

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Supersedes : Relates a document to the document it has superseded,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

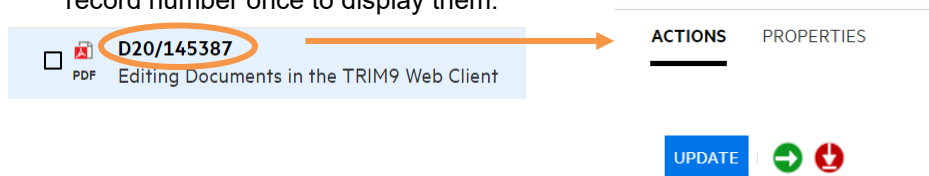
Redaction of : Indicates the document is a redaction of another document,

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

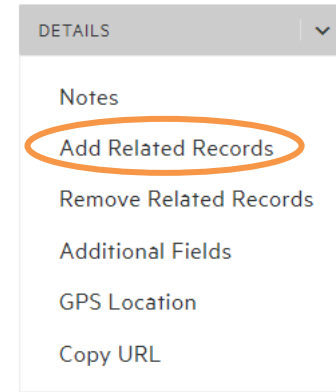
Annotation Of : Refers to adding explanatory notes to provide clarity or context about the record

Adding Record Relationships

1. Locate the record for which you want to add a relationship.
2. Ensure the options for the record such as ACTIONS, PROPERTIES, UPDATE etc. are displayed on the right-hand side of your screen. If not, click on the record number once to display them:

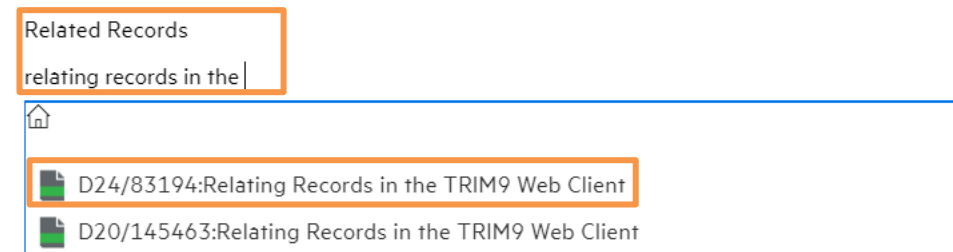


3. Click on **DETAILS** and from the drop-down, select **Add Related Records**:



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:

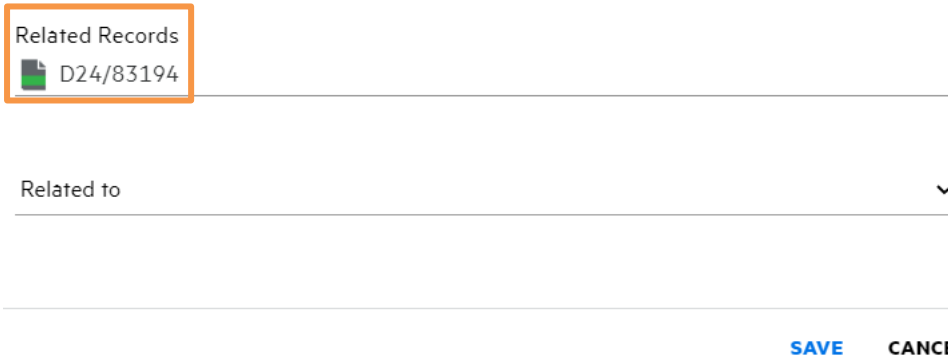
ADD RELATED RECORDS



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.

- 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

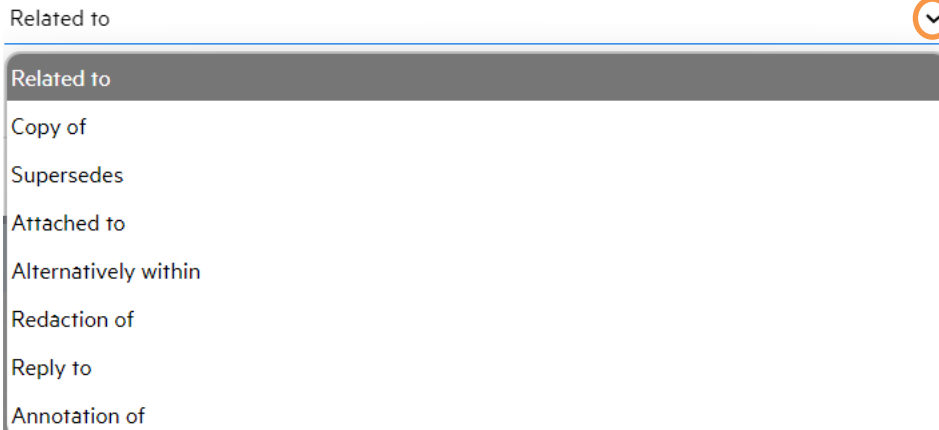


Related Records
D24/83194

Related to

SAVE CANCEL

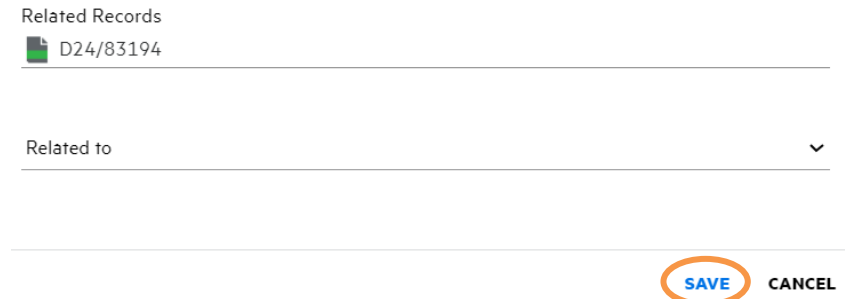
- Next, click on the **drop-down arrow** to select the type of relationship you would like to create between the records:



Related to

- Copy of
- Supersedes
- Attached to
- Alternatively within
- Redaction of
- Reply to
- Annotation of

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

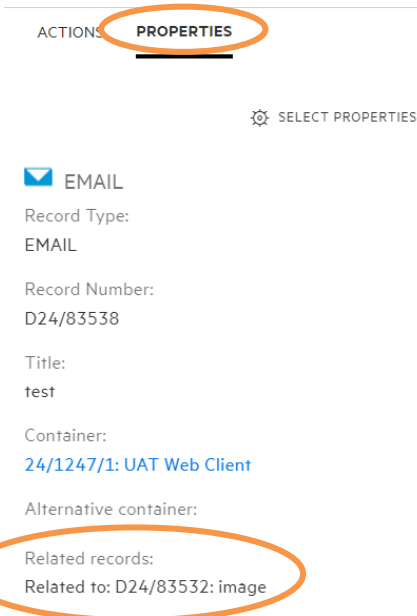


Related Records
D24/83194

Related to

SAVE CANCEL

- The **'UPDATE SUCCESSFUL'** pop up will appear briefly to show that the record relationship was added successfully at the bottom of the ACTIONS pane on the right-hand side of your screen.
- Some related record information for any selected record is viewable in the **Properties Panel**. If you need to view this information, click on **PROPERTIES** on the right-hand side of the TRIM Web Client screen, and check to see if there is any related records listed under the 'Alternative container' or 'Related records' fields:



ACTIONS: **PROPERTIES**

SELECT PROPERTIES

EMAIL

Record Type:
EMAIL

Record Number:
D24/83538

Title:
test

Container:
24/1247/1: UAT Web Client

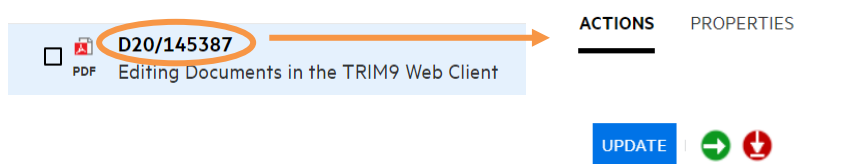
Alternative container:

Related records:
Related to: D24/83532: image

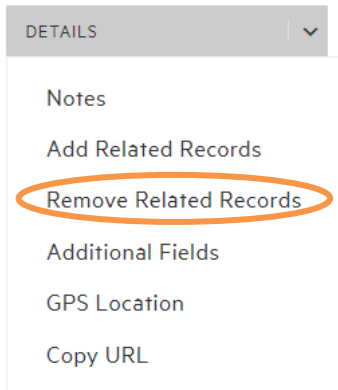
Removing Record Relationships

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.

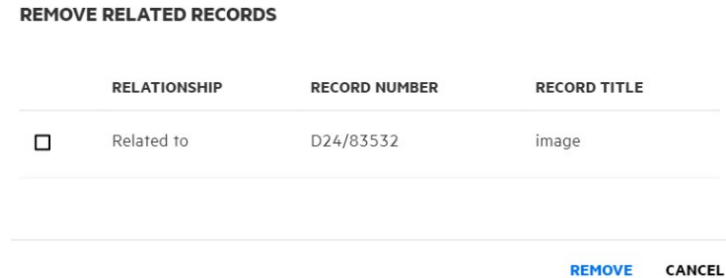
1. Locate the record which you want to remove a relationship from.
2. Ensure the options for the record such as ACTIONS, PROPERTIES, UPDATE etc. are displayed on the right-hand side of your screen. If not, click on the record number once to display them:



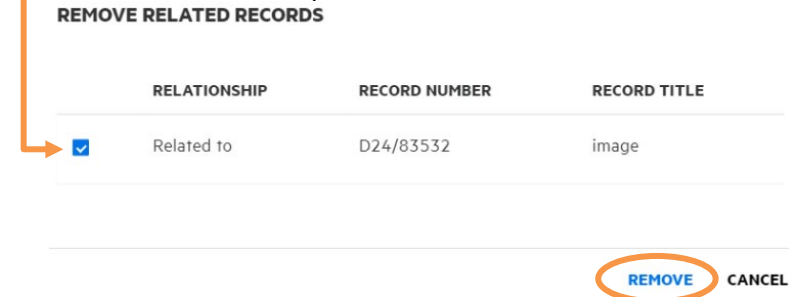
3. Click on the **DETAILS** drop-down, then select **Remove Related Records**:



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



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



6. The **'UPDATE SUCCESSFUL'** pop up will appear briefly to show that the record relationship was removed successfully at the bottom of the ACTIONS pane on the right-hand side of your screen.