

Purpose

This document is designed to assist staff with the function of adding Action Tracking Actions in TRIM9.

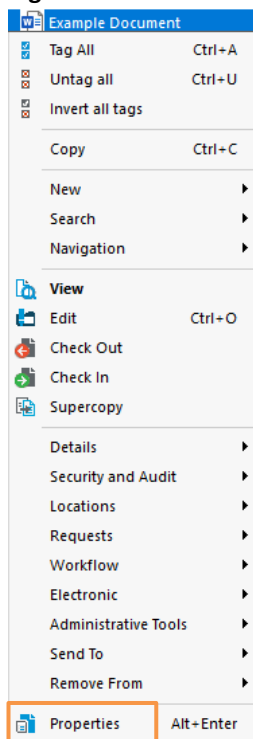
Hint: See [Appendix A](#) at the end of this guide for a list of available Actions and their purpose, plus information on Action Tracking icons and status indicators.

For instructions on how to insert an Action into an existing process please refer to the [TRIM9 - Quick Reference Guide - D15/230697 - Action Tracking - Inserting an Action in TRIM9](#).

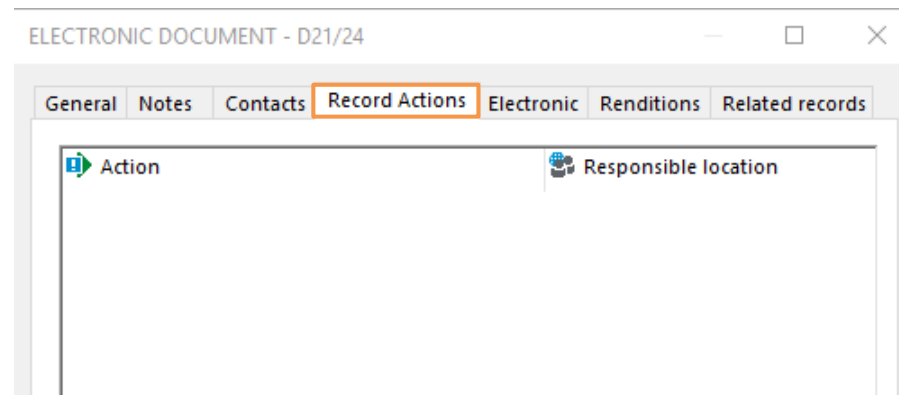
Adding an Action

To add an Action to a record:

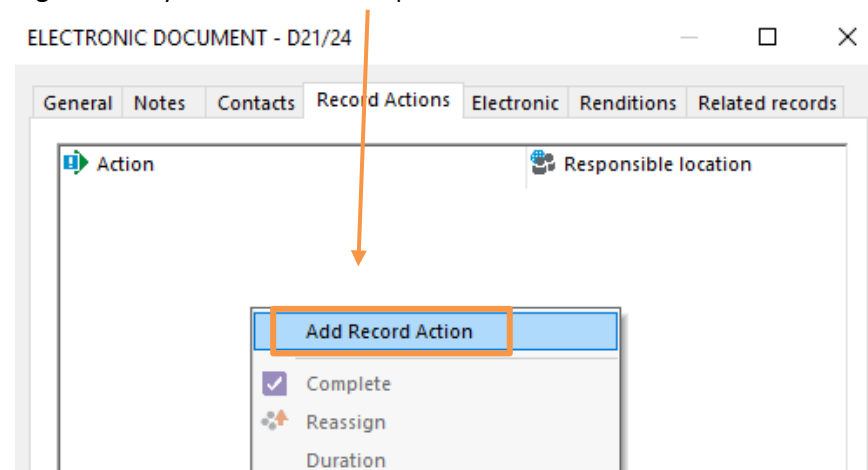
1. Locate the record in TRIM9 that you would like to add an Action to.
2. **Right-click** on the record → **Properties**:



3. The **'ELECTRONIC DOCUMENT'** window will appear. Click the **'Record Actions'** Tab:



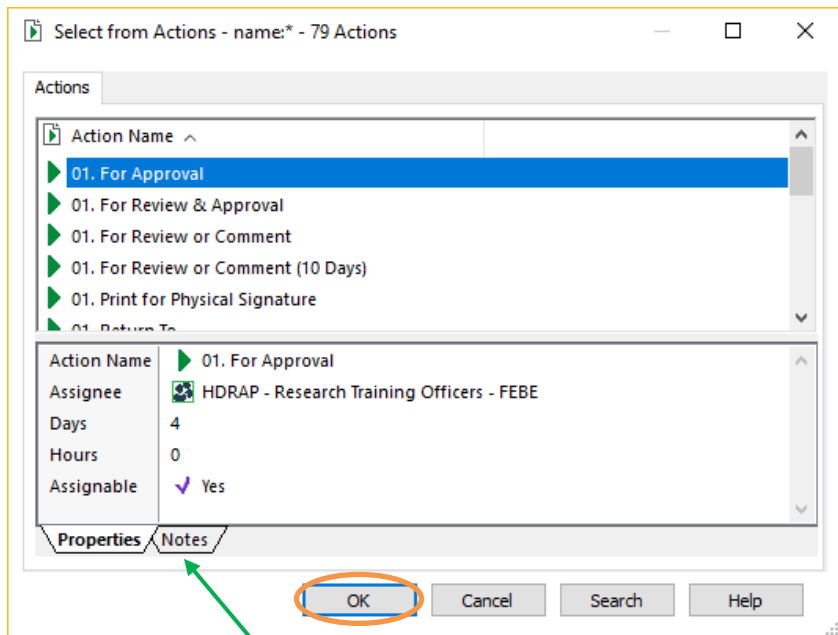
4. **Right-click** anywhere in the white space then select **Add Record Action**:



5. The **'Insert action'** window will display. Click the **magnifying glass** button at the end of the **'Action'** field:





6. The 'Select from Actions' window will appear. Scroll if necessary, to locate the Action which you want to add, click on it once to highlight it blue, then click **OK**:



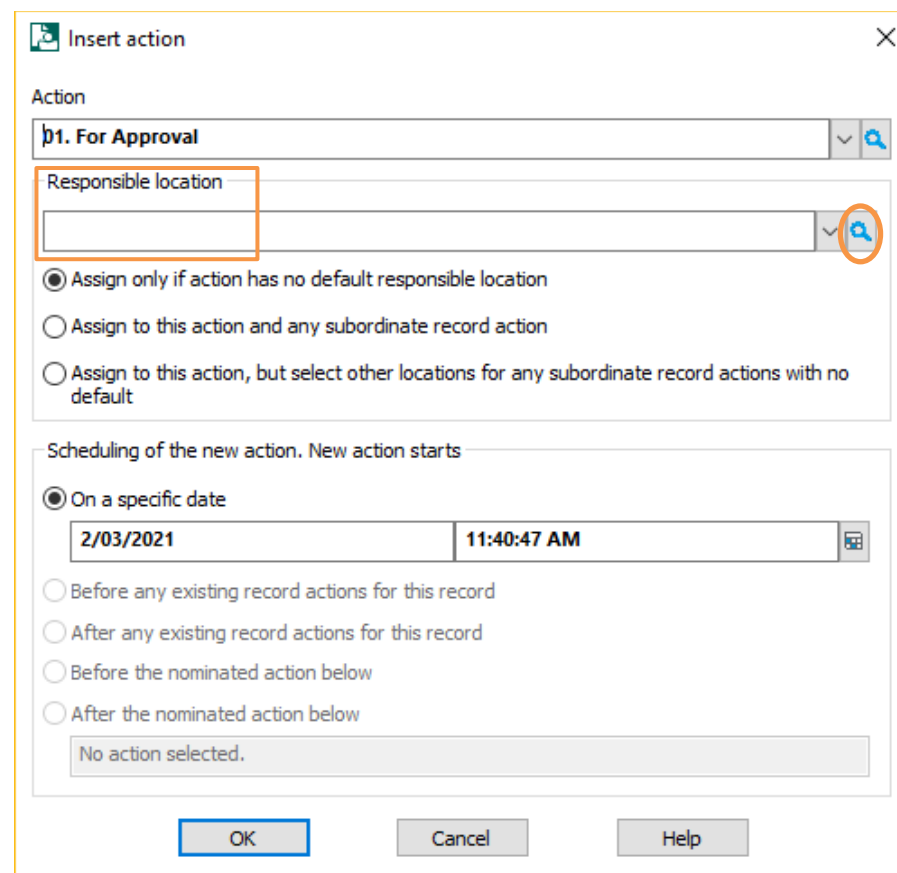
Hint: Clicking on the 'Notes' tab for some Actions will provide information about the purpose of the selected Action.

Hint: When adding an Action to a record, you will notice that each available Action will have one of two icons next to it:

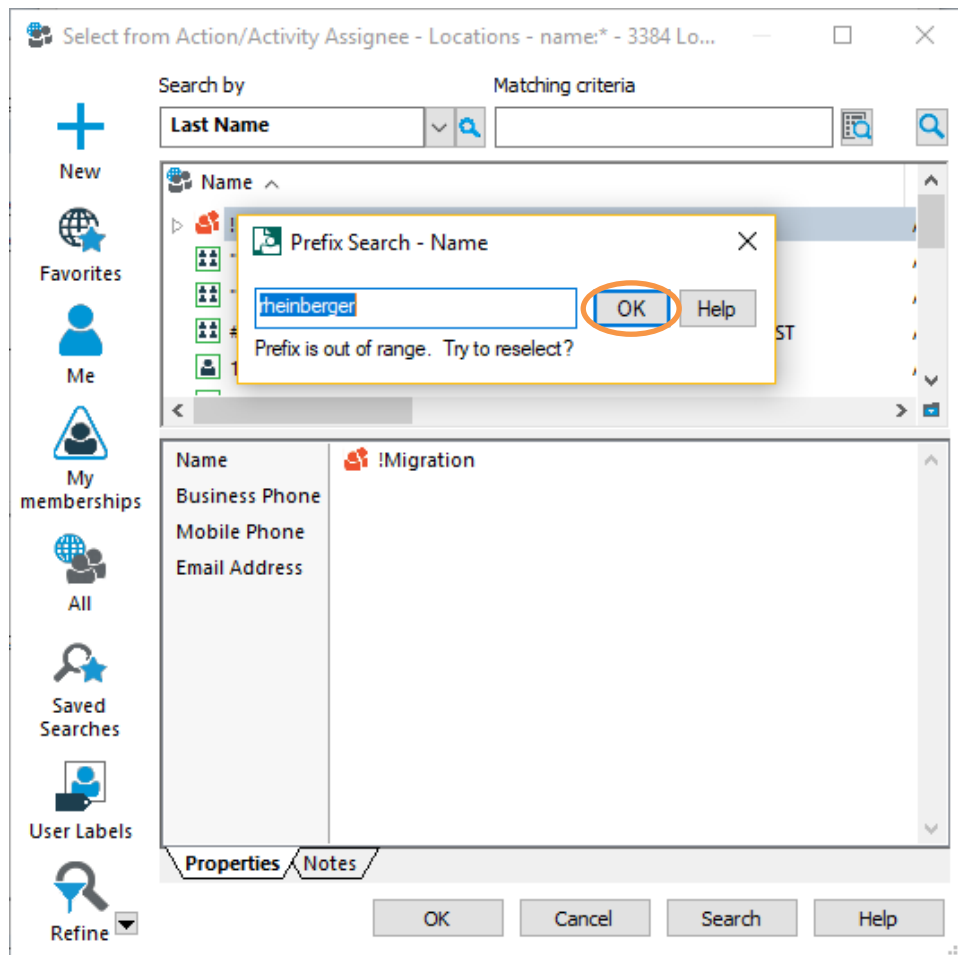
-  Action is a single step/action
-  Action is a linear process/procedure which has multiple 'Action Steps'

7. Next, you need to ensure the 'Responsible location' field is populated as required. Some Actions have default Responsible Locations, therefore this field may be pre-populated for you depending on which Action you have added to the record. If so, you may move forward to [Step 10](#).

However, if you need to populate/update the 'Responsible location' field, first ensure this field is blank, then click on the **magnifying glass** at the end of the field:

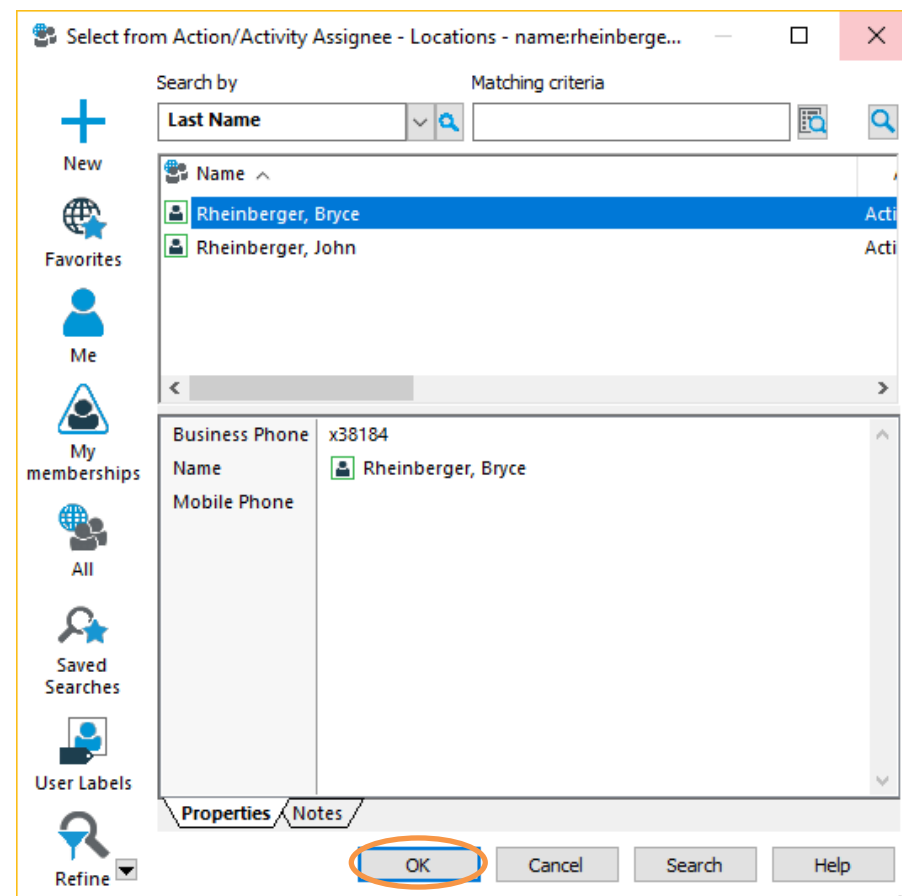


8. The 'Select from Action/Activity Assignee' window will appear. **Don't click anywhere**, but instead just start typing the surname of the person or the name of the Position, Unit/Team, Group you wish to add as the Responsible Location. When you start typing the 'Prefix Search – Name' window will pop up. Click **OK** to run the search:

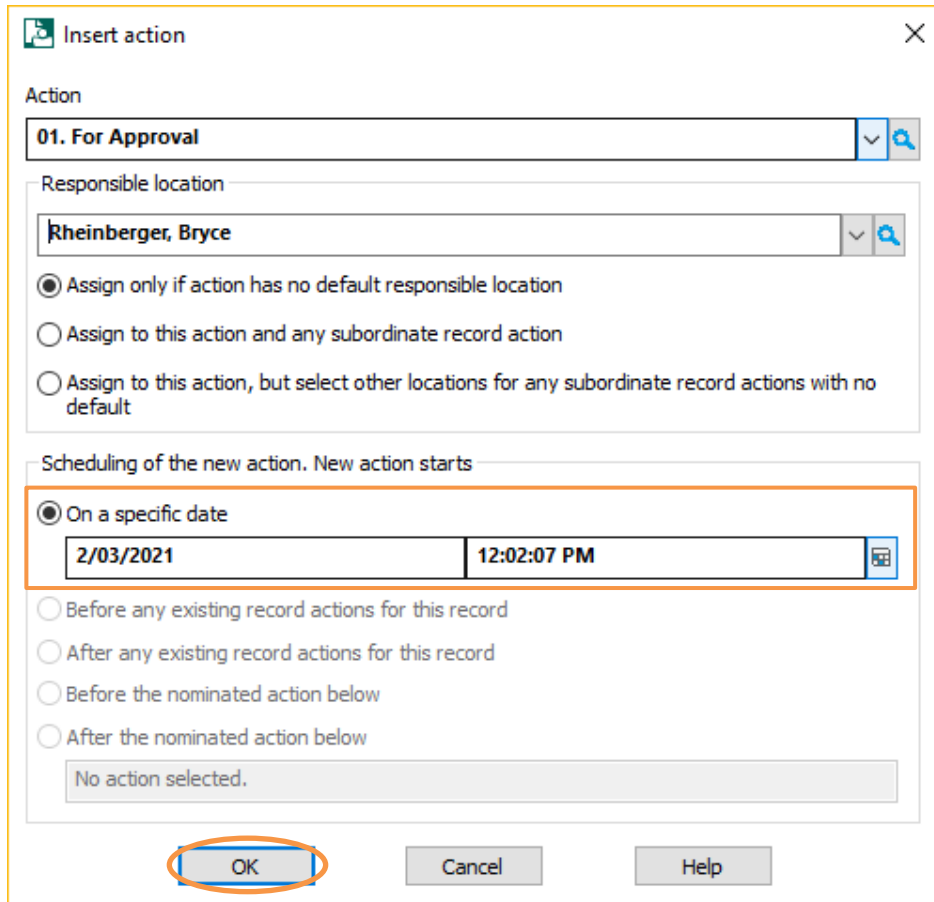


9. The list of matching Locations will appear. Click on the required Location to highlight it blue, then click **OK**:

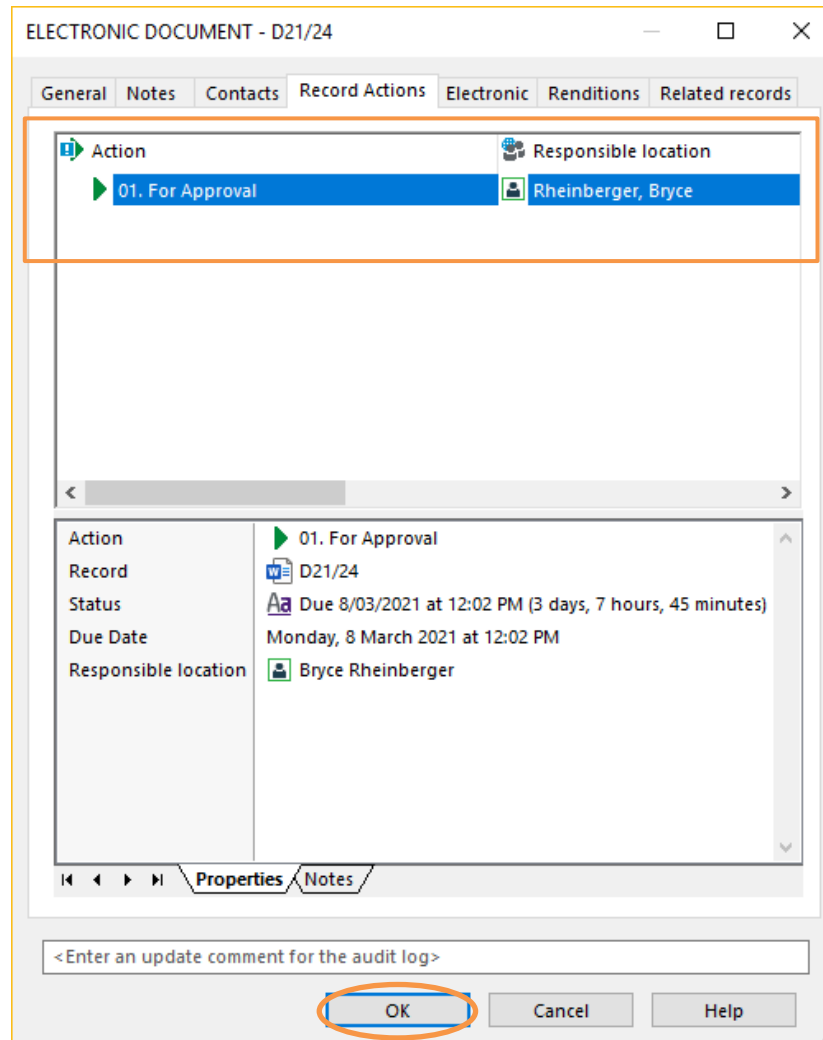
Hint: Only select Locations represented by a green icon.



10. If you would like the Action to start on a specific future date, you can amend the **'On a specific date'** field accordingly. Otherwise, click **OK** to add the Action to the record:



11. You will return to the **'ELECTRONIC DOCUMENT'** window; and will now be able to see the Action you have just added in the top half of this window. Click **OK** to close the **'ELECTRONIC DOCUMENT'** window:



Hint: The Responsible Location will receive an email notification advising them they have an Action to complete.

Appendix A

Available Actions for General Use









Action	Purpose
<p>For Review or Comment</p> <p>3 Days</p>	<p>Use: This Action is designed to be used where review or comment is required. This Action can be used in isolation or in conjunction with the 'For Approval' and 'Print for Physical Signature' Actions.</p> <p>Actions:</p> <ul style="list-style-type: none"> Review the document/s Provide comments Complete the Action in TRIM9 <p>Note: Can also be used in conjunction with 'Return To'</p>
<p>For Approval</p> <p>4 Days</p>	<p>Use: This Action is designed to be used where approval is required. This Action can be used in isolation or in conjunction with the 'For Review or Comment' and 'Print for Physical Signature' Actions.</p> <p>It can also be added multiple times for various levels of approval.</p> <p>Actions:</p> <ul style="list-style-type: none"> Review the document/s If Approved – Complete the Action in TRIM9 If Not Approved – Seek additional information from the originator <p>Note: Can be used in conjunction with 'Return To'</p>
<p>Print for Physical Signature</p> <p>4 Days</p>	<p>Use: This Action is designed for use when a physical signature is required. Before using this Action, consider if the 'For Approval' Action can be used to obtain approval via a digital signature or email approval.</p> <p>Actions:</p> <ul style="list-style-type: none"> Print the document/s Sign Scan the document/s at a minimum 300dpi and place over the original document in TRIM9 Complete the Action in TRIM9 <p>Note: Can also be used in conjunction with 'Return To'</p>

Action	Purpose
<p>Return To</p> <p>2 Days</p>	<p>Use: This Action is designed to be used when you want to be notified that an Action / Approval has been completed.</p> <p>Add this after the last Action and make the Responsible Location either yourself or the person you want to be notified when the Action sequence has been completed.</p> <p>Actions:</p> <ul style="list-style-type: none"> Add this Action at any point in the process where notification is required Complete the Action in TRIM9

Action Tracking Icons and Status Indicators

Action Tracking icons change according to their status:

- Current Actions and Procedures display green arrows
- Completed Actions and Procedures show a tick in a purple box on a green arrow
- Actions and Procedures that are due next show one exclamation mark in a blue box on a green arrow
- Actions and Procedures that are overdue show one exclamation mark in a red box on a green arrow

	Current Procedure
	Next Procedure
	Overdue Procedure
	Completed Procedure
	Current Action Step
	Next Action Step
	Overdue Action Step
	Completed Action Step