## Introduction

The purpose of this guide is to detail how to save and manage Oral Examination (VIVA) records in TRIM9. For additional information/guidance on VIVAs please refer to the Quality Assurance – Course Assessment Risk Ratings SharePoint site and 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.
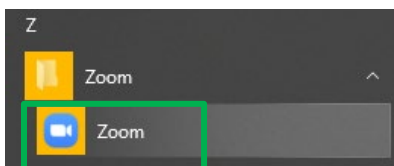
Recording VIVAs using Zoom

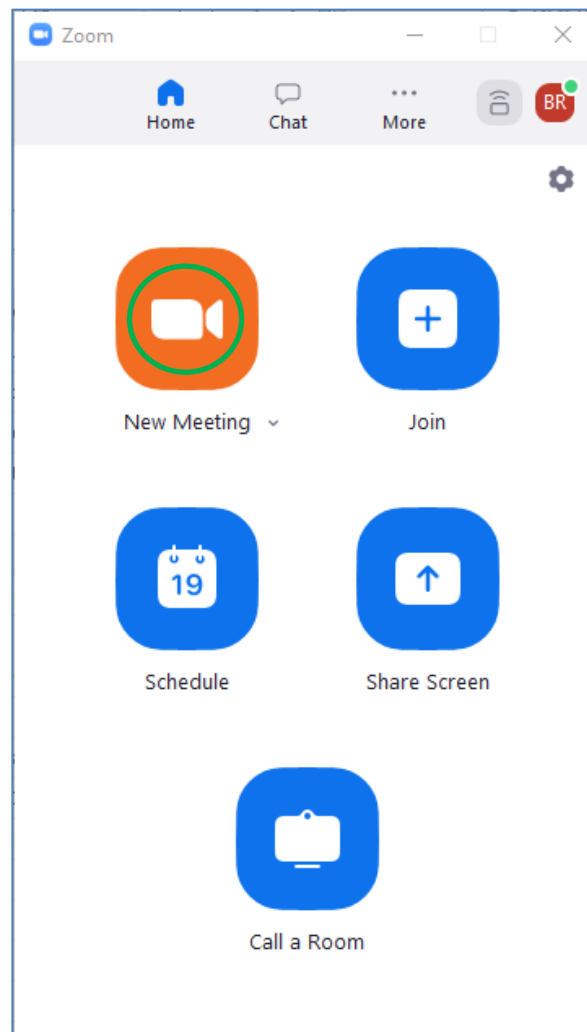1. Click on the Windows **Start button**:
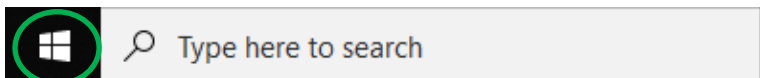
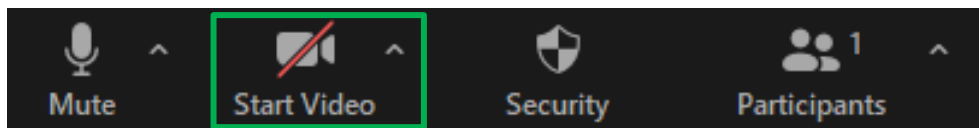2. Scroll down to 'Z' and click on the **Zoom** folder drop-down:


3. Click on the **Zoom** application:

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

5. 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:

6. Click the **Record** button at the bottom of the 'Zoom Meeting' window:
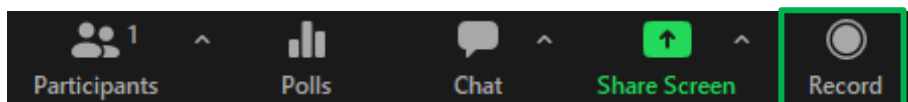

7. The below options will appear. Select to save the recording to the Cloud, and you can then commence the VIVA:
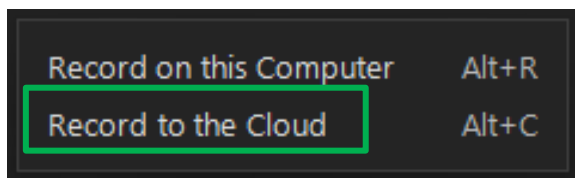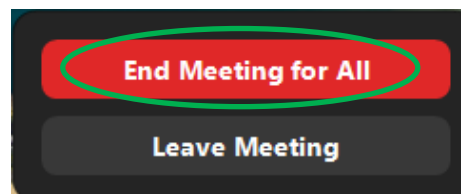

Note:
- The recording will save to the Zoom Cloud, and you will receive an email shortly after the meeting is ended containing links to the recording of the meeting in the Cloud.

8. Once the VIVA is complete, click the **End** button at the bottom right of the 'Zoom Meeting' window:
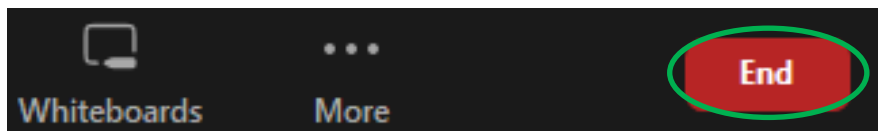
9. Click **End Meeting for All**:

Accessing / Sharing and Downloading the Recording

1. The next step is to ensure the recording is available to the staff member(s) who are required to save it to TRIM9. 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 TRIM9 then the email will need to be forwarded onto the appropriate staff who have responsibility for this task.

2. 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**):
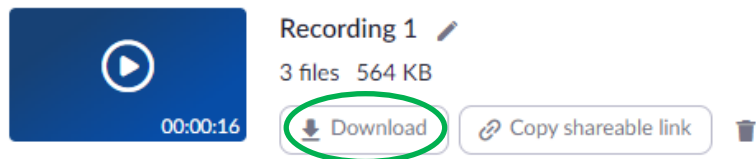

3. You may need to type in the meeting passcode which you will find contained within the email.

4. 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:
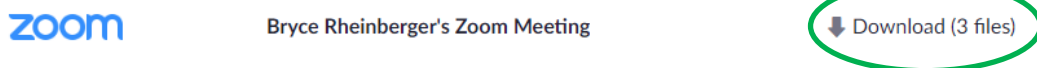
Note:
-   Each recording will contain three files:
    o   MP4 video and audio file
    o   M4A audio only file
    o   VTT text transcript file

    The MP4 file is the only file that needs to be saved to TRIM9.

-   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 TRIM9.

Note: Once the VIVA recording has been uploaded into TRIM9 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 TRIM9 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.
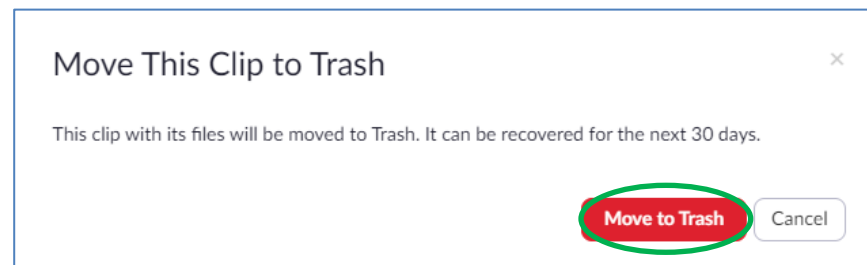
Please ensure your School has the appropriate process in place to ensure this occurs.

To delete your VIVA recording from the Zoom Cloud:

1. In the Zoom Cloud, click the **trash can** button next to the recording:
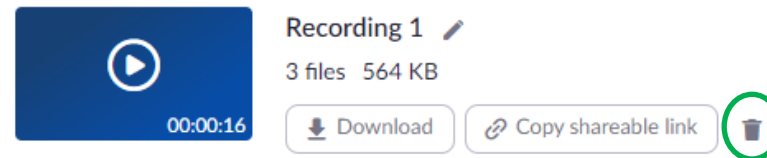
2. The below window will display. Select **Move to Trash**:

Introducing TRIM9 - Content Manager

TRIM9 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 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

TRIM9 can be accessed using the TRIM9 Web Client from a PC, Mac, laptop, iPad, iPhone or other mobile device; TRIM9 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 TRIM9 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).

The URL to enter in your browser is:

- https://records.newcastle.edu.au

You will need to be a registered TRIM user to access the system. When accessing the TRIM9 Web Client via your browser you will be prompted for your UON network logon details.

Enter your credentials then select **OK**:
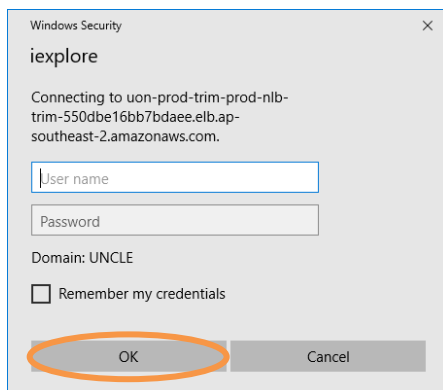

Support

Records Governance Services

Phone: 492 15306

Email: records@newcastle.edu.au

Understanding the TRIM9 Web Client Home Screen

Please refer to the below picture for an explanation of the different sections which make up the TRIM9 Web Client home screen:

- **Dashboard** – The Home Screen of the TRIM9 Web Client is a dashboard that allows users easy access to up to three items. The default Dashboard items are **Documents Checked Out**, **Favorite Records** and **Recent Documents**.
- **Home Button** – Returns you back to your Dashboard.
- **Menu Button** – Displays a more comprehensive list of links and shortcuts to items such as records checked out by you, records created by you, saved searches, record actions and workflow activities.
- **Browser Reload Button** – Reloads your TRIM9 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 are 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 TRIM9 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-seek additional Web Client help and instructions.
- **Settings Button** – Can be used to select different dashboard items should you wish to change from the three default dashboard items as displayed in the picture below:
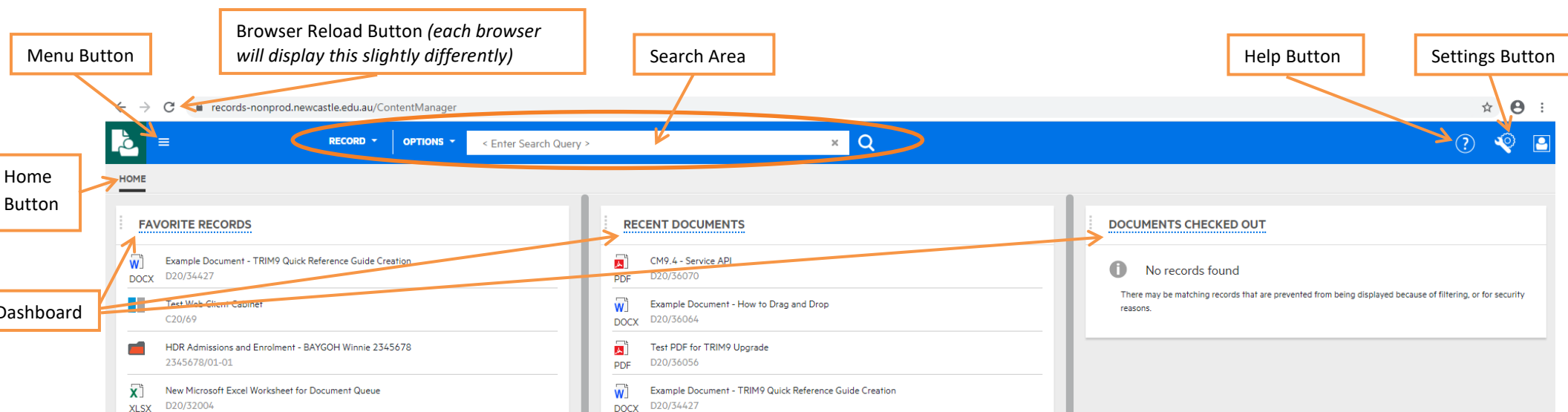
## Saving a VIVA Recording to TRIM9

The Oral Examination (VIVA) Procedure requires VIVA recordings to be saved to TRIM9. Keeping these recordings in TRIM9 will also assist with the monitoring of VIVAs conducted by Schools.

To save a VIVA recording into TRIM9, first 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:
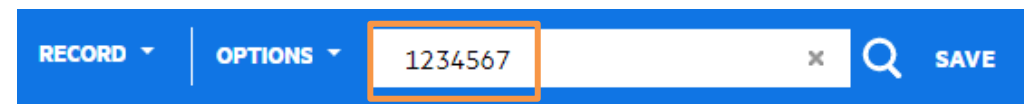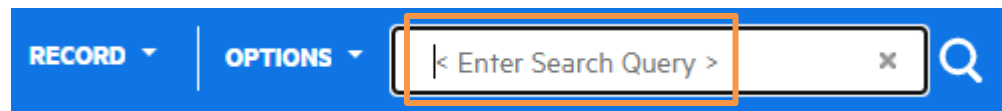
1. First, locate and display the student cabinet in TRIM9 that you want to put the document into. Go to the **Search Area** and
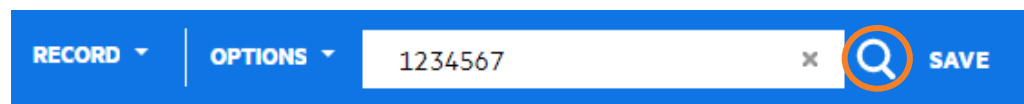   - Ensure **RECORD** is displayed as shown below:
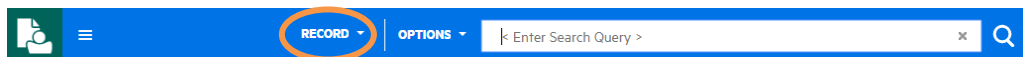
If it isn't, click the **drop-down** arrow for this field and select **Record** from the options that display:
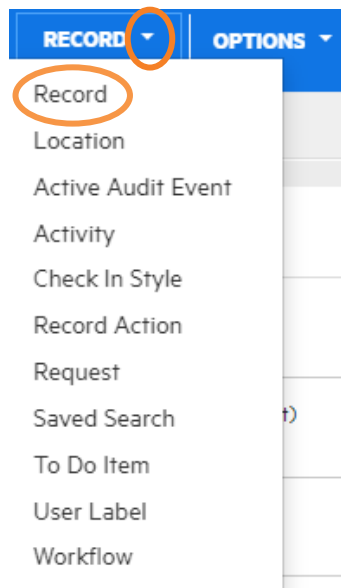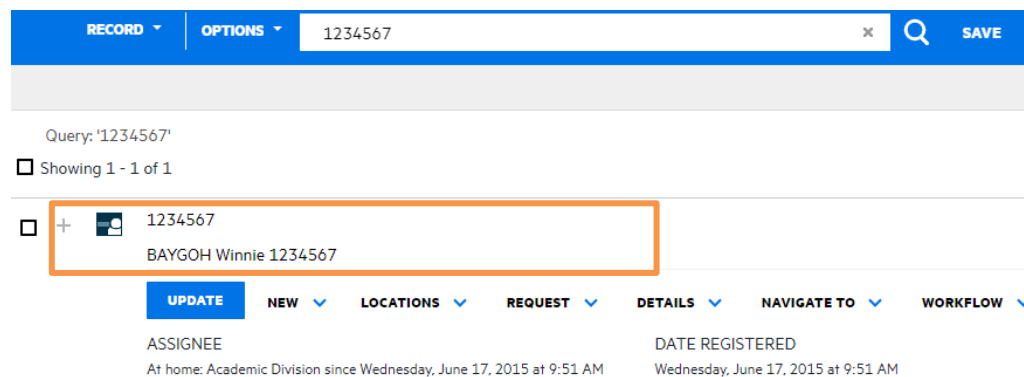

2. Type the student's **student number** into the < Enter Search Query > field:
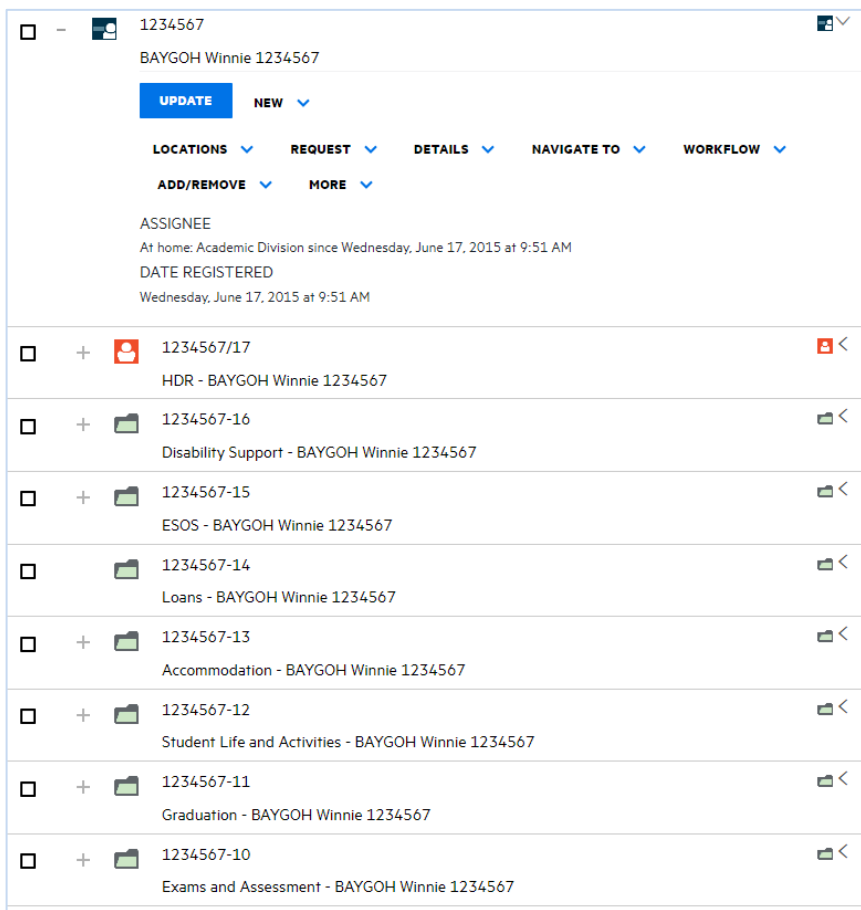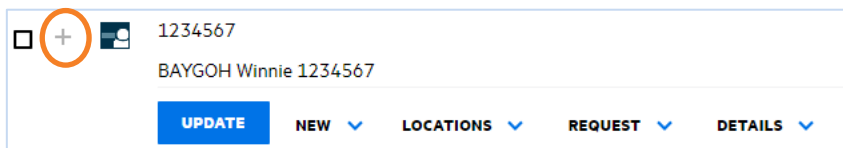

3. Once you are ready to search, press **Enter** on the keyboard, or click on the **magnifying glass** search button to the right of the **Search Area**:

4. The student's student cabinet will display:

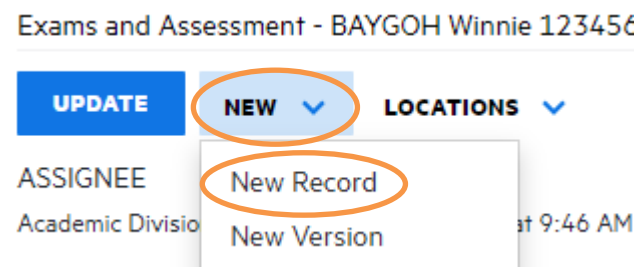5. Click the **+** next to the student cabinet to display its contents:

6. Ensure the options for the 'Exams and Assessment' subfolder such as UPDATE, NEW, LOCATIONS etc. are displayed. If not, click on the 'Exams and Assessment' record number once to display them:

7. With the folder options displayed for the 'Exams and Assessment' subfolder, click on the **NEW** drop-down and select **New Record**:

8. The 'CREATE RECORD' section will appear on the left of your TRIM9 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, then click **OK**:

Hint: The **'Exams and Assessment'** subfolder is the subfolder that VIVA records should be saved into.
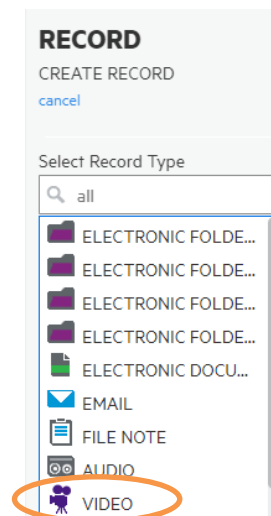
9. A **Record Entry Form** (example below) will appear. In the 'Title (Free Text Part)' field, type/amend the title of the document in line with the below:

<u>Naming Convention:</u>

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

<u>Example:</u>

VIVA Recording - 54321 Introduction to Medical Science - BAYGOH Winnie - 3 May 2022

GENERAL

Title (Free Text Part) *(Required)*

VIVA Recording - 54321 Introduction to Medical Science - BAYGOH Winnie - 3 May 2022

Container *(Required)*

1234567-10 Exams and Assessment - BAYGOH Winnie 1234567

Date Created *(Required)*

16/06/2022 11:53 AM

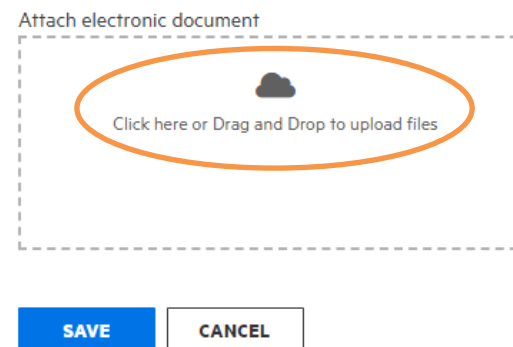External ID

☐ Enclosed?

NOTES

Attach electronic document

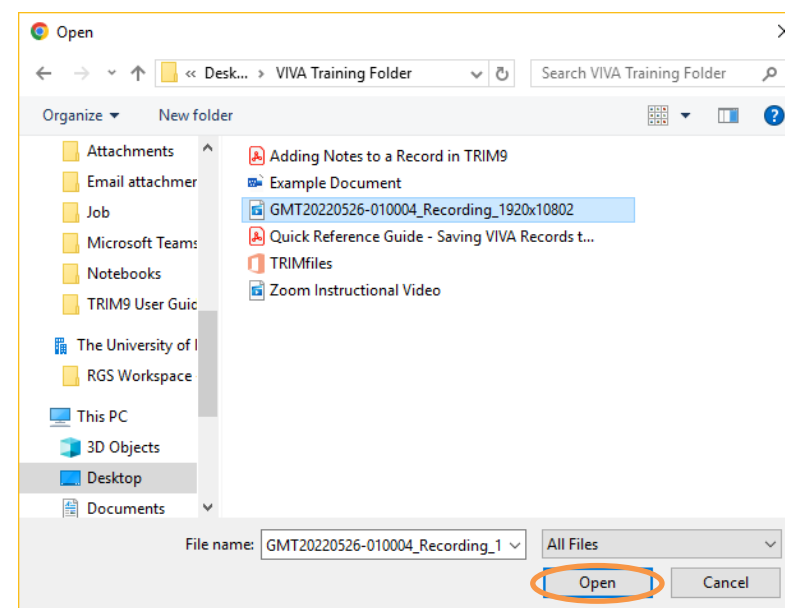Click here or Drag and Drop to upload files

SAVE   CANCEL

10. Click in the area titled **Attach electronic document**:

Hint: You can instead choose to drag and drop the document you want to upload into this **Attach electronic document** area, and then skip forward to .

Attach electronic document

Click here or Drag and Drop to upload files

SAVE   CANCEL

10. File Explorer/Finder will open. Navigate to where the VIVA recording is currently stored (e.g. your **Downloads** folder), click on it once to select it, then select **Open**:

11. The video will upload and show a green 100% bar when complete. Click **SAVE** to complete the upload process and create the record in TRIM9:

12. The VIVA recording will appear in TRIM9:

13. 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 UPDATE, NEW, LOCATIONS etc. for the VIVA recording are displayed, then click on the **NAVIGATE TO** option:

14. 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:

15. Clicking the **+** and **–** next to the student cabinet or any subfolders will display/hide its contents:

☐ Showing 1 - 1 of 1

☐ ⊖ 📇 1234567
BAYGOH Winnie 1234567

UPDATE   NEW ⌄   LOCATIONS ⌄   REQUEST ⌄   DETAILS ⌄   NAVIGATE TO

ASSIGNEE   DATE REGISTERED
At home: Academic Division since Wednesday, June 17, 2015 at 9:51 AM   Wednesday, June 17, 2015 at 9:

☐ + 🟥 1234567/17
HDR - BAYGOH Winnie 1234567

☐ + 📁 1234567-16
Disability Support - BAYGOH Winnie 1234567

☐ + 📁 1234567-15
ESOS - BAYGOH Winnie 1234567

☐ 📁 1234567-14
Loans - BAYGOH Winnie 1234567

☐ + 📁 1234567-13
Accommodation - BAYGOH Winnie 1234567

☐ + 📁 1234567-12
Student Life and Activities - BAYGOH Winnie 1234567

☐ + 📁 1234567-11
Graduation - BAYGOH Winnie 1234567

☐ – 📁 1234567-10
Exams and Assessment - BAYGOH Winnie 1234567

☐ 📎 D22/81889
MP4   VIVA Recording - 54321 Introduction to Medical Science - BAYGOH Winnie - 3 May 2022

Viewing VIVA Recordings and Other Records in TRIM9

To view a record (video, document, spreadsheet, email etc.) in the TRIM9 Web Client:

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

📎 D22/81889
MP4   VIVA Recording - 54321 Introduction to Medical Science - BAYGOH Winnie - 3 May 2022

2. File types such as Word documents, PDF documents, spreadsheets and emails will display in the TRIM9 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:

🔽 ⤢   D22/81889 : VIVA Recording -...   ✕

Unable to view documents of this type
Download the electronic attachment to your device
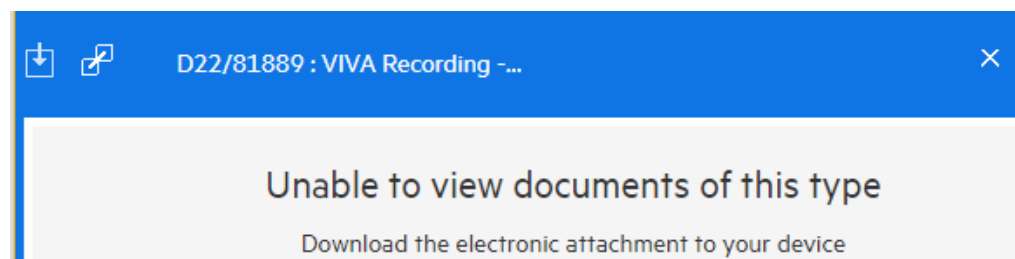
3. To view VIVA recordings, or to view other records such as Word documents, PDF documents, spreadsheets and emails in their default/authoring application, click the **Download** button:

🔽 ⤢   D22/81889 : VIVA Recording -...   ✕

Unable to view documents of this type
Download the electronic attachment to your device
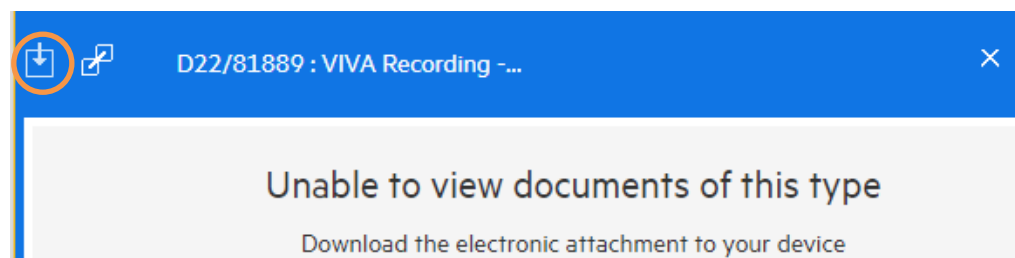
4. The video/document will be downloaded to your local computer (where the document downloads to and how you access it may differ depending on the browser

you are using and your download settings, however using Google Chrome (recommended) and its default settings, the video/document will download to your 'Downloads' folder on your computer and be available for you to open at the bottom left of your Google Chrome window as shown below):
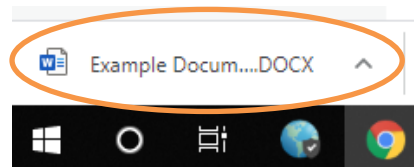
Hint: Alternatively you will be able to access it in your 'Downloads' folder on either a PC or a Mac.

5. If using Google Chrome, if you click on the video/document itself at the bottom left of your Google Chrome window then the video/document will open in its default/authoring application:
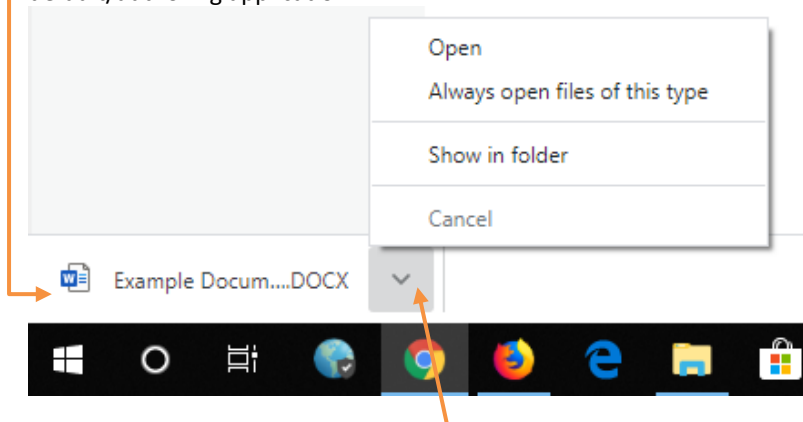
Alternatively, if you click on the drop-down arrow as shown above you will be given three options:

Open : Will open the video/document in its default/authoring application,

Always open files of this type : Changes your Google Chrome settings so that next time you download a file of this type it will automatically open,

Show in folder : Will open your 'Downloads' folder and highlight the recently downloaded document for you. From here you can open it, or perhaps drag and drop it to your desktop for easier future access.

Changing the Title of a Record

You can change the title of a record in TRIM9 if you have made an error or you need to add additional information.

To change the title of a record using the TRIM9 Web Client:

1. Locate the record for which you want to change the title.

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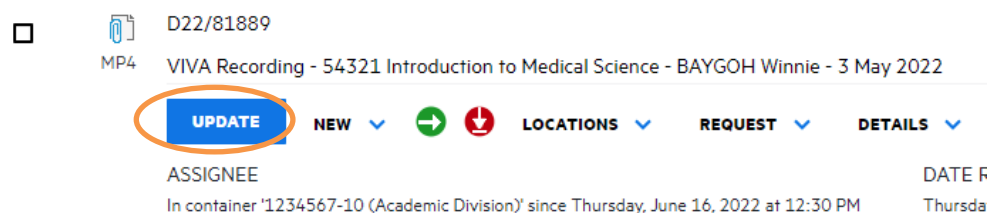
4. The Record Entry Form for that record will display. The 'Title' field should display towards the top of the Record Entry Form (but depending on which record type you are changing the title for, may not always be the first field):

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

GENERAL

Title (Free Text Part) *(Required)*
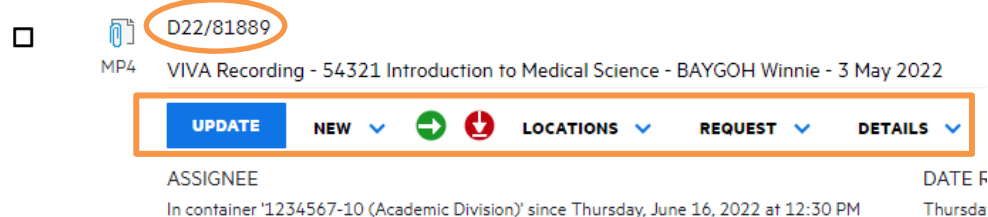
VIVA Recording - 54321 Introduction to Medical Science - BAYGOH Winnie - 23 May 2022

Container *(Required)*

📁 1234567-10

Date Created *(Required)*

6/06/2022 2:13 PM

External ID

☑ Enclosed?

NOTES

SAVE   CANCEL

Adding Notes to a VIVA Recording in TRIM9

Should you need to capture notes against a VIVA recording or any other record in TRIM9 in order to provide additional information about the content/context of the record, please refer to the *TRIM9 - Quick Reference Guide - D20/145047 - Adding Notes to a Record in the TRIM9 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 TRIM9 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 TRIM9 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 *TRIM9 - Quick Reference Guide - D20/145452 - Moving Records between Containers in the TRIM9 Web Client* for guidance on how to move it to the correct container.

Deleting Records

Occasionally a record requires deletion from TRIM9, most often because it was accidentally put in TRIM9 twice. Although the TRIM9 Full Client has a Recycle Bin feature, unfortunately there is no way for an end user to delete a record in the TRIM9 Web Client.
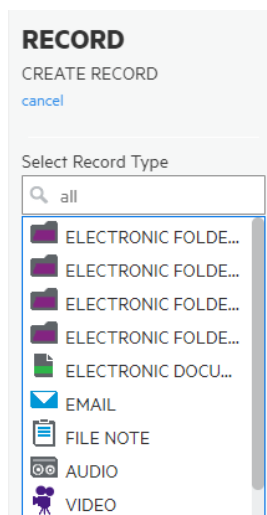
Should you solely use the TRIM9 Web Client and ever need to delete a record from TRIM9, please email records@newcastle.edu.au requesting the deletion of the record, being sure to include in your email the below information about the record which requires deletion:

- Record Number
- Record Title
- Reason why the record requires deletion. E.g. Duplicate (if it is a duplicate, please also provide the Record Number of the record it is a duplicate of).

Saving Other VIVA Records to TRIM9

If you happen to have other records in addition to but related to a student's VIVA that you are required to save to TRIM9, they too should be added to the student's **'Exams and Assessment'** subfolder. Like saving a VIVA recording to TRIM9, other records such as documents and emails can also be uploaded to TRIM9 via the same process.

Hint: When saving these other records to TRIM9 and the 'CREATE RECORD' section appears on the left of your TRIM9 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 TRIM9. 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> - D MMM 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 TRIM9 Knowledge Guides on the UON website should you be interested in learning more:

TRIM9 Knowledge Guides