

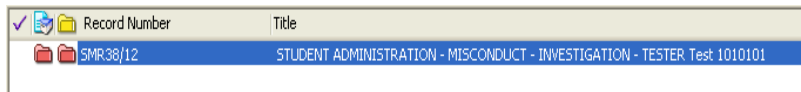
TRIM Desktop Client Guide – Electronic Records for SACOs

Note - These instructions are not for the Web Client

CREATE NEW FILE (at time of referral)

1. From the TRIM toolbar, select **Create** Icon, then **Record**
2. Select Record Type **STUDENT MISCONDUCT**
3. Fill in form details up until the field “Investigation Complete – Dismissed” on the Investigation Form:

4. Select **OK** – File has now been created

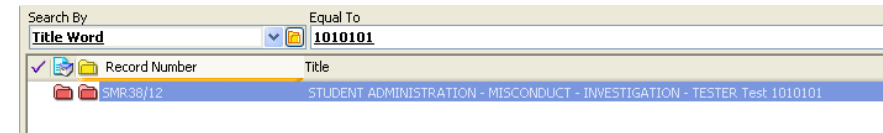


5. Add File to Favourites (Using Icon at top of screen)
6. Documents and emails can now be attached to Investigation File
7. When determination has been made, navigate to the file, highlight file, right click and select Properties.
8. If determination is **Not Guilty**, check the box “Investigation Complete – Dismissed”. Select OK and within 3 minutes, TRIM will automatically de-identify the file and remove unnecessary metadata.
9. If Determination is **Guilty**, check the box “Case is on the SMR” and complete the remaining metadata fields” Select OK, and within 3 minutes TRIM will automatically change the File title to “Misconduct Case”

SEARCH FOR EXISTING CASE

1. Ensure Search By **Title Word** is selected in the Search Pane.
2. Enter the Student Number (or Name) in the **Equal To** field:

3. Select OK
4. If a Student has a previous SMR record, it will appear in the List Pane:

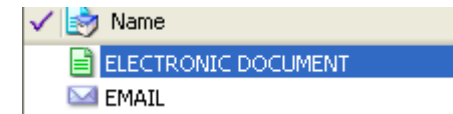


Student Misconduct Case Records will be identified with a Red Icon: 

5. To view the Record Of Decision form, highlight the file, right click, and select properties

SAVE A DOCUMENT

Documents can be saved to TRIM by dragging and dropping to the File or Folder you wish to save them in **or** by right clicking on the document and selecting Send To TRIM. In the **Record Type** box, choose **Electronic Document** then click **OK**.



1. Add an appropriate title and choose the Folder for it to be saved in if using the Send To TRIM method (recent Files used will appear in the drop down box). Use the yellow KwikSelect icon if you need to search for the correct File

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2. Click **OK**.

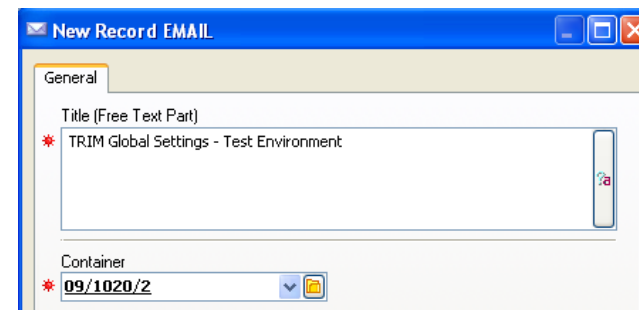
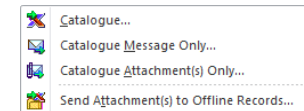
EDIT A DOCUMENT WITHIN TRIM

1. Highlight the Document you wish to edit, and then select the **Edit** icon.
2. The document will open in its source application.
3. Edit the document, then save and close (do not select Save As, as this will create a new record)
4. Choose **File>Close** or the top right hand red cross icon to close the window.

SAVING AN EMAIL

Method 1 - Cataloguing



1. From the Microsoft Outlook Inbox, highlight the Email, right click, scroll down to **HPE TRIM**, and then click the **Catalogue** icon.



2. In Title (Free Text Part) box, make sure the title follows naming conventions. Choose the Container for it to be saved in. Use the yellow KwikSelect icon if you need to search for the correct Container.
3. Click **OK**.
4. You can also catalogue attachments separately using the Catalogue Attachments only icon.

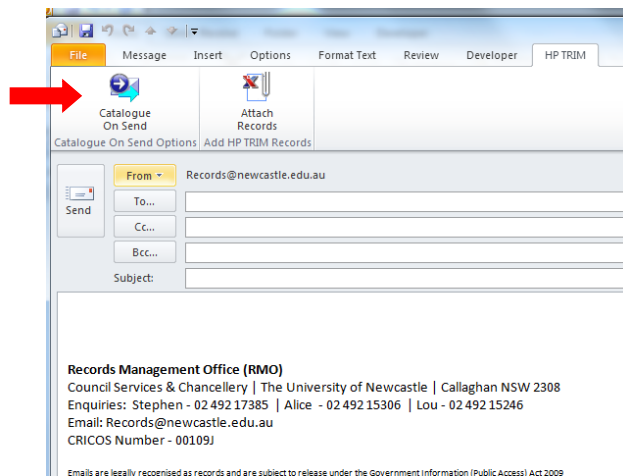
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Method 2 - Drag and Dropping Individual or Multiple files

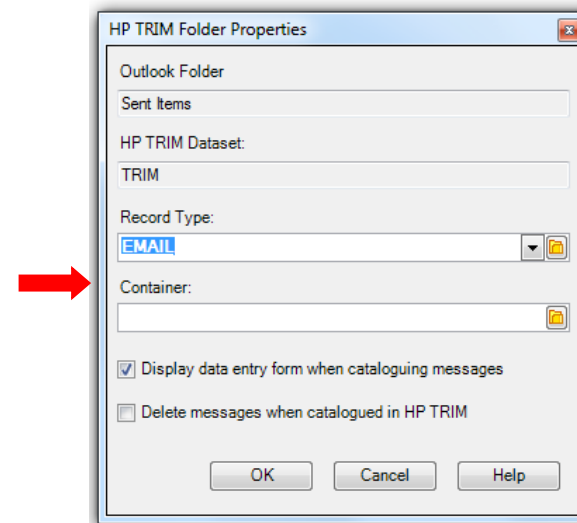
1. Ensure TRIM is open and the destination file/subfolder is on screen
2. From the Outlook Inbox, highlight the email and drag it to TRIM and drop into destination file/subfolder.
3. Once saved into TRIM the email icon  should appear in the left column, if a blank page icon  appears then the email hasn't saved correctly and requires resaving.

Method 3 - Catalogue on Send – when creating new emails

1. After selecting **NEW E-MAIL**, **FORWARD** or **REPLY**, and creating an email, on the Toolbar, select the **HPE TRIM** tab
2. Then click on the **CATALOGUE ON SEND** icon



3. A **HPE TRIM FOLDER PROPERTIES** window will appear
4. Ensure the **RECORDS TYPE** field shows **EMAIL**
5. In the **CONTAINER** field, add the destination File/Subfolder number
6. Ensure the **DISPLAY DATA ENTRY FORM WHEN CATALOGUING MESSAGES** option is checked > **OK**



7. A **NEW RECORD EMAIL** window will appear, ensure the titling is correct, then **OK**.

The Email has now been sent, and saved to TRIM.

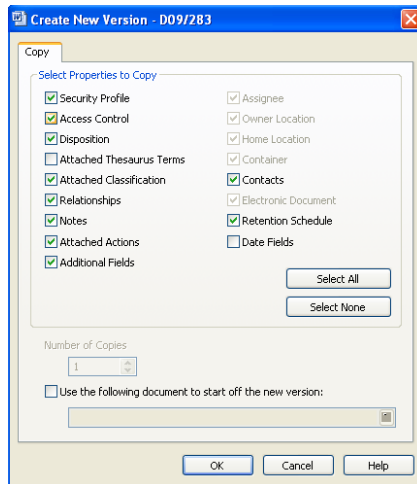
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SEND A RECORD (REFERENCE OR DOCUMENT) BY EMAIL

1. Highlight or Tag the Record within TRIM, then select the **Send via Email** icon.
2. Choose the options for sending you require (TRIM Record Reference, Internet URL, or Electronic Document).
3. GroupWise will open and the email can be composed (the record or reference will be an attachment). Add the recipient email address and any comments you require, and then send.

CREATE A NEW VERSION OF A DOCUMENT

1. Highlight the Document you wish to create a new version from, and then click on the **New Version** icon.
2. Un-tick boxes as indicated or required, select **OK**.

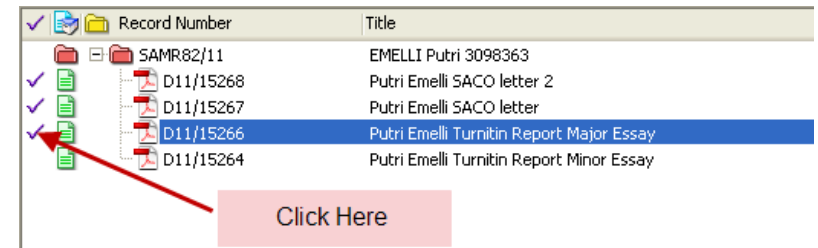


SEND A RECORD (REFERENCE OR DOCUMENT) BY EMAIL

4. Highlight or Tag the Record within TRIM, then select the **Send via Email** icon.
5. Choose the options for sending you require (TRIM Record Reference, or Electronic Document).
6. Outlook will open and the email can be composed (the record or reference will be an attachment). Add the recipient email address and any comments you require, and then send.

TIPS & TRICKS

- To open a SMR or SMI in order to edit any of the fields within, right click on the file and select Properties.
- To email multiple documents/emails as attachments, use the tag function. Tag each document/email you wish to send by using your mouse to navigate next to the record icon and click (tag) to select:



Then select the **Send via Email** Icon.

- To Select your School for corresponding field, you should type sch* in the window, and then click on the KwikSelect button

