

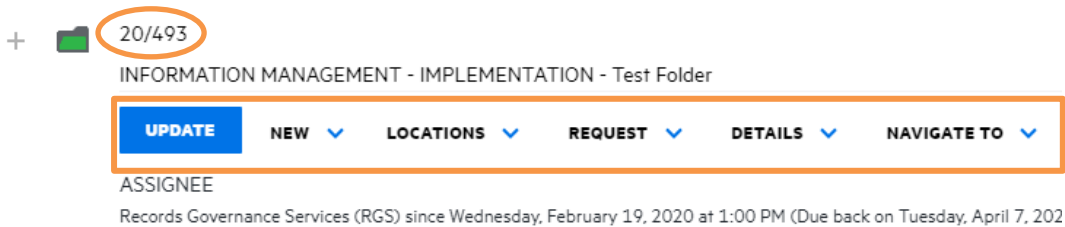
Creating Documents and Emails

Note: In order to upload a document, spreadsheet, photo etc. to TRIM9 using the Web Client, you must already have it saved locally on your computer or available through Windows Explorer/Finder (e.g. on a share drive or in SharePoint).

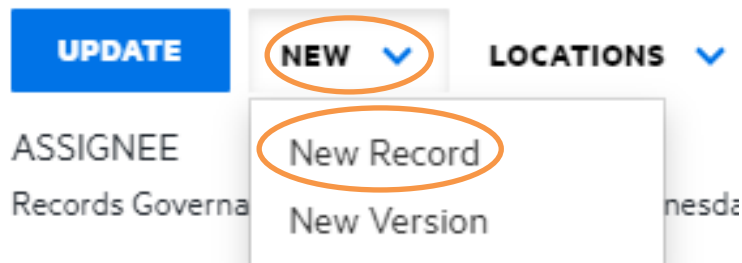
Hint: Emails however do have an alternate option where they don't have to be saved on your computer, and instead can be dragged and dropped straight from the Outlook Client (not Web Mail) into the TRIM Web Client.

To create a document, email, photo etc. in the TRIM9 Web Client:

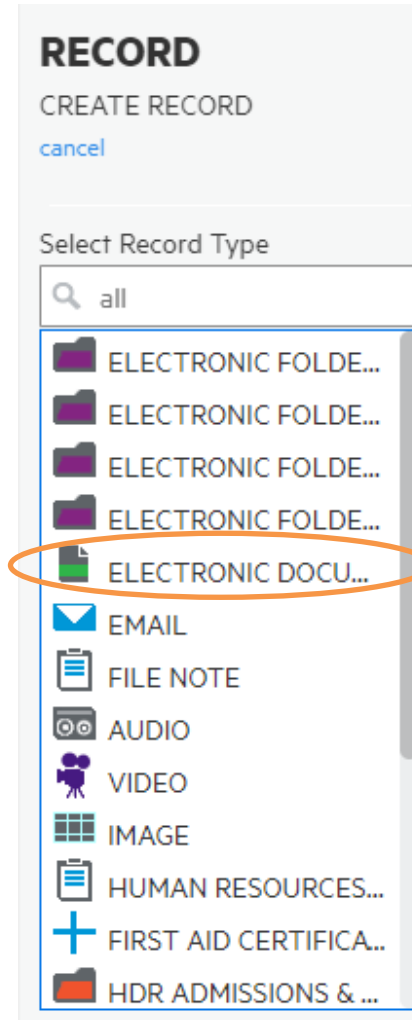
1. Locate the folder you want to save the document in.
2. Ensure the options for the folder such as UPDATE, NEW, LOCATIONS etc. are displayed. If not, click on the record number once to display them:



3. With the folder options displayed, click on the **NEW** drop-down and select **New Record**:



4. The **'CREATE RECORD'** section will appear on the left of your TRIM9 Web Client screen with a list of record types to select from. Only record types which can reside inside your selected folder and which you have access to use will display. Click on the **record type** that corresponds to the record you are wanting to upload to TRIM9 (**ELECTRONIC DOCUMENT** has been chosen for this example):



5. The Record Entry Form for your selected record type will display. You may need to scroll down to see the entire Record Entry Form. Any mandatory field will have '(Required)' next to the field name:

GENERAL

Title (Free Text Part) **(Required)**

Container **(Required)**
20/493 INFORMATION MANAGEMENT - IMPLEMENTATION - Test Folder

Date Written (Created) **(Required)**
9/07/2020 9:57 AM

External ID

☐ Physical Original Executed Agreement Received

Alternative container
< Enter Search Query >

☐ Enclosed?

NOTES

Attach electronic document

Click here or Drag and Drop to upload files

SAVE CANCEL

6. Complete any 'Required' fields which haven't already been populated, and any optional fields for which you have information which you would like to record.

Note: For the 'Title' field, if the record you are going to upload is already well titled you can leave this field blank, and when you upload the record the 'Title' field will automatically populate with the title of the uploaded record.

Hint: When titling records in TRIM9, please adhere to local naming guidelines for your area if they exist, or the below guidelines available both in TRIM9 and on the Records Governance Services website:

- Naming Convention for TRIM – Student Records (D15/61944)
- Quick Reference Guide – TRIM Record Titling (D18/353404)

7. Click in the area titled **Attach electronic document**:

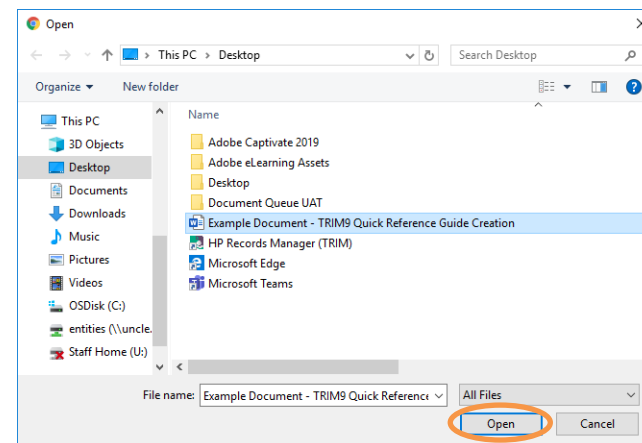
Hint: You can instead choose to drag and drop the document you want to upload into this **Attach electronic document** area, and then skip forward to [Step 9](#). This includes dragging and dropping an email straight from the Outlook Client.

Attach electronic document

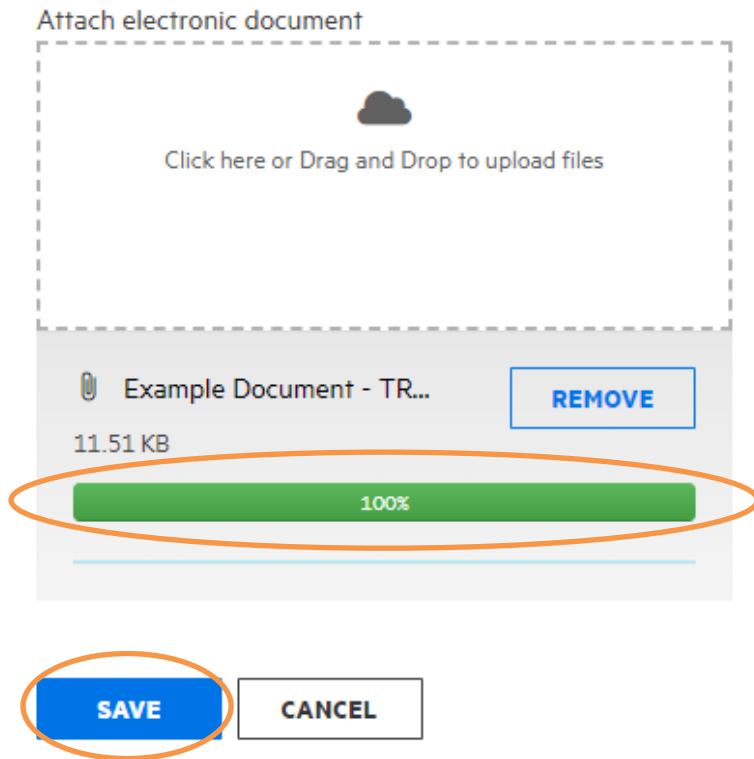
Click here or Drag and Drop to upload files

SAVE CANCEL

8. File Explorer/Finder will open. Navigate to where the document you want to upload is saved, click on it once to select it, then select **Open**:



9. The record will upload and show a green 100% bar when complete. Click **SAVE** to complete the upload process and create the record in TRIM9:



10. Click the **+** next to the folder you added the record to in order to see your newly created record:

