

**The '*Search, Tag and Do*'
TRIM Training Handout
For
Ministry of Forests' END USERS**

(Based on Info Workers Draft Version 08.1)

July 6, 2004

EDS Victoria

**EDS Canada West Solution Centre
710 Redbrick Street
Victoria, BC V8T 5J3
Canada**

Amendment History

CR# (optional)	Document Release #	Date	Modified By	Section, Page(s)and Text Revised
	0.1	Feb. 13-04	Freda Wilson	Original
	0.2	Mar. 22-04	Freda Wilson	Updates based on test run at MOF
	0.3	Mar. 31-04	Freda Wilson	Updates based on 2nd test run at MOF
	0.4	Apr. 16-04	Freda Wilson	Updates based on notes and information from MOF
	0.5	April 30-04	Dave Young	Minor updates made.
	0.6	May 13-04	Freda Wilson	Minor updates based on request from MOF
	0.7	June 11-04	Freda Wilson	Minor updates based on request from MOF and added Index
	0.8	June 23-04	Freda Wilson	Minor updates based on request from MOF
	0.81	July 5 04	Dave Young	Minor changes to 6.7

Approval History

Release #	Approved By	Title of Approver	Approval Date	Comments
1.0	Ann Cummings	Ministry Records Officer		

Manual Conventions

The pages that follow describe how information in this manual is presented. The manual has been organized into seventeen chapters, each dealing with a specific topic including an Index:

- Chapter 1 provides a Course Overview
- Chapter 2 explains what TRIM Context™ is. As well, it gives you a quick tour of the TRIM Menus and how to customize the display in TRIM.
- Chapter 3 explains demonstrates how to Search for and Create Records.
- Chapter 4 deals with how to use the Reports function to Print Labels.
- Chapter 5 explains how Record Requests are handled in TRIM Context™.
- Chapter 6 covers Record Maintenance including how to create a New Part to a file.
- Chapter 7 covers Disposition Management including culling records and how to transfer records to Onsite and Offsite Storage Facilities.
- Chapter 7 demonstrates how to generate various types of reports in TRIM Context™.
- Chapter 8 explains how to create and modify External Locations.
- Chapter 9 demonstrates how to search for records using a core group of the various Search Methods available.
- Chapter 10 demonstrates how to save frequently used Searches.
- Chapter 11 deals with the Favorites shortcut bar and how to add saved searches and classifications to Favorites.
- Chapter 12 lists some useful Short-cut Keys to know.
- Chapter 13 describes some Troubleshooting Tips for topics covered in chapters 3 - 11.
- Chapter 14 lists whom to call for help.
- Chapter 15 provides a Glossary of Terms.
- Chapter 16 provides an Index.
- Chapter 17 (Appendix A) provides the answers to the Chapter Questions

Typographical Conventions

Throughout this manual, **boldface** has been used for emphasis. Bold may also be used to highlight menu names or menu options, as in:

Choose **File|Save Record**.

Italics have been used to indicate titles and terms with which you may not be familiar. Italics may also be used to identify dialogue boxes or their elements, as in:

In the *Open* dialogue box, click *OK*.

In the exercise instructions, anything you are asked to type appears in the Century Gothic font.

Concepts

When a new topic is introduced the concepts will be described prior to being asked to complete an exercise. Concepts are listed in a step-by-step format and are lettered such as, A, B, and C etc. An example will look like the following:

Searching for a Record:

- A. In TRIM Context™ select from the menu **Search|Find**.
- B. A search dialogue will appear. Select the Search Method you wish to search by and fill in the desired search criteria and click *OK*.
- C. Select the record you wish to review.

Exercise Instructions

Hands-on exercises are interspersed throughout this manual. They are presented in a step-by-step format and will be numbered such as 1, 2, and 3, etc. An example will resemble the following:

Exercise 1

Searching for a Record

1. Choose **Search|Find Records** from the Menu at the main Context screen.
2. Choose **Title Word** as the type of search.
3. Type the word: Training and click *OK* to begin the search.

Questions

At the end of each chapter there will be a set of questions to test your knowledge of that topic. These will be presented in a numbered format similar to the exercises. The questions will be a combination of multiple choice, true/false as well as descriptive answers. This will help you determine whether you need to review a particular area of that topic.

Answers to all of the questions are listed at the back of the manual in **Appendix A**.

Alternative Methods of Performing a Command

TRIM Context™, like most Windows programs, offers several ways to execute a command, allowing you to use the program in the way that is most comfortable for you. Where appropriate, this manual will show you the menu, keyboard, and toolbar methods for accomplishing a task. For example, to find records in TRIM, use any of the following methods:

Toolbar:



Keyboard:

[Ctrl][F]

Menu:

Search|Find Records

Keystrokes

Keyboard commands using two or more keys in combination will be shown as follows:

[Ctrl][C]	Hold down the first key, tap the second key
[Ctrl][Shift][L]	Hold down the first two keys, tap the third key
[Alt],[F]	Press and release the first key, press and release the second key

Table of Contents

1. Course Overview	1-5
1.1 Intended Audience	1-5
1.2 Purpose.....	1-5
1.3 Prerequisites.....	1-5
2. Introduction - A Tour of TRIM.....	2-1
2.1 Objectives	2-1
2.2 What is TRIM Context™?	2-1
2.3 Launching TRIM Context™	2-1
2.4 Changing the Dataset in TRIM	2-2
2.5 The TRIM Menu System	2-5
2.6 Parts of a TRIM Dialogue Window	2-8
2.7 How Things Look in TRIM Context™	2-9
2.7.1 Title Bar	2-9
2.7.2 List Pane.....	2-9
2.7.3 View Pane	2-10
2.7.4 Typical TRIM Dialogue Box	2-10
2.8 Customizing TRIM	2-12
2.9 User Configuration.....	2-12
2.10 List Pane.....	2-16
2.10.1 Modifying the Information Displayed	2-16
2.10.2 Modifying the Format of the display:	2-19
2.11 The View Pane	2-21
2.11.1 Customizing the View Pane	2-21
2.12 Records Work Tray.....	2-23
2.13 Adding Records to the Work Tray	2-23
2.14 Accessing Records in the Work Tray	2-24
2.15 Questions.....	2-25
2.16 Summary	2-26
3. Records.....	3-1
5. Record Requests.....	4-1
5.1 Objectives	4-1
5.2 How Do I Submit Record Requests?	4-1
5.3 How Do I Process a File Folder Request?	Error! Bookmark not defined.
5.3.1 Litigation Requests	Error! Bookmark not defined.
5.4 How are Record Requests Processed?	Error! Bookmark not defined.
5.5 How Do I Find Records that are Due Back?.....	Error! Bookmark not defined.
5.6 Removing a Request	Error! Bookmark not defined.
5.7 Questions.....	Error! Bookmark not defined.
5.8 Summary	Error! Bookmark not defined.
8. Locations.....	5-1
8.1 Objectives	5-1
8.2 Understanding Locations	5-1

8.3 User Roles	5-5
9. Searches	6-1
9.1 Objectives	6-1
9.2 Different Search Methods	6-1
9.3 Search Values.....	6-2
9.4 Search Filters	6-2
9.5 Sorting a Search	6-3
9.6 How to Perform a Search.....	6-6
9.7 Count.....	6-9
9.8 Refining a Search.....	6-9
9.9 Quick Find	6-10
9.10 Advanced Searching	6-10
9.11 Other Advanced Features.....	6-12
9.12 Other Search Functions.....	6-12
9.13 How Do I Search for Records?	6-14
9.14 Questions.....	6-21
9.15 Summary	6-22
10. Saving Searches.....	7-1
10.1 Objectives	7-1
10.2 Accessing a Saved Search.....	7-2
10.3 How Do I Save Searches?.....	7-3
10.4 Questions.....	7-4
10.5 Summary	7-5
11. Favorites.....	8-1
11.1 Objectives	8-1
11.2 Adding a Search to Favorites	8-1
11.3 How Do I Add Classifications to Favorites?	8-3
11.4 How Do I Remove Classifications from Favorites?	8-5
11.5 Questions.....	8-7
11.6 Summary	8-8
12. Shortcut Keys	9-1
12.1 Objectives	9-1
13. Tips and Tricks	10-1
13.1 Prefix Search	10-1
13.2 Tab Bar	10-1
13.3 Drag and Drop.....	Error! Bookmark not defined.
13.4 Set Assignee.....	Error! Bookmark not defined.
14. Whom Do I Call for Help?	11-1
14.1 TRIM Help.....	11-1
14.2 Records Help.....	11-1
14.3 Computer Help.....	11-1
15. Glossary of Terms and Acronyms.....	12-1
16. Index.....	13-1
17. Answers to Chapter Questions	14-1
17.1 Section 2 – Introduction - Taking the TRIM Tour	14-1

17.2 Section 3 – Creating Records.....	14-1
17.3 Section 4 - Printing Labels.....	14-2
17.4 Section 5 - Record Requests	14-2
17.5 Section 6 - Record Maintenance	14-3
17.6 Section 7 - Disposition Management.....	14-4
17.7 Section 8 - Locations	14-4
17.8 Section 9 – Searches	14-5
17.9 Section 10 - Saved Searches	14-6
17.10 Section 11 – What are Favorites?	14-7

1. Course Overview

Today government offices, corporations and businesses of all descriptions are becoming increasingly aware of the need to keep and maintain accurate records of transactions that take place during the course of business. Offices use many forms of document and records management to achieve these results. This course presents the basic features of TRIM that a typical Information Worker needs to perform day-to-day records management functions.

1.1 Intended Audience

This course is designed for Ministry of Forests records management staff who will be creating and maintaining records of business transactions in TRIM Context™.

1.2 Purpose

The goal of this course is to provide an understanding of the records management features of TRIM Context™ and how it integrates with desktop applications. Participants will learn how to create, search for and maintain records in TRIM Context™.

1.3 Prerequisites

Attendees should be familiar with records management principles and should be comfortable working in the Windows environment. Keyboarding ability is also necessary.

2. Introduction - A Tour of TRIM

2.1 Objectives

In this Chapter you will learn:

1. What is TRIM Context™?
2. The different Menu Options.
3. How to launch the program.
4. How to modify the List and View Pane screens.

Following completion of this chapter you will understand what is TRIM Context™, launch the application and know the different parts of a TRIM Context™ window and how to modify the display of information. You will also be able to test your knowledge of this topic by answering the questions at the end of this chapter.

2.2 What is TRIM Context™{ XE "TRIM:What is TRIM Context" }?

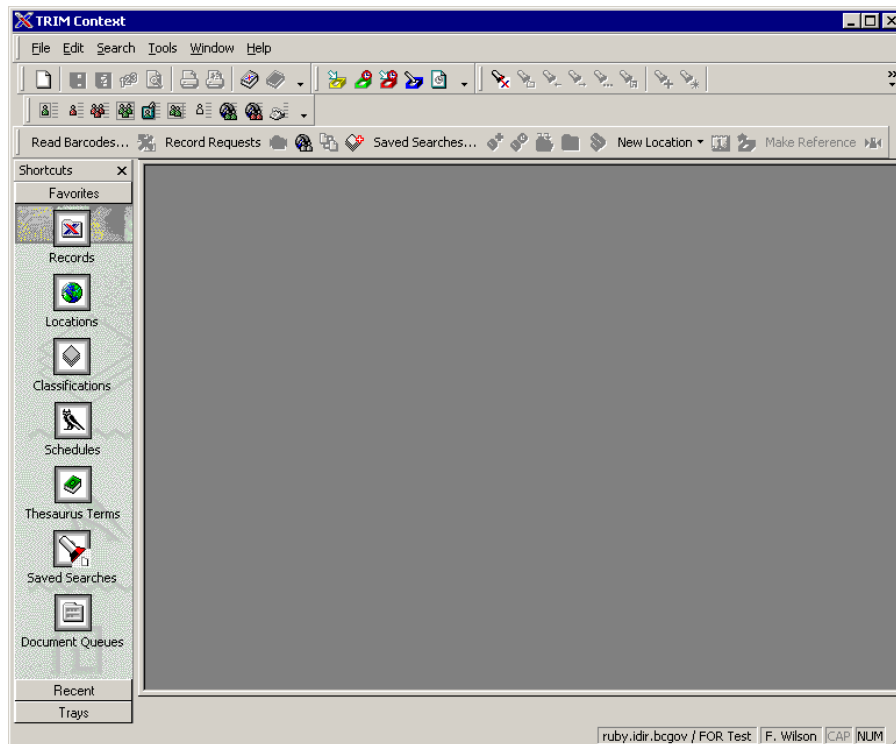
TRIM is an integrated Enterprise Document and Records Management System (EDRMS) capable of managing the full range of corporate information. The Ministry of Forests has chosen to use TRIM Context™, which the Government of British Columbia has selected as the standard tool to help manage the government's records.

From electronic documents and records, through content management, to the management of physical records and documents, TRIM Context™ provides all the necessary functionality in a single off-the-shelf software application.

2.3 Launching TRIM Context™{ XE "TRIM:Launching TRIM Context™" }



When TRIM Context™ is installed on your PC, the TRIM Context™ icon will appear on the desktop. Double-click this icon to launch the TRIM Context™ application.



Basically when you work in TRIM Context™ you will be searching for records, tagging records and then executing the specific function that you want to do with those records. For example, you may want to print a specific kind of report so you would begin by searching for certain records, tagging them and then sending them to a particular type of report to be printed.

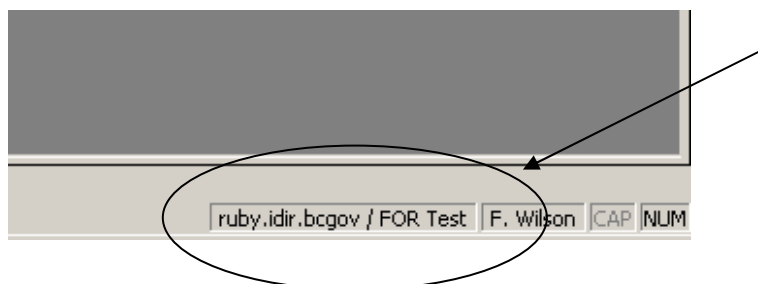
There are two other TRIM icons that are related to the filing of electronic records. These will not be covered during this course. We will address the filing of only physical records.



2.4 Changing the Dataset in TRIM{ XE "TRIM:Changing the Dataset in TRIM" }

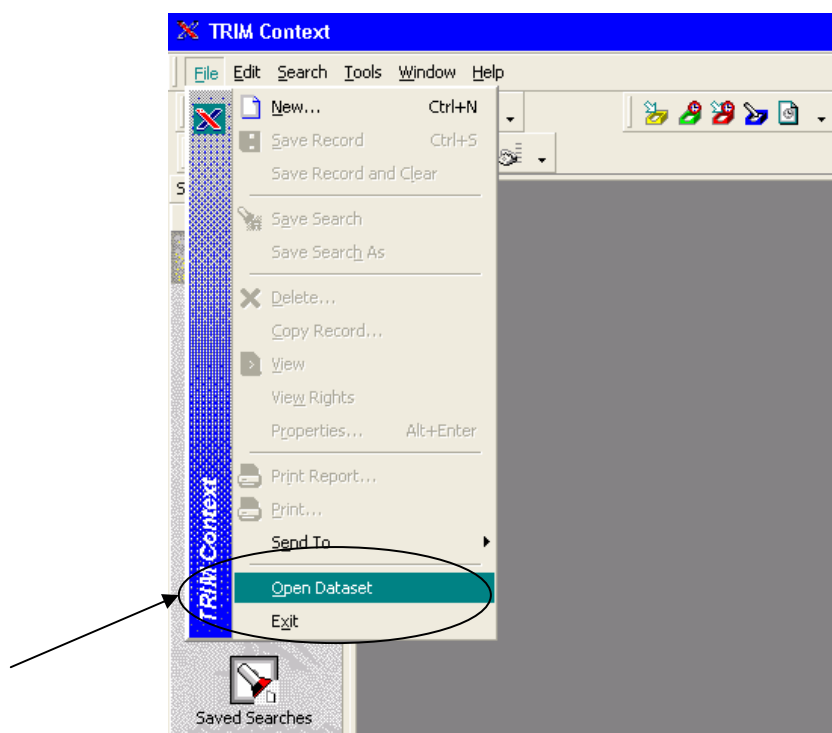
When you launch TRIM Context it will advise you that it is accepting connections to the default dataset. The dataset is the repository where records are stored. Initially, you may be working in the TRIM FOR Test dataset to test the functions of TRIM while learning the application. Once you feel comfortable enough with using TRIM you will want to create records in the production dataset.

TRIM always identifies which dataset you are using by displaying it on the status bar at the bottom right of the screen.

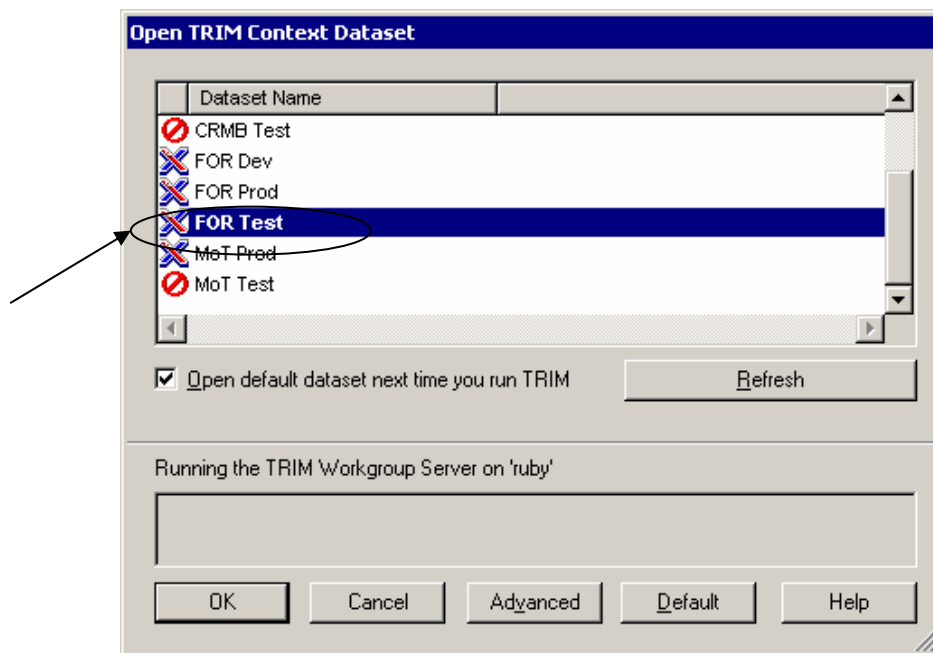


The basic steps to change the dataset are:

- A. Select **File|Open Dataset** from the Menu.



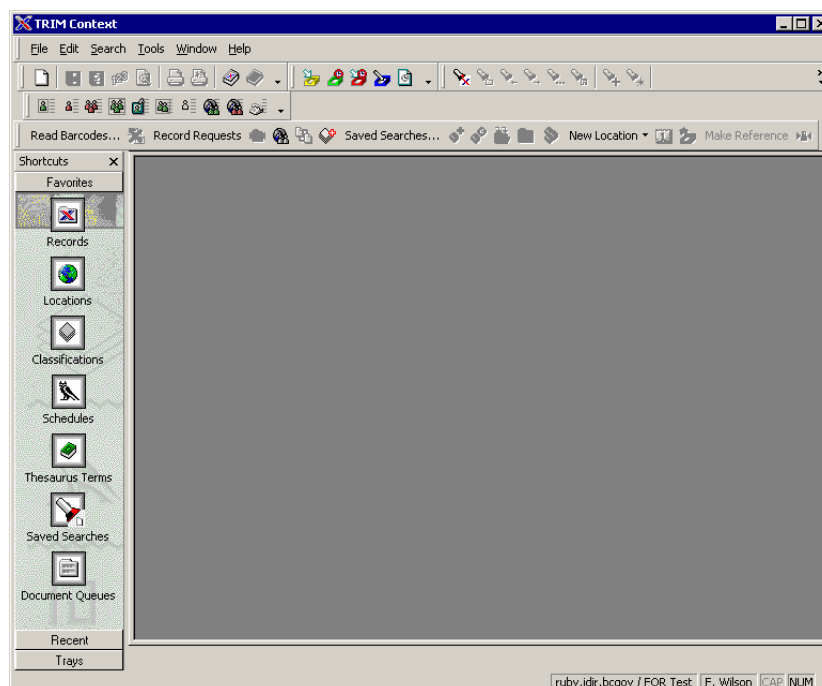
B. Select the **Dataset** from the list displayed.



C. Click **OK** to proceed.

Note: Click the **Default** button to make this dataset the default each time you launch TRIM Context.

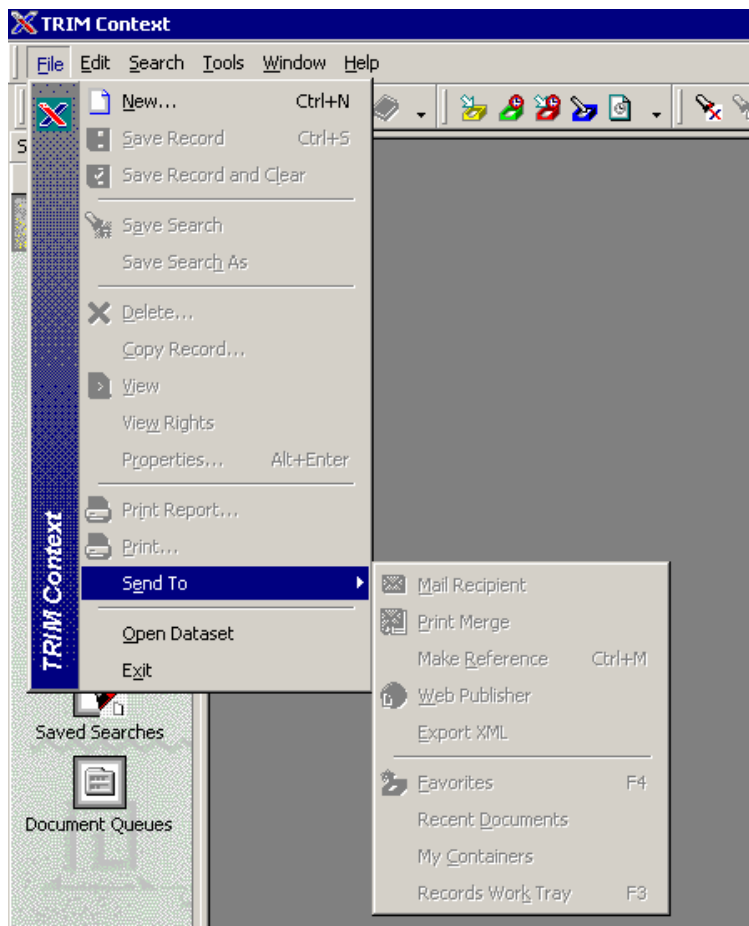
The main TRIM Context screen will be displayed.



2.5 The TRIM Menu System

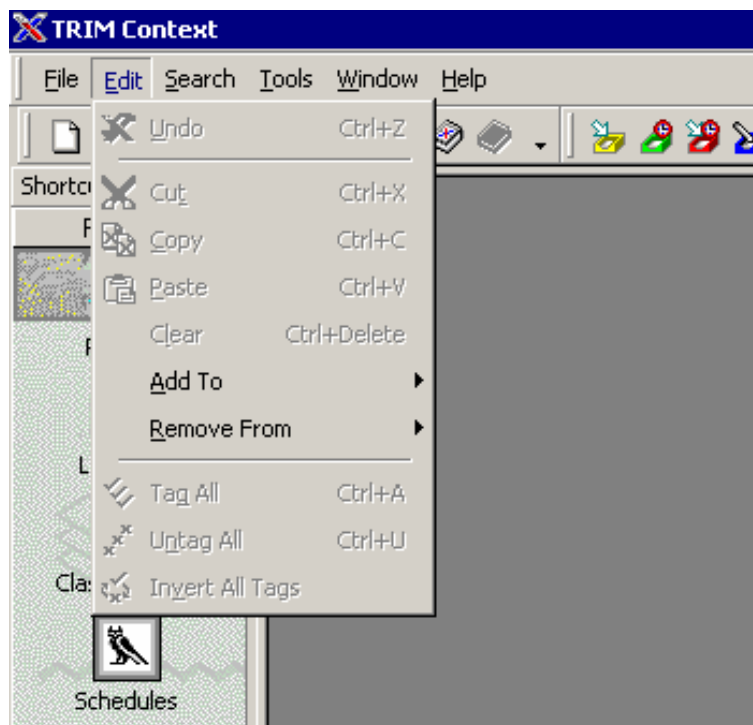
The File Menu{ XE "TRIM:File Menu" }

The File Menu offers a number of options depending on what you are doing in TRIM. You can create/save a new record or view the properties of a record from this menu. Options that appear on a menu in black text are available and those grayed out are not available at that point in time. Items that have an arrow pointing to the right will have a sub-menu of choices available. This is referred to as cascading menus.



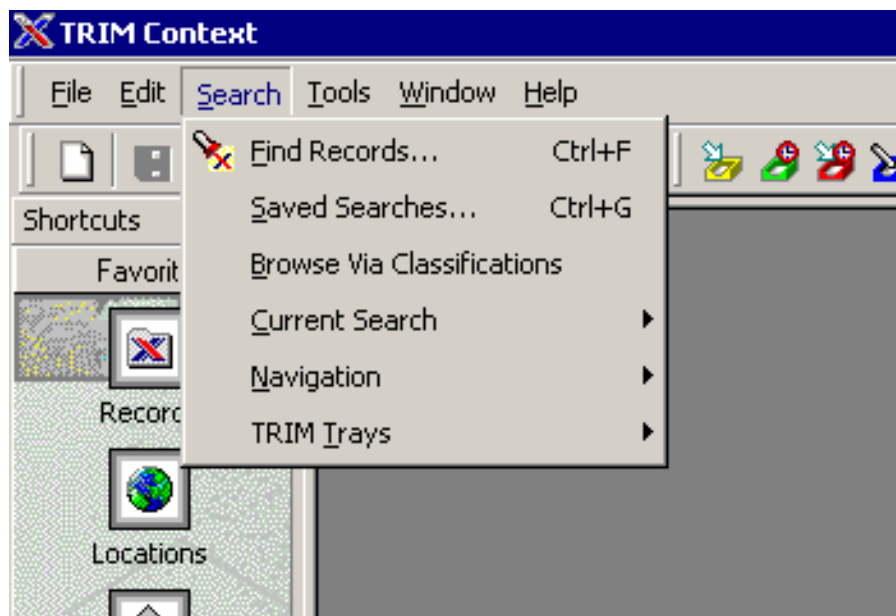
The Edit Menu{ XE "TRIM:Edit Menu" }

The Edit Menu provides editing functions such as cut, copy, paste, etc., when you are working with records.



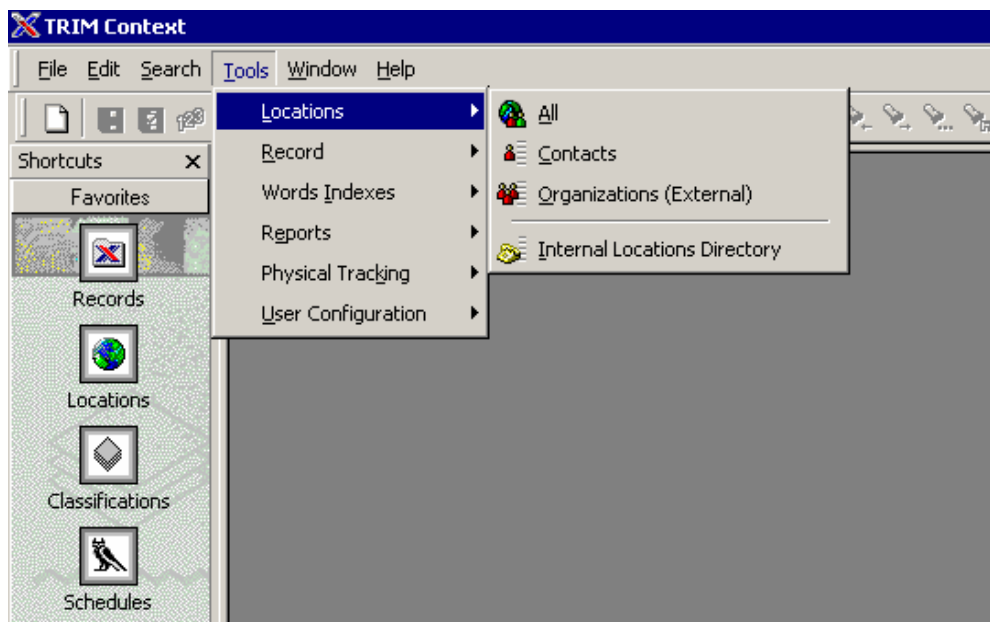
The Search Menu{ XE "TRIM:Search Menu" }

The Search Menu provides various search functions such as find records, save searches, and uses the different tray options.



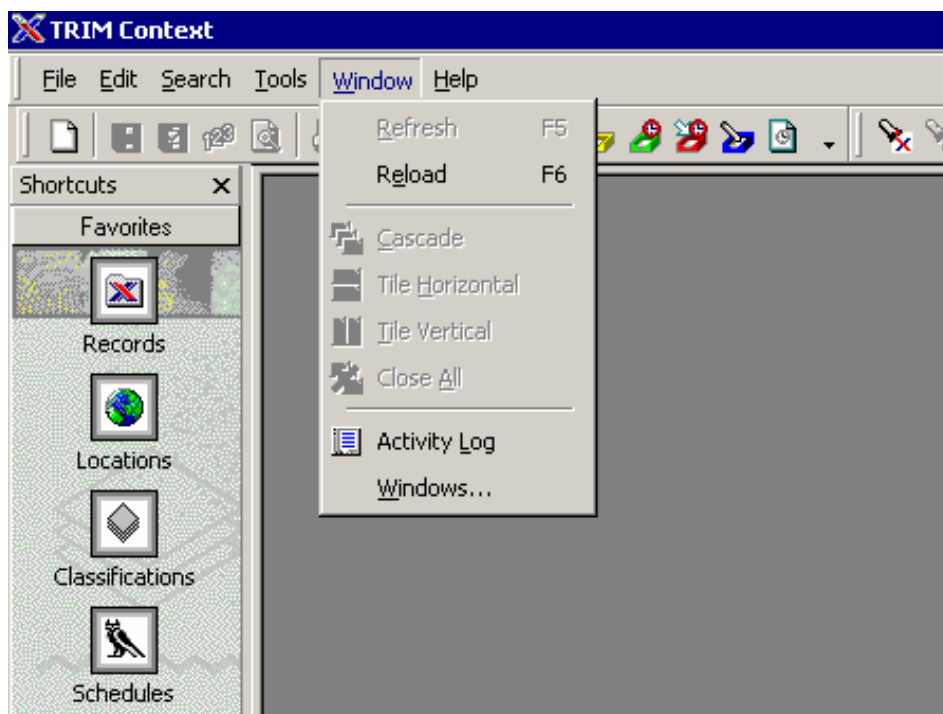
The Tools Menu{ XE "TRIM:Tools Menu" }

The Tools Menu provides a list of items that access different functions such as locations, record classifications and requests, as well as reports, just to name a few



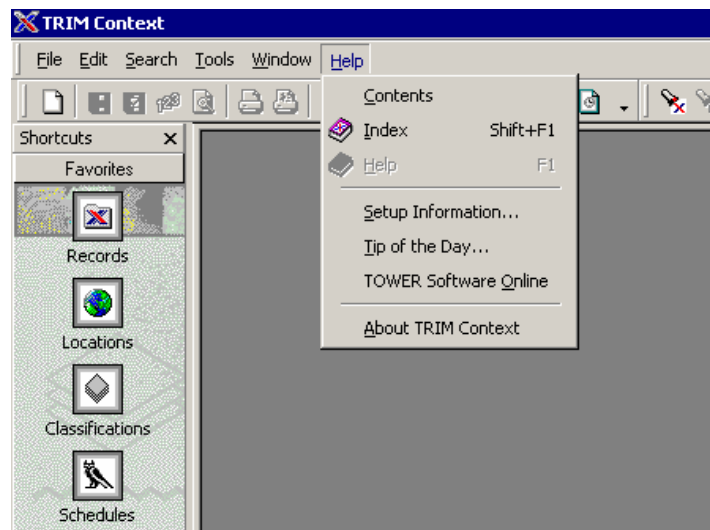
The Window Menu{ XE "TRIM:Window Menu" }

The Window Menu allows you to navigate amongst windows that you have open, change how they will appear as well as refresh the contents of a window, etc.



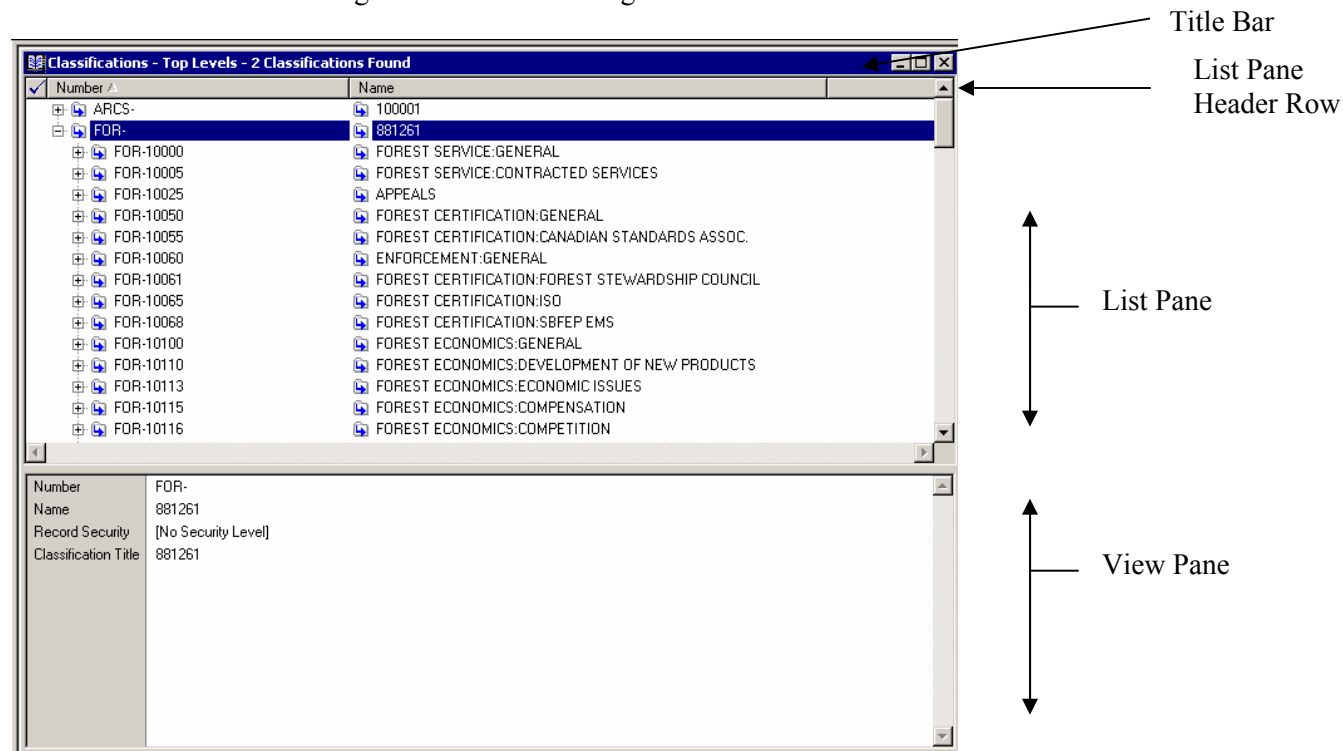
The Help Menu{ XE "TRIM:Help Menu" }

The Help Menu provides access to the TRIM Context online help. Context sensitive help is also available from within many of the dialogue boxes.



2.6 Parts of a TRIM Dialogue Window{ XE "TRIM:Parts of a TRIM Dialogue Window" }

The dialogues in TRIM Context™ are the same as any other Dialogues application. They can be maximized and minimized. All Dialogues in TRIM have a right click menu. In general all of the TRIM Context™ dialogues have the following elements:



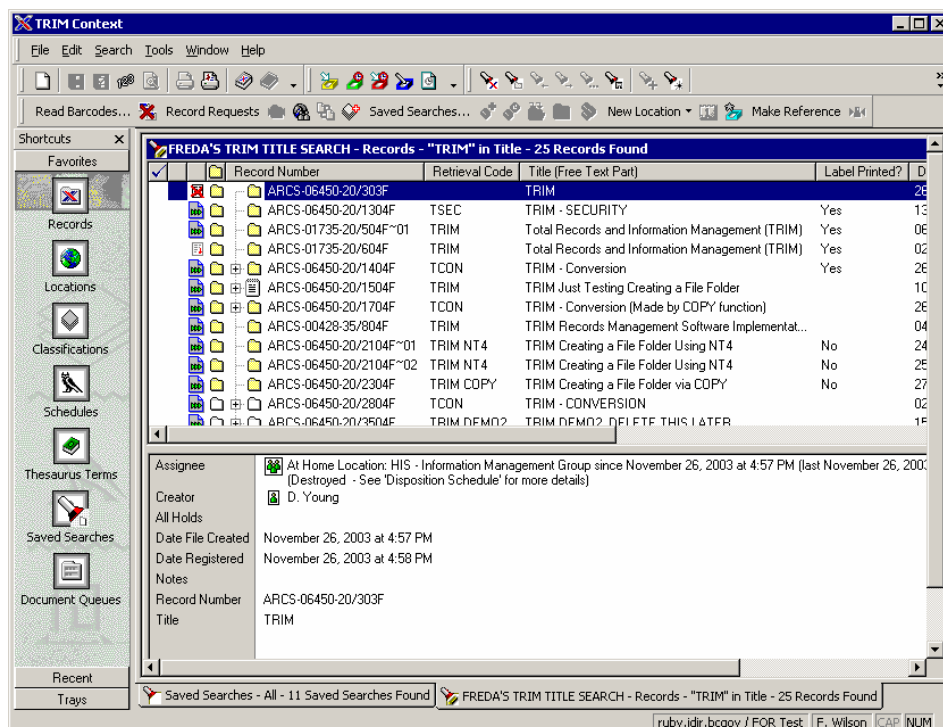
2.7 How Things Look in TRIM Context™

2.7.1 Title Bar{ XE "TRIM:Title Bar" }

The Title Bar will indicate which window or dialogue you have opened. It will also display any filtering that has been applied. A list can be filtered to display information that matches certain criteria. If 'All' appears in the Title Bar, then no filter has been applied and TRIM Context™ is displaying all available information. The Title Bar may display the number of items in a list. If this does not automatically appear you can count or sort the list and the number of items will be displayed.

2.7.2 List Pane{ XE "TRIM:List Pane" }

The List Pane displays entries that are relevant to the Dialogue box that has been opened. The information in the List Pane has been divided into Columns. The List Pane Header Row shows the names of the fields that are being displayed in the List Pane. The scroll bar at the bottom of the List Pane will enable you to scroll through horizontally the columns that are currently being displayed. The scroll bar on the right hand side of the List Pane will enable you to scroll vertically through the entries.



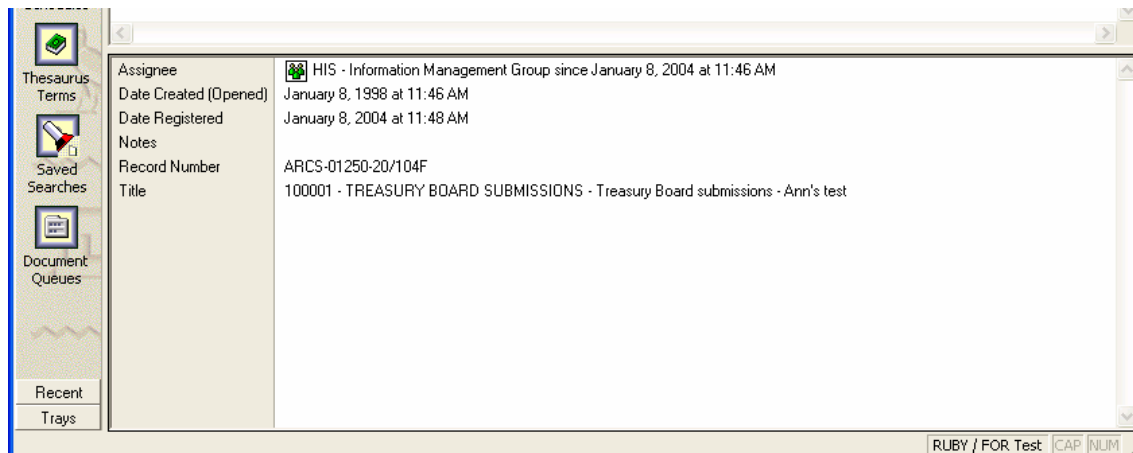
2.7.2.1 Columns Sort Order

If you left click on a column heading, TRIM will automatically sort the list pane in alphanumeric order according to the column selected. The sort can be in descending or ascending order. Each time you click, TRIM will reverse the order. A small gray triangle will appear in the Column to indicate the sort order.

Title ▲	Title ▼
Sorted Ascending Order{ XE "Sorting:Ascending Order" }	Sorted
Descending Order{ XE "Sorting:Descending Order" }	

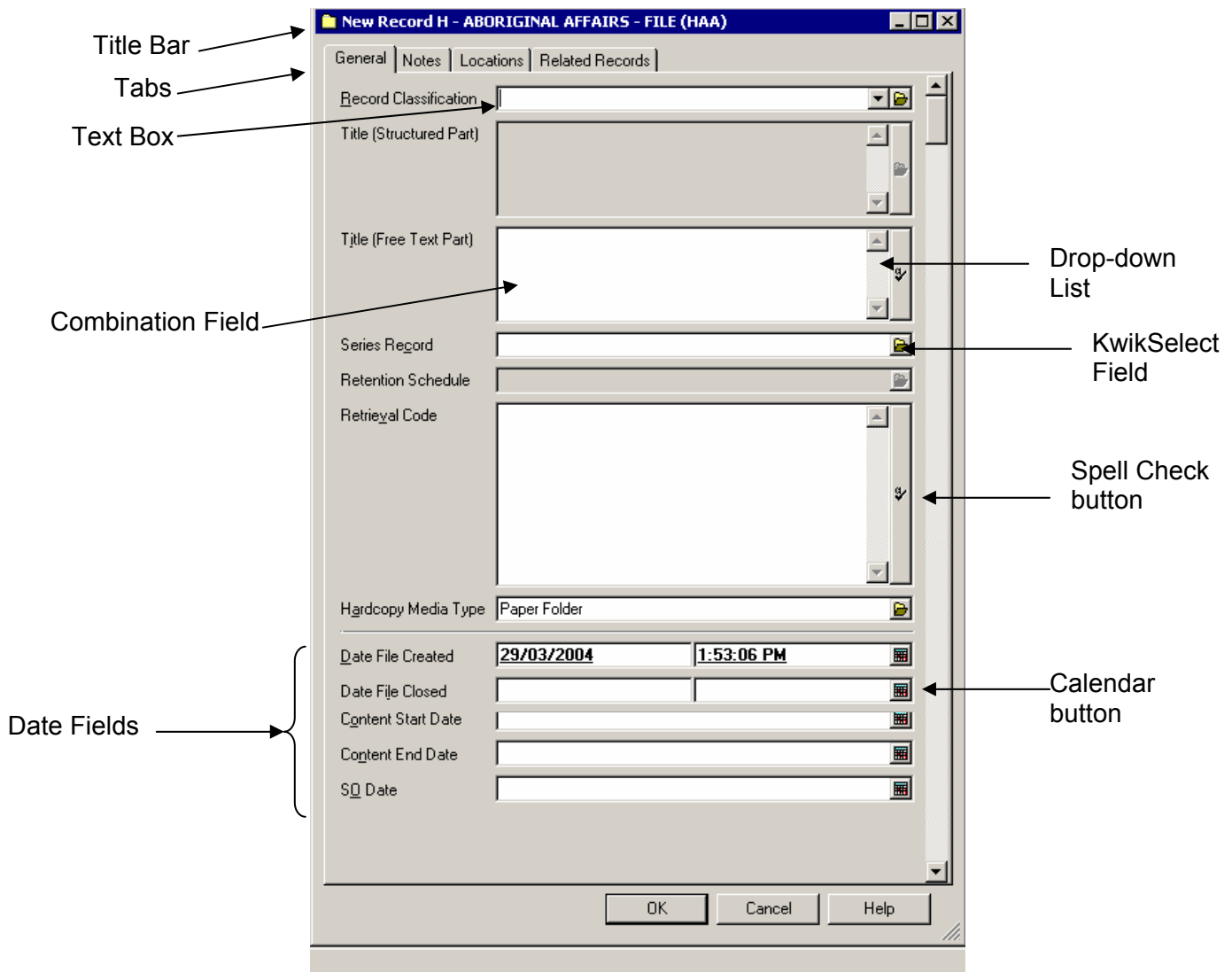
2.7.3 View Pane{ XE "TRIM:View Pane" }

The View Pane displays specific information about the currently selected item. The Scroll Bar will enable you to see all information in the View Pane when there are more fields than the view pane can display.



2.7.4 Typical TRIM Dialogue Box{ XE "TRIM:Dialogue Box" }

A dialogue box is what is used to enter data into TRIM. Some Dialogue Boxes cannot be maximized or minimized.



Title Bar: All dialogue boxes will display their title. This will be the name of the current dialogue, which is related to the function you are performing.

Tabs: Many TRIM dialogue boxes use a Tabular Format. That is, information will be displayed on different pages that are accessed via a tab. To open the page, click on the tab.

Text box Where data is entered or modified.

Spell Check: Launches TRIM's Spell Check Facility.

Date Fields: Times and dates can be entered into Date fields. The first part of a date field is where you enter the Date. The date must be entered in a numeric format with a separator of a dash (-) dot (.) or slash (/). The second part is where you enter a time. Times can be entered in either a 12-hour or 24-hour format. A colon is used to separate the hours from the minutes. If using 12-hour time format, ensure that you enter AM or PM.

Calendar button{ XE "TRIM:Calendar button" }: Date Fields will normally have a Calendar button. This button will display a calendar from which you can select a date. The Calendar button will also enable you to access the Date meta-variables. These meta-variables include today, yesterday, this week, last week, and next week, etc.

Drop-down lists{ XE "TRIM:Drop-down lists" }: Lists the most recently used selections for the current field. Click the ▼ arrow to view the choices.

KwikSelect field{ XE "TRIM:KwikSelect field" }: A KwikSelect field will only allow you to enter pre-existing information. You can type directly into the field or click the KwikSelect button to pick from a list.

Combination Field{ XE "TRIM:Combination Field" }: The Combination Field will display both a KwikSelect button and a Drop-down button. The KwikSelect button behaves normally. The Drop-down button will reveal a list of your most recently used selections.

Checkboxes{ XE "TRIM:Checkboxes" } Are used to state whether the field is *true* or *false*.

Option buttons{ XE "TRIM:Option buttons" } Also known as Radio buttons, these are used to select or clear options where only one option can be enabled at a time.

OK button{ XE "TRIM:OK button" }: Is used to execute a command using the data currently entered in the dialogue box.

Cancel button{ XE "TRIM:Cancel button" }: Closes the dialogue box without executing the command.

Help button{ XE "TRIM:Help button" }: Provides context sensitive help on the current function.

2.8 Customizing TRIM

TRIM provides the functionality to modify the way information is displayed in many of the different screens. Some of these are covered in the next few points.

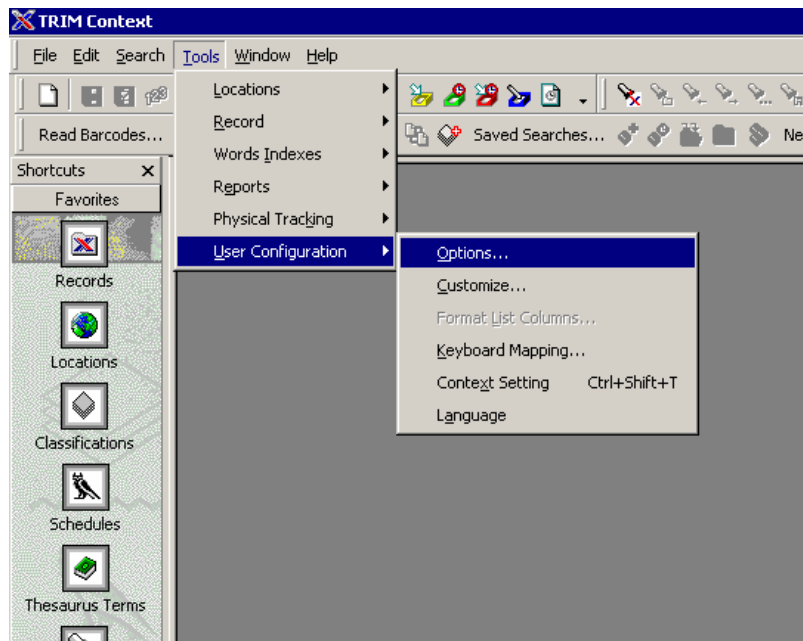
2.9 User Configuration

You should make the following configuration changes to reflect some standard settings that have been set.

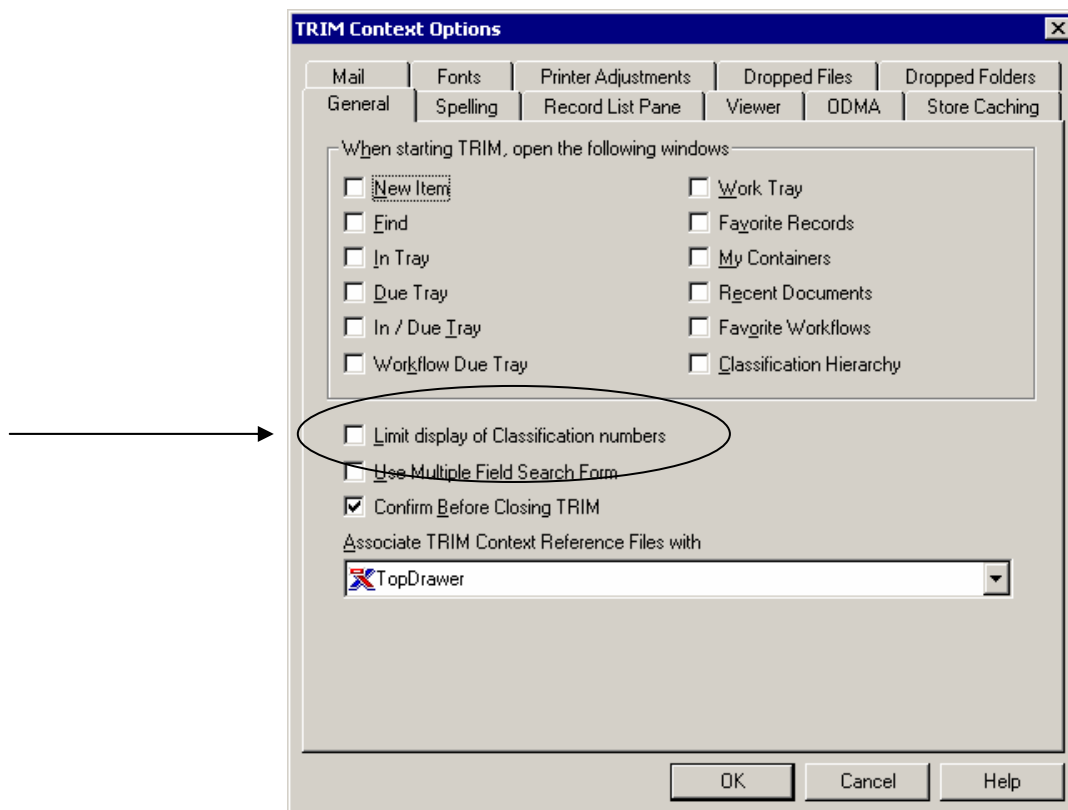
User Configuration Options{ XE "TRIM:User Configuration Options" }

The following changes should be made to the User Configuration Options.

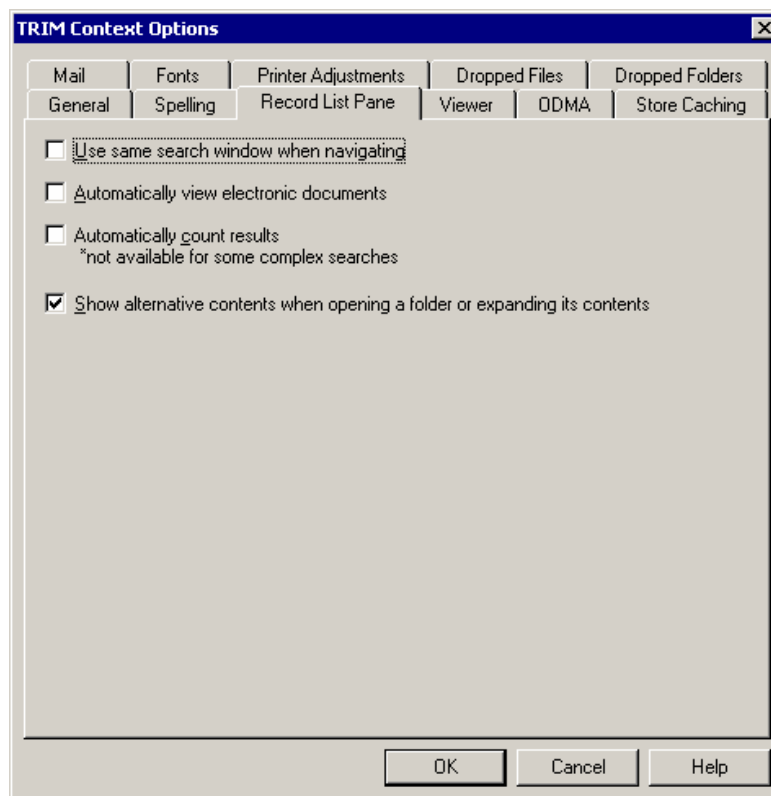
- A. Select **Tools|User Configuration> Options** from the Menu.



- B. Uncheck **Limit Display of Classification Numbers** on the General Tab.

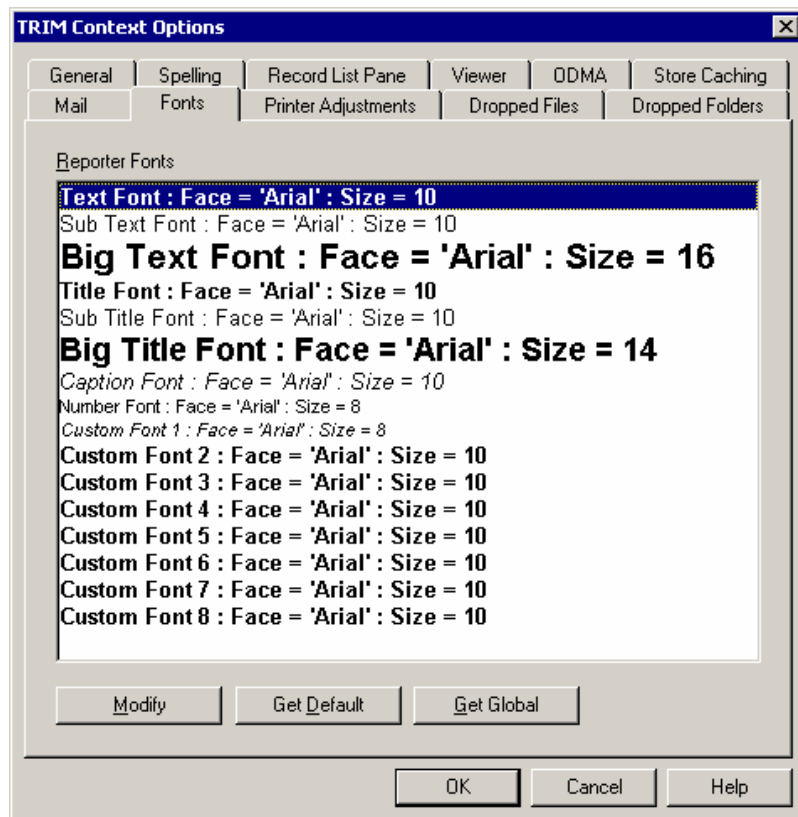


- C. Click the **Record List Pane** Tab and ensure the '**Show alternative contents when opening a folder or expanding its contents**' is checked.

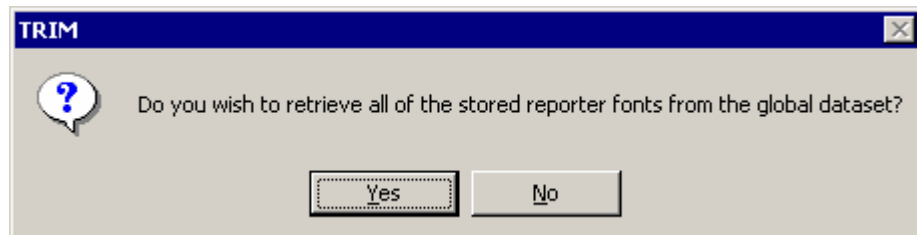


- D. Click the **Fonts Tab** and click **Get Global**.





E. You will see the following dialogue box:



F. Click **Yes** to retrieve the reporter fonts.



G. Click **OK** to close the above dialogue box and return to the Fonts Tab

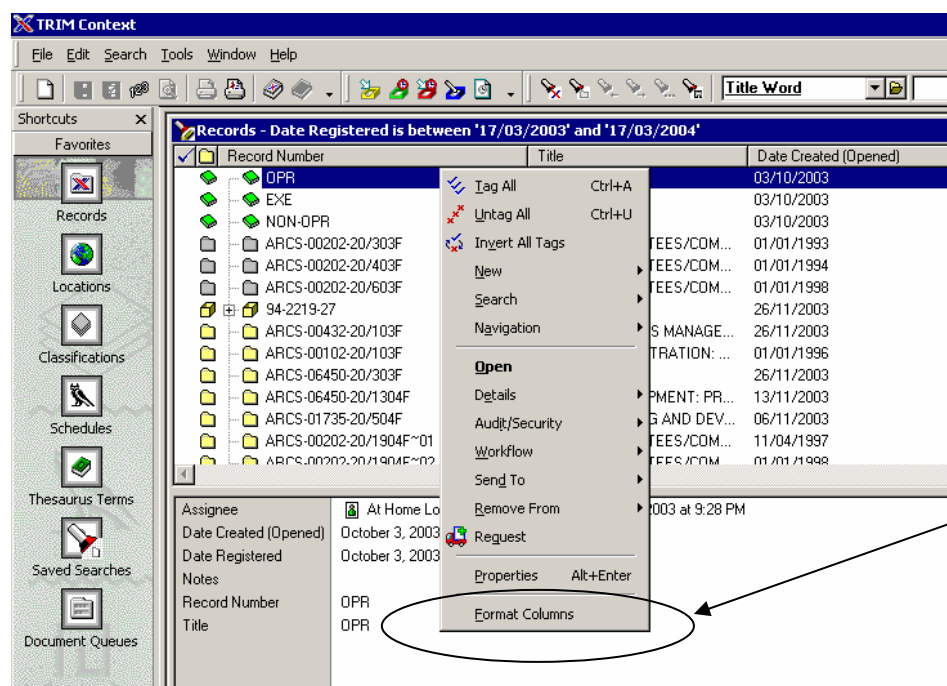
H. Click **OK** to confirm and close out of the User Configuration Options.

2.10 List Pane{ XE "TRIM:List Pane" }

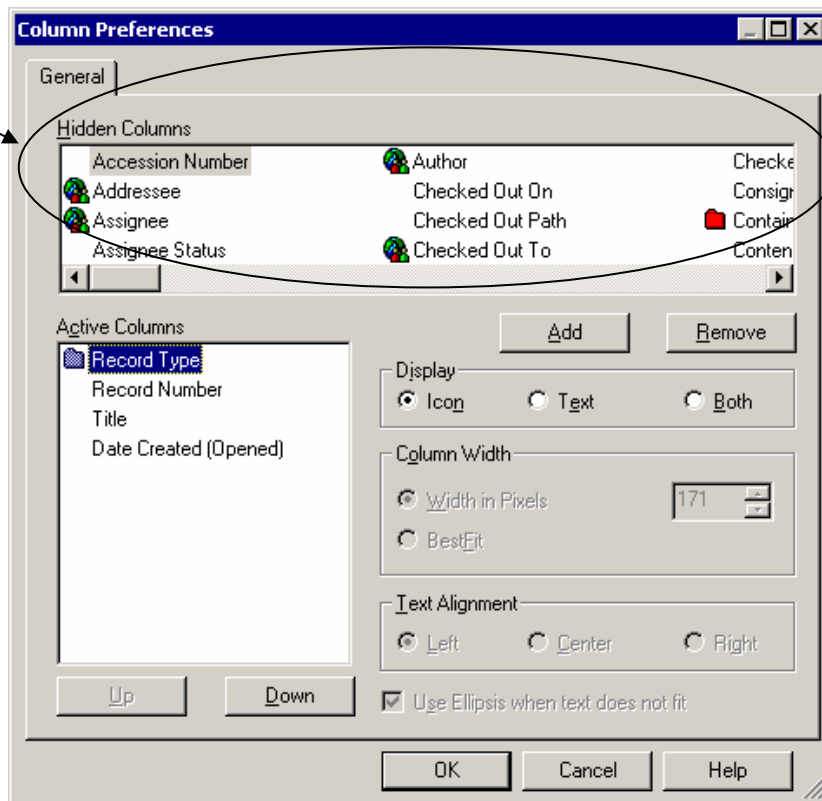
As discussed in the Introduction to this manual, the List Pane displays entries that are relevant to the Dialogue box that has been opened. The information in the List Pane has been divided into Columns. TRIM Context allows you to change the way information is displayed in this screen so that you can customize what you see in this window.

2.10.1 Modifying the Information Displayed{ XE "TRIM:Modifying the Information Displayed" }

If you wish to change the arrangement of the Columns displayed, place your mouse in the List Pane window, right click and select Format Columns.



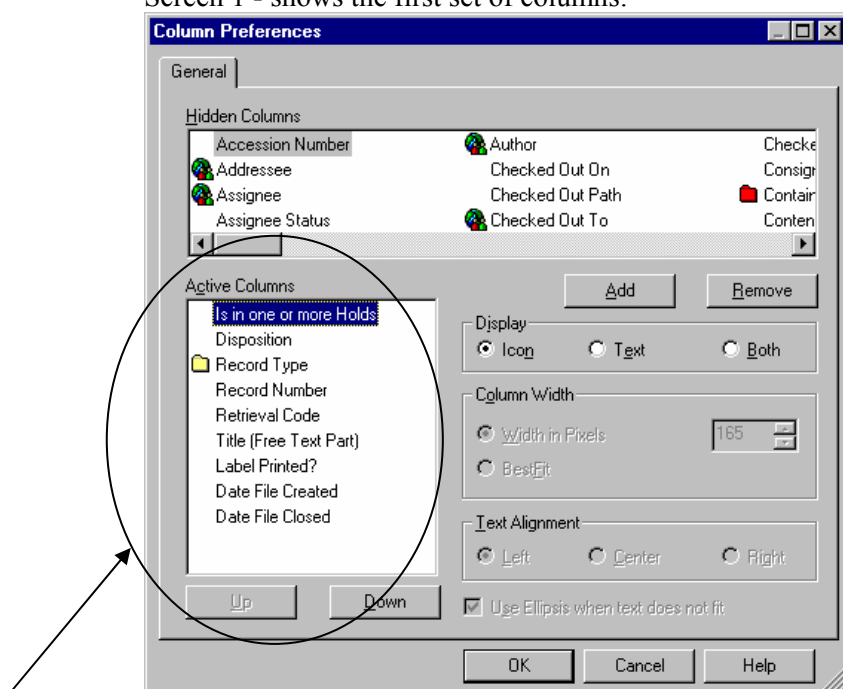
The following dialogue box will appear:



Hidden Columns:	Lists all information that may be displayed within the List Pane. Each dialogue will have different columns that may be displayed. Use the scroll bar to see all available columns.
Active Columns:	This area displays all the Columns that are currently being displayed in the List Pane in the order they will appear.
Adding an Item:	Select the required item in the Hidden Columns list and click Add. Use the Up and Down buttons to change the Display order.
Removing an Item:	Select the required item in the Active Column list and click Remove.

Select **Tools|User Configuration> Format List Columns** to set the recommended List Pane View for Information Workers. The following screenprint shows the Active Columns selected in the Column Preferences Dialogue Box.

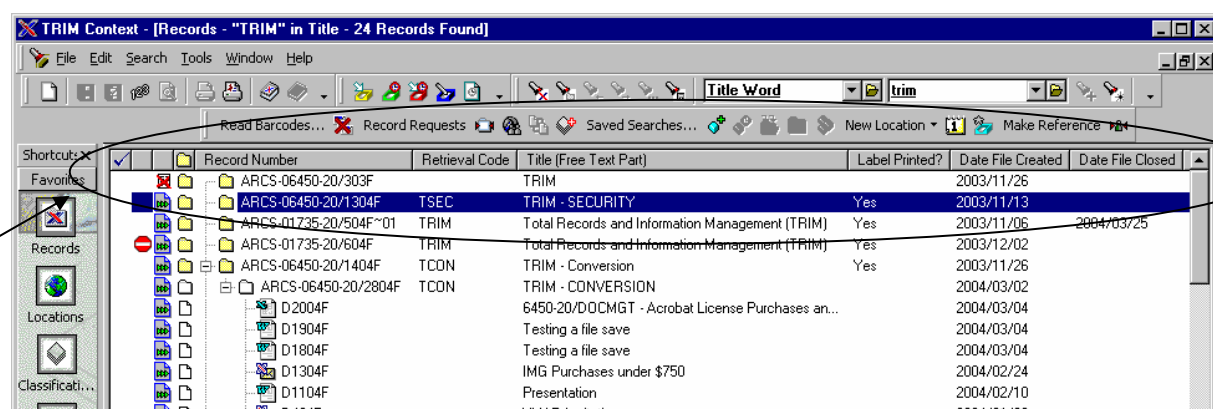
Screen 1 - shows the first set of columns:



The attributes of these columns should be as follows:

Active Column	Display	Column Width
Is in one or more Holds	Icon Only	BestFit
Disposition	Icon Only	BestFit
Record Type	Icon Only	BestFit
Record Number	Set to Both (Text and Icon)	BestFit
Retrieval Code	Text	BestFit
Title [Free Text Part]	Text	BestFit
Label Printed?	Text	BestFit
Date File Created	Text	BestFit
Date File Closed	Text	BestFit

The following screenprint shows the end result:



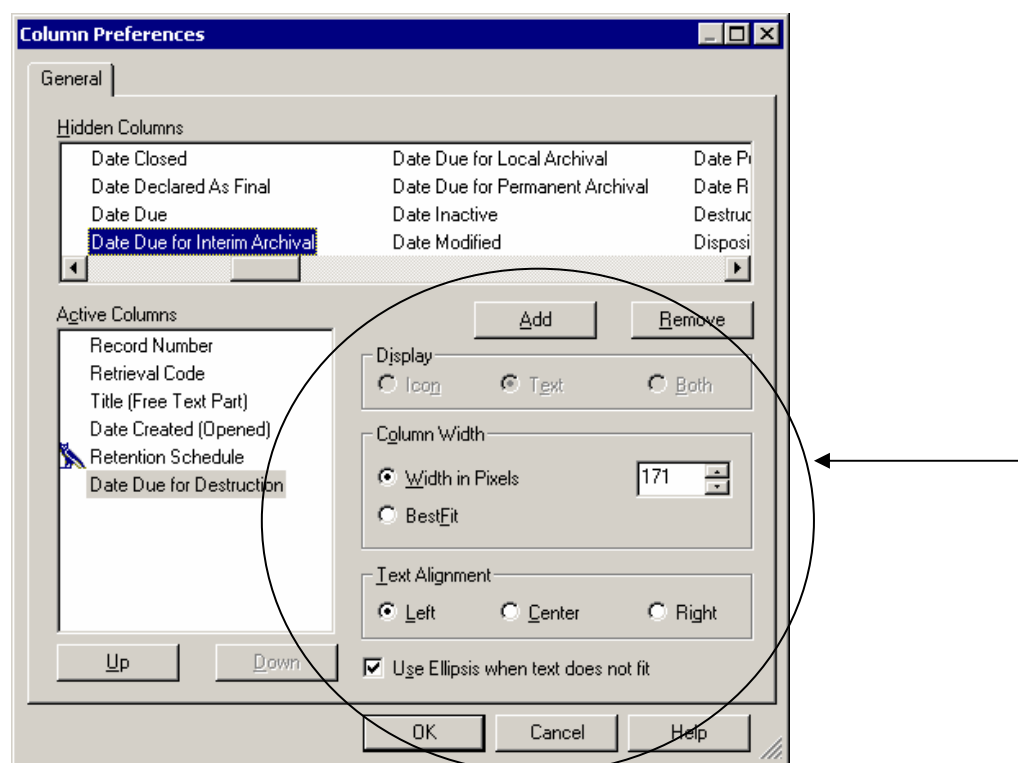
2.10.2 Modifying the Format of the display{ XE "TRIM:Modifying the Format of the display" }:

This area will also allow you to change the format of the display for each of the Active items. The format change is applied only to the currently selected item in the Active Columns List.

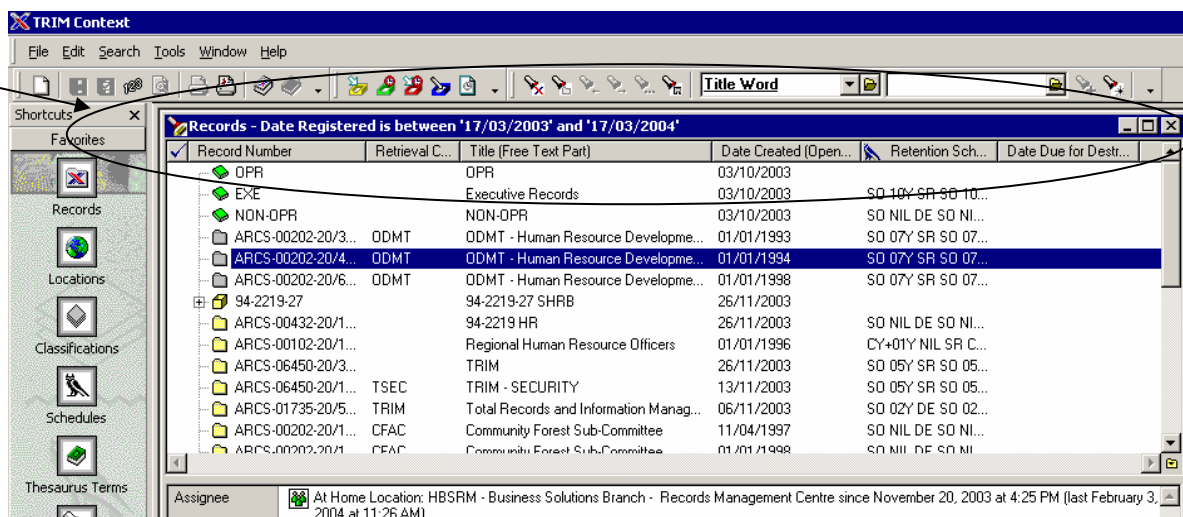
Display:	The Display area gives you the choice of displaying the icon, text or both. If this option is grayed out, then the item does not have an icon to be displayed.

Column Width:	The Column width allows you to manually set the size of the column in pixels or you may select the best-fit option. Although this option is available, it is far easier to modify the size of the columns with the mouse.
Text Alignment:	The Text Alignment determines the position of the text within the column. You can select from Left, Center or Right.
Use Ellipsis:	The “use Ellipsis” when text will not fit, will place three ellipsis (...) after the text to indicate that the text cannot be fully displayed within the column size.

The following screenshot shows the new column headings that will be added:



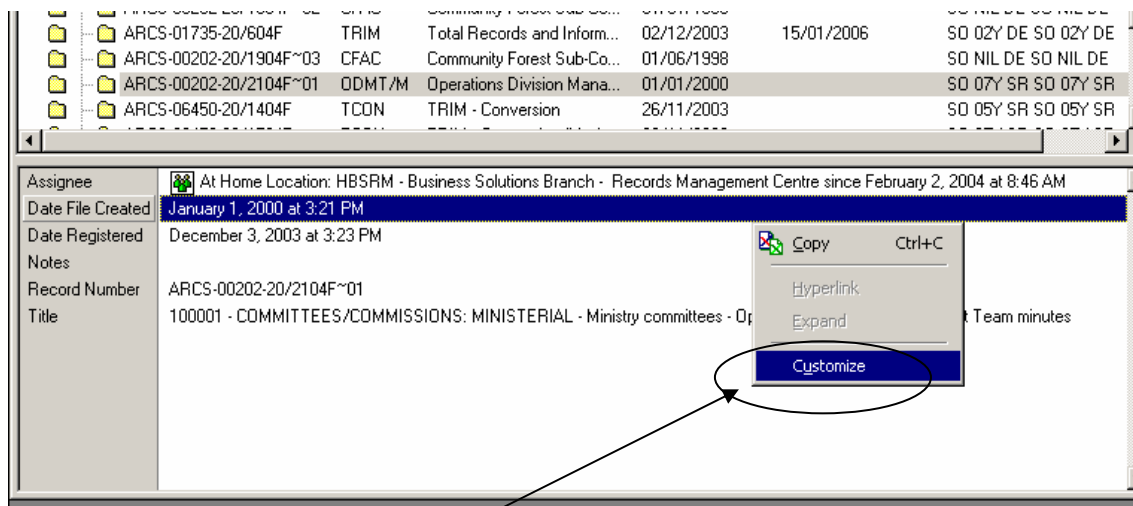
The following screenshot shows the end result with the formatted columns:



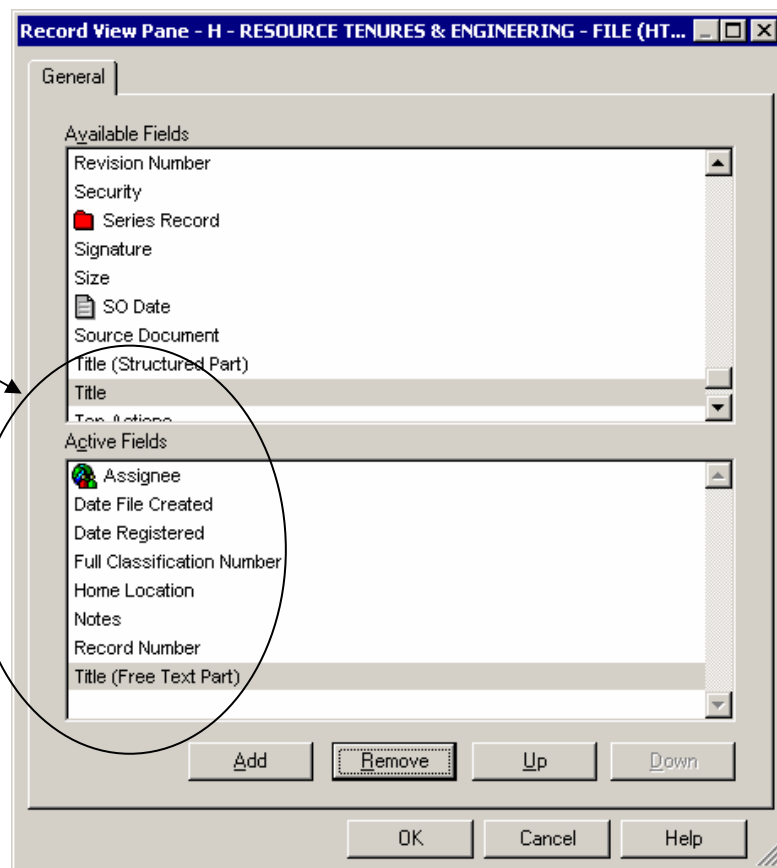
2.11 The View Pane

2.11.1 Customizing the View Pane{ XE "TRIM:Customizing the View Pane" }

You can use a Short Cut Menu to change the View Pane options. For example, once you have searched for a record, place your mouse in the Record View pane, right click and select Customize.

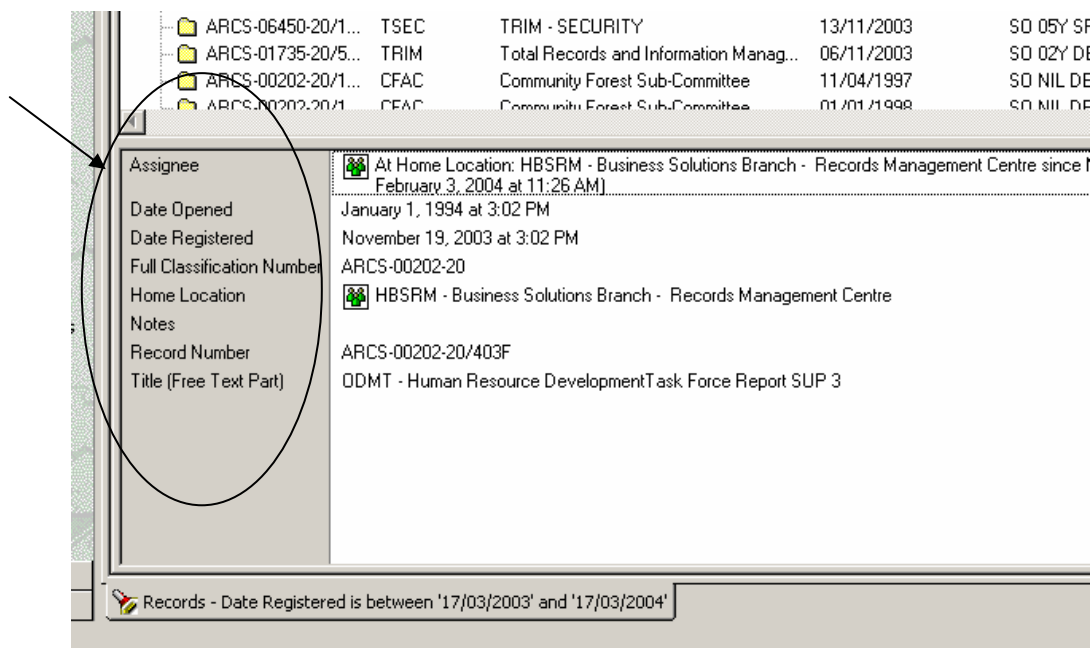


The View Pane Options window will appear:



Select one of the options from the Available Fields and either double-click or click **Add** to move the field into the Active List. The Up and Down buttons will change the order in which the field is displayed in the Active Fields List. To remove an unwanted field from the Active List, double-click on that field or highlight it and click **Remove**.

The following screenprint shows the changes to the View Pane window:

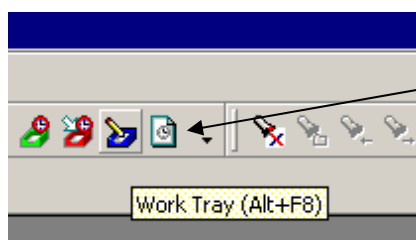


Note: In TRIM you must customize the view pane for each different Record Type, e.g. Box, File, Document. The above screenprints are for displaying the List and View pane for a File Supplement Record Type. As you become comfortable using TRIM, you may customize the List and View pane fields to your personal preferences. The List and View pane customizations are specific to your ID and the PC you make the changes on.

2.12 Records Work Tray{ XE "TRIM Trays:Records Work Tray" }

The Work Tray displays the 'Work Tray' of the logged in user. The Work Tray provides a convenient place to hold Records that are frequently accessed by a user.

Selecting the Work Tray will display the Records Work Tray window containing the Records you have placed in your Work Tray. You can access this tray on the toolbar.



2.13 Adding Records to the Work Tray{ XE "TRIM Trays:Adding Records to the Work Tray" }

To add records to your Work Tray you can perform a 'Search, Tag and Do' function.

- A. Search for the records that you frequently use.

- B. Press **[Ctrl] [A]** to tag all records.
- C. Press **[F3]** or, right-click and choose **Send To>Add To Records Work Tray** from the short-cut menu.

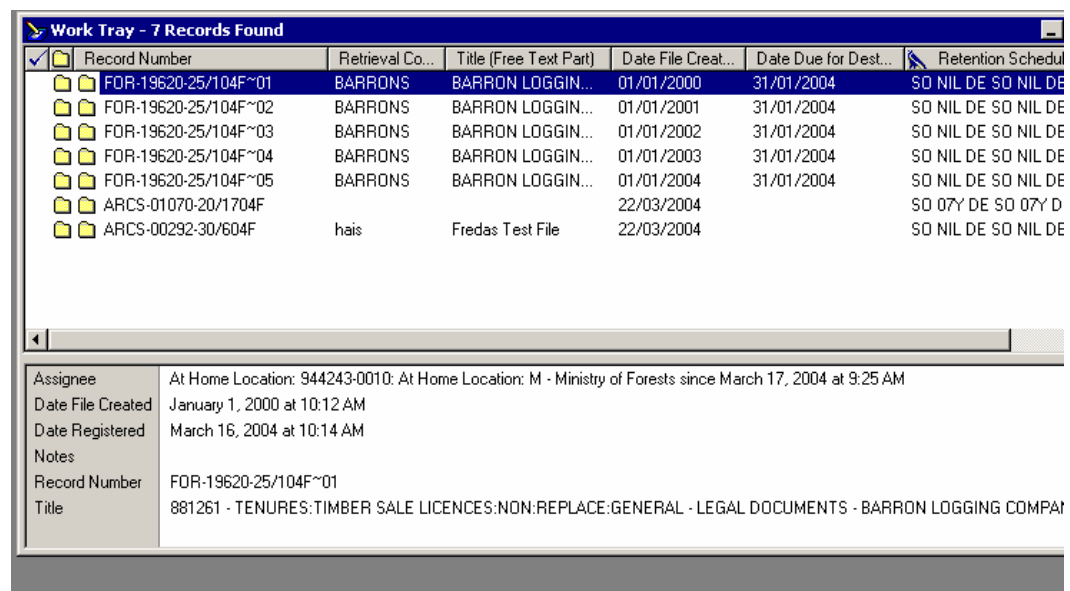


- D. Click *OK* to confirm.

2.14 Accessing Records in the Work Tray{ XE "TRIM Trays:Adding Records to the Work Tray" }

To use the records in the Work Tray,

- A. Click the Work Tray icon on the toolbar
- B. The records will be displayed on the screen in a search results window.



2.15 Questions

Here are a few questions to test yourself on what you have learned in this chapter. Circle the letter next to the correct answer(s) where the question is a multiple choice:

1. TRIM Context™ is:
 - a. Strictly a document management program.
 - b. A new weight-loss program.
 - c. A word-processing program.
 - d. A fully integrated Electronic Document and Records Management Solution program.
2. Only the System Administrator can customize TRIM desktop settings:
 - a. True.
 - b. False
3. Columns cannot be sorted in the List Pane window:
 - a. True.
 - b. False.
4. A shortcut menu can be used to change the View Pane options:
 - a. True.
 - b. False.
5. What is the difference between a Drop-down List and a KwikSelect list?

6. Explain the steps to customize the View Pane window:

7. The Drop-down list in a Dialogue Box displays:
 - a. Up to the last 4 most recent selections.
 - b. Up to the last 15 most recent selections.
 - c. Up to the last 25 most recent selections.
8. The View Pane displays Hidden and Active Columns:
 - a. True
 - b. False

2.16 Summary

In this Chapter you learned:

1. About TRIM Context™.
2. How to launch the program.
3. About the different menu options
4. How to modify the List and View Pane screens.

You should now understand what TRIM Context™ is, how to launch the program and know the different menu features as well as how to modify the display of information.

3. Records{ XE "Records" }

Many types of records can be created, modified and searched for in TRIM Context™. This handout deals with physical records only. You will learn about managing electronic records in another phase of this training.

3.1 Objectives

In this Chapter you will learn:

1. How to perform Title Word and Retrieval Code searches.
2. How to create file and supplement records.
3. How to relate records.

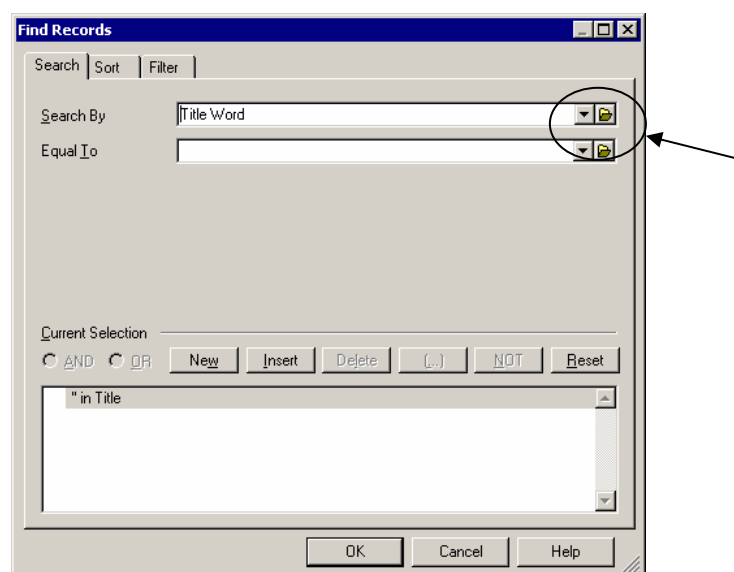
Following completion of this chapter, you will know how to search for records, how to create different types of records and how to relate records. You will also be able to test your knowledge of this topic by answering the questions at the end of this chapter.

Searching for Records{ XE "Records:Adding Records to the Work Tray" }

Before learning how to create and modify a record the following information will first teach you how to search for a record in the TRIM repository.

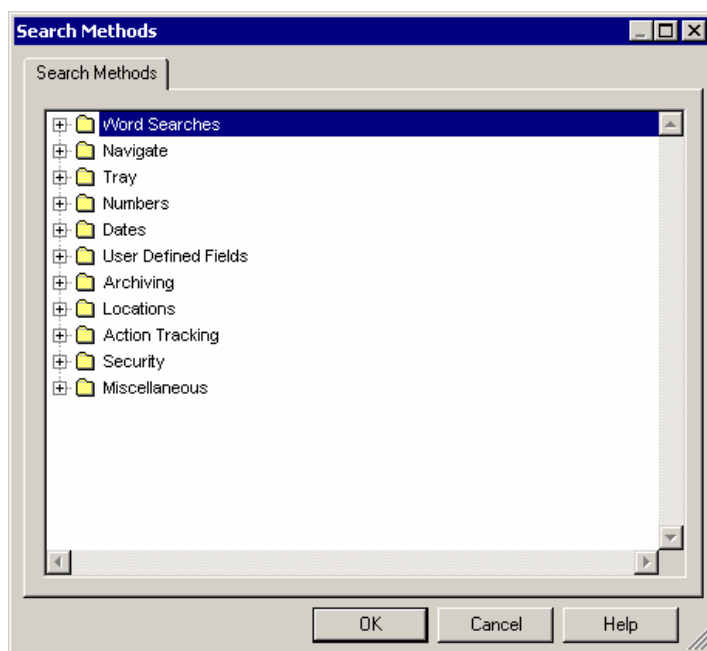
TRIM has a large number of fields to select from when searching. You can select the Search Method via the KwikSelect or the Drop-down Lists. The 'Search By' area is where you select the Search Method; that is, the TRIM field that you wish to search across. Once you have selected the Search Method, TRIM will display the appropriate search value options where you enter the corresponding criteria that the search must meet.

Note: Searching on Title Word does not search for Retrieval Code (Tertiary level). The Retrieval code can be searched separately as a User-Defined field.



KwikSelect:

The KwikSelect  next to the **Search By** field will open the Search Methods Dialogue Box. This box reveals all of TRIM's Search Methods divided into logical categories. To access a category click the plus sign to view the list of search methods for that category.

**DropDown List:**

The Drop-down List next to the **Search By** will display the most recently used Search Methods up to the last 25. This list will be empty until the first search is performed.

Entering Search Values{ XE "Records:Entering Search Values" }

Depending on the Search Method selected, TRIM will change the name of the fields to those that you can enter in your search value. These are logically named and most fields will offer a KwikSelect and/or Drop-down list to help you select a search value. These values will vary depending on the type of search method selected. For example, if you choose **Date Registered**, the search criteria field will require a date to be entered as a valid value.

***Note:** Search values can be entered in lowercase or uppercase and TRIM will find all cases. It is not case-sensitive. To do a partial name search you must include the *at the end of the criteria otherwise TRIM looks for an exact match of the search criteria entered.*

Try the following exercise to perform a Title Word search.

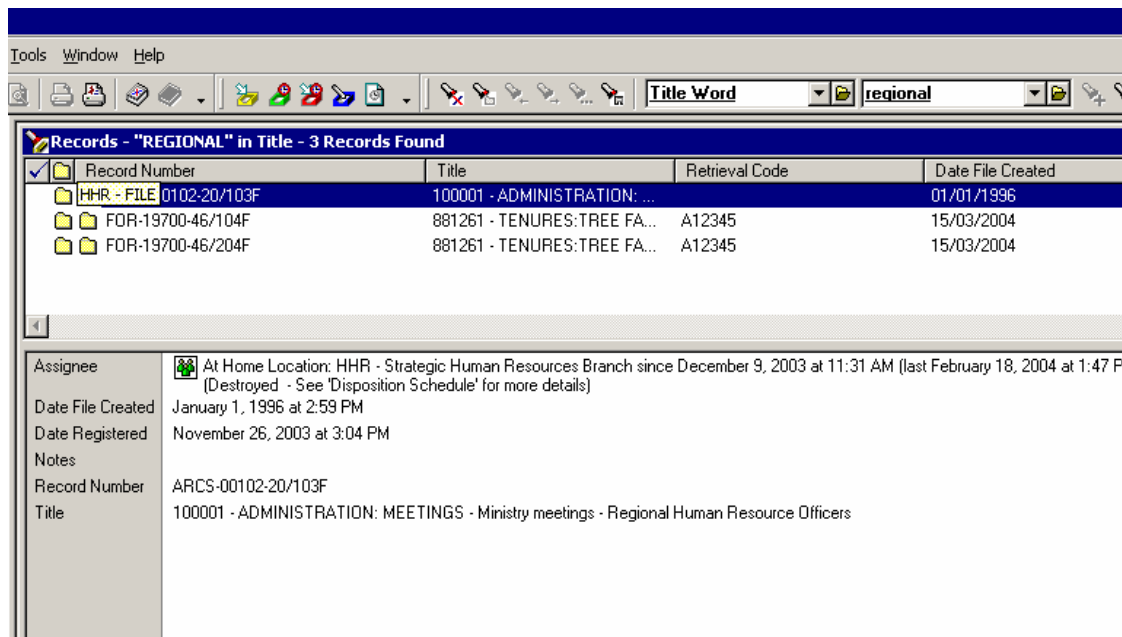
Exercise 1**Performing a Title Word Search**

This exercise will demonstrate how to perform a **Title Word Search** from Context. You should be at the main Context screen.

1. Click the  Find Records button on the toolbar.
2. Choose **Title Word** as the **Search By** method in the Search Tab screen.

3. Type the word: **regional** in the **Equal To** field and click *OK* to begin the search.
4. The search results should return all records containing the word **regional** in the title.
5. If more than one record is listed, double-click any one of the records to view the details.
- B. Click the **Cancel** button to close the record and return to the search results screen.

The following screenprint shows the results of the above search:



Placing the cursor over the first folder icon to the left of the first record in the list briefly shows the Record Type as displayed above in the screenprint (HHR - File).

One of the Search Methods that TRIM permits is a User Defined Field Search. This means that the Ministry of Forests can create User Defined Fields to assist in the search for records that have information unique to the Ministry. One of those fields is the Retrieval Code which is used frequently in searching for records. The next exercise will provide you with the instructions to perform a Retrieval Code Search.

Exercise 2

Performing a Retrieval Code Search

Complete the exercise below to search for a file using the **User Defined Field** search method for **Retrieval Code**.

1. You should be at the main Context screen.
2. Click the  Find Records button on the toolbar.
3. Click the KwikSelect  button to open the Search Methods Dialogue Box.
4. Click on the + sign to expand the **User Defined Fields** category.
5. Choose **Retrieval Code**
6. Search for a file that contains the Retrieval Code **CFAC**.

You will be taught more about the Search Methods in TRIM later in the course. Now that you have learned how to search for a record using the Title Word Search and User Defined Field methods, you need to know how to create a record.

Record Numbering{ XE "Records:Record Numbering" }

The Government of British Columbia ARCS/ORCS classification system has been incorporated into the record numbering system in TRIM.

For example: - **FOR-10490-20/204F**

Record No.:	FOR	10490	-20 /	2	04	F
Definition:	ORCS Schedule	Primary	Secondary	Unique Identifier	Year	Dataset ID

4. Record Requests{ XE "Record Requests" }

TRIM Context provides the capability to request records either as a one-time request or on a recurring basis as well as manage record requests. The Manage Requests privilege is required to remove a Request that is for someone else and would be performed by someone such as an Information Worker, Information Manager or Administrator. An End User can only remove his/her own requests.

***Note:** Request for transfer of legal custody is considered a record request for permanent transfer. Litigation requests would fall under Record Maintenance as a temporary charge-out.*

4.1 Objectives

In this Chapter you will learn how to:

1. Request a file folder.
2. Process a request for a file folder by another person (location).
3. Search for records due back.
4. Remove a request.

Following completion of this chapter you will understand how record requests work in TRIM Context.

4.2 How Do I Submit Record Requests{ XE "Record Requests:Submit Record Requests" }?

To request a file in TRIM is a very simple process. Again, the 'Search, Tag and Do' principle applies. Basically, it is a matter of searching for the file(s), tagging, and requesting. For example:

- A. Search for the file(s) you wish to request.
- B. Right-click on the file and choose **Request** from the short-cut menu. If requesting more than one file, then tag the files.



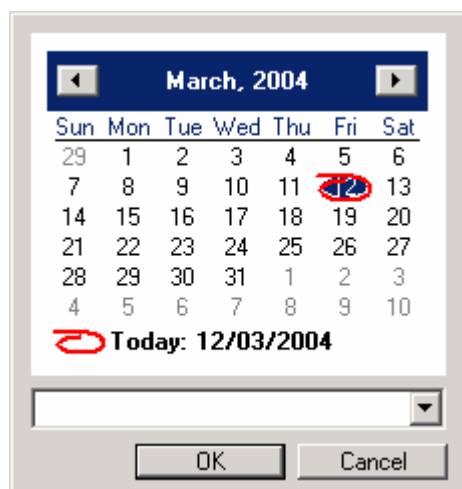
- C. You will only see this Dialogue Box if you have tagged more than one record. Click **OK** to confirm you wish to request all tagged records.

The following dialogue box will appear:



Note: The **Requested By** field defaults to the login user id.

- D. Select the **Date Needed** by clicking the Calendar  button. This field defaults to the current date.



- E. Locate the correct month by clicking the  to scroll beyond the current month and choose the date. The time also can be typed in manually by highlighting the

existing time and entering the desired time in the following format: **8:00 AM**. The hours, minutes and seconds are separated by a colon.

If this is a recurring request, TRIM provides the option of establishing daily, weekly, monthly and yearly recurrences as well as specifying an end time. This would be done by checking the **Recurring Resubmit** checkbox if you would be requesting this file on a regular basis. If you check this box, you will be prompted to enter the frequency of the request and a date when the request will end (if applicable).

F. Click *OK* to submit the request.

You can now search for the record you just requested either by **Record Request By Location** (from the Locations Search Method) or by **Date Requested** (from the Dates Search Method).

The following screenprint shows the search result of Record Requests **By Location, Freda Wilson**.

Record Number	Retriev...	Title (Free Text Part)	Date File Creat...	Date Due for C...
FOR-15700-20/2004F	CUMML...	CUMMINGS, ANN	21/08/1967	

Assignee	At Home Location: 944243-0012; At Home Location: M - Ministry of Forests since March 19, 2004 at 3:10 PM
Date File Created	August 21, 1967 at 11:00 AM
Date Registered	March 17, 2004 at 11:08 AM
Record Class	Corporate
Record Number	FOR-15700-20/2004F

Complete the following two exercises to submit a record request.

Exercises - Record Requests{ XE "Exercises:Submit Record Requests" }

Exercise 1

Submitting a Record Request

This exercise will demonstrate how to submit a Record Request in TRIM.

1. You should be at the main Context screen.
2. Search for one of the file folder records that you created today.
3. Highlight the file in the search results window.
4. Right-click and choose **Request**.
5. Change the **Date Needed** to some future date.
6. Click *OK* to submit the request.

Exercise 2

Submitting a Record Request

Complete the following exercise to submit a record request based on the steps you have just learned.

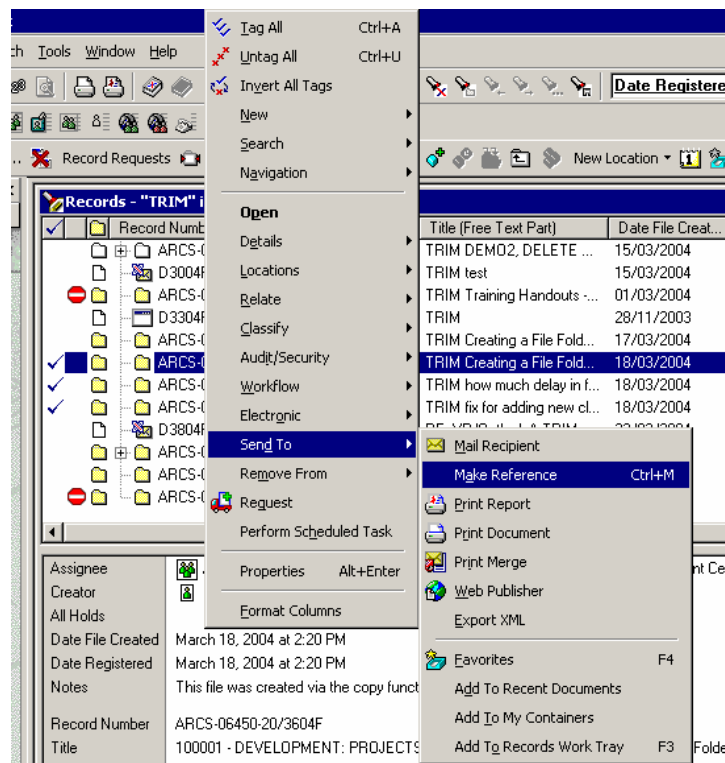
1. You should be at the main Context screen.
2. Search for another record that you created today.
3. Submit a request for this record for May 21, 2004.

4.3 Making a TRIM Reference{ XE "Record Maintenance:Making a TRIM Reference" }

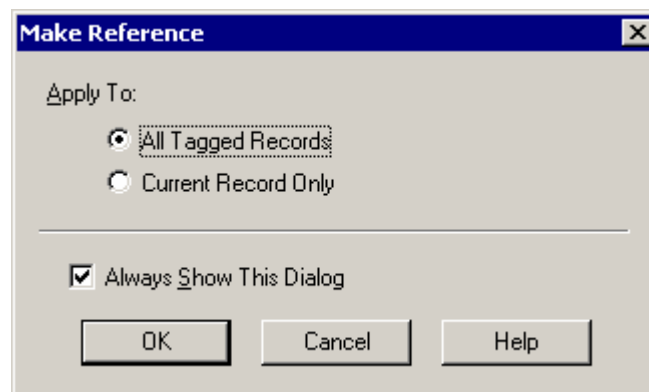
A TRIM Reference is merely a pointer or shortcut to a record or group of records registered in TRIM Context, much like a link to a website. The TRIM reference object can be embedded in other applications such as e-mail.

To make a TRIM Reference follow these steps:

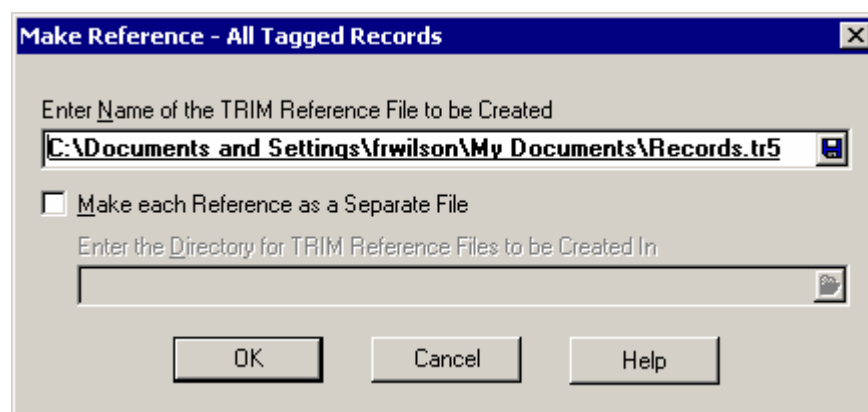
- A. Press [CTRL][M] on the keyboard or, right-click and choose **Send to>Make Reference**.



You will see the following dialogue box appear:

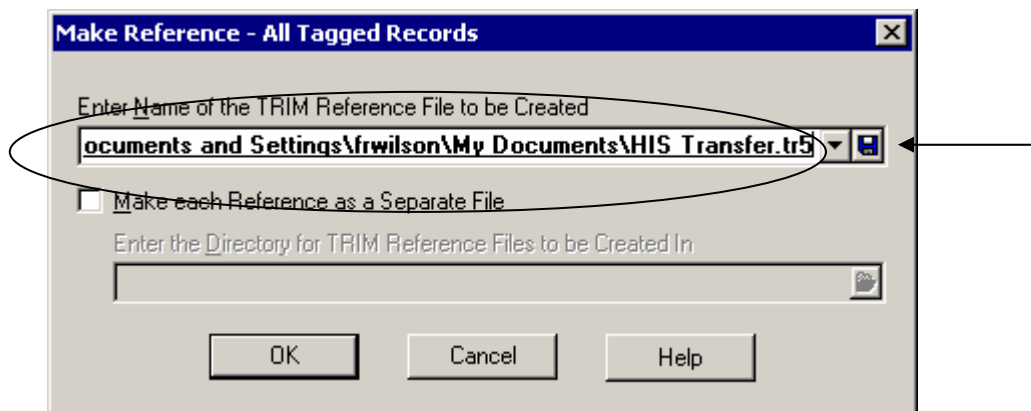


B. Click *OK* to confirm all tagged records on the Make Reference Dialogue Box:

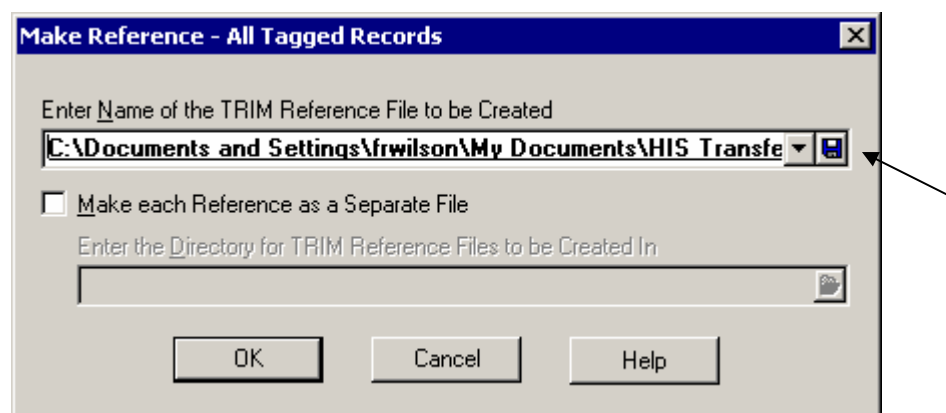


You can choose to make each reference a separate file or accept the default of one reference for all the files. TRIM automatically will name the file **Records.tr5** as the name of the TRIM Reference file.

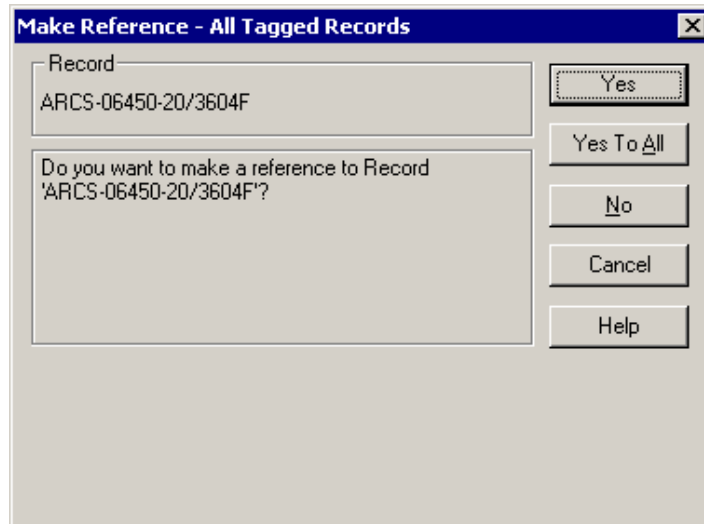
- C. To change the filename, highlight the name **Records** in the filename **Records.tr5** and enter a new filename, for example **HIS Transfer**. TRIM will save the new file **HIS Transfer.tr5** to the directory listed in the text box.
- D. In the example below, the new file **HIS Transfer.tr5** is being saved to my default documents directory.



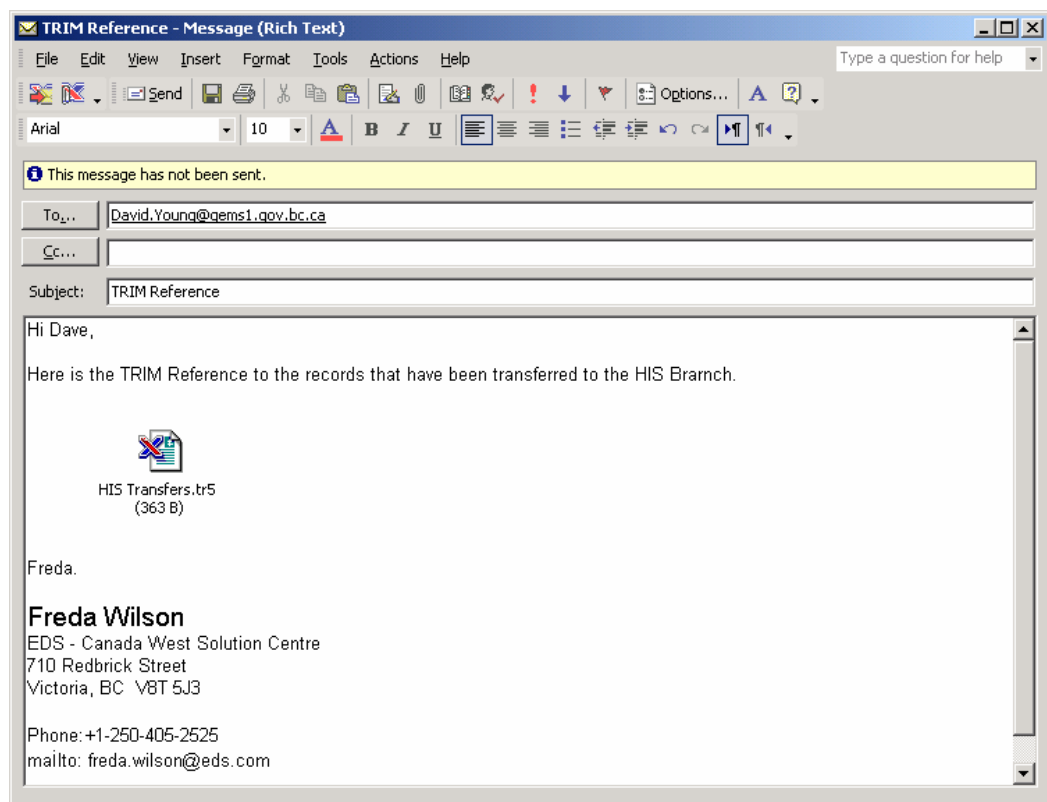
You can change this directory by clicking on the disk icon and browsing to the drive and directory where you want the file to be saved.



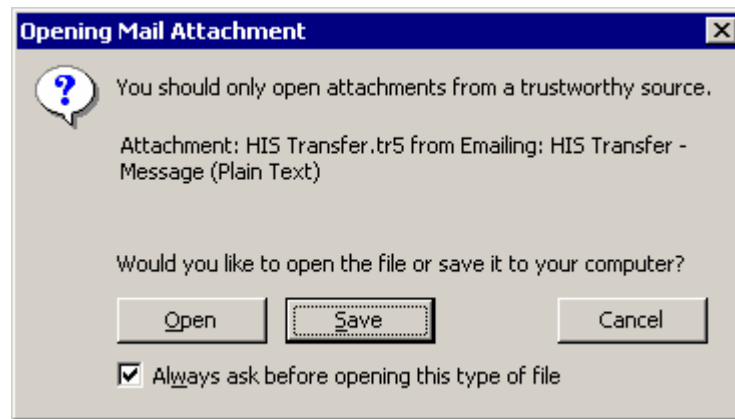
- E. Click *OK* to confirm the reference.



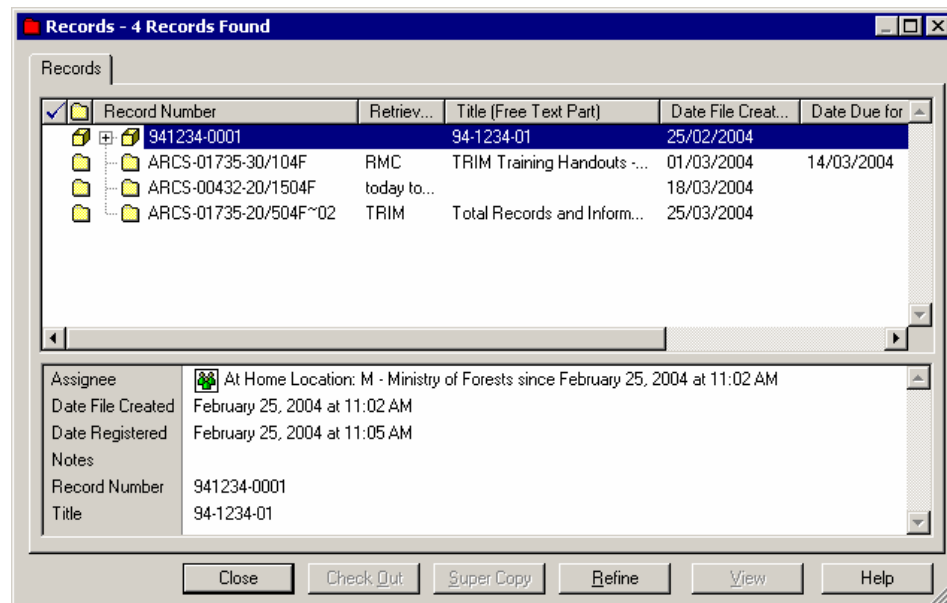
- F. Click **Yes to All** to make a reference to all tagged records.
- G. You can now send the TRIM Reference file to the appropriate person via e-mail. The recipient must be an existing TRIM user. See the example below:



- H. Double-click on the TRIM Reference in the e-mail. You may see the following dialogue box:



- I. You can choose to open the reference or save it to disk and open from there. Either way, when you click on the file you will see the following search results screen:

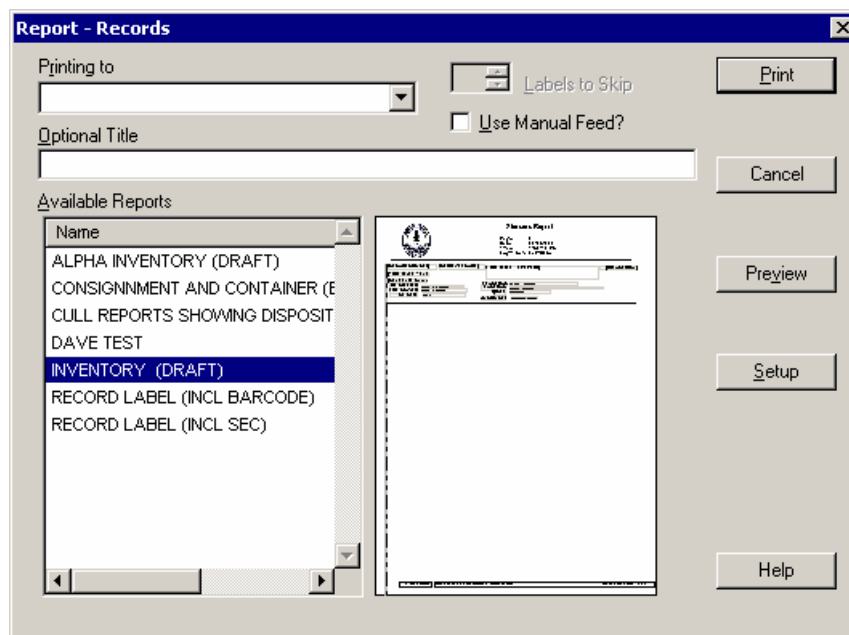


- J. You can now view the files from this screen.
 K. Click **Close** to close this window.

You also may wish to send this list to an Inventory Report and print out the list by returning to the Search Results Screen for the records to be transferred.

Record Number	Retrieval Co...	Title (Free Text Part)	Date File Creat...	Date Due for Dest...	Retention Schedule
FOR-19620-25/104F~...	BARRONS	BARRON LOGGIN...	01/01/2000	31/01/2004	SO NIL DE SO NIL DE
FOR-19620-25/104F~...	BARRONS	BARRON LOGGIN...	01/01/2001	31/01/2004	SO NIL DE SO NIL DE
FOR-19620-25/104F~...	BARRONS	BARRON LOGGIN...	01/01/2002	31/01/2004	SO NIL DE SO NIL DE
FOR-19620-25/104F~...	BARRONS	BARRON LOGGIN...	01/01/2003	31/01/2004	SO NIL DE SO NIL DE
FOR-19620-25/104F~...	BARRONS	BARRON LOGGIN...	01/01/2004	31/01/2004	SO NIL DE SO NIL DE

- A. Make sure the records are tagged.
- B. Click the **Print Report**  button on the toolbar, or right-click in the search results screen and choose **Send to>Print Report**
- C. Choose the **Inventory (DRAFT) Report**
- D. Click **Preview** to view the report prior to printing.



- E. Click **Print** to send the report to your printer.

4.4 Adding Records to the Work Tray{ XE "Disposition Management:Adding Records to the Work Tray" }

To add records to your Work Tray you can perform a 'Search, Tag and Do' function.

- A. Search for the records that you frequently use.
- B. Press [Ctrl] [A] to tag all records.
- C. Press [F3] or, right-click and choose **Send To>Add To Records Work Tray** from the short-cut menu.

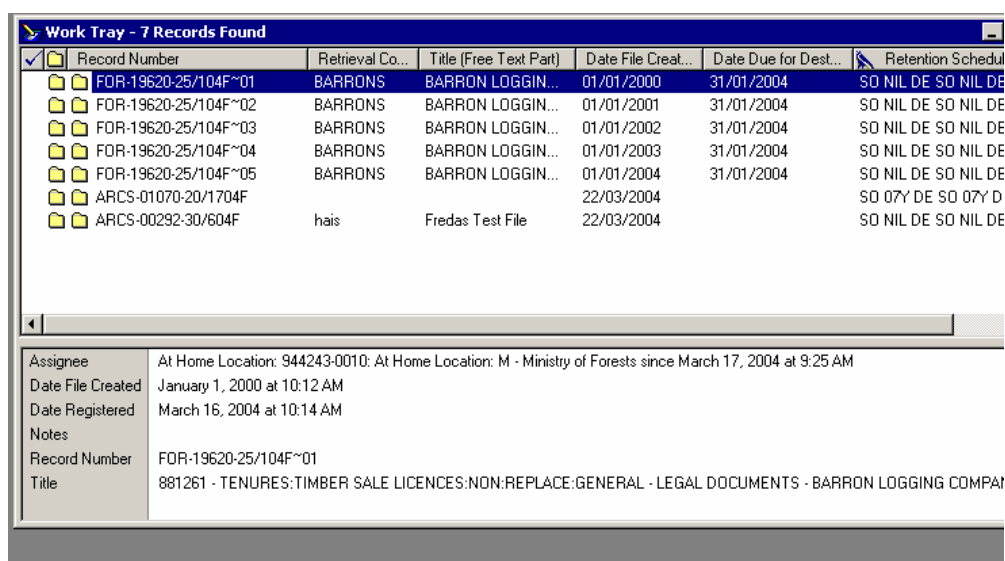


- D. Click *OK* to confirm.

4.5 Accessing Records in the Work Tray{ XE "Disposition Management:Accessing Records in the Work Tray" }

To use the records in the Work Tray,

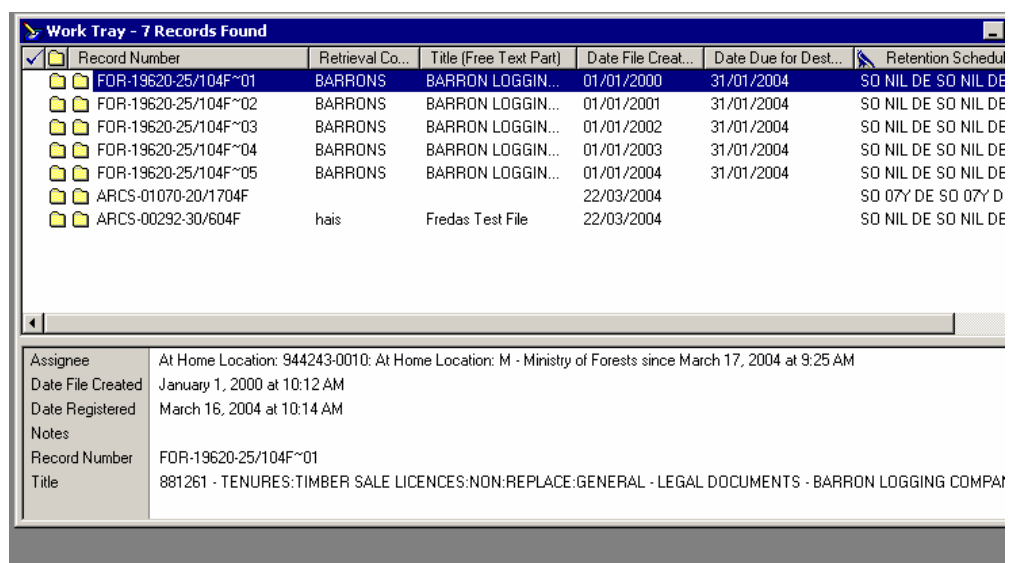
- A. Click the Work Tray icon on the toolbar
- B. The records will be displayed on the screen in a search results window.



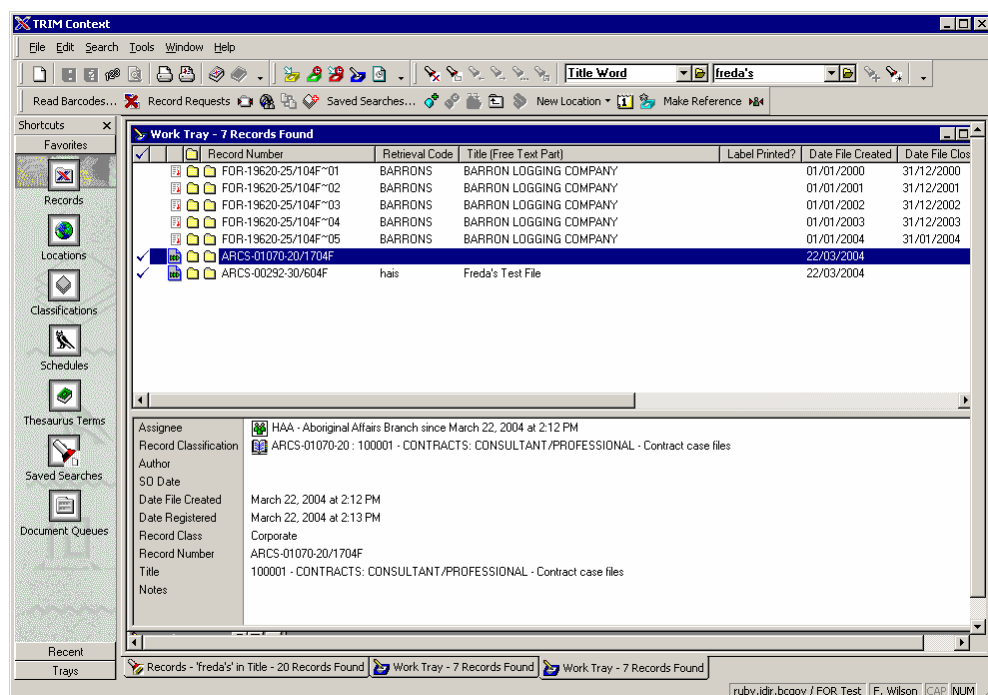
4.6 Removing Records from the Work Tray{ XE "Disposition Management:Removing Records from the Work Tray" }

Once you no longer require records in the Work Tray you can remove them. To do this follow the steps below:

- A. Click the Work Tray button on the TRIM Toolbar, or press [Alt][F8] to open the Work Tray screen. The screenprint below shows 7 records in the Work Tray:



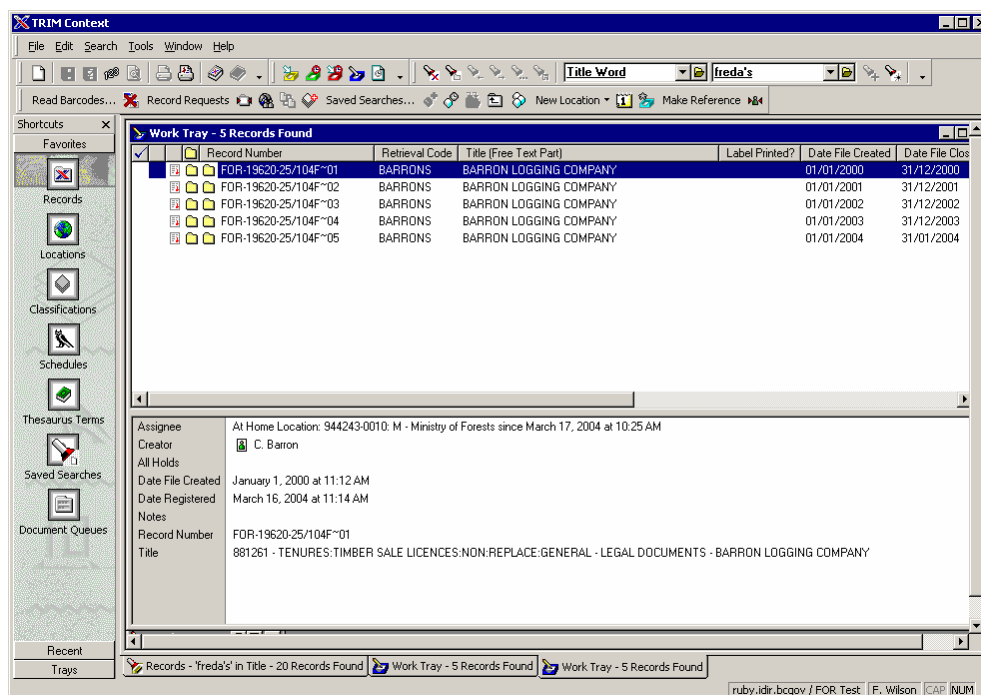
- B. Tag the records you no longer need to keep in the Tray.



- C. Right-click and choose **Remove From>Remove Record from Records Work Tray** from the short-cut menu.



- D. Click *OK* to confirm all tagged records.
- E. The records will be removed and you will be returned to the Work Tray screen.



There are now only 5 out of the 7 records remaining in the Work Tray.

5. Locations{ XE "Locations" }

Locations in TRIM Context are used to maintain the historical integrity of your organization's record holdings. They are used to track certain administrative functions, record Location changes (movements) and record Workflow. A Location in TRIM Context can be a **Person**, **Position**, **Organization** or **Group**. The Ministry of Forests is not using Position at this time.

Normally the TRIM Administrator and Information Manager roles only can create and maintain Locations, however, the permission has been granted to Information Workers to create Internal Person type users. We will only address adding an **Internal Person** type location in this chapter.

5.1 Objectives

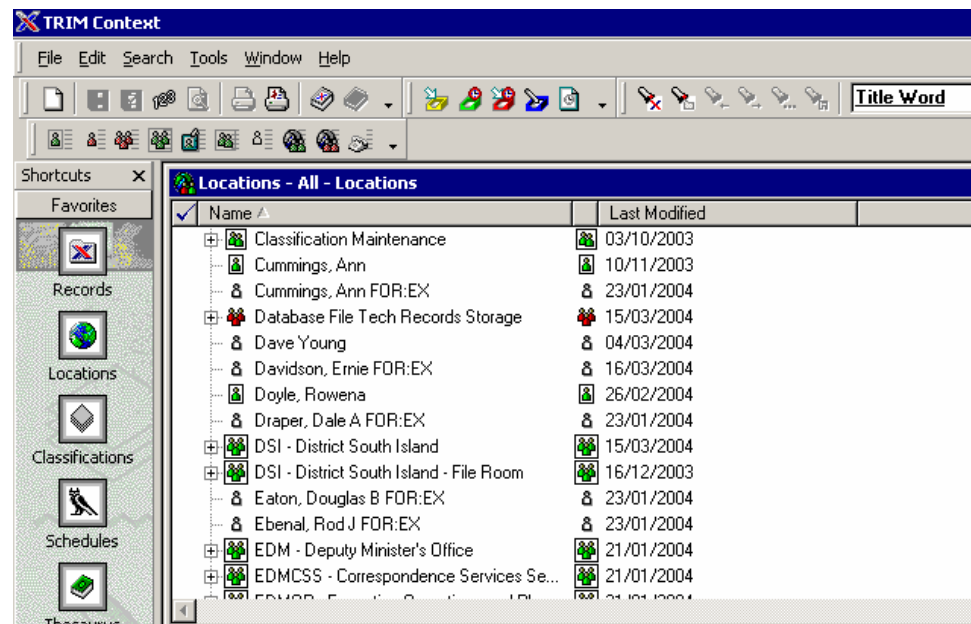
In this chapter you will learn about the following types of locations:

1. Person
2. Organization
3. Group
4. How to create an Internal Person Location.

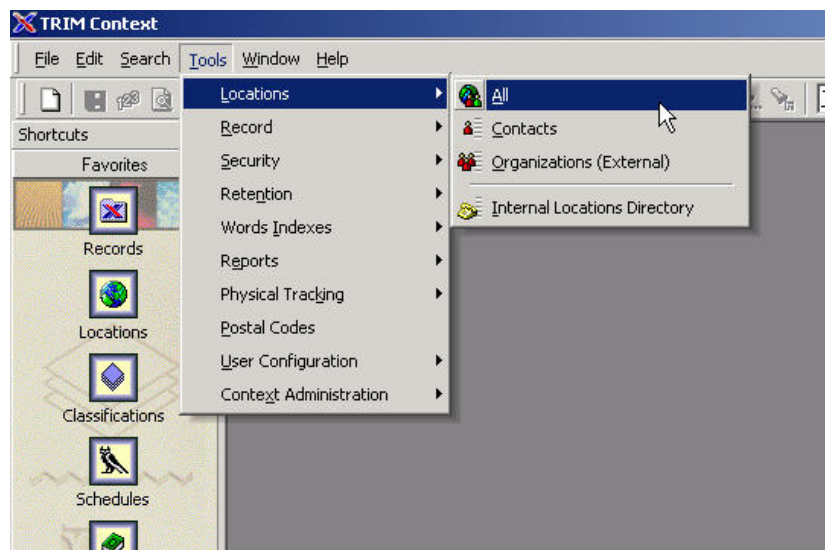
Following completion of this chapter you will have an understanding of TRIM locations and you will be able to create an Internal Person Location in TRIM Context™. You will also be able to test your knowledge of this topic by answering the questions at the end of this chapter.

5.2 Understanding Locations{ XE "Locations:Understanding Locations" }

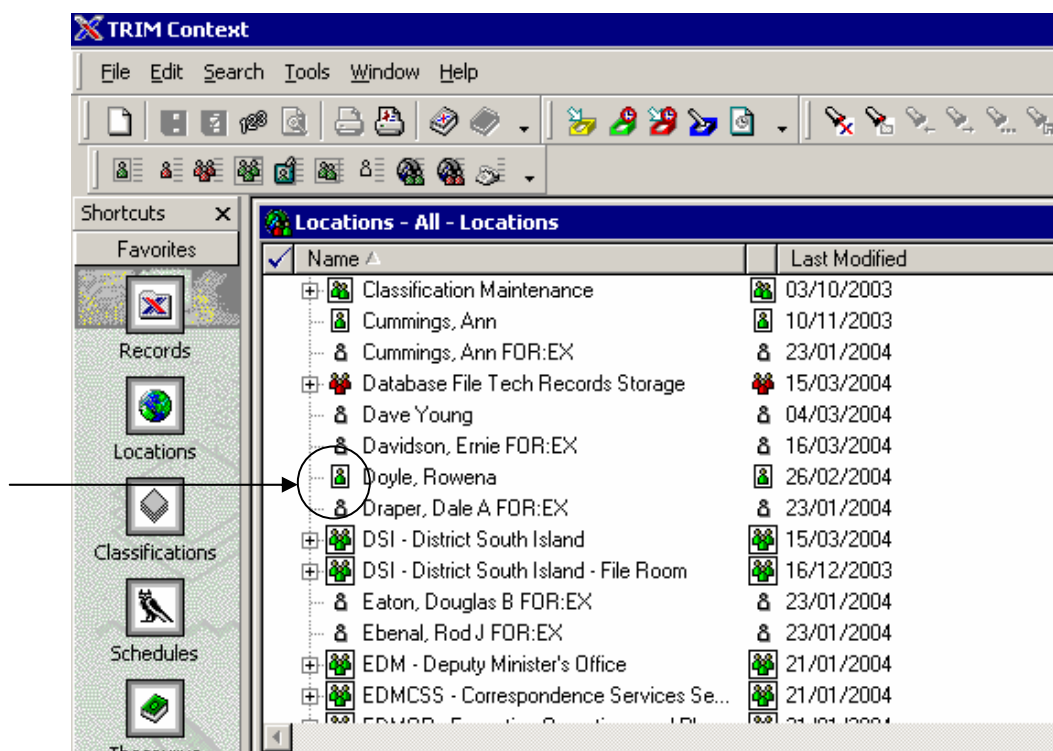
Locations in TRIM Context are used to track certain administrative functions, record Location changes (movements) and record Workflow. TRIM Context arranges all these Locations according to a hierarchy such as Department, Division and then Branch.



This gives you the ability to generate reports based on any layer that exists within your organization. It is standard practice to create a hierarchy of Locations that reflect your organizational structure.



- A. Click the **Locations All**  button on the RMC toolbar or, select **Tools|Locations>All** from the Tools Menu
A list of all the locations in the TRIM dataset will be displayed.



The list shows the type of locations that exist, such as Person, Group and Organization.

You may find it helpful to display the Locations List Toolbar when working with Locations. To do this, right-click anywhere on the Toolbar at the top of the TRIM Context screen and choose **Locations List**.



The following Toolbar will be displayed.



The icons are different for each of the various types of locations.

The following provides a description of these types of Locations.

Location Icon	Description
	Staff (Employee) Location (Green Icon)
	Contacts (Red Icon)
	External Organizations (Red Icon)
	Internal Organizations (Green Icon)
	Positions (not being used by Forests at this time) (Green Icon)
	Groups (Green Icon)
	Unknown (Gray Icon)
	All Locations (Red & Green Icon)
	All Internal Locations (Green Icon)
	All External Locations (Red Icon)
	Directory (Gray Icon)

External locations such as BC Archives, Offsite Locations and other Ministries are represented by red icons in TRIM and green icons represent Internal Ministry Locations. Internal locations also appear inside a border with the exception of the All Internal Locations icon.

Locations may be associated in the following ways:

Location Type	Associable Location Type
Person	Position or Organization
Organization	Organization
Group	Any Location Type

Contacts and Organizations operate in the same manner as other Locations (Persons, Positions etc), but are configured as External rather than Internal Locations.

The Organization Location is made up of two types:

Hierarchical	<i>For example:</i> Ministry of Forests - top level Branch - next level down
Physical	<i>For example:</i> Records Management Unit Database File Tech Records Storage

The following default locations have been set in TRIM and will appear on the Record Entry Form when creating a new record.

Owner Location{ XE

"Locations:Owner Location" Branch (Divisional Structure)
}

Home Location{ XE

"Locations:Home Location" Records Management Unit
}

Assignee{ XE

"Locations:Assignee" } Login User

5.3 User Roles{ XE "Locations:User Roles" }

Each type of Location is assigned a specific login role in TRIM. TRIM offers six different types of roles:

1. Administrator - most powerful and has more permissions than the other login types.
2. Information Manager - ranks next to the Administrator in terms of permissions.
3. Information Worker - (most of you will have this role) next level below Information Manager.
4. End User - basic user.
5. Inquiry User - viewing privileges only.

6. Custom User - Permissions can be customized for this type of user. Only the Administrator is authorized to customize/change user role permissions.

The following table shows the Location Usage Permissions for each of the different Login types:

Location Usage Permissions{ XE "Locations:Location Usage Permissions" }

TRIM Privileges	Login Type				
	Administrator	Information Manager	Information Worker	End User	Inquiry Only
Can be Record Home	Y	Y	Y	Y	Y
Can be Record Owner	Y	Y	Y	Y	Y
Can be Record Assignee	Y	Y	Y	Y	Y
Can be Record Contact	Y	Y	Y	Y	Y
Can be Record Requestor	Y	Y	Y	Y	Y
Can be Action/Activity Assignee	Y	Y	Y	Y	Y
Can be Activity Supervisor	Y	Y	Y	Y	N
Can have Private Access Control	Y	Y	Y	Y	Y

The following table shows the Record Update Permissions for each of the different login types:

Record Update Permissions{ XE "Locations:Record Update Permissions" }

TRIM Privileges	Login Type				
	Administrator	Information Manager	Information Worker	End User	Inquiry Only
Create Records	Y	Y	Y	Y	N
Modify Records	Y	Y	Y	N	N
Delete Records	Y	Y	N	N	N
Unfinalize	Y	Y	N	N	N
Create New Parts	Y	Y	Y	N	N
Modify Record Class	Y	Y	N	N	N
Manage Requests	Y	Y	Y	N	N
Record Administration	Y	Y	N	N	N
Record Administration	Y	N	N	N	N

(Restricted)					
Record Archivist	Y	Y	N	N	N
Document Update	Y	Y	Y	Y	N
Document Delete	Y	Y	Y	N	N
Append to Existing Notes	Y	Y	Y	Y	N
Can Save Record Searches	Y	Y	Y	Y	Y
Relate/Set Container for Records	Y	Y	Y	Y	N
Attach Contacts	Y	Y	Y	Y	N

These two tables reflect just some of the permissions that each user category has in TRIM.

6. Searches{ XE "Searches" }

TRIM Context offers a host of search methods by which you can locate records and other information in the repository. As an Information Worker you have permission to execute a variety of search methods. We will concentrate on a group that will be the core search methods you will use in TRIM Context.

6.1 Objectives

In this Chapter you will learn how to:

1. Perform a group of specific types of searches
2. Refine a search
3. Use the Filter and Sort features
4. Use Quick Find
5. Use some of the advanced features

Following completion of this chapter you will be able to perform different types of searches. You will also be able to test your knowledge of this topic by answering the questions at the end of this chapter.

6.2 Different Search Methods{ XE "Searches:Search Methods" }

TRIM has a large number of fields to select from when searching. You can select the Search Method via the KwikSelect or the Drop-down List. The '**Search By**' area is where you select the Search Method; that is, the TRIM field that you wish to search across. Once you have selected the Search Method, TRIM will display the appropriate search value options where you enter the corresponding criteria that the search must meet.

KwikSelect:

The KwikSelect  will open the Search Methods Dialogue Box. This dialogue box reveals all of TRIM's Search Methods divided into logical categories. To access a category click the plus sign to view the list of search methods for that category.

Drop-Down List:

The Drop-down List will display the most recently used Search Methods up to the last 25. This list will be empty until the first search is performed.

6.3 Search Values{ XE "Searches:Search Values" }

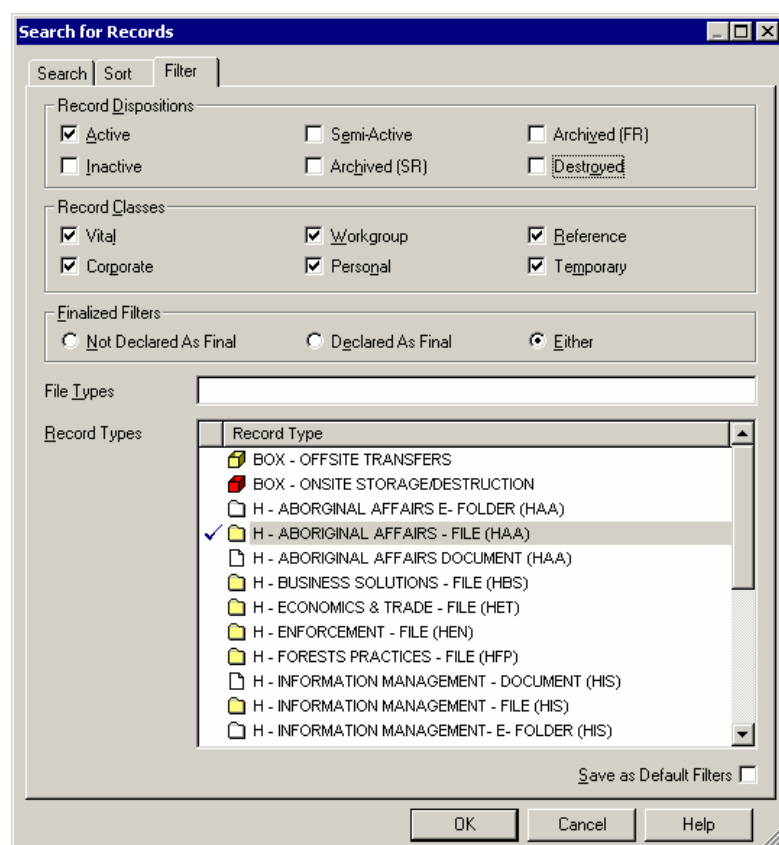
Depending on the Search Method selected, TRIM will change the name of the fields to those that you can enter in your search value. These are logically named and most fields will offer a KwikSelect  and/or Drop-down list to help you select a search value. These values will vary depending on the type of search method selected. For example, if you choose **Date Registered**, the search criteria field will require a date to be entered as a valid value.

6.4 Search Filters{ XE "Searches:Search Filters" }

A Search may be filtered, so that only certain records will be displayed in the Search Result Window. You can filter on:

- Disposition
- Record Class (Not used by Ministry of Forests)
- Finalized Document Status
- Record Type.

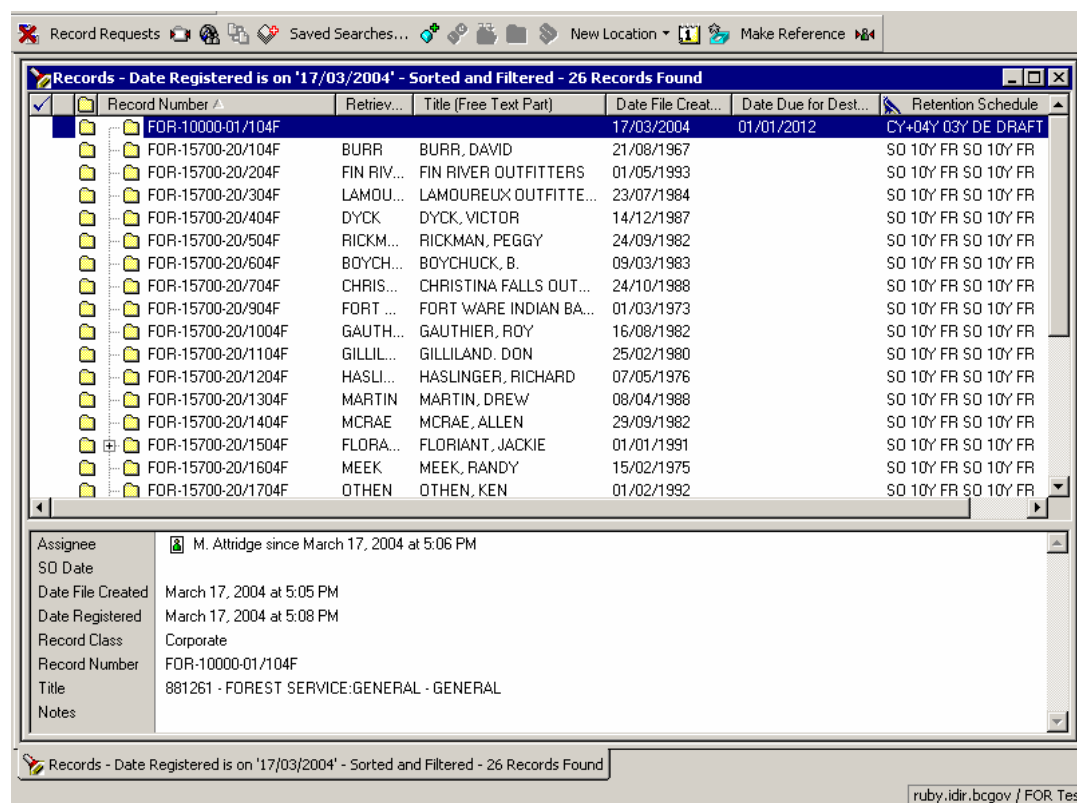
To Filter a Search, select the search method and then click on the Filter Tab and check the items you wish to have included in your search.



The Filter Tab allows you to narrow the search to only those items you have selected. To filter a search, select the search method and then click on the Filter Tab and check the items you wish to have included in your search. The filter can be saved, by checking the Save as

Default Filters checkbox. This action will force TRIM to only display those records that match these filters each time a search is conducted.

Here is the result of a Date Registered Search filtered on Headquarters Aboriginal Affairs File Record Type and Active Records. Finalized Filters applies only to electronic documents.



6.5 Sorting a Search{ XE "Searches:Sorting a Search" }

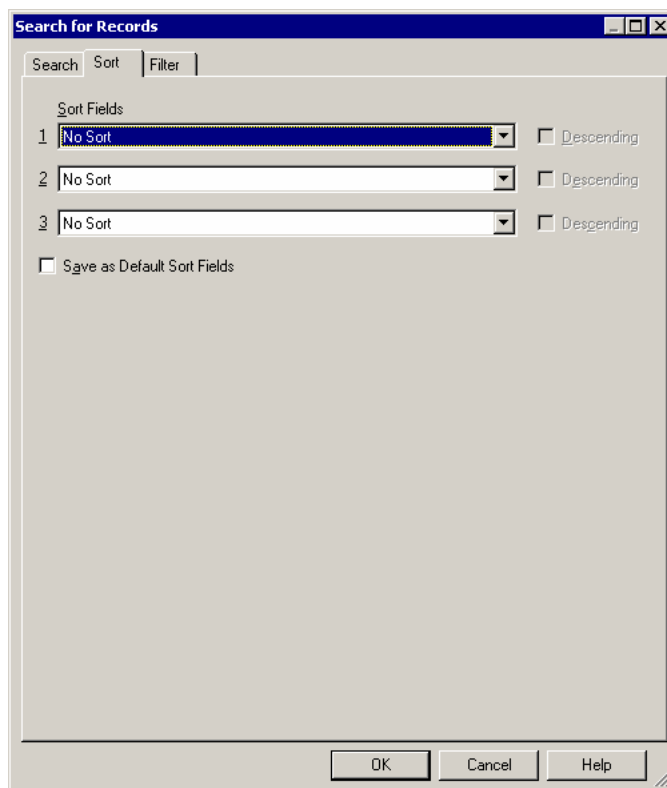
A Search can be sorted so that it is displayed in a specific order. You can sort via:

- Number
- Title (Free Text Part)
- Date Registered
- Date Created
- Date Due
- Date Closed
- Consignment Number
- Date Inactive
- Record Type
- Title (Structured Part)

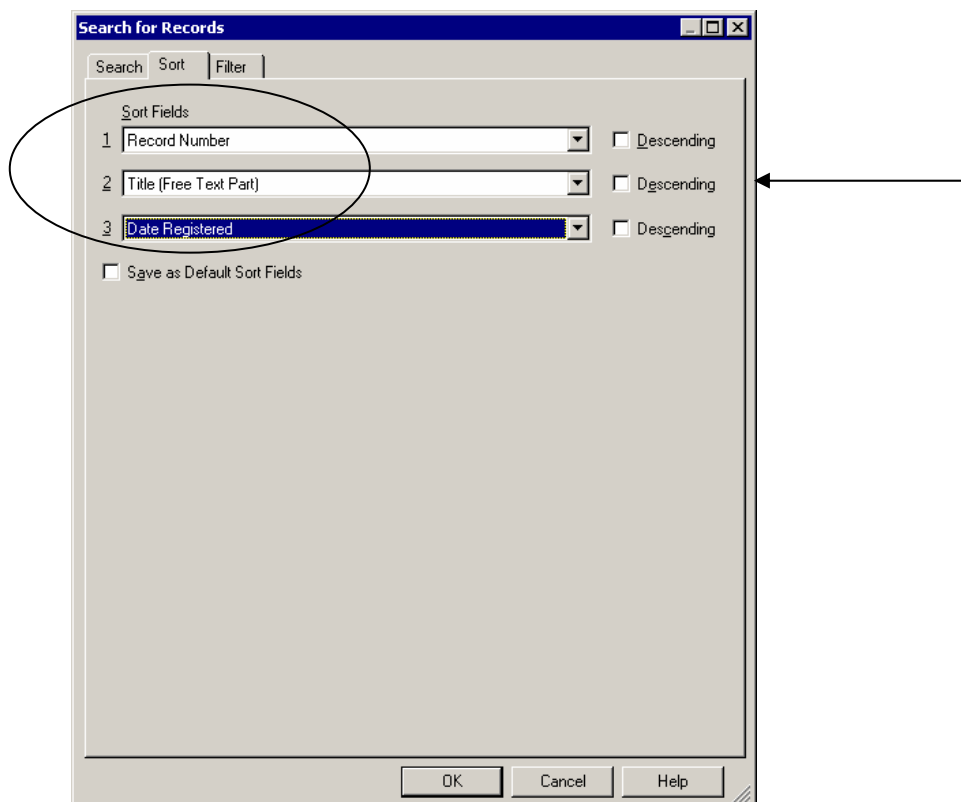
A search can be sorted by up to three fields. The first field takes precedence, then the second and finally the third field. Each Sort field can be displayed in either ascending or descending order. By default the Sort Field will be displayed in ascending order. To change to

descending order, check the Descending checkbox.

The Sort Tab{ XE "Sorting:Sort Tab" } defaults to No Sort in each of the fields. The Descending Checkbox is unavailable until you select a sort field.



Select the Fields you wish to sort on from the Drop-down list. You can change the sort order of a field by placing a checkmark in the Descending Checkbox next to that field.



The following screenprint shows the results of a Date Registered search and the records sorted according to Record Number, Free Text Title and Date File Created.

Records - Date Registered is between '01/03/2004' and '29/03/2004' - Sorted and Filtered					
Record Number	Retriev...	Title (Free Text Part)	Date File Creat...	Date Due for Dest...	Retention Schedule
ARCS-00220-20/104F~04	Capp	Cappraisal	03/03/2004		CY+02Y NIL SR CY+02Y
ARCS-01385-20/204F~01	Doyle, R	Doyle, Rowena	16/01/1987		SO NA NA SO NA NA
ARCS-01385-20/204F~02	Doyle, R	Doyle, Rowena	03/03/2004		SO NA NA SO NA NA
ARCS-01385-20/304F	Doyle, R	SUP Cassettee	03/03/2004		SO NA NA SO NA NA
ARCS-00132-01/104F			04/03/2004		SO+01Y NIL DE SO+01Y
ARCS-00925-20/3004F~01	Tonka ...	tonka	01/04/2003		SO NIL DE SO NIL DE
ARCS-00925-20/3004F~02	Tonka ...	tonka	04/03/2004		SO NIL DE SO NIL DE
ARCS-06450-20/3304F	ELECNO	Testing, delete	01/02/1999		SO 05Y SR SO 05Y SR
FOR-15700-20/104F	BURR	BURR, DAVID	21/08/1967		SO 10Y FR SO 10Y FR
FOR-15700-20/1904F	BARRON	BARRON, CAROLINE	21/08/1967		SO 10Y FR SO 10Y FR
FOR-15700-20/2004F	CUMMI...	CUMMINGS, ANN	21/08/1967		SO 10Y FR SO 10Y FR
FOR-15700-20/2104F	ARKLES	ARKLES, JOY	21/08/1967		SO 10Y FR SO 10Y FR
FOR-15700-20/2204F	BROOK...	BROOKES, WENDY	21/08/1967		SO 10Y FR SO 10Y FR
FOR-15700-20/2304F	YOUNG	YOUNG, JO-ANN	21/08/1967		SO 10Y FR SO 10Y FR
FOR-15700-20/2404F	HUNT	HUNT, CLIVE	21/08/1967		SO 10Y FR SO 10Y FR

Assignee	At Home Location: HBSRM - Business Solutions Branch - Records Management Centre since March 12, 2004 at 4:30 PM
Date File Created	March 3, 2004 at 10:49 AM
Date Registered	March 3, 2004 at 10:49 AM
Record Class	Corporate
Record Number	ARCS-00220-20/104F~04
Title	100001 - CONFERENCES, SEMINARS, SYMPOSIA - Conferences, seminars, symposia - Cappraisal
Notes	Volume 1 Coast Appraisal

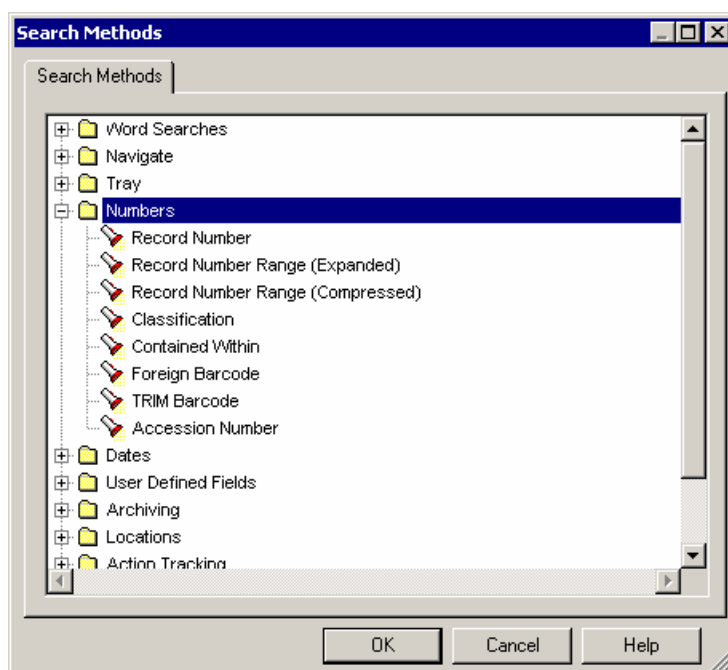
6.6 How to Perform a Search

Exercise 1

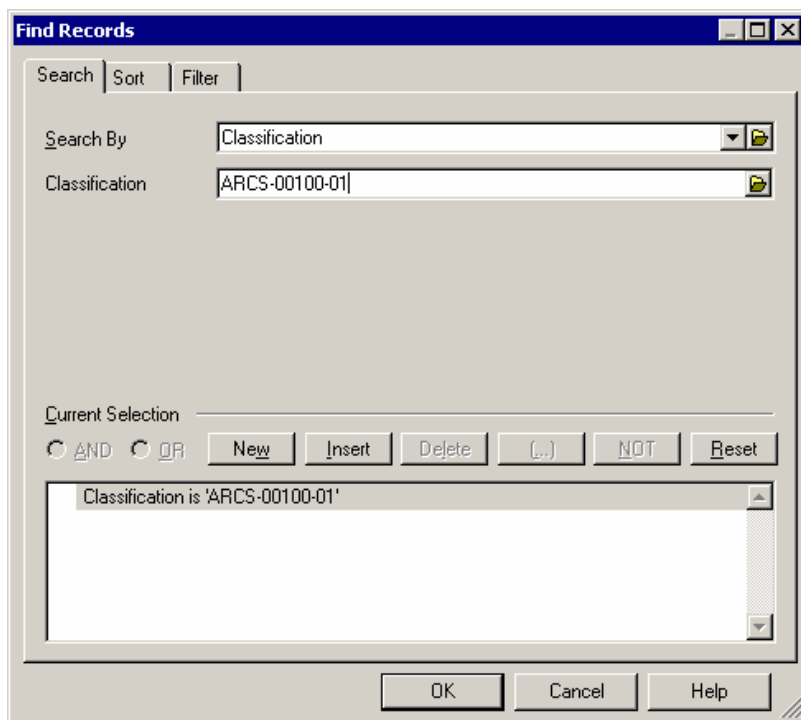
Performing a Classification No. Search

This exercise will demonstrate how to perform a **Classification No.** Search from Context. You should be at the main Context screen.

1. Click the  Find Records button on the toolbar.
2. Click the KwikSelect  button in the **Search By** field and choose **Numbers**.
3. Click on the + sign to expand the Numbers category.

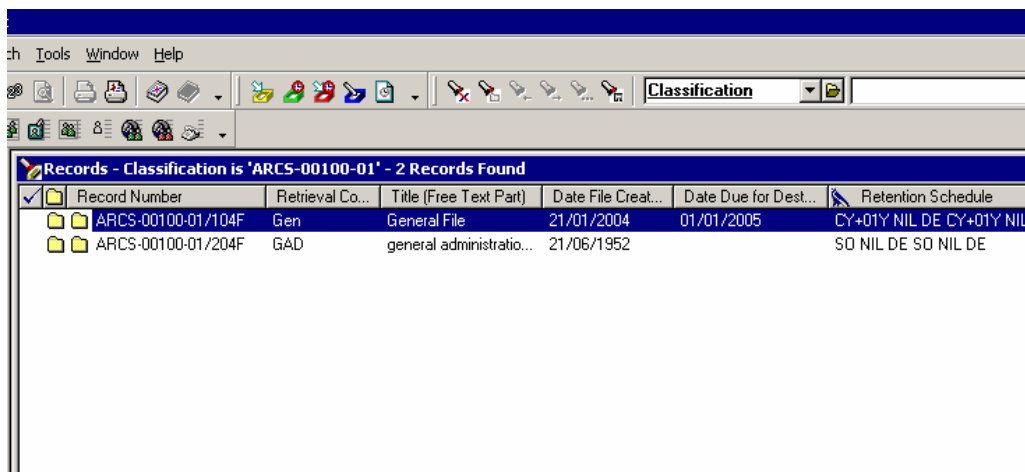


4. Select **Classification** from the list and click *OK*



The **Find Records** dialog box has tabs for **Search**, **Sort**, and **Filter**. The **Search** tab is active. It contains a **Search By** dropdown menu set to **Classification** and a text field for **Classification** containing the value **ARCS-00100-01**. Below these fields is a **Current Selection** section with radio buttons for **AND** and **OR**, and buttons for **New**, **Insert**, **Delete**, **[...]**, **NOT**, and **Reset**. A text area below shows the query: **Classification is 'ARCS-00100-01'**. At the bottom are **OK**, **Cancel**, and **Help** buttons.

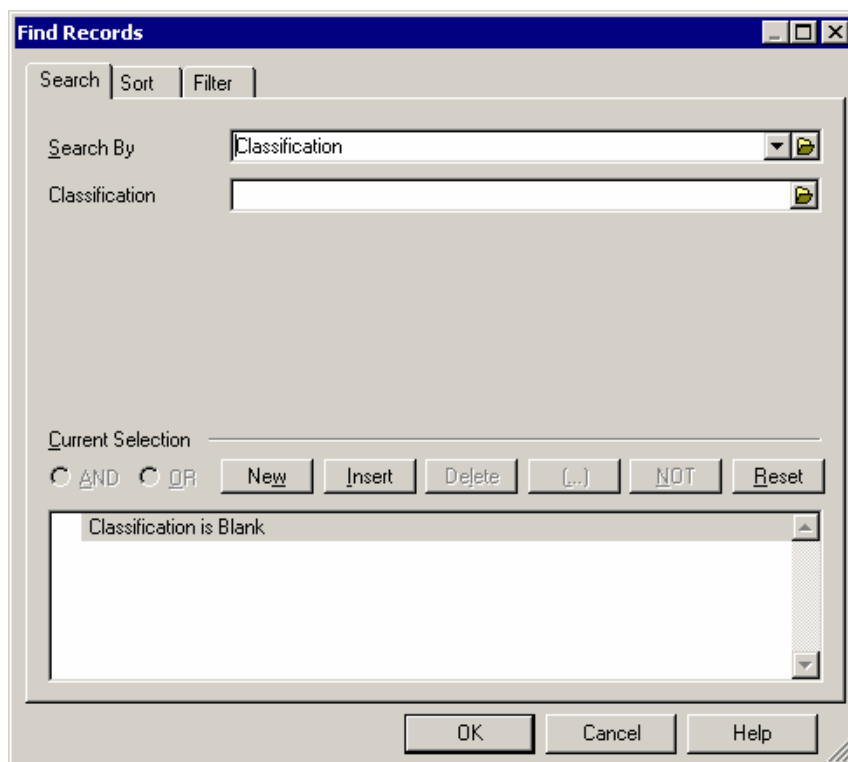
5. Type: ARCS-00100-01 in the **Classification** field and click **OK** to begin the search.
6. The search results should return all records classified against this number.



The main application window shows a toolbar with various icons and a dropdown menu set to **Classification**. Below the toolbar, a status bar indicates **Records - Classification is 'ARCS-00100-01' - 2 Records Found**. The main area displays a table of search results.

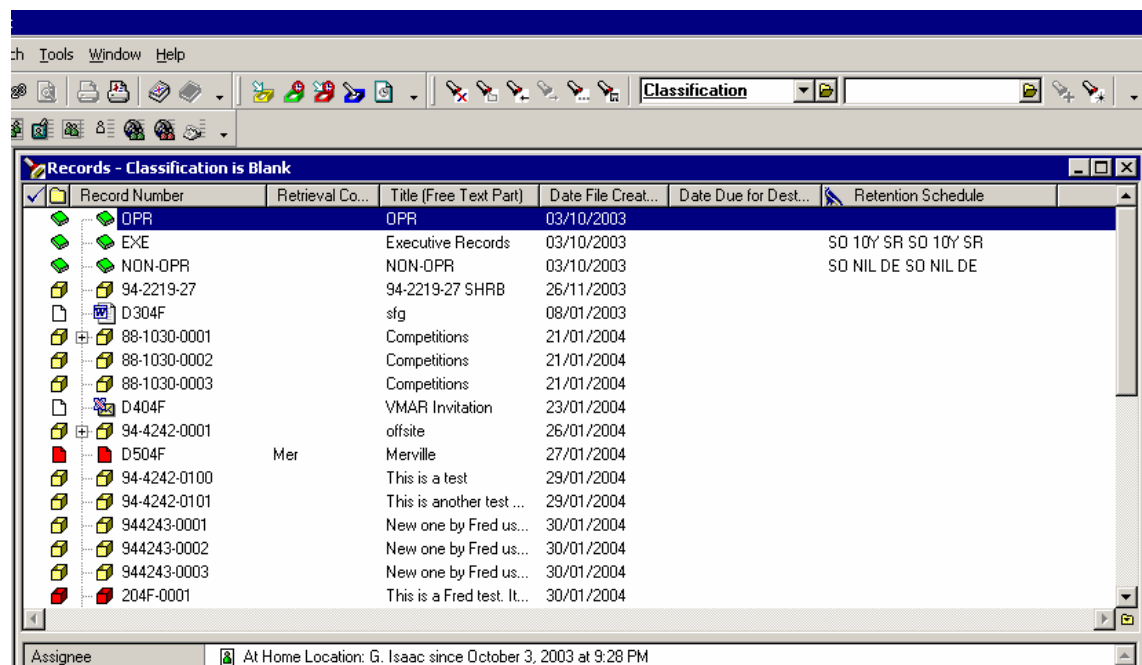
Record Number	Retrieval Co...	Title (Free Text Part)	Date File Creat...	Date Due for Dest...	Retention Schedule
ARCS-00100-01/104F	Gen	General File	21/01/2004	01/01/2005	CY+01Y NIL DE CY+01Y NIL
ARCS-00100-01/204F	GAD	general administratio...	21/06/1952		SO NIL DE SO NIL DE

7. To see all records, leave the **Classification** field blank and click **OK**.



8. TRIM will return a list of all records.

The following screenprint shows the first 17 records. The vertical scroll bar indicates there are more records to display.



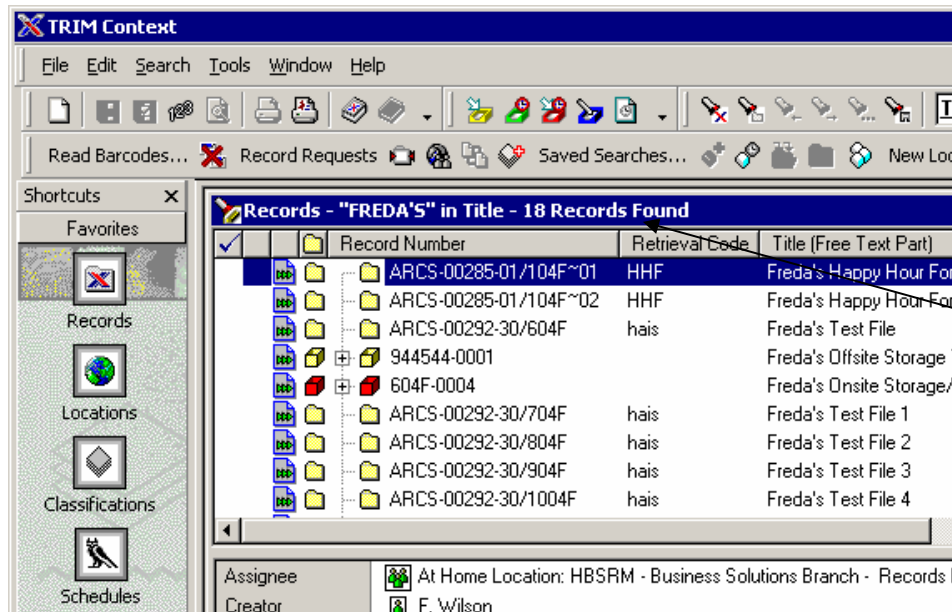
6.7 Count{ XE "Searches:Count" }

The Count Function enables you to display the number of records returned in a search. (In most cases the number of records returned will appear by default when a search is conducted.) The Count function can be accessed from the **Search Menu|Current Search>Count**, or by a right mouse click – Search - Count. Once a count has been performed the number of records will appear in a dialogue box.



Click **OK** to close the dialogue box.

The number of records will appear in the title of the search results screen.



6.8 Refining a Search{ XE "Searches:Refining a Search" }

When the resulting list is too long, or you want to refine the list to pinpoint the records you are looking for, you may refine the search.

- A. Press **[F7]** or, from the Menu, select **Search|Current Search>Refine Search**.
- B. Change the search as required. This can include adding/deleting information, filtering or sorting.

C. Click *OK* to begin the new search.

6.9 Quick Find{ XE "Searches:Quick Find" }

The Quick Find Function is available on the Search Toolbar. It will allow you to search on any of the Search Methods offered by TRIM Context.



Note: Only one field can be searched using the Quick Find function.

Insert the Search Method into the first Quick Find Field. The Search Method can be selected using the KwikSelect  or the Drop-down List. The Drop-down List reveals the last 25 search methods used with the Quick Search

Insert the Search Value into the Search Field. The Search Value may be typed directly into the Field or you may use the KwikSelect  or the Drop-down List. The Drop-down List reveals the last 25 search values used with the selected search method via the Quick Search. Once you have filled in both fields, press Enter on the Keyboard and the search results will be displayed.

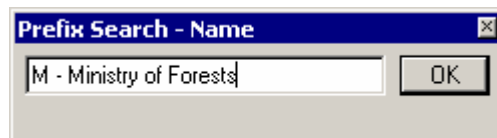
The Quick Find function is useful to search for a Barcode of a single file.

6.10 Advanced Searching{ XE "Searches:Advanced Searching" }

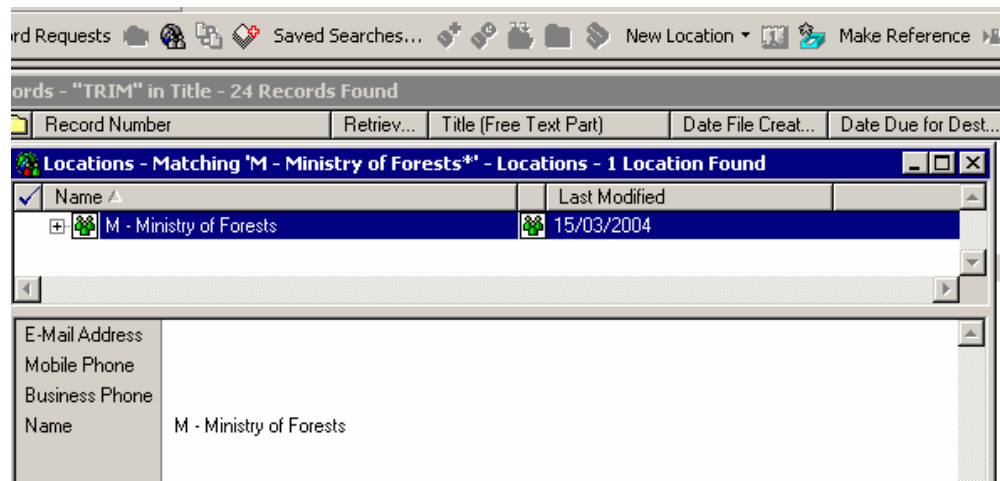
If required you can combine Search Methods to narrow a search result. This function can be done in a new Search, or when refining a Search;

- A. Open a new Search or refine an existing Search
- B. Insert the first Search Method and Search Value. If refining a search, this will already be displayed.
- C. Click **New** to insert a new search criteria
- D. Select the required Search Method and insert the Search Value
- E. Select the appropriate search combination tools: AND or OR
 - **AND** The AND combination will only return those records that meet all search criteria. This narrows a search, returning fewer records but pinpointing the required records.
 - **OR** The OR combination will return all records that meet any of the search criteria. This broadens a search, returning more records and including a wider subject range.
- F. Repeat Steps C to E until all search criteria is entered
Click *OK*.

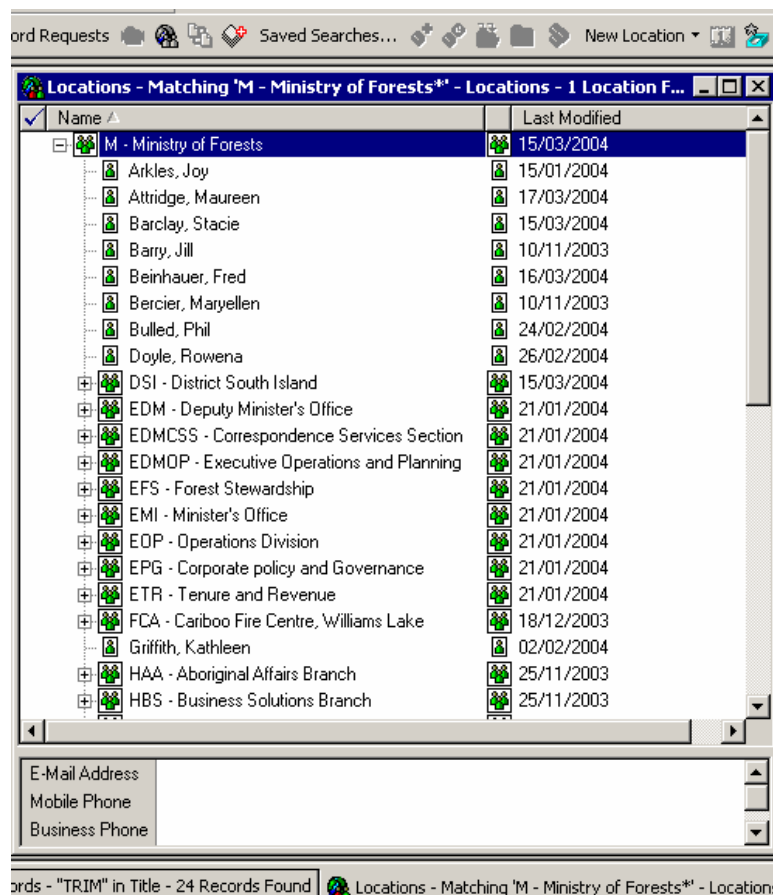
You can also do a Prefix Search for Ministry of Forests by typing:



This will return the Ministry of Forests Location:



Click the + sign to expand the location to show all subsidiary locations.



6.11 Other Advanced Features{ XE "Searches:Other Advanced Features" }

- New:** The **New** Button adds a new line to your search and the bottom of your existing criteria.
- Insert:** The **Insert** Button will add a new line to your search above the currently selected criteria.
- Delete:** The **Delete** Button will delete the currently selected search criteria from the Current Selection Box.
- (...):** The Brackets (...) Button will enable you to group search criteria together. This has the effect of mathematical brackets, whereby lines that are bracketed are always dealt with together as one, and will precede any other operations. The Brackets (...) Button will remain grayed out until two or more search lines are selected.

To select multiple lines:

- Using the Mouse, click in front of a search criterion
- Click in front of another search criterion.
These search criteria will now be tagged and any operation performed will affect all tagged criterion.

Not: The **Not** Button will enable you to exclude records that have a specified value from the search results. If you have tagged search criteria the Not function will exclude all tagged criterion.

Reset: The Reset Button will delete (once you confirm) all search criteria from the Current Selection Box, allowing you to compose a new Search.

6.12 Other Search Functions{ XE "Searches:Other Search Functions" }

Below is a table of other items available under the Search Menu.

Current Search		
	Go Back	Will go back to a previous search result still open in TRIM
	Go Forward	Will go forward to a search result still open in TRIM
	Go to Search	Allows you to select a search result still open in TRIM
	Count	Will count the current search results.

Navigation		
	Select Favorites	Will find all records in your favorite records hold.
	Related Records	Will find all records related to the currently selected record.
	Latest Part	Will find the latest part of the currently selected record.
	All Parts	Will find all parts of the currently selected record.
	All Versions	Will find all versions of the currently selected record.
	Latest Version	Will find the latest version of the currently selected record.
	Linked Documents	Lists all linked documents of the currently selected record. This is for compound documents only.
	Document Link Of	List all records that are using the currently selected record as a link. This is for compound documents only.
	Container Record	Will find the container of the currently selected record.
	Contained Records	Will find all records contained within the currently selected record.
	Records With Same Contacts	Will find all records that share a contact with the currently selected record.
	Client Records For Contact(s)	Will find all records (titled by client) that share a contact with the currently selected record.
	Series Record	Will find the series record attached to the currently selected record.
	Record Within Series	Will find all the records contained within the selected series record.
TRIM Trays		
	Recent Containers	Displays up to 25 recent containers used by the logged in user.
	Recent Documents	Displays up to 25 recent electronic documents used by the logged in user.
Favorites		
	Records	Displays your Favorite Records
	Locations	Displays your Favorite Locations.
	Workflows	Displays your Favorite Workflows.
	Classifications	Displays your Classifications.
	Schedules	Displays your Favorite Schedules
	Thesaurus Terms	Displays your Favorite Thesaurus

		Terms
	Saved Searches	Displays your Favorite Saved Searches

6.13 How Do I Search for Records?

Exercises - Searches{ XE "Exercises:Searches" }

Exercise 1 Performing a Title Word Search

This exercise will demonstrate how to perform a **Title Word** Search from Context.

1. You should be at the main Context screen.
2. Click the  Find Records button on the toolbar.
3. Choose **Title Word** as the **Search By** method in the Search Tab screen.
4. Type the word: First in the **Equal To** field and click *OK* to begin the search.
5. The search results should return all records containing the word **First** in the title.
6. If more than one record is listed, highlight the record that you created today.
7. View the record and then exit from the record.

Exercise 2 Performing a Title Word Search

Complete the exercise below to search for a document using the **Title Word** Search based on the steps learned in the previous exercise

1. You should be at the main Context screen.
2. Search for a document that you created using the Title Word Search.
3. If more than one record is listed, choose one of the records and view the information.
4. Exit from the record.

Exercise 3 Performing a Date Search

This exercise will demonstrate how to perform a **Date Registered** Search from Context.

1. You should be at the Context screen.
2. Click the  Find Records button on the toolbar or press [F7] to refine an existing search.
3. Choose **Date Registered** as the **Search By** method in the Search Tab screen.
4. Enter today's date in the **Date From** and **Date To** fields and click *OK* to begin the search.
5. The search results should return all records that were registered today.
6. If more than one record is listed, highlight any of the records that you created today.

7. View the record and then exit from the record.

Exercise 4

Performing a Date Search

Complete the exercise below to search for a document using the **Date Created** search based on the steps learned in the previous exercise.

1. You should be at the Context screen.
2. Search for a record that was created today.
3. The search results should return all records that were created today.
4. If more than one record is listed, highlight any of the records that you created today.
5. View the record and then exit from the record.

Exercise 5

Using the Quick Find Function

This exercise will demonstrate how to perform a search using the **Quick Find** function.

1. You should be at the TRIM Context™ main screen.
2. Choose **Date Registered** from the Drop-Down List or click on the Folder from the Quick Find field on the toolbar to go to the Search Categories and choose Date as the **Search By** method in the Search Tab screen.
3. Tab to the **Search Criteria** field and select **Today** from the Drop-Down list and press <Enter> to begin the search. If Today is not listed then click on the Calendar button and choose today's date and click **OK**.
4. The search results should return all records that were registered today.
5. If more than one record is listed, highlight any of the records that you created today.
6. View the record and then exit from the record.

Exercise 6

Using the Quick Find Function

Complete the exercise below to perform a **Date Created** Search using the **Quick Find** function based on the steps learned in the previous exercise.

1. Search for a record that was created today.
2. The search results should return all records that were created today.
3. If more than one record is listed, highlight any of the records that were created today.
4. View the record and then exit from the record.

Exercise 7

Searching for Assignee

This exercise will demonstrate how to perform a search using the **Locations** search method

1. You should be at the TRIM Context™ main screen.
2. Click the  Find Records button on the toolbar or press [F7] to refine an existing search.
3. Select **Locations** as the search method
4. Click the + sign to expand the Locations list and choose **Assignee**.

5. Click the KwikSelect  button and search for your name.
6. The search results should return all records where you are the Assignee.

Exercise 8**Searching for Assignee**

Complete the exercise below to perform an **Assignee** Search based on the steps learned in the previous exercise.

1. You should be at the TRIM Context™ main screen.
2. Press [F7] to refine an existing search or click the  Find Records button on the toolbar.
3. Select **Locations** as the search method
4. Click the + sign to expand the Locations list and choose **Assignee**.
5. Click the KwikSelect  button and search for another location as the Assignee.
6. The search results should return all records listing the Assignee you selected.

Exercise 9**Performing an Advanced Search**

This exercise will demonstrate how to perform an advanced search using **AND** and **OR** statements known as the **Boolean** search method.

1. You should be at the TRIM Context™ main screen.
2. Press [F7] to refine an existing search or click the  Find Records button on the toolbar.
3. Select **Creator** as the first search method.
4. The Equal To field should default to your name.
5. Click the **New** button under Current Selection in this screen.
6. Leave the **And** radio button checked.
7. Go back to the Search method above and change **Creator** to **Date Registered**.
8. The **Date From** and **Date To** fields should be populated with today's date.
9. Click **OK** to begin the search.
10. The search results screen should return records that were created by you and that were registered today.

Exercise 10**Performing an Advanced Search**

Complete the exercise below to perform a **Boolean** Search based on the steps learned in the previous exercise.

1. You should be at the TRIM Context™ main screen.
2. Press [F7] to refine an existing search or click the  Find Records button on the toolbar.
3. Search by **Date Created AND** records **created by you**.
4. Check the results to make sure they match the search criteria.

Exercise 11**Performing an Advanced Search**

Complete the exercise below to perform a **Boolean** Search using the OR statement instead of AND based on the steps learned in the previous exercise.

1. You should be at the TRIM Context™ main screen.
2. Press [F7] to refine an existing search or click the  Find Records button on the toolbar.
3. Search by **Creator OR** records **by Date Registered**.
4. Check the results to make sure they match the search criteria.

Exercise 12

Searching for a Record Number

This exercise will demonstrate how to search for a **Record Number**.

1. You should be at the TRIM Context™ screen.
2. Press [F7] to refine an existing search or click the  Find Records button on the toolbar.
3. Click the KwikSelect  button and select **Numbers** as the Search By Method.
4. Expand the **Numbers** category and choose **Record**.
5. Enter the record number and click *OK* to begin the search.

Exercise 13

Performing a Record Classification Name Search

This exercise will demonstrate how to search for a **Record Classification Name**.

1. You should be at the TRIM Context™ screen.
2. Press [F7] to refine an existing search or click the  Find Records button on the toolbar.
3. Click the KwikSelect  button and select **Words** as the Search By Method.
4. Expand the **Words** category and choose **Classification**.
5. Type: Policy as the classification word and click *OK* to begin the search.

Exercise 14

Performing a Record Classification Name Search

Complete the exercise below to perform a **Classification Name** Search based on the steps learned in the previous exercise.

1. You should be at the TRIM Context™ screen.
2. Press [F7] to refine an existing search or click the  Find Records button on the toolbar.
3. Click the KwikSelect  button and select **Words** as the Search By Method.

4. Expand the **Words** category and choose **Classification**.
5. Type: Certification as the classification word and click *OK* to begin the search.

Exercise 15 Performing a Missing Record Search

This exercise will demonstrate how to search for a **Missing Record**. There is no search value required for this type of search.

1. You should be at the TRIM Context™ screen.
2. Press [**F7**] to refine an existing search or click the  Find Records button on the toolbar.
3. Click the KwikSelect  button and select **Miscellaneous** as the Search By Method.
4. Expand the **Miscellaneous** category and choose **Missing Records**.
5. Click *OK* to begin the search.

Exercise 16 Performing a Missing Record Search

Complete the exercise below to perform a **Missing Record** Search based on the steps learned in the previous exercise.

1. You should be at the TRIM Context™ screen.
2. Press [**F7**] to refine an existing search or click the  Find Records button on the toolbar.
3. Click the KwikSelect  button and select **Miscellaneous** as the Search By Method.
4. Expand the **Miscellaneous** category and choose **Missing Records**.
5. Click *OK* to begin the search.

Exercise 17 Performing a Not at Home Location Search

This exercise will demonstrate how to search for a **Not at Home Location record**. This means searching for records not currently assigned to their Home Location (that is, records whose Assignee Location does not match their Home Location)

1. You should be at the TRIM Context™ screen.
2. Press [**F7**] to refine an existing search or click the  Find Records button on the toolbar.
3. Click the KwikSelect  button and select **Locations** as the Search By Method.
4. Expand the **Locations** category and choose **Not at Home Location**.
5. You can change the default location of yourself (defaults to the logged in user) in the **Location** field or leave it as is.
6. Click *OK* to begin the search.

Exercise 18 Performing a Not at Home Location Search

Complete the exercise below to perform a **Not at Home Location** search based on the steps learned in the previous exercise.

1. You should be at the TRIM Context™ screen.
2. Press [F7] to refine an existing search or click the  Find Records button on the toolbar.
3. Click the KwikSelect  button and select **Locations** as the Search By Method.
4. Expand the **Locations** category and choose **Not at Home Location**.
5. Leave the **Location** field blank and TRIM will return all records where the Assignee does not match their Home Location.
6. Click **OK** to begin the search.

Exercise 19 Performing a TRIM Barcode Number Search

This exercise will demonstrate how to search for a **TRIM Barcode Number record**.

1. You should be at the TRIM Context™ screen.
2. Press [F7] to refine an existing search or click the  Find Records button on the toolbar.
3. Click the KwikSelect  button and select **Numbers** as the Search By Method.
4. Expand the **Numbers** category and choose **TRIM Barcode**.
5. Enter the barcode number.
6. Click **OK** to begin the search.

Exercise 20 Performing a Foreign Barcode Number Search

This exercise will demonstrate how to search for a **Foreign Barcode Number record**.

1. You should be at the TRIM Context™ screen.
2. Press [F7] to refine an existing search or click the  Find Records button on the toolbar.
3. Click the KwikSelect  button and select **Numbers** as the Search By Method.
4. Expand the **Numbers** category and choose **Foreign Barcode**.
5. Enter the barcode number.
6. Click **OK** to begin the search.

6.14 Questions

Here are a few questions to test yourself on what you have learned in this chapter. Circle the letter next to the correct answer(s) where the question is a multiple choice:

1. List some of the Search Methods available in TRIM:

2. It is possible to filter searches in TRIM to narrow the search:
- a. True.
 - b. False.

3. What is the purpose of the Quick Find Function?

4. TRIM Context™ permits combining search methods:
- a. True.
 - b. False.

5. Explain what is meant by a Boolean search:

6. Which search method is used to perform an Assignee search?

7. What parameters can be used when combining search methods?

8. What is a Prefix Search?

6.15 Summary

In this Chapter you learned how to:

1. Perform a group of specific types of searches
2. Refine a search
3. Use the Filter and Sort features
4. Use Quick Find
5. Use some of the advanced features

You should now understand how the search function works in TRIM and be able to perform different types of searches.

7. Saving Searches{ XE "Searches:Saving" }

TRIM Context provides the functionality to save searches. This is useful when you are performing certain types of searches on a regular basis. The following exercises will step you through the process of saving a search.

It is possible to save search criteria for future use. This is helpful if you regularly conduct the same search. A TRIM user can save and delete his/her saved searches at any time.

Note: TRIM saves the search criteria and not the search results, so you will always get the latest information.

7.1 Objectives

In this Chapter you will learn:

1. How to Save Searches
2. How to Use Saved Searches
3. About Meta-variables

Following completion of this chapter you will be able to save and use different types of searches as well as understand the use of meta-variables. You will also be able to test your knowledge of this topic by answering the questions at the end of this chapter.

To save a search:

- A. Perform the search you wish to save.
- B. From the Menu, select **File|Save Search**.
- C. The Save Search Wizard will appear, enter the following details:
 - a. **Search Name:** Enter a name for your search. Choose a name that will be easy to identify the next time you use the saved search list. Maximum of 30 characters. Each Saved Search name must be unique to the database.
 - b. **Description:** The description field enables you to enter a more detailed description of the search. By default TRIM inserts the search method and value.
 - c. Click **Next**.
 - d. The Search Details will be displayed again. If required, edit these details.
 - e. Click **Next**.
 - f. Select any appropriate sort details.
 - g. Click **Next**.
 - h. Select any appropriate filters.
 - i. Click **Finish**.

When saving searches that use dates e.g., Date Registered, you have a choice of using a fixed date or a meta-variable. If you want to do a daily search for records registered that day, rather than using a fixed date (6/6/02) it is best to use the meta-variable Today. This way you will

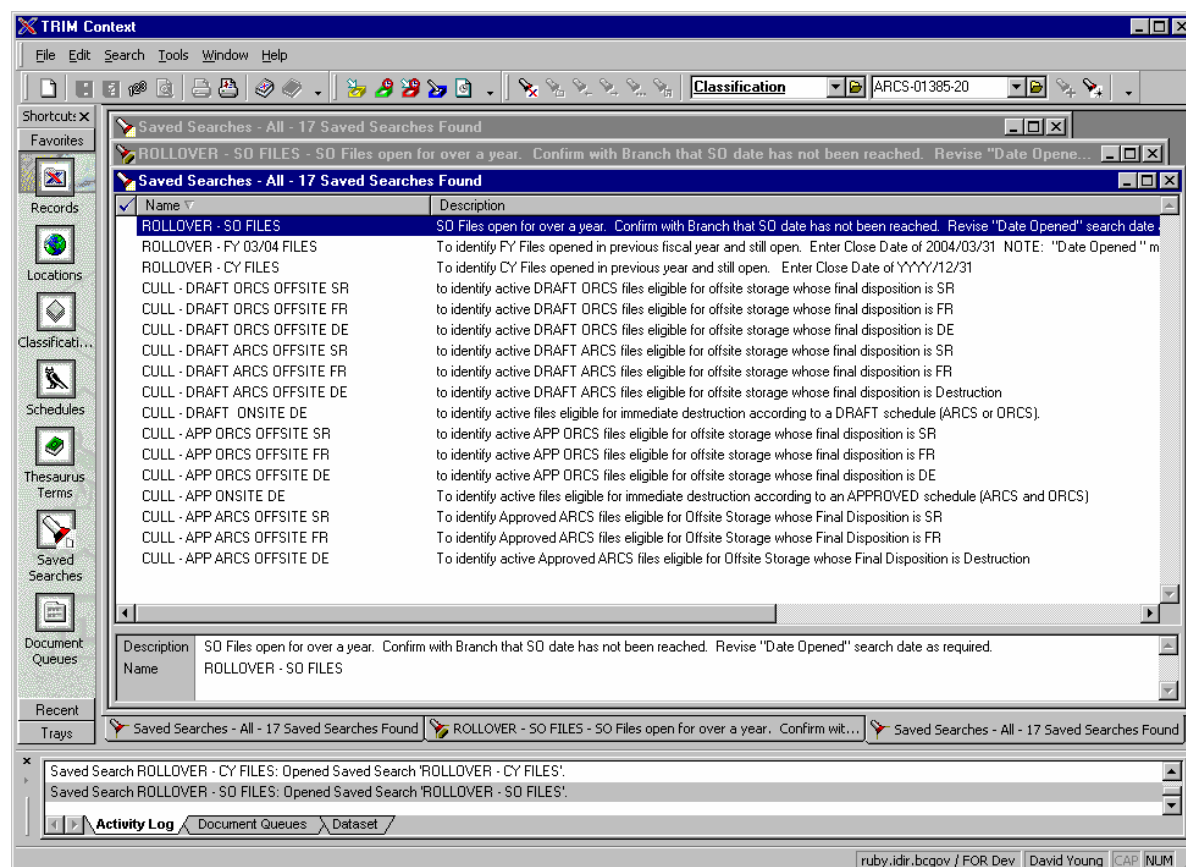
always get the current days records. You can choose from the following meta-variables:

- Yesterday
- Today
- This Month
- This Week
- Previous Week
- Tomorrow
- Next Month
- Next Week
- Previous Month
- Year to date

7.2 Accessing a Saved Search{ XE "Searches:Accessing a Saved Search" }

- A. From the Search Menu, select Saved Searches (or press [Ctrl][G])
A list of all available Saved Searches will appear.
- B. Double Click on the desired Search and the results will be displayed.

The following screenprint shows a global list of available Saved Searches that you can access:



7.3 How Do I Save Searches?

Exercises - Saving Searches{ XE "Exercises:Saving Searches" }

Exercise 1

Saving a Search

This exercise will demonstrate how to save a search for future use.

1. You should be at the TRIM Context™ main screen.
2. Click the  Find Records button on the toolbar.
3. Search for records created by you.
4. When the results are displayed click the  Save Record Search button on the toolbar.
5. Type: Records Created By Me in the **Search Name** field.
6. Click the **Next** button to accept the description and go to the next screen.
7. Click the **Next** button to accept the access controls and go to the next screen.
8. Click the **Next** button to accept the sort fields and go to the next screen.
9. Click the **Finish** button to accept the record types in the filter tab and complete the Saved Search information.
10. Click the **Saved Searches** button on the RMC toolbar to see the newly saved search.
11. Double-click the new search to see the latest results.

Exercise 2

Saving a Search

Based on the steps learned in the previous exercise, create and save a new search.

1. You should be at the TRIM Context™ main screen.
2. Click the  Find Records button on the toolbar.
3. Search for records registered today.
4. Save the search as: **Records Registered Today**.
5. Locate and run the newly saved search.

7.4 Questions

Here are a few questions to test yourself on what you have learned in this chapter. Circle the letter next to the correct answer(s) where the question is a multiple choice:

1. Can a search be saved be modified?
 - a. Yes.
 - b. No.
2. What is a meta-variable?

3. How is a Saved Search accessed in TRIM?

4. Briefly describe how to save a search in TRIM.

5. Can a saved search be removed from the list of saved searches?
 - a. Yes.
 - b. No.
6. What type of saved search could be used to identify calendar year files that are still open from the previous year?

7. List some of the meta-variables that can be used in a search?

7.5 Summary

In this Chapter you learned:

1. How to Save Searches
2. How to Use Saved Searches
3. About Meta-variables

You should now be able to save and use different types of searches as well as understand the use of meta-variables.

8. Favorites{ XE "Favorites" }

The Favorites Toolbar at the left of the TRIM Context™ main screen allows you to add several different kinds of searches to this toolbar for fast and easy access each time you need to invoke a specific type of search.

8.1 Objectives

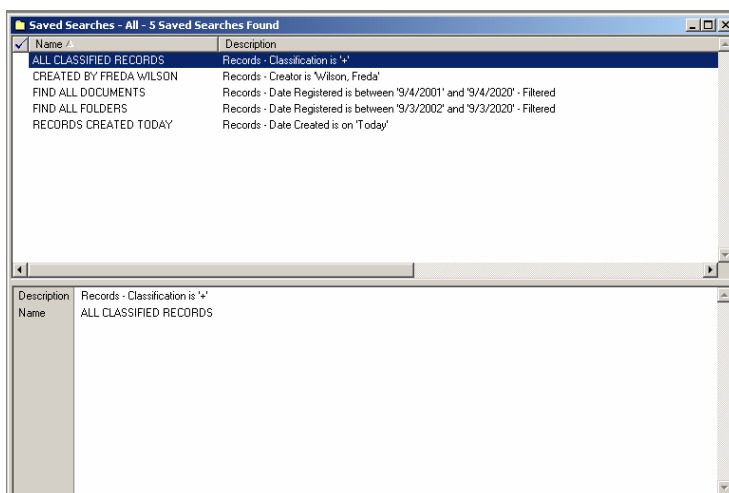
In this Chapter you will learn how to:

1. Add and remove Saved Searches to Favorites
2. Add and remove Classifications to Favorites

Following completion of this chapter you will be able to add and remove saved searches and classifications to your Favorites.

8.2 Adding a Search to Favorites{ XE "Favorites:Adding a Search to Favorites" }

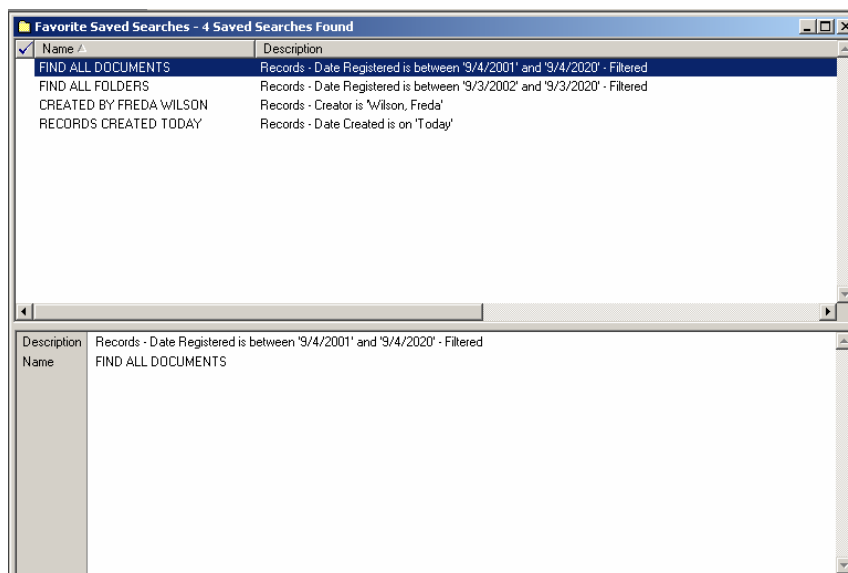
TRIM makes it easy to add a Saved Search to your Favorites toolbar. From the Menu, select **Search|Saved Searches**, or press **[Ctrl][G]**. A screen similar to the following will appear:



- A. Tag all or specific saved searches that you wish to add to your Favorites by clicking to the far left of the row (under the checkmark).
- B. Press **[F4]** or, choose **Edit|Add To|Add to Favorites** from the menu bar. Your saved searches are now in your favorites.



To view your saved searches in your favorites, click the Saved Searches icon in the Favorites toolbar. The Favorites Saved Searches dialogue box will be displayed. A screen similar to the following will appear:



You will be able to add any of the saved searches already created by the TRIM Administrator to your Favorites.

Exercises - Favorites{ XE "Exercises:Favorites" }

Exercise 1 Adding a Search to your Favorites

This exercise will demonstrate how to add a **Saved Search** to your Favorites.

1. Select **Search|Saved Searches** from the menu or press [Ctrl][G].
2. Highlight the **Records Registered Today** search.
3. Choose **Edit|Add To|Add to Favorites** from the menu.
4. This saved search is now added to your Favorites.



5. Click the Saved Searches button on the Favorites toolbar.
6. Double-click on the **Records Registered Today** search and the results will be displayed.

Exercise 2 Adding a Search to your Favorites

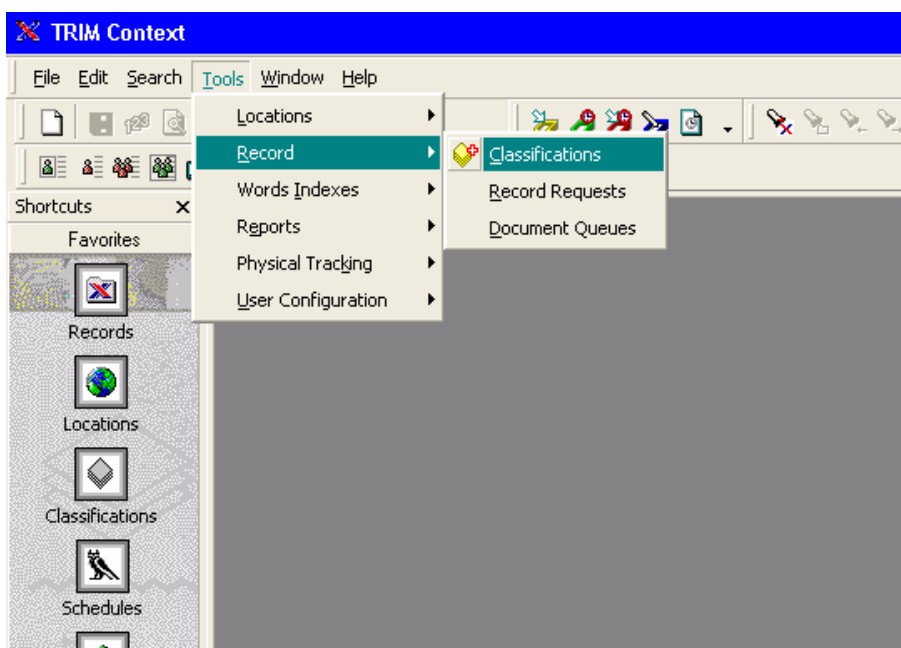
Complete the exercise below to add a Saved Search to your Favorites, based on the steps learned in the previous exercise

1. Select the **Records Created By Me** saved search.
2. Add it to your Favorites toolbar.

3. Run the newly saved search from the Favorites Toolbar to see the results.

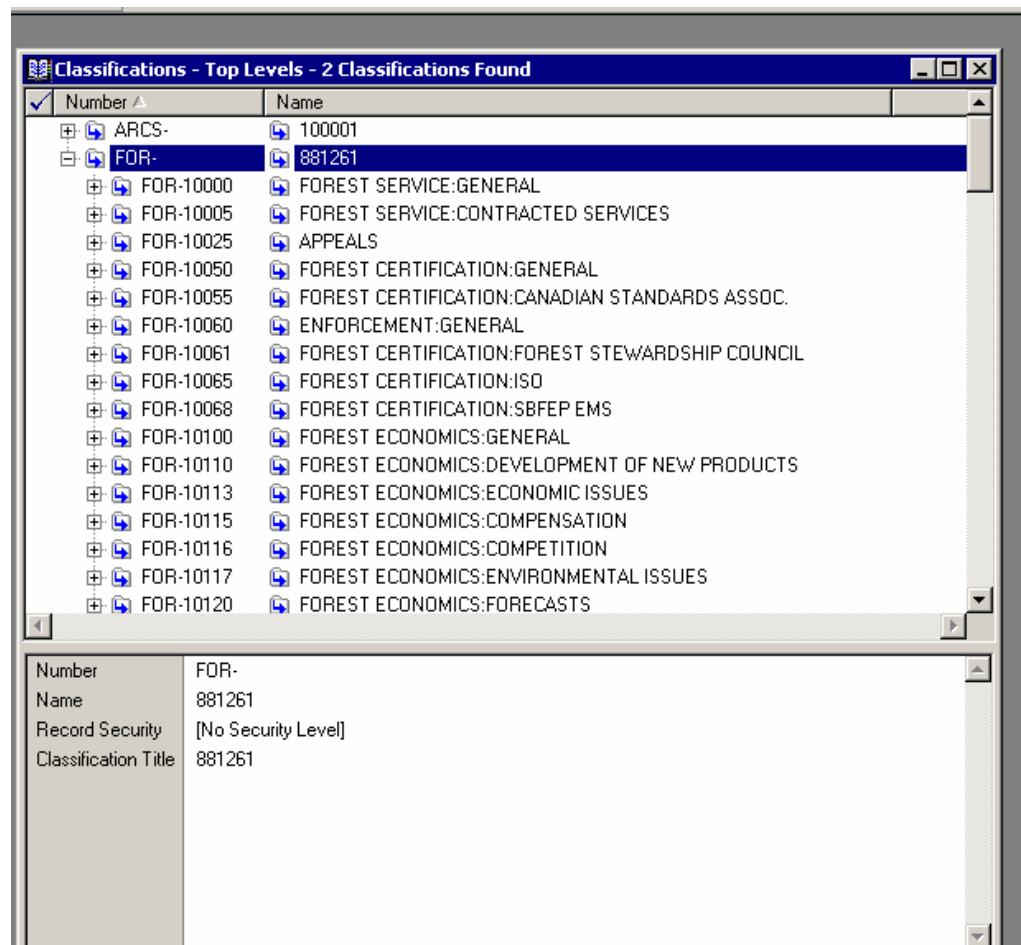
8.3 How Do I Add Classifications to Favorites{ XE "Favorites:Add Classifications to Favorites" }?

TRIM makes it easy to add many of the functions you perform on a regular basis to your Favorites toolbar. You can add your most frequently used classifications to Favorites for quick reference when classifying a file in TRIM. Record Classifications are accessed from the **Tools|Records>Classifications** Menu.

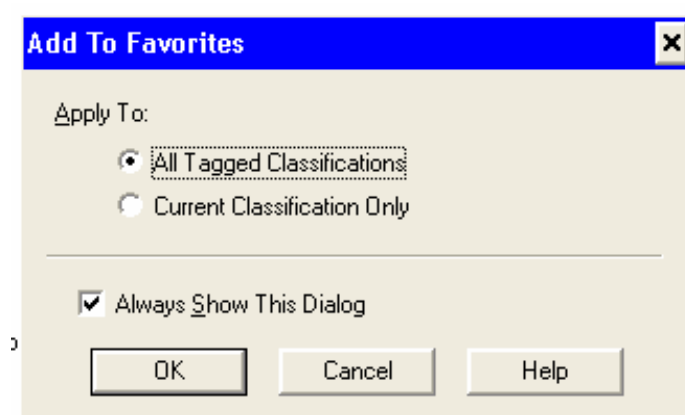


A. Choose **Classifications**

The following list of classifications will appear:



- B. Expand the ARCS/ORCS levels of classification that you use on a regular basis.
- C. As you expand each level, place a checkmark to the left of each classification that you want to use.
- D. Press **[F4]** once you have checked all the desired levels.
- E. Click **OK** to add all tagged classifications to the Favorites toolbar.



- F. Click the **Classifications** button on the Favorites toolbar to see the result.

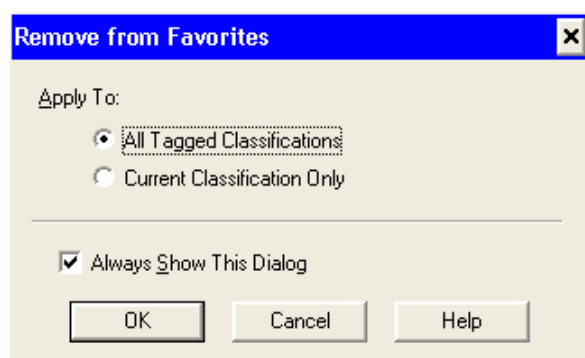
8.4 How Do I Remove Classifications from Favorites{ XE "Favorites:Remove Classifications from Favorites" }?

You can also remove classifications from your Favorites toolbar. To do this:



- A. Click the Classifications button on the Favorites toolbar.
- B. Press [Ctrl][A] to tag all classifications or checkmark only those you wish to remove.
- C. Choose **Edit|Remove From>Remove From Favorites** from the Menu.

If you tagged all classifications, you will be prompted by the following dialogue box:



- D. Click *OK* to remove the classifications from Favorites.



- E. Click the Classifications button to confirm the removal.

Try the following exercises to test adding classifications to and removing from the Favorites toolbar.

Exercises - Favorites{ XE "Exercises:Remove Classifications from Favorites" }

Exercise 1

Adding Classifications to Favorites

This exercise will demonstrate how to add **Classifications** to Favorites.

1. Select **Tools|Records>Classifications** from the menu.
2. Expand the **ARCS/ORCS** classifications.
3. Highlight the **ORCS Top Level Classification FOR-10110**
4. Press [F4] to add to **Favorites**.
5. Click *OK* to add the tagged Classifications.
6. The Classifications are now added to Favorites.
7. Click the Classifications button on the Favorites toolbar.



8. The Classifications you selected will be displayed.

Exercise 2**Adding Classifications to Favorites**

Complete the exercise below to add Classifications to Favorites based on the steps learned in the previous exercise.

1. Select **Tools|Records>Classifications** from the menu.
2. Expand the **ARCS/ORCS** classifications.
3. Tag the **ARC/ORCS Classification Levels** you wish to add to Favorites
4. Press **[F4]** to add to **Favorites**.
5. Click **OK** to add the tagged Classifications.
6. The Classifications are now added to Favorites.



7. Click the Classifications button on the Favorites toolbar.
8. The Classifications you selected will be displayed.

Exercise 3**Removing Classifications to Favorites**

This exercise will demonstrate how to **remove Classifications** from Favorites.



1. Click the Classifications button on the Favorites toolbar.
2. Tag the classifications you wish to remove.
3. Choose **Edit|Remove From>Remove From Favorites** from the Menu.
Click **OK** to remove the tagged Classifications.



4. Click the Classifications button on the Favorites toolbar to confirm they are now removed from Favorites.

Exercise 4**Removing Classifications to Favorites**

Practice removing other classifications from the Favorites toolbar.

8.5 Questions

Here are a few questions to test yourself on what you have learned in this chapter. Circle the letter next to the correct answer(s) where the question is a multiple choice:

1. What is the purpose of the Favorites Toolbar?

2. Describe how to add a Saved Search to your Favorites:

3. How do you add multiple Saved Searches at the same time to your Favorites?

4. How do you add classifications to Favorites?

5. Classifications cannot be removed from Favorites.
 - a. True.
 - b. False.

8.6 Summary

In this Chapter you learned how to:

1. Add and remove Saved Searches to Favorites
2. Add and remove Classifications to Favorites

You should now be able to add and remove saved searches and classifications to your Favorites.

9. Shortcut Keys{ XE "Shortcut Keys" }

9.1 Objectives

This chapter will list some of the short-cut keys that can be used in TRIM to perform various functions.

Records{ XE "Shortcut Keys:Records" }:

[Ctrl][F]	Find Records
[Ctrl][A]	Tag all records in a search window
[Ctrl][U]	Untag all records in a search window
[Alt][Enter]	Opens properties of a selected record
[Ctrl][M]	Make a TRIM Reference

Menus{ XE "Shortcut Keys:Menus" }:

[Alt][F], x	<u>F</u>ile E<u>x</u>it
[Alt][E]	<u>E</u>dit Menu
[Alt][S], C	<u>S</u>earch <u>C</u>urrent Search

Help{ XE "Shortcut Keys:Help" }:

[Shift][F1]	Invokes the Online Help
F1	Invokes context sensitive help from within a dialogue box

Drop-Down List Box{ XE "Shortcut Keys:Drop-Down List box" }:

Down Arrow	Scrolls down through choices
Up Arrow	Scrolls up through choices

Searches{ XE "Shortcut Keys:Searches" }:

[Ctrl][G]	Open the Saved Searches window
[F4]	Add a saved search or tagged classifications to the Favorites Toolbar
[F7]	Refine a search

[Alt][Left Arrow]	Go back to the previous search window (works after using F7 to refine a search)
[Alt][Right Arrow]	Go forward to the next search window (works after using F7 to refine a search)

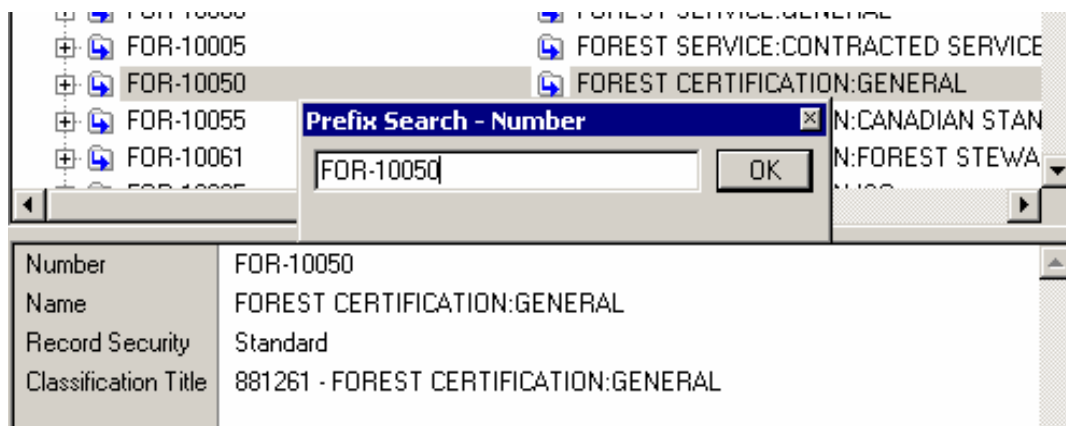
Work Tray{ XE "Shortcut Keys:Remove Classifications from Favorites" }:

[F3]	Add records to the Work Tray
[Alt][F8]	Open the Work Tray window

10. Tips and Tricks{ XE "Tips and Tricks" }

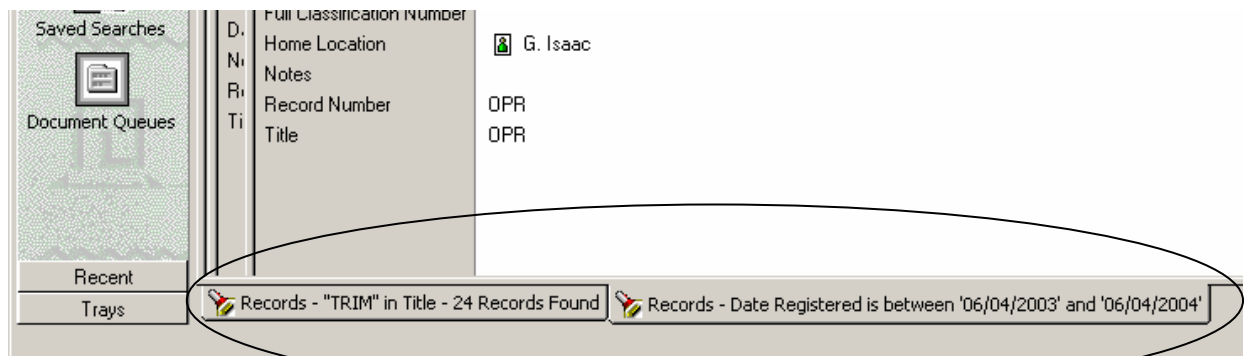
10.1 Prefix Search{ XE "Tips and Tricks:Prefix Search" }

At the classification screen, if you just start typing FOR-XXX (where XXX = a secondary number), a dialogue box will appear with that criteria as the search entry.



10.2 Tab Bar{ XE "Tips and Tricks:Tab Bar" }

Right-click on the Favorites Toolbar and choose Tab Bar to see a description of each window content appear in a tab at the bottom of the screen.



11. Whom Do I Call for Help{ XE "Help" }?

Below is the contact information for TRIM, Records Management and Computer assistance.

11.1 TRIM Help{ XE "Help:TRIM Help" }

Contact the following for assistance with the TRIM application:

Telephone Number:

E-mail Address:

11.2 Records Help{ XE "Help:Records Help" }

Contact the following for assistance with Records Management functions:

Telephone Number:

E-mail Address:

11.3 Computer Help{ XE "Help:Computer Help" }

Contact the following for assistance with your Computer:

Telephone Number:

E-mail Address:

12. Glossary{ XE "Glossary" } of Terms and Acronyms{ XE "Glossary:Acronyms" }

The table below provides a list of definitions for Records Management and TRIM Context terms and records acronyms.

Term	Definition
-A-	
Accession Number	Means a number identifying a group of records to be transferred to off-site records storage facilities or to archival storage facilities. Accession numbers are used to label, transfer, store, retrieve, and dispose of records. British Columbia Archives (BC Archives) issues and tracks all accession numbers. Each box of records within an accession is given a unique box number by adding sequential numbers, always beginning with number one, to the accession number. The full number must appear on the label of each box. For example: Box Number: 91-0123-1 91-0123 = the accession number issued by Records Centre Services -1 = the first consecutive box number in accession 91-0123
Action Tracking	Not used yet.
Active Records	Means records which are required and referred to constantly for current use and which need to be retained and maintained in office space and equipment close to users. Records are considered active if there is more than one reference or retrieval per 30cm (one linear foot) per month.
Administrative Records	Means records common to all offices and which are distinct from operational records. Administrative records support housekeeping functions such as the management of facilities, property, materiel, finances, personnel, and information systems. Administrative records also relate to common management processes, including committees, agreements, contracts, information services, legal opinions, and other similar functions. Although these records are considered administrative, they may have considerable operational impact.
ARCS	Administrative Records Classification System, used throughout the BC government for administrative records
Archive Authority	Our Classification systems ARCS and ORCS.
ARS 011a	Records Transfer Location List.
ARS 118	Records Service Application.
ARS 130b	Client Authority to Apply Schedule.
ARS 517a/b	Client Authority to Apply and Approved Schedule.
ARS 196	60-day Notice of Final Disposition Actions
ARS 462	Box Content File Cover Sheet
ARS 626	Offsite Storage Records Retrieval (Fax)
-B-	

-C-	
Case File	Means a folder or other filing device containing a variety of material relating to a specific action, event, person, place, project, or other subject. Sometimes referred to as a project file or dossier. ORCS and ARCS usually classify case file series under secondary numbers and titles at secondary number -20 and higher, followed by alphabetical or numerical codes.
Classification	Means the result of a process for identifying records or information in accordance with a predesignated filing or security system. That process includes determination of the subject content of a record, selection of the subject category for filing, and assignment of an appropriate subject file number for retrieval purposes.
Consignment Number	Record Services Application number{ XE "Glossary:Application number" }.
Content Start Date	
Content End Date	
CPIAB	Corporate Privacy and Information Branch
CPM	Core Policy Manual.
CRMB	Corporate Records Management Branch.
CY	Calendar Year.
-D-	
D	Day.
Data and Records Administration Section	Means the Ministry of Forests' Office – Data and Records Administration that is overall responsible for the ministry's recorded information program. This office houses the Ministry Records Officer and is responsible for policy development, procedures, training, and processes the ministry's accession paperwork.
DDA	Document Disposal Act (RSBC 1996).
DE	Destruction.
Destroy/Destruction of Records	Means the various methods of destroying valueless inactive records when authorized under the Document Disposal Act (e.g., by shredding, incineration, or pulping). Destruction includes recycling.
Disposal Schedule	In TRIM, a document prescribing treatment for classes of recurring records as agreed upon by the creating office or department and the archives office. Also known as an Archive Authority.
DMIP	Director or Manager of Information and Privacy.
Document	Is a record according to the Interpretation Act RSBC 1996 C.238 - a 'record' includes books, documents , maps, drawings, photographs, letters, vouchers, papers and any other thing on which information is recorded or stored by any means whether graphic, electronic, mechanical or otherwise.
Document Disposal Act (RSBC 1996 C.99)	Means the provincial legislation which grants power to dispose of records upon the written recommendation of the Public Documents Committee and the approval of the Executive Council or Legislative Assembly. The Act governs the final disposition of the records of all offices in or under the ministries, branches and institutions of the Executive Government of the Province. It provides for the establishment and approval of records schedules which describe classes and series of records and their retention and final disposition requirements.
DOR	Directory of Records

-E-	
Electronic Records	Means records consisting of data and information which is inputted, created, manipulated and/or stored on electronic media which show evidence of actions and decisions.
ELF	Eliminate Legal-size Files Program
Executive Records	Means records created and/or accumulated and used by the offices of ministers, deputy ministers, assistant deputy ministers and equivalent positions, including records created by incumbents in their executive capacity. Executive records are government records and include the records of cabinet ministers that are created and/or accumulated and used by a minister (or a minister's office) in developing, implementing and/or administering programs of government. The retention and final disposition of executive records is governed by the Document Disposal Act. Executive records are covered by government-wide special schedule (102906).
-F-	
FAPRO	Financial Administrative Procedures.
FD	Final Disposition.
File	Means: <ul style="list-style-type: none"> • A device in which records are systematically arranged for reference and retrieval (e.g., a folder). • A collection of related documents treated as a unit and arranged in a logical sequence. The most commonly used internal file arrangement is chronological. • The action of arranging documents in a predetermined sequence and location. • Within a machine-readable record, two or more data records of identical layout that is treated as a unit. This unit is larger than a data record, but smaller than a data system, and is sometimes known as a data set.
Final Disposition	Means the action taken with regard to the disposition of inactive records following their appraisal by BC Archives, the written recommendation of the Public Documents Committee and the approval of the Legislative Assembly or Executive Council. Final disposition can involve either: <ul style="list-style-type: none"> • physical destruction of the records; • transfer of the records to the custody of BC Archives for selective or full retention, which may include conversion to another format and destruction of the original records; • the special disposition of the records through sale, grant or other formal acts of alienation from the Crown; or • the return to potential donor or transferring agent of non-government records for which BC Archives does not acquire legal custody.
FO	Organization Code for Forests.
FOIPPA	Freedom of Information and Protection of Privacy Act (RSBC 1996).
FOR	Ministry of Forests.
FP	Forests Practices Board.
FR	Full Retention.
FS 96	Closed Volumes.
FS 143	Transfer of Legal Custody
FS 160	Request for Records Services

FS 1079	Box Contents/Detailed File Sheet
Full Retention (FR)	Means that all records covered by a secondary have archival value. BC Archives preserves in its entirety and in an accessible format the recorded information contained in such records. Under the terms of full retention, the archivist responsible may destroy unnecessary duplicates, publications, waste and scrap materials, ephemera (often published material of short-term value), and other items which are not an integral part of the record series.
FY	Fiscal Year
-G-	
Government Records	<p>Means all recorded information regardless of physical format, which is received, created, deposited, or held by or in any ministry, agency, board, commission, Crown corporation, institution, committee or council reporting or responsible to the Government of British Columbia.</p> <p>The Interpretation Act (RSBC 1996, c. 238, s. 29) defines "record" as follows:</p> <p>"record" includes books, documents, maps, drawings, photographs, letters, vouchers, papers and any other thing on which information is recorded or stored by any means whether graphic, electronic, mechanical or otherwise.</p> <p>Government records include machine-readable records, data stored in information systems, film, audio and audiovisual tapes, etc.</p> <p>Government records include the records of cabinet ministers that are created and/or accumulated and used by a minister (or a minister's office) in developing, implementing and/or administering programs of government.</p> <p>Government records do not include legislative records (records created and/or accumulated and used by an individual or an office in the administration of the Legislative Assembly of British Columbia or by a Member of the Legislative Assembly)</p> <p>The retention and final disposition of most government records is governed by the Document Disposal Act.</p>
-H-	
-I-	
IM	Information Management.
Inactive Records	Means records for which the active and semi-active retention periods have lapsed. Inactive records are ready for final disposition.
IPA	Information and Privacy Analyst.
IPC	Information and Privacy Commissioner.
ISA	Information Sharing Agreement.
ISO	Information System Overview.
-J-	
-K-	
KwikSelect	In TRIM, a field where data may be entered or where you may invoke, through use of the KwikSelect button, TRIM's advanced search functions. The icon looks like an open file folder.
-L-	

Legal Custody	Means the legal ownership of government records. It includes the responsibility for ensuring the guardianship of government records in accordance with predetermined rules costs. (GMOP)
Location – Current	In TRIM, Assignee, a person – applies to physical records.
Location – Home	In TRIM, the physical storage location (the Current Legal Custodian) – applies to physical records.
Location – Owner	In TRIM, the organizational unit.
-M-	
M	Month.
Metadata	Data about data (e.g. in TRIM the title, subject, author and size of a file constitute metadata about the file).
Ministry Records Officer (MRO)	Means a director/manager designated by an ministry to be responsible for the overall administration and control of the agency's records, and to represent the agency on the Ministry Records Officers' Council..
MRO	Ministry Records Officer.
MROC	Ministry Records Officers' Council.
-N-	
NA	Not Applicable.
NIL	No semi-active period.
Noise Words	In TRIM, a list of words that will not be indexed if they are used in Record Titles, Notes, Thesaurus Terms, Classification Plans etc. Common noise words include: about, and, of, that, the, etc.
Non-OPR	Not the Office of Primary Responsibility.
Non-Office of Primary Responsibility (Non-OPR)	Means any office or branch which is NOT the main custodian of the master record or record copy of a document or information for its ministry or agency.
-O-	
OPR	Office of Primary Responsibility.
Office of Primary Responsibility (OPR)	Means the office of a ministry or agency which has primary responsibility for a category of records or holds the master copy of any record series. The OPR maintains the official master copy of the records in order to satisfy operational, financial, legal, audit and other requirements. All other copies are considered duplicates and have a shorter retention period.
Operational Records	Means records which relate to the operations and services provided by a ministry or agency in carrying out the functions for which it is responsible according to statute, mandate, or policy. Operational records are distinct from administrative records and are unique to each government organization.
Operational Records Classification System (ORCS)	Means the government-wide standard for classification, filing, automated retrieval, vital records and freedom of information and protection of privacy designations, and disposition scheduling of operational records. ORCS is a block numeric records classification system, reflecting function and subject. BC Archives establishes standards for the development of ORCS for all operational records of the Government of British Columbia. Each ORCS is tailored to fit the specific operational records of a unit of government.
ORCS	Operational Records Classification ?System.
Original Record	Means a record which exists in the physical state or states in which it

	was first created, or the earliest generation of the record in BC Archives' custody.
-P-	
PA	Provincial Archives/Archivist.
Part	Synonym of "Volume" – a section of a record. It retains the characteristics of the record, but may have a new suffix.
PDC	Public Documents Committee.
Personal Information	Means information about an identifiable individual that is kept by government in any format. This includes: <ul style="list-style-type: none"> • the individual's name, address or telephone number; • the individual's race, national or ethnic origin, colour, religious or political beliefs or associations; • the individual's age, sex, sexual orientation, marital status or family status; • any identifying number, symbol or other particular assigned to the individual; • the individual's fingerprints, blood type or inheritable characteristics; • information about the individual's health care history (including a physical or mental disability); • information about the individual's educational, financial, criminal or employment history; • anyone else's opinions about the individual; or • the individual's personal views or opinions (except if they are about someone else).
Personal Information Bank	Means a collection of personal information that is organized or retrievable by the name of an individual or by an identifying number, symbol or other particular assigned to an individual.
Physical Custody	Means the physical guardianship of government records. It includes activities such as establishing accession level control, implementing proper storage techniques and environments, providing handling instructions, and managing physical access to the records.
PIA	Privacy Impact Assessment.
PIB	Personal Information Bank.
PID	Personal Information Directory.
Policy and Procedures Files	Means files which contain records relating to the plans, decisions, and actions embracing the general goals and acceptable procedures of a government organization. They include correspondence and other records relating to draft and approved policies on a specific subject including actual policy statements, interpretations of policy, development and discussion of policy, and inquiries regarding policy.
Primary Block	Means a logical group of related subjects or functions which are assigned sequential numbers. Each block contains primary subjects (i.e., primary numbers and titles) subordinate to the major function of the block.
Primary Number and Title	Means the basic building block of ARCS and ORCS. A primary relates to a function or subject. It is a heading within which specific records and record types may be classified and arranged.
PUR	Public Use Record
-Q-	
QRMS (Quest Records Management)	Means an application used in the ministry to create files, track boxes, generate reports and to check records schedules.

System)	
-R-	
RA	Records Analyst.
RC	Records Custodian.
RCS	Records Centre Services (part of CRMB).
Record	<p>In Gov't, "recorded information, in any form...created or received and maintained by an organization on the transaction of business ...and kept as evidence of such activity." (<i>Australian Standard AS 4390-1996, part 1, clause 4.21</i>) In the BC government, the record is the indivisible unit for records management processes.</p> <p>Information, regardless of medium, detailing business transactions. A catch-all term for anything that might be classified and filed, including files, documents, etc.</p>
Record Number	
Record Type	<p>In TRIM, a means of categorizing files.</p> <p>Similar in concept to a 'template' or some type of record.</p>
Records Management	In Gov't, Records management is the exercise of physical and intellectual control over records to ensure their integrity in support of government accountabilities and actions. Ministries establish physical control by ensuring records are identified, documented, located, retrieved, and protected from loss, physical damage or inappropriate access. Ministries establish intellectual control over their records by ensuring they are classified, retained and disposed of (destroyed or transferred to the legal custody of the BC Archives) in accordance with their values (that is, in accordance with retention and disposition schedules). Retaining records required for operational, administrative, fiscal, audit and legal purposes (while applying the final disposition to the records whose primary values have ceased) reduces on-site and off-site storage expenditures.
Records Management Centre	Means the office in Victoria that is responsible for managing and maintaining the records of all Victoria offices with certain exceptions.
Records Schedule	<p>Means "a prescribed timetable that (a) describes a document's lifespan from the date on which it was created to the date of its final disposition, including the periods of its active and dormant [i.e., semi-active] stages either as waste or as a document of legal or historical value to be permanently preserved, and (b) provides instructions as to the manner and time of the disposition of a document under this Act" as defined in the Document Disposal Act (RSBC 1996, c. 99, s. 1).</p> <p>Specifically, a records schedule is a list which describes records and indicates:</p> <ul style="list-style-type: none"> • the length of time each record shall be retained as an active record before transfer to semi-active off-site records storage; and • the length of time each record shall be retained in semi-active storage prior to final disposition; and • the final disposition of each type of record.
Records Services Application (Ars 118):	Means the form used by client ministries or agencies to request records management services and to apply for authorization for immediate or future final disposition of records or for amendment of an existing records schedule. This form is available on the Shana application. All offices are now required to use this electronic form.
Records Services Application Number{	Means the number preprinted in the top right-hand corner of the Records Service Application (ARS 118) and which is used for

XE "Glossary:Application Number" }	application tracking purposes. If the application results in a schedule approval, this number will become the authorized schedule number.
Records Transfer Location List (ARS 011a.b)	Means the form used by client ministries or agencies to transfer records, regardless of media, to off-site records storage facilities. The purposes of the form are: <ul style="list-style-type: none"> • to list the contents of boxes being transferred to off-site storage; • to expedite retrieval from storage facilities; • to serve as a finding and location aid for staff of the ministry or agency; and • to aid the staff of BC Archives in the analysis, appraisal, and selection of records. A Records Transfer Location List (ARS 011a/b) must be used for transfer of semi-active or inactive records to off-site records storage facilities. If necessary, a continuation sheet, ARS 011b, is used. This form is available on the Shana application. All offices are now required to use this electronic form.
Reference Copies	Means copies of records, usually made by copying the duplication masters, which will prevent frequent handling of the original records and/or the archival masters.
Retention and Disposition Schedule	In Gov't, the length of time a file is to be retained and the type of final disposition that is applied to it. In an integrated classification and scheduling system (<i>ARCS/ORCS</i>), retention and disposition schedules are linked to secondary classification numbers.
Retention Period	In Gov't, the length of time a file is retained, and is determined by the retention and disposition schedule. The file may be disposed only after the active and semi-active retention periods that apply to it have elapsed.
Retrieval code	A user defined field set up in TRIM to store information.
Revision	In TRIM, modified copies of an Electronic Document, an iteration of an existing document. You may create multiple revisions of an Electronic Document and each of these will be attached to the same record in TRIM. New Revisions are achieved by Checking Out a document, modifying it in its associated application and Checking it back In as a New Revision. In Govt, synonymous with 'version control'.
RIMM	Recorded Information Management Manual
RMC	Records Management Centre (HQ offices only).
RMU	Records Management Unit.
RO	Records Officer.
Rollover	
RSBC	Revised Statutes of British Columbia.
-S-	
Schedule	In TRIM, the equivalent of a set of retention periods and a final disposition within a government schedule authority.
Schedule Authority	"Records Classification and Retention Authority." ARCS is a schedule authority, as is each ORCS. Within the schedule authority there are different sets of retentions/dispositions (schedules, in TRIM terms).
Scheduling Management	In Gov't, defined as managing the retention and disposition of files in accordance with their scheduling requirements.
Scope Note	Means a statement of the functions, uses and content of the records

	<p>which are to be classified within a primary records classification. A scope note indicates the administrative or operational function to which the records relate and should give a general statement about the record types (memos, forms, reports, etc.) and media (photographs, video recordings, etc.) covered.</p> <p>A scope note may also contain information about the method(s) of records arrangement or organization, finding aids and indexes, records usage, information sources, records which are specifically excluded from the primary classification and filed elsewhere, and sources in which the information is reported in summary form. Freedom of information and privacy legislation considerations may be included.</p>
Secondary Number and Title	Means a subdivision of a primary number and title. The two-digit secondary number is added to the primary number to form a complete file number. Secondary numbers and titles describe specific types of records and link them to the records schedule.
Security Caveat	Security Caveats are a privacy control (for example: all records that have the caveat PROTECTED PERSONAL may only be viewed by those who have been accorded the PROTECTED PERSONAL caveat).
Security Classification	Means a category assigned to information (and records) according to a security system in order to clearly show the appropriate level of protection against access or disclosure (e.g., open, restricted, or confidential).
Security Level	Security Levels distinguish records by a successive classification (for example: all records that are classified HIGH are “higher” in restriction compared to those classified as MEDIUM).
Selective Retention	Means that some of the records covered by a secondary have archival value. The archivist responsible selectively retains portions of the record series by means of a percentage, statistical, or random sample, or by other recognized archival selection criteria.
Semi-Active Records	Means records which are referred to infrequently and not required currently for constant use. Semi-active records still retain primary values, but should be removed from expensive office space to a lower cost off-site records storage facility until all primary values have expired. Records are considered semi-active if there is less than one reference or retrieval per 30cm (one linear foot) per month.
SHANA	Means the on-line application developed by the Ministry of Forests and now available government-wide. This system provides all of the forms necessary to complete records transactions and staff are required to use this system when processing accession paperwork.
SO	Superseded or Obsolete
SO Date	
SR	Selective Retention
Subject Files	<p>Means files containing records which relate to specific subjects or functions and which are arranged according to general informational content. The purpose of subject files is to bring together records and information on the same topic in order to facilitate information retrieval.</p> <p>ORCS and ARCS usually classify subject files under secondary numbers and titles between -02 and -19.</p>
Supplementaries	<p>Supplementaries identify material related to a particular file but cannot be physically located within the parts of a file.</p> <p>For example:</p>

	<ul style="list-style-type: none"> • Alternate media types (oversize maps, videotapes etc.) <p>Enclosure file (FOI request files = main file + supps; supps = photocopies of requested material)</p>
-T-	
TRIM	Total Records Information Management, an electronic records and document management system from Tower Software based in Australia.
Transitory Records	Means records of temporary usefulness which are not an integral part of an administrative or operational record series, which are not regularly filed within a standard records classification system, and which are only required for a limited period of time for the completion of an action or the preparation of an ongoing record. Transitory records are not required to meet statutory obligations or to sustain administrative or operational functions.
-U-	
Vital Records	Means the records of government which contain information essential to: <ul style="list-style-type: none"> • conduct of emergency operations during and immediately following a disaster; • resumption/continuation of government services or operations; • re-establishment of the legal, financial and functional responsibilities of government; and • re-establishment of the rights and obligations of individuals, corporate bodies and other governments with respect to the Government of British Columbia.
VR	Vital Record
-V-	
Volume	<p>See "Part".</p> <p>In Gov't, a volume is defined as a component of a file. A volume contains records, and may exist in any media or format (e.g. file folder, electronic folder, microfilm roll, map drawer, and so on). Volumes are often referred to as folders, enclosures, directories, supplements, or sub-files. All these terms refer to the components of a file, and are covered by "volume" in these <i>Requirements</i>.</p> <p>Volume in Gov't terms = Part in TRIM</p> <p>In TRIM, A volume is simply a new folder created when an older folder either gets too big or is otherwise closed (e.g. at year end).</p>
-W-	
W	Week
Working Materials	Means rough notes, calculations, preliminary drafts, and research notes which are assembled or created in the preparation or analysis of other records, such as correspondence, memoranda, reports, and statistical tabulations. When the final documents have been produced and incorporated in an administrative or Operational Records Classification System, working materials become transitory records. Working materials relating to statutes, audits, or records specified in a records schedule are not transitory records.
-X-	
-Y-	
Y	Year

-Z-	

13. Index

Disposition Management	
Accessing Records in the Work Tray	7-15
Accession Number	7-10
Adding Records to a Box	7-11
Adding Records to the Work Tray	7-14
Consignment [Application] Number	7-10
Creating a Box	7-8
Culling	7-1
Disposition Search for Records	7-7
Off-Site Transfers	7-14
Print Box Contents List	7-13
Records Work Tray	7-14
Removing Records from the Work Tray	7-16
Transfer to Archives for SR and FR	7-17
Exercises	
Creating Records	3-14
Creating Supplements	3-18
Culling	7-18
Favorites	11-2
Printing Labels	4-5
Record Maintenance	6-26
Record Requests	5-9
Relating Records	3-20
Remove Classifications from Favorites	11-5
Saving Searches	10-3
Searches	9-14
Submit Record Requests	5-4
Favorites	11-1
Add Classifications to Favorites	11-3
Adding a Search to Favorites	11-1
Remove Classifications from Favorites	11-5
Glossary	15-1
Acronyms	15-1
Application number	15-2
Application Number	15-7
Help	14-1
Computer Help	14-1
Records Help	14-1
TRIM Help	14-1
Labels	
ColorBar	4-10
Label Design	4-10
Print ColorBar Labels	4-9
Printing a Single Label	4-1
Printing Labels	4-1
Printing Labels with Barcodes	4-7
Printing Multiple Labels	4-5
Skip Labels	4-7
Locations	8-1
Assignee	8-5
Create an Internal Person Location	8-9
Home Location	8-5
Location Usage Permissions	8-7
Owner Location	8-5
Record Update Permissions	8-7
Understanding Locations	8-1
User Roles	8-5

Record Entry Form	
Classifications	3-7
Record Maintenance	6-1
Close a File	6-22
Create a New Part	6-1
CY and FY Rollover Files	6-19
Maintenance of SO Files	6-18
Making a TRIM Reference	6-12
Manage Missing Records	6-4
Mark a Record as Missing	6-4, 6-5
Record Holds	6-22
Search for a Missing Record	6-5
Transfer Records to an External Location	6-7
Record Requests	5-1
Find Records that are Due Back	5-11
Litigation Requests	5-9
Process a File Folder Request	5-4
Removing a Request	5-13
Submit Record Requests	5-1
Records	3-1
Adding Records to the Work Tray	3-1
Copy Record	3-15
Create a Supplement Record	3-17
Creating a Record	3-4
Entering Search Values	3-2
Locations Tab	3-11
Notes Tab	3-10
Record Entry Form Tabs and Fields	3-6
Record Numbering	3-17
Relate Records	3-20
Related Records Tab	3-13
Searches	9-1
Accessing a Saved Search	10-2
Advanced Searching	9-10
Count	9-9
Other Advanced Features	9-12
Other Search Functions	9-12
Quick Find	9-10
Refining a Search	9-9
Saving	10-1
Search Filters	9-2
Search Methods	9-1
Search Values	9-2
Sorting a Search	9-3
Shortcut Keys	12-1
Drop-Down List box	12-1
Help	12-1
Menus	12-1
Records	12-1
Remove Classifications from Favorites	12-2
Searches	12-2
Sorting	
Ascending Order	2-9
Descending Order	2-9
Sort Tab	9-4
Tips and Tricks	13-1
Drag and Drop	13-1
Prefix Search	13-1
RMC Toolbar	13-3
Set Assignee	13-4
Tab Bar	13-1
TRIM	
Calendar button	2-12

Cancel button	2-12
Changing the Dataset in TRIM	2-2
Checkboxes	2-12
Combination Field.....	2-12
Customizing the View Pane	2-21
Dialogue Box	2-10
Drop-down lists.....	2-12
Edit Menu	2-6
File Menu	2-5
Help button	2-12
Help Menu	2-8
KwikSelect field.....	2-12
Launching TRIM Context™	2-1
List Pane	2-9, 2-16
Modifying the Format of the display	2-19
Modifying the Information Displayed.....	2-16
OK button	2-12
Option buttons.....	2-12
Parts of a TRIM Dialogue Window	2-8
Search Menu	2-6
Title Bar	2-9
Tools Menu	2-7
User Configuration Options	2-12
View Pane.....	2-10
What is TRIM Context.....	2-1
Window Menu	2-7
TRIM Trays	
Adding Records to the Work Tray	2-23, 2-24
Records Work Tray	2-23

14. Answers to Section Questions

Check your answers here to the questions that appear in each of the chapters.

14.1 Section 2 – Introduction - Taking the TRIM Tour

1. **TRIM Context™ is:**
d. A fully integrated Electronic Document and Records Management Solution program.
2. **Only the System Administrator can customize TRIM desktop settings:**
b. False.
3. **Columns cannot be sorted in the List Pane window:**
b. False.
4. **A shortcut menu can be used to change the View Pane options:**
a. True.
5. **What is the difference between a Drop-down List and a KwikSelect List?**
The dropdown list contains the most recently used items from which a selection is made. Data may be entered into a KwikSelect field or TRIM's advanced selection facilities may be invoked.
6. **Explain the steps to customize the View Pane Window:**
Right-click anywhere in the View Pane Window and choose Customize. Fields can then be added from the Available Fields window to the Active Fields window.
7. **The Drop-down list in a Dialogue Box displays:**
c. Up to the last 25 most recent selections.
8. **The View Pane displays Hidden and Active Columns:**
b. False.

14.2 Section 3 – Creating Records

1. **A record in TRIM is:**
c. Evidence of a business transaction.
2. **Searching on Title Word also searches for the Retrieval Code:**
b. False
3. **Why is it *not* necessary to populate the fields on the Locations Tab when creating a record?**
The fields in this tab are automatically populated by TRIM.
4. **What prefix is required at the beginning of the Free Text Title of a supplement record?**
SUP.
5. **How do you perform a Retrieval Code Search?**
Use the User-Defined Field Search Method and choose Retrieval Code.

6. **What type of record would have a relationship of Alternatively Within?**
A supplement record.

14.3 Section 4 - Printing Labels

1. **You can only print one label at a time in TRIM?**
b. False
2. **How do you print barcodes onto labels?**
Search for the appropriate records, tag them, then send them to Print Report and choose the Record Label (INCL BARCODE) layout from the list of reports. (*TRIM will print both internal and foreign barcodes.*)
3. **Any type of user in TRIM can design Label type reports:**
b. False
4. **Only one type of label can be printed in TRIM?**
b. False
5. **How do you print multiple labels in TRIM?**
Search for the records and tag them then send to Print Report and choose the appropriate label type.
6. **Printing out a few labels means the rest of the sheet is wasted.**
b. False
7. **What feature in TRIM is used to print labels?**
Print Report

14.4 Section 5 - Record Requests

1. **How is a record request submitted in TRIM?**
A TRIM user will place a request for a specific record or group of records to the RMC staff.
2. **A record can only be requested once:**
b. False
3. **How are record requests processed?**
RMC staff will search for requests and then change the assignee on those records to the person who requested the records.
4. **Explain how a record request is removed once a record is returned.**
Open the properties of a record that has been returned and remove the request from the Record Requests tab. Right-click on the request and choose

Remove Request.

5. **What type of user can request files in TRIM?**
All users.

14.5 Section 6 - Record Maintenance

1. **What is the TRIM term for Volume?**
Part.
2. **What is the purpose of a TRIM Reference?**
To create a pointer or shortcut to records registered in TRIM, similar to a link to a web-site.
3. **How do you mark a record as missing?**
Search for the record in TRIM, right-click and choose Locations from the short-cut menu and then check the radio button next to 'Mark Record as Missing'.
4. **Briefly describe when you would use a TRIM Reference:**
To point another TRIM user or list of TRIM users to a record or group of records in TRIM rather than e-mailing the records and possibly clogging up inboxes and networks.
5. **Why is it necessary to provide TRIM with the Closed/SO dates on SO files that are still open from the previous year?**
So that the retention triggers in TRIM will be activated.
6. **Only an Information Worker can place records on hold:**
b. False
7. **Name the different ways to close a file in TRIM:**
Manually close a file
Create a new part and TRIM automatically closes the old part.
8. **How do you know if a record has been placed on hold?**
Format the columns in the List Pane to include the column **Is in one or more holds** and position it as the first column in the list. A red and white icon will appear to the left of the record to indicate that a record has been placed on hold.

14.6 Section 7 - Disposition Management

1. **What type of search method in TRIM should be performed to find records where the disposition is changing from Active to Semi-Active?**
A Pending Search.
2. **List four of the available CULL Saved Searches that can be used when culling records.**
 - a. CULL - APP ARCS OFFSITE FR
 - b. CULL - DRAFT ARCS OFFSITE DE
 - c. CULL - APP ORCS OFFSITE SR
 - d. CULL - DRAFT ONSITE DE
3. **Which saved search is used to identify active approved ORCS records that have been in offsite storage for a period of time, dated year-to-date and that are eligible for eventual destruction?**
CULL - APP ORCS OFFSITE DE.
4. **What type of record is created when moving files to offsite storage?**
A Box.
5. **What are the steps required to transfer records to the Archives for SR and FR schedules?**
 - a. Search for the records to be transferred.
 - b. Tag all the Records
 - c. Change the Home and Owner Locations to BC Archives
 - d. Notify the RMC staff to change the Disposition to the appropriate status.
6. **Briefly describe the steps required to add records to a box:**
Search for the records and tag them. Set the container to the appropriate box. Make sure you check the 'Enclose the Record Now' checkbox before clicking OK. Print box contents list.
7. **What is the purpose of the Records Work Tray?**
To hold records that are frequently accessed by a user.
8. **What TRIM function is used to print the Contents of the Consignment Container?**
Print Report.

14.7 Section 8 - Locations

1. **In your own words, what is the purpose of Locations in TRIM?**
Locations are used to record location changes/movements, track certain

administrative functions and maintain the integrity of the organization's record holdings as well as record Workflow.

2. **An End User does not have permission to add and maintain Internal Locations:**
 - a. True
3. **The Locations List is found under the Search Menu:**
 - b. False
4. **Match the correct description to the appropriate Location Icon:**

Location Icon	Description
	Staff (Employee) Location (Green Icon)
	Contacts (Red Icon)
	External Organizations (Red Icon)
	Internal Organizations (Green Icon)
	Groups (Green Icon)
	All Locations (Red & Green Icon)
	All Internal Locations (Green Icon)
	All External Locations (Red Icon)

5. **Briefly list the steps to create an Internal Person Location.**
Click the **Tools**|**Internal Locations** from the Menu. Right-click on the List of Locations and choose **New Person** from the short-cut menu. Complete the required fields in the different tab screens and click OK to submit.

14.8 Section 9 – Searches

1. **List some of the Search Methods available in TRIM:**
Title Word, Any Word, Date Created, Date Registered, Document Content, Classification Number, Record Number, and Creator.
2. **It is possible to filter searches in TRIM to narrow the search:**
 - a. True.
3. **What is the purpose of the Quick Find function?**
Only one field can be searched and it has some predefined search criteria that can be selected.

4. **All search methods are available in the Quick Find function:**
 - b. False.
5. **TRIM Context™ permits combining search methods:**
 - a. True.
6. **Explain what is meant by a Boolean search?**

The operators AND and OR can be used together in a search.
7. **What search method is used to perform an Assignee search?**

Locations
8. **What parameters can be used when combining search methods?**

AND, OR, NOT.
9. **What is a Prefix Search?**

A type of filter that permits searching through a list such as Locations for a specific name.

14.9 Section 10 - Saved Searches

1. **Can a search be saved in TRIM?**
 - a. Yes
2. **What is a meta-variable?**

A time period that is not date-specific, such as today or tomorrow.
3. **How is a saved search accessed in TRIM?**

Press [Ctrl][G] or choose **Search|Saved Searches** from the Menu.
4. **Briefly describe how to save a search in TRIM:**

Perform a search in TRIM. Click the **Search|Current Search>Save the Search** from the Menu. Provide a name and complete the information in the Saved Search Wizard.
5. **Can a saved search be removed from the list of saved searches?**
 - a. Yes
6. **What type of saved search could be used to identify calendar year files that are still open from the previous year?**

ROLLOVER - CY FILES
7. **List some of the meta-variables that can be used in a search:**

Today, tomorrow, next week, next month, next year, etc.

14.10 Section 11 – What are Favorites?

1. **What is the purpose of the Favorites Toolbar?**
Quick access to commonly used functions such as favorite searches.
2. **Describe how to add a Saved Search to your Favorites:**
Select a Saved Search through the **Search Menu** and press [F4] or choose **Send to Favorites**.
3. **How do you add multiple Saved Searches at the same time to your Favorites?**
Tag the saved searches and select press [F4] or right-click and choose **Send to Favorites**.
4. **How do you add classifications to Favorites?**
Search for and tag the classifications to be added to Favorites and press [F4] or right-click and choose **Send to Favorites**.

