Purpose

This document is designed to assist staff with the function of completing an Action in TRIM.

Email Notification

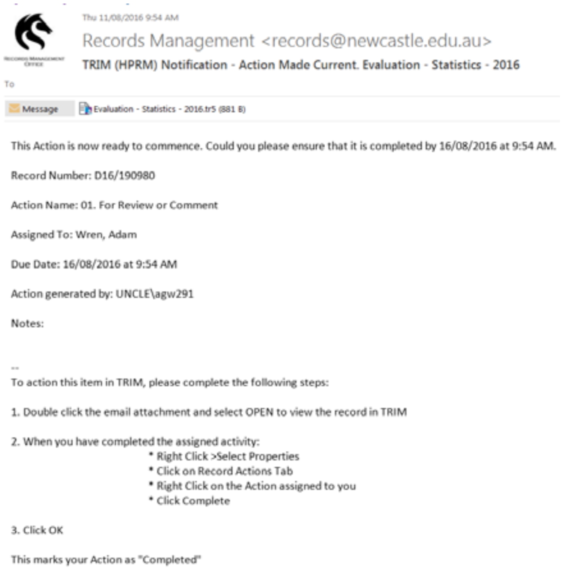
When an action is assigned to you an automatic email notification will be sent to your Newcastle University email address.

The message Subject will contain the **Status** of the action (e.g. Current, Overdue etc.), the **Record Number** and the **Activity** (e.g. For Approval, For Comment etc.)

The email will contain:

- an attachment to the record that requires action
- a summary of the Action
- Instructions on how to mark the action complete

- Double Click on the attachment to open the document in TRIM



Thu 11/08/2016 9:54 AM

Records Management <records@newcastle.edu.au>

TRIM (HPRM) Notification - Action Made Current. Evaluation - Statistics - 2016

To

Message | Evaluation - Statistics - 2016.tr5 (881 B)

This Action is now ready to commence. Could you please ensure that it is completed by 16/08/2016 at 9:54 AM.

Record Number: D16/190980

Action Name: 01. For Review or Comment

Assigned To: Wren, Adam

Due Date: 16/08/2016 at 9:54 AM

Action generated by: UNCLE\agw291

Notes:

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

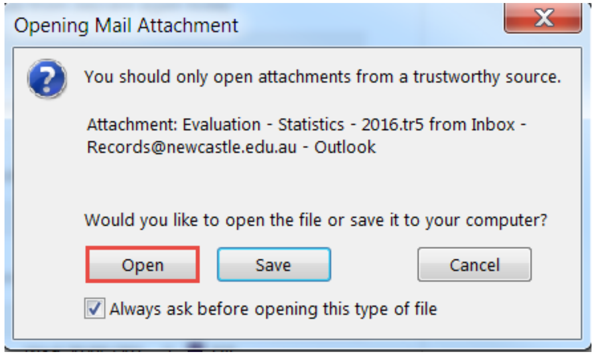
1. Double click the email attachment and select OPEN to view the record in TRIM

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

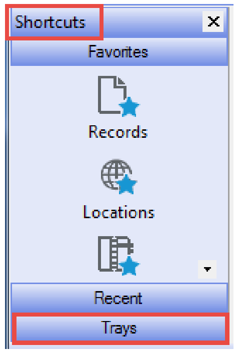
This marks your Action as "Completed"

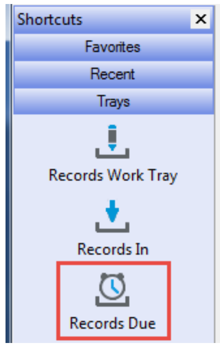
- Click Open



Note! If you do not have the email with the attachment you can find all your assigned actions in your 'Records Due Tray' in TRIM

- Select 'Trays' from your Shortcuts bar in TRIM
- Click 'Records Due Tray'





Completing the Action

TRIM will launch and the record will be retrieved

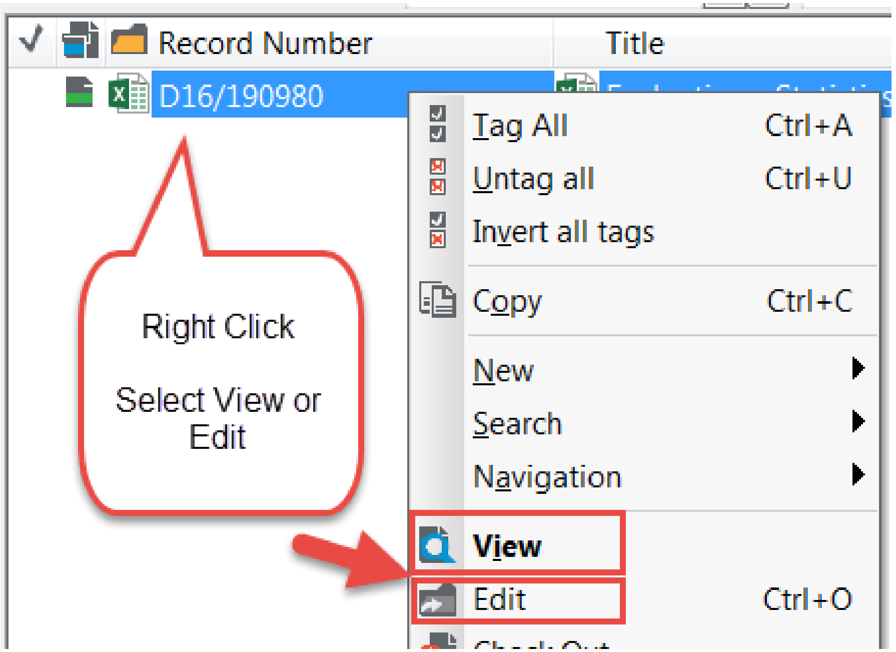
Note! If you have not been given access to the document in TRIM, it will not be presented.

Depending what action is required you can either open the document to edit (update) or view (read only)

Note! If you need to edit a document in TRIM you will need to open the document in edit mode.

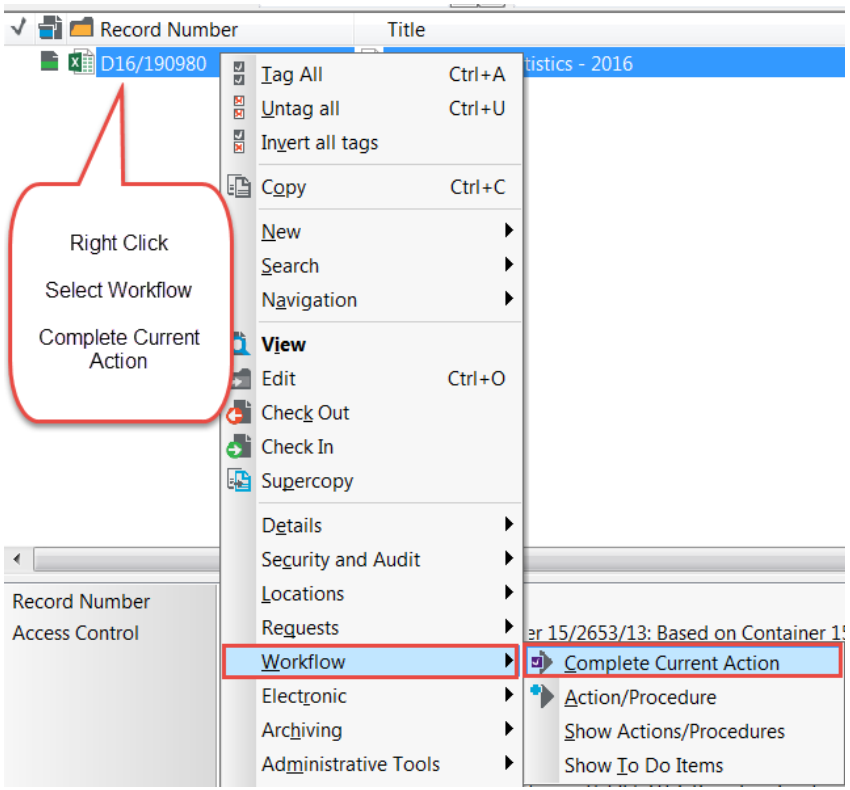
To View or Edit the Document

- Right Click
- Select View or Edit



After closing the document, you need to complete the action in TRIM.

- Right Click on the document
- Workflow



Your action has now been marked as "Completed"