Quick Reference Guide – HDR TRIM9 Workflows – School Staff – TRIM9 Web Client

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

NB:

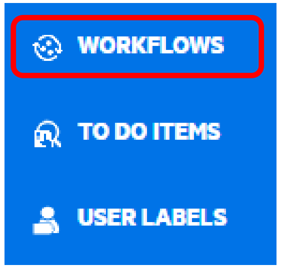
- You must be connected to the University Network either on-site or via VPN for you to gain access to the University of Newcastle TRIM9 Web Client
- Google Chrome is the recommended browser
- The URL to enter in your browser is: https://records.newcastle.edu.au
- Additional TRIM9 Web Client guides are available on the Records Governance Services website or by clicking here and selecting the **Web Client Guides** drop-down**.**

1. Access Current Activities

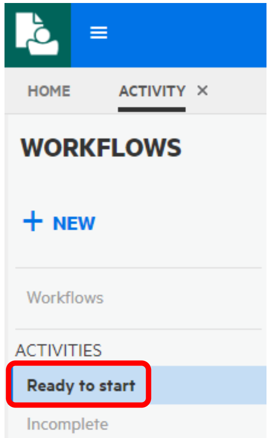
Current Activities are Activities assigned to you or your Position which are ready to start and have not yet been completed. You can locate your Current Activities by following the below instructions:

1. Click the **Menu** button at the top left of the TRIM9 Web Client screen:

2. Four columns of options will display. In the fourth column, click on **WORKFLOWS**:



3. Any Activities which are assigned to you or your Position which are ready to start will be displayed. When viewing your Current Activities, on the left of your screen always ensure that **Ready to start** is selected as shown below:

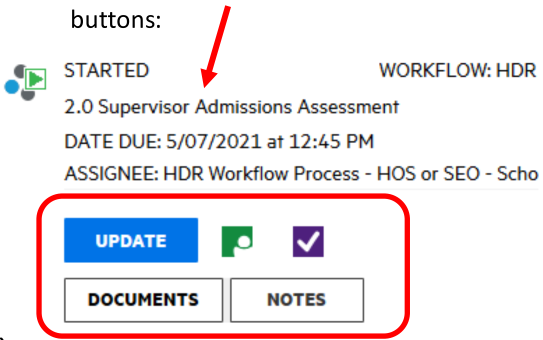


Note: If your School has two Workflow Positions (one for Admissions and one for Candidature Variations) and you belong to both, your Candidature Variation Activities won't be visible via this method. Instead, Records Governance Services or the Graduate Research Office will need to create a saved search for you which displays all your Current Activities and assist you with adding it into your Favorite Saved Searches Shortcut. Then, to access and run this saved search refer to Section 6 of this guide.

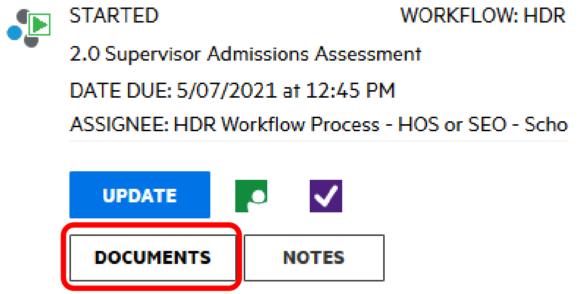
2. Show Records/Applications (HDR Admissions Process)

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

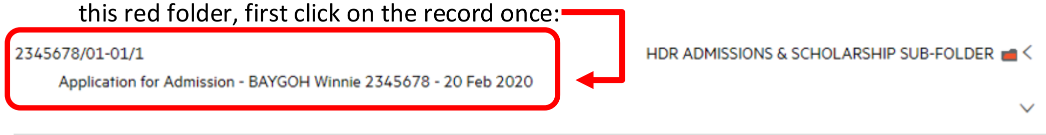
1. Click on the Activity once to display the UPDATE, DOCUMENTS, NOTES etc. buttons:



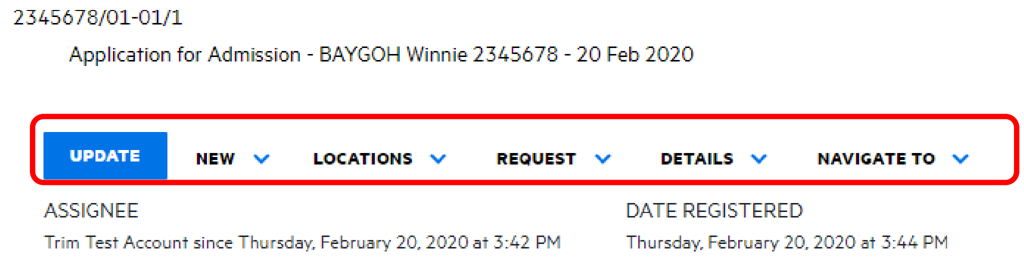
2. Click **DOCUMENTS**:



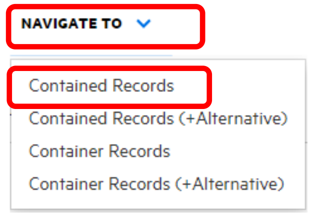
3. The red HDR Admissions & Scholarship Application for Admission folder should appear, similar to the below. To see the sub-folders contained within this red folder, first click on the record once:



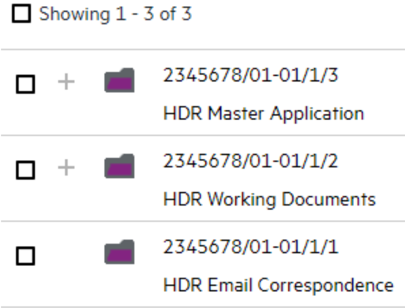
4. This will display the UPDATE, NEW, LOCATIONS etc. options:



5. Click the **NAVIGATE TO** drop-down and select **Contained Records**:

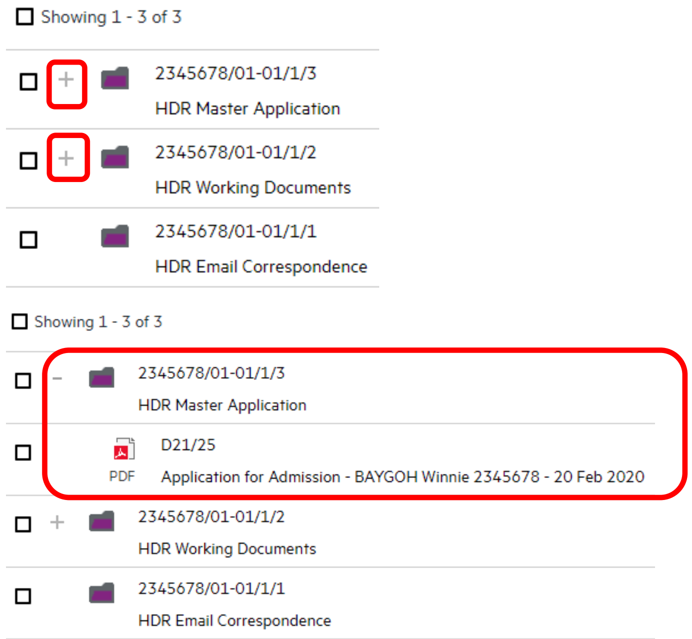


6. The purple sub-folders contained within the application will appear on screen:



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

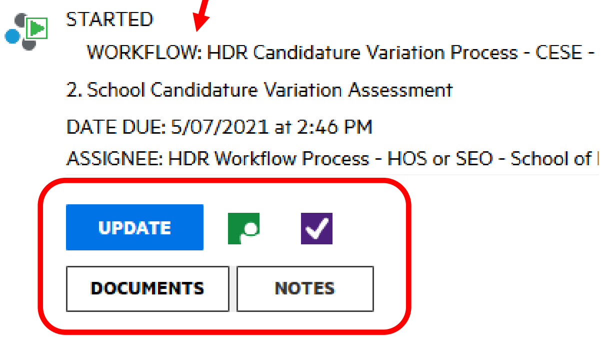
7. Click the **+** next to a sub-folder to see its contents:



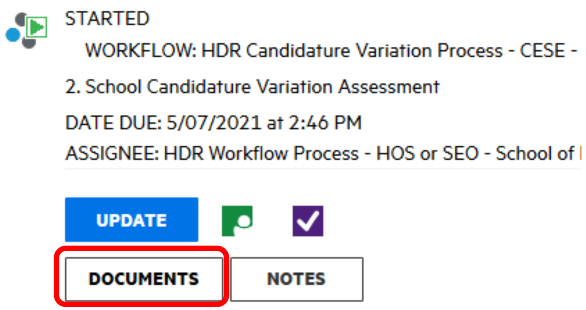
2. Show Records/Applications (HDR Candidature Variation Process)

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

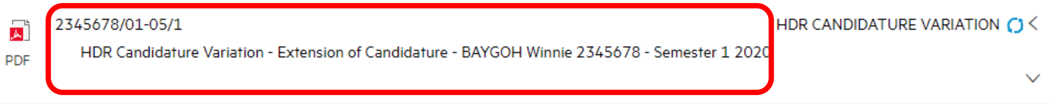
1. Click on the Activity once to display the UPDATE, DOCUMENTS, NOTES etc. buttons:



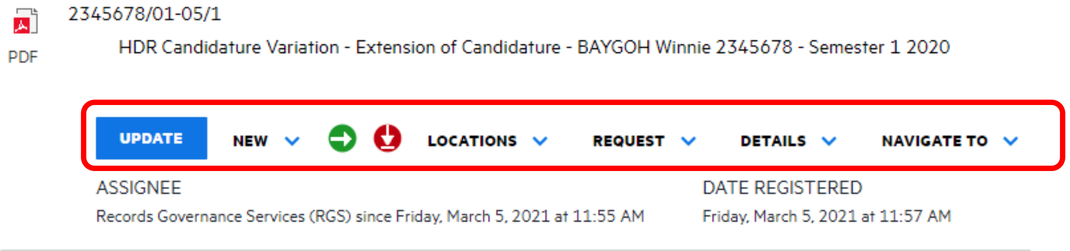
2. Click **DOCUMENTS**:



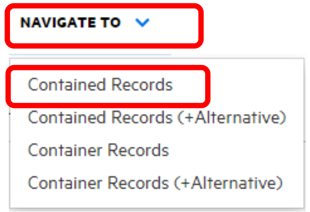
3. The Candidature Variation PDF and blue HDR Candidature Variation record will appear. The PDF is editable from here (refer Section 3 on the next page for instructions). However, if you need to view any of the supporting documentation contained within the sub-folders, first click on the record once:



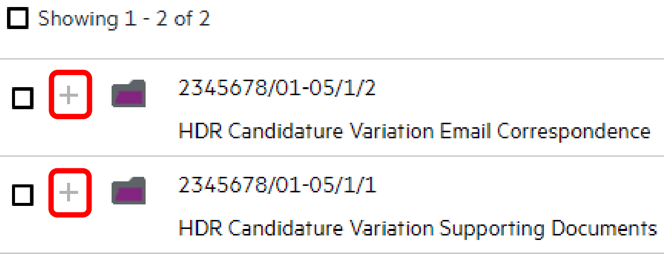
4. This will display the UPDATE, NEW, LOCATIONS etc. options:



5. Click the **NAVIGATE TO** drop-down and select **Contained Records**:



6. The purple sub-folders contained within the application will appear on screen. Click the **+** next to a sub-folder to see its contents:

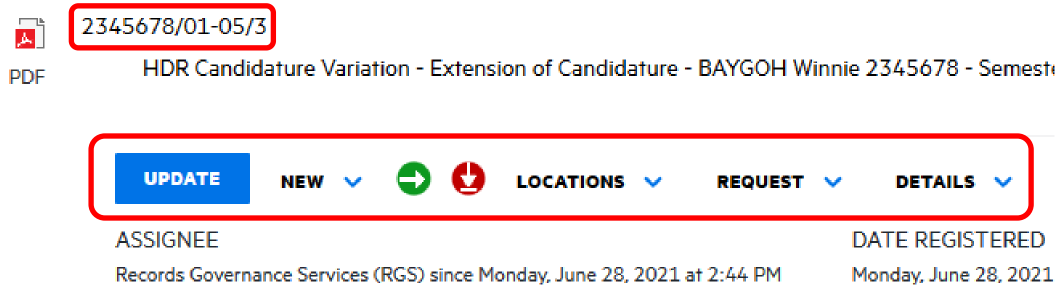


3. Edit a Document

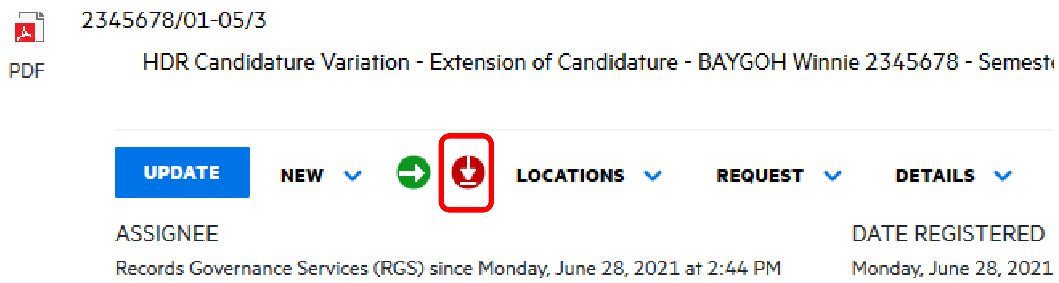
1. Locate the document which you want to edit/update. Section 2 contains instructions for locating both the Admissions/Scholarship PDF and Candidature Variation PDF (depending on which process you're current Workflow Activity pertains to).

   Note: the below instructions use a Word document as an example document, however when working with HDR Workflows in TRIM9, the document that you are editing will most likely be a PDF.

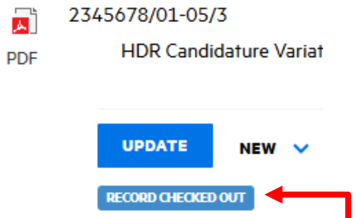
2. Ensure the options for the document such as UPDATE, NEW, LOCATIONS etc. are displayed. If not, click on the record number once to display them:



3. Click the **Check out** button:



4. The Edit Status of the document will change to Checked Out:

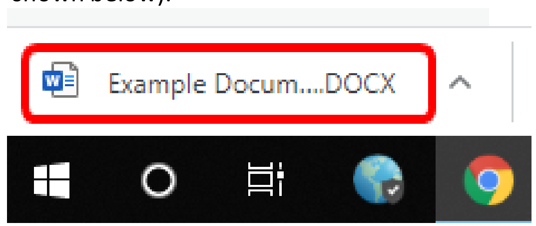


Note: The above **'RECORD CHECKED OUT'** pop up will display briefly to indicate that the record has been successfully checked out.

Hint: You can check at any time if a particular record is checked out by clicking on the **Hide/show the Properties Panel** button on the right of the TRIM9 Web Client screen, and checking the 'Edit Status' field to see if it states the record is 'Checked Out':

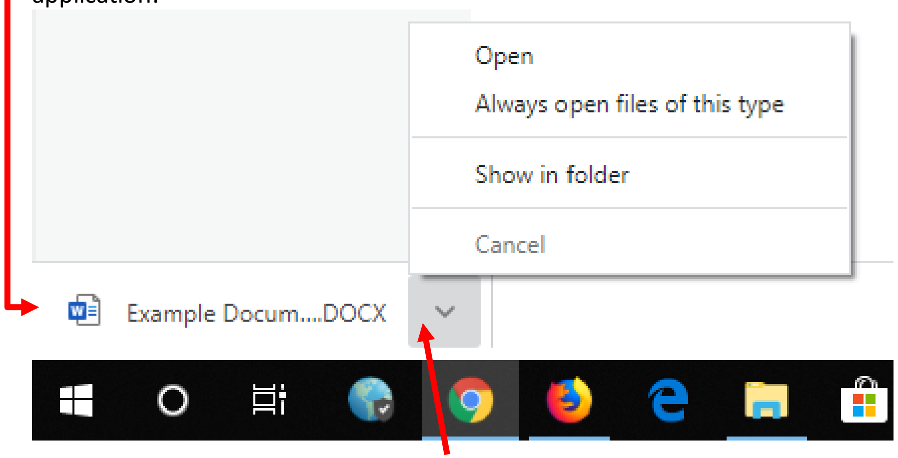
Edit Status:
Checked Out

5. The document will be downloaded to your local computer (where the document downloads to and how you access it may differ depending on the browser you are using and your download settings, however using Google Chrome (recommended) the document will download to your 'Downloads' folder on your computer and be available for you to open at the bottom left of your Google Chrome window as shown below):



Hint: Alternatively you will be able to access it in your 'Downloads' folder on either a PC or a Mac.

6. If using Google Chrome, if you click on the document itself at the bottom left of your Google Chrome window then the document will open in its authoring application:



Alternatively, if you click on the drop-down arrow as shown above you will be given three options:

Open : Will open the document in its authoring application,

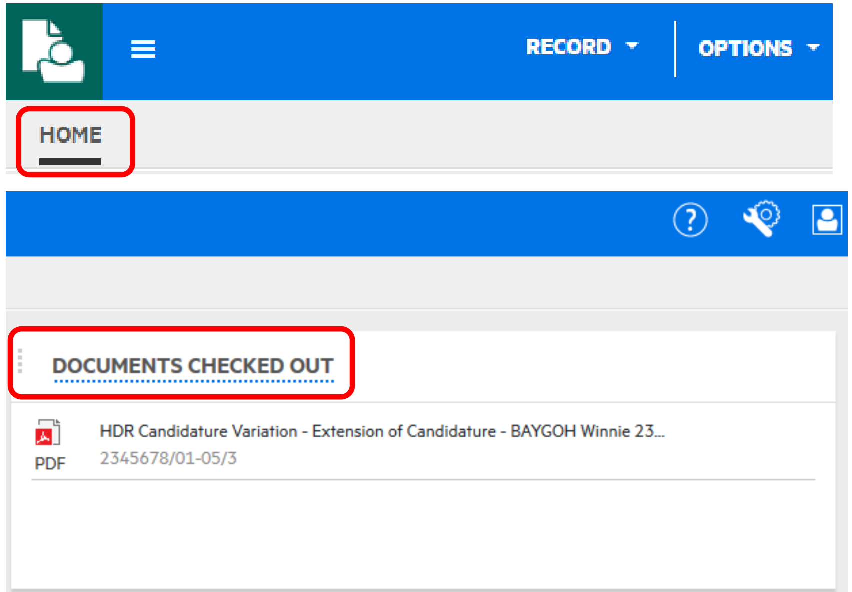
Always open files of this type : Changes your Google Chrome settings so that next time you download a file of this type it will automatically open,

Show in folder : Will open your 'Downloads' folder and highlight the recently downloaded document for you. From here you can open it, or perhaps drag and drop it to your desktop for easier future access.

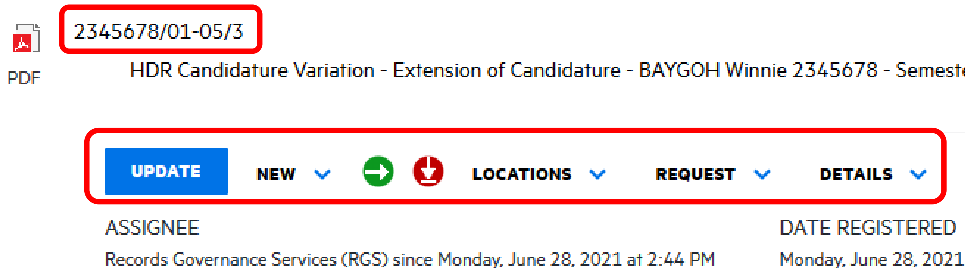
7. Edit the document as required. Once finished editing, save and then close the document.
Note: If business process or circumstance requires you to have the record checked out for some time, please be aware that while you have the record checked out, colleagues will be unable to edit the record themselves (paramount for version control) and will also be unable to view any changes you have made to the record since you checked it out.

8. When you are ready to save your updated document back into TRIM9, first locate the record in the TRIM9 Web Client.

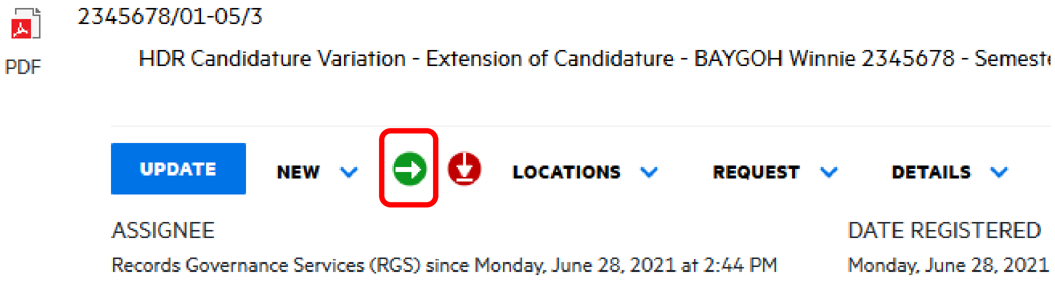
Hint: If it has been some time since you checked out the document, an easy way to locate it in the TRIM9 Web Client is to select the **HOME** button and look for it in your 'DOCUMENTS CHECKED OUT' dashboard item:



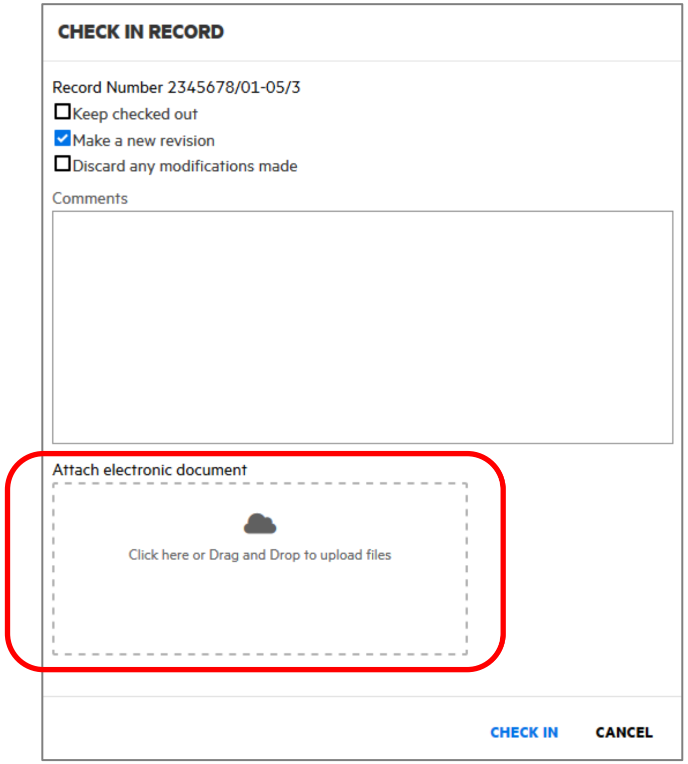
9. Once you have located it, ensure the options for the record such as UPDATE, NEW, LOCATIONS etc. are displayed. If not, click on the record number once to display them:



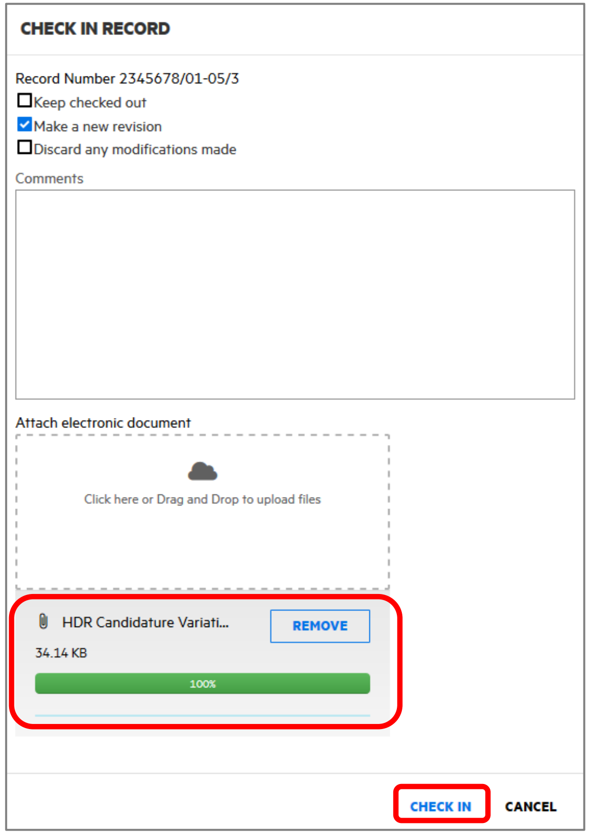
10. Click the **Check In** button:



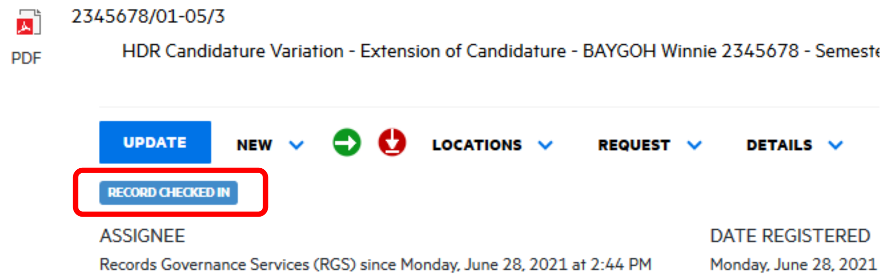
11. The **'CHECK IN RECORD'** window will appear. Under the **Attach electronic document** area either drag and drop your updated document into the space provided, or click in the space provided to open File Explorer (Windows PC) or Finder (Mac) in order to browse to and select your updated document:



12. In the **'CHECK IN RECORD'** window you will now notice that the updated document has now been uploaded. Select **CHECK IN**:

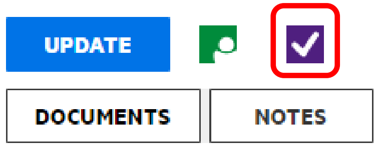


13. The below **'RECORD CHECKED IN'** pop up will display briefly to indicate that the record has been successfully checked in:



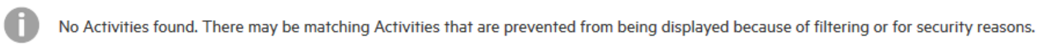
4. Complete Activities

1. Access your Current Activities as per the instructions in Section 1 above (**Menu** button → **WORKFLOWS**) and locate the application Activity you wish to complete.
2. Click on it once.
3. Click on **Complete**:

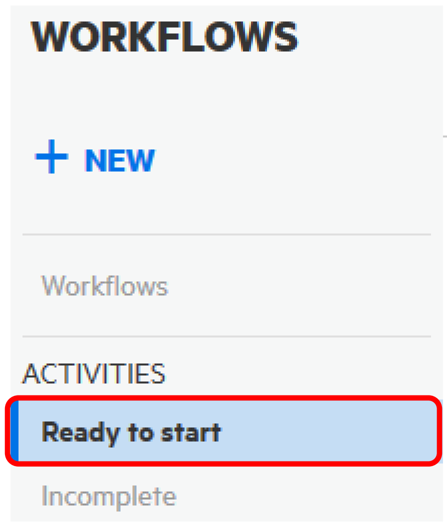


Once complete, the Activity will disappear from your Current Activities

***NB:** Once you complete an Activity, the below **'No Activities found'** message will display:*



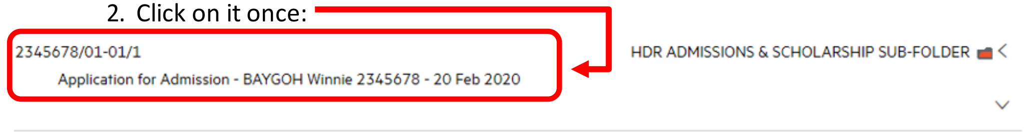
4. If you have (or you want to check if you have) other Activities to complete, click **Ready to start** on the left of your TRIM9 screen:



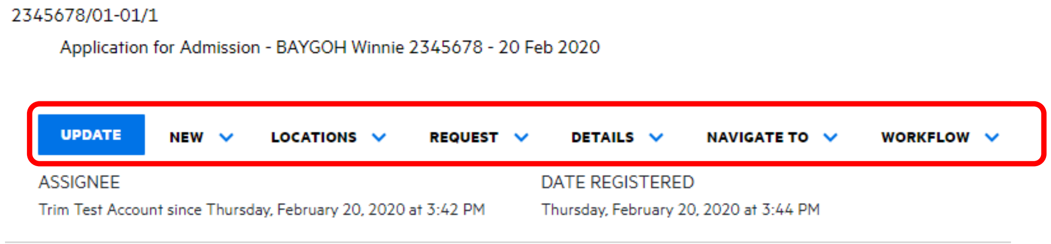
5. Navigation

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

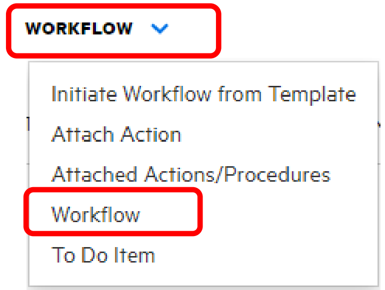
1. Navigate to the required red HDR Admissions & Scholarship Application for Admission folder or blue HDR Candidature Variation record.
2. Click on it once:



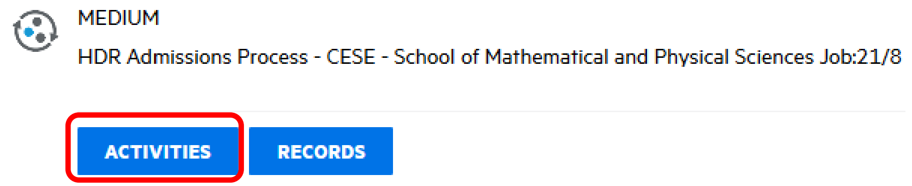
3. This will display the UPDATE, NEW, LOCATIONS etc. options:



4. Click the **WORKFLOW** drop-down and select **Workflow**:



5. The Workflow will display. Click on it once, then select **ACTIVITIES** to display all Activities for that Workflow:



6. Access Saved Searches

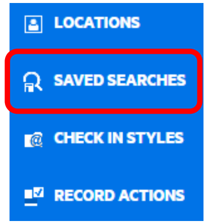
A number of saved searches have been configured to enable you to run reports and statistics.

Records Governance Services or the Graduate Research Office can assist you with adding any required saved searches into your **Favorite Saved Searches Shortcut** for quick and easy access.

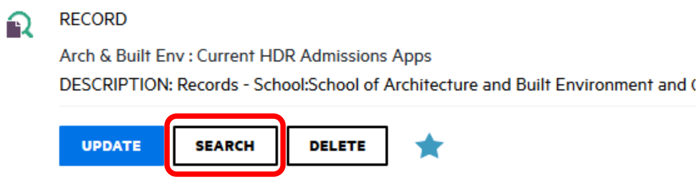
Once they have been set up, to access and run your favorite saved searches;

1. Click the **Menu** button at the top left of the TRIM9 Web Client screen:

2. Four columns of options will display. In the third column, click on **SAVED SEARCHES**:



3. Your saved searches will appear on screen. To run any of your Favorite Saved Searches; click on the saved search once and select **SEARCH**:



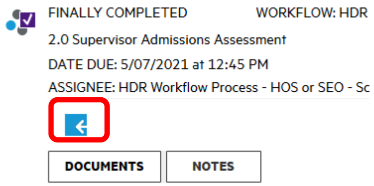
7. Rollback Workflow Activities

Rollback enables you to roll the Workflow back from the current Activity to any preceding Activity in the Workflow which has been completed prior. Unfortunately the Rollback function is not available in the TRIM9 Web Client, therefore if you require an Activity to be rolled back please contact your administration support or the Graduate Research Office.

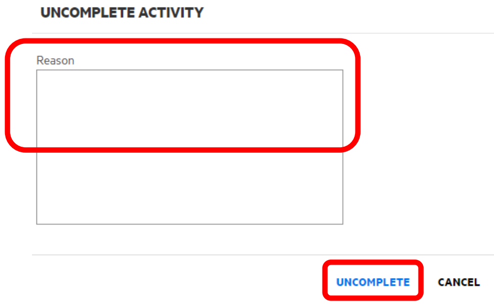
8. Uncomplete Activities

Should you accidentally complete an Activity, you can uncomplete it. You may need to follow the steps in Section 5 above to locate the Activity you want to uncomplete. To uncomplete an Activity:

1. Click on the Activity once to display the Uncomplete, DOCUMENTS and NOTES buttons, then click the **Uncomplete** button:



2. Type the reason you need to uncomplete the Activity, then click **UNCOMPLETE**:

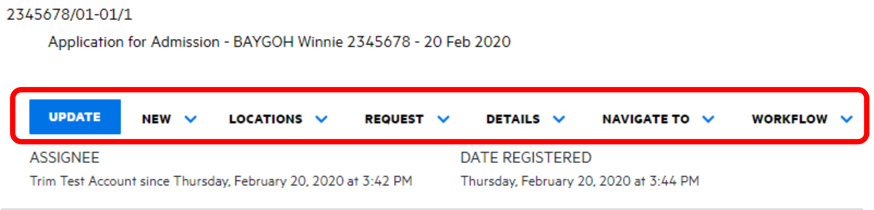


9. Add Notes

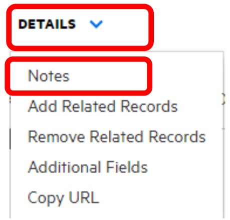
Adding a Note allows you to share key information on an applicant's file with other TRIM9 users. It is recommended that Notes are placed on the red HDR Admissions & Scholarship Application for Admission folder or blue HDR Candidature Variation record (depending which process you're currently working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

1. Locate the red HDR Admissions & Scholarship Application for Admission folder or blue HDR Candidature Variation record (refer instructions in Section 2. 'Show Records/Applications' – Steps 1 and 2):
2. Click on it once:

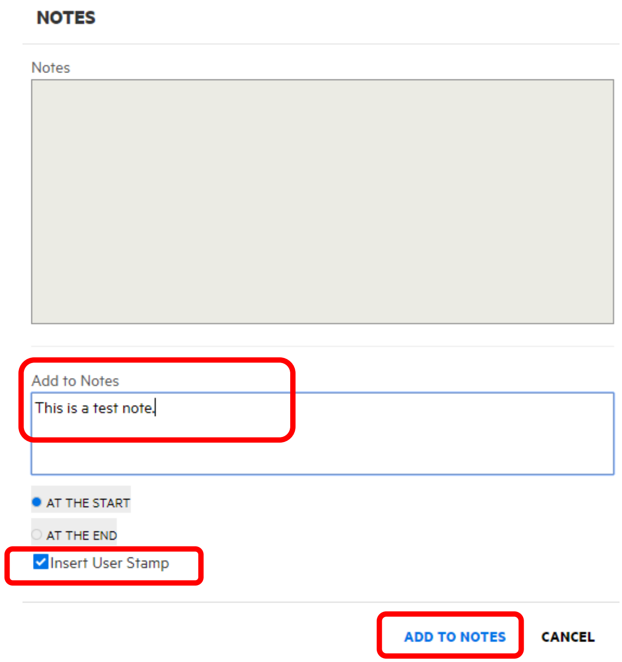
3. This will display the UPDATE, NEW, LOCATIONS etc. options:



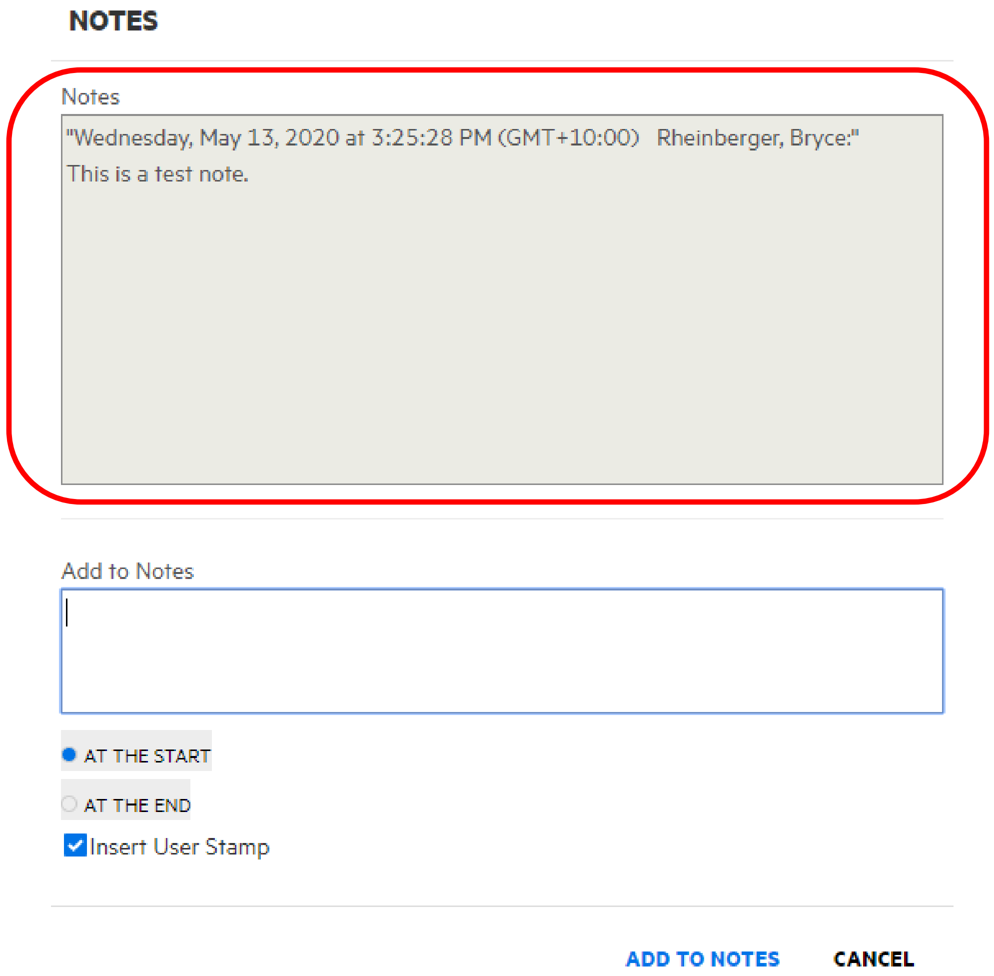
4. Click the **DETAILS** drop-down and select **Notes**:



5. The **'NOTES'** window will display. In the 'Add to Notes' field type in your Note. Next, ensure the 'Insert User Stamp' field is ticked, then select **ADD TO NOTES**:



6. To review any current Notes on a red HDR Admissions & Scholarship Application for Admission folder or blue HDR Candidature Variation record, click on the folder/record once, then click on the **DETAILS** drop-down and select **Notes**. Any existing Notes will display in the top part of the 'NOTES' window:



7. Click **CANCEL** if you don't need to add a Note:

10. Reassign 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 reassign it to yourself first in order to be able to complete it. 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 **Reassign** the Activity to yourself before you can complete 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 reassign an Activity:

1. Click on the Activity to display the UPDATE, DOCUMENTS, RESULTS etc. options.

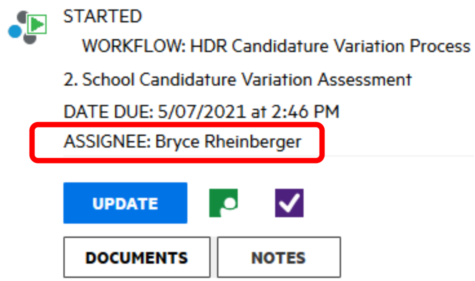
2. Click on the **Reassign** button:

3. The **'REASSIGN ACTIVITY'** window will appear. Delete the current Assignee from the 'Set Assignee' field then type your name (or a colleagues name if you happen to need to reassign the Activity to someone else) into this field, then select the TRIM9 Location when it appears below:

NB: *When reassigning, ensure you select a green Location.*

4. Click **SAVE**:

5. The 'Assignee' field will be updated accordingly:



NB: *If you happen to reassign an Activity to yourself then become aware that you will not be available to complete the Activity (I.e. on leave), you should reassign it back to the original Group Position Assignee so it will correctly display in the appropriate team members* ***Current Activities****. If you do need to reassign an Activity back to the original Group Position Assignee, when you get to step 3 (refer left) it will help to know that the title of all Workflow Positions begins with 'HDR Workflow Process'.*