Quick Reference Guide - Using Action Tracking in the TRIM9 Web Client

Purpose

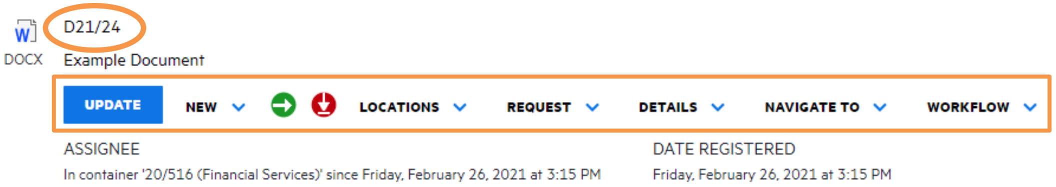
This document is designed to assist staff with using the Action Tracking function of TRIM9 when using the TRIM9 Web Client.

Hint: See Appendix A at the end of this guide for a list of available Actions and their purpose, plus information on Action Tracking icons and status indicators.

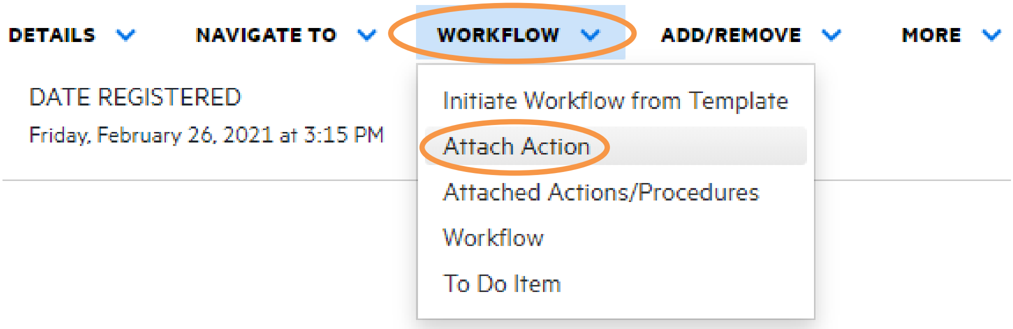
Adding an Action to a Record

1. Locate the record which you want to add an Action to.

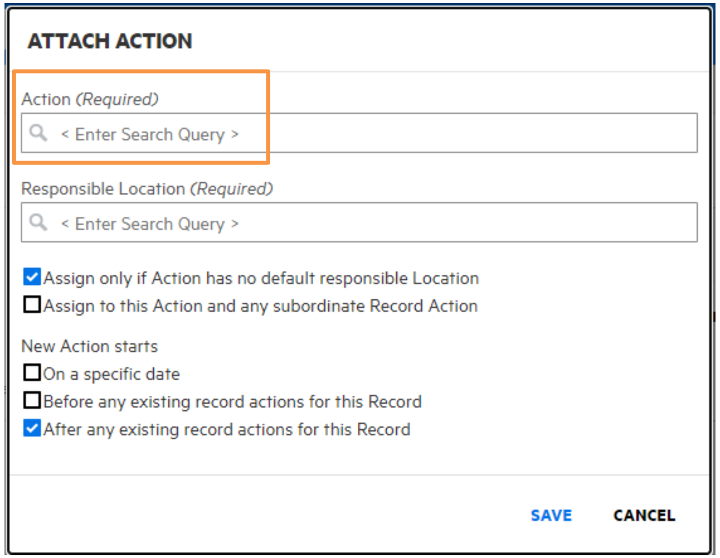
2. Ensure the options for the record such as UPDATE, NEW, LOCATIONS etc. are displayed. If not, click on the record number once to display them:



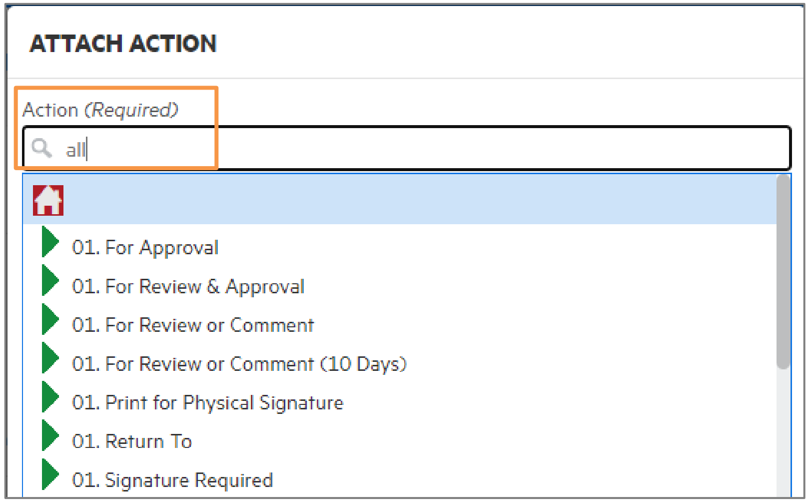
3. Click on the **WORKFLOW** drop-down and select **Attach Action**:



4. The **'ATTACH ACTION'** window will display. If you know the exact name of the Action you would like to add to the record, start typing it in the 'Action' field and it will display for you to click on and select:

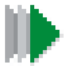


However, if you don't know the exact name of the Action you would like to add to the record, type **all** in the 'Action' field and all available Actions will display in alphabetical order. Scroll through the available Actions to find the Action you want to add to the record, then click on it once to select it:



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



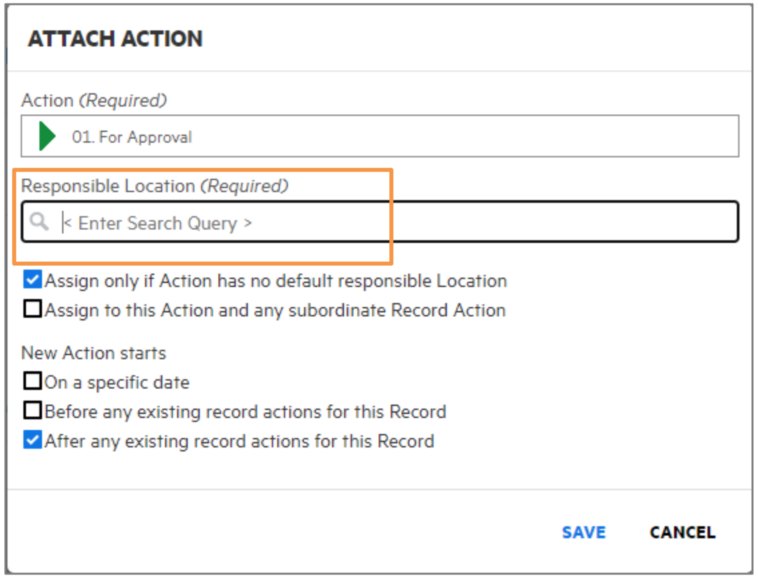
Action is a linear process/procedure which has multiple ‘Action Steps’

5. 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 added to the record.

   Note: In the Web Client, Actions must be assigned to a Person for them to display in that user’s Records Due Tray. Whereas in the Full Client, Actions assigned to a Position, Unit/Team or Group will also display in a user’s Records Due Tray.

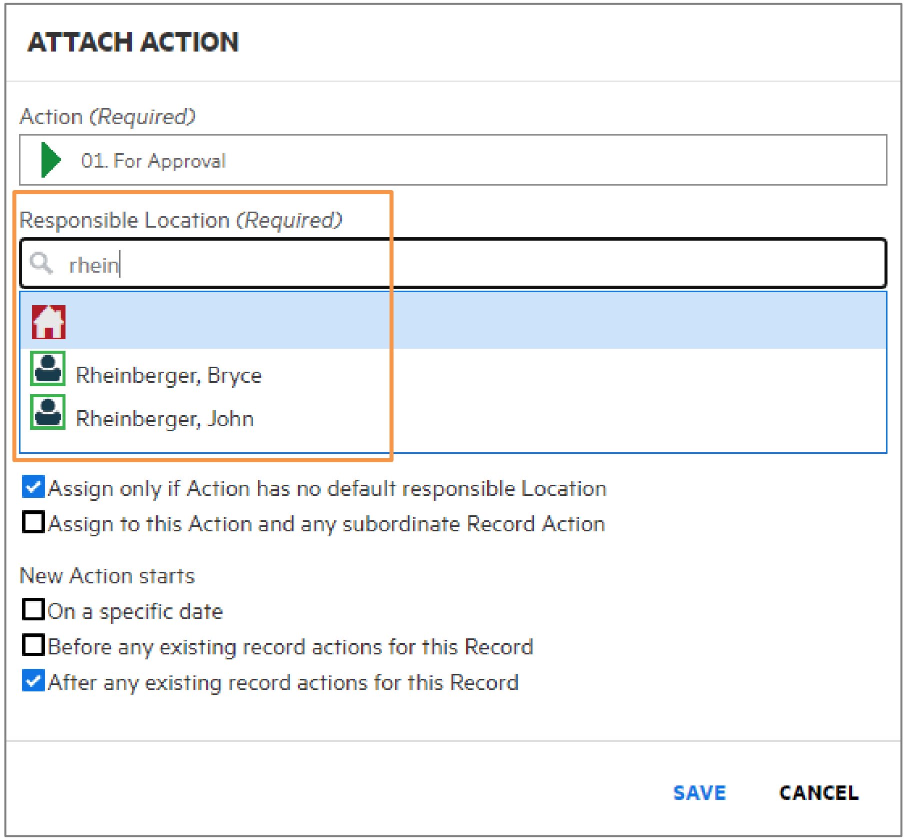
   If the ‘Responsible Location’ field is populated as required, you may move forward to [Step 6.]

   If you need to populate/update the ‘Responsible Location’ field, start typing the surname of the person you wish to add as the Responsible Location:

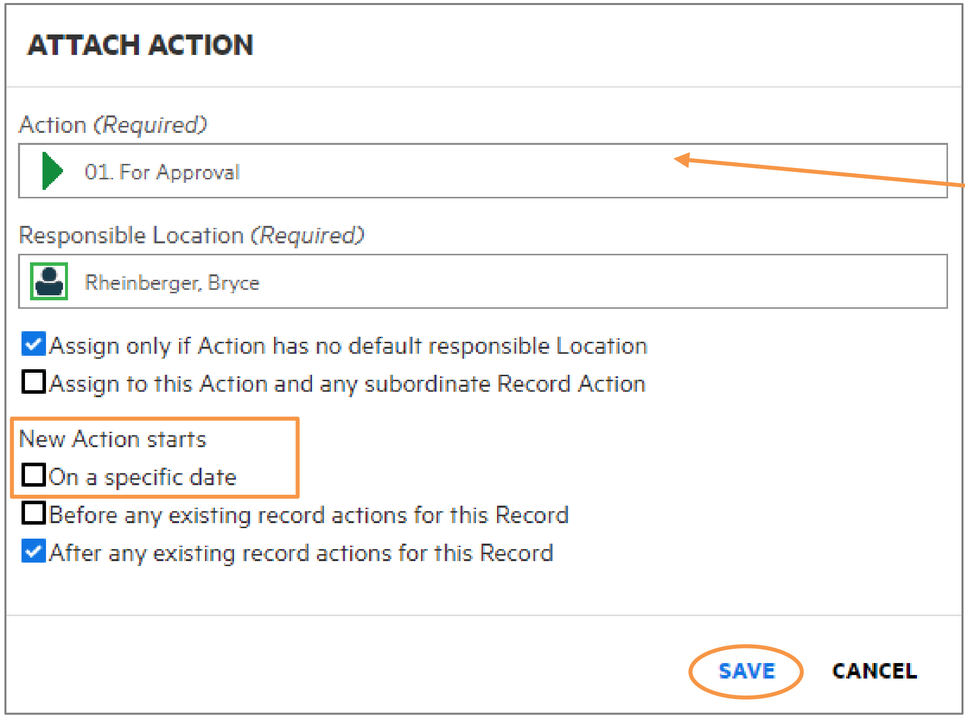


A list of matching Locations will appear. Click on the required Person to select them:

Hint: Only select Locations represented by a green icon.

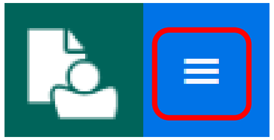


6. If you would like the Action to start on a specific future date, you can tick the **'On a specific date'** checkbox and set the required specific date accordingly. Otherwise, click **SAVE** to add the Action to the record:

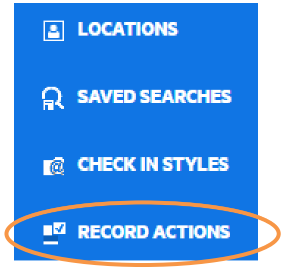


Locating Record Actions that require your Action (Records Due Tray)

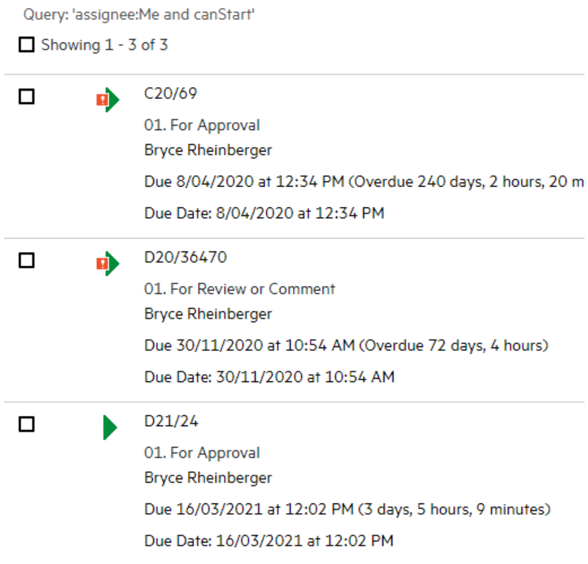
1. Click the **Menu** button at the top left of the TRIM9 Web Client screen:



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



3. Actions which are ready to start and are assigned to you or a position you belong to will be displayed:

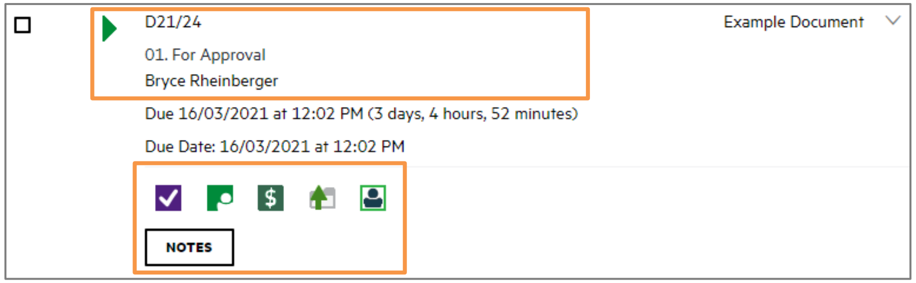


Locating the Record that an Action Pertains to

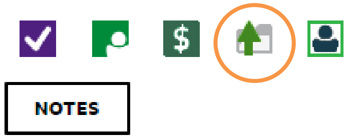
Most Actions will require you to review, approve and/or edit a document

To locate the record/document that an Action pertains to:

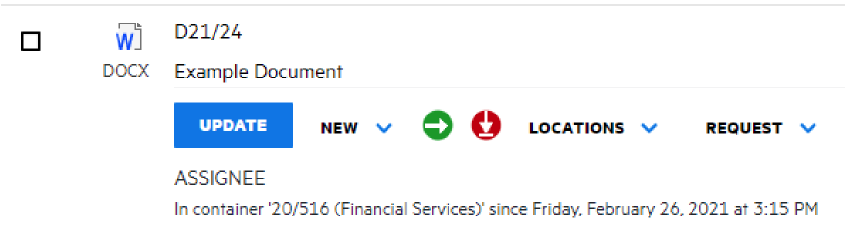
1. Click on an Action, and a number of icons/buttons will display underneath it:



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



3. The record will display:



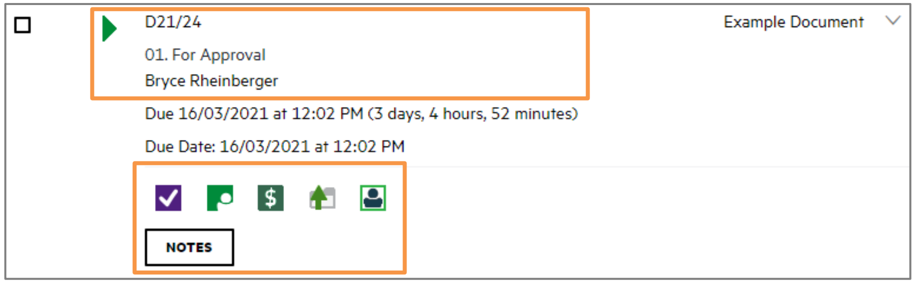
For guidance on viewing documents refer to the *TRIM9 - Quick Reference Guide - D20/145487 Viewing and Downloading Documents in the TRIM9 Web Client*

For guidance on editing documents refer to the *TRIM9 - Quick Reference Guide - D20/145387 Editing Documents in the TRIM9 Web Client*

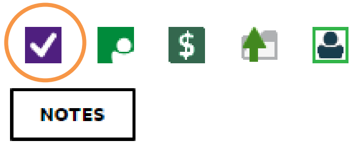
Completing an Action

Once you have reviewed, approved and/or edited the document that required Action, you will need to complete the current Action:

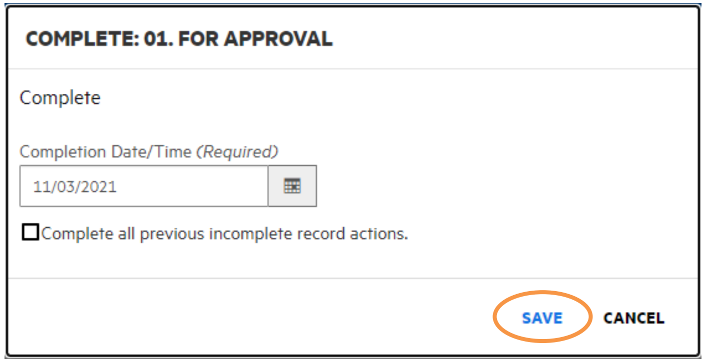
1. Click on an Action, and a number of icons/buttons will display underneath it:



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



3. The **'COMPLETE'** window will appear. Click **SAVE**:

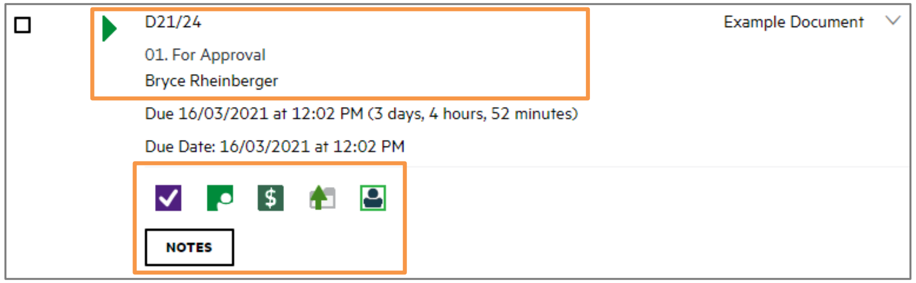


4. The Action is now completed. The Complete button will disappear, and be replaced by an Uncomplete button:

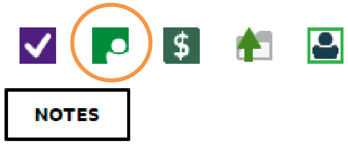
Reassigning an Action

Should you need to reassign an Action so that the responsibility for completing the Action resides with an alternative Person (e.g. if an Action is assigned to you and you are going on leave), please see below instructions on how to do so:

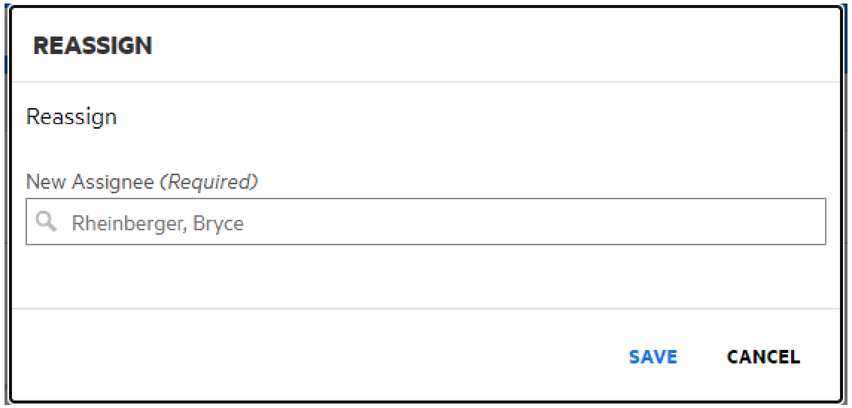
1. Click on an Action, and a number of icons/buttons will display underneath it:



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

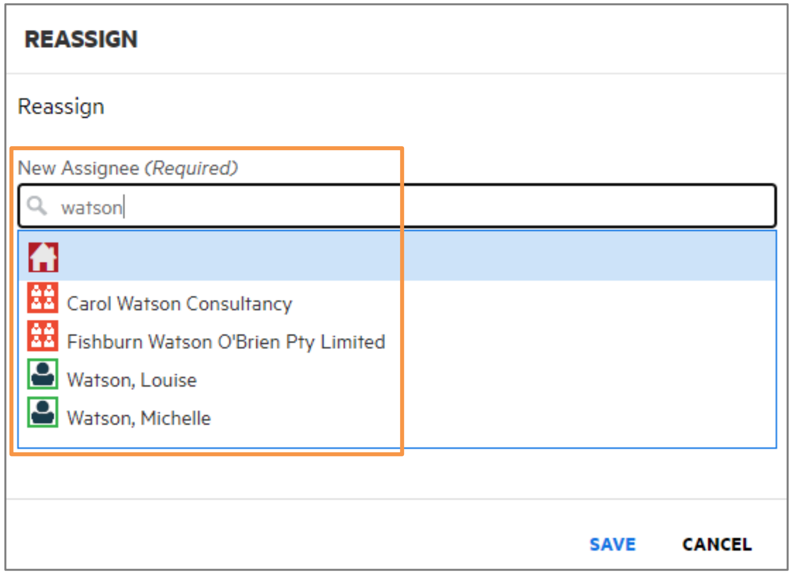


3. The **'REASSIGN'** window will appear:



4. In the 'New Assignee' field, start typing the surname of the person you wish reassign the Action to. A list of matching Locations will appear. Click on the required Person to select them:

   Hint: Only select Locations represented by a green icon.



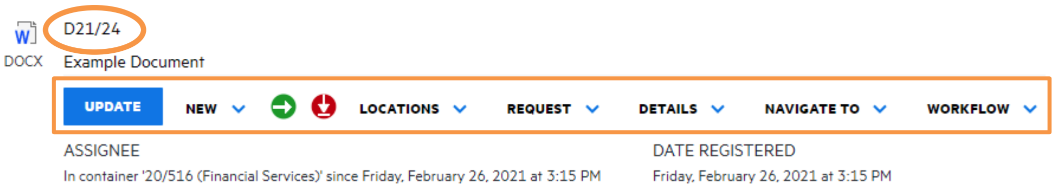
5. Click **SAVE** to finish reassigning the Action:

Inserting an Action

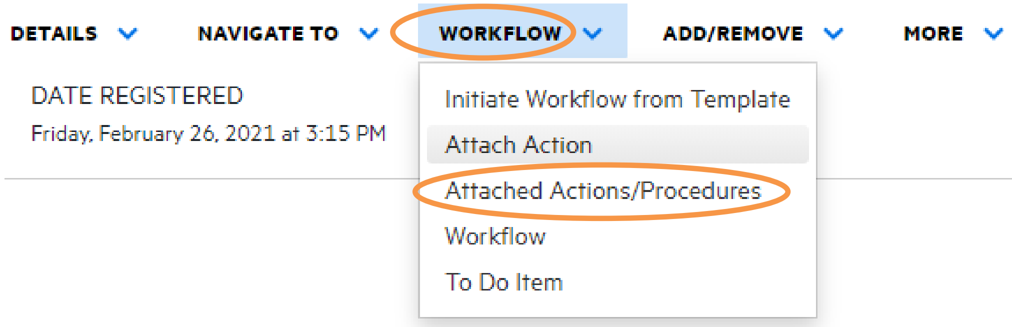
Should you need to insert/add an Action in a specific spot, to a record that already has Actions assigned to it (e.g. if you receive a 'For Approval' Action and you want to add a 'For Review or Comment' Action before you complete the 'For Approval' Action.

To insert an Action:

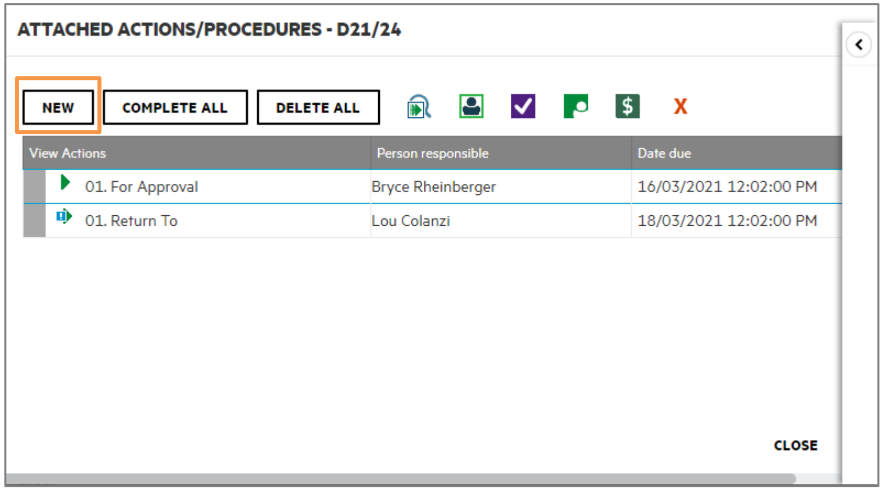
1. First, locate the record in TRIM9 which has the Action(s) for which you want to insert an additional Action.
2. Ensure the options for the record such as UPDATE, NEW, LOCATIONS etc. are displayed. If not, click on the record number once to display them:



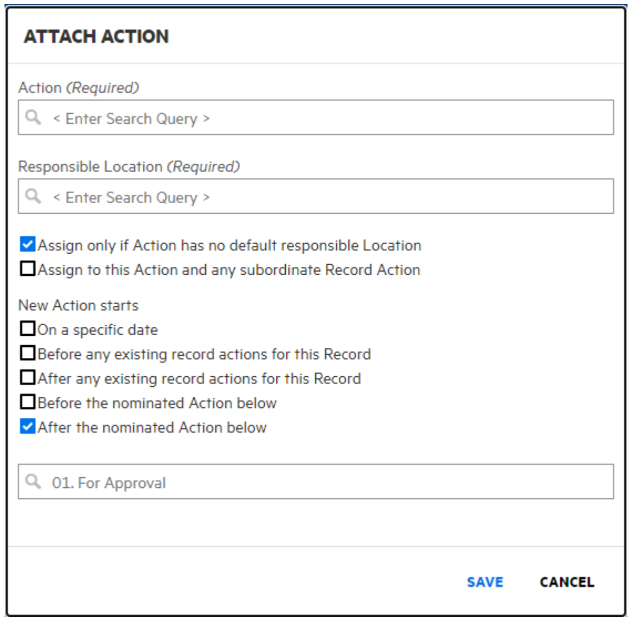
3. Click on the **WORKFLOW** drop-down and select **Attached Actions/Procedures**:



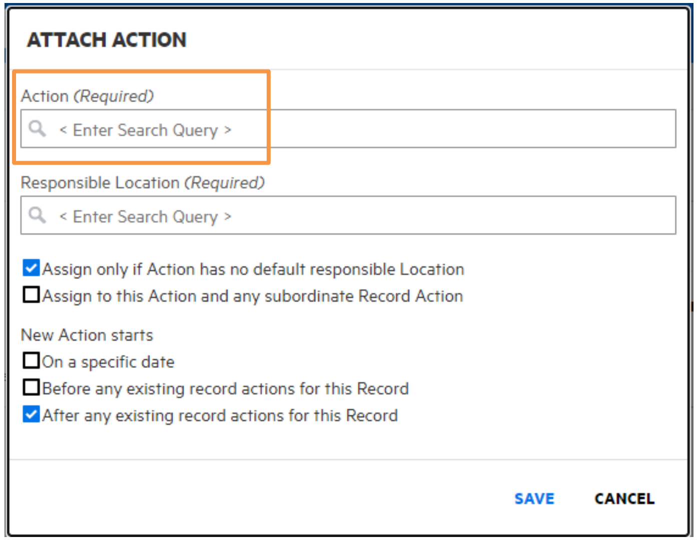
4. The **'ATTACHED ACTIONS/PROCEDURES'** window will appear. Click on the Action for which you want to insert a new Action before or after, then click **NEW**:



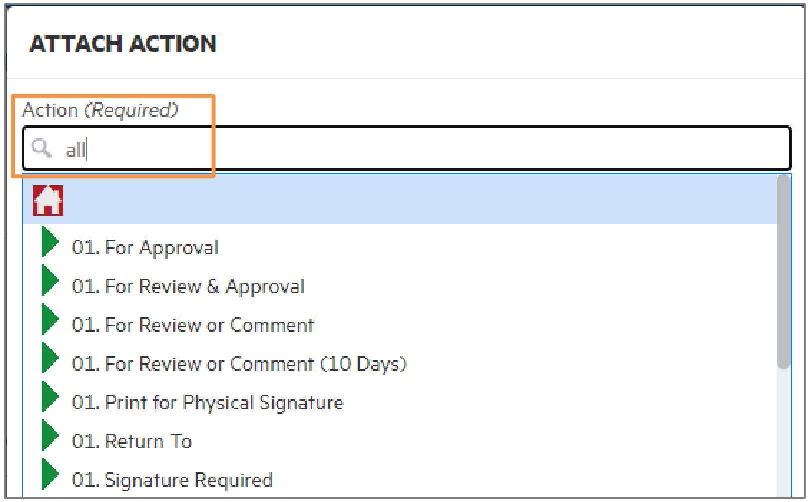
5. The **'ATTACH ACTION'** window will appear:



6. If you know the exact name of the Action you would like to insert, start typing it in the 'Action' field and it will display for you to click on and select:



However, if you don't know the exact name of the Action you would like to insert, type **all** in the 'Action' field and all available Actions will display in alphabetical order. Scroll through the available Actions to find the Action you want to add to the record, then click on it once to select it:



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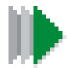
 Action is a single step/action

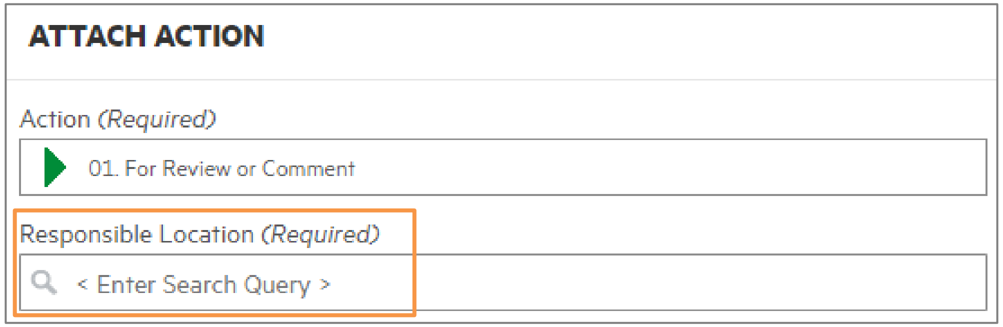
 Action is a linear process/procedure which has multiple 'Action Steps'

7. 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 added to the record.

   Note: In the Web Client, Actions must be assigned to a Person for them to display in that user's Records Due Tray. Whereas in the Full Client, Actions assigned to a Position, Unit/Team or Group will also display in a user's Records Due Tray.

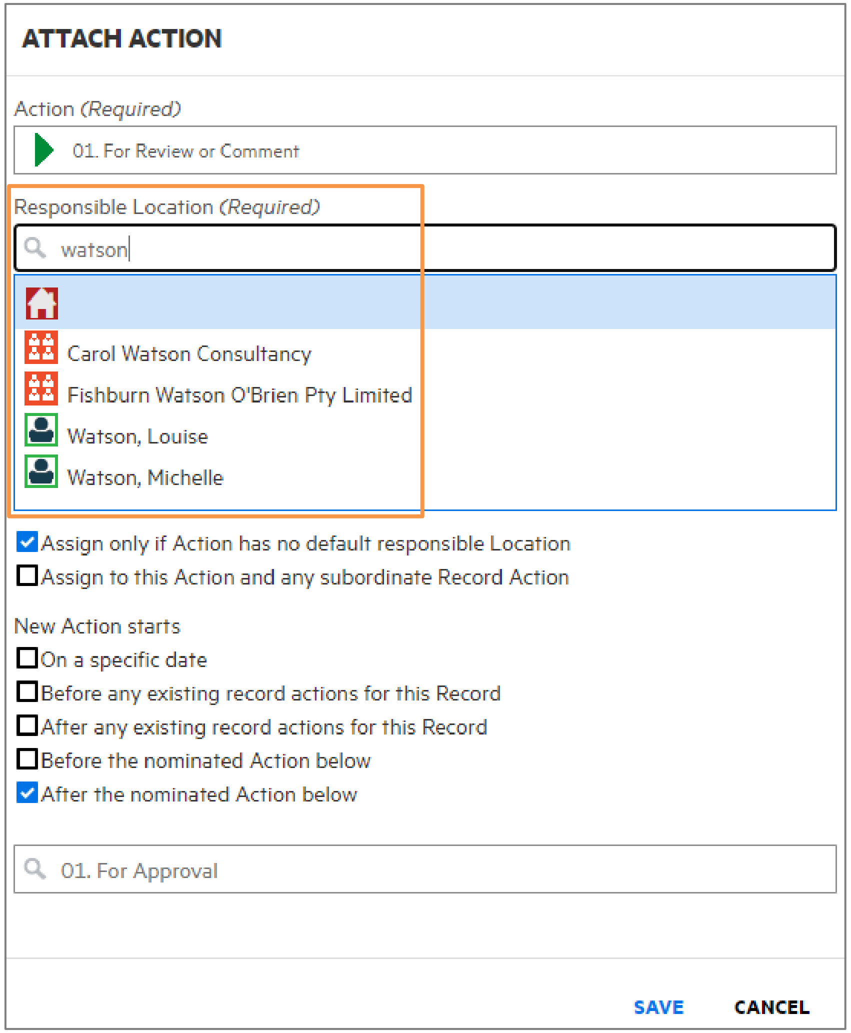
   If the 'Responsible Location' field is populated as required, you may move forward to Step 8.

   If you need to populate/update the 'Responsible Location' field, start typing the surname of the person you wish to add as the Responsible Location:

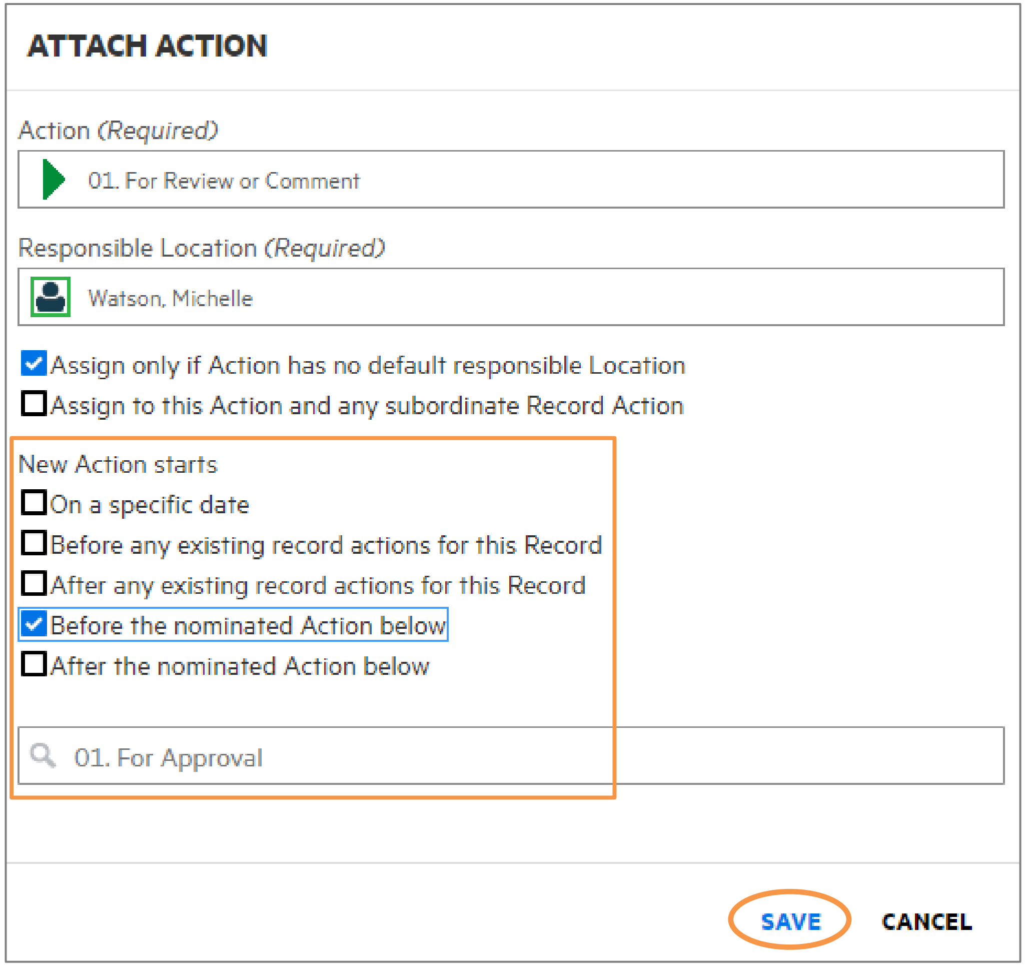


A list of matching Locations will appear. Click on the required Person to select them:

Hint: Only select Locations represented by a green icon.



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

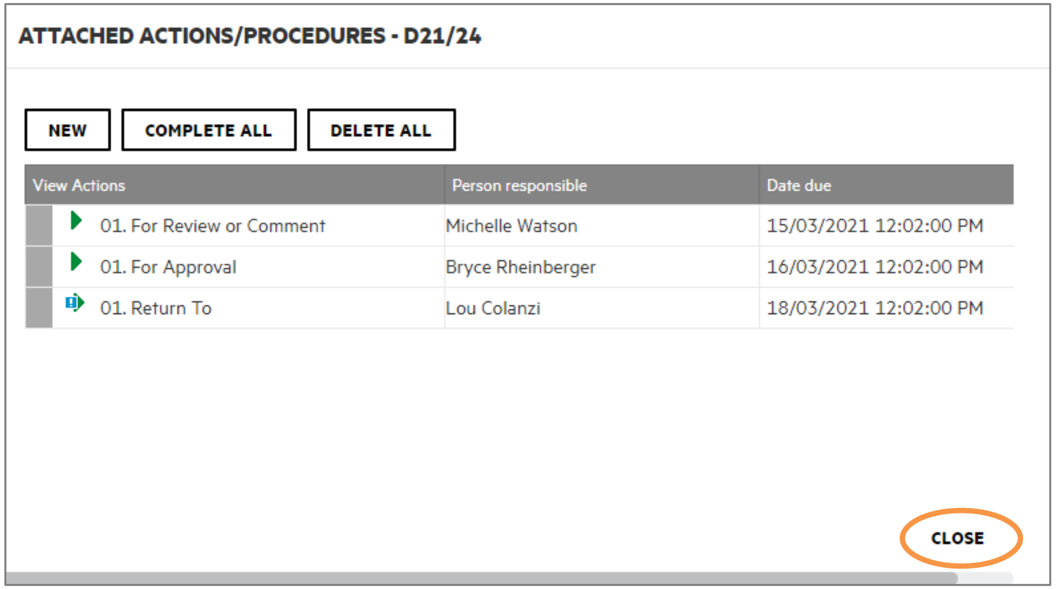


Hint: If you are selecting either 'Before the nominated Action below' or 'After the nominated Action below; the 'nominated Action' (as indicated by the arrow) will be the one you clicked on in Step 4.

9. 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 **CLOSE** to close the **'ATTACHED ACTIONS/PROCEDURES'** window:



Appendix A

Available Actions for General Use

Action	Purpose
For Review or Comment 3 Days	**Use:** This Action is designed to be used where review or comment is required. This Action can be used in isolation or in conjunction with the 'For Approval' and 'Print for Physical Signature' Actions. **Actions:** • Review the document/s • Provide comments • Complete the Action in TRIM9 **Note:** Can also be used in conjunction with 'Return To'
For Approval 4 Days	**Use:** This Action is designed to be used where approval is required. This Action can be used in isolation or in conjunction with the 'For Review or Comment' and 'Print for Physical Signature' Actions. It can also be added multiple times for various levels of approval. **Actions:** • Review the document/s • If **Approved** – Complete the Action in TRIM9 • If **Not Approved** – Seek additional information from the originator **Note:** Can be used in conjunction with 'Return To'
Print for Physical Signature 4 Days	**Use:** This Action is designed for use when a physical signature is required. Before using this Action, consider if the 'For Approval' Action can be used to obtain approval via a digital signature or email approval. **Actions:** • Print the document/s • Sign • Scan the document/s at a minimum 300dpi and place over the original document in TRIM9 • Complete the Action in TRIM9 **Note:** Can also be used in conjunction with 'Return To'
Return To 2 Days	**Use:** This Action is designed to be used when you want to be notified that an Action / Approval has been completed. Add this after the last Action and make the Responsible Location either yourself or the person you want to be notified when the Action sequence has been completed. **Actions:** • Add this Action at any point in the process where notification is required • Complete the Action in TRIM9

Action Tracking Icons and Status Indicators

Action Tracking icons change according to their status:

- Current Actions and Procedures display green arrows
- Completed Actions and Procedures show a tick in a purple box on a green arrow
- Actions and Procedures that are due next show one exclamation mark in a blue box on a green arrow
- Actions and Procedures that are overdue show one exclamation mark in a red box on a green arrow

	Current Procedure
	Next Procedure
	Overdue Procedure
	Completed Procedure
	Current Action Step
	Next Action Step
	Overdue Action Step
	Completed Action Step