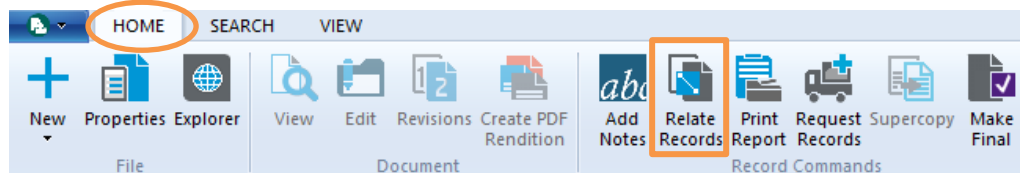


## Relating Records

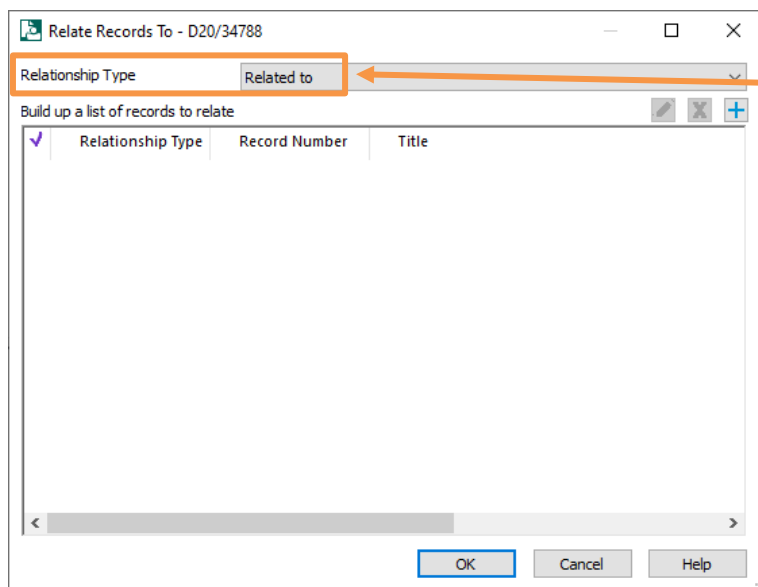
Record Relationships are created to link records with related information together. This can help add context to a record; and makes it easier to find related information for a record in future.

## Adding Record Relationships

1. Locate the record for which you want to add a relationship and click on it once to select it.
2. Select the **HOME** tab, then select the **Relate Records** button:

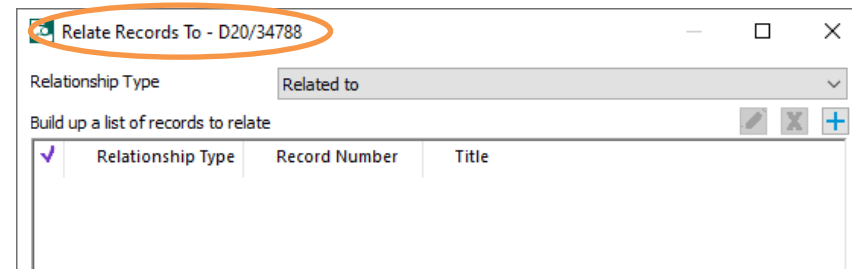


3. The 'Relate Records To' window will appear:



**Note:** By default, the 'Relationship Type' field will be populated with the **Related to** relationship. However, if you have created a record relationship previously, TRIM9 will instead automatically populate this field with the relationship type you used last time.

4. Notice how the record number for the record you have already selected appears at the top of the window



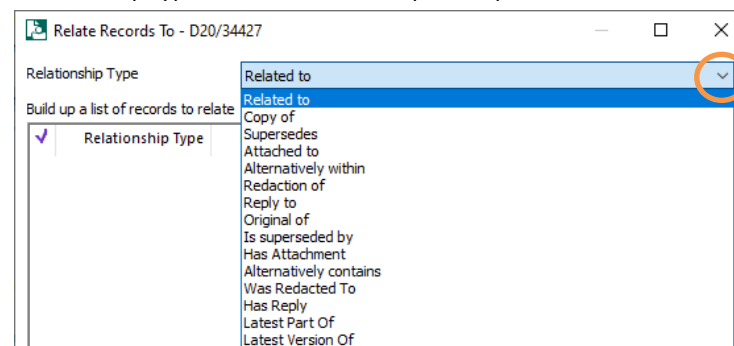
**Hint:** If you need to select a relationship type other than the general 'Related to', then the below formula can assist in determining which relationship type to select:

{Record Already Selected} - {Relationship Type} - {Related Record to be Added in Step 6}

E.g. D20/34788 - **Reply to** - {Related Record to be Added in Step 6}

**I.e.** In the above example, if the formula reads incorrectly then you would change the relationship type to **Has Reply**.

5. If the 'Relationship Type' field is not already populated with the type of relationship you would like to create, click the **drop-down arrow** to display all available relationship types, and select the required option:



**Hint:** A brief description of all the available relationship types is provided on the following page. Some relationship types are the opposite of others (e.g. 'Supersedes' is the opposite of 'Is superseded by'). In those scenarios the formula detailed in **Step 4** above will help you determine the correct relationship type to select.

## 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 record is an attachment to another record,

**Alternatively within** : Makes a particular record appear within an alternative container (although it doesn't actually reside in the alternative container),

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

**Reply to** : Indicates the record is a reply to the related record,

**Original of** : Sets the document to be the original of another document,

**Is superseded by** : Relates a superseded document to the document which superseded it,

**Has Attachment** : Indicates that a record has an attachment, which is the related record,

**Alternatively contains** : Makes a particular container display the related record inside of it (although the related record doesn't actually reside in the alternative container),

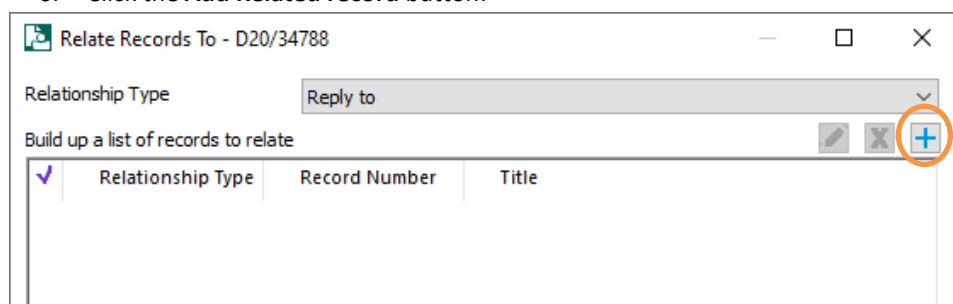
**Was Redacted To** : Indicates the document was redacted to be another document, which is the related record,

**Has Reply** : Indicates the record has a reply, which is the related record,

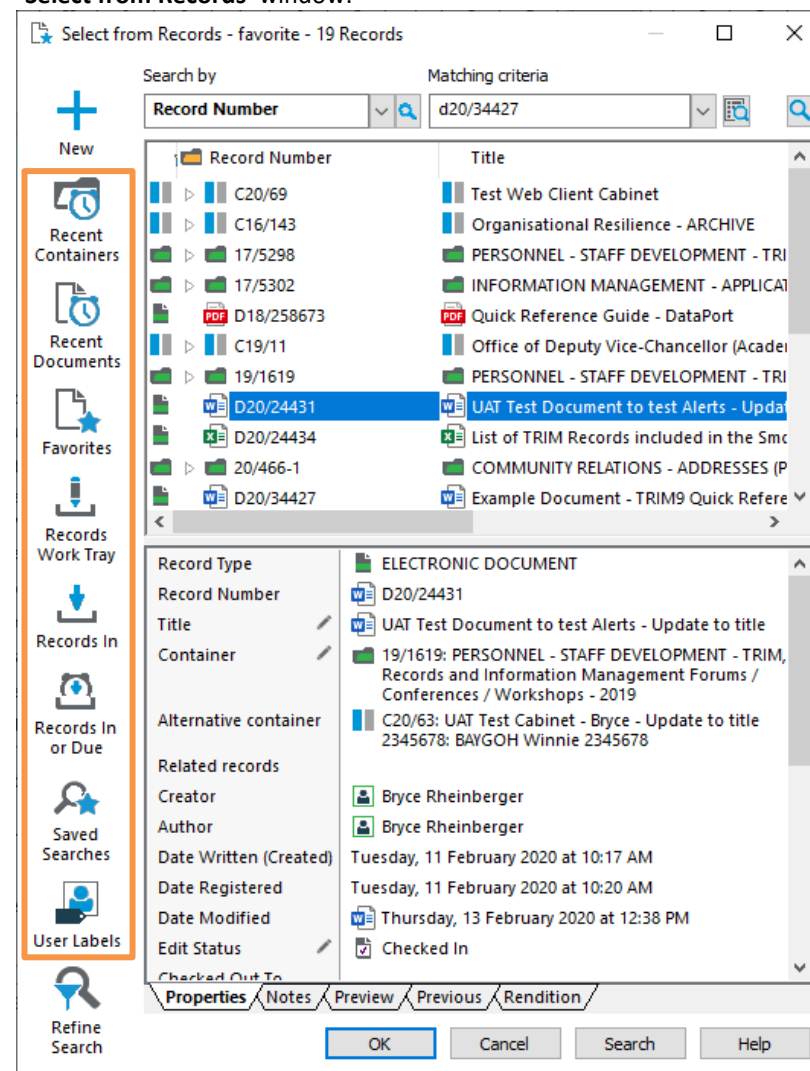
**Latest Part Of** : Indicates a record is the next part of another record that consists of parts,

**Latest Version Of** : Sets the document as the latest version of another document.

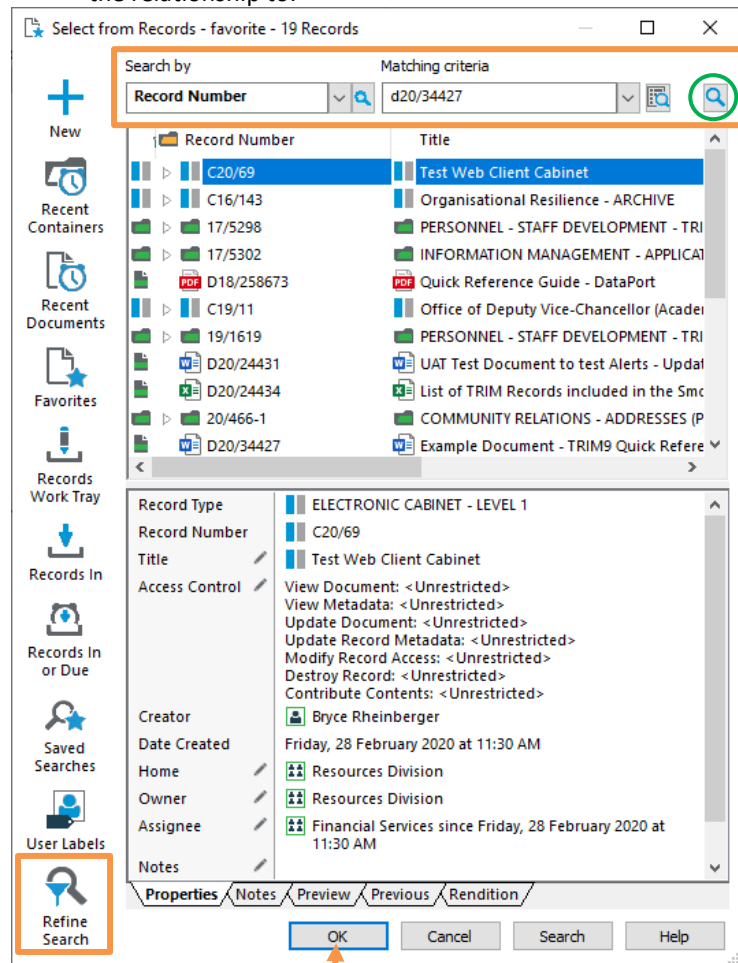
6. Click the **Add Related record** button:



7. The **'Select from Records'** window will appear, and by default your Favorite records will be displayed. The record which you want to create the relationship to may be easily located in your Favorites or one of the other **Shortcuts** on the left of the **'Select from Records'** window:



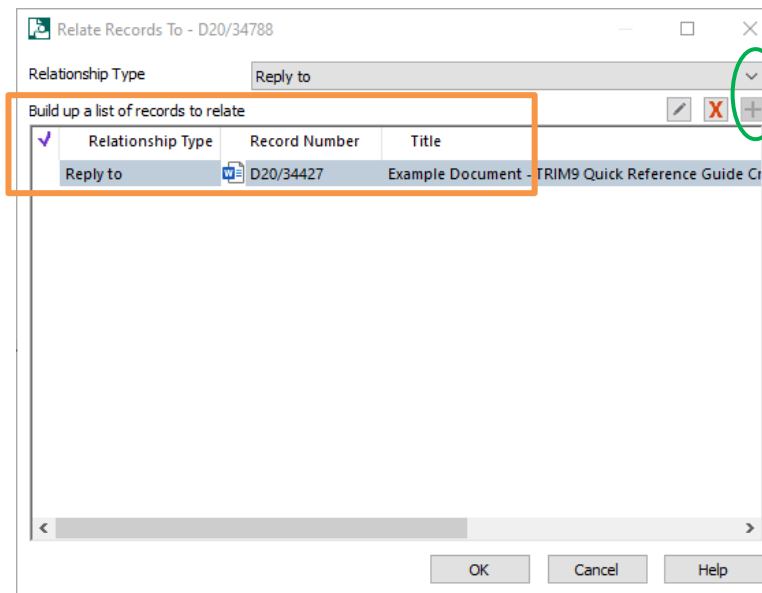
Otherwise, you will need to use the **Quick Search** area or **Refine Search** button search options in this window to search for and locate the record you want to create the relationship to:



**Hint:** If running a quick search in this window, use the **Run the search** magnifying glass button to execute the search, as pressing **Enter** on the keyboard whilst in this window won't run the search, but will instead add the highlighted record as a related record.

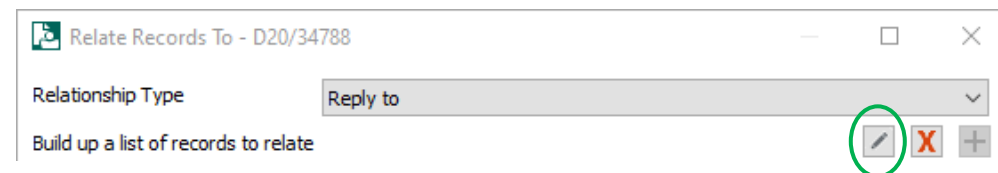
Once you have located the correct record, click on it once to highlight it, then click the **OK** button to add the related record.

8. You will now see the record you have just added listed in the **Build up a list of records to relate** section:

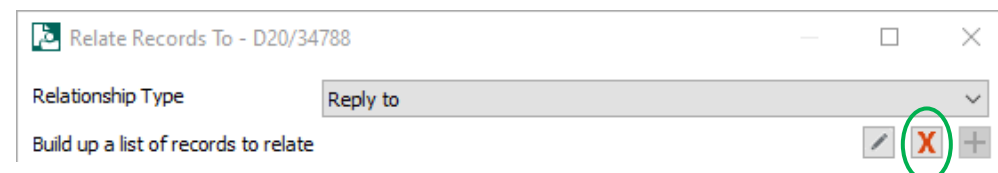


**Hint:** If you need to add another related record, you can do this by using the 'Relationship Type' **drop-down arrow** to select a different relationship type, and then clicking the **Add Related record** button again.

**Hint:** The **Display Properties** button allows you to change the relationship type for any selected record in the **Build up a list of records to relate** section:



**Hint:** The **Remove Related record** button allows you to remove any selected record from the **Build up a list of records to relate** section:



9. Once you are ready create the record relationship(s), click **OK** to save your changes:

Relate Records To - D20/34788

Relationship Type: Reply to

Build up a list of records to relate

Relationship Type	Record Number	Title
Reply to	D20/34427	Example Document - TRIM9 Quick Reference Guide Cr

OK Cancel Help

## Viewing Related Record Information

- The **'Related records'** field in the **View Pane** will display the record relationships for the currently selected record.
- However, if the currently selected record is 'Alternatively within' another folder, this relationship will be displayed in the **'Alternative container'** field.

Records - Empty list - No Rec... | Records - number:d20/34427 ... | Records - contains:D20/3442...

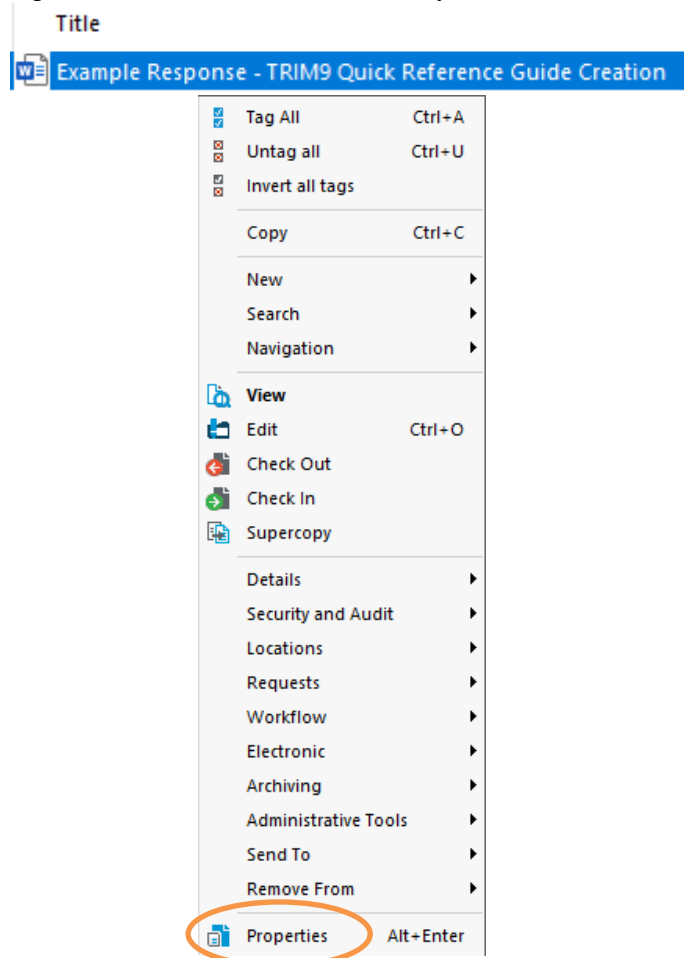
Record Number	Title
20/516	INFORMATION MANAGEMENT - IMPLEMENTATION - TRIM9 Upgrade
D20/34788	Example Response - TRIM9 Quick Reference Guide Creation
D20/34775	Example Document - TRIM9 Quick Reference Guide Creation
D20/34651	Test Document - TRIM9 Upgrade

Record Type	ELECTRONIC DOCUMENT
Record Number	D20/34788
Title	Example Response - TRIM9 Quick Reference Guide Creation
Container	20/516: INFORMATION MANAGEMENT - IMPLEMENTATION - TRIM9 Upgrade
Alternative container	20/493: INFORMATION MANAGEMENT - IMPLEMENTATION - Test Folder
Related records	Reply to: D20/34427: Example Document - TRIM9 Quick Reference Guide Creation

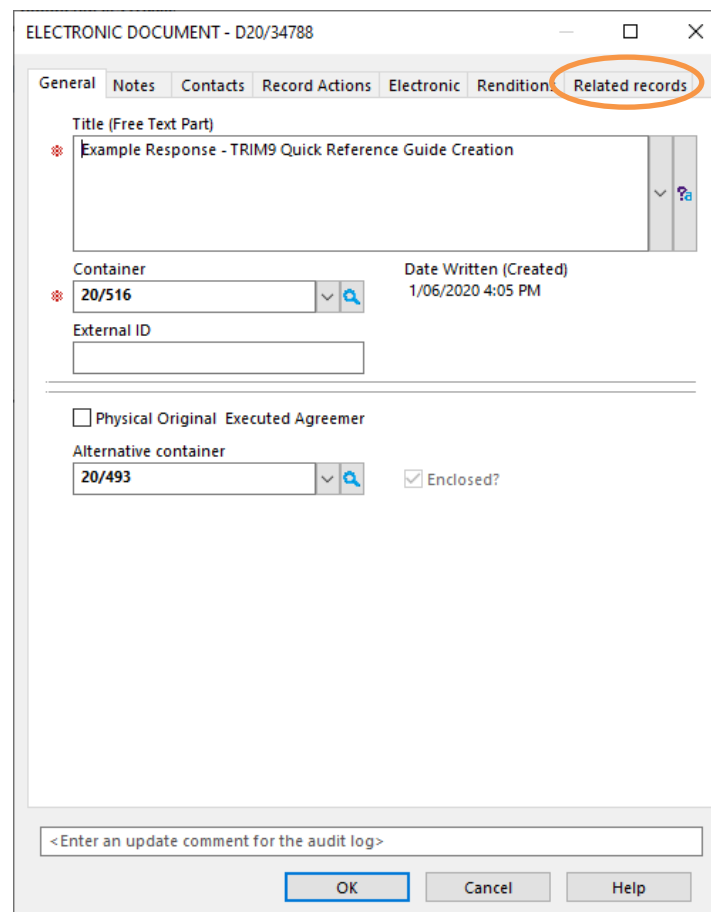
## Removing Record Relationships

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.

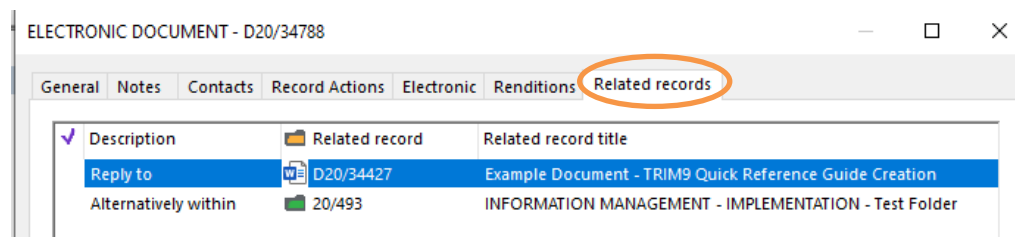
1. Locate the record which you want to remove a relationship from.
2. Right-click on the record and select **Properties**:



3. The **Record Entry Form** for that record will appear. Open the **'Related records'** tab:

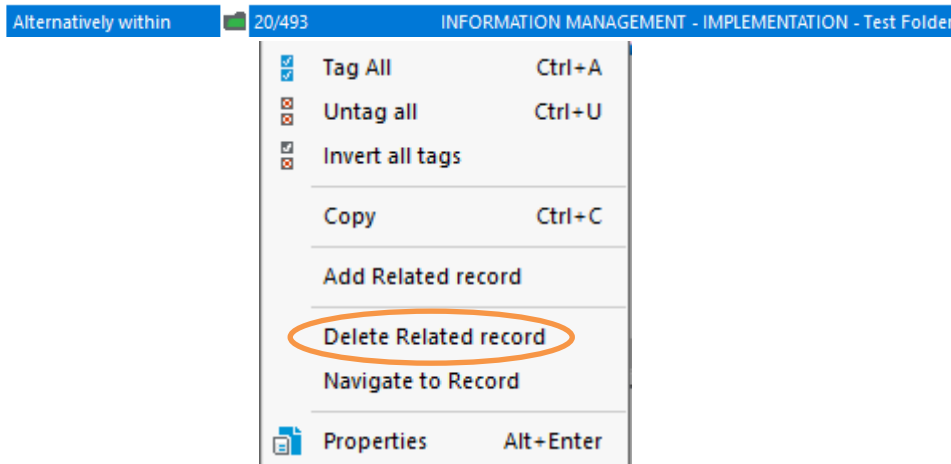


The screenshot shows the "ELECTRONIC DOCUMENT - D20/34788" record entry form. The "Related records" tab is selected and circled in red. The form includes fields for Title (Free Text Part), Container, Date Written (Created), External ID, Physical Original, Executed Agreemer, Alternative container, and Enclosed?.

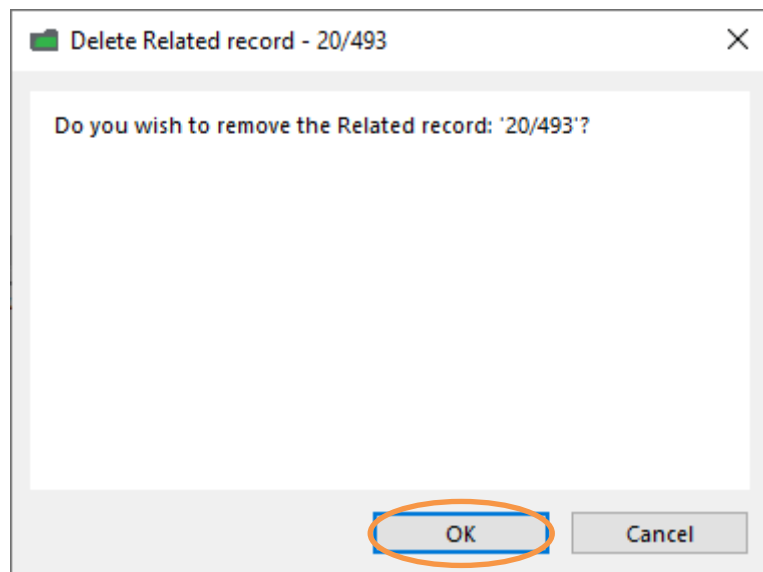


Description	Related record	Related record title
✓ Reply to	D20/34427	Example Document - TRIM9 Quick Reference Guide Creation
Alternatively within	20/493	INFORMATION MANAGEMENT - IMPLEMENTATION - Test Folder

- Right-click on the record relationship you want to remove, and select **Delete Related record**:



- You will be asked to confirm that you want to remove the related record. Select **OK**:



- Once you have finished removing all the record relationships you need to, click **OK** to close the record **'Properties'** window:

