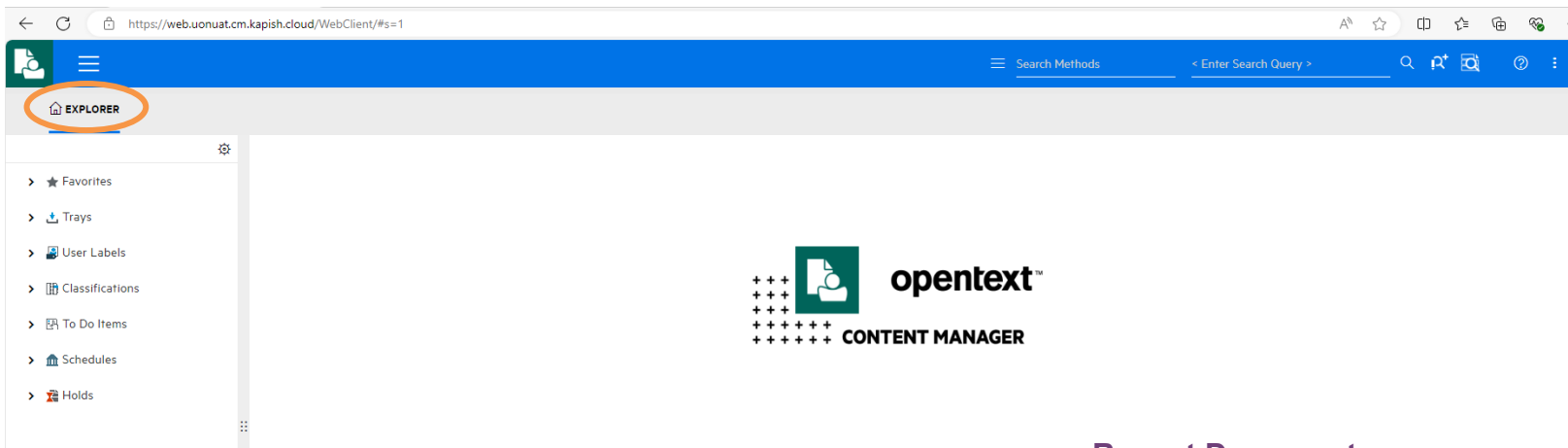


TRIM has several different Shortcuts, which when used effectively can really improve the speed and ease of locating records. This quick reference guide will give a brief description of each of the Shortcuts and how to find them, followed by instructions on how to add records to and remove records from them.

EXPLORER WINDOW

When you load the TRIM Web Client, 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 two panes: the **'Navigation Pane'** and the **'List Pane'**.

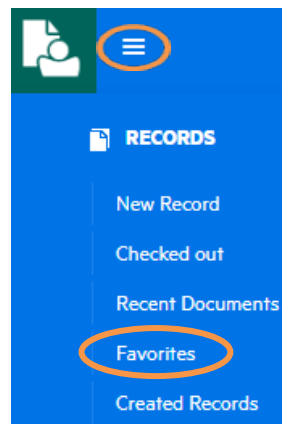
The **'Explorer'** window is available at any time by clicking **'Explorer'** at the top left of the TRIM Web Client screen:



Favourites

Favourites are your favourite/regularly used records.

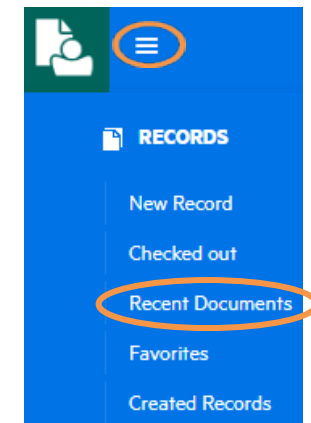
Your **Favourite Records** are available on the **'Explorer'** window in the **'Navigation'** pane, or by clicking the **Menu** button and selecting **Favourites**:



Recent Documents

Recent Documents is automatically populated with the 25 most recent Documents you have created or edited.

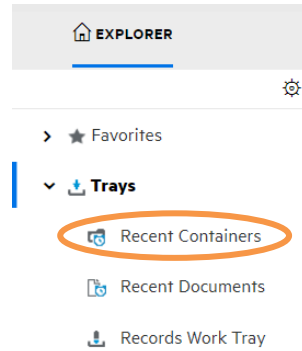
Your **Recent Documents** are available on the **'Explorer'** window in the **'Navigation'** pane under **'Trays'**, or by clicking the **Menu** button and selecting **Recent Documents**:



Recent Containers

Recent Containers is automatically populated with the 25 most recent Containers you have created or added a record to.

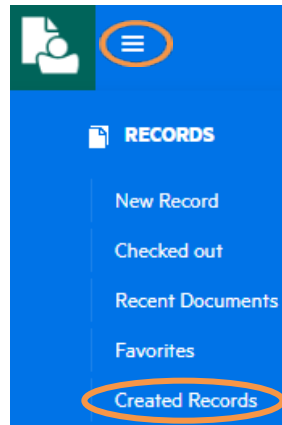
Your **Recent Containers** are available on the **'Explorer'** window in the **'Navigation'** pane under **'Trays'**.



Created Records

Created Records is automatically populated with every record you have ever created in TRIM.

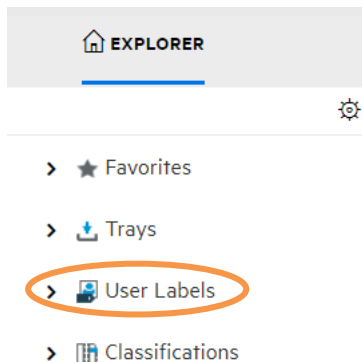
Your **Created Records** are available by clicking the **Menu** button and selecting **Created Records**:



User Labels

User Labels enable you to create your own categories to arrange and manage records specifically for your own or your team's own requirements.

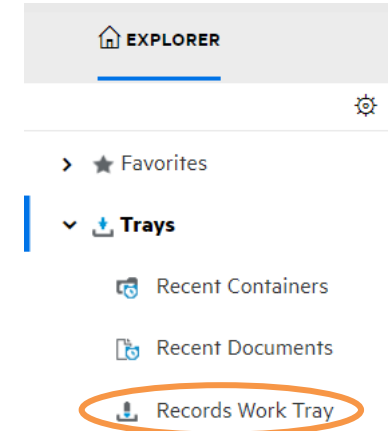
User Labels are available on the **'Explorer'** window in the **'Navigation'** pane



Records Work Tray

Records Work Tray is like a temporary Favourites. Any open matter/file/case etc. can be stored here until you have finished with it.

Your **Records Work Tray** is available on the **'Explorer'** window in the **'Navigation'** pane under **'Trays'**.

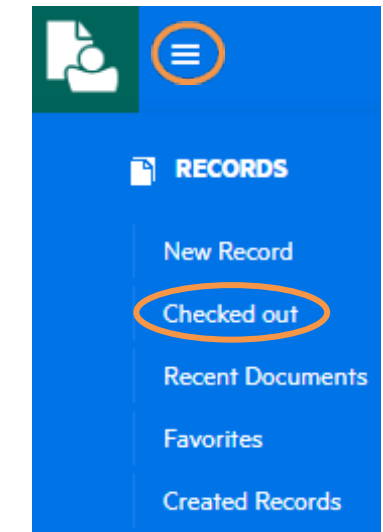


Documents Checked Out

These are documents which you have checked out of TRIM and saved locally on your computer for editing. If you have a document checked out, others will have to wait until you have finished editing the document and saved your changes back into TRIM before they can edit the document themselves.

When you are wanting to **Check In** a document (save the changes you made to a document back into TRIM), doing it from your **Documents Checked Out** shortcut is often the easiest way to do it.

Your **Documents Checked Out** are available by clicking the **Menu** button and selecting **Checked out**:



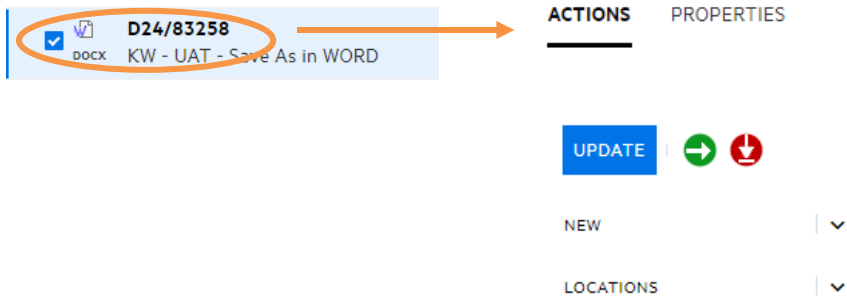
Adding to and Removing from Shortcuts

As the name suggests, Shortcuts are quick ways to find records. When you add a record to

one of your Shortcuts you are simply creating a link to that record (you **are not** moving it from one Container to another). Therefore, just because a record is in one or more of your Shortcuts does not mean it is inaccessible to other TRIM users.

Recent Documents, Recent Containers, Created Records and **Documents Checked Out** are all automatically populated through your everyday use of TRIM. However **Recent Documents** and **Recent Containers** can be manually populated and managed, so too can **Favourites, Records Work Tray** and **User Labels**. Please refer below instructions:

1. Ensure the options for the record such as ACTIONS, PROPERTIES, UPDATE etc. are displayed. If not, click on the record number once, or tick the box next to the record number to display them on the right-hand side of your screen:



2. Click on the **ADD/REMOVE** drop-down and select your required option:

