

## Purpose

This document is designed to assist staff with the function of adding Action Tracking Activities in TRIM – **See Appendix A** for a list of available actions, their purpose and Action Tracking icons and status indicators.

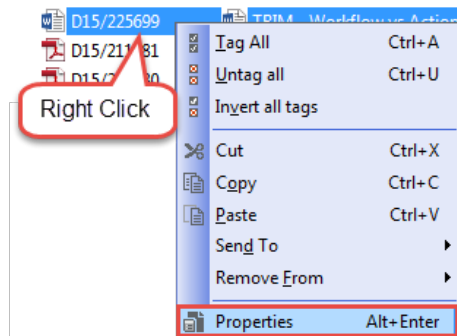
For instructions on how to insert an action into an existing process refer to the **Insert an Action** Quick Reference Guide

## Adding an Action

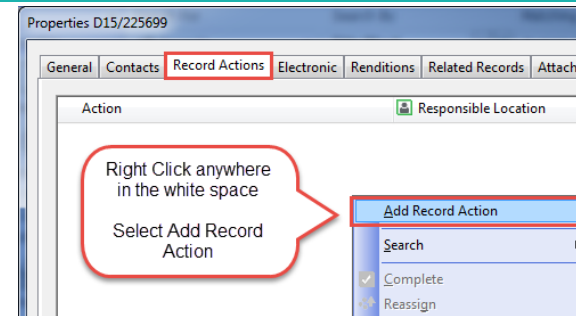
- Locate the document in TRIM that requires review, comments, approval etc.

**Note!** See Appendix A for a list of available actions and their purpose

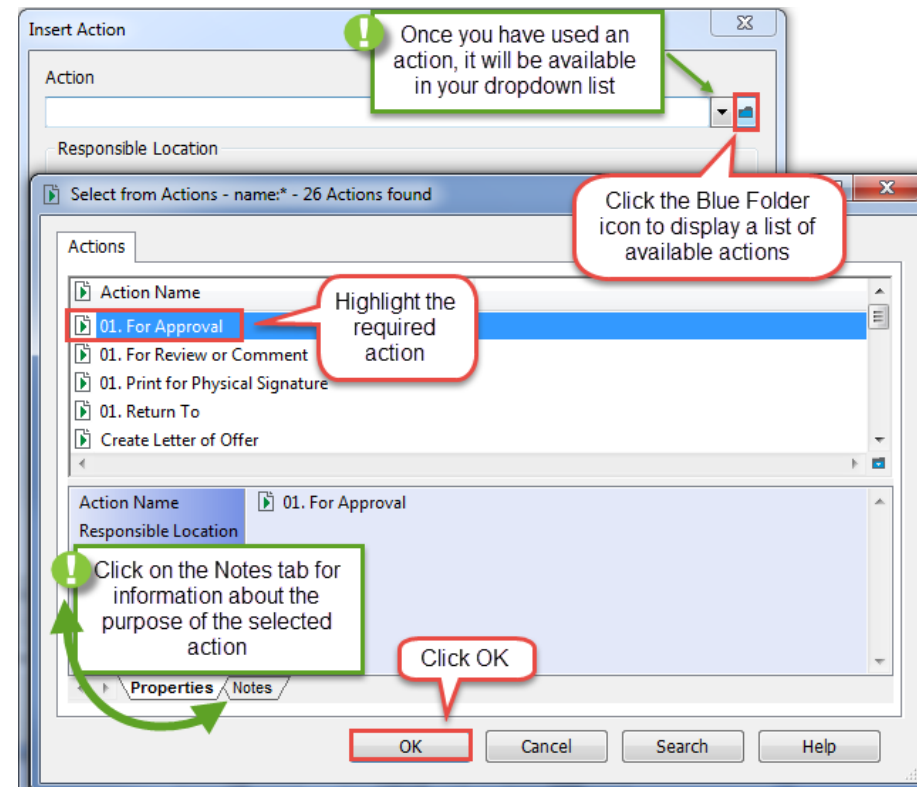
- Right Click > Properties



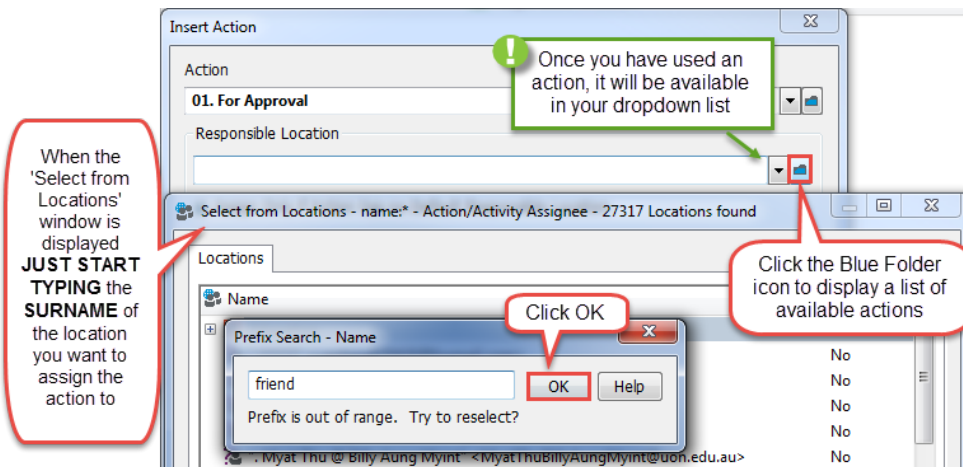
- Click the Record Action Tab
- Right Click anywhere in the white space
- Select Add Record Action




- Click the Blue Folder icon to display a list of available actions
- Highlight the required action
- Click OK



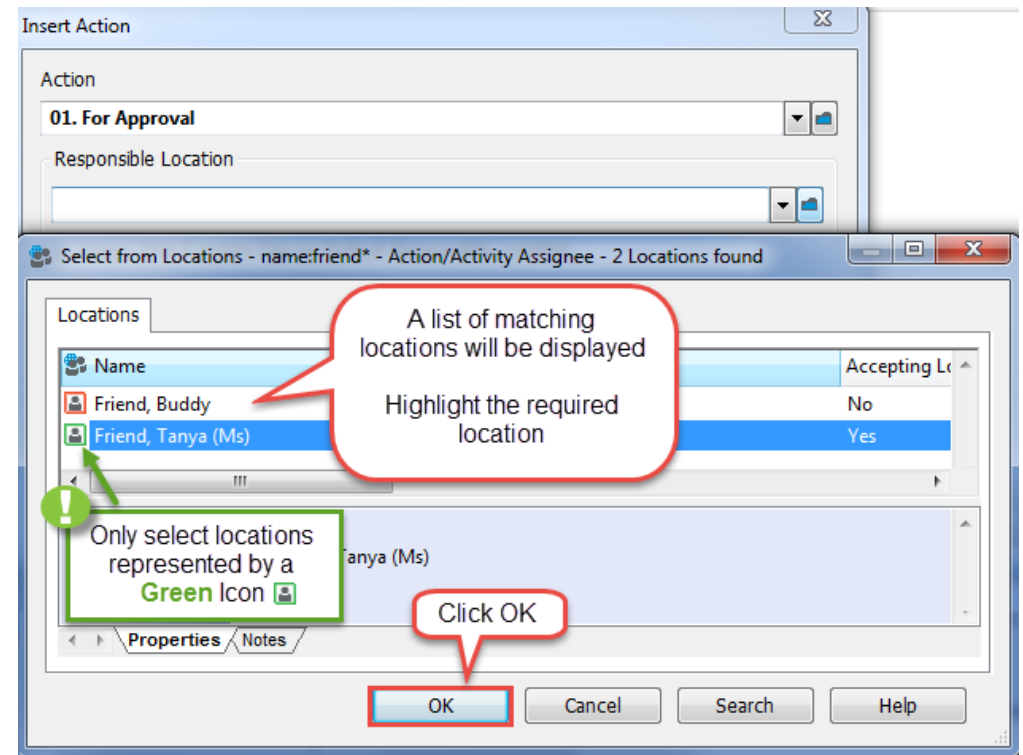
- Click the blue folder icon to display a list of Locations
- When the 'Select from Locations' window is displayed **JUST START TYPING** the **SURNAME** of the location you want to assign the action to
- Click OK



- A list of matching locations will be displayed
- Highlight the required location - Only select locations represented by a **GREEN** icon 

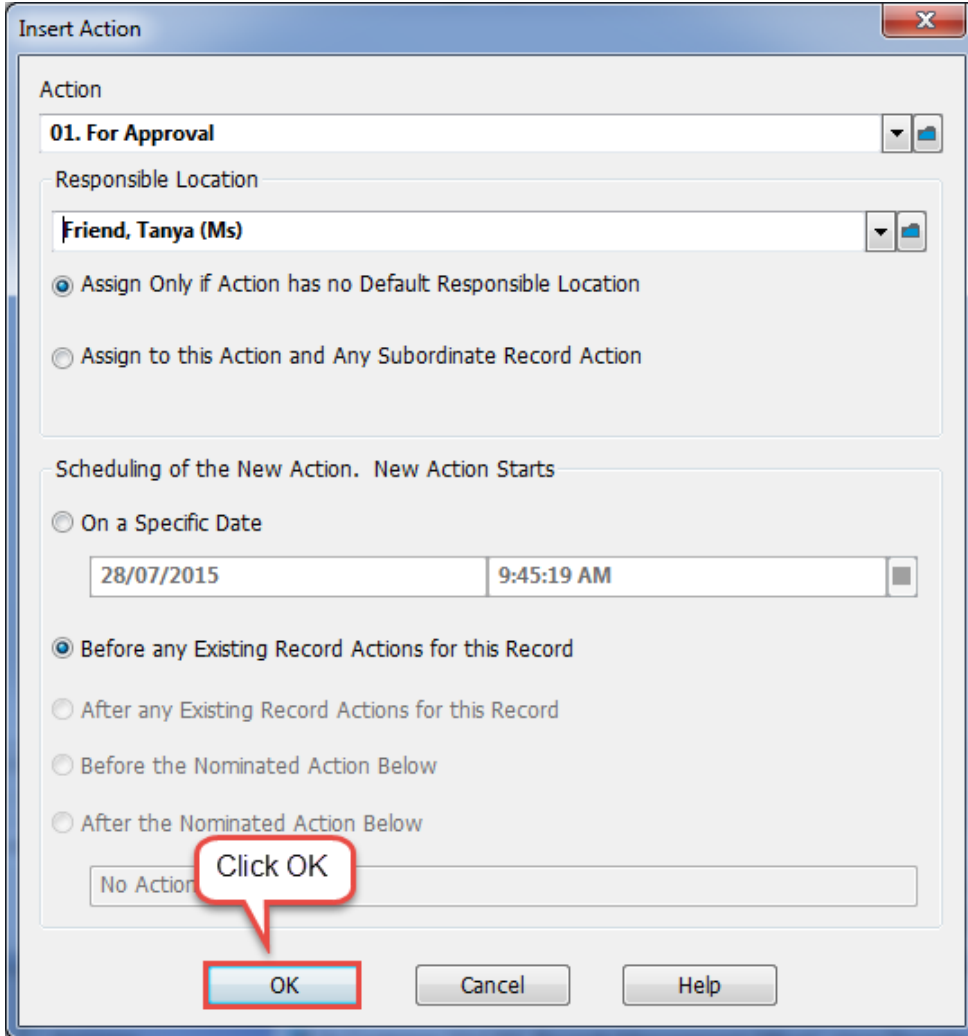
**Note!** Actions should only ever be assigned to a person location to ensure that the email notifications are received unless pre-arranged with the Records Management Office

- Click OK



**Note!** All other defaults remain the same if this is the first action assigned

- Click OK



**Insert Action**

Action  
01. For Approval

Responsible Location  
Friend, Tanya (Ms)

Assign Only if Action has no Default Responsible Location  
 Assign to this Action and Any Subordinate Record Action

Scheduling of the New Action. New Action Starts

On a Specific Date  
28/07/2015 9:45:19 AM

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

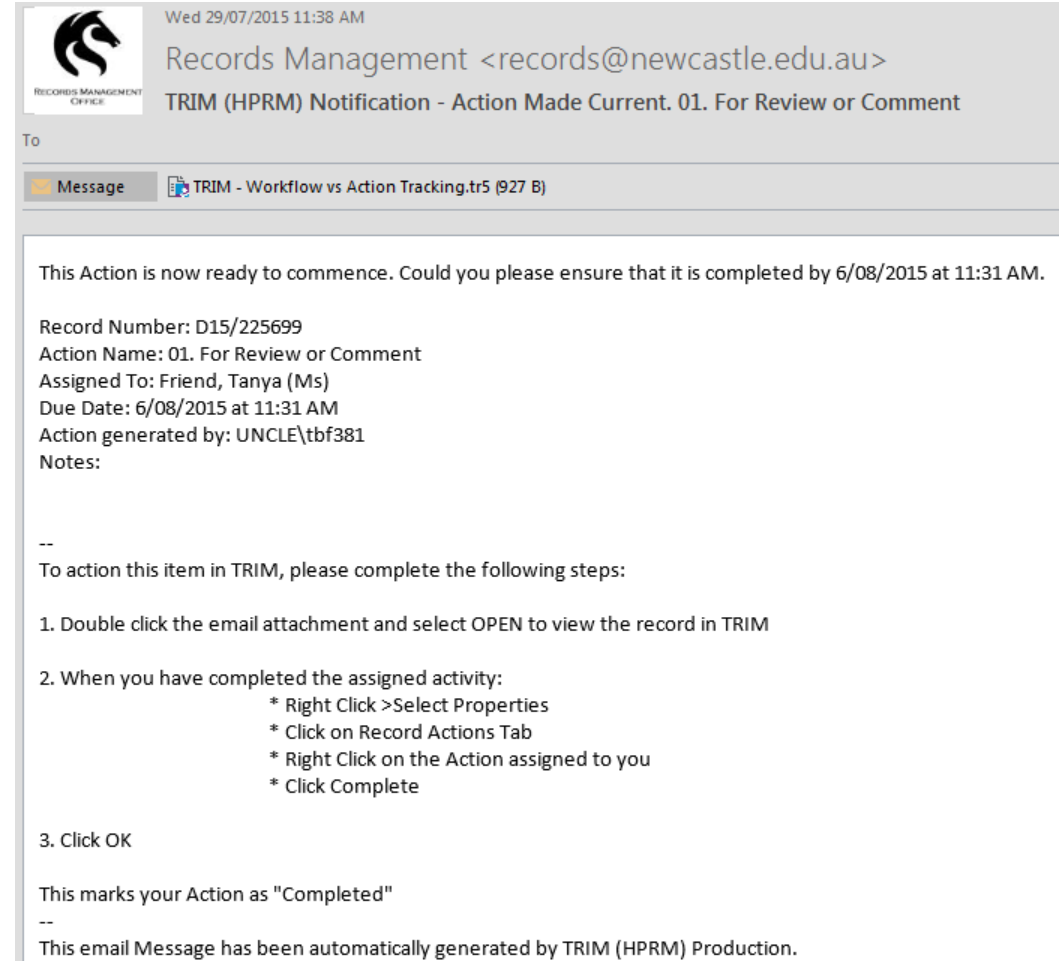
No Action

Click OK

OK Cancel Help

- The responsible location will receive an email notification advising them they have an action to complete

For instructions on completing an action refer to the **Complete an Action** Quick Reference Guide



Wed 29/07/2015 11:38 AM

Records Management <records@newcastle.edu.au>  
TRIM (HPRM) Notification - Action Made Current. 01. For Review or Comment

To

Message TRIM - Workflow vs Action Tracking.tr5 (927 B)

This Action is now ready to commence. Could you please ensure that it is completed by 6/08/2015 at 11:31 AM.

Record Number: D15/225699  
Action Name: 01. For Review or Comment  
Assigned To: Friend, Tanya (Ms)  
Due Date: 6/08/2015 at 11:31 AM  
Action generated by: UNCLE\tbf381  
Notes:

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To action this item in TRIM, please complete the following steps:

1. Double click the email attachment and select OPEN to view the record in TRIM
2. When you have completed the assigned activity:
  - \* Right Click >Select Properties
  - \* Click on Record Actions Tab
  - \* Right Click on the Action assigned to you
  - \* Click Complete
3. Click OK

This marks your Action as "Completed"

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This email Message has been automatically generated by TRIM (HPRM) Production.

## Appendix A – Available Actions for General Use









Action	Purpose
<p>For Review or Comment</p> <p>3 Days</p>	<p><b>Use:</b> 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</p> <p><b>Actions:</b></p> <ul style="list-style-type: none"> <li>Review the document/s</li> <li>Provide comments</li> <li>Complete the action in TRIM</li> </ul> <p><b>Note!</b> Can also be used in conjunction with 'Return To'</p>
<p>For Approval</p> <p>3 Days</p>	<p><b>Use:</b> 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.</p> <p>It can also be added multiple times for various levels of approval.</p> <p><b>Actions:</b></p> <ul style="list-style-type: none"> <li>Review the document/s</li> <li>If <b>Approved</b> - Complete the action in TRIM</li> <li>If <b>Not Approved</b> – Seek additional information from the originator</li> </ul> <p><b>Note!</b> Can be used in conjunction with 'Return To'</p>
<p>Print for Physical Signature</p> <p>4 Days</p>	<p><b>Use:</b> 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.</p> <p><b>Actions:</b></p> <ul style="list-style-type: none"> <li>Print the Document/s</li> <li>Sign</li> <li>Scan the document/s at a minimum 300dpi and place over the original</li> <li>Complete the action in TRIM</li> </ul> <p><b>Note!</b> Can also be used in conjunction with 'Return To'</p>

Action	Purpose
<p>Return To</p> <p>2 Days</p>	<p><b>Use:</b> This action is designed to be used when you want to be notified that an action / approval has been completed.</p> <p>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.</p> <p><b>Actions:</b></p> <ul style="list-style-type: none"> <li>Add this action at any point in the process where notification is required</li> <li>Complete the action in TRIM</li> </ul>

### 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