CITY PARKLANDS SERVICES

TRIM / Content Manager User Training Manual

South Bank Parklands

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Document Details

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Major Revision History

Revision	Date	Author	Notes
1	18/11/2013	Wayne Spence	Version 1
2	05/02/2015	Heather Mitchell	Version 2 – reformat of manual
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Related Documents

Record #	Title	Notes
F/14/446	RECORDS AND INFORMATION MANAGEMENT - Advice - Recordkeeping	Folder contains a series of Tips and Tricks related to TRIM / CM / Content Manager use
D/19/14657	Records and Information Management Policy	
D/1526189	RM001 - Storage of Inactive Records	
D/16/8456	RM002 - Retention and Disposal of Records in TRIM	
D/16/8455	RM003 Record Titling and Data Entry in TRIM	
D/19/17466	The Great TRIM Scavenger Hunt - for use with full TRIM training	Assessment tool for searching and navigation

Table of Contents

1. Purpose

This document provides step-by-step instructions for users of the electronic document and records management system, HP TRIM / Content Manager (TRIM / CM) Version 9.2.

Pre-requisite/Training (if applicable)

Trainees should read and understand the Records Information Management Policy (D/14/6211). Trainees should also have had previous experience using Windows-based software.

Personal Protective Equipment (if applicable) N/A

All City Parklands Services representatives must complete TRIM / CM training if their daily role requires using or creating Company records. TRIM / CM training for new users should take about one and a half hours initially and covers eight key components as follows:-

- Recordkeeping in City Parklands
- Navigating TRIM / CM
- Searching
- Favorites
- Creating and Editing Records
- Locations
- Access Controls and Security
- Email

The manual also contains instructions on:

- Creating Folders
- Relating records
- Moving documents between Folders

Acknowledgements: SEQWater TRIM User Manuals.

2. Navigating This Manual

2.1 Manual Conventions

This	Means
	Tip – things you need to know
	Directs you to further information on a topic
	Indicates an exercise to be completed
Search > Find Locations	Follow the right click menu sequence
F5	Press this function key
CTRL F	Hold down the control key while pressing another key

2.2 TRIM / CM Icons and Shortcuts

This	Means
	**Drop Down List** - The black arrow at the right end of an entry field. When selected, predetermined information will be displayed that is relevant to the field, usually information you have used previously.
	**KwikSelect** - The blue icon to the right of an entry field. Clicking this button will either display a list of information to select from in order to fill the text field, or it will display a TRIM / CM / CM Search.
	**Tagging** - The tag function in TRIM / CM allows the user to select multiple entries and apply the same function/action to them. Tag items by clicking to the extreme left of the record, or use **CTRL A** and **CTRL U** to tag or untag all items in the list.
Shortcut Keys	**Space bar** – Tags/Untags the currently highlighted record **F1** – Opens TRIM / CM Help **F4** – Adds the selected item/s to Favourites **F5** – Refreshes the current window and updates the status of any records you have modified **F6 –** Reloads all windows (including those minimised) and clears the cache. **F7 –** Allows you to refine your Search **CTRL A** – Tags all records **CTRL F** - Opens the **Search For Records** window to begin a new search **CTRL G –** Displays all Saved Record Searches for selection **CTRL I** - Displays your favourite locations **CTRL J –** Jumps up one level when viewing Locations or Classifications **CTRL M –** Makes a TRIM / CM reference for selected item(s) **CTRL O** – Opens a document for editing **CTRL S** – Saves the current record **CTRL U** – Untags all records **CTRL F1** – Hides the Ribbon **CTRL F2** – Displays the list of your Recent Documents **CTRL F3** – Allows you to browse the Classification Scheme **ALT Enter** – Displays the Properties of the selected record **ALT F1** – Displays the list of Documents you have Checked Out **ALT F2** – Displays folders and boxes listed in My Containers **ALT F3** – Displays Favourite Records

2.3 Glossary of Terms

When using TRIM / CM / CM, it's handy to become familiar with some specific terminology:

Check in	The function of saving an email, Word Document, Excel spreadsheet or PowerPoint presentation into TRIM / CM / CM, including returning a record which has been checked out for editing.
Check Out	The function used to edit an existing TRIM / CM / CM record. Check Out transfers a record to another location external to TRIM / CM /CM e.g. Offline Records or a local drive for editing purposes. While Checked Out, the record is locked and other users are restricted to read-only access.
Container	Folders and Boxes are containers within TRIM / CM because they can contain something below them in the hierarchy. i.e. Folders can contain Documents; Boxes can contain Folders and Documents
Current Location	The place (either a Position or physical location) where the record is currently located. Putting a person's name or Position in the Current Location field allocates the record to them and can be viewed in the person's **Records In Tray**. For purely electronic records, it is preferable to enter **<at home>** in the Current Location field, unless you wish to allocate the record to someone for action. TRIM / CM / CM is set up to default the Current Location information as much as possible based on the record creator's user profile.
Document	Recorded information or an object that can be treated as a unit. Note: A document becomes a 'record' when it provides evidence of a business transaction. Examples include emails, Word documents, Excel spreadsheets, PowerPoint presentations, drawings, PDFs, etc
Locations	Locations represent people, groups and places that you can associate with records (including documents and folders) with.
Metadata	Metadata is 'data about data' – that is, descriptive data about records that allows users to locate them, and provides information about actions performed. Fields in TRIM / CM / CM such as Title, Author, Addressee, Related Records, Notes are all examples of metadata.
Offline Records	The default location used by TRIM / CM when a user Checks Out or Edits a document. Your Offline Records folder is located under H:/My Documents/.
Profile Form	A profile (Properties) form exists for each record type in TRIM, allowing you to enter the details/metadata describing the record you are creating e.g. title, folder/box, author, date, etc.
Records	Information created, received, and maintained as evidence and information by an organisation or person, in pursuance of legal obligations or in the transaction of business.
Reference	A shortcut link (.tr5 or .trf) which can be emailed to another TRIM / CM user or placed in Pinnacle or on the Intranet. Clicking the reference link opens TRIM / CM and navigates to the record.
Register	The process of saving a record or document into TRIM / CM.
Revision	In TRIM / CM, a revision of the document is automatically created with every edit and is accessible for viewing, extracting and tracking changes.
Supercopy	Copies an electronic document from TRIM / CM to Offline Records or a local drive of your choice.

3. Recordkeeping in City Parklands

3.1 Introducing Company Records

A company record is any form of information created or received by you in the course of your work. Company records provide evidence that a business activity or a decision has taken place. A company record can be defined as having administrative, financial, legal, historical, or community value.

Examples of Company records include:

- Financial records - Invoices, receipts, budgets, expenditure & compliance reports;
- Human resource records - Personnel files, rosters, timesheets, leave applications;
- Information Management and Technology – Security logs, Forms & Templates, Database Management, Right to Information (RTI), software licenses and maintenance agreements
- Contract records - contracts, variations to contracts, etc.;
- Payroll records - Pay distributions, superannuation and leave records, etc.;
- Board records - Board minutes, Board reports, etc.;
- Workplace health and safety records - Safety manuals, incident reports, etc.; and
- Operational records – patrol reports, work notifications, cleaning reports, lifesaving reports, maps, plans, drawings etc.

A company record is not just a document in paper or electronic format such as a Word document or Excel spreadsheet, but may be a:

CAD drawing	E-mail	Post-It-Note
Photograph	Video	Web Page
Compact disc	Plans and drawings	Voice Mail Transcript
Text message	DVD	Map

To identify a company record, there are some questions you can ask yourself:

- Did I create, send or receive it as part of my work?
- Does it provide evidence of how a decision was made that may impact on an individual, office or City Parklands as a whole?
- Does it document an approval, advice given or an action taken?
- Is it required to be kept by legislation, an agreement with a external body, a code of practice, an internal policy etc.?

If the answer to any of the above is "yes", then the item **is** a Company record and must be kept and managed in TRIM. The table below lists some examples of records and non-records (Note: this list is not exhaustive).

Records	Non-records
✓ Incoming and outgoing correspondence ✓ Records documenting business decisions/actions ✓ Documents that will go through drafting and approval stages ✓ Material providing reliable information, advice, instruction or a recommendation ✓ Emails documenting decisions made or actions taken in the course of daily business	× Personal documents/messages. × Advertisements and informational material received from external providers, e.g. catalogues, lists of suppliers, directories, address and contact lists × Informational material that includes × Copies or extracts of documents created for reference purposes or convenience × Draft documents that are not annotated or have not been circulated for comment × Templates

3.2 Why Do We Have to Keep Records?

Records are the corporate memory of the organisation:

- They tell us what, where and when something was done or why a decision was made
- They tell us who was involved and under what authority
- They provide precedents and information on which to base decisions.

The benefits of proper recordkeeping include:

- Increased business efficiency and client service
- Better access to corporate information, meaning more informed decisions
- Improved accountability and transparency
- Reduced costs associated with storage and retrieval
- Protection and support of individual employees and the organisation during litigation
- Risk minimisation and mitigation
- Ability to satisfy requests for information
- Compliance with legislation, Whole-of-Government policies and standards of best practice.

City Parklands has agreed to comply with the requirements of the *Public Records Act 2002* to **make and keep records of its business activities**. The greater the value a record has to CPS, the more important it is that you capture it into TRIM / CM to ensure properly management, retrieval and disposal.

3.3 Your Recordkeeping Responsibilities

Every employee of City Parklands, including temporary, casual and contract staff and consultants, has a few basic obligations:

- **Create accurate records routinely as part of your work** - Sometimes your work activities may automatically generate records e.g. sending an email, completing a form, writing a report. In other cases, you might need to deliberately create a record e.g. meeting minutes, documenting business-related phone conversations and face-to-face discussions, etc.
- **Capture records into TRIM / CM as soon as possible after you create or receive them** - If records aren't captured into TRIM, it becomes difficult or impossible for others to locate them when needed. They may even end up lost or destroyed. Remember: the records you create belong to City Parklands, not to you.
- **Handle records with care** – Records must be properly cared for, if they are to survive and be available for as long as they are required. For physical records, this means storing them in conditions that protect them from damage. For electronic records, it means keeping them in recordkeeping systems that are managed and backed up i.e. TRIM. For records stored on CDs, DVDs, USB drives, etc., ensure that the media is refreshed and backups created to ensure that the records remain accessible.
- **Don't destroy records without formal approval** – Failing to maintain records for the length of time they are needed puts you and City Parklands at risk of not being able to account for actions or decisions. This could result in monetary loss from penalties or litigation, public embarrassment or disciplinary action.
- **Protect sensitive records from unauthorised access** – Records can contain personal and confidential information which must not be disclosed to unauthorised persons. Keep any records storage areas secure, protect your passwords, and don't leave sensitive records lying around.
- **Find out about City Parklands recordkeeping policies and procedures –** If you supervise staff, ensure they attend training and know where to access the policies and procedures, too.

See D/14/6211 for the Records Information Management Policy and F/14/446 for more on procedures and guidelines.

	Exercise 1
	1. Records are hardcopy-based only. **True** / **False** (Please circle the correct response)
	2. An online complaint received from a member of the public stating that a City Parklands employee was rude to them at SBP, is a Company record. **True** / **False** (Please circle the correct response)
	3. An email from a friend inviting you to lunch is a Company record. **True** / **False** (Please circle the correct response)
	4. It is acceptable to store emails that are Company records in your Outlook inbox. **True** / **False** (Please circle the correct response)
	5. I can destroy or delete Company records whenever I like. **True** / **False**
	6. List two types of records you would commonly find in your business area: • ____________________ • ____________________

4. TRIM / CM Concepts

TRIM / CM is an electronic Document and Records Management System (eDRMS), which is used to control the creation, retrieval, use, storage and disposal of hard copy and electronic records. It acts as a central repository for Company records, allowing staff to:

- Share information
- Find complete and accurate information quickly and easily
- Manage version control of documents, including retrieval of past revisions
- Have a single authoritative source for records
- Save Outlook emails and MS Office documents directly into the system through built in integration
- Meet their obligations as an employee to make 'full and accurate records' of business activities in accordance with the *Public Records Act 2002*.

4.1 What Should Be Captured in TRIM / CM?

Records created or received by City Parklands staff that document business activities should be saved in TRIM / CM if they are not captured in any other official business system e.g. SEMS, Pinnacle, etc.

If you are the author of a document that qualifies as a record, it is **YOUR RESPONSIBILITY** to capture it into TRIM / CM (See **Chapter 7** for more details on responsibilities for capturing emails). All outgoing responses to email or physical correspondence must be captured into TRIM.

Paper records should be scanned into TRIM / CM to allow for easy access. After scanning, view the image to ensure it has been captured correctly.

See D/19/14654- Digitisation and Early Disposal of Hard Copy Records for more information on scanning and disposing of paper records.

Remember, if it was created, sent or received in the course of business, it should be **TRIM**med!

4.2 Where to Get Help with TRIM / CM

If you have any difficulties in using TRIM / CM, please contact the Records and Information Management Coordinator:

Phone: [redacted]

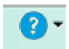
Email: [redacted]

4.3 Launching TRIM / CM

The TRIM / CM icon is located on your desktop

1. Double click the TRIM / CM icon to launch the application.
2. The first time you log in you may see the **Tip of the Day** window displayed:

3. The **Tip of the Day** window displays handy information on using TRIM / CM.

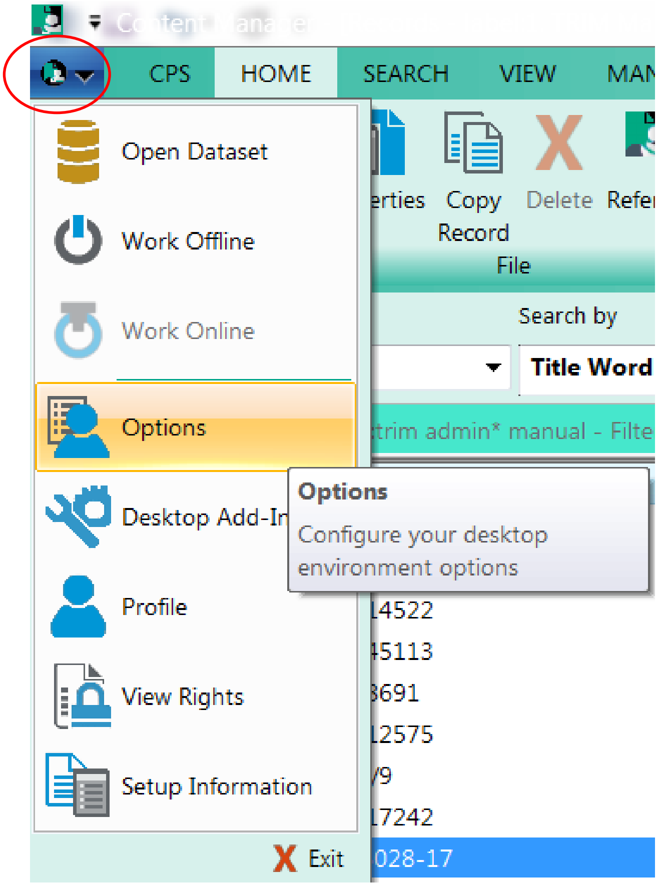
- You can click **Next** to scroll through the tips or click **Close to** stop it displaying during the current session.
- To deactivate the **Tip of the Day** pop-up, uncheck **Show Tips at Startup** at the bottom of the window.
- To reactivate the pop-up, click the  located at the top right of your screen and select **Tip of the Day**.

4.4 How to Get Your Global Settings

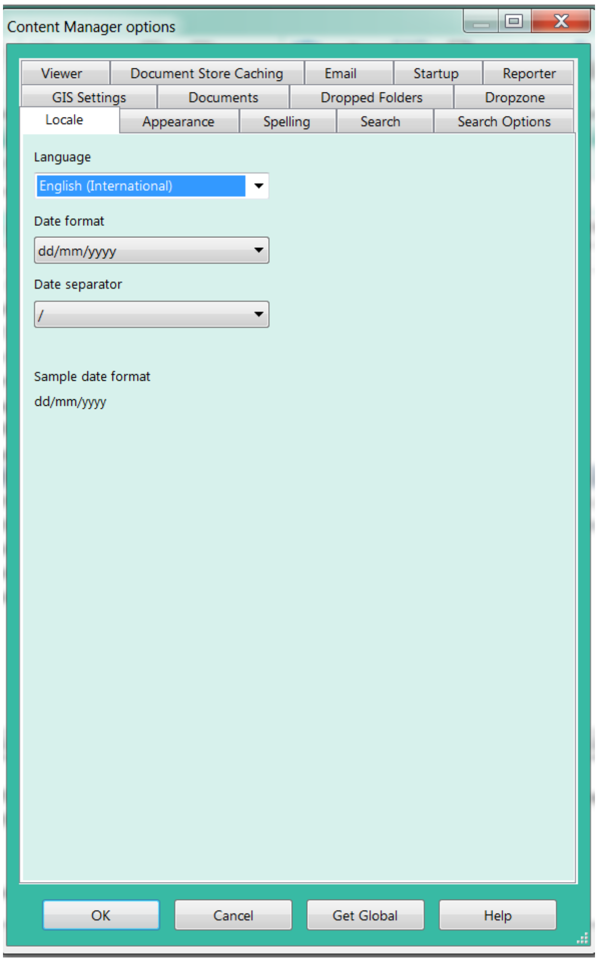
The Global settings configure your instance of TRIM / CM to the City Parklands-wide standard look and feel.

The first time you open TRIM / CM, the Global settings should come across automatically. If they don't, or if TRIM / CM forgets the settings:

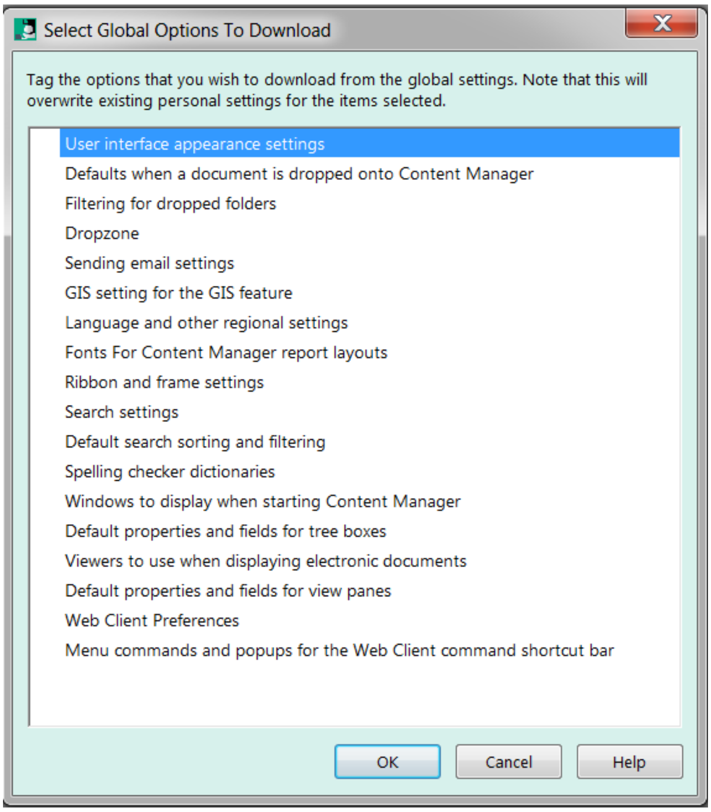
1. Click the **FILE** drop down menu at the top left of your screen, then select **Options**.



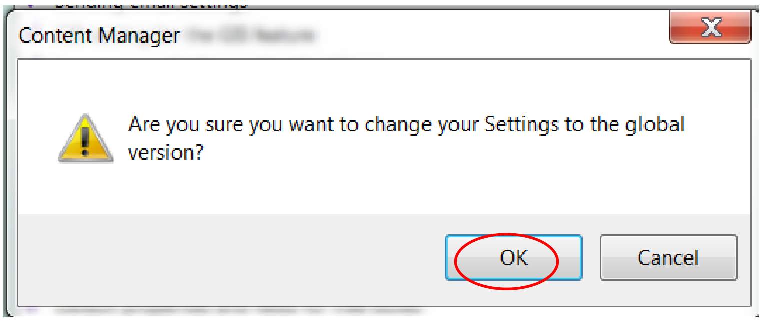
2. The **Content Manager Options** dialogue will open:



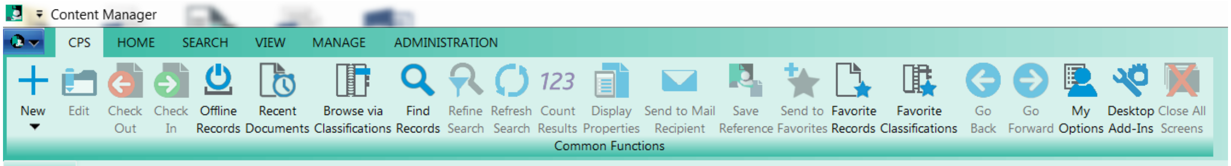
3. Click the **Get Global** button. The **Get Global Options to Download** screen will open:



4. Tag all the available options (**CTRL A**) and click **OK**.
5. TRIM / CM will ask you to confirm that you want to proceed. Click **OK** again to confirm.



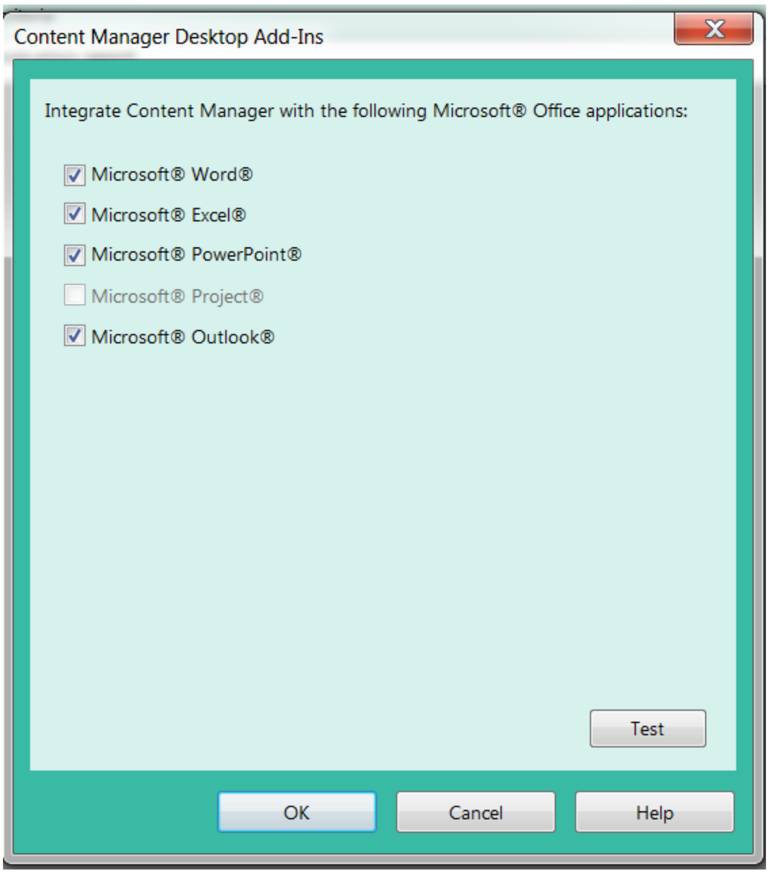
6. Your screen will reset to the City Parklands standard configuration. You can always make changes to your screen to suit the way you work, once you are more used to TRIM / CM. See **Sections 4.6** to **4.7** for more on customising TRIM / CM.
7. You should now be able to see the CPS ribbon:



4.5 Desktop Add-Ins

The Desktop Add-Ins control integration with the MS Office suite, allowing you to save into TRIM / CM. The first time you open the application, you should check that your Add-Ins are configured.

1. From the **CPS** ribbon, click the **Desktop Add-Ins** button. The **Content Manager Desktop Add-Ins** screen will appear.



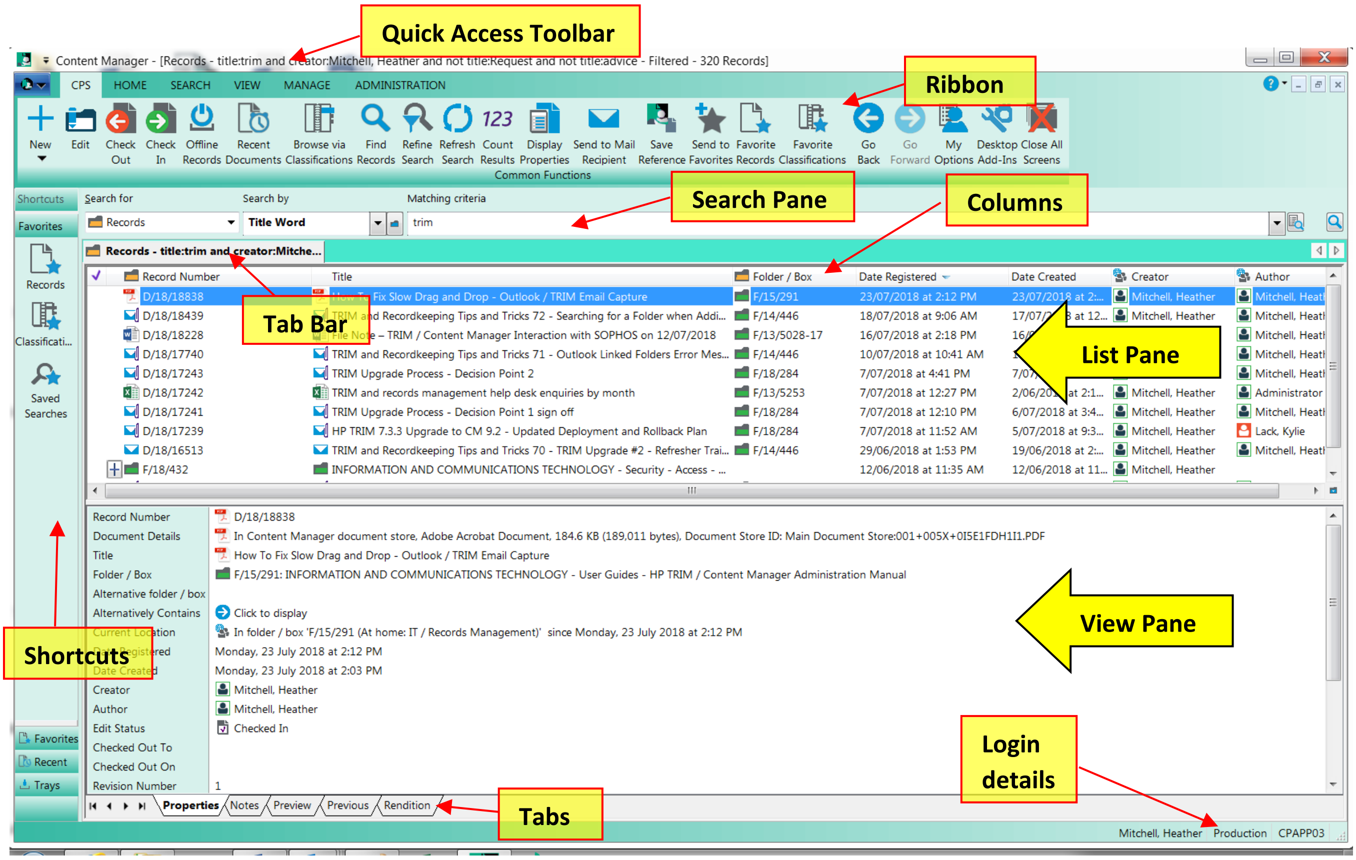
2. Tick all of the boxes (if you don't have Microsoft Project installed on your PC, this option will be greyed out) and click **OK**. TRIM / CM will now be integrated with Microsoft Office, allowing you to capture emails and other documents.

4.6 Navigating TRIM / CM

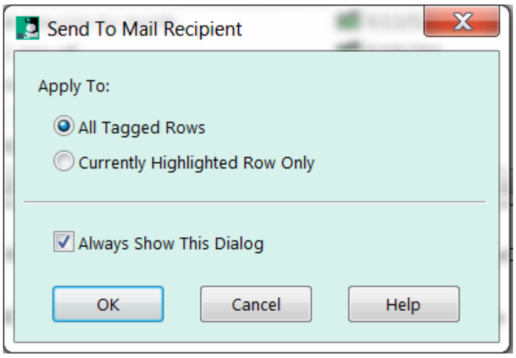
TRIM / CM has a similar layout to other Windows-based applications, in terms of using ribbons, drop-down menus and right-click functionality.

The TRIM / CM main window is divided into several sections:

- **Quick Access Toolbar** – where you can add buttons to quickly access functions you commonly use
- **Ribbon** – Provides access to TRIM / CM commands and includes the **CPS tab** for functions that City Parklands users commonly use.
- **Search Pane** - Performs simple searches using a single search criterion.
- **Tab Bar** - Click each tab to navigate your open windows.
- **List Pane** – Displays records that are relevant to the TRIM / CM window that is open. When TRIM / CM first opens, it will display your Recent Documents.
- **Columns** – Displays the names of the fields being shown for each record. The columns can be customised to show other fields as well.
- **View Pane** – Displays metadata associated with the record you have selected in the List Pane.
- **Shortcuts** – contains Favourites, Recent Documents and Containers and Trays.
- **Tabs** – Allows you to look at the record Properties, any notes that may be on the record and to preview and view renditions (thumbnails) of your records without opening them.
- **Login details** – Your user name, the Dataset and server name.

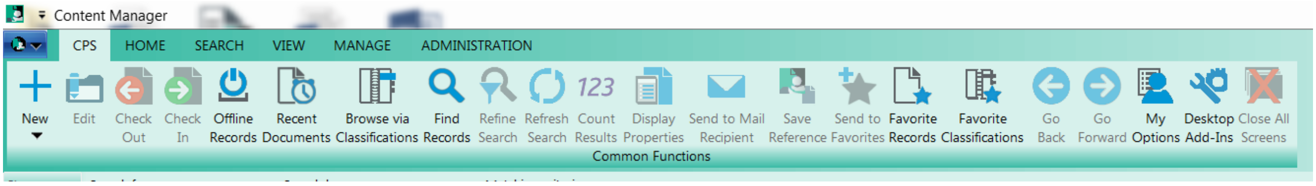


The table below describes some features that can be used to navigate the TRIM / CM main window:

Feature	Methods
Expand File	Click the ⊞ button to expand contents
Collapse File	Click the ⊟ button to collapse contents
Tag & Task	Tag to select objects before performing a task in TRIM / CM. •  Click the tag column next to the item you wish to select • **CTRL A** to tag all, **CTRL U** to untag • Right click the mouse to Tag All, Untag All or Invert Tags • To tag a small selection of consecutive items, tag your first item, then hold down the **Shift** key and tag the last item. When tagging multiple objects in TRIM / CM, you will be prompted to confirm that the next action applies to all tagged rows e.g.: 
Copy & Paste	Details like the Record Number can be copied from the View Pane using menu or keyboard shortcuts (e.g. **CTRL+C** to copy, **CTRL+V** to paste into Excel)
Accessing Functions	To perform an action on a record: • From the **Ribbon**, click the relevant button or • Right click the record and select from the menu; or • Highlight the record and use keyboard shortcuts where applicable.
Tabs	•
Hover the mouse	Slowly moving the mouse pointer over a button on the Ribbon Toolbar will show the label (and some keyboard shortcuts) representing the function. If a Record's title is too long to display fully in the List Pane, hovering the mouse will display the full title.
Count	• The Quick Access Toolbar will display the total number of search results in the List Pane; or • Click the **Count** () button; or • Right click anywhere in the List Pane and select **Search > Count**.

4.6.1 The Ribbon

The Ribbon is divided into different functions; however, the **CPS Ribbon** contains buttons for all of the every-day functions that an average user needs to access:

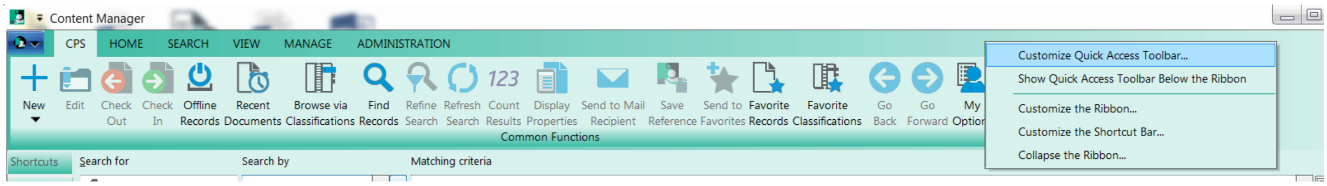


- **New** – Create a new Record or other object.
- **Edit** – Checks out and opens an electronic document for editing.
- **Check Out** – Checks out an electronic document to your Offline Records folder or other specified drive.
- **Check In** – Checks an electronic document back in.
- **Offline Records** – A private folder which holds documents you are currently editing.
- **Recent Documents** – A list of the last 25 electronic documents you have edited and updated.
- **Browse via Classifications** – Provides access to the Business Classification Scheme (BCS) where all records are stored.
- **Find Records** – Displays the full Search for Records window.
- **Refine Search** – Allows you to change or add search methods to the search you just ran.
- **Refresh Search** – Reloads the search results.
- **Count Results** – Counts the number of objects displayed in the List Pane.
- **Display Properties** - Opens the Properties screen for the selected record
- **Send to Mail Recipient** – Send a link to a record via email to another user.
- **Save Reference** – Saves a link to a record to a designated local drive e.g. for use on the Intranet.
- **Send to Favorites** – Saves a shortcut to the record or object in your Favorites folder for quick access.
- **Favorite Classifications** - Saves a shortcut to a particular part of the BCS in your Favorites folder for quick access.
- **Go Back / Go Forward** - Click the button to cycle backwards or forwards through the windows you have opened. (Note: this only works with some functions).
- **My Options** – Allows you to customise some TRIM / CM behaviours e.g. search preferences, changing the appearance of the screens, etc.
- **Desktop Add-Ins** – Integration with the Microsoft Office suite.
- **Close All Screens** - Closes all open Windows.

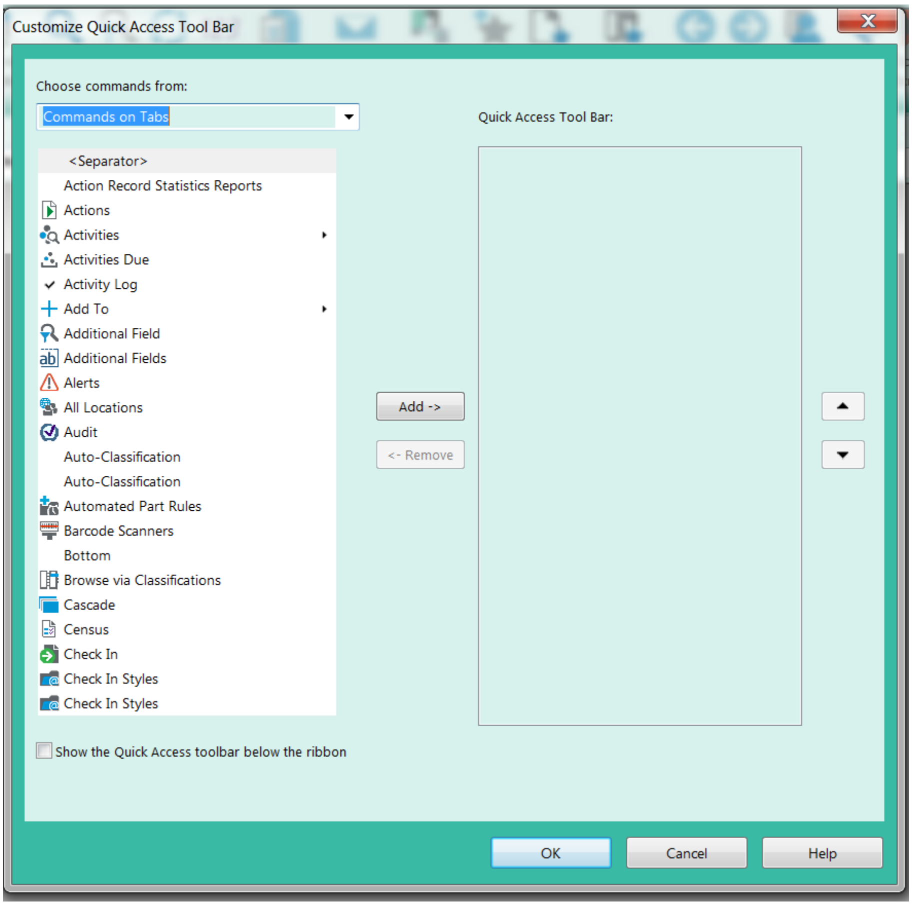
4.6.2 The Quick Access Toolbar

While the **CPS Ribbon** contains most of the functions you'll regularly access, if you find that you use other functions as well, you can add buttons to your Quick Access Toolbar as shortcuts. In the example below, we'll be adding an "**Alerts**" button to the toolbar:

1. Right click anywhere on the **Ribbon**. TRIM / CM will display some customisation options.

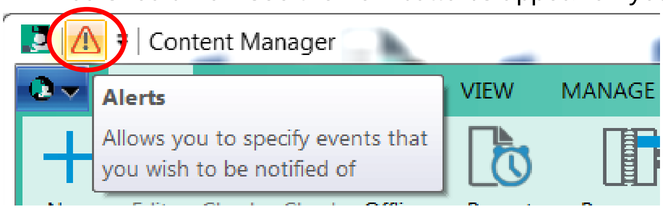


2. Select **Customize Quick Access Toolbar**. The following screen will be displayed:



3. In this instance, click on **Alerts** in the left hand column and click the **Add** button to add it to the right hand column. If you are selecting a number of commands, you can scroll up and down and continue to add them to Quick Access Tool Bar column. Use the up and down arrows on the right to position the commands in the order you wish them to appear. Click **OK** to finish.

4. You should now see the new button/s appear on your Quick Access Toolbar.



5. To remove a button, follow Steps 1 and 2. Highlight the command you wish to remove in the Quick Access Tool Bar column and click the **Remove** button. Repeat this if you are removing multiple buttons and click **OK** to finish. The button will be removed from your Quick Access Toolbar.

4.6.3 The List Pane

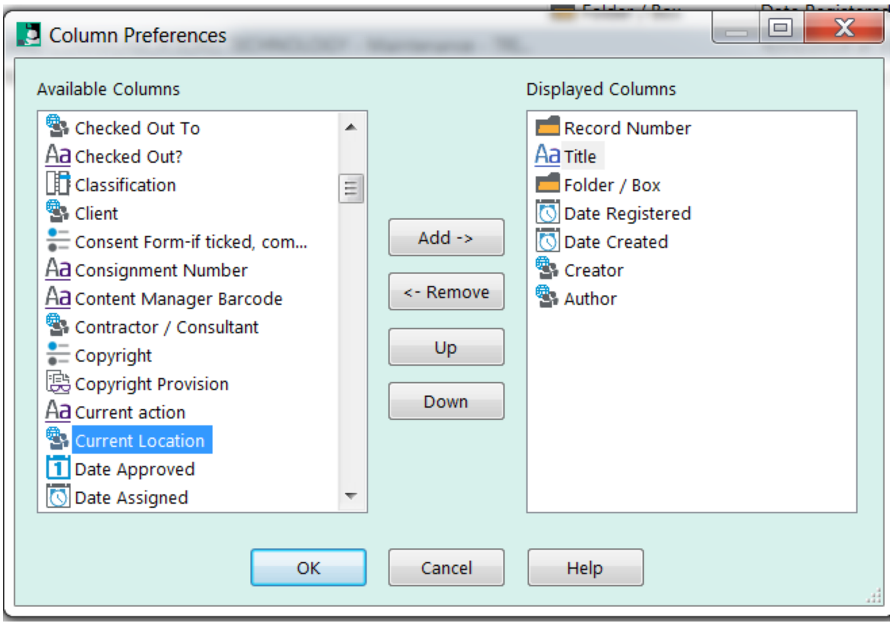
The List Pane displays search results, contents of folders, etc. and is set to display the following columns when viewing lists of records:

- Record Number – The unique number assigned to each record.
- Title – The name of the record.
- Folder / Box – The folder or archive box the record is located within.
- Date Registered – The date the record was saved into TRIM / CM.
- Date Created – The date the record was created in its native application.
- Creator – the person who captured the record into TRIM / CM.
- Author - the person who originally created the record in its native application.

You can add additional columns if you need to see extra information about the record.

1. Right click somewhere on the column headings and select **Format Columns**. The **Column Preferences** screen will be displayed.

2. To add a new column, highlight the one you want to display from the list in **Available Columns** and click the **Add** button. To remove a column from the **Displayed Columns** list, highlight it and click the **Remove** button. Use the **Up** and **Down** buttons to position the columns in the order you want them. Click **OK** when finished.



3. You can also change the order of column headings while in the List Pane by hovering the mouse, holding down the left mouse button and dragging the heading either left or right to reposition it.

4. Clicking on column headings allows you to change the order in which your search results are sorted; or you can right click on the heading and choose **Sort Ascending** or **Sort Descending**.

5. To resize columns, drag the border between two columns to the left or right.

4.6.4 The View Pane

The View Pane has been configured to display a standard set of fields related to the properties of the selected record; however you can customise it to display the metadata fields most relevant to you:

1. Right click anywhere in the View Pane and select **Customise**.
2. Adding, removing and changing the display order of the fields operates exactly the same as for List Pane columns in **Section 4.7** above.
3. You can also change the order of fields while in the View Pane by highlighting the required field, holding down the left mouse button and dragging the field either up or down to reposition it.

4.6.5 Tabs

The Tabs allow you to quickly view other information about the record in the View Pane:

- **Properties** - Details information about the item highlighted in the List Pane.
- **Notes** - Enables you to view any Notes attached to the record.
- **Preview** - Enables you to preview the item highlighted in the above List Pane via a viewer.
- **Previous** - Previews the preceding revision of the document via a viewer.
- **Rendition** – Displays a thumbnail of the record if it's an image.

4.6.6 The Shortcuts Pane

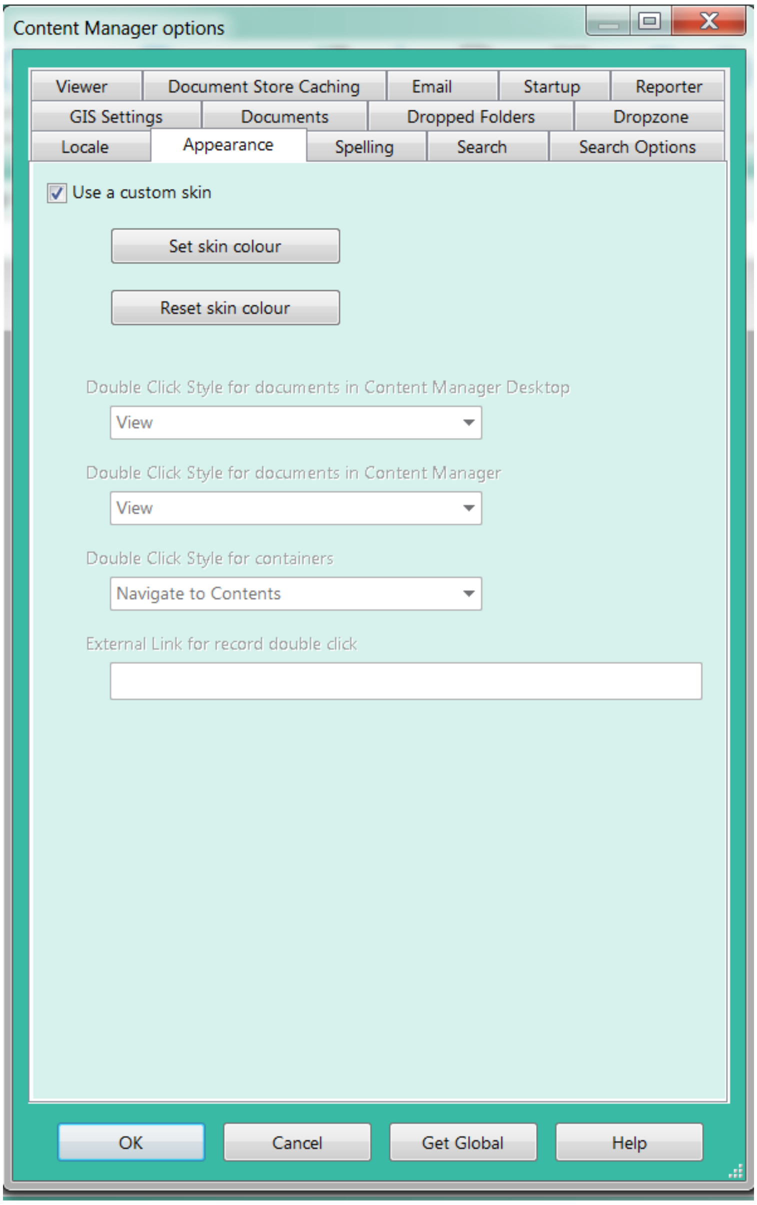
The Shortcuts Pane provides some useful functions to help you work with records in TRIM / CM and includes:

Feature	Methods
Favorites	Similar to Favourites in Internet Explorer, this area of TRIM / CM provides shortcuts to items that you want to work with regularly.
Records	Contains folders, boxes, documents and other records that you need to access regularly. To see your list of Favourite Records, click the **Records** button in the Shortcuts Menu. To deliberately add records to this area, tag a record, right click and select **Send To > Favorites** or click the **Send to Favorites** button on your Ribbon.
Classifications	You can store a frequently referenced Classification term for quick access, rather than having to navigate the entire Classification Scheme.
Saved Searches	Searches you conduct regularly can be saved here and rerun when needed.
Recent	TRIM / CM automatically adds recent items into this area
My Folders and Boxes	Displays the last 25 containers you used in TRIM / CM i.e. the most recent Folders and / or Boxes you saved records to. To deliberately add containers to this area, tag a Folder or other type of container and select **Send To > Add to My Containers**
Recent Documents	Displays the last 25 documents you created, edited or modified the properties of. To deliberately add documents to this area, tag a record, right click and select **Send To > Favorites** or click the **Send to Favorites** button on your Ribbon.
Trays	Contains and organises records you wish to work on.
Offline Records	Contains records that you have Checked Out for editing to your Offline records folder on your PC.
Documents Checked Out	Contains records that you have Checked Out to both Offline Records and local drives.
Check In Styles	Contains the Check In Styles you have created to automate capture of records from Outlook to specific folders in TRIM / CM.
User Labels	User Labels is a function which allows you to create shortcuts to records and group them in a way that is meaningful to you.

4.7 Changing the Colour Scheme

When you download the global settings, TRIM / CM sets a default colour. If you'd like to change the colour:

1. Click the **My Options** button on the Ribbon, then click the **Appearance** tab.



2. Ensure the **Use a custom skin** option is ticked.
3. Click the **Set skin colour** button. Click on the Colour Picker to select your new colour and click **OK** to finish. The TRIM / CM screen colour will change to your selection.

4.8 Record Types

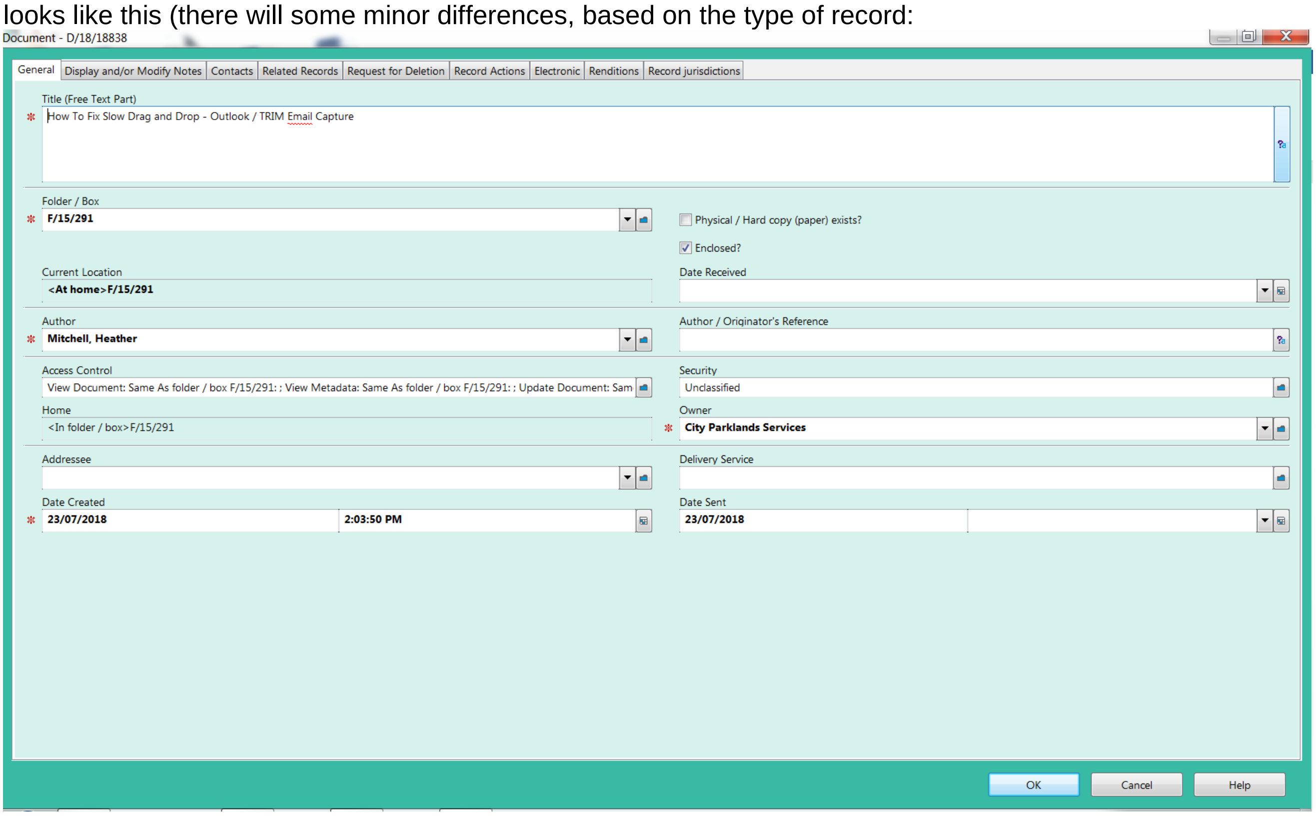
Record Types are a way to group similar items together. A Record Type is visually distinguished by its icon (shape and colour). It also differs by its numbering pattern, its access requirements and the metadata collected for the records it represents. Record Types have a hierarchical structure to allow certain Record Types to be attached within another, e.g. a document is contained in a folder; a folder is contained in a box. The following record types exist in TRIM / CM:

Record Type	Description
Documents	Any digital or hard copy document including emails, faxes, letters, PowerPoint presentations, spreadsheets, memos, PDF versions of documents, etc. Excludes images, multimedia, drawings or reference documentation. For electronic documents, TRIM / CM will also display the icon of the application the document was created in e.g. Word, Excel, Outlook, Adobe, etc. • All Documents must be contained within a Folder. • Numbering format: D/YY/NNNNNN e.g. D/19/1234
Images	All digital or hard copy images and photos. All Images must be contained within a Folder or an Image Folder. • All Images must be contained within a Folder. • Numbering format: I/YY/NNNNNN e.g. I/19/1234
Drawings	All drawings, plans, diagrams, designs and schematics, etc. A drop down selection of Drawing types, e.g. Architectural, exists on this record type. • All Drawings must be contained within a Folder. • Numbering format: DR/YY/NNNNNN e.g. DR/19/1234
Multimedia	All items that are in a multimedia format, e.g. mp3, mp4, avi, wmv, etc. A drop down selection of Format types, e.g. Audio, Digital, etc., exists on this record type. • All multimedia items must be contained within a Folder. • Numbering format: MM/YY/NNNNNN e.g. MM/19/1234
Reference Documents	Used for registering library items, reference material and external publications and reports. The document can be electronic or hard copy. • All Reference Documents must be contained within a Folder. • Numbering format: RD/YY/NNNNNN e.g. RD/19/1234
City Parklands Services Folder	Contains records that may be digital and/or physical, but limited to Documents, Images, Drawings, Multimedia objects and reference documents. Folders automatically close after 200 documents have been attached to them, and you will be unable to add any more documents to the closed Folder. A new part is created using the same number e.g. F/19/1234-2 and renumbers the first part e.g. F/19/1234-1. • Physical Folders can be placed in Archive Boxes for inactive storage • Numbering format: F/YY/NNNNNN e.g. F/19/1234
Image Folder	Contains Images and photographs in digital and / or physical format. Image Folders automatically close after 200 documents have been attached to them, and you will be unable to add any more documents to the closed Folder. A new part is created using the same number e.g. IM/19/1234-2 and renumbers the first part e.g. IM/19/1234-1. • Physical Image Folders can be placed in Archive Boxes for inactive storage • Numbering format: IM/YY/NNNNNN e.g. IM/19/1234

Legacy Folder	Contains records imported from the South Bank Corporation TRIM database. No new records should be placed on Legacy Folders, as they exist purely for reference. • Numbering format: F/YY/NNNNNN e.g. F/09/1234
Box	Were used for short term storage of active records. This practice is now discontinued. Numbering format: RB/YY/NNNNNN e.g. RB/19/1234
Archive Box	Used for storage of inactive records until such time as they can be legally disposed of. Numbering format: ABYY/NNNNNN e.g. AB19/1234

4.9 Properties

All objects in TRIM / CM – Records, Locations, Classifications, etc. - have Properties i.e. metadata. These are similar to Properties in other Windows-based software. For Records, the Properties screen looks like this (there will some minor differences, based on the type of record:



- **General** tab – Used to record information such as the title, date created, author, current location, access controls and security level.
- **Display and / or Modify Notes** tab – Used to record any additional information about the record that doesn't belong in the Title.
- **Request for Deletion** tab – Used to flag the record for deletion. The system administrator will run regular reports and remove the record.
- **Related Records** tab – Used to relate the record to other documents or folders
- The Properties window is displayed when creating a record and can be viewed at any time.

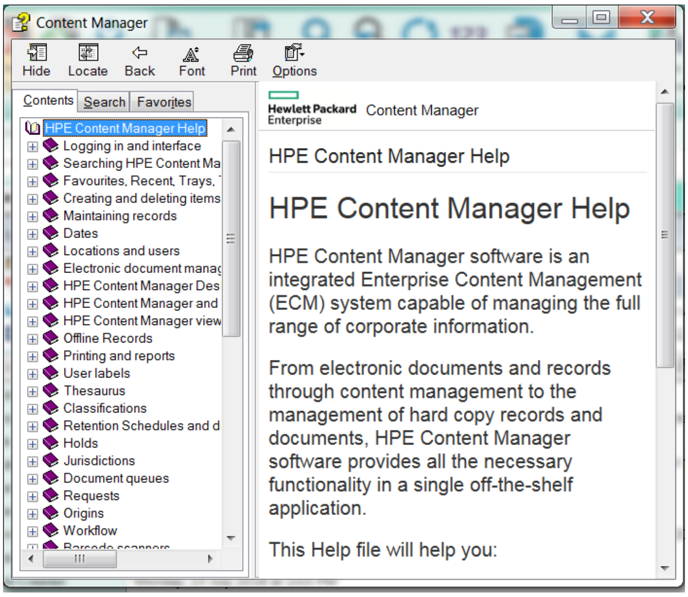
The Properties window is displayed when creating a record and can be viewed at any time.

1. To view the Properties of any object, highlight, right click and select **Properties** OR highlight and click the **Display Properties** button on the Ribbon.
2. The Properties window will open, as in the example below. Click **OK** if you make changes to the **Properties** e.g. to amend the Title of a record or **Cancel** to exit without saving changes.

4.10 TRIM / CM Help

TRIM / CM features comprehensive help files.

1. To access on-line help, type **F1.** TRIM / CM will display the Help dialogue box. You can search for help via the **Contents** tab, or type in a word or phrase via the **Search** tab.



2. The Help function is context-sensitive, so if you're in the process of carrying out a particular function, the help information displayed will be related to that function.

5. Searching

TRIM / CM allows you to search using various methods. All records, locations and other objects created and managed in the system have metadata (Properties) associated with them. You can use many different metadata elements to locate records. E.g. Title, Date Created, Creator, Owner, etc.

By using multiple search criteria, selecting appropriate search operators (AND, OR), and filtering, TRIM / CM can produce refined, specific results making it easy to locate information each time it is required. Always try to construct your searches to include as much information as you can or your search will be too broad.

Frequently performed searches can be saved and used again using the Saved Search function.

TRIM / CM searches are not case sensitive.

5.1 Search Limitations

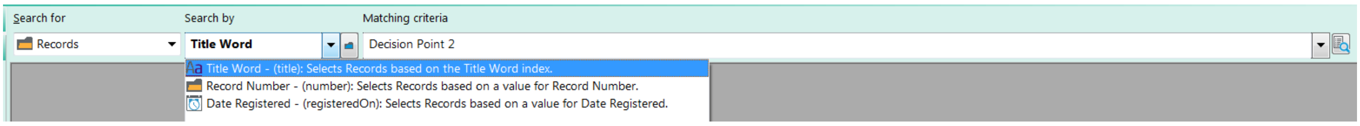
Due to the sensitive nature of their content, some records have more stringent security controls applied to them. Be aware that any search you perform will only return records your security profile permits you to see. Access Controls and security levels placed on sensitive material may prevent you from viewing some records or even their metadata.   See **Section 9** for more details on Access Controls and other security measures.

5.2 Performing a Quick Search Using the Search Pane

The **Search pane** (located near the top of your screen) is ideal for quick searches using a single criterion e.g. Record Number, Title Words, Date Registered, Creator, etc.

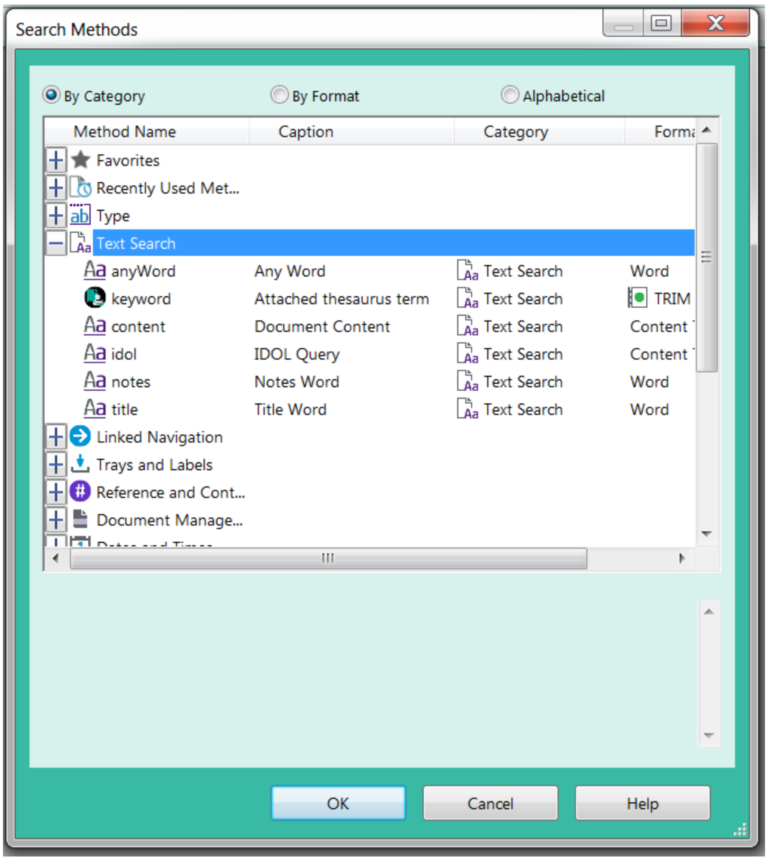
The **Search Pane** is split into three parts:

- The **Search for** field – this defaults to **Records**; however you can search for other objects such as Locations, Classifications, Alerts, etc. as well.
- The **Search by** field – this is where you select what Properties you would like to search by. As a default, you will have access to **Title Word**, **Record Number** and **Date Registered** under the drop down arrow; however you can add other **Search by** methods.
- The **Matching Criteria** field – this is where you type your search terms e.g. words used in the Title, Creator's name, dates, etc. TRIM / CM will remember **Matching Criteria** terms you commonly search by and store them under the drop down arrow.



To run a simple search for records:

1. Click on the drop down arrow in the **Search By** field to select a default or previously used search method (TRIM / CM will remember the last 10 search methods you used).
2. If you'd like to use a new Search Method, click the blue **Kwikselect** button to view all available options. The Search Methods dialogue box will be displayed. Select a Search Method by clicking the plus sign beside the relevant Category and expanding it. Highlight your option and click **OK**. (See Section **5.3** for more information on common Search Methods.)



3. Type the search terms in the **Matching Criteria** field. Press **Enter** or click the magnifying glass icon  at the end of the field to run the search. TRIM / CM will display the search results in the List Pane e.g.

4. TRIM / CM displays the Record Type icon or, for electronic documents, the native application icon to help you quickly identify the format of each record.

5. To view a document, double click it or highlight the document, right click and select **View** to open it in read-only mode. You can also click the **Preview** tab at the bottom of the **View Pane** to see a simplified view. **Note:** Double clicking on a Folder will open a new window to display its contents.

5.3 Understanding Search Methods

The table below lists the more commonly-used search methods:

Text Search

Search Method	When Would It Be Used?
Any Word	To search for the word(s) in both the Title and/or Notes fields. An asterisk * may be used for wildcard searching (e.g. archive* will return all records with titles containing the words “archive”, “archives”, “archival”, “archivist”, etc.).
Document Content	To search within the text of documents. Best used when you know a phrase or fairly unique words that appear in a document. Use double quotation marks (“) around the word or phrase (*e.g. “regional flavours”)*
Notes Word	To search for any word that appears in the Notes attached to a record. If you enter more than one word, TRIM / CM will search for both words separately in the field. An asterisk * may be used for wildcard searching.
Title Word	To search for any word that appears in a record's title. If you enter more than one word, TRIM / CM will search for both words separately in the title. An asterisk * may be used for wildcard searching.

Linked Navigation

Search Method	When Would It Be Used?
All Parts Of	To search for all parts of a particular Folder. You must enter the Folder number in full *(e.g. F/13/139)*
Container (Including Alternate)	When you know that a particular record is contained (or alternatively related) within a specific Folder or Box. You must enter the Folder or Box number in full *e.g. F/13/139, F/13/5028-17*, etc.

Reference and Control Numbers

Search Method	When Would It Be Used?
Classification	When you know where in the Business Classification Scheme the record is located. Note: this will only display the Classification structure, not the folders or documents underneath.
Record Number	When you know the number of the record you wish to view. You must enter the record number in full *(e.g. D/14/1234; F/13/139)*

Document Management

Search Method	When Would It Be Used?
Checked Out To	To search for all documents checked out to a specific person. You can type **me** to search for all documents currently checked out to you or click the **More Options** button  and search for the name of the required person.

Dates and Times

Search Method	When Would It Be Used?
Date Registered	When you know the date (or approximate date range) that the record was first put into TRIM / CM.

Date Created	When you know the date (or approximate date range) that the record was physically or electronically created in its native application e.g. Word, Excel, Outlook, etc.
Date Last Updated	When you want to know what documents were updated on a particular date or date range. Updates can include editing as well as changing elements of the record's Properties.

Contacts, People and Places

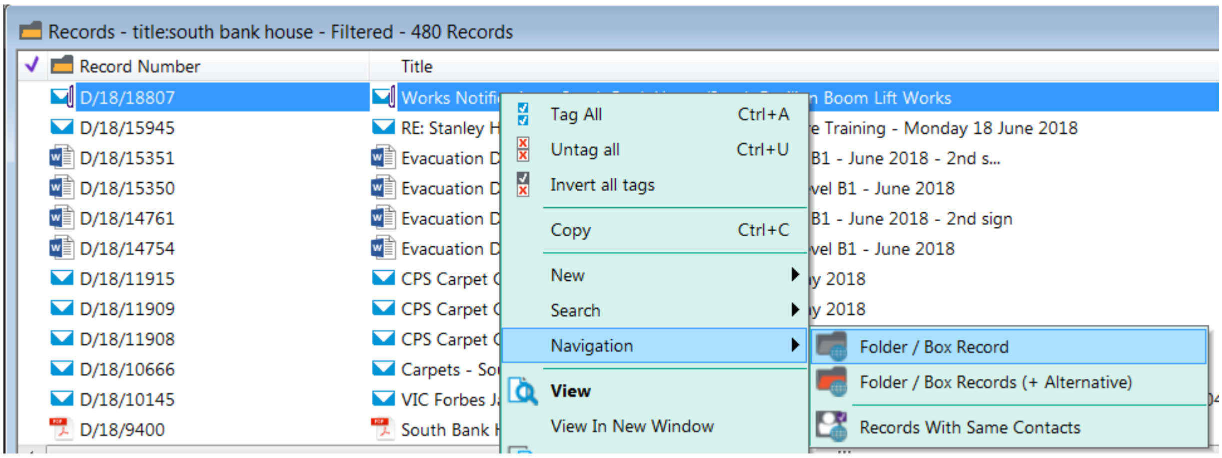
Search Method	When Would It Be Used?
Author	To search for records based on the person or organisation who authored them. This can be different from the Creator for internally-created records, and is basically always the case for records created external to CPS.
Creator	To search for records based on the Person who put them in TRIM / CM.
Current Location	To search for records by their current Location. Can be a Person or a Position.
Owner	To search for records based on their Owner (i.e. the particular Location that is responsible for the record). Ideally, this should be a business unit, rather than a Person or Position.

5.4 Navigating the Record Structure

You might find a document in your search that is similar to what you are looking for, but not an exact match. Navigating to the document's Folder can help you find similar records and additional documents in TRIM / CM.

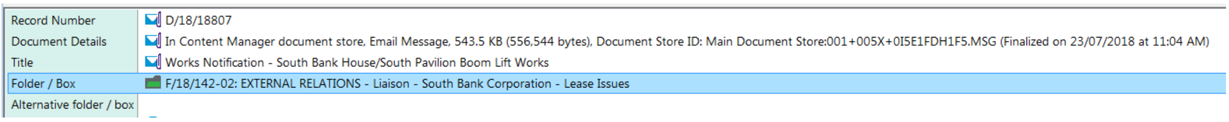
To navigate from a record to its container:

1. Highlight the record and right-click **Navigation > Folder / Box Record**.



OR

Double-click on the **Folder / Box** field in the **View Pane**.



2. Click on the plus sign to the left of the Folder to expand and view its contents.

Exercise 2

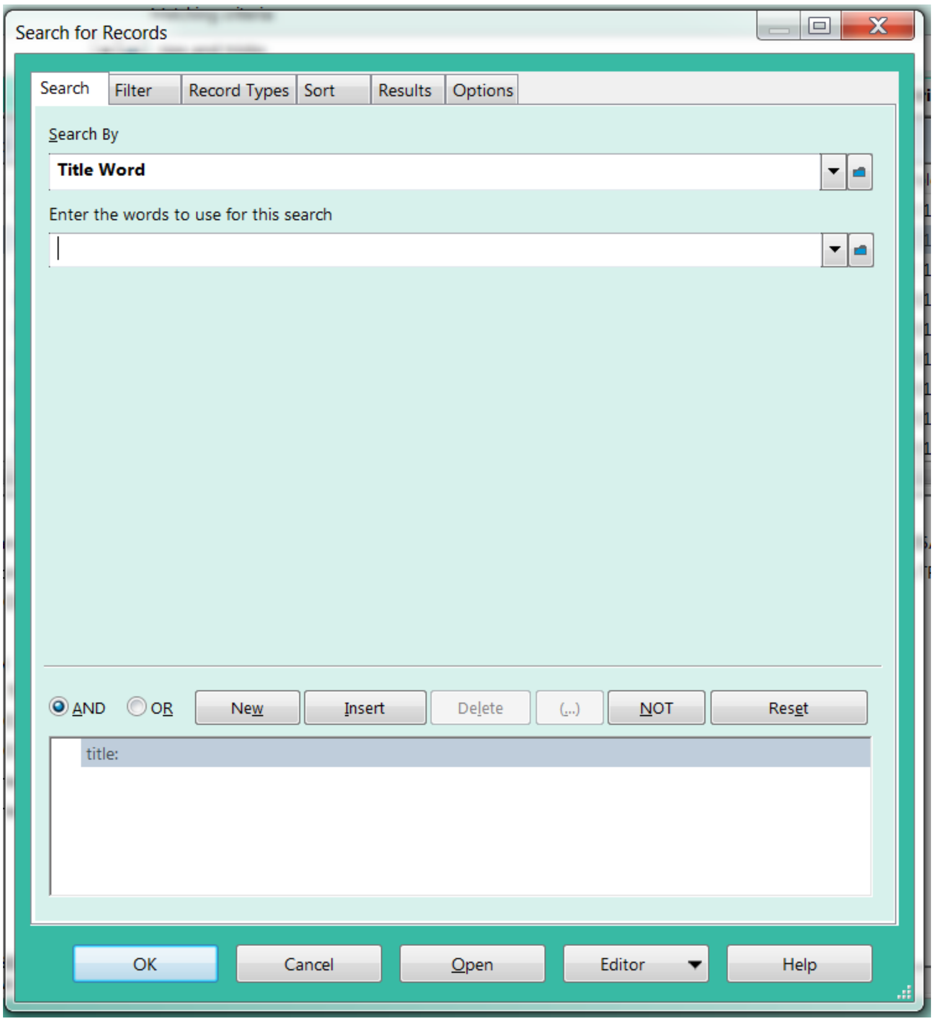
1. Using the Search Pane, search by **Record Number** to locate **D/18/17**. What is the title of the document? ____

2. Navigate to the document's Folder. What is the number of the Folder this document has been placed in? **F/14/**_____

5.5 Using the Search for Records Screen

You can use the Search for Records as an alternative to the **Search Pane**. It provides additional flexibility when constructing searches, including the ability to add additional criteria for a more targeted search.

1. To open a new search, click on the **Find Records** button on the Ribbon OR Press **Ctrl F** to bring up the **Search for Records** screen.



2. In the **Search By** field, either select a frequently used search method from the drop down list OR Click the **KwikSelect** to select from all available search methods. Enter the criteria (words, date, location etc.) in the **Enter the words to use for this search** field.

   You can make your search more effective by using the Tabs:

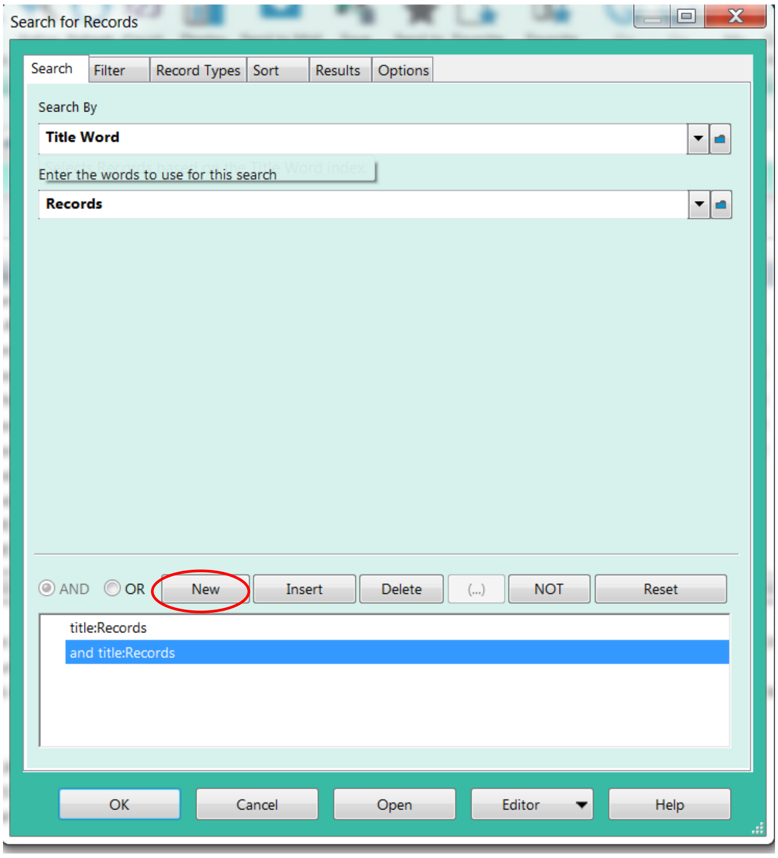
- **Filter** – Allows you to limit your search by record disposition or record class. You can also limit the search to records registered within a specified number of days and whether the documents can be edited (Unfinalized, Finalized). The most useful field is the **File Types** field. Here you can specify the electronic document application extension/s, so that the search returns only documents of that type e.g. docx, jpg, etc.
- **Record Types** – Allows to tag or untag specific record types to include or exclude them from your search.
- **Sort** – Allows you to specify a sort order for your search results. If you tick the **Save as default sort ordering**, your search results will always be displayed in the specified order, unless you untick the option.
- **Results** – Allows you to specify the columns you would like displayed for this particular search. Untick the **Use the default column setup for this Content Manager object** to customise the columns you'd like displayed.
- **Options** – Allows you to extend your search to include your position and other locations you belong to. Only applies when you are searching for records that have been assigned to your or your position.

3. Click **OK** to run the search.

5.6 Refining Your Search

If the results of a search are too large and / or you want to alter the parameters, you can refine the search to get a more accurate outcome.

1. With your search results displayed, click on the **Refine Search** button on the Ribbon OR Type **F7**. The **Search for Records** screen will be displayed, ready for you to add extra search methods.
2. Click the **New** button to add other criteria to your search. A new line will appear in the bottom field of the **Search for Records** screen.



3. Highlight the new line and use the drop down list or **KwikSelect** to choose your next search method and enter your criteria in the **Enter the words to use for this search** field.

- Using the **AND** button narrows your search.
- Using the **OR** button broadens your search.
- **Insert** and **Delete** adds or removes search methods.
- **(…)** groups sets of search methods by putting them in brackets. Bracketed methods will be processed first, and then any preceding and following methods will be processed
- **NOT** refines a search to include only records that meet the previous but not the current set of search methods. E.g. all records created on 01/09/2014 where Author is NOT Mitchell, Heather.
- **Reset** deletes all the search methods so you can start a fresh search.

4. Continue to add search methods using the **New** button until you're happy with the search parameters, then click **OK** to rerun the search.

Exercise 3

1. Using the **Search For Records** screen, do a **Title Word** search for records with **enchanted garden** in their title. Using the **Count** button how many records did you find?

   ____

2. Using the **Refine Search** button, add a new search method of **Date Created** with the date range of **01/01/2017** to **31/12/2017**. Run the search. How many results did you get this time?

   ____

5.7 Document Content Searching

Document content searching enables a user to search for text within the document itself rather than using the Title or other metadata.

If you know a unique phrase in the document you're searching for, you can use either the **Search Records pane** or **Search For Records** screen to quickly locate it.

It's always better to use a specific phrase or, at the very least, a number of words, when searching via Document Content, to ensure you make your search as specific as possible. Searching on a single word not only makes the search slower; it will potentially return thousands of irrelevant results (think of searching on the Internet).

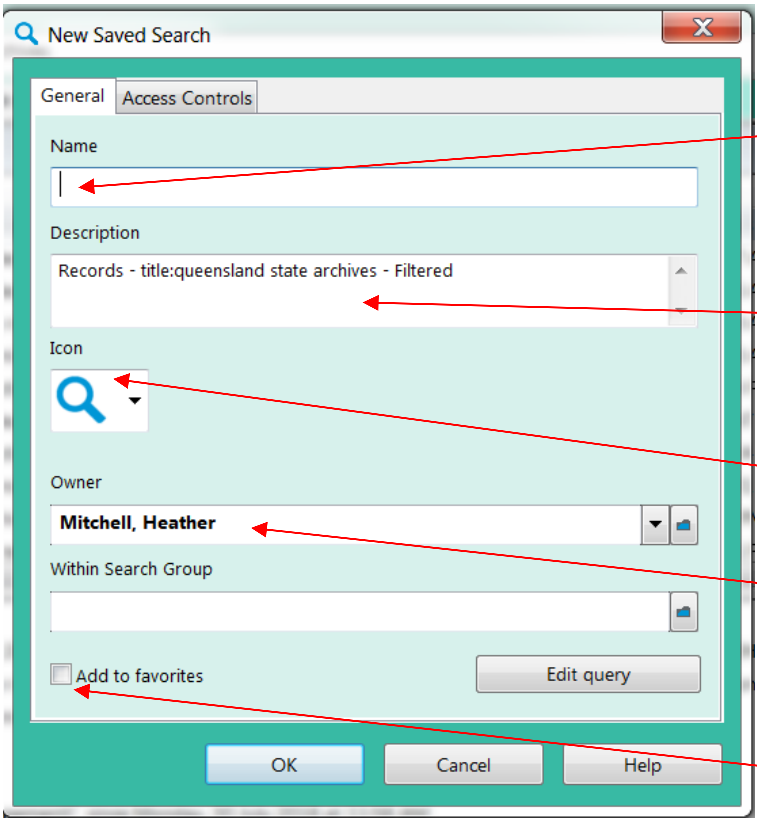
1. Select **Document Content** as your search method via the drop down or **KwikSelect** button. Enter the required phrase using double quotation marks (“) and run the search.

   You can also combine Document Content searching with other search methods to refine your results. This is particularly useful if you don't know a specific phrase, but do know some words in the text of the document. In this case, it's better add Author, Creator, Date Registered, Date Created, etc. to narrow the search, otherwise TRIM / CM will attempt to locate records whose text matches as many of the words in the **Search For** field as possible.

5.8 Saving Your Searches

If there is a particular search that you run frequently, saving it can give you instant access to it in the future. Saving a search is particularly useful if you need to report regularly on something.

1. Set up the required search and run it.
2. **Right-click** anywhere on your search results and select **Search > Save Search As**:
3. You will see the **New Saved Search** screen:



Enter a name for your search. Choose a name that will be easy to identify. A maximum of 30 characters can be used to name the Search. Each name must be unique

By default TRIM / CM inserts the search methods and value – these can be changed if required

You may choose a different icon if you wish.

TRIM / CM will automatically make you the Owner of the search.

Select the tick box to **add this Saved Search to your** Favourites Tray on your shortcut bar

If you leave yourself as the Owner, no other user will be able to see your search. Most TRIM / CM users don't have the security access to change this. Administrators have the ability to leave this field blank, allowing all users to see the search; alternatively, they can nominate a Group who can use the search.

The **Edit Query** button allows you to refine your search as detailed in **Section 5.6**.

The **Access Controls** tab allows you to further control who can use your saved search. TRIM / CM defaults the Access Controls to allow everyone to use the search; however, you can elect to share the search only with specific groups or positions by clicking the **Custom** button. For more on how Access Controls work, see **Section 5.7**. **Note:** If you leave yourself as the Owner, changing the Access Controls will have no effect – the saved search will be locked down as private to you.

4. Click **OK** to save the search. If you have ticked the **Add to Favorites** box, the search will be automatically sent to **Saved Searches** in your **Favorites** menu.

5. If you ever need to edit your saved search, you can highlight it, right click and select **Properties**. Use the **Edit Query** button to change your search parameters and click **OK** twice to save.

5.9 Accessing a Saved Search

To access a saved search that you have not sent to your **Favorites** (or to see all of the existing saved searches you have the necessary permissions to access), press **Ctrl G**. TRIM / CM will display all available searches:

If you locate a saved search that someone else has created that you think might be useful for you, highlight it, right click and select **Send To > Favorites**.

To view your personal saved searches, click **Favorites** on your **Shortcuts** bar, then click the **Saved Searches** button. TRIM / CM will display your saved searches. To run a saved search, simply double click on it.

5.10 Browsing for Records via Classification

Another way of locating records in TRIM / CM is to browse via the Business Classification Scheme (BCS). The BCS is a hierarchical list of terms that describe CPS's business functions and activities. It is used to title Folders, allowing records documenting similar activities to be grouped and kept together.

Having a BCS to categorise folders ensures that consistent terminology is used across the organisation, which helps with searching and retrieval of information.

The BCS structure has broad business functions at the top level, the business activities comprising each function at the next level, and the subject matter or transactions of the business at lower levels. **The BCS is not structured according to an organisational chart.**

FUNCTIONS are broad, encompassing functions performed by CPS

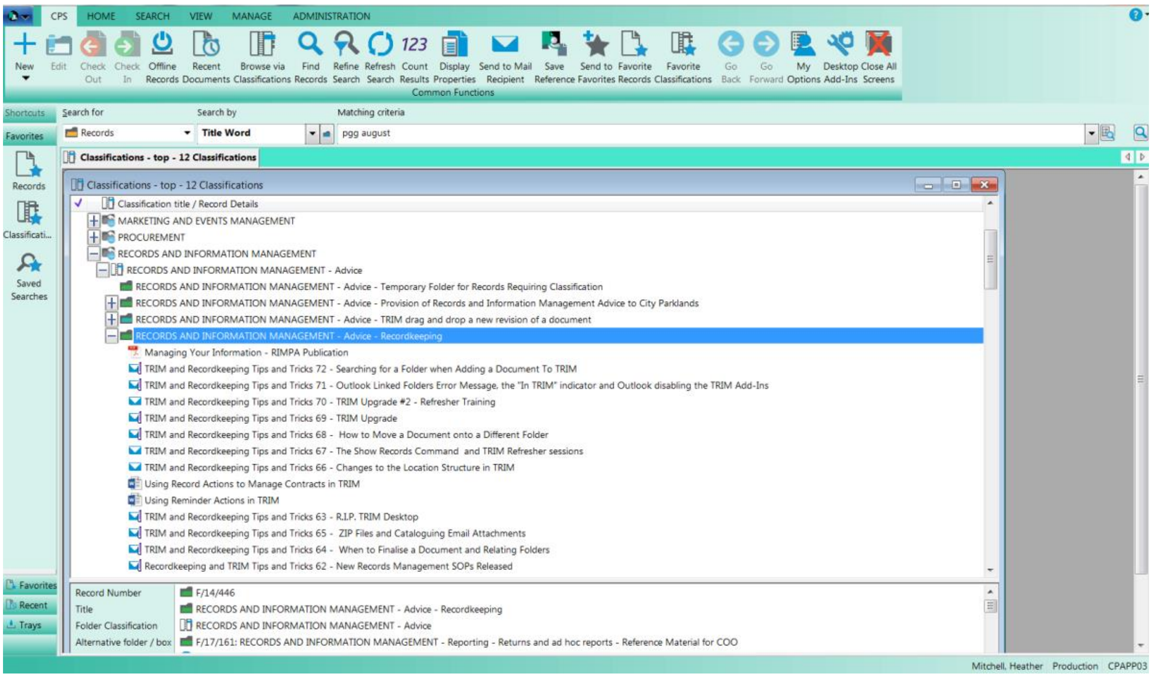
ACTIVITIES are the major tasks performed to support those functions

Transactions / Subjects are the typical matters/transactions associated with activities

Topic (free text Title)

To browse the BCS:

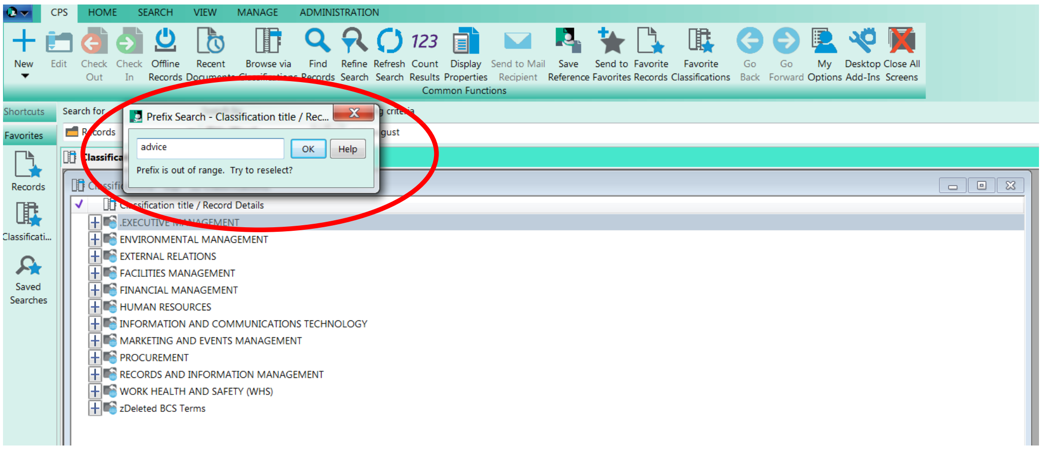
1. Click the **Browse via Classifications** button on the Ribbon. On the **Menu bar**, go to **Search>Browse Via Classifications** OR Press **CTRL F3**.
2. TRIM / CM will display the Classifications window. You can expand the hierarchy by clicking on the plus sign beside each term. The **View** pane will display some information about the classification terms. The **Notes** tab is particularly useful as it explains how the terms are to be used.
3. Individual records are displayed at the bottom of the hierarchy tree, as in the example below:



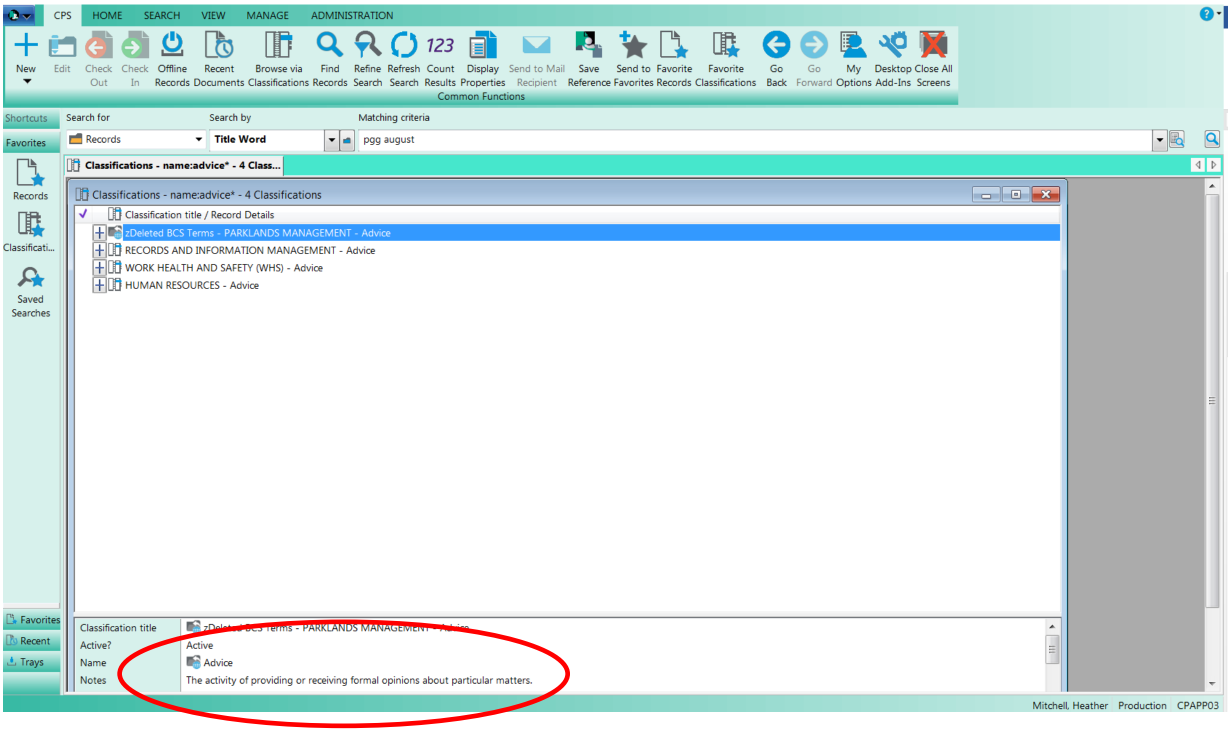
Folders are displayed in the order in which they were created. Some classification terms contain a large number of folders, so scanning through the list can become difficult. To access a more user friendly view of the folders:

- Highlight the classification term that contains the folders you wish to vew.
- Right click and select **Show Records** OR press **Ctrl R**.
- TRIM / CM will open a new window to display the folders. Click the **Title** column header to sort the folder names in ascending alphabetical order. Click again to change to descending order.

4. You can also search for specific classification terms. Click anywhere in the List Pane of the **Classifications** screen and simply start typing. TRIM / CM will open a Prefix Search dialogue:



5. Type your term in and click **OK.** TRIM / CM will display all instances of where the term appears in the classification hierarchy.



The **View Pane** will display notes about how the term is used.

Expand the structure to view records underneath.

5.11 Adding Items to Your Favorites

Anything that you locate in a search can be added to the relevant area of your Favorites for quick access in the future. Simply highlight and click the Send to **Favorites** button on the Ribbon OR right click, then select **Send To > Favorites** OR press **F4**.

To access your favourite records, click the **Favorite Records** button on the Ribbon OR click **Favorites** on your **Shortcuts** bar, then click the **Records** button.

You can also save relevant parts of the BCS to your **Favorites** so that you don't have to navigate the whole structure each time. Simply highlight the term that you want to save and click the **Send to Favorites** button on the Ribbon OR right click and select **Send To > Favorites** OR press **F4.**

To access your favourite Classifications, click the **Favorite Classifications** button on the Ribbon OR click **Favorites** on your **Shortcuts** bar, then click the **Classifications** button.

6. Saving Records into TRIM

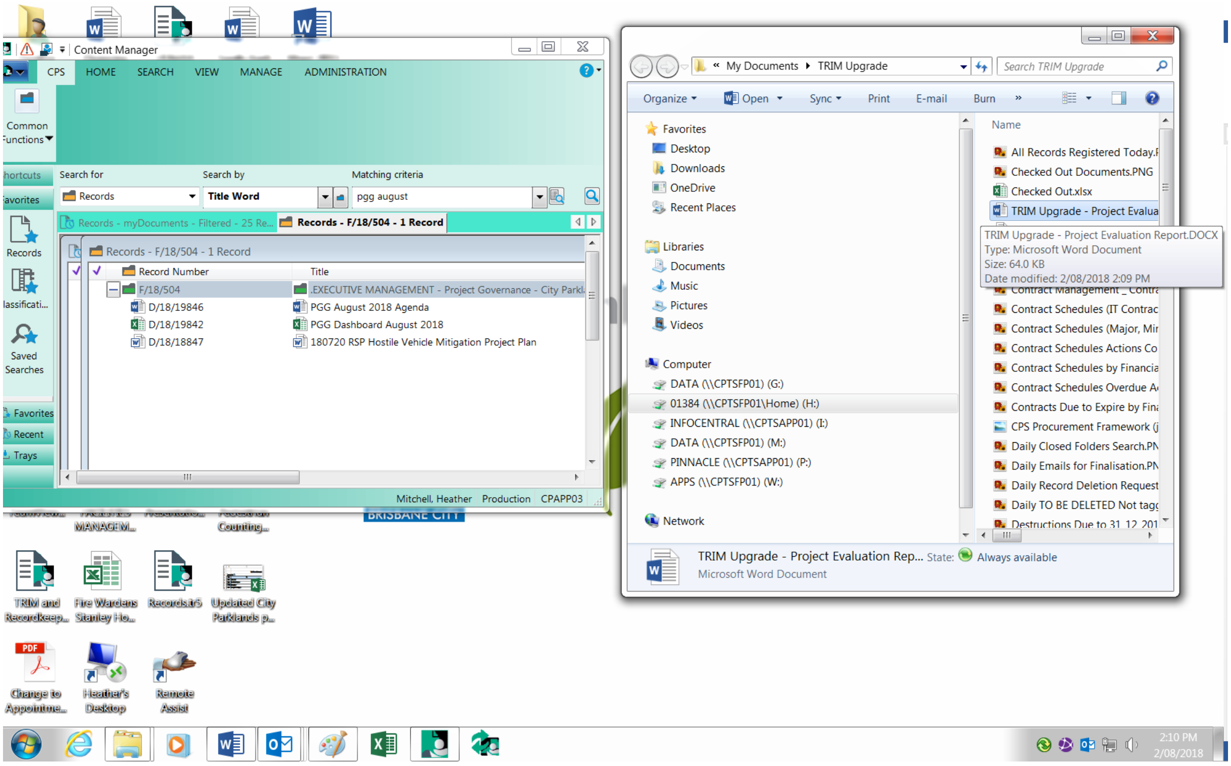
TRIM / CM is capable of managing records in a variety of electronic formats.

Any document can be dragged and dropped into the relevant Folder in TRIM / CM from Windows Explorer e.g. .jpgs, .pdfs, video and audio files, Word documents and Excel spreadsheets etc. In addition, Microsoft applications such as Word, Excel, PowerPoint, Microsoft Project and Outlook are integrated with TRIM / CM (**Desktop Add-Ins**) so that you can save documents directly into the system.

Generally, saving zip files into TRIM / CM is discouraged, as best practice recordkeeping requires that each record be registered individually to ensure that adequate details are captured. There are, however, some circumstances where this may not be feasible i.e. where it's imperative that links between documents are maintained and TRIM / CM isn't able to manage the links. In those instances, the contents of the .zip file must all deal with the same subject and have the same retention period. i.e. it's **NOT** acceptable to simply zip up the unrelated contents of an inbox or a network drive and save the zip file onto a Folder in TRIM / CM.

6.1 Drag and Drop into TRIM / CM

1. Open TRIM / CM and navigate to the Folder you want to place the document on.
2. Open Windows Explorer and navigate to the electronic document you want to capture. (If you have two computer screens, have Windows Explorer open on one and TRIM / CM open on the other. If you have one screen, resize both so that they're displayed side by side e.g.

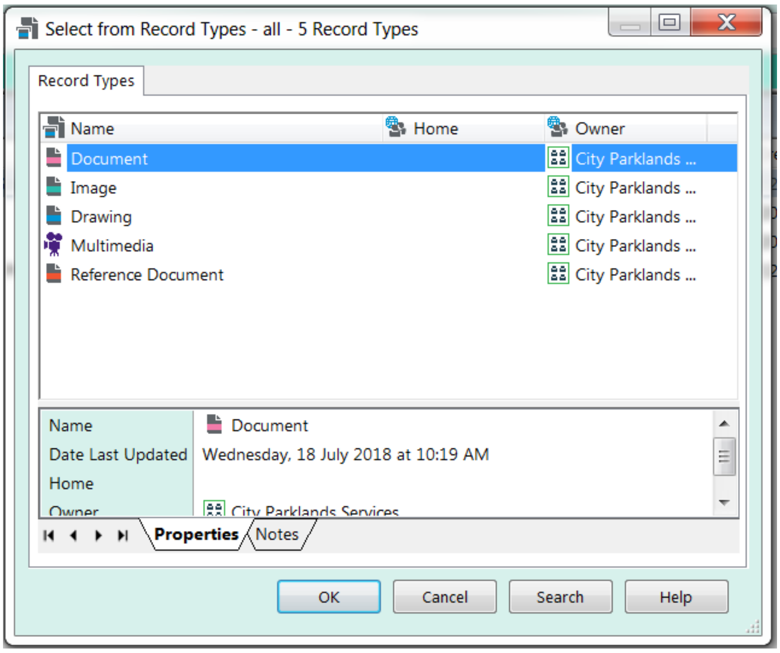


3. In Windows Explorer, **click and drag** the document over to the Folder in TRIM / CM, then release the mouse button to drop the document.

Warning: Don't drop the new document on top of an existing document in TRIM / CM. This will create a revision of the existing document, instead of registering your new document.

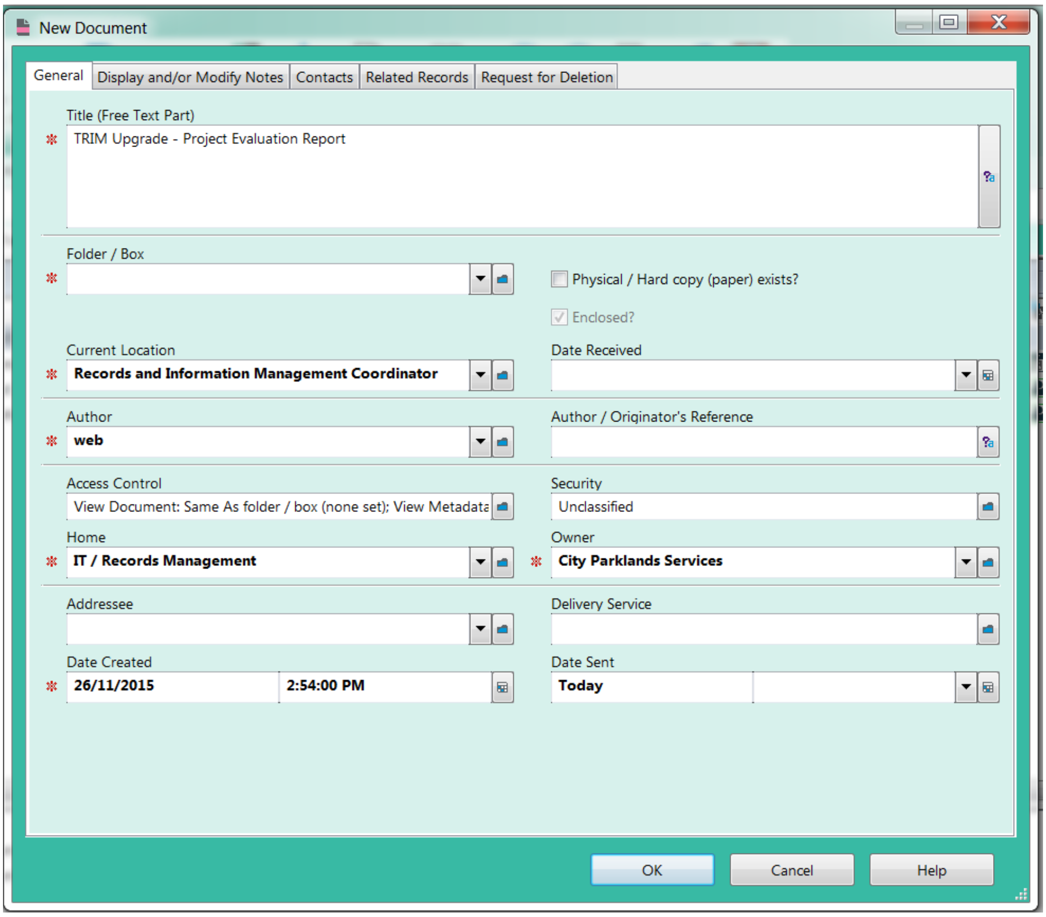
If you want to keep a copy of the document on your local drive after saving it into TRIM / CM, ensure that under **My Options > Documents**, the **Delete document after it has been processed** option is left unticked, otherwise the document will be deleted from Windows Explorer after saving.

4. TRIM / CM will display the **Select from Record Types** dialogue. (Refer to the list of Record Types in **Section 4.10**, if you're unsure which to choose.) In the example below, we're adding a **Document**.



5. Double click on **Document** OR highlight **Document** and click **OK**.

6. TRIM / CM will display the **New Document** Properties screen.



Field	Explanation
Title (Free Text Part)	A free text field to give the document a meaningful title, in line with CPS titling standards.
Folder / Box *	The Folder or Box that this record will be placed in. Use the drop down or **KwikSelect** to choose an appropriate Folder or Box. Alternatively, if you know the number, simply type the exact number in.
Physical / Hard copy (paper) exists?	This box should only be selected if there is a **physical original record**. Do not select this when saving an electronic document, unless it's a scanned copy of a signed physical record.
Current Location *	TRIM / CM will automatically default to the Folder or Box you've dragged the document onto.
Date Received	The date the document was received by the organisation. It's useful to complete this field for hard copy records.
Author *	The person, position or organisation who wrote the document. For electronic documents, TRIM / CM will attempt to assign an author based on the available metadata associated with the document e.g. for emails, TRIM / CM will try to populate this field with the author of the email. For Word, Excel and PDFs, TRIM / CM will use author information from the document's Properties. See **Section 7.1.1** below for how to create new external locations for use in the Author and other Location-based fields.
Author / Originator's Reference	Use this field to note any additional reference IDs or numbers on the document.
Access Control	TRIM / CM is configured to assign access controls to documents based on the Folder or Box they are being placed in. You can amend access controls on individual documents if required, and if you have the necessary permissions in TRIM / CM. See **Section 9** for more on Access Controls and Security.
Security *	Security levels are an additional way of restricting access to sensitive information. TRIM / CM defaults document security to "Unclassified". See **Section 9** for more on Access Controls and Security.
Home *	TRIM / CM will default the Home to the Folder or Box you entered in the **Folder / Box** field.
Owner *	TRIM / CM will default this to **City Parklands Services**.
Addressee	If you wish, enter the name of the person who received the record.
Delivery Service	Used to record what type of mail delivery service is used to send a document to an external party. This is a legacy field for physical records.
Date Created *	Refers to the date the document was created in its native application e.g. Word, Excel. TRIM / CM will default to today's date, unless it can find that information in the document's properties; however, you are able to change this by using the calendar drop down or simply typing the applicable date.
Date Sent	The date the document was sent to someone. TRIM / CM will default to today's date; however, for documents sent to an external party, you can change this by using the calendar drop down or simply typing the applicable date and time.

7. Complete the mandatory fields and click **OK** to save the record into TRIM /CM. **Note:** Ensure that you give the record a meaningful title i.e. a title that conveys broadly what the document is about, without requiring a user to view it to find out.

	If you're the author of a document and TRIM / CM doesn't automatically populate the **Author** field with your details, you can simply type "**me**" in the field. TRIM / CM will use your login to complete the field with your User name. If you need to add a different author, see Section 7.1.1 below for more information.

6.1.1 Creating New External Locations

Locations in TRIM / CM are used to maintain the integrity of records, by telling you who created them, authored them, were responsible for them and used them. The Locations database is similar to a directory that includes both internal and external individuals, positions, organisations, groups, committees and storage areas.

TRIM / CM structures these locations in a hierarchy:

Organisation (or Group) → **Position** → **Person**

Locations may be associated with a number of mandatory data entry fields, such as:

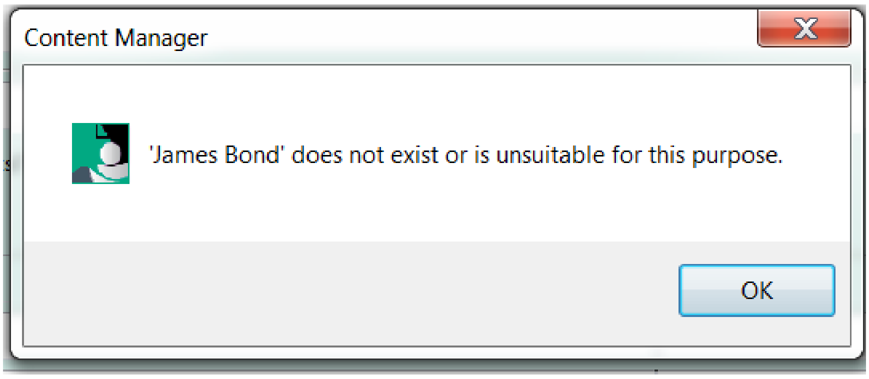
- **Author**
- **Assignee**
- **Contractor/Consultant**
- **Current Location**
- **Addressee**
- **Owner**
- **Photographer**
- **Home**

Locations can also be useful when finding records e.g. searching by Author or Creator.

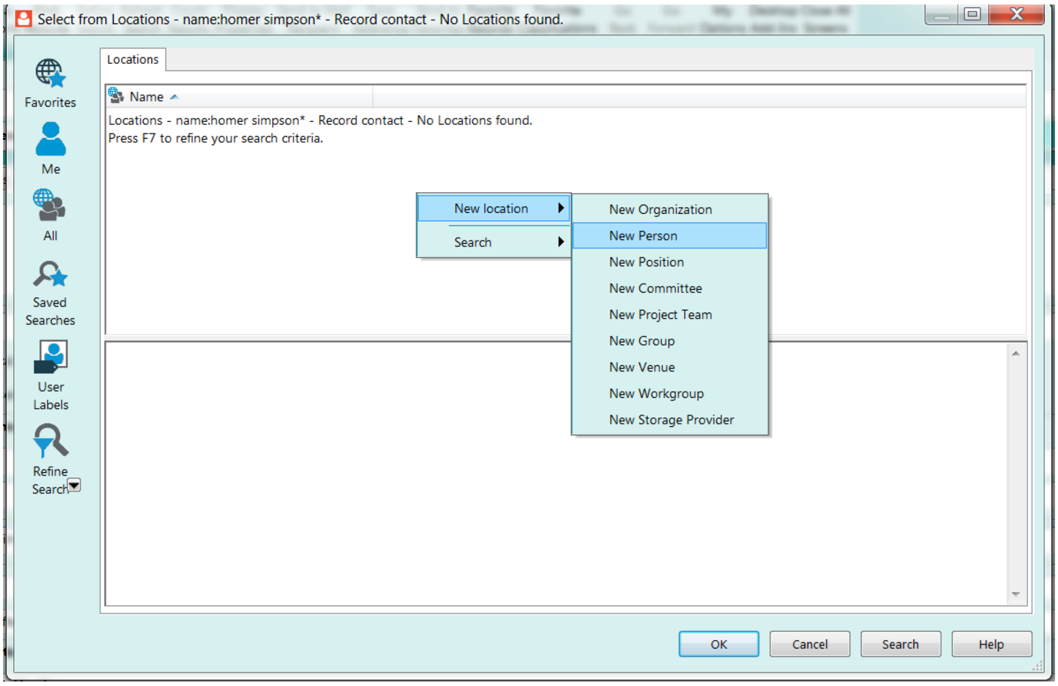
All Users are able to create new **external** locations, as this is required if you need to add a person or an organisation external to CPS into the **Author** field or other Location-based fields as detailed above and TRIM / CM is unable to automatically populate those details.

In the example below, we're registering a document authored by "James Bond", an external person not known to TRIM / CM.

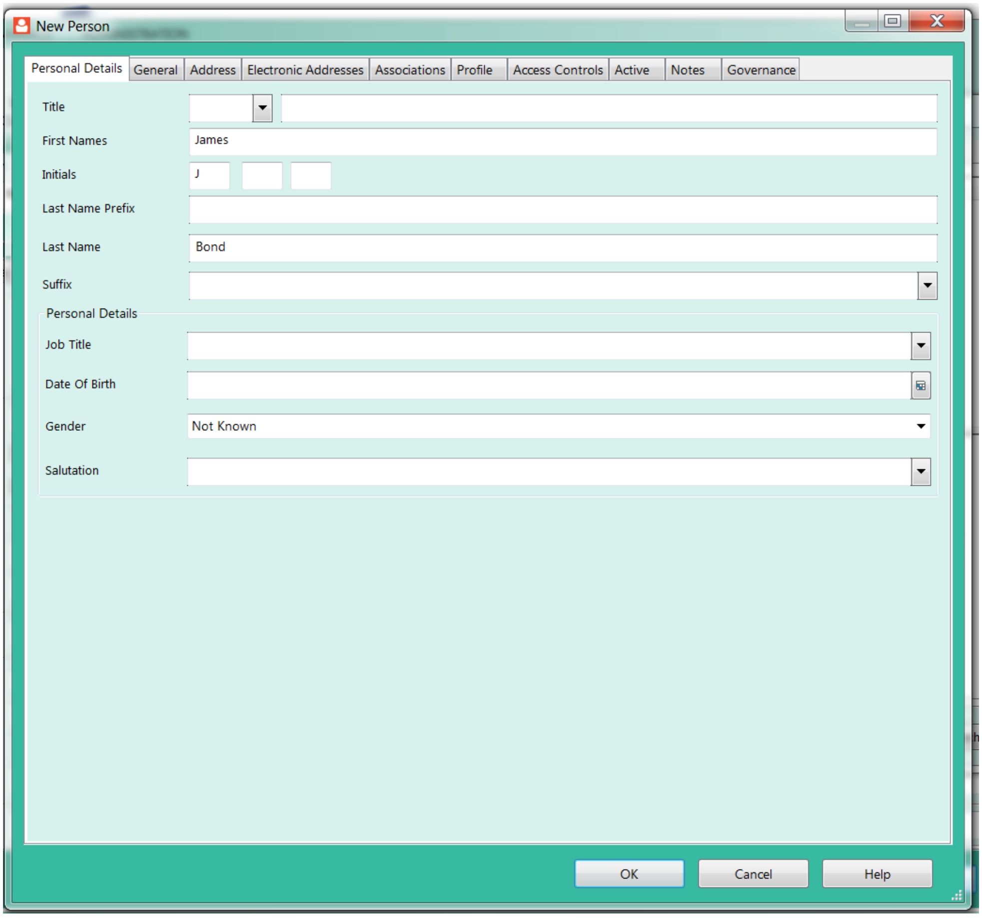
1. If you type a Location in the Author field that doesn't exist in TRIM / CM, you'll see the following message. Click **OK** to close the message:



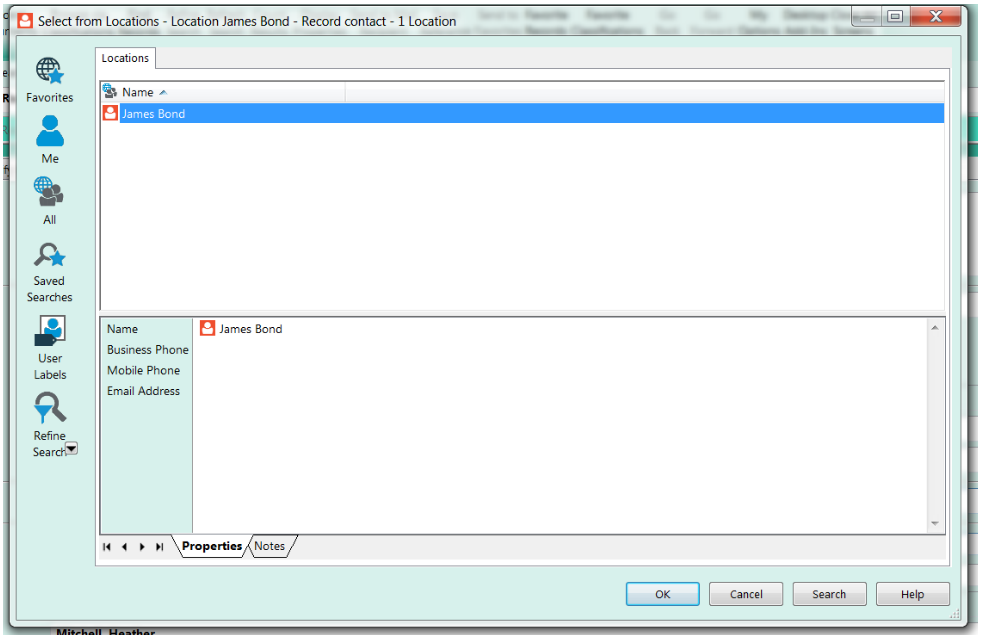
2. To create your new external Location, click the **KwikSelect** button next to the **Author** field. TRIM / CM will display the **Select From Locations** screen. Right click anywhere in the screen and select **New Location**. TRIM / CM will give you a selection of Location types to choose from.



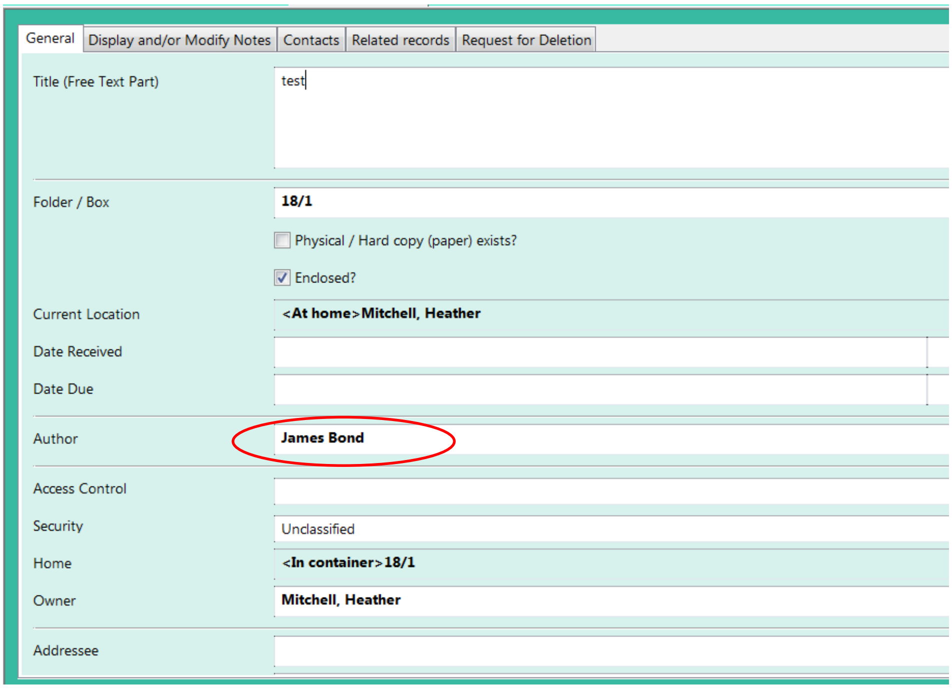
3. To create a new external Person (e.g. a member of the public or a representative of an organisation where it's important that you record the person's name), select **New Person**. TRIM / CM will display the **New Person** dialogue and default the details you entered in the Author field into the **Personal Details** tab:



4. Click **OK**. TRIM / CM will create them as an external Location with no login access, Security Level or access to TRIM / CM functions, and open the **Select from Locations** screen with the new location highlighted:



5. Click **OK** again and TRIM / CM will populate the Author, Contractor/Consultant, Photographer, etc. field in your New Document Properties screen with the new Person in **bold** font.



10. Creating a new external organisation is done the same way as above. Simply select **New Location > New Organization** from the **Select from Locations** screen.

6.2 Send to TRIM

You can also capture records into TRIM / CM from Windows Explorer by highlighting the document, right clicking and selecting **Send to > HPE Content Manager**.

1. TRIM / CM will display the **Select from Record Types** dialogue. (Refer to the list of Record Types in **Section 4.10**, if you're unsure which to choose.)
2. When using this method, it's useful to know the number of the Folder / Box the document will be placed in. If you don't, and it's a Folder you use regularly, it may be listed under the drop down

arrow at the end of the **Folder / Box** field. If it doesn't appear there, you will need to search for it from the Properties screen, by clicking the **KwikSelect** button at the end of the Folder / Box field. See **Section 7.2.1** below for more details

7.2.1 Sub-searching

You can conduct sub-searches from within the **Properties** screen by clicking the **KwikSelect** button at the end of relevant fields. You also have the ability to set your preferred method of searching for folders:

- The first option is for users who like to display and navigate the Business Classification Scheme to locate the required Folder
- The second option opens your Favorites, but allows for searching by Title Word or other preferred methods, including Classifications.

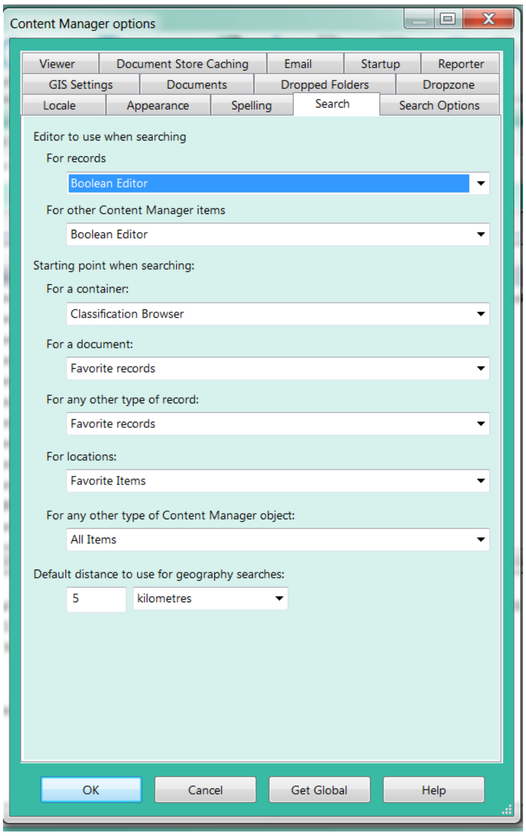
__**Search by Classification Browser**__

If you prefer to navigate the Business Classification Scheme (BCS) to locate the appropriate Folder:

1. Click your **My Options** button from the CPS ribbon, then click the **Search** tab. Under **Starting point when searching**:

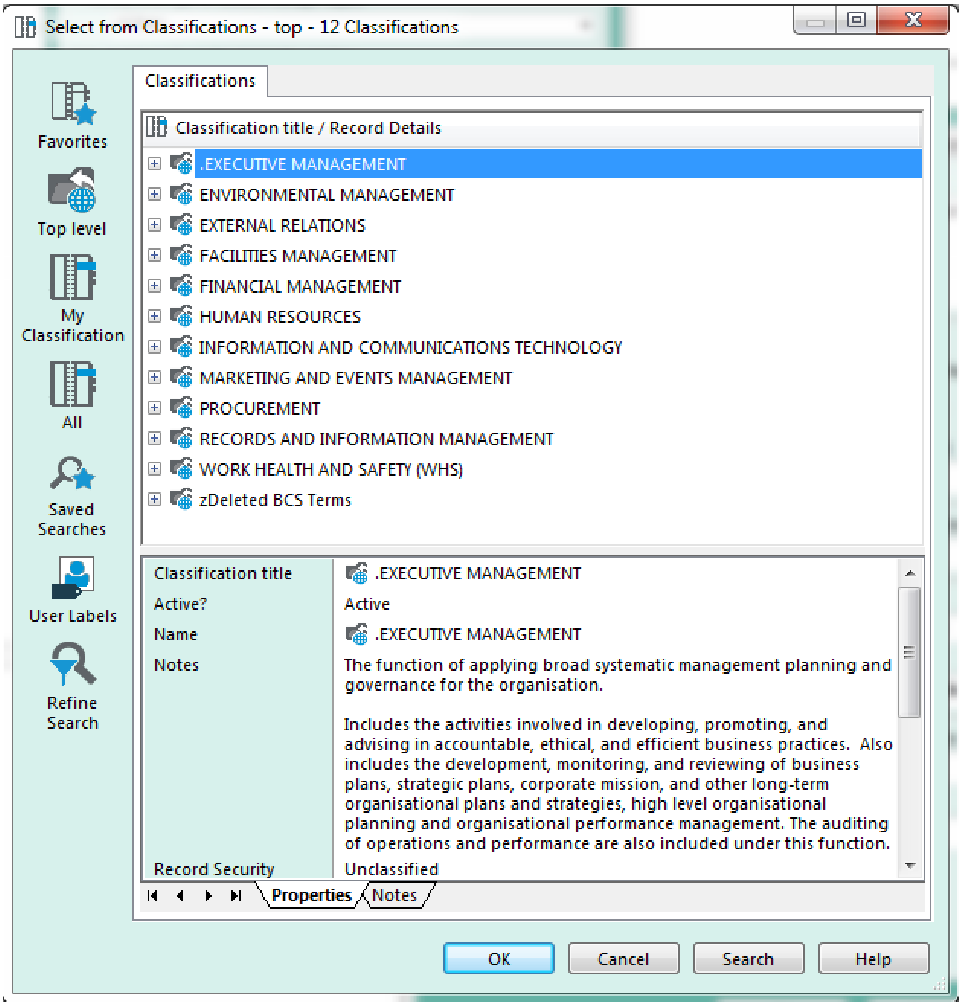
   - change **For a container:** to "Classification Browser"
   - change **For a document:** to "Favorite records"
   - change **For any other type of record:** to "Favorite records"

   and click **OK**.



2. Press **F6** to refresh TRIM / CM and get it to accept the change. You will also have to close Outlook, Word, etc. and reopen them to refresh the Add-ins.

3. Next time you add an email or attachment to TRIM / CM, and go to sub-search for the Folder, TRIM / CM will open a screen like this, displaying the BCS:



4. Simply expand the levels to locate the required Folder and click **OK** to select.

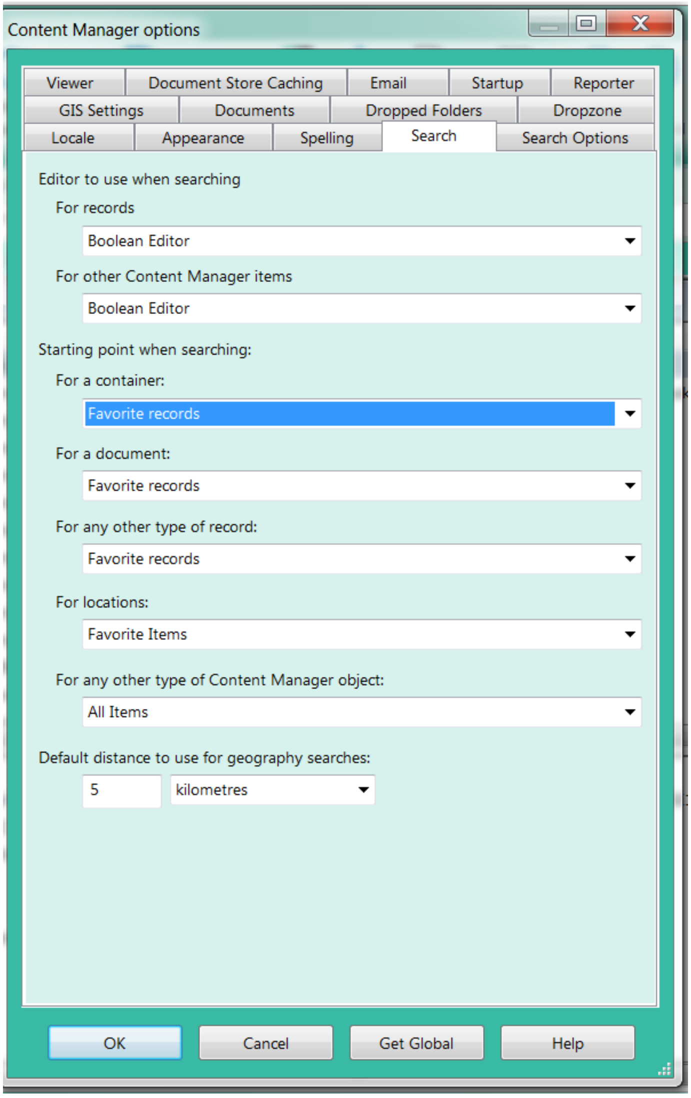
<u>Search by Favorites</u>

This option will allow you to access normal Title Word, Any Word, Date Registered etc. searching:

5. Click your **My Options** button from the CPS ribbon, then click the **Search** tab. Under **Starting point when searching**:

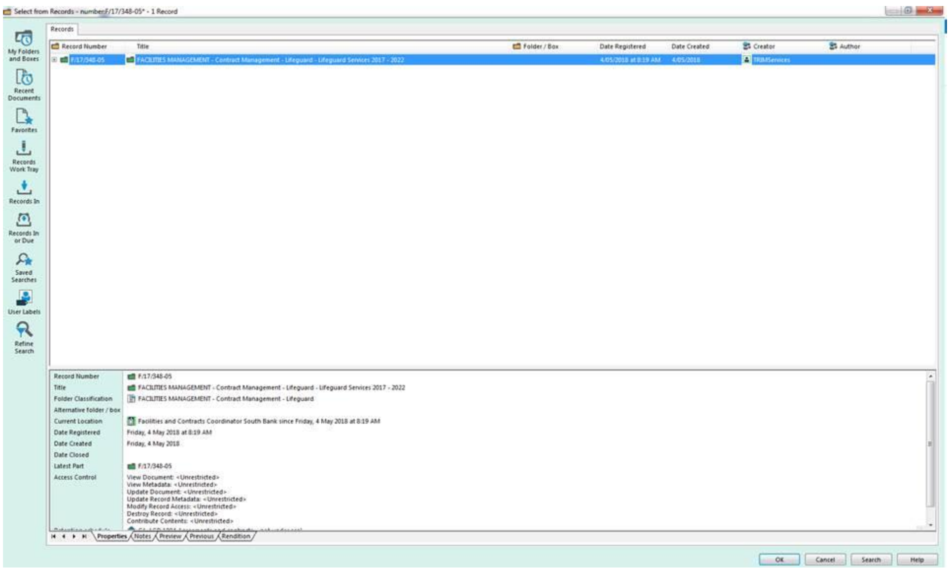
   - change **For a container:** to “Favorite records”
   - change **For a document:** to “Favorite records”
   - change **For any other type of record:** to “Favorite records”

   and click **OK**.



6. Press **F6** to refresh TRIM / CM and get it to accept the change. You will also have to close Outlook, Word, etc. and reopen them to refresh the Add-ins.

7. Next time you add an email or attachment to TRIM, and go to search for the Folder, TRIM / CM will open a screen like this, displaying your Favorite Records:

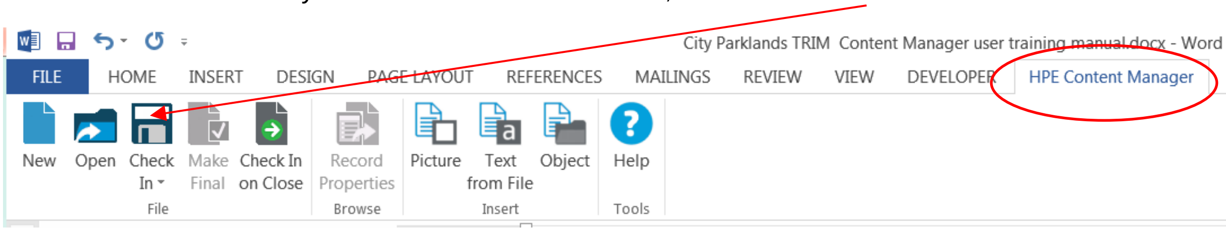


8. Press **F7** or click the **Refine Search** button on the left hand side. A normal search window will be displayed and you can search for Title Words, Any Words, etc. as normal. In addition, you can also access your Favorites and recently edited documents and folders, by clicking the relevant button down the left hand side.

6.3 Saving a Microsoft Word Document Using Add-Ins

You can use the Add-Ins to save a Word document directly into TRIM / CM. When you've finished editing your new document in Word and are ready to save it in TRIM / CM:

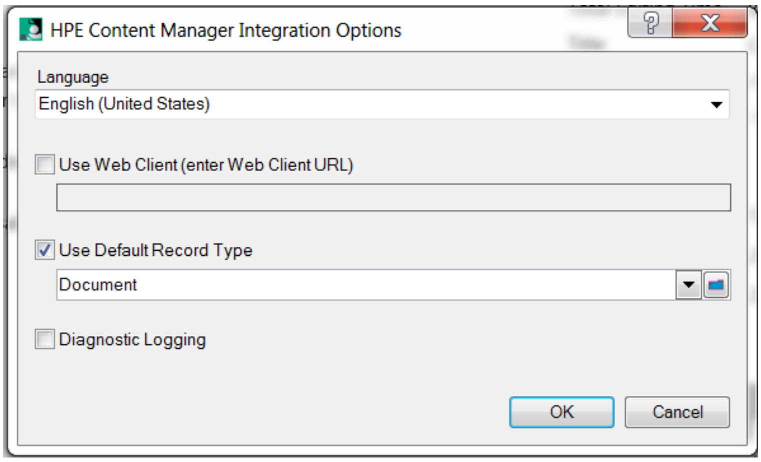
1. In Microsoft Word, select the **HPE Content Manager t**ab. The following options are displayed on the toolbar. To save your document into TRIM / CM, click the blue **Check In** button.



2. The **Select from Record Types** screen will be displayed. Double click on **Document** OR highlight **Document** and click **OK**.

You can configure Word to automatically select **Document** as the default record type, so that you don't have to complete **Step 2.** each time:

1. Click the **File** tab
2. Click **HPE Content Manager Options**
3. The **HPE Content Manager Options** dialogue is displayed. Tick the **Use Default Record Type** box. If **Document** isn't automatically selected, click the **KwikSelect** at the end of the field and select **Document.**



4. Click OK. Word will now know what Record Type to use each time.

3. The **New Document** screen will be displayed. Complete the mandatory fields, incuding the **Folder / Box**, as detailed in **Section 7.2** above and click **OK** to finish.

4. TRIM / CM will capture the document onto the specified folder, then check the document back out to you for further editing if required. You will know that the document has been saved successfully in TRIM / CM, because the document number will be added to the title as you view it in Word.

5. If you're done editing, simply close the document. Alternatively, you can continue to add to the document, then just save it as you normally would in Word and exit. TRIM / CM will check the document back in.

6. Navigate to your **Recent Documents** or to the Folder you placed the document in. The new document should be visible. If not, give TRIM / CM a few seconds to finalise the registration and checking in process and / or press **F5** to refresh your screen.

Exercise 4

1. Open a new Word document and type “TRIM / CM training for” then type the name of your favourite celebrity, sports star, fictional character, etc. Save the document into TRIM / CM via the HP TRIM / CM tab. On the New Document profile form, in the **Title** field enter “TRIM / CM training for *<whatever celebrity name you used in the document>*” and select **F/18/5** in the **Folder / Box** field. If the **Author** field is blank, type **me**. Click **OK** What is the record number of your document?_______________

6.4 Saving Excel Spreadsheets and PowerPoint Presentations

The process for saving Excel Spreadsheets and PowerPoint presentations into TRIM / CM via the Add-Ins is exactly the same as for Word documents in **Section 7.3** above.

6.5 Saving Outlook Emails

Email is an important communication mechanism for conducting business. Like records in other formats, emails that document business activities, decisions, transactions, etc. must be captured into TRIM / CM.

An email is a **record** if it was made, sent or received in the course of conducting CPS business. Therefore, any emails (including attachments) that relate to day-to-day business must be treated in the same way as any other type of records the company creates or receives, and saved into TRIM / CM (see below for who is responsible for capturing emails).

Examples of emails that are **not** records, and don’t need to be captured include:

- Notifications of team meetings;
- Emails received as part of a distribution list for information;
- Emails that are duplicate copies of records already captured in TRIM / CM and used as reference material;
- Spam;
- Personal emails that do not relate to CPS business; and
- Unsolicited advertising material

The table below outlines who is responsible for capturing emails that qualify as records:

Email sent by:	Email sent to:	Who saves it into TRIM?
You	Another person in CPS	You
You	Multiple people in CPS	You
You	External	You
Someone Internal	You or multiple people in CPS	Them
Someone External	You	You
Someone External	Multiple people in CPS	First CPS name in the recipient list

There are several methods available for saving emails into TRIM / CM.

6.5.1 Drag and Drop

Simply highlight the email and drag it out of Outlook onto the relevant Folder in TRIM / CM, as per **Section 7.1** above. The Subject line of the email in Outlook will be appended with **HPE CM:** as an indicator that it's been successfully saved in TRIM / CM.

If you wish to only capture an attachment, rather than the whole email, you can highlight the attachment and drag it onto the Folder in TRIM / CM. The email will **not** be marked with the **HPE CM:** indicator in this case.

6.5.2 Check In Emails via Desktop Add-ins

1. To capture an email into TRIM / CM via the Add-Ins, highlight it and click on the **HPE Content Manager** tab on the Outlook toolbar. You have the following options:

Button / Option	Explanation
Check In	Checks the email into TRIM / CM, including any attachments.
Check In with Style	Check In Styles can be created by any user and configured to point to a particular Folder in TRIM / CM. Clicking this button allows you to choose any Styles you've created to speed up the Check In process. (See **Section 7.5.4** for more).
Open Record	If you like to leave emails in Outlook for quick reference after they've been saved in TRIM / CM, you can click this button to open TRIM / CM and navigate to where the email has been saved.
Open Container	If you have set up a linked Outlook folder (see **Section 7.5.4** below), you can highlight the folder and navigate to the corresponding Folder in TRIM / CM.
Check In attachment(s)	Allows you to check in only the email's attachments.
Progress	Displays the progess as the email is saved into TRIM / CM/ Click the button to turn off the progress bar.
Check In Styles	Displays any Check In Styles that you've configured and allows you to create new Styles or edit or delete exisiting ones.

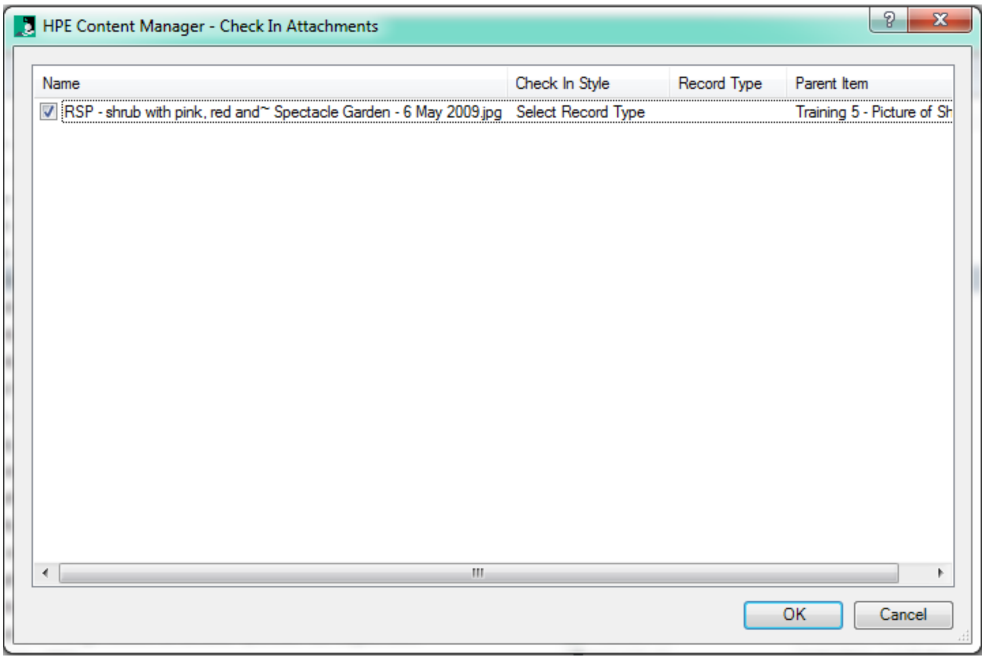
2. Click the **Check In** button. Select the required **Record Type** and complete the **New Document** screen as described in **Section 7.1**.

Exercise 5

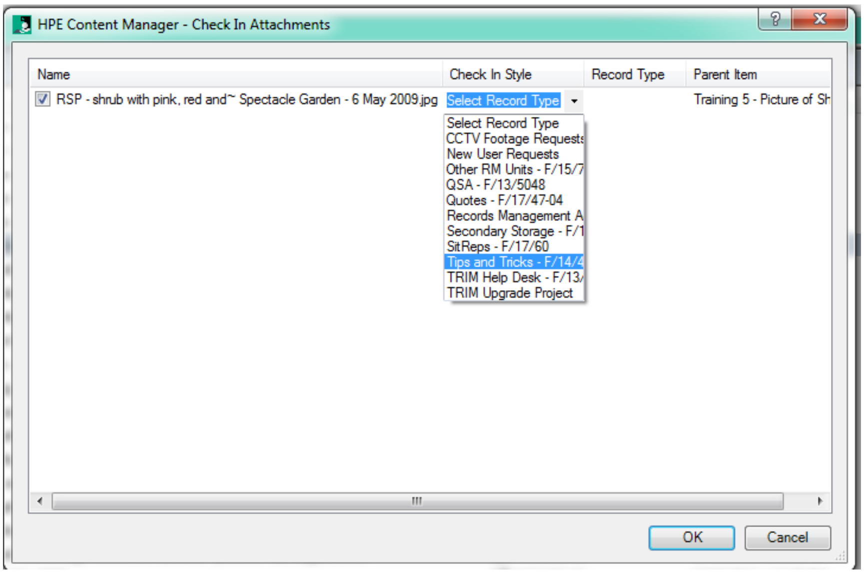
1. Open Outlook. You will find a set of emails titled "Hello, Training<*1-5*> - Welcome to TRIM / CM".
2. Identify the email that corresponds to your training login and save the email into TRIM / CM via the HPE Content Manager tab. On the New Document Properties screen, in the **Title** field enter "Welcome to TRIM / CM training for Training <*number*>", select **F/18/5** in the **Folder / Box** field and click **OK**.
   What is the record number of your email? **D/18/**_______________

6.5.3 Checking In Attachments via Desktop Add-Ins

1. To check in an attachment only, click the **Check In Attachments** button. The **Check In Attachments** dialogue will be displayed:



2. If you've set up a relevant Check In Style, you can click underneath the **Check In** Style column and select from the drop down list. **Note:** Check In Styles have a default Record Type, so care must be taken when (for example) capturing an image, if the specified Record Type is set to **Document**, as there is no way to change this. See **Section 7.5.4** for more.



3. Click **OK**. The **Properties** screen for the relevant Record Type will be displayed. Complete the required fields and click **OK** to finish.

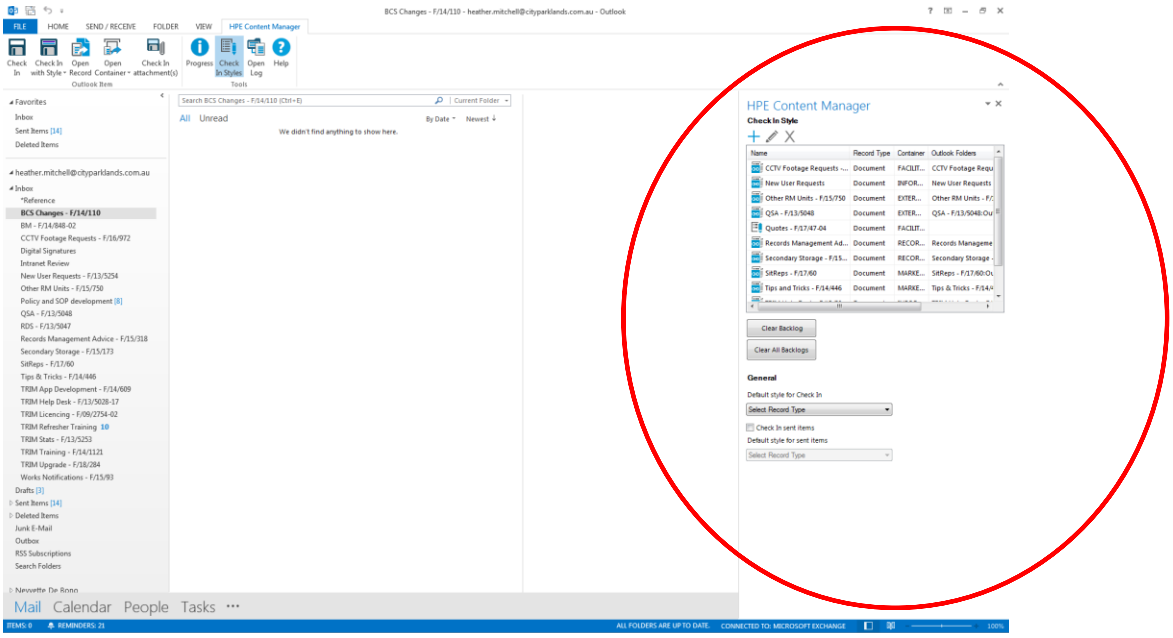
4. If you haven't set up a relevant Check In Style, click underneath the **Record Type** column, select the appropriate Record Type and click **OK**. The **Properties** screen for the relevant Record Type will be displayed. Complete the required fields and click **OK** to finish.

6.5.4 Checking in Emails Using Check In Styles

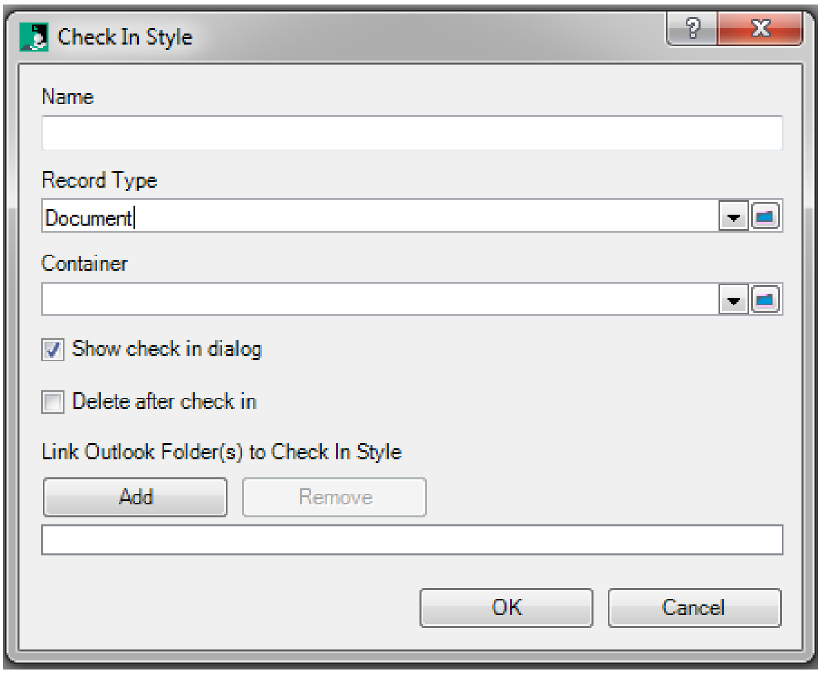
Check In Styles is a feature that allows you to specify check in behaviour for emails dealing with different topics, including linking Outlook folders to TRIM / CM folders.

To create a new Check In Style:

1. Click the **HPE Content Manager** tab in Outlook, then click the **Check In Styles** button. A new pane will open in Outlook similar to the below:



2. Click on the blue plus sign +. The **Check In Style** dialogue will be displayed:

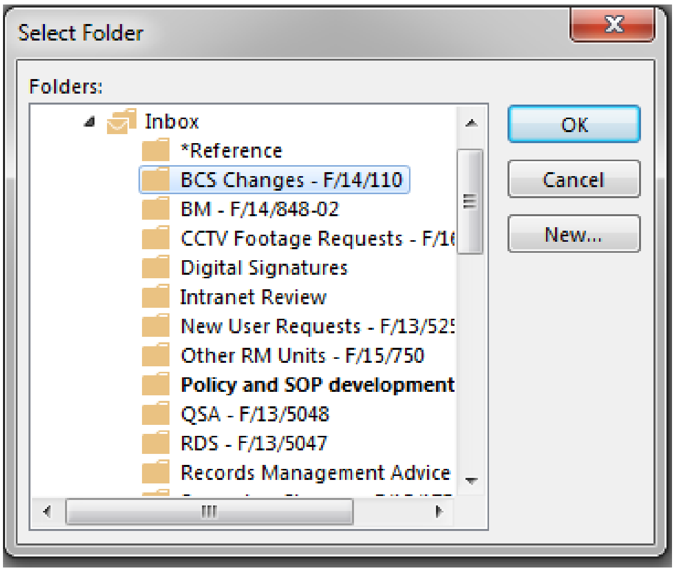


3. Enter a **Name** for your new Style, specify a **Record Type** and add the **Container (**Folder / Box) you wish to link to.

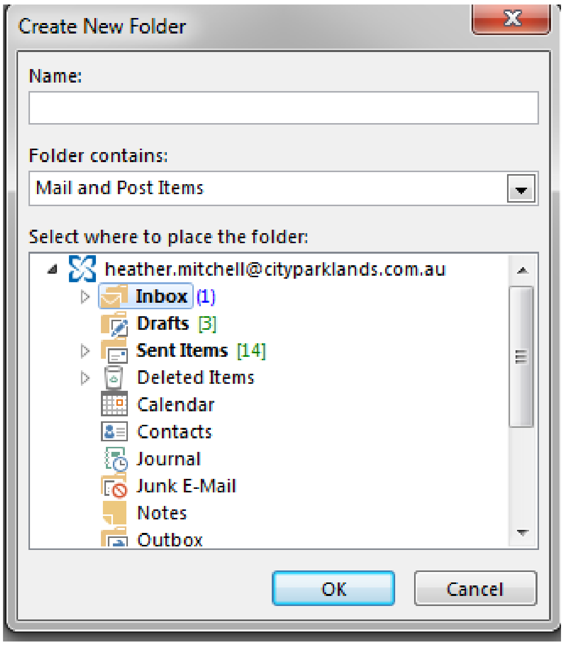
   It's recommended that you tick the **Show check in dialog** box – this will ensure that the **Properties** screen is displayed when you save the email.

   If you tick **Delete after check in**, the email will be moved to your Deleted Items folder in Outlook, once it's been saved in TRIM / CM.

   To link to a folder in Outlook, click the **ADD** button. Linking an Outlook folder means you can drag an email into the folder and have TRIM / CM automatically capture it. If you have a pre-existing folder, select it from the list by highlight it and clicking **OK**.



   If you haven't already created the folder, click the **New** button to create the folder on the fly. Give it a name and specify where beneath your Inbox you'd like it to appear.



   Click **OK.**

4. Once you've set your Outlook folder, click **OK** again to finish creating your **Check In Style**.

	NEVER link your Inbox. If you do, TRIM / CM will try to capture every email you receive.

5. To edit an existing Style, highlight it in the **Check In Styles** pane and click the pencil button. When the **Check In Style** dialogue is displayed, make the desired changes and click **OK** to finish.

You may need to edit a Style if a Folder is closed in TRIM / CM and you need to link to the new part.

<u>To check in emails using a Check In Style:</u>

6. To use your **Check In Styles**, simply drag the email into the linked Outlook folder. The **Properties** screen will be displayed. Complete the required fields and click **OK** to finish.

   Alternatively, you can highlight the email in your Inbox, and click the **Check In With Style** button on the **HPE Content Manager** tab. Select the required Style from the drop down list and complete the **Properties** screen.

If there's a possibility that you might need to capture attachments that might be Images, Documents, Multimedia, etc to the same TRIM / CM Folder, you can create multiple Styles with different Record Types that point to the same Folder. Just ensure that you give each Style a unique name.

7. Updating Documents in TRIM

Once documents are registered into TRIM, you're still able to edit them, provided you have the right access, security permissions and editing abilities in the native software e.g. a small number of users have access to Adobe editing functionality for .pdfs, but the majority of users don't.

Note: The only type of document which **cannot** be edited is email.

To make changes to a document, you can open it in **Edit** mode, or check the record out of TRIM / CM for editing. If using **Check Out**, the record must be **Checked In** once changes are complete.

Use **Edit** when you only wish to work on the document for a short period of time e.g. less than a couple of hours. Use **Check Out** / **Check In** if you intend to work on the document for an extended period of time e.g. hours or days.

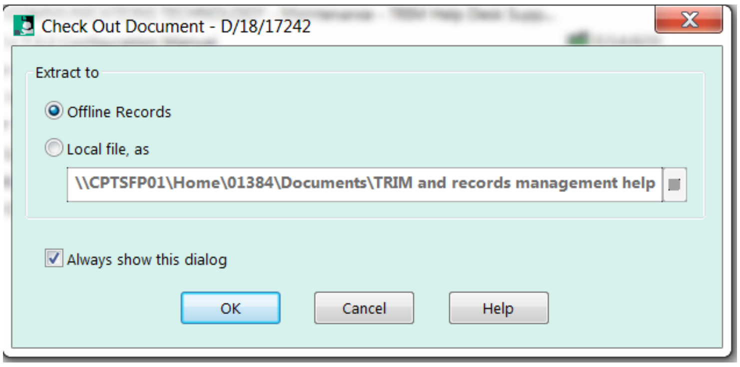
Both the **Check Out / In** and **Edit** functions lock the document to you for updating. Other users can only view the document while you're working on it.

	If you check out a document and are away from work for an extended period, only a TRIM / CM administrator can check the document back in. When checked in by anybody but yourself, any changes you made to the document will be lost; therefore, it's good practice to check documents back in at the end of each day.

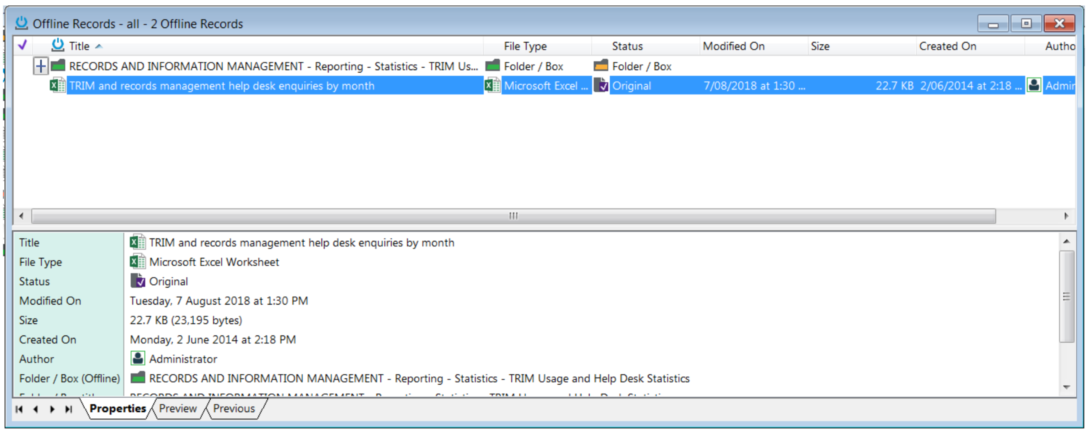
7.1 Check Out and Check In

To edit documents using **Check Out**:

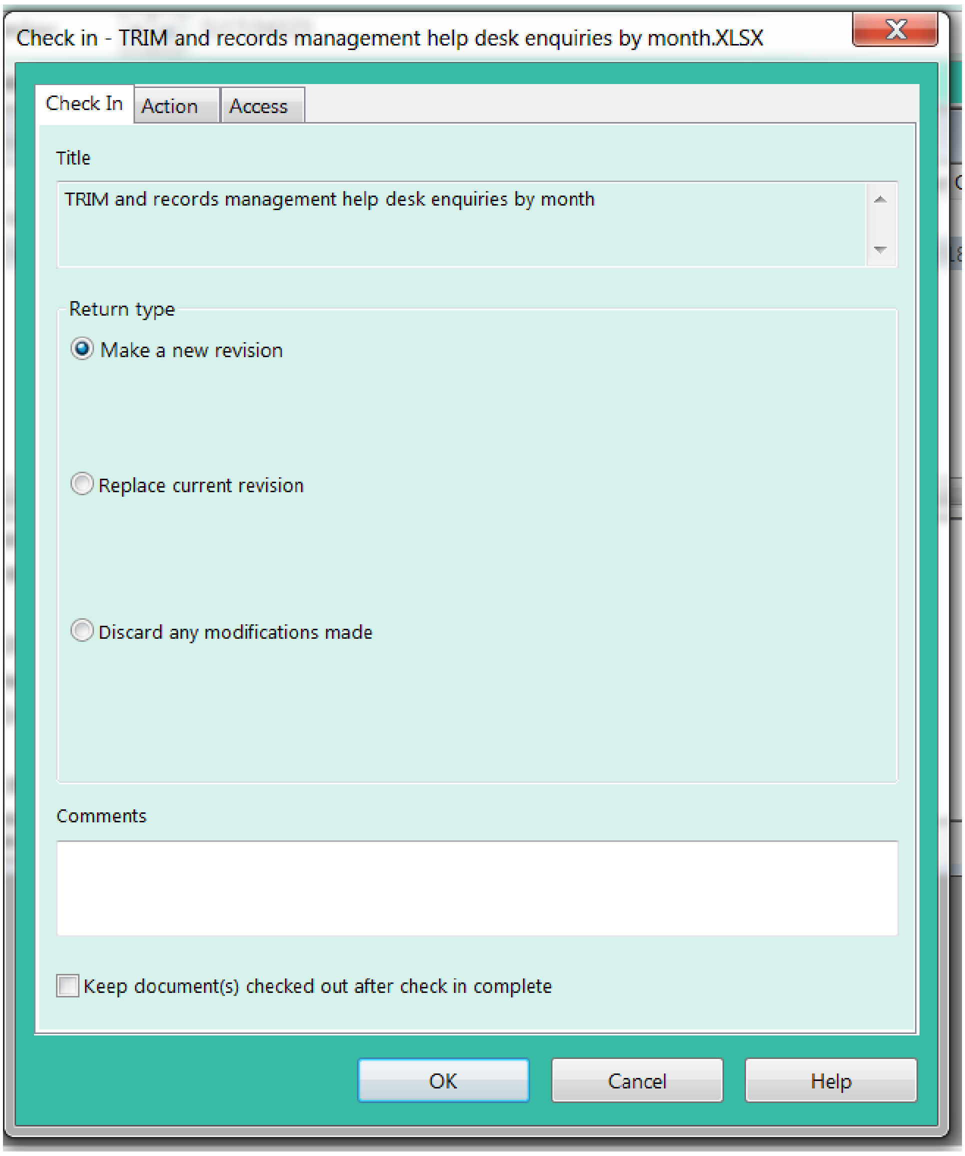
1. Navigate to or search for the record you want to edit. Highlight it, then either click the **Check Out** button on the Ribbon OR right click, then select **Check Out**.
2. TRIM / CM will ask where you want to check the document out to. It is strongly recommended that you always select **Offline Records** so your checked out records are always stored in one place. Click **OK.**



3. TRIM / CM will place the record in your **Offline Records**. Open your **Offline Records** by clicking the **Offline Records** button on the Ribbon OR clicking **Trays** on your **Shortcuts** pane, then clicking **Offline Records**.

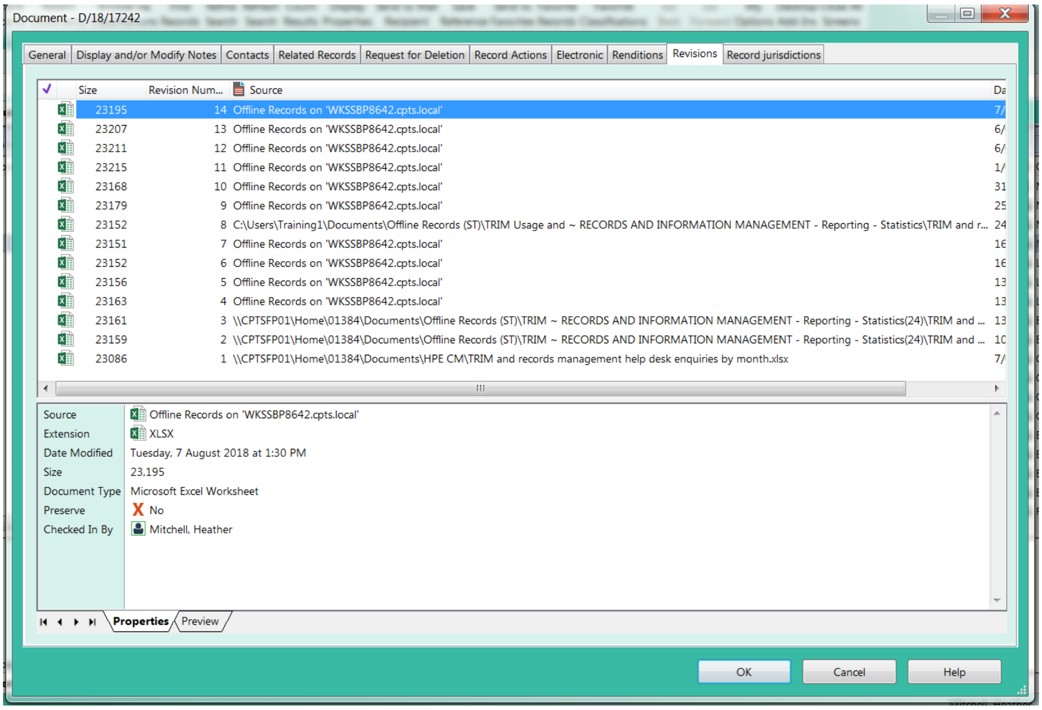


4. Highlight the record, right click and select **Open**. TRIM / CM will launch the application your document was created in and open the document for editing.
5. Make your changes to the document, saving regularly.
6. When you're ready to check the document back in, make sure you save and close it. In TRIM / CM, navigate back to **Offline Records** and highlight the document. Click the **Check In** button on the Ribbon OR right click and select **Check In**.
7. TRIM / CM will ask how you want to check the document back in. Unless you have a valid business reason for replacing (i.e. removing) the current revision of the document, always select **Make a new Revision**. This will ensure previous versions of the document are kept. Click **OK**. Your checked in document will disappear from **Offline Records** and appear in the list of your **Recent Records**. If it doesn't appear, you may need to completely close the authoring application to complete the registration process.



	Each time you edit, or check out and update a document, TRIM / CM creates a revision (a modified version), so that you can trace the evolution of the document. TRIM / CM also creates a revision if you drag and drop a modified version onto an existing document. The document always keeps the same Record Number (e.g. D/19/1234) and Title so you can continue to find it via a search or in your Favorites or Recent Documents.

8. To view previous revisions of documents, highlight the record, right click and select **Properties**. Click the **Revisions** tab. You will be able to see the previous revisions of the document. From here you can right click and view, extract copies of, or print the previous revisions. You can also use the **Preview** tab at the bottom of the **View Pane** to quickly view the contents of each revision.



Exercise 6

1. Locate the Word document you created in **Exercise 4**. Check it out and open it for editing. Add today's date to the document, then save and close it. Check it back in to yourself.

7.2 Editing Documents

The **Edit** function works in much the same way as **Check Out** / **Check In**, but with fewer steps.

1. Locate and highlight the document you wish to edit. Click the **Edit** button on the Ribbon OR right click and select **Edit** OR press **CTRL O**. The document will open in its native application.

2. Make the required changes and save it in Word, Excel, etc. TRIM / CM will automatically check the document in. This may take up to 30 seconds. **NOTE**: TRIM / CM will not prompt for how to manage the revision; it will simply create a new revision.

7.3 Drag and Drop to Create a New Revision

In some instances, you may need to edit a document while it's outside of TRIM / CM. This could be when you're working when you're working on a TRIM / CM document copied to your desktop or have received a revision of a document via email.

As a result of working on the document outside of TRIM / CM, you may need to replace the older revision of a document with a more recent one. Just as you can drag and drop new documents into TRIM, you can also drag and drop a new revision.

1. Navigate to the document you wish to update.

2. Navigate to the location where you have the new revision (usb stick, desktop, email, etc).

3. Click and drag the new revision of the document onto the current revision in TRIM.

4. The Check In dialogue will be displayed with the default **Make a new Revision** selected. Note: If the document you are 'dragging' has a different name to the original in TRIM, the original TRIM / CM name will remain the same.

The drag and drop method should only be used if you are the **only person** updating the document. For documents where a number of users have to collaborate e.g. dashboards and board reports, use **Check Out / In** or **Edit**, otherwise you may inadvertently overwrite someone else's changes.

Ensure the document you're trying to update is **Checked In**. If not, TRIM / CM will think you want to create a new document.

Ensure you update the correct document. To prevent accidentally saving over the wrong one, search for the document by Record Number. This will ensure that only the correct document is displayed in the List Pane.

7.4 Promoting Revisions

TRIM / CM allows you to promote older revisions so that they become the current revision of the document e.g. if you accidentally dragged and dropped on top of an incorrect document, or if the most current revision of a policy or SOP is a .pdf document and you need to promote the last Word version to the top for updating.

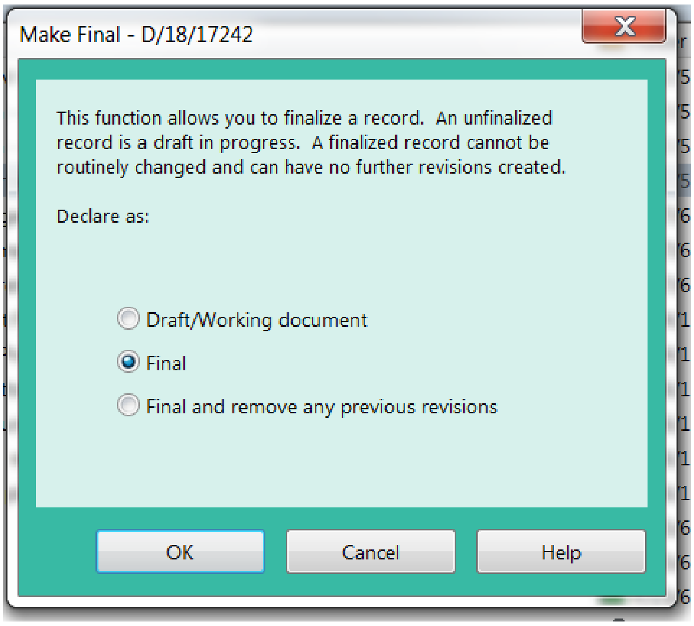
To promote a revision:

1. Highlight the record, right click and select **Electronic > Promote Revision**. TRIM / CM will display a list of previous revisions.
2. Highlight the revision you wish to promote, and click **OK**. The revision you just promoted will become the current revision that authorised users see when they view or edit the document.

7.5 Finalising Records

Once the final revision has been completed on a document, it's good practice to declare it as final, to prevent anyone inadvertently saving a new revision over the top. This can always be reversed later if you need to create another revision.

1. Highlight the record you wish to finalise, right click and select **Electronic>Final**. TRIM / CM will display the **Make Final** screen. Select **Final** and click **OK**.



2. To reverse this at any time, right click and select **Electronic>Final**. Select **Draft/Working Document** and then click **OK**. This will reset the document to "draft" and allow you to make new revisions.

8. Extracting Documents from TRIM / CM

You are able to extract copies of records from TRIM / CM in three ways.

8.1 Drag and Drop

Display the local folder (e.g. on network or USB stick) you want to extract the copy to. Highlight the document in TRIM / CM, then drag and drop it on the local folder.

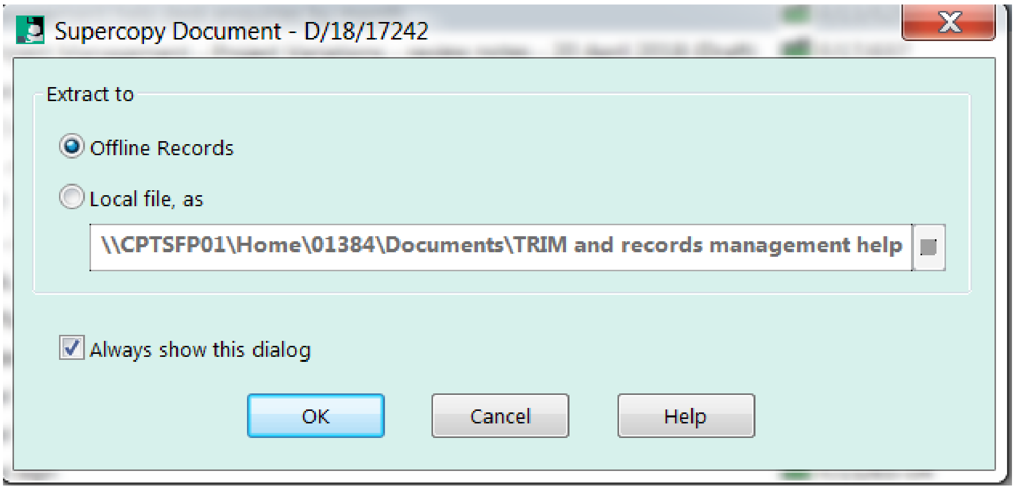
8.2 View and Save As

You can also make a copy of a TRIM / CM document simply by right clicking and selecting **View** to open it as read-only in its native application. Use the application's **Save As** command to save it to a local or network drive.

8.3 Supercopy

The **Supercopy** command copies a document from TRIM / CM to your Offline Records or a folder of your choice:

1. Right-click the record and select **Supercopy.** The **Supercopy Document** dialogue box will appear. If you select **Offline Records**, you will be able to access a copy of this original document in your Offline Records. If you select **Local File, as**, use the browse button at the end of the field to select a local or network drive. Click **OK** to finish.

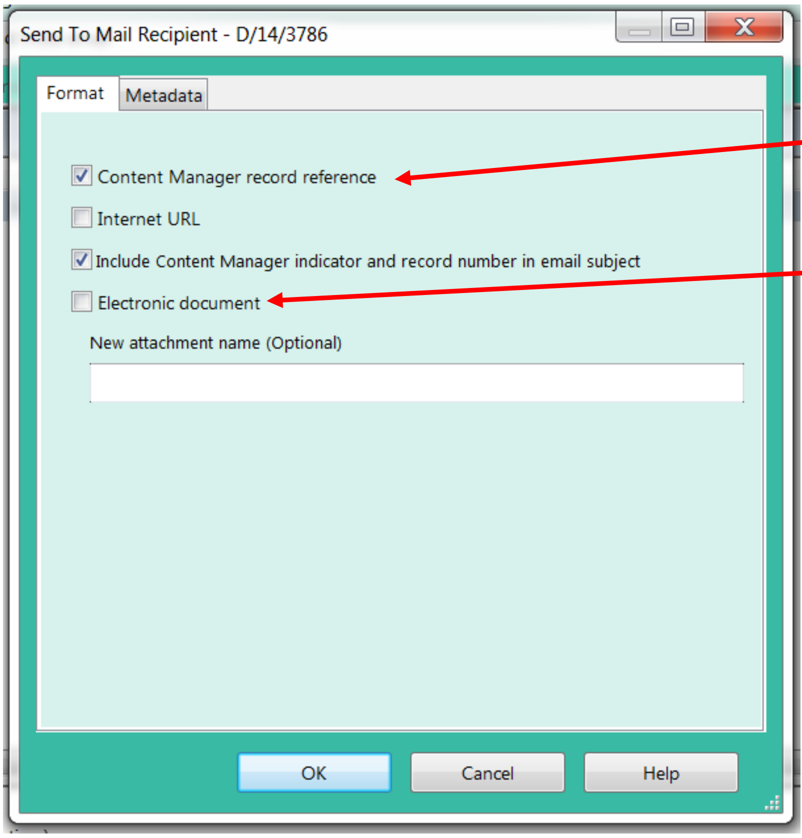


9. TRIM / CM Reference Links

TRIM / CM allows you to create links to records (known as references) which can be emailed to City Parklands staff with access to TRIM. You can also use this feature to email copies of electronic documents to external clients. TRIM / CM links can also be placed on the Intranet or within meeting invitations, etc. to provide quick access to the document. Double clicking the reference link opens TRIM / CM and navigates to the record.

9.1 Sending a Reference via Email

1. Locate the record you want to email. Highlight the record and click the **Send to Mail Recipient** button on the Ribbon OR right click and select **Send To > Mail**. TRIM / CM will display the **Send to Mail Recipient** dialogue box. Select required option and click **OK**.



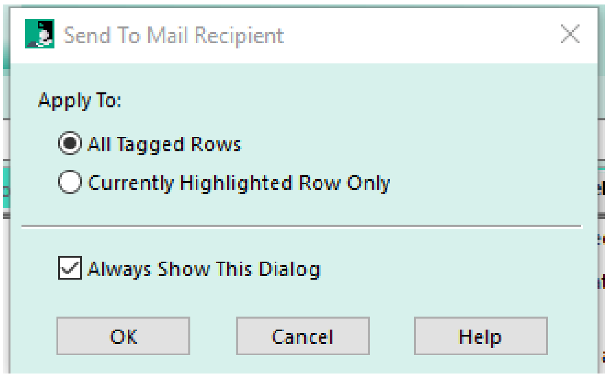
Tick **Content Manager record reference** when sending to internal users. This provides a direct link to the record in TRIM.

Tick **Electronic Document** if sending to an external person to send a copy of the record.

Tick both if sending the attachment to both internal and external contacts in the same email.

2. Outlook will open a new email containing the link or copy of the electronic document (or both). This may take a few seconds. Add addressees, subject line and body text as for any email and send.

3. If you wish to send several links in the one email, tag all of the required records and click the click the **Send to Mail Recipient** button on the Ribbon OR right click and select **Send To > Mail**. TRIM / CM will ask you to confirm if you want to make references for all tagged rows.



4. Once you click **OK**, the **Send To Mail Recipient** dialogue will open. Proceed as for **Step 1** and **2** above.
5. If you receive an email containing a TRIM / CM reference, simply double click the link and TRIM / CM will open and automatically navigate to the record.

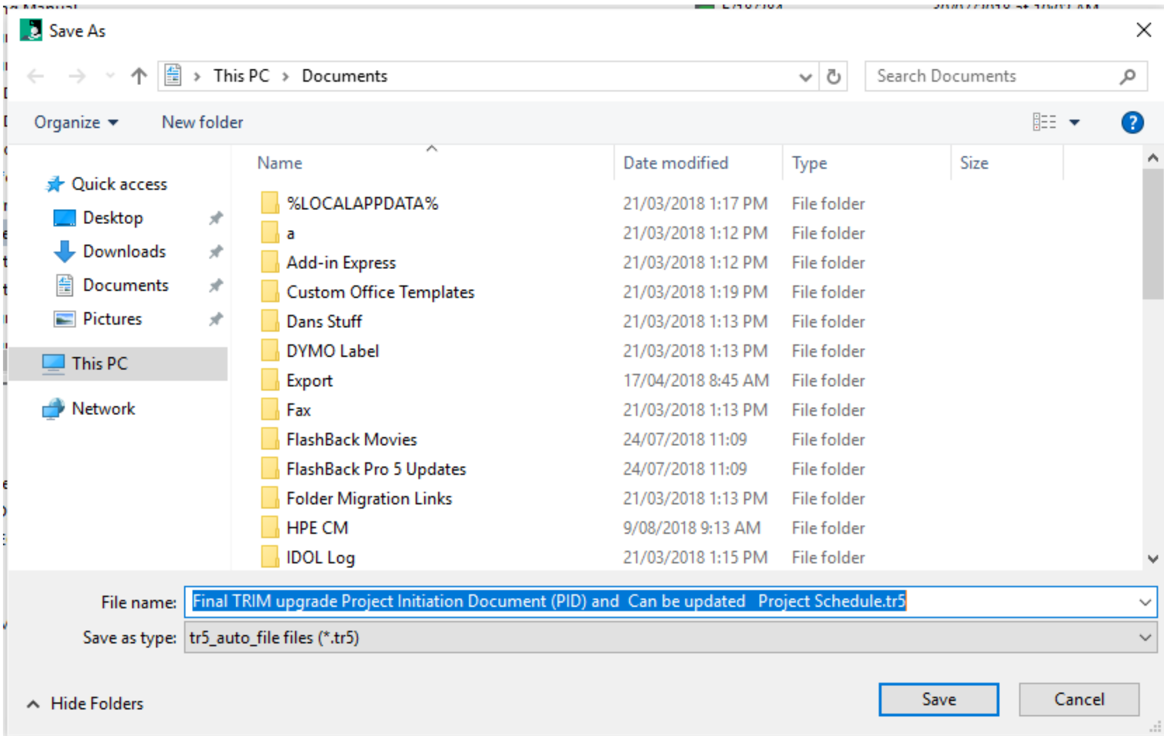
Exercise 7
1. Send an email with a TRIM / CM reference link to the Word document you created in **Exercise 4**, to training@cityparklands.com.au.

9.2 Saving a Reference

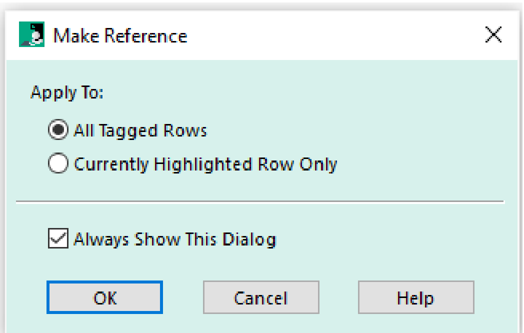
To save a reference link for use on the Intranet,

1. Locate the record you want to reference. Highlight the record and click the **Save Reference** button on the Ribbon OR right click and select **Send To > Save reference**.

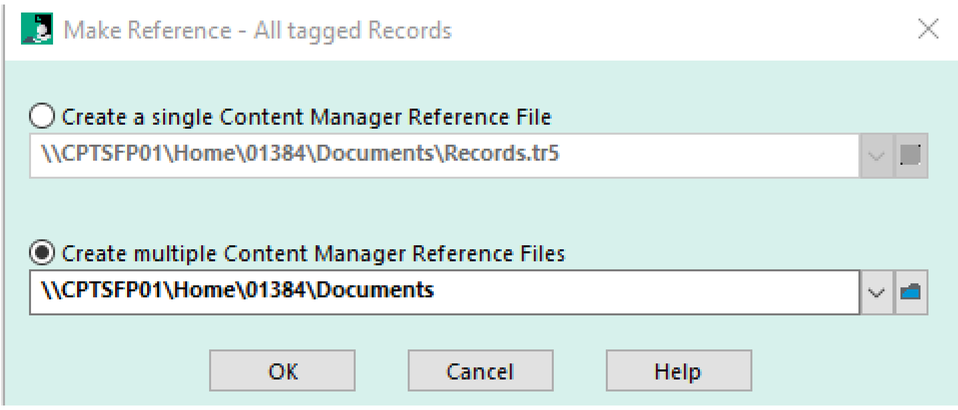
2. TRIM / CM will prompt for a location to save the reference link



3. Select the preferred location and click **Save**. The link will be saved as a .tr5.
4. If you wish to create reference links for a number of records at the same time, tag all of the required records and click the **Save Reference** button on the Ribbon OR right click and select **Send To > Save reference**. The **Make Reference** dialogue will be displayed.

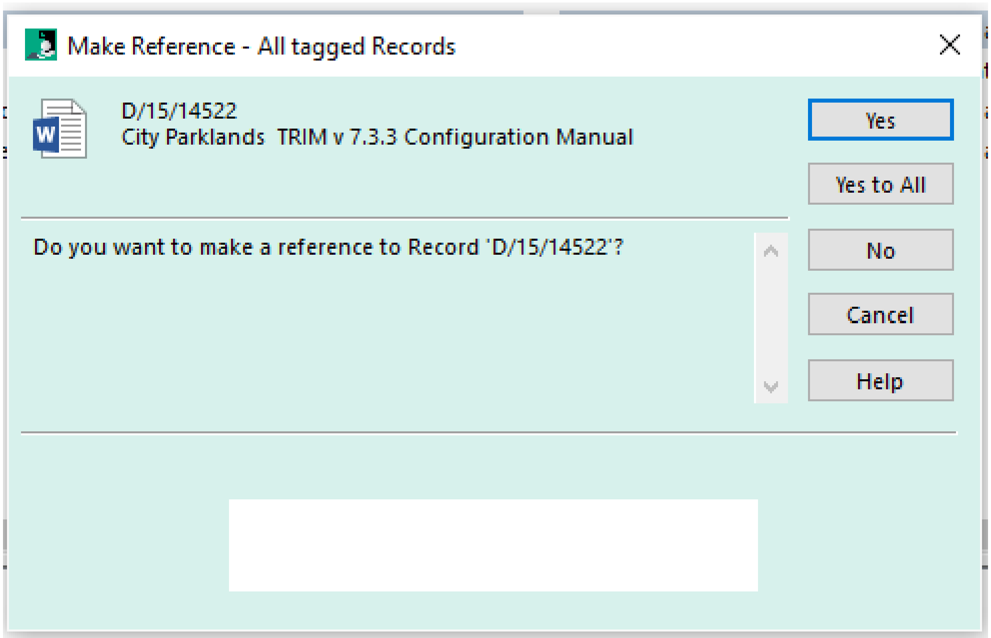


5. Click **OK**. TRIM/ CM will ask whether you wish to create a single reference link containing all selected records or individual links for each record.



6. Click the required option, browse to the required network location using the **KwikSelect** button and click **OK** to finish.

7. TRIM / CM will ask you to confirm that you want to make a reference for each record. Click **Yes to All** to continue.



8. The reference link will be created in the nominated location.

10. Security in TRIM / CM

TRIM / CM uses various types of security to provide privacy controls to the records it manages:

User Types – each user is allocated a User Type which controls what system functions they are able to perform in TRIM.

Access Controls - restrict access to who can view, update or modify records. Depending on access controls, staff may have the ability to apply their own settings, but you should be rarely required to amend these for documents, as TRIM / CM is set up so that documents inherit the access controls of their Folder.

Security Levels – are a way of ensuring that records can only be accessed by Locations who have the same Security Level or a higher Security Level than that allocated to a record. Security levels are assigned based on the sensitivity of the contents of the record.

Caveats - ensure that records can only be accessed by Locations that have the same caveats attached to their profile. i.e. a User may be in the correct Access Control group and have the right Security Level, but if they don't have the caveat attached to their profile, they will not be able to access the record.

Allocating access rights and security privileges should be approached with caution. The over-allocation of security will impact on the ability of staff to view and update records they legitimately need to access for business purposes.

10.1 Understanding Access Controls

The 'Access Controls' section in TRIM / CM allows you to apply specific security to records and objects such as Saved Searches, provided that you have the necessary permissions.

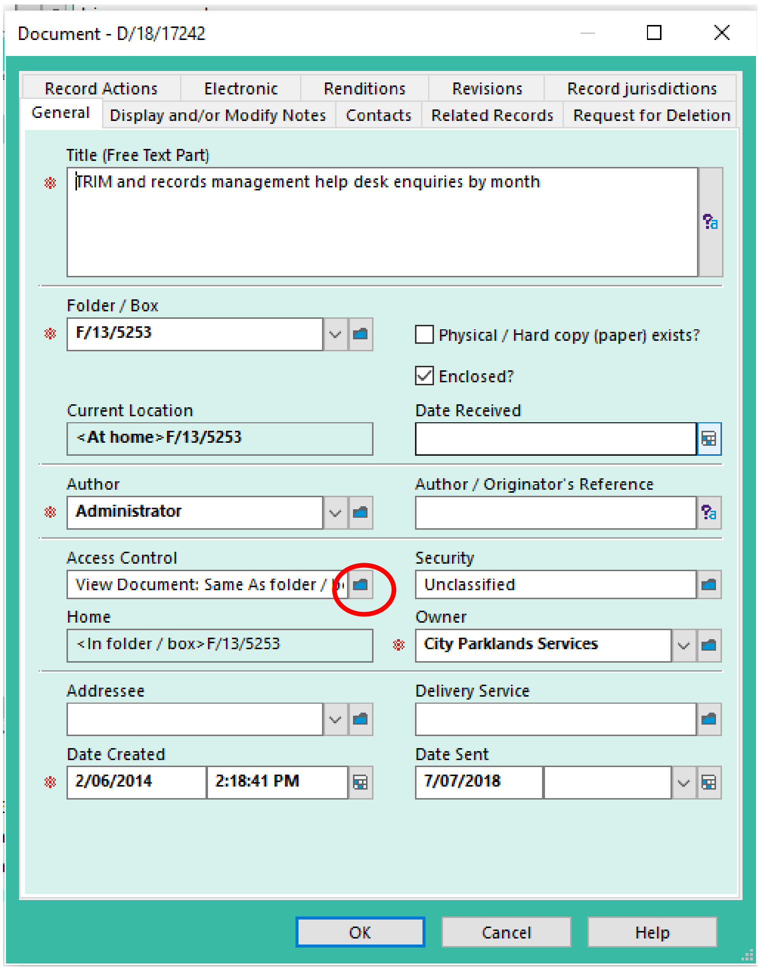
There are several types of access that can be granted to records. For example, you may want a certain group of users to be able to *view* the document, but not *edit* it.

Access To	Description
View Document	Authorised users can view the electronic document. Unauthorised users cannot view the electronic document, only its properties.
View Metadata	Authorised users can view a record's metadata i.e. its Properties. Unauthorised users will not even be able to locate the record in a search.
Update Document	Authorised users can modify the electronic document by using the Check Out or Edit function. Unauthorised users are only able to view the document as 'read only' or extract a copy.
Update Record Metadata	Authorised users can modify the Properties of a record. Unauthorised users will not be able to update the metadata (all Property fields will be greyed out).
Modify Record Access	Authorised users can modify the Access Controls for the selected record. Unauthorised users will be disabled from applying access controls and all access options will be greyed out.
Destroy Record	Only TRIM / CM Administrators are authorised to destroy records.
Contribute Contents	Authorised users are able to add documents, images, etc to that Folder or Box. Unauthorised users will be disabled from contributing to that Folder or Box.

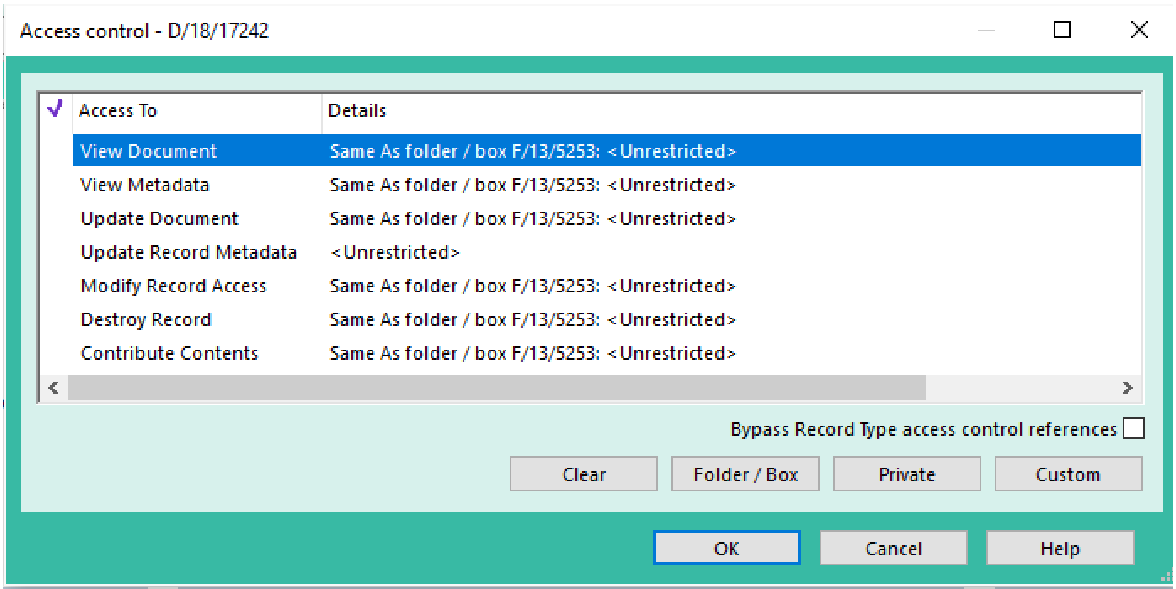
Sensitive records which contain personal or other confidential information are set up in TRIM / CM to inherit their access controls from the Classification Scheme by default, to ensure that no security breaches occur.

10.2 Viewing Access Controls

1. Highlight the record and click the **Display Properties** button OR right-click **Properties**. TRIM / CM will open the **General** tab. Click on the **KwikSelect** button beside the **Access Control** field.



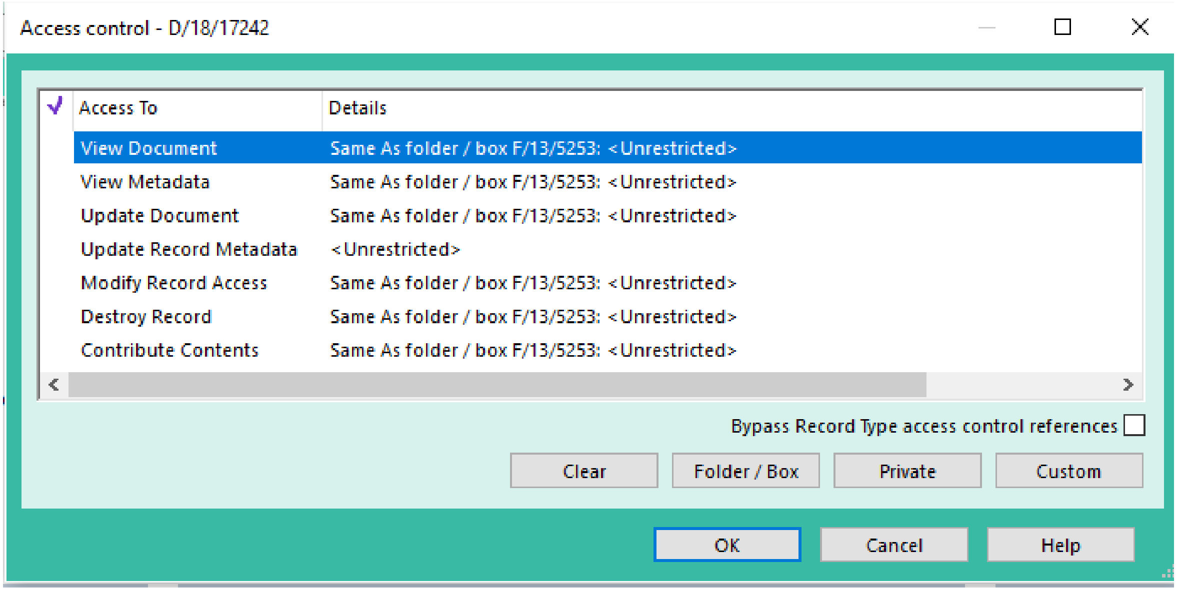
2. TRIM / CM will open the **Access Controls** window. From here you can see which Positions or Groups are able to view the record and its metadata, update documents (i.e. edit), update record metadata (i.e. elements in the Properties, such as Title, Current Location, etc.), modify record access (i.e. change access controls and security levels), destroy the record and contribute contents (i.e. add documents to Folders).



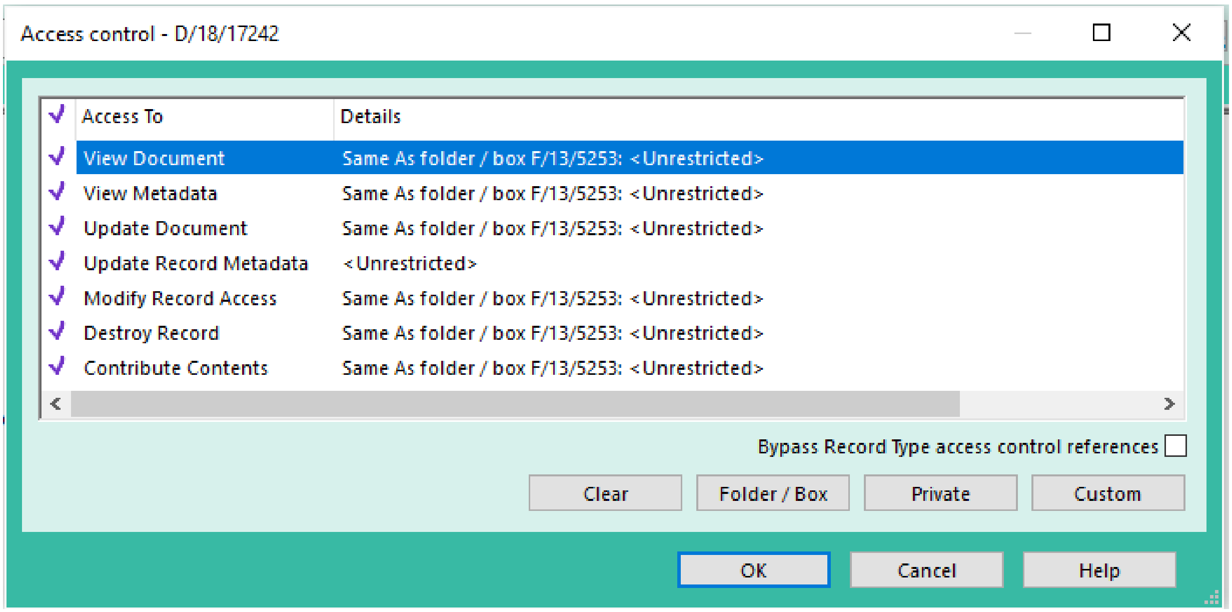
10.3 Setting or Changing Access Controls

Note: If you need to change the access controls on a Folder which is inheriting default access controls, please contact the Records and Information Coordinator for advice.

1. Open the **Properties** of the record and click on the **KwikSelect** button beside the **Access Control** field. TRIM / CM will open the **Access Controls** window.



2. To select the access types that you wish to modify, tag them by clicking in the column to the left of the access types.



3. There are four options for modifying access. These correspond with the four buttons along the bottom of the dialogue box:

   - **Clear:** Removes any specific access controls and either sets it to be unrestricted or to the default inherited access control.
   - **Folder / Box:** Sets the access on the record to be the same as the container it's located in.
   - **Private:** Restricts the action to the logged in user.
   - **Custom:** Allows you select the individuals or groups you want to restrict this action to.

Under **no** circumstances should you ever change a record's access controls to **Private.** This will restrict the record to yourself as a User, and even the TRIM / CM administrator may not be able to access it, if you have locked down the **View Metadata** option.

10.4 Updating Security Levels

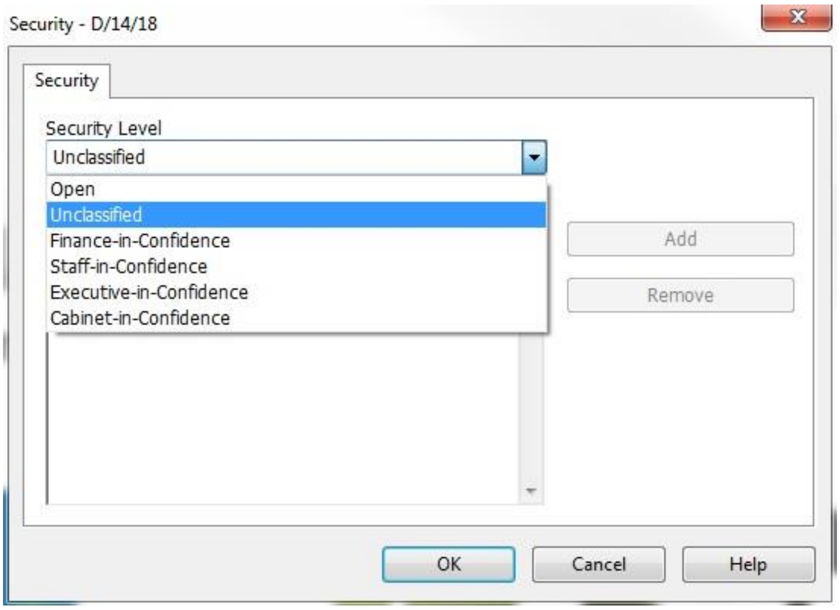
The following Security Levels exist in TRIM:

Level	Description
Cabinet-in-Confidence	Used for all records where the unauthorised and/or premature disclosure can be damaging the public policy agenda and the government generally, and to the public interest.
Executive-in Confidence	Used for records whose compromise could cause, but not be limited to: • short term distress to individuals or private entities • short term damage to any party's standing or reputation • minor inconvenience to any party including the Company • moderate level of financial loss or loss of earning potential to, or facilitate improper gain or advantage for individuals or private entities • moderate loss of between<2% to <5% of the Company's monthly budget • measurable impact, breach undertakings to maintain the confidentiality of information provided to or by third parties • prejudice investigation or facilitate commission of violations that will be subject to enforcement efforts • measurable short term damage to the environment • measurable impact on the Company's work force • measurable impact on the Company's' risk of litigation Includes records associated with the Board and/or Executive of CPS.
Staff-in-Confidence	Used for records whose compromise could cause, but not be limited to: • short term distress to individuals or private entities • short term damage to any party's standing or reputation • minor inconvenience to any party including the Company • moderate level of financial loss or loss of earning potential to, or facilitate improper gain or advantage for individuals or private entities • moderate loss of between<2% to <5% of the Company's monthly budget • measurable impact, breach undertakings to maintain the confidentiality of information provided to or by third parties • prejudice investigation or facilitate commission of violations that will be subject to enforcement efforts • measurable short term damage to the environment

Level	Description
	• measurable impact on the Company's work force • measurable impact on the Company's' risk of litigation They include all official staff records where access would be restricted to HR personnel and nominated authorised staff e.g. personal files, recruitment information, grievance and disciplinary records.
Finance-in-Confidence	Used for records whose compromise could cause, but not be limited to: • short term distress to individuals or private entities • short term damage to any party's standing or reputation • minor inconvenience to any party including the Company • moderate level of financial loss or loss of earning potential to, or facilitate improper gain or advantage for individuals or private entities • moderate loss of between<2% to <5% of the Company's monthly budget • measurable impact, breach undertakings to maintain the confidentiality of information provided to or by third parties • prejudice investigation or facilitate commission of violations that will be subject to enforcement efforts • measurable short term damage to the environment • measurable impact on the Company's work force • measurable impact on the Company's risk of litigation They include all procurement/contract/agreement or other commercial details such as sensitive intellectual property. For example, draft request for offer information, tender responses and evaluations, designs and Company owned research. They also include activities including public incidents where there is an investigation and/or a likelihood of compensation payment/s. Other examples are banking records, accounting records for expenditure and revenue as well as audit and risk reports which identify management and control weaknesses or practices that expose the Company to moderate financial risks.
Unclassified	Used for records that are not in the public domain, but do not otherwise need to be classified.
Volunteer	Used to allow volunteers at SBP and RSP to access a limited number of roster records in TRIM.
Open	Used for records that may be released to or are available for the public domain. No records may be classified Open without the formal approval of the CPS Manager.

By default TRIM / CM classifies all records as **Unclassified**, unless a Security Level has been applied at the BCS level. If the contents of the record fall under a different category, the record creator should change the Security to the appropriate level. If you are unsure of what Security Level a record should have, contact the Records and Information Management Coordinator for advice.

1. To change the Security Level on a record, open the **Properties** and click the **KwikSelect button** beside the **Security** field. Click the drop down and select a Security Level. Click **OK**.



11. Folders in TRIM / CM

Folders are used to contain documents and emails pertaining to the same subject matter or topic. Folders can be electronic only, or have a physical file counterpart e.g. ring binder, manila folder, etc. As mentioned in **Section 3.10**, there are two types of folders in CPS:

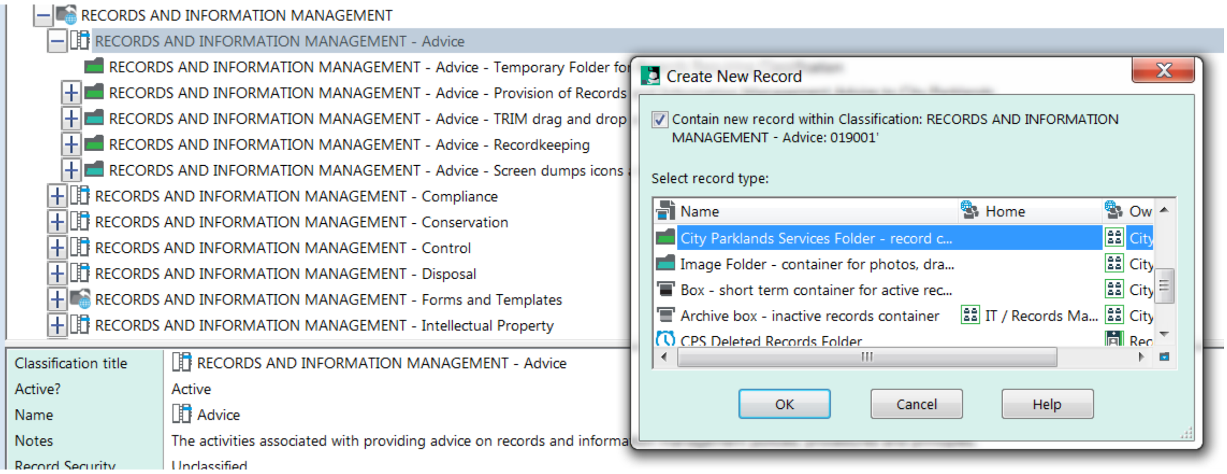
City Parklands Services Folder	Contains records that may be digital and/or physical, but limited to Documents, Images, Drawings, Multimedia objects and reference documents.
Image Folder	Contains Images and photographs in digital and / or physical format.

TRIM / CM is configured to allow Folders to contain a maximum of 200 documents. There are a number of reasons for this; but the most important from a user perspective is that large Folders become difficult to navigate and response times and certain functions can be adversely affected.

When the maximum is reached, TRIM / CM automatically closes the existing Folder and creates a new part i.e. it creates a new Folder with all the same details (apart from Date Registered and Created) and gives it the same record number with the next part number added at the end (e.g. -2, -3). TRIM / CM will also add a part number to the first Folder in the series when it closes it and creates part 2 e.g. F/19/123 will become F'19123-1.

11.1 Create a New Folder

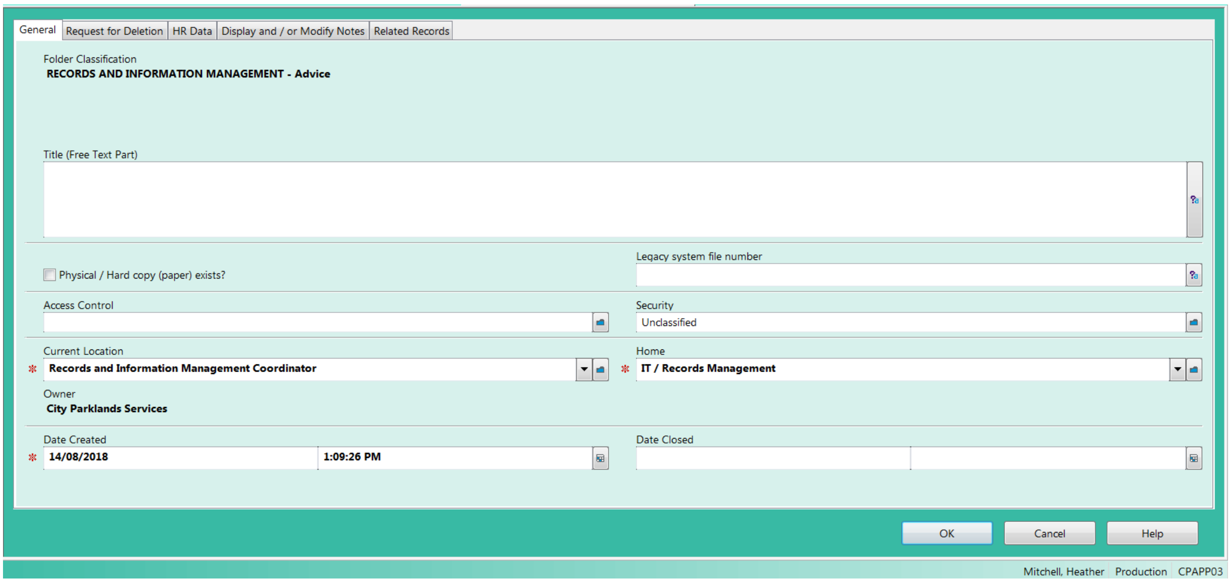
1. **Run a thorough search** in TRIM / CM to ensure the folder does not already exist.
2. Navigate through the Classification Scheme until you find the term you want to create the Folder under. Right click the term and select **New > New Record**. TRIM / CM will display a selection of record types. Select the Folder type you wish to create (generally, this will be **City Parklands Services Folder**) and click **OK**.



3. TRIM / CM will display the **New City Parklands Services Folder** profile form. You must enter information in the mandatory fields (marked with *); however, TRIM / CM will default some of this information for you. The profile form fields are explained below:

Field	Explanation
Folder Classification *	Terms from the BCS which describe the business Function, Activity and Transaction / Subject that generated this record. TRIM / CM is configured to require 2 levels of classification at a minimum.
Title (Free Text Part)	A free text field to give the Folder a meaningful title, in line with City Parklands titling standards.
Physical / Hard copy (paper) exists?	This box should only be selected if you will be making a **physical Folder** to house hard copy records.
Legacy system file number	Use this field if you are registering a Folder that was created in an old or different records system and already had a number assigned.

Field	Explanation
Access Control	The default access control for Folders is for them to be open to everyone; however, some Folders will inherit access controls from the BCS, where the content is likely to be more sensitive e.g. HR related Folders. You can amend access controls on Folders if required, and if you have the necessary permissions in TRIM. See **Section 11** for more on Access Controls and Security.
Security *	Security levels are an additional way of restricting access to sensitive information. TRIM / CM defaults Folder security to "Unclassified"; except where a specific security level has been set at the BCS level. See **Section 11** for more on Access Controls and Security.
Current Location *	TRIM / CM will automatically default to your Position. You can alter this if the Folder is physical and currently in the custody of a particular Position or you can type **<at home>** if the Folder is in storage. See **Section 6** for more on Locations.
Home *	TRIM / CM will default the Home to the Organisation or Group that your Position is attached to. It is preferable to have an Organisation or Group as a Home Location, rather than a Position. A specific User should never be a Home Location.
Owner *	TRIM / CM will default this to **City Parklands Services**.
Date Created *	TRIM / CM will default this to today's date and time; however, you are able to change this by using the calendar drop down or simply typing the applicable date and time.
Date Closed	The date the Folder was closed, due to being full or because action has not been taken on it for some time. The Date Closed is used as a trigger to calculate when the Folder can be disposed of and should be based on the date of the last record placed in it. TRIM/ CM automatically closes Folders once 200 documents have been attached to it.



4. The **Folder Classification** will automatically populate, based on the Classification term you selected. Complete the rest of the fields the fields in the **General** tab and click **OK** to complete the registration. Remember to give the Folder a meaningful title in line with the naming standards.

5. TRIM / CM will display your new Folder.

Exercise 8

1. Create a CPS Folder and:

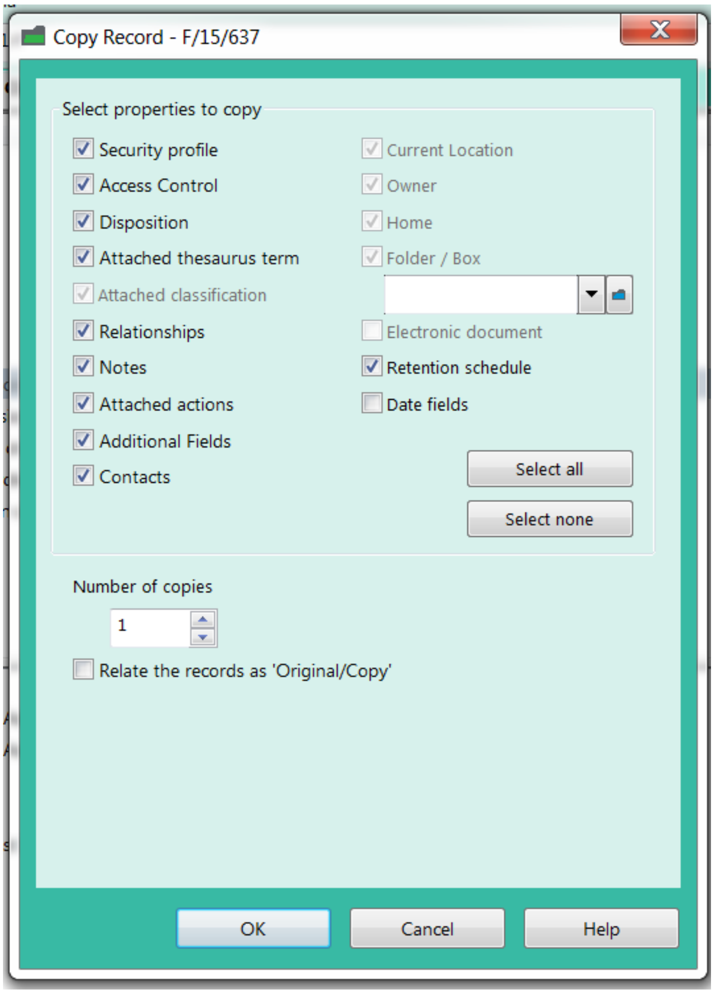
- Use the BCS terms **HUMAN RESOURCES – Learning and Development** – **Internal**.
- Title it "**TRIM / CM training for Training<enter your training number>"**
- Change all Access Controls (except Destroy) to **"TRIM / CM Training"**
- Set **Home** to "**TRIM / CM Training"**
- Set **Current Location** to **<at home>**
- Leave the **Owner** as "**City Parklands Services"**

What is the record number of your new Folder? **F/19/**_______________

11.2 Copy a Folder

If you're creating a new Folder that will have the same Classification, etc. as an existing folder, it can be easier to create a copy of the existing Folder instead of starting from scratch.

1. Right-click on an existing Folder and select **New > Copy Record**. TRIM / CM will display the **Copy Record** dialogue.
2. Ensure you untick the **Date fields** and **Notes** boxes, and any other properties you don't want copied across e.g. **Relationships**, **Access Control**, etc.
3. If you wish to create a number of Copy Folders at once, indicate the number of copies you want to make in the **Number of copies** field. Leave the **Relate the Records as 'Original/Copy'** box unticked, unless you wish to relate the original Folder to the copy (generally, not necessary). Click **OK**.



4. TRIM / CM will display your new Folder/s. It/they will have the same title as the original you copied with a (2), etc at the end. Ensure that you open the **Properties** and update the Title and any other fields as required.

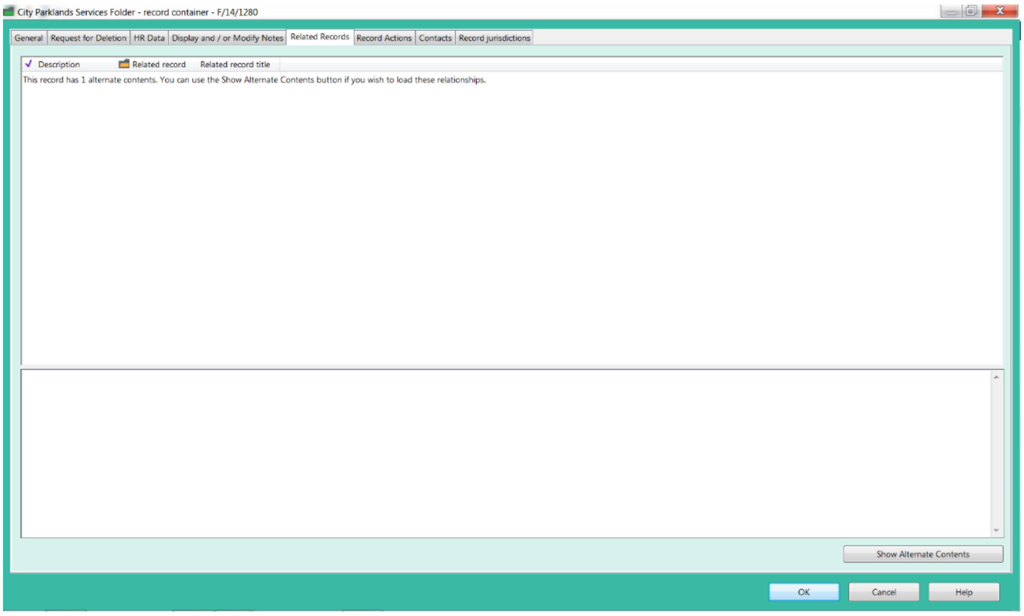
12. Relating Records

Relationships can be used to describe how different records are linked. For example, you might receive a letter with a report attached, and by relating these separate documents in TRIM, you would be able to easily identify their connection. TRIM / CM allows you to relate records in the following ways:

Relationship Type	Description
Related To	Creates a simple relationship between two or more records. This is the default.
Copy Of	Indicates that the record is an exact copy of another record.
Supersedes	Indicates that the selected record supersedes a previous record.
Attached To	For use when the record selected is attached to another record (for example, a report may be attached to a letter).
Alternatively Within	For use when you need the same record to appear in more than one container. For example, if a Project Coordinator and the Procurement Manager both need the same document in two different Folders, the **Alternatively Within** relationship would allow the same record to appear in both a project-related Folder *and* a procurement Folder. The Alternatively Within relationship can be used on both Folders and Documents i.e. you can have a Document alternatively within another Document if you wish to maintain some sort of special linkage e.g. appendices to the main Document. You can also have Folders Alternatively Within other Folders if required.
Redaction Of	Creates a relationship from the original record to a redaction of that record. (Redactions are a method of concealing sensitive information in a document and only apply to .tif and .tiff formats.)
Reply To	Indicates the record is a reply to the record in the **With Record** field.
Original Of	For use when the current record is the original of another record.
Is Superseded By	Indicates that the record has been superseded by another.
Has Attachment	Indicates that the record is attached to the record in the **With Record** field.
Alternatively Contains	Sets the containing Document or Folder record as an alternative container for the related record.
Was Redacted To	Indicates that the record's attached electronic document was redacted to the record in the **With Record** field.
Has Reply	Indicates the record in the **With Record** field is a reply to the current record.
Latest Part Of	Sets the selected record as the latest part of a series. This usually refers to container records that have multiple parts. This relationship is available even if the record type does not allow new parts.
Later Version Of	Indicates that the record is a later version of another record. When this option is selected, the related record will be related as an earlier version of the current record.

12.1 Viewing Related Records

1. Right click on the record and select **Properties**. Navigate to the **Related Records** tab. You can view related records here or add or remove record relationships. **Note:** If there are records which have been related as **Alternatively Within** to this record, you will need to click the **Show Alternate Contents** button to see them.



When a record is related to another, both records will be updated with the relevant relationship type. For example, if you relate Record X as 'related to' Record Y, Record Y will inherit the relationship 'related to' Record X.

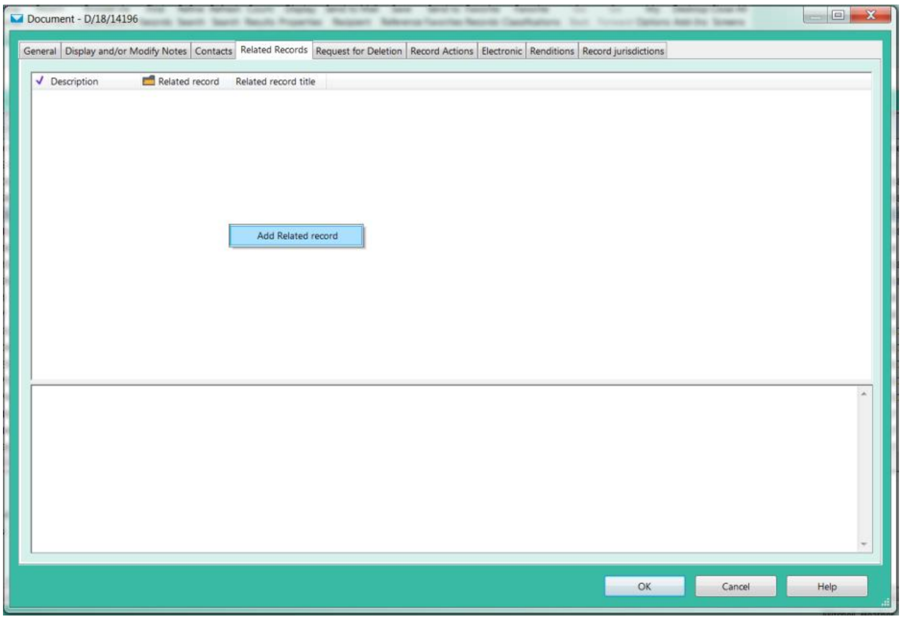
2. To navigate to related records from a record displayed in a search or list, right-click it and select **Navigation > All Related Records**.

3. You can also expand a Folder using the **+** sign to see records which have been placed **Alternatively Within** it.

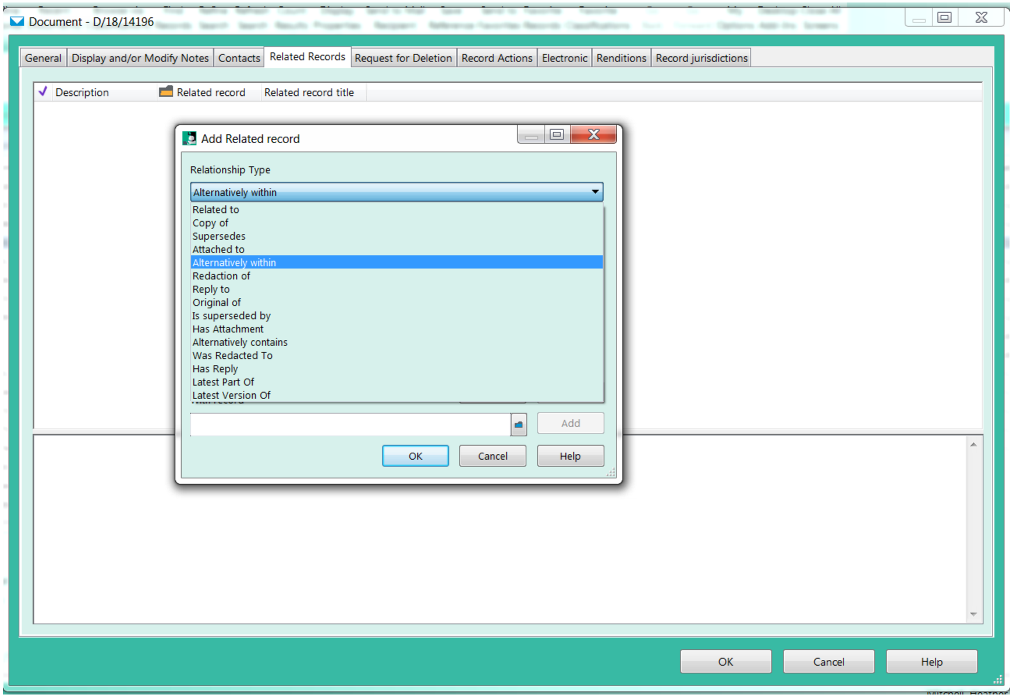
4. If you see a Document in the List Pane with a **+** sign beside it, this indicates that it has another Document or Documents related Alternatively Within it.

12.2 Adding a New Relationship

1. Open the **Properties** of the record. Click on the **Related Records** tab, then right-click in the top pane and select **Add Related Record**.

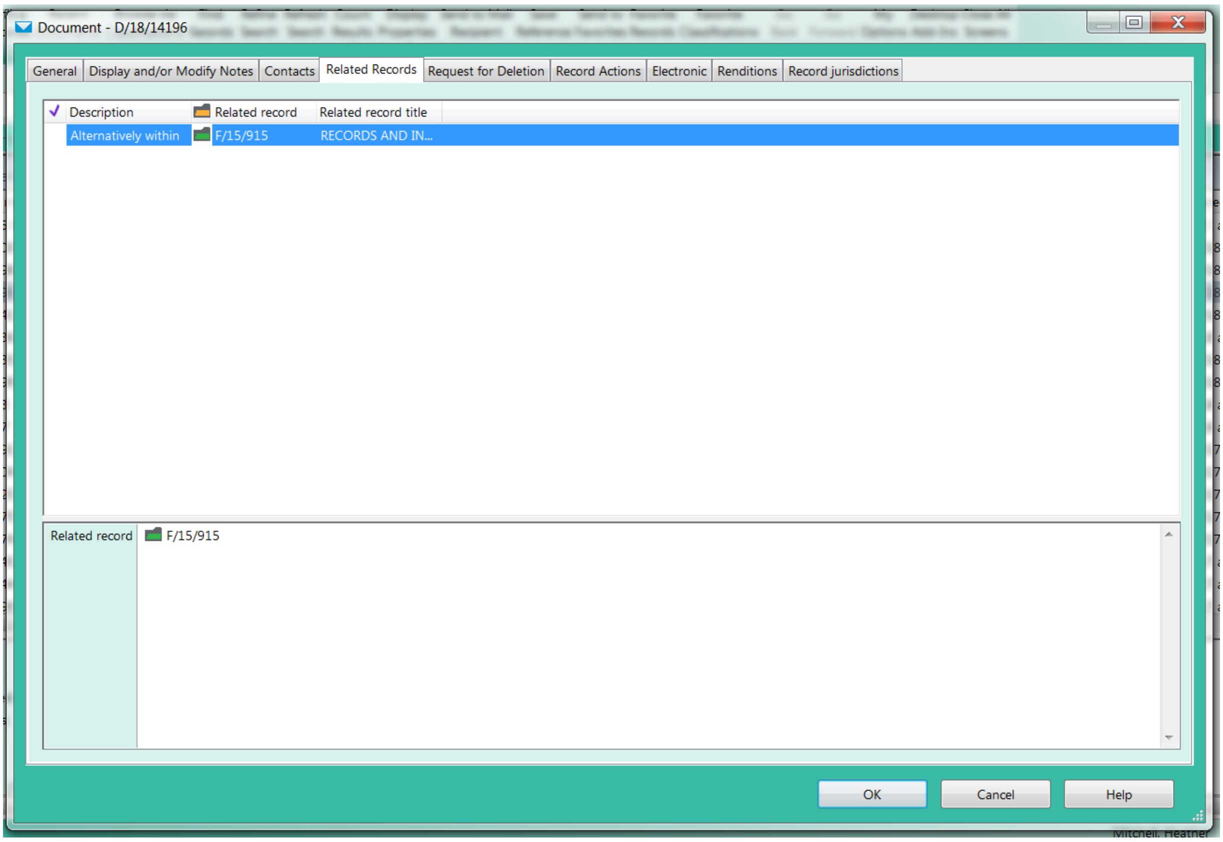


2. TRIM / CM will display a list of relationship types to choose from. In the example below, we will place a Document **Alternatively Within** a Folder. Click the **Alternatively Within** option.



3. TRIM / CM will ask you to to nominate a record or records to relate. Either type the number of the record you wish to relate to in the **With Record** field or click the **KwikSelect** button beside the field to search for and select the relevant record. Click the **Add** button if you wish to relate more than one record. Click **OK** to complete.

4. TRIM / CM will display the related record and the relationship type. Click **OK** to complete.



5. To remove a relationship, open the **Properties**, navigate to the **Related Records** tab, highlight the relevant related record, right click and select **Delete Related Record**. Click **OK** to finish. **Note**: selecting this option will delete the relationship, not the record itself.

Using the **Alternatively Within** relationship does not affect the security or access controls on a record. The record will always take its security from its primary Folder, in the case of a Document, or from defaults set in the Classification Scheme for a Folder. The **Alternatively Within** relationship cannot override this.

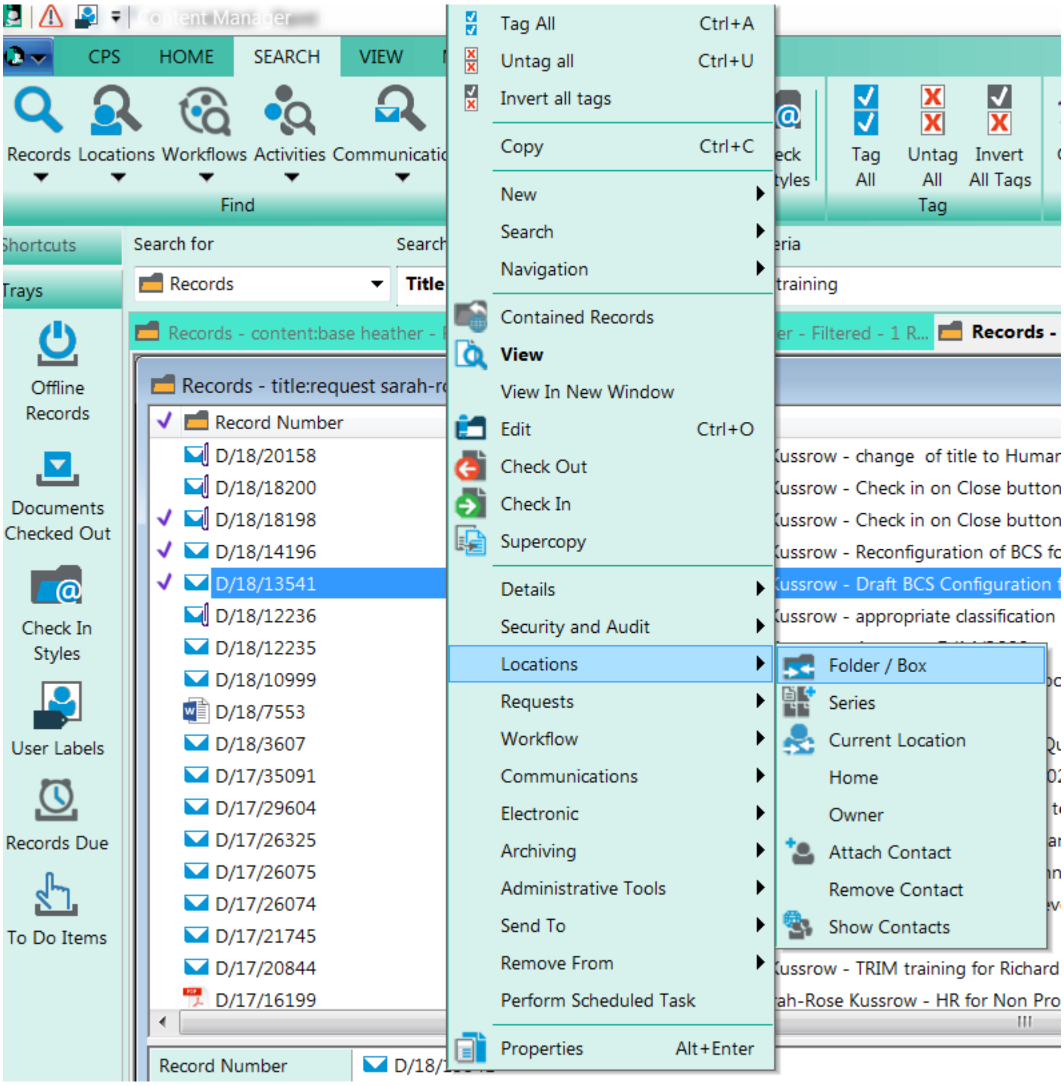
13. Moving Documents between Folders

Occasionally, you may need to move a document or documents from one Folder to another.

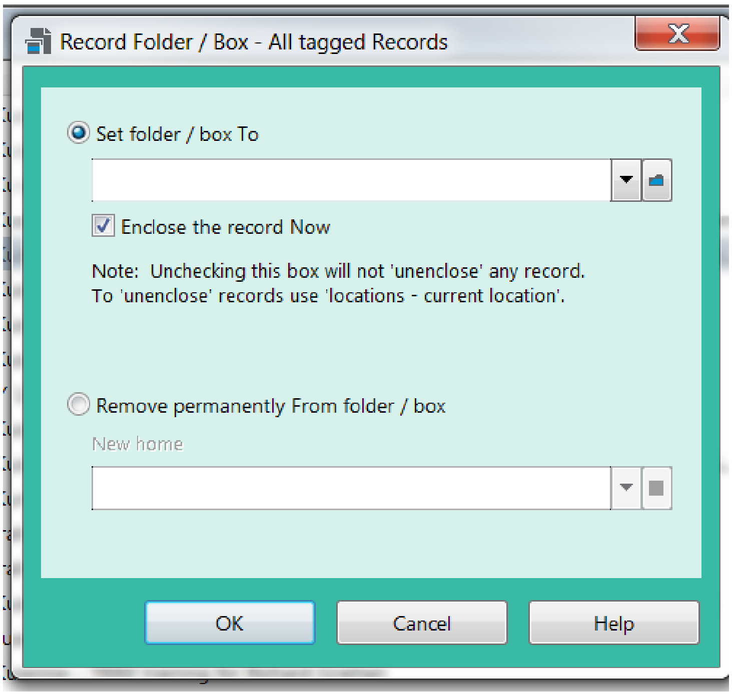
For individual documents, the simplest way to do this is by changing the Folder number in the **Folder / Box** field, via **Properties**.

1. Open the Document's **Properties**.
2. Type the new Folder number into the **Folder / Box** field, or use the drop down to select a Folder that you've worked with recently, or click the **KwikSelect** to locate the Folder you wish to place the document on. Click **OK** to complete.

3. To move multiple documents to a different Folder, locate the documents, and tag them. Right click and select **Locations > Folder / Box**.



4. When TRIM / CM prompts, ensure the **All Tagged** Rows option is selected and click **OK**.
5. TRIM / CM will display the **Record Folder / Box – All Tagged Records** dialogue.



6. Type the Folder number into the **Set folder / box to** field, or use the drop down to select a Folder that you've worked with recently, or click the **KwikSelect** to locate the Folder you wish to place the document on. Leave the **Enclose the record Now** box ticked, then click **OK** and then click **Yes to All**. The Documents will be moved to the specified Folder.

IF TRIM / CM prevents you from moving documents to a new Folder, this may be due to Access Control permissions. Check the Access Controls on the target Folder to see if you are able to contribute contents and contact the Records and Information Management Coordinator for advice and assistance.