

## Purpose

This document is designed to assist staff with the function of inserting/adding an Action in a specific spot, to a record that already has Actions assigned to it.

**For example:** If you receive a 'For Approval' Action and you want to add a 'For Review or Comment' Action before you complete the 'For Approval' Action.

## Inserting an Action

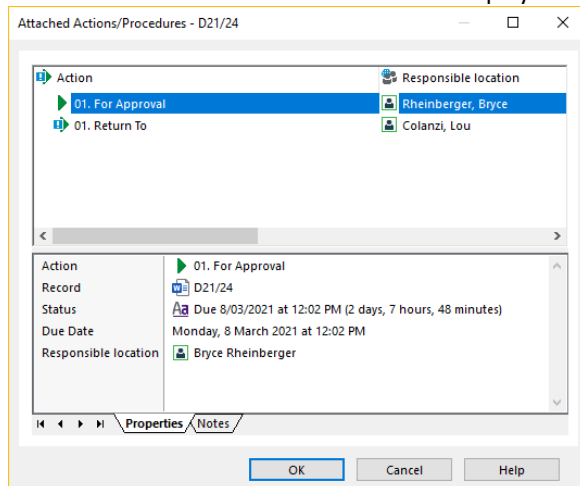
First, locate the record in TRIM9 which has the Action(s) for which you want to insert an additional Action. You can do this by:

- **Double-clicking** the .tr5 TRIM9 attachment (for the record) in the Action email notification and selecting **Open**
- OR
- Navigating to your Records Due Tray in TRIM9

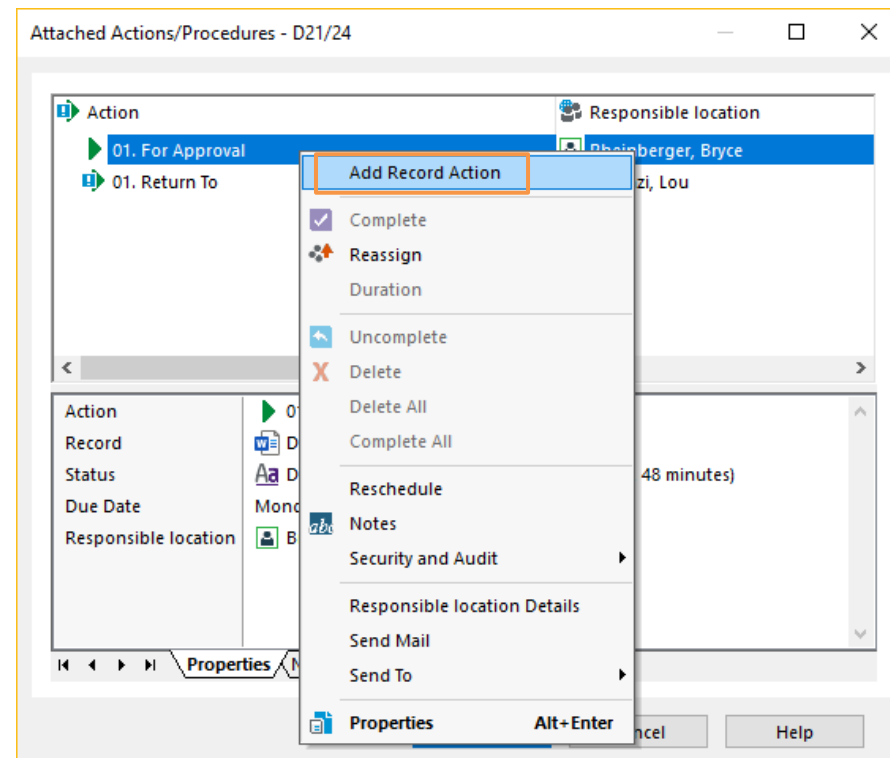
**Hint:** If you require instructions on how to perform either of the above two methods, please refer to the first page of the [TRIM9 - Quick Reference Guide - D15/230693 - Action Tracking - Completing an Action in TRIM9](#).

Then, to insert an Action:

1. **Right-click** on the record → **Workflow** → **Show Actions/Procedures**
2. All Actions attached to the record will be displayed:



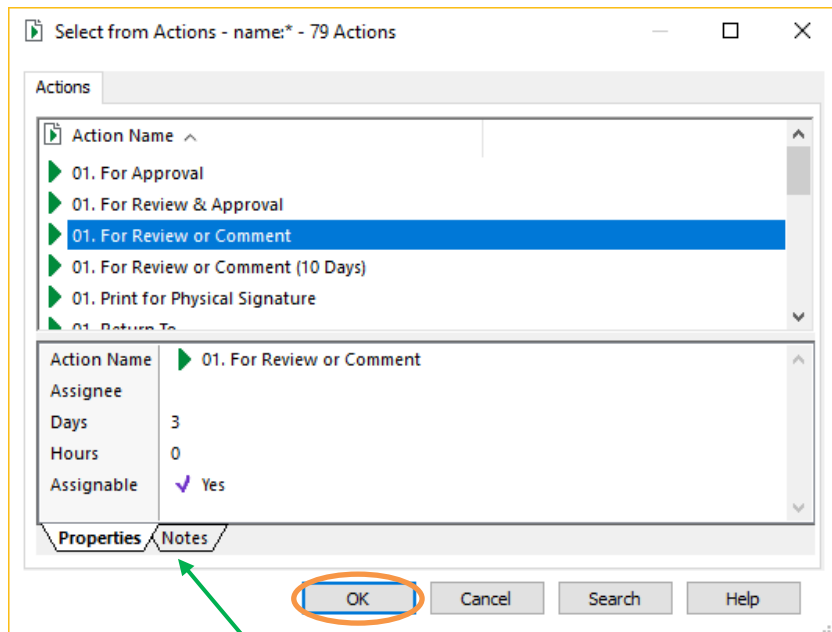
3. **Right-click** on the Action for which you want to insert a new Action before or after, then select **Add Record Action**:



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





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



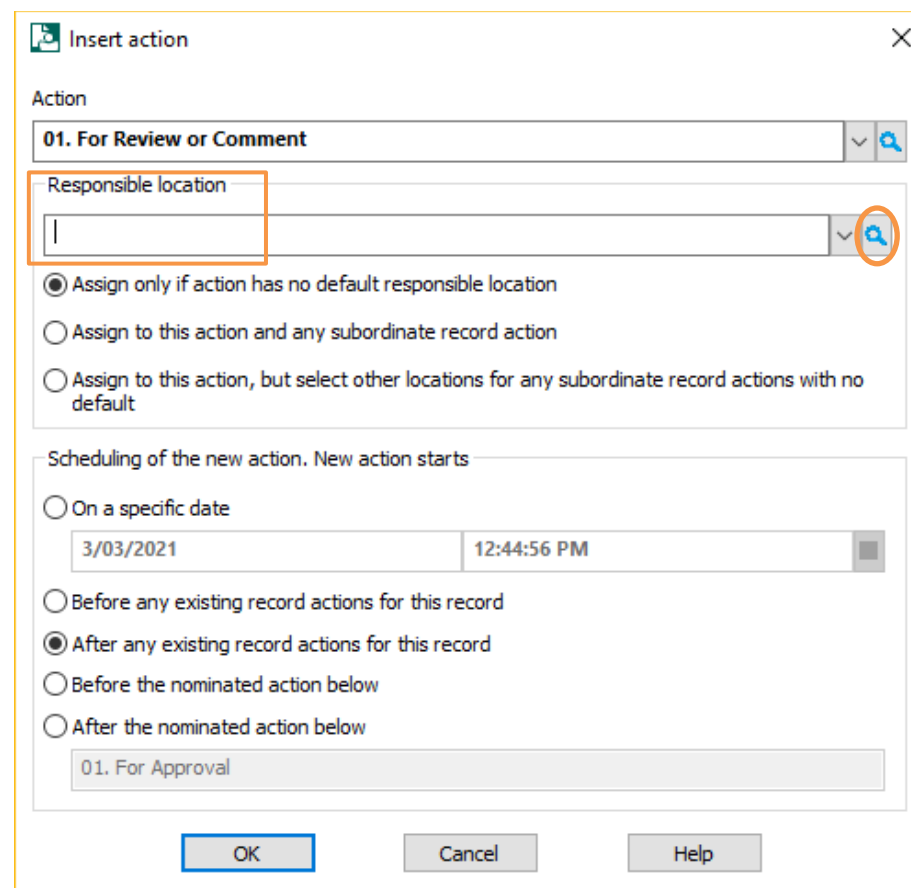
**Hint:** Clicking on the 'Notes' tab for some Actions will provide information about the purpose of the selected Action.

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

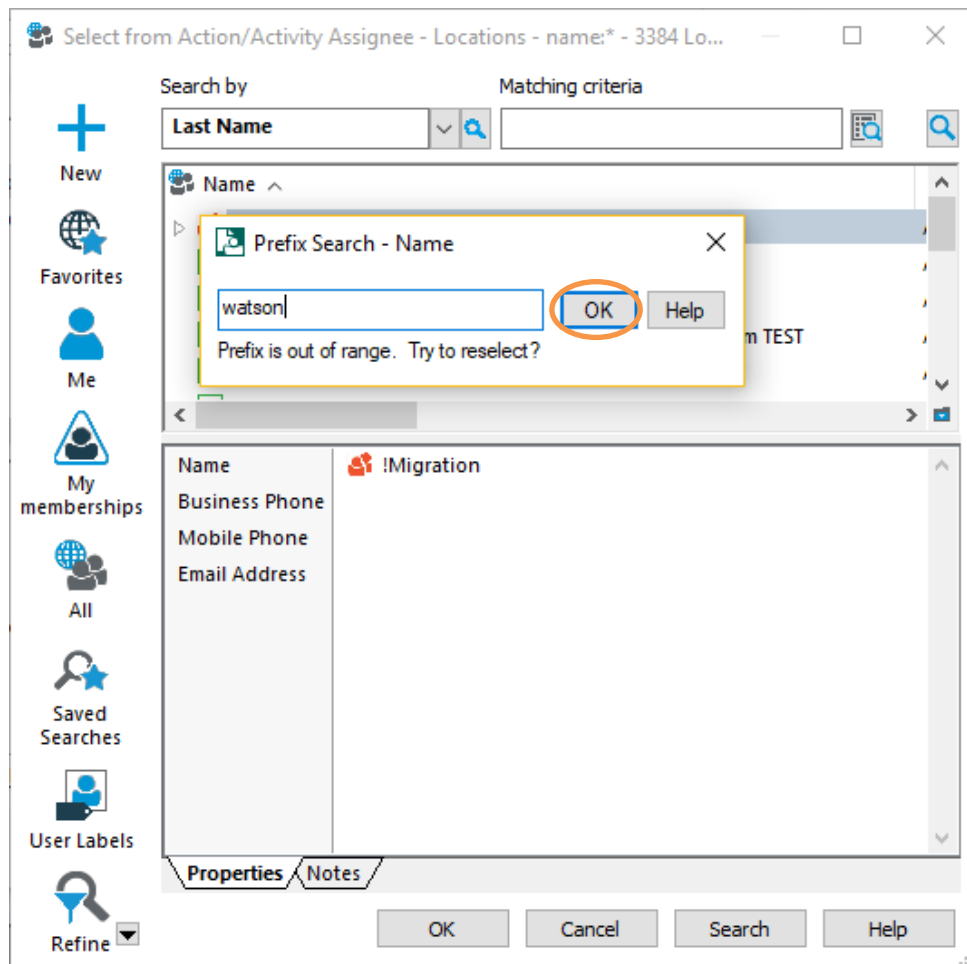
-  Action is a single step/action
-  Action is a linear process/procedure which has multiple 'Action Steps'

6. 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 inserted. If so, you may move forward to [Step 9](#).

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:

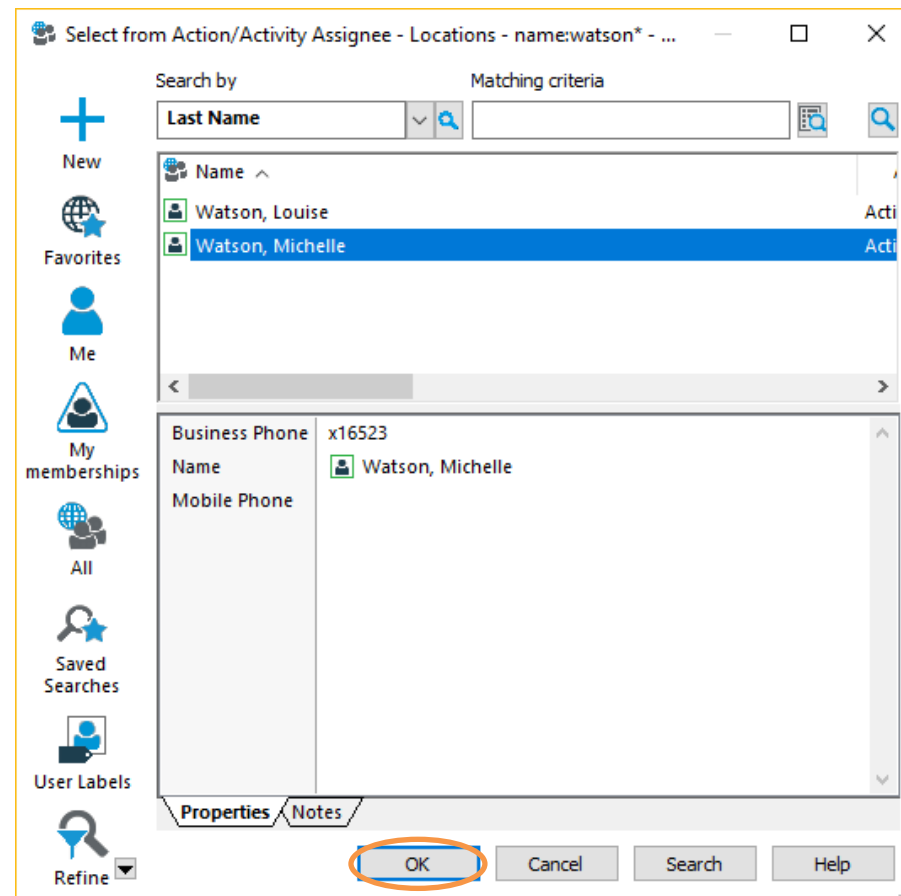


7. The 'Select from Action/Activity Assignee' window will appear. **Don't click anywhere**, but instead just start typing the surname of the person or the name of the Position, Unit/Team, Group you wish to add as the Responsible Location. When you start typing the 'Prefix Search – Name' window will pop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



8. 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.



9. Select the appropriate option for inserting the Action (example below) then click **OK**:

**Insert action**

Action  
01. For Review or Comment

Responsible location  
Watson, Michelle

☒ Assign only if action has no default responsible location  
☐ Assign to this action and any subordinate record action  
☐ Assign to this action, but select other locations for any subordinate record actions with no default

Scheduling of the new action. New action starts

☐ On a specific date  
 3/03/2021 12:44:56 PM

☐ Before any existing record actions for this record  
☐ After any existing record actions for this record  
☒ Before the nominated action below  
☐ After the nominated action below

01. For Approval

OK Cancel Help

**Hint:** If you are selecting either 'Before the nominated action below' or 'After the nominated action below'; the 'nominated action' (as indicated by the arrow) will be the one you right-clicked on in Step 3.

10. The inserted Action will be displayed in the nominated position.

**Note:** The Status and the Due Dates of the other Actions on the record will change depending on the duration of the inserted Action.

Click **OK** to close the '**Attached Actions/Procedures**' window:

Attached Actions/Procedures - D21/24

Action	Responsible location	Status
01. For Review or Comment	Watson, Michelle	Due 5/03/2021 at 12:02 PM (1 day, 6 hours, 24 minutes)
01. For Approval	Rheinberger, Bryce	Due 11/03/2021 at 12:02 PM (5 days, 12 hours, 24 minutes)
01. Return To	Colanzi, Lou	Due 15/03/2021 at 12:02 PM (7 days, 12 hours, 24 minutes)

Properties Notes

01. For Review or Comment

Record D21/24

Status Due 5/03/2021 at 12:02 PM (1 day, 6 hours, 24 minutes)

Due Date Friday, 5 March 2021 at 12:02 PM

Responsible location Michelle Watson

OK Cancel Help