

Introducing TRIM9 - Content Manager

TRIM9 - Content Manager 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 - Content Manager 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 TRIM9 - Content Manager

Information about how to request access to TRIM9 can be found on the ['ABOUT TRIM'](#) page of the University of Newcastle website.

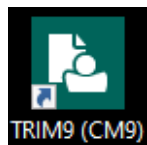
How to Get TRIM9 - Content Manager Installed on your Computer

For new TRIM9 users, the Records Governance Services team will organise for TRIM9 to be installed on your computer as part of setting up your TRIM9 access.

If you are a current TRIM9 user and require TRIM9 to be installed on an additional computer, you can contact the IT Service Desk directly to request this.

Getting Started

You can open TRIM9 by double clicking the **TRIM9 (CM9)** icon on your desktop:



If the **TRIM9 (CM9)** icon isn't on your desktop, you can locate it by clicking on the Windows **Start** button at the bottom left of your computer screen and navigating to the 'TRIM9 (CM9)' folder.

Support

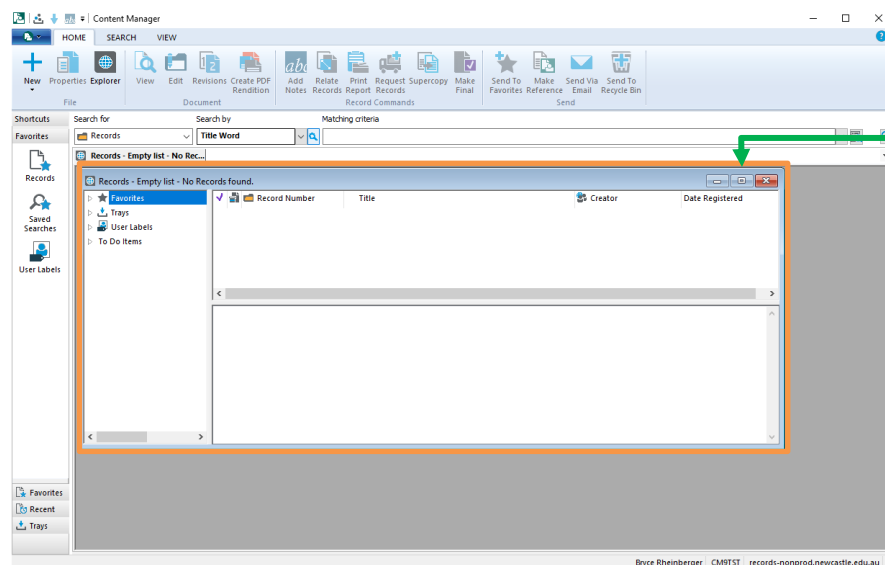
Records Governance Services

Phone: 492 15306

Email: records@newcastle.edu.au

How to Maximise TRIM9 Windows

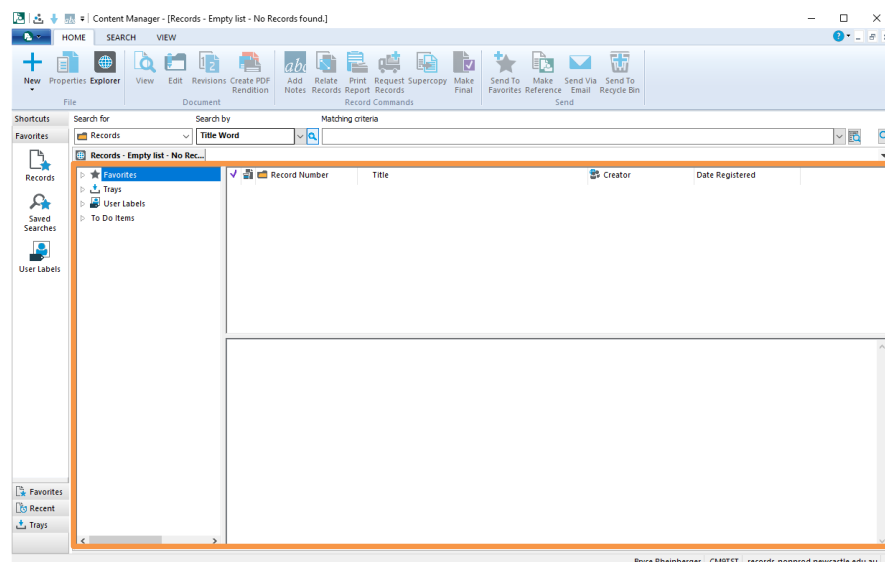
When you open TRIM9 your TRIM9 windows will not be maximised, meaning each window won't be using the maximum space it can:



Hint: It is recommended to click the **Maximise** button



on the current window to increase the size of your TRIM9 windows, meaning when navigating and working within TRIM9 the information on screen will have more space to display within. When you use the **Maximise** button, the change will apply to any window you currently have open, and any new windows you open during your current TRIM9 session.



TRIM9 Explorer

When you open TRIM9 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.

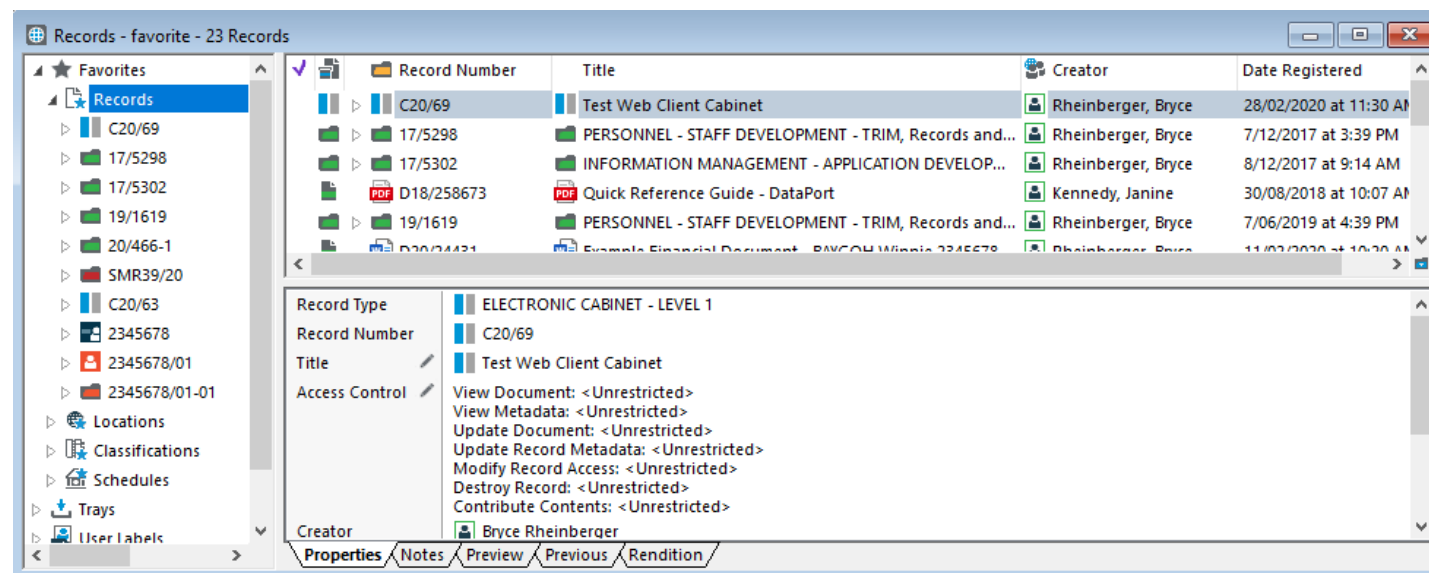
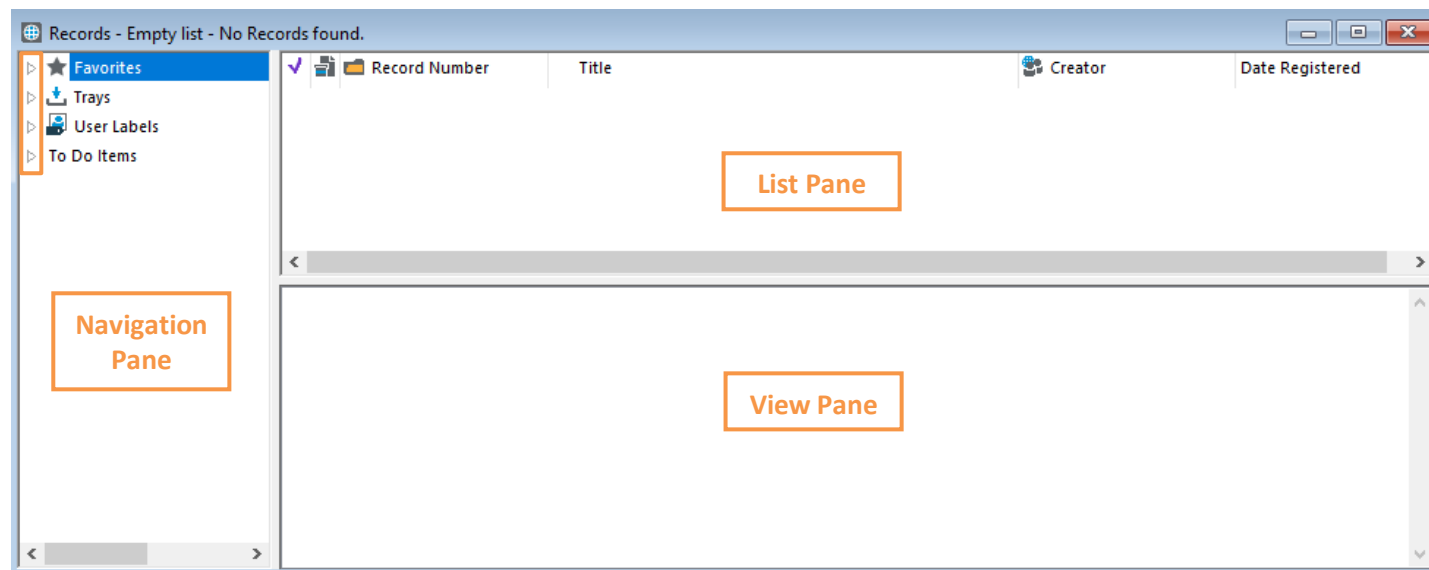
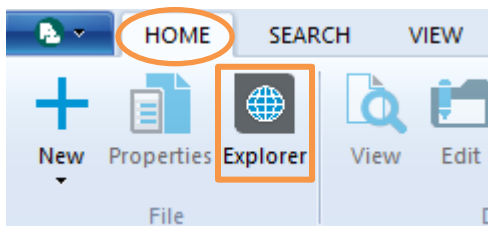
The **'Explorer'** window consists of three panes:

Navigation Pane – Displays and allows you to navigate the hierarchical structure. Use the white triangle ▶ to the left of an item in the Navigation Pane to display its contents. Use the black ◼ triangle 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.

View Pane – Displays information about the record which is currently selected in the List Pane.

You can return to the **'Explorer'** window at any time by selecting the **HOME** tab, then clicking the **Explorer** button:



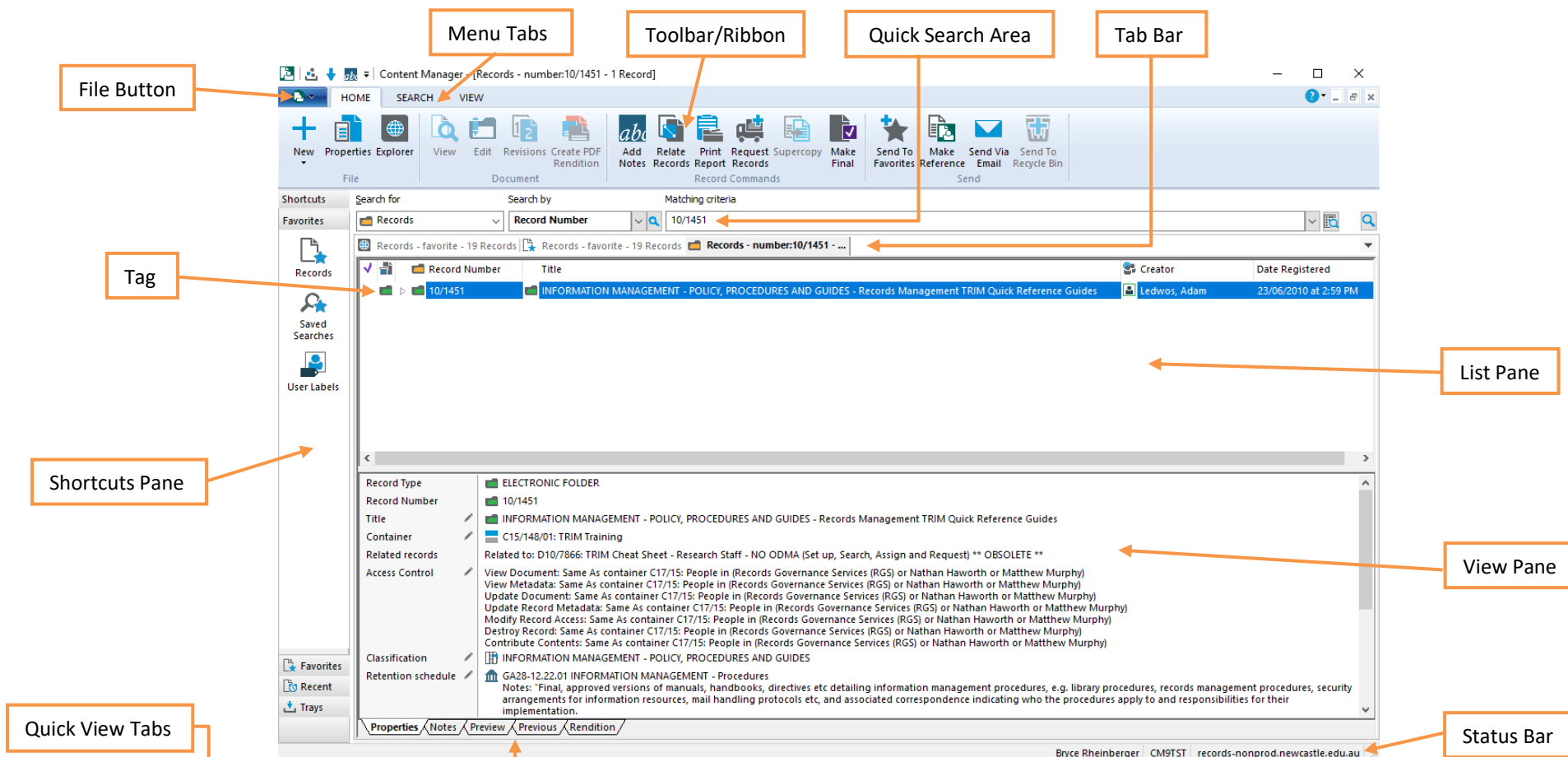
Quick Reference Guide – An Introduction to TRIM9, the Explorer Window and Shortcuts

Understanding the TRIM9 Screen

The TRIM9 screen is divided into eleven sections:

- **File Button** – Area where TRIM9 options and integrations can be configured
- **Menu Tabs** – When selected will each display different buttons according to their title
- **Toolbar/Ribbon** – Series of icons/buttons that link to TRIM9 functions
- **Quick Search Area** – Perform simple searches with one field at a time
- **Tab Bar** – Quick link to all the windows you currently have open
- **List Pane** – Lists all your records and locations as a result of your search (search results)
- **View Pane** – Displays information about the currently selected record (information displayed is dependent on which **Quick View tab** is selected)

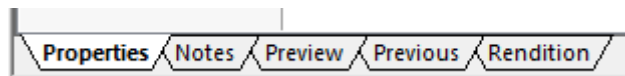
- **Status Bar** – Shows the logged-in user, the TRIM9 dataset name, and the server name
- **Quick View Tabs** – View properties (metadata) of selected record, view notes attached to the selected record, preview the current revision of the selected record, and view the previous revision of the selected record
- **Shortcuts Pane** – View frequently accessed records, folders and locations
- **Tag** – Allows you to select (tag) multiple items and apply the same function to them. E.g. tag certain records and move them from one container to another at the same time



The screenshot shows the TRIM9 interface with the following sections labeled:

- File Button**: Located at the top left, next to the 'HOME' tab.
- Menu Tabs**: Located at the top, including 'HOME', 'SEARCH', and 'VIEW'.
- Toolbar/Ribbon**: A series of icons and buttons for various functions like 'New', 'Properties', 'Explorer', 'View', 'Edit', 'Revisions', 'Create PDF', 'Add Notes', 'Relate', 'Print', 'Request', 'Supercopy', 'Make Final', 'Send To Favorites', 'Make Reference', 'Send Via Email', and 'Send To Recycle Bin'.
- Quick Search Area**: A search bar with a dropdown menu for 'Search by' and a search field containing '10/1451'.
- Tab Bar**: A bar at the top right showing open windows, including 'Records - number:10/1451 - 1 Record'.
- Tag**: A button in the left sidebar for tagging records.
- Shortcuts Pane**: A sidebar on the left with icons for 'Records', 'Saved Searches', and 'User Labels'.
- List Pane**: A table displaying search results with columns for 'Record Number', 'Title', 'Creator', and 'Date Registered'. The selected record is '10/1451' with the title 'INFORMATION MANAGEMENT - POLICY, PROCEDURES AND GUIDES - Records Management TRIM Quick Reference Guides'.
- View Pane**: A large area on the right displaying detailed information about the selected record, including 'Record Type', 'Record Number', 'Title', 'Container', 'Related records', 'Access Control', 'Classification', and 'Retention schedule'.
- Quick View Tabs**: Tabs at the bottom of the View Pane labeled 'Properties', 'Notes', 'Preview', 'Previous', and 'Revision'.
- Status Bar**: A bar at the very bottom showing the user 'Bryce Rheinberger', the dataset 'CM9TST', and the server 'records-nonprod.newcastle.edu.au'.

Quick View



Properties – View information about the selected record (metadata)

Notes – View the notes of the selected record

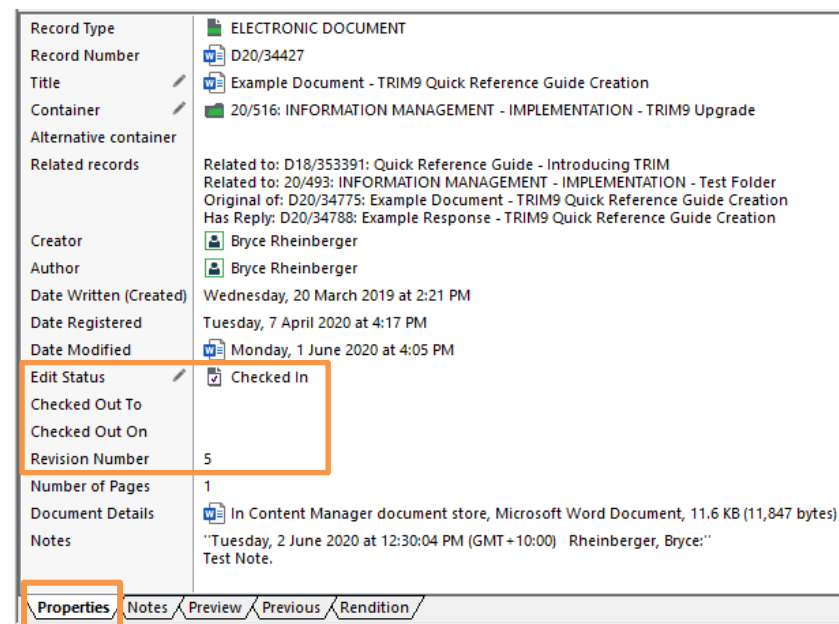
Preview – Preview the current revision of the selected record

Previous – Preview the previous revision of the selected record

Rendition – Preview the most recently added rendition of the selected record

View Pane

When a document is selected in the **List Pane**, information about the record (metadata) will be displayed in the **View Pane**, as demonstrated below:



Note: Different record types will display different metadata fields in the **View Pane**.

Edit Status

The Edit Status of a document appears in the **View Pane** (refer screenshot below left).

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

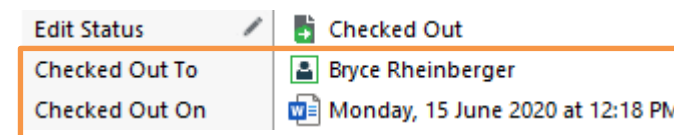
If the 'Edit Status' field shows **Checked Out** it means someone already has the record open for editing, and you will have to wait until they have finished editing and saved their changes back into TRIM9 before you can open and edit the document.

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

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

Checked Out To & Checked Out On

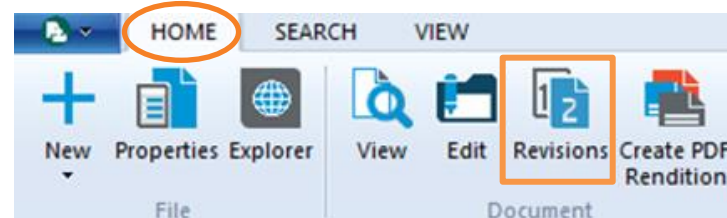
If a record is currently checked out, the 'Checked Out To' field (directly below 'Edit Status' in the **View Pane**) will tell you who has the record checked out. The 'Checked Out On' field will tell you when the record was checked out.



Revision Number

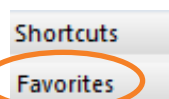
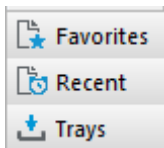
When you view a record from the **List Pane** in TRIM9 you are viewing the current revision. You can see how many revisions a record has by checking the number listed next to 'Revision Number' in the **View Pane** (refer left). Every time a record is updated a new revision is saved over the top of the previous revision, and the Revision Number increases by one.

Hint: To view previous revisions for a record, click the **HOME** tab then select the **Revisions** button:



Shortcuts Pane

The **Shortcuts Pane** is comprised of three tabs; **Favorites**, **Recent** and **Trays**. At the bottom left of the TRIM9 screen is where you can select between these three tabs:



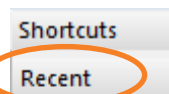
Favorites

Provides a shortcut to your favourite /regularly used records and saved searches.

To send an item to your Favorite Records or Favorite Saved Searches, right-click on the item in the **List Pane** → **Send To** → **Favorites** (alternatively you can click on an item once, then select the **HOME** tab at the top left of the TRIM9 screen and then select the **Send To Favorites** button in the Toolbar:



To remove an item from your Favorites, right-click on the item in the **List Pane** → **Remove From** → **Remove from Favorites**

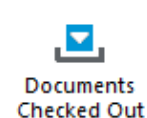
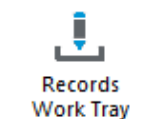
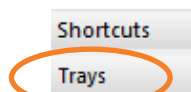


Recent

- Recent Containers
- Recent Documents

Recent Containers is automatically populated with the 25 most recent containers you create or add a record to.

Recent Documents is automatically populated with the 25 most recent documents you create or edit.



Trays

A couple of helpful categories within the **Trays** Shortcut are **Records Work Tray** and **Dashboard**.

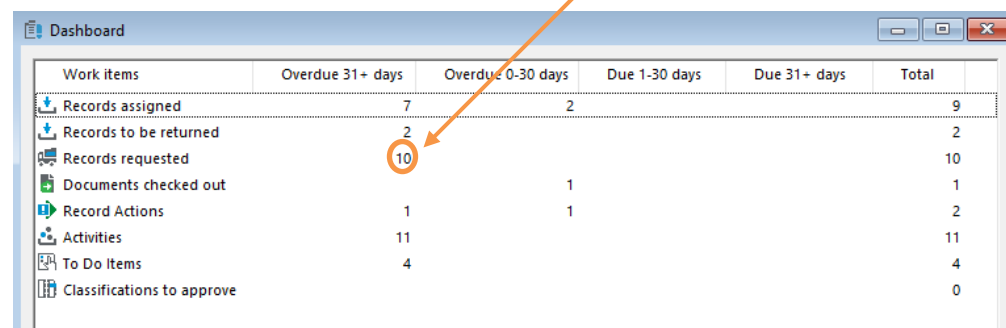
Think of **Records Work Tray** as like a temporary Favorites. Any open matter/file/case etc. can be stored here until you have finished with it.

To place a record in your Records Work Tray, right-click on the item in the **List Pane** → **Send To** → **Add To Records Work Tray** (alternatively you can click once on the item and press **F3** on the keyboard).

To remove an item from your Records Work Tray, right-click on the item in the **List Pane** → **Remove From** → **Remove Record from Records Work Tray**

The TRIM9 **Dashboard** allows you to access a pre-defined breakdown of outstanding work tasks including a total number of items and a breakdown of tasks within set time periods. Dashboard is particularly useful if you are involved in any TRIM9 Workflow or Action Tracking processes.

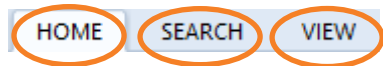
You can double-click directly on the **count numbers** to easily navigate to those particular records in TRIM9:



| Work items | Overdue 31+ days | Overdue 0-30 days | Due 1-30 days | Due 31+ days | Total |
|----------------------------|------------------|-------------------|---------------|--------------|-------|
| Records assigned | 7 | 2 | | | 9 |
| Records to be returned | 2 | | | | 2 |
| Records requested | 10 | | | | 10 |
| Documents checked out | | 1 | | | 1 |
| Record Actions | 1 | 1 | | | 2 |
| Activities | 11 | | | | 11 |
| To Do Items | 4 | | | | 4 |
| Classifications to approve | | | | | 0 |

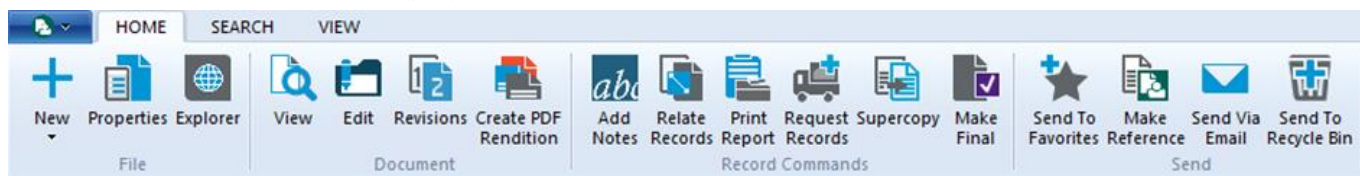
Toolbar/Ribbon and Navigation Tips

The Toolbar comprises three default tabs; **HOME**, **SEARCH** and **VIEW**. Clicking on a tab once will display its buttons:



HOME Tab

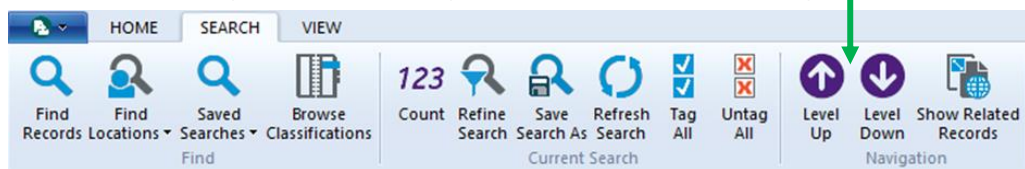
Includes all primary functions you might perform on a selected record:



Hint: As an alternative to the Level Up and Level Down buttons when navigating; the white and black triangles to the left of a record will hide and display its contents (but **doesn't open a new window**). This therefore allows you to view records and navigate hierarchical structures with context. Use the white triangle ► to the left of a record to display its contents. Use the black triangle ◀ to the left of a record to hide its contents.

SEARCH Tab

Includes all searching functions and navigational tasks related to searching:

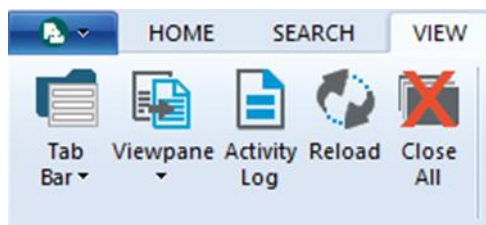


Hint: The **Level Up** and **Level Down** buttons on the **SEARCH** tab are a very useful tool for navigating TRIM9.

Level Up – Displays the container that the selected record is in. E.g. if you currently have a document selected, clicking **Level Up** will **open a new window** and display the folder or sub-folder that document is in.

Level Down – Displays the contents of the selected container. E.g. if you currently have a folder selected, clicking **Level Down** will **open a new window** and display the contents of that folder.

VIEW Tab:



Hint:

Tab Bar – Allows you to choose whether to display the **Tab Bar** at the top or bottom of the screen. Also allows you to choose how you want to navigate through the open tabs when the page limit of tabs is reached (E.g. **Top** will use forward and back buttons, whereas **Top with menu** utilises a drop-down list).

Viewpane – Allows you to choose if you would like to display the **View Pane** at the bottom (default) or right of the screen.

Close All – Closes all windows you currently have open.

