

Introduction

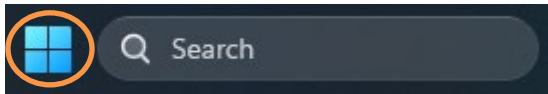
The purpose of this guide is to detail how to save and manage Oral Examination (VIVA) records in TRIM. For additional information/guidance on VIVAs please refer to the [Oral Examination \(VIVA\) Procedure](#).

Records Governance Services (RGS) recommends using Zoom to record VIVAs as this will save your recording in MP4 format which is open source and has a high amount of compression, meaning reliable access to these records into the future and smaller file sizes.

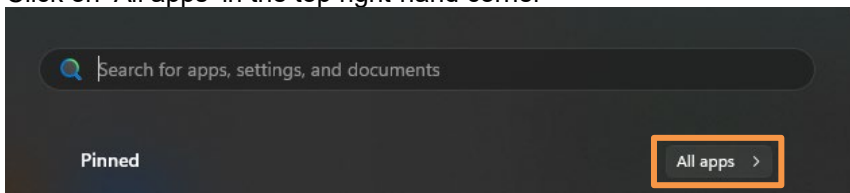
The instructions on page 1 to 3 of this guide primarily pertain to the staff who will be conducting and recording the VIVAs. The arrangement for this may change from School to School, for example, some Schools may have the academics / course coordinators schedule and conduct the VIVAs, whilst other Schools may choose to have administrative staff schedule the VIVA meetings on behalf of the academic staff. This second arrangement would allow administrative staff to pre-set the required Zoom meeting settings such as video turned on by default and automatic recording of the meeting to the Cloud.

Recording VIVAs using Zoom

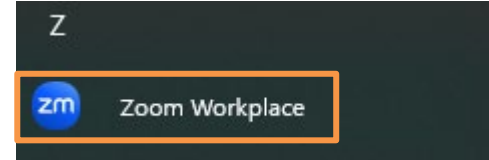
1. Click on the Windows **Start button**:



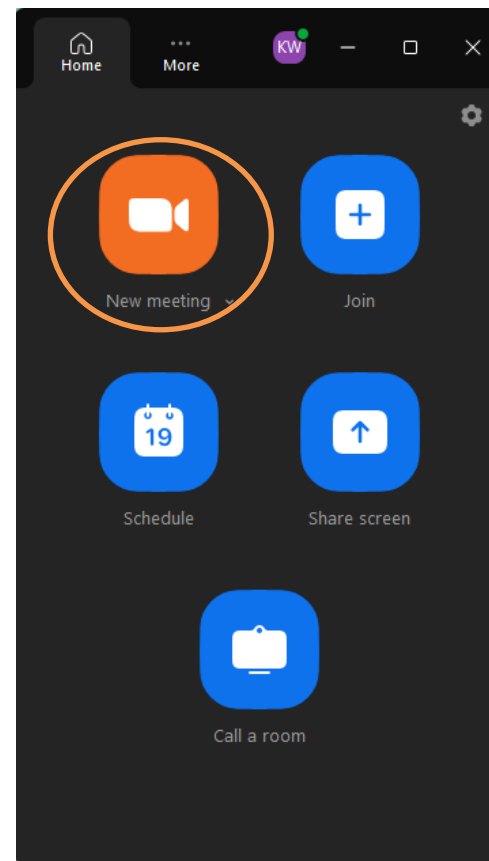
2. Click on 'All apps' in the top right-hand corner



3. Scroll down to 'Z' and click on the **Zoom** application



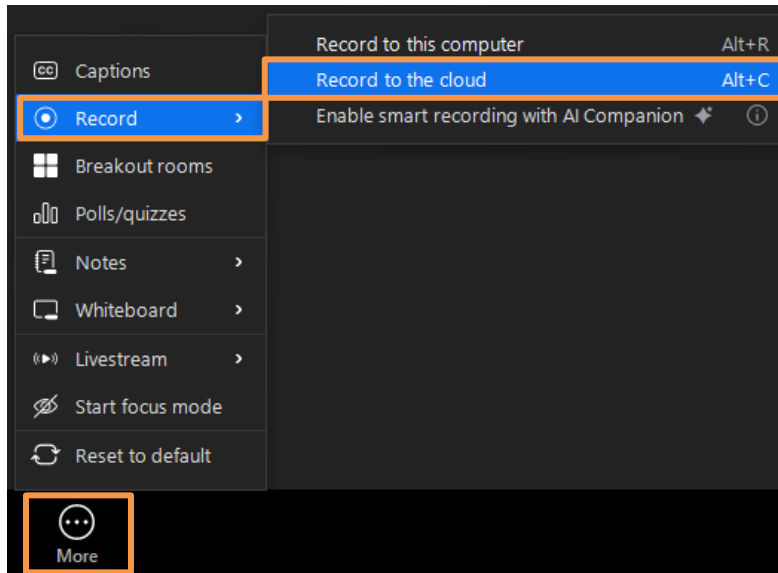
4. The below 'Zoom' window will open. Select the **New Meeting camera icon**:



- When you are ready to begin the recording, ensure video is turned on. If not, turn it on by clicking the **Start Video** button at the bottom of the 'Zoom Meeting' window, and ensure the camera is facing the student:



- Click **More** at the bottom of the 'Zoom Meeting' window and select **Record**. Select **Record to Cloud** to save the recording to the Cloud, and you can then commence the VIVA:



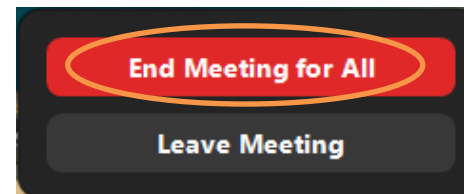
Note:

- The recording will save to the Zoom Cloud, and you will receive an email shortly after the meeting is ended containing links to the recording of the meeting in the Cloud.

- Once the VIVA is complete, click the **End** button at the bottom right of the 'Zoom Meeting' window:



- Click **End Meeting for All**:



Accessing / Sharing and Downloading the Recording

- The next step is to ensure the recording is available to the staff member(s) who are required to save it to TRIM. Depending on your School's local processes this step may differ from School to School.

As mentioned in the previous section at Step 7, the recording should be saved to the Cloud, and shortly after the meeting has ended the meeting organiser will receive an email from Zoom which contains links to the recording of the meeting in the Cloud. If the recipient of this email isn't the person responsible for putting the VIVA recording into TRIM then the email will need to be forwarded onto the appropriate staff who have responsibility for this task.

- Click on the appropriate link in the email (if you were the meeting host click on the **first link**, if the email has been shared with you click on the **second link**):

For host only, click here to view your recording (Viewers cannot access this page):
https://uonewcastle.zoom.us/recording/detail?meeting_id=8yeeZdxIQ%2B0Ix4XBSQ1gGg%3D%3D

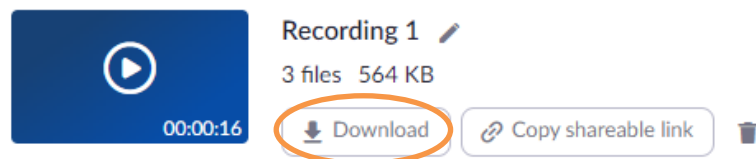
Share recording with viewers:
https://uonewcastle.zoom.us/rec/share/eh7Gyn_R_tBbMtOGNZtmyXNB2tuSweahWBhL29FL-6fJTTn1fAL62-fbyVs3W_Yb_zeOHwM0-hWuC1OKc Passcode: 79hAJ52z

- You may need to type in the meeting passcode which you will find contained within the email.

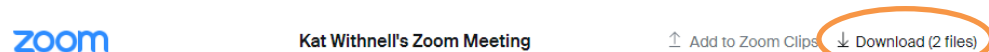
Note: Zoom sessions scheduled for recording from your Canvas Course Site will be available in your Site's Panopto folder and not the Zoom Cloud.

- Next, you need to download the recording to your computer using the **Download** button. The **Download** button will appear differently depending on whether you were the meeting host, or the email has been shared with you:

For the meeting host, it should look like this:



If the email has been shared with you it should look like this:



Note:

- Each recording will contain three files:
 - o MP4 video and audio file
 - o M4A audio only file
 - o VTT text transcript file

The MP4 file is the only file that needs to be saved to TRIM.

- How you download the file(s) and where they download to will depend on the browser you are using and the settings you have configured.

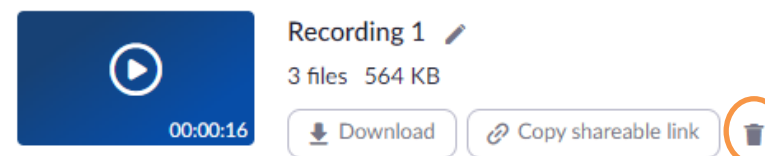
The remainder of this guide details instructions on how to upload the recording and (if applicable) other relevant documents into TRIM.

Note: Once the VIVA recording has been uploaded into TRIM and quality checked to ensure it opens / plays, the recording should be deleted from the Zoom Cloud by the meeting organiser. This is because the recording in TRIM is now the source of truth for the University, so by deleting the recording from the Zoom Cloud we ensure we aren't using up our limited Zoom Cloud storage space by retaining duplicate information, plus we ensure we are not retaining this sensitive information in more than one place which is an important step in ensuring this information is protected from unauthorised access.

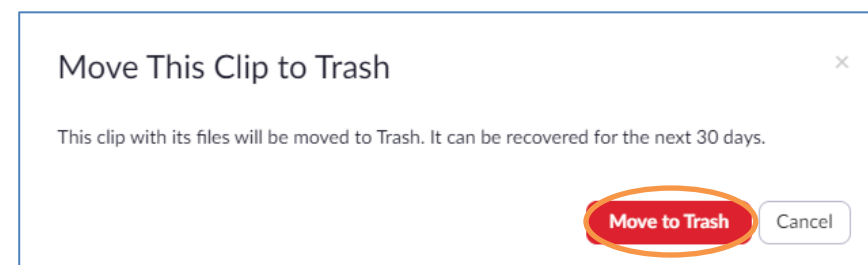
Please ensure your School has the appropriate process in place to ensure this occurs.

To delete your VIVA recording from the Zoom Cloud:

- In the Zoom Cloud, click the **trash can** button next to the recording:



- The below window will display. Select **Move to Trash**:



Introducing TRIM - Content Manager

TRIM 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. TRIM 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

TRIM can be accessed using the TRIM Web Client from a PC, Mac, laptop, iPad, iPhone or other mobile device; TRIM 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.

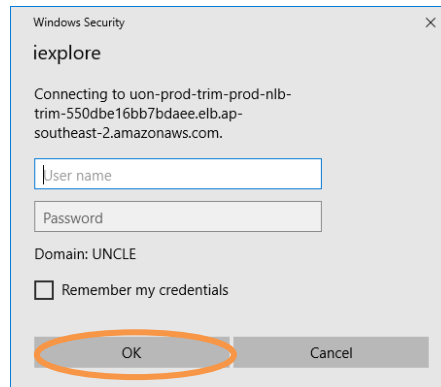
Note: To access the TRIM Web Client from offsite you will need the UON VPN (GlobalProtect) software installed on your device. Should you require assistance with VPN please contact the IT Service Desk (ServiceUON IT Service Portal or phone extension 17000).

Note: You can access Content Manager Web Client via a supported version of Chrome, Microsoft Edge, and Firefox.

The URL to enter in your browser is:

- <https://web.uonprd.cm.kapish.cloud/>

You will need to be a registered TRIM user to access the system. When accessing the TRIM Web Client via your browser you will be prompted for your UON network logon details. Enter your credentials then select **OK**:



Support

Records Governance Services

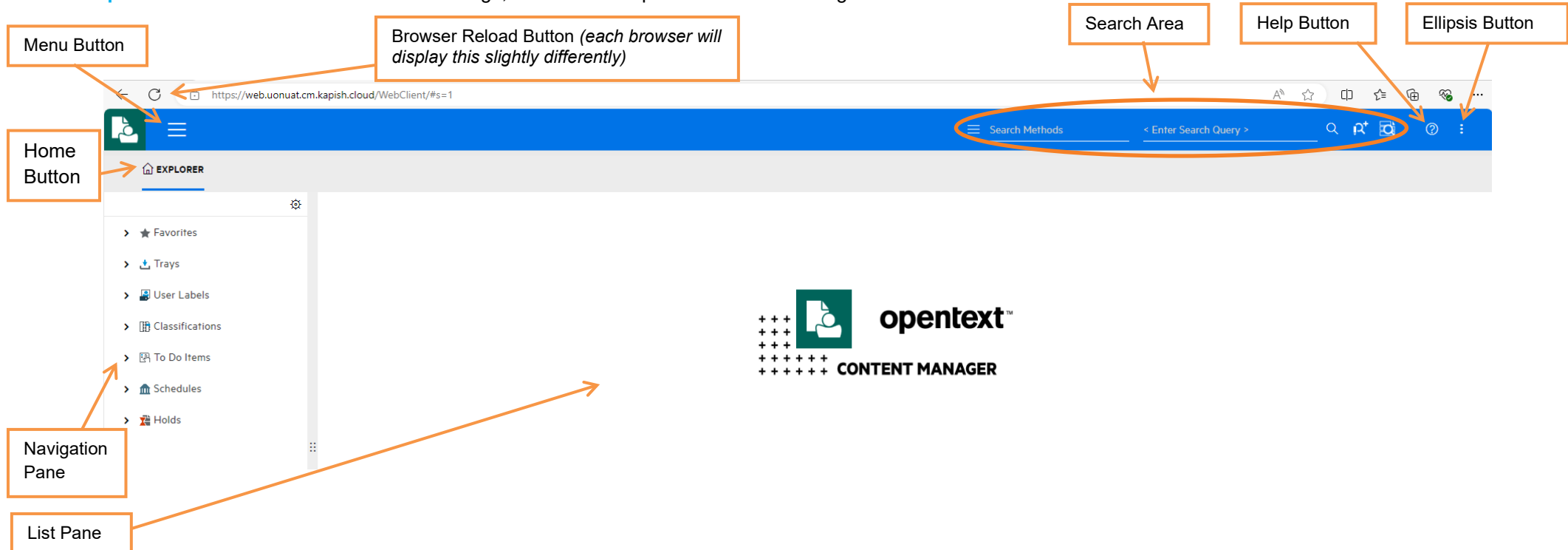
Phone: 492 15306

Email: records@newcastle.edu.au

Understanding the TRIM Web Client Home Screen

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

- **Explorer Window** – When you load the TRIM Web Client, 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
- **Navigation Pane** – Displays and allows you to navigate the hierarchical structure. Use the right-facing arrow > to the left of the item in the Navigation Pane to display its contents. Use the down-facing arrow v 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.
- **Home Button** – Returns you back to the ‘Explorer’ window.
- **Menu Button** – Displays a more comprehensive list of links and shortcuts to items such as saved searches, record actions, workflow activities and check in styles.
- **Browser Reload Button** – Reloads your TRIM 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 TRIM 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-see additional Web Client help and instructions.
- **Ellipsis Button** – Can be used to select settings, as well as setup information and to log out.

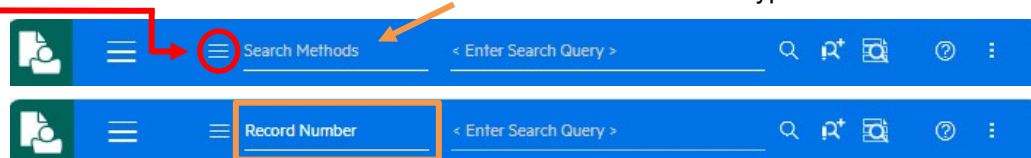


Saving a VIVA Recording to TRIM

The Oral Examination (VIVA) Procedure requires VIVA recordings to be saved to TRIM. Keeping these recordings in TRIM will also assist with the monitoring of VIVAs conducted by Schools.

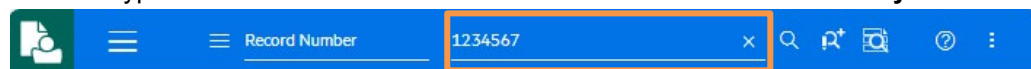
To save a VIVA recording into TRIM, you need to ensure it is saved to your computer (e.g. in your Downloads folder or on your Desktop). Then, follow the below steps:

1. First, locate and display the student cabinet in TRIM that you want to put the document into. Click in the **Search Methods** field and type 'Record Number':



Hint: The menu button next to the field populated with **Search Methods** has a drop-down list. For the vast majority of end users and in the vast majority of scenarios, this should be left as the default which is **Record**.

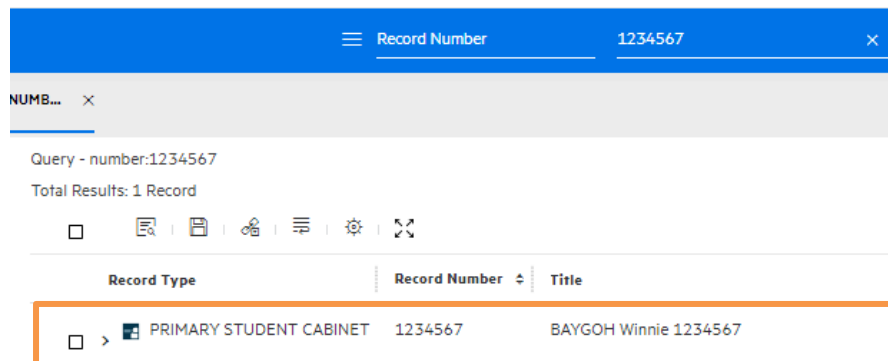
2. Type the student's **student number** into the **< Enter Search Query >** field:



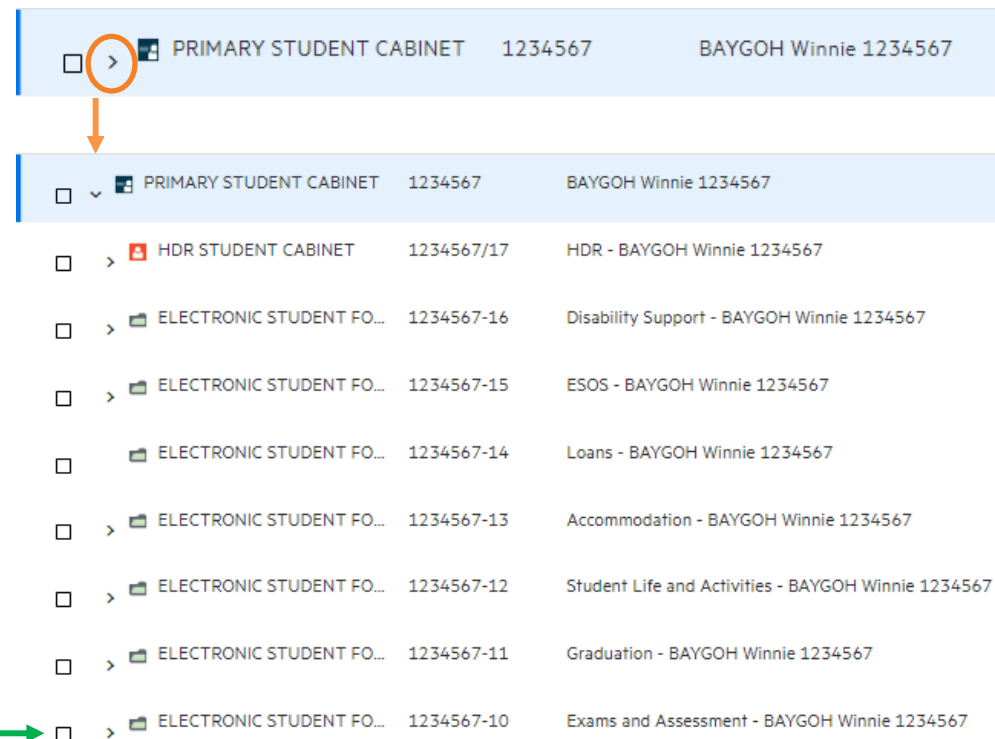
3. Once you are ready to search, press **Enter** on the keyboard, or click on the **magnifying glass** search button to the right of the **Search Area**:



4. The student's student cabinet will display:



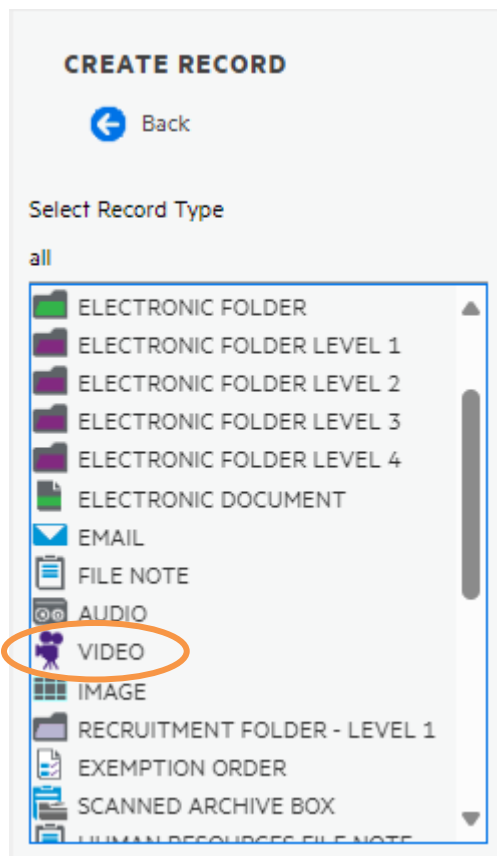
5. Click the **>** next to the student cabinet to display its contents:



Hint: The **'Exams and Assessment'** subfolder is the subfolder that VIVA records should be saved into.

6. Navigate to where the VIVA recording is currently stored (e.g. your **Downloads** folder).
7. Drag and drop the document onto the Exams and Assessment container in the Web Client.

8. The **'CREATE RECORD'** section will appear on the left of your TRIM Web Client screen with a list of record types to select from. For the VIVA recording you should use the **VIDEO** record type. Click on the **VIDEO** record type once to select it:



9. A **Record Entry Form** (example below) will appear. In the 'Title (Free Text Part)' field, type/amend the title of the document in line with the below:

Naming Convention:

VIVA Recording - <course code and name> - <student name and number> - DD MM YYYY
(where the date is the date of the recording)

Example:

VIVA Recording - 54321 Introduction to Medical Science - BAYGOH Winnie – 11 Oct 2024

GENERAL

Title (Free Text Part) *

VIVA Recording - 54321 Introduction to Medical Science - BAYGOH Winnie - 11 Oct 2024

Container *

1234567-10

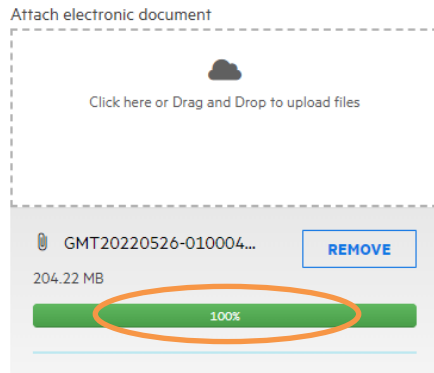
Date Created *

11/10/2024 02:49:00 PM

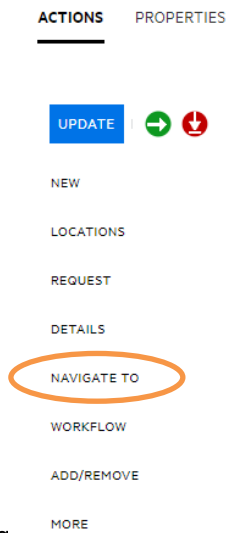
External ID

Enclosed?

10. The video will upload and show a green 100% bar when complete. Click **SAVE** to complete the upload process and create the record in TRIM:



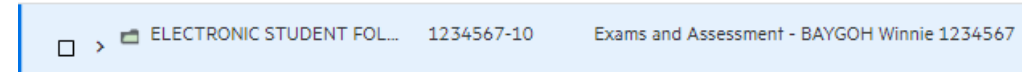
11. The VIVA recording will appear in TRIM
12. If you would like to see the VIVA recording within the context of the student's 'Exams and Assessment' subfolder or their entire student cabinet, first ensure the options such as ACTION, PROPERTIES, UPDATE etc. for the VIVA recording are displayed on the right-hand side of your screen, then click on the **NAVIGATE TO** option:



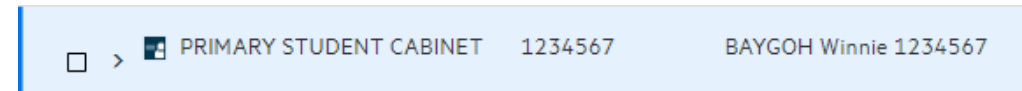
13. Click on 'Container Records':



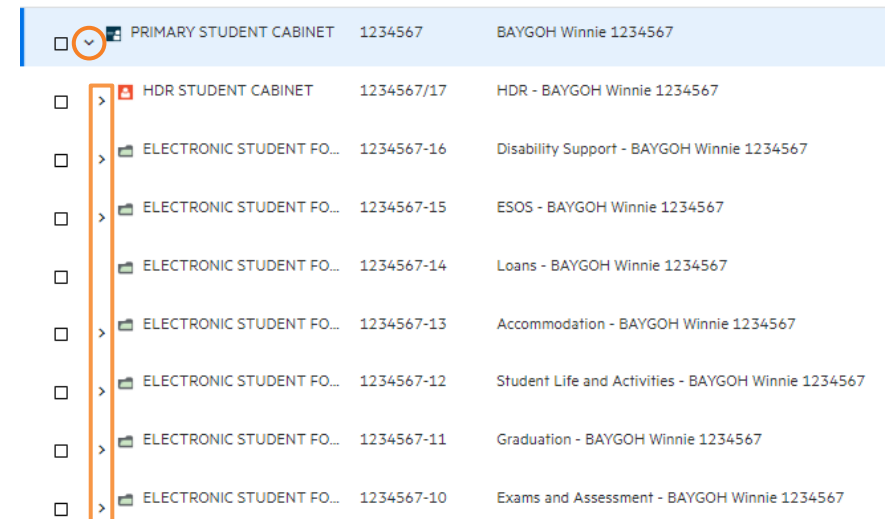
This will display the student's 'Exams and Assessment' subfolder:



Hint: Selecting **NAVIGATE TO** → **Container Records** again will then display the student's student cabinet:



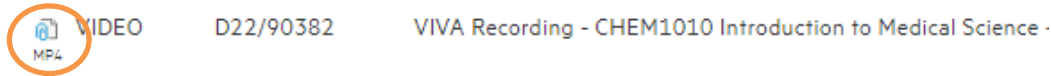
14. Clicking the > and V next to the student cabinet or any subfolders will display/hide its contents:



Viewing VIVA Recordings in TRIM

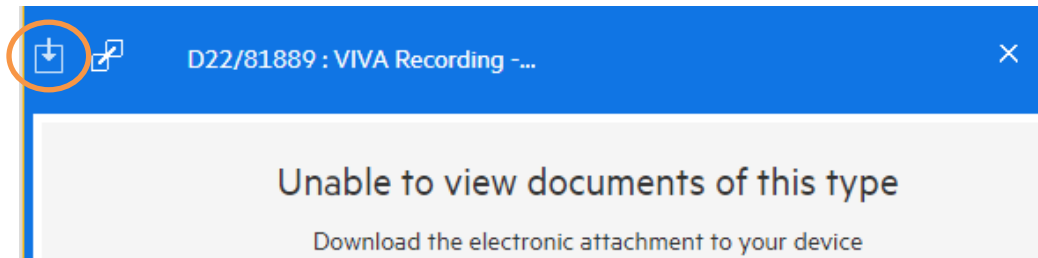
To view a record (video) in the TRIM Web Client:

1. First locate the record, then click on the records' **file type icon**



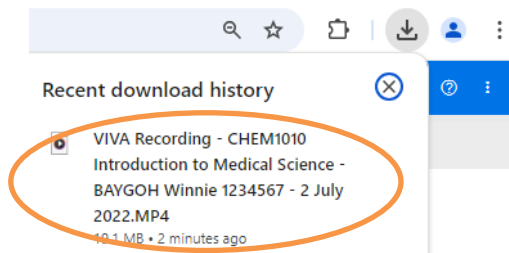
Note: File types such as Word documents, PDF documents, spreadsheets and emails will display in the TRIM Web Client Viewer. However, some file types, such as MP4 videos (which are used for VIVA recordings) are unable to be displayed in the Web Client Viewer.

2. To view VIVA recordings, click the **Download** button:

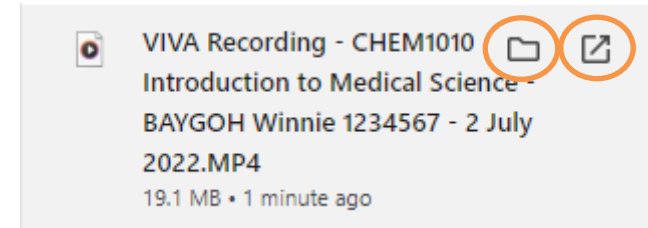


4. The document will be downloaded to your local computer (where the document downloads to and how you access it may differ depending on the browser you are using and your download settings, however if using Google Chrome, the document will download to your 'Downloads' folder on your computer and be available for you to open at the top right of your Google Chrome window as shown below):

Hint: Alternatively, you will be able to access it in your 'Downloads' folder on either a PC or a Mac.



5. If using Google Chrome, you will have the option to either:
 - a. Show in folder: Will open your 'Downloads' folder and highlight the recently downloaded document for you. From here, you can open it or move it to your desktop for easier future access; or
 - b. Open: This will depend on your default app settings, as to whether it will open in the browser, or in the authoring application.

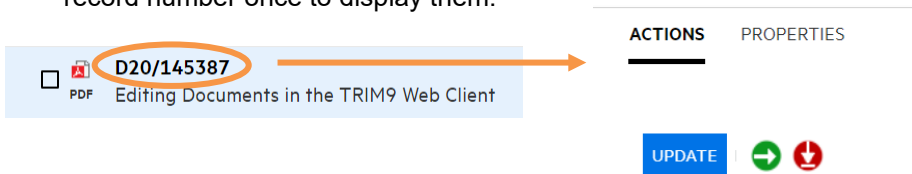


Changing the Title of a Record

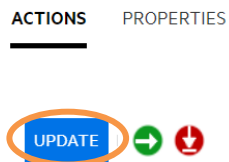
You can change the title of a record (Cabinet, Folder, Sub-Folder, Document, Email etc.) if you have made an error or you need to add additional information.

To change the title of a record in the TRIM Web Client:

3. Locate the record for which you want to change the title.
4. Ensure the options for the record such as ACTIONS, PRIORITIES, UPDATE etc. are displayed on the right-hand side of your screen. If not, click on the record number once to display them:



5. Click the **UPDATE** button:



6. The Record Entry Form for that record will display. The 'Title' field should display towards the top of the Record Entry Form (but depending on which record type you are changing the title for, may not always be the first field):

GENERAL

Title (Free Text Part) *

Example Document

7. Update the 'Title' field as required, then select **SAVE** to save the changes:

RECORD NUMBER: C17/15/09

GENERAL

Title (Free Text Part) *

VIVA Recording - 54321 Introduction to Medical Science - BAYGOH Winnie - 23 May 2022

Container

1234567-10

External ID

Date Created *

19/06/2019 03:51:00 PM

Date Due

DD/MM/YYYY hh:mm:ss

Author

< Enter Search Query >

Enclosed?

Assignee *

Records Governance Services (RGS)

NOTES

SAVE CANCEL

Adding Notes to a VIVA Recording in TRIM

Should you need to capture notes against a VIVA recording or any other record in TRIM in order to provide additional information about the content/context of the record, please refer to the [TRIM - Quick Reference Guide - D20/145047 - Adding Notes to a Record in the TRIM Web Client](#) for guidance on how to do this.

E.g. You could record a note against a VIVA recording detailing who conducted the VIVA.

Moving Records from one Container to Another

The term 'container' in TRIM is used to describe a record type which can contain a record inside of it. Typically, this would be a folder which contains a document; however, in TRIM at UON there are many different folder record types, as well as sub-folder record types and cabinet record types which can all contain other records. Hence, the term 'container' is used to broadly refer to them all.

Should you accidentally place a VIVA recording or other record in the wrong container, please refer to the [TRIM - Quick Reference Guide - D20/145452 - Moving Records between Containers in the TRIM Web Client](#) for guidance on how to move it to the correct container.

Deleting Records

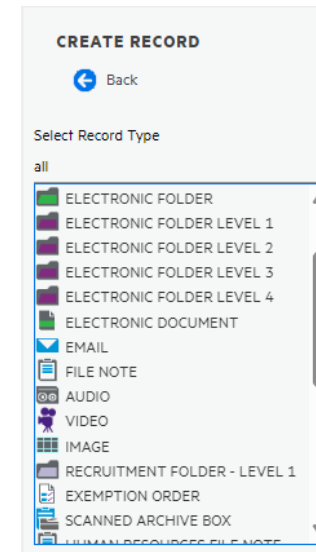
Occasionally a record requires deletion from TRIM, most often because it was accidentally put in TRIM twice. The Recycle Bin feature in TRIM allows an end user to quickly and easily send a record they have created in error to the TRIM Recycle Bin.

Should you ever need to delete a record from TRIM, please refer to the [TRIM Quick Reference Guide – D20/145438 –Deleting Records in the TRIM Web Client](#) for guidance on how to do this.

Saving Other VIVA Records to TRIM

If you happen to have other records in addition to but related to a student's VIVA that you are required to save to TRIM, they too should be added to the student's **'Exams and Assessment'** subfolder. Like saving a VIVA recording to TRIM, other records such as documents and emails can also be uploaded to TRIM via the same process.

Hint: When saving these other records to TRIM and the 'CREATE RECORD' section appears on the left of your TRIM Web Client screen with a list of record types to select from, be sure to select the record type which matches the record you're saving to TRIM. E.g. **ELECTRONIC DOCUMENT** if it is a document, **EMAIL** if it is an email:



Hint: To title these other records, you can use the below Naming Convention:

<description of record> - <course code and name> - <student name and number> - DD MM YYYY (where, if applicable, the date is the date of the recording. Otherwise, if required, it can be any other applicable date such as date of correspondence)

Hint: Below is a link to all UON TRIM Knowledge Guides on the Records Governance Services SharePoint site should you be interested in learning more:

[TRIM Knowledge Guides](#)