

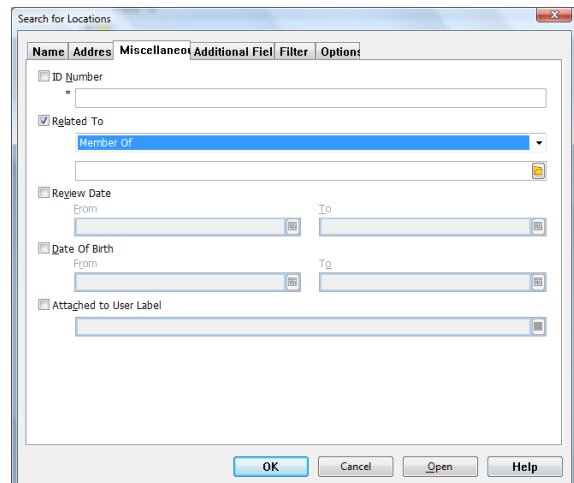
EDRMS TRIM Tip Checking Locations

Primary Audience: Information Workers with responsibility to manage locations

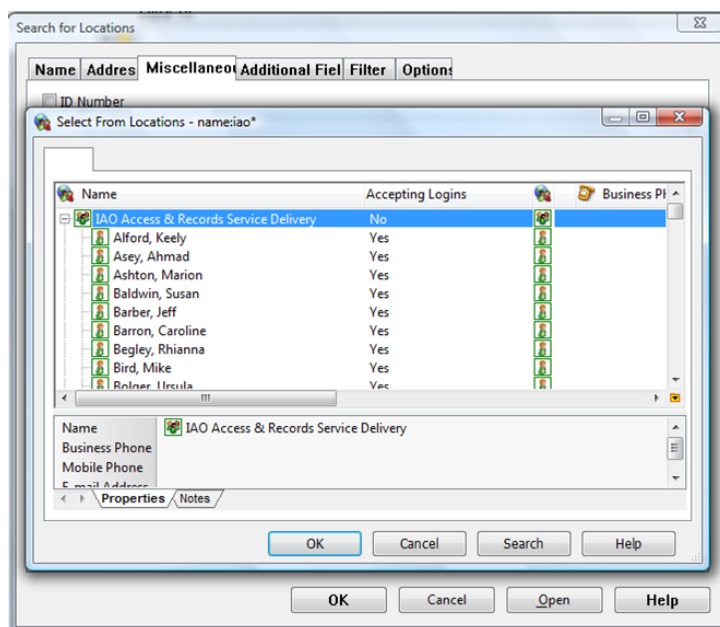
Review the TRIM settings for individuals listed under your organizational unit on a regular basis to ensure that those who are no longer part of your organization are unable to logon and that all users have appropriate access settings.

To search for users in your location:

1. Click **Search | Find Locations**.
2. Click on the **Miscellaneous** tab.
3. Click on the **Related to** checkbox. It will default to Member of in the dropdown selection. Type in the name of the organizational unit into the text field underneath, or click on the yellow Kwikselect folder to open up a search.
4. Sort the list of names alphabetically and add the **Accepting Logins** and **Active?** columns to your list screen.



*Users who have moved outside of government or to an organization that does not use TRIM should have **No** in the **Accepting Logins** column and **Not Active** in the **Active?** category.*

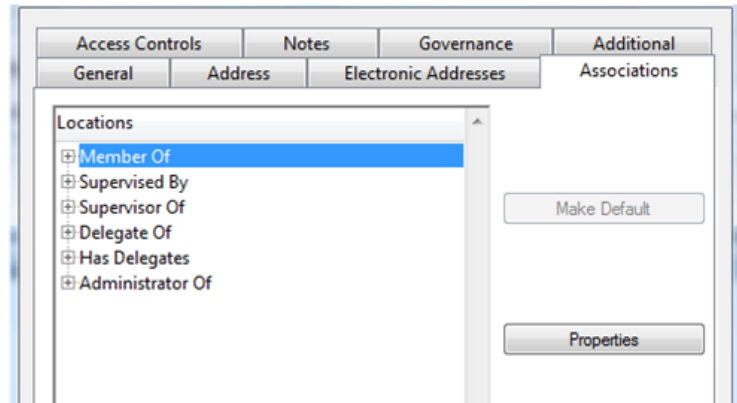


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To review the access group settings for an individual in your organizational unit, highlight an individual entry, right-click and select **Properties | Associations**.

Users who have moved to an government office without TRIM or outside of government should remain associated only with the default access group.

Users that have gone to another office that has TRIM should have no access group associations.



If, as a result of this regular review, you identify a required change, send a TRIM reference of the relevant location to EDRMS Help, along with an explanation of the change required (e.g., employee retired, transferred, etc; on what date).