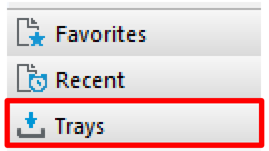
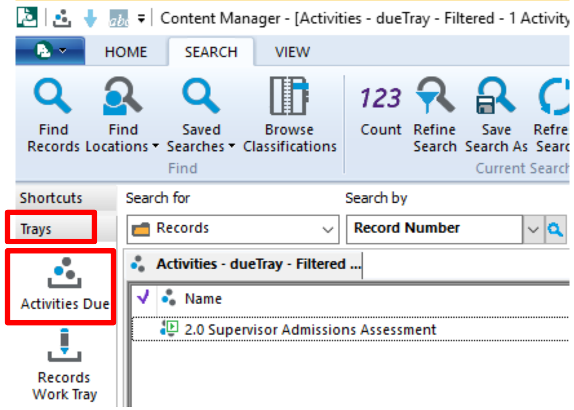
Quick Reference Guide – HDR TRIM9 Workflows – School Staff

This Guide covers the following topics relating to the use of the HDR TRIM9 Workflows:

1. Access Current Activities

Current Activities assigned to you or your Position will be in your **Activities Due** tray. You can locate them via the **Trays** tab in the **Shortcuts** bar on the left-hand side of your TRIM9 screen:

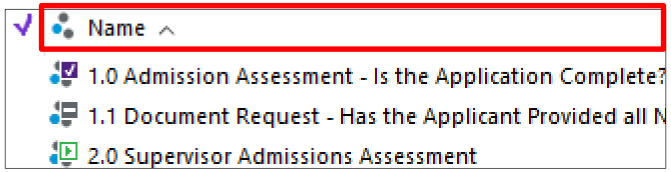




2. Navigation

At times you may need to view all Activities (and their current status) within an applied workflow process:

1. Right-click on the required HDR Admissions & Scholarship Sub-Folder or HDR Candidature Variation record.
2. Select **Workflow → Show Activities**



Hint: Ensure activities are in process order by left clicking on **the Name** column header

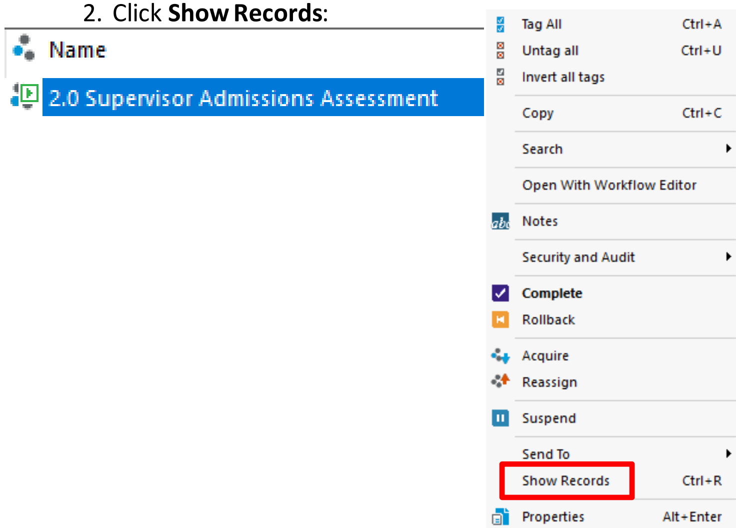
3. Show Records/Applications (HDR Admissions Process)

To navigate to the application and associated documents from the Current Activity:

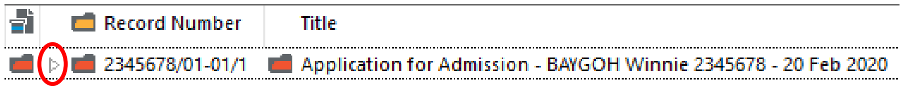
1. Right-click on the Activity

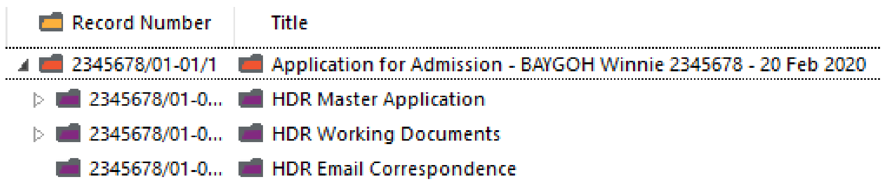
NB: do not double-click on the Activity to open the records; this may complete the Activity

2. Click **Show Records**:



3. The red HDR Admissions & Scholarship Sub-Folder will display. Click the **triangle** next to the folder to see its contents:





***NB:** the 'HDR Master Application' sub-folder will contain the full admissions assessment PDF form that requires updating/approval (Activity 2.0 onwards).*

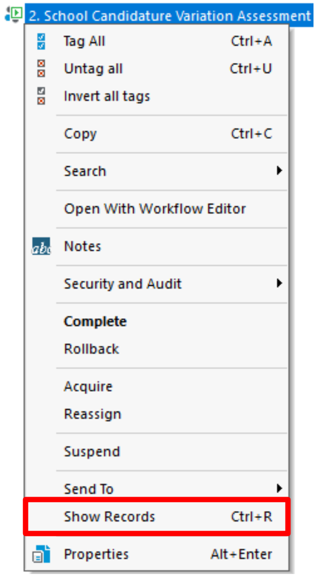
3. Show Records/Applications (HDR Candidature Variation Process)

To navigate to the Candidature Variation and associated documents from the Current Activity:

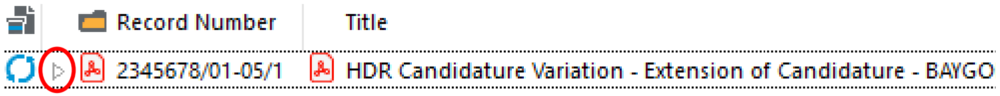
1. Right-click on the Activity

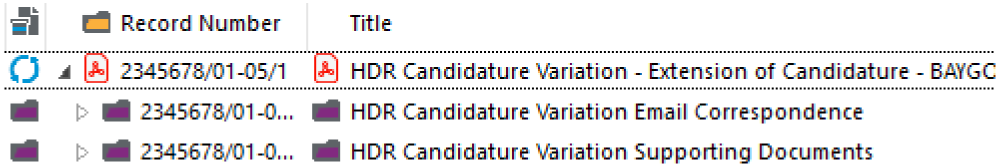
NB: Do not double-click on the Activity to open the records; this may complete the Activity

2. Click **Show Records**:



3. The blue Candidature Variation record will display. This record is the PDF which requires updating/approval. Click the **triangle** next to the record to see its contents:

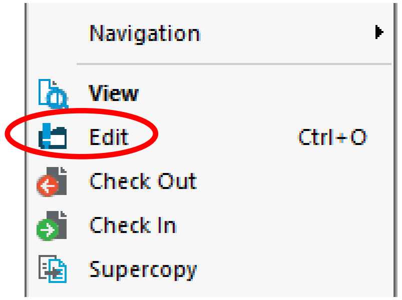




***NB:** Supporting documentation, including evidence of compassionate or compelling circumstances, will be stored in the **Supporting Documents** sub-folder.*

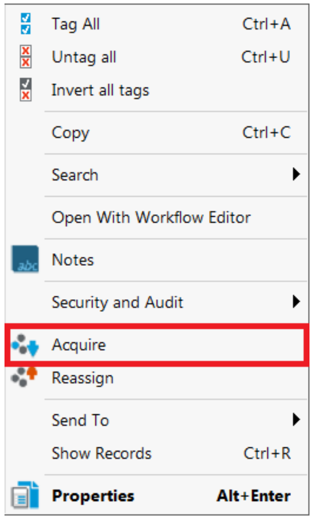
4. Edit a Document

1. Locate the record which you want to edit/update (as per instructions in Section 3).
2. Right-click on the record and select **Edit**:



3. The document will open in its native application (E.g. Adobe) and will automatically be 'Checked Out' from TRIM9.
4. Work on the document the same as you would if you were working from your desktop or shared drive. Once you have finished editing, save the document and close. The document will check back in automatically.

5. Acquire Activities



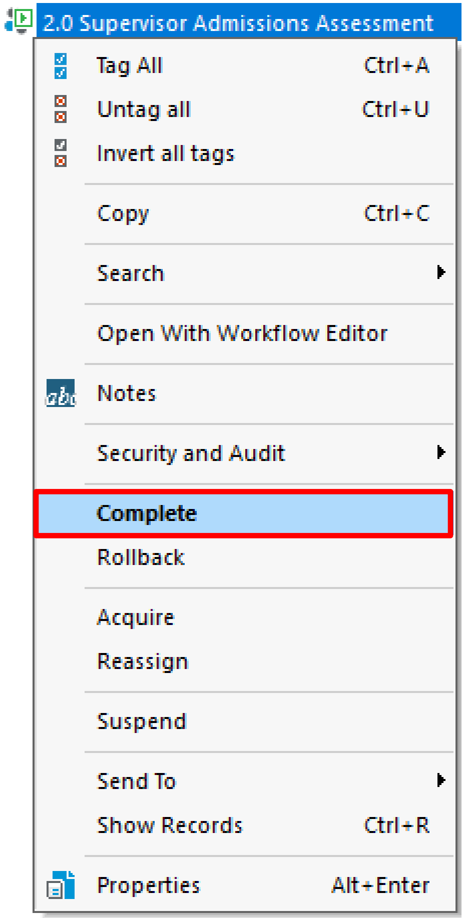
The Workflow Module is based on Positions (not People) and as such workflow Activities will be assigned to a Position. If an Activity is assigned to your Default Position then you will **not** need to acquire it first in order to perform actions on these Activities (complete etc.). However, if an Activity is assigned to a Position you are a member of (but it is not your Default Position) then you must first **Acquire** the Activity before you can perform an action on it. An example of this might be if your School has two Workflow Positions (one for Admissions and one for Candidature Variations) and you belong to both. Because only one can be your Default Position, you would need to acquire any Activities assigned to the Workflow Position which isn't your Default Position in order to perform an action on it such as complete it.

To acquire an Activity:

1. Right-click on the Activity
2. Click on **Acquire**

6. Complete Activities

1. Go to your Activities Due tray and locate the Activity that pertains to the application you're currently working on.
2. Right-click on the Activity
3. Click on **Complete**:



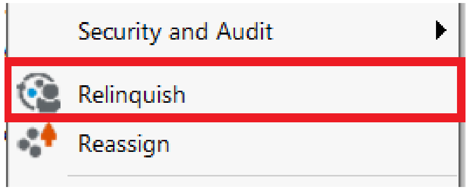
NB: *Once complete, the icon on the Activity will change to a tick*

7. Relinquish an Acquired Activity

You should relinquish an Activity only after you have acquired it and become aware that you will not be available to complete the Activity (I.e. if you are going on leave).

Relinquishing an Activity will reassign it back to the original Group Position Assignee so another team member can complete the Activity.

1. Right-click on the Activity
2. Click on **Relinquish**:

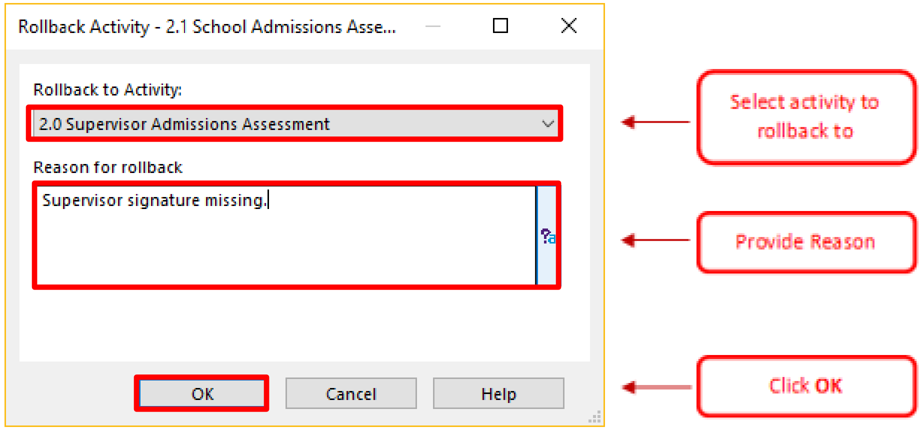


8. Rollback Workflow Activities

Rollback enables you to roll the Workflow back to an Activity preceding the Current Activity.

1. Right-click on the Activity

2. Click on **Rollback** *(The **'Rollback Activity'** window will be displayed):*

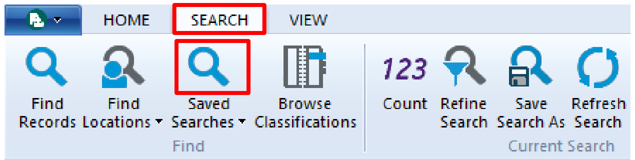


***NB:** If you do not see the option of **Rollback** in your drop-down menu you will have to first reassign the Current Activity to your Position – you can do this by using the **Reassign** option found by right-clicking on the Activity – then perform the rollback steps above. Once rolled back, **Relinquish/Reassign** the Activity back to the original Position holder.*

9. Access Saved Searches

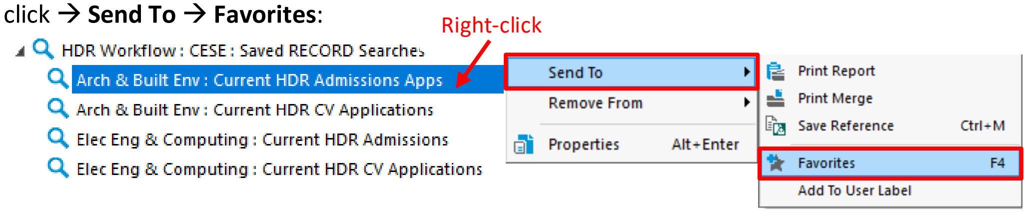
A number of saved searches have been configured to enable you to run reports and statistics.

1. Click the ‘**SEARCH**’ tab
2. Click on the **Saved Searches magnifying glass**:

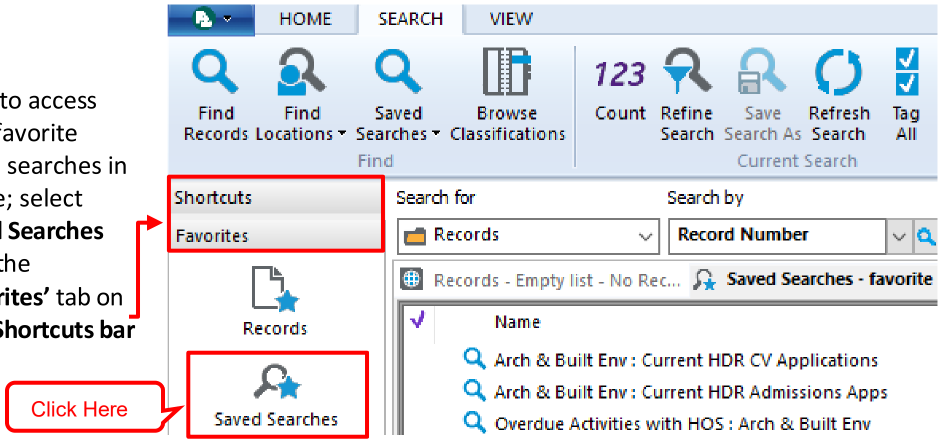


This will provide a list of all previously created and saved searches in TRIM9 that you have appropriate access controls to see. ***NB:*** *Saved searches pertaining to these workflows either begin with ‘**HDR Workflow**’ or they are contained within a Search Group which begins with ‘**HDR Workflow**.*

You may need to scroll to locate the saved search(es) that applies to your School. When you have located them, add them to your favorite saved searches via right-click → **Send To** → **Favorites**:



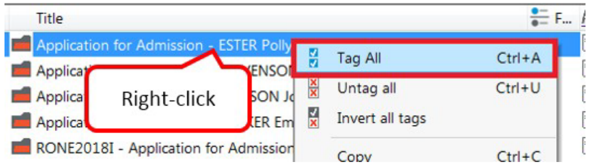
Then to access your favorite saved searches in future; select **Saved Searches** from the ‘**Favorites**’ tab on your **Shortcuts bar**



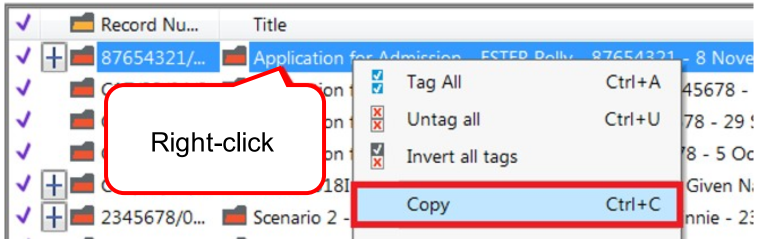
10. Running Saved Searches and Exporting Saved Search Results

The easiest way to export saved search results is to copy and paste the data into an Excel Spreadsheet.

1. To run a saved search, double-click on it (results will be displayed in a list).
2. Right-click on any of the records returned in your search.
3. Click **Tag-All**:



4. Right-click again on any of the records and select **Copy**. You will be prompted to confirm the copy and confirm to copy all records:



5. Open a new blank **Excel Spreadsheet** (or if this is something you will do regularly you may like to create an Excel Spreadsheet template with appropriate column titles and formatting) and **paste** the data:

Current HDR Admissions Applications - School of Architecture and Built Enviroment					
Record Number	**Title**	**College**	**School**	**Application Received**	**Status of Application**
87654321/17-01/1	Application for Admission - ESTER Polly - 87654321 - 8 November 2020	College of Engineering, Science and Environment	School of Architecture and Built Environment	8/11/2020	With DOGR or DVCRI
12345678/17-01/1	Application for Admission - STEVENSON Laura - 12345678 - 3 October 2020	College of Engineering, Science and Environment	School of Architecture and Built Environment	3/10/2020	Ready for Confirmation of Enrolment (CoE)
32165498/17-01/1	Application for Admission - SAMSON John - 32165498 - 15 November 2020	College of Engineering, Science and Environment	School of Architecture and Built Environment	15/11/2020	Ready for Confirmation of Enrolment (CoE)
12365478/17-01/1	Application for Admission - BARKER Emily - 12365478 - 14 August 2020	College of Engineering, Science and Environment	School of Architecture and Built Environment	14/08/2020	With DOGR or DVCRI
98745632/17-01/1	Application for Admission - FRAPPLES Bob - 98745632 - 28 September 2020	College of Engineering, Science and Environment	School of Architecture and Built Environment	28/09/2020	Ready for Confirmation of Enrolment (CoE)

NB: *This will copy and paste the same columns displayed in your TRIM9 screen into the Excel columns. If you require different data ensure you add/remove the appropriate columns in TRIM9 prior to copying.*

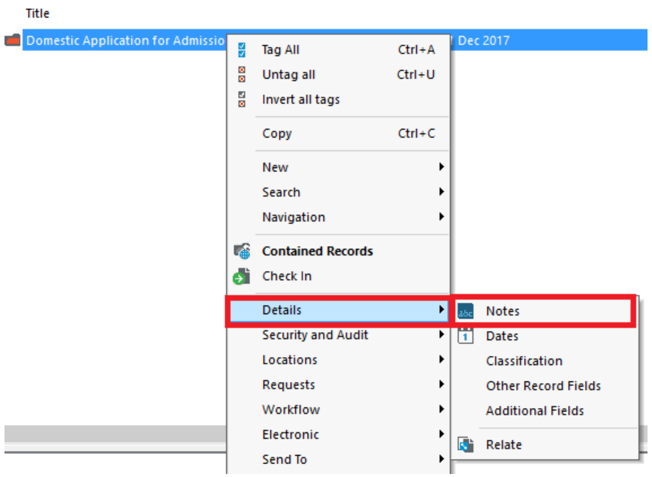
11. Add Notes

Adding a Note allows you to share key information on an applicant's file with other TRIM9 users. It is recommended that Notes are placed on the red HDR Admissions and Scholarship Application for Admission folder or blue HDR Candidature Variation record (depending on which process you're currently working on).

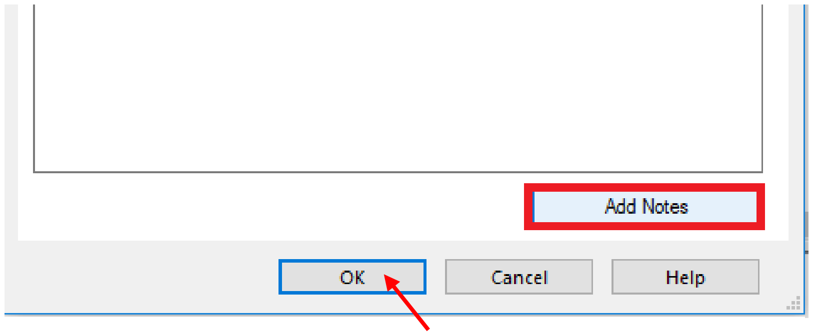
1. Locate the red HDR Admissions and Scholarship Application for Admission folder or blue HDR Candidature Variation record (see Section 3. Show Records/Applications)

2. Right-click on the folder/record

3. Click on **Details** → select **Notes**:



4. Click **Add Notes**



5. Type your Note in the box then click **OK**