Introducing TRIM - Content Manager

TRIM 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 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.

Accessing the Web Client

TRIM can be accessed using the TRIM Web Client from a PC, Mac, laptop, iPad, iPhone or other mobile device; TRIM does not need to be installed on the device. This includes UON maintained desktop/laptop computers accessed through the UON network, or any offsite computer or mobile device (e.g. at home) with internet access.

Note: If you are working off campus, prior to accessing TRIM, please ensure that you are connected through the **GlobalProtect 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.

Note: You can access Content Manager Web Client via a supported version of Chrome, Microsoft Edge, and Firefox.

The URL to enter in your browser is:

- https://web.uonprd.cm.kapish.cloud/

You will need to be a registered TRIM user to access the system. When accessing the TRIM Web Client via your browser, you will be prompted to sign in with your UoN logon details. You will then be prompted to enter your extra verification factor; how you have this set up may vary.
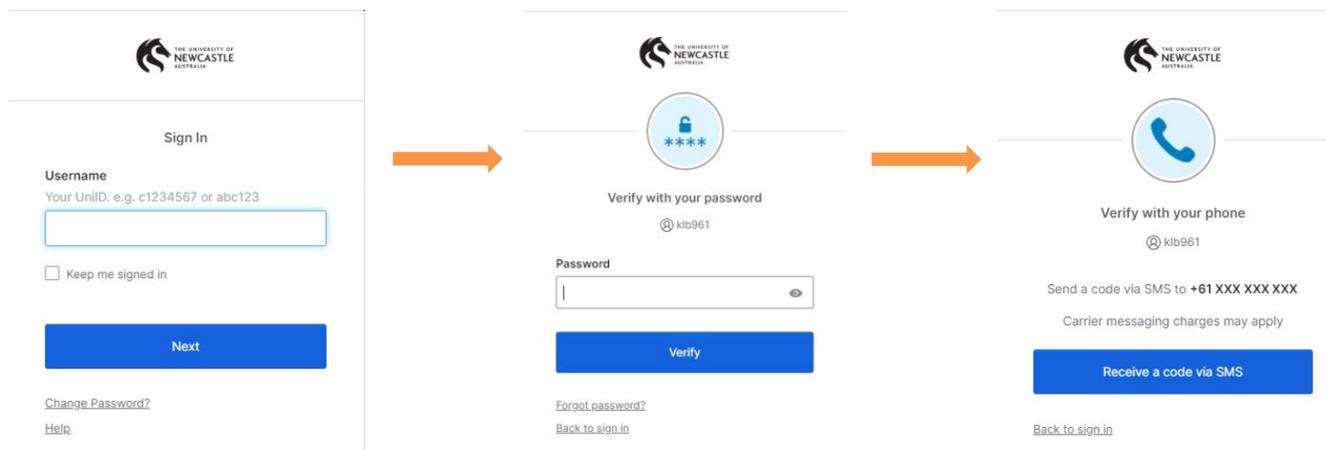
Support

Records Governance Services

Phone: 492 15306

Email: records@newcastle.edu.au

TRIM 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:

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

The **Explorer** window is available at any time by clicking **Explorer** at the top left of the TRIM Web Client screen.
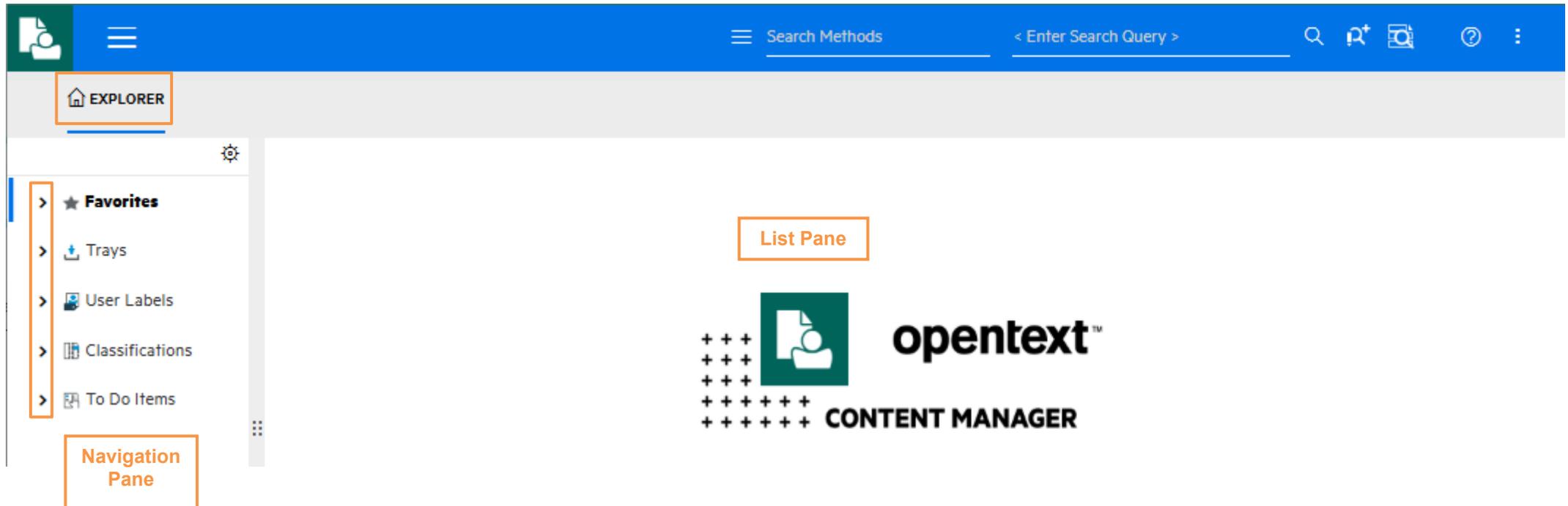
Understanding the TRIM Web Client home screen

Please refer to the below picture for an explanation of the different sections which make up the TRIM Web Client home screen:

- **Home Button** – Returns you back to the Explorer window.
- **Menu Button** – Displays a more comprehensive list of links and shortcuts to items such as saved searches, record actions, workflow activities and check in styles.
- **Browser Reload Button** – Reloads your TRIM Web Client session and returns you to your Dashboard. If you have let the Web Client sit idle for a while it can be a good idea to use this button to reload your session before recommencing work.
- **Search Area** – Use this are to perform searches, and filter and sort search results.
- **Help Button** – UON has an extensive list of Quick Reference Guides to assist staff with using the TRIM Web Client, and RGS staff are always happy to provide assistance by phone, Zoom or email. However, the **Help** button will open an online searchable Web Client guide for you should you need to or want to self-seek additional Web Client help and instructions.
- **Ellipsis Button** – Can be used to select settings, as well as setup information and to log out.
- **Actions and Properties Panel** – The Actions and Properties Panel appears when you select a record or object. It has two main sections:
  - **Actions** – shows tasks you can perform on the selected record.
  - **Properties** – displays the records metadata*.
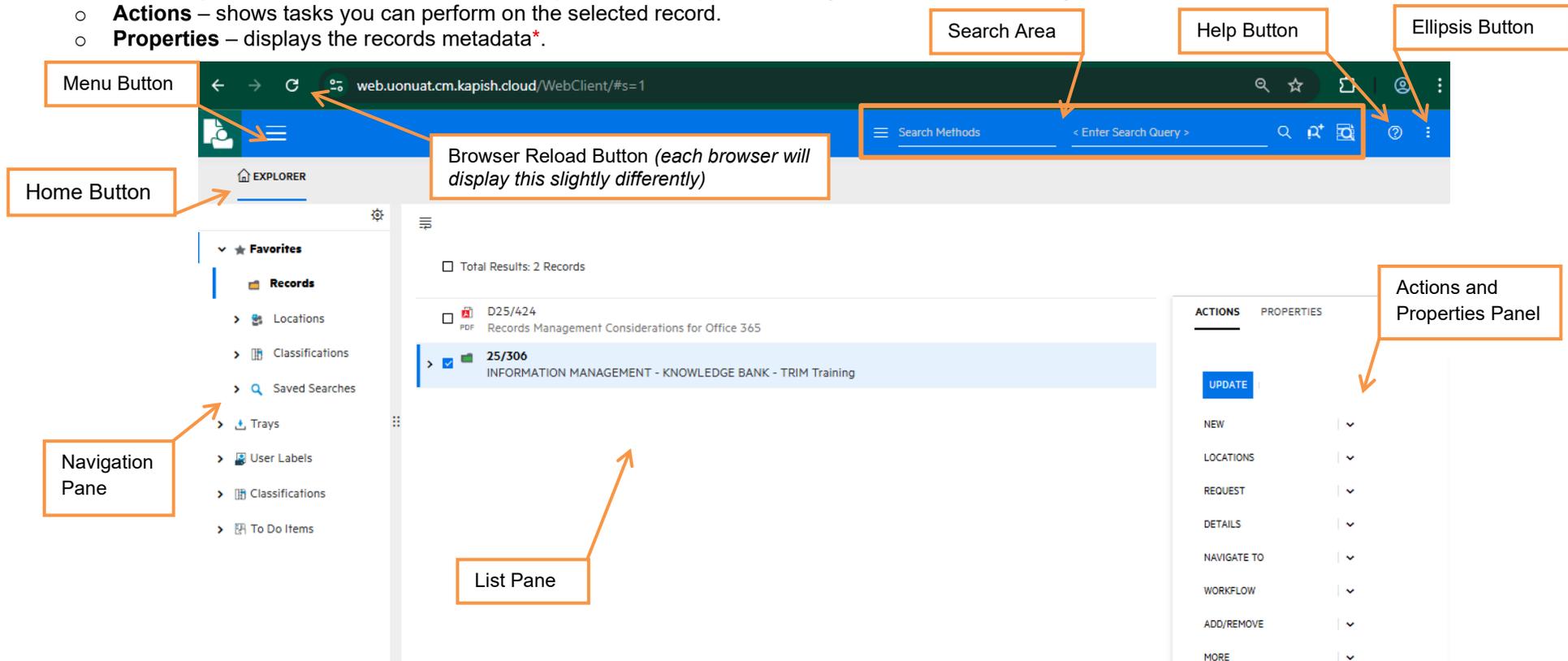
Metadata is the descriptive information about a record or document (such as its title, author, date, and classification) that helps identify and manage it without opening the actual file.

Grid view

Grid View allows you to customise your list pane display. You can add or remove columns, rearrange them by dragging, and sort data by clicking on column headers. Columns widths can be adjusted by dragging the edges of the headers, but can also be resized with the **Resize Columns to Fit** button in the standard toolbar of the results tab.
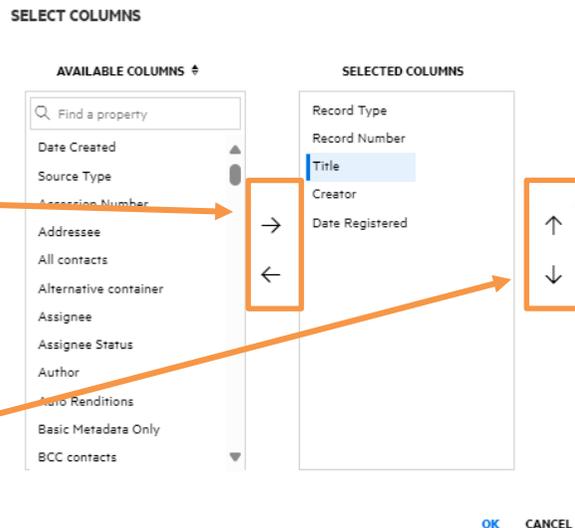
To add and remove columns in **Grid View**:

1. Click the **Properties Icon** in the toolbar of the results tab:
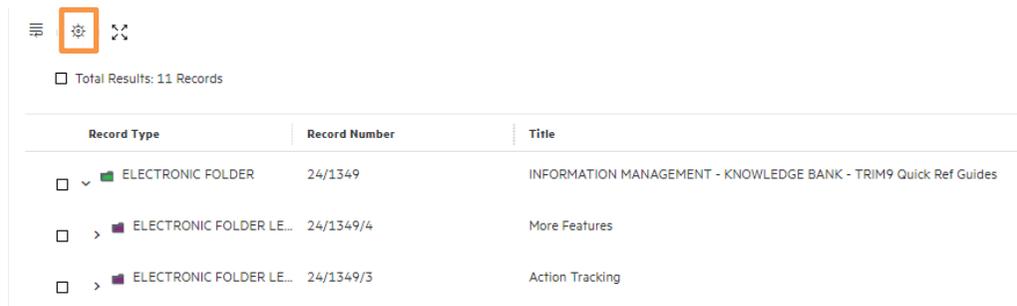
2. The **Select Columns** window will appear. From here, you can add and remove columns by clicking on the arrows in the middle of the window

3. To re-order the selected columns, you can do this by clicking on the arrows on the right-hand side of the window to move the column header up or down:

4. When you have finished making your changes, click **OK**. Your TRIM Web Client screen will quickly flicker in the background, and your changes will be reflected in the column headers.

You also have the option to change between Grid View and List View depending on your preference. You can do this by:

1. Click the **List View Icon** in the toolbar of the results tab:
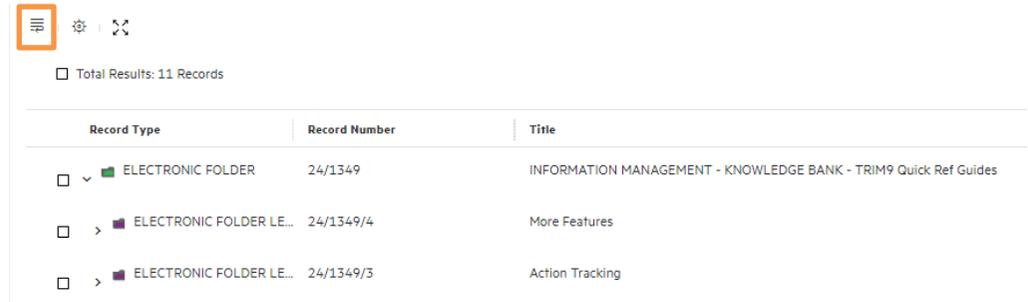
2. Your List Pane view will update automatically to reflect the changes. Click the same button again to return to **Grid View.**
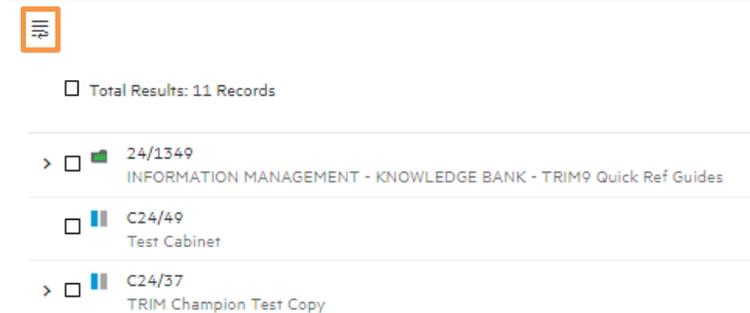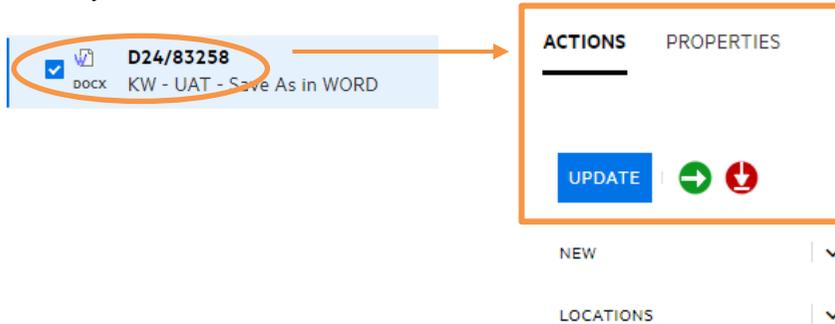
Note: If you have a requirement to use both the Web Client and Full Client, the column settings will be applied when updated in either application. The exception to this, is the column width settings, only the client settings will be pushed to the Web Client, changes made to the column widths in the Web Client will not be reflected in the Full Client application.

Properties panel

When working with a particular record in the TRIM Web Client, it is possible to view information about that record (metadata) in the Properties Panel. To do this:

1. Tick the box next to the record or click on the record number once to display options such as ACTIONS, PROPERTIES, UPDATE etc. on the right-hand side of your screen:

1. Click on the **PROPERTIES** tab:
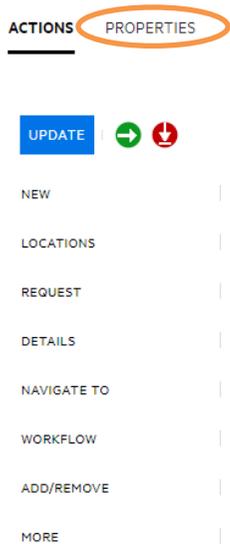
2. The **Properties panel** will display:

ELECTRONIC DOCUMENT

Record Type:
ELECTRONIC DOCUMENT

Record Number:
D20/34427

Title:
Example Document - TRIM9 Quick Reference Guide Creation

Container:
20/523: STRATEGIC MANAGEMENT - MEETINGS - Test Web Client Folder - Bryce

Alternative container:

Related records:

Creator:
Bryce Rheinberger

Author:
Bryce Rheinberger

Date Created:
Wednesday, March 20, 2019 at 2:21 PM

Date Registered:
Tuesday, April 7, 2020 at 4:17 PM

Date Modified:
Tuesday, April 28, 2020 at 3:08 PM

Edit Status:
Checked In

Checked Out To:

Checked Out On:

Revision Number:
4

Number of Pages:
1

Edit status

The edit status of a document appears in the **Properties panel** (refer information above and picture to the right).

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

If the Edit Status 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. **Checked Out To** and **Checked Out On** (directly below **Edit Status**) will tell you who has it checked out and when they checked it out.

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

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

Revision number

When you view a document in the TRIM Web Client you are viewing the current revision. You can see how many revisions a document has by checking the number listed below Revision Number in the **Properties panel** (refer right). Every time a document 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 on the record file type icon to open the record in the Preview panel. Click **Revisions** on the right-hand side of your screen. The Revisions panel will open displaying all revisions associated with the record. On the list, click the revision you want to view, and the panel will update and display the content of the selected revision:

ELECTRONIC DOCUMENT

Record Type:
ELECTRONIC DOCUMENT

Record Number:
D20/34427

Title:
Example Document - TRIM9 Quick Reference Guide Creation

Container:
20/523: STRATEGIC MANAGEMENT - MEETINGS - Test Web Client Folder - Bryce

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Related records:

Creator:
Bryce Rheinberger

Author:
Bryce Rheinberger

Date Created:
Wednesday, March 20, 2019 at 2:21 PM

Date Registered:
Tuesday, April 7, 2020 at 4:17 PM

Date Modified:
Tuesday, April 28, 2020 at 3:08 PM

Edit Status:
Checked Out

Checked Out To:
Bryce Rheinberger

Checked Out On:
Thursday, April 30, 2020 at 11:35 AM

Revision Number:
4

Number of Pages:
1

REVISIONS

Revision Number 1
Date Modified : 27/08/2020 at 11:20 AM
Checked In By : Withnell, Kat
Extension : PDF
☐ Preserve