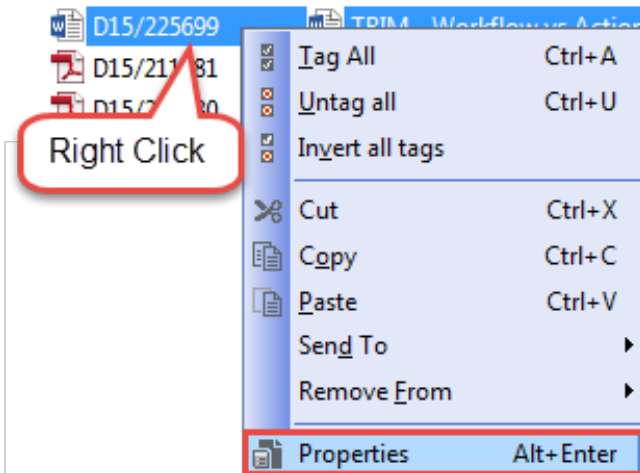


Purpose

This document is designed to assist staff with the function of inserting an additional action to a record that already has actions assigned.

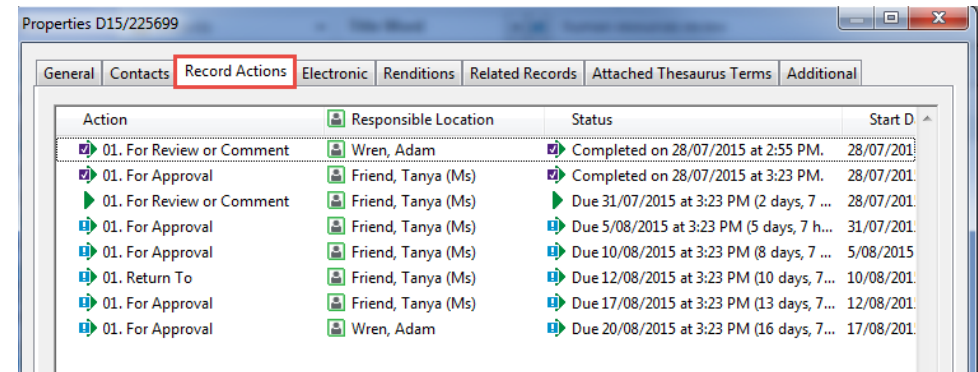
For example: If you receive a FOR APPROVAL and you want to add a For Review or Comment action before you complete the Approval

- Locate the document in TRIM
- Right Click > Properties

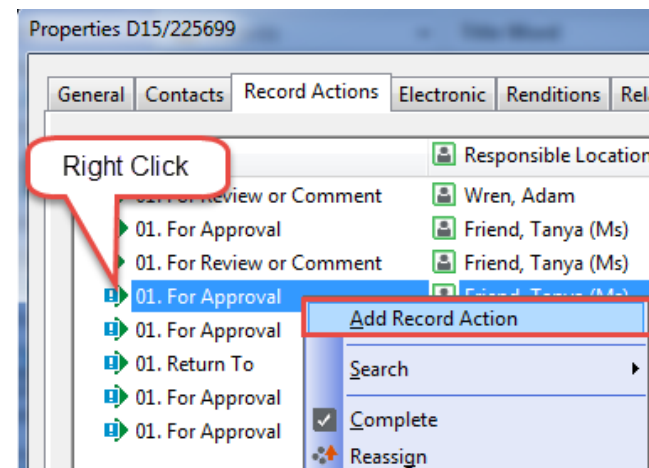


- Click the Record Actions Tab

All actions attached to the record will be displayed



- Right Click on the action adjacent to where you want to insert the new action
e.g. Right click on For Approval if you want to insert the new action either before or after it
- Click Add Record Action





Inserting an Action

- Select the required action and the responsible location
- Select the appropriate option to insert the action

Note! The nominated action will be the one that was highlighted when you right clicked to insert the action

- Click OK

The inserted action will be displayed in the nominated sequence

Note! The status and the due dates of the other actions will change depending on the duration of the new action

Action	Responsible Location	Status	Due Date
01. For Review or Comment	Wren, Adam	Completed on 28/07/2015 at ...	31/07/2015 at 10:56 AM
01. For Approval	Friend, Tanya (Ms)	Completed on 28/07/2015 at ...	31/07/2015 at 2:55 PM
01. For Review or Comment	Friend, Tanya (Ms)	Due 31/07/2015 at 3:23 PM (2...	31/07/2015 at 3:23 PM
01. For Review or Comment	Wren, Adam	Due 5/08/2015 at 3:23 PM (5 ...	5/08/2015 at 3:23 PM
01. For Approval	Friend, Tanya (Ms)	Due 10/08/2015 at 3:23 PM (8...	10/08/2015 at 3:23 PM
01. For Approval	Friend, Tanya (Ms)	Due 13/08/2015 at 3:23 PM (1...	13/08/2015 at 3:23 PM
01. Return To	Friend, Tanya (Ms)	Due 17/08/2015 at 3:23 PM (1...	17/08/2015 at 3:23 PM
01. For Approval	Friend, Tanya (Ms)	Due 20/08/2015 at 3:23 PM (1...	20/08/2015 at 3:23 PM
01. For Approval	Wren, Adam	Due 25/08/2015 at 3:23 PM (1...	25/08/2015 at 3:23 PM