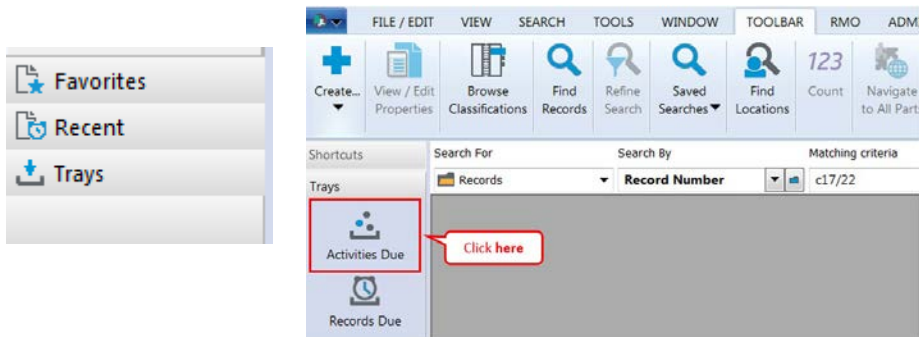


This guide covers the following topics relating to the use of the TRIM Workflow Module:

- |                                    |                                 |
|------------------------------------|---------------------------------|
| 1. Access Current Activities       | 7. Rollback Workflow Activities |
| 2. Navigation                      | 8. Access Saved Searches        |
| 3. Show Records/Applications       | 9. Export Saved Search Results  |
| 4. Acquire Activities              | 10. Add Notes                   |
| 5. Complete Activities             | 11. Add a Status                |
| 6. Relinquish an Acquired Activity |                                 |

## 1. Access Current Activities

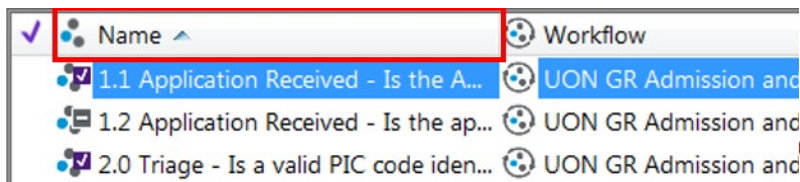
Current activities assigned to you or your position will be in your **Activities Due** tray. You can locate them via the **Trays** tab in the **Shortcuts** bar on the left hand side of your TRIM screen:



## 2. Navigation

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

1. Right-click on the required HDR Admissions & Scholarship Sub-Folder
2. Select **Workflow** → **Show Activities**



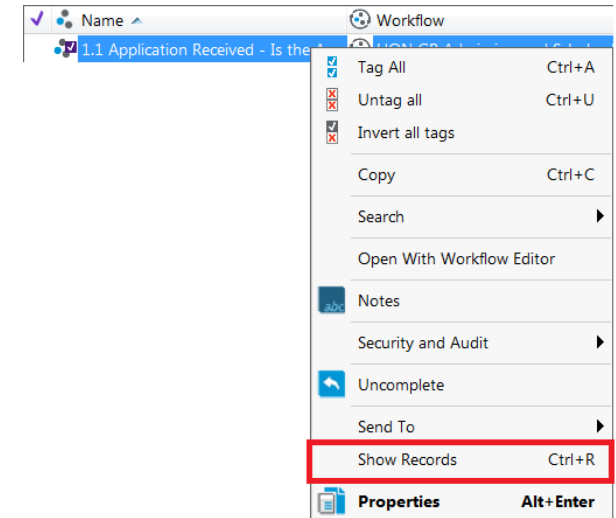
**Hint:** Ensure activities are in process order by left clicking on the **Name** column header

## 3. Show Records/Applications

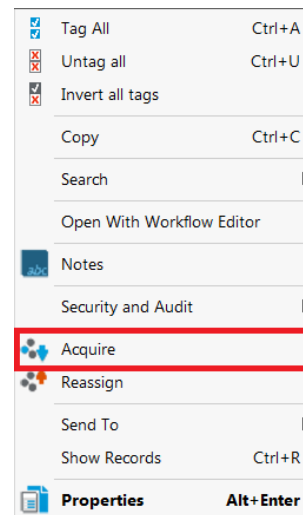
To navigate to the application and associated documents from the current activity:

1. Right-click on the activity
2. Click **Show Records**
3. To open and edit a file, right-click and select 'Edit'

**NB:** do not double-click on the activity to open the records; this may complete the activity




## 4. Acquire Activities



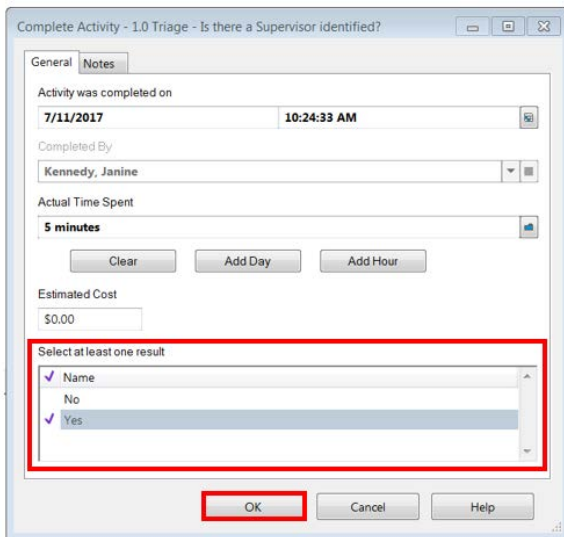
The Workflow Module is based on positions (not people) and as such workflow activities will be assigned to a position. If an activity is assigned to your default position then you will **not** need to acquire it first in order to perform actions on these activities (complete etc.). However, if an activity is assigned to a position you are a member of (but it is not your default position) then you must first **Acquire** the activity before you can perform an action on it. An example of this might be if an RTO for a Faculty needed to complete an activity on behalf of their ADRT. To acquire an Activity:

1. Right-click on the activity
2. Click on **Acquire**

## 5. Complete Activities

1. Go to your Activities Due tray – locate the application activity
2. Right-click on the activity
3. Click on **Complete**. Once complete, the icon on the activity will change to a tick 

*(NB - some activities will require the user to select an option (such as Yes or No) in order to complete the action. Please see below example)*



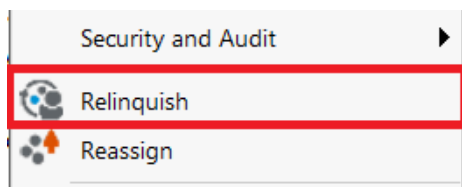
When prompted, select the appropriate option and click OK

## 6. Relinquish an Acquired Activity

You should relinquish an activity only after you have acquired it and become aware that you will not be available to complete the activity (I.e on leave).

Relinquishing an activity will reassign it back to the original group position assignee so another team member can acquire and complete the activity.

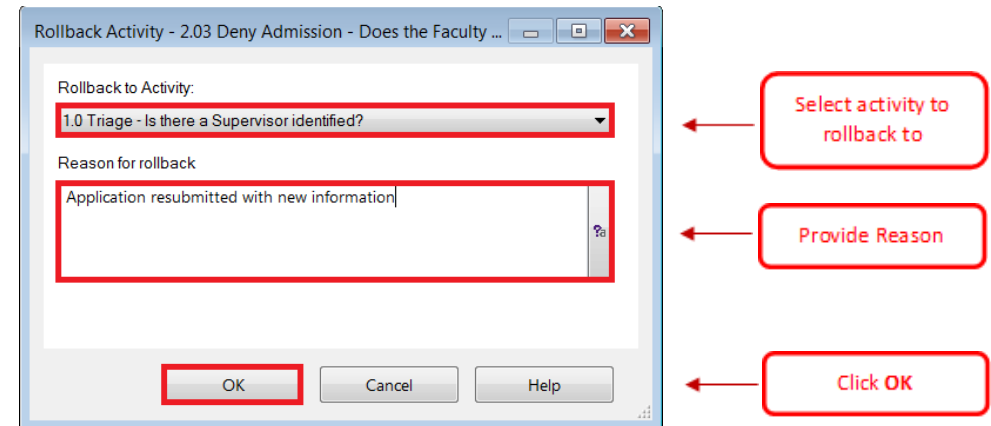
1. Right-click on the activity
2. Click on **Relinquish**



## 7. Rollback Workflow Activities

Rollback enables you to roll the Workflow back to an activity's predecessor.

1. Right-click on the activity
2. Click on **Rollback** (The Rollback Activity window will be displayed)

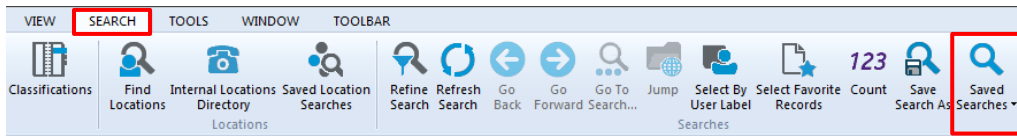


**NB:** if you do not see the option of Roll-back in your drop-down menu you will have to first Reassign the current activity to your position – you can do this by using the Reassign option found by right-clicking on the activity – then repeat the steps above. Once complete, Reassign the activity back to the original position holder.

## 8. Access Saved Searches

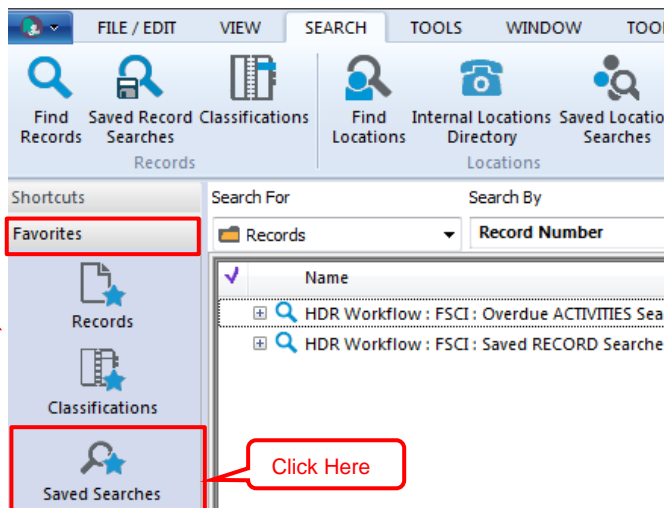
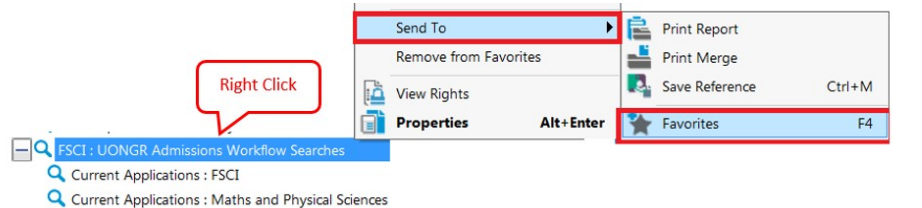
A number of saved searches have been configured to enable you to run reports and statistics.

1. Click the Search tab
2. Click on Saved Searches



This will provide a list of all previously created and saved searches in TRIM that you have appropriate access controls to see. **NB:** the titles of saved searches pertaining to this workflow begin with 'HDR Workflow'

Once you have located the saved search(es) that applies to your Faculty, School, Department etc. add them to your favorite saved searches via the below instructions:



To access your favorite saved searches; select **Saved Searches** from the **Favorites** tab on your Shortcuts bar

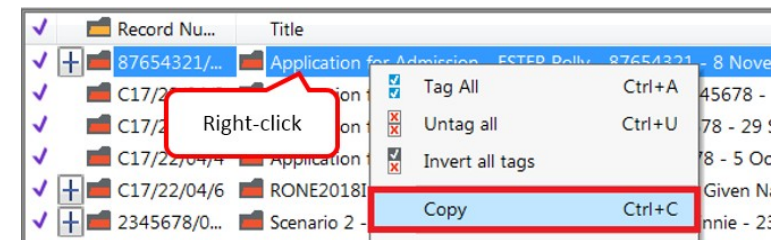
## 9. Export Saved Search Results

The easiest way to export saved search results is to copy and paste the data in to an Excel Spreadsheet.

1. Run your saved search by double clicking on the required search (results will be displayed in a list)
2. Right-click on any of the records returned in your search
3. Click **Tag-All**



4. Right-click again on any of the records and select **Copy**. You will be prompted to confirm the copy and confirm to copy all records



5. Open a new blank **Excel Spreadsheet** and **paste** the data

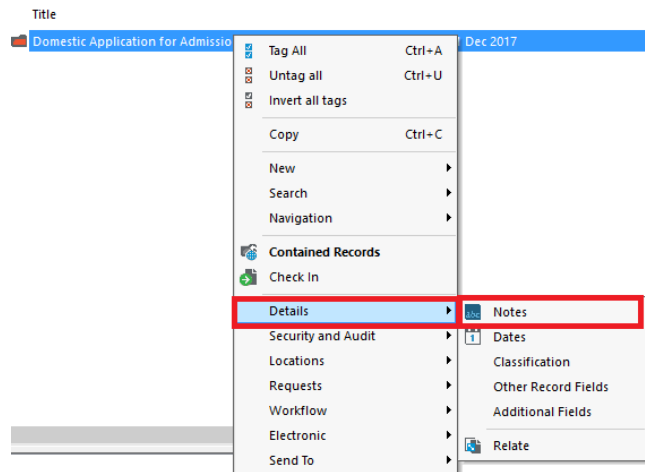
| Record Number | Title   | Fast Track Application? | Faculty            | School                                       | Application Received |
|---------------|---|-------------------------|--------------------|--|----------------------|
| 1             | 87654321/09-10/3  | No                      | Faculty of Science | School of Biomedical Sciences and Pharmacy   | 8/11/2017            |
| 2             | Application for Admission - ESTER Polly - 87654321 - 8 Nov                  | No                      | Faculty of Science | School of Psychological                      | 3/07/2017            |
| 3             | Application for Admission - STEVENSON Laura - 12345678                      | No                      | Faculty of Science | School of Mathematical and Physical Sciences | 29/09/2017           |
| 4             | Application for Admission - SAMSON John - 12345678 - 29                     | No                      | Faculty of Science | School of Mathematical and Physical Sciences | 5/10/2017            |
| 5             | Application for Admission - BARKER Emily - 12345678 - 5 C                   | No                      | Faculty of Science | School of Environmental and Life Sciences    | 5/10/2017            |
| 6             | C17/22/04/6 RONE20181 - Application for Admission - SURNAME Given           | No                      | Faculty of Science | School of Environmental and Life Sciences    | 8/11/2017            |
| 7             | 2345678/01-01/2 Scenario 2 - Application for Admission - BAYGOH Winnie      | No                      | Faculty of Science | School of Environmental and Life Sciences    | 5/10/2017            |
| 8             | C17/22/04/5 Application for Admission - LEMERSON Roger - 12345678           | No                      | Faculty of Science | School of Environmental and Life Sciences    | 5/10/2017            |
| 9             | C17/22/04/7 RONE20181 - Application for Admission - SURNAME Given           | No                      | Faculty of Science | School of Environmental and Life Sciences    | 5/10/2017            |
| 10            | 87654321/09-10/2 Application for Admission - ESTER Polly - 87654321 - 6 Nov | Yes                     | Faculty of Science | School of Mathematical and Physical Sciences | 6/11/2017            |
| 11            | 2345678/01-01/1 Scenario 1 - Application for Admission - BAYGOH Winnie      | No                      | Faculty of Science | School of Mathematical and Physical Sciences | 8/11/2017            |

**NB** - this will copy and paste the same columns displayed in your TRIM screen into the Excel columns. If you require different data ensure you add/remove the appropriate columns in TRIM prior to copying

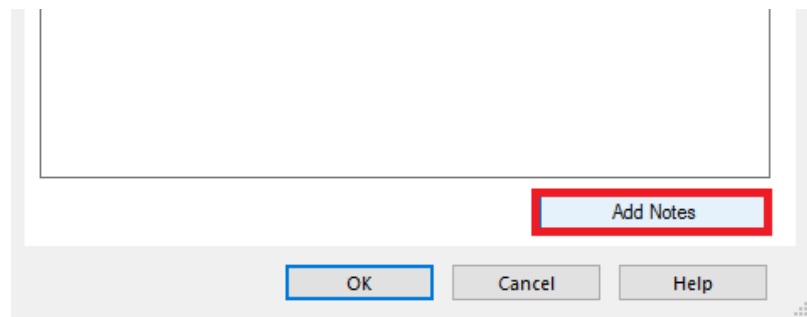
## 10. Add Notes

Adding a Note allows you to share key information on an applicant's file with other TRIM users. It is recommended that Notes are placed on the Application for Admission folder.

1. Locate the application record (see 3. Show Records/Applications)
2. Right-click on the folder
3. Click on **Details** → select **Notes**



4. Click **Add Notes**



5. Add a note in the box and click **OK**

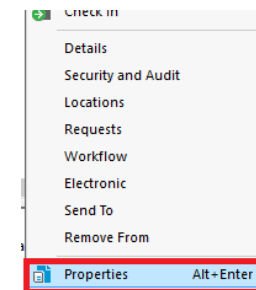
## 11. Add a Status

There a range of statuses that may be applied to a record throughout the application process. The one that most pertains to Faculty users is at activity '4.06: Supervisor Admissions Assessment'. In order to indicate that an application has been sent to a supervisor for assessment, the RTO or School Officer can apply the '4.06 – Application sent to Supervisor' status. This will help the RTO/School Officer monitor the state of applications at this activity.

1. Locate the application record (see 3. Show Records/Applications) – this will show the red Application for Admission/Scholarship folder

2. Right-click on the folder

3. Click on **Details** → select **Properties**



4. Maximize the window and ensure the Status – UON GR Admission Process field is clear



5. Click the blue kwik select button to the right of the field.

6. Select '4.06 – Application sent to Supervisor' status, Click **OK**

4.02 - Application Documents Received

**4.06 - Application sent to Supervisor**

4.09 - Review Request for Revised Scores

7. If a Status has been added: Add today's date to **Date Status Field Last Updated**

**NB:** once an application has been received back from the supervisor, the status and date information should be removed.