

## Government Records Service

### TRIM Training

#### Course Path

Using TRIM for...	Course(s) to take
Filing Emails and Documents, Searching	TRIM End User Basics
Creating folders	TRIM Folder Management
Both of the above	TRIM End User Basics and TRIM Folder Management, in any order
Both of the above, in addition to an offsite transfer/onsite destruction	TRIM Folder Management then TRIM Disposition Processing. TRIM End User may be taken before or after these 2 courses.
Managing physical records (not for electronic)	TRIM Folder Management
Managing physical records only and for processing an offsite transfer/onsite destruction	TRIM Folder Management then TRIM Disposition Processing

**Course Title:** TRIM End User Basics

**Duration:** Half Day (4 hours)

**Prerequisite(s):** IM 110 & 112; or Orientation to Records Management; or Managing Government Records online module

**Who should take this:** Anyone who needs to know how to use TRIM to manage electronic documents. Participants usually have TRIM already installed or are part of an upcoming TRIM implementation.

**Description:**

This half day course on managing electronic records using TRIM desktop covers set-up and configuration, cataloguing email (filing), searching and retrieving documents, and using TRIM references for better information sharing. This course deals with common file types such as Word and email messages. Included are practical strategies and tips for effective document management, including exercises which walk you through cataloguing email and attachments, time saving linked folders for more effective cataloguing, and managing a document from creation to finalization. The focus is on TRIM Desktop end user functions, hands-on exercises, and how these TRIM functions fit into business processes.

**Where to Register:** <https://learning.gov.bc.ca/psp/CHIPSPLM/EMPLOYEE/ELM/h/?tab=DEFAULT>

**Course Title:** TRIM Folder Management

**Duration:** Full Day

**Prerequisite(s):** A good understanding of government records management principles and practices with experience using ARCS/ORCS; Orientation to Records Management; or IM 110 & 112; or Managing Government Records online module

**Who should take this course:** Information workers who need to know how to make use of TRIM in their organisation. An information worker is typically someone who has recordkeeping responsibilities for their organization, such as managing on-site physical folders and/or supporting the proper management of electronic records.

**Description:**

This one day course is about how to apply appropriate records management controls to your office records using TRIM to create and maintain folders for the on-site organization for both physical & electronic records. The focus is on TRIM information worker functions using hands-on exercises.

**Where to Register:** <https://learning.gov.bc.ca/psp/CHIPSPLM/EMPLOYEE/ELM/h/?tab=DEFAULT>

**Course Title:** TRIM Disposition Processing

**Duration:** Full Day

**Prerequisite(s):** Must complete TRIM Folder Management prior to taking this course.

For a thorough understanding of retention schedules and disposition processing we recommend our one day course titled Records Disposition Processing (Without TRIM/CRMS).

Who should take this: TRIM Information Workers who are tasked with processing records eligible for off-site storage or onsite destruction.

**Description:**

This one day course on using TRIM to transfer records to off-site storage and process records for destruction covers strategies for completing these types of projects, practical tips on boxing records, and a walk through the completion of a transfer and a destruction project in TRIM, including the completion of related forms. The focus is on TRIM information worker functions, hands-on exercises, and how these TRIM functions fit into the transfer and destruction policies and processes.

**Where to Register:** <https://learning.gov.bc.ca/psp/CHIPSPLM/EMPLOYEE/ELM/h/?tab=DEFAULT>