

## Introducing TRIM9 - Content Manager

TRIM9 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. TRIM9 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.

## Accessing the Web Client

TRIM9 can be accessed using the TRIM9 Web Client from a PC, Mac, laptop, iPad, iPhone or other mobile device; TRIM9 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:** To access the TRIM9 Web Client from offsite you will need the UON VPN (GlobalProtect) software installed on your device. Should you require assistance with VPN please contact the IT Service Desk (ServiceUON IT Service Portal or phone extension 17000).

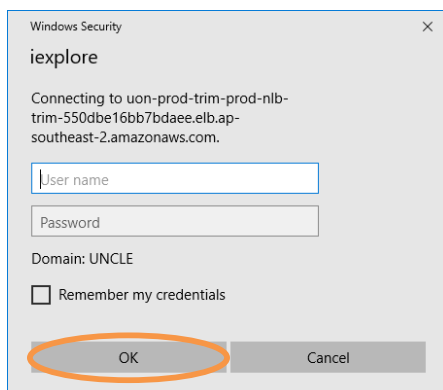
**Note:** Internet Explorer is the recommended browser for accessing the TRIM9 Web Client.

The URL to enter in your browser is:

- <https://records.newcastle.edu.au>

You will need to be a registered TRIM user to access the system. When accessing the TRIM9 Web Client via your browser you will be prompted for your UON network logon details.

Enter your credentials then select **OK**:



A screenshot of a Windows Security dialog box titled "iexplore". The dialog shows the connection details: "Connecting to uon-prod-trim-prod-nlb-trim-550dbe16bb7bdae.elb.ap-southeast-2.amazonaws.com." Below this are input fields for "User name" and "Password". The "Domain" is set to "UNCLE". There is a checkbox for "Remember my credentials" which is currently unchecked. At the bottom, there are "OK" and "Cancel" buttons. The "OK" button is highlighted with an orange oval.

## Support

### Records Governance Services

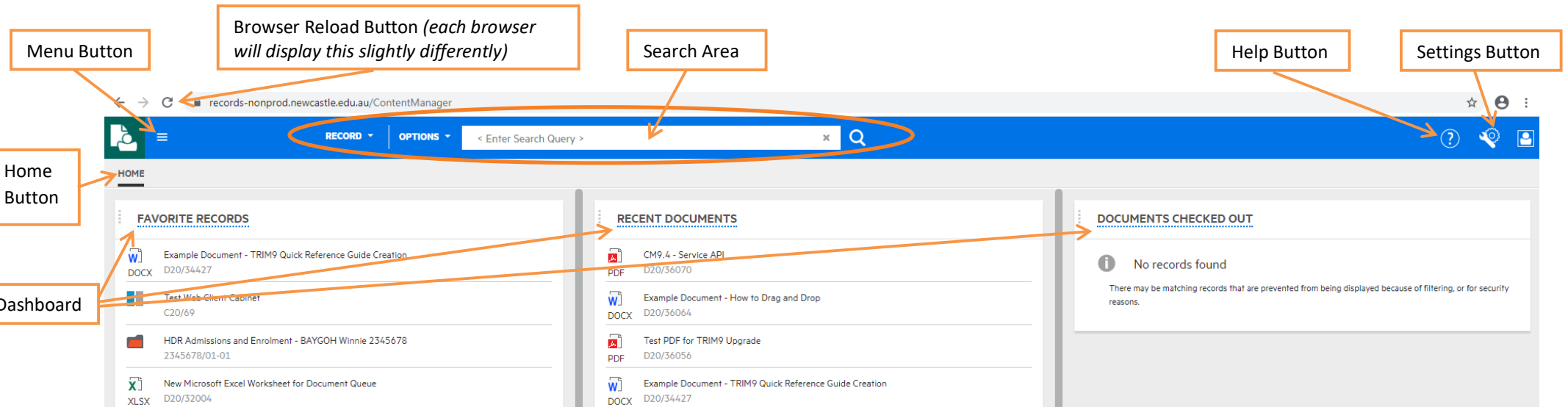
Phone: 492 15306

Email: [records@newcastle.edu.au](mailto:records@newcastle.edu.au)

## Understanding the TRIM9 Web Client Home Screen

Please refer to the below picture for an explanation of the different sections which make up the TRIM9 Web Client home screen:

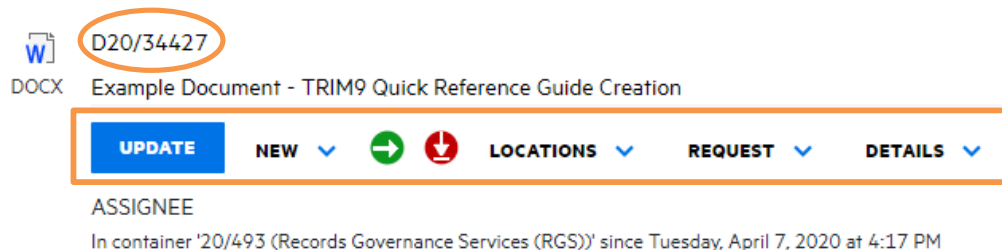
- **Dashboard** – The Home Screen of the TRIM9 Web Client is a dashboard that allows users easy access to up to three items. The default Dashboard items are **Documents Checked Out**, **Favorite Records** and **Recent Documents**.
- **Home Button** – Returns you back to your Dashboard.
- **Menu Button** – Displays a more comprehensive list of links and shortcuts to items such as records checked out by you, records created by you, saved searches, record actions and workflow activities.
- **Browser Reload Button** – Reloads your TRIM9 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 area 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 TRIM9 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.
- **Settings Button** – Can be used to select different dashboard items should you wish to change from the three default dashboard items as displayed in the picture below:



## Properties Panel



When working with a particular record in the TRIM9 Web Client it is possible to view information about that particular record (metadata) in the Properties Panel. To do this:

1. 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 **D20/34427**

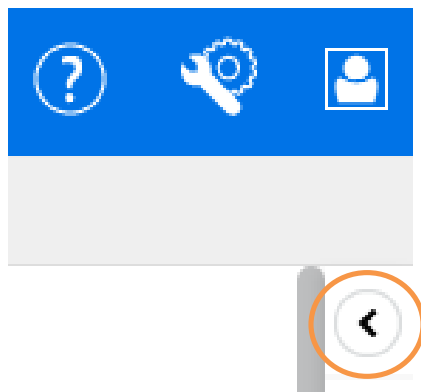
Example Document - TRIM9 Quick Reference Guide Creation

**UPDATE** NEW   **LOCATIONS** **REQUEST** **DETAILS**

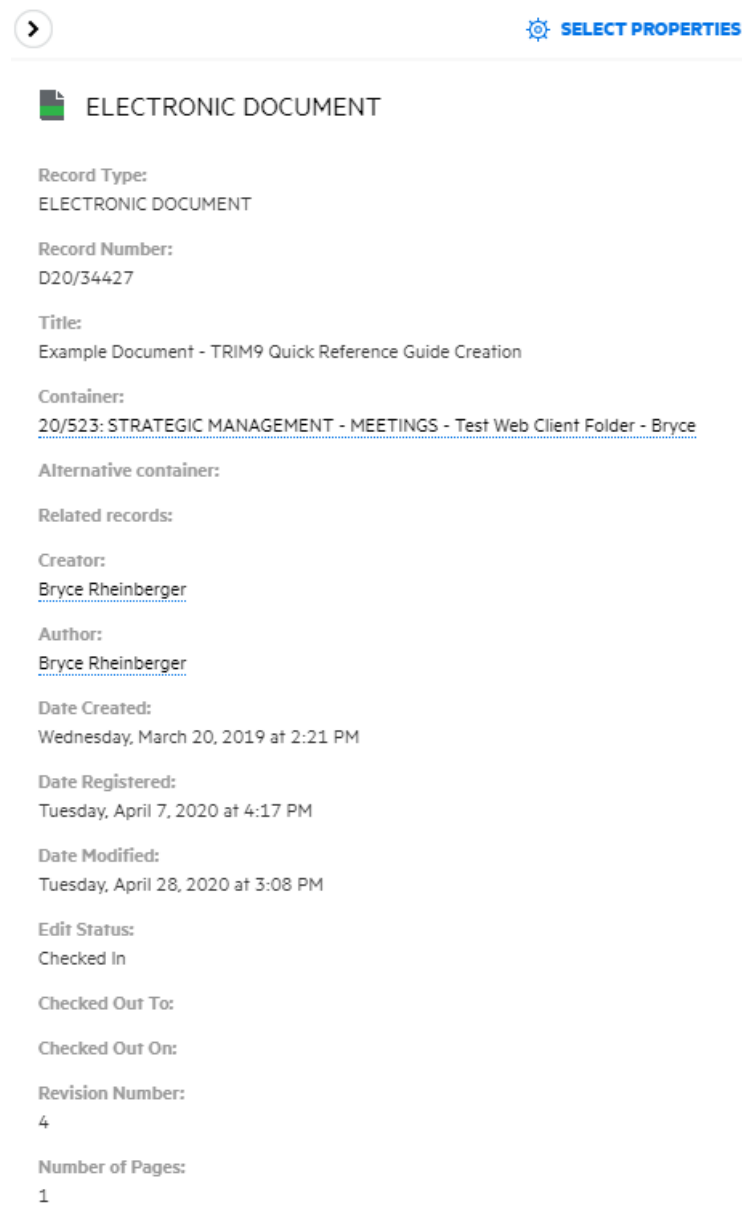
ASSIGNEE


In container '20/493 (Records Governance Services (RGS))' since Tuesday, April 7, 2020 at 4:17 PM


2. Click on the **Hide/show the Properties Panel** button on the right of the TRIM9 Web Client screen:



3. The **Properties Panel** will display (refer right):



 **SELECT PROPERTIES**

 **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.

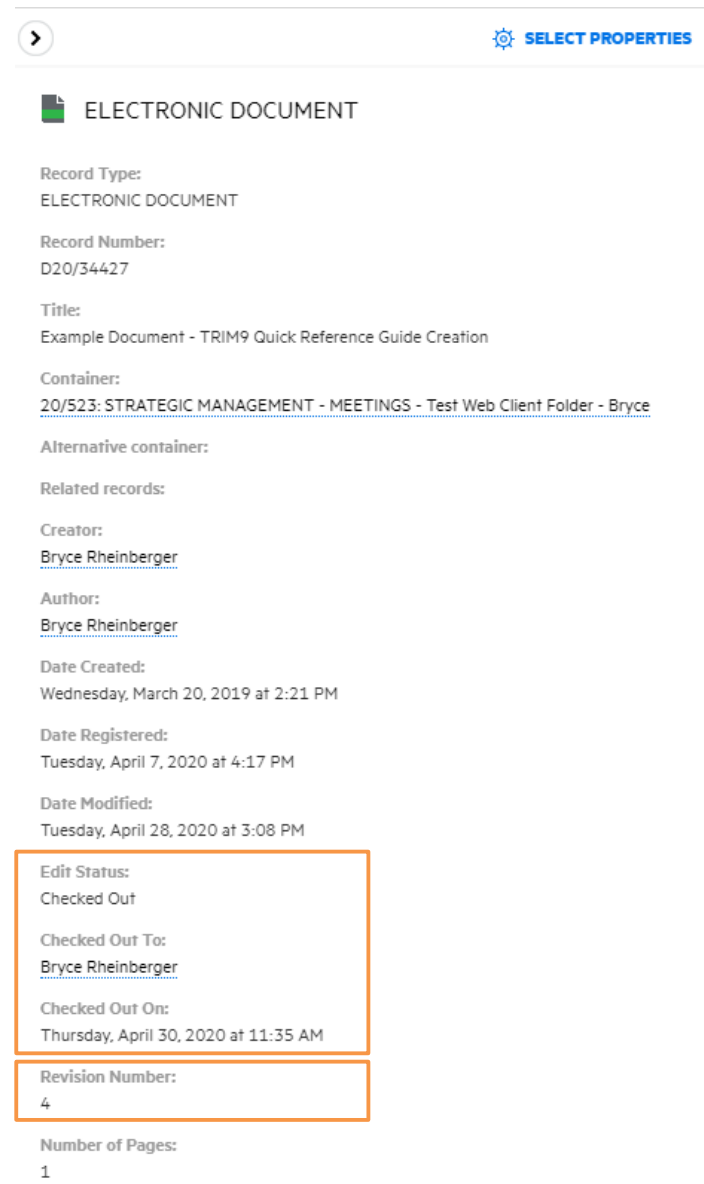
If the Edit Status shows **Checked Out** it means someone already has the record open for editing, and you will have to wait until they have finished editing and saved their changes back into TRIM9 before you can open and edit the document. **Checked Out To** and **Checked Out On** (directly below **Edit 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 TRIM9 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.



The screenshot shows the 'Properties Panel' for an 'ELECTRONIC DOCUMENT'. The panel includes fields for Record Type, Record Number, Title, Container, Alternative container, Related records, Creator, Author, Date Created, Date Registered, Date Modified, Edit Status, Checked Out To, Checked Out On, Revision Number, and Number of Pages. The 'Edit Status' is 'Checked Out', 'Checked Out To' is 'Bryce Rheinberger', 'Checked Out On' is 'Thursday, April 30, 2020 at 11:35 AM', 'Revision Number' is '4', and 'Number of Pages' is '1'. The 'Edit Status' field is highlighted with an orange border.

> [SELECT PROPERTIES](#)

 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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Checked Out To:  
[Bryce Rheinberger](#)

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Revision Number:  
4

Number of Pages:  
1