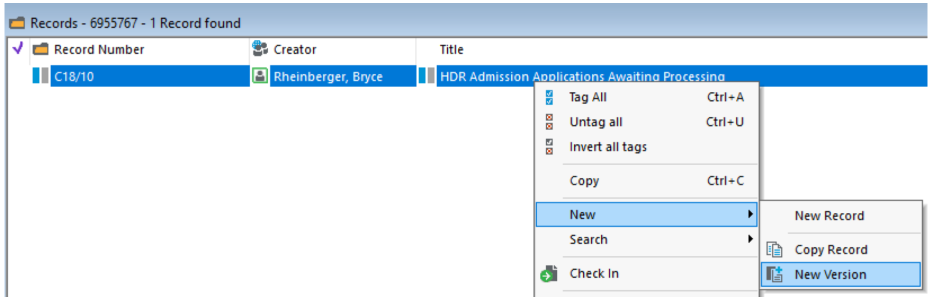
Quick Reference Guide – HDR Admissions Workflows – UON GR Staff

This guide covers the following topics relating to the use of the TRIM Workflow Module:

1. Create a new application	9. Rollback Workflow Activities
2. Assign a new workflow	10. Access Saved Searches
3. Access Current Activities	11. Export Saved Search Results
4. Navigation	12. Restrict Access to Sub-Folders
5. Show Records/Applications	13. Cross-Faculty Authorisation
6. Acquire Activities	14. Combine multiple PDF docs
7. Complete Activities	15. Add Notes
8. Relinquish an Acquired Activity	16. Add a Status/Outcome

1. Create a New Application

HDR Applications are received via ODA and will initially be stored within the 'HDR Admission Applications Awaiting Processing' cabinet in TRIM. A new application folder will need to be created within the cabinet. See below for example:

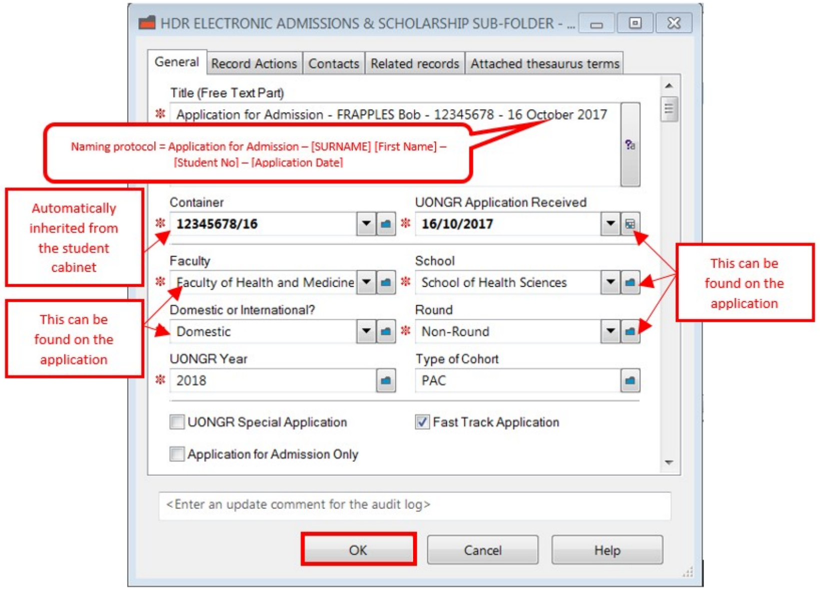


1. Locate the **HDR Admission Applications Awaiting Processing cabinet** (record number C18/10)

2. Right click on the **HDR Admission Applications Awaiting Processing** cabinet then → Click **New** → Click **New Record** (This will open the **'Create New Record'** window).

3. Select the **HDR ADMISSIONS & SCHOLARSHIP SUB-FOLDER** from the list → Click **OK**

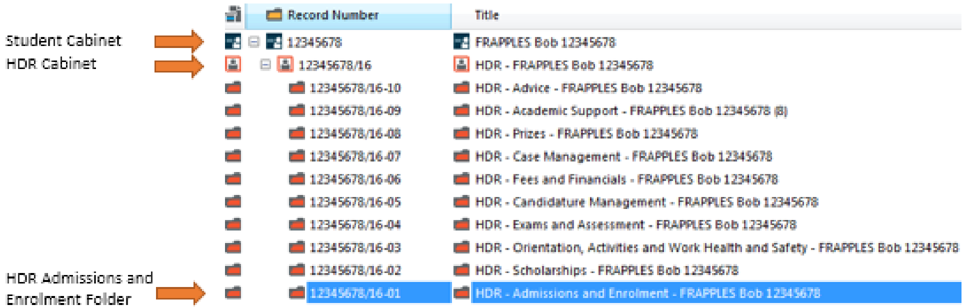
4. Populate the mandatory metadata fields → Click **OK. NB:** the naming convention for the folder Title will include the Round or Non-Round cohort type at the start, i.e. *RTWO 2018 D/I depending on domestic or international) - Application for Admission*. (The 'UONGR Year' is the Round year or, in the case of Non-Round applications, the year of submission.)



5. Save the application documents into the **Working Documents** subfolder. This can be done via a 'drag and drop'. **NB:** personal documents should be stored in the **Applicant Personal Documents** (sub)sub-folder.

<u>Once the student has been registered in Nustar, a student cabinet will automatically be generated in TRIM, and the Application for Admission folder can be transferred across.</u>

6. Locate the student cabinet and the **HDR – Admissions and Enrolment** folder



7. With the application folder also visible in another window, transfer the Application for Admission / Scholarship folder (and all its subfolders and documents) across via 'drag and drop' to the **HDR – Admissions and Enrolment** record

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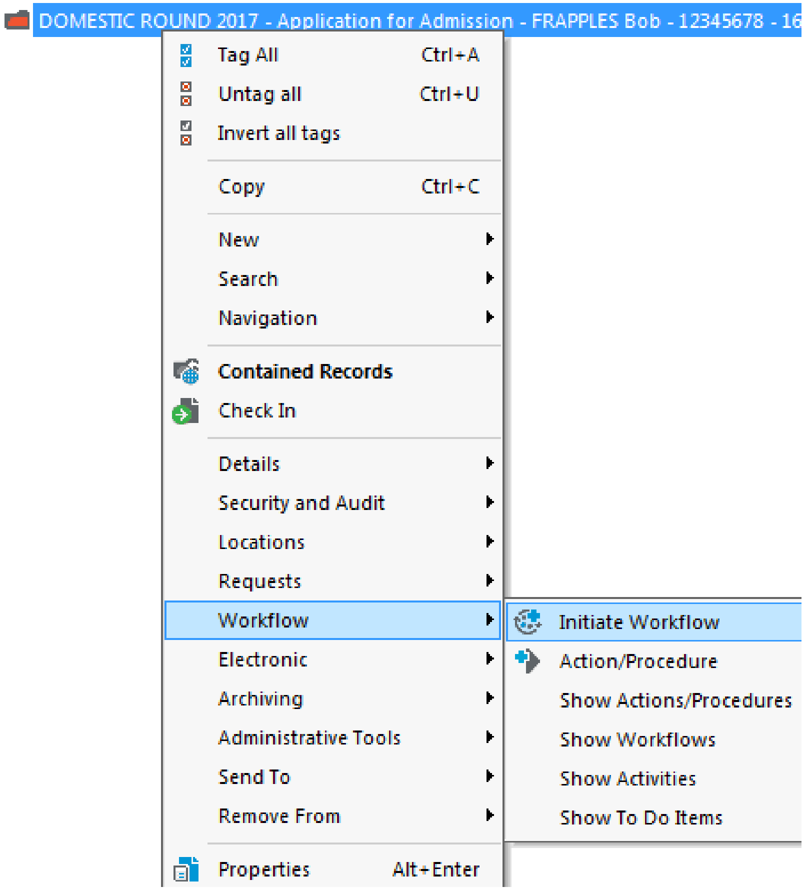
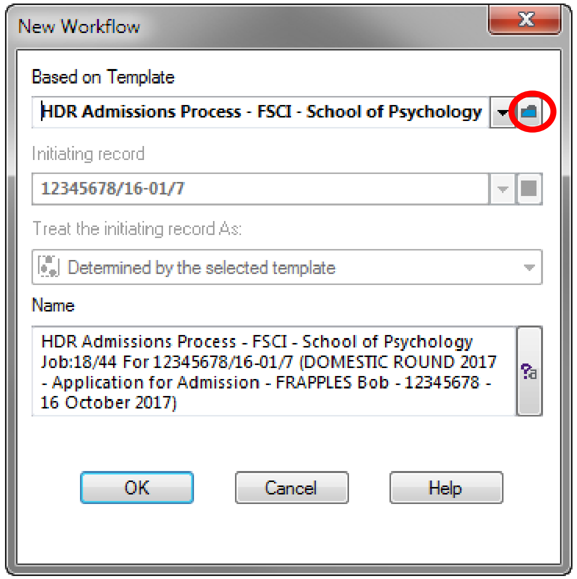
2. Assign a New Workflow

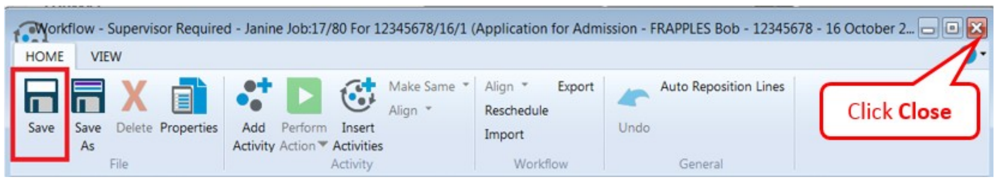
1. Right-click on the new **Student Admissions / Scholarship Folder**
2. Click **Workflow** → Click **Initiate Workflow** to display the **New Workflow** window



3. Click the blue **kwik select** button under '***Based on Template***' and choose the required workflow template from the list (based on Faculty and School the application pertains to. Then Click **OK**

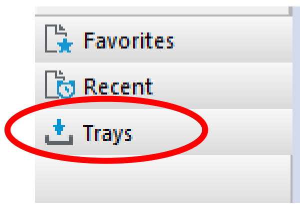


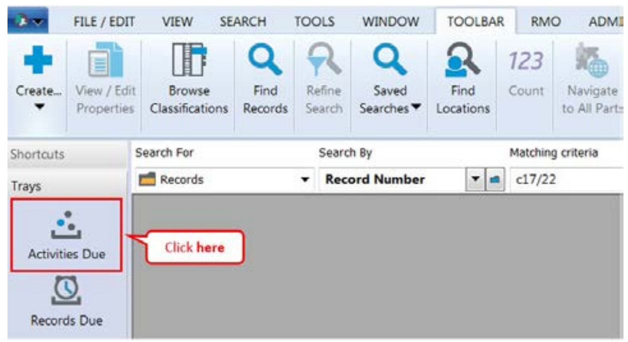
4. The **Workflow Editor** will display the chosen workflow process in pictorial view. Click **Save** and then close the editor to apply the chosen workflow.



3. Access Current Activities

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





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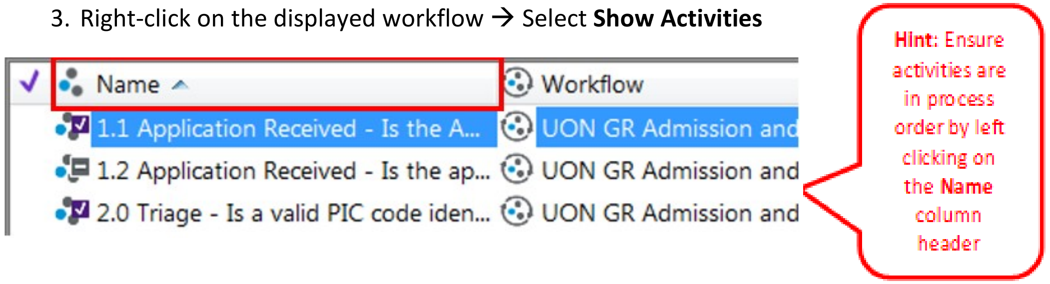
4. Navigation

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
2. Select **Workflow → Show Workflows**
3. Right-click on the displayed workflow → Select **Show Activities**

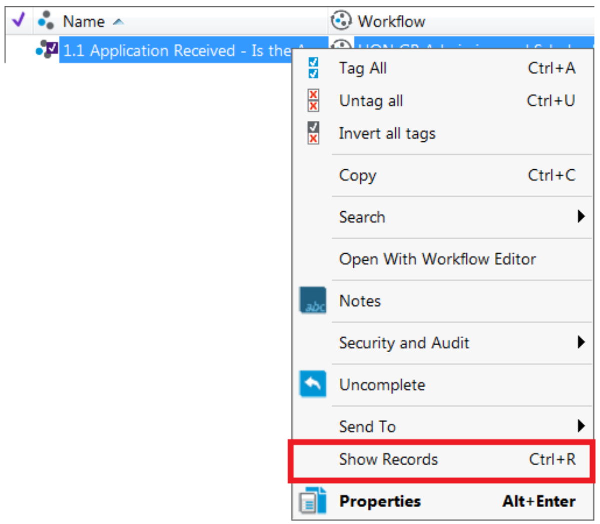


Note: if you don't need to see the Workflow (I.e. you just need to see the Activities) you can right-click on the HDR Admissions & Scholarship Sub-Folder, then select **Workflow → Show Activities**

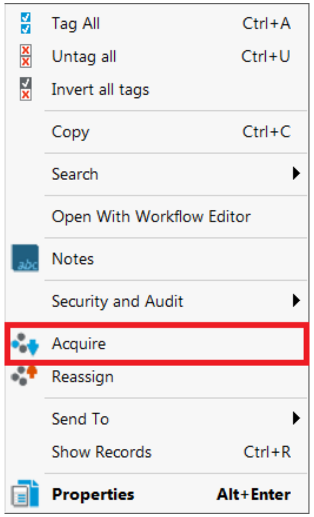
5. Show Records/Applications

To navigate to the application and associated documents from the current activity:

1. Right-click on the activity
2. Click **Show Records**



6. Acquire Activities



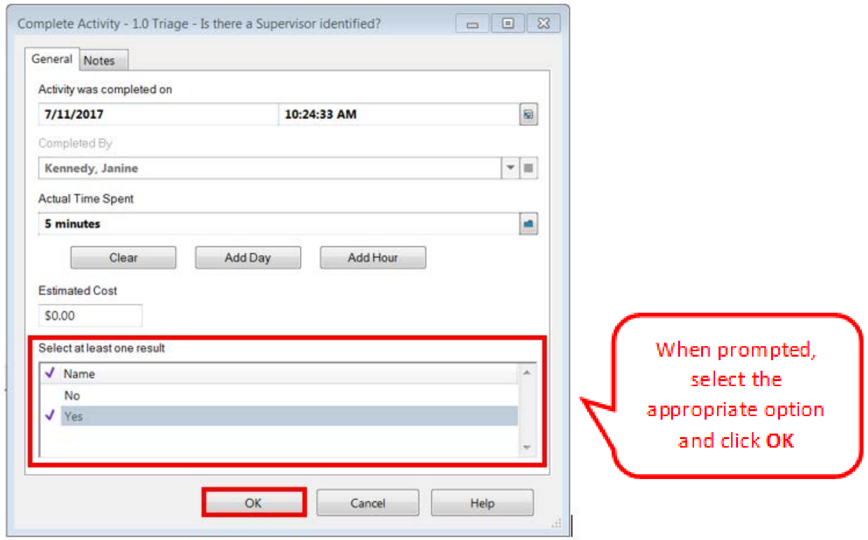
The Workflow Module is based on positions (not people) and as such workflow activities will be assigned to a position. If an activity is assigned to your default position then you will **not** need to acquire it first in order to perform actions on these activities (complete etc.). However, if an activity 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 an RTO for a Faculty needed to complete an activity on behalf of their ADRT. To acquire an Activity:

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

7. Complete Activities

1. Right-click on the activity
2. Click on **Complete.** *Once complete, the icon on the activity will change to a tick*

   *(**NB** - some activities will require the user to select an option (such as Yes or No) in order to complete the action. Please see below example)*



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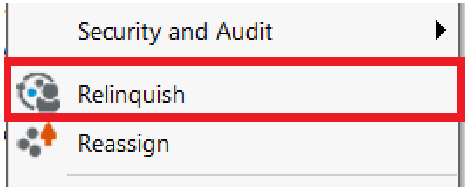
8. Relinquish an Acquired Activity

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 on leave).

Relinquishing an activity will reassign it back to the original group position assignee so another team member can acquire and complete the activity.

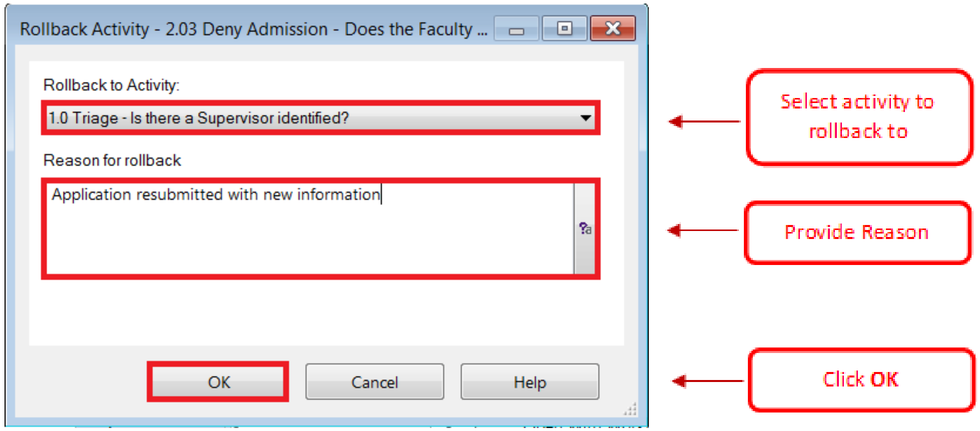
1. Right-click on the activity
2. Click on **Relinquish**



9. Rollback Workflow Activities

Rollback enables you to roll the Workflow back to an activity's predecessor.

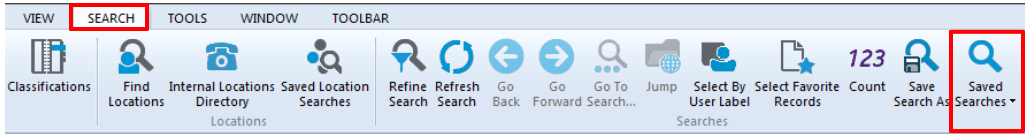
1. Right-click on the activity
2. Click on **Rollback** *(The Rollback Activity window will be displayed)*



10. Access Saved Searches

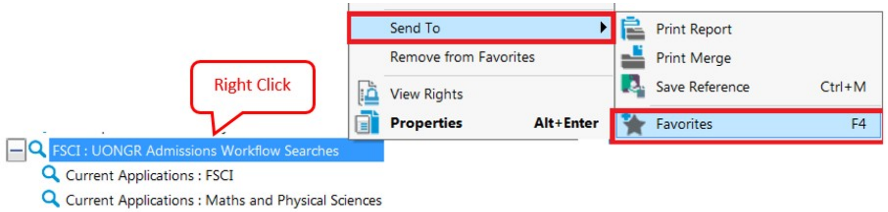
A number of saved searches have been configured to enable you to run reports and statistics.

1. Click the **Search** tab
2. Click on **Saved Searches**

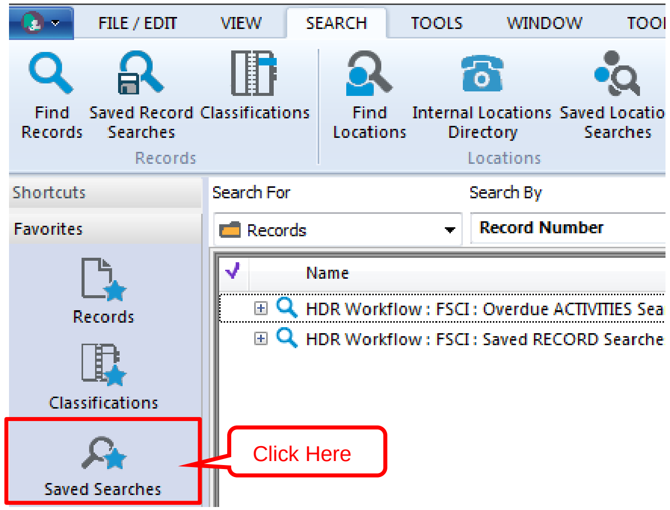


This will provide a list of all previously created and saved searches in TRIM that you have appropriate access controls to see. ***Note:*** *the titles of saved searches pertaining to this workflow begin with '**HDR Workflow**'*

Once you have located the saved search(es) that applies to your Faculty, School, Department etc. add them to your favorite saved searches via the below instructions:



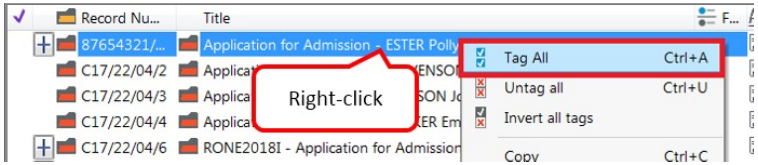
To access your favorite saved searches; select **Saved Searches** from the **Favorites** tab on your Shortcuts bar



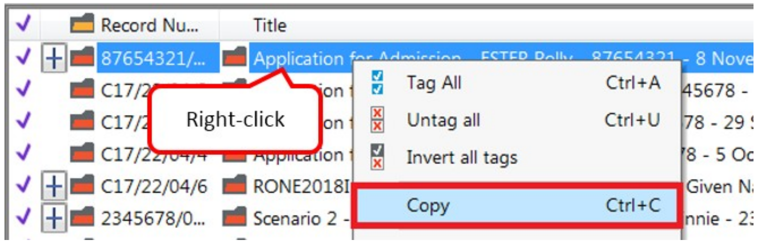
11. Export Saved Search Results

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

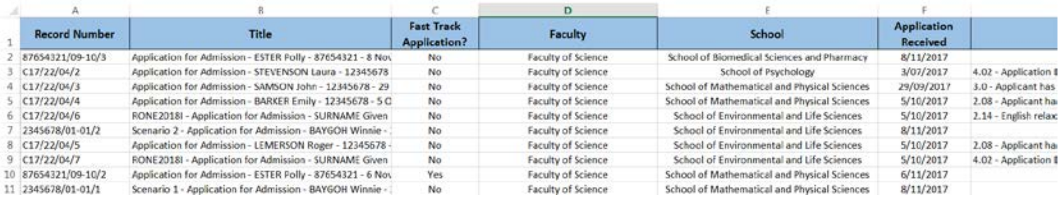
1. Run your saved search by double clicking on the required search (results will be displayed in a list)
2. Right-click on any of the records returned in your search
3. Click **Tag-All**



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



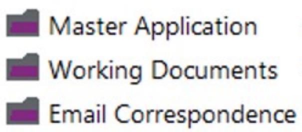
5. Open a new blank **Excel Spreadsheet** and **paste** the data



	A	B	C	D	E	F	
1	Record Number	Title	Fast Track Application?	Faculty	School	Application Received	
2	87654321/09-10/3	Application for Admission - ESTER Polly - 87654321 - 8 Nov	No	Faculty of Science	School of Biomedical Sciences and Pharmacy	8/11/2017	
3	C17/22/04/2	Application for Admission - STEVENSON Laura - 12345678	No	Faculty of Science	School of Psychology	3/07/2017	4.02 - Application
4	C17/22/04/3	Application for Admission - SAMSON John - 12345678 - 29	No	Faculty of Science	School of Mathematical and Physical Sciences	29/09/2017	3.0 - Applicant has
5	C17/22/04/4	Application for Admission - BARKER Emily - 12345678 - 5 C	No	Faculty of Science	School of Mathematical and Physical Sciences	5/10/2017	2.08 - Applicant ha
6	C17/22/04/6	RONE2018I - Application for Admission - SURNAME Given	No	Faculty of Science	School of Environmental and Life Sciences	5/10/2017	2.14 - English relax
7	2345678/01-01/2	Scenario 2 - Application for Admission - BAYGOH Winnie -	No	Faculty of Science	School of Environmental and Life Sciences	8/11/2017	
8	C17/22/04/5	Application for Admission - LEMERSON Roger - 12345678 -	No	Faculty of Science	School of Environmental and Life Sciences	5/10/2017	2.08 - Applicant ha
9	C17/22/04/7	RONE2018I - Application for Admission - SURNAME Given	No	Faculty of Science	School of Environmental and Life Sciences	5/10/2017	4.02 - Application
10	87654321/09-10/2	Application for Admission - ESTER Polly - 87654321 - 6 Nov	Yes	Faculty of Science	School of Mathematical and Physical Sciences	6/11/2017	
11	2345678/01-01/1	Scenario 1 - Application for Admission - BAYGOH Winnie -	No	Faculty of Science	School of Mathematical and Physical Sciences	8/11/2017	

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

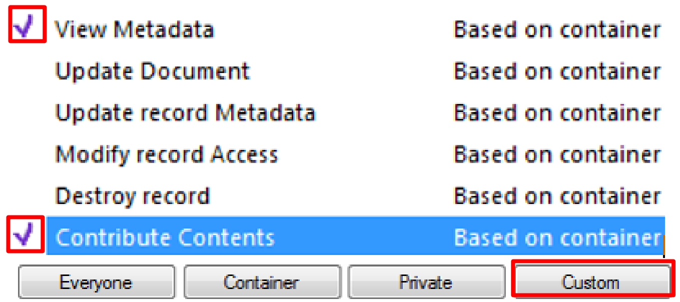
12. Restrict Access to Sub-Folders



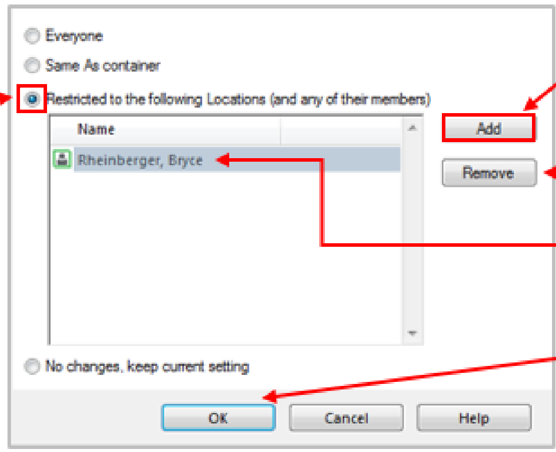
Contained within each **HDR Admissions & Scholarship Folder** are 3 subfolders:

At times you may need to lock down access and restrict the ability to see or contribute additional documents to a sub-folder (most likely the 'Working Documents' sub-folder).

1. Right-click on the required sub-folder
2. Click on **Security and Audit → Security/Access**
3. a) If you want to lock down the ability <u>to add documents</u> to the 'Working Documents' sub-folder; under **Access Controls** place a **tick** next to **Contribute Contents →** click **Custom**
   b) If you want to lock down the ability <u>to see</u> the 'Working Documents' sub-folder; under **Access Controls** place a **tick** next to **View Metadata →** click **Custom**



4. Click here



5. Click **Add →** The **Select from Locations** window will appear

6. Search for **UON Graduate Research →** Click **OK**

7. Highlight your name and click **Remove**

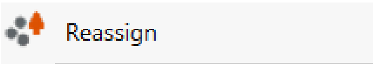
8. Click **OK** when **UON Graduate Research** has been added and your own name is removed

13. Cross-Faculty Authorisation (Activity 4.15 and 4.16)

For some applications cross-faculty authorisation is required when processing. If so, activities 4.15 and 4.16 will be activated and will require you to reassign to the appropriate Head of School (HOS) and Assistant Dean of Research Training (ADRT) respectively for whichever second School/Faculty is required to authorise the application.

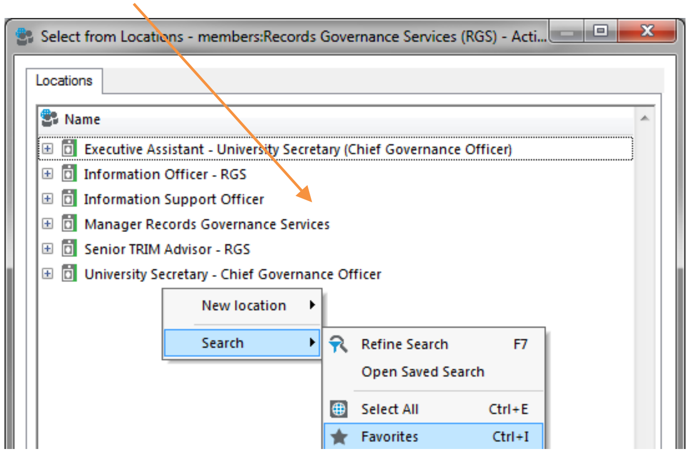
NB: This task is a lot easier if the 'HDR Admissions Process – UON Graduate Research Admission Process – Group Accounts' Location has been added to your TRIM Favourite Locations. For instructions on how to do this please refer to TRIM Document *D18/65010 : 'Quick Reference Guide - HDR TRIM Workflow - Adding the Group Accounts Location to your Favourites'*.

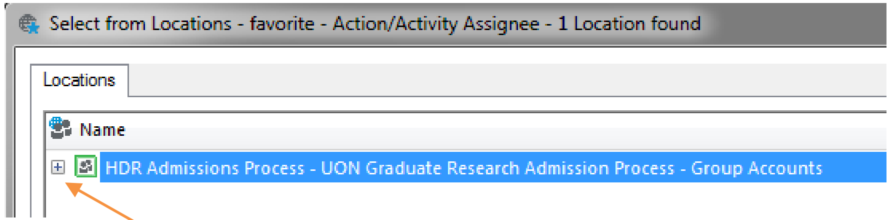
To reassign Activities for Cross-Faculty Authorisation:

1. Navigate to the workflow activities
2. Right-click on **Activity 4.15 (Cross Faculty Admissions Assessment 1/2)**
3. Click **Reassign** 

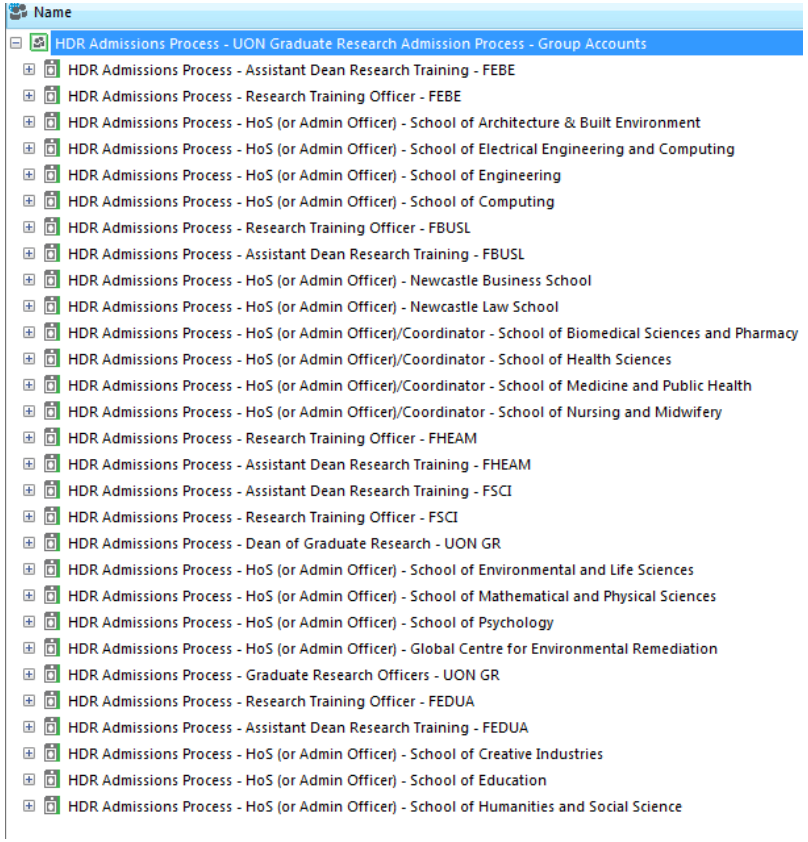
(The Select from Locations window will appear)

If you have added the 'HDR Admissions Process - UON Graduate Research Admission Process - Group Accounts' Location to your Favourites as per the advice above then it should appear on screen. If your Favourites don't appear; right-click in the top half of the window → Search → Favourites:





4. Once the 'Group Accounts' Location displays, clicking on the + will show you every position in TRIM which pertains to the HDR TRIM Workflow:



NB: If you would prefer to see the positions which pertain to the HDR TRIM Workflow in alphabetical order you can right-click on the top 'Group Accounts' location → Search → Member Locations:

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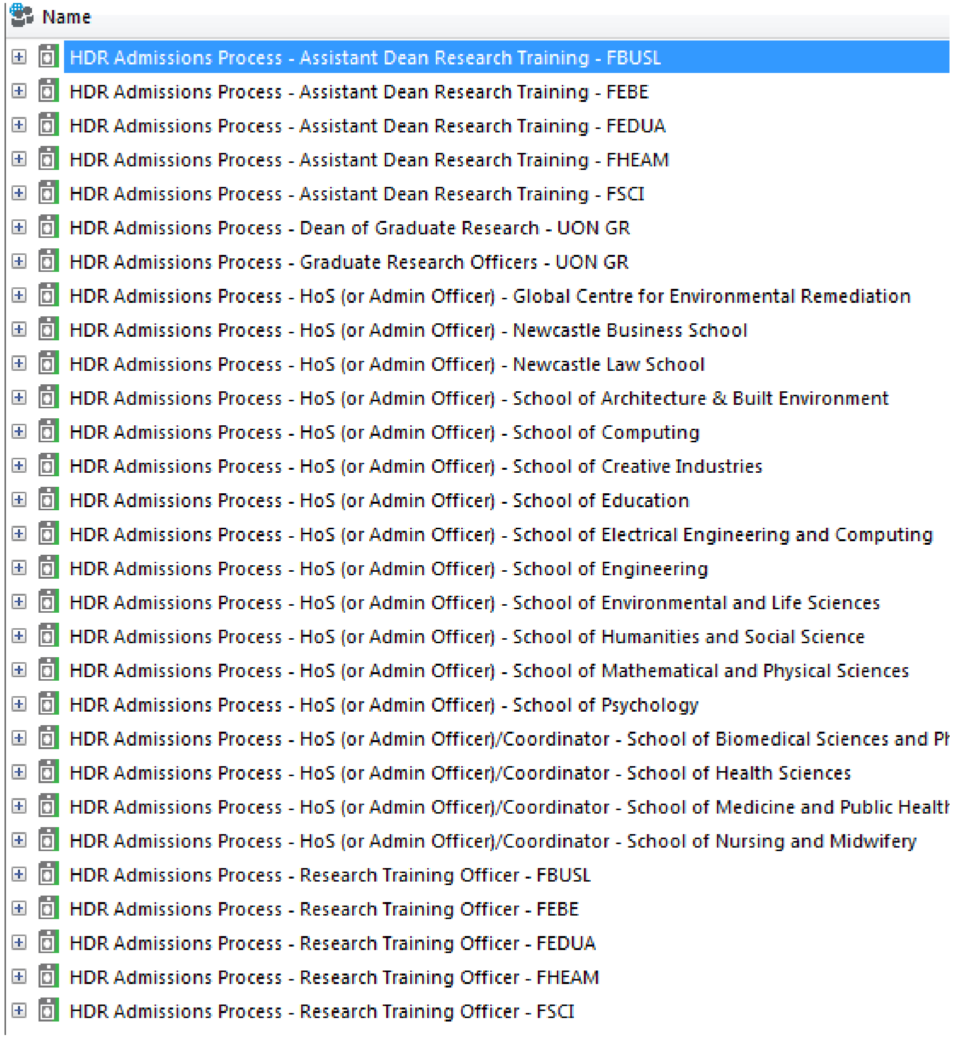
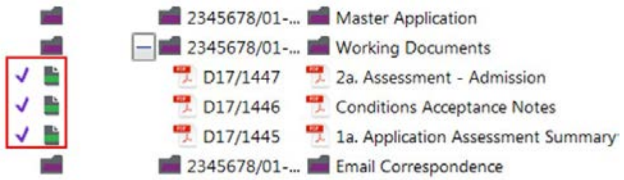


5. Select the appropriate **HOS location** → Click **OK**
6. **Repeat for Activity 4.16 (Cross Faculty Admissions Assessment 2/2)**, this time selecting the appropriate **ADRT location.**

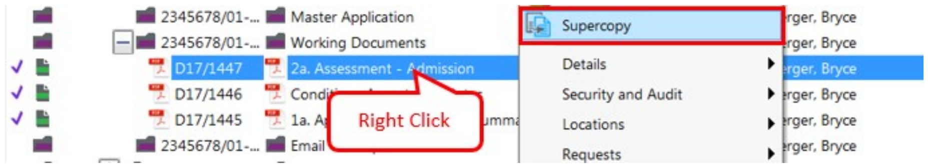
14. Combine Multiple PDF Documents from TRIM

This task may be performed when the **working documents** in TRIM are combined to create the **master copy** of the application.

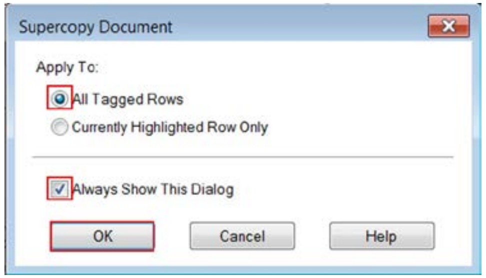
1. Locate the required PDFs in the **Working Documents** subfolder
2. Place a **tick** to select all PDF records you want to combine



3. Right-click on any of the PDF images → Click **Supercopy**



4. You will be prompted to confirm the supercopy - Ensure **All Tagged Rows** is selected, and that **Always Show This Dialog** is ticked, then Click **OK**

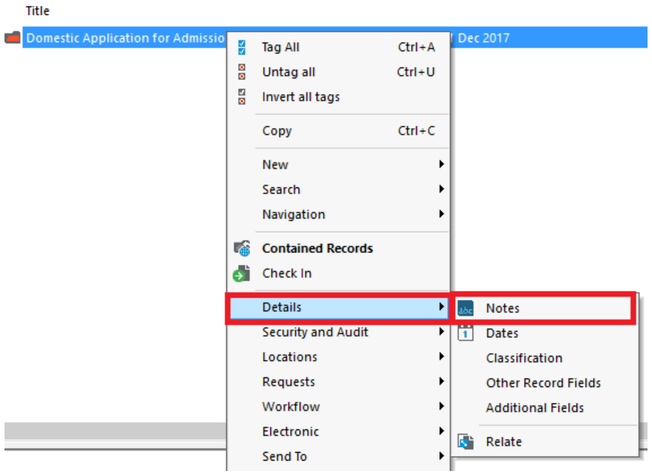


5. Choose a location to copy the PDF images to (Desktop is fine)
6. Use **Adobe Acrobat** to combine the PDF images into one document
7. Drag and Drop the new PDF into the **Master Application** sub-folder as a new document.

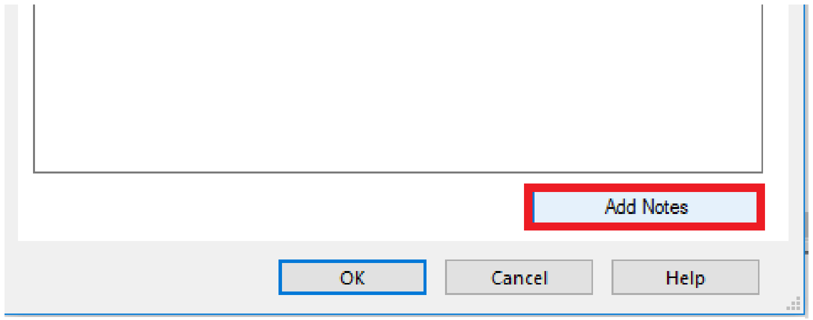
15. Add Notes

Adding a Note allows you to share key information on an applicant's file with other TRIM users. It is recommended that Notes are placed on the Application for Admission folder.

1. Locate the application record (see 3. Show Records/Applications)
2. Right-click on the folder
3. Click on **Details** → select **Notes**



4. Click **Add Notes**

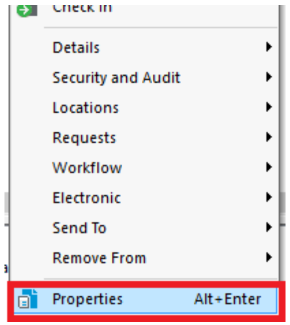


5. Add a note in the box and click **OK**

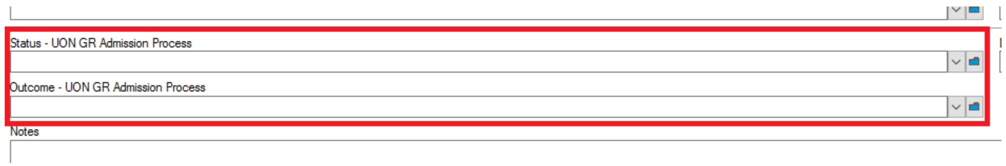
16. Add a Status/Outcome

There a range of statuses and outcomes that may be applied to a record throughout the application process. These are indicated in the Flightplan document.

1. Locate the application record (see 3. Show Records/Applications)
2. Right-click on the folder
3. Click on **Details** → select **Properties**



4. Maximize the window and ensure the **Status – UON GR Admission Process** or **Outcome – UON GR Admission Process** field is clear (if it is not clear the full range of statuses/outcomes may not appear in the next step)



5. Click the blue kwik select button to the right of the field.
6. Select the relevant status/outcome, Click **OK**
7. If a Status has been added: Add today's date to the **Date Status Field Last Updated** field

NB: a similar process applies to the adding of other metadata information within the Properties screen.