

This Guide covers the following topics relating to the use of the TRIM Workflow Module in the Web Client:

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

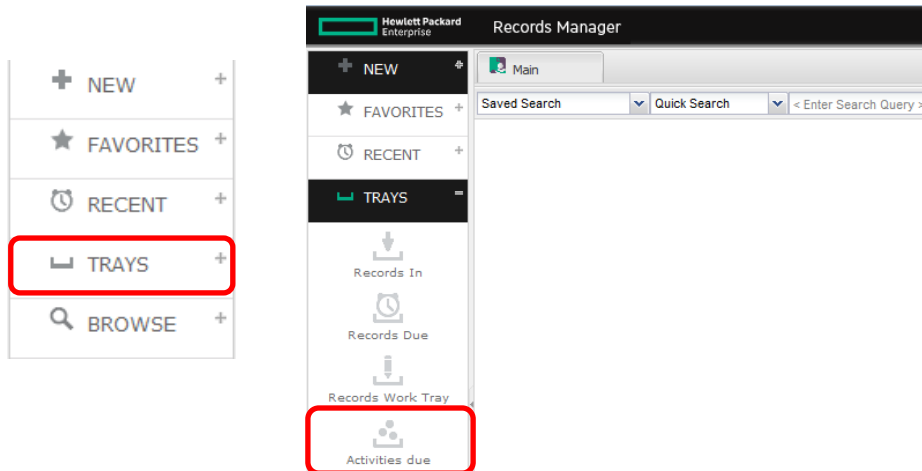
NB:

- You must be connected to the University Network either on-site or via VPN for you to gain access to the University of Newcastle TRIM Web Client
- Mozilla Firefox is the recommended browser
- The URL to enter in your browser is: <https://records.newcastle.edu.au>
- A full web client guide is available by clicking [here](#) and selecting **TRIM Web Client Guide**

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:

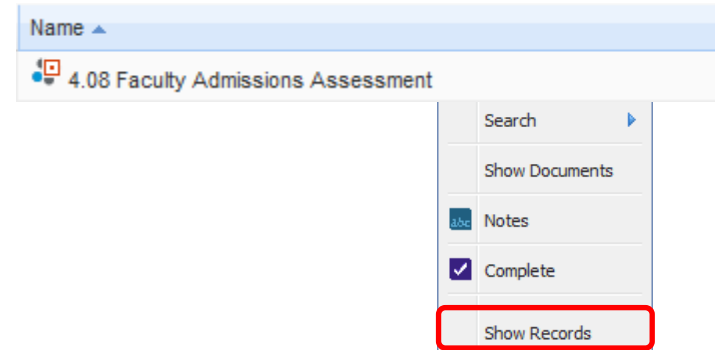
1. Click on the **Trays** tab
2. Click on the **Activities due** button



2. Show Records/Applications

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

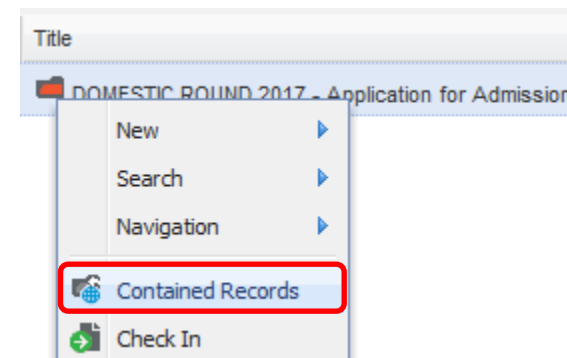
1. Right-click on the activity
2. Click **Show Records**



3. The red HDR Admissions & Scholarship Application for Admission folder should appear, similar to the below:

Record Type	Record Number	Title
HDR ADML...	12345678/16-01/7	DOMESTIC ROUND 2017 - Application for Admission - FRAPPLES Bob - 12345678 - 16 October 2017

4. To see the sub-folders contained within this red folder, you need to right-click on the red folder and select **Contained Records**:

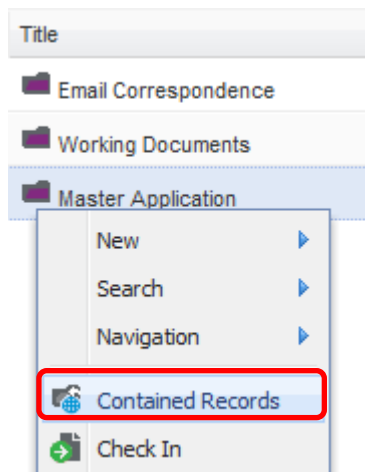


5. The purple sub-folders contained within each application will appear on screen:

✓	Record Type	Record Number	Title
	ELECTRO...	12345678/16-01/7/1	Email Correspondence
	ELECTRO...	12345678/16-01/7/2	Working Documents
	ELECTRO...	12345678/16-01/7/3	Master Application

NB: the Working Documents subfolder is used for the Triage and English Language Relaxation stages; the Master Application will contain the full admissions assessment form (activity 4.06 onwards).

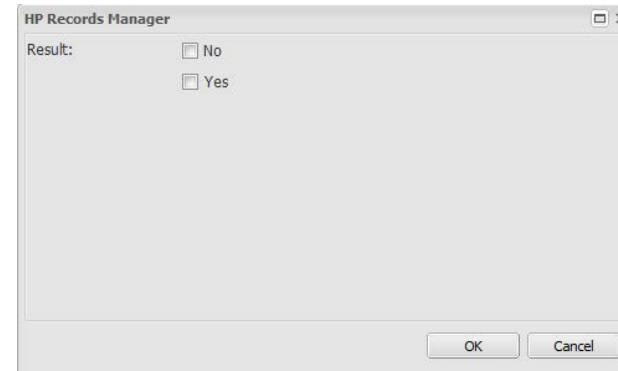
6. To see the contents of any of these sub-folders, right-click on the required sub-folder and select **Contained Records**:



3. Complete Activities

1. Go to your **Activities due** tray on the left of your screen – locate the application activity you wish to complete
2. Right-click on the activity
3. Click on **Complete**. *Once complete, the activity will disappear from your Activities due tray*

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



When prompted, select the appropriate option then click **OK**

4. 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 red HDR Admissions & Scholarship Application for Admission folder
2. Select **Workflow → Show Activities**

Name	Activity State
1.01 Application Received - Is the Application for Scholarship Only?	Finally Completed
1.02 Application Received - Is the application from a current student?	Skipped
2.0 Triage - Is a valid PIC code identified?	Finally Completed
2.01 Round or Non-Round? - Is the application to be assessed as part of the round?	Finally Completed
2.02 Triage: Blanket Ruling - Is a Faculty blanket ruling in place denying admission if no PIC code?	Skipped
2.03 Triage: Round or Non-Round? - Is the application to be assessed as part of the round?	Skipped
2.04 Triage - RTO progresses to HOS (via School Admin Officer)	Skipped
2.05 Triage: School Supervisor Nomination - Does the School nominate a Supervisor?	Skipped
2.06 Triage: Deny Admission - Faculty to confirm that admission denied	Skipped

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

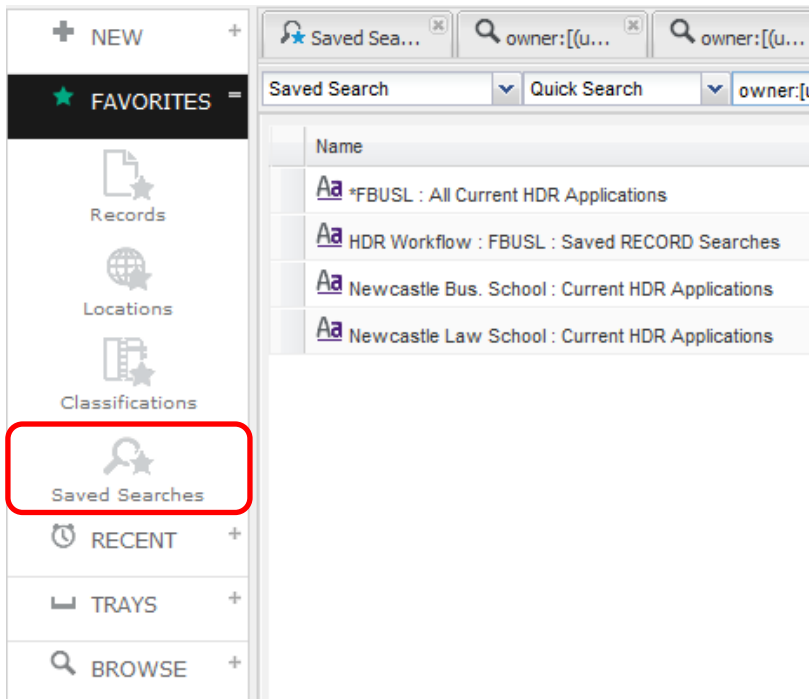
5. Access Saved Searches

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

Records Governance Services or the Graduate Research Office can assist you with adding any required saved searches into your **Favorite Saved Searches Shortcut**.

Once they have been set up, to access and run your favorite saved searches;

1. Select **Saved Searches** from the **Favorites** tab in your Shortcuts bar on the left of your TRIM screen:



2. To run any of your Favorite Saved Searches; right-click on the saved search and select **Open**

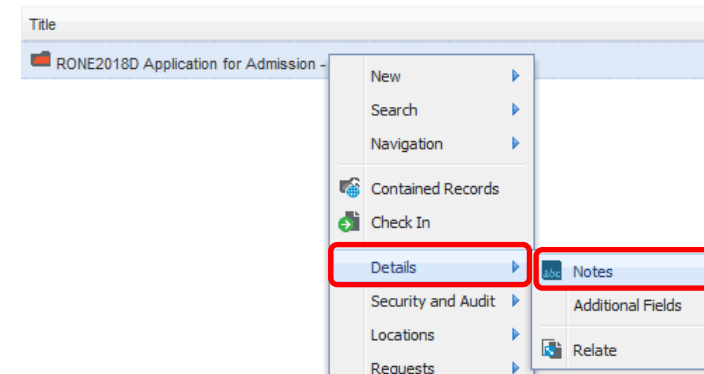
6. Rollback Workflow Activities

Rollback enables you to roll the Workflow back from the current Activity to a preceding Activity. Unfortunately the Rollback function is not available in the Web Client, therefore if you require an Activity to be rolled back please contact your administration support or the Graduate Research Office.

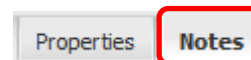
7. Add Notes

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 red HDR Admissions & Scholarship Application for Admission folder.

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



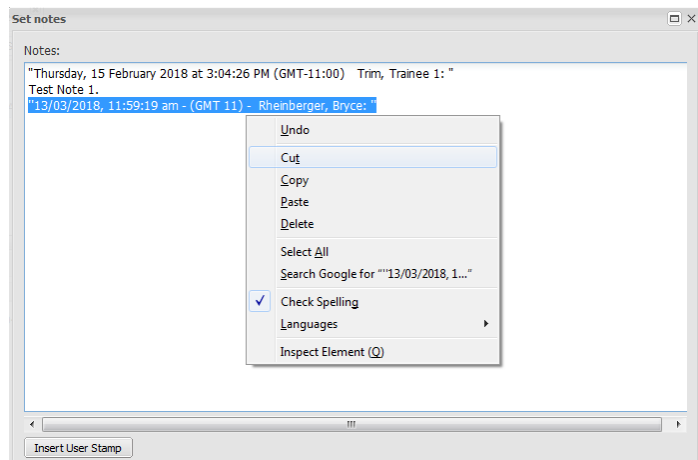
4. Click the **Insert User Stamp** button - the current date and time, as well as your name will be inserted into the notes
5. Type your note under the user stamp, then click **OK**
6. To review any current notes on a red HDR Admissions & Scholarship Application for Admission folder, click on the folder once, then click on the **Notes** tab at the bottom left of your TRIM screen:



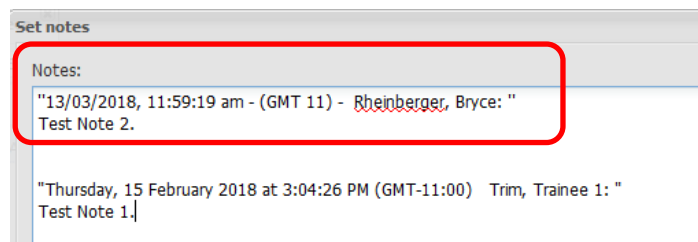
NB: Please refer to the information on the next page regarding adding notes to records when the record already contains notes.

When a record already contains notes: The correct practice is to place new notes at the top so they appear first when staff are reviewing the Notes field. However, if there are already some notes on this folder, the User Stamp will insert at the bottom of the existing notes (this is the default behavior of the Web Client and unfortunately where the User Stamp inserts can't be changed). You can however cut and paste the user stamp so it appears at the top, and then type your note under it (please see instructions below):

- Highlight the user stamp
- Right-click → Cut



- Click at the top of the existing Notes
- Right-click → Paste
- Press **Enter** on your keyboard a few times to put some space between the old notes and the new note
- Type your new note underneath the User Stamp you just inserted

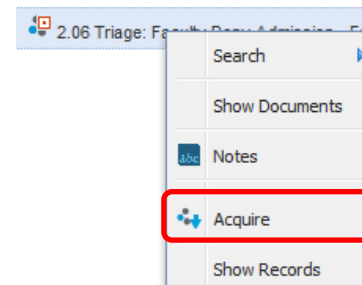


- Click **OK**

8. 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**



3. The **Assigned To** column will now show your name

9. 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**

