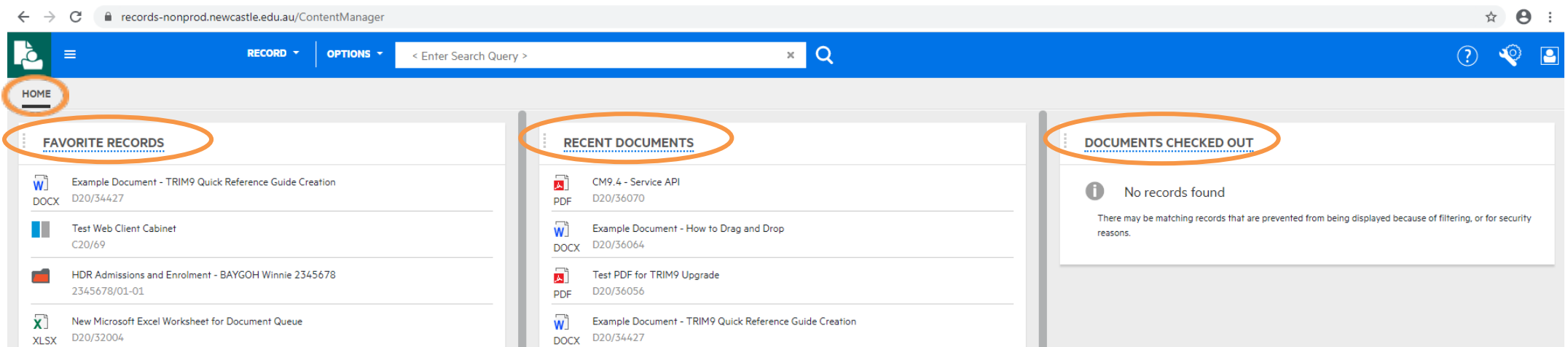


TRIM9 has several different Shortcuts, which when used effectively can really improve the speed and ease of locating records. This quick reference guide will give a brief description of each of the Shortcuts and how to find them, followed by instructions on how to add records to and remove records from them.

HOME

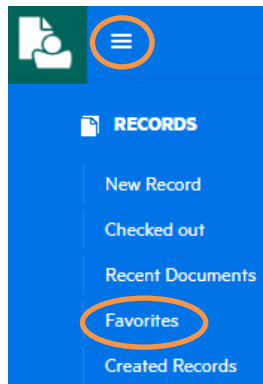
Each time you open the TRIM9 Web Client you will be presented with the **HOME** tab. The **HOME** tab consists of three Dashboard Items; 'FAVORITE RECORDS', 'RECENT DOCUMENTS' and 'DOCUMENTS CHECKED OUT'. These are explained in their own section below.

The **HOME** tab is available at any time by clicking **HOME** at the top left of the TRIM9 Web Client screen:



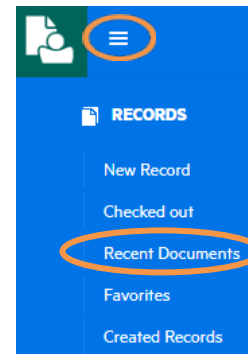
Favourites

Favourites are your favourite/regularly used records. Your **Favourite Records** are available on the **HOME** tab, 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 **HOME** tab, or by clicking the **Menu** button and selecting **Recent Documents**:



Recent Containers

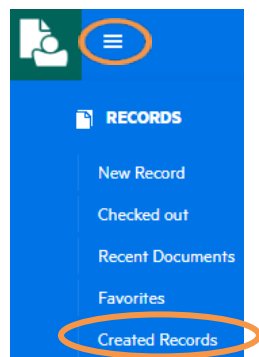
Recent Containers is automatically populated with the 25 most recent Containers you have created or added a record to. To see your **Recent Containers**:

- In the TRIM9 Web Client **Search Area**, ensure the first circled field below is populated with **RECORD**,
- Type 'mycontainers' into the search query field as shown below,
- Click on the **magnifying glass** search button to the right of the **Search Area**:



Created Records

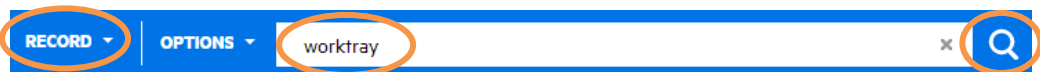
Created Records is automatically populated with every record you have ever created in TRIM9. Your **Created Records** are available by clicking the **Menu** button and selecting **Created Records**:



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. To see your **Records Work Tray**:

- In the TRIM9 Web Client **Search Area**, ensure the first circled field below is populated with **RECORD**,
- Type 'worktray' into the search query field as shown below,
- Click on the **magnifying glass** search button to the right of the **Search Area**:

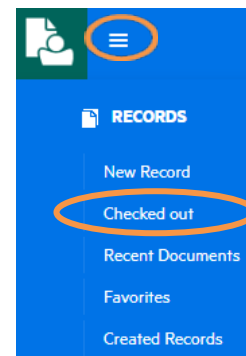


Documents Checked Out

These are documents which you have checked out of TRIM9 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 TRIM9 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 TRIM9), doing it from your **Documents Checked Out** shortcut is often the easiest way to do it.

Your **Documents Checked Out** are available on the **HOME** tab, or by clicking the **Menu** button and selecting **Checked out**:



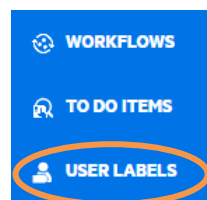
User Labels

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 by:

- Clicking the **Menu** button at the top left of the TRIM9 Web Client screen:



- Four columns of options will display. In the fourth column, click on **USER LABELS**:




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 TRIM9 users.

Recent Documents, **Recent Containers**, **Created Records** and **Documents Checked Out** are all automatically populated through your everyday use of TRIM9. 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:

- Ensure the options for the record such as UPDATE, NEW, LOCATIONS etc. are displayed. If not, click on the record number once to display them:

DOCX  **D20/34430**

Example Document - TRIM9 Quick Reference Guide Creation

UPDATE	NEW ▾			LOCATIONS ▾	REQUEST ▾	DETAILS ▾	NAVIGATE TO ▾	WORKFLOW ▾	ADD/REMOVE ▾	MORE ▾
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ASSIGNEE	DATE REGISTERED
In container '20/493 (Records Governance Services (RGS))' since Tuesday, April 7, 2020 at 4:33 PM	Tuesday, April 7, 2020 at 4:33 PM

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

ADD/REMOVE ▾

- Add to Favorites
- Send to Records Work Tray
- Add to User Label
- Remove from Recent Documents
- Remove from User Label