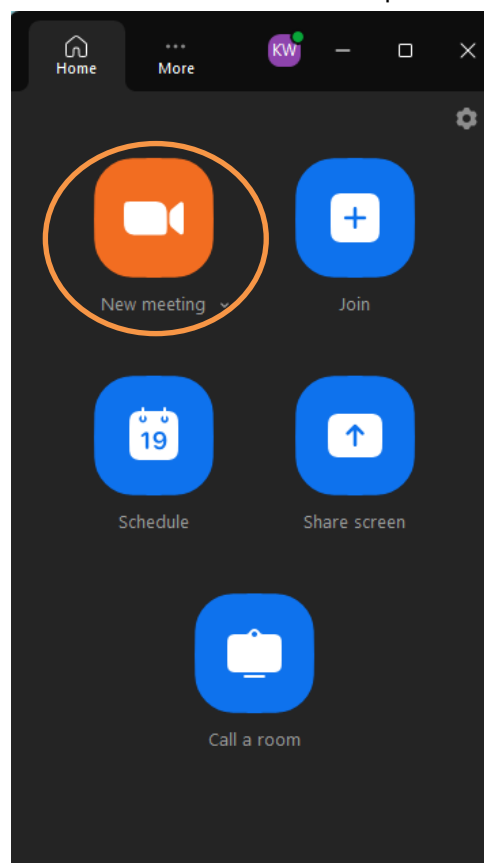
2. Click on 'All apps' in the top right-hand corner



3. Scroll down to 'Z' and click on the **Zoom** application



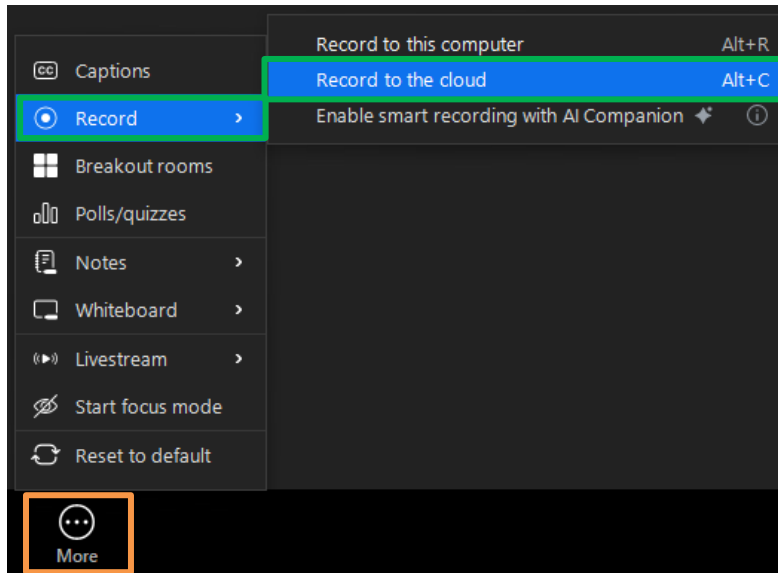
4. The below 'Zoom' window will open. Select the **New Meeting camera icon**:



- When you are ready to begin the recording, ensure video is turned on. If not, turn it on by clicking the **Start Video** button at the bottom of the 'Zoom Meeting' window, and ensure the camera is facing the student:



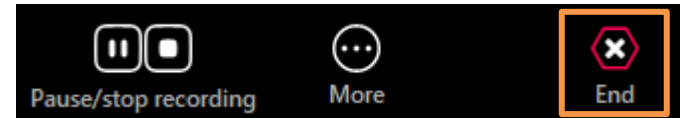
- Click **More** at the bottom of the 'Zoom Meeting' window and select **Record**. Select **Record to Cloud** to save the recording to the Cloud, and you can then commence the VIVA:



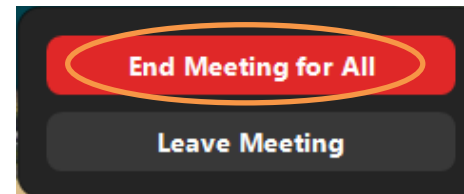
Note:

- The recording will save to the Zoom Cloud, and you will receive an email shortly after the meeting is ended containing links to the recording of the meeting in the Cloud.

- Once the VIVA is complete, click the **End** button at the bottom right of the 'Zoom Meeting' window:



- Click **End Meeting for All**:



Accessing / Sharing and Downloading the Recording

- The next step is to ensure the recording is available to the staff member(s) who are required to save it to TRIM. Depending on your School's local processes this step may differ from School to School.

As mentioned in the previous section at Step 7, the recording should be saved to the Cloud, and shortly after the meeting has ended the meeting organiser will receive an email from Zoom which contains links to the recording of the meeting in the Cloud. If the recipient of this email isn't the person responsible for putting the VIVA recording into TRIM then the email will need to be forwarded onto the appropriate staff who have responsibility for this task.

- Click on the appropriate link in the email (if you were the meeting host click on the **first link**, if the email has been shared with you click on the **second link**):

For host only, click here to view your recording (Viewers cannot access this page):
https://uonewcastle.zoom.us/recording/detail?meeting_id=8yeeZdxIQ%2B0Ix4XBSQ1gGg%3D%3D

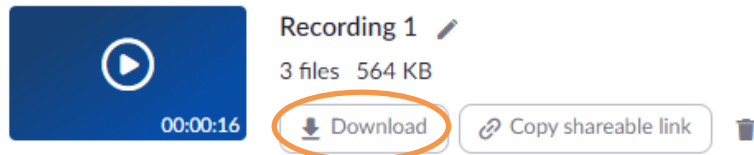
Share recording with viewers:
https://uonewcastle.zoom.us/rec/share/eh7Gyn_R_tBbMtOGNZtmyXNB2tuSweahWBhL29FL-6fJTn1fAL62-fbyVs3W_Yb.zeOHwM0-hWuC1OKc Passcode: 79h^J52z

- You may need to type in the meeting passcode which you will find contained within the email.

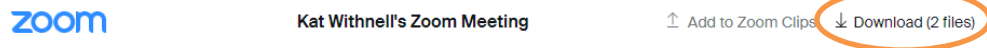
Note: Zoom sessions scheduled for recording from your Canvas Course Site will be available in your Site's Panopto folder and not the Zoom Cloud.

- Next, you need to download the recording to your computer using the **Download** button. The **Download** button will appear differently depending on whether you were the meeting host, or the email has been shared with you:

For the meeting host, it should look like this:



If the email has been shared with you it should look like this:



Note:

- Each recording will contain three files:
 - MP4 video and audio file
 - M4A audio only file
 - VTT text transcript file

The MP4 file is the only file that needs to be saved to TRIM.

- How you download the file(s) and where they download to will depend on the browser you are using and the settings you have configured.

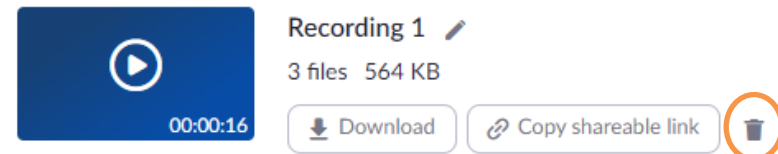
The remainder of this guide details instructions on how to upload the recording and (if applicable) other relevant documents into TRIM.

Note: Once the VIVA recording has been uploaded into TRIM and quality checked to ensure it opens / plays, the recording should be deleted from the Zoom Cloud by the meeting organiser. This is because the recording in TRIM is now the source of truth for the University, so by deleting the recording from the Zoom Cloud we ensure we aren't using up our limited Zoom Cloud storage space by retaining duplicate information, plus we ensure we are not retaining this sensitive information in more than one place which is an important step in ensuring this information is protected from unauthorised access.

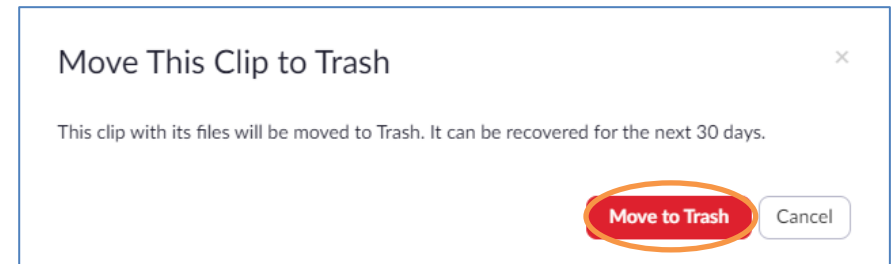
Please ensure your School has the appropriate process in place to ensure this occurs.

To delete your VIVA recording from the Zoom Cloud:

- In the Zoom Cloud, click the **trash can** button next to the recording:



- The below window will display. Select **Move to Trash**:



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 - Content Manager

Information about how to request access to TRIM can be found on the ['ABOUT TRIM'](#) page of the University of Newcastle website.

How to Get TRIM - Content Manager 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

You can open TRIM by double clicking the **TRIM (CM9)** icon on your desktop:



If the **TRIM (CM9)** 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 (CM9)' folder.

Support

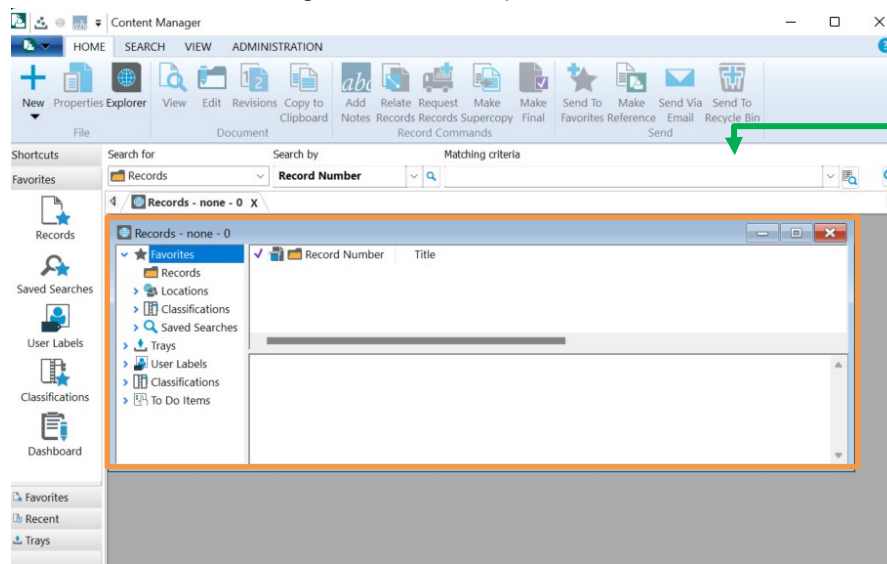
Records Governance Services

Phone: 492 15306

Email: records@newcastle.edu.au

How to Maximise TRIM Windows

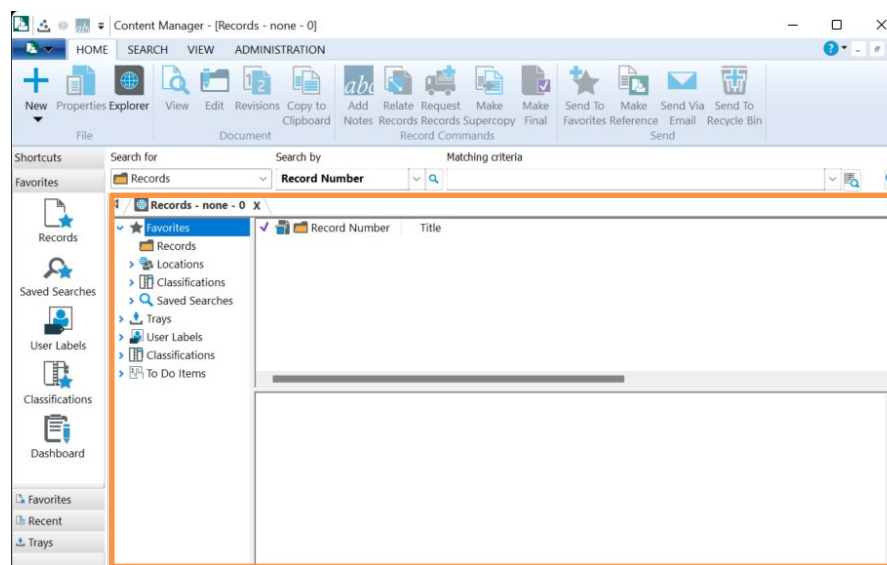
When you open TRIM your TRIM windows will not be maximised, meaning each window won't be using the maximum space it can:



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.

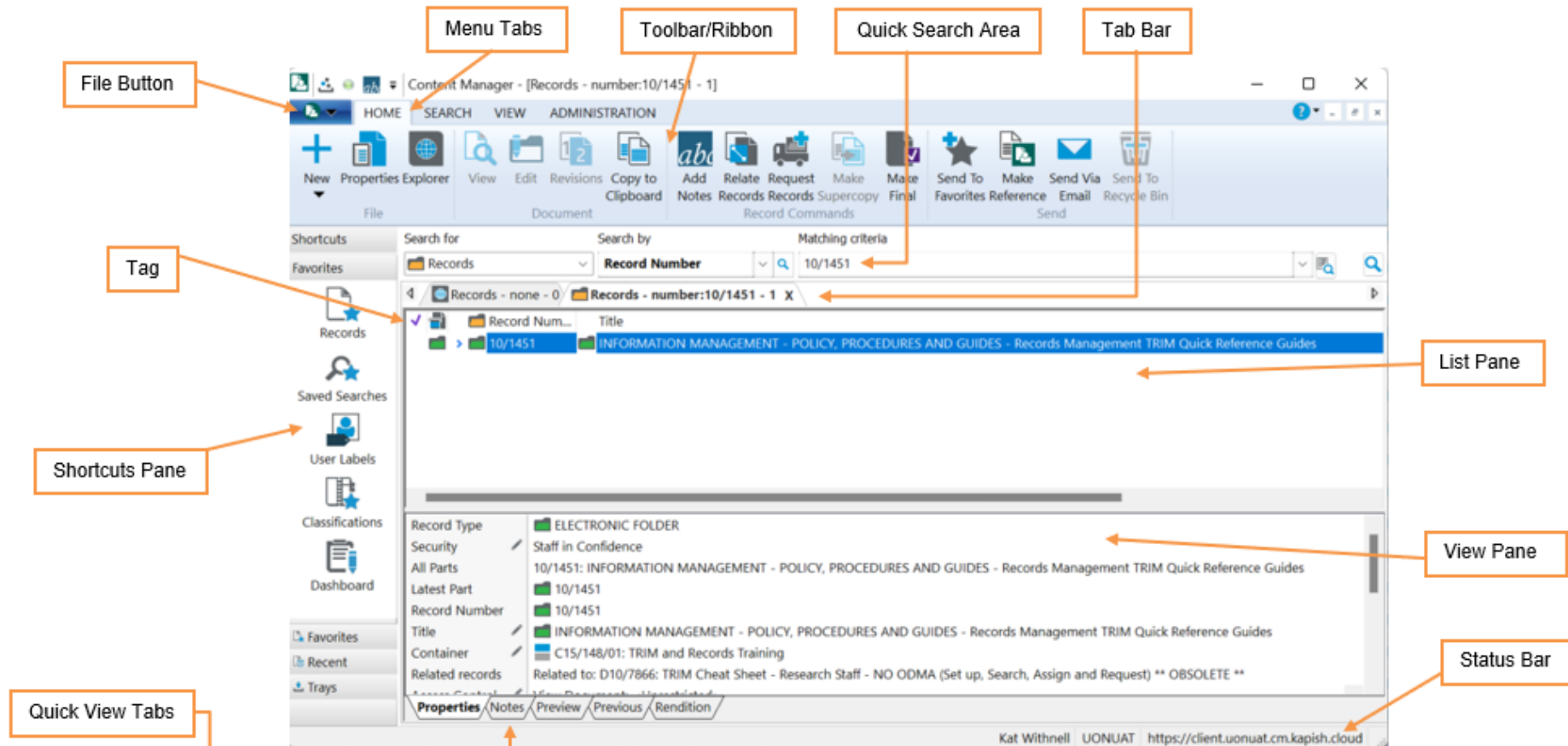


Understanding the TRIM Screen

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



Saving a VIVA Recording to TRIM

The Oral Examination (VIVA) Procedure requires VIVA recordings to be saved to TRIM. Keeping these recordings in TRIM will also assist with the monitoring of VIVAs conducted by Schools.

To save a VIVA recording into TRIM, first you need to ensure it is saved to your computer (e.g. in your **Downloads** folder on your computer). Then, follow the below steps:

1. First, locate and display the student cabinet in TRIM that you want to put the document into. Go to the **Quick Search Area** and
 - Ensure **Records** is displayed in the 'Search for' field.
 - Ensure **Record Number** is displayed in the 'Search by' field.

If not, use the drop-down arrow for each of these fields to display and select the required option:

Search for Search by Matching criteria

Records Record Number []



2. Type the student's **student number** into the 'Matching criteria' field, then to run the search either press **Enter** on the keyboard or click the **magnifying glass** button at the far right of the 'Matching criteria' field:

Search for Search by Matching criteria

Records Record Number 1234567



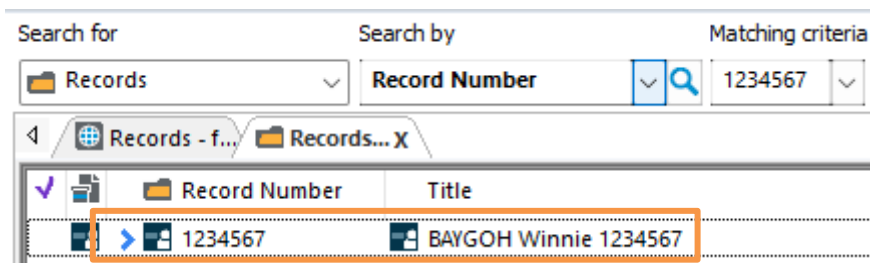
3. The student's student cabinet will display:

Search for Search by Matching criteria

Records Record Number 1234567

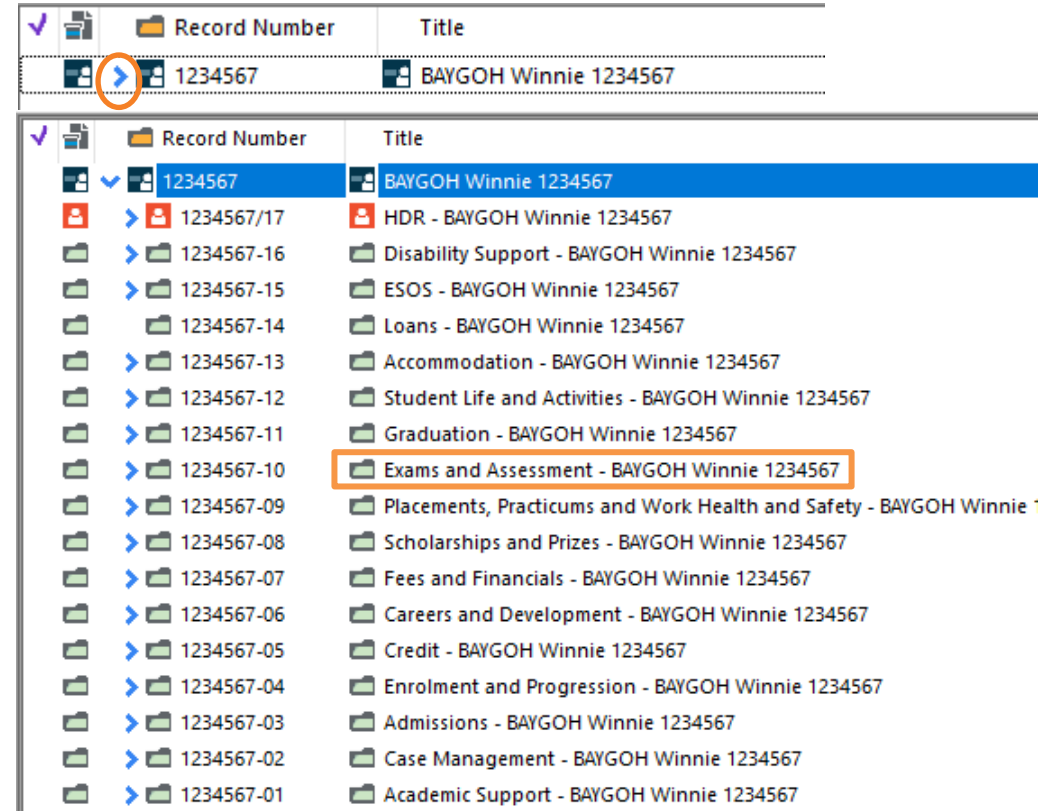
Records - f... Records... X

Record Number	Title
1234567	BAYGOH Winnie 1234567



4. Click the **arrow** next to the student cabinet to display its contents:

Record Number	Title
1234567	BAYGOH Winnie 1234567
1234567/17	HDR - BAYGOH Winnie 1234567
1234567-16	Disability Support - BAYGOH Winnie 1234567
1234567-15	ESOS - BAYGOH Winnie 1234567
1234567-14	Loans - BAYGOH Winnie 1234567
1234567-13	Accommodation - BAYGOH Winnie 1234567
1234567-12	Student Life and Activities - BAYGOH Winnie 1234567
1234567-11	Graduation - BAYGOH Winnie 1234567
1234567-10	Exams and Assessment - BAYGOH Winnie 1234567
1234567-09	Placements, Practicums and Work Health and Safety - BAYGOH Winnie 1234567
1234567-08	Scholarships and Prizes - BAYGOH Winnie 1234567
1234567-07	Fees and Financials - BAYGOH Winnie 1234567
1234567-06	Careers and Development - BAYGOH Winnie 1234567
1234567-05	Credit - BAYGOH Winnie 1234567
1234567-04	Enrolment and Progression - BAYGOH Winnie 1234567
1234567-03	Admissions - BAYGOH Winnie 1234567
1234567-02	Case Management - BAYGOH Winnie 1234567
1234567-01	Academic Support - BAYGOH Winnie 1234567



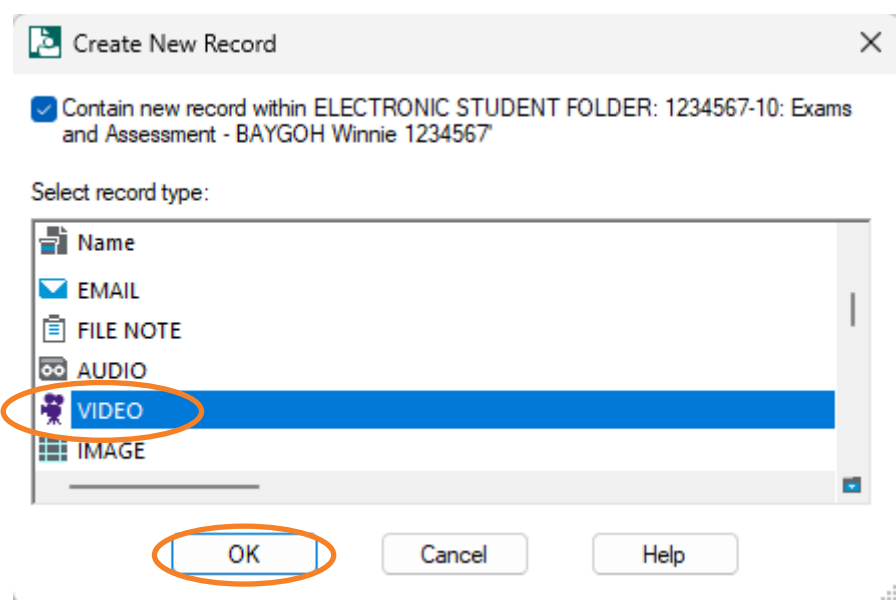
Hint: The **'Exams and Assessment'** subfolder is the subfolder that VIVA records should be saved into.

5. Navigate to where the VIVA recording is currently stored (e.g. your **Downloads** folder).
6. Click on the VIVA recording and drag it across to TRIM. While continuing to hold the mouse button down, drag the VIVA recording onto the **'Exams and Assessment'** subfolder until it highlights blue, then release the mouse button.

Hint: Should you only have one screen; you can drag the VIVA recording onto your TRIM icon (refer below) in your Windows taskbar at the bottom of your computer screen which will display the TRIM window for you:



- This will display the 'Create New record' window. For the VIVA recording you should use the **VIDEO** record type. Click on the **VIDEO** record type once to select it, then click **OK**:



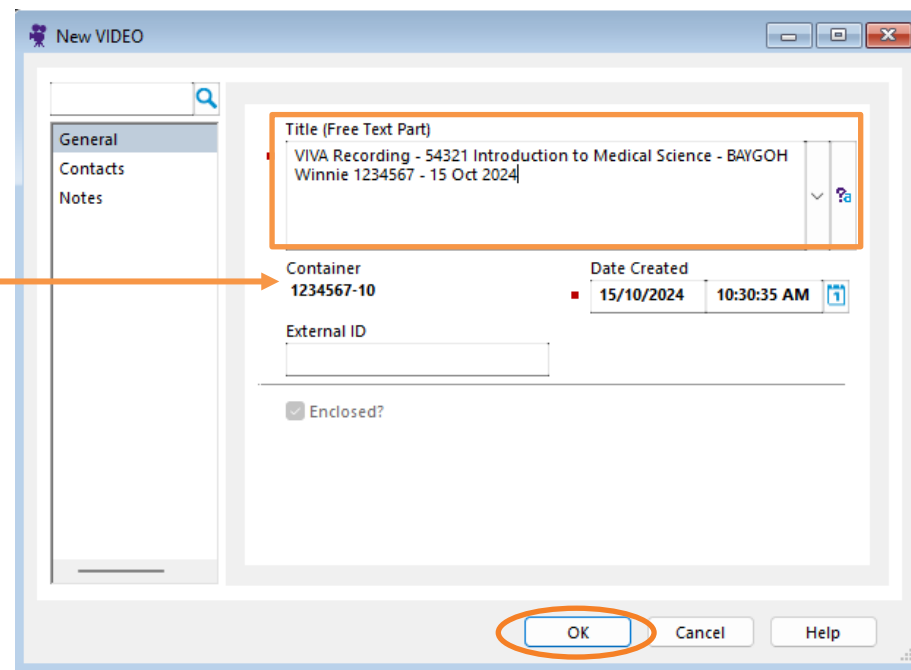
- A 'New VIDEO' Record Entry Form (example below) will appear. In the 'Title (Free Text Part)' field, type/amend the title of the document in line with the below:

Naming Convention:

VIVA Recording - <course code and name> - <student name and number> - DD MM YYYY
(where the date is the date of the recording)

Example:

VIVA Recording - 54321 Introduction to Medical Science - BAYGOH Winnie 1234567 - 3 May 2022



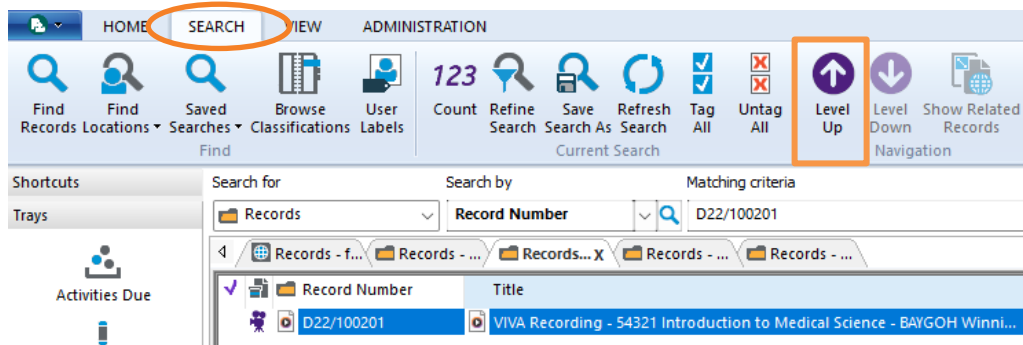
- The 'Container' field will be automatically populated for you because you dragged and dropped your VIVA recording onto the student's 'Exams and Assessment' subfolder. Click **OK** to save the VIVA recording into TRIM.

- The VIVA recording will appear in TRIM:

Record Number	Title
D22/60016	VIVA Recording - 54321 Introduction to Medical Science - BAYGOH Winnie 1234567 - 3 May 2022

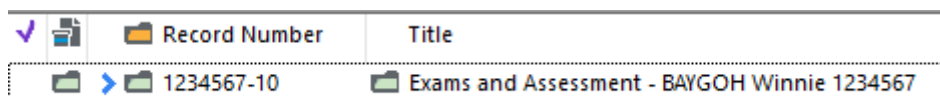
11. If you would like to see the VIVA recording within the context of the student's 'Exams and Assessment' subfolder or their entire student cabinet:

- Click on the VIVA recording once in TRIM to select it
- Ensure the '**SEARCH**' tab is selected
- Click the **Level Up** button

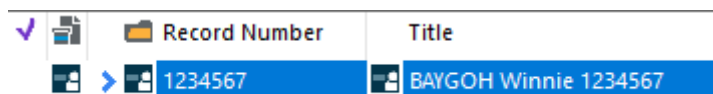


Hint:

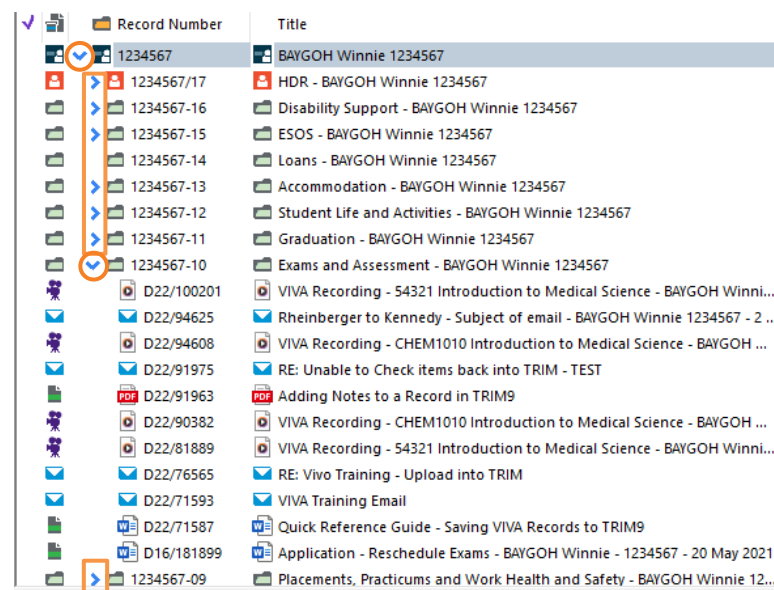
Clicking the **Level Up** button once will display the student's 'Exams and Assessment' subfolder:



Clicking the **Level Up** button a second time will display the student's student cabinet:



Clicking the **arrow** next to the student cabinet or any subfolders will display/hide its contents:



Viewing VIVA Recordings and Other Records in TRIM

There are a few different ways to view a record (video, document, spreadsheet, email etc.) in TRIM. All these methods are detailed below to assist you in determining your preferred method for viewing records:

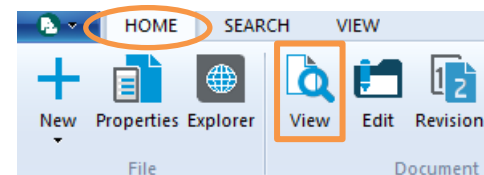
1. Locate the record which you want to view, then refer to the three methods below:

Method 1: Double-click the record to view it.

Method 2: Right-click the record and select **View**:

Method 3: Click on the record once to select it.

Then select the **HOME** tab, and then click the **View** button:

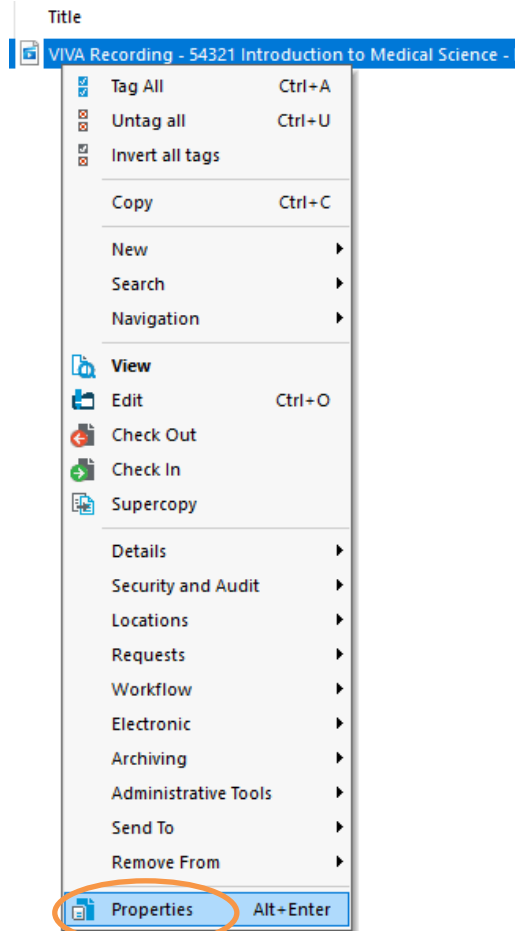


Changing the Title of a Record

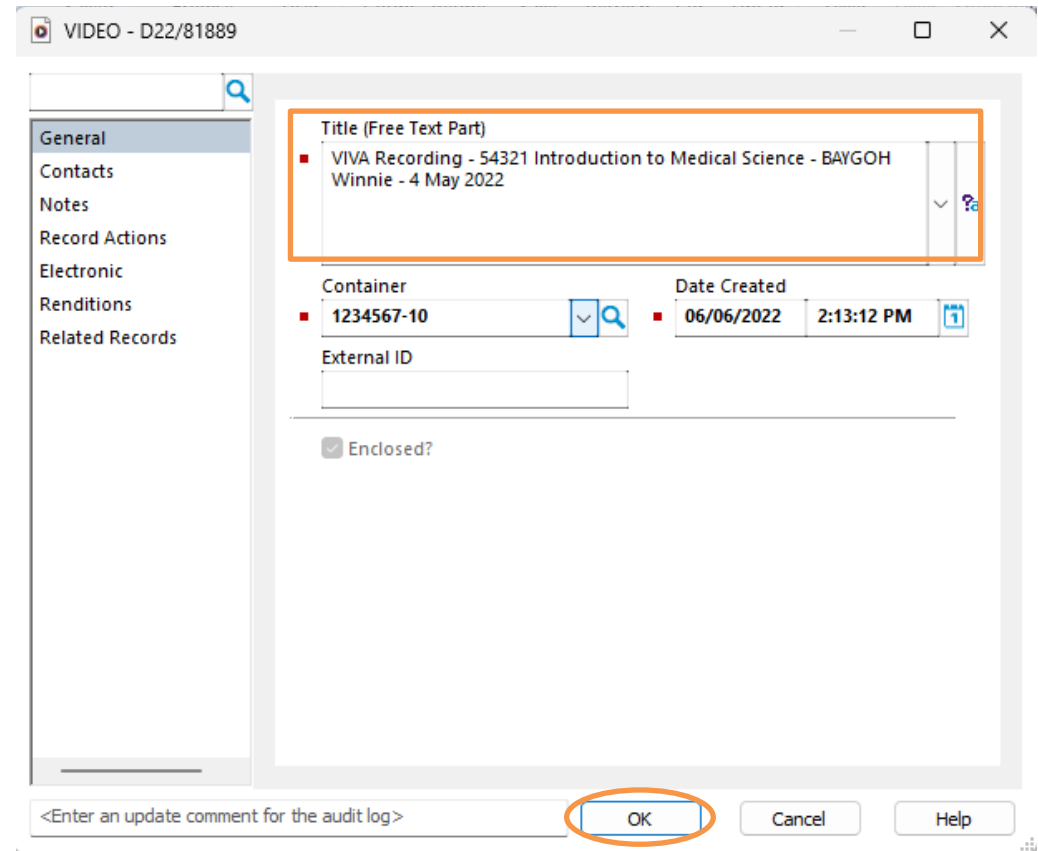
You can change the title of a record in TRIM if you have made an error or you need to add additional information.

To change the title of a record in TRIM:

1. Locate the record for which you want to change the title.
2. Right-click on the record and select **Properties**:



3. The **Record Entry Form** for that record will appear. In the 'Title (Free Text Part)' field, update the title as required, then select **OK**:



4. The record will now display its updated title:

Record Number	Title
D22/60016	VIVA Recording - 54321 Introduction to Medical Science - BAYGOH Winnie 1234567 4 May 2022

Adding Notes to a VIVA Recording in TRIM

Should you need to capture notes against a VIVA recording or any other record in TRIM in order to provide additional information about the content/context of the record, please refer to the [TRIM - Quick Reference Guide - D20/145520 - Adding Notes to a Record in TRIM](#) for guidance on how to do this.

E.g. You could record a note against a VIVA recording detailing who conducted the VIVA.

Moving Records from one Container to Another

The term 'container' in TRIM is used to describe a record type which can contain a record inside of it. Typically, this would be a folder which contains a document; however, in TRIM at UON there are many different folder record types, as well as sub-folder record types and cabinet record types which can all contain other records. Hence, the term 'container' is used to broadly refer to them all.

Should you accidentally place a VIVA recording or other record in the wrong container, please refer to the [TRIM - Quick Reference Guide - D20/145537 - Moving Records between Containers in TRIM](#) for guidance on how to move it to the correct container.

Deleting Records

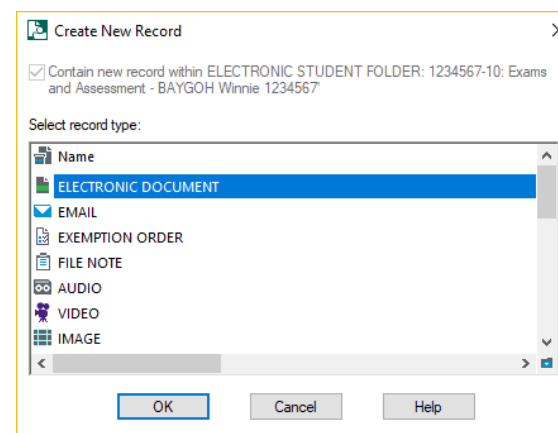
Occasionally a record requires deletion from TRIM, most often because it was accidentally put in TRIM twice. Should you need to delete a record from TRIM, please refer to the [TRIM - Quick Reference Guide - D20/145526 - Deleting Records in TRIM](#) for guidance on deleting records.

Saving Other VIVA Records to TRIM

If you happen to have other records in addition to but related to a student's VIVA that you are required to save to TRIM, they too should be added to the student's '**Exams and Assessment**' subfolder. Like saving a VIVA recording to TRIM, other records such as documents and emails can also be dragged from their current location (Desktop, Windows Explorer, Outlook) and dropped into TRIM.

Hint: When saving these other records to TRIM and the 'Create New Record' window displays, be sure to select the record type which matches the record you're saving to TRIM. E.g. **ELECTRONIC DOCUMENT** if it is a document, **EMAIL** if it is an email:

Quick Reference Guide – Managing VIVA Records in TRIM (D22/59304)



Hint: To title these other records, you can use the below Naming Conventions:

Emails:

<surname of sender to surname of recipient - <subject of email> - <course code and name> - <student name and number> - DD MM YYYY

All Other Records:

<description of record> - <course code and name> - <student name and number> - DD MM YYYY

(where, if applicable, the date is the date of the recording. Otherwise, if required, it can be any other applicable date such as date of correspondence)

Hint: Below is a link to all UON TRIM Knowledge Guides on the Records Governance SharePoint site should you be interested in learning more:

[TRIM Knowledge Guides](#)