Purpose

This document is designed to assist staff with the function of completing an Action in TRIM9.

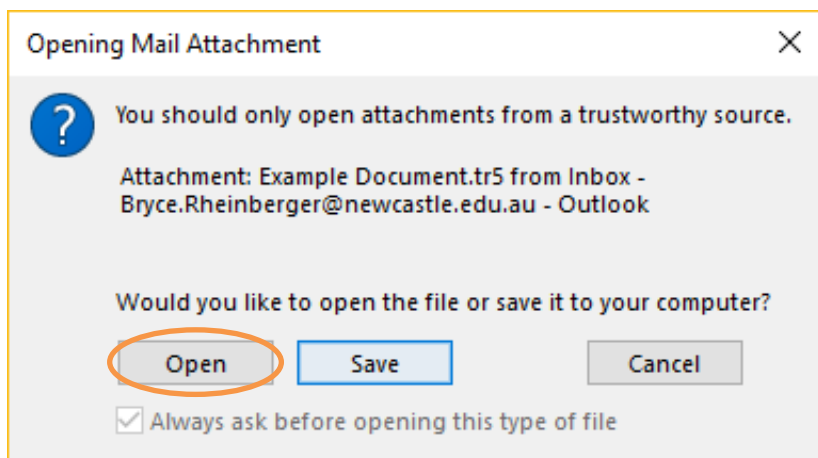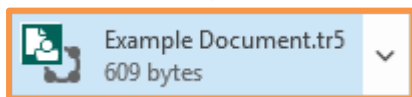## Locating Records Requiring Your Action - Email Notification

When an Action is assigned to you and requires your action, an automatic email notification will be sent to your University of Newcastle email address.

The message Subject will contain the **Status** of the Action (e.g. Current, Overdue etc.) and the **Action** (e.g. For Approval, For Comment etc.)

The email will contain:

- a .tr5 TRIM9 attachment to the Action that requires action
- a .tr5 TRIM9 attachment to the record that the Action is attached to
- a summary of the Action
- Instructions on how to mark the action complete

To open the record in TRIM9; **double-click** the .tr5 TRIM9 attachment (for the record) in the email and select **Open**:


Locating Records Requiring Your Action - Records Due Tray

If you do not have the email with the attachment, you can locate all records with Actions assigned to you and requiring your attention in your Records Due Tray.

1. Ensure the **'Trays'** tab is selected in the **Shortcuts Pane**. At the bottom left of the TRIM9 screen is where you can select between the three Shortcuts tabs:
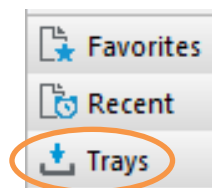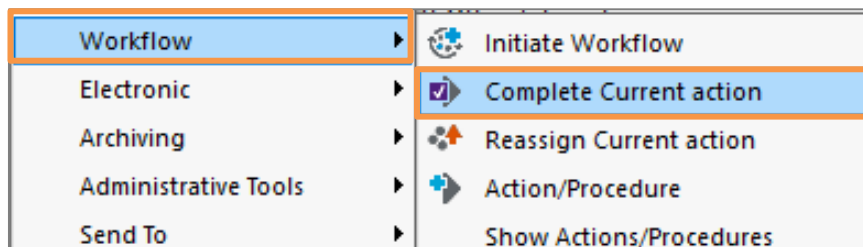

2. Click on the **Records Due** Tray:
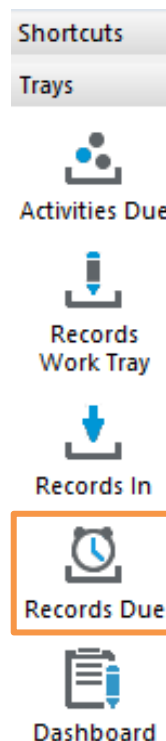
Completing an Action

First, perform whatever task is required of you (For Approval, For Comment, For Review etc.)
for the record in TRIM9. Then:

1. **Right-click** the record in TRIM9 → **Workflow** → **Complete Current Action**

2. A **'Content Manager'** window will appear asking you to confirm that you want to complete the Current Action for that record. Click **OK**:
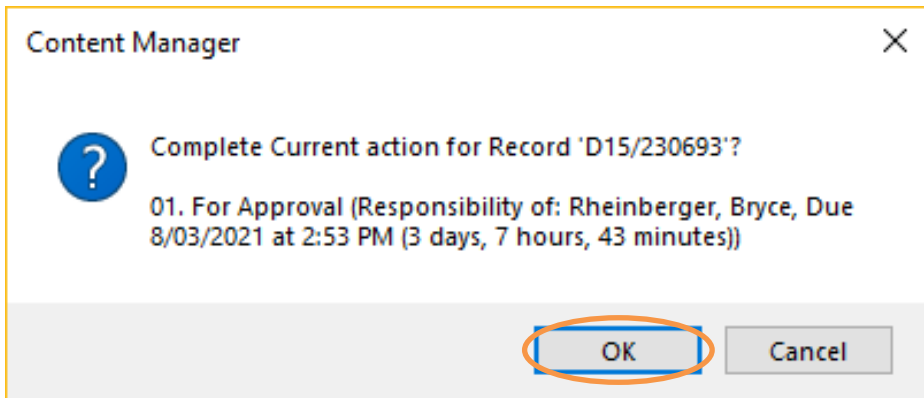
3. Your Action has now been marked as Completed. To view your completed Action, **right-click** the record → **Workflow** → **Show Actions/Procedures**