

Relating Records

Record Relationships are created to link records with related information together. This can help add context to a record; and makes it easier to find related information for a record in future.

Relationship Types

Related to : Creates a simple relationship between two or more records,

Copy of : Relates the copy of a document to the original,

Supersedes : Relates a document to the document it has superseded,

Attached to : Indicates that a particular document is an attachment to another document,

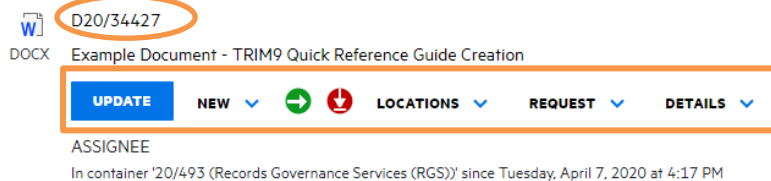
Alternatively within : Makes a particular document or folder appear within an alternative folder (although it doesn't actually reside in the alternative folder),

Redaction of : Indicates the document is a redaction of another document,

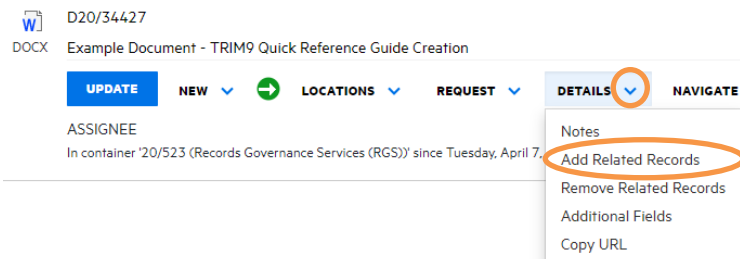
Reply to : Indicates the document is a reply to the related document.

Adding Record Relationships

1. Locate the record for which you want to add a relationship.
2. 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:

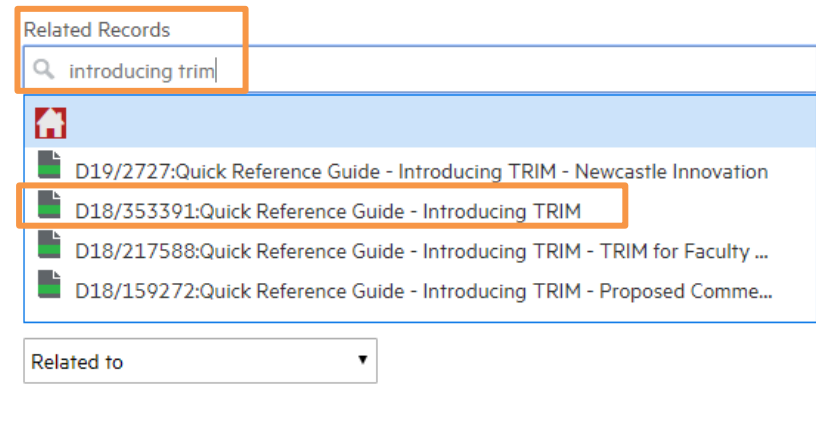


3. Click on the **DETAILS** drop-down, then select **Add Related Records**:



4. The **'ADD RELATED RECORDS'** window will appear. In the 'Related Records' field, type in the Record Number or keywords from the Title of the record you want to create the relationship with. Records matching your search criteria will appear below the 'Related Records' field. Locate and click on the record you want to create the relationship to:

ADD RELATED RECORDS



[SAVE](#) [CANCEL](#)

Hint: If searching by multiple keywords, you must type the words in the same order as which they appear in the Title of the record you're looking for.

5. Once you have selected the record you want to create the relationship to, the Record Number for that record will be populated in the 'Related Records' field:

ADD RELATED RECORDS



[SAVE](#) [CANCEL](#)

- Next, click on the **drop-down arrow** to select the type of relationship you would like to create between the records:

ADD RELATED RECORDS

Related Records

D18/353391

Related to

Related to

Copy of

Supersedes

Attached to

Alternatively within

Redaction of

Reply to

SAVE CANCEL

DATE REGISTERED

- Click the **SAVE** button to finish adding the record relationship:

ADD RELATED RECORDS

Related Records

D18/353391

Related to

SAVE CANCEL


- The **'UPDATE SUCCESSFUL'** pop up will appear briefly to show that the record relationship was added successfully:

D20/34427

DOCX Example Document - TRIM9 Quick Reference Guide Creation

UPDATE NEW LOCATIONS REQUEST DETAILS

UPDATE SUCCESSFUL

- Some related record information for any selected record is viewable in the **Properties Panel**. If you need to view this information, click on the **Hide/show the Properties Panel** button  on the right of the TRIM9 Web Client screen, and check to see if there is any related records listed under the 'Alternative container' or 'Related records' fields:

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

Alternative container:

Related records:
Related to: D18/353391: Quick Reference Guide - Introducing TRIM

Removing Record Relationships

If a record relationship has been created in error, or it is no longer appropriate for two records to be related, the record relationship can be removed.

- Locate the record which you want to remove a relationship from.
- 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:

D20/34427

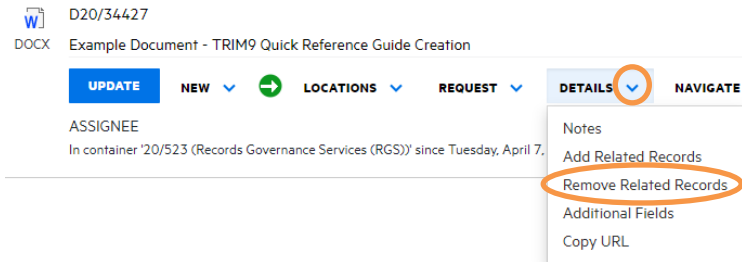
DOCX Example Document - TRIM9 Quick Reference Guide Creation

UPDATE NEW LOCATIONS REQUEST DETAILS

ASSIGNEE

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

3. Click on the **DETAILS** drop-down, then select **Remove Related Records**:



4. The **'REMOVE RELATED RECORDS'** window will appear:

REMOVE RELATED RECORDS

Relationship	Record Number	Record Title
<input type="checkbox"/> Related to	D18/353391	Quick Reference Guide - Introducing TRIM

REMOVE **CANCEL**

5. Place a tick in the checkbox next to the related record for which you want to remove the relationship, then select **REMOVE**:

REMOVE RELATED RECORDS

Relationship	Record Number	Record Title
<input checked="" type="checkbox"/> Related to	D18/353391	Quick Reference Guide - Introducing TRIM

REMOVE **CANCEL**

6. The **'UPDATE SUCCESSFUL'** pop up will appear briefly to show that the record relationship was removed successfully:

