The '*Search, Tag and Do*'

TRIM Training Handout

For

Ministry of Forests' Information Workers

SP4 Upgrade Version 0.4

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EDS Victoria

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Manual Conventions

The pages that follow describe how information in this manual is presented. The manual has been organized into the following chapters; each dealing with a specific topic and also includes 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 demonstrates how to Search for and Create Physical Records.
- Chapter 4 covers filing electronic documents using the TopDrawer component of TRIM.
- Chapter 5 covers the TRIM Desktop component of TRIM.
- Chapter 6 covers how to file e-mail messages and attachments in TRIM from Outlook.
- Chapter 7 deals with how to use the Reports function to Print Labels.
- Chapter 8 explains how Record Requests are handled in TRIM Context™.
- Chapter 9 covers Record Maintenance including how to create a New Part to a file.
- Chapter 10 covers Disposition Management including culling records and how to transfer records to Onsite and Offsite Storage Facilities.
- Chapter 11 explains how to create and modify External Locations.
- Chapter 12 demonstrates how to search for records using a core group of the various Search Methods available.
- Chapter 13 demonstrates how to save frequently used Searches.
- Chapter 14 deals with the Favorites shortcut bar and how to add saved searches and classifications to Favorites.
- Chapter 15 lists some useful Shortcut Keys to know.
- Chapter 16 describes some Troubleshooting Tips for topics covered in chapters 3 - 12.
- Chapter 17 lists whom to call for help.
- Chapter 18 provides a Glossary of Terms.
- Chapter 19 provides an Index.
- Chapter 20 (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.

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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**

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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

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1. Course Overview

This course presents the basic features of TRIM that a typical Information Worker needs to perform day-to-day records management functions. These include:

- Creating new physical and electronic folders
- Processing requests
- Filing electronic documents and e-mail messages
- Sending files onsite and off-site
- Destruction of records

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™. This will be the Records Custodians in District Offices and in Victoria, staff of the Records Management Centre.

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™.

Note that this course covers the management of physical records only.

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.

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2. Introduction - A Tour of TRIM

2.1 Objectives

In this Chapter you will learn:

1. What is TRIM Context™?
2. How to launch the program.
3. The different Menu Options.
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™?

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™

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.

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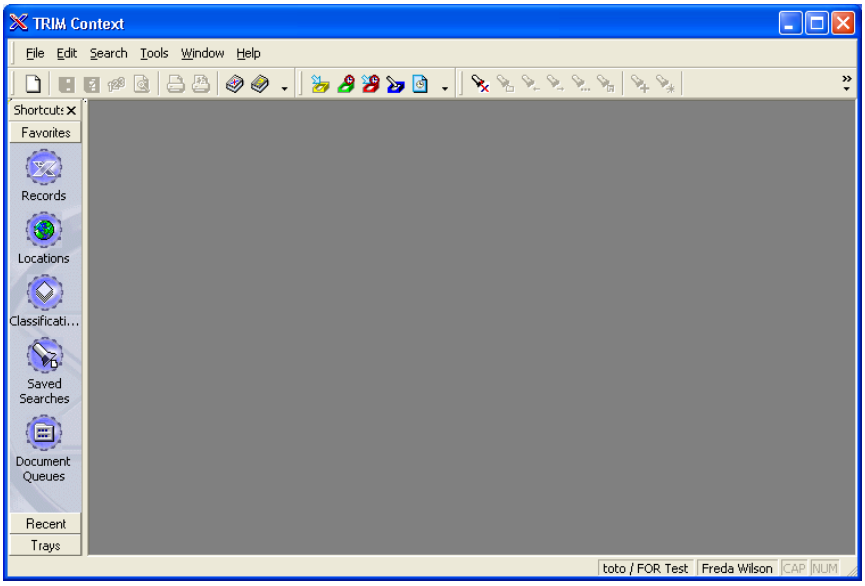

Basically when you work in TRIM Context™ you will be searching for records, tagging records and then executing the specific function that you want to do with those records. For example, you may want to print a specific kind of report so you would begin by searching for certain records, tagging them and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

There are three other TRIM icons that are related to the filing of electronic records. These will be covered later in this course. We will address the filing of physical records first.

2.4 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 FOR Prod on **slipper.idir.bcgov**.

Use **FOR Test** as a place for experimenting or trying out new procedures.

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

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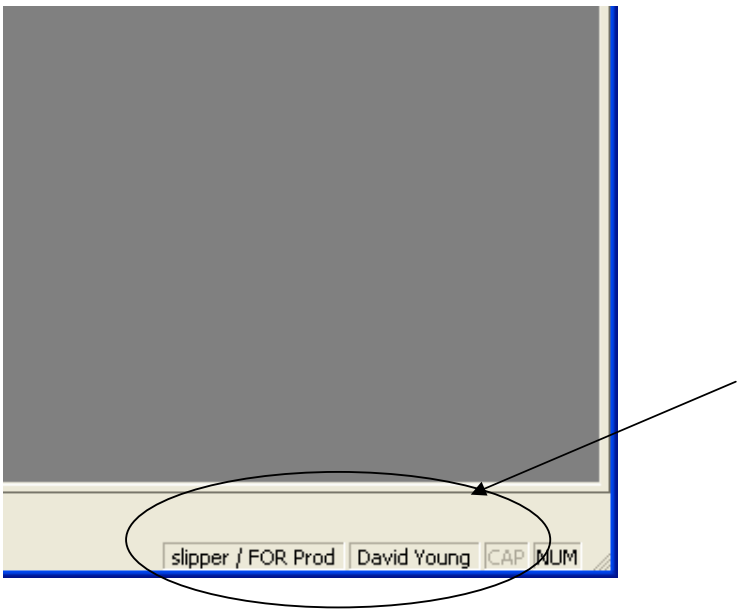
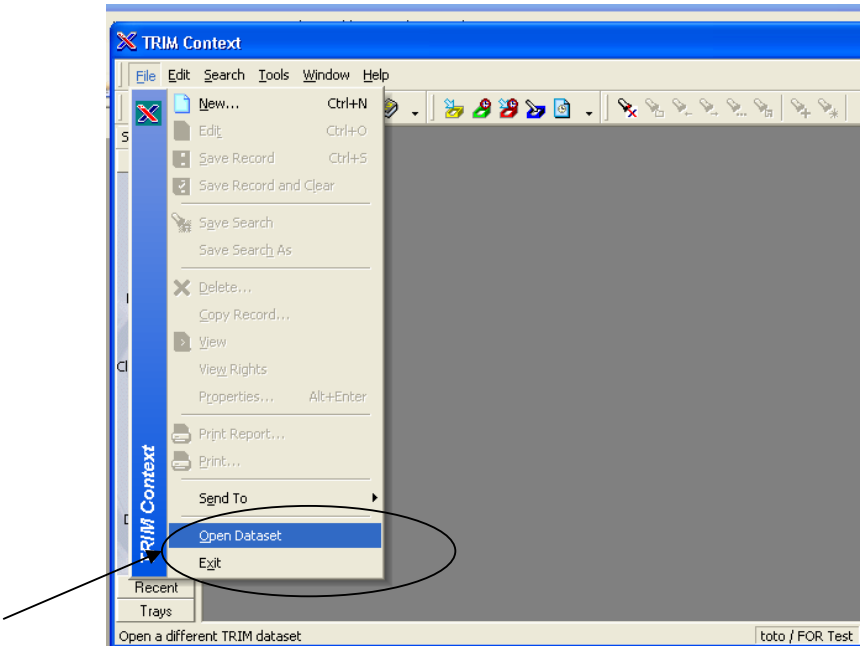


The basic steps to change the dataset are:

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



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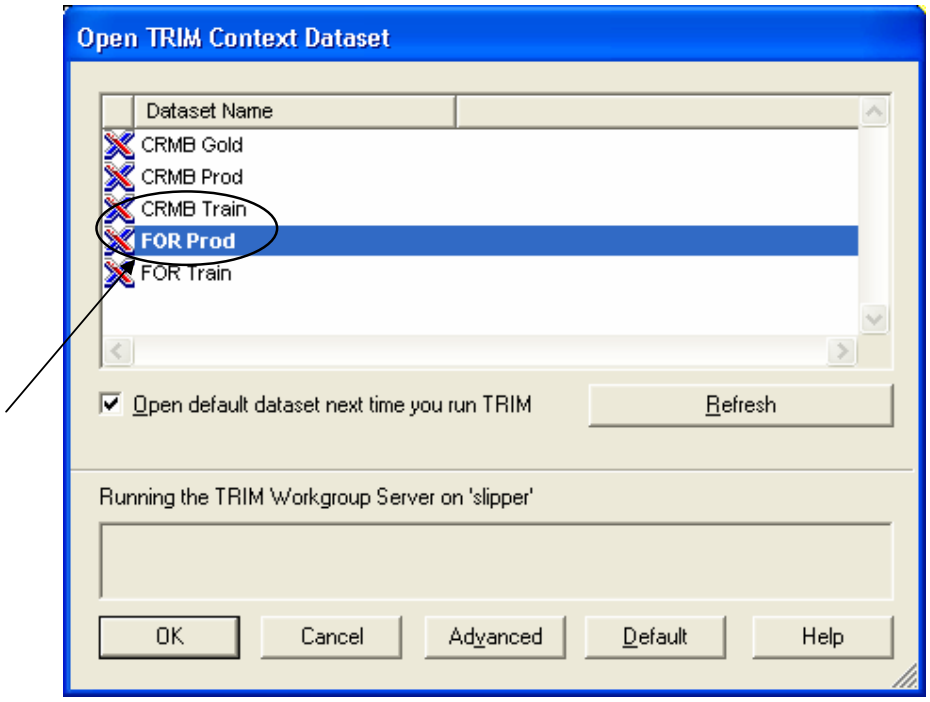
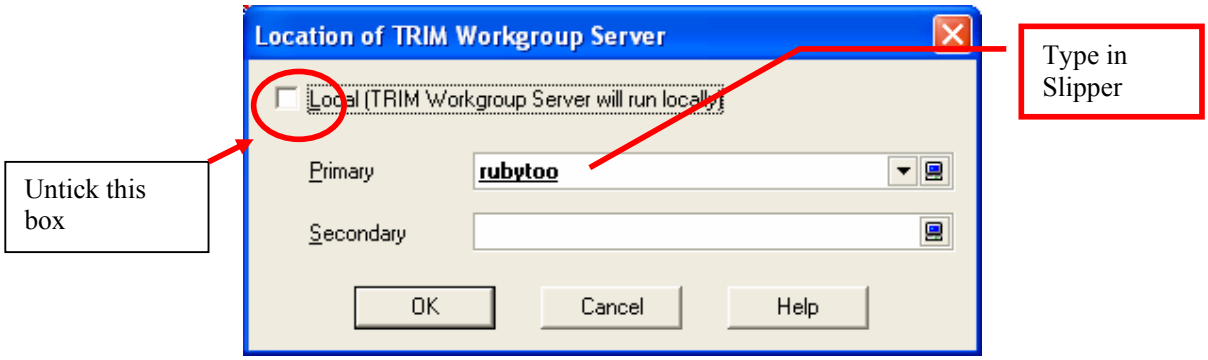
B. Select the **Dataset** from the list displayed.



C. Click *OK* to proceed.

If no dataset list appears in this box, click on the "Advanced" button



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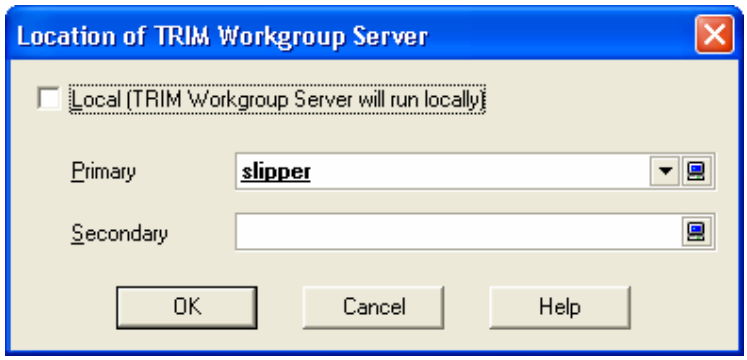
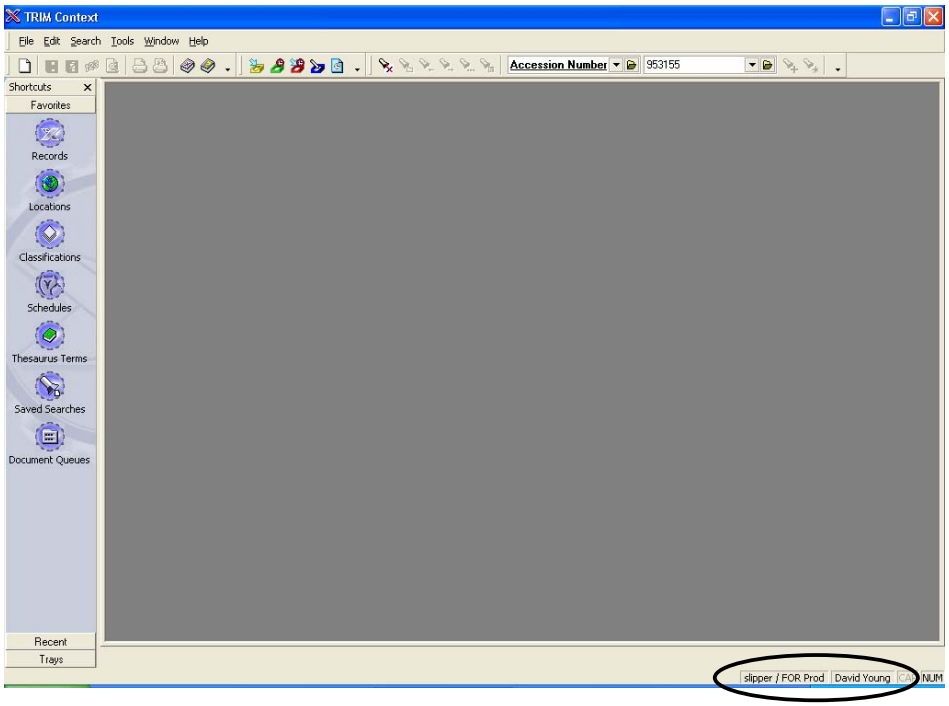


Then do steps B and C

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.



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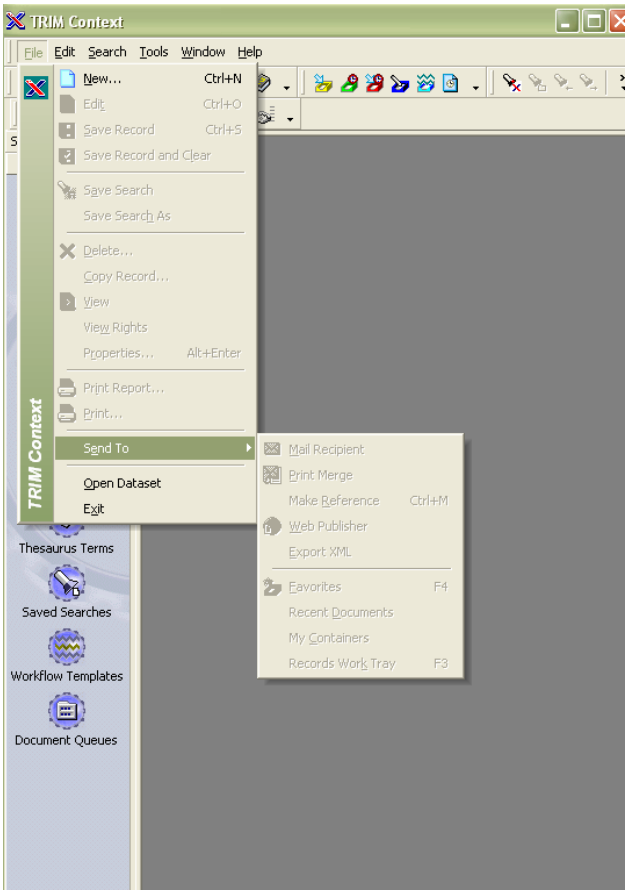
The TRIM Menu System

The 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.



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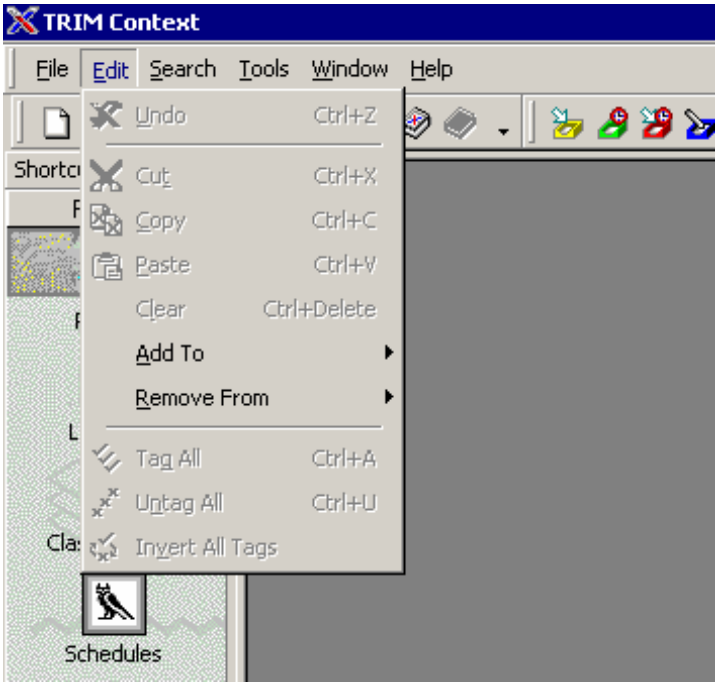
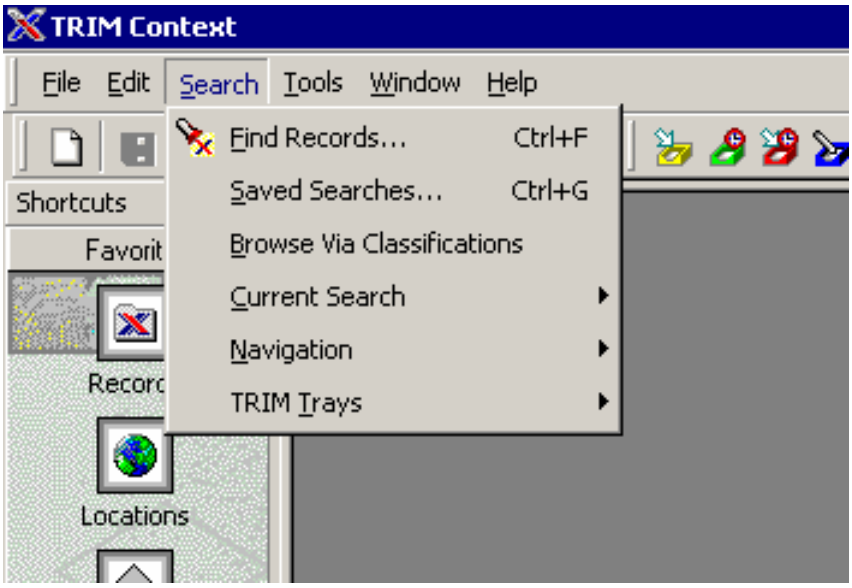
The Edit Menu

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



The Search Menu

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



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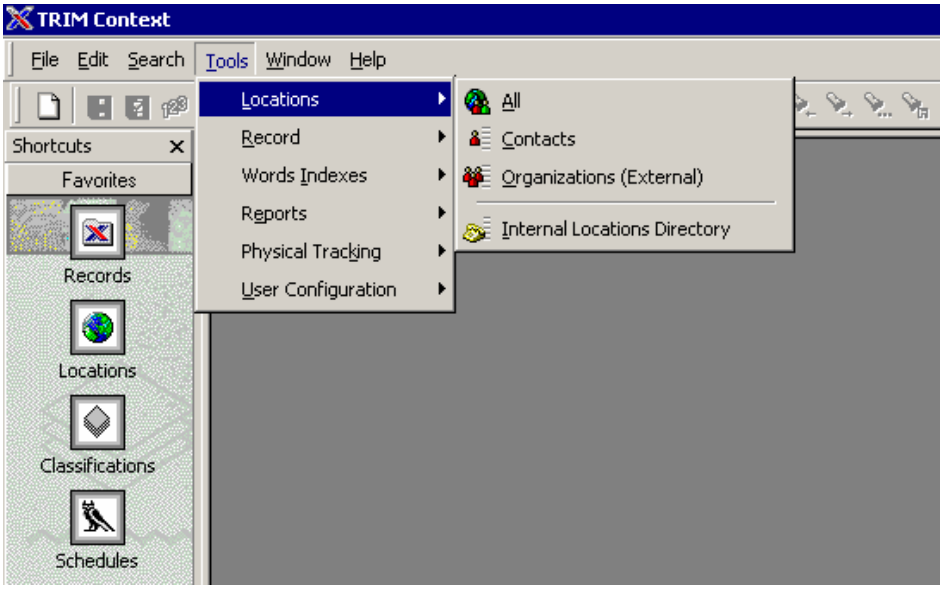
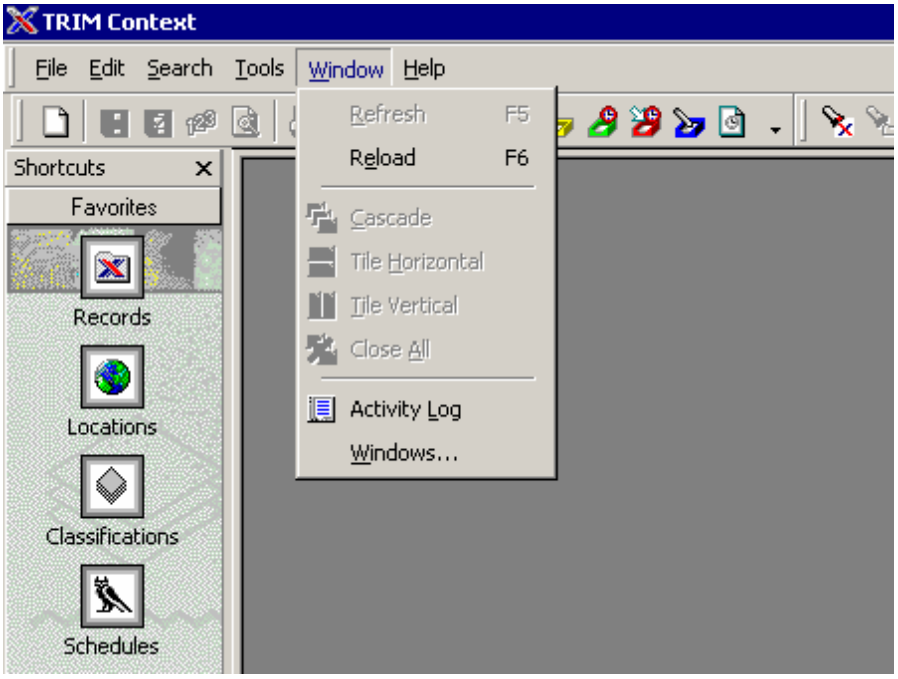
The Tools Menu

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

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.



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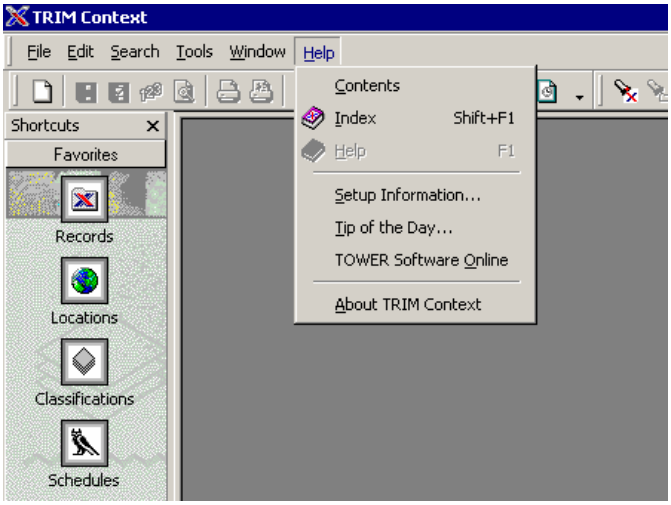
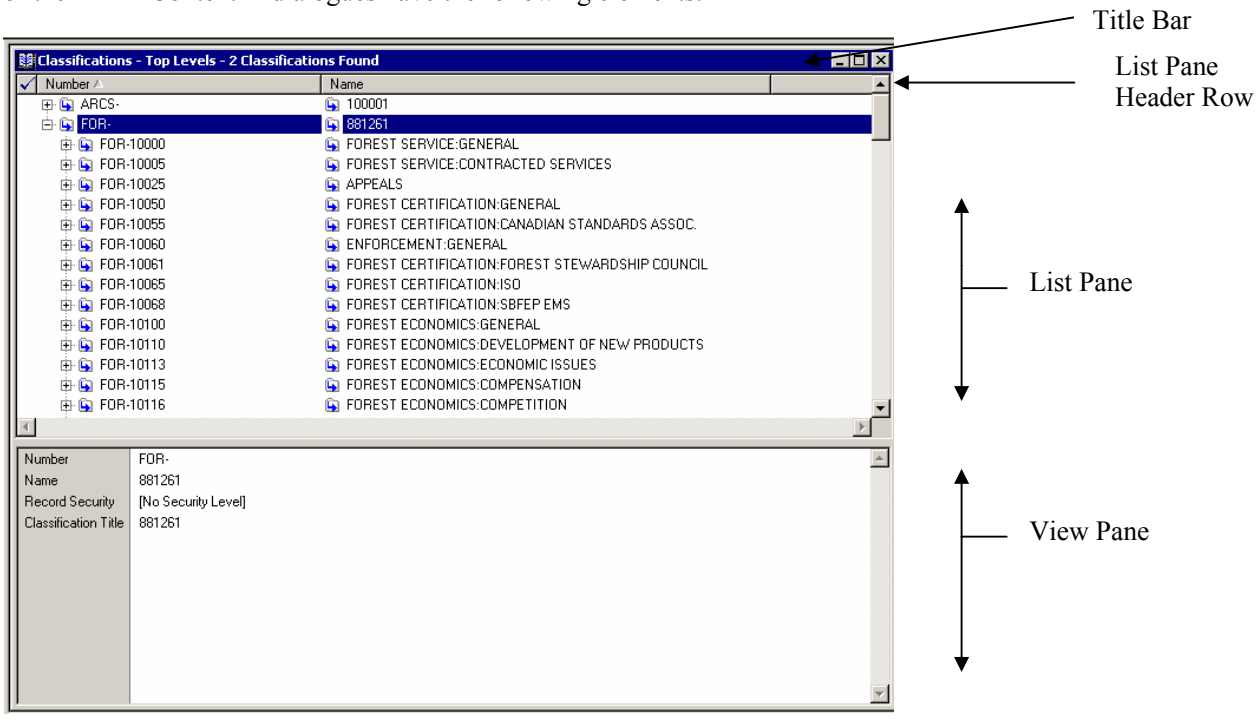
The Help Menu

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



2.5 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:



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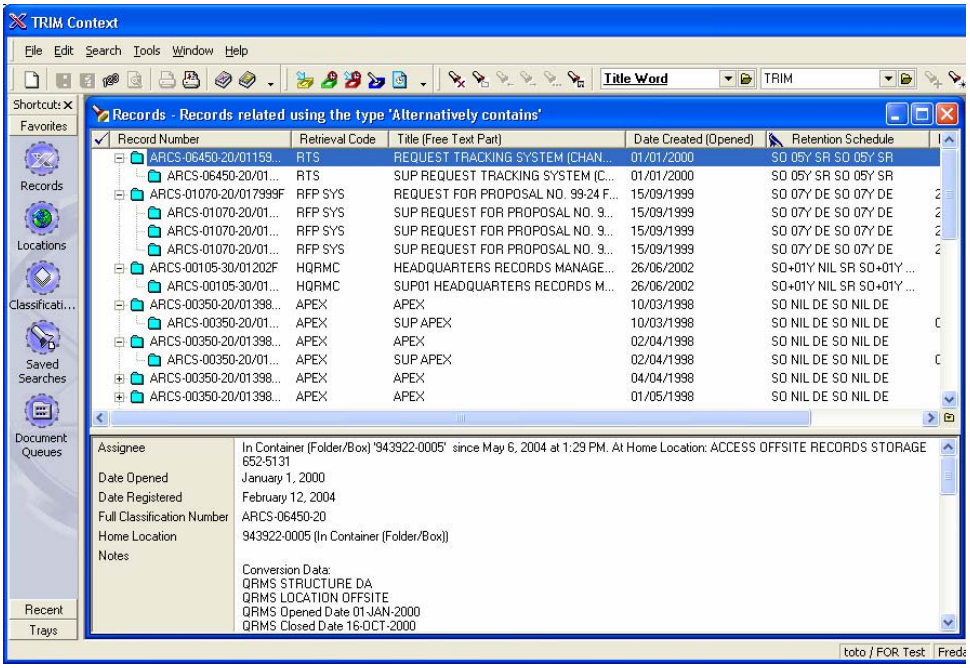
2.6 How Things Look in TRIM Context™

2.6.1 Title Bar

The Title Bar will indicate which window or dialogue box 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.

2.6.2 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.



2.6.2.1 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.

Sorted Ascending Order

Sorted Descending Order

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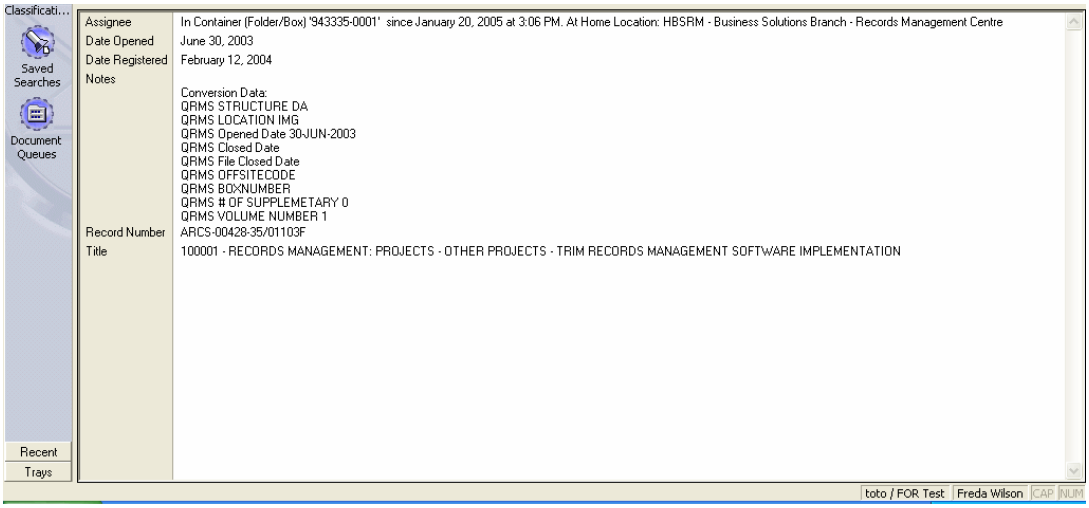
2.6.3 View Pane

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.



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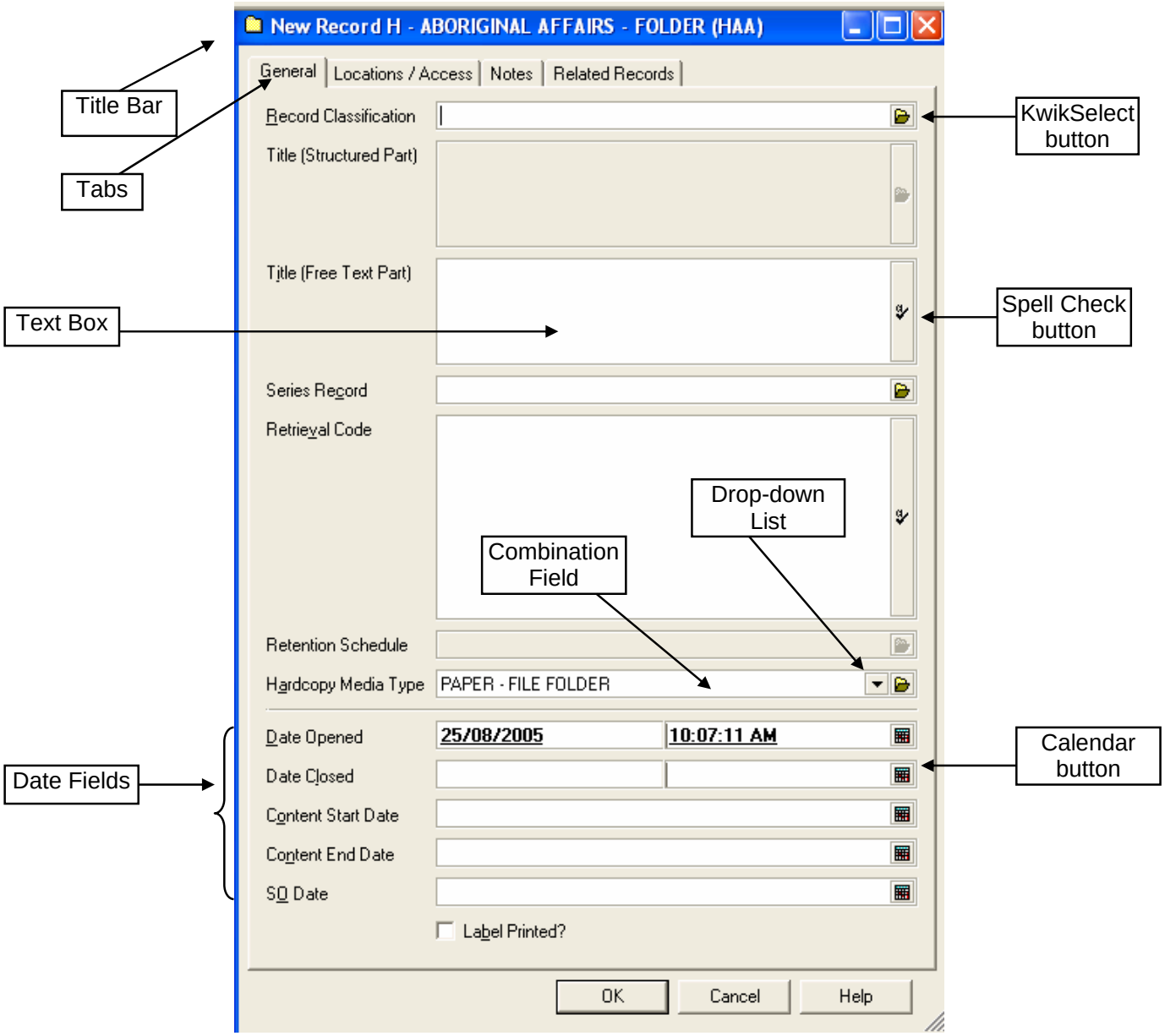
2.6.4 Typical TRIM Dialogue Box

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.

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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 such as 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:	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:	Lists the most recently used selections up to a maximum of 20 for the current field. Click the ▼arrow to view the choices.
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:	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	Are used to state whether the field is *true* or *false*.
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:	Is used to execute a command using the data currently entered in the dialogue box.
Cancel button:	Closes the dialogue box without executing the command.
Help button:	Provides context sensitive help on the current function.

2.7 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.

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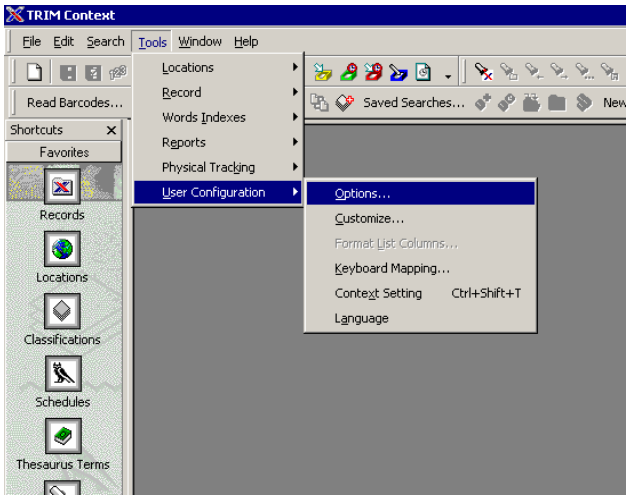
2.8 User Configuration

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

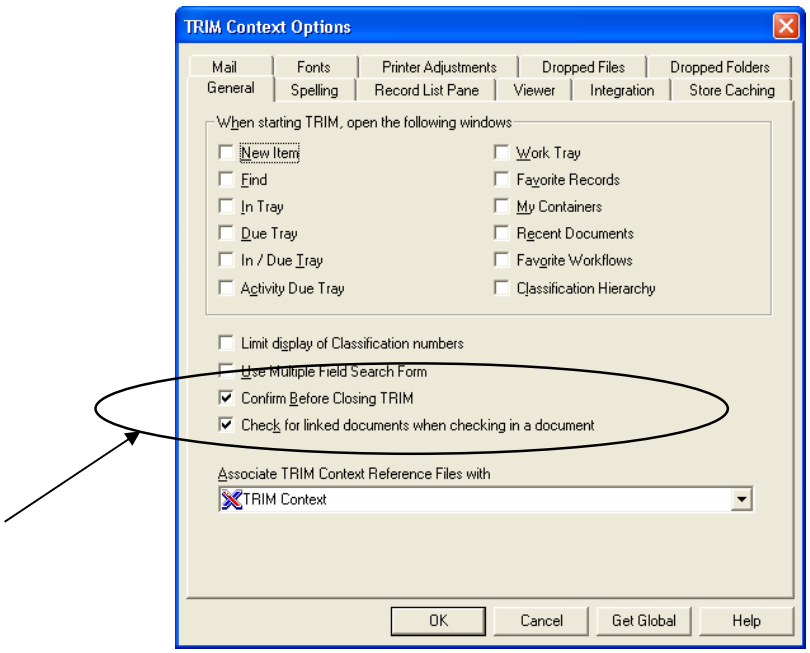
User Configuration Options

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

A. Select **Tools|User Configuration> Options** from the Menu in TRIM Context.



B. Ensure only the two items shown below are checked on the General Tab.



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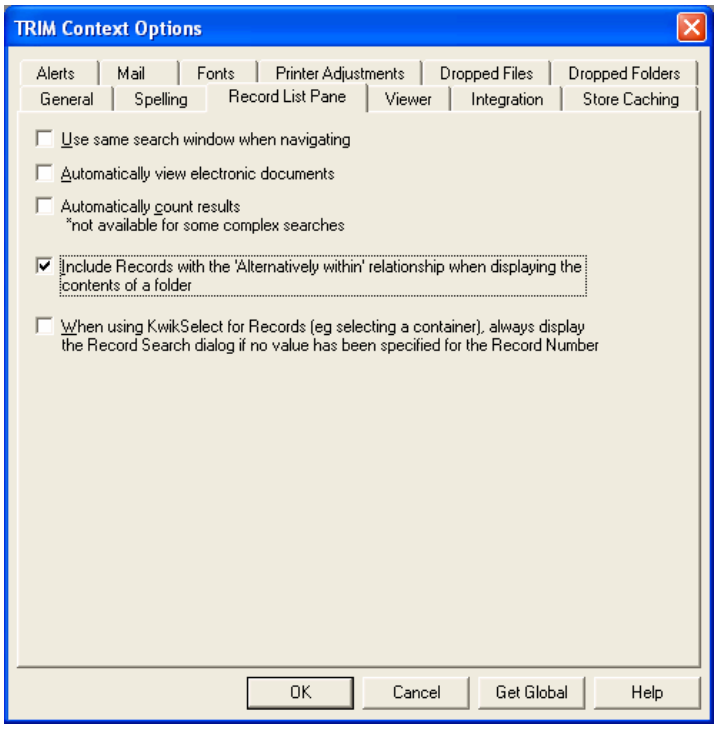
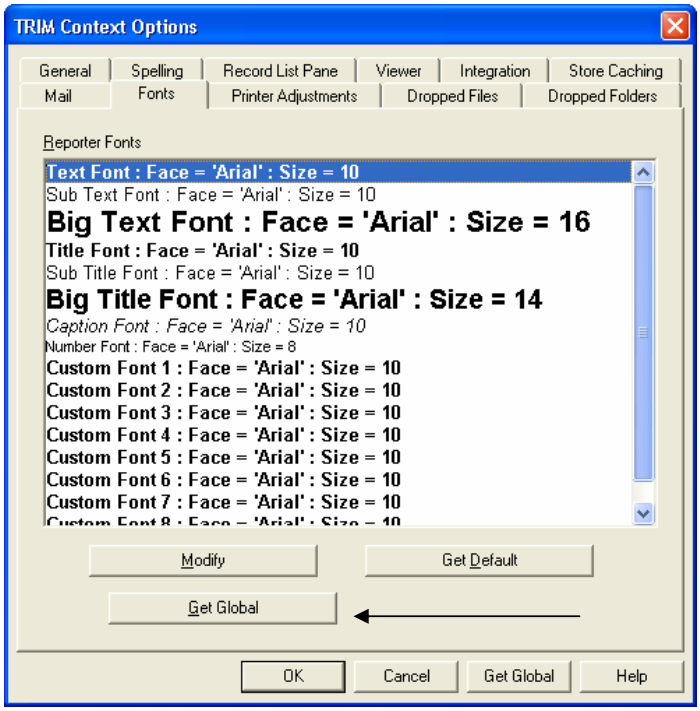
C. Click the **Record List Pane** Tab and ensure the '**Include Records with the 'Alternatively within' relationship when displaying the contents of a folder'** is checked.



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



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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.

2.9 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.

2.9.1 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.

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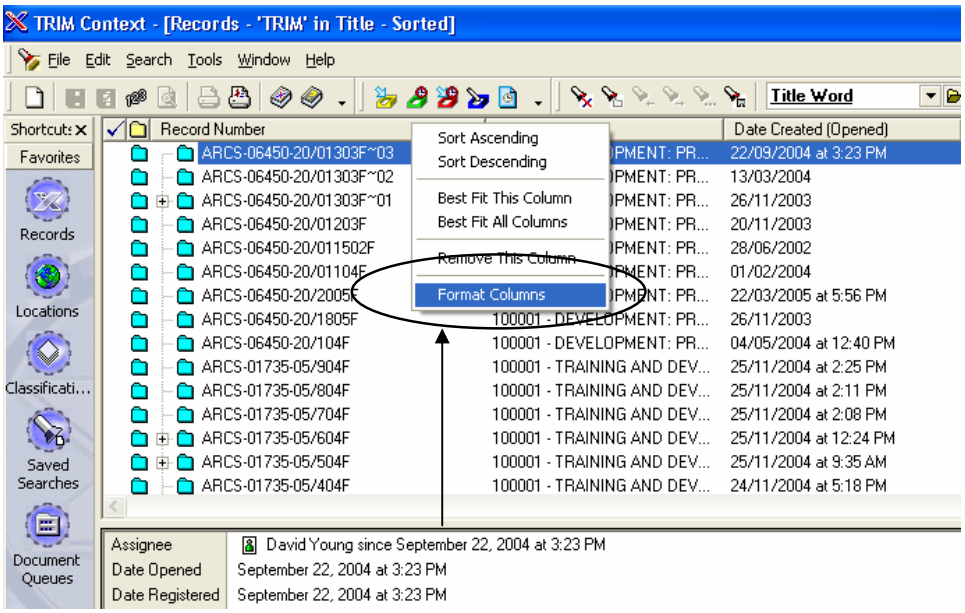
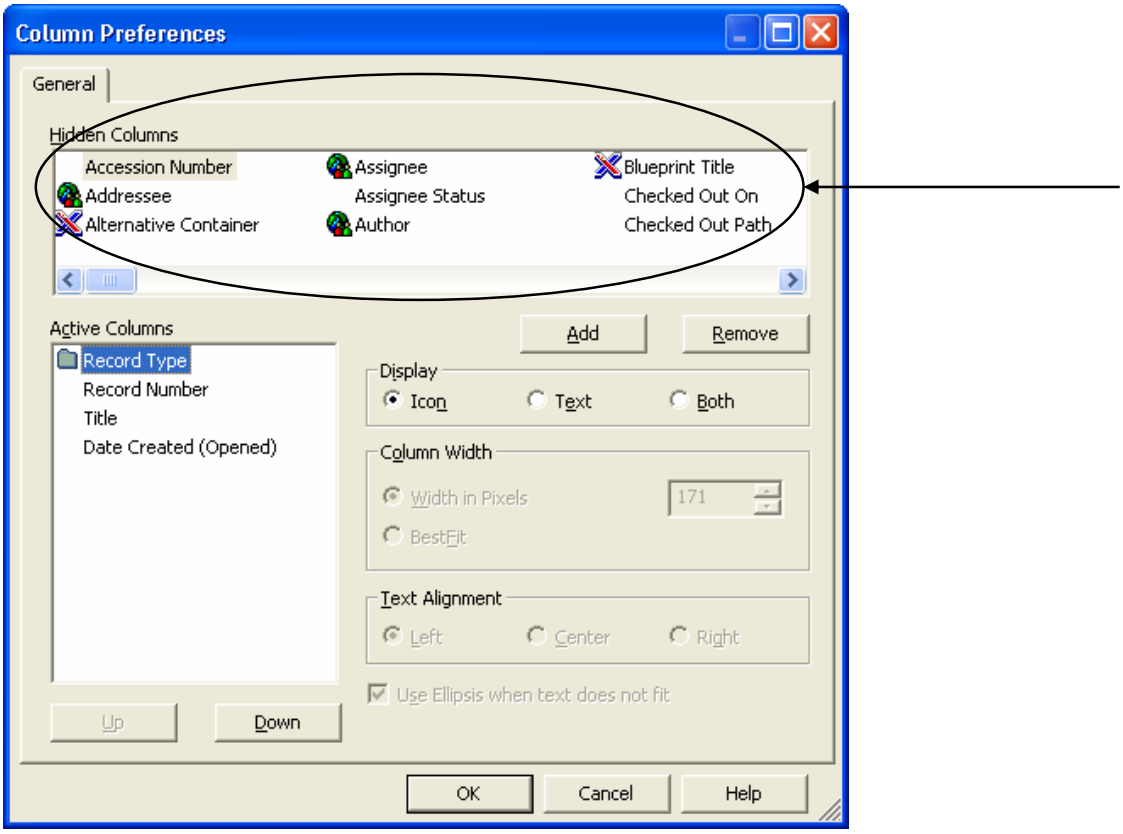


The following dialogue box will appear:



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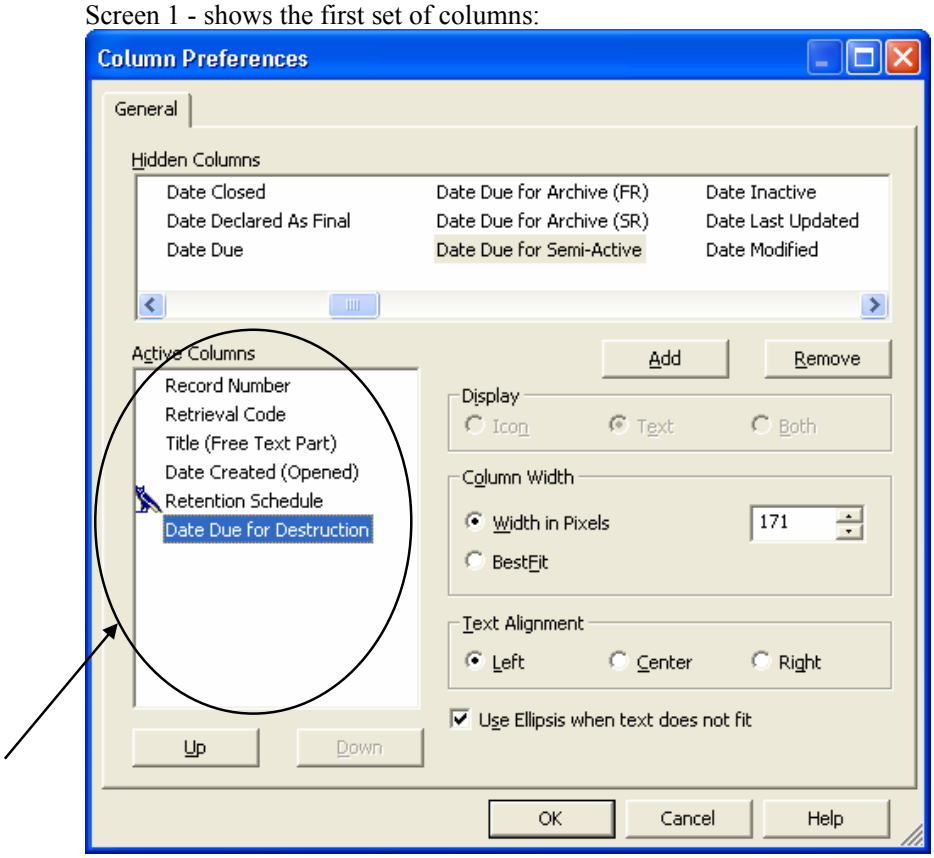
Hidden Columns:	Lists all information that may be displayed within the List Pane. Each dialogue will have different columns that may be displayed. Use the scroll bar to see all available columns.
Active Columns:	This area displays all the Columns that are currently being displayed in the List Pane in 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:



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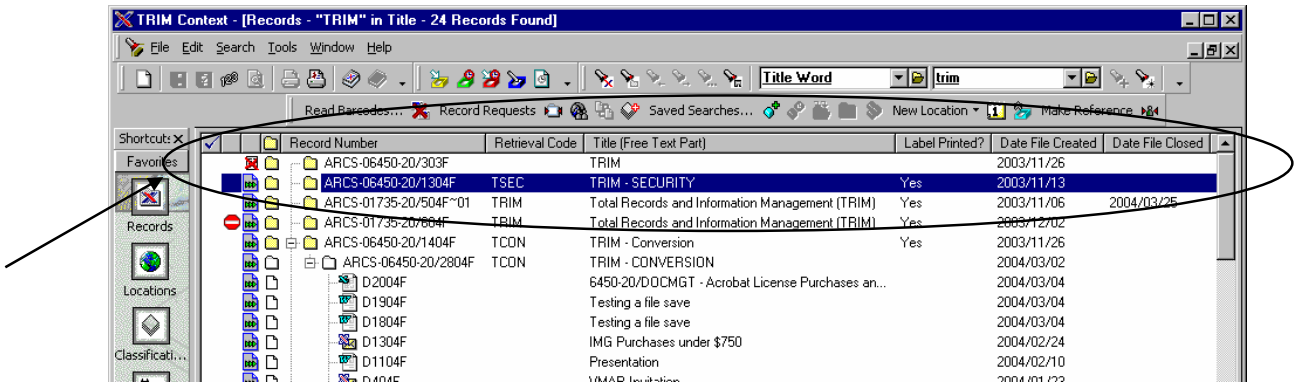
The attributes of these columns should be as follows:

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:



2.9.2 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.

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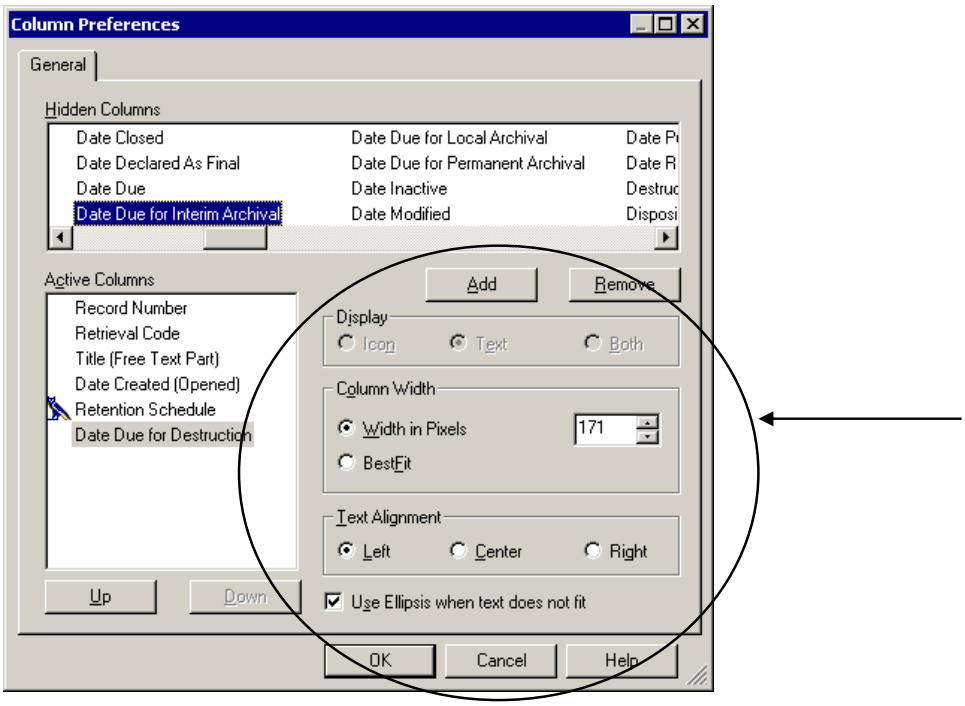
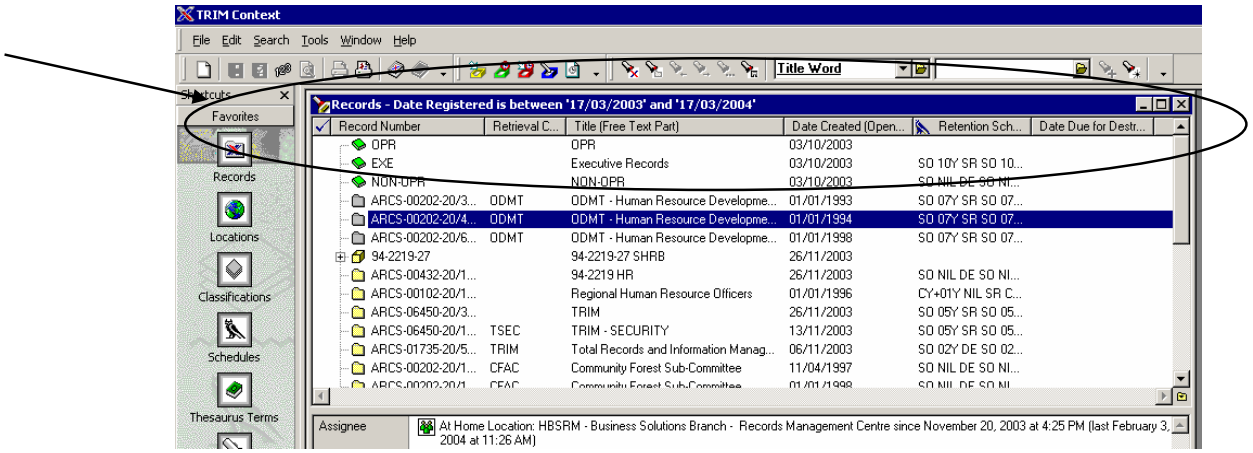
Column Width:	The Column width allows you to manually set the size of the column in pixels or you may select the best-fit option. Although this option is available, it is far easier to modify the size of the columns with the mouse.
Text Alignment:	The Text Alignment determines the position of the text 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:



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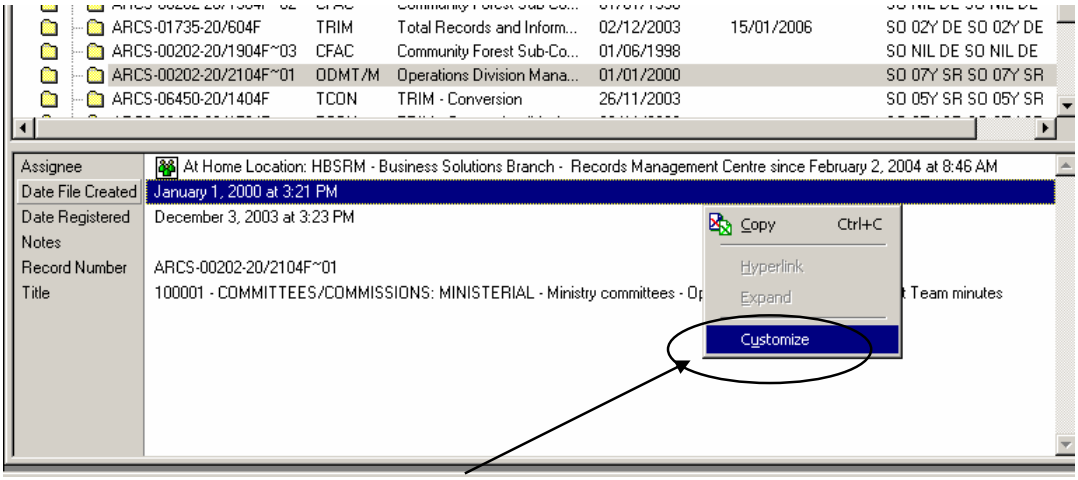
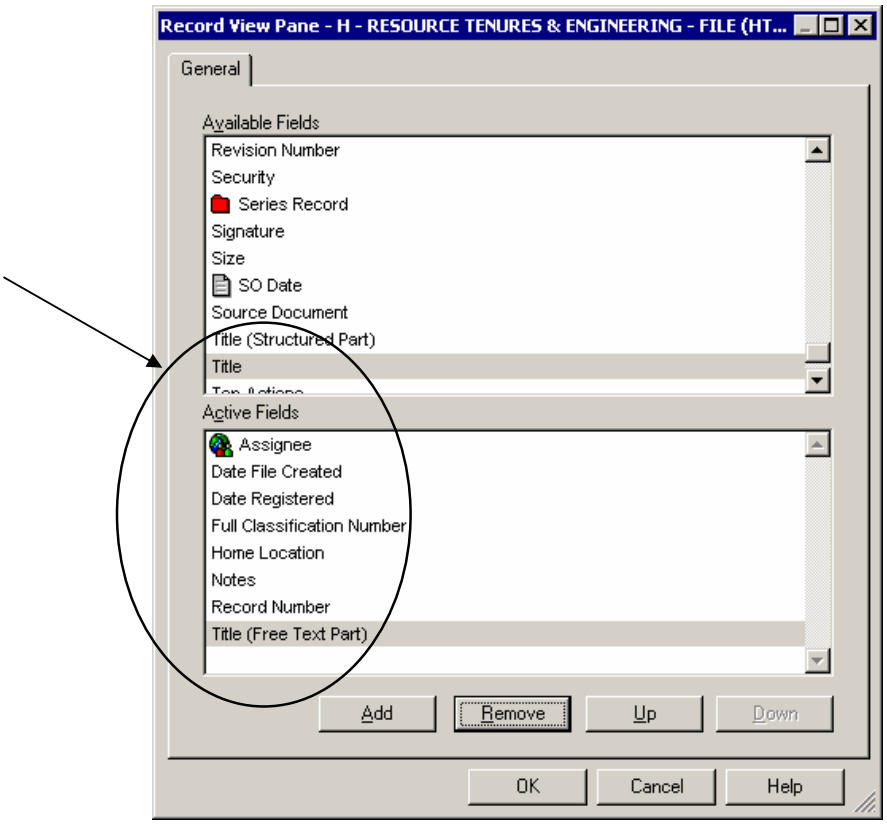
2.10 The View Pane

2.10.1 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:



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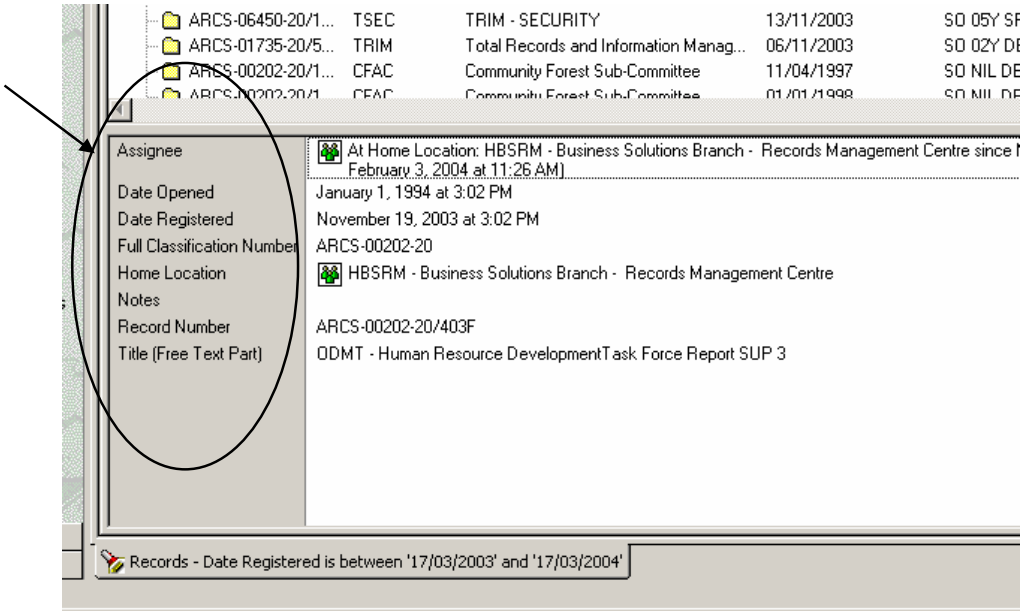
Select one of the options from the Available Fields and either double-click or click **Add** to move the field into the Active List. The Up and Down buttons will change the order in which the field is displayed in the Active Fields List. To remove an unwanted field from the Active List, double-click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

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

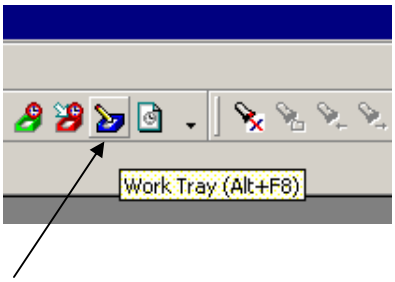


Note: *In TRIM you must customize the view pane for each different Record Type, e.g. Box, File, Document. The above screenprints are for displaying the List and View pane for a File Record Type. As you become comfortable using TRIM, you may customize the List and View pane fields to your personal preferences.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

2.11 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.



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2.12 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.

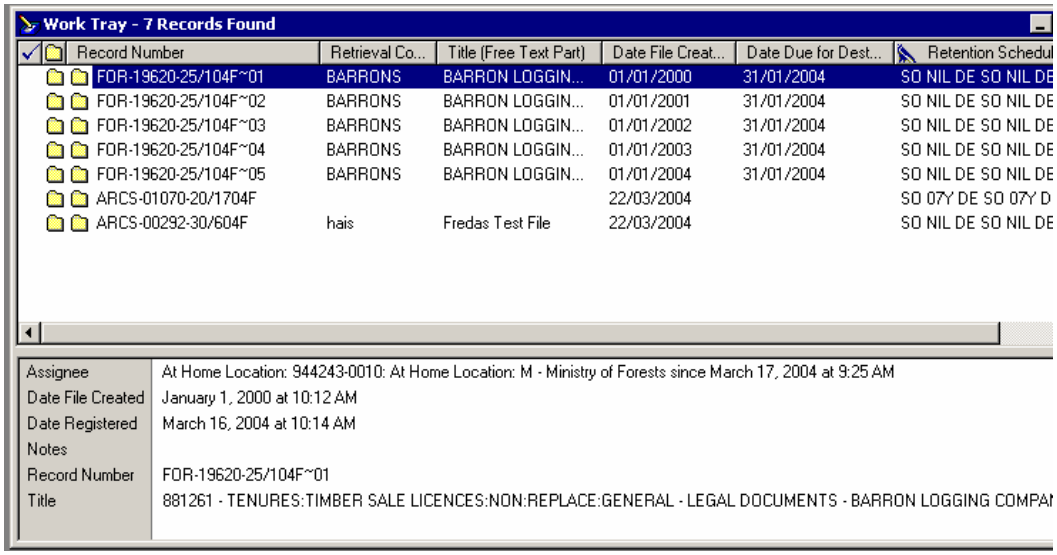
D. Click *OK* to confirm.

2.13 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.



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2.14 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. 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 20 most recent selections.

8. The View Pane displays Hidden and Active Columns:
    a. True
    b. False

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2.15 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 know how to modify the display of information.

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3. Records

Many types of records can be created, modified and searched for in TRIM Context™. This chapter deals with physical records only. You will learn about managing electronic records in in chapters 4 and 5 of this handout.

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.

3.2 Searching for Records

Before learning how to create and modify a record, the following information will first teach you how to do a basic search for a record in the TRIM repository (see Chapter 12 for a more detailed explanation of searching for records).

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.

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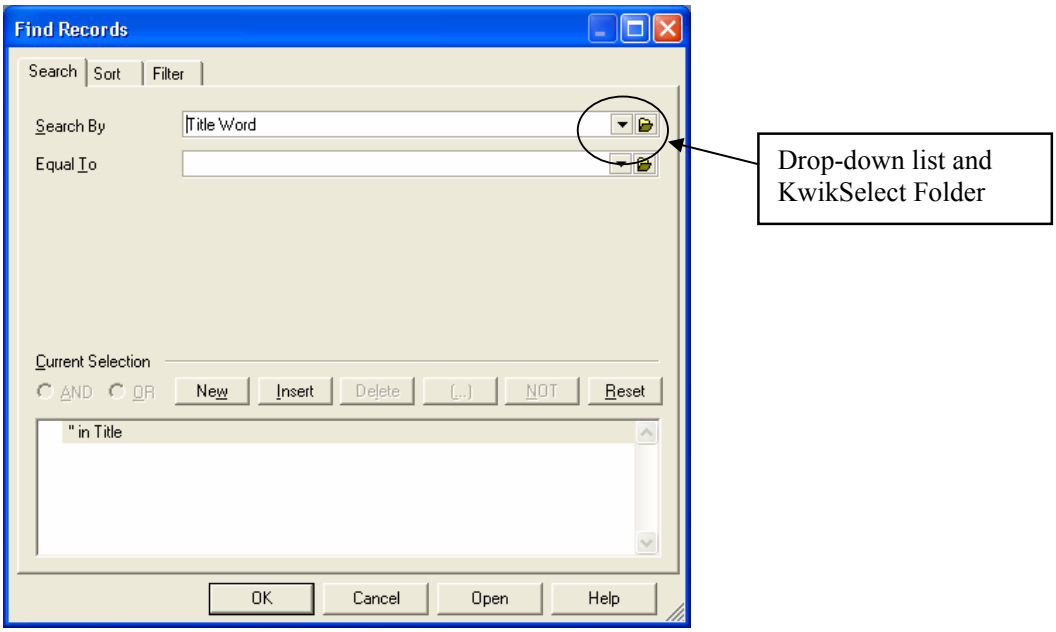
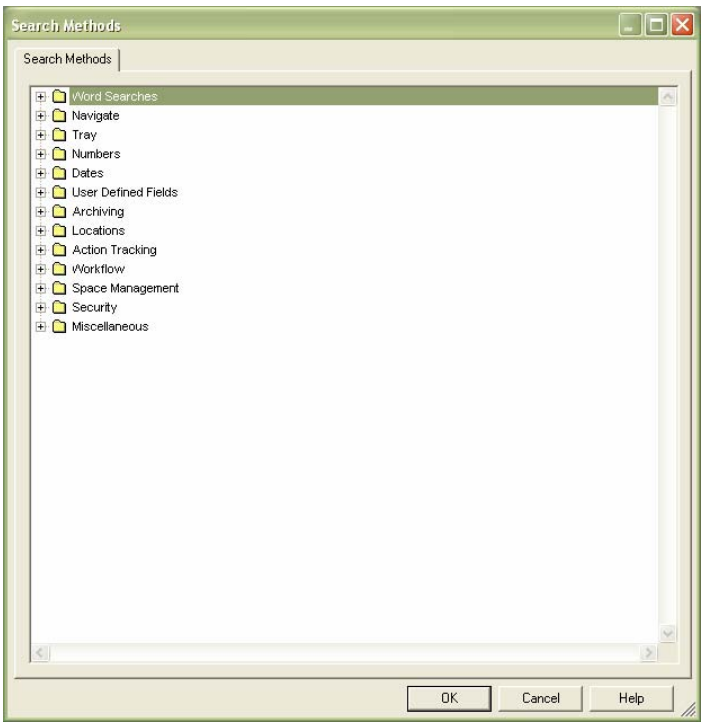


KwikSelect:

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 20. This list will be empty until the first search is performed.

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3.2.1 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.

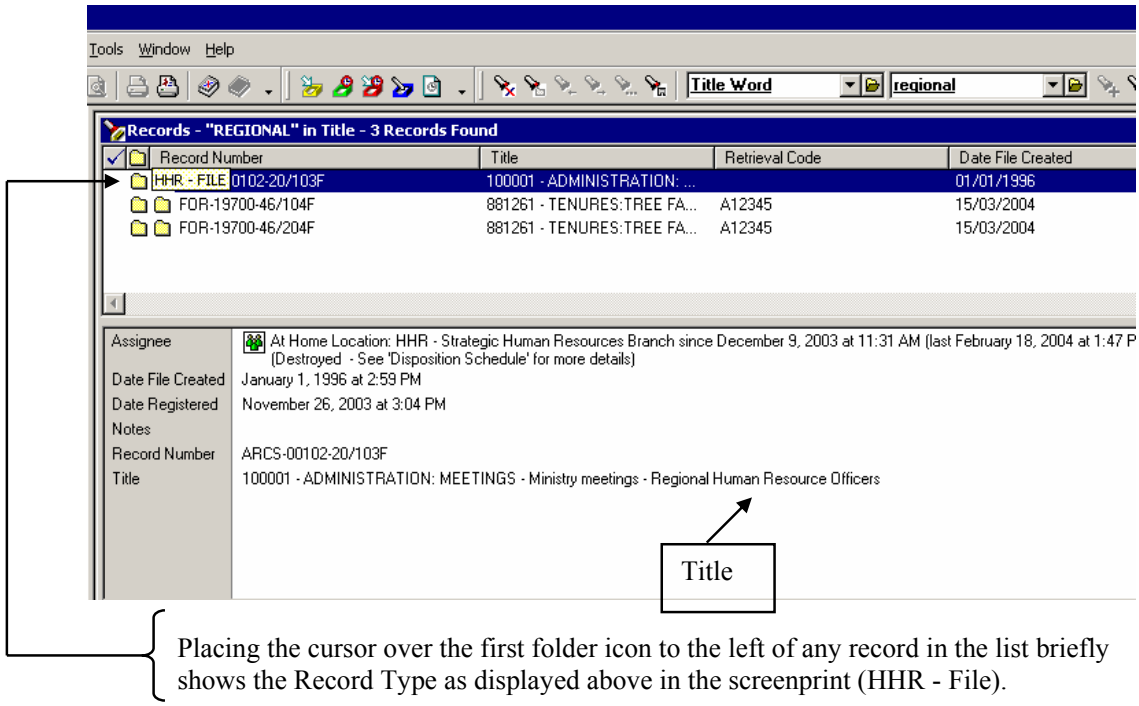
Exercise 1	**Performing a Title Word Search**

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 any record in the list briefly shows the Record Type as displayed above in the screenprint (HHR - File).

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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**. The search results screen will display the results.

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.

3.3 Creating a Record

Various types of records can be set up in TRIM Context™ and these will be discussed in detail further on. The next few pages will explain how to create a File Folder type record.

The following information will demonstrate how to create and register a record in TRIM.

Note: TRIM will check for duplicates based on the Primary, Secondary and Free Text Titles and assigns a unique number to the record number.

A. Toolbar: Click the New Record/Object Button
Alternatively you can select:
B. Keyboard: [CTRL][N] or,
C. Choose: Menu: **File|New**.

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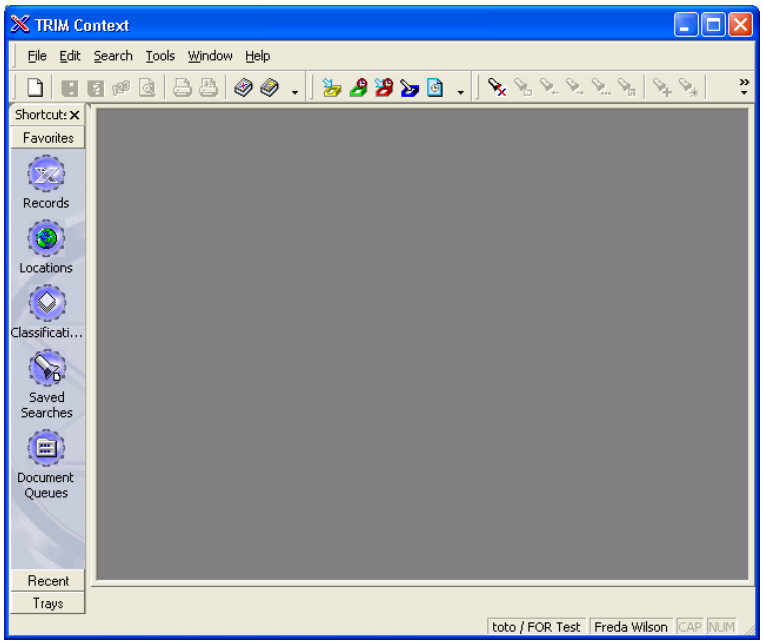
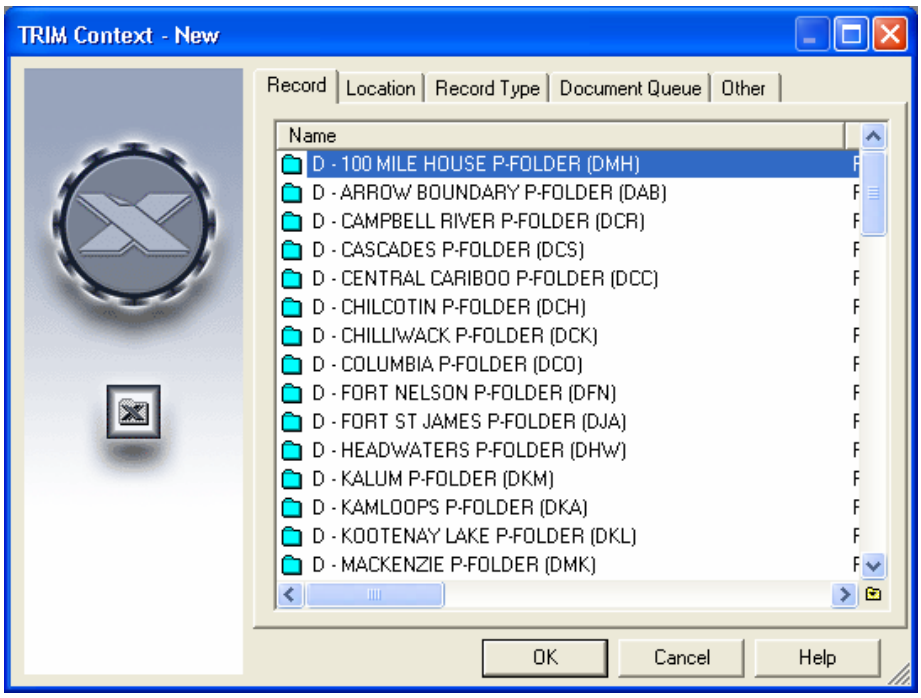


D. The New Record Dialogue box will appear:



E. In the **Record Tab** window, select the appropriate Record Type and press *OK*, or,
- Double-Click on the Record Type, or,
- Press [Enter] on the Keyboard

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Note:	Record Types are configured by the TRIM Administrator or Information Manager and are related to organizational units. You need to know which organization you are creating a record for. A record type is similar to a template on which a record is based. Security measures may prevent you from creating certain Record Types.

F. The Record Entry Form with several tabular pages will be displayed:

G. Fill in all appropriate fields on all Tabs and click the OK Button on the Record Entry Form.

H. The record has now been saved and TRIM will display the completed record.

Note:	The Record Entry Form displays all fields that need to be populated as well as those that are automatically populated when creating a new record. These fields are designed to capture the Metadata about a record. The Form also may have multiple tabs, so ensure that you fill in all required fields on all screens. Each Record Type may have a different Record Entry Form.

3.3.1 Record Entry Form Tabs and Fields

The Record Entry Form may vary for different types of records. The following example will describe the File Folder Record Entry Type form that can be used to create a File Folder in TRIM. As with all Windows based applications, the [Tab] key can be used to move forward from field to field within a dialogue box or screen. The [Shift] [Tab] keys can be used to navigate backward through fields. For those who prefer to use the mouse, you can click in a field to begin entering data.

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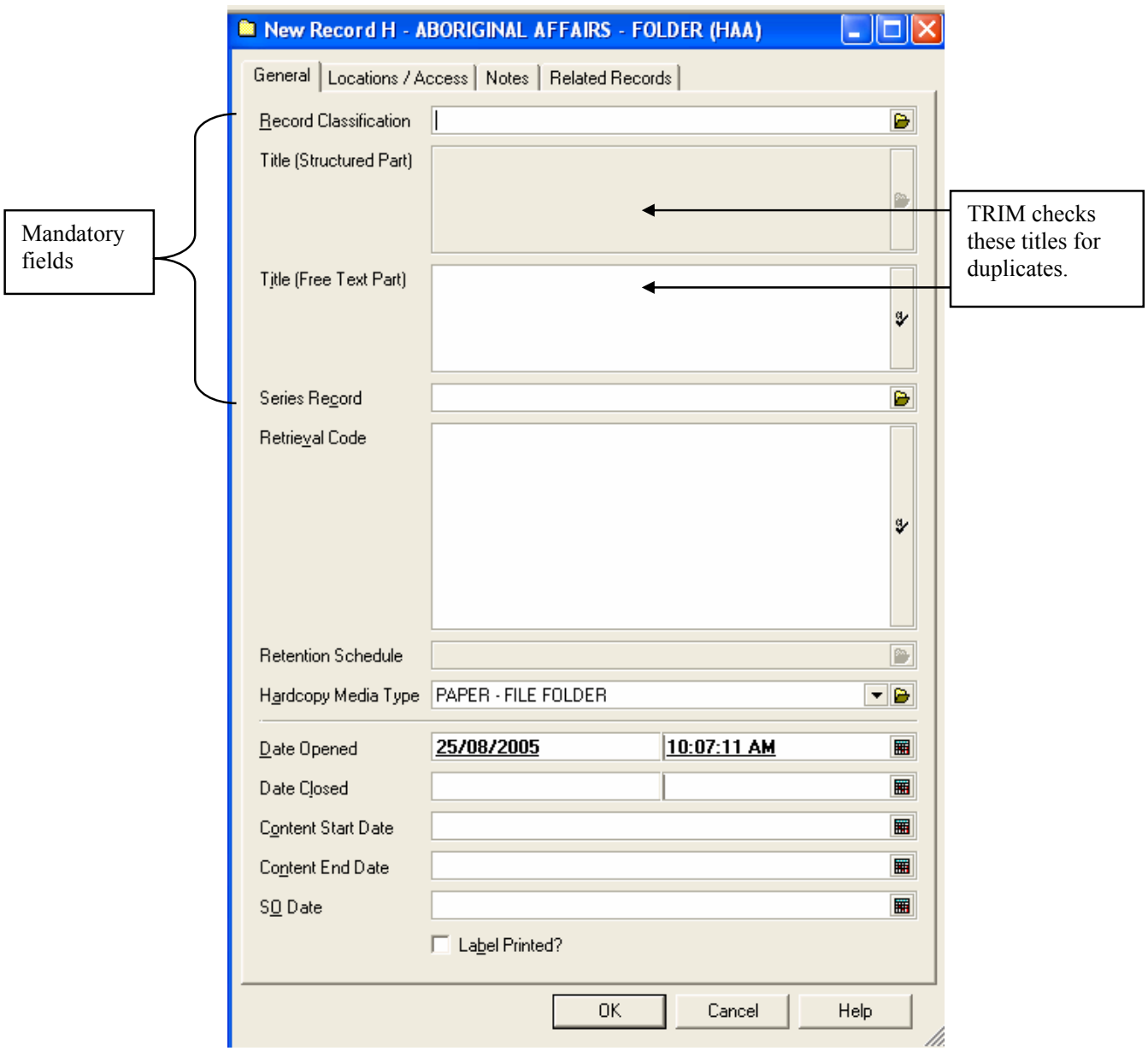

3.3.2 General Tab

The General Tab is the first screen to be completed when you create a record. You will not be able to continue until all of the mandatory fields have been completed with the appropriate information. TRIM will prompt you if you miss a field or do not provide the acceptable data.

3.3.2.1 Record Classification

This field is where you select which classification the new record will be classified against. If you know the exact classification you can type it into the field. Or, you can click the **KwikSelect** button and the Classifications list will be displayed. See the following

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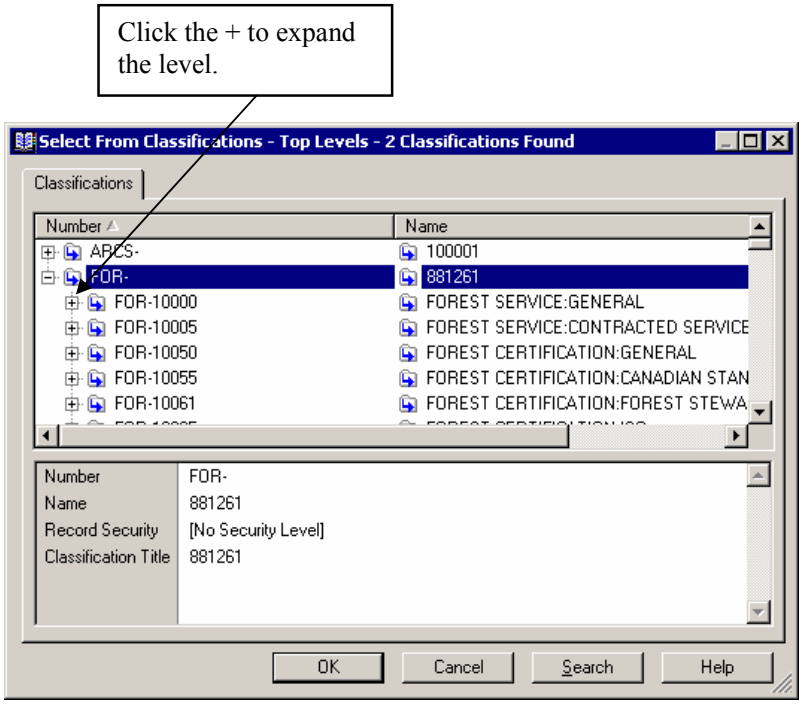
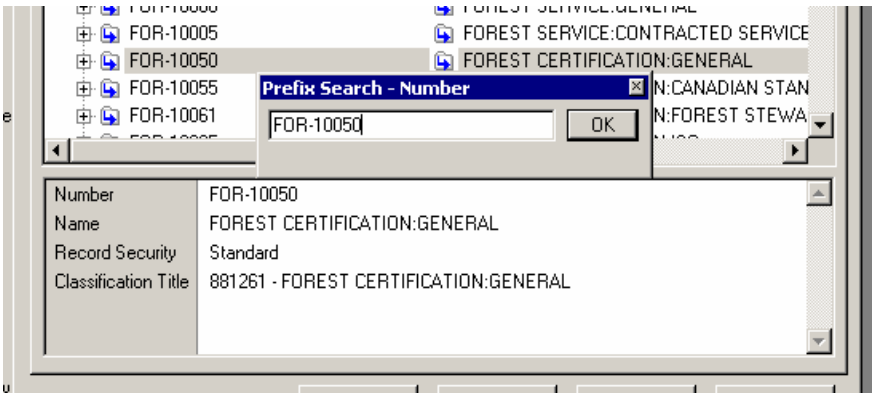
example:



If you know the ARCS or ORCS primary level you can enter **ARCS-[*primary level number*]** and TRIM will display that level of classification. The Ministry of Forests' ORCS are displayed with the prefix **FOR** as seen in the following screenprint. As you begin typing, the information will appear in a Prefix Search Box in front of the Classifications List screen similar to the following:



Or, you can navigate through the Plan until you find the appropriate Level. You can also use the Search Button to locate the desired Level. You can also press [**F7**] to invoke the search screen.

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You must select a secondary identified by the Open Book icon:

This is the lowest level of classification.
Click *OK* and the Classification Number will be inserted into the Record Classification Field. TRIM will automatically insert the Classification Level Name into the **Title (Structured Part)** Field.

3.3.2.2 Title (Free Text Part)

Enter an appropriate free text title into this field. This title should be meaningful and describe the contents of the record.

3.3.2.3 Series Record

Enter the specific series to which this record will belong such as, **OPR**, **Non-OPR** or **Exec**. You can do this by typing the first letter of the series type after which TRIM will complete the rest of the series name. For example, typing: **O** will insert **OPR**. If you are choosing **NON-OPR,** you will be given 3 choices:

1. Non-OPR nil DE
2. Non-OPR 5y DE
3. Non-OPR 10y DE

You will need to know the retention schedule appropriate for that classification (see the OPR Name field for that Classification)

3.3.2.4 Retention Schedule

The retention schedule defaults to OPR once the classification is selected. It will change if the series selected in 3.3.2.3 is a Non-OPR or EXEC schedule.

3.3.2.5 Retrieval Code

This field can be an abbreviation of the Free Text Title such as **MVS** for Motor Vehicle Safety as seen in the following example:

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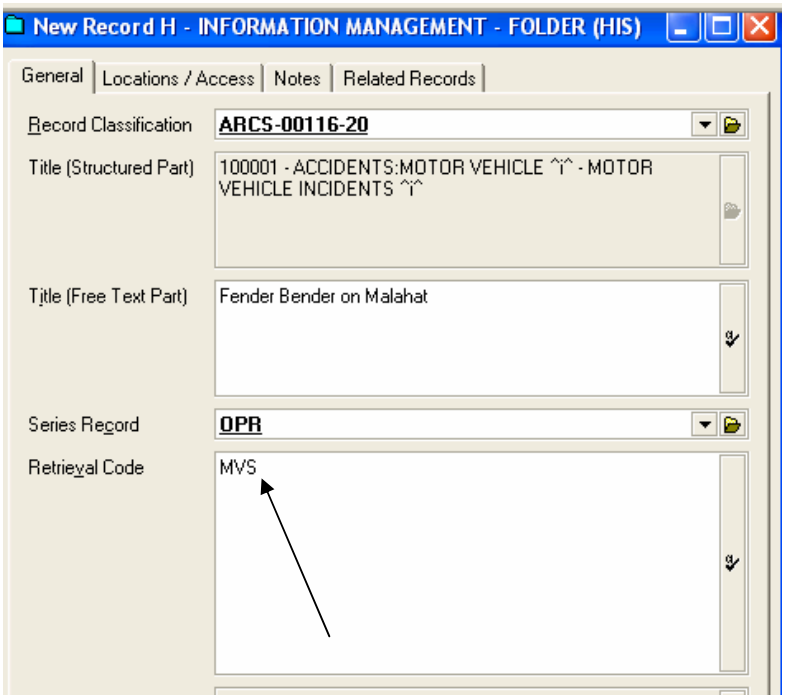
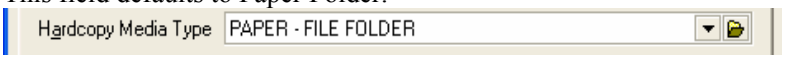


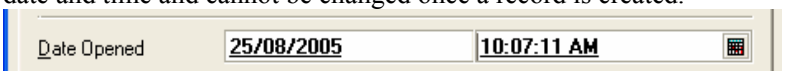
3.3.2.6 Hardcopy Media Type

This field defaults to Paper Folder.



3.3.2.7 Date Opened)

This date indicates when the file became available for use. The date defaults to the current date and time and cannot be changed once a record is created.



Note: *Once the record is saved, an Information Worker does not have permission to change this date. Only the Administrator or an Information Manager has permission to do so. This may occur where information is discovered that is prior to the open date of this file.*

3.3.2.8 Date Closed

This date indicates when the file is no longer available for use, (for example, after fiscal year end for fiscal year files). See also Chapter 6 - 'Record Maintenance'. The date is blank at the time the file is created.

3.3.2.9 Content Start Date (Date Paper is placed in File Folder)

This date is a user-defined field and is the date of the earliest material contained in the file.

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3.3.2.10 Content End Date

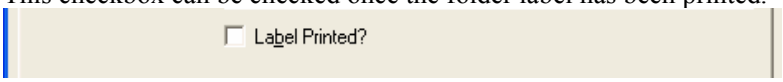
This Date is a user-defined field and the date of the latest material contained in the file.

3.3.2.11 SO Date

This date indicates when the file is closed according to the SO criteria of the classification. See also Chapter 6.7 – 'Maintenance of SO files'. This date is a user-defined field and is left blank at the time the file is created.

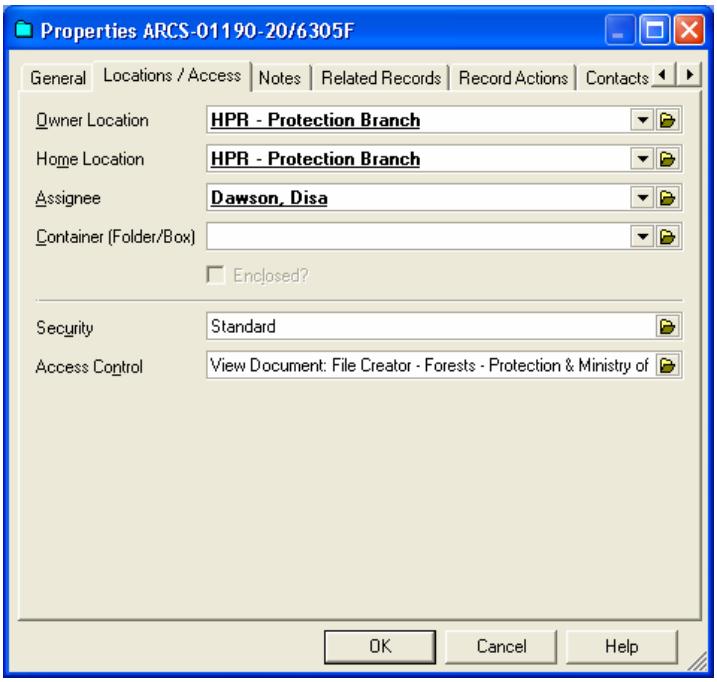
3.3.2.12 Label Printed?

This checkbox can be checked once the folder label has been printed.



3.3.3 Locations/Access Tab

The fields on this screen will already be populated for you by TRIM. The defaults for these locations were defined when the TRIM Administrator designed the Record Type Entry Forms. This means you don't have to enter any data in this screen. The following information explains how these types of locations are defined in TRIM.



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3.3.3.1 Owner Location

The Owner Location is the person or area that has legal responsibility for the record. In the Ministry of Forests the Owner Location is an organizational unit such as a branch. The default is determined by the Record Type.

3.3.3.2 Home Location

The Home Location is where the record resides when it is not in use. Currently this defaults to the branch of the record type. For records outside Headquarters, the Home Location will be the originating branch.

3.3.3.3 Assignee

The Assignee is the person or area that physically has that record in their possession. If this field is accurately maintained, the record will always be easy to locate. Currently, this defaults to the Logon Branch within the ministry. When the file is first created this Assignee will be changed to the Home Location of the file or to the person to whom the file is being charged out.

3.3.3.4 Container(Folder/Box)

This is the folder/box that this record will be placed in. For example a document is contained in a folder. Folders are contained in boxes.

Type the Record Number into the Container Field. If you do not know the Container's Record Number, use the **KwikSelect** list to search for the Container. Alternatively use the Drop-down List to see the most recently used Containers.

3.3.3.5 Enclosed?

This checkbox is used in conjunction with the Container Field and is used to indicate if the record has been physically placed in its container. Check this box if the record is to be enclosed in its container. This field is grayed out until a container is chosen.

3.3.3.6 Security

This field shows the Security level that has been set within TRIM.

3.3.3.7 Access

This field shows who has access to this record and the type of access granted.

3.3.4 Notes Tab

This screen allows free form text to be entered. This would be similar to "keywords" from the QRMS system.

Note: Files converted from QRMS - 'Tombstone' data is recorded here.

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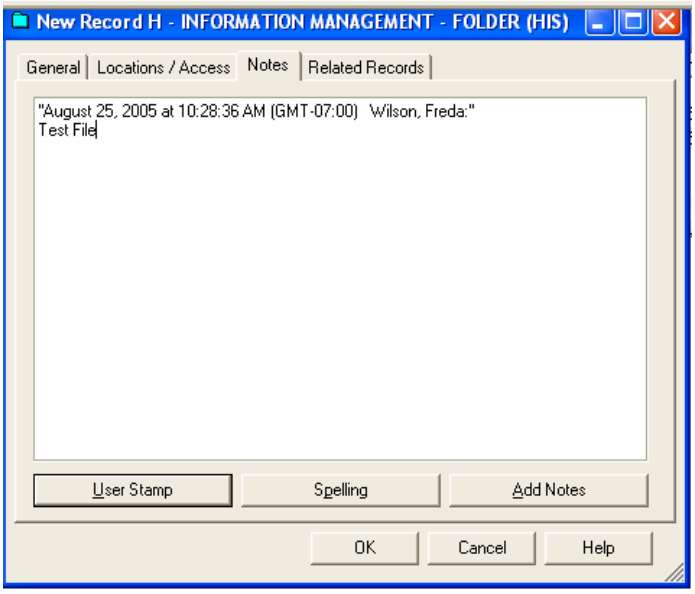

3.3.4.1 User Stamp

This button adds the date and time and current login user id. It is recommended this be used each time a note is added.

3.3.4.2 Spelling

This button checks the notes for incorrectly typed words.

3.3.4.3 Add Notes

This button allows new notes to be added after a file has been created.

3.3.5 Related Records Tab

This tab shows what the record is related to. In the below example, the record is related to the OPR Series. This screen can also show a relationship to another record.

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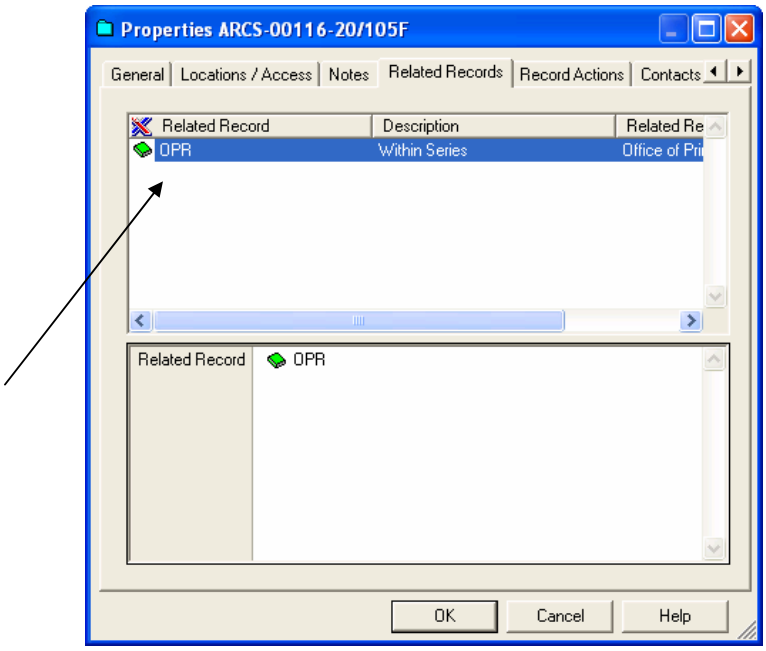

Note: A supplementary file always exists in relation to another record and will have a relationship of *Alternatively within*. The parent record will have a relationship of *Alternatively contains*.

Now that you have taken a look at the Record Entry Form Tabs and the fields on each of those tabs try the following exercises to create new File Folder records.

3.4 How Do I Create a File Folder Record?

The following exercises will show you how to create a File Folder Record.

Exercises - Creating Records

Exercise 1 Creating a File Folder Record

This exercise will demonstrate how to create a **File Folder** in TRIM Context.

1. You should be at the main Context screen.
2. Click the New Record/Object Button on the toolbar.
3. Choose the HIS File Folder Record Type from the first screen and click *OK* to open the Record Data Entry Form.
4. At the General Tab screen choose the correct Record Classification from the **Drop-down list** or the **KwikSelect list**.
5. Type: ABC Consulting Ltd. in the **Title** field.
6. Enter Non-OPR in the **Series** field and click the **KwikSelect** field to list the Non-OPR series.
7. Choose a Non-OPR series that matches the Retention Schedule for the Classification chosen.
8. Leave the **Hardcopy Media Type** field as is.

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9. Type: ABC in the **Retrieval Code** field.
10. Click the **Notes Tab** and add some notes and click the **User Stamp**
11. Click *OK* to create the record.

    A message will appear on the screen advising that the record is being saved.

    Once the record has been created TRIM Context will list it on the screen as 1 Record Found.

12. Right-click on the record and choose **Properties** from the shortcut menu to view the properties. If you mistyped the title, you can correct it at this point and save the record again.

Exercise 2	**Creating a File Folder Record**

Complete the following exercise to create a **File Folder** in TRIM Context based on the steps you have just learned.

1. You should be at the main Context screen.
2. Click the New Record/Object Button on the toolbar.
3. Choose the HIS File Folder Record Type from the first screen and click *OK* to open the Record Data Entry Form.
4. At the General Tab screen choose the correct Record Classification from the **Drop-down list** or the **KwikSelect** **list**.
5. Type: TRIM Information Worker Training Handout – Your Name in the **Title** field.
6. Enter Non-OPR in the **Series** field.
7. Leave the **Hardcopy Media Type** field as is.
8. Type: TRIM in the **Retrieval Code** field.
9. Add any appropriate notes to the **Notes Tab**.
10. Click *OK* to create the record.
11. View the properties once the record has been created.
12. Exit from the record.

3.5 Copy Record

TRIM provides a Copy Record feature to make it faster and easier to create multiple records of the same classification.

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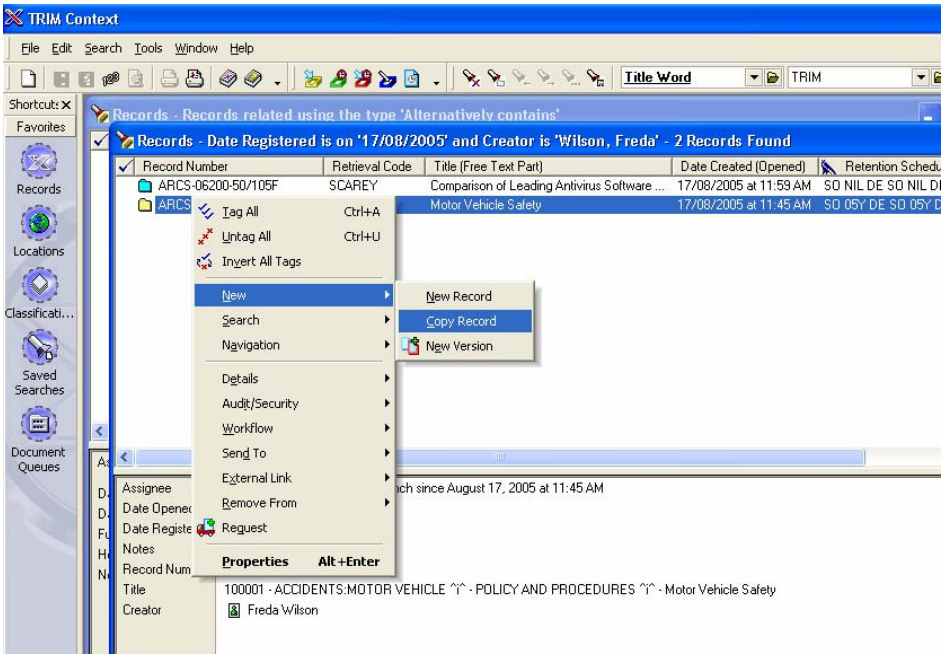
Note: Do NOT use the copy function to create a record of a different classification, as the retention schedules may be different.

You may want to copy a record that you just created or copy an existing one. Display the record to be copied on the screen and right-click to open the short-cut menu.

A. Choose **New>Copy Record**. See the screenprint below.



The Copy Record function will display the Copy Record dialogue box allowing you to select which metadata to copy to the new record. Some of these fields will be copied by default and are deactivated on this dialogue box.

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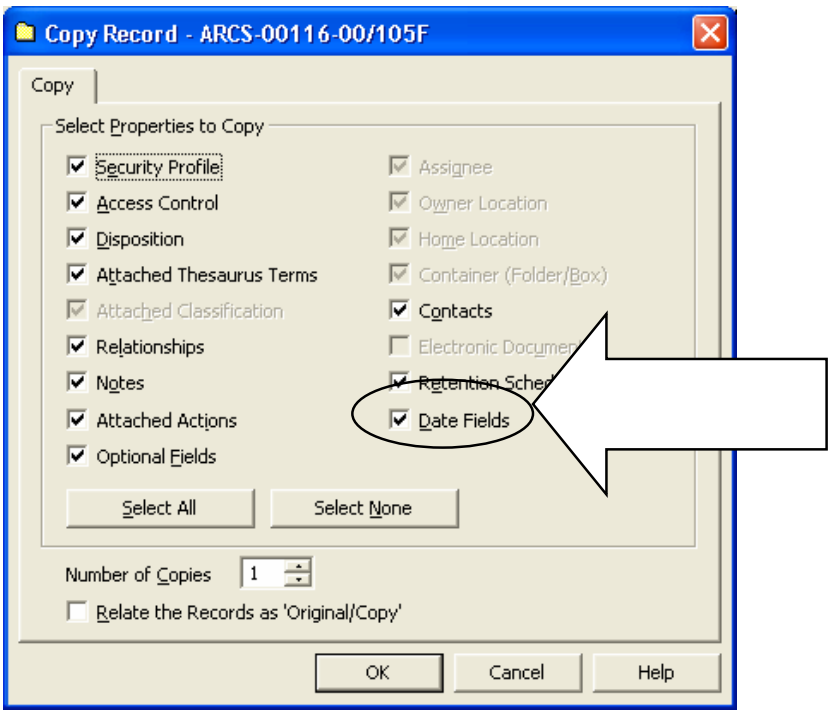
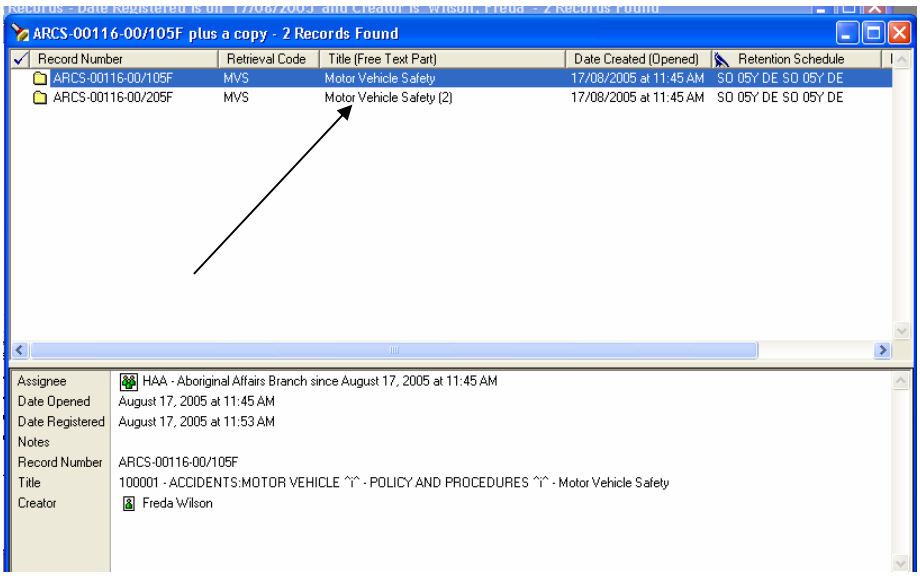


You can select the number of copies that you wish to make by selecting the up arrow until you reach the desired number, or you can type the number manually. Once you have selected the number of copies and selected any additional metadata fields.

B. Click *OK* to create the new record.



C. After the record has been copied in TRIM, you should amend the properties to reflect that of the new file.

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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

3.6 How Do I Create a Supplement Record?

A Supplement file identifies material related to a particular file but which cannot be physically located within the parts of a file. For example, this could be a large map, a video tape, or a photograph.

Supplement files are also used to accommodate enclosure files (FOI request files = main file + supps; supps = photocopies of requested material).

We will use the Copy Record function to create a supplement record and relate it to the parent record.

Note: Security for supplement type records may be different from the parent record.

The following exercises will show you how to create a Supplement Record using the Copy Record feature and relate it back to the parent record.

Exercises - Creating Records

Exercise 1 Creating a Supplement File Record

This exercise will demonstrate how to create a Supplement File using the HIS Record Type and how to relate the supplement file to the parent file. More information on relating records follows the next couple of exercises.

1. You should be at the main Context screen.
2. Search for the record that you just created in the last exercise (TRIM Information Worker Handout - your name) that the new supplement record will relate to.
3. Choose **New>Copy Record**
4. Select the properties to copy over to the new record.
5. Click *OK* to create the record.
6. Right-click and choose properties once the supplement is created.
7. Add **SUP01** at the beginning of the Free Text Title (this is required on all supplemental records) and change the title to **TRIM Quick Reference Guide**.
8. Click the KwikSelect button and choose a different media type in **Hardcopy Media Type** field.
9. Add any appropriate notes to the **Notes Tab**.
10. Click the **Related Records Tab** and right-click to open the short-cut menu.

11. Choose **New Related Record**. This will open the Relationship Dialogue Box.

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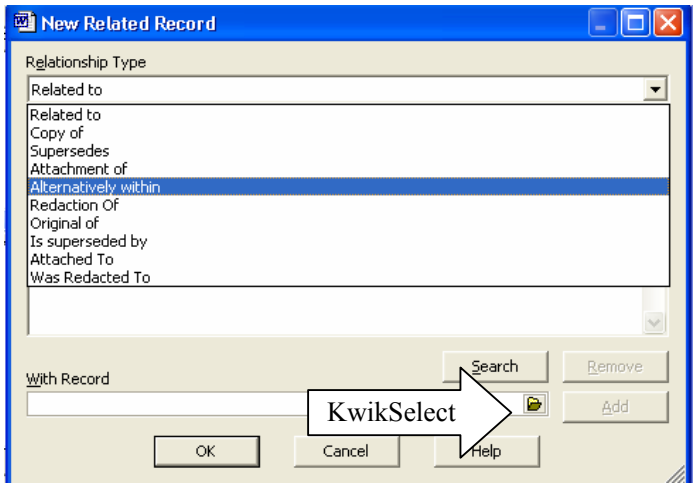
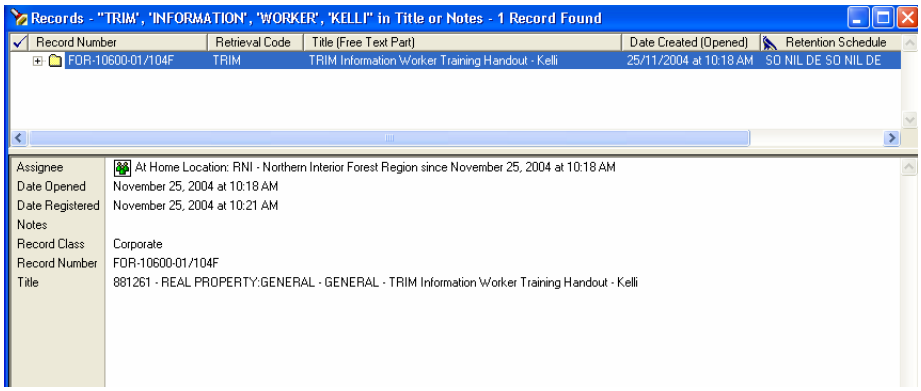
12. Choose **Alternatively Within** from the dropdown list.



13. Click the KwikSelect button to locate the record that this supplement will be related to - *TRIM Information Worker Handout - Your Name*.



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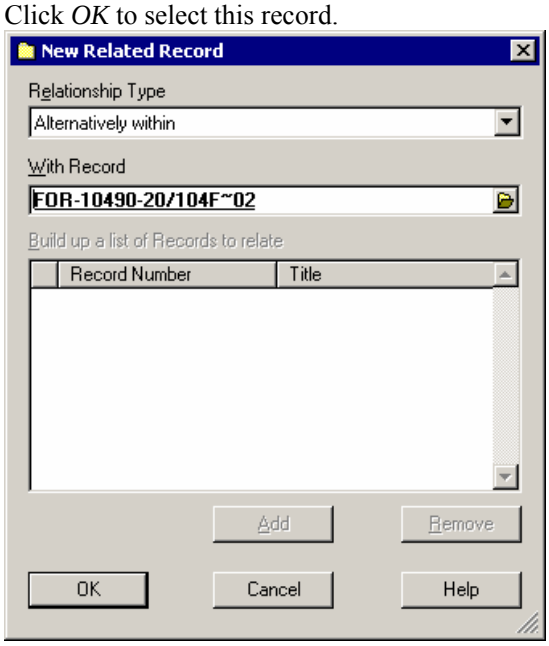
14. Click *OK* to select this record.



15. Click *OK* to confirm. You will be returned to the Related Tab screen.
16. Click *OK* to save the information and update the supplement record.

Exercise 2	**Creating a Supplement File Record**

Complete the following exercise to create a Supplement File using the HIS Supplement Record Type, based on the steps learned in the previous exercise.

1. You should be at the main Context screen.
2. Create another supplement record using the copy record function and relate it to the same parent record as in the previous record.
3. Choose a different media type.
4. Change the Free Text Title or Notes to identify more specifically the content of the Supplement.
5. Relate the new supplement to the parent file as "alternatively within" (at the "Related Records" tab).
6. Exit from the record.

3.7 How Do I Relate Records?

This function in TRIM permits you to relate two or more records to each other. For example, Files can be related to Supplement Files. Relationships are useful for grouping records with related information together. Establishing relationships between records can assist people with future inquiries. The Related Records function offers several types of relationships. We will look at only two, namely, **Related to** and **Alternatively within**.

Relationship	**Description**

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Related to	Use to document a cross-reference to another specific record.
Alternatively within	Use this relationship on a Supplementary record to relate it to the parent record.

The following exercises will show you how to relate two records to each other.

Exercises - Relating Records

Exercise 1 **Relating a Record**

This exercise will demonstrate how to relate records.

1. You should be at the main Context screen.
2. Search for the record named **ABC Consulting Ltd**. that you just created.
3. Right-click on the record and choose **Relate>Relate** from the shortcut menu.
4. Select **Related to** from the **Relationship Type** drop-down list.
5. Search for the record named **ABC Consulting Ltd. - Contract**
6. Click *OK* to relate the record.
7. View the properties once the record has been created
8. Exit from the record.

Exercise 2 **Relating a Record**

Complete the exercise below to relate a record based on the steps learned in the previous exercise.

1. You should be at the main Context screen.
2. Search for the record named **ABC Consulting Ltd. - Contract**
3. Right-click on the record and choose **Relate>Relate** from the shortcut menu.
4. Select **Alternatively within** from the **Relationship Type** drop-down list.
5. Search for the record named **ABC Consulting Ltd**.
6. Click *OK* to relate the record.
7. View the properties once the record has been created
8. Exit from the record.

Exercise 3 **Relating a Record**

Complete the exercise below by relating the following records to each other based on the steps learned in the previous exercise.

1. Create two new records and make one a supplement type record.
2. Use **Related to** and **Alternatively within** as the relationship types in the appropriate records.

Remember that you can use the Copy Record function to create the second record.

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3.8 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. A record in TRIM Context is:

   a. A round disc with a hole in the centre.
   b. A sports term.
   c. Evidence of a business transaction.

2. Describe what is meant by the following locations:

   a. Assignee

      _____

   b. Home

      _____

   c. Owner

      _____

3. Why is it ***not*** necessary to populate the fields on the Locations Tab when creating a record?

   _____

   _____

   _____

4. What prefix is required at the beginning of the Free Text Title of a supplement record?

   _____

5. How do you perform a Retrieval Code Search?

   _____

   _____

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

   _____

   _____

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3.9 Summary

In this Chapter you learned:

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

You should now understand how to search for records and how to create different types of records as well as relate records.

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4. Filing Electronic Documents using TopDrawer

4.1 Objectives

In this Chapter you will learn:

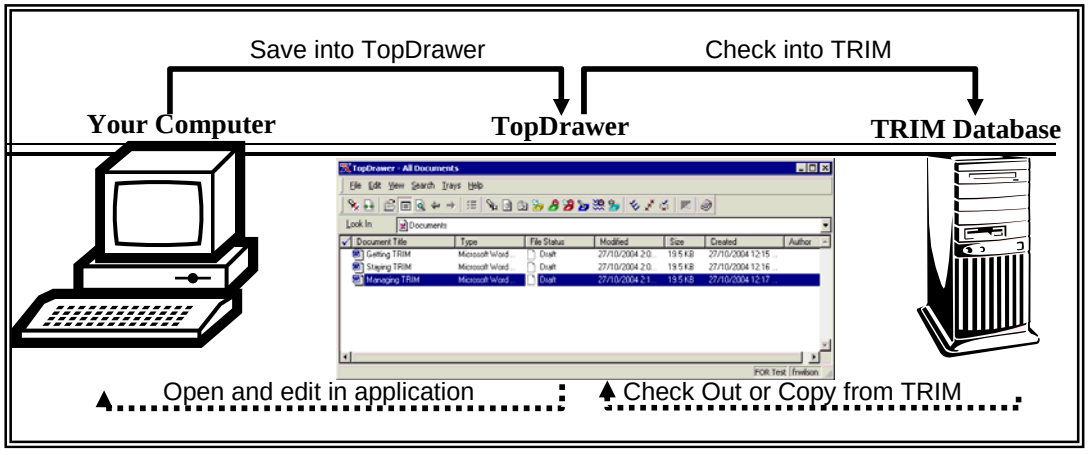
1. What is TopDrawer
2. How to save draft Word documents into TopDrawer.
3. How to file electronic documents into TRIM using TopDrawer.

Following completion of this Chapter you will know how to launch TopDrawer and how to file electronic documents using this component. You will also be able to test your knowledge of this topic by answering the questions at the end of this chapter.

4.2 What is TopDrawer?

TopDrawer is the module in TRIM that helps each user manage his/her own working documents. TopDrawer connects to the central repository (TRIM Context) where this information is made available to the organization and can be properly managed throughout its life.

Important documents, graphics, spreadsheets, presentations and so on, can be captured through TopDrawer, managed by TRIM and stored in the TRIM electronic store. TRIM Context will also maintain revision and version control over any documents checked in and out of TopDrawer.



TopDrawer supplies the necessary link between managing working documents and storing those documents in TRIM Context.

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Document Management is made easy through TopDrawer by allowing you to work on those documents without having to maintain a constant connection to the TRIM Database and Object Store.

TopDrawer allows you to work on documents independent of a network, yet connections can be made to a network when searching for existing documents within TRIM, checking in changes to a document or registering new documents.

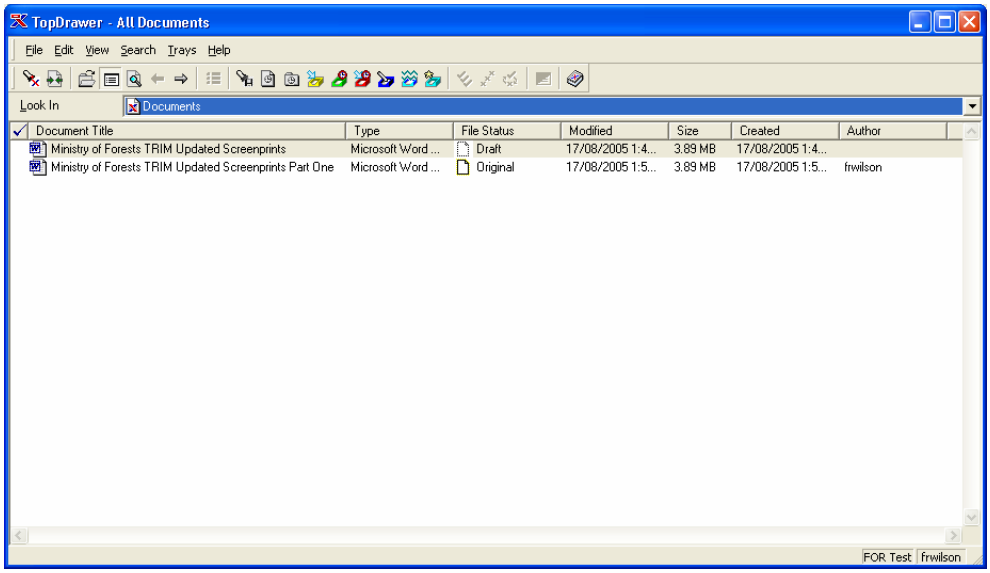
TopDrawer is unique to each user. It can be used to manage:

- Documents being prepared for eventual cataloguing in TRIM
- Documents checked out of TRIM for editing before returning to TRIM
- Record Metadata maintenance functions.

4.3 Launching TopDrawer

There are several ways to access and use TRIM TopDrawer. These include:

- Standalone TopDrawer – Launched from the TopDrawer icon on the desktop.



- ODMA TopDrawer – Launched when saving a document from MS Word or a presentation from MS PowerPoint.

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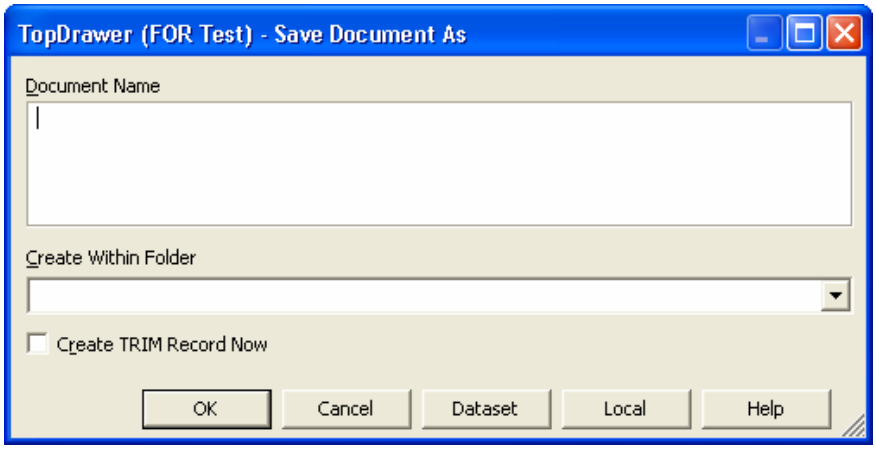


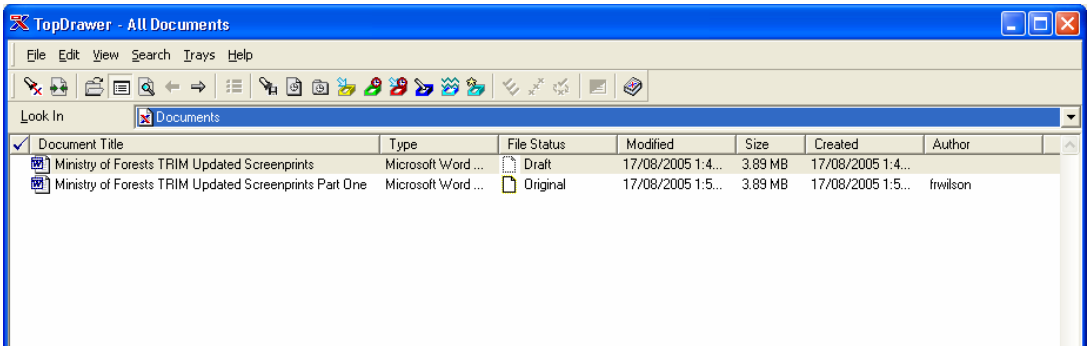
4.4 Standalone TopDrawer

Standalone TopDrawer is often the preferred way of accessing TopDrawer for those users who are modifying or saving documents from several different desktop applications.

Standalone TopDrawer allows all types of documents to be displayed and opened, providing you have access to the authoring application. The look and behavior is virtually identical to ODMA TopDrawer that has been launched from within an application. There are some differences between the two:

Standalone TopDrawer does not have the OK, Cancel, Local, or Help Buttons because you can minimize this version of TopDrawer and access other applications while it is still open.

This format of Standalone TopDrawer allows you to tag multiple documents to be opened or checked in.



TopDrawer can be launched as a standalone application that can be opened from a shortcut icon

on your desktop, from a shortcut on the **Taskbar** or from **Start - Programs - TRIM Context** – **TRIM TopDrawer** menu. Standalone TopDrawer will show all documents checked out to the user from the selected dataset irrespective of the

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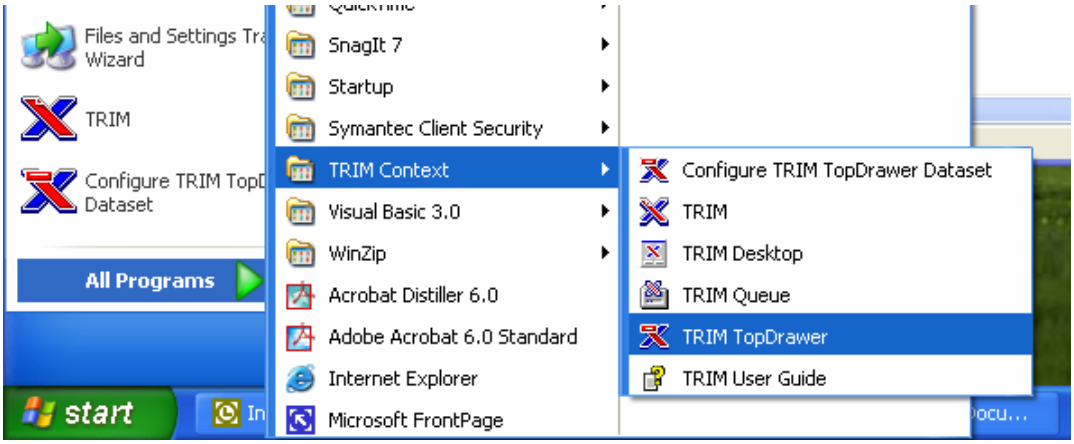
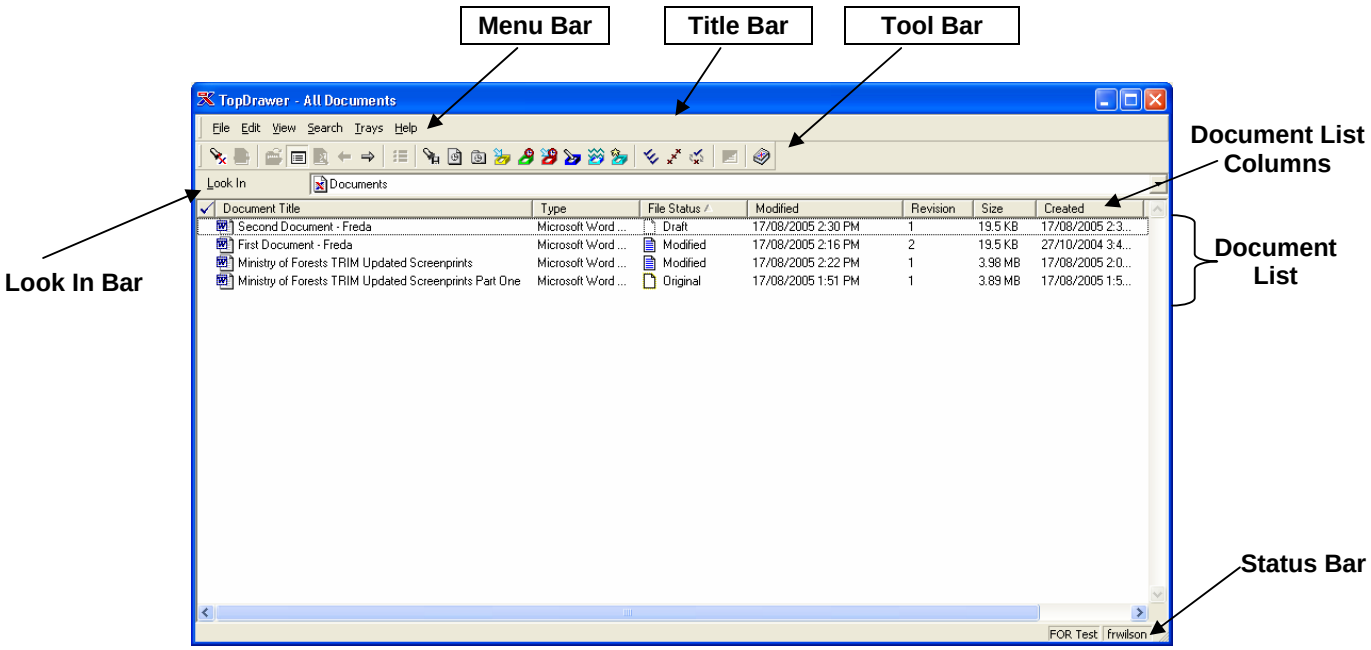
application they were created in.



Standalone TopDrawer allows you to select multiple documents using TRIM Context's tagging functions:

- Tag All
- Untag All
- Invert All Tags.

Listed below is a description of the parts of the TopDrawer window.



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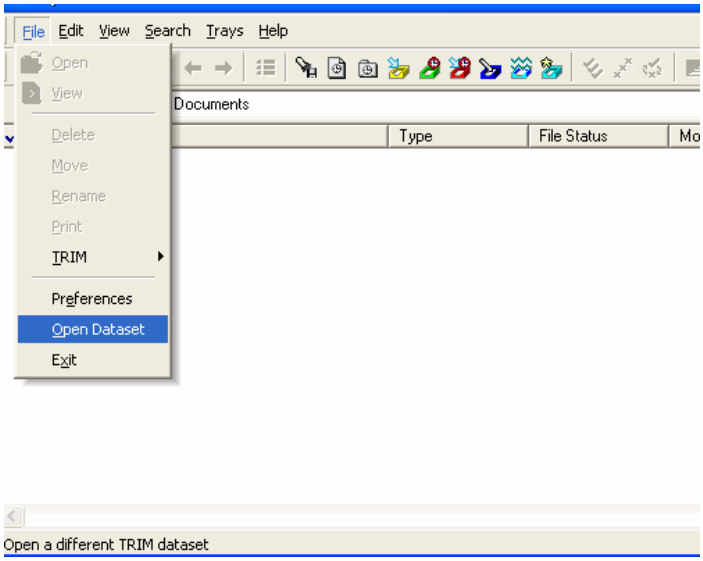
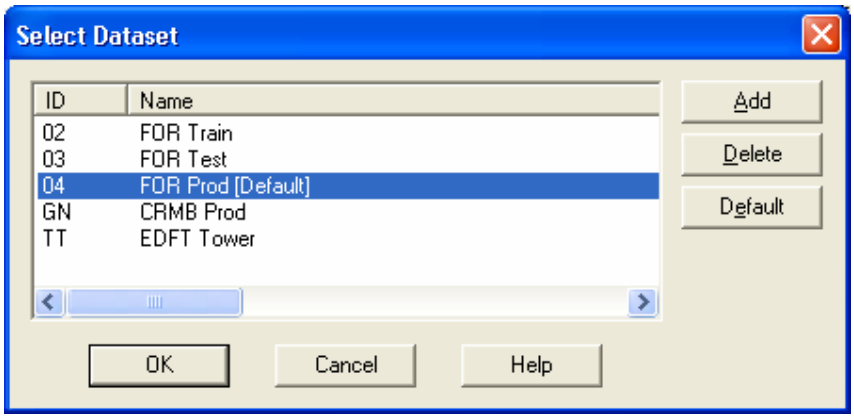
4.5 Open Dataset

This option displays the **Select Dataset** dialogue box. When multiple TRIM datasets are used, each one will have its own instance of TopDrawer. Select the TopDrawer you wish to open next and click *OK*.

A. Choose **File|Open Dataset** from the TopDrawer Menu



The following Dialogue Box will appear:



Add

The **Add** button is used to connect TopDrawer to the correct Workgroup server. This will also add the TopDrawer dataset to the list in the **Select Dataset** Dialogue Box. If multiple datasets are being used and your access to them is through a different Workgroup Server this would need to be set correctly to allow a document to be checked into the correct dataset.

B. Click **Add** to open the TRIM Dataset Dialogue Box.

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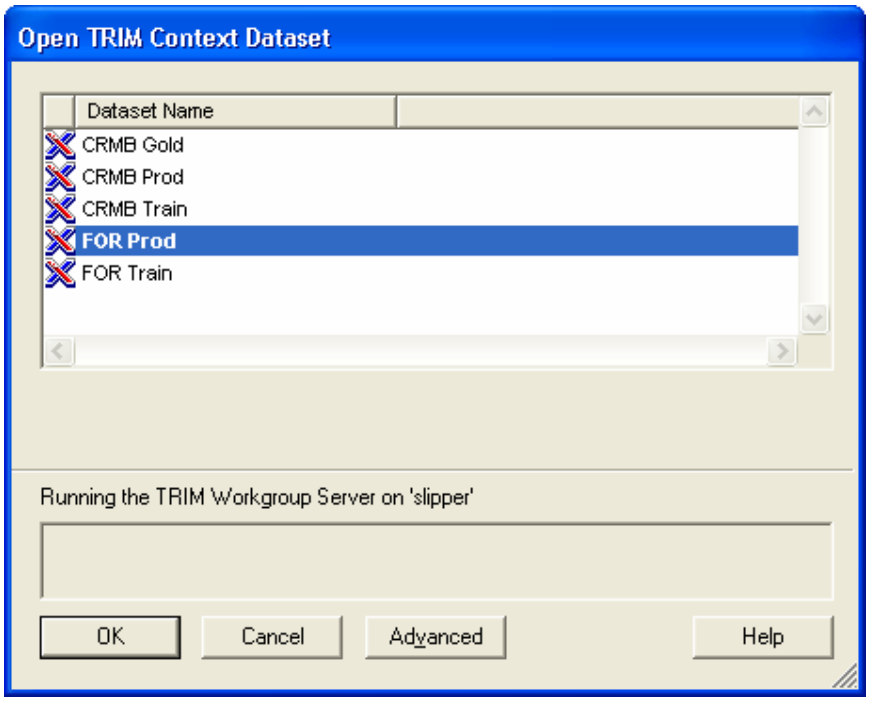


C. Select the appropriate Dataset (For PROD) and click *OK*.

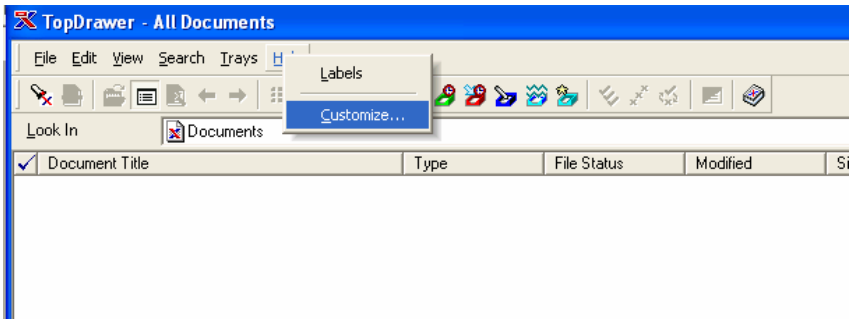
4.5.1 Title Bar

The Title Bar will display what the Document List is showing. If you have filtered the Document List the Title Bar will indicate what is being displayed. TRIM TopDrawer - All Documents indicates that no filter has been applied. When using TopDrawer as an extension to Windows Explorer, the Title Bar will simply read TopDrawer.

4.5.2 Menu Bar

The Menu Bar contains all the functions that are available under specific categories in TopDrawer. When using TopDrawer as an extension to Windows Explorer, some TopDrawer Functions have been added to the File Menu.

The Menus can be modified if you are using Standalone TopDrawer or ODMA TopDrawer. Right-click on the Menu Bar and select Customize.



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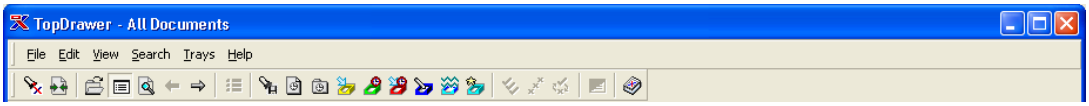
4.5.3 Toolbar

The Toolbar contains buttons that represent different functions that are available under the Menu Bar. The Toolbar allows you to perform a function by clicking the appropriate button.

When you select TopDrawer, the TopDrawer toolbar will display. Most of the options available from the right-click menu are duplicated on the TopDrawer toolbar. The Exception to this is Look In (available for Standalone and ODMA integrated TopDrawer only).

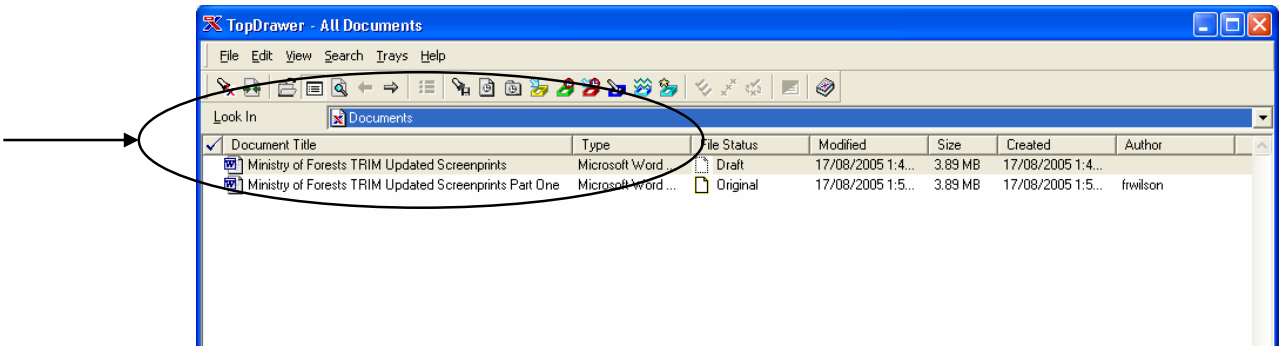


4.5.4 Look In Bar

The Look In Bar is only available from Standalone TopDrawer or ODMA TopDrawer and allows you to modify the document list, so that it displays either:

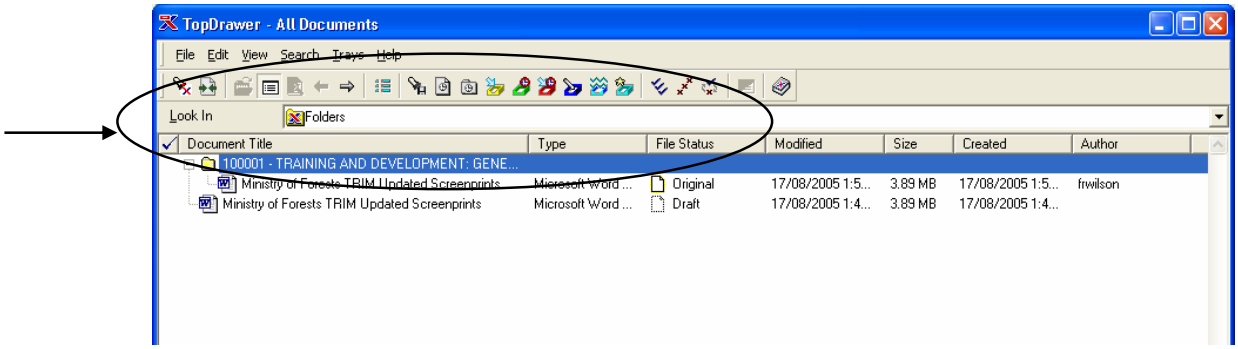
Documents

This option will display all the documents in TopDrawer. If a filter has been applied, this option will display only those documents that match the filter.



Folders

The option will display the documents in TopDrawer within the TRIM Containers (folders/files) that the documents have been associated with. If a document has not been associated with a Container, it will normally be displayed at the end of the Folder List. Click on a Folder to reveal the documents contained within.



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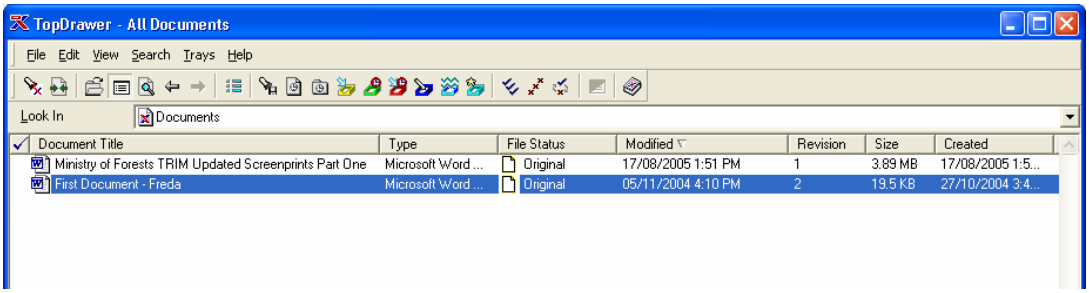
The Look In Bar is not displayed if using TopDrawer as an extension to Windows Explorer. Instead there are buttons on the Toolbar that perform this function.

4.5.5 Document List Columns

The Document List Columns contains the header row for the information being displayed in the Document List. Using the Format Columns function from the right-click menu, you can change the columns being displayed and the order they appear in. The columns may be resized or used to change the sort order of the Document List. Following is an example of some of the columns that can be displayed in TopDrawer:



Document Title

This column displays the Document Title for Draft Documents or the TRIM Record Title for all TRIM Documents. If the format of the document is known, the appropriate application icon will be displayed next to the title. For example, a Word Document will have a Word icon displayed.

Type

This column displays the type of file listed, such as, Microsoft Word, Excel, and PowerPoint, etc.

File Status

The Status column indicates if the document has been cataloged into TRIM. A Document can have a status of:

Draft

A Draft Document is an electronic document that has been placed into TopDrawer but has not been registered in TRIM.

Original

An Original Document indicates the document has been registered in TRIM, and has now been Checked Out of TRIM. No modifications have been saved to the document whilst it has been in TopDrawer.

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Modified

A Modified Document indicates the document has been registered in TRIM, and has now been Checked Out of TRIM and modifications have been made and saved to this document whilst it has been in TopDrawer.

Modified

This column will display the date the document was last modified.

Revision

This column will display the next revision number of the document. It will only be populated if the document is updated and checked back into TRIM.

Size

This column will display the size of the document. The size of the document is displayed in either Kilobytes (KB) or megabytes (MB).

The following fields will only be populated on Original or Modified Documents:

Created

This column will display the date the document was created.

Author

This column will display the Author of the document.

Note: *If using TopDrawer as an extension to Windows Explorer, the Document List Columns cannot be changed. If displaying Folders, the document list columns will be Document Title and Status Columns. If displaying Documents, the document list columns will be Document Title and Container Name. The Properties tab will display any other information, for Original and Modified documents.*

Record Number

This column displays the TRIM Record Number assigned to the document.

Container Number

This column displays the Record Number of the container if the document has been contained within another record in TRIM

4.5.6 Document List

The Document List Displays all current Documents in your TopDrawer. This list may be filtered to pinpoint specific documents.

4.5.7 Status Bar

The Status Bar displays the name of the dataset you are connected to, or were last using, and the name of the user logged in. This is a setting that is set in TRIM Context under **Tools|User Configuration>Customize>Status Bar**. The Windows Explorer Shell Extension of TopDrawer does not display this information.

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4.5.8 TopDrawer Right-Click Menu

The Right-click Menu can be used to perform all TopDrawer functions. Just highlight a document in the Document List and right-click to open this menu.

The Right-click Menu offers limited functionality when using the Windows Explorer extension to TopDrawer.

If a function is grayed out in the menu, it means it cannot be performed on the highlighted document.

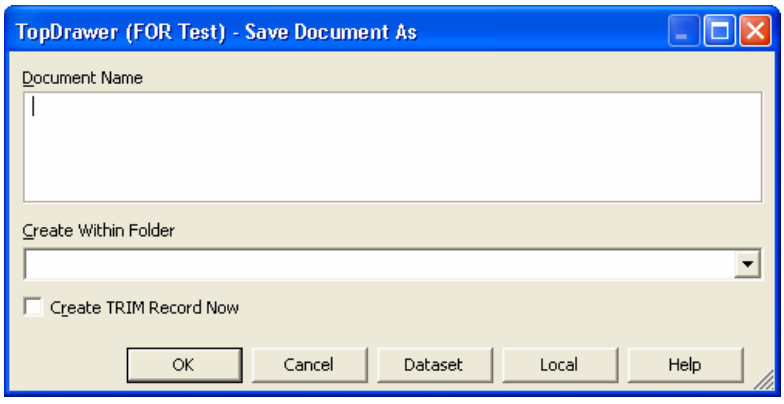
4.6 Filing Electronic Documents

4.6.1 Saving a Draft Document into TopDrawer

The following information describes using TopDrawer from within an ODMA compliant application (such as MS Word), and assumes that this option has been enabled within TRIM Context.

A. Create a document in Microsoft Word,

B. Select **File|Save As** from the File menu and the TopDrawer Dialogue Box will be displayed:



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Document Name

C. Enter the title you wish to give your document in this field. ***When choosing a document title, ensure you do not include personal or confidential information***. The information that is entered into the Document Name field will become the Document Title in TRIM.

D. Click *OK* to save the document into TopDrawer.

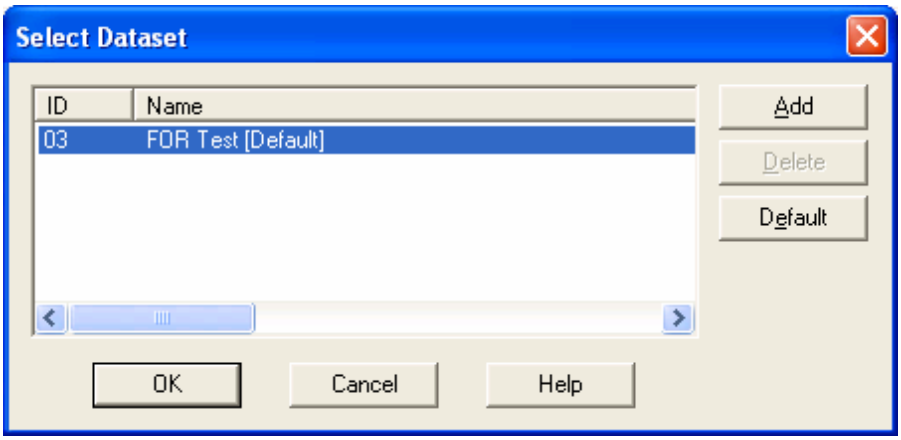
Create Within Folder - (Option to select Folder if available when checking directly into TRIM and not saving document to TopDrawer)

E. This field allows the user to select the TRIM Container/File Folder where the document will be filed only if the Folder appears in the TopDrawer folders list. If not, the drop-down box will be empty and the user can then select the folder from the Record Data Entry Form that will appear after clicking the OK button on the ODMA TopDrawer screen.

Create TRIM Record Now - (Use when checking directly into TRIM and not saving document to TopDrawer)

F. Select this box to register the document in TRIM Context now. If this option is not selected, the document will simply be placed within the user's TopDrawer, with the status of Draft, for later processing.

G. The default Dataset that you need to connect to should already be setup. However, if for some reason you need to connect to a different dataset, then clicking the Dataset button will allow you to choose the TopDrawer for that specific Dataset. Each dataset has its own TopDrawer.



H. Click the **Add** button to select a different dataset or workgroup connection. The dataset selected will appear in the Select Dataset Dialogue box. Highlight the dataset you wish to connect to and click OK. To make this the default dataset (if using multiple datasets) click the Default button while it is selected.

I. To choose a different workgroup server, click the **Add** button from the Select Dataset dialogue box.

J. Type the name of the workgroup server that you wish to connect to. The workgroup server name will become bold and underlined.

K. Click *OK* to return to the Select Dataset dialogue box and choose the dataset you wish to connect to.

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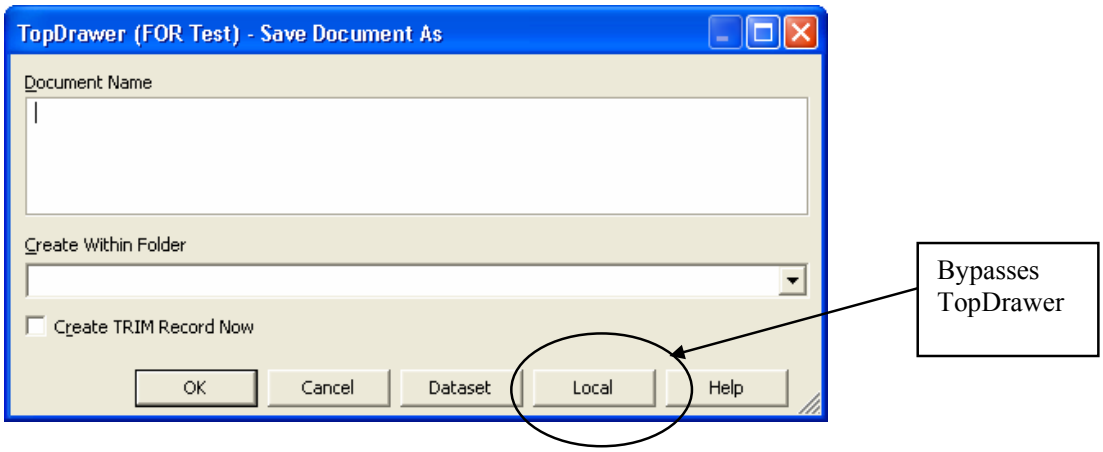
L. Click the **Default** button to make this the default dataset if desired.

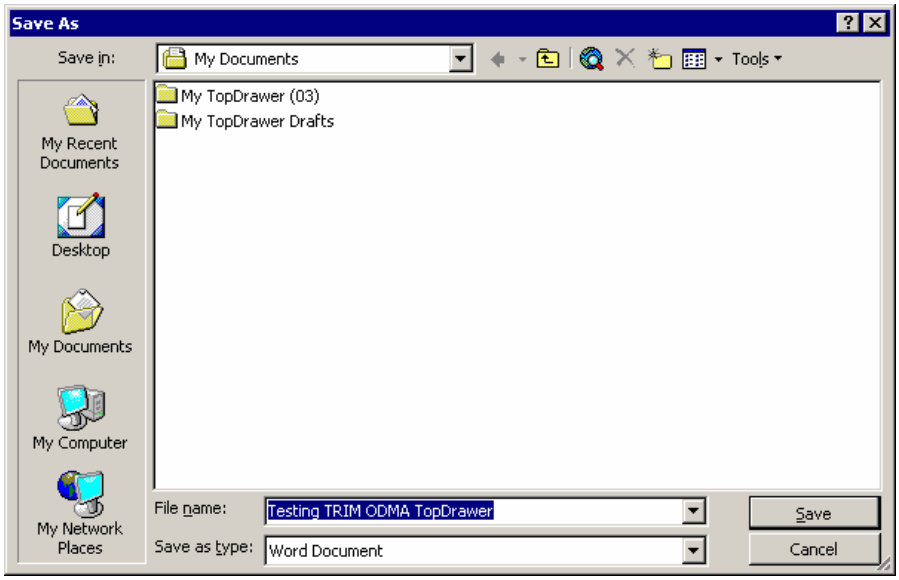
M. Click *OK* to confirm.

Local

A. When TopDrawer is invoked from within an ODMA application such as Word, click the Local button to bypass the TopDrawer interface and save the document to a directory location of your choice.



The **Save As Dialogue Box** will open:



B. Enter a file name and click Save.

Depending on the method of saving selected, the document will be:

Saved to your TopDrawer with the Status of Draft document,

Saved to a Local directory, or

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Created as an official record within TRIM Context.

If you do not wish to save to a local or LAN directory, then,

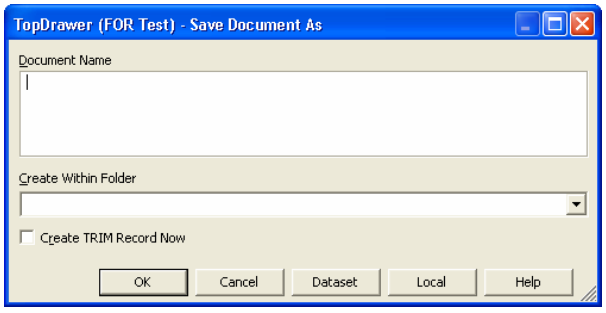
C. Click OK to save the document into TopDrawer.

Try the following exercise to save a draft document into TopDrawer

Exercise 1	**Save a Draft Document into TopDrawer**

This exercise will demonstrate how to save a draft document into TopDrawer.

1. Open Microsoft Word and create the following document.
2. Type: This is my first document.
3. Click **File|Save As** from the menu in Word. (The ODMA TopDrawer will open.)



4. Type: First Document - *Your Name* in the **Document Name** box.
5. Click *OK* to save the document into TopDrawer.
6. Close the document in Word and leave Word open. TopDrawer will also close once the document has been saved.

4.6.2 Opening a Document in TopDrawer

TopDrawer can be accessed from the (ODMA) application's Open function. For example:

A. Select File|Open within Word, TopDrawer will appear.

B. Highlight the document you wish to open and click OK, or,

C. Double-click on a document to open it.

Repeat the above process to open other documents in your TopDrawer.

Once a document is saved in TopDrawer, all subsequent changes to the document will be saved to TopDrawer if you use the Save function. The Save As function will save the document as a new Draft Document in TopDrawer. The document should be given a new filename and it will be treated as a separate document and eventually as a new record when it is checked into TRIM.

Exercises

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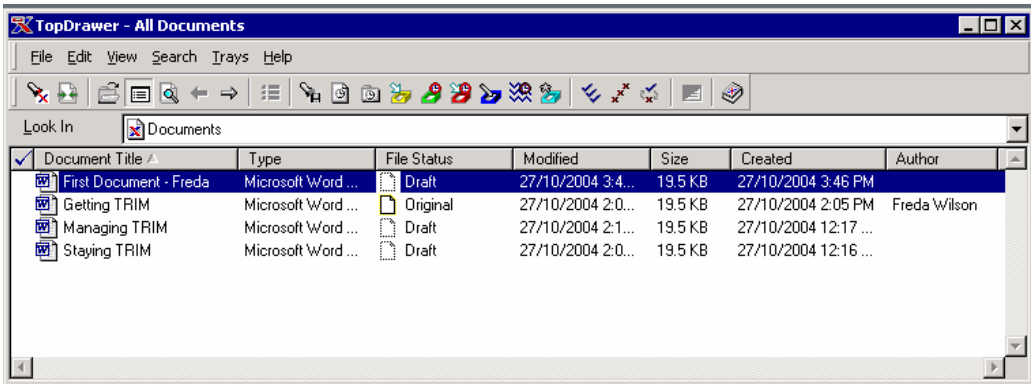
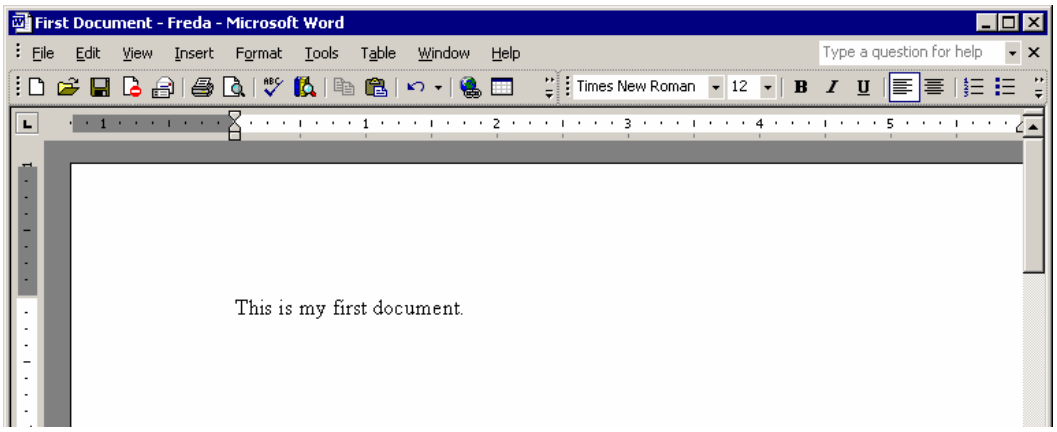
Exercise 1 Opening a Document in TopDrawer

This exercise will demonstrate how to open a document in TopDrawer.

1. Click **File|Open** from the Menu in Microsoft Word. TopDrawer will open and the newly created document will be displayed. The document will be highlighted if this is the only one listed in TopDrawer. Notice that the **File Status** is **Draft**. This means that this document is not an official record in TRIM until it is checked in.



2. Click *OK* to open the highlighted document in Word. The document should look similar to the sreenprint below:



3. Close the document without making any changes and exit from Word.

4.6.3 Checking In a Draft Document

Checking in a Draft document from TopDrawer is a quick and easy process.

A. Open Standalone TopDrawer, highlight the Draft Document you wish to Check In and click the Check In button on the toolbar. A connection will be made to the TRIM database and the following Record Type Dialogue box will appear:

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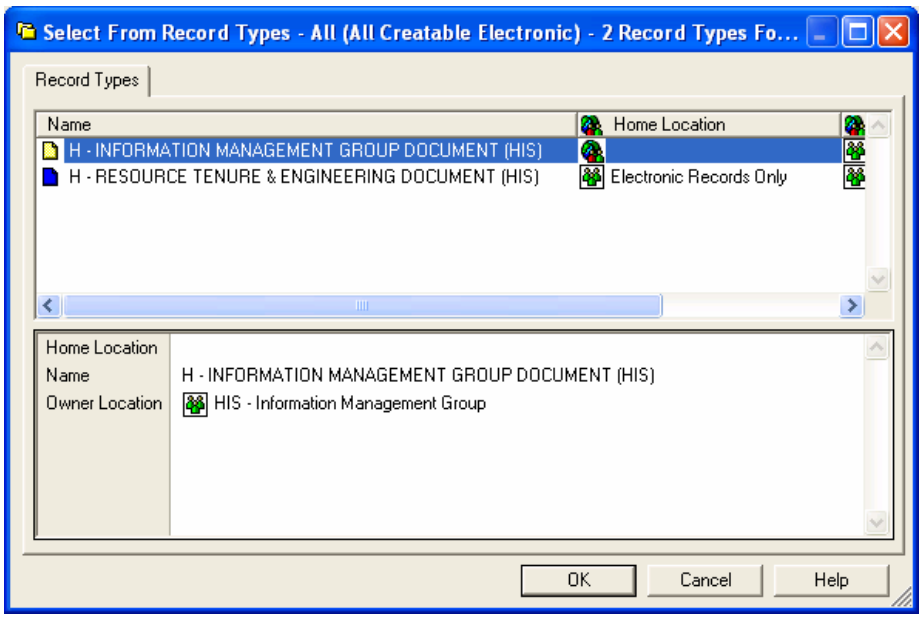
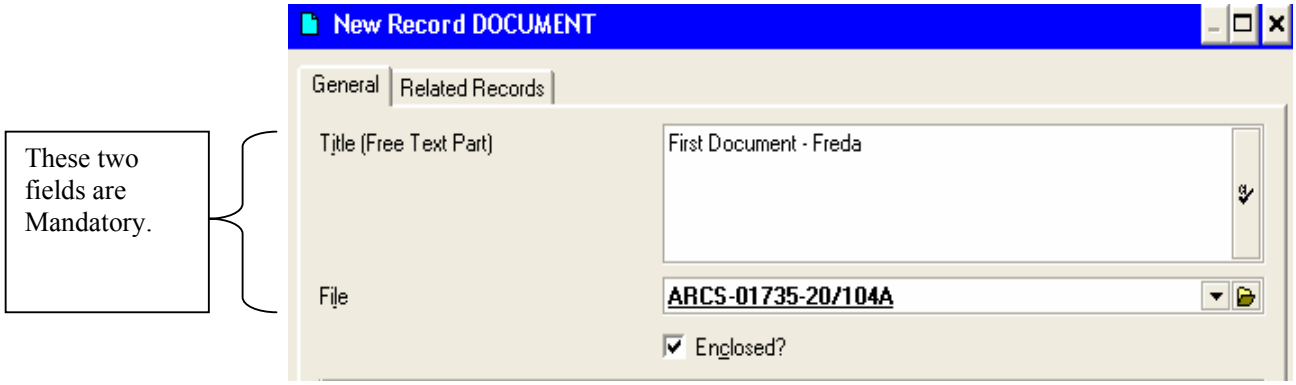


B. Click *OK* to accept the record type upon which the record will be based. The following Record Entry Form will appear:



C. Enter the details on the Record Entry Form and click *OK*.

The document has now been registered in TRIM and will disappear from TopDrawer. Once checked in, updates to this document can only be made by checking the document out of the TRIM repository to TopDrawer, a Windows Folder Queue or to a Local/LAN directory.

Exercises

Exercise 1	**Check In a Draft Document from TopDrawer**

This exercise will demonstrate how to **Check In** a draft document from TopDrawer.

1. Make sure you have closed out of Word.

2. Launch TopDrawer

from the Desktop or Quick Launch Bar.

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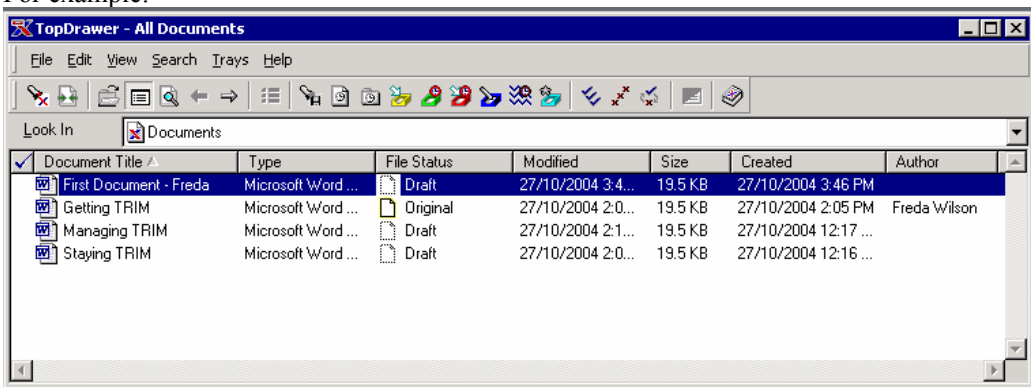
3. Highlight the newly created document, **First Document - Your Name**.

   For example:



4. Click the **Check In** button on the toolbar in TopDrawer.
5. Click *OK* to create a new Document record type and open the New Record Data Entry Form.
6. The Free Text Title will be populated with the filename that you saved the document under. This title can be edited if you want to change the name to something more descriptive or meaningful.
7. You now need to select a folder into which this document will be filed. Click the KwikSelect folder button to search for the container (folder) where this document will be placed. Choose a folder from the list in the **My Containers** tray and click *OK*.
8. Click *OK* to create the record in TRIM.
9. The document will be removed from TopDrawer once it has been checked into TRIM.

4.6.4 Browse Classifications

TRIM provides a Classifications button that makes it easy to search for a specific classification when checking in a document to TRIM from TopDrawer. You may need to look for a specific folder that is not in the 'My Containers' tray when choosing a container for a document. The Classifications List will show any records that have been classified against a specific classification.

A. Click the KwikSelect folder on the Document Record Entry Form:
   You will see the following screen if there are no folders in the 'My Containers' tray, in which case you will need to search for the folder.

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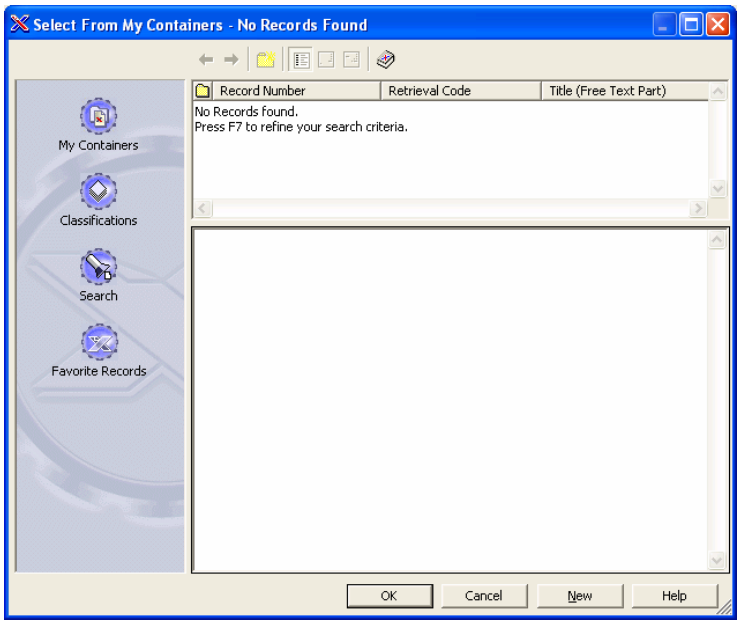
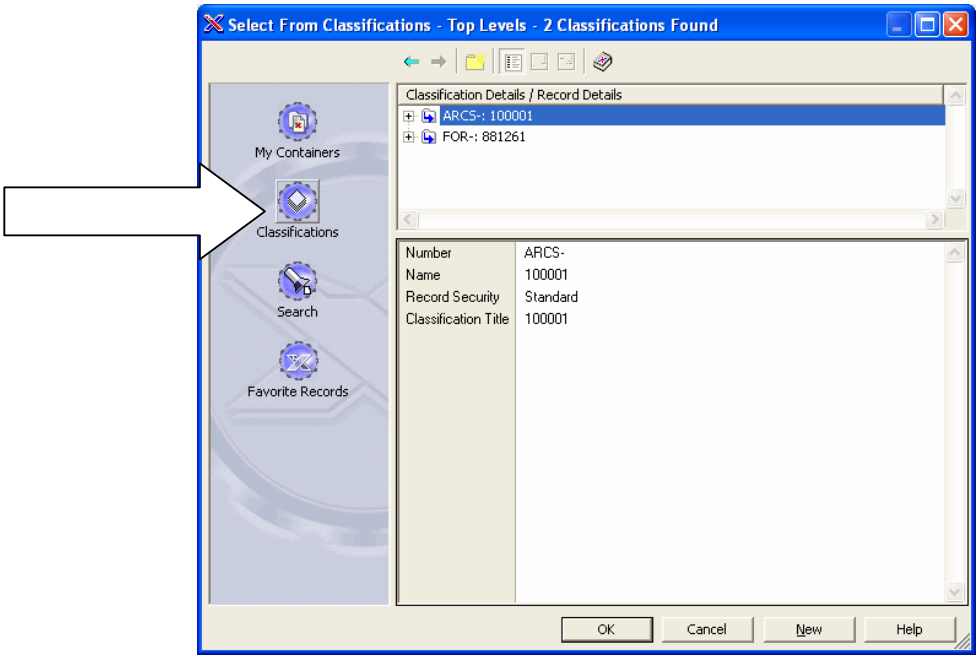


B. Press **[F7]** to open the 'Select from Classifications' dialogue box.

C. Click the Classifications button on the left bar to list the classifications on the screen.



D. You can now search the classifications list for an appropriate container in which to file the document or, request that a folder be created for you.

4.6.5 Checking out a Document to TopDrawer

In order to check out a document from TRIM to TopDrawer, you must first find the document in TRIM. To do this,

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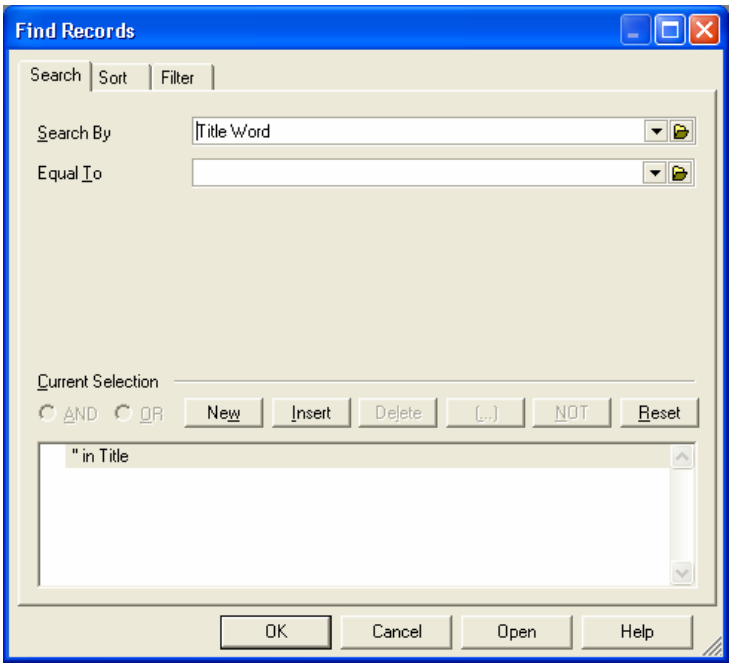
A. Click the Find Records button on the toolbar in TopDrawer

A connection will be made to TRIM and a dialogue box similar to the following will appear:



Note: The Find Records search screen will be based on the last type of search performed. In the example above, a Title Word search was last invoked. The search method can be changed to reflect the type of search to be performed.

B. Select the search method you wish to use.

C. Insert the appropriate **Search Value** and click *OK* to begin the search.

D. The search results screen will display all records that match your search criteria. If the search does not locate the document you were searching, or the result list is too long, click the **Refine** button or press [**F7**] to refine the search. For example:

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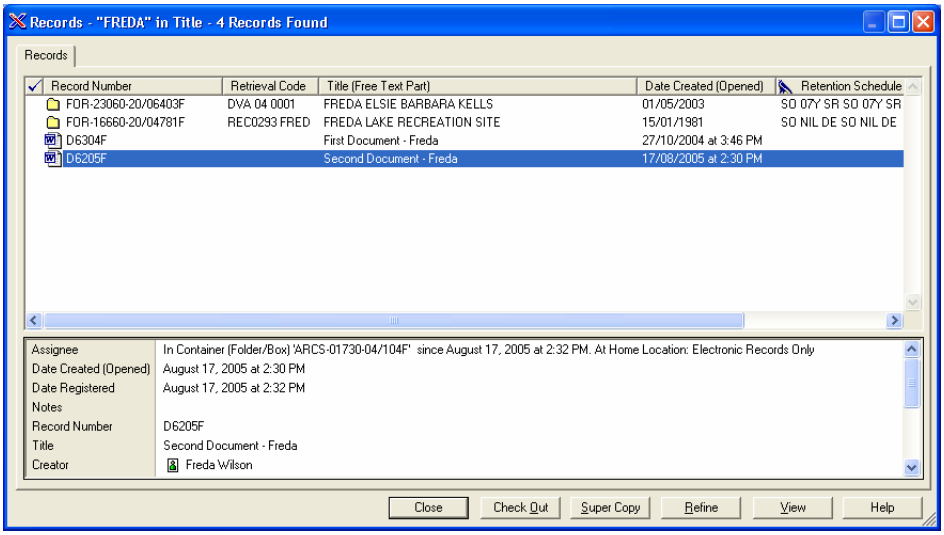

E. Once the results are displayed, highlight the record or tag a group of records that need to be checked out. The **View** button will allow you to view a document to ensure that it is the correct one. The TRIM Viewer function will only display the currently highlighted record.

F. Choose either **Check Out** or, **Super Copy**.

Check Out

This option allows you to check the document out of TRIM and into TopDrawer and will appear as an Original Document that can be opened and edited. When it is checked back into TRIM, it will be checked in under the same Record Number.

Super Copy

This option will allow you to make a copy of the electronic document. A copy of document is added to TopDrawer with the Status of Draft Document. This copy can then be modified and registered in TRIM only as a new record.

G. Click **Close** and the document will be added to your TopDrawer.

> ***Note:*** A super copy of a record cannot be checked in under the previous record number. TRIM will only permit it to be checked in as a new record.
>
> Only the current revision of a document can be checked out and updated. A document can only be Checked Out by one person at a time. Other users will still have access to the current revision of the document in the Document Store (TRIM repository), however, they cannot view the changes to the document in your TopDrawer, until it is checked back into TRIM.

A document cannot be checked out to TopDrawer if:

It is not an electronic document.

The document is already Checked Out by another user.

The Document is marked as Final.

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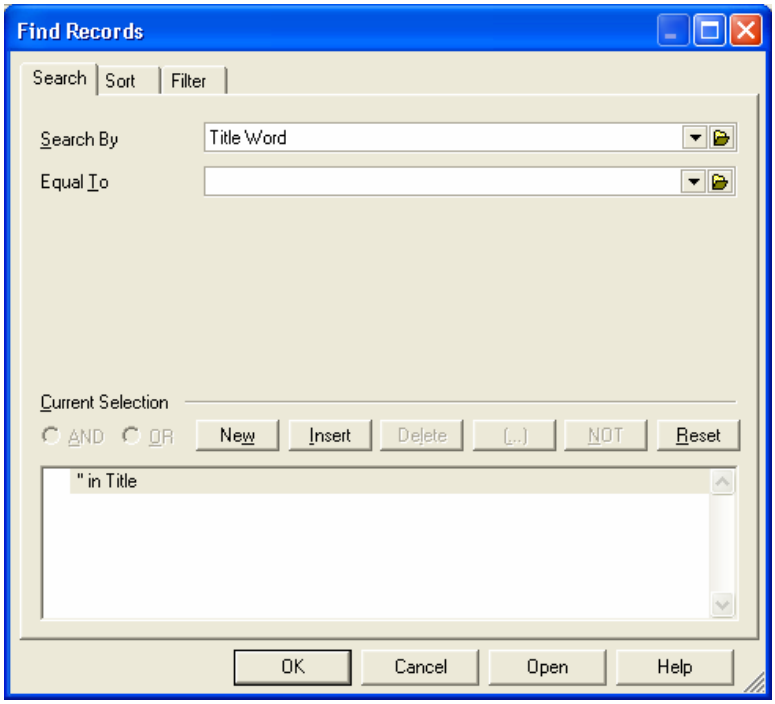
- Access Control has been placed on the document and you do not have rights to view the metadata or the document or modify the document.

Exercises

Exercise 1 Check Out a Document to TopDrawer

This exercise will demonstrate how to **Check Out** a document to TopDrawer.

1. Launch TopDrawer from the Desktop or Quick Launch Bar.
2. Click the Find Records button on the toolbar in TopDrawer to search for the record just checked into TRIM.
3. Choose **Title Word** as the Search Method. If a different search method appears, click the KwikSelect button and choose **Title Word** from the **Word Searches** category.



4. Type First in the **Equal To** field.
5. Click *OK* to search for the newly created record in TRIM. The search results screen will display those records matching the search criteria. In this case, it will display all records containing your first name in the Title.

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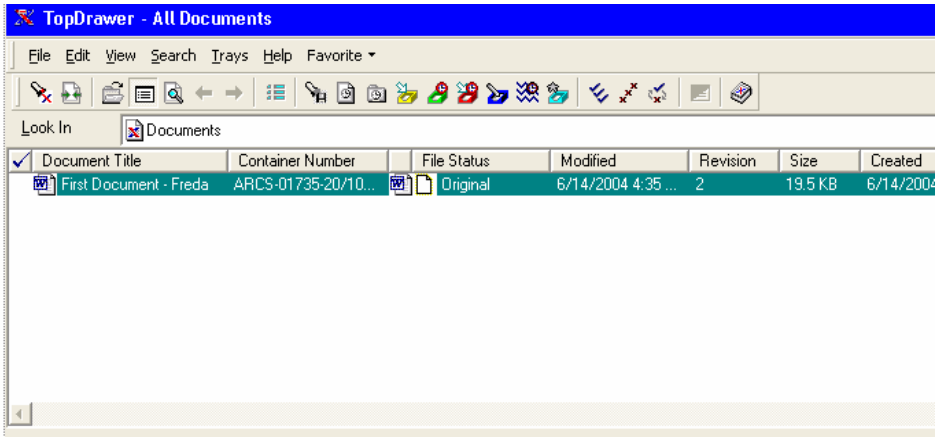
6. Highlight the document you created and click the **Check Out** button at the bottom of the search results screen. You will see a dialogue box advising that the document attached to this record has been checked out to TopDrawer.
7. Click *OK* to close this message.
8. Click Close to exit from the search results screen.
9. Switch to TopDrawer to see the document just checked out.
   Notice that the **File Status** is **Original**.



4.6.6 Modify an Original Document after Check Out to TopDrawer

Once you have checked out a document from TRIM to TopDrawer you can make changes to it and either save it again to TopDrawer for further editing, or check it back into TRIM.

A. Open TopDrawer from the desktop.

B. Highlight the document you wish to edit and double-click to open the document in Word.

C. Make the required changes to the document.

D. Save the document and close out of Word.

E. Switch to TopDrawer. Within a few seconds you should see the document in TopDrawer with a **File Status** of **Modified**.

F. You can now check this document back into TRIM or leave it in TopDrawer for further editing.

Exercises

Exercise 1	**Modify an Original Document**

This exercise will demonstrate how to modify an original document that has been checked out to TopDrawer.

1. Open TopDrawer from the desktop.

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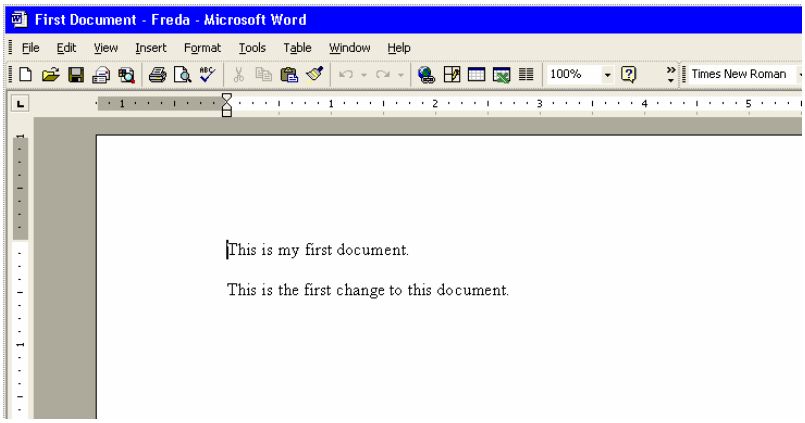
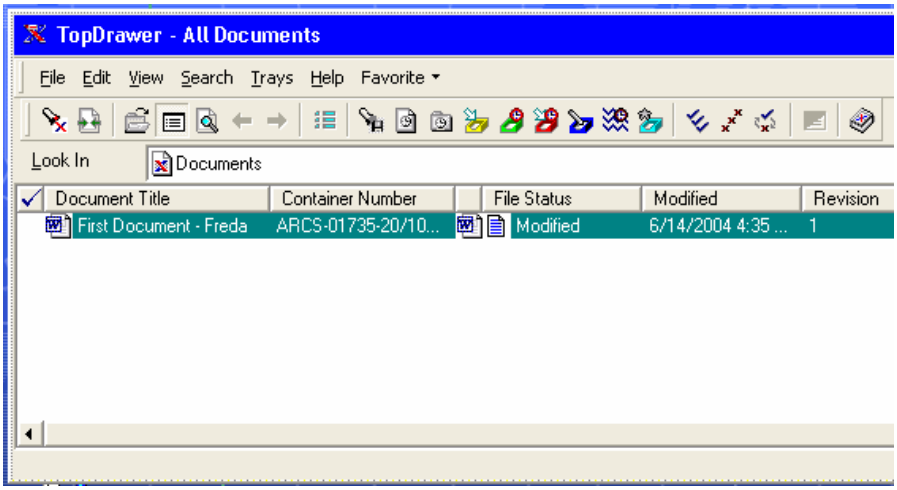
2. Highlight the **First Document - Your Name** and double-click to open the document in Word.
3. Go to a new line in the document and type: This is the first change to my document.



4. Save the document and close out of Word.
5. Switch to TopDrawer. Within a few seconds you should see the document in TopDrawer with a **File Status** of **Modified**.



The document can now be checked back into TRIM.

4.6.7 Checking In a Modified TRIM Document

Again, TRIM makes this an easy process when using TopDrawer.

A. From TopDrawer, select the **Modified** document you wish to Check In and click the **Check In** button on the toolbar.

B. A connection will be made to TRIM and the Check In Dialogue box will appear:

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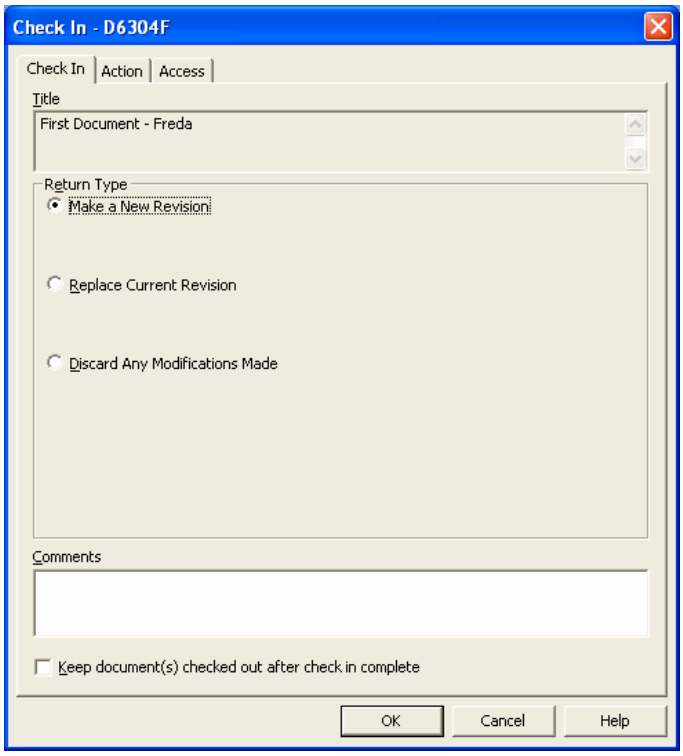
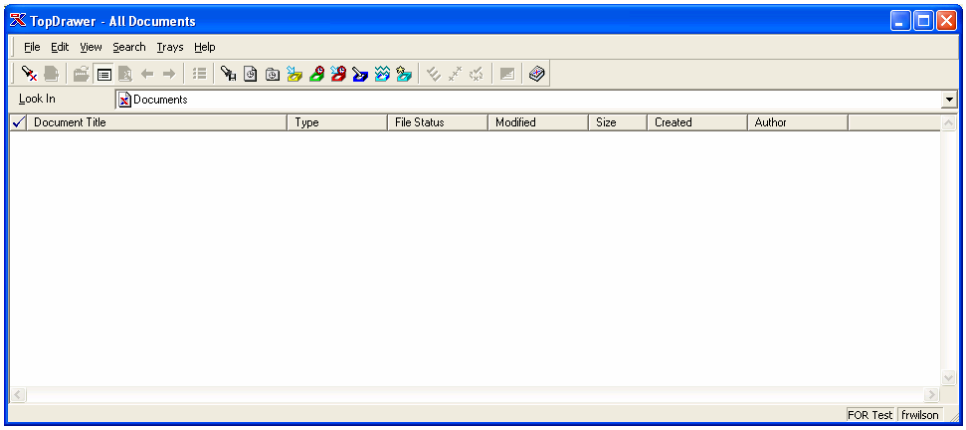


1. Select the default of Make a New Revision and enter the appropriate information on each tab and click OK. The Document is now checked back into TRIM and the document is removed from TopDrawer.



Make a New Revision

This option will return your new revision of the document (the changes you made) to the Electronic Store making it the current revision, whilst retaining any previous revisions that exist.

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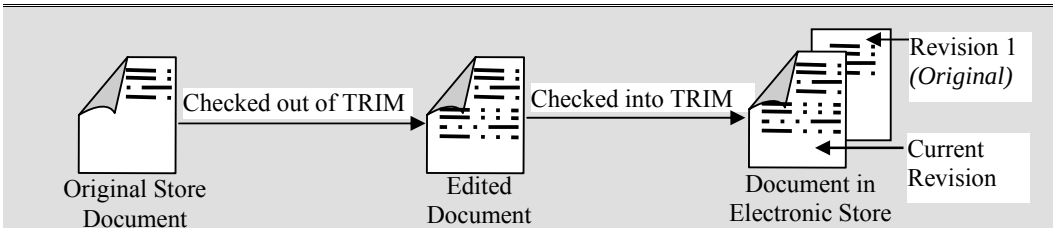

Exercises

Exercise 1	Checking In a Modified Document

This exercise will demonstrate how to modify an original document that has been checked out to TopDrawer.

1. You should be in TopDrawer.
2. Highlight the **First Document - Your Name** and click the **Check In** button on the toolbar.
3. Select the default of **Make a New Revision.**
4. Add any appropriate information in the Comments field.
5. Click *OK* to check in the document to TRIM.
6. The document will be deleted from TopDrawer.

4.7 Searching for a Document Checked into TRIM

TRIM provides a host of ways to search for records. We will look at a couple of those methods and later in the course you will learn more about TRIM's search capabilities.

You can select the Search Method via the KwikSelect button 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. The '**Equal To**' field is where you enter the corresponding criteria that the search must meet. Once you have selected the Search Method, TRIM will display the appropriate search value options.

To search for a document that has been checked into TRIM follow the steps below:

You should be in TopDrawer.

A. Click the Find button on the toolbar to search for the record you wish to check out.

B. Choose the search method such as Title Word by clicking the KwikSelect button in the Search By field and choosing Title Word from the Word Searches category.

   Each time you choose a different type of search TRIM remembers and adds it to the Drop-down▼ list to be used for future searches. Initially this field is blank until you conduct the first search.

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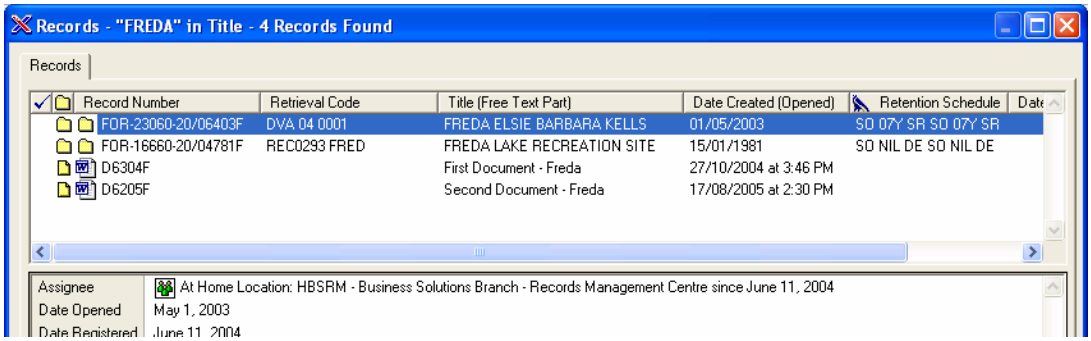
C. Enter the search criteria in the Equal To field.

D. Click OK to begin the search.

The Search Results screen will return all records that meet the search criteria and which you have access to.



E. Locate the record for which you were searching.

You could also have searched for records created by you, in which case you would only see those records that you had registered in TRIM. You will learn how to do this later in the Chapter on Searches.

F. Click the at the top right of the window to close the Search Results screen.

Exercises

Exercise 1	**Searching for a Document Checked into TRIM**

This exercise will demonstrate how to search for a document that has been checked into TRIM.

1. You should be in TopDrawer.
2. Click the Find button on the toolbar to search for the **First Document - Your Name**.
3. Select **Title Word** as the type of search.
4. Type: First in the **Equal To** field as the search criteria.
5. Click *OK* to begin the search.
6. Locate the record that you checked into TRIM**.**
7. Close the search results window.

Now you will learn how to view the revision that you made to that record.

4.7.1 Viewing a Revision(s) to a Document in TRIM

TRIM keeps track of all saved revisions to a document and these can be viewed through the properties of the record in TRIM.

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To view a revision to a document you must first search for the record in TRIM.

You should be in TopDrawer.

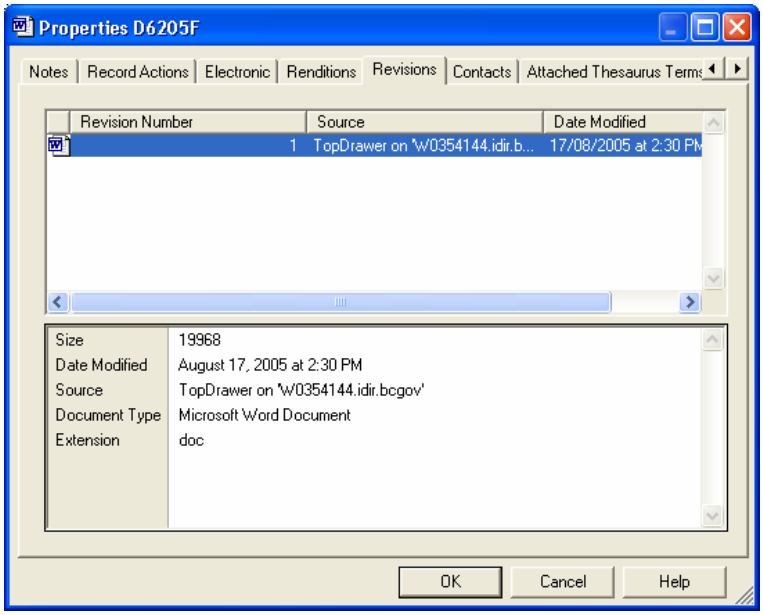
A. Click the Find button on the toolbar to search for the record you wish to view.

B. Choose the search method by which you wish to search for the record.

C. Highlight the record in the search results screen and right-click.

D. Choose **Properties** from the shortcut menu.

E. Click on the **Revisions Tab** to bring it to the front. This tab is only available when a revision(s) has been made to a document.



As more revisions are made to a document and saved into TRIM they will be listed in the order in which they were made.

F. Right-click on the revision you wish to view and choose View from the shortcut menu. The document will display a read only version of the revision.

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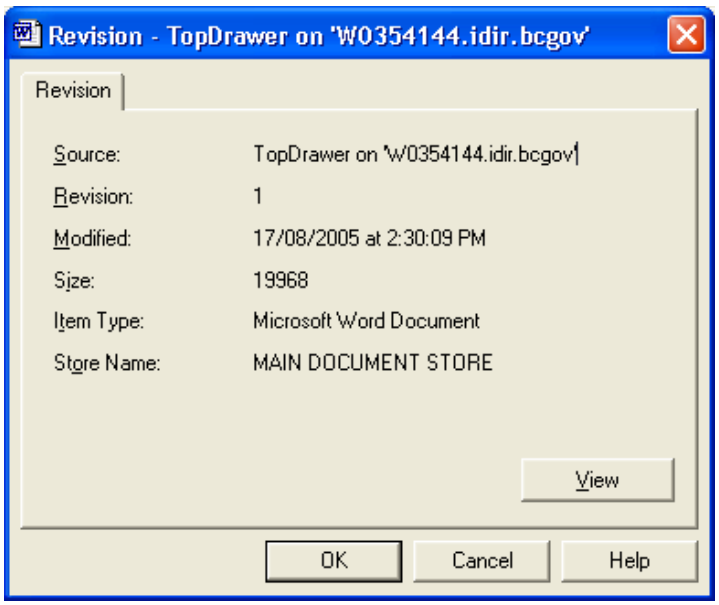
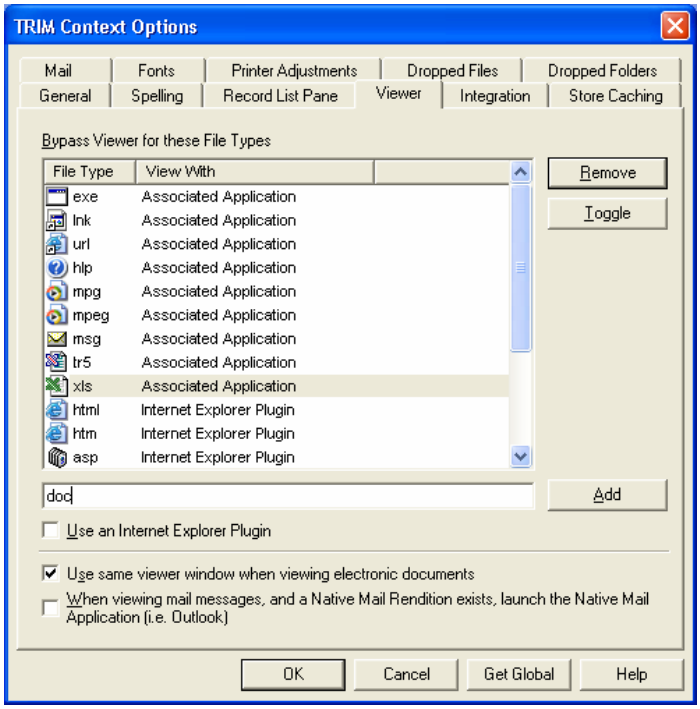


G. Exit from the document and click Cancel to close the Revision Dialogue Box.

H. Click **Cancel** to close out of the record Properties.

Note: If the **User Configuration>Options** have not been set to bypass the Viewer, then the revision will open in the TRIM Viewer rather than read only in Word.

A. These settings can be set through TopDrawer from the Menu File|Preferences>Options then click on the Viewer tab.



B. Type: doc in the Bypass Viewer for this File Type and click the Add button.

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Exercises

Exercise 1	Viewing a Revision to a Document in TRIM

This exercise will demonstrate how to modify an original document that has been checked out to TopDrawer.

1. You should be in TopDrawer.
2. Click the Find button on the toolbar to search for the **First Document - Your Name**. You can use the **Title Word** search or, **Date Registered** as the type of search. This is found by expanding the **Dates** Search Method.
3. Highlight the record in the search results screen and right-click**.**
4. Choose **Properties** from the shortcut menu.
5. Click on the **Revisions Tab** to bring it to the front. This tab is only available when a revision(s) has been made to a document.
6. Right-click on the revision you wish to view and choose **View** from the shortcut menu.
7. Close the TRIM Viewer to return to the Revisions Tab.
8. Click Cancel to close out of the record Properties.

4.8 Document Revisions in TRIM

The following information and diagrams show how TRIM handles document revisions.

4.8.1 Check In Tab

The Check In Tab presents different options when checking in a revised document to TRIM.

Return Type

This Chapter of the Check In Tab allows you to choose what you want to happen with your revised document when it is returned to the TRIM store. You can select from:

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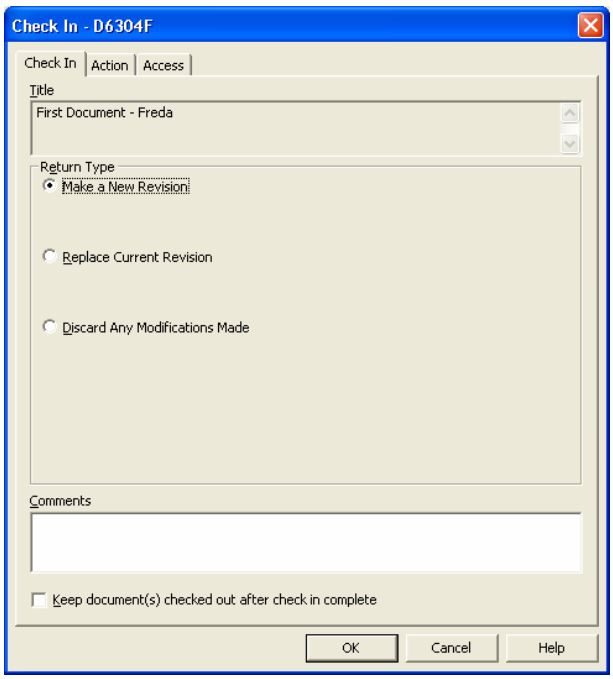
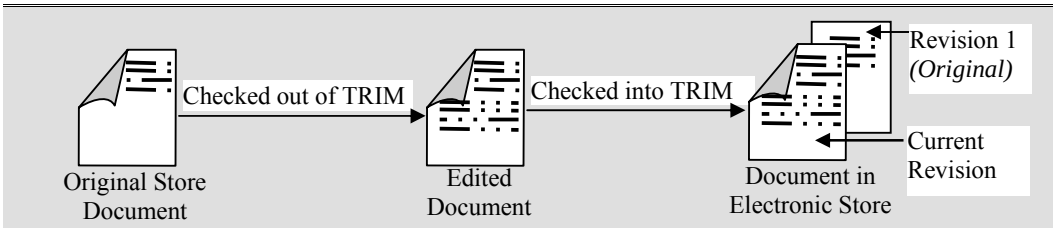


The following diagram shows how revisions are handled when checking in documents to TRIM.

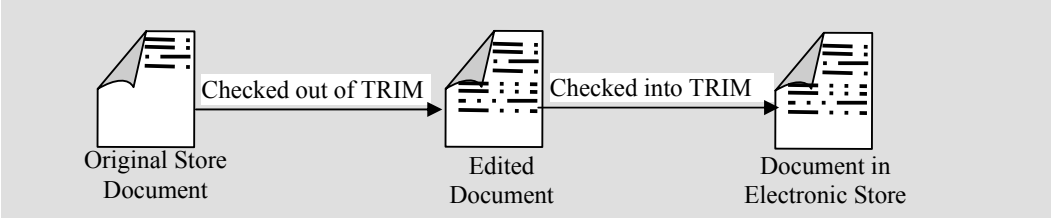
Make a New Revision

This option will return your new revision of the document (the changes you made) to the Electronic Store making it the current revision, whilst retaining any previous revisions that exist.



Replace Current Revision

This option will return your revision of the document (the changes you made) to the Electronic Store and over-write the current revision in the Electronic Store.



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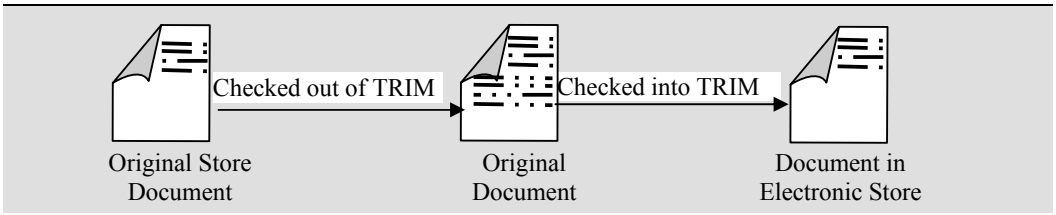
Discard any Modification Made (Document will not be modified)

This option will return the document to the Electronic Store, discarding any changes you may have made.



Note: The System Administrator may disable these options on Record Types.

Comments

This option allows you to make notes about any changes that you have made. Information typed into the comments Chapter will be appended to the record's Notes Field.

Keep document(s) checked out after check in complete

This option will check the document into TRIM, and then check it back out to TopDrawer, so you can continue to make edits.

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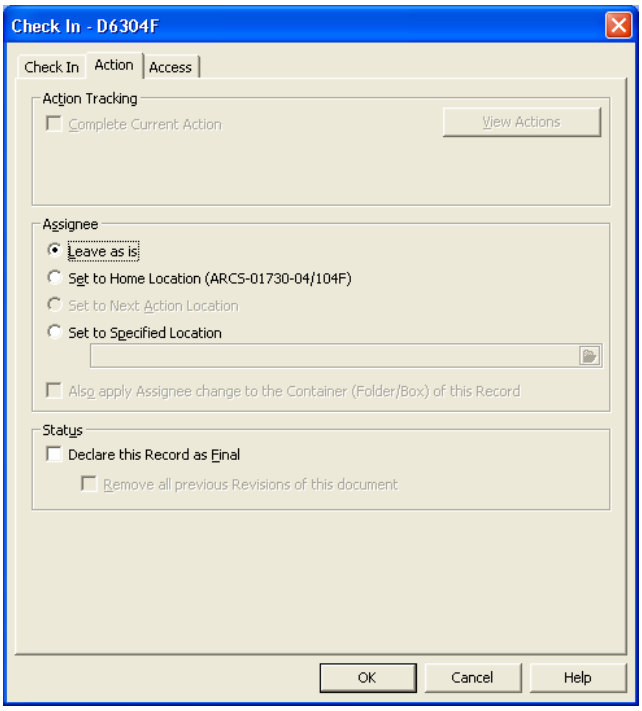
4.8.2 Action Tab

The Action tab allows you to modify the following information on the document(s) being checked into TRIM.



Action Tracking (Currently not being used by Ministry of Forests)

This field will only be active if you have a current action outstanding on the Document being checked in.

- ***Complete Current Action***

Check this box to complete or sign off the Current Action.

- ***View Actions***

Click on the **View Actions** button if you wish to see the details of the Action attached to the record.

Assignee

The Chapter of the Action Tab gives the user the opportunity to change the Assignee of the record when it is checked in.

- ***Leave as is***

Select this option if the Assignee does not need changing.

- ***Set to Home Location***

Select this option if the record is to be assigned to its Home Location.

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- ***Set to Next Action Location***

This option would assign the record to the Location responsible for the next Action. (This is part of the Action Tracking feature in TRIM.)

- ***Set to Specified Location***

Select this option if the record needs to be assigned to a different Location to any of the above options.

- ***Also apply Assignee change to the Container of this Record***

This option would be selected if the record using the Action is in a Container and the Container is being moved to the Assignee.

Status

The Status allows a Document to be made Final. This will prevent anyone from checking the document out and making further changes.

- ***Declare this Record as Final***

Check this box to make the record Final. A final document cannot be checked out of TRIM to make any changes. Only a Super Copy of a Final document can be checked out to TopDrawer. The Super Copy can only be checked back into TRIM as a New Record.

- ***Remove all previous revisions of this document***

When a document is made Final you can choose to delete all previous revisions from the document.

Note: **This decision would be based on internal document management policies and procedures that should be established.**

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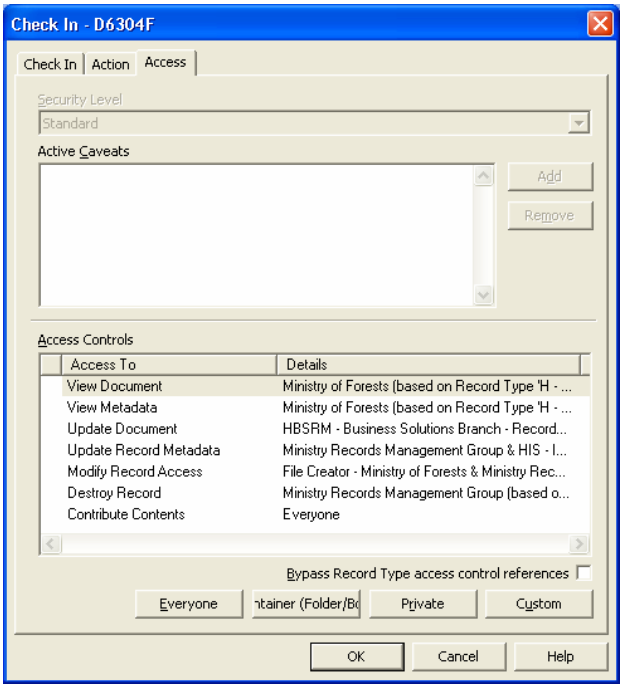
4.8.3 Access Tab

The Access tab allows you to modify the current Security Level, add Caveats or apply Access Controls to the document.

Note: *A document that has undergone changes may also need to have its Security access permissions modified.*



Security Level

Use the dropdown list to select the correct Security Level if the record requires a different Security Level.

- ***Active Caveats***

  Select from the available Caveats if the record needs to have additional Caveats applied or alternatively remove Caveats if required.

Access Controls

- ***View Document***

  This Access Control setting allows you to determine who can view (see) the electronic document that is attached to a record in TRIM.

- ***View Metadata***

  This Access Control setting allows you to determine who can see the Metadata (TRIM information) for the record.

- ***Update Document***

  This option allows you to determine who will be able to check out the document.

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- ***Update Record Metadata***

  This option allows you to determine who can modify the Metadata (TRIM information) on this record.

- ***Modify Record Access***

  This Access Control setting allows you to determine who can modify the Access Controls placed on the record.

- ***Destroy Record***

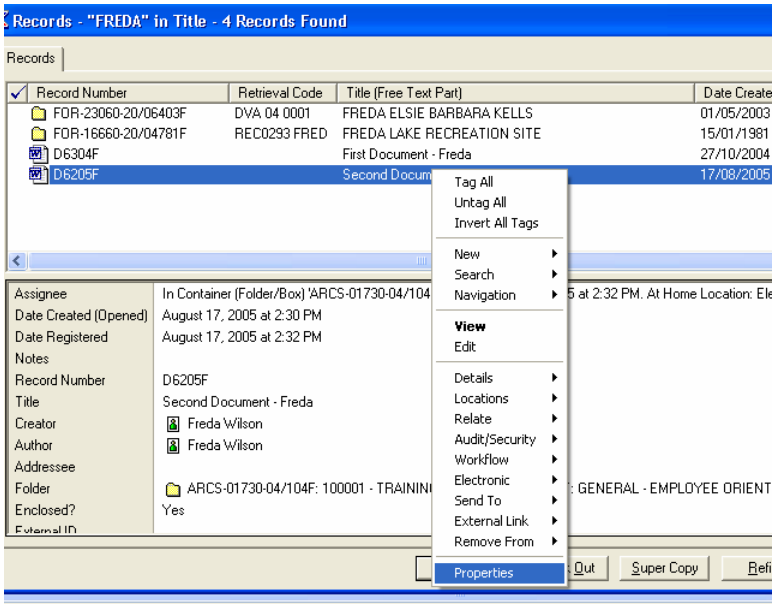
  This option allows you to determine who can delete this record, and its electronic attachment, from TRIM.

4.8.4 Extracting a Revision

A Revision cannot be checked out of TRIM, however a copy can be extracted to a local or network drive. To do this,

A. Find and select the record you wish to extract a revision from.

Right-click and select Properties.



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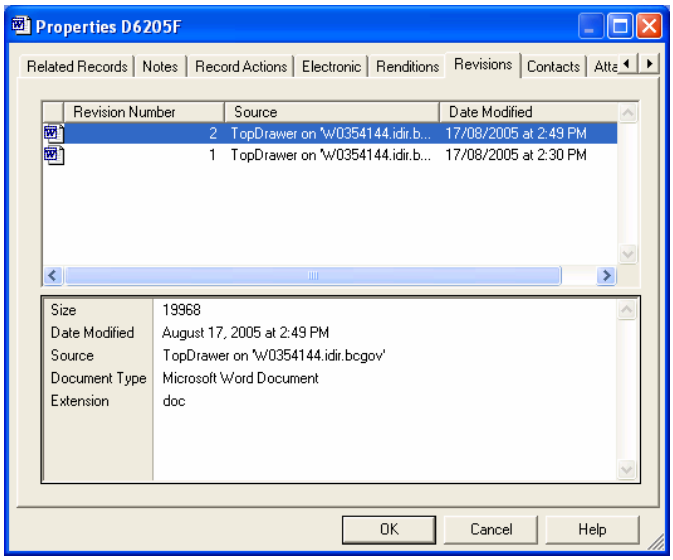
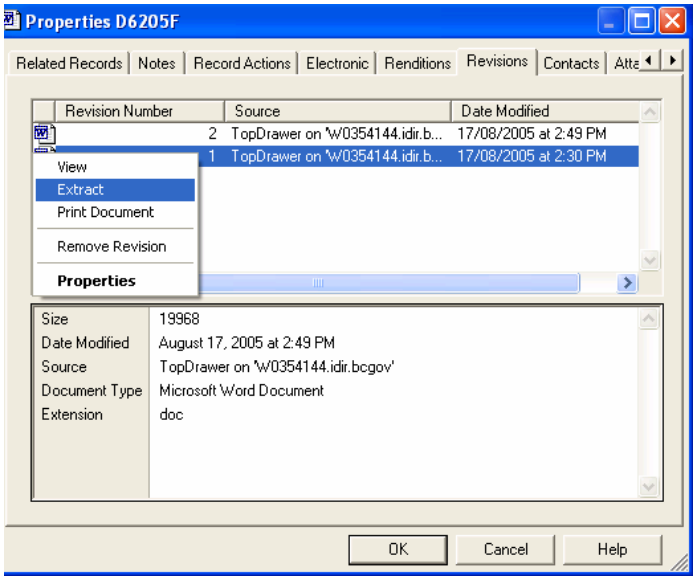
B. Click on the Revision tab. All revisions attached to the record will be listed.



C. Highlight the revision, right-click and select Extract.



The following dialogue box will appear and a default path will be displayed that points to the user's default directory, usually My Documents on either a local or LAN drive:

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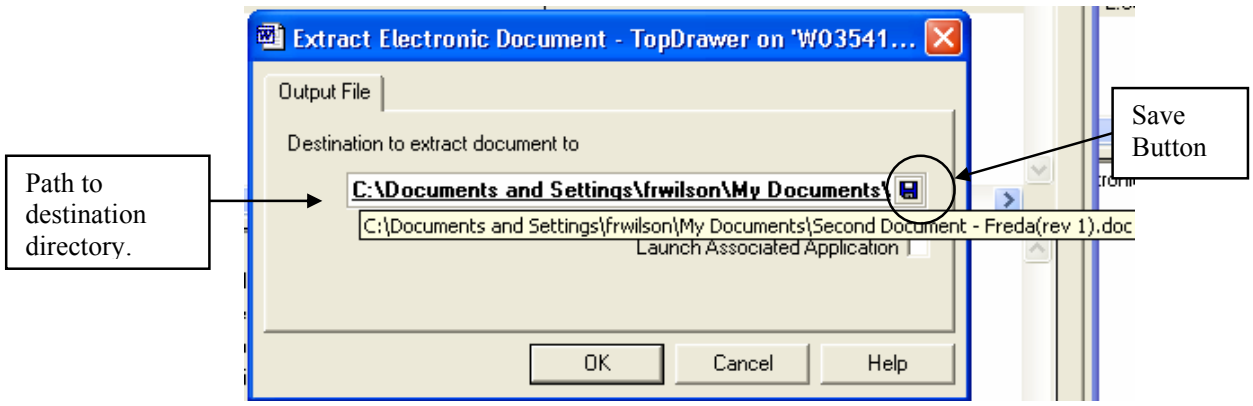
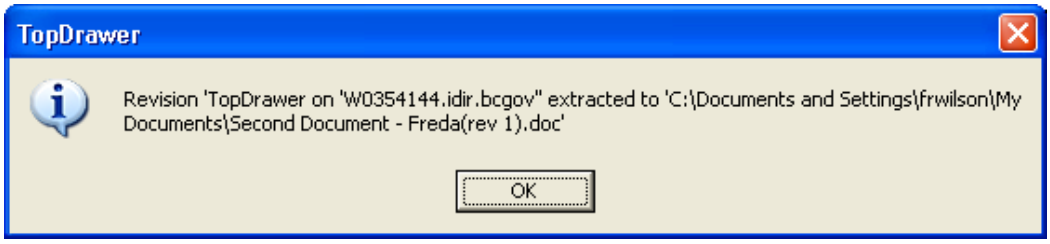


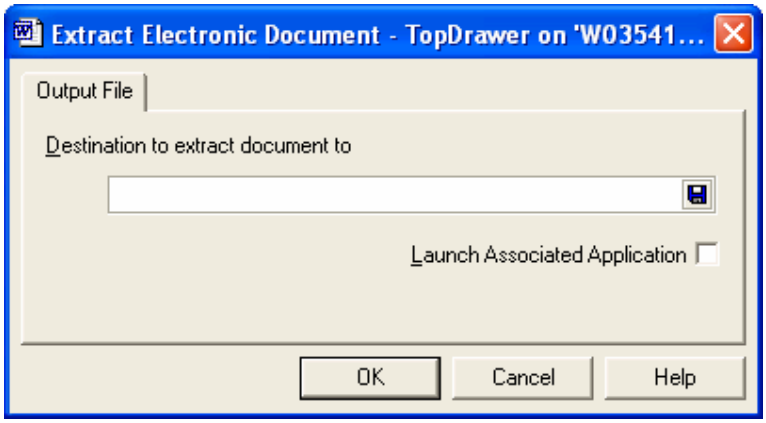
D. The Launch Application Check Box (if checked) will open the authoring application and the document.

E. Click *OK* to extract the document. The following dialogue box shows the document has been extracted to My Documents:



To extract the revision to TopDrawer:

F. Highlight the path that appears in the 'Destination to extract document to' field and press the Delete key on the keyboard to clear this entry.



G. Click OK to extract the revision to TopDrawer. You will see a dialogue box similar to the following:

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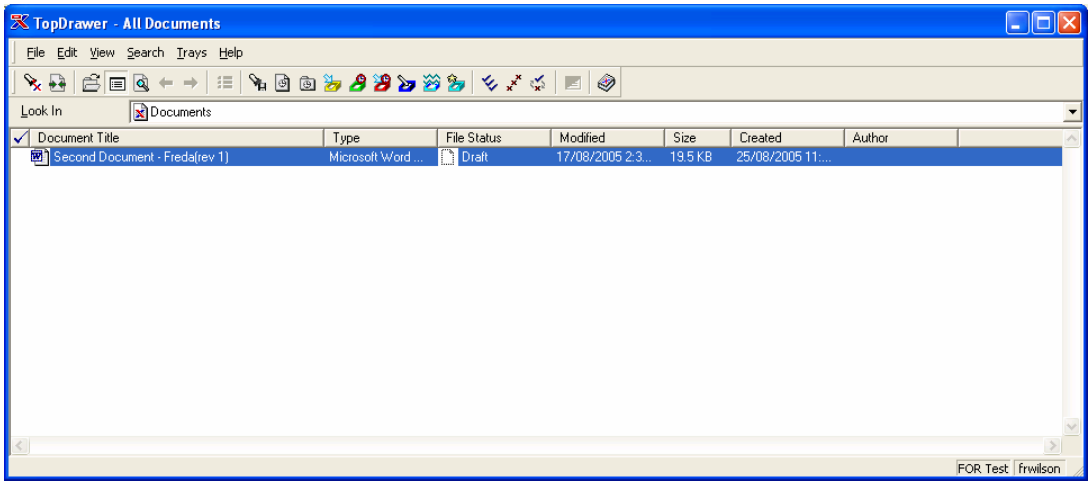
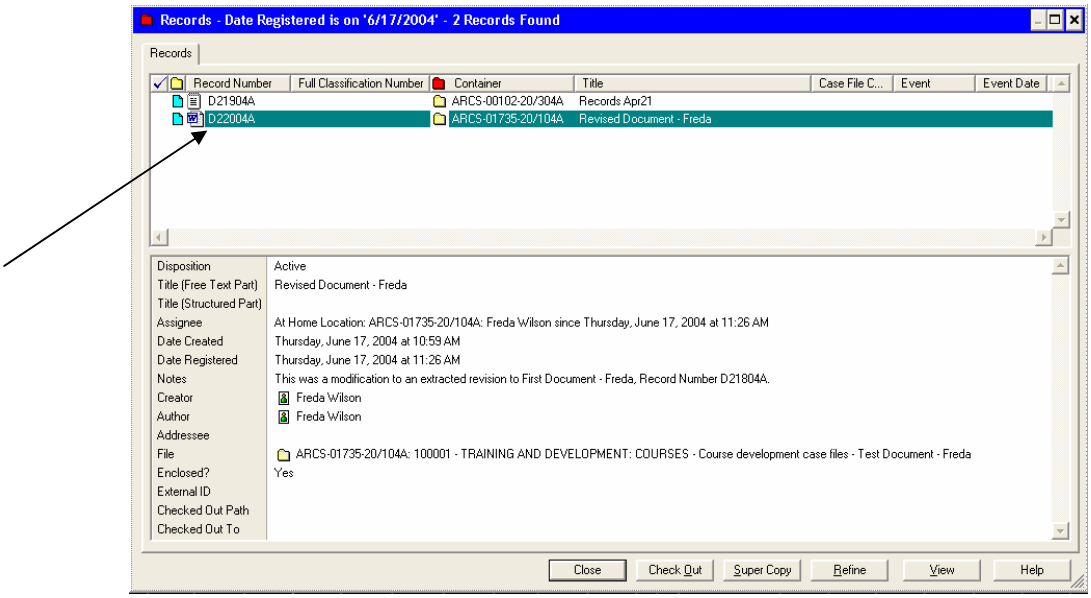
H. In the below example the document has been extracted to TopDrawer.



You can revise the document and check it into TRIM, but only as a new record. The original revision still exists in the record from where it was extracted. The screenprint below shows the new record created from the modified revision.



4.8.5 Printing a Revision

A Revision can be printed as follows:

1. Find and select the record in which you wish to print a revision from.

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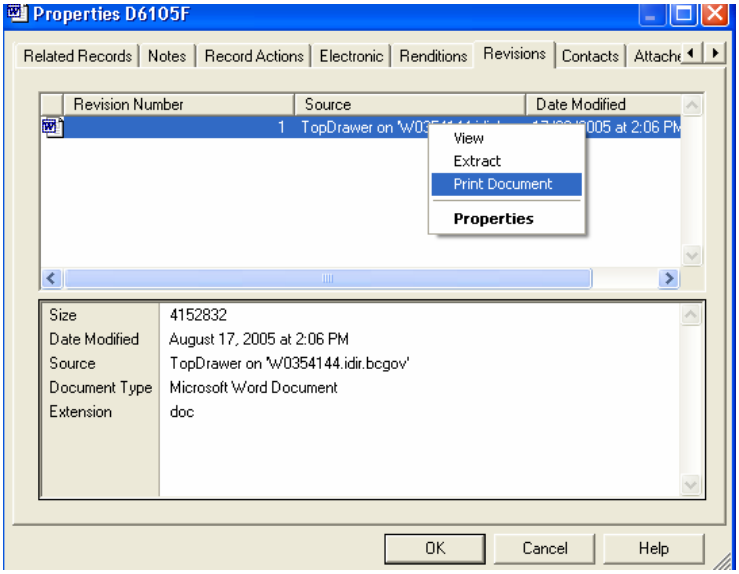
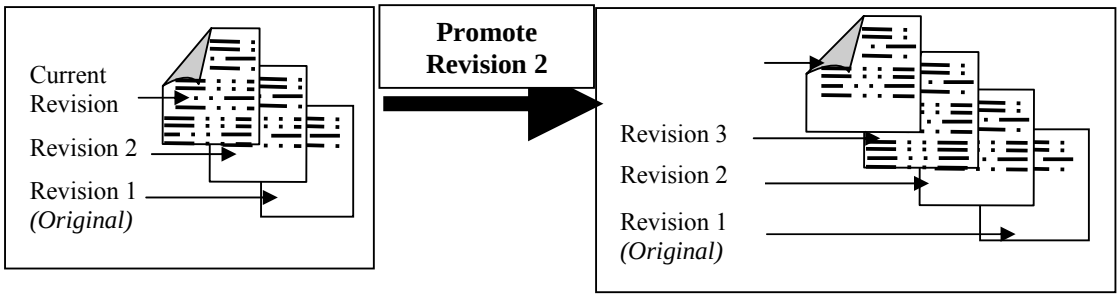
2. Right-click and select Properties.
3. Click on the Revisions tab. All revisions attached to the record will be listed.
4. Highlight the revision, right-click and select Print Document.



4.8.6 Promoting a Revision

A Revision can be promoted to become the current Revision of the document. The diagram below shows what happens when a revision is promoted.

Note: An End User can only promote revisions to document records that they have created. An End User does not have permission to promote a revision to a record that they did not create. This can be done by an Information Worker, Information Manager or Administrator.



In the above diagram, Revision Two has been selected for Promotion. TRIM takes a copy of Revision Two and makes it the current revision. The previous current Revision has been demoted to Revision Three. There are now a total of four revisions of this document.

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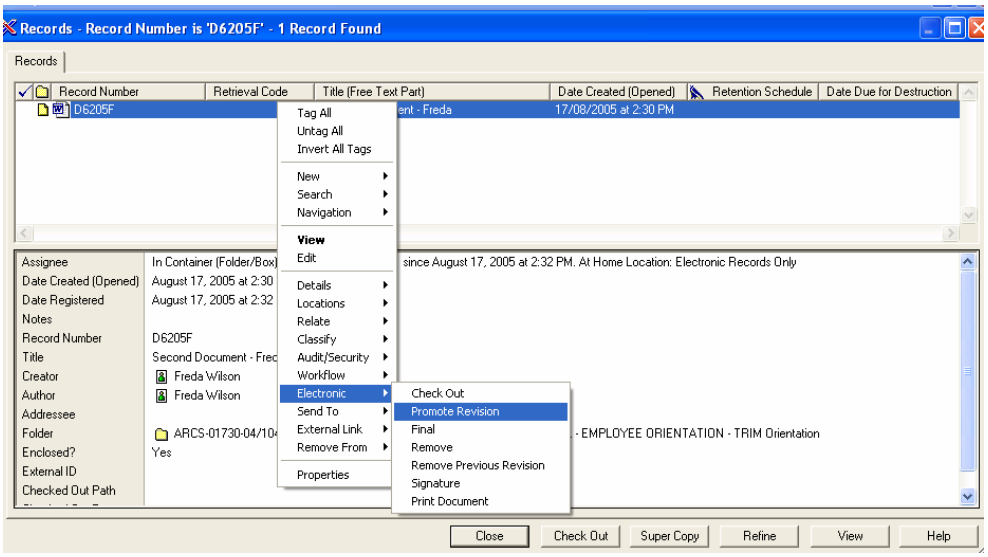
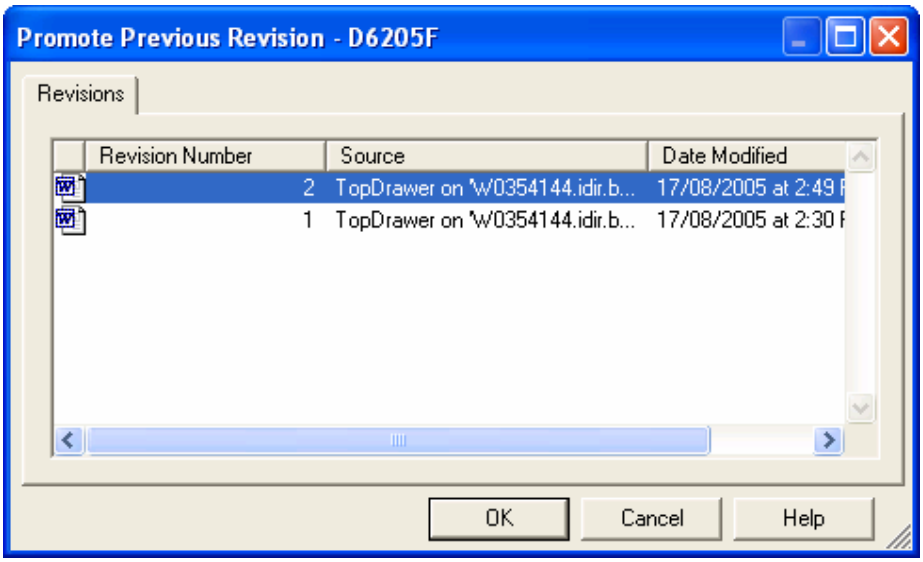
To promote a revision

A. Search for the record, which contains the Revision you wish to promote.
B. In the Search Results window, right-click on the record and select **Electronic** > **Promote Revision**. The Promote Previous Revision Dialogue Box will be displayed.



C. Select the Revision you wish to promote and click *OK*.



D. Double-click the record to view the current version of the document.

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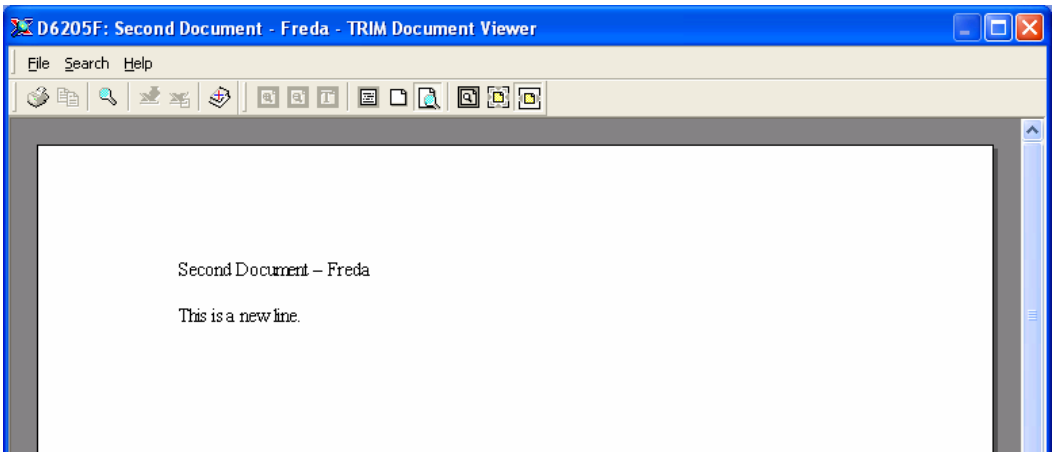
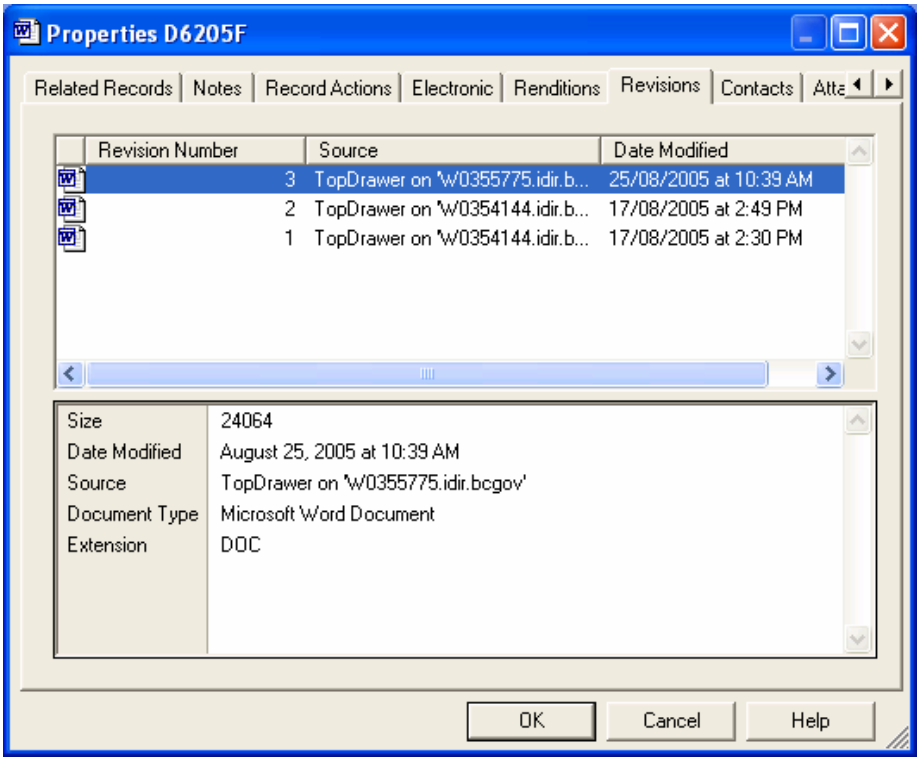


E. Close the document from Word.
F. Select the Revisions tab in the Properties of the document to see that another revision has been added.



G. Click *OK* to close out of the record properties screen.

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4.9 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 are the different types of TopDrawer available?

   _____

   _____

   _____

2. How do you set the Default Dataset in TopDrawer?

   _____

   _____

3. Explain the difference in File Status of Draft, Modified and Original documents in TopDrawer.

   _____

   _____

   _____

4. How does the ODMA TopDrawer differ from the Standalone version?

   _____

   _____

   _____

5. What is the Look In Bar?

   _____

   _____

6. All TopDrawer components have the same functionality.
   a. True
   b. False

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4.10 Summary

In this Chapter you learned:

1. About TopDrawer
2. How to save draft Word documents into TopDrawer.
3. How to file electronic documents into TRIM using TopDrawer.

You should be able to save and file electronic documents from TopDrawer into TRIM.

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5. Desktop

5.1 Objectives

In this Chapter you will learn:

1. What is the TRIM Desktop
2. How to launch the Desktop
3. The Desktop functions

Following completion of this Chapter you will be able to launch and use the TRIM Desktop component. You will also be able to test your knowledge of this topic by answering the questions at the end of this chapter.

5.2 What is the TRIM Desktop?

Desktop is the module in TRIM that allows users to access the search and edit functions of TRIM without having to log into TRIM Context or TopDrawer. It is ideally suited for access to documents for quick modifications, not for full management of records or long-term modification of documents. For these functions, either TopDrawer or Context are more appropriate.

Within Desktop, users can search for records and open them for editing regardless of the native application, provided it is available on their desktop. The processes of Check Out and Check In are done automatically, providing easy access to documents.

All records are managed by TRIM and are stored in the TRIM electronic store. TRIM Context maintains revision and version control over any documents accessed through Desktop.

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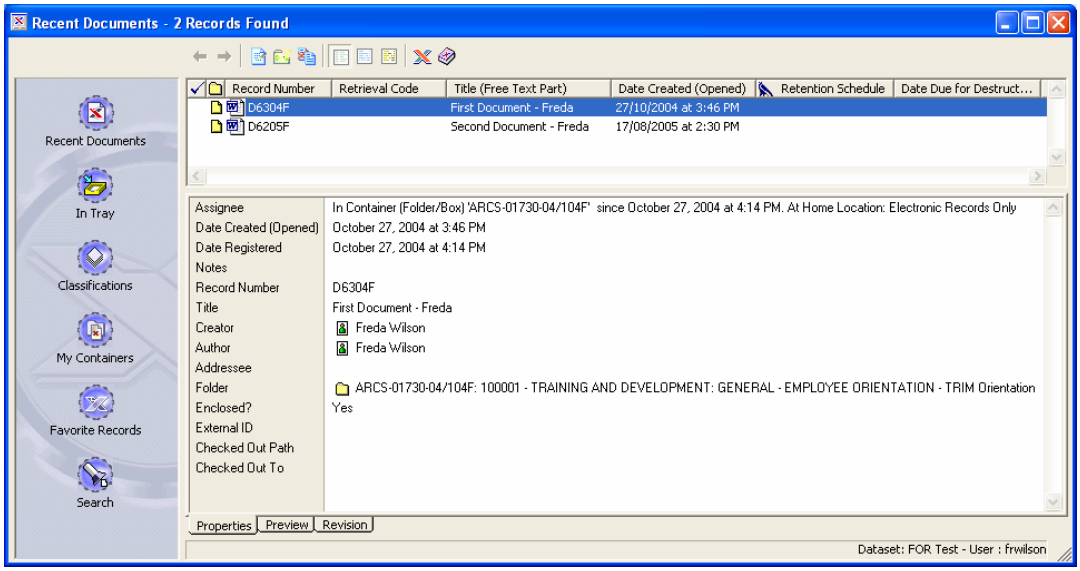
5.3 How to Launch the TRIM Desktop?

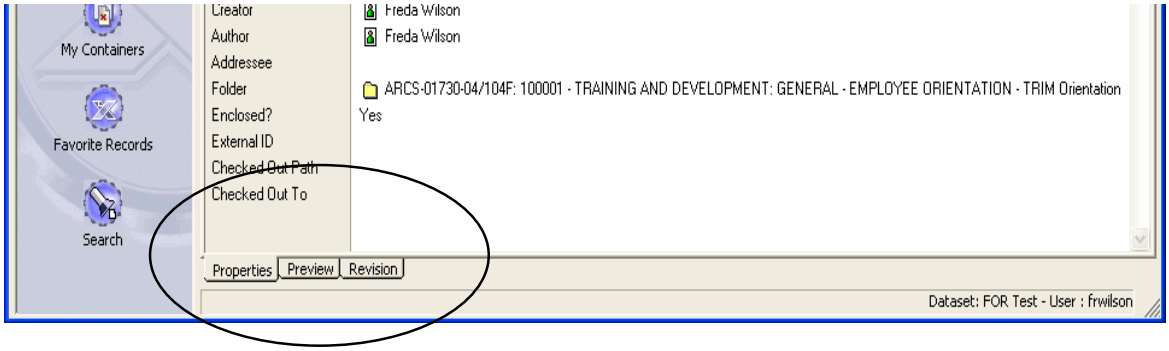
Double-click the Desktop

icon on your desktop to launch this component.



When the Desktop is launched from the Quick Launch Bar or desktop for the first time the search window will display **No Records found. Press F7 to refine your search criteria**. Press [**F7]** to select the type of search you wish to conduct.

This component of TRIM displays three tabs at the bottom left of the window. Clicking on the **Properties** tab will display the properties of the record. Clicking on the **Preview** tab will display the document in non-edit mode and clicking on the **Revision** tab will display any revisions that have been made to the document.



5.4 Specifying the Dataset

When multiple TRIM datasets are used, each one will have its own instance of Desktop. The dataset can not be changed from within the Desktop module, therefore to change datasets you must exit and restart Desktop while holding down the shift key. This will invoke the "Select Dataset" dialogue box where you can then select the desired dataset. If Desktop is launched

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without the shift key, the default dataset specified in TRIM Context will automatically be used. If no default is specified, the "Select Dataset" dialogue box will always be presented.

5.5 How Things Look in TRIM Desktop™

5.5.1 Title Bar

The Title Bar indicates which window or dialogue box you have opened. If a filter has been applied, this will be indicated by the word "Filtered" in the description. The Title Bar will also display the number of items in a list.

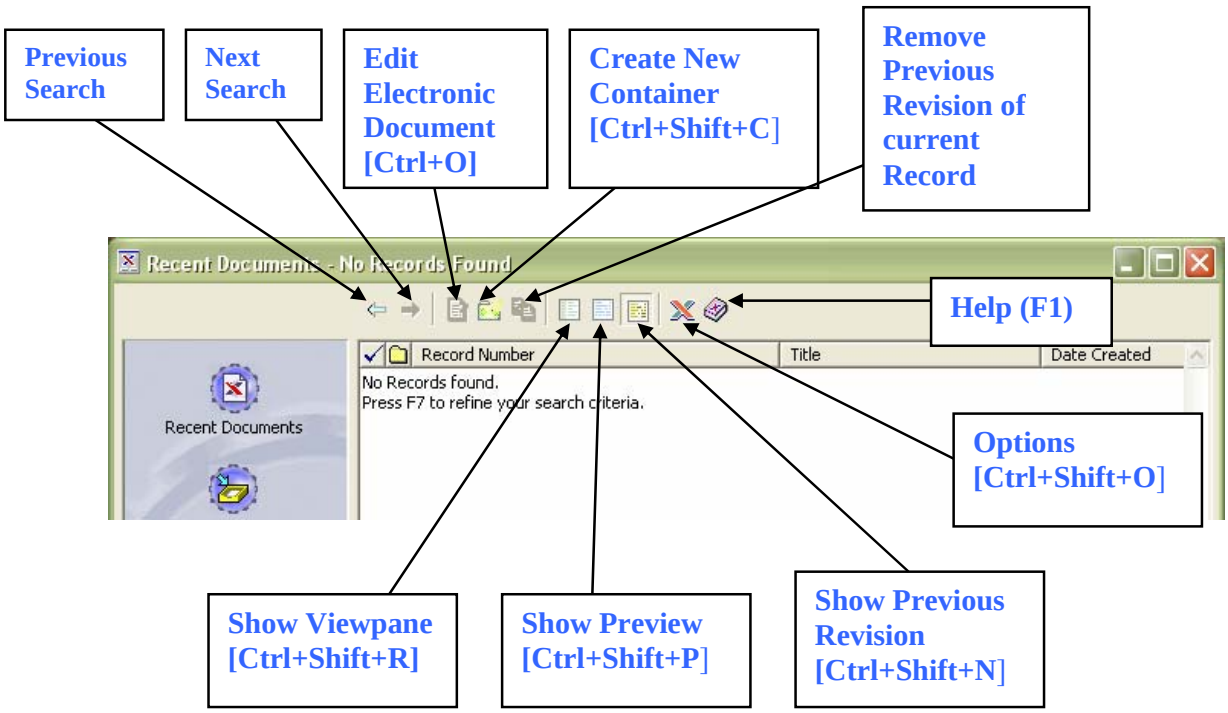
5.6 Desktop Toolbars

TRIM Desktop has a limited Toolbar located across the top and a Shortcuts Bar positioned at the left side of the Desktop window.

When the Desktop is launched from the Quick Launch Bar or desktop for the first time the search window will display **No Records found. Press F7 to refine your search criteria**. Press [**F7]** to select the type of search you wish to conduct.

5.6.1 Top Toolbar

The following is a description of the icons on the Top Toolbar.



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5.6.2 Toolbar

The Toolbar contains buttons that represent the most commonly used functions. This toolbar is supplemented by both the Shortcuts Toolbar (on the left of the screen) and by the right-click menu available in the View Pane.

Previous Search

This button allows you to go back to previous searches performed during the active session.

Next Search

This button allows you to go forward to searches performed after the currently displayed search.

Edit

When a document is highlighted, selecting this button automatically launches the associated application allowing for edits to be made. This will automatically "check out" the document from TRIM and, when the application is closed, will check it back in as a new Revision or as a replacement, depending on the configuration settings. The actual check-in occurs when the document is closed and the Refresh button (F5) is pressed in Desktop or when Desktop is closed. If the Desktop module is closed while documents are still open, a warning message is displayed to the user advising that the document must be manually checked in at a later time.

Create New Container

This button allows you to create a new container to attach a document to.

Remove Previous Revision of current Record

This button allows you to delete the previous revision of the currently selected electronic document.

Show Viewpane

This button is an alternate method of selecting the Properties tab in the View Pane.

Show Preview

This button is an alternate method of selecting the Preview tab in the View Pane.

Show Previous Revision

This button is an alternate method of selecting the Revision tab in the View Pane.

Options

This button allows you to display and modify your User Configuration Options.

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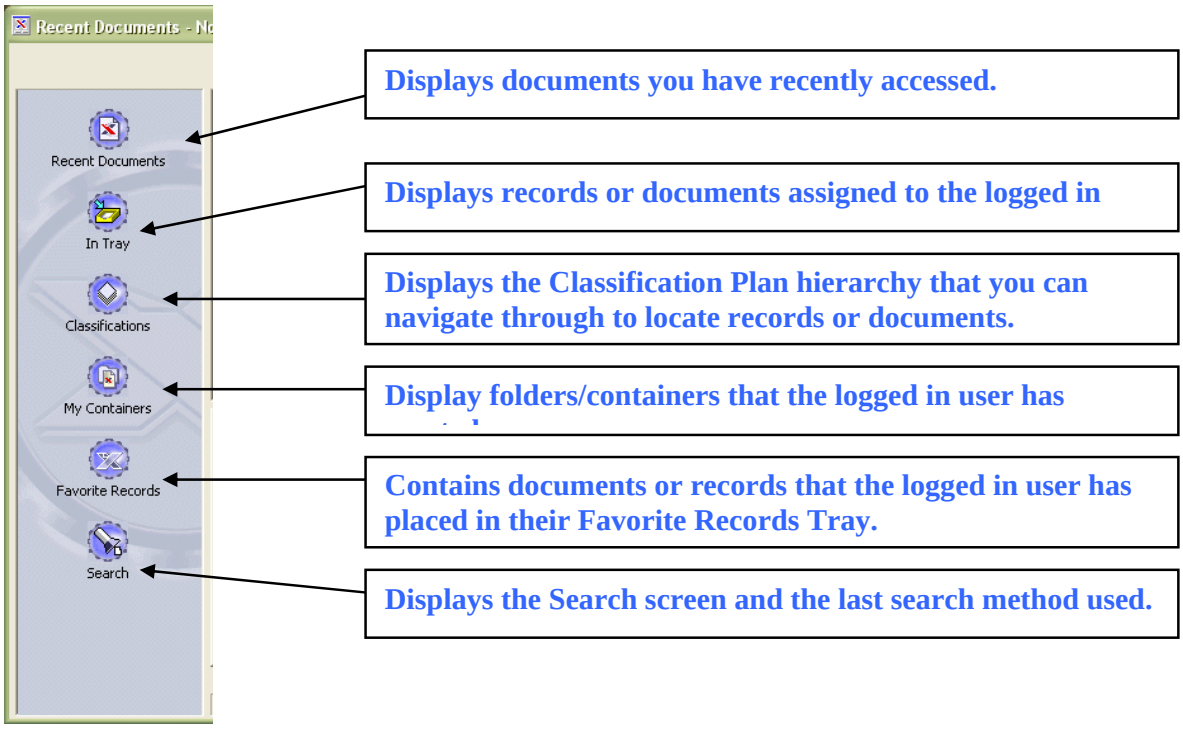
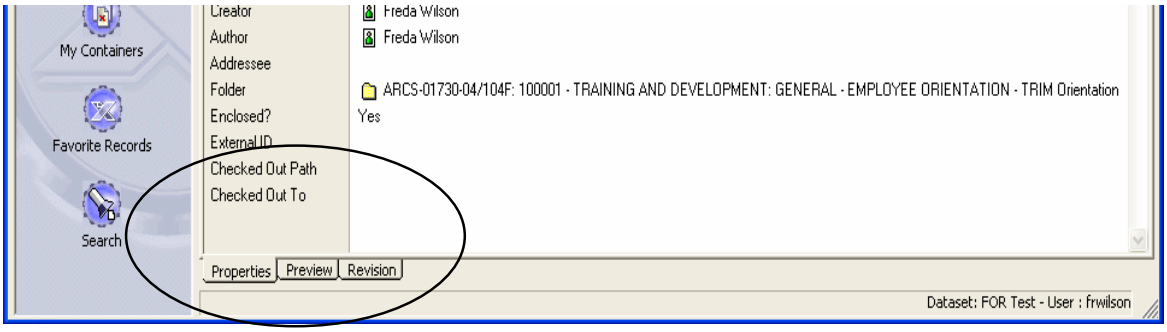
5.6.3 **Shortcuts Bar**

The Shortcuts Bar provides several methods to find your records or documents and assigned activities quickly and easily.



5.6.4 View Pane Tabs

The View Pane displays specific information about the currently highlighted item. Within Desktop there are three options for this view.



Properties

This tab displays the metadata for the selected item. The fields are user selected and are accessed using the right-click menu in the View Pane. Following is an example of some of the fields that can be displayed in Desktop.

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Preview

This tab allows you to view the document without having to launch its native application.

Revision

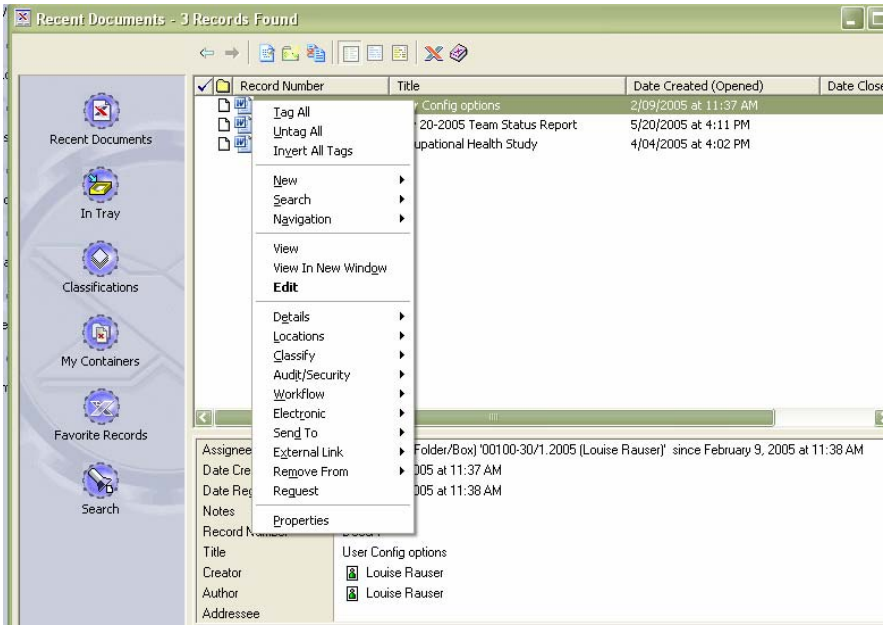
This tab allows you to view the most recent version of the document prior to the last changes. If no revisions have been made, the message states that no previous revisions exist.

5.6.5 Status Bar

The Status Bar displays the name of the dataset you are connected to and the name of the user logged in.

5.6.6 Right-Click Menu

The Right-Click Menu can be used to perform all Desktop functions. Simply highlight a record in the List Pane and right-click to open this menu.



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5.7 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. Desktop allows you to search and edit records without having to log in to TRIM Context or TopDrawer.
    a. True
    b. False

2. How do you set the Default Dataset in Desktop?

    _____

    _____

    _____

3. What is the purpose of the Shortcuts Toolbar?

    _____

    _____

    _____

4. What are the three different views available in the View Pane?

    _____

    _____

    _____

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5.8 Summary

In this Chapter you learned:

1. What is the TRIM Desktop
2. How to launch the Desktop
3. The Desktop functions

You should now be able to launch Desktop and use the available functions.

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6. E-MAIL AND TRIM

TRIM can integrate with Microsoft Outlook, which means that you can catalog your e-mails directly from Microsoft Outlook.

6.1 Objectives

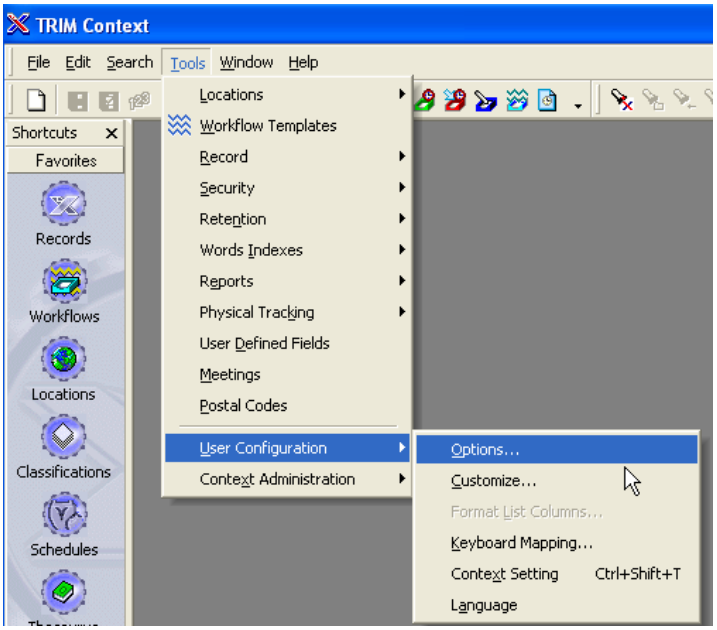
In this Chapter you will learn how to:

1. Integrate TRIM with Outlook.
2. Catalogue e-mail messages with and without attachments.
3. Send attachments to TopDrawer.

Following completion of this chapter, you will know how to integrate TRIM with Outlook, catalogue e-mail messages and attachments and send attachments to TopDrawer for editing. You will also be able to test your knowledge of this topic by answering the questions at the end of this chapter.

6.2 Integrating TRIM with Outlook

To integrate TRIM with Outlook, navigate to the Integration tab via Tools > User Configuration > Options.



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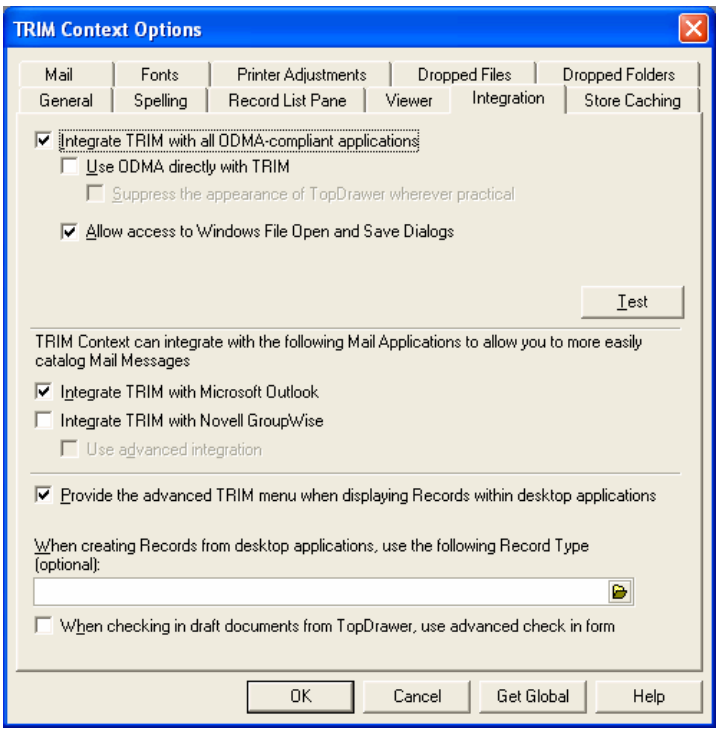
Ensure that the items checked are the same as those shown in the following screenprint:



6.3 Toolbar

When you start up Outlook, you will have four TRIM icons and a TRIM drop down menu on your Outlook toolbar.

6.3.1 Catalog

Catalog the selected e-mail into TRIM Context. This option will allow you to Catalog the e-mail and any attachments as a single record in TRIM. If no default Record Type has been set up, select the record type required and click OK.
Fill in the entry form and click OK. TRIM will tell you the number of the record once registered. Neither the e-mail nor the attachment can be modified afterwards.

6.3.2 Catalog Attachment(s) Only

Catalog the selected e-mail's attachments into TRIM Context. Select this option when you want to Catalog only the attachment(s) of the e-mail. The e-mail message itself is not saved. This method will allow the newly created record to be Checked Out and modified if required.

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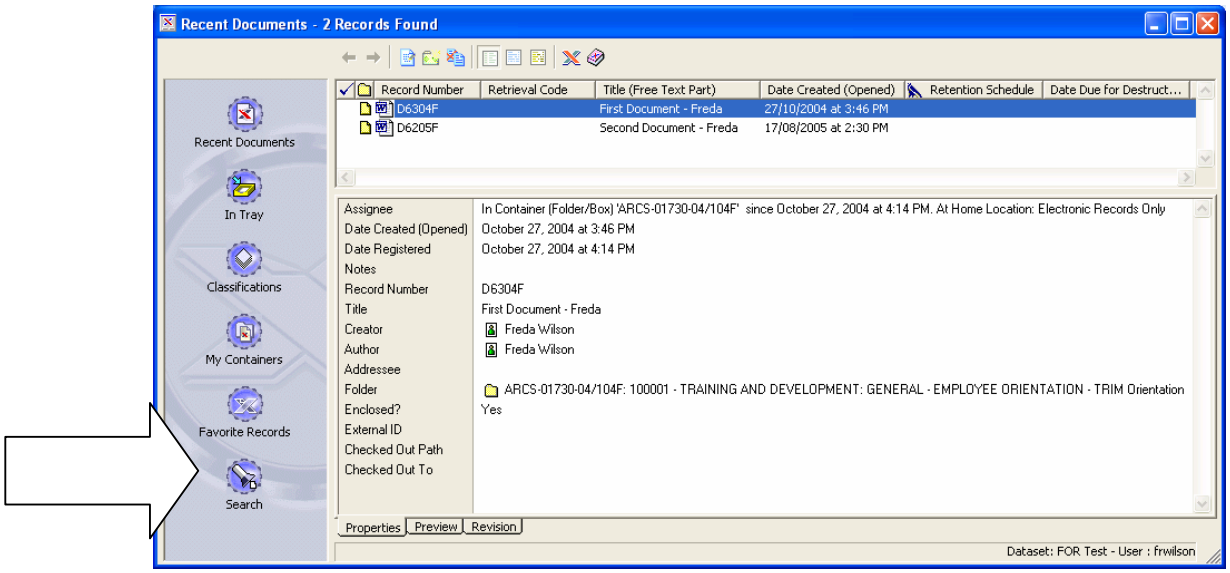
6.3.3 Send Attachments to TopDrawer

Send the selected e-mail's attachments to your TopDrawer. This option is mainly used when the attachment(s) needs to be opened and modified before cataloguing the record in TRIM.

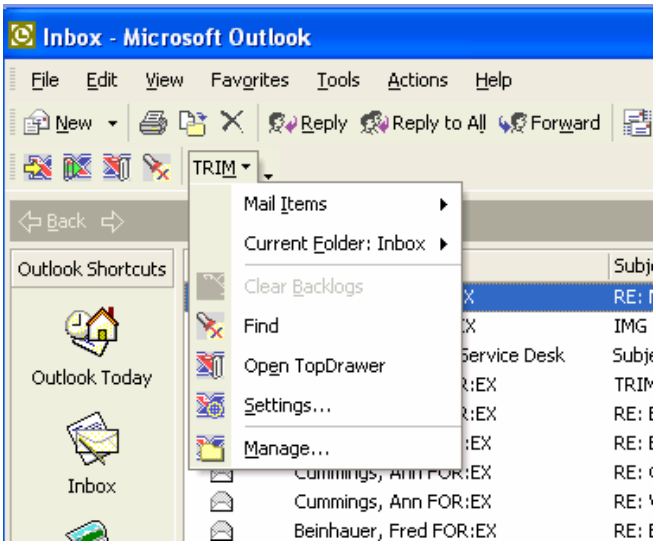
6.3.4 Search in TRIM

Find a record in TRIM Context. This option launches the Desktop and displays your recent documents. From here you can search for records not listed.



6.3.5 TRIM Menu

This menu option provides functions to maintain your e-mail integration processes.



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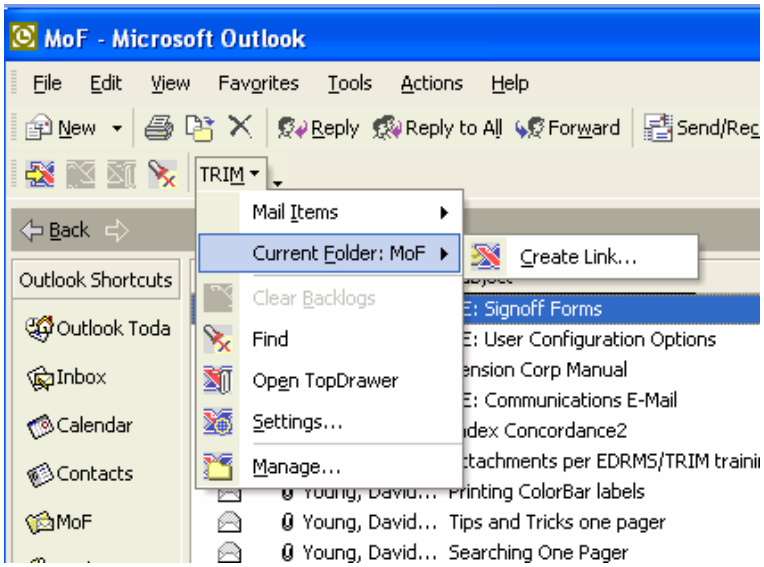
6.3.6 Mail Items

There are several choices in how you can Catalog an e-mail and/or its attachments into TRIM. Select the e-mail you wish to Catalog and from the TRIM drop down list in the Outlook Toolbar select Mail Items, or click on the appropriate icon on the toolbar.

6.3.7 Current Folder: <current folder>

If the current folder has not yet been linked to TRIM, the menu will display it as 'Current Folder: <current folder>' and will provide the option to create a link.



6.3.7.1 Create Link

A link can be created from the selected folder to a Container in TRIM. These links can then be processed in bulk by using the Clear Backlogs option.

6.3.8 Linked Folder: <current folder>

If the folder has already been linked to a TRIM Container you can select from the following options:

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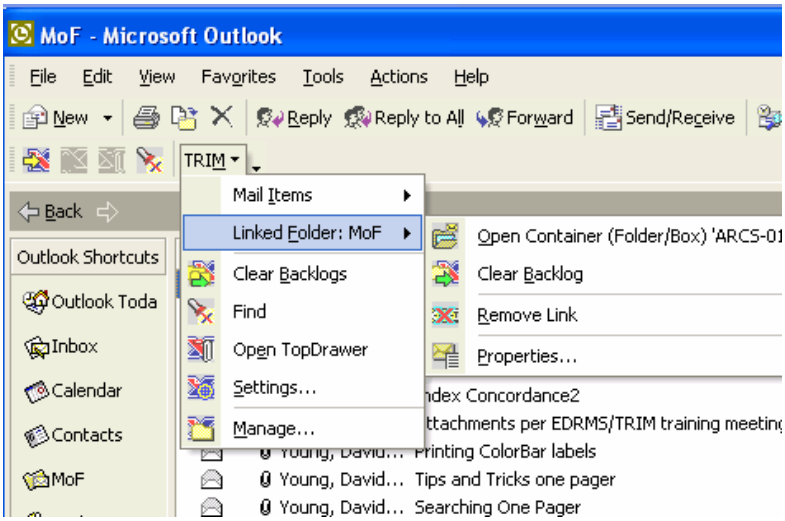

6.3.8.1 Open Container

Opens the Container in TRIM.

6.3.8.2 Clear Backlog

Will process any e-mails in the Linked Folder.

6.3.8.3 Remove Link

Remove the current Link.

6.3.8.4 Properties

Shows the Properties of the created Link.

6.3.9 Clear Backlogs

All e-mails in all Linked Folders will be processed. You may also use the Manage menu option to catalog e-mails in a selected folder or from all linked folders.

6.3.10 Find

Find a record in TRIM Context. This option launches a Search.

6.3.11 Open TopDrawer

TopDrawer can be opened from Outlook to give access to any documents currently in your TopDrawer.

6.3.12 Settings

Settings allow for various defaults to be set. They include whether you want the data entry form to be displayed, as well as default record type and default container. Select the appropriate record type for your office.

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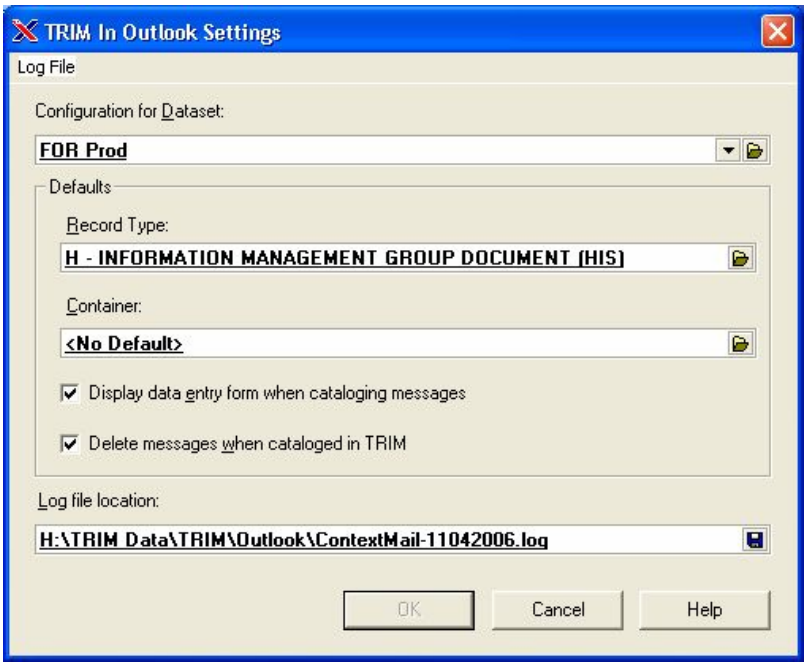

6.3.12.1 Configuration for Dataset

Use the KwikSelect to select the correct dataset if using multiple datasets. The following Defaults can be set for the Dataset selected.

6.3.12.1.1 Defaults

6.3.12.1.1.1 Record Type

This is the default Record Type that will be used by each Linked Folder that is set up. Leave blank if your Linked Folders need to use different Record Types.

6.3.12.1.1.2 Container

This is the default Container that will be used by each Linked Folder that is set up. Leave blank if your Linked Folders need to use a different Container.

6.3.12.1.1.3 Display data entry form when cataloguing messages

Check this option if you wish to display the Record Entry Form for each e-mail being processed, allowing you to enter metadata details for the e-mail being catalogued. By not selecting this option, TRIM will process the e-mails automatically with no input from the user.

6.3.12.1.1.4 Delete messages when cataloged in TRIM

Check this option if you wish e-mails to be deleted from the Outlook folder once they have been catalogued into TRIM.

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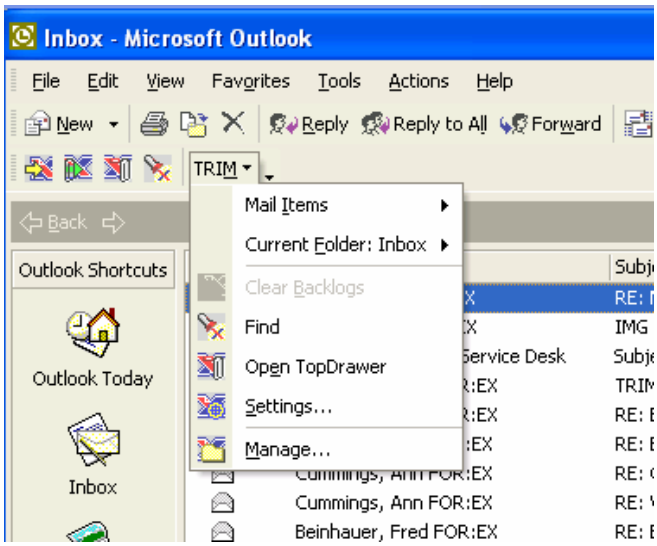
6.3.12.1.2 Log file Location

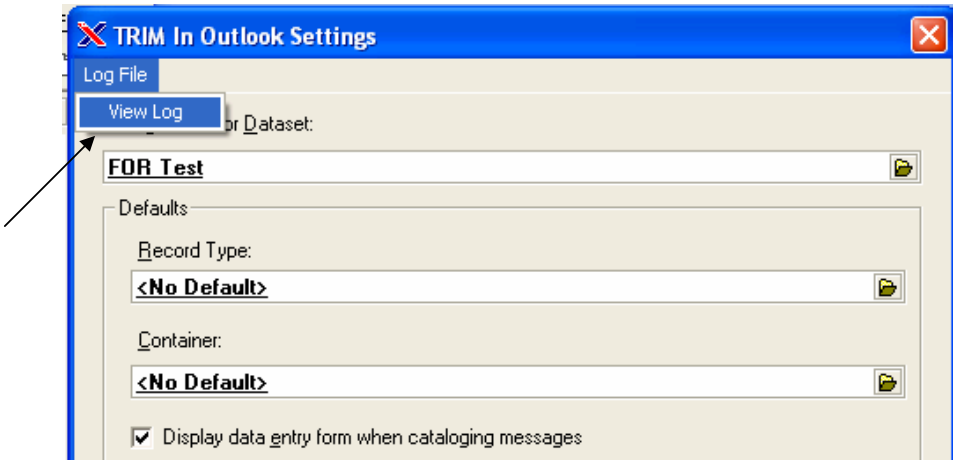
The log file is stored on the local drive under the user's Application Data path. It is used to document the cataloguing process in Outlook and any configuration changes such as changing datasets. To view the Log File:

A. Click the down arrow next to the TRIM Menu and choose Settings.



The TRIM in Outlook Settings dialogue box will open.

B. Click **Log File** at the top left of this screen



C. The Log File will open in Notepad

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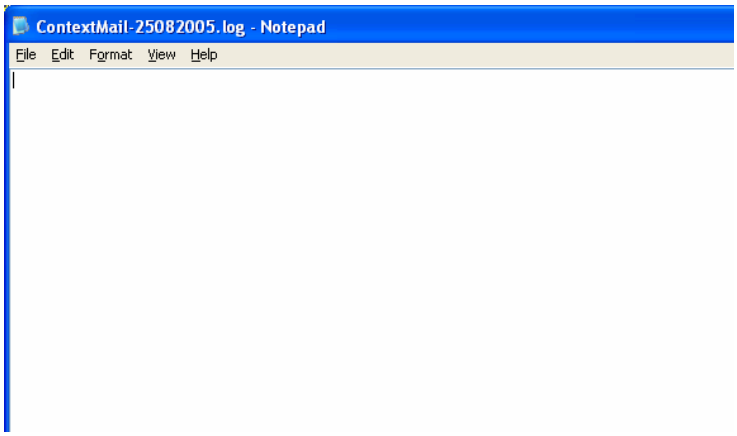


You can view the information entered in this file.

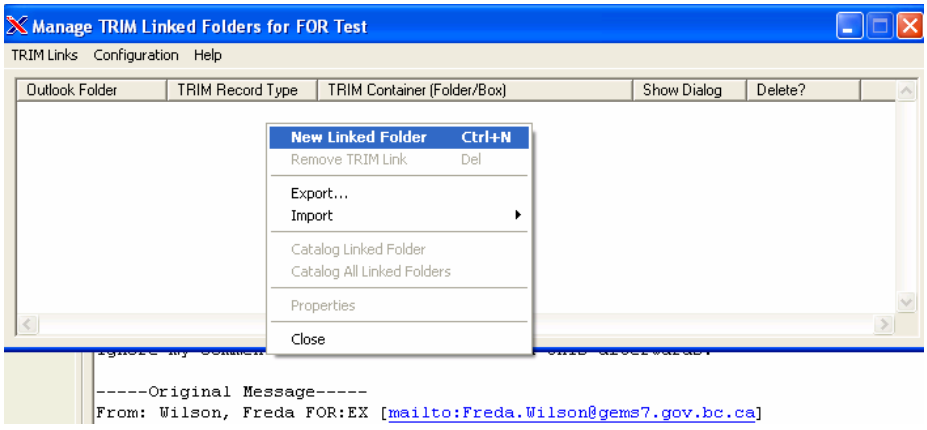
6.3.13 Manage

The Manage function allows you to catalog e-mails in a selected Outlook folder or all Linked Folders you have crreated. You can also remove links or change the Properties from the Manage function.

6.4 How to Create Linked Folders in Outlook

Linked Folders allow you to process e-mail simply and efficiently into TRIM Context. E-Mail placed in this folder will be processed automatically according to the defaults setup for the folder.

A. From the TRIM menu, select Manage which will display the Manage TRIM Linked Folders dialogue box:



B. Right-click and select New Linked Folder. A mail folders dialogue box will display allowing you to select the folder from which you wish to process. If you do not wish to use one of the displayed folders, click on New to create a new mail folder.

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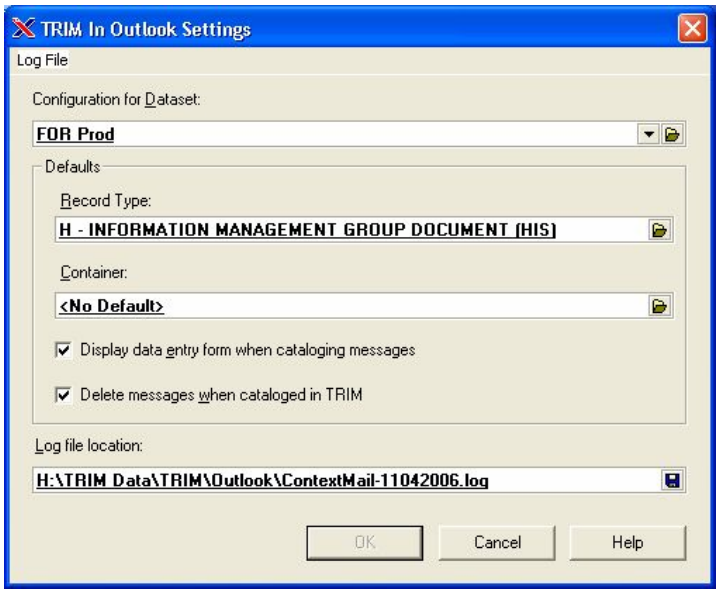
> ⓘ It is recommended that you do NOT link your Inbox to TRIM Context. If you do, all the e-mail you receive will be processed into TRIM Context.

Once you have selected the folder, the TRIM Folder Properties dialogue box will display:



Enter the following details:

6.4.1 TRIM Dataset

Specify the TRIM Dataset to be used.

6.4.2 Record Type

This field is mandatory. You may type in the Record Type name, use the drop down list to select a Record Type (this list contains Record types you have used previously), or use KwikSelect to select from the available Record Types.

6.4.3 Container

This field is mandatory. Use this field to set the container that ALL e-mails processed from this folder will be contained within.

6.4.4 Display data entry form when cataloguing messages

Select this check box if you wish to display the entry form when processing e-mails. This allows you to enter further details for the e-mail. Clearing this check box will process the e-mails without displaying the entry form.

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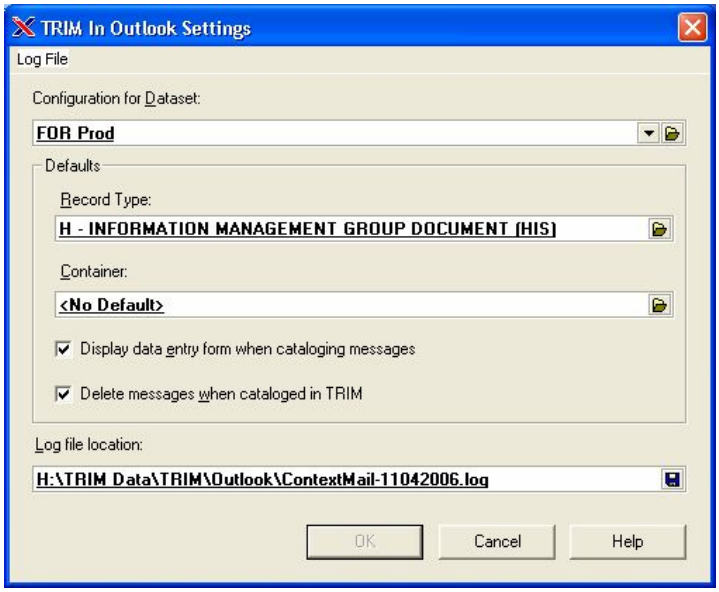
6.4.5 Delete messages when cataloged in TRIM

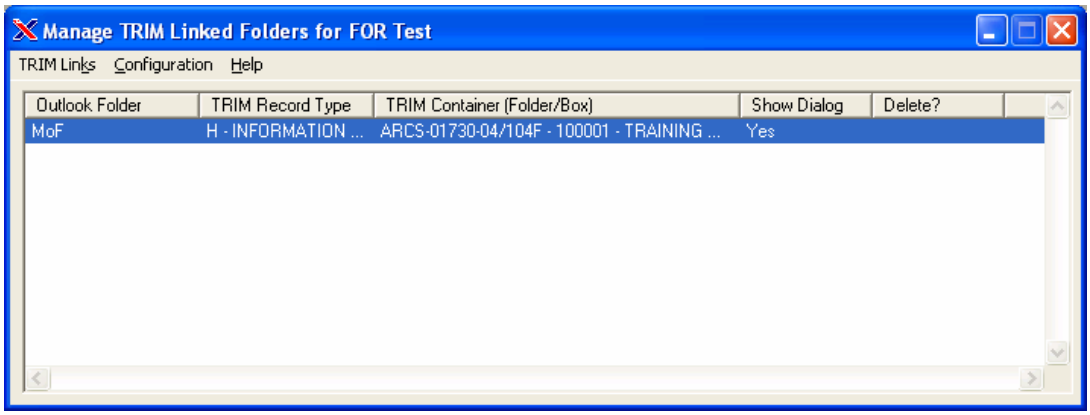
The default is set to delete e-mail messages once they have been catalogued in TRIM Context.

The following screenprint shows the default setting:



The Record Type and Container details will vary for each linked folder from Outlook.

Click *OK* to see the newly created Linked folder.



You may now use TRIM In Outlook to catalog your mail messages.

6.5 Sending a TRIM Record via E-mail

In order to send a record to an email address, you must first define the correct configuration of your email application within TRIM Context.

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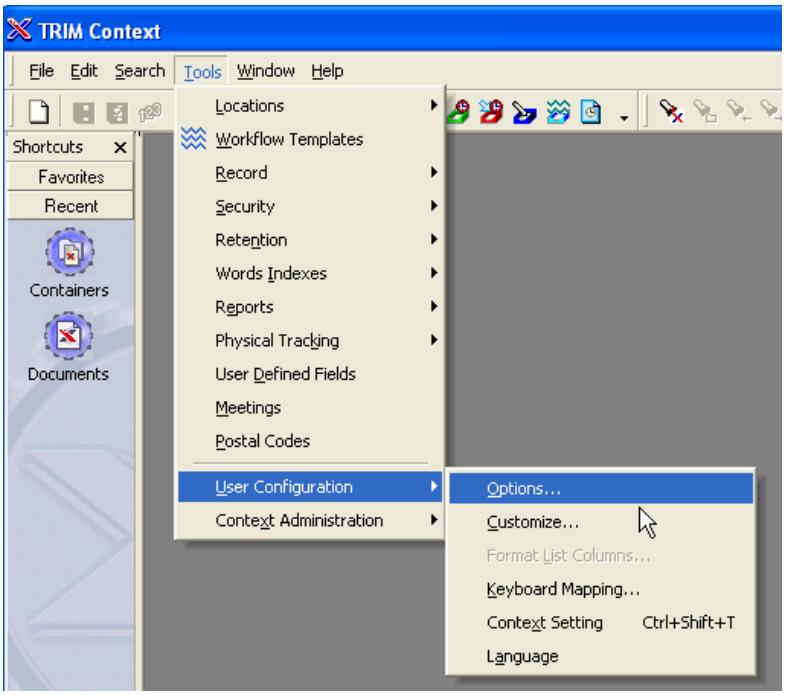

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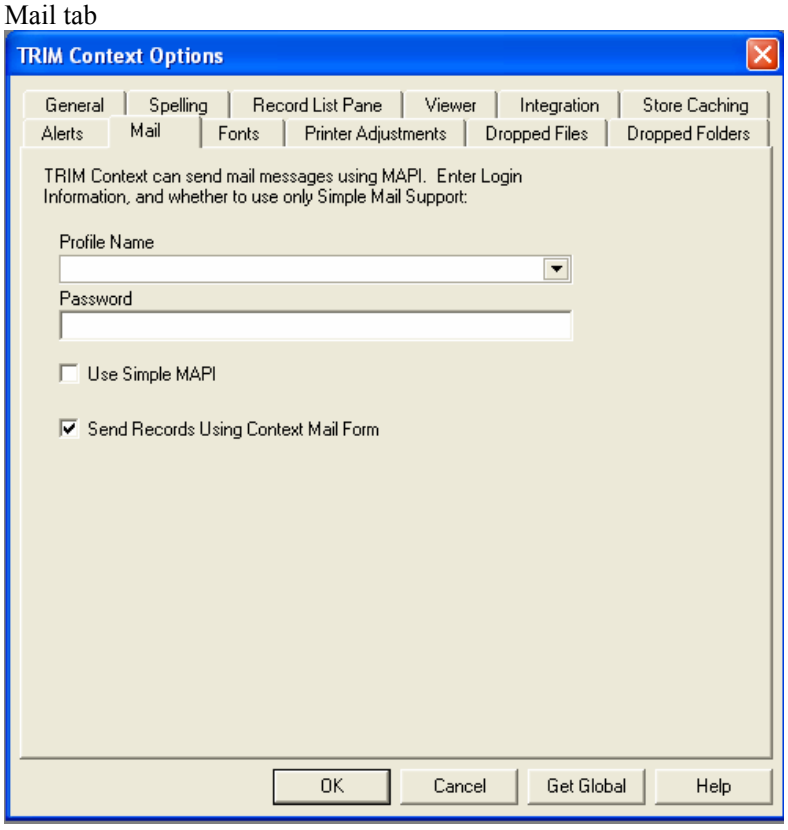
Mail tab



Select your profile name and make sure the other items on this screen are checked or unchecked as indicated on the screenprint above.

Once this configuration is complete, use the following steps to send a record to someone from TRIM Context via e-mail using the Context mail form.

A. Find and select the record(s) you wish to send.

B. From the File Menu select Send To - Mail Recipient.

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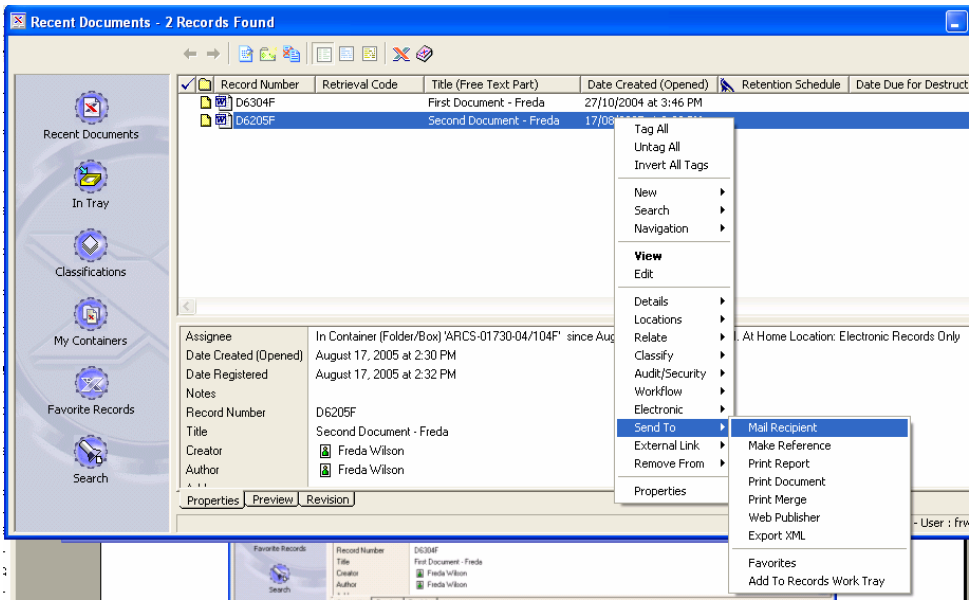
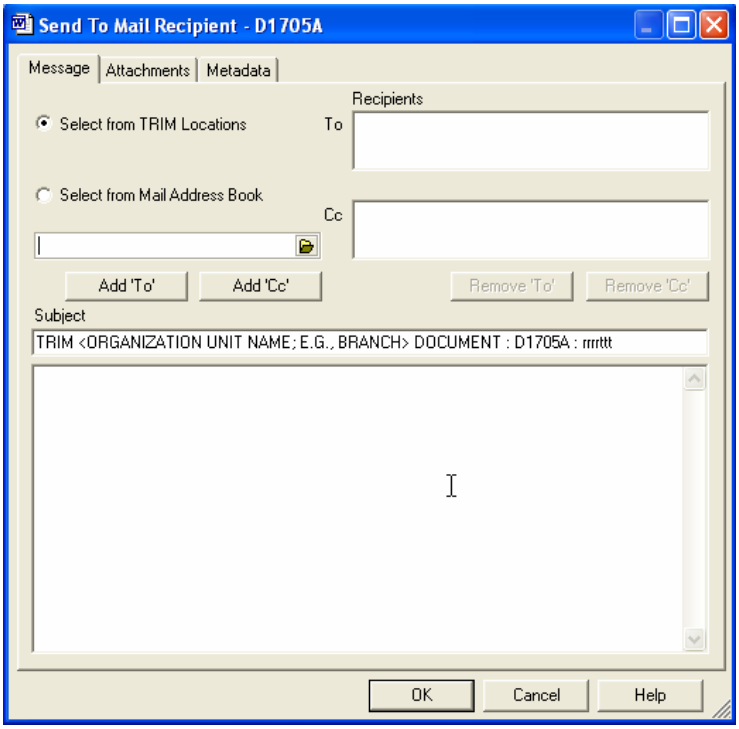


C. Insert the appropriate information within each tab (see details 1.5.1).



D. Click OK.

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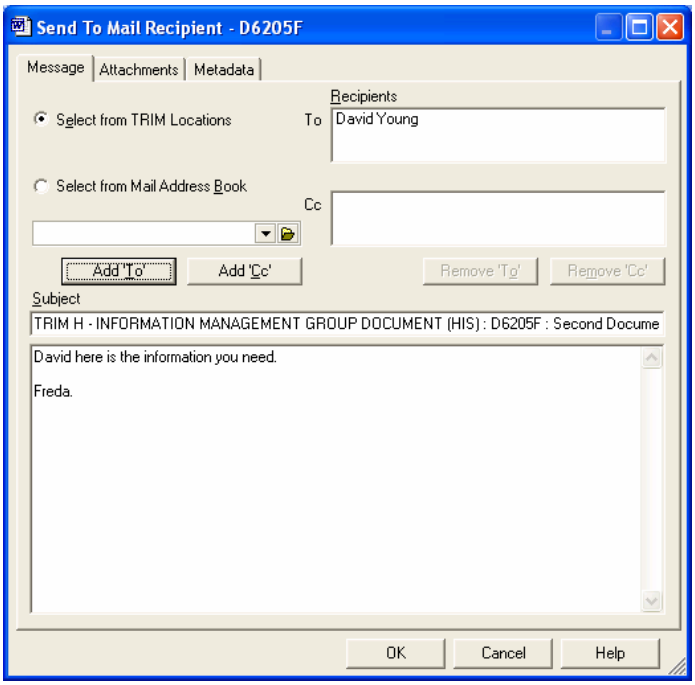
6.5.1 Message Tab

If the simple MAPI option was selected during configuration, the Message tab will not appear. The message send dialogue box for the e-mail type being used will appear after you have filled in the Attachments and Metadata tabs and pressed OK.

> ⓘ For more information about simple MAPI and why it is used see the Online Help Administrator Guide - User Configuration - User Options - Message Tab.



6.5.1.1 Select from TRIM Locations

Use this button to access e-mail addresses linked to Locations in TRIM.

6.5.1.2 Select from Mail Address Book

Use this button to access e-mail addresses in your Mail Address Book.

6.5.1.3 Recipients

You can choose to select an e-mail address from the TRIM Locations list, or from your Mail Address Book. The KwikSelect can then be used to select the recipient's name. If an e-mail address is not in either list, you can type the address in the KwikSelect field. Press Add 'To' or the Add 'Cc' button to insert the recipient into the To or Cc area. The recipients can be highlighted and removed via the Remove 'To' and Remove 'Cc' buttons.

6.5.1.4 Subject

Insert the subject or title of the e-mail.

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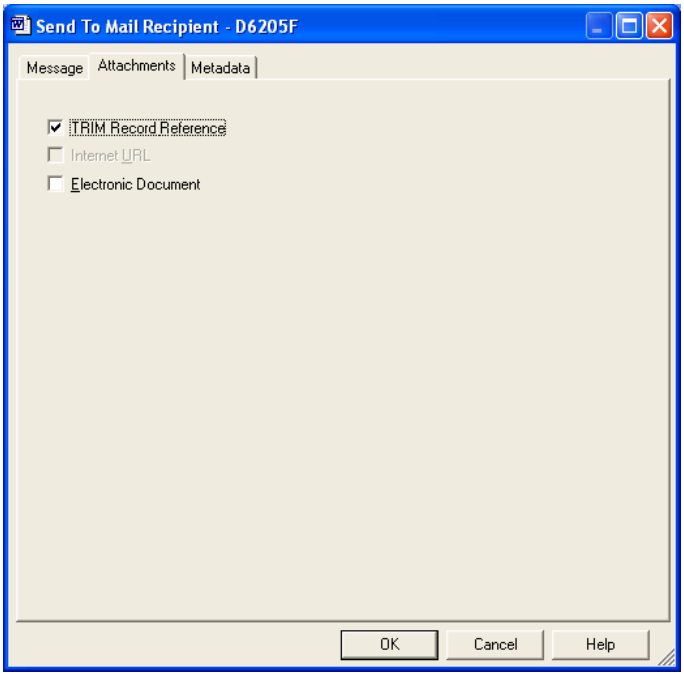
6.5.1.5 Message Text

Information that is entered in the large field below the Subject header will become the main body of the e-mail message.

6.5.2 Attachments Tab

This tab allows you to specify what is to be sent.



6.5.2.1 TRIM Record Reference

This will send a TRIM Record Reference for e-mail recipients to view the document in TRIM.

6.5.2.2 Internet URL

This will send a URL for e-mail recipients to view the document through a web browser.

6.5.2.3 Electronic Document

This will send a copy of the Electronic Document.

6.5.2.4 Electronic Renditions (only displays if applicable)

This will send a copy of the Rendition of the Electronic Document.

6.5.3 Metadata Tab

The Metadata tab allows you to select which metadata fields and data will be included in the e-mail. Highlight the appropriate field in the Available fields list and press Add. The field will appear in the Active fields list. The Up and Down buttons can be used to rearrange the order of the Active fields list. Select an Active field and press Remove if you do not want it included in the e-mail.

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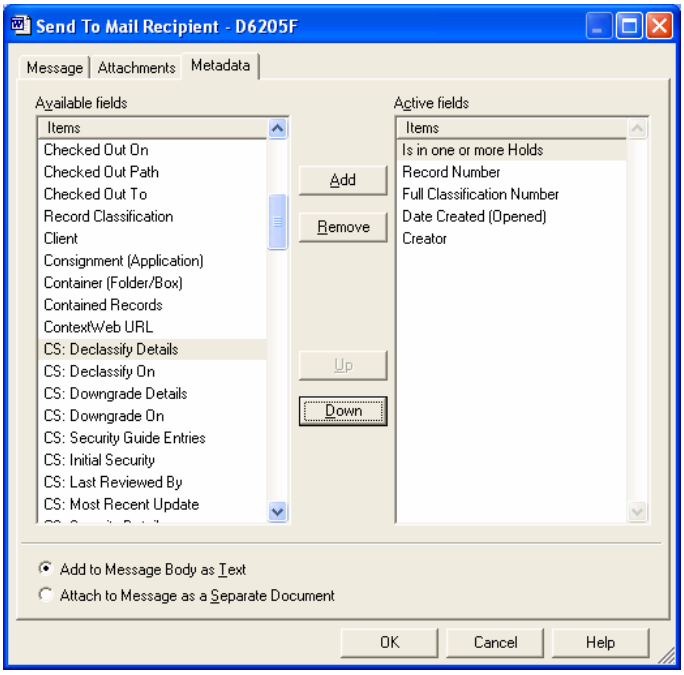

The following options are available from this tab:

6.5.3.1.1 Add to Message Body as Text

This option inserts metadata in the e-mail message text.

6.5.3.1.2 Attach to Message as a Separate Document

This option will attach the metadata to the e-mail as a separate attachment (*.txt document).

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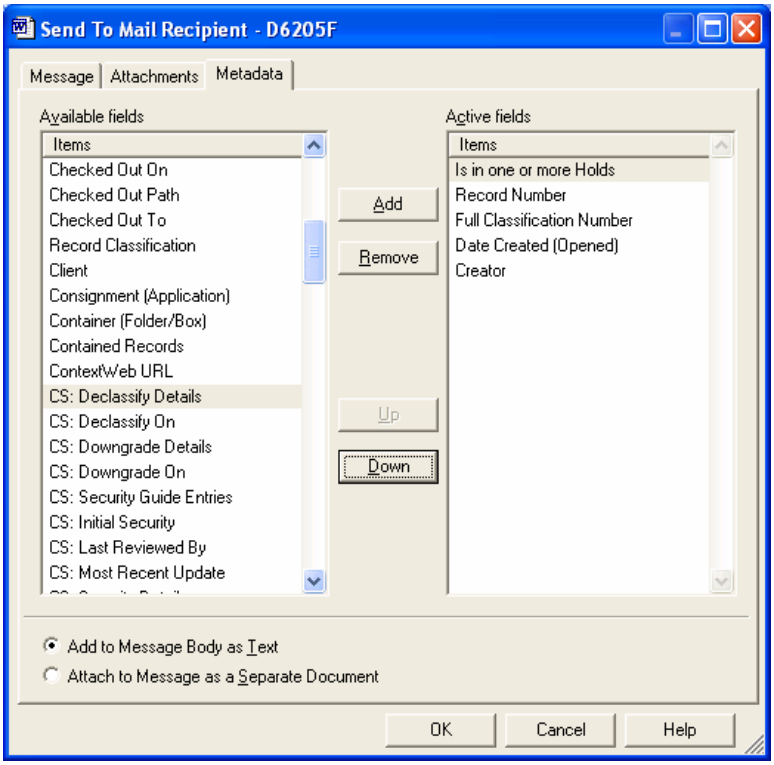

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6.6 Questions

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. How do you integrate TRIM with Outlook?

   _____

   _____

2. E-mail messages and their attachments cannot be catalogued separately.
   a. True
   b. False

3. You must switch from Outlook to TRIM when searching for records.
   a. True
   b. False

4. What are the three ways to catalogue e-mails and/or their attachments?
   (a) _____
   (b) _____
   (c) _____

5. What are Linked Folders?

   _____

   _____

   _____

6. Can you send a record via e-mail from within TRIM?
   a. Yes
   b. No

7. How do you change the TRIM dataset in Outlook?

   _____

   _____

   _____

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6.7 Summary

In this Chapter you learned how to:

1. Integrate TRIM with Outlook.
2. Catalogue e-mail messages with and without attachments.
3. Send attachments to TopDrawer.

You should now be able to integrate TRIM with Outlook, catalogue e-mail messages and attachments as well as send attachments to TopDrawer.

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7. Printing Labels

TRIM Context provides the capability of printing a variety of reports, barcode labels and consignment lists, etc. The application comes with a variety of default report layouts. Those users with the appropriate permissions can also create their own report layouts. The data printed on the reports comes from search results.

7.1 Objectives

In this Chapter you will learn:

1. How to use the Print Report function to print labels.
2. How to print labels with barcodes.
3. How to use the Skip Labels function.

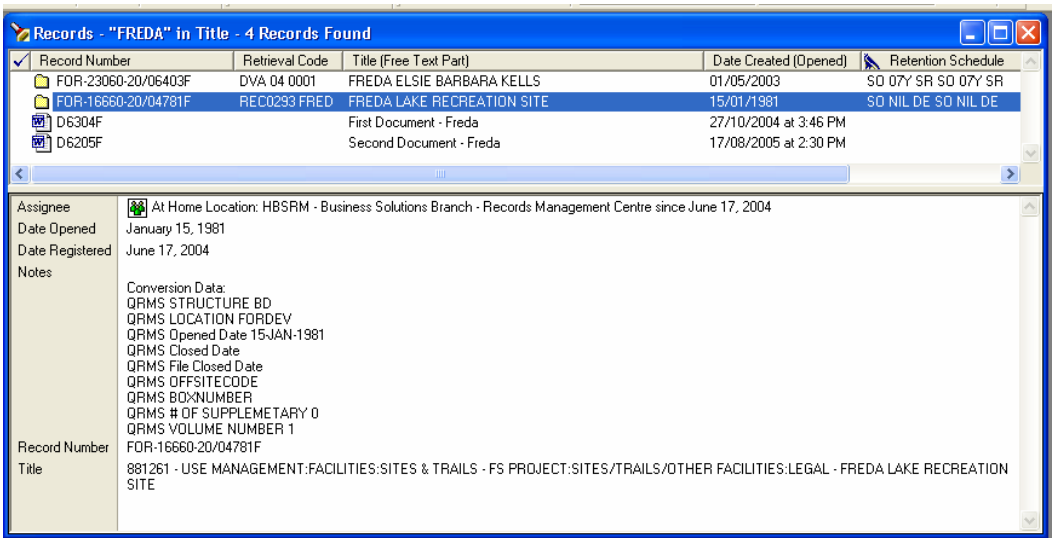
Following completion of this chapter you will know how to print labels by searching and tagging records and using the Print Report function.

7.2 Printing a Single Label

TRIM Context treats a label as a report, so we will use the Print Report function to print a single label as well as multiple labels.

The basic steps for printing a label are:

A. Search for the record.



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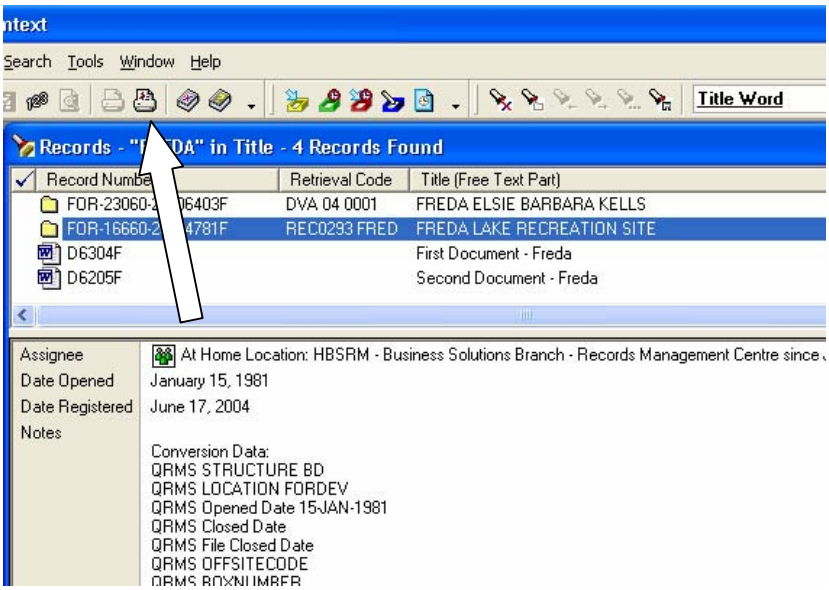
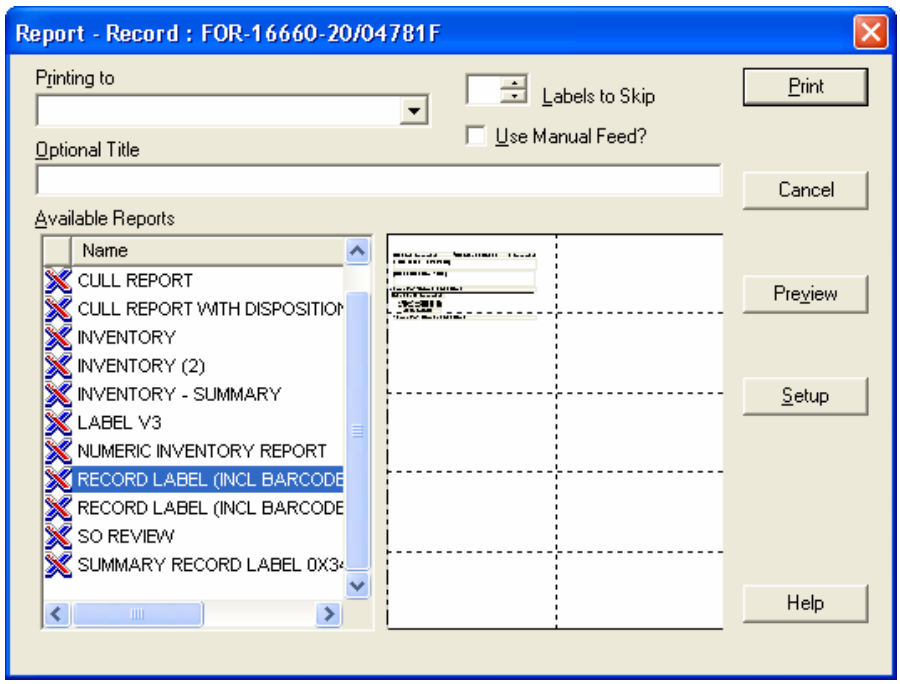
B. Highlight the record and click the **Print Report** icon on the toolbar to print the report, or you can right-click the record and choose **Send To> Print Report** from the shortcut menu.



4. Highlight the appropriate Label Report Layout from the list of reports.



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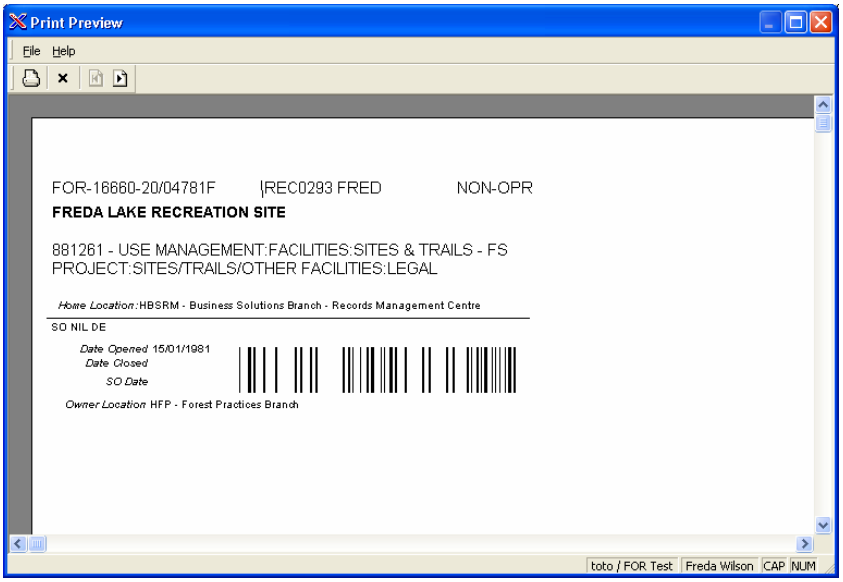
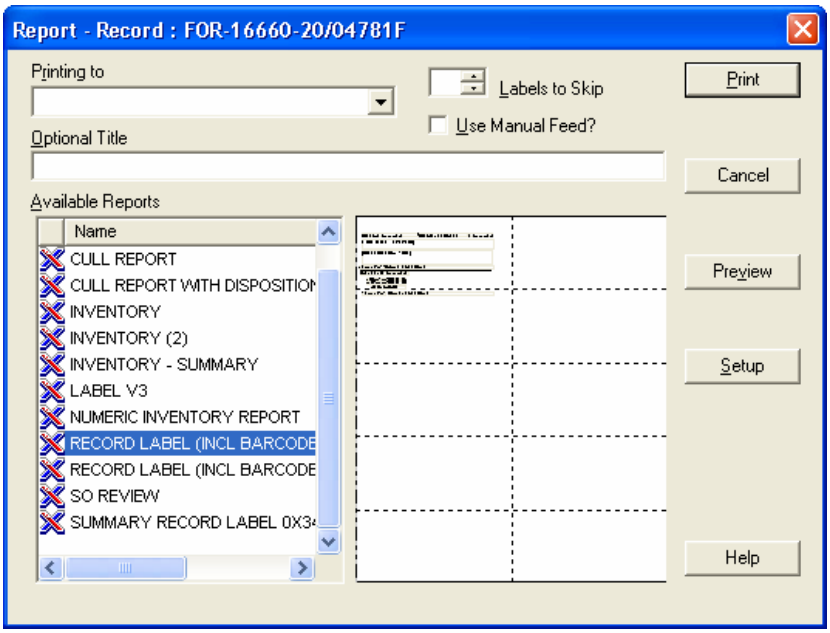
5. Click the **Preview** button to see how the label will look when printed.



6. Click on the **Printer** icon to print the label from Print Preview, or
7. Click the **x** in the toolbar to return to the Reports List screen.

8. Click the **Print** button. TRIM will use your Windows default printer or you can select a different one from your list of installed printers.



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7.3 Printing Multiple Labels

Printing multiple labels is a matter of 'Search, Tag, and Do'. You search for the records, tag them and then send them to a label report for printing.

7.4 How Do I Print Single/Multiple Labels?

Exercises - Printing Labels

Exercise 1 Printing a Label

This exercise will demonstrate how to generate and print a label in TRIM Context.
You should be at the main Context screen.

Search for records containing the Title Word **Handout** that were created in the previous chapter.

1. Highlight the folder record containing your name.
2. Right-click on the record and choose Send To from the short-cut menu
3. Choose Print Report
4. Highlight the **Record Label (INCL SEC)** Layout from the list of reports.
5. Click the Preview button to view the label and then print from the toolbar.
6. Exit and return to the Search Results screen.

Exercise 2 Printing a Label

Complete the exercise below to print multiple labels, based on the steps learned in the previous exercise.

1. You should be at the main Context screen.
2. Search for a folder record of your choice.
3. Send to **Print Report**.
4. Select the **Record Label (INCL SEC)** layout from the list of reports.
5. Click the Preview button to view the label and then print from the toolbar.
6. Exit and return to the Search Results screen.

Exercise 3 Printing Multiple Labels

This exercise will demonstrate how to print multiple labels in TRIM Context.
You should be at the main Context screen.

1. Search for all folder records containing the Title Word **Training**.
2. Press [**Ctrl**][**A**] on the keyboard to place a checkmark to the left of each record or, right-click and choose Tag All from the short-cut menu.

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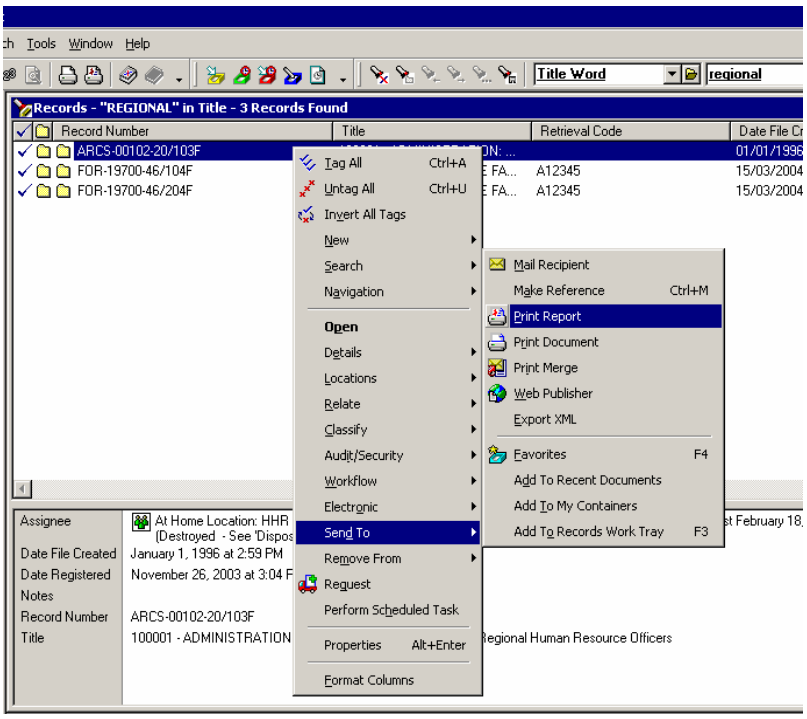

3. Click the **Print Report** icon on the toolbar or, right-click and choose **Send To>Print Report** from the short-cut menu.
4. Click *OK* to print all tagged records

5. Select the **Record Label (INCL SEC)** Layout from the list of reports.
6. Click the Print button to print the labels or,
7. Click the Preview button to view the labels and then print from the toolbar.

Exercise 4 — Printing Multiple Labels

Complete the exercise below to print multiple labels, based on the steps learned in the previous exercise.

1. You should be at the main Context screen.
2. Search for and tag a group of folder records of your choice.

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3. Send to **Print Report**.
4. Select the **Record Label (INCL SEC)** layout from the list of reports.
5. View the labels in Preview mode and then exit and return to the Search Results screen.

7.5 Printing Labels with Barcodes

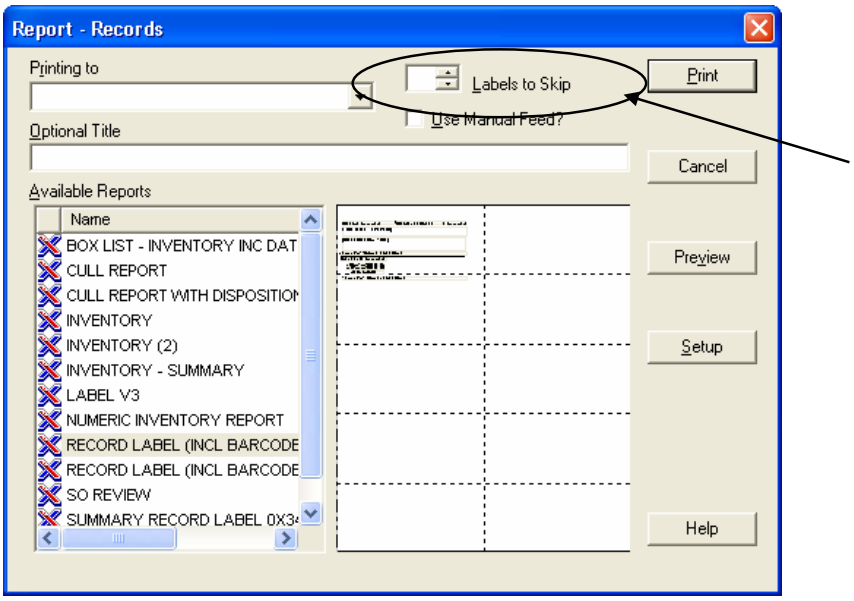
TRIM provides the option of using either foreign barcodes or using TRIM's own unique barcode numbering system. These barcodes can be printed onto labels.

To do this, search for the records, tag them, then send them to Print Report and then choose the Record Label (INCL BARCODE) layout from the list of reports.

Try searching for some records and printing them to the above record label layout with the barcode.

7.6 Skip Labels

You can print out as few or as many labels as you need. If you have printed only a few labels from a sheet, TRIM gives you the option of using the remainder of that sheet to print labels. You can specify how many labels to skip in order to print further down the sheet and you can choose to use Manual Feed.



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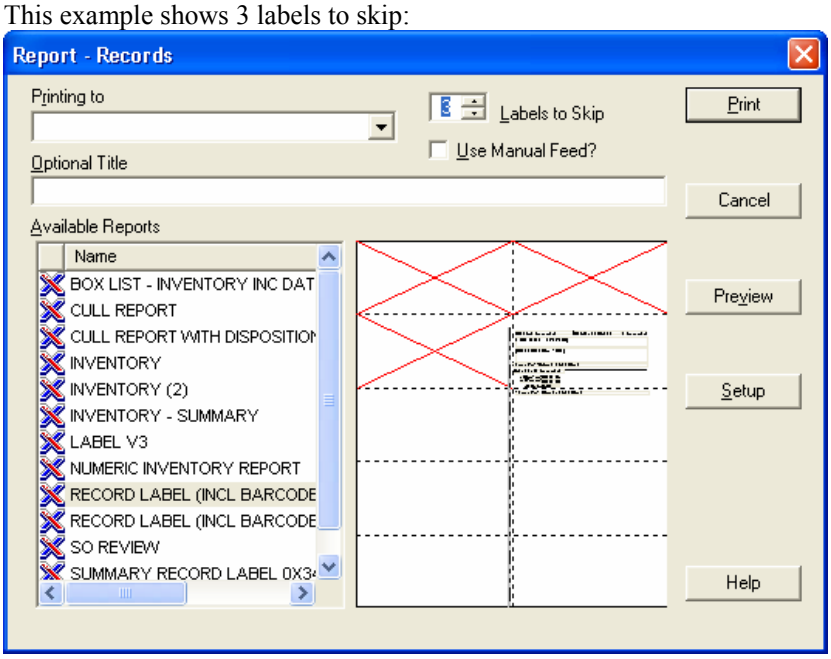
This example shows 3 labels to skip:



7.7 How Do I Print ColorBar Labels?

This Chapter provides the instructions on how to print ColorBar Labels using the 'Search, Tag and Do' function.

7.8 Search for the Files

Follow the steps below:

A. Create a search within TRIM to find the files you want to print labels for.

B. Select the files to print, right-click and select **Send To> Print Merge**. The following Dialogue Box will appear:

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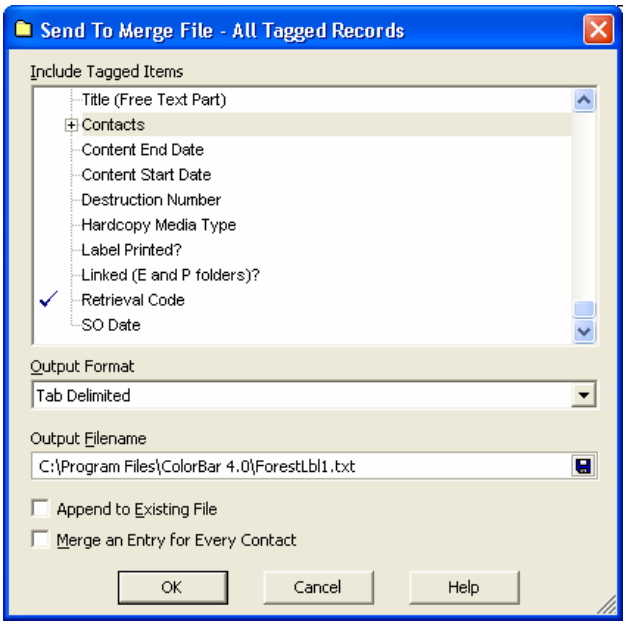

C. Scroll down and put check marks beside **"Record Number"** and **"Retrieval Code"** by clicking to the left of the name. The list is not in alphabetical order. The selected tagged items will default the next time you open TRIM.

D. Use the drop-down menu to choose Output Format of **"Tab Delimited"**. Click on the Disk icon **beside "File Output Name"** and navigate to C:\Program Files\ColorBar 4.0\ForestLbl1.txt.

E. Make sure **"Append to Existing File"** and **"Merge an Entry for Every Contact"** are NOT checked. Click **OK** to continue.

F. Click on "Yes" to overwrite the file C:\Program Files\ColorBar 4.0\ForestLbt1.txt.

G. When prompted to Send to Merge File – All Tagged Records, select "Yes To All".

H. Open the ColorBar program by going to Start → Programs → Smead and click on ColorBar Gold 4.0

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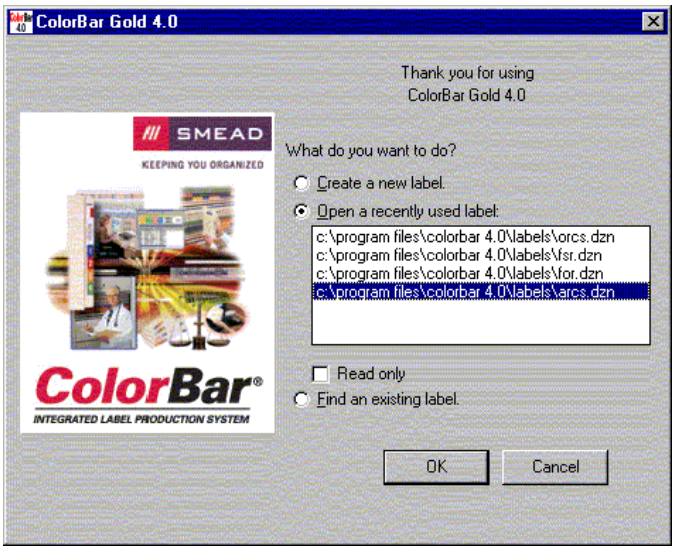

I. When the program opens, you will be prompted to choose a template:

J. Click on the desired design template to highlight it and click OK. (see 6.9 below for choosing a label design)

K. ColorBar will open and you will see an example of the template, but not the data.

7.9 Choosing a Label Design

There are eight different ColorBar label designs:

A. aab.dzn - Aboriginal Affairs files (begins with 5 large digits – this is not the normal, but please use for consistency)
B. afiles.dzn - A files only
C. arcs.dzn - Arcs files only (begins with 4 large digits)
D. fsr.dzn - Forest Service Roads only
E. letters.dzn - W, R, S, EP, INV, SUP, T, PF files
F. orcs.dzn - Orcs files only (begins with 5 small digits)
G. rpp.dzn - Real Property Project files for RTEB only
H. tfl.dzn - TFL files only

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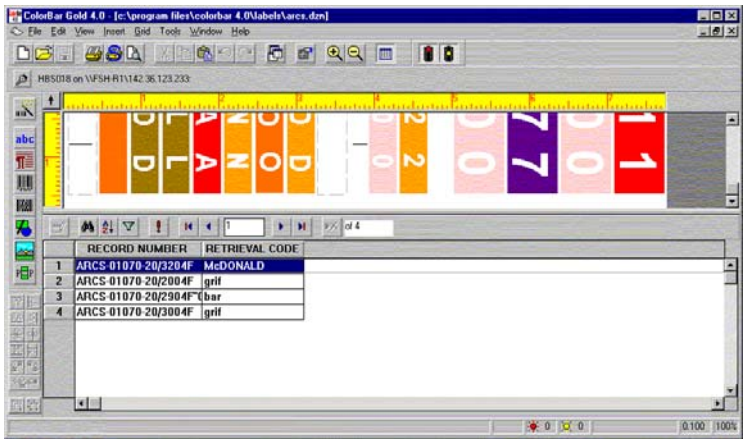
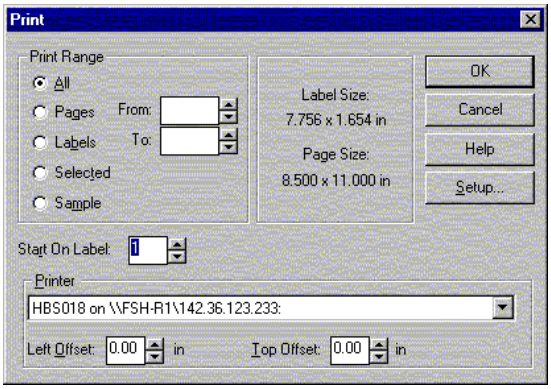


I. Go to the Grid menu and choose “Data Grid” or simply click on the “Data Grid” icon, as shown above.

J. The files you selected in TRIM will be displayed. To print the labels, go to the File menu and choose “Print” or alternately click on the “Print” icon.

K. From the Print window, you can choose to select All of the labels or select labels.



L. You can also choose which label number on the label sheet to start printing.

M. Use the drop-down menu to choose the color printer. Click on the Setup tab to select the required paper tray.

N. Click OK to complete printing.

O. Printer settings will be saved the next time you go into TRIM, so all steps may not be required.

P. When printing is complete, be sure to remove the data selection on ColorBar by clicking the “Data Grid” icon. Further labels cannot be generated until the data grid is clear. The program can be minimized for future use once the data is no longer being displayed.

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7.10 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. You can only print one label at a time in TRIM.
   a. True
   b. False

2. How do you print barcodes onto labels?

   _____

   _____

3. Any type of user in TRIM can design Label type reports.
   a. True
   b. False

4. Only one type of label can be printed in TRIM.
   a. True
   b. False

5. How do you print multiple labels in TRIM?

   _____

   _____

6. Printing out a few labels means the rest of the sheet is wasted.
   a. True
   b. False

7. What feature in TRIM is used to print labels?

   _____

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7.11 Summary

In this Chapter you learned:

1. How to use the Print Report function to print labels.
2. How to print labels with barcodes.
3. How to use the Skip Labels function.

You should now be able to print labels by searching and tagging records and using the Print Report function.

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8. 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.*

8.1 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.

NOTE: *During our initial implementation, branches are to continue requesting files using the existing procedure*

8.2 How Do I 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.

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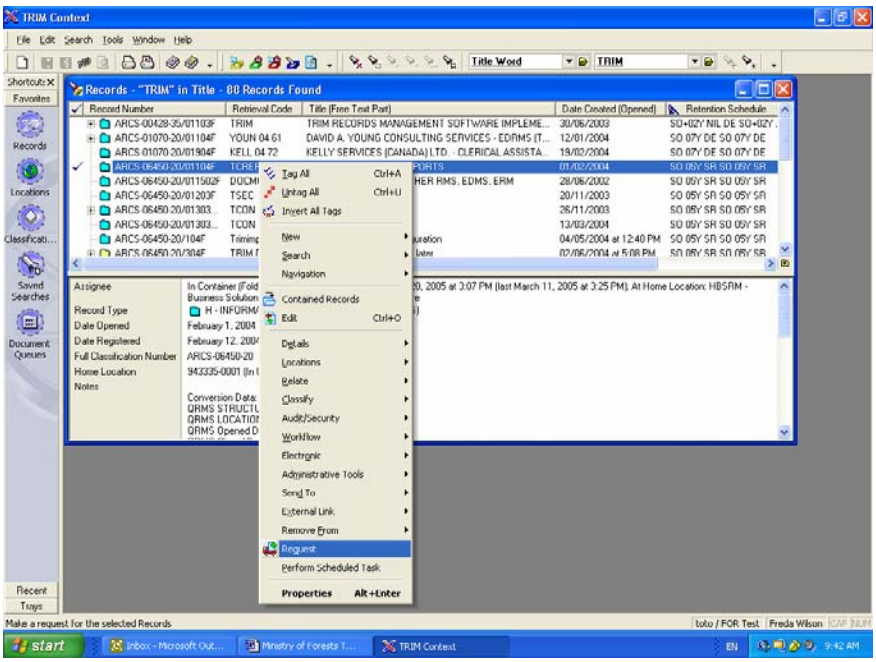

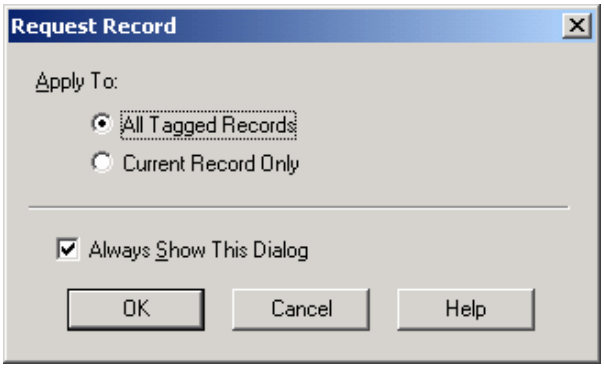

C. You will only see this Dialogue Box if you have tagged more than one record. Click *OK* to confirm you wish to request all tagged records.

The following dialogue box will appear:

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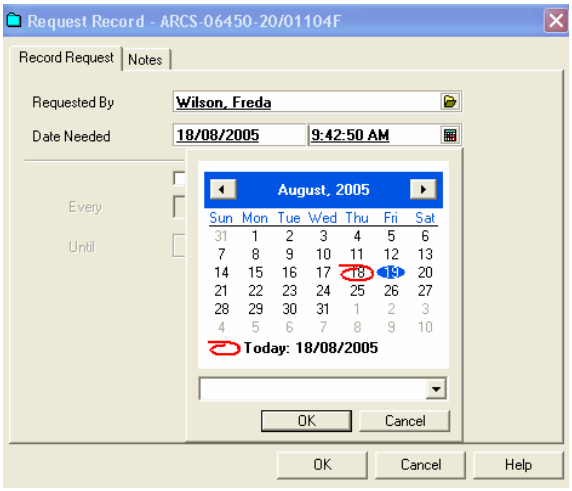
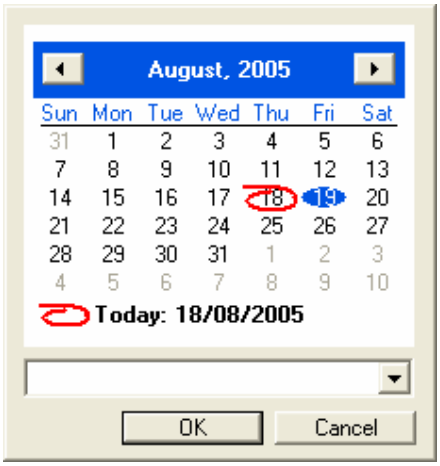


Note: The **Requested By** field defaults to the login user id.

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).

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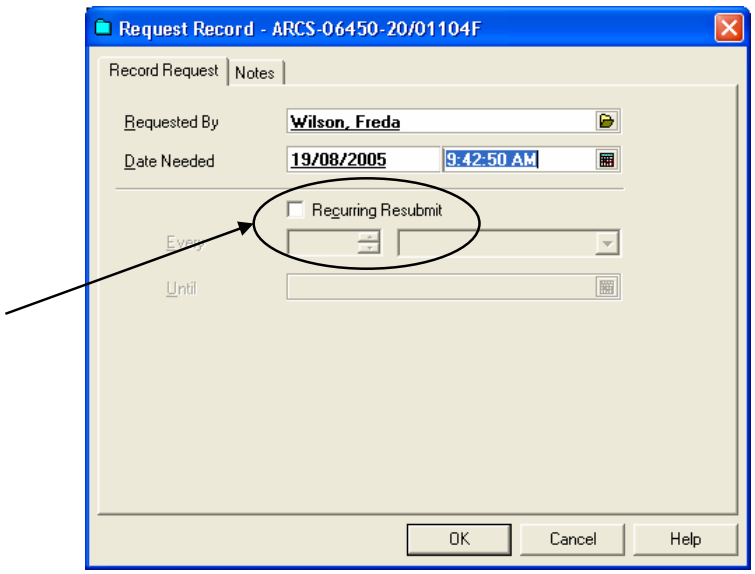
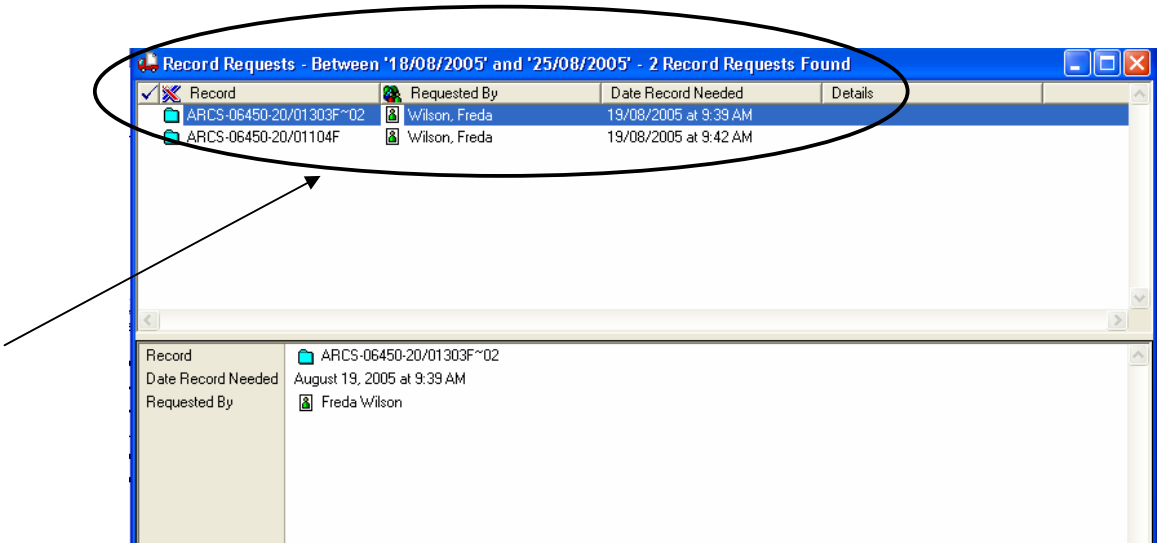


F. Click *OK* to submit the request.

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 Date.**



Complete the following two exercises to submit a record request.

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Exercises - 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

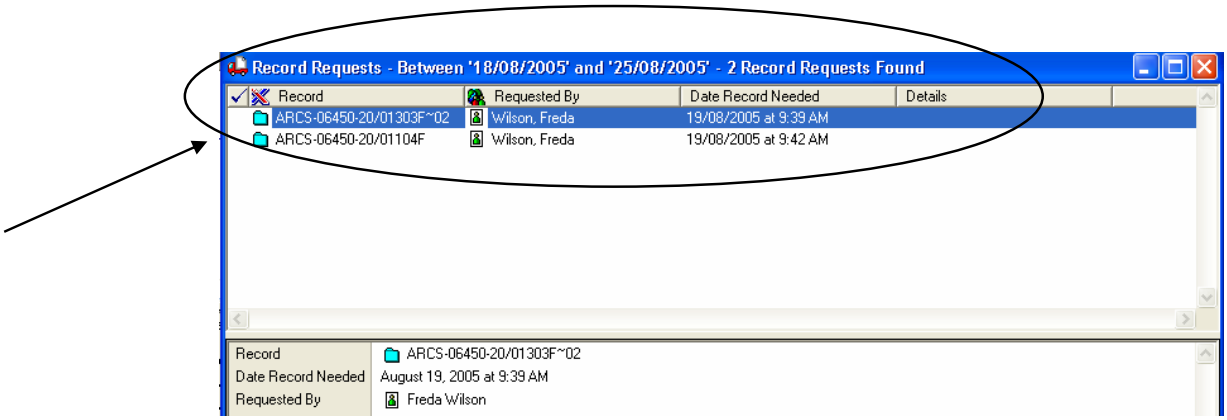
Complete the following exercise to submit a record request based on the steps you have just learned.

1. You should be at the main Context screen.
2. Search for another folder record that you created.
3. Submit a request for this record for some future date.

8.3 How Do I Process a File Folder Request?

There are a couple of ways an Information Worker can locate record requests. One is to search for requests by location and the second is to do a search for record requests by date range.

For example, here is the result of a search for records by date range of **18/08/2005 - 25/08/2005**:



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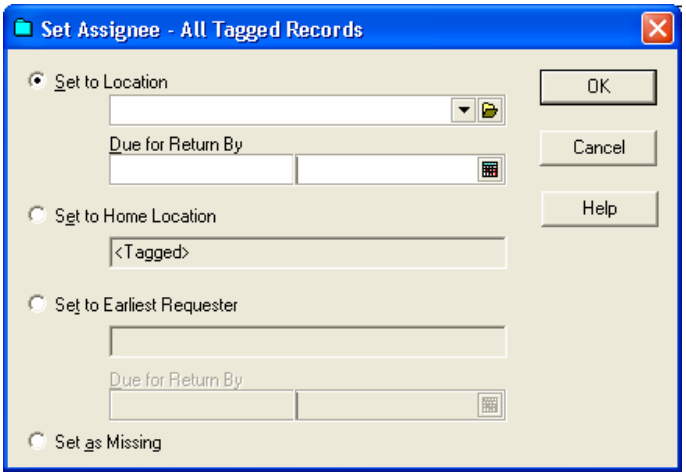
G. Once the file has been located, right-click on the record and choose **Locations>Assignee** from the short-cut menu and the following Dialogue Box will appear.



H. Click the **Set to Location** radio button.

I. Type the first few letters of the **Assignee's** surname or click the **KwikSelect** button to search for the requestor location, for example, David Young.

J. If more than one location meets the criteria, they will be listed otherwise TRIM enters the location that matched the entry. For example:

K. Click the Calendar button and select the date that the file is **Due for Return By**.

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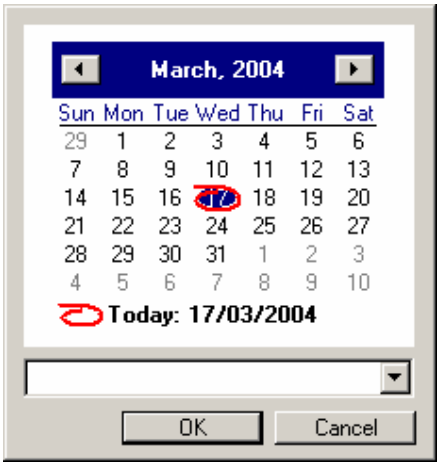
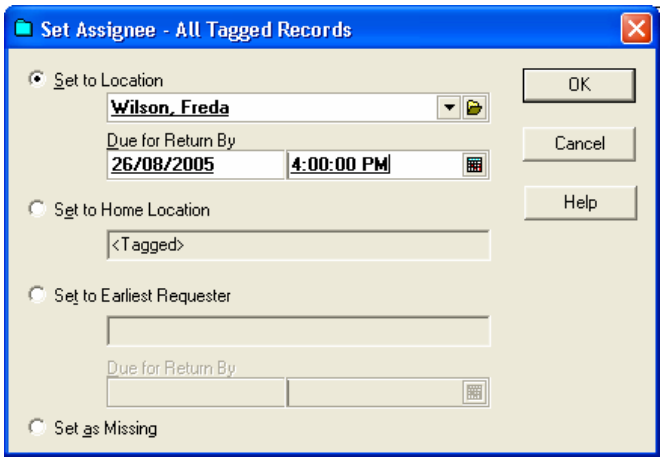


L. Click *OK* to set the **Due for Return By** date.



M. To change the date click on the Calendar button to the right of the Due for Return By Date field.

N. Locate the correct month by clicking the right arrow to scroll beyond the current month and then 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.

O. Click OK to set the new Assignee to David Young.

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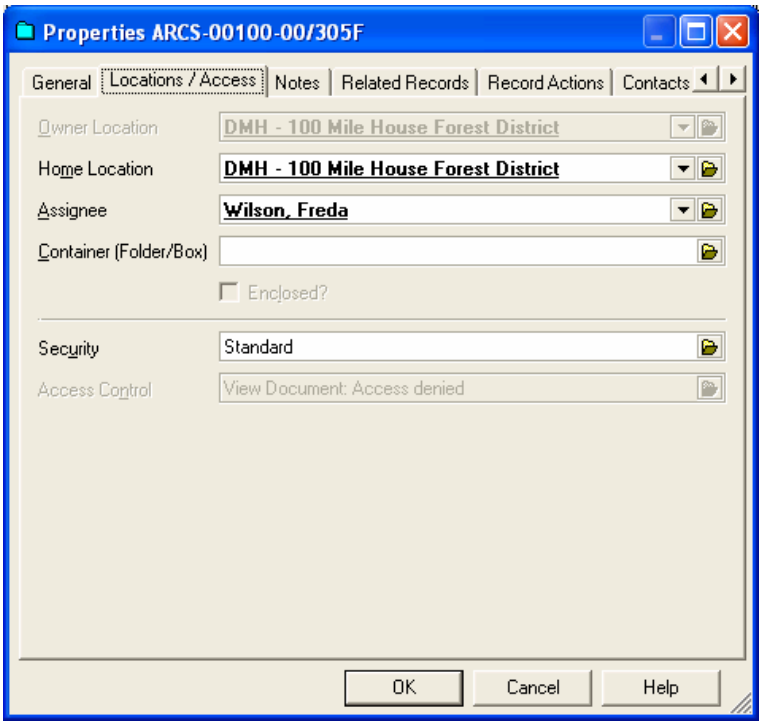
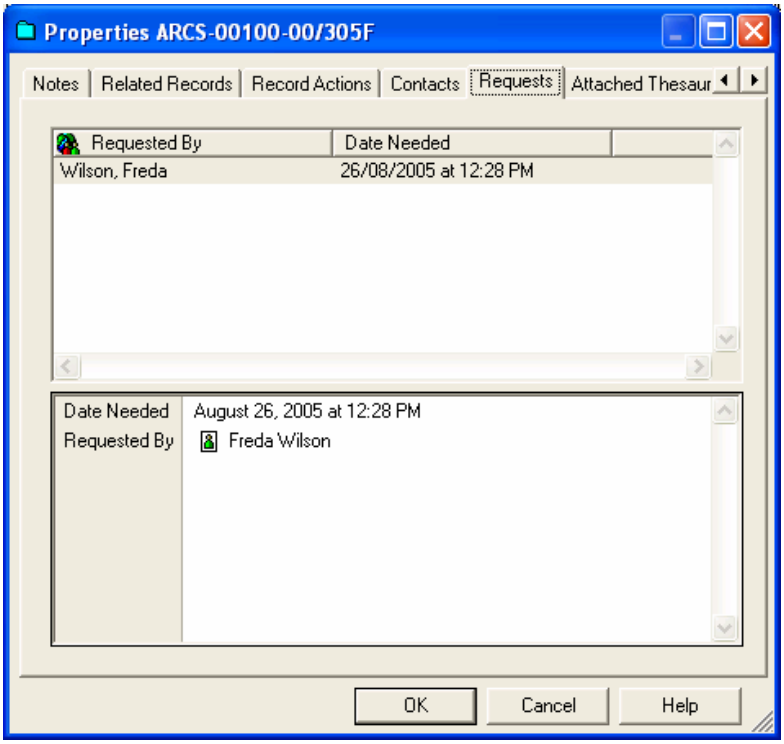


P. Go to the Requests Tab of the file properties to see the entry.



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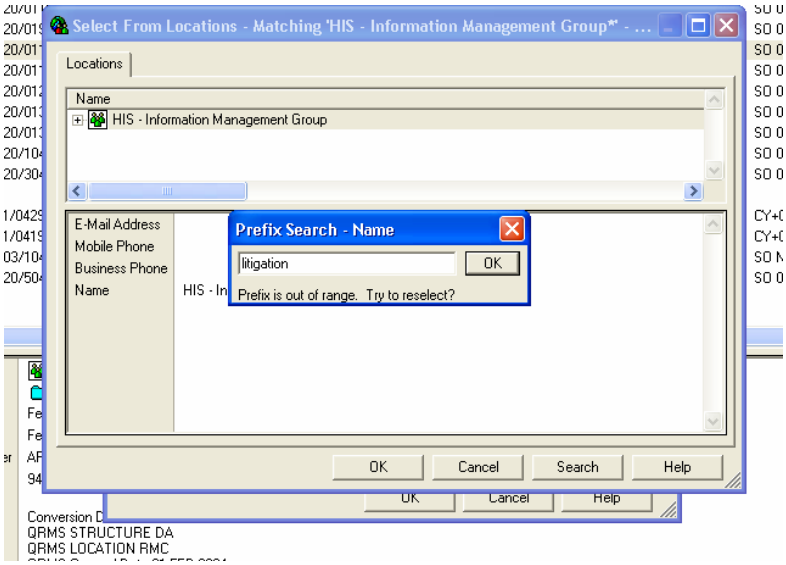
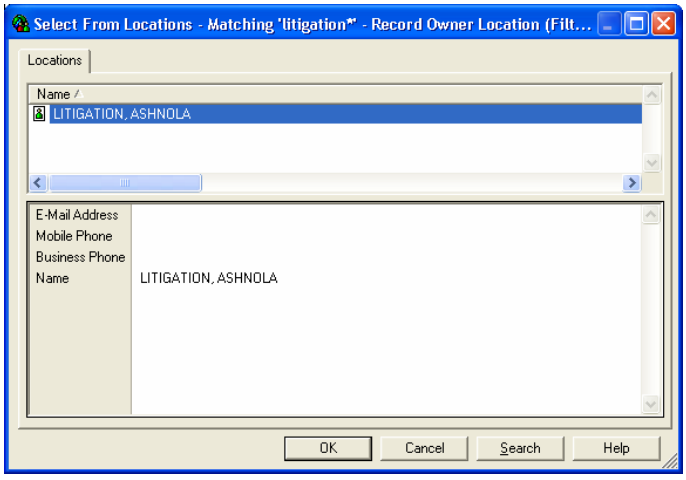
8.3.1 Litigation Requests

Transfer of records to the Litigation Chapter are assigned to one of the special Litigation Locations in TRIM. The location will be **'LITIGATION - XXX'** where XXX is the name of the specific case i.e., **LITIGATION - ASHNOLA**.

A. Search for the record to be transferred to Litigation.
B. Right-click on the record and choose **Properties**
C. Choose the **Locations**/Access tab.
D. Click the KwikSelect button in the Assignee field to Open the **Locations** list.
E. Type Litigation to see the list of Litigation locations.



F. Choose the correct location if there is more than one listed.



G. See the example screenprint below:

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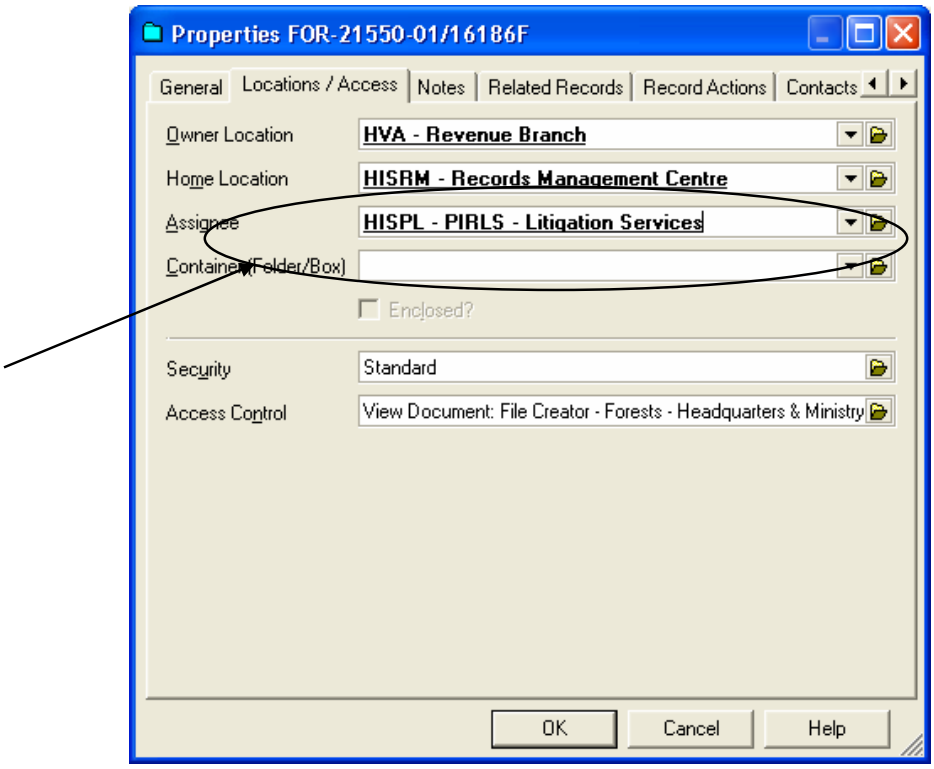

If you receive a request for records and do not see a location appropriate to the Litigation name, contact the Ministry Litigation Coordinator. Also, if the file properties are grayed out and you are unable to change the assignee, it is likely the record has a 'HOLD' on it and in which case you should contact the Ministry Litigation Coordinator.

8.4 How are Record Requests Processed?

Now that you have seen the basic steps to process record requests, try the following exercises for practice.

Exercises - Record Requests

Exercise 1	**Processing a File Folder Request**

This exercise will demonstrate how to process a File Folder request in TRIM Context.
You should be at the main Context screen.

Search for the record you created containing your name in the Title.

1. Right-click on the record and choose **Request** from the short-cut menu
2. Click *OK* to open the Record Request Dialogue Box.
3. The **Requested By** field should show your name.
4. To change your name to the requestor, click the **KwikSelect** button next to this field to search for the requestor in the Locations list.
5. Click the **Search** button to open the Search dialogue box.
6. Type the full name or partial name of the requestor followed by the * and click *OK*.
7. Click *OK* again to confirm.

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Reminder: *A Search value 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 * otherwise TRIM looks for an exact match of the search criteria entered.*

Exercise 2 Processing a File Folder Request

Complete the exercise below to process a File Folder request based on the steps learned in the previous exercise.

1. You should be at the main Context screen.
2. Search for a record containing **Regional** in the Title Word
3. Process the request to check out the file to another Assignee.

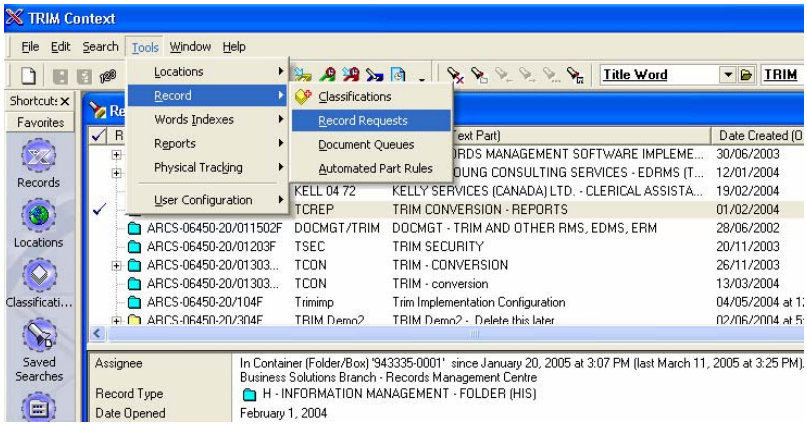
8.5 How Do I Find Records that are Due Back?

TRIM Context allows users with a certain level of access in the dataset to search for Records requested by users. This allows Administrators to locate and dispatch these requested Records to the users requesting them.

This Report lists Records that have Requests or Resubmits placed upon them by the nominated person. Enter a request date range to list requests that were made within a given period of time.

The basic steps to process record requests are:

A. Click the **Record** Requests button on the RMC Toolbar, or Select **Tools|Record>Record Requests** from the Main Menu in TRIM Context.



B. An empty Search Results screen will be displayed if there are no record requests for the current date in which case you can press [**F7**] to refine the search. If there are record requests TRIM will list them on the screen.

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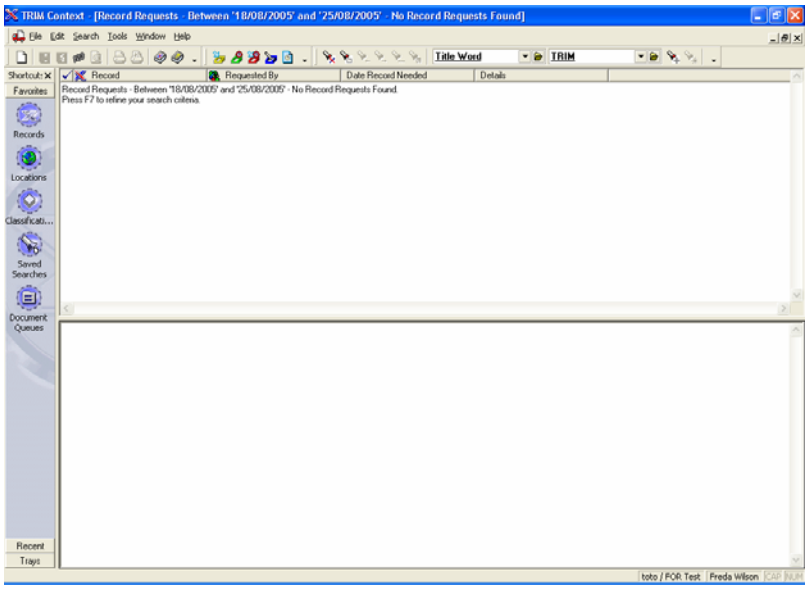
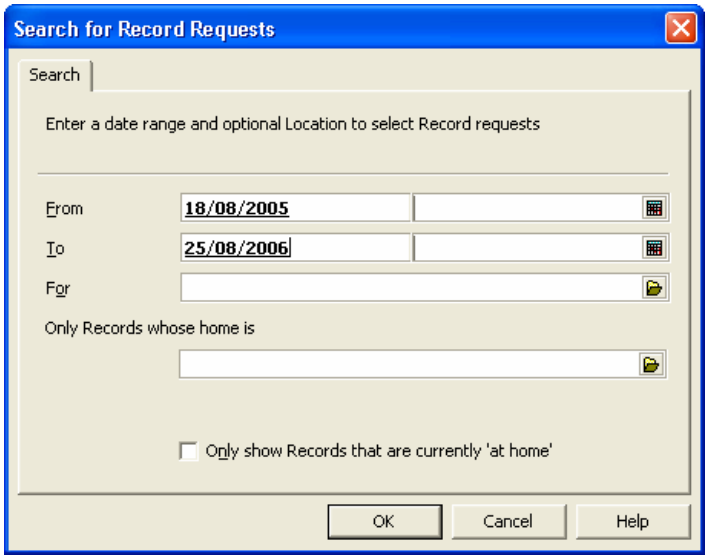


C. Press **[F7]** to invoke the Search for Record Requests Dialogue Box



D. Enter a date range. This can be done by clicking the calendar button and selecting a date or manually typing in the date.

E. Type in the Location you wish to search for, or click the KwikSelect button and choose from the list of locations.

   You can also restrict the search to those records that have a specific home location. As well, you can choose to select records that are currently located 'at home'.

F. Click *OK* to begin the search when you have finished entering the criteria.

   If record requests are found, TRIM will return the results.

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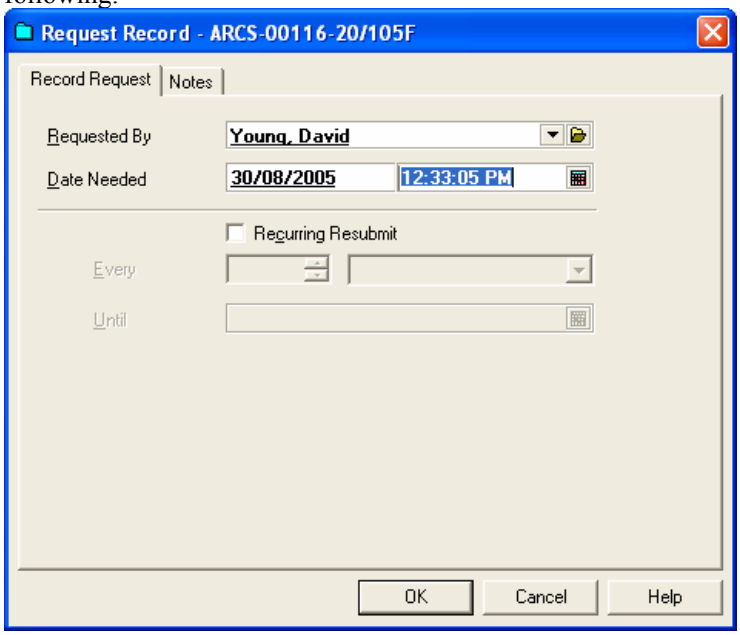
G. You can tag the requests found and send them to a report for printing and follow-up.

Note: The record requests listed are not the records themselves so you cannot see the file properties from this screen.

If you double-click on one of the requests you will see a dialogue box similar to the following:



8.6 Removing a Request

Once a record has been returned the request can be removed from the record. To do this, follow the steps below:

A. Search for the record or records that have been returned.

B. Tag the record(s) and right-click and choose **Remove Record Request** from the shortcut menu.

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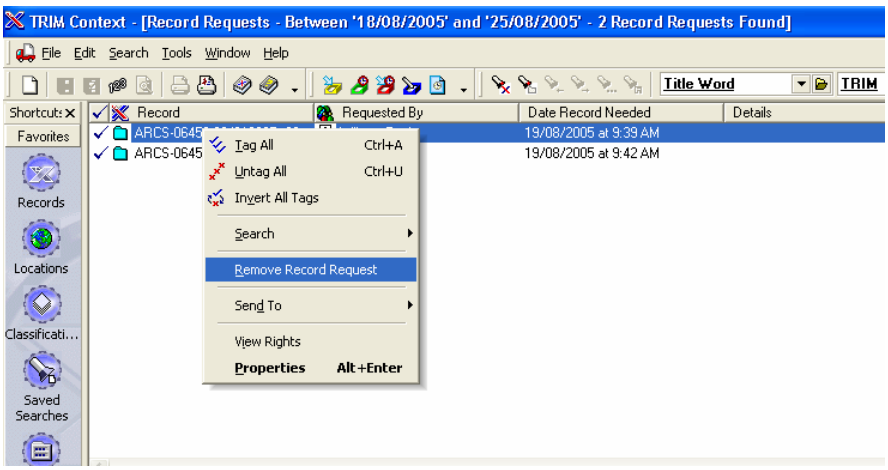
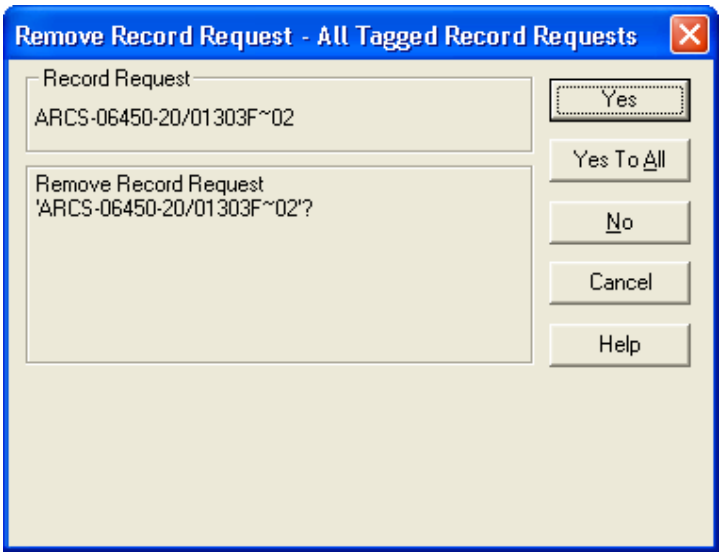


C. Click *OK* to confirm all tagged records.

D. Click **Yes to All** on the Remove Record Request dialogue box.



E. The Record Requests will be removed.

F. Right-click on the **Properties** of one of the records

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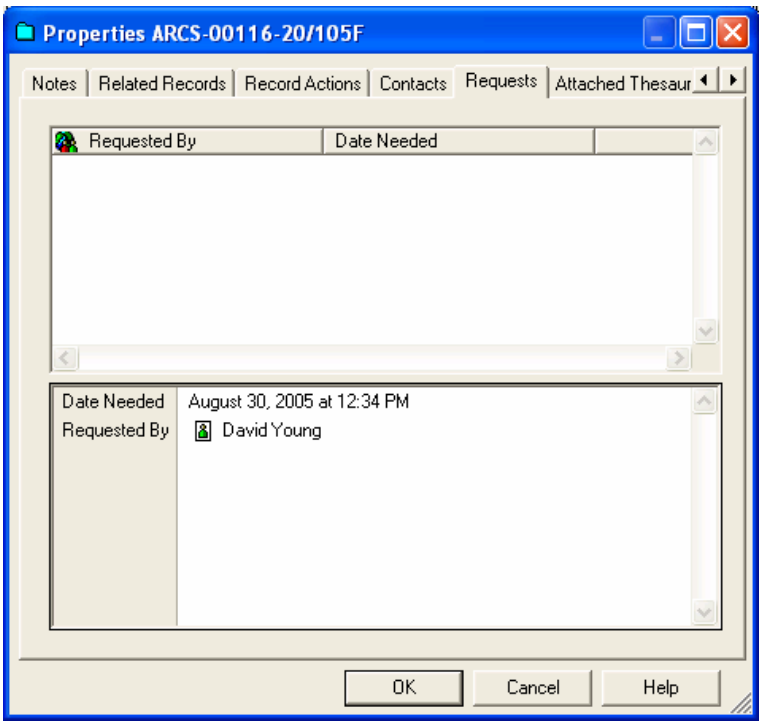
G. Click the **Requests** tab and the Record Request should be removed.



H. Click *OK* to close this screen.

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8.7 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. How is a record request submitted in TRIM?

   _____

   _____

   _____

2. A record can only be requested once.
   a. True
   b. False

3. How are record requests processed?

   _____

   _____

   _____

4. Explain how a record request is removed once a record is returned.

   _____

   _____

   _____

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

   _____

   _____

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8.8 Summary

In this Chapter you learned how to:

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

You should now be able to perform record request functions in TRIM Context.

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9. Record Maintenance

An Information Worker has permission to make certain modifications to records as well as perform some maintenance functions in TRIM Context. These include creating new parts to a file as the previous parts become too large as well as relating records and managing missing files.

9.1 Objectives

In this chapter you will learn how to:

1. Create a New Part to a File.
2. Manage Missing Files.
3. Transfer Files to External and Internal Organizational Units.
4. Make a TRIM Reference.
5. Maintain SO Files.
6. Rollover CY and FY files from Current Year to New Year.
7. Close a File.
8. Search for Record Holds.

Following completion of this chapter you will understand and know how to perform the above functions in TRIM Context.

9.2 How to Create a New Part

When a file becomes too large it is necessary to create a new part to that file. Part is the TRIM term that QRMS users currently know as Volume. TRIM retains the existing record number but allocates a new part. A relationship will automatically occur linking the parts together.

Note: You can only add a new part to an open file. If the file is closed, you cannot add a new part. If you want to add a new part to a closed file contact the Records Management Unit.

To create a new Part to a file, you need to:

A. Search for the existing file for which you need to create a new part.

B. Right-click the file and choose **New>New Part** from the shortcut menu.

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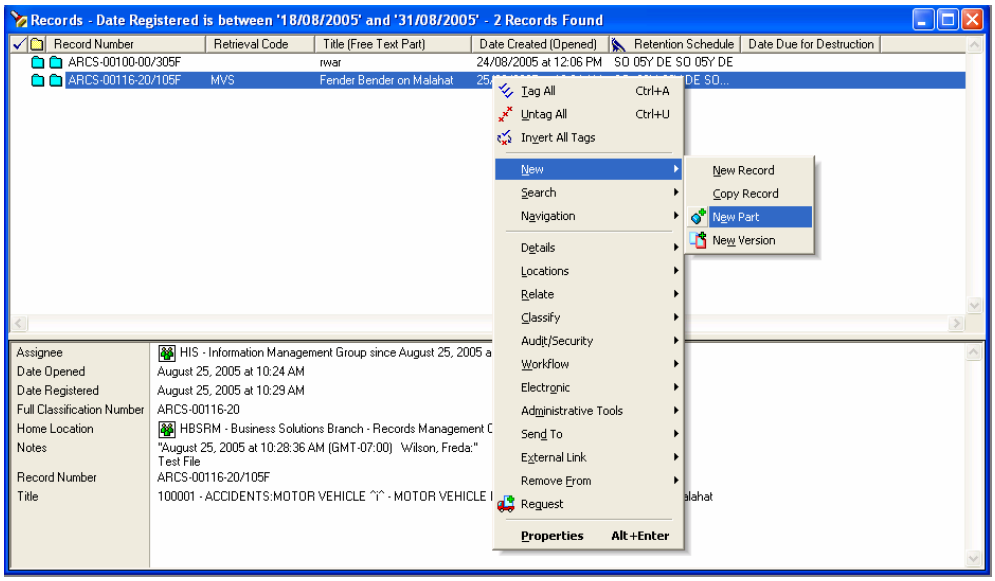
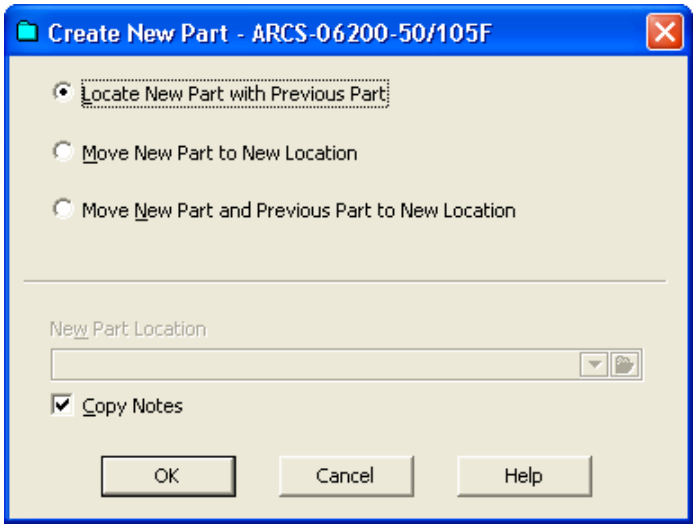
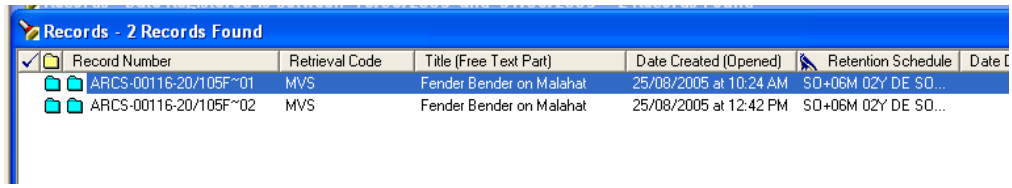


The following Dialogue Box will appear:



C. Click *OK* to accept the defaults of Locate New Part with Previous Part, Copy Notes and create the new Part.

TRIM will automatically close the previous part by adding a Date Closed and will prevent further records from being added to that file. The record with the new part will be displayed on the screen.



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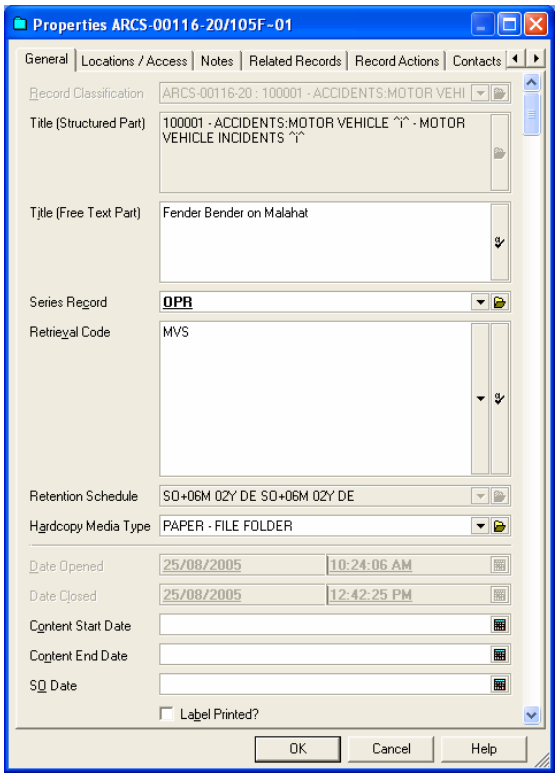
D. The screen will display the new Part record.

E. Press [**F7**] to refine the existing search and click OK to search for the same criteria.

F. Click on the Record Number column heading to sort the records by Record Number. You will see the record with the Old and New Parts listed as shown in the following screenprint.

G. Locate Part 01 of the new record and check the Date File Closed field on the General Tab properties. TRIM enters this date and time when a new part is created.



H. Click **Cancel** to close this record.

9.3 How to Manage Missing Records

TRIM provides the functionality to search for Missing Records. This function is simply a preset Location entry that allows you to flag records as Missing and then search for any records flagged as Missing.

9.3.1 How to Mark a Record as Missing

Follow these steps to flag a record as missing:

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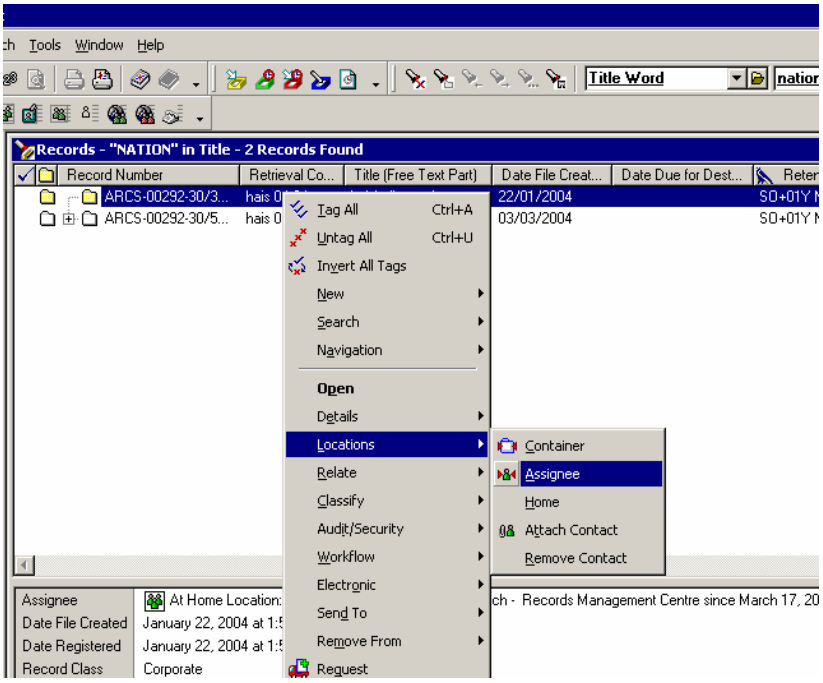
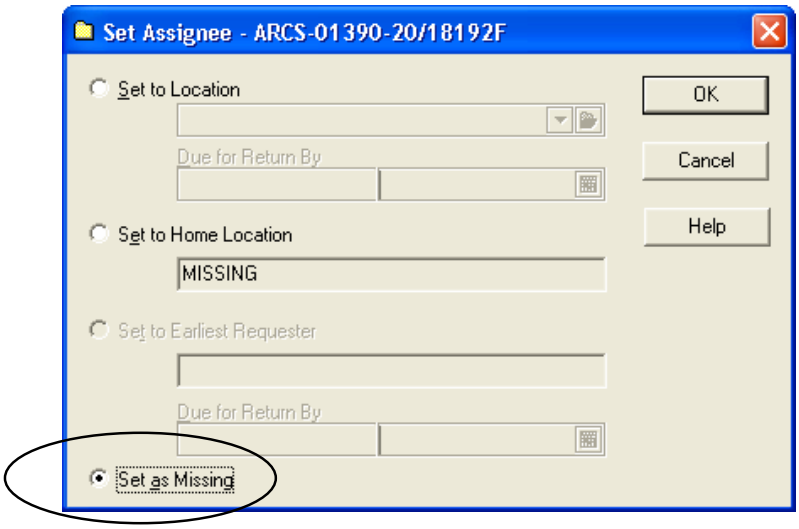
A. Search for the Record(s) you wish to mark as Missing

B. Right-click on the Record (or tag the Records and right-click) and select **Locations>Assignee** from the short-cut menu. The Current Location dialogue box will display.



C. Check the **Set as Missing** checkbox. This will set the record's Assignee Location as Missing.



D. Click *OK* to confirm and return to the search results screen.

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9.3.2 How to Add Material to a Missing File

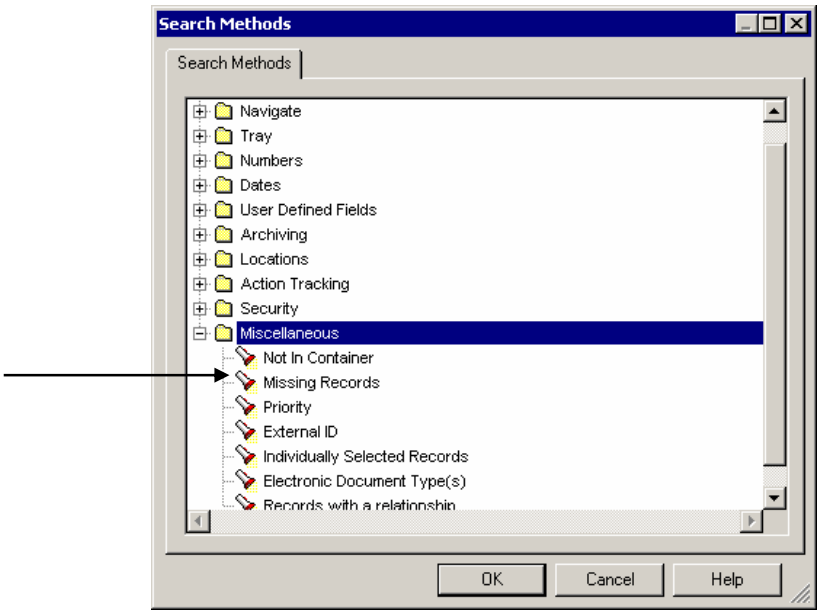
If you have material to add to a missing file, open a **new part** to accommodate the material. This will close the **Missing Part** and allow the **new part** to be used for filing new material. Use the **Content Start Date** to record the earliest date of the material being added to the new part.

9.3.3 How to Search for a Missing Record(s)

To search for a missing record(s):

A. Click the Find Records button on the toolbar and click the **KwikSelect** button to display the list of Search Methods

B. Expand the **Miscellaneous** category (click on the plus sign to open the category) and select **Missing Records**.



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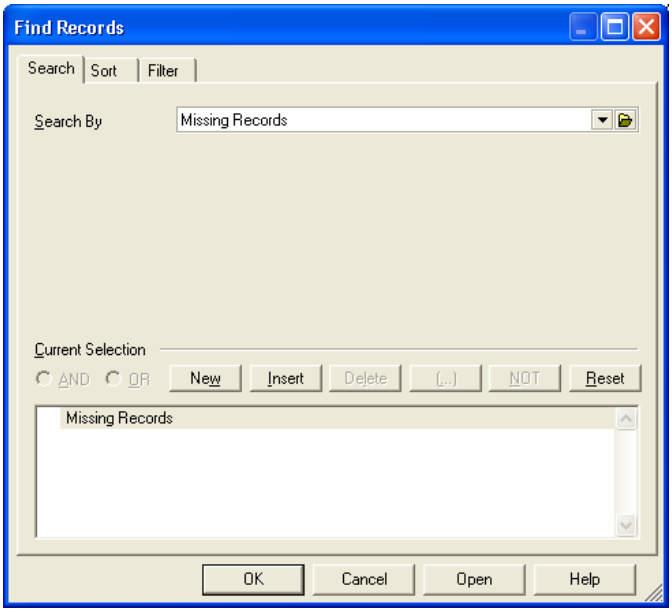
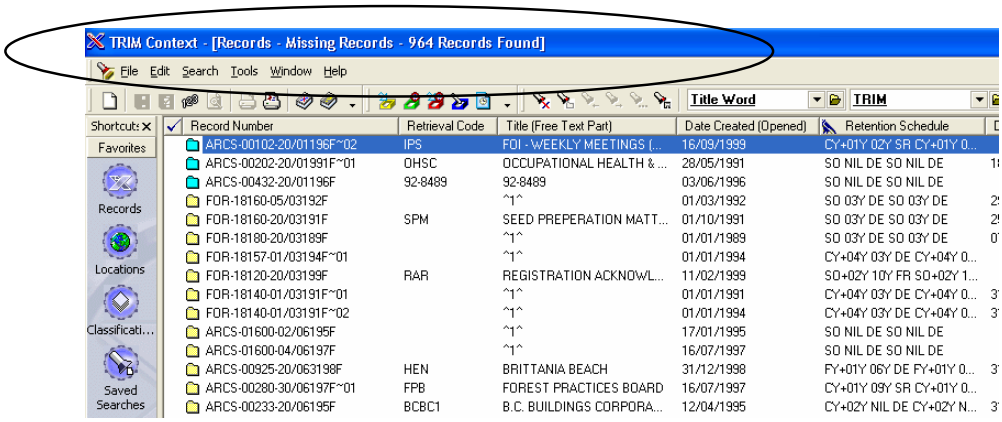
C. There are no criteria necessary for a Missing Record search.



D. Click *OK* to commence the search or you may wish to add new rows to the search (for example: you may add a row to restrict the search to a particular Owner or Home Location).



9.4 How to Create Box for OnSite Storage

Some offices store active records in boxes for space considerations, usually in a separate storage room or facility. Records stored in this fashion will be re-boxed for off-site transfer.

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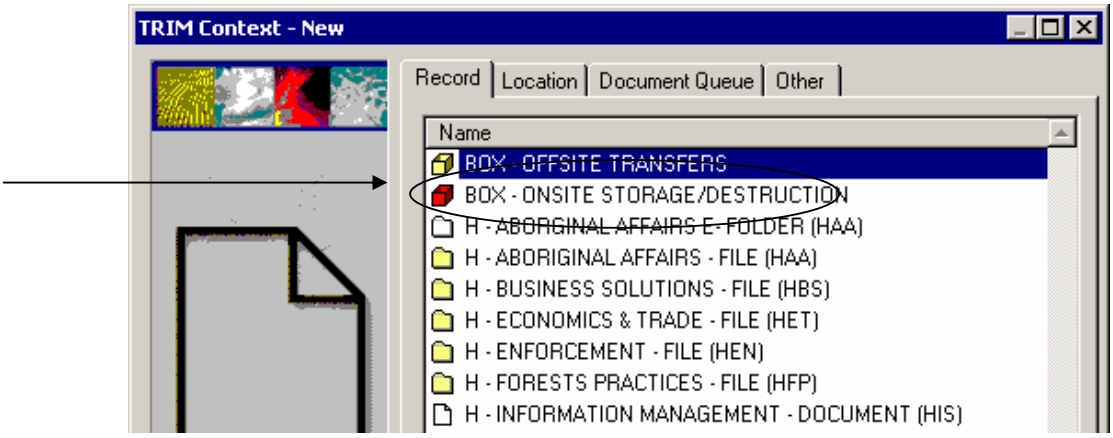
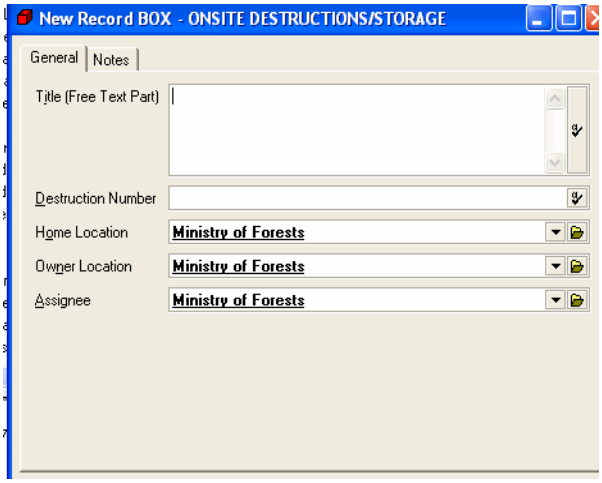
A. Create a New Record



B. Select **BOX – ONSITE TRANSFERS** Record Type

Click *OK* and the following dialogue box will appear:



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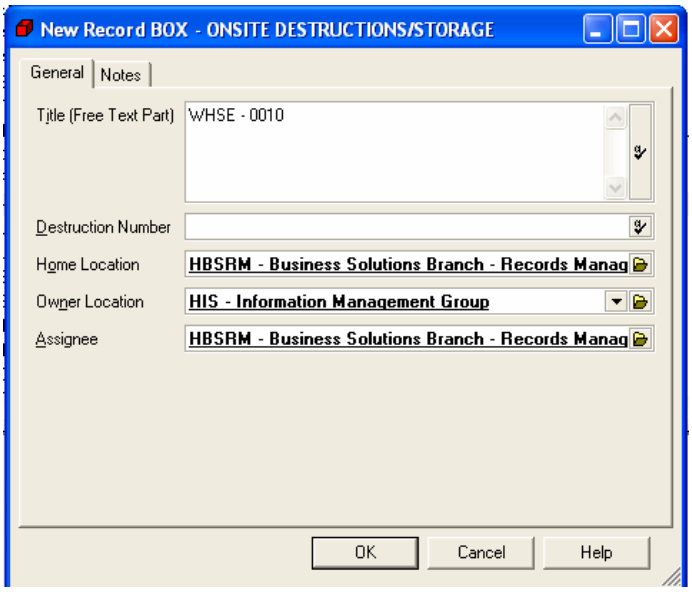


A. The **Destruction Number** is not currently used.

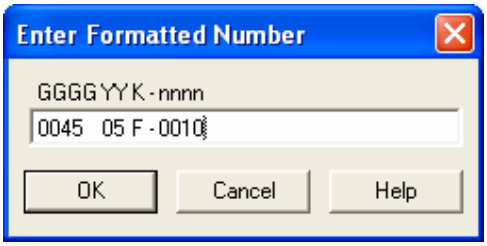
B. The **Home** Location = the location **where the boxes are stored**

C. The **Owner** Location = the **originating Branch**.

D. The Assignee Location = Ministry of Forests.

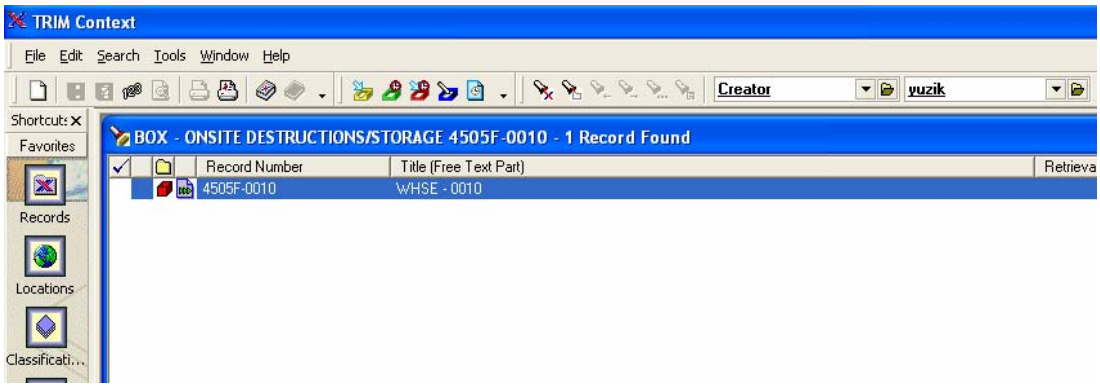
E. Click the **Notes Tab** and enter any applicable information in this screen.

F. Click OK and the following screen comes up



This is the system generated number assigned to the box – you can change the "nnnn" to reflect the individual box number you are creating.

G. Click OK and the record is created and displayed



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9.5 How to Transfer Records to an External Location

There will be occasions when it is necessary to transfer records to other organizational units external to the Ministry. For example, this may be as a result of a reorganization or when legal custody changes. To transfer records to another organization also requires that this organization be an existing TRIM Location.

Note: This is not a temporary loan or charge-out, but a permanent transfer of legal custody.

For information on transferring records to BC Archives, refer to the Disposition Management Chapter.

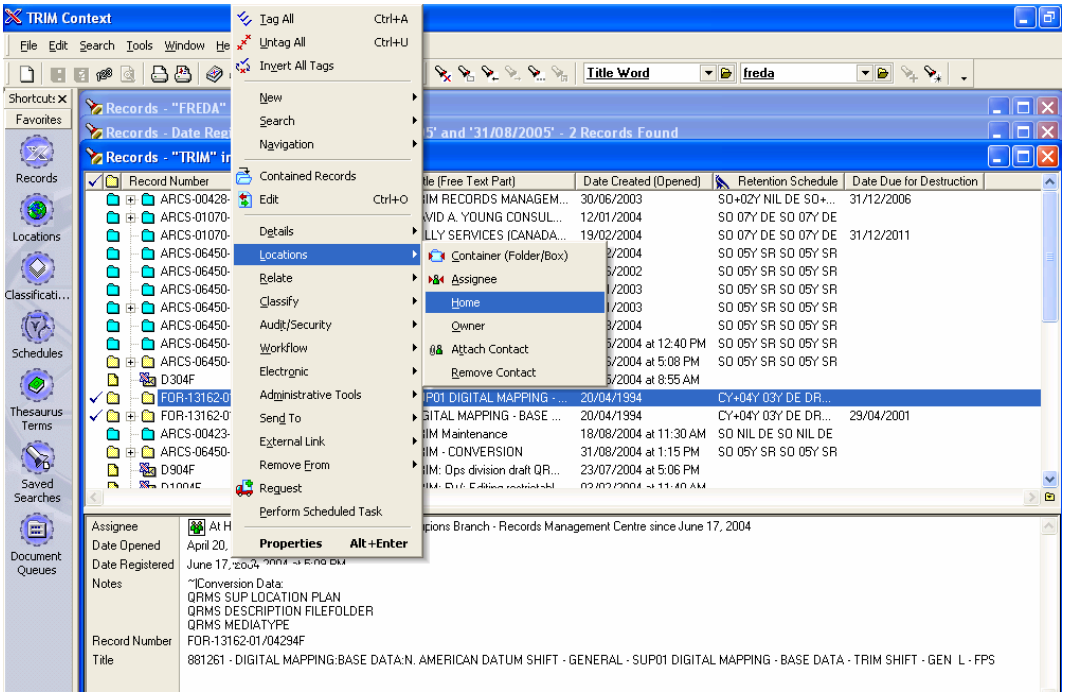
Important: For transfers to the Litigation Chapter, see Chapter 8.3.l Litigation Requests.

Note: When records are being transferred to an external organization you must notify the Records Management Unit to change the disposition. You can create what is called a TRIM Reference and send this to the RMU. The TRIM Reference is a pointer or shortcut similar to a link to a website. It points to the records that need to be transferred. (See Chapter 9.6 on how to make a TRIM Reference.)

The steps to transfer records to another organization basically involve performing a 'Search, Tag and Do' function as follows:

A. Search for the records in TRIM that are to be transferred.

B. Tag the records for transfer.



C. Right-click and choose **Locations>Home.**

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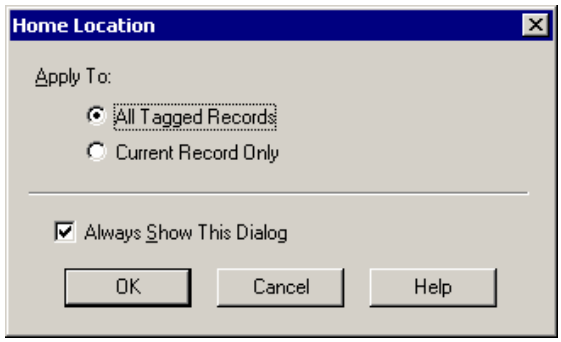
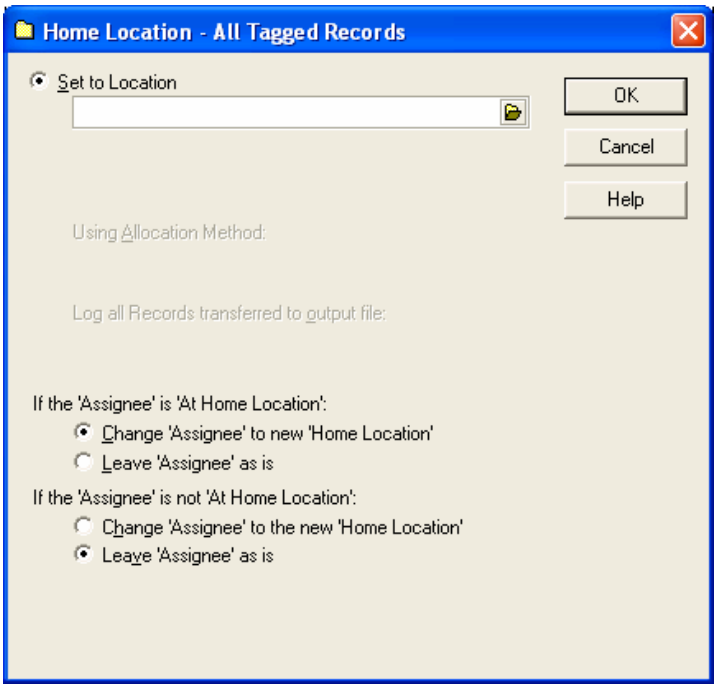


D. Click *OK* to confirm all tagged records.

E. Click the **KwikSelect** button in the **Set to Location** field to open the Locations List.



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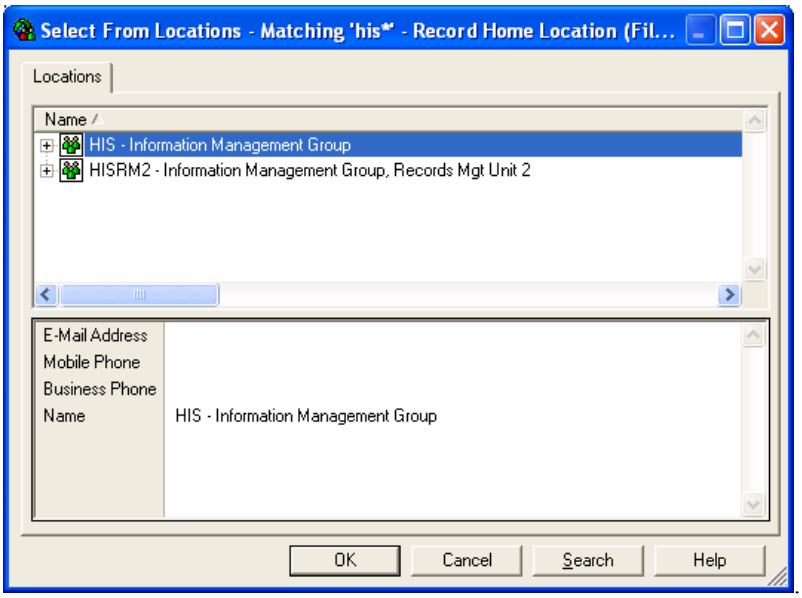
F. Select the appropriate **Home Location** from the Locations List.



G. Click *OK* to submit the change.

H. Click **Yes to All** to change the Home Location on the tagged records.

9.6 How to Transfer Records to an Internal Location

It may be necessary to transfer records to another organizational unit within the Ministry. To transfer records to another unit in the Ministry also requires that this organization be an existing TRIM Location.

Note: When records are being transferred to an internal organization you must notify the Records Management Unit to change the record type. You can create what is called a TRIM Reference and send this to the RMU. The TRIM Reference is a pointer or shortcut similar to a link to a website. It points to the records that need to be transferred. (See Chapter 8.6 on how to make a TRIM Reference.)

The steps to transfer records to another internal organization basically involve performing a 'Search, Tag and Do' function as follows:

I. Search for the records in TRIM that are to be transferred.

J. Tag the records for transfer.

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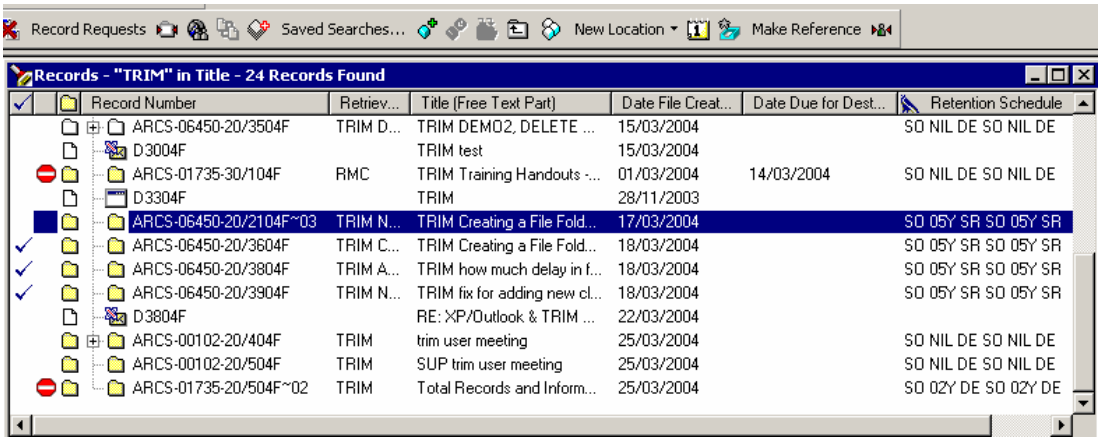
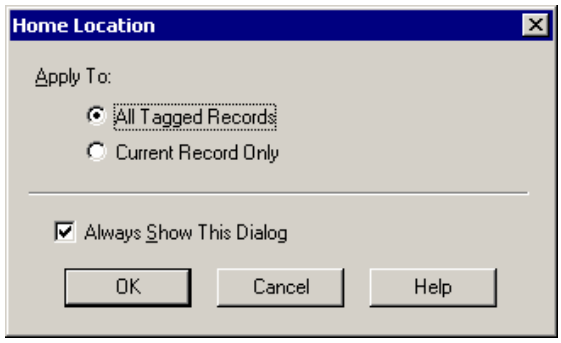


K. Right-click and choose **Locations>Home.**

L. Click *OK* to confirm all tagged records.



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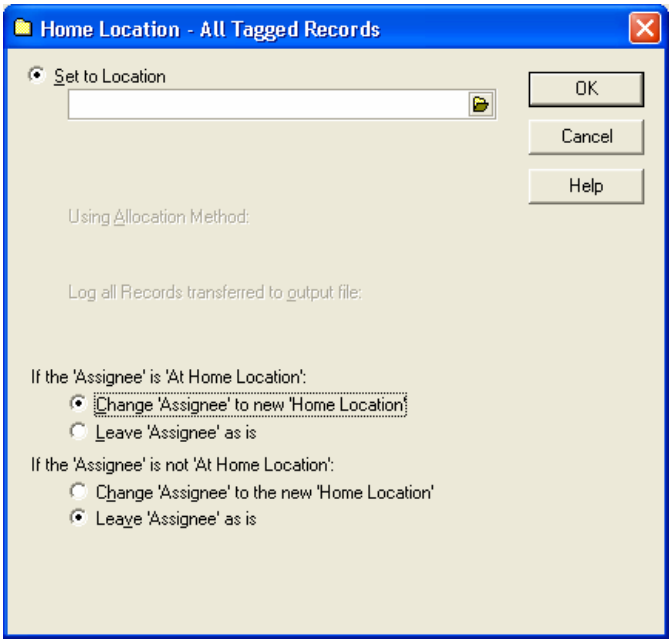
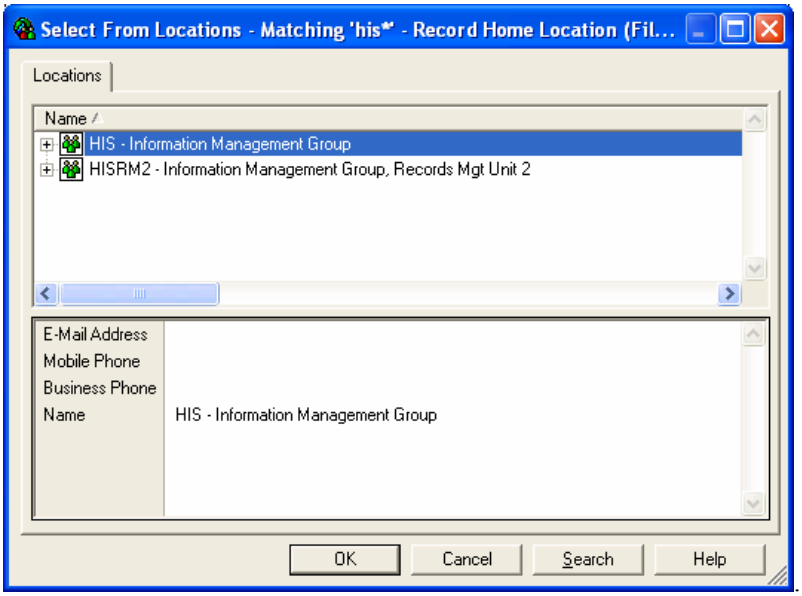
M. Click the **KwikSelect** button to open the Locations List.



N. Select the appropriate **Home Location** from the Locations List.



O. Click *OK* to select the highlighted branch.

P. Click *OK* to set the new Home Location.

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Q. Click **Yes to All** to change the Home Location on the tagged records.

9.7 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**.

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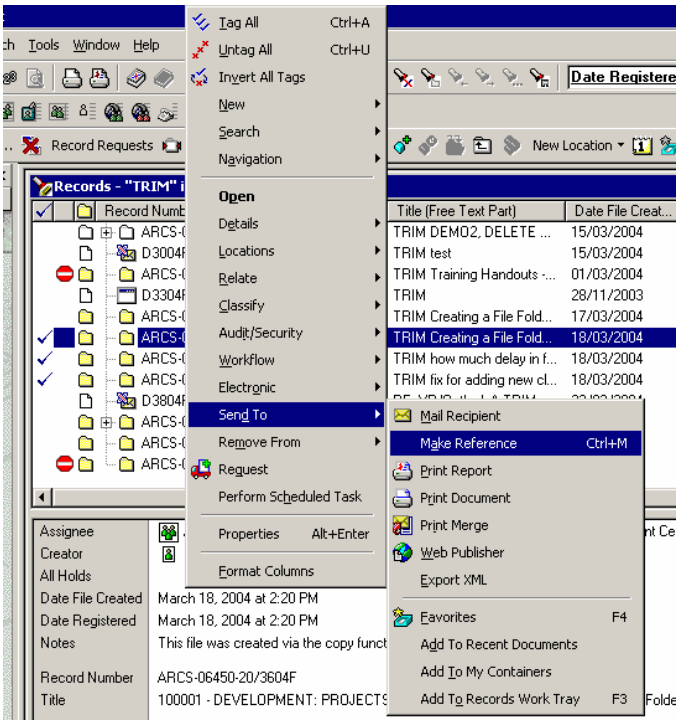
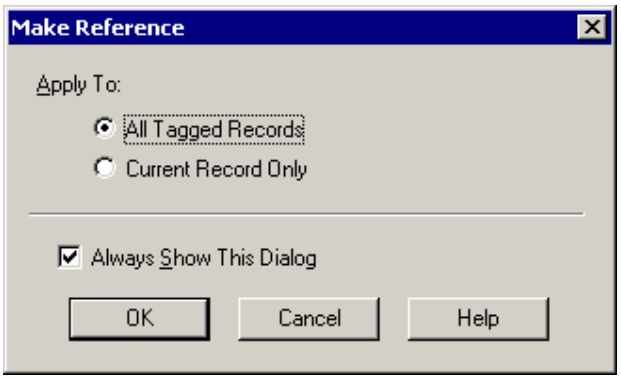
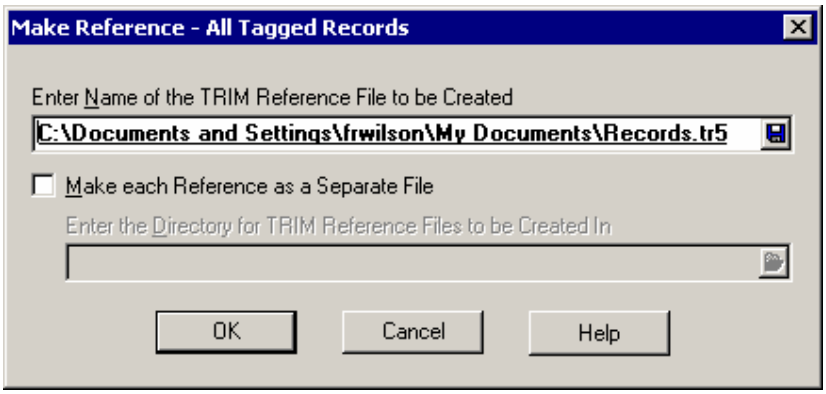


You will see the following dialogue box appear:



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



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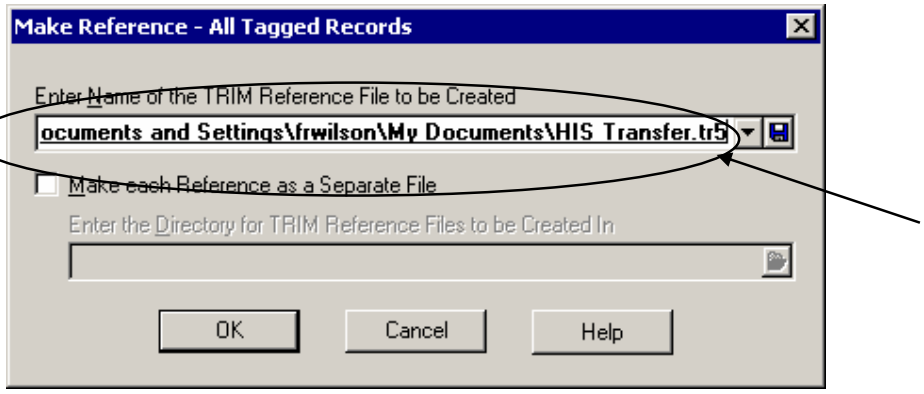
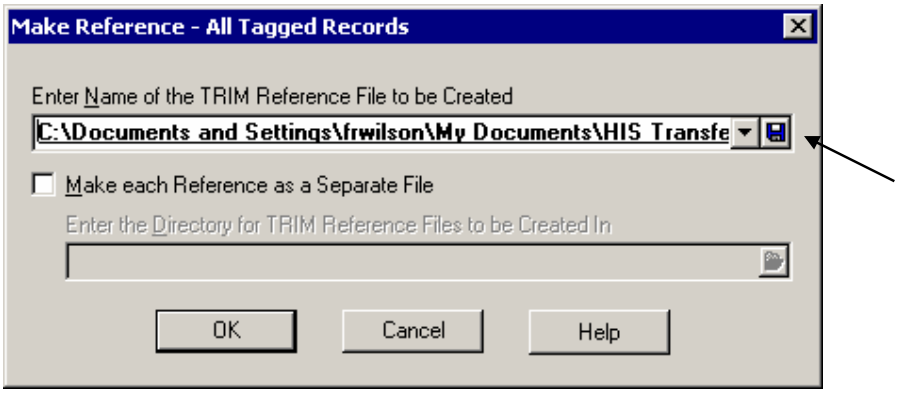
You can choose to make each reference a separate file or accept the default of one reference for all the files. TRIM automatically will name the file **Records.tr5** as the name of the TRIM Reference file.

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.

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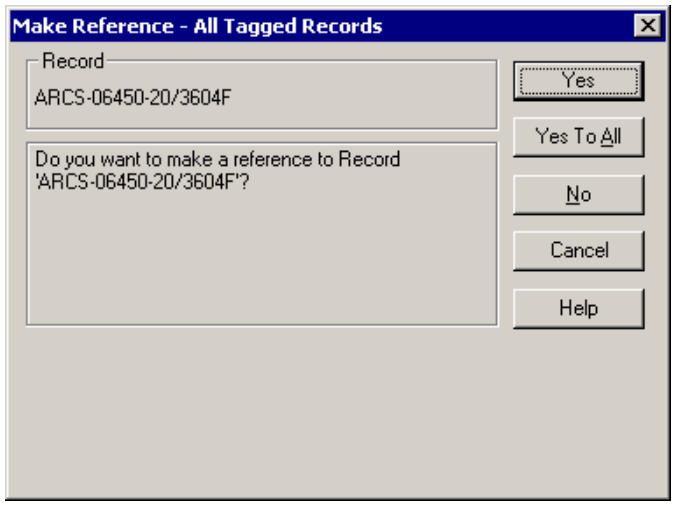
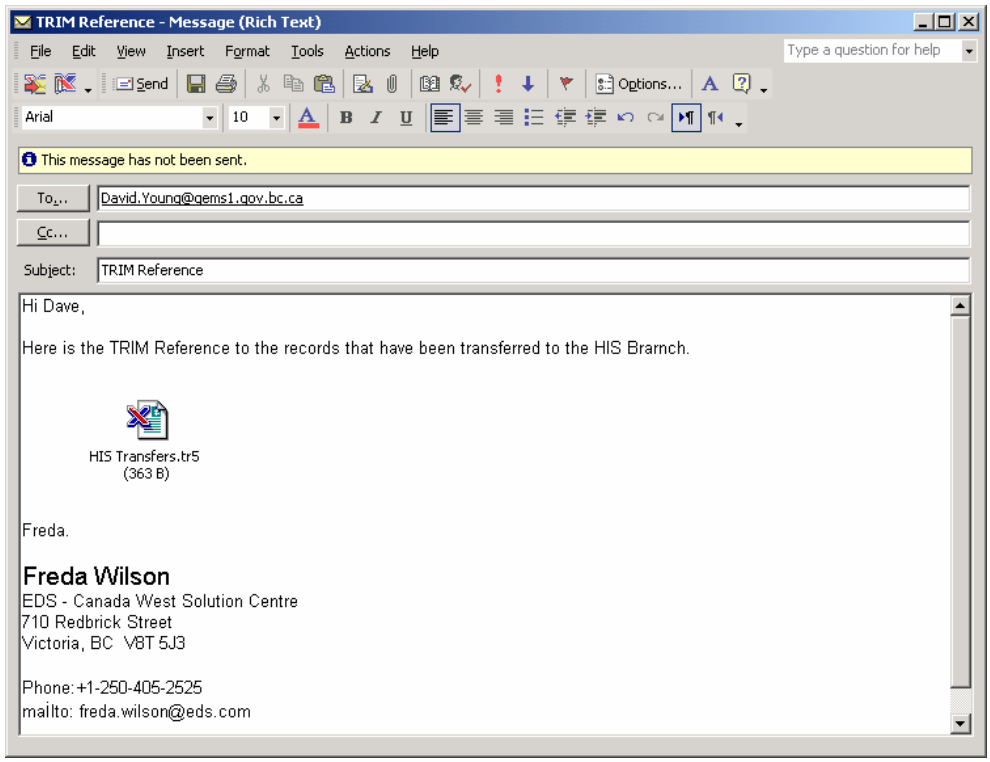


F. Click **Yes to All** to make a reference to all tagged records.

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:

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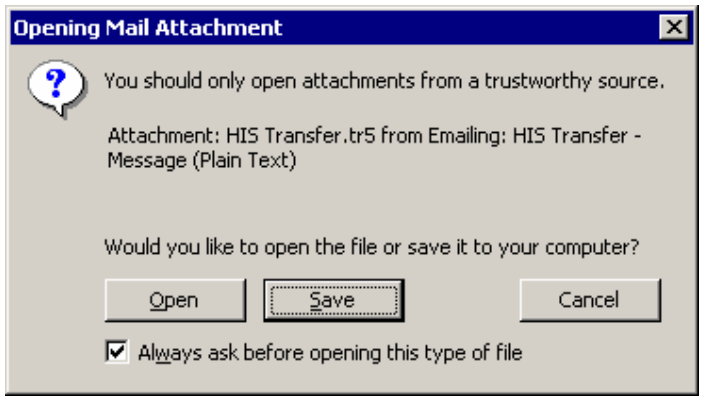
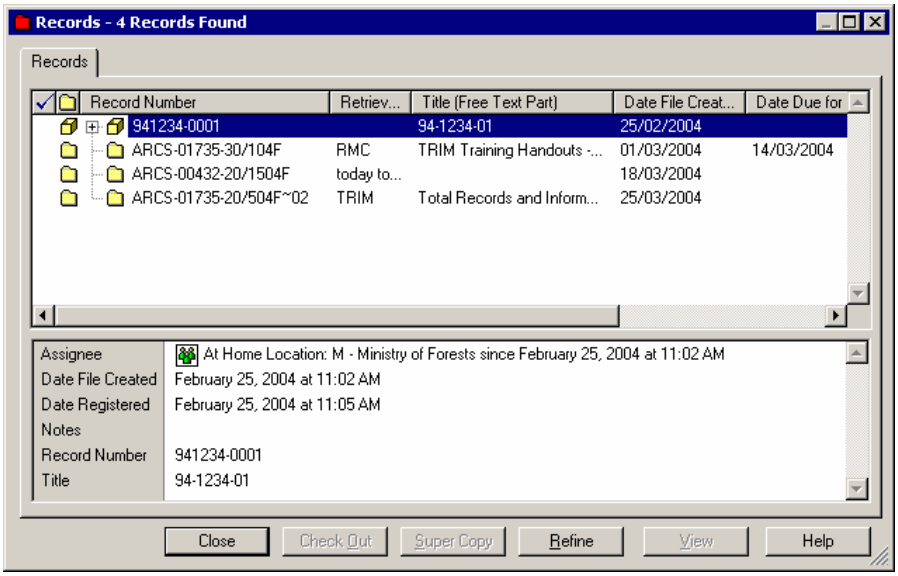


I. You can choose to open the reference or save it to disk and open from there. Either way, when you click on the file you will see the following search results screen:



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.

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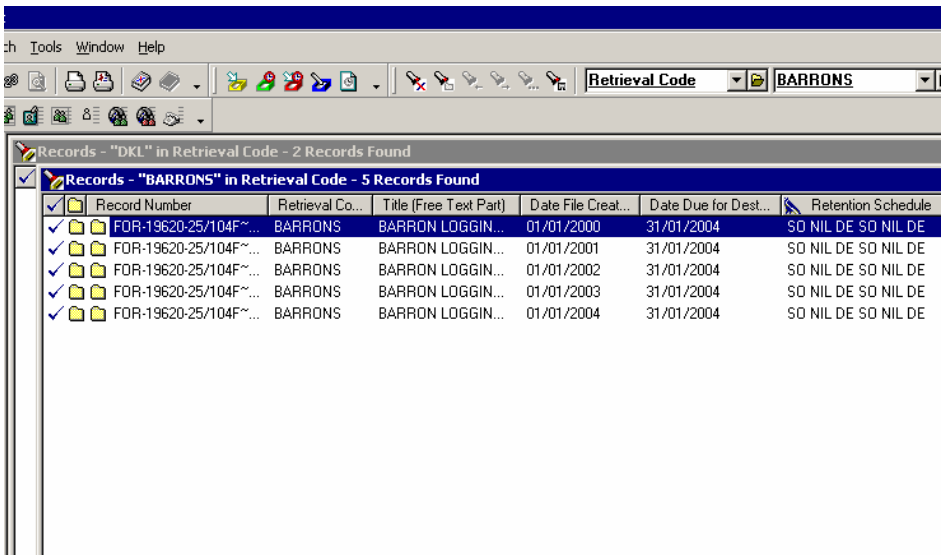
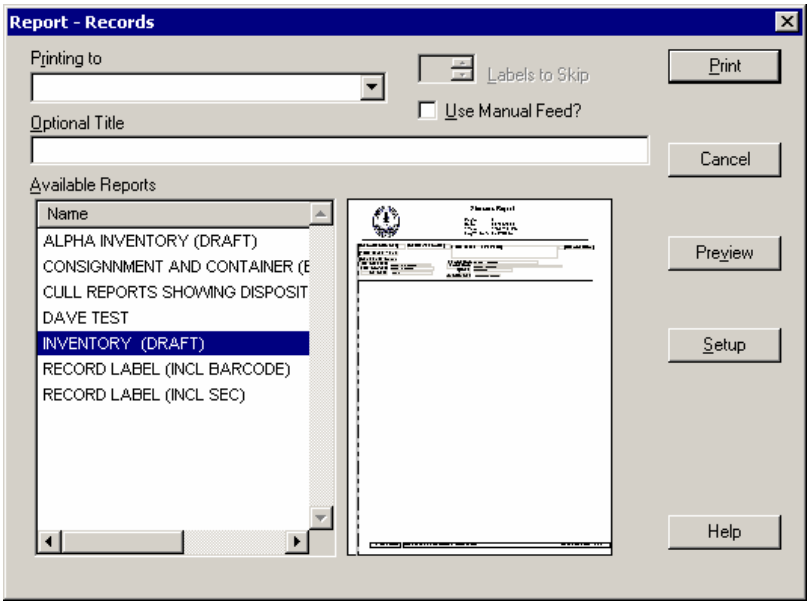


A. Make sure the records are tagged.

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.

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9.8 Maintenance of SO Files

SO files are files whose retention schedule reads "SO…." Their disposition is dependant on a particular action or time period to have been achieved (i.e. the completion of a project or the expiration of an appeal period). The determination of when this SO date has been reached is frequently known only to line ministry staff. Therefore, it is recommended that periodically these files that have remained open for a significant amount of time be reviewed with staff to see if these files can be closed.

The disposition of SO files actually requires two dates be completed - the SO Date and the File Closed Date. The later of these two dates will effect the disposition. In most cases, the File Closed Date and The SO date will be the same, however in some instances there may be a requirement for distinct dates. There are two uses for this:

1. When the SO date has been filled in ahead of time, for example:

   A contract with an expiry date = SO Date
   and an Evaluation follows 1 month after the end of the contract.

2. Disposition = the later of the two dates (SO Date and Closed Date).

> ***Note:*** If material precedes or is subsequent to the File Open/Closed Dates, you can use the Content Start and End Dates to record that information.

The Saved Search **'SO RECORDS to review'** will identify SO records that were opened last year and have either a blank "Closed Date" or "SO date" – remember that both need to be filled in for retention triggers to be activated.

The following table lists the **'SO RECORDS to review'** Saved Search and the steps to be followed by the RMC/Records Custodians for staff to review and supply the closed/SO dates as applicable.

ROLLOVER SEARCHES	RMU Staff	RMC/Records Custodians
TO CONFIRM STATUS OF SO FILES		1. Select Saved Search SO RECORDS to review. The SO files that were opened in the previous year and still open are displayed. This can be done all at once for a specific branch or for selected classifications by refining the search. 2. Select all and print the "SO REVIEW" report 3. Have line staff review the report and supply the closed/SO dates as applicable. 4. Update records in TRIM based on response

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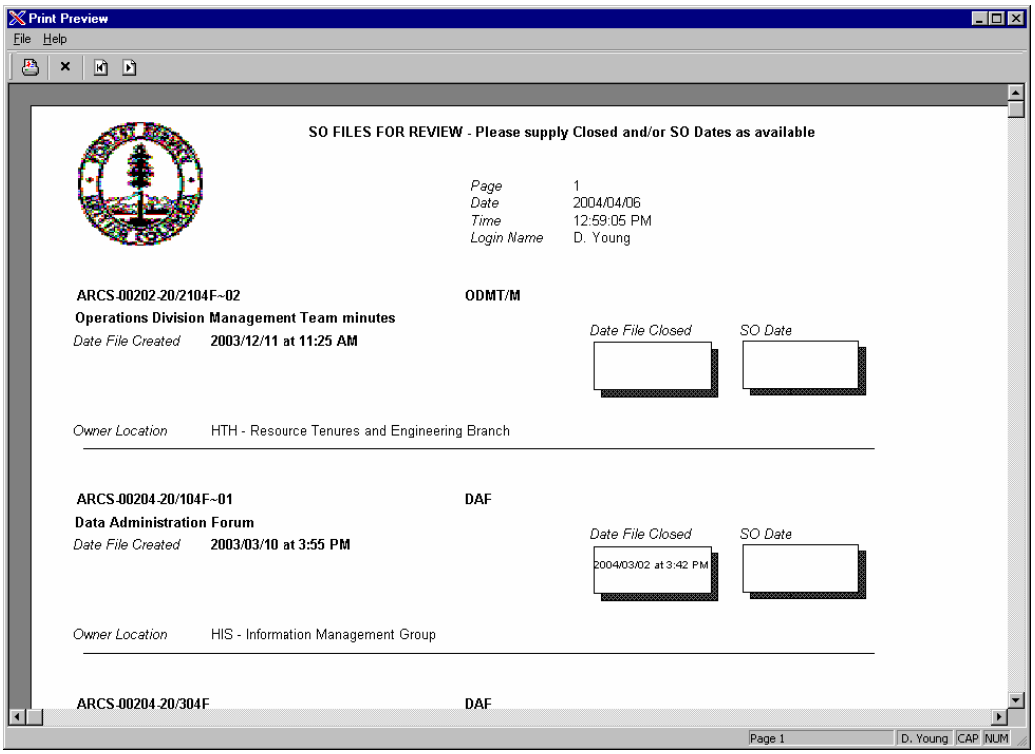
The following screenprint shows a preview of the **SO Files for Review** report.



9.9 CY and FY Rollover Files

Twice a year, at the end of the Calendar Year Dec 31 and the Fiscal Year Mar 31, all files pertaining to those years must be closed and new files opened for the new year. This must be done even if the actual transfer of semi-active files to off-site storage will not occur until later.

This annual process of closing the last year's files and opening new year's files is called **Rollover**.

The closing of the files in TRIM will be done centrally by the RMC/Records Custodians. The RMC/Records Custodians will then print the updated labels and open any new files.

In many cases, files for the new year can be predicted and new files can be made up in anticipation of the new year's material. In other cases, files will be made up when the actual material for the file is received.

The following table lists the **ROLLOVER - CY Files** Saved Searches and the steps to be followed by the RMU Staff and the RMC/Records Custodians when rolling over files from the current calendar year to the new calendar year.

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ROLLOVER SEARCHES	RMU Staff	RMC/Records Custodians
ROLLOVER - CY Files		1. Select Saved Search **ROLLOVER CY FILES**. The CY files that have been opened in the past "Year to Date" and are still open are displayed. This can be done all at once for the entire ministry or branch by branch. 2. Select all and change Close Date to Dec 31 XXXX. This will close all CY Files for the year. 3. Print New Labels showing "File Closed Date" 4. Decide which files need to be opened for the New Year. You may wish to print an inventory report to review with staff to determine which need to be opened in advance. 5. Tag the closed files you wish to open for the new years and right click - select "New" "Copy Record" . 6. Having copied the records, sort by Closed Date to segregate the new files. 7. Update the file titles to reflect the current Calendar Year. 8. Print Labels and make up new files.

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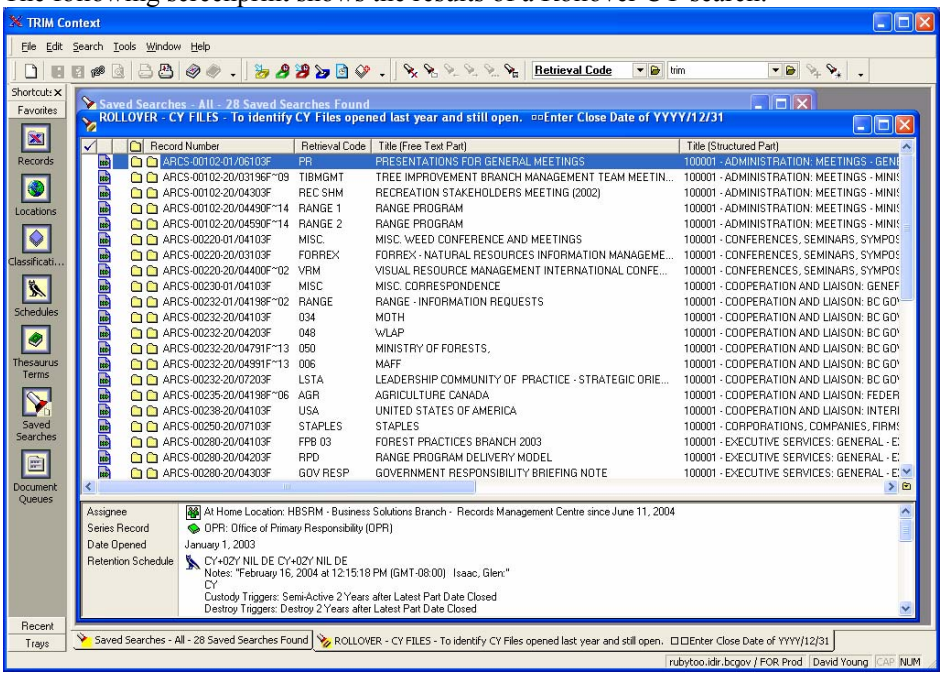
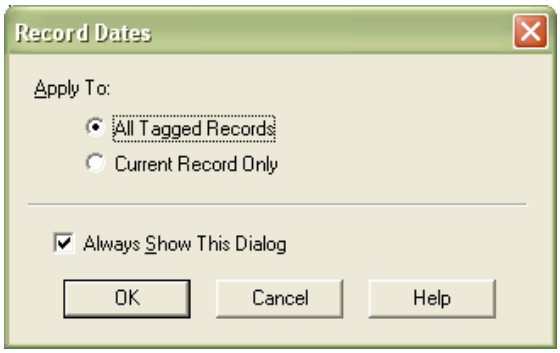
The following screenprint shows the results of a Rollover CY search:



A. After you tag all the records in the search results screen, right-click and choose **Details>Dates**. You will see the following dialogue box:



B. Click *OK*
The following dialogue box will appear:

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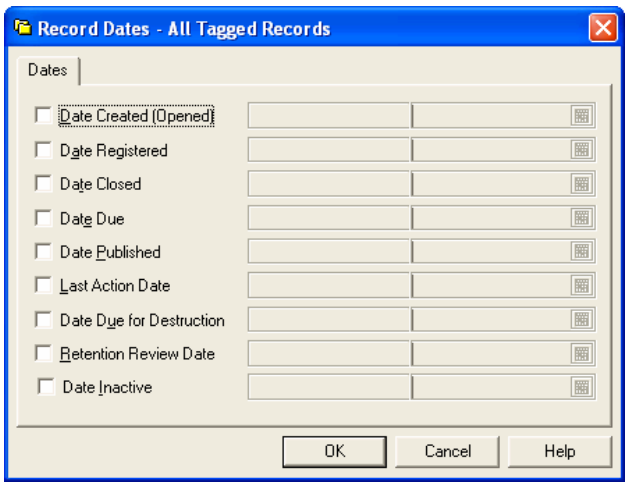

C. Enter Dec. 31 XXXX (type the appropriate year in place of XXXX) under "Date Closed" and click OK to close all the tagged records.

Once these files are closed, you can now copy them to create files for the new calendar year.

D. At the same search results screen with all files tagged, right-click and choose **New>Copy Record** from the short-cut menu. The following dialogue box will appear:

E. Click *OK*.

You will see the following dialogue box:

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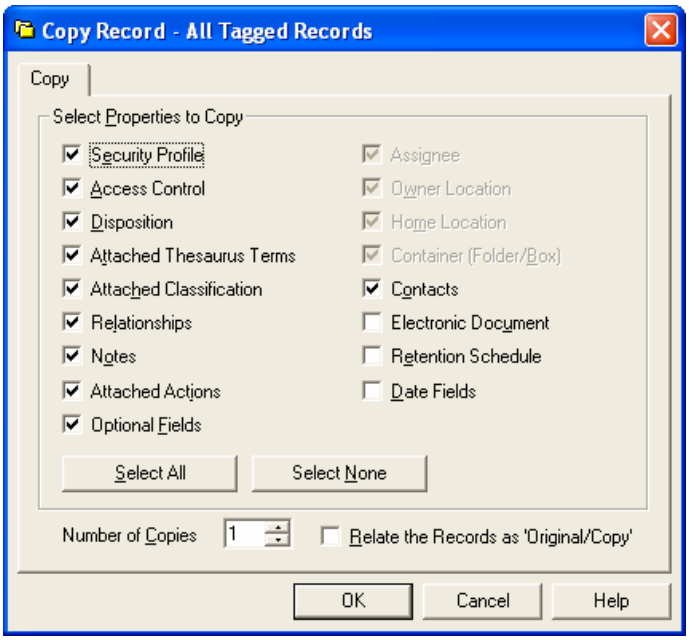
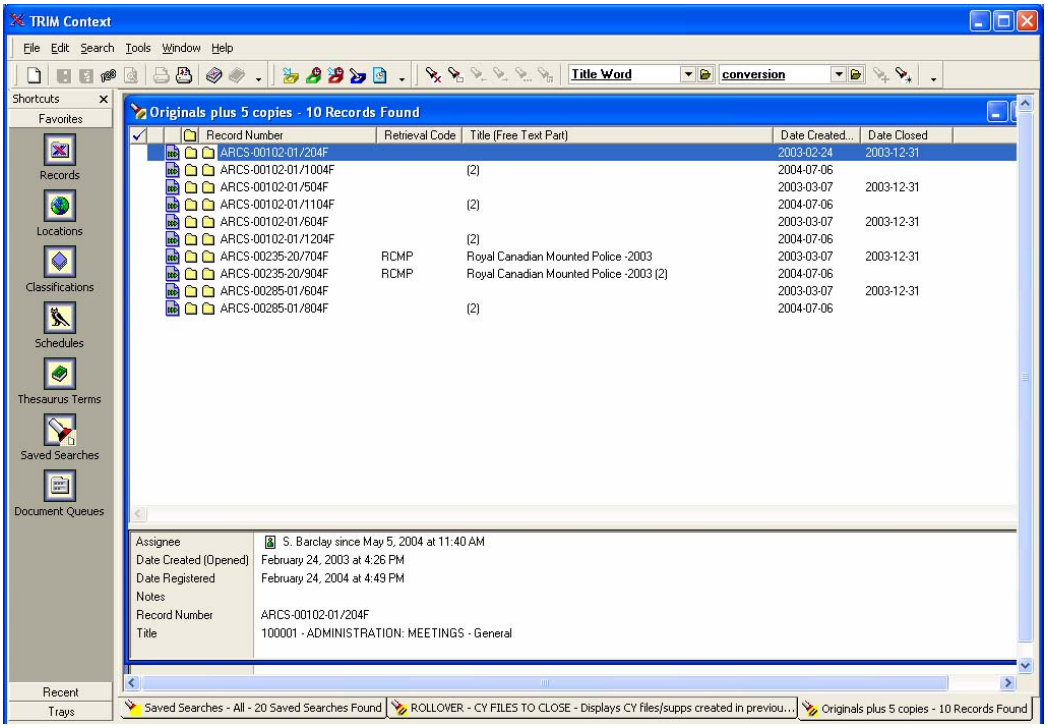


F. Select or deselect the file properties you wish to copy over and then click *OK* to create the new records.

The following screenprint shows the results of the file copy process:



You can sort the results by Date Closed as in the following screenprint:

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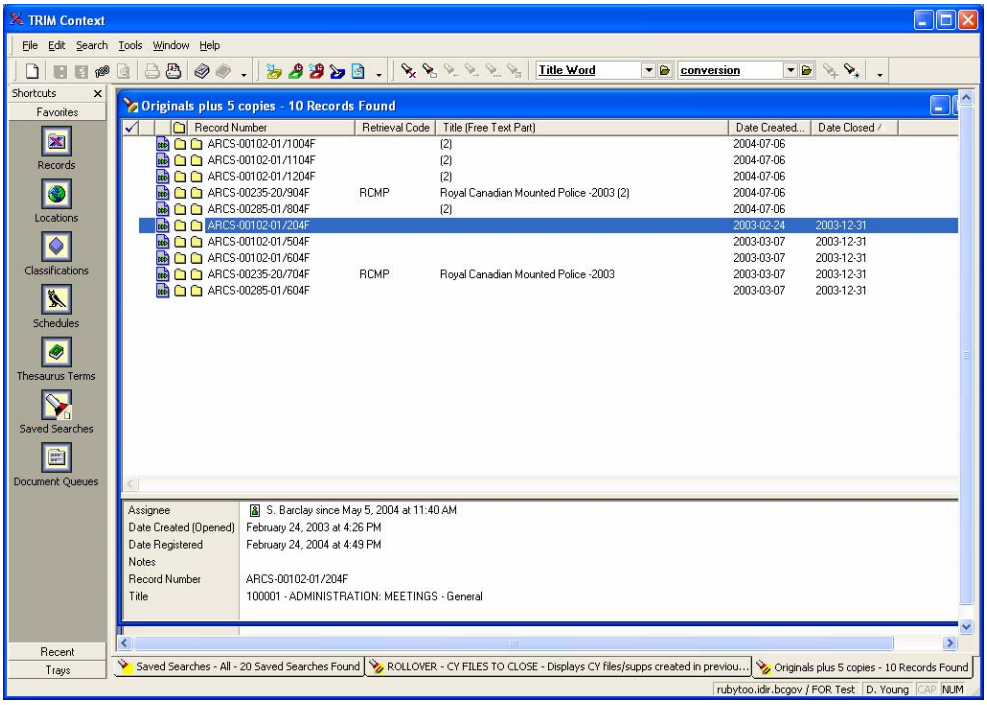
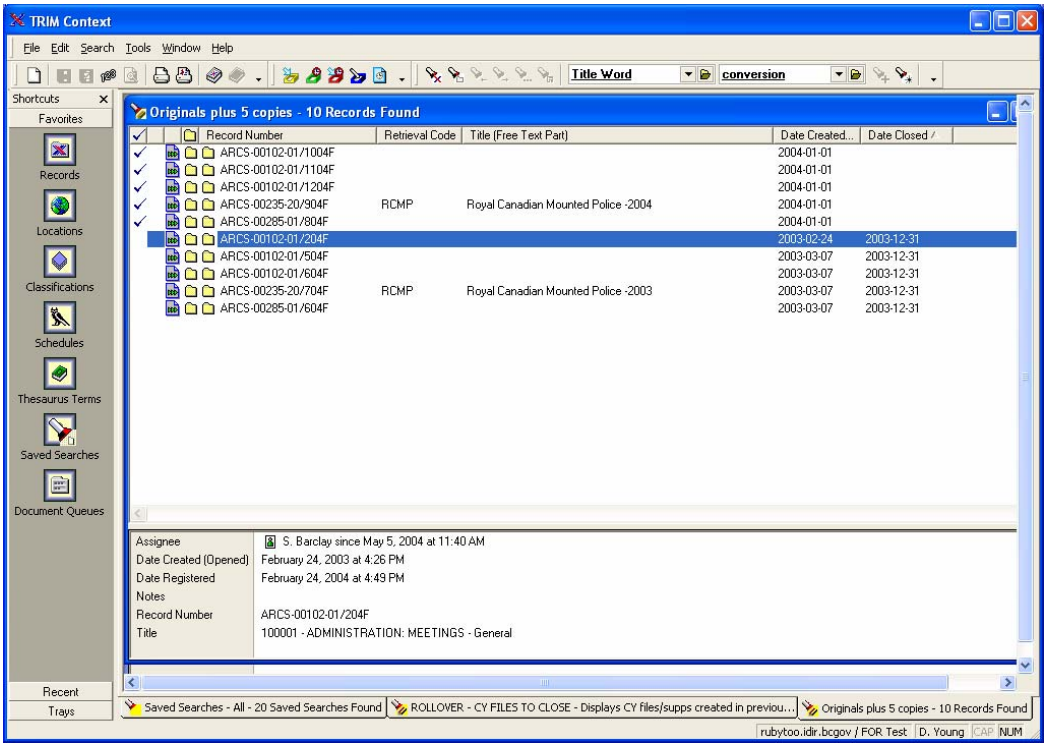


The following screenprint shows the copied files with the new calendar year in the titles (note that "-01 General files do not require a file title):



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The following table lists the **ROLLOVER - FY Files** Saved Search and the steps to be followed by the RMU Staff and the RMC/Records Custodians when rolling over files from the current fiscal year to the new fiscal year.

ROLLOVER SEARCHES	RMU Staff	RMC/Records Custodians
ROLLOVER - FY Files	1. Select Saved Search **ROLLOVER FY FILES**. The FY files that have been opened in the past Fiscal Year (be sure to confirm the dates in the search) and are still open are displayed. This can be done all at once for the entire ministry or branch by branch. 2. Select all and change Close Date to March 31 XXXX. This will close all FY Files for the year. 3. Send e-mail to branch staff advising FY closure has been done.	4. Following notification described in 3, do a search for Closed Date = Mar 31 YYYY for FY files. 5. Print New Labels showing "File Closed Date". 6. Decide which files need to be opened for the New Year. You may wish to print an inventory report to review with staff to determine which need to be opened in advance. 7. Tag the closed files you wish to open for the new years and right click - select "New" "Copy Record" . 8. Having copied the records, sort by Closed Date to segregate the new files. 9. Update the file titles to reflect the current Fiscal Year 10. Print Labels and make up new files.

9.10 How to Close a File

There are two ways to close a file in TRIM. A file will be closed automatically when a new part is created, or you may also select to manually close a file without creating a new part. In order to perform either of these methods you must first search for the file(s) and either create a new part or enter a close date. See **Chapter 6.2** to create a new part.

To manually close a file, follow these steps:

A. Search for the file to be closed.

B. If you are closing multiple files then tag all records.

C. Right-click and choose **Details>Dates** from the short-cut menu.

D. Click *OK* to confirm all tagged records.

E. Check the **Date File Closed** checkbox and select the appropriate date from the calendar or type it manually in the format shown above.

F. Click *OK* to confirm.

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G. Click **Yes to All** to begin processing all records.

Note: Files with an SO retention require that both the File Closed and SO dates be completed so that the retention triggers in TRIM will be activated.

9.11 Record Holds

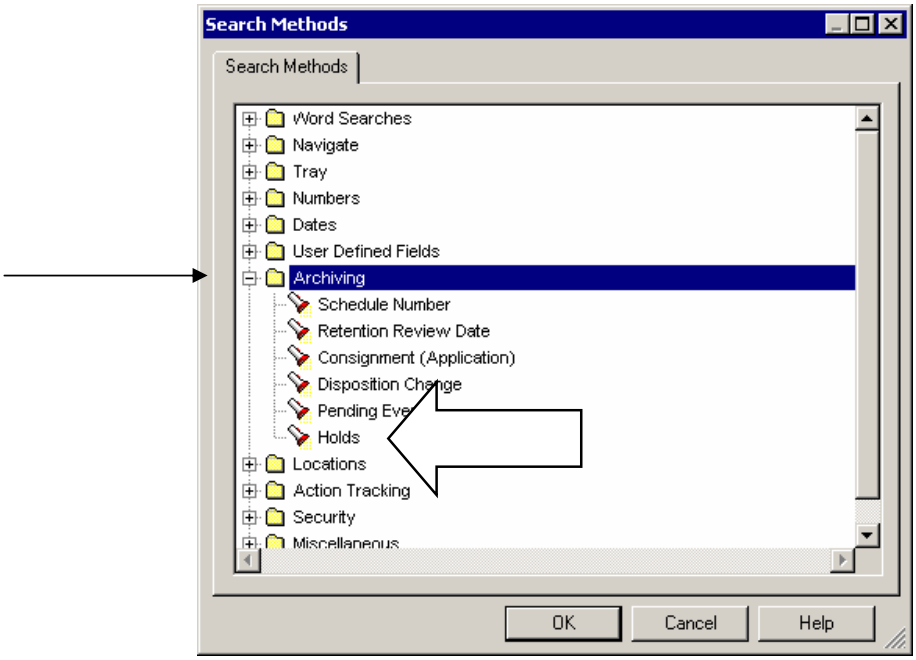
TRIM Context includes the functionality to create Holds for selected records. This "locks" the record, disabling many of the functions available for modifying the record (for example: Location changes, Title changes etc) Record Holds will be performed centrally by the Records Management Unit with direction from the Litigation and FOI Units. If you need to make a change to a record under a **Hold**, contact the Records Management Unit.

An Information Worker cannot place records on hold, but can search for Record Holds as follows:

A. You should be at the main Context screen

B. Click the Find Records button on the toolbar.

C. Search for Record Holds from the **Archiving** search method



D. Click *OK* to open the search screen.

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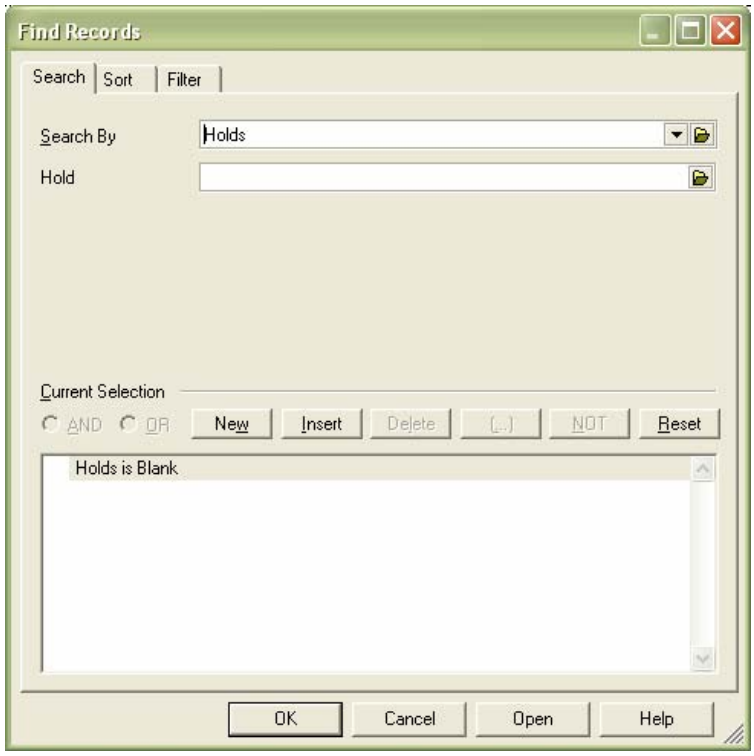
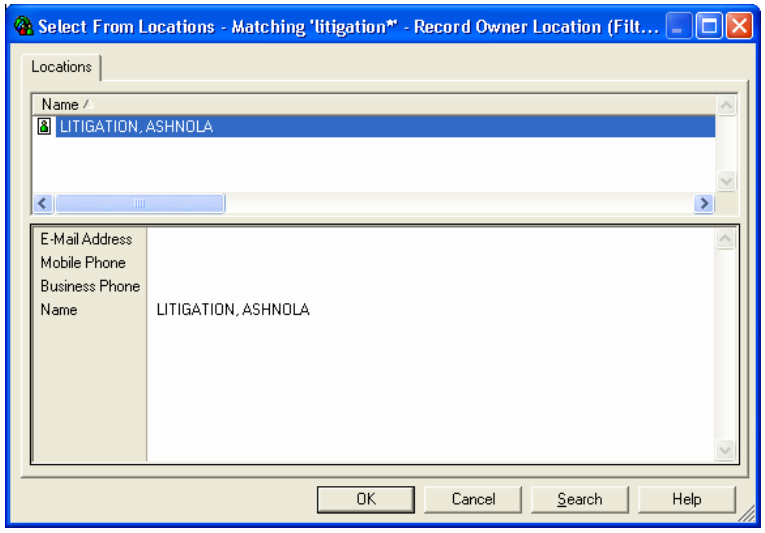


E. Click the KwikSelect button beside the **Hold** field to open the Holds list.



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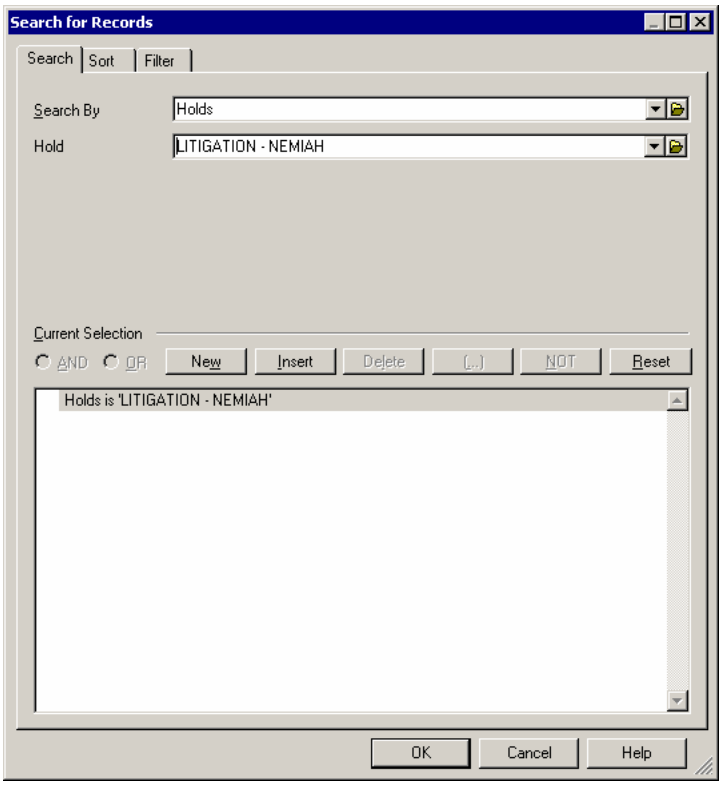
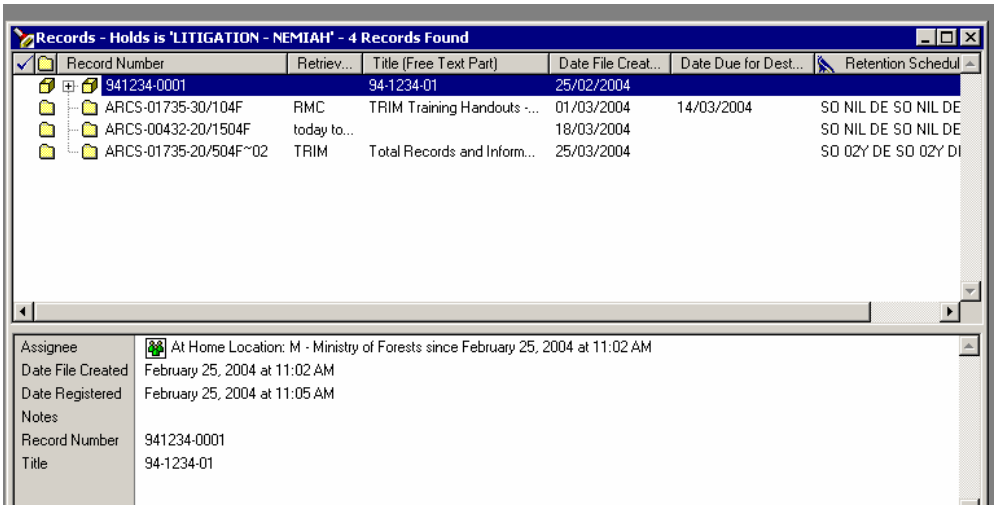
F. Select the appropriate Hold Title and click *OK* to return to the search screen.



G. Click *OK* to begin the search.

H. TRIM will return the results based on the criteria entered.



I. 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. See the following example:

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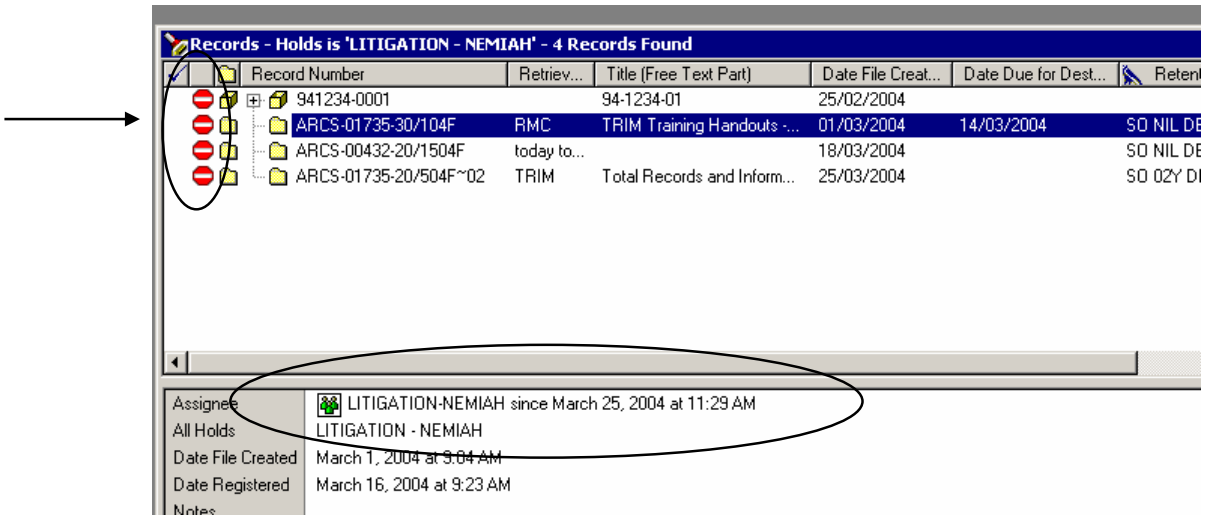

You could also send this list to a report for printing.

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9.12 How Do I Perform Record Maintenance?

Exercises - Record Maintenance

Exercise 1	**Create a New Part to a File**

This exercise will demonstrate how to create a new part to a file in TRIM Context.
You should be at the main Context screen.

Search for the _____ record.

1. Right-click on the record and choose **New>New Part** from the short-cut menu.
2. Click *OK* to accept the defaults in the Create New Part Dialogue Box and to create the new part.
   The new record will appear in a search results screen.
3. Press [**F7**] to Refine the search.
4. Click *OK* to repeat the original search.
5. Click the Record Number column heading to sort by record number.
6. Locate the records with the old and new parts.
7. Check the date closed field in the General Tab of the properties of the old part.
8. Check the Related Records tab properties in both records to see that TRIM has automatically added a relationship between both records.

Exercise 2	**Create a New Part to a File**

Complete the exercise below to create a new part to a file based on the steps learned in the previous exercise.

1. You should be at the main Context screen.
2. Press [**F7**] to refine the previous search.
3. Search for the _____ record.
4. Create a new part for this record.

Exercise 3	**Set a Record as Missing**

This exercise will demonstrate how to set a record as missing in TRIM Context.
You should be at the main Context screen.

Search for the _____ record.

1. Right-click on the record and choose **Locations>Assignee** from the short-cut menu.
2. Check the Set as Missing checkbox.
3. Click *OK* to confirm the change and return to the search results screen.
   The new record will appear in a search results screen.

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Exercise 4 — Set a Record as Missing

Complete the exercise below to set a record as missing in TRIM Context based on the steps learned in the previous exercise.

1. You should be at the main Context screen.
2. Press [**F7**] to refine the previous search.
3. Search for the _____ record.
4. Set this record as missing.

Exercise 5 — Search for Missing Records

This exercise will demonstrate how to search for missing records in TRIM Context.
You should be at the main Context screen.

1. Press [**F7**] to refine the previous search screen.
2. Click the KwikSelect button to open the Search Methods Dialogue Box.
3. Expand the **Miscellaneous** category and select **Missing Records**. (No search value is required for a missing records search.)
4. Click *OK* to begin the search.
5. TRIM will return all missing records.

Exercise 6 — Transfer Records to an External Organization

This exercise will demonstrate how to transfer records to an external organization in TRIM Context.
You should be at the main Context screen.

1. Press [**F7**] to refine an existing search screen.
2. Search for _____ records to be transferred.
3. Tag all records once you have confirmed the search results are correct.
4. Right-click and choose **Locations>Home**.
5. Click *OK* to confirm all tagged records.
6. Click the KwikSelect button in the **Set to Location** field
7. Select the _____ external organization and click *OK*.
8. Click **Yes to All** to set all tagged records to the new Home Location. Leave this search screen open for next exercise.

Exercise 7 — Make a TRIM Reference

This exercise will demonstrate how to transfer records to an internal organization in TRIM Context.
You should be at the main Context screen.

1. Locate the search screen from the previous exercise (records being transferred to an external organization).
2. Ensure all the records are tagged.
3. Click the **Make Reference** button on the **RMC** toolbar or, press [**Ctrl**][**M**].

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4. Click *OK* to confirm all tagged records.
5. You may wish to change the name of the TRIM Reference file from Records.tr5 to Transfer to *name of organization*.tr5.
6. Click *OK* to proceed.
   You can now insert this TRIM Reference into an e-mail to notify the RMU to change the disposition of these records to the appropriate status.

Exercise 8 Transfer Records to an Internal Organization

This exercise will demonstrate how to transfer records to an internal organization in TRIM Context.
You should be at the main Context screen.

1. Press [**F7**] to refine an existing search screen.
2. Search for _____ records to be transferred.
3. Tag all records once you have confirmed the search results are correct.
4. Right-click and choose **Locations>Home**.
5. Click *OK* to confirm all tagged records.
6. Click the KwikSelect button in the **Set to Location** field
7. Select the _____ internal organization and click *OK*.
8. Click **Yes to All** to set all tagged records to the new Home Location.
9. Make a TRIM Reference that can be sent to the RMU to have them change the status of these records.
10. You could also send the tagged records to an Inventory Report for printing.

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9.13 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 TRIM term for volume?

   _____

2. What is the purpose of a TRIM Reference?

   _____

   _____

3. How do you mark a record as missing?

   _____

   _____

4. Briefly describe when you would use a TRIM Reference.

   _____

   _____

5. Why is it necessary to provide TRIM with the Closed/SO dates on SO files that are still open from the previous year?

   _____

   _____

6. Only an Information Worker can place records on hold.
   a. True.
   b. False.

7. Name the different ways to close a file in TRIM.

   _____

   _____

8. How do you know if a record has been placed on hold?

   _____

   _____

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9.14 Summary

In this Chapter you learned how to:

1. Create a New Part to a File.
2. Manage Missing Files.
3. Transfer Files to External and Internal Organizational Units.
4. Make a TRIM Reference.
5. Maintain SO Files.
6. Rollover CY and FY files from Current Year to New Year.
7. Close a File.
8. Search for Record Holds.

You should now understand and know how to perform the above Record Maintenance functions in TRIM Context.

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10. Disposition Management

Disposition management is the process of moving a record through its life cycle of active and semi-active to final disposition.

The steps involved in disposing of records are dependent on the legal requirements of the ministry and other restraints such as storage space and personnel. Retention schedules dictate when files are archived. At the Ministry of Forests, records inherit their retention schedules from the classification plan.

10.1 Objectives

In this chapter you will learn about culling records in TRIM Context and how to:

1. Perform a Disposition search.
2. Create a Box Record.
3. Print Box Contents List Report.
4. Transfer records to On-site Storage/Destruction and Off-site Storage.
5. Transfer to Archives for SR and FR.

Following completion of this chapter you will understand how TRIM Context handles disposition of records.

10.2 Culling

Culling of files happens at least once a year to destroy files or move them to off-site storage. All culling must be done in accordance with ministry policy and procedures and according to the records schedules in ARCS and ORCS. Keeping records longer than their scheduled retention costs money, both in storage and administration costs, liability and efficiency. The following procedures detail how TRIM supports these procedures but you should be familiar with the ministry procedures before doing any file cull.

The ROLLOVER, as described in the Record Maintenance Chapter 9.9 should be done before any CULL is done.

From the CULL search results, pull the files, retrieving any that are signed out and record any that are missing.

Culls are of two main types: those involving immediate destruction and those involving a transfer to off-site storage. Beyond that, we have to segregate *Approved* from *Draft* schedules, *ARCS* from *ORCS*, *Archival Retention (SR and FR)* from *Destruction* AND group records by a 3 year time frame (records requiring 3 years of storage can't be in the same box as records requiring 10 year storage).

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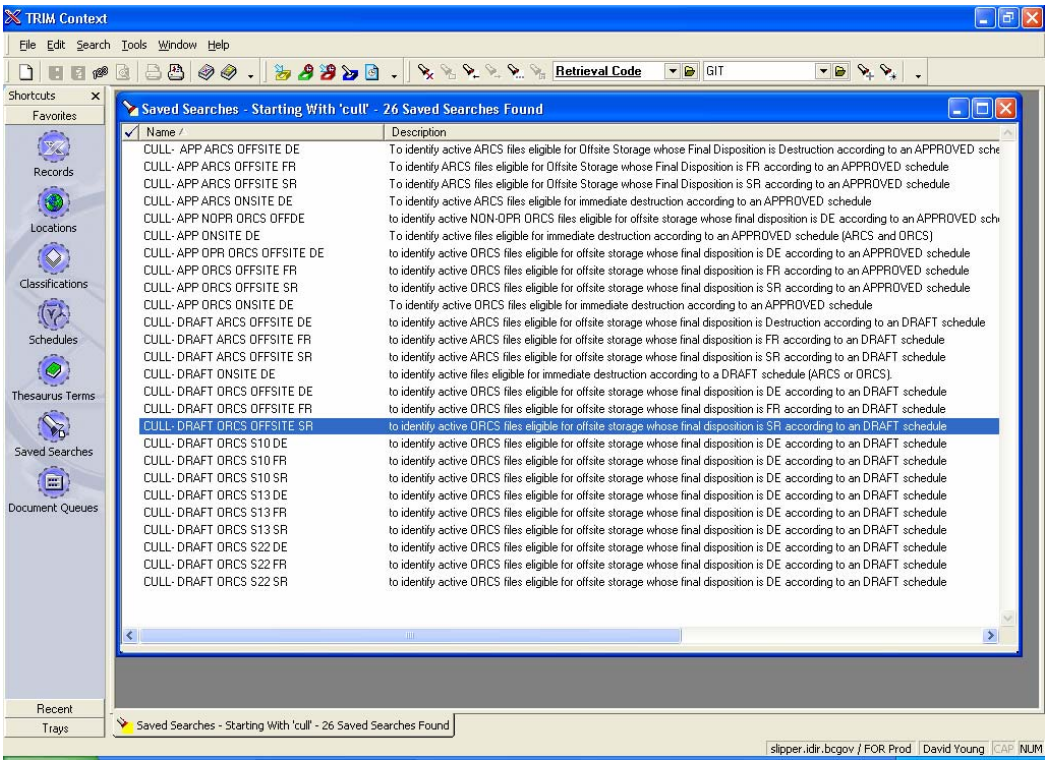
In TRIM, this has been accomplished by setting up a series of "Saved Searches" that will display the records that match each of the criteria. Each of these searches begin with the word "CULL -…" :



Note: these saved searches are applicable to the entire ministry and are NOT specific to your office. You will need to run the search once (double click on the search) then refine the result (F7) to change the filter setting to be relevant to your office.

You can also refine these searches to adjust the date range or to specify a certain group of records (by classification, by location etc.) but the basic parameters are in these searches. Once refined, you can save your own version as a Saved Search – see S. 13 of this manual.

To complete a CULL you will need to run each of these searches, however it is likely that a few of these searches will return the result "no records found" indicating there are no records of that type to be processed.

Note: currently TRIM identifies any onsite record as an "Active" Disposition despite its status according to the retention schedule.

The following provides a description of some of the CULL Saved Searches as listed in the above screenprint.

1. CULL - APP ONSITE DE

This identifies any active records (Approved ARCS and ORCS) which would be eligible for immediate destruction, dated Year to Date.

The saved search is sorted by record number, which has the effect of segregating ARCS from ORCS.

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Note: currently all records to be destroyed (excepting transitory records) are required to be sent off-site for destruction, even though their schedule indicates they could be destroyed immediately.

2. CULL - DRAFT ONSITE DE

This identifies any active records (DRAFT ARCS or ORCS) which are eligible for immediate destruction, dated Year to Date.

As this is a DRAFT schedule no actual destruction can be authorized.

The records are sent to off-site storage.

The saved search is sorted by record number, which has the effect of segregating ARCS from ORCS.

When the schedules are approved, destruction can take place.

3. CULL-DRAFT ARCS OFFSITE DE

This identifies any active ARCS records (DRAFT) which are eligible for eventual destruction, after a specified time in offsite storage, dated Year to Date.

As this is a DRAFT schedule no actual destruction can be authorized.

The records are sent to off-site storage.

The search results are sorted by "Date due for Destruction", then Record Number to identify records having similar retention requirements.

When the schedules are approved, destruction can take place.

The Following Tables Provide the Instructions to be Carried Out by RMHELP Staff and Records Custodians.

CULL SEARCHES	RMHELP	RECORDS CUSTODIANS
1. CULL - APP ONSITE DE		

Note:*: Any destruction of records is immediately suspended when subject to a litigation or FOI request. Although the Records Management Unit confirms this prior to giving authorization, a request that comes in after authorization but before actual destruction must halt that destruction.*

		1. Print CULL Report (see 10.3 below). 2. If required, Create ONSITE STORAGE/DE BOXES (see 10.4 below). 3. Cull the files. Retrieve any that are signed out, record any that are missing. 4. If you have created

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		ONSITE STORAGE/DE BOXES, move the files into these containers. 5. Send the Box List Report with the covering ARS 518 form to the RMHELP for destruction authorization
	6. Reviews ARS 518 and authorizes destruction or amends CULL list	7. Arranges for destruction per the authorization rec'd from the RMHELP. 8. Sends Confirmation of Destruction (ARS 518) to RMHELP
	9. Updates Disposition status in TRIM to "Destroyed"	

2. CULL - DRAFT ONSITE DE 3. CULL-DRAFT ARCS OFFSITE DE 4. CULL DRAFT ARCS OFFSITE SR 5. CULL DRAFT ARCS OFFSITE FR 6. CULL-DRAFT ORCS OFFSITE DE 7. CULL-DRAFT ORCS OFFSITE SR 8. CULL-DRAFT ORCS OFFSITE FR		1. Print CULL Report 2. Create OFFSITE STORAGE BOX RECORDS using the assigned Accession number and ARS 118 Application (Consignment) Number 3. Cull the files. Retrieve any that are signed out, record any that are missing. 4. Transfer the files into boxes, separating ARCS from ORCS, and separating the ORCS sections into different boxes. 5. In TRIM move the files into the appropriate Box containers. 6. Print a copy of the Box Content List Report for inclusion in each of the boxes as a box content list. 7. Print a CONSIGNNMENT AND CONTAINER (BC GOV) Report for the records with the covering ARS 118 form to the RMHELP to have the boxes sent off-site.
	8. Reviews ARS 118	

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	and forwards to CIMB to arrange offsite storage 9. CIMB advises what storage facility will be taking the records and arranges for pickup. 10. Sets the disposition of the records to "Semi-active" and updates the "Home Location" for the boxes.	

9. CULL- APP ARCS OFFSITE DE 10. CULL- APP ARCS OFFSITE SR 11. CULL- APP ARCS OFFSITE FR 12. CULL-APP ORCS OFFSITE DE 13. CULL-APP ORCS OFFSITE SR 14. CULL-APP ORCS OFFSITE FR		1. Print CULL Report 2. Create OFFSITE STORAGE BOX RECORDS using the assigned Accession number and ARS 517a Application (Consignment) Number 3. Cull the files. Retrieve any that are signed out, record any that are missing. 4. Transfer the files into boxes, separating those whose semi active retention period is within a 3 year range (refer to Cull report). 5. In TRIM move the files into the appropriate Box containers. 6. Print a copy of the Box Content List Report for inclusion in each of the boxes as a box content list. 7. Print a CONSIGNNMENT AND CONTAINER (BC GOV) Report for the records with the covering ARS 517a form to the RMHELP to have the boxes sent off-site.
	8. Reviews ARS 517a and forwards to CIMB to arrange offsite storage	

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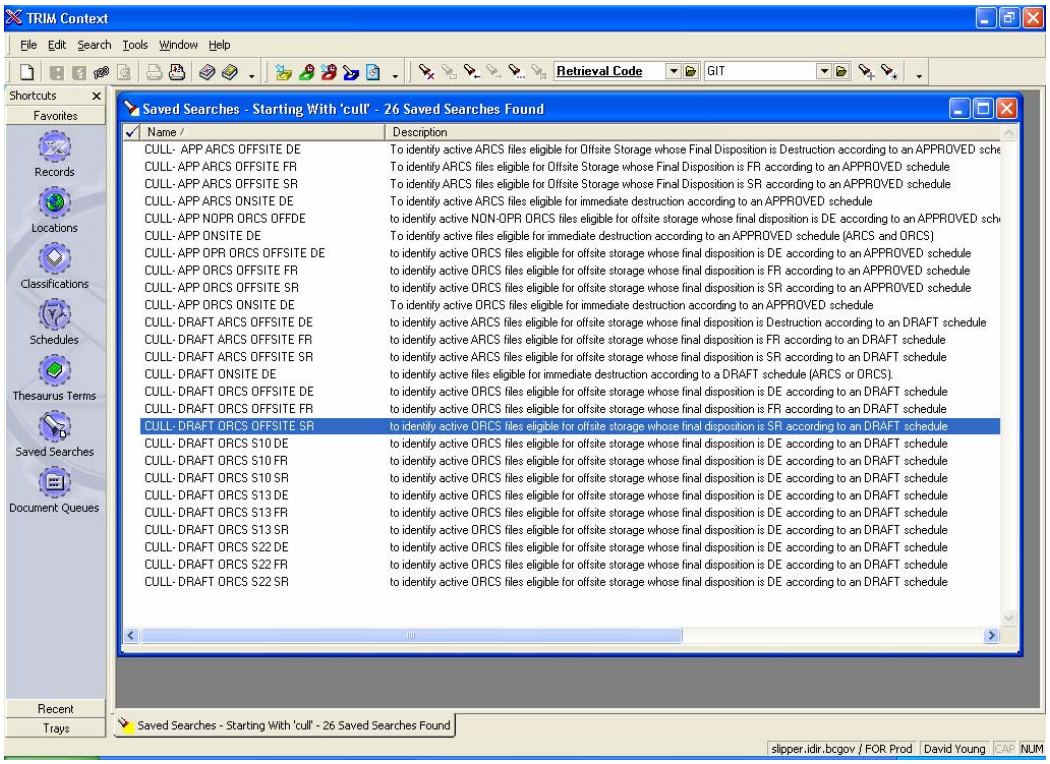
	9. CIMB advises what storage facility will be taking the records and arranges for pickup 10. Sets the disposition of the records to "Semi-active" and updates the "Home Location" for the boxes	

10.3 Disposition Search for Records

You need to perform a Pending Event search for records where the disposition is changing from Active to Semi-Active status and which will be placed in a box(s).

A. Perform a Pending Event search using one of the CULL searches available from the list of Saved Searches already created. Below is a screenprint of those Saved Searches:



B. Double click to run the search. Once a result is shown, you will have to refine the search result (F7) to adjust the filter to your record type. When refining the search you also have the opportunity to narrow the number range to specific record series, or to exclude a specific record series by adjusting or adding to the search criteria. Run the search again with your refined criteria.

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Note: these searches can takes minutes to run.

10.4 Printing Cull Report

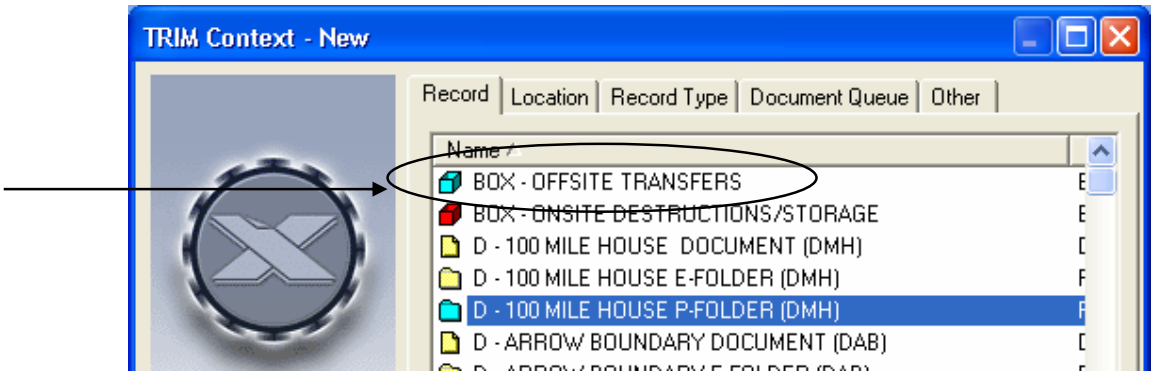
Having run the search described in 10.3, you can print a INVENTORY - SUMMARY DISPOSITION DATES report as a pick list for retrieving the files

Once the records are in the order you want them, tag all and print the

10.5 Creating a Box for Off-Site Storage

When records are due to become semi-active they will need to be placed in one or more boxes for storage at an off-site storage centre. Part of this process will require creating one or more boxes in TRIM. The Home Location should be set to the current location now and then changed to the offsite storage location when the box is actually transferred.

C. Create a New Record



D. Select **BOX – OFFSITE TRANSFERS** Record Type

E. Click *OK* and the following dialogue box will appear:

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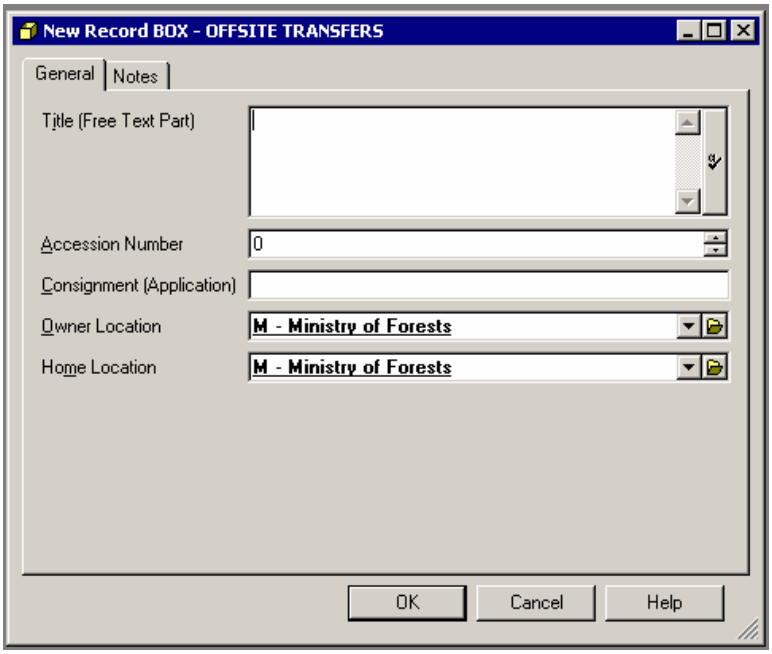
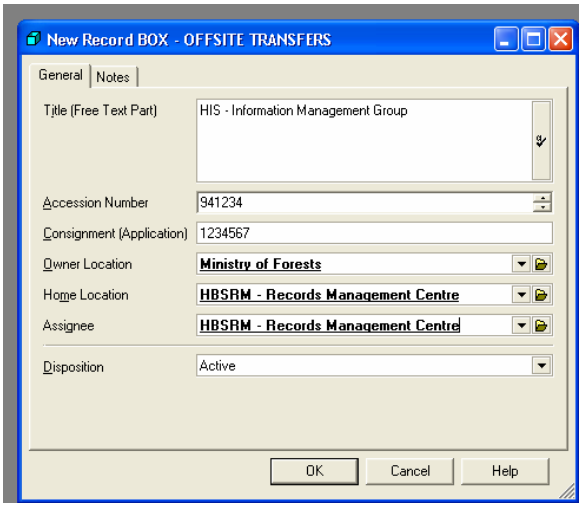


F. Enter the Title in the **Title [Free Text Part]** field. The title of the box will always be the originating office.



G. The **Accession Number** shown above is 94-1234 = 941234 in TRIM.

H. The **Consignment [Application] Number** is from the ARS 118 or 517a form.

I. The **Owner** Location = **Ministry of Forests**.

Note: the owner of the box is the Ministry; the owner of the files within the box will be the individual office.

J. The **Home** Location and **Assignee** = the **originating Office** (where the box is right now)

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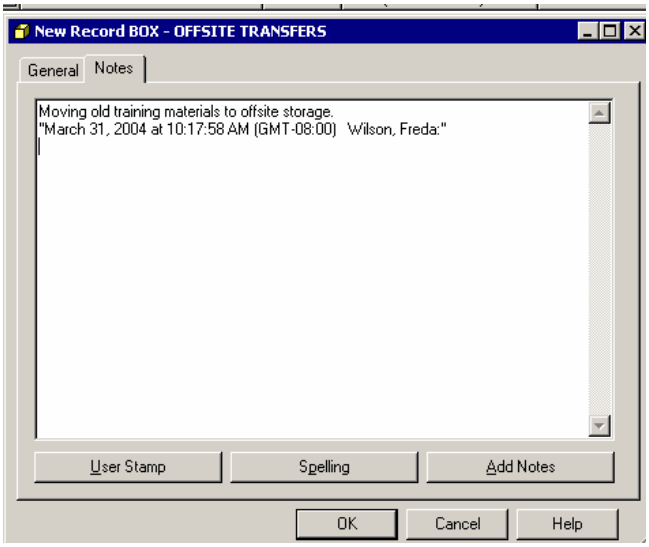
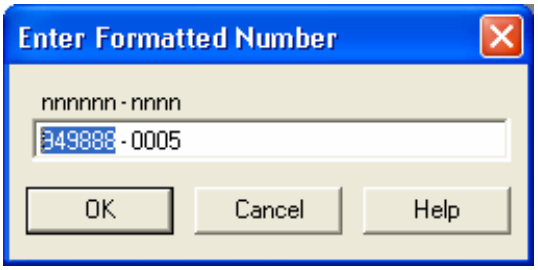
K. **Disposition** should remain as "Active".

L. Click the **Notes Tab** and enter any applicable information in this screen.



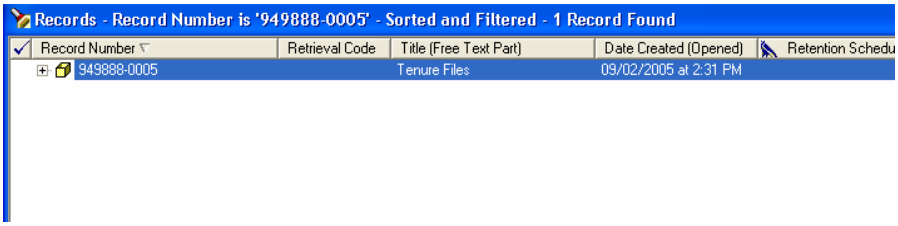
M. Click *OK* to create the Box record.

N. Enter the first Box number of that accession 949888-0005.



O. Click *OK*.

P. You will see 1 Record Found.



Q. The Box Record has now been created.

Note: Use the Copy Record function to create as many boxes as needed. You will be prompted to change the box number for each one. This will make the process easier and save some time

R. Right-click on the new box record and select **New>Copy Record** from the shortcut menu. You will be prompted for a new box number.

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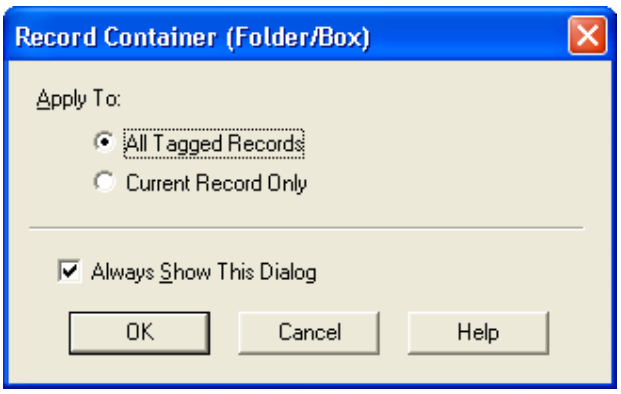
S. Use the Copy Record to create the required number of additional boxes. If you create more Box records in TRIM than you actually use – send a reference for those extras to RMHELP and request they be deleted.

10.6 Adding Records to a Box

Up until now, we have identified the records to be boxed and created the boxes, but have not actually transferred the files to the boxes. We need to let TRIM know when the files have been boxed. To do this:

A. Search for the records and tag them.

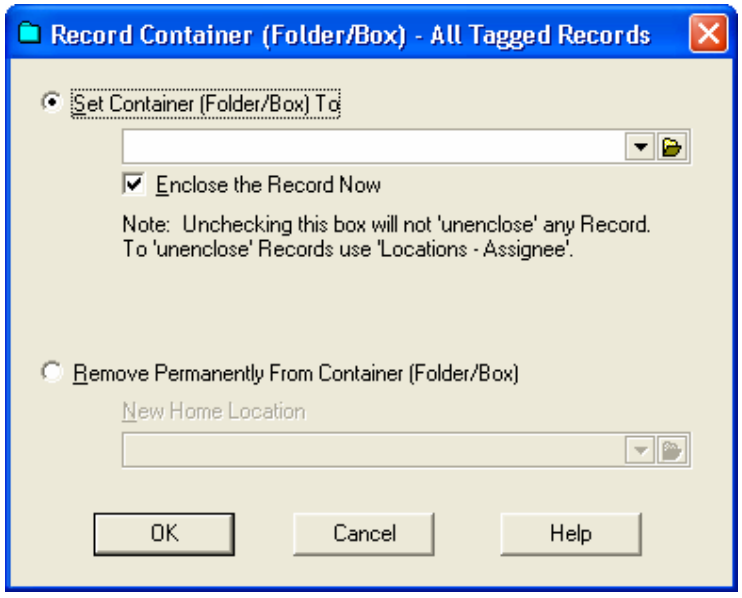
B. Right-click and choose **Locations>Container** from the short-cut menu.



C. Click *OK* to accept all tagged records.

D. Search for the specific box created and **Set Container To** the individual box.

E. Check the '**Enclose the Record Now**' checkbox.



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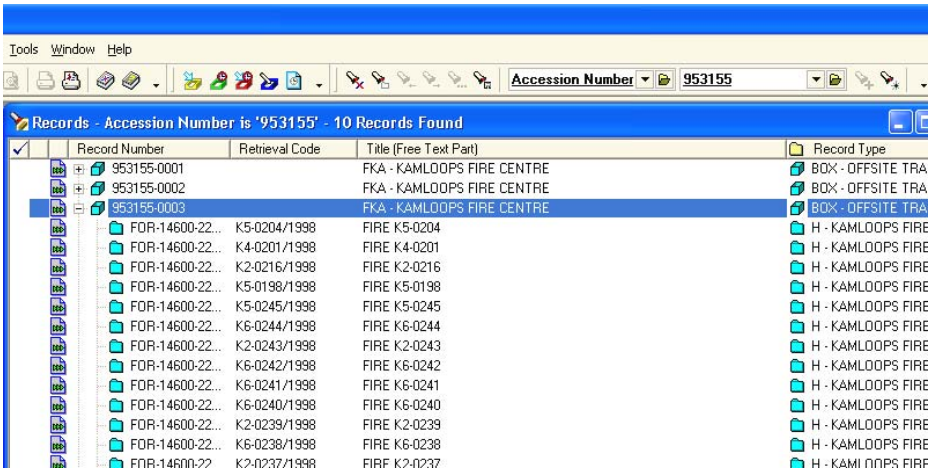
F. Click *OK* to confirm the container.

G. Click **Yes to All** once you are certain you have selected the correct container.

The following screenprint shows a container expanded to display the contained records.



10.7 Print Box Contents List (Consignment Container)

Now that the records have been identified you are ready to print the box contents list.

A. The records in the box should be sorted in order of Final Disposition Date which will be one of either

   a. Date Due for Destruction

   b. Date Due for Selective Retention

   c. Date Due for Full Retention

B. Add the appropriate column to your List Column View and sort by that field:

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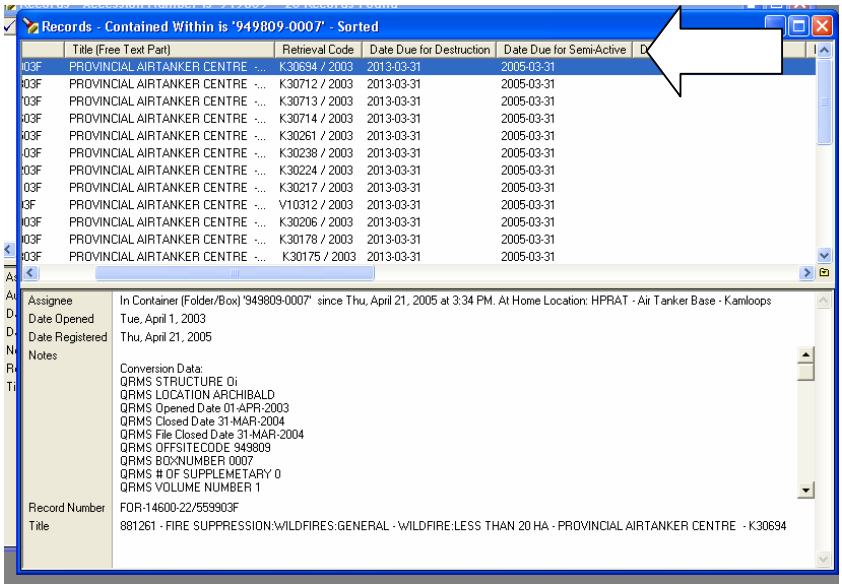
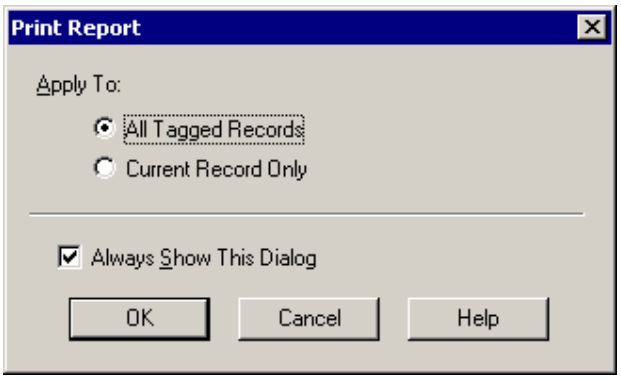


C. Tag the records.

D. Click the **Print Report** button on the toolbar, or right-click in the search results screen and choose **Send to>Print Report.**



E. Click *OK* to print all tagged records.

F. Select the CONSIGNNMENT AND CONTAINER (BC GOV) Report.

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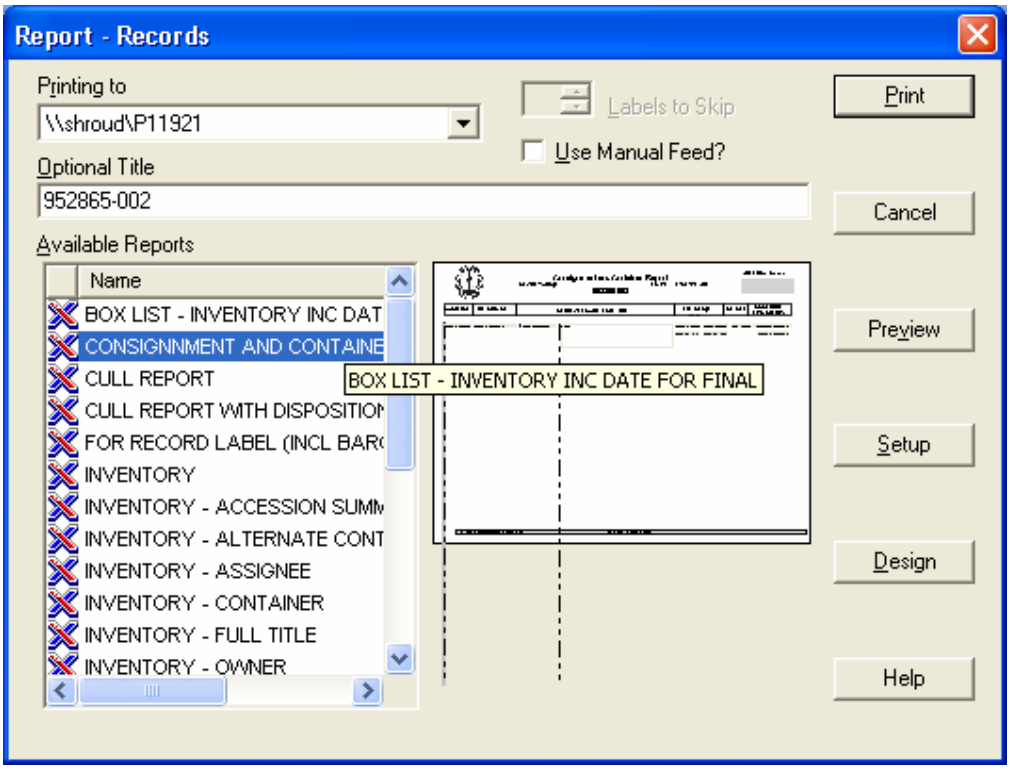
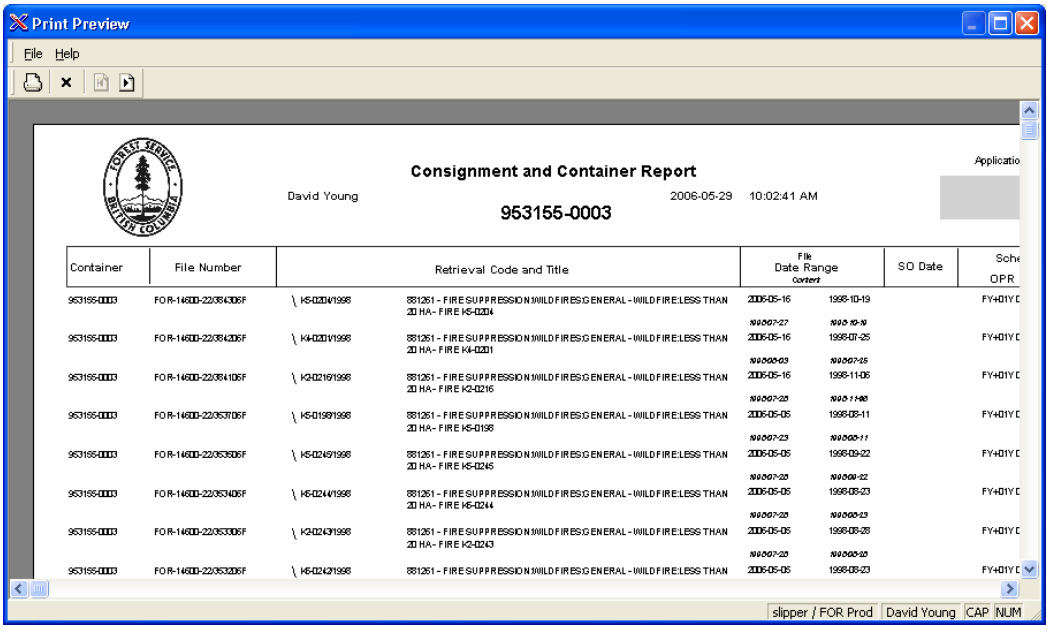


G. Preview the Report.



H. Print the Report if everything looks correct. Remember that the order of the files on the Box Content List MUST match the order of the files in the box

Repeat these steps for all files contained in the boxes. Follow the procedures to obtain the necessary approvals for these records to be archived.

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10.8 Transfer to Archives for SR and FR

Records that reach the end of their semi-active status and based on their retention schedule are ready to be transferred to BC Archives for final disposition of either SR or FR. This is based on receipt of notification that the legal transfer has occurred - there is no shipping of boxes or additional approvals to get. The next step is to change the Owner and Home Locations to BC Archives as well as to change the Disposition of those records to the appropriate status. Again the 'Search, Tag and Do' function should be performed as follows:

A. Search for those records that are to be transferred.

B. Tag all the records.

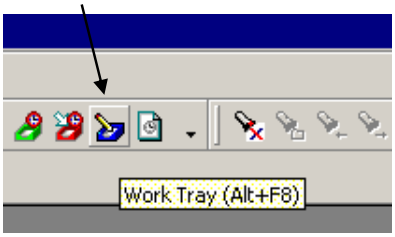
C. Change the Home Location and Owner Location to BC Archives.

D. The Information Manager (RMHELP) will change the Disposition to the appropriate status.

10.9 Records Work Tray

Although we covered The Work Tray earlier in the course, this will be a reminder that using the 'Work Tray' can be very useful when performing disposition management duties. 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.



10.10 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 or tag those records to wish to add to the Work Tray.

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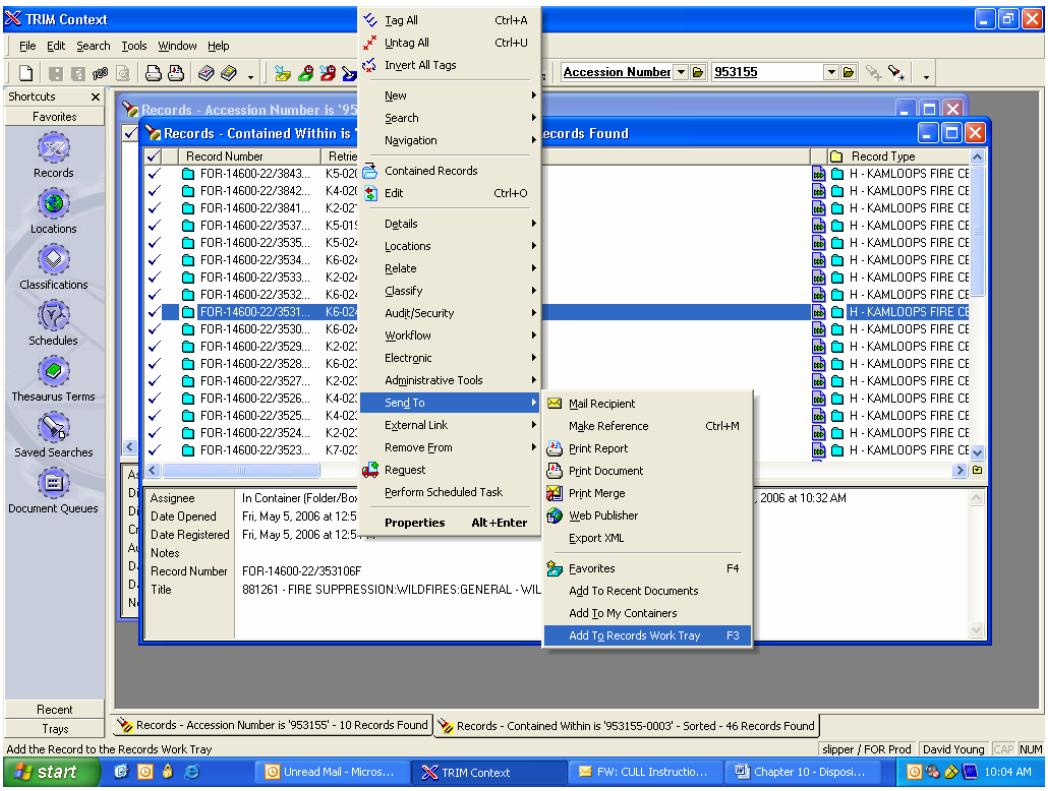

C. Press [**F3**] or, right-click and choose **Send To>Add To Records Work Tray** from the short-cut menu.

D. Click *OK* to confirm.

10.11 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.

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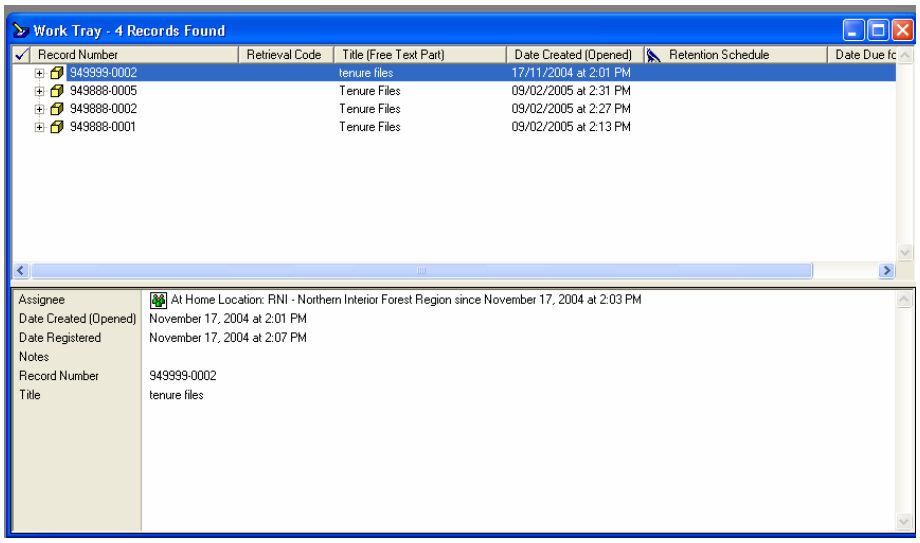
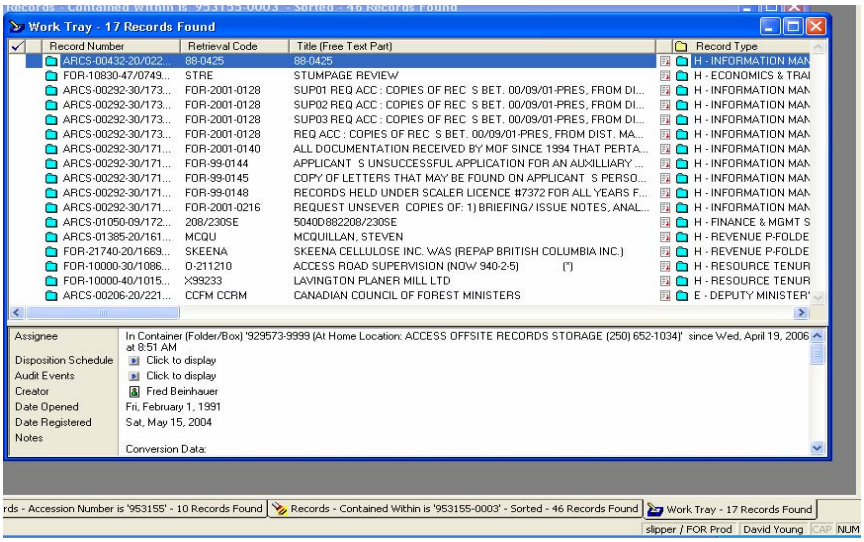


10.12 Removing Records from the Work Tray

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 4 records in the Work Tray:



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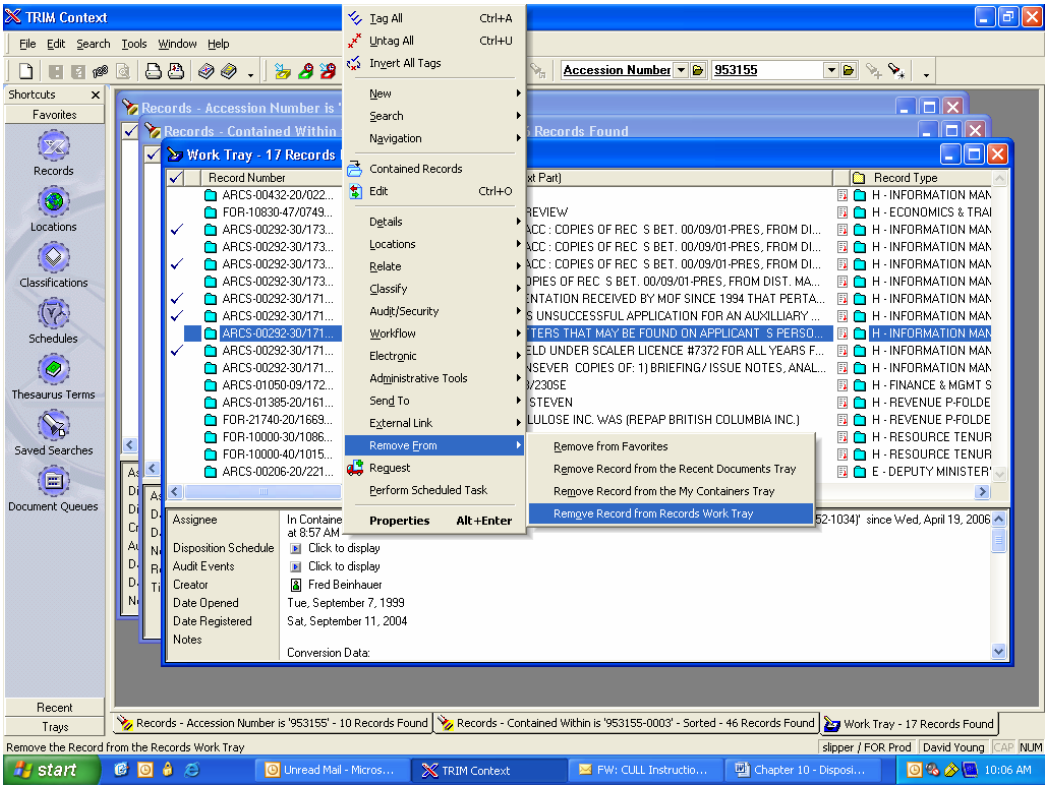
B. Tag the records you no longer need to keep in the Tray.



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.

The records will be removed and you will be returned to the Work Tray screen.

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10.13 How Do I Perform Disposition Management?

Exercises - Culling

Exercise 1 Perform a Draft ORCS Offsite SR Search

This exercise will demonstrate how to perform a disposition search for active Draft ORCS records in TRIM Context that are eligible for Selective Retention by the Archives after being in Offsite storage for a period of time and that are dated Year to Date.

1. You should be at the main Context screen.
2. Go to **Saved Searches** or press [**Ctrl**][**G**].
   Leave this screen open for these exercises in this Chapter.
3. Double-click the **CULL - DRAFT ORCS OFFSITE SR** Saved Search.
4. Press F7 to refine the search filter to show just the records for your office.
5. Tag all records in the search results screen that met the search criteria and which will go into one or more boxes.
   Leave this search screen open to determine the approximate number of boxes you will require and for a later exercise.

Exercise 2 Create Box(es) for Draft ORCS Offsite SR Records

This exercise will demonstrate how to create one or more boxes for the records in the previous exercise.

1. You should be at the main Context screen.
2. Click the New Record/Object Button] or, press [**Ctrl**][**N**].
3. Select **BOX - OFFSITE TRANSFERS** as the record type.
4. Click *OK* to open the New Record Dialogue Box.
5. Enter _____ in the **Title** field.
6. Enter _____ in the **Consignment [Application]** field.
7. Add any notes that may be relevant.
8. Click *OK* to prompt for the first box **Accession Number**, and enter, _____-____.
9. Click *OK* to confirm and create the Box record.
10. Leave this search screen open with the new Box record.

Exercise 3 Copy Record to Create Multiple Box(es)

This exercise will demonstrate how to copy an existing record for example, the **Box - OffSite Transfers** Record created in the previous exercise.

1. Right-click on the newly created Box record.
2. Choose **New>Copy Record** from the shortcut menu.
3. Choose the number of copies you wish to make.
4. Select or Deselect the properties you wish copied to the new records.

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5. Enter, _____-____ for the new box accession number. You will be prompted for each new box being created.
6. Click *OK* to confirm and create the Box record(s).
7. Right-click the new box record and choose **Properties**.
8. Edit the title to something of your choice.
9. Repeat steps 7 and 8 above for each new box created.
10. Leave this search screen open with the new box records.

Exercise 4 Adding Records to a Box

This exercise will demonstrate how to add records to a box in TRIM Context.

1. Go to the search results screen you performed in Exercise 1 for Draft ORCS Offsite Storage SR records.
2. Tag the approximate number of these records that will fit into the first box.
3. Right-click and choose **Locations>Container** from the short-cut menu.
4. Click *OK* to accept all tagged records
5. Search for the specific box and **Set Container To** that box.
6. Check '**Enclose the Record Now**' checkbox.
7. Click *OK* to confirm the container.
8. Click **Yes to All** to enclose the tagged records in this box.

Exercise 5 Perform an Approved ARCS Offsite DE Search

This exercise will demonstrate how to perform a disposition search for active Approved ARCS records in TRIM Context that are eligible for Destruction after being in Offsite storage for a period of time and that are dated Year to Date.

1. You should be at the main Context screen.
2. Go back to the **Saved Searches** screen or press [**Ctrl**][**G**] to reopen it.
3. Double-click the **CULL - APP ARCS OFFSITE DE** Saved Search.
4. Press F7 to refine the search filter to show just the records for your office.
5. Tag all records in the search results screen that met the search criteria and which will go into one of more boxes.
   Leave this search screen open to determine the approximate number of boxes you will require.

Exercise 6 Create Box(es) for Approved ARCS Offsite DE Records

This exercise will demonstrate how to create one or more boxes for the records in the previous exercise.

1. You should be at the main Context screen.
2. Click the New Record/Object Button] or, press [**Ctrl**][**N**].
3. Select **BOX - OFFSITE TRANSFERS** as the record type.
4. Click *OK* to open the New Record Dialogue Box.
5. Enter _____ in the **Title** field.
6. Enter _____ in the **Consignment [Application]** field.
7. Add any notes that may be relevant.
8. Click *OK* to prompt for the first box **Accession Number**, and enter, _____-____.
9. Click *OK* to confirm and create the Box record.

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10. Leave this search screen open with the new Box record.

Exercise 7 Adding Records to a Box

This exercise will demonstrate how to add records to the box(s) created in the previous exercise.

1. Go to the search results screen you performed for Approved ORCS Offsite Storage DE records.
2. Tag the approximate number of these records that will fit into the first box.
3. Right-click and choose **Locations>Container** from the short-cut menu.
4. Click *OK* to accept all tagged records
5. Search for the specific box and **Set Container To** that box.
6. Check '**Enclose the Record Now**' checkbox.
7. Click *OK* to confirm the container.
8. Click **Yes to All** to enclose the tagged records in this box.

Exercise 8 Adding Records to the Work Tray

This exercise will demonstrate how to add records to the Work Tray. You may wish to run one of the saved searches, tag the records in the search results screen and save them to the Work Tray. You could then create the boxes for these records later by accessing them from the Work Tray.

1. Go back to the **Saved Searches** screen or press [**Ctrl**][**G**] to reopen it.
2. Select one of the CULL Saved Searches from the list.
3. Tag all the records.
4. Press [**F3**] to add all records to the Work Tray.
5. Click *OK* to accept all tagged records.
6. Click the Work Tray button on the TRIM Toolbar or, press [**Alt**][**F8**] to open the Work Tray.

Exercise 9 Removing Records from the Work Tray

This exercise will demonstrate how to remove records from the Work Tray when no longer required.

1. Click the Work Tray button on the TRIM Toolbar, or press [**Alt**][**F8**] to open the Work Tray screen.
2. Tag the records no longer needed.
3. Right-click and choose **Remove From>Remove Record from the Records Work Tray**.
4. Click *OK* to accept all tagged records.
5. The records will be removed from the Work Tray.

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10.14 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. What type of search method in TRIM should be performed to find records where the disposition is changing from Active to Semi-Active?
   _____

2. List four of the available CULL Saved Searches that can be used when culling records.
   a. _____
   b. _____
   c. _____
   d. _____

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?
   _____

4. What type of record is created when moving files to offsite storage?
   _____

5. What are the steps required to transfer records to the Archives for SR and FR schedules?
   _____
   _____
   _____

6. Briefly describe the steps required to add records to a box.
   _____
   _____

7. What is the purpose of the Records Work Tray?
   _____
   _____

8. What TRIM function is used to print the Contents of the Consignment Container?
   _____

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10.15 Summary

In this Chapter you learned about the disposition of records in TRIM Context and how to:

1. Perform a Disposition search.
2. Create a Box Record.
3. Print Box Contents List Report.
4. Transfer records to On-site Storage/Destruction and Off-site Storage.
5. Transfer to Archives for SR and FR.

You should now understand how TRIM Context handles disposition of records.

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11. Locations

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.

11.1 Objectives

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

1. Person
2. Organization
3. Group
4. Committee
5. Project Team
6. 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.

11.2 Understanding Locations

TRIM Context arranges all Locations according to a hierarchy such as Ministry and then Branch or District.

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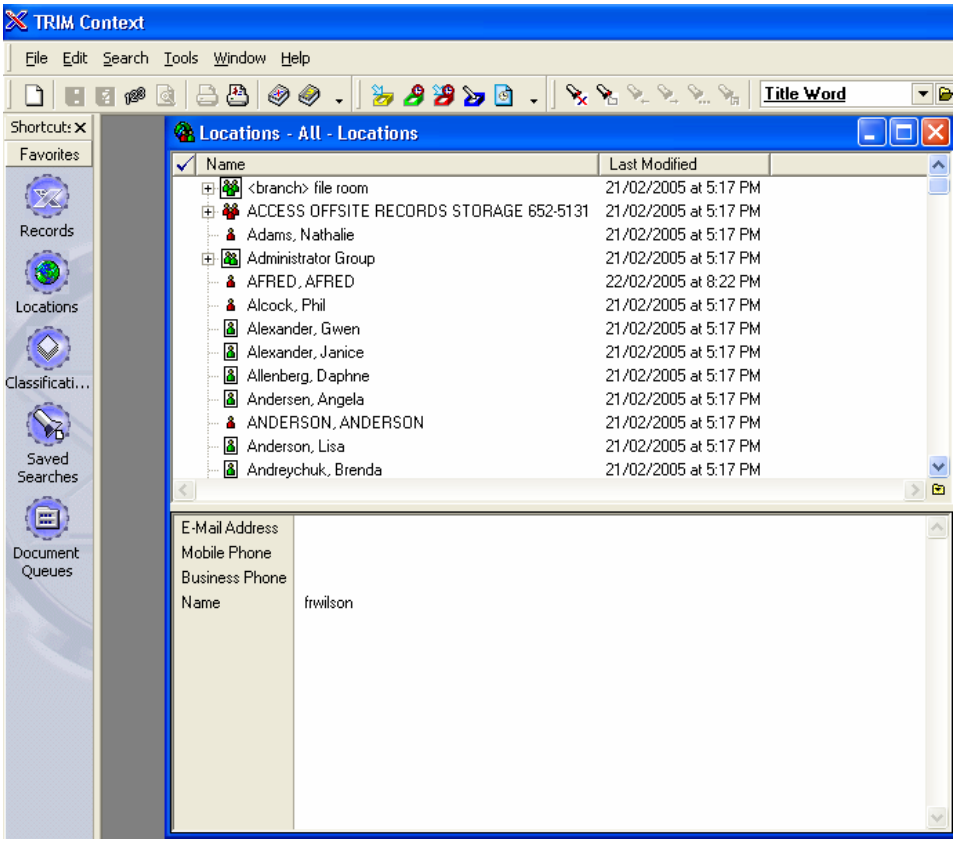
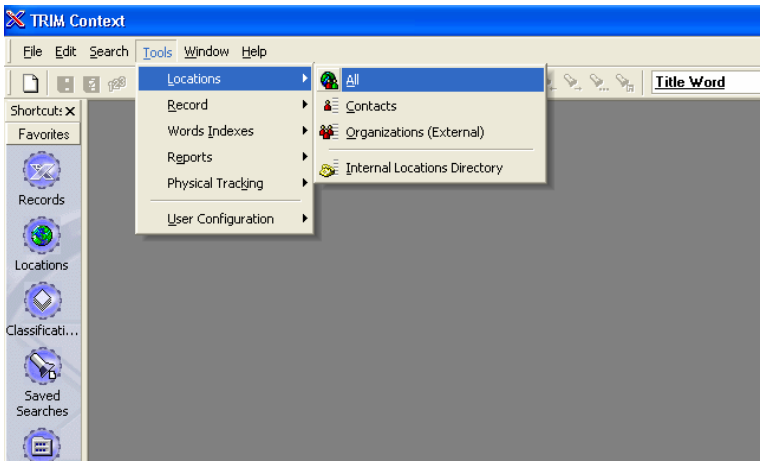


This gives you the ability to generate reports based on any layer that exists within your organization. It is standard practice to create a hierarchy of Locations that reflect your organizational structure.



A. Select **Tools|Locations>All** from the Tools Menu or, Click the **Locations All** button on the toolbar. (You can turn this toolbar on by right-clicking on the toolbar and choosing Locations.)
A list of all the locations in the TRIM dataset will be displayed.

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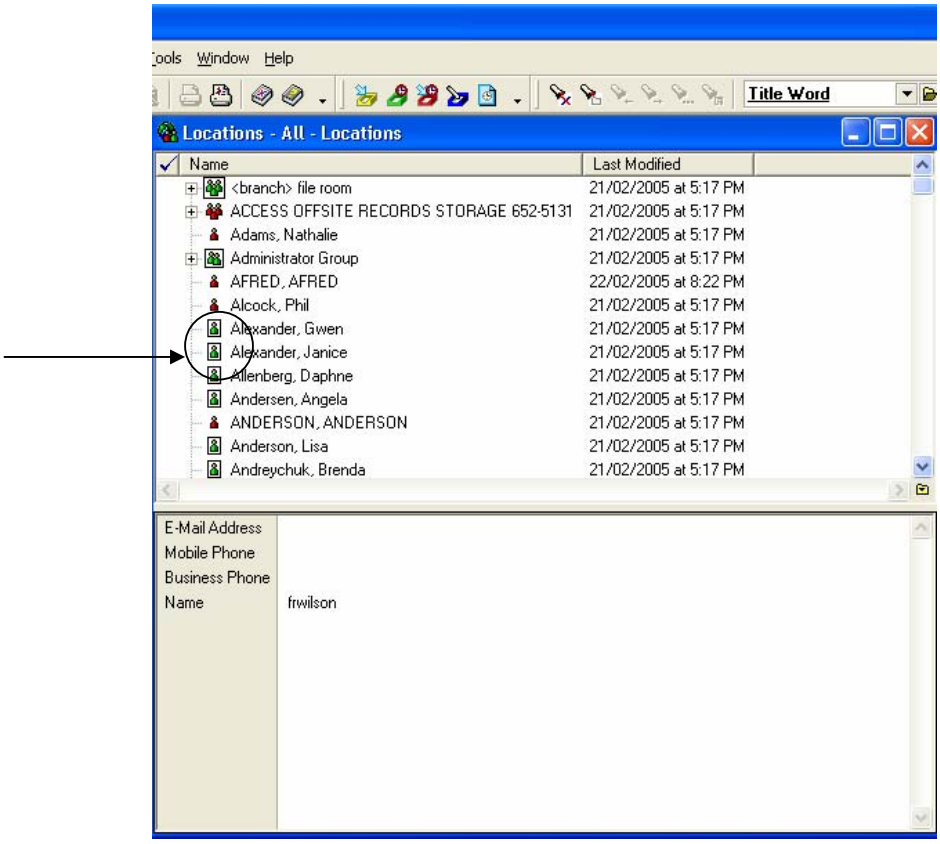
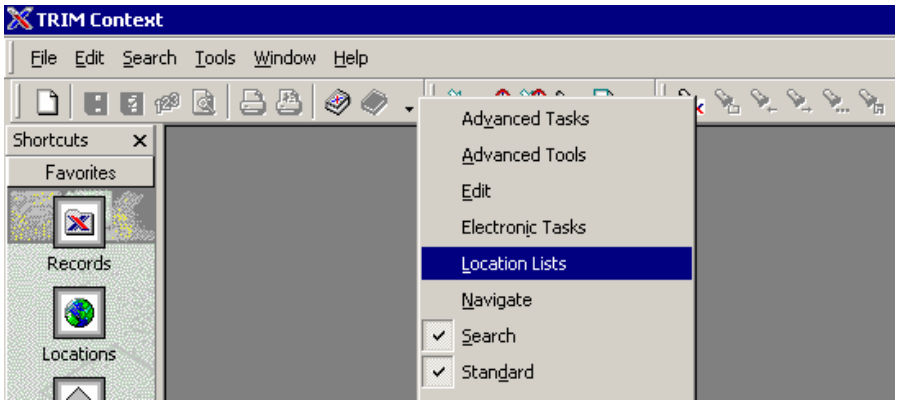


The list shows the type of locations that exist, such as Person, Group and Organization.

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.

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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)
	Position (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	***For example***: Ministry of Forests - top level Branch - next level down

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Physical	***For example:*** 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	Branch (Divisional Structure)
Home Location	Records Management Unit
Assignee	Login User

11.3 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

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

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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

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
Reverse Final Declaration	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 (Restricted)	Y	N	N	N	N
Record Archivist	Y	Y	N	N	N
Document Update	Y	Y	Y	Y	N
Document Delete/Purge	Y	Y	Y	N	N
Append to Existing Notes	Y	Y	Y	Y	N
Can Save Record Searches	Y	Y	Y	Y	Y
Add Record Relationships	Y	Y	Y	Y	N

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Remove Record Relationships	Y	Y	Y	Y	N
Attach Contacts	Y	Y	Y	Y	N
Remove Contacts	Y	Y	Y	Y	N
Set Container for Records	Y	Y	Y	Y	N
Change Container	Y	Y	Y	Y	N
Remove from Container	Y	Y	Y	Y	N

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

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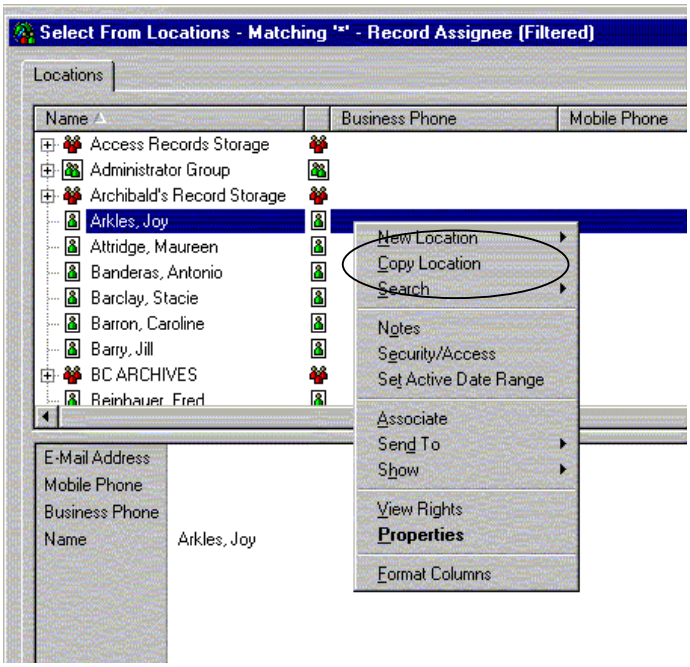
11.4 Create an Internal Person Location

Information Workers will typically create a new internal (person) location to process a request for a file from a staff member who has not yet been entered into TRIM.

The basic steps to create an Internal Person Location are:

1. Select and highlight an existing person or organization (for Litigation cases), right click and choose "**Copy Location**". Note that is it best to copy an existing location from the same branch.



2. Highlight and delete the (2) name that appears and enter the name of the new location in upper and lower case. You can type e.g. Jack Purvis, or Purvis, Jack. TRIM will sort it by last name.

   Make sure **Internal** is checked.

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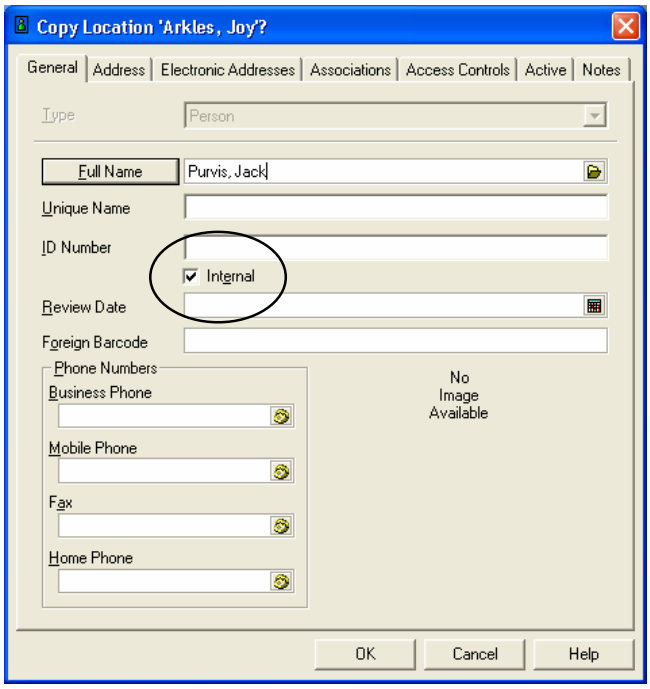
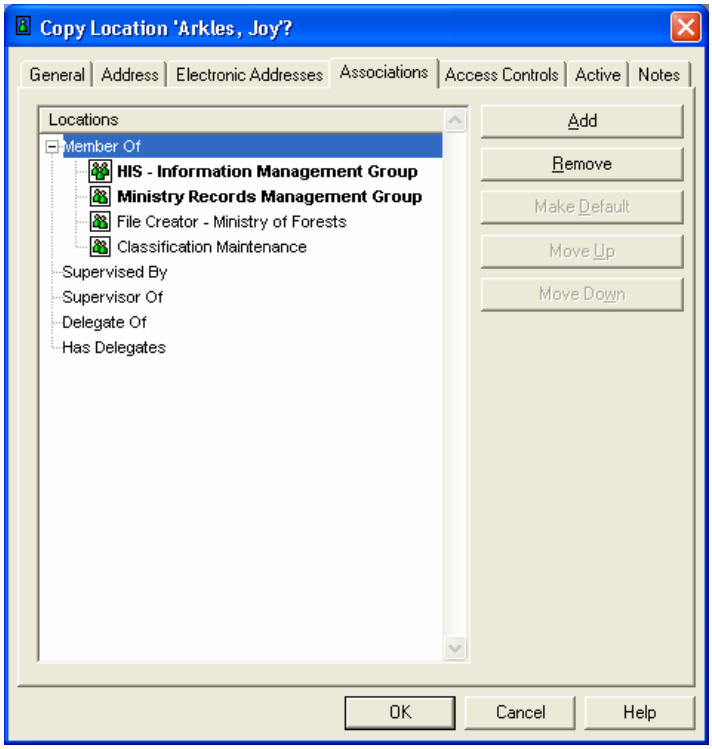


3. Click on the **Associations** tab.
4. If the Branch shown is NOT the branch the employee works for, highlight the branch and click **Remove**.
5. Click "**Add**" and scroll down to highlight the correct location.
6. Click "**OK**" to accept new association. Click "**OK**".



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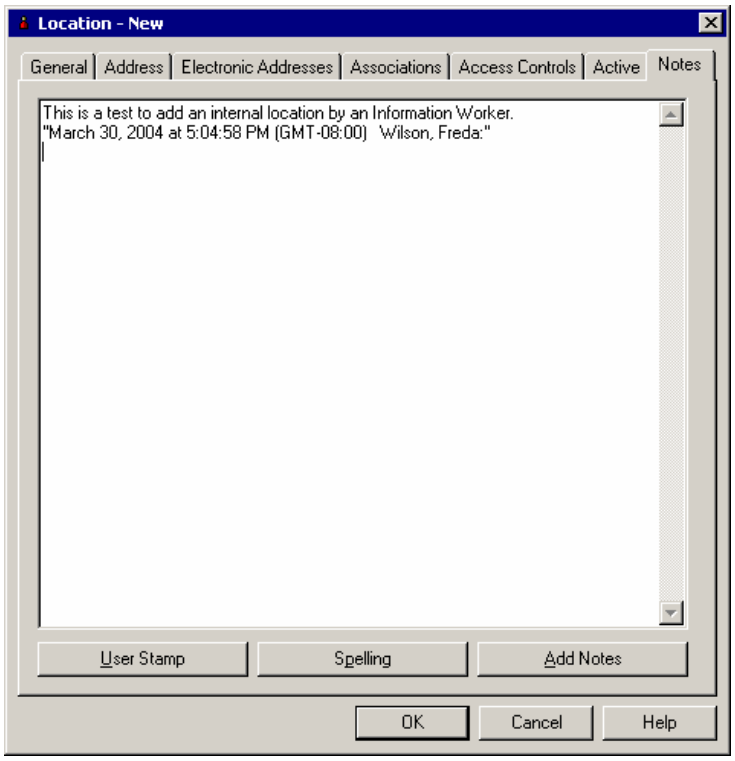
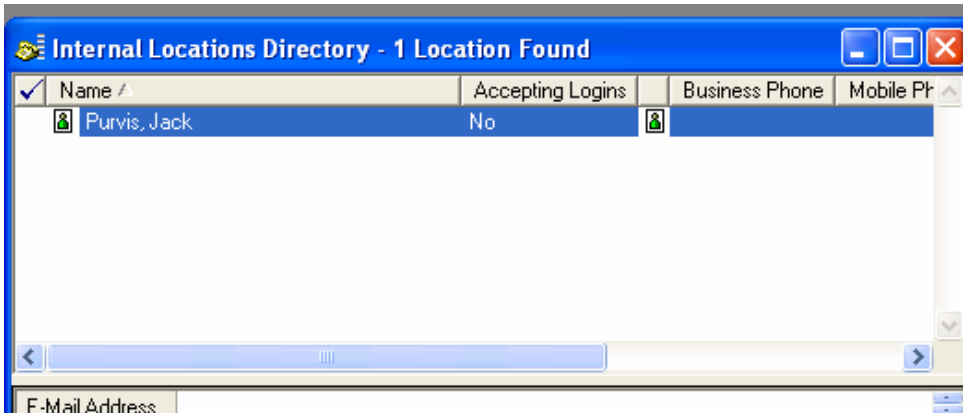
7. You may wish to add some relevant information in the Notes Tab.



8. Click "**OK**" to accept new location.

TRIM will display a search screen with the new location listed.



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11.5 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. In your own words, what is the purpose of Locations in TRIM?

   _____

   _____

   _____

2. An End User can add and maintain Internal Locations.
   a. True
   b. False

3. List the type of Locations in TRIM.
   Person
   Position
   Group
   Organization
   Committee
   Project Team

4. Match the correct description to the appropriate Location Icon.

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

5. Briefly list the steps to create an Internal Person Location.

   _____

   _____

   _____

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11.6 Summary

In this Chapter you learned about the following types of locations:

1. Person
2. Organization
3. Group
4. Committee
5. Project Team
6. How to create an Internal Person Location.

You should now have an understanding of TRIM locations and how they function in TRIM Context™ as well as know how to create an Internal Person Location type.

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12. 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.

12.1 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 Meta-variables
6. 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.

12.2 Different 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.

Drop-Down List:
The Drop-down List will display the most recently used Search Methods up to the last 20. This list will be empty until the first search is performed.

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.

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12.3 Search Values

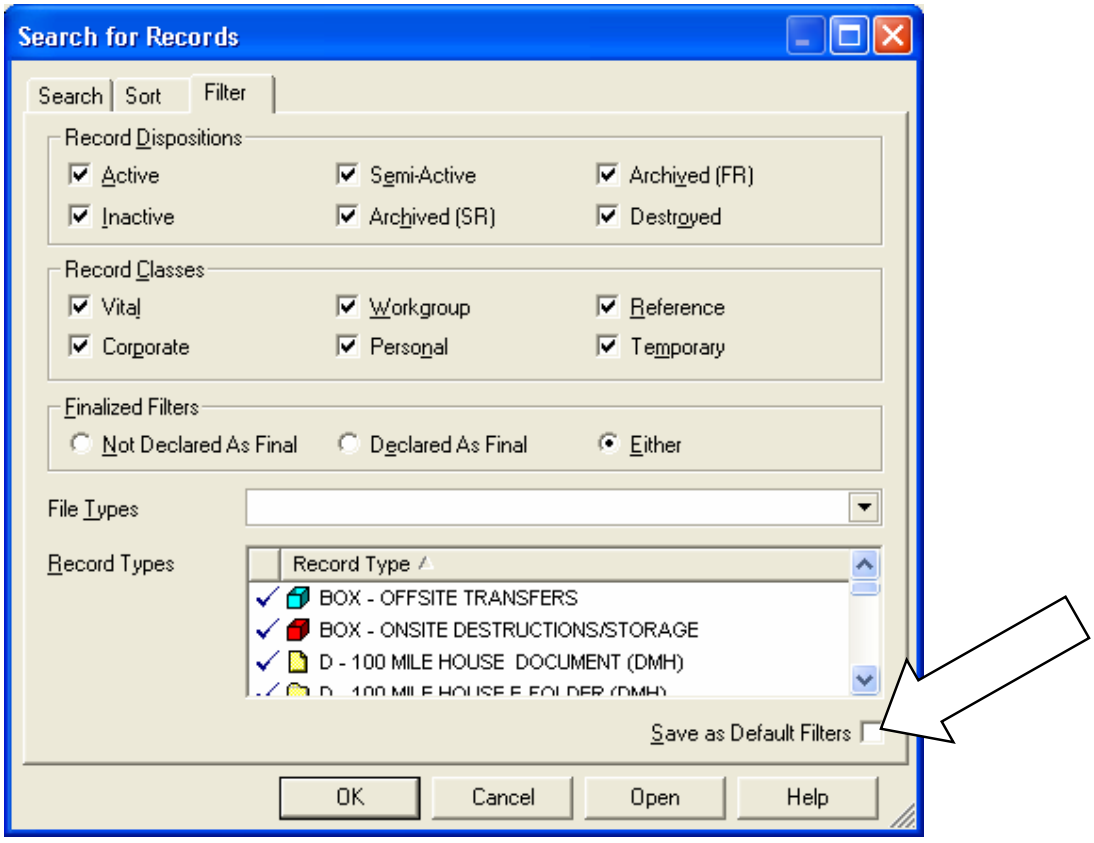
Depending on the Search Method selected, TRIM will change the name of the fields to those that you can enter in your search value. These are logically named and most fields will offer a KwikSelect and/or Drop-down list to help you select a search value. These values will vary depending on the type of 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.

12.4 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

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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.

Caution: Checking the Save as Default Filters checkbox means all subsequent searches will have the default filters applied.

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.

12.5 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 defaults to No Sort in each of the fields. The Descending Checkbox is unavailable until you select a sort field.

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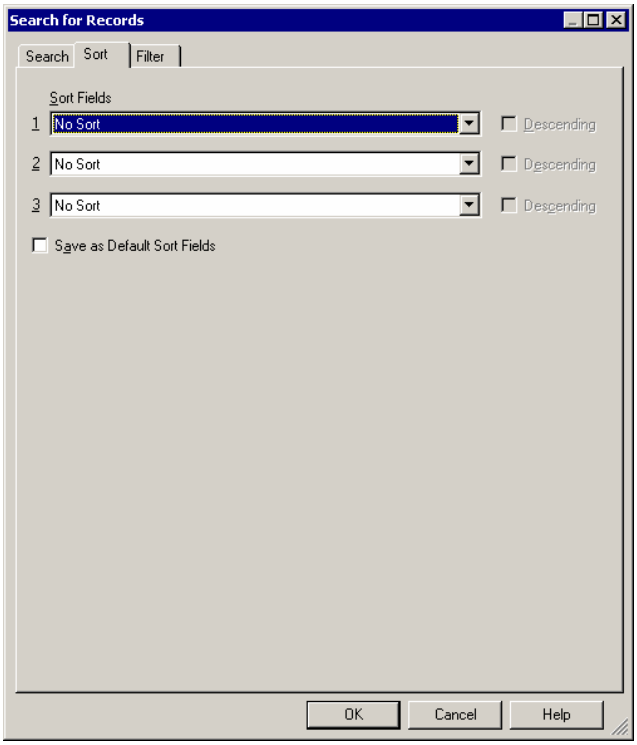
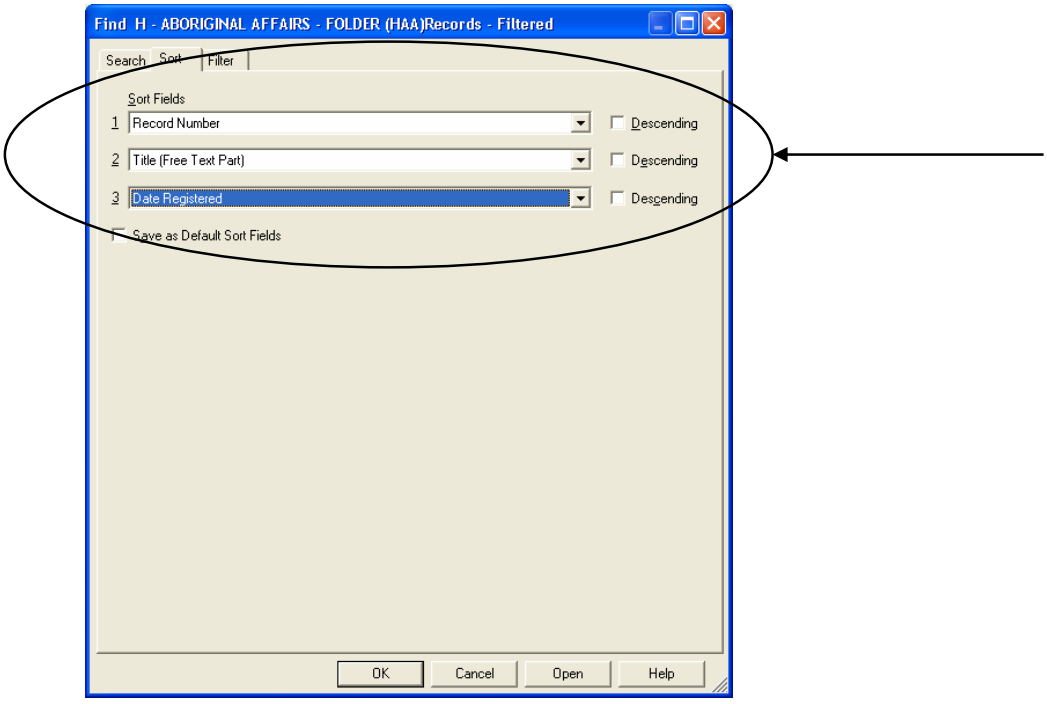


Select the Fields you wish to sort on from the Drop-down list. You can change the sort order of a field by placing a checkmark in the Descending Checkbox next to that field.



The following screenprint shows the results of a Date Registered search and the records

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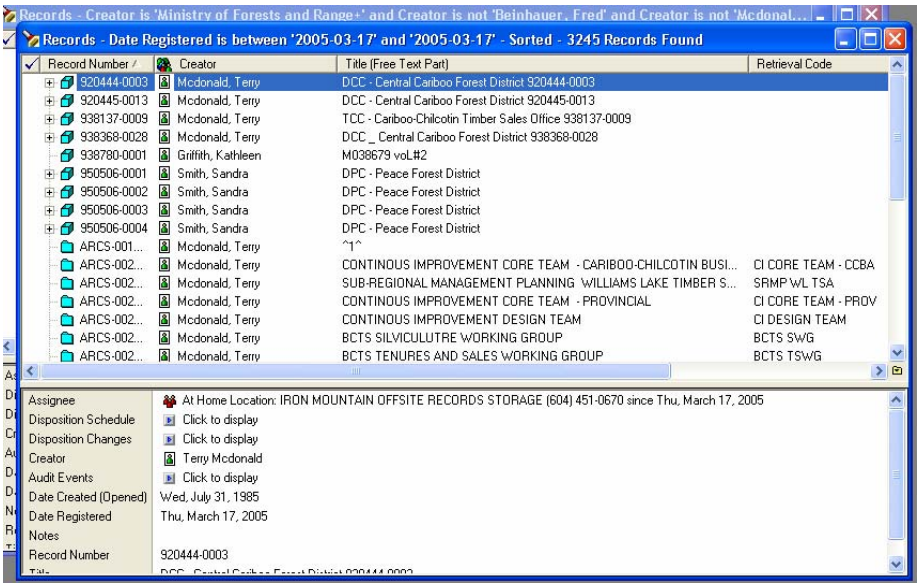
sorted according to Record Number, Free Text Title and Date File Created.



12.6 How to Search for Records by Classification

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.

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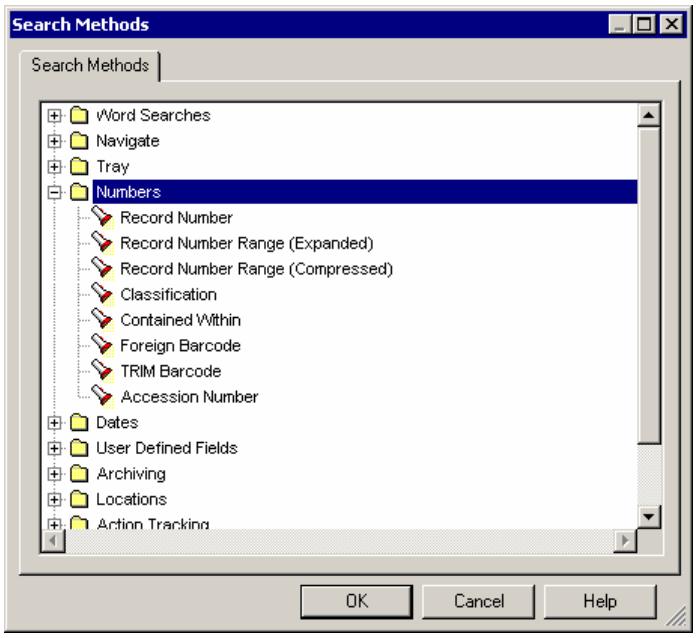
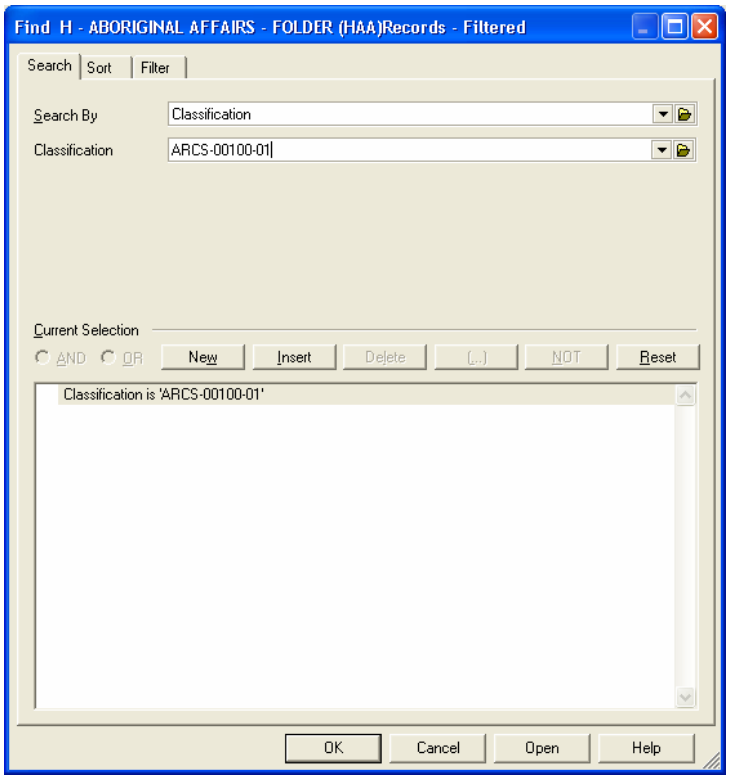


4. Select **Classification** from the list and click *OK*



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.

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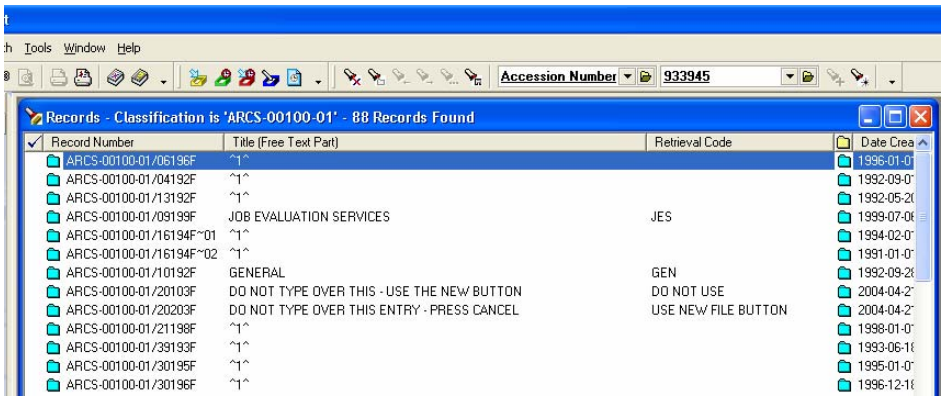
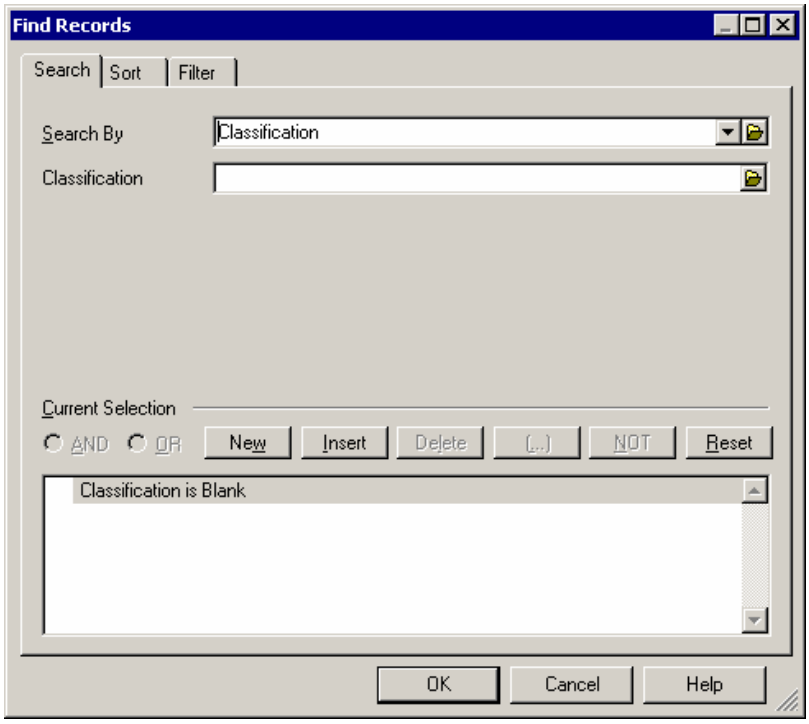


7. To see all records, leave the **Classification** field blank and click *OK*.



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.

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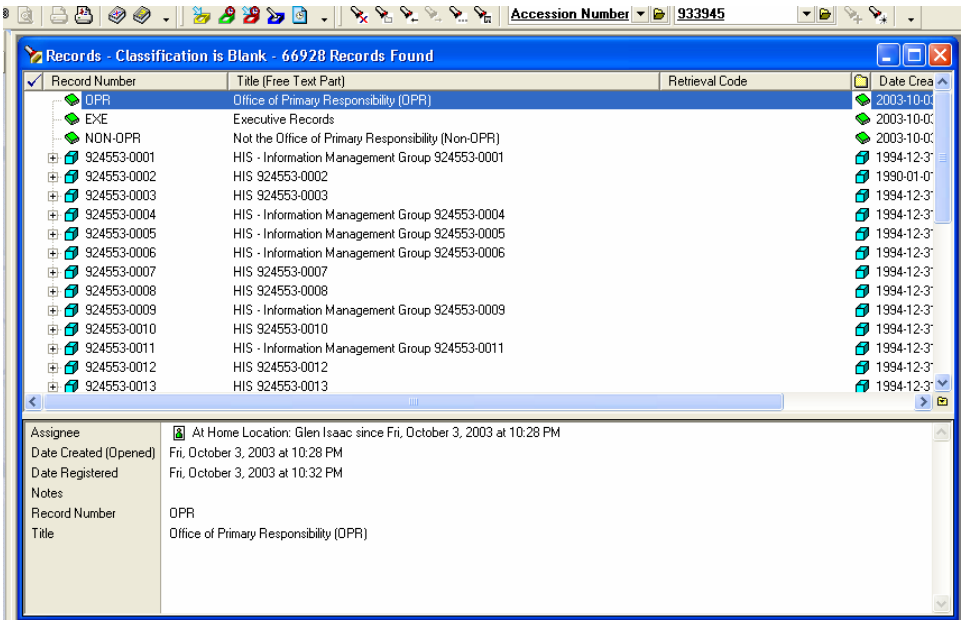

12.7 Count

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.

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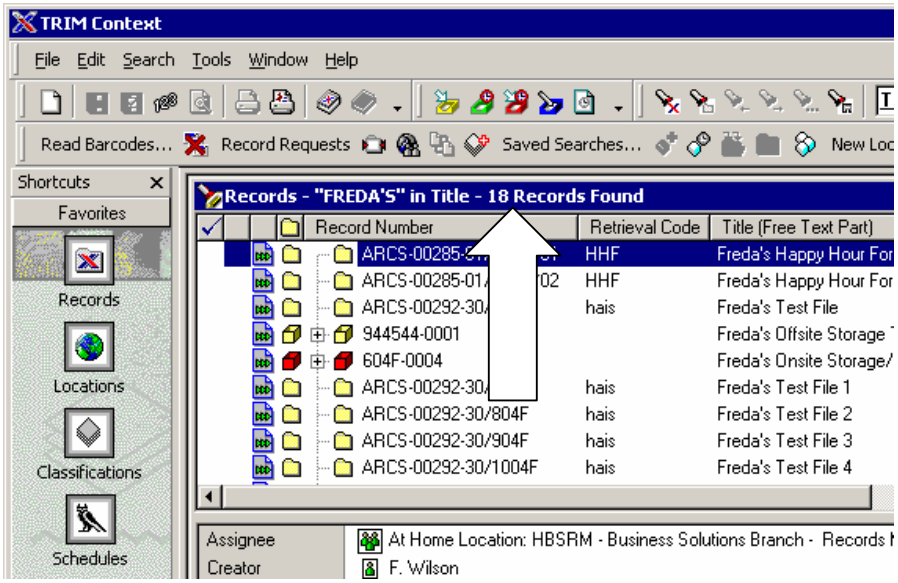

12.8 Refining a Search

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. (see 9.11)
C. Click *OK* to begin the new search.

12.9 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.**

A. 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 20 search methods used with the Quick Search

B. 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.

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C. Press Enter on the keyboard once you have filled in both fields, and the search results will be displayed.

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

12.10 Meta-variables

When performing 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 (04/05/05) 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

The meta-variables are accessed by clicking the drop-down list from the calendar in a date field and choosing the appropriate meta-variable.

12.11 Advanced Searching

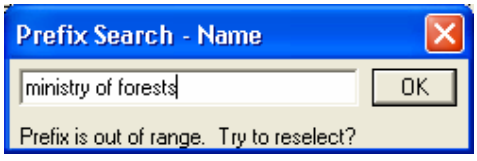
If required you can combine Search Methods to narrow a search result. This function can be done in a new Search, or when refining a Search;

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:



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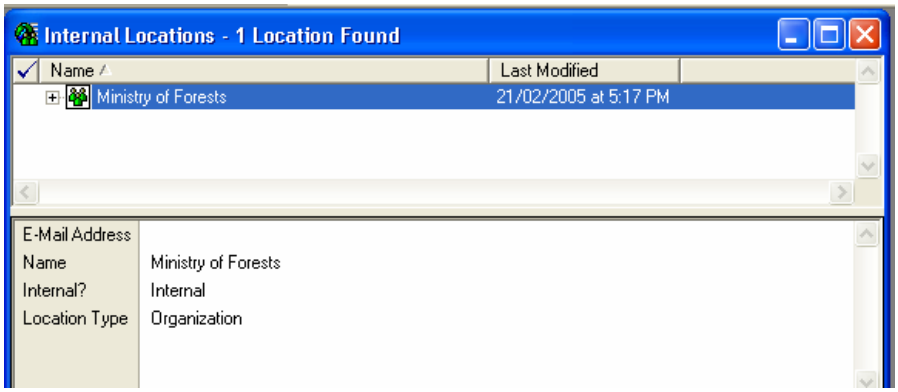
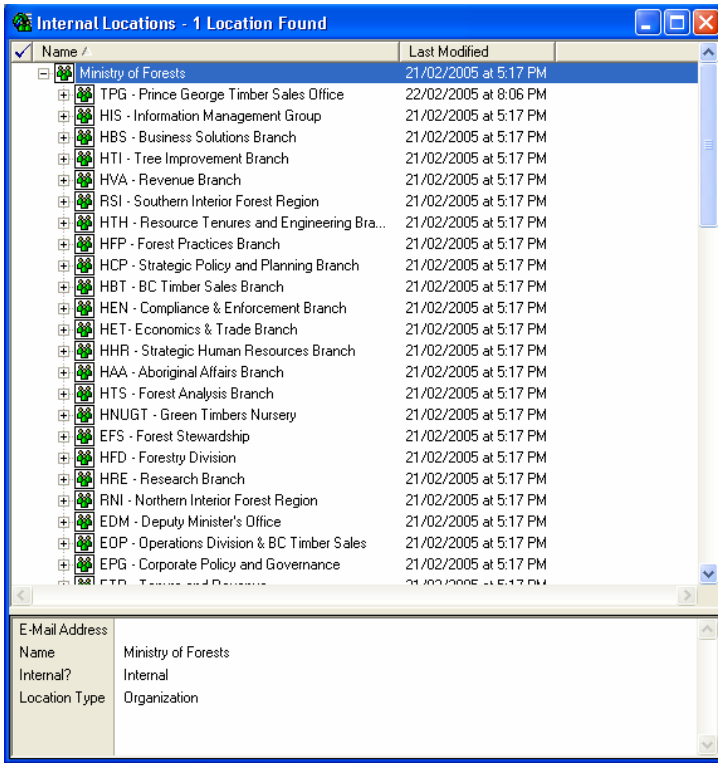
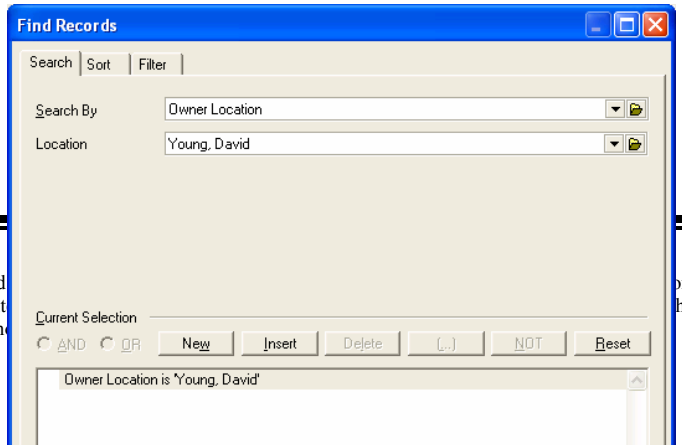
This will return the Ministry of Forests Location:



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



12.12 Other Advanced Features



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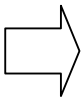

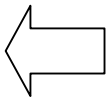

New: The **New** Button adds a new line to your search at the bottom of your existing criteria.

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.

12.13 Other Search Functions

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

Current Search		

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	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.

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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

12.14 How Do I Search for Records?

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.

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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

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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.

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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

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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 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 (defaluts to the logged in user) in the **Location** field or leave it as is.
6. Click *OK* to begin the search.

Exercise 17 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.

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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 18 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 19 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.

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12.15 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. 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?
   _____

9. What is a Meta-variable?
   _____

   _____

10. List some of the Meta-variables.
    _____

    _____

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12.16 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 Meta-variables
6. Use some of the advanced features

You should now be able to use the different search functions in TRIM and be able to perform different types of searches.

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13. Saving Searches

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.

13.1 Objectives

In this Chapter you will learn:

1. How to Save Searches
2. How to Use Saved Searches

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.

13.2 Saving 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** to go to the Access Control screen. You can modify the access to this Saved Search if required.
   d. Click **Next**
   e. The Search Details will be displayed again. If required, edit these details.
   f. Click **Next**.
   g. Set any appropriate sort details.
   h. Click **Next**.
   i. Select any appropriate filters.
   j. Click **Finish**.

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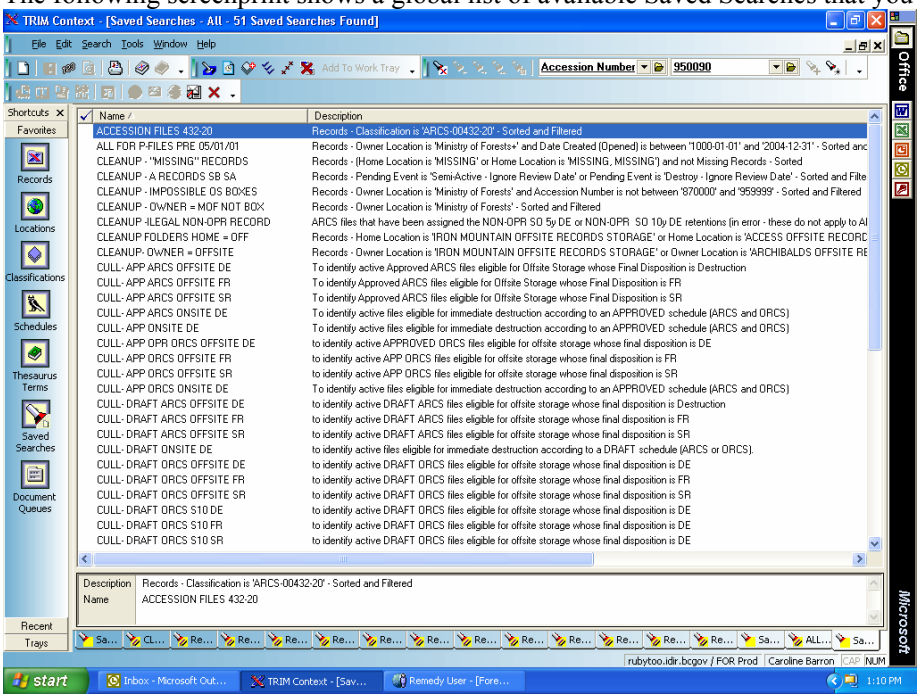
When saving searches that use dates don't forget you can a meta-variable instead of a fixed date.

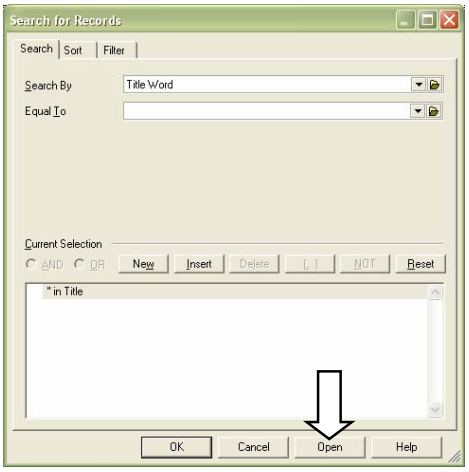
13.3 Accessing a Saved Search

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:



Note: Saved Searches can also be accessed through the **Open** button on the bottom of the Search screen:



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13.4 How Do I Save Searches?

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. You can change the description at this point if you wish, otherwise press **Next** to 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 search screen entries and go to the next screen.
9. Click the **Next** button to accept the sort fields that you have chosen and go to the next screen.
10. Click the **Finish** button to accept the record types in the filter tab and complete the Saved Search information.
11. Click the **Saved Searches** button on the RMC toolbar to see the newly saved search.
12. 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. (Use the meta-variable **today** and not the date registered.
4. Save the search as: **Records Registered Today.**
5. Locate and run the newly saved search.

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13.5 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. Can a saved search be modified?
   a. Yes.
   b. No.

2. How is a Saved Search accessed in TRIM?

   _____

   _____

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

   _____

   _____

4. Can a saved search be removed from the list of saved searches?
   a. Yes.
   b. No.

5. What type of saved search could be used to identify calendar year files that are still open from the previous year?

   _____

   _____

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

   _____

   _____

   _____

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13.6 Summary

In this Chapter you learned:

1. How to Save Searches
2. How to Use Saved Searches

You should now be able to save and use different types of saved searches.

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14. 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.

14.1 Objectives

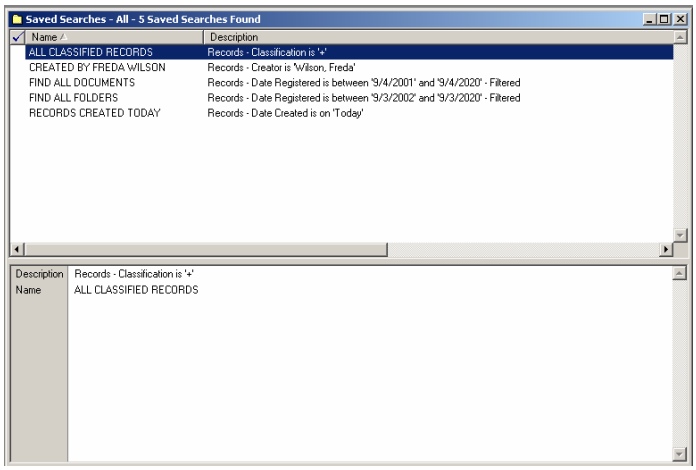
In this Chapter you will learn how to:

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.

14.2 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 f**rom 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:

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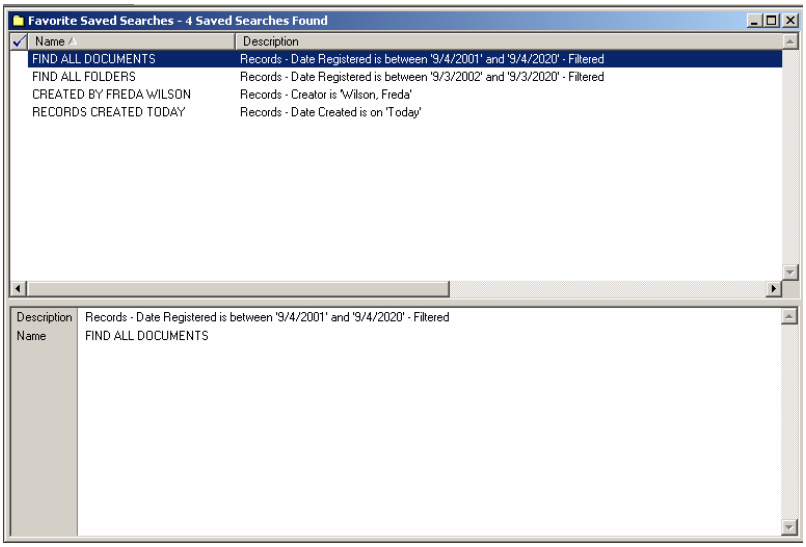

You will be able to add any of the saved searches already created by the TRIM Administrator to your Favorites.

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.

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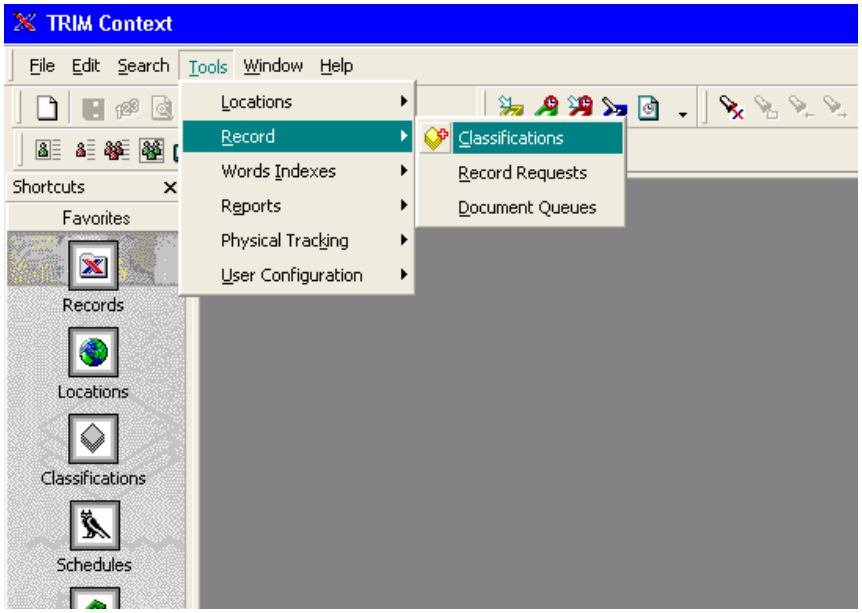
14.3 How Do I Add Classifications to Favorites?

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:

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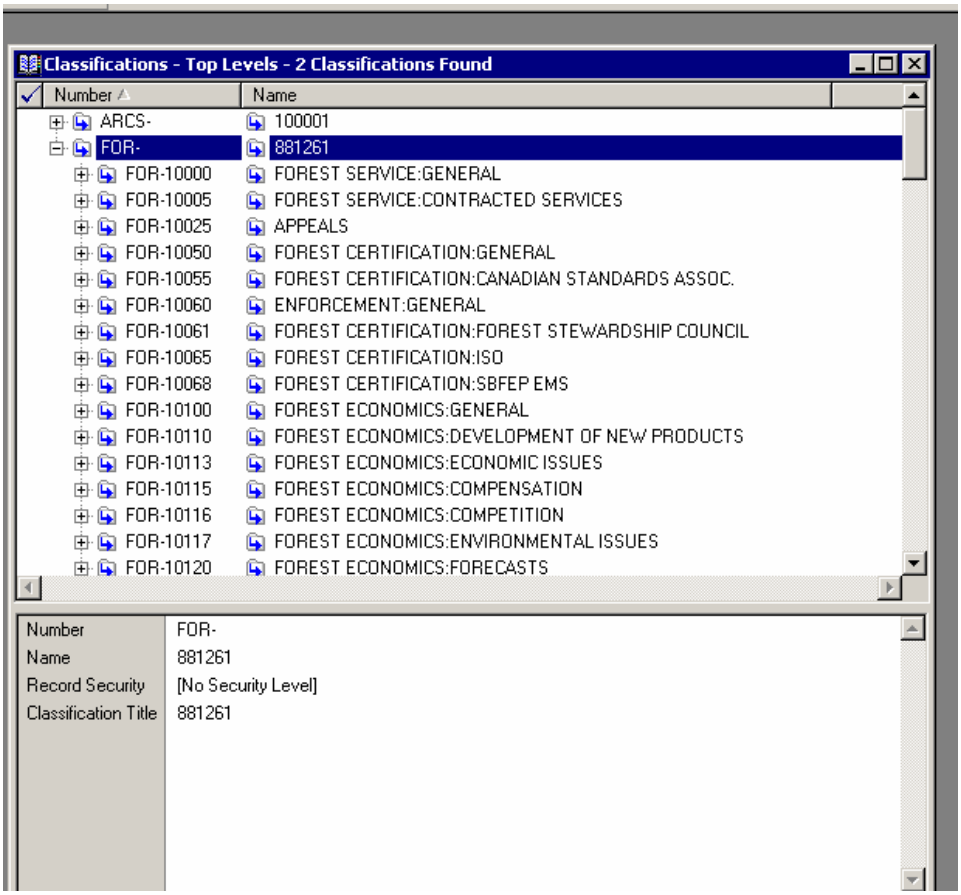
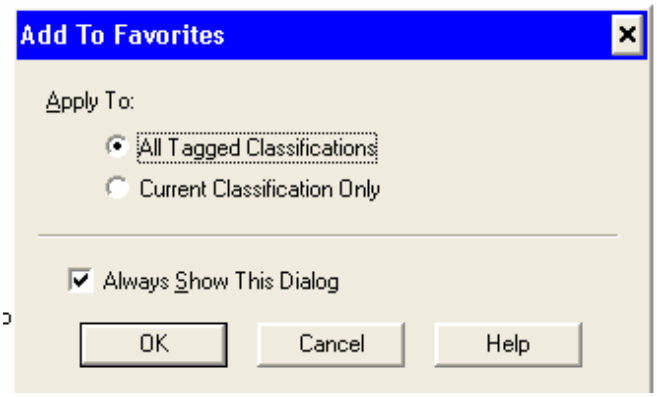


B. Expand the ARCS/ORCS levels of classification that you use on a regular basis.

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.

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14.4 How Do I 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. Highlight the classification you wish to remove.

C. Choose **Edit|Remove From>Remove from Favorites** from the Menu or, right-click and choose **Remove From>Remove from Favorites**.

D. 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

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. Tag the **ORCS Top Level Classification FOR-10110**
4. Press **[F4]** to add to **Favorites**.
5. The Classifications are now added to Favorites.
6. Click the Classifications button on the Favorites toolbar.
7. 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.

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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. Highlight the classification you wish to remove.
3. Right-click and choose **Remove From>Remove From Favorites.**
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.

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14.5 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.

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14.6 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.

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15. Shortcut Keys

15.1 Objectives

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

Records:

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

Menus:

[Alt][F], x	**File|Exit**
[Alt][E]	**Edit|Menu**
[Alt][S], C	**Search|Current Search**

Help:

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

Drop-Down List Box:

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

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Searches:

[Ctrl][F]	**Find Records**
[Ctrl][G]	**Open the Saved Searches window**
[Ctrl][F3]	**Browse via Classifications**
[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:

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

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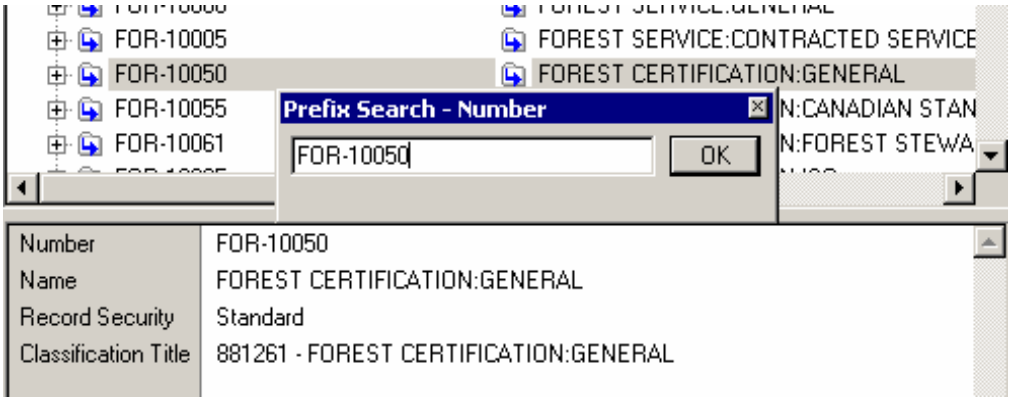
16. Tips and Tricks

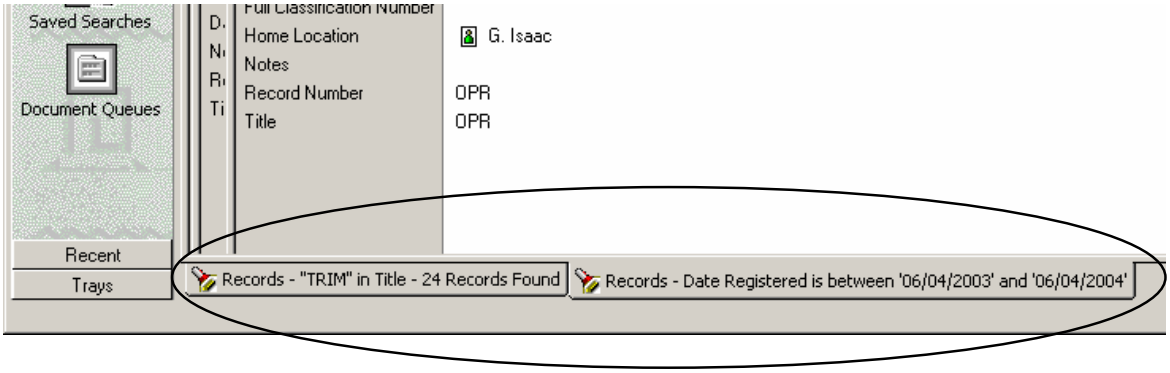
16.1 *Prefix Search*

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.



16.2 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.



16.3 Drag and Drop

You can drag and drop records into containers such as files into boxes.

Search for the records and the container into which the records will be filed.

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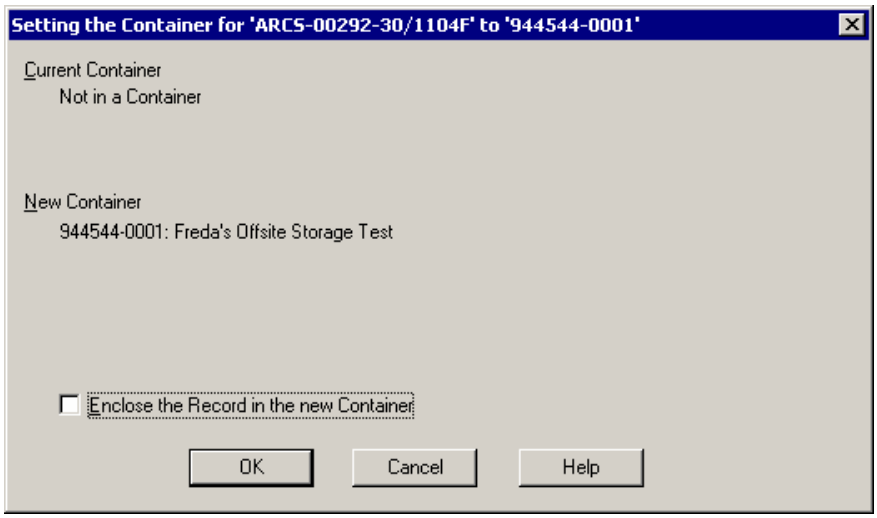
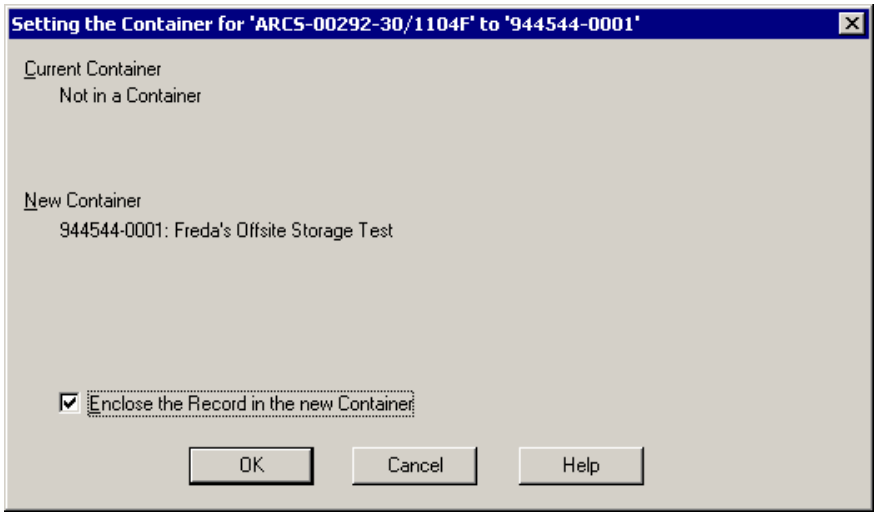
Tag the records to be contained and then drag and drop them onto the container. The following dialogue box will appear:



Check the **Enclose the Record in the new Container** checkbox:



Click *OK* to confirm that the records will be enclosed in the container.

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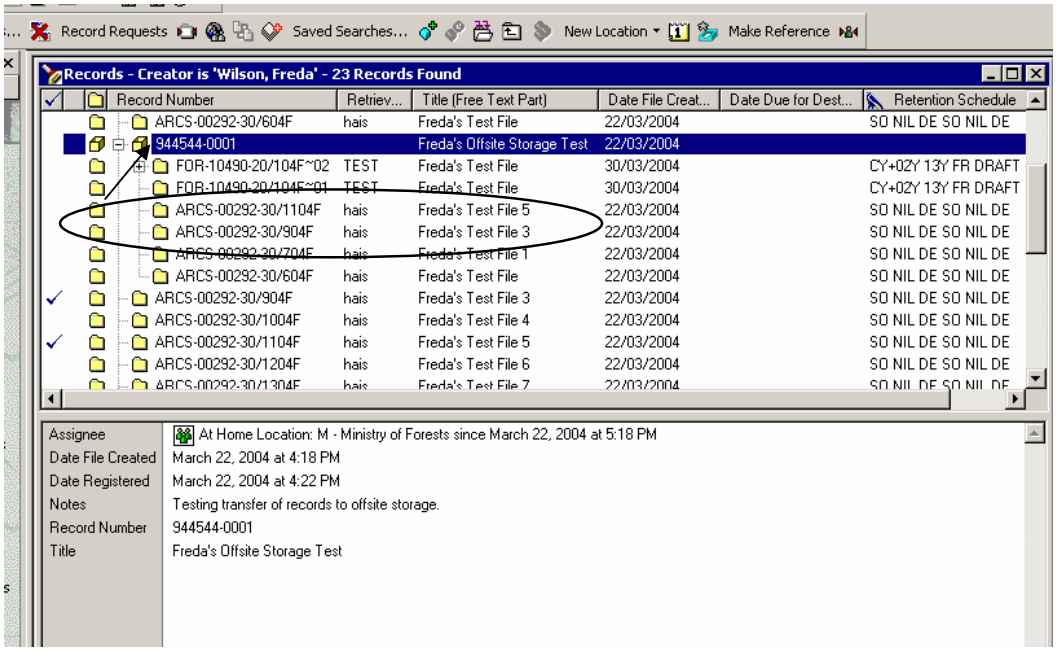
The search results screen will show the files contained in the new container.



Note that Freda's Test File 3 and Test File 5 are now contained in Box Record No. 944544-0001.

The RMC Toolbar

The RMC Toolbar is a custom toolbar created in TRIM Context. Please contact your local TRIM support person if you require help creating this toolbar. Right-click on the toolbar at the top of the main Context screen and check the RMC Toolbar to turn it on. It should look similar to the following:

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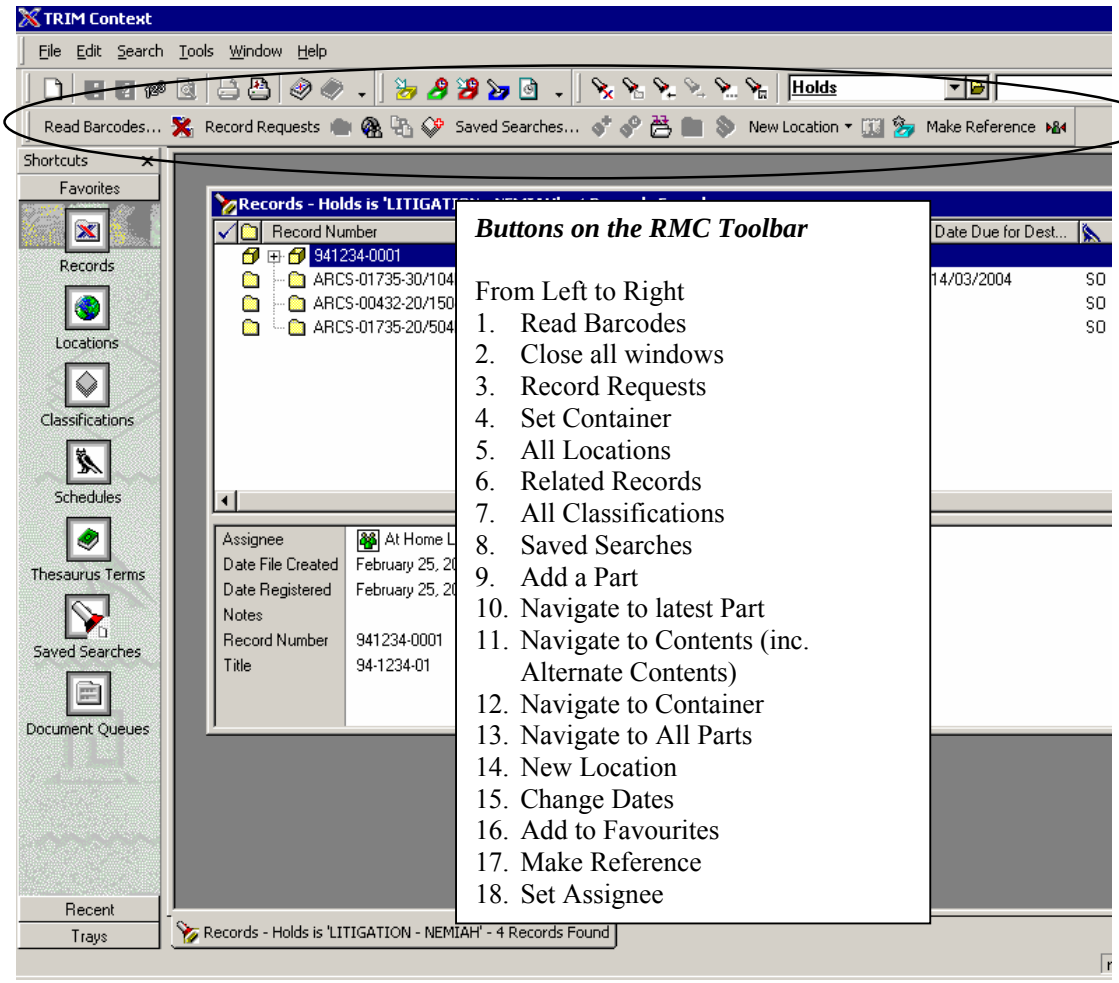
1.



16.4 Set Assignee

To change the Assignee when checking out records, click the Assignee button on the RMC toolbar.

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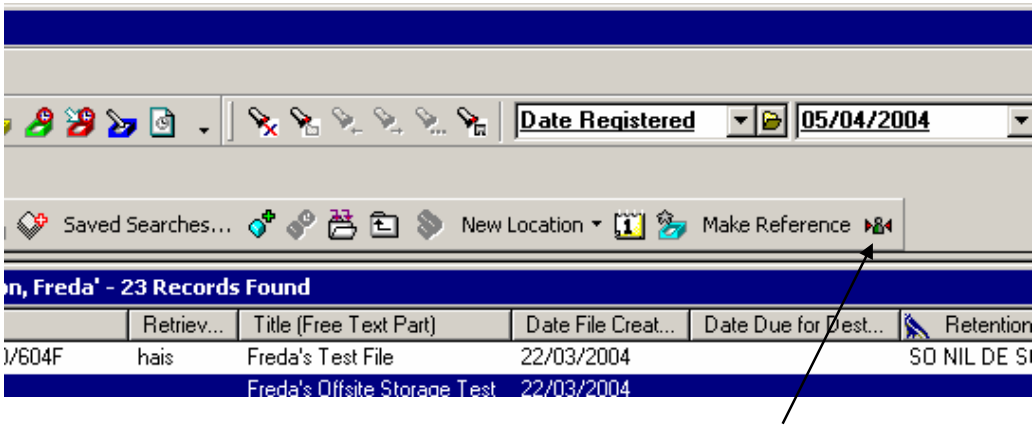
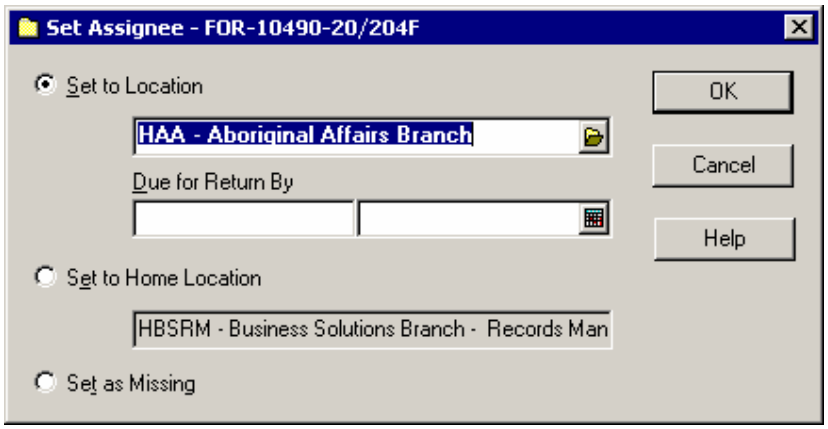


The Set Assignee Dialogue Box will open.



Click the KwikSelect button and choose the appropriate Assignee from the Locations List.

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17. Whom Do I Call for Help?

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

17.1 TRIM Help

Contact the following for assistance with the TRIM application:

Telephone Number:

E-**mail Address:**

17.2 Records Help

Contact the following for assistance with Records Management functions:

Telephone Number:

E-**mail Address:**

17.3 Computer Help

Contact the following for assistance with your Computer:

Telephone Number:

E-**mail Address:**

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18. Glossary of Terms and 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

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	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.
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 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.

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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: • 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: • 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

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	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	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. The Interpretation Act (RSBC 1996, c. 238, s. 29) defines "record" as follows: "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. Government records include machine-readable records, data stored in information systems, film, audio and audiovisual tapes, etc. 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. 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) The retention and final disposition of most government records is governed by the Document Disposal Act.
-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.

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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 tile, 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.

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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: • 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 System)	Means an application used in the ministry to create files, track boxes, generate reports and to check records schedules.
-R-	
RA	Records Analyst.
RC	Records Custodian.

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RCS	Records Centre Services (part of CRMB).
Record	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." (*Australian Standard AS 4390-1996, part 1, clause 4.21*) In the BC government, the record is the indivisible unit for records management processes. Information, regardless of medium, detailing business transactions. A catch-all term for anything that might be classified and filed, including files, documents, etc.
Record Number	
Record Type	In TRIM, a means of categorizing files. Similar in concept to a 'template' or some type of record.
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	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). Specifically, a records schedule is a list which describes records and indicates: • 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 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:

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	• 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 (*ARCS/ORCS*), 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 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.

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	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.
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	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. ORCS and ARCS usually classify subject files under secondary numbers and titles between -02 and -19.
Supplementaries	Supplementaries identify material related to a particular file but cannot be physically located within the parts of a file. For example: • Alternate media types (oversize maps, videotapes etc.) Enclosure file (FOI request files = main file + supps; supps = photocopies of requested material
-T-	
TRIM	Total Records Information Management, an electronic records and

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	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: • 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	See "Part".
	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 *Requirements*. Volume in Gov't terms = Part in TRIM
	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).
-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-	

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20. Answers to Chapter Questions

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

20.1 Chapter 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.

20.2 Chapter 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.

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

20.3 Chapter 4 – Filing Electronic Documents using TopDrawer

1. **What are the different types of TopDrawer?**
   a. Standalone
   b. ODMA
   c. Shell
2. **How do you set the Default Dataset in TopDrawer?**
   Through User Configuration Options in TRIM Context.
3. **Explain the Difference in File Statuses of Draft, Modified and Original Documents in TopDrawer**:
   a. Draft – Document has never been checked into TRIM.
   b. Original – Document has been checked out of TRIM for editing.
   c. Modified – Document has been checked out of TRIM, modified and is ready to be checked back into TRIM.
4. **How does ODMA TopDrawer differ from the Standalone Version?**
   ODMA provides the option to bypass TopDrawer and save directly to a local/LAN drive.
5. **What is the Look-in Bar?**
   Displays a list of documents as well as a list of rec. Preently used folders.
6. **All TopDrawer components have the same functionality.**
   a. False

20.4 Chapter 5 – TRIM Desktop

1. **The TRIM Desktop allows you to search and edit records without having to log into TRIM Context.**
   a. True
2. **How do you set the default dataset in Desktop?**
   You can't. The default dataset must be set through TRIM Context or TopDrawer.
3. **What is the purpose of the Shortcuts Toolbar?**
   Easy access to Farite functions in TRIM.
4. **What are the three different views available in the View Pane?**
   a. Properties
   b. Preview
   c. Revision

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20.5 Chapter 6 – E-MAIL and TRIM

1. **How do you integrate TRIM with Outlook?**
   Turn on integration through User Configuration Options in TRIM Context.
2. **E-mail messages and their attachments cannot be catalogued separately.**
   a. False
3. **You must switch from Outlook to TRIM when searching for records.**
   A. False
4. **What are the three ways to catalogue e-mails?**
   a. E-mail messages only
   b. E-mail messages and attachments
   c. Attachments only.
5. **What are Linked folders in Outlook?**
   A folder in Outlook where e-mails are automatically processed and contained in a pre-defined folder/container in TRIM.
6. **Can a record be sent via e-mail from within TRIM?**
   a. Yes
7. **How do you change the TRIM dataset in Outlook?**
   Through the TRIM Menu on the toolbar and selecting Settings.

20.6 Chapter 7 - 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

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20.7 Chapter 8 - 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.

20.8 Chapter 9 - 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.

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20.9 Chapter 10 - 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.

20.10 Chapter 11 - 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

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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.

20.11 Chapter 12 – 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.

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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.

20.12 Chapter 13 - 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.

20.13 Chapter 14 – 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.

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