TRIM Electronic Documents and Email Training Guide

TRIM version 7.21 Build 3519

Information Access Operations
## REVISION HISTORY

<table>
<thead>
<tr>
<th>DATE</th>
<th>VERSION</th>
<th>CHANGES</th>
<th>AUTHOR</th>
</tr>
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<tr>
<td>2008-11-19</td>
<td>1.0</td>
<td></td>
<td>CRMB</td>
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<tr>
<td>2010-02-08</td>
<td>1.1</td>
<td>Minor corrections (e.g., typos, formatting, screen shots, wording)</td>
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</tr>
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<td>2010-02-24</td>
<td>1.2</td>
<td>Updated process to integrate Excel and to save Excel documents to TRIM</td>
<td>IAO</td>
</tr>
<tr>
<td>2011</td>
<td>2</td>
<td>Complete update for TRIM 6.2.5</td>
<td>IAO</td>
</tr>
<tr>
<td>2012-11</td>
<td>3.1</td>
<td>Interim update for TRIM 7.2.1</td>
<td>IAO</td>
</tr>
</tbody>
</table>
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1. Introduction - A Tour of TRIM

1.1 Objectives

In this section you will learn:

1. What TRIM is.
2. Some general guidelines for using TRIM.
3. Different user roles in TRIM.

1.2 What is TRIM?

TRIM stands for Total Records and Information Management. It is an integrated Enterprise Document and Records Management System (EDRMS) capable of managing the full range of corporate information. The Government of British Columbia has selected HP TRIM™ as the standard information management software program to be used across government.

TRIM provides the capability to record and manage the complete life cycle of a ministry’s information – from creation, to retention and use, and to destruction or archival preservation.

1.3 TRIM Components

HP Context – refers to the ‘background’ component of TRIM, which provides all of the advanced functions required by the TRIM Administrator, Information Managers and Information Workers. It is the storage repository for electronic records and for tracking information about physical files. Eventually, TRIM will replace the LAN for document storage.

TRIM Desktop - TRIM Desktop allows users to access the HP TRIM search and edit functions without having to log into HP TRIM. TRIM Desktop includes the same right-click functionality as is available from HP TRIM.

TRIM Offline Records – Offline Records is the area where records or draft documents can be stored and edited without changes being committed to the corporate HP TRIM database until the user checks in the document. This is the end user’s private working area, not accessible to others.

Note: All End Users should use TRIM Desktop
1.4 General Guidelines for Using TRIM

1.4.1 What goes into TRIM?

All electronic documents and email messages that document the ministry’s business should be stored in TRIM. This includes any and all information with administrative, operational, legal, fiscal, audit or other value. TRIM can store all common electronic document types.

Research information, articles or papers downloaded from the Internet can also be stored in TRIM. Articles directly related to business activities will go into TRIM with related business documents. Research papers gathered for informational purposes can be stored as “library and reference materials” in TRIM.

1.4.2 What doesn’t go into TRIM?

Transitory records should not be stored in TRIM. This includes items having temporary usefulness that do not document ministry business decisions or transactions (e.g., email “Do you want to set up a meeting for next week?”).

Personal (non-work) email messages and personal documents (e.g., your resume) should not be stored in TRIM.

MS Access and other small database programs do not get stored in TRIM.

Shortcuts to LAN documents do not go into TRIM.

1.5 TRIM Roles

Users are assigned a specific role in TRIM. TRIM offers several different types of roles. The standard roles are described below.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>End User</td>
<td>Basic User. This role allows you to search for and save documents and email messages in the TRIM database.</td>
</tr>
<tr>
<td>Information Worker</td>
<td>Your Information Worker is your first line of support for TRIM. Information Workers can create electronic and physical folders in TRIM. Information Workers also manage folders (e.g., reclassifying a folder, printing reports and labels, box maintenance).</td>
</tr>
</tbody>
</table>

Note: DO NOT password protect files within the application (e.g., Word). Security requirements are taken care of within TRIM.
### Information Manager

The Information Manager is responsible for many administrative functions within the TRIM database (e.g., adding and removing users, setting up record types within TRIM, correcting data errors). Information Manager roles are restricted to specified records experts at Information Access Operations (IAO) Branch.

### TRIM Administrator

The TRIM Administrator has advanced system administration capabilities. This role is limited to a small number of IAO staff with Administrator responsibilities in TRIM.

#### 1.6 TRIM Support

The first point of contact for issues relating to the system operations for TRIM is the EDRMS Help team: [EDRMS.HELP@gov.bc.ca](mailto:EDRMS.HELP@gov.bc.ca)

#### 1.7 Glossary of Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalogue*</td>
<td>To save an email into TRIM</td>
</tr>
<tr>
<td>Check In*</td>
<td>Save a document into TRIM from Offline Records</td>
</tr>
<tr>
<td>Check Out</td>
<td>Check a document out of the TRIM database so that you can edit it</td>
</tr>
<tr>
<td>Container</td>
<td>Most often is a folder, but could also be a box</td>
</tr>
<tr>
<td>EDRMS</td>
<td>Enterprise Document and Records Management System</td>
</tr>
<tr>
<td>KwikSelect</td>
<td>A KwikSelect field is a field where data may be entered or where you may invoke, through use of the KwikSelect button, TRIM’s advanced selection facilities.</td>
</tr>
<tr>
<td>Metadata</td>
<td>Data about data; basic information like author, date created, etc.</td>
</tr>
<tr>
<td>Record Type</td>
<td>A TRIM term referring to a set of records, usually those belonging to a specific business unit</td>
</tr>
<tr>
<td>Register*</td>
<td>To save a document into TRIM</td>
</tr>
<tr>
<td>Tag</td>
<td>To select an item on a TRIM list by clicking in the white space to the left of the item until a check mark appears</td>
</tr>
<tr>
<td>Transitory Records</td>
<td>Transitory records are records of temporary usefulness that do not need to be filed in TRIM and can be managed under approved special schedule for Transitory Records <a href="http://www.gov.bc.ca/citz/iao/records_mgmt/special_schedules/transitory_records.html">http://www.gov.bc.ca/citz/iao/records_mgmt/special_schedules/transitory_records.html</a></td>
</tr>
<tr>
<td>TRIM</td>
<td>Total Records and Information Management</td>
</tr>
</tbody>
</table>

*The words ‘Register’, ‘Catalogue’, and ‘Check In’ are used throughout; all refer to saving documents into TRIM.
2. Searching in TRIM

TRIM Desktop has a variety of search methods that you can use to locate records and other information.

2.1 Objectives

In this chapter you will learn:

1. How to perform searches and use filters.
2. About the List and View Pane screens.
3. How to use the Count function.
4. How to refine a search.
5. How to use compound searches (AND/OR).
6. How to search for your office folders and documents.

2.2 General Search Concepts

**Partial matches**: Unlike Google™, TRIM does not automatically execute a partial match search. It will not search for a plural if you search on a word. For example, searching on “Olympic” will not find any records that may contain the word “Olympics”. To do a partial match search in TRIM you must put an asterisk * at the end of the text. The asterisk wildcard also can be used between words or at the beginning of a word.

**Phrase searching**: Most searches in TRIM are word searches only. However, you can search for phrases within documents using document content or email document content.

If you search for title = blue sky, TRIM will search for records containing both the word blue and the word sky in the title (not necessarily together).

Searching in TRIM is not case sensitive.

It is better to avoid punctuation and diacriticals (marks like backslashes) in your document and folder titles. If you must use them or search on them, check Section 6 for guidelines.
2.3 Basic Title Word Search

A. Click the **Find** icon on the TRIM toolbar to launch the **Search for Records** dialogue box.

B. Click on the **KwikSelect** icon next to the **Search By** field to choose the type of information you want to find.

C. Choose **Text Search**, and then **Title Word**.

D. Type a value in the **Equal To** field or select from the drop-down list if this search type has been used previously.

E. Click **OK** to begin the search. The screenshot below shows an example of a search result window.
2.4 Search Results – Folders, Documents and Boxes

TRIM Desktop displays electronic and physical folders, documents and boxes in the search results window.

2.4.1 Electronic Folders

Electronic Folders (e-folders) are represented by a yellow folder icon. E-folders contain physical folders (blue folder icons) and electronic documents. Physical folders show hierarchically below their related electronic folders, along with any contained electronic documents.

Click on the plus icon beside the folder to expand the folder and see its contents. The following screenshot shows an electronic folder that contains electronic documents and a physical folder that contains physical documents:

A physical folder and its contents may be contained within a related electronic folder.
2.4.2 Electronic Documents

Electronic documents are represented by the application icon in which they were created. For example, a Word document will have the Word icon next to the record number in the search results window.

End users create electronic documents and file them into the appropriate electronic folders created by their Information Worker. Electronic documents can be checked out to Offline Records for editing purposes and checked back into TRIM.

The following screenshot shows several different types of electronic documents saved into the electronic folders.

Note: Each record type (e-folder, p-folder, or document) has its own view for each branch.
2.4.3 Physical Folders

Physical Folders (p-folders) are represented by a blue folder icon. They represent the physical, paper files and other physical media such as binders, DVDs, videos, etc.

P-folders are often related to a corresponding electronic folder. Older physical folders migrated to TRIM may not have corresponding electronic folders.

Note: Information Workers create physical folders. End users cannot create physical folders.

2.4.4 Physical Documents

Physical documents can be tracked in TRIM to make them easier to locate.

Note: To add a physical document to TRIM, contact your Information Worker.
2.4.5 Boxes

Boxes are represented by a box icon. Boxes with a blue coloured lid contain folders that have been transferred to offsite storage. Boxes with the reddish coloured lid contain folders that have been destroyed.

Electronic documents within e-folders “in” offsite storage boxes are still available to the End User. Electronic documents within e-folders in destroyed red boxes are no longer available; only the descriptions of the documents (metadata) remain. *e-folders are not physically located within an off-site box, but are linked to the box so they are scheduled at the same time as the p-folders they are related to.

Note: See chapter 6 for list and view pane formatting instructions and recommended fields
2.5 Search Results - List and View Panes

The **Search** result window is divided into two parts: the **List** pane on the top and the **View** pane on the bottom. Each pane displays different information about the selected record.

You can customize the **List** and **View** pane fields. The **List** pane needs to be customized only once, whereas, the **View** pane must be customized individually for each record type. The customized views are specific to your user id and the computer you are using.
2.5.1 Preview Function

The **Preview** tab at the bottom of the view pane allows you to preview the document or email message that you have highlighted.
2.6 Search Categories

To view the different search options:

A. Click the **Find** button on the toolbar OR select **Search | Find Records** from the menu.

B. Click the **KwikSelect** button beside the **Search By** field to access the search categories.

C. Click on the **Contacts, People and Places** to expand the Contacts, People and Places search category, for example.
D. If you select **Creator**, your name will appear as the default creator. Click **OK** to run the search.
## 2.7 Commonly Used Searches

<table>
<thead>
<tr>
<th>Category</th>
<th>Sub-category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dates</td>
<td>Date Registered</td>
<td>Searches documents and folders based on the date range in which the document or folder was saved in TRIM.</td>
</tr>
<tr>
<td>Contacts, People and Places</td>
<td>Creator</td>
<td>The person who put the document, email or folder into TRIM. If searching for both names, use the Lastname, Firstname.</td>
</tr>
<tr>
<td>Contacts, People and Places</td>
<td>Author</td>
<td>The author of an email or document.</td>
</tr>
<tr>
<td>Contacts, People and Places</td>
<td>Owner</td>
<td>The office (e.g., branch) to which the document or folder belongs.</td>
</tr>
<tr>
<td>Additional Fields</td>
<td>Several choices</td>
<td>Fields that may or may not be applicable to your branch/ministry.</td>
</tr>
<tr>
<td>Text Search</td>
<td>Any Word</td>
<td>Searches both the Title field AND the Notes field.</td>
</tr>
<tr>
<td>Text Search</td>
<td>Document Content</td>
<td>Searches the document content for a phrase. This includes emails and email attachments as well as documents within folders</td>
</tr>
<tr>
<td>Text Search</td>
<td>Title Word</td>
<td>Searches title fields of folders, documents and classifications.</td>
</tr>
</tbody>
</table>
2.8 Search Filters

You can filter a search, so that only certain records will be displayed in the search results window.

To filter a search, select the search category and enter the criteria, then click on the Filter tab to check the settings for your search.

You can narrow (or broaden) your search for records based on the following properties:

i. **Disposition** - refers to the position of a record within its records management lifecycle. In most cases, you will only search for **Active** records (e.g., your office’s current folders and documents); uncheck all others.

ii. **Record Class** – Not used, leave all checked.

iii. **Finalized Filters** – Set to **Either** to search for draft and final documents.

**Note:** Be careful when using the **Save as Default Filters** checkbox since TRIM will apply this filter to all subsequent searches.
iv. **File Types** – refers to the file type extension such as `.xlsx` for Excel documents, `.pptx` for PowerPoint documents or `.docx` for Word documents. You can search on more than one file type at once.

Filter settings can be saved by checking the **Save as Default Filters** checkbox. This action will force TRIM to only display those records that match the selected filters each time a search is conducted.

**Then click on the Record Types tab**

v. **Record Types** – Tag (check) the folder record types for the business unit(s) that you want to search, and your ministry document record type. See the section below on Tagging Items for more information about the tag function.

![Image of Record Types]

Choose your branch folder types and ministry document type

2.9 Tagging Items

TRIM has a tag function that is represented by a checkmark. Tagging is used in search results screens as well as several parts of the **Find Records** function. Highlighting an item is not sufficient to select an entry.

You can tag or un-tag a single item; or you can tag or un-tag multiple items through the right-click menu. There is also an **Invert All Tags** option that reverses the items checked and the items unchecked.

---

Note: The tag column does not always display a checkmark in the column heading. Be sure to click in the white space to the left of the desired item until a check mark appears.
2.10 Sorting a Search

Search results can be sorted to display in a specific order.

**Changing the Sort Order after performing the Search**

If you left click on a column heading in the List Pane of the Search Results window, TRIM will sort by that column. An arrow will display indicating whether the sort is ascending or descending. You can toggle from ascending to descending and back by clicking on the column heading. A small triangle will appear beside the column heading name to indicate the sort order.

<table>
<thead>
<tr>
<th>Sorted Ascending Order</th>
<th>Sorted Descending Order</th>
</tr>
</thead>
</table>

![Image of TRIM interface showing sorting options]
Setting the Sort Order before performing the Search

A search can be pre-sorted by up to three fields. The first field takes precedence, then the second and finally the third field. By default the Sort Field will be displayed in ascending order unless the Descending box is checked.

NOTE: Some fields, such as Retrieval Code, are not available when pre-sorting a search. To sort by Retrieval Code, click on the column heading after the search results are displayed.
2.11 Count

If the Count function is set to automatically count search results, the number of records returned in a search will appear in the title bar of the Search Results window. The count includes objects only at the top level. For example, folders found in the search will be counted, but not the contents of the folders.

2.12 Refining a Search

When the search result is not as expected you can refine your current search without having to re-enter your search criteria.


B. Your last search criteria will be displayed in a Find Records window. Change the search criteria as required (e.g., adding/deleting information, filtering or sorting). Click OK.

2.13 Compound Searching (AND/OR)

You can combine search criteria to narrow a search result.

A. Open a new Search or Refine (F7) an existing Search.

B. Enter the first search category and value. If refining a search, this will already be displayed.

C. Click the New button to insert a new search category. The first search category will be copied onto a new line.

D. Click on and highlight the new line and select a new search category and value by clicking on the KwikSelect icon beside the Search By field.
E. Select AND, or OR (default selection is AND).

AND will only return those records that meet all search criteria.
OR will return all records that meet any of the search criteria.

F. Repeat Steps C to E until all search criteria are entered.

G. Click OK.

2.14 Compound Searches for Records of a Single Branch

Typically, each office or branch has its own e-folder and p-folder record types. You can use the search filter to limit your search to the folders of a specific branch.

However, most ministry documents are covered by a single ministry-wide document type.

Therefore, if you want to search just for documents belonging to a single branch, you may need to search by Owner to specify the branch whose documents you are searching for.
You can use a compound search to combine a search by **Owner** with other types of searches. The screen print below shows an **AND** search including **Owner** and **Title**.

**Note:** When you are searching for documents or searching for both documents and folders, remember to include your ministry document type in your search filter.
2.15 Functions for Compound Searching

**New:** adds a new line to the bottom of your search.

**Insert:** adds a new line to the search above the currently selected criteria.

**Delete:** deletes currently selected search criteria from the Current Selection box.

**(...):** groups search criteria together or removes existing groupings. Lines that are bracketed are dealt with together as one, and will precede any other operations. The Brackets (…) button remains greyed out until two or more search lines are tagged.

**To add/remove brackets:**
- Click to the left of the search criteria to tag with a check mark.

Click on the Brackets button [ ] to add or remove brackets

**Not:** allows you to exclude records that have a specified value. The Not function will not work on the first search criteria in the Current Selection box.

**Reset:** deletes (once you confirm) all search criteria from the Current Selection box, allowing you to compose a new Search.
3. Email and TRIM

3.1 Objectives

In this section you will learn:

1. About managing email
2. How to catalogue email messages into TRIM
3. How to send an email message with a TRIM reference

3.2 Guidance on Managing Email

Emails are government records, and must be managed in accordance with government policies and standards.

As a record of what has occurred at a certain point in time, email messages that are stored in TRIM cannot be modified. Attachments may be copied, modified and saved (catalogued) under a different name.

3.2.1 Tips for managing email in TRIM effectively

- Create single topic messages to make filing and retrieval easier.
- Use a short, descriptive subject line.
- Format messages for easy reading.
- Use TRIM references rather than attachments within your office.
- Use keywords at the start of the subject line to clarify the purpose of your email.

3.2.2 What Email should be saved in TRIM?

Email messages and attachments should be filed into TRIM if they document the business activities of your office. Refer to ARCS or the ORCS that covers your program area records to determine if an email message is a record. When in doubt, consult with your ministry records team.

3.2.3 Who is responsible for filing email in TRIM, and when?

Initiator

- The initiator of an email files a copy of the sent message in TRIM.
- File the message promptly after it has been sent -- unless the email is likely to include a series of exchanges (see section 4.3.2).
- File outgoing messages only after they have been sent. Do not save a draft message to TRIM.
Recipient

As the recipient of a business-related email message, consider if it is being filed in TRIM by someone else and if you will have access to it. If neither is the case, you should file it.

- File it promptly after receiving it -- unless the email is likely to include a series of exchanges.
- In cases where a group of people will be receiving email messages on a particular matter or project, work with the others to identify one person to file all messages relating to that matter or project.

3.2.4 Email containing a series of replies

When messages become part of a series of replies, save the last message in the series that includes all previous replies, rather than separately saving each message.

3.2.5 Email Decision Diagram

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Step 2</th>
<th>Step 3</th>
<th>Official Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Has value for business unit?</td>
<td>Final email thread?</td>
<td>Main or only ministry recipient?</td>
<td>File in TRIM</td>
</tr>
<tr>
<td>b) Provides evidence of official business, policies, actions, transactions, or decisions?</td>
<td>Has attachment?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c) Required for legal, fiscal, audit, administrative, or operational purposes?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-business/ Not required under b) &amp; c)</td>
<td>Preparation of ongoing record</td>
<td>Copies</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Transitory Email</td>
<td>DO NOT file in TRIM</td>
<td></td>
</tr>
</tbody>
</table>

Note: When email replies deviate from the original subject, separate and capture them in a new email with a different title in TRIM that clearly reflects the content of the new message.
3.3 Saving Email into TRIM

Saving email into TRIM is referred to as “cataloguing”.

- Always catalogue the attachment with the email message so that there is a date and time stamp of exactly what was sent.
- If you know that people will likely search for the attachment or need to edit it, then also catalogue it separately.
- If you need to find an attachment within an email then search by TRIM email message contents.

3.3.1 Saving a Received or Sent Message

The following method will catalogue the email message and any attachments together as one record in TRIM.

A. In Outlook, open the message you wish to catalogue OR click on the email message in your Outlook message list.

B. Click on the Catalogue icon on the toolbar. The New Record dialogue box will display.

Note: An email contents message search may be slow.
C. Edit the Title if required. *Ensure the title is meaningful to enable you and others to find the email more easily later.*

D. Select the **Folder** for the email by clicking on the KwikSelect icon beside the Folder field and then the Find Records icon in the TRIM toolbar. **Suggestion:** Search by Title Word to find the Folder.

E. (Optional) If you want to add Notes:
   i) Click on the Display and/or Modify Notes tab
   ii) Click on the **User Stamp** button
   iii) Type your note and click **OK**.

**Note:** Changing the Free Text title of the record does not alter the original subject line on the email message.

**Tip:** If you have used containers before, they will be listed (to a maximum of 25) in your Shortcuts Recent Containers list.
F. Click OK.

G. The email message(s), including any attachments, are now registered in TRIM.

   In Outlook, the catalogued message has the word TRIM added to the beginning of the subject line. The email will remain in your Outlook folder until you delete it or it will be moved to your Deleted Items automatically if you have selected the Delete Messages when Catalogued in TRIM option.

Note: Spell check is automatically enabled. Click the Options button to change the settings to your choice.
3.3.2 Saving Attachments Separately

If you think that other people are likely to search for the attached document, then catalogue the attachment separately using Catalogue Attachment(s) Only, after you have catalogued the email and attachment together.

A. In Outlook, click on the email message with the attachment you wish to catalogue.

B. Click on the Catalogue Attachment(s) Only icon on the toolbar. (icon has green arrow and paperclip).

C. Edit the Title if required. *(remove the file extension)* and select the Folder the attachment is to be filed in.

D. Additional Notes are recommended for attachments cataloged separately.
   i) Click on the Display and/or Modify Notes tab
   ii) Click on the User Stamp button
   iii) Type your note and click OK.

E. Click OK. You will have to go through steps B through E again for each additional attachment. The attachment(s) are now registered/catalogued in TRIM.
3.4 Sending an Email Message with a TRIM Reference

The purpose of this function is to allow the creation of a pointer or shortcut to a document in TRIM instead of sending a copy of a document as an attachment. Emailing a TRIM reference to someone is a far more effective and network “resource-friendly” method of emailing documents. However, this will only work if the recipient is a TRIM user with access to that specific record (i.e., the record is not in a restricted folder).

The attached TRIM reference will appear as a TRIM icon with the record title. The "tr5" extension stands for TRIM Reference.

A. Start a new mail message in Outlook.

B. Type in the mail message as usual, and then click on the HP TRIM toolbar tab and the Attach Records icon. The Search for Records dialogue box will appear.

Note: You cannot make a reference to a document in your Offline Records, as it is accessible only to you.

Note: References can be made to documents or folders.

Note: To send an email as an attachment to a new email message, find the email in TRIM and either open and Forward it or send it as an email attachment from within TRIM (see Section 8). If you use the Attach Records function in Outlook to insert a TRIM email, the email will be attached as an HTML document, without links to any attachments and the attachments will be attached as separate documents.
C. Search for the records you wish to attach to the email.

D. Select a record by clicking to the left of the record until a checkmark appears (i.e., tag the record). Do this for each record you require.

![Image showing record selection]

E. Click OK when you have selected all the records you need.

F. Click in the check box to check or uncheck options as required in the Attach HP TRIM Records dialogue box.

**If sending to TRIM users** then check Attach HP TRIM Record Reference; a reference to the document in TRIM will be sent. When the recipient double clicks on the attachment they can open it to view a Read-Only copy or they can Check it Out of TRIM (if it is not already checked out).

**If sending to non-TRIM users**, then check Electronic document. The document will be attached.

You may check both if you are sending the information to both TRIM users and non-TRIM users.
G. Click on the **OK** button.

H. Click the **Send** button to send the message with the references/attachments.

---

**Note**: It is recommended to uncheck **Add Record Details to Message Body**.

**Suggestion**: If sending a TRIM reference and an electronic document attachment, you may want to indicate in your message that recipients who do not have TRIM will not be able to open the TRIM attachment (.tr5).
4. Automating Cataloguing Email in TRIM

You can set up links between Outlook folders and TRIM folders. Linked folders can be used for a one time load of all email in a particular folder into TRIM, or for ongoing automatic cataloguing into TRIM.

Prior to setting up a linked folder in Outlook it is important to review the contents of the folder and ensure that they are consistent (i.e., all on the same topic). You must also ensure that there is an appropriate folder in TRIM to which you can link. If not, ask your Information Worker for help with this. The Information Worker may need to create the TRIM electronic folder first.

4.1 Setting up a Linked Folder in Outlook

When you set up a linked folder in Outlook the email messages that are already sitting in the folder do not get automatically processed. You must manually process those messages by clearing the backlog.

Once a linked folder has been set up, any new email messages that are moved into that folder will be processed automatically and immediately filed into the TRIM database.

You can create as many linked folders as you need

A. In Outlook, select the folder you wish to link to a TRIM folder.
B. On the TRIM Toolbar click on the HP TRIM drop down menu in the toolbar, then select Current Folder: (name of your folder) | Create Link.

DO NOT LINK TO YOUR INBOX!
C. Select a Record type, if a default is not set up, and then select the Container (Folder) you wish to link to (i.e., catalogue the email into) in TRIM.

D. Use the KwikSelect icon beside Container (Folder) to search for and select the appropriate TRIM folder. The folder number will be inserted in the Container box.

If you wish to be prompted for each message as it is catalogued, check the “Display data entry form when cataloguing message” check box.

**Advantage:** Choosing to be prompted for each message as it is catalogued gives you the ability to change the message title prior to it being catalogued. The default title is the email message subject. Many email message subjects are not meaningful, thereby affecting the ability to find the message afterwards.

E. Once the Record Type and Folder have been selected, click **OK** to create the link.

Once the link has been created, a number of commands become available through the TRIM icon via the Linked Folder fly-out menu.
Open Container – allows you to look at the TRIM folder and view its properties or contents.

Clear Backlog – allows you to process the email messages that were already in the Outlook folder when you set up the link.

Remove Link – Removes the link.

Properties – Allows you to view and edit the Properties of the link.

4.2 Clearing the Backlog

When you set up a linked folder in Outlook the email messages that are already sitting in the folder do not get automatically processed into TRIM. You must manually process those messages by clearing the backlog.

Once a linked folder has been set up, any new email messages that are moved into that folder will be processed automatically and immediately filed into the TRIM database.

To clear the backlog:
A. In Microsoft Outlook, select the linked folder.

B. Click on the HP TRIM toolbar drop down menu, then select Linked Folder: <name of Outlook linked folder>|> Clear Backlog.

Note: there is also the ability to clear the backlogs of all linked folders directly under the TRIM menu in Outlook by clicking on the Clear Backlogs option from the TRIM dropdown. This is not recommended. Use the Clear Backlog from the fly-out instead.
C. If you checked the **Display data entry form when cataloguing message** check box when you set up the link, then you will be prompted to confirm each email as it is processed. At this time you may also change the free text title of the email or add Notes.

Click **OK** to confirm each message.

D. Once the messages are processed, the word TRIM will be added to the beginning of the Subject line in Outlook to let you know that it has been catalogued in TRIM.

If you chose the option to delete messages after cataloguing, the message will be moved to your Deleted folder in Outlook.

If you did not choose the ‘delete’ option, then it is recommended that you delete messages with TRIM in the Outlook subject line from Outlook.

**Note:** Do not delete an Outlook folder prior to removing the TRIM link.
4.3 Removing a Link

You may not wish to keep a link active on a particular email folder. For example, you may want to create a folder in Outlook, move messages into the Outlook folder, set up the TRIM link, clear the backlog and then remove the link. This method allows you to bulk catalogue email.

**To Remove a Link:**

A. In Outlook, select the linked folder.

B. On the TRIM Toolbar click on the TRIM icon, then select **Linked Folder:** (name of linked folder >) **Remove Link.**

*Note: TRIM will not ‘remember’ which TRIM folder the Outlook folder was linked to, so if you want to re-link the folders you will have to create the link again.*
5. Working with Documents

5.1 Objectives

In this chapter you will learn:

1. How to save draft documents into the Offline Records Tray in TRIM Desktop
2. How to check documents in and out of TRIM
3. How to edit a document directly in TRIM
4. How to finalize a document
5. How to Super Copy a document to create a new version
6. How to delete documents from the Offline Records Tray
7. How to move a document to a different folder

5.2 What is Offline Records?

Offline Records is used for managing draft documents and documents that have been checked out of the TRIM database. This is your private working space. The documents in Offline Records can be stored and edited without changes being saved into TRIM until you check them in.

Offline Records are stored on your private drive on the LAN. No other users can see the draft documents you have in your Offline Records Tray.

5.3 TRIM Document Process Overview

All documents go into folders in TRIM (like they do on the LAN). Electronic documents that are saved in TRIM have several stages they may go through.

**Stage 1: Draft**
When a document is first created and saved into Offline Records it has a Status of Draft.

**Stage 2: Save in TRIM**
The draft document is checked in to TRIM database for others to view or edit.

**Stage 3: Edit**
A document can be edited directly from the search screen or can be checked out to Offline Records. A checked out document has a status of Original. Once the checked out document is modified, it will have a status of Modified. A modified document must be checked back into TRIM for others to see the changes.
Stage 4: Finalize (no more changes can be made)
A document that has been checked into TRIM can be made Final, after which no other changes can be made to the document.

5.4 Getting to Offline Records
To get to Offline Records, click Start | All Programs | TRIM Context > TRIM Desktop and click on the Offline Records icon on the TRIM Desktop toolbar or in the Trays shortcut menu bar.

Note: Original and Modified records are stored in Offline Records under the name of the TRIM folder from which they were checked out. The folder itself is not checked out.

Draft - A Draft document is an electronic document that has been saved into Offline Records but has not been checked into TRIM.
Original - An Original document indicates the document has been checked into TRIM and has been Checked Out of TRIM. No modifications have been saved to the document while it was in Offline Records.

Modified - A Modified document indicates the document was checked into TRIM, then Checked Out of TRIM, modified and the changes to the document were saved. The modified document has not yet been checked back into TRIM.

5.5 Saving a Draft Document into Offline Records

New draft documents may be stored in Offline Records and then checked into TRIM when ready. You may also want to move a document that you already have on the LAN (e.g., H:\) into Offline Records to work on.

5.5.1 Saving a Draft Word, Excel or PowerPoint Document into Offline Records

The following information describes using Offline Records from within MS Word, PowerPoint, or Excel.

A. Create a document in Microsoft Word, PowerPoint or Excel.
B. Select File | Save As from the File menu and the Offline Records Box will be displayed

C. Document Name - Enter the title you wish to give your document.
Document Naming Conventions:

- Ensure you do not include personal or confidential information.
- If using a hyphen include a space before and after the hyphen to enable better searching.
- Try to avoid using other punctuation in the name, if possible.
- Avoid diacriticals (backslashes, other similar characters).

D. Click **OK** to save the document into Offline Records.

Once a document is saved in Offline Records, all subsequent changes to the document will be saved to Offline Records if you use the Save function. The Save As function allows you to save the document as a new Draft document in Offline Records. This means it will be given a new file name and will be treated as a separate document and eventually as a new record when it is checked into TRIM.

**Other Offline Records Options when Saving a Document**

**Local**

Click the **Local button** to bypass Offline Records and save the document to a LAN directory location of your choice or on your desktop.

![Offline Records (CRMB Test) - Save Document As](image)

**Online**

If you wish to save a document directly to a TRIM folder without it residing in Offline Records first, click the Online button and the TRIM New Record dialogue box will open.
5.5.2 Saving a Draft AutoCAD or Adobe Document into Offline Records

Some applications such as AutoCAD, Adobe and WinZip do not automatically integrate with TRIM like Word and PowerPoint. In order to use Offline Records with these applications you must manually save the document into Offline Records (same as saving a document to a LAN folder).

To save documents manually into Offline Records:

A. Create the document in the appropriate application.
B. Select File | Save or File | Save As.
C. In the Windows Save Folder List, select your Offline Records on the LAN:

   Note: You may have access to more than one Offline Records. For example, you may have one for Training and one for Production. Make sure you pick the correct one.

   Production Offline Records ➔ H:\Offline Records (GN)
   
   Training Offline Records ➔ H:\Offline Records (01)

D. Type in the file name and click Save.
E. The document will appear in your Offline Records.

5.5.3 Saving an Existing Document on the LAN into Offline Records

To move a document that is currently residing on a LAN drive into Offline Records,

A. Open the document in its application.
B. Select File | Save As (the Offline Records box will display).
   NOTE: for Excel, see sidebar Tip

C. Enter a Document Name, and then click OK to save the document in Offline Records.

Note: Delete the original document on the LAN to avoid having two copies of the same document.
5.6 Checking In a Draft Document

After a draft document is saved into TRIM, depending on security and access settings, some staff will be able to view the document and other staff (usually restricted to your branch) will be able to edit the document until it is finalized.

A. Open TRIM Desktop.

B. Click on the Offline Records icon.

C. Click on the draft document you wish to check in.

D. Right click on the document and then select Check In from the menu. The New Record entry form will display

![Offline Records - All]

E. If you have not chosen a Record Type, you will be prompted for one.

F. Enter the Free Text Title. This should be the final title of the document. To change the title after the document is checked in, contact your Information Worker.

G. Select the Folder the document is to be saved in by clicking on the KwikSelect icon and conducting a search. Once the folder is chosen the form will look similar to the following:
H. If additional Notes are required, then click on the Notes tab, click on the User Stamp button, then type your note and click OK.

I. Click OK.

Spell check is automatically enabled. Click the Options button to change the settings to your choice.

The document will now be saved in TRIM and removed from Offline Records.
5.7 Modifying a Document Already Checked In to TRIM

There are several ways you can edit a document that is checked into TRIM; by opening it directly from the search result screen or by checking out to and editing it in Offline Records.

5.7.1 Editing a Document Directly from a Search Results Screen

If your edits do not require you to hold on to the document for more than a couple of hours, edit it directly from the TRIM Desktop search result screen.

Conduct a search for the record. Double-click on it to open it. You can also right-click on it and click on **Edit** from the fly-out menu. The document will open; providing you have update access to it.

If you do not have update access to the document you will not see **Edit** in the right-click fly-out menu and if you double-click on the document you will receive this message:

![Message](image)

If you have update access, the document will open in its native application where you can make your changes. When you are finished, save and close the document.

When you open the document in this way, TRIM automatically checks the document out to you and no other user can update the document until you close it. When you close the document, TRIM automatically checks it in from your Offline Records.
5.7.2 Checking out a Document to Offline Records

If your edits require you to hold onto the document for more than a couple of hours, you may want to keep it in Offline Records for that period of time.

A. Search for the record you want to check out.

B. Right-click on the record in the search result screen and select **Check Out** from the drop down menu.

**Note:** You cannot check out a document to Offline Records if:
- It is not an electronic document.
- It is an email message.
- The document is Checked Out to another user.
- The document is marked as Final.
C. Extract the document to your Offline Records or to your personal drive (e.g., H drive).

D. You can also check out a document by right-clicking on the document in the search results and selecting **Electronic | Advanced Check Out** from the drop down menu.
E. Click the radio buttons for **Offline Records** and **Check Out Document**, to edit the latest Revision. Click OK.

If you do not have update access to the document the **Check Out Document, to edit the latest Revision** radio button will be greyed out and the following message will appear beneath it:

![Check Out Document, to edit the latest Revision](image)

**Note:** For information about the other Advance Check Out Options, contact your Information Worker.

**Note:** when you check out a document to Offline Records, TRIM also creates the document’s folder in Offline Records and places the document within it.
5.7.3 Modify a Document after Check Out to Offline Records

Once you have checked out a document from TRIM into Offline Records, you can make changes to it and keep it checked out for further editing or check it back into TRIM.

A. From TRIM Desktop, click on the **Offline Records** icon.

B. Click on the plus sign (+) beside the folder containing the document you want to update.

C. Double-click on the document you want to update.

D. Make the required changes to the document.

E. Save the document and close out of the application.

F. Within a few seconds you should see the document in Offline Records with a **Status** of **Modified**. If the status doesn’t change, click F5 to refresh the view.

G. You can now check this document back into TRIM or leave it in Offline Records for further editing.
5.7.4 Checking In a Modified TRIM Document

A. The **Check In** dialogue box will display.

B. From Offline Records, select the **Modified** document you wish to Check In. **Right click** and choose **Check In**.

C. Select **Replace Current Revision** to save your changes or **Discard Any Modifications Made**. **Discard Any Modifications Made** will be the default choice if you have made no changes to the document.

**Note:** After checking in a document from Offline Records, the folder TRIM created for you remains in Offline Records. You can remove empty folders from Offline records by right-clicking on a folder and selecting **Delete** from the fly-out menu. You can remove all empty folders by selecting **Remove Empty Folders** from the fly-out menu and checking either **Confirm the removal of each container** or **Remove folder automatically once they become empty** and **OK**.
D. (Optional) Add any comments you wish to make in the **Comments** field. Information entered here will appear in the Notes field of the document.

E. (Optional) Check **Keep document(s) checked out after check in complete** to keep the document checked out to your Offline Records if you want to continue to make edits. **Nobody else can edit your document in TRIM since you have a copy checked out to your Offline Records. They can view it, but not make changes.**

F. Click **OK** to check the revised document into TRIM.

**5.8 Finalize a Document**

TRIM allows you to set an electronic document as Final.

Once a document is finalized, **no more changes** can be made to the document (i.e., you will not be able to check out the document for modification). You may however, make a Super Copy of the document to use as the starting point for a new document.

A. Search for the electronic document you wish to finalize.

B. Right-click on the record and select **Electronic | Final**.
C. If you have tagged more than one document to finalize, click **OK** to the *All Tagged Rows* prompt.

![Make Final dialog box]

D. The Finalize Record dialogue box will display:

![Make Final - D9510A dialog box]

E. Click on the **Final** radio button and click **OK**.

5.9 Making a New Version (Super Copy)

You can use a document in TRIM as a starting point for a new document. There are two ways to create a super copy in TRIM.

5.9.1. Copy and Extract to Offline Records or LAN

A. Search for the document in TRIM Desktop.
B. Right click on the document and select **Supercopy**.
C. Click the radio button to save the new document to your Offline Records or to your LAN.
5.9.2 Advanced Check out: Supercopy

Create a supercopy from the Advanced Check Out function:

A. Search for the document in TRIM Desktop.

B. Right-click on the document and select **Electronic | Advanced Check Out** from the fly-out menu.

C. In the **Advanced Check Out Attached Electronic Document** dialogue box, indicate where you want the extracted document to be placed by clicking on the **Offline Record**, **Local File**, or **Windows Folder Queue** radio button.

D. Click on the **Super Copy** radio button and click **OK**. A copy of the document will be placed in your Offline Records with the status of Draft.

**Note:** The title of the supercopy document will be the same as the original. To ensure there is no duplication of title metadata in TRIM, take the time to change the title in Offline Records, by right-clicking on the document, selecting **Properties** and changing the name.
5.10 Opening Documents from Word, Excel or PowerPoint

Offline Records can be accessed from within Word, Excel (if TRIM Add-in is active) or PowerPoint.

A. Launch Word, Excel or PowerPoint, click on the Office button and select Open.

B. Offline Records will appear. Select the document you wish to open and click OK or double click on the document to open it.
5.11 Deleting Documents or Email

5.11.1 Removing Documents or Document Edits from Offline Records

You may want to remove draft documents or to discard changes to original or modified documents from your Offline Records from time to time. For example, you may not want to keep a draft document. Or, you may check out a document for editing and then realize that you do not want to make any changes or that you do not want to save the changes you have made.

A. Highlight the document in Offline Records.

B. Right-click on the document and then select Delete from the fly-out menu.

C. Click Yes to prompt. Draft documents will be deleted from Offline Records. Original and modified documents will be removed from Offline Records and checked back into TRIM.
5.11.2 Deleting Documents or Email from TRIM

Users do not have the ability to delete catalogued documents or email messages from TRIM. To request the deletion of a document or email from TRIM, send an email message with a TRIM reference to EDRMS Help.

A. Search for the record you want deleted.

B. Right-click on the record and select **Send To | Mail Recipient** from the fly-out menu.

C. Check the **TRIM Record Reference** box and **OK**.

D. Put the reason for the deletion (e.g., duplicate, created in error) in the body of the email message and send the message to **EDRMS Help**.
5.11.3 Moving a Document to a Different Folder

Documents placed in the wrong folder can be moved to another folder.

A. Search for the document.
B. Right-click on the document, and then select Locations | Container (Folder/Box).

*Note: If you need assistance with moving a document between folders, contact EDRMS Help.*
C. By default the ‘Set Container (Folder/Box) To’ field will display the folder that the document is in currently. Clear the field and click the KwikSelect icon to search for and select the correct folder.

D. Click OK to confirm once the correct folder has been selected.
6. More About Searching

6.1 Objectives
In this chapter you will learn how to:

1. Save searches
2. Use Saved Searches
3. Add/remove Saved Searches to/from Favourites
4. Add folders to Favourites

6.2 TRIM Indexing Rules
TRIM applies indexing rules (i.e., how it stores text and numbers) to punctuation and special characters found in text fields (e.g., titles, notes). Below are general guidelines for searching in TRIM.

<table>
<thead>
<tr>
<th>Numbers and Dates</th>
<th>For numbers and dates joined by slashed, dashes or periods, include the joining characters when searching or replace with the * wildcard</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>To find this:</strong></td>
<td><strong>Search for this:</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Split Words</th>
<th>Search as separate words. Do not replace separator with a * wildcard</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>To find this:</strong></td>
<td><strong>Search for this:</strong></td>
</tr>
<tr>
<td>data/records</td>
<td>Data/records</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Words in quotes or brackets</th>
<th>Omit brackets and quotes when searching</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>To find this:</strong></td>
<td><strong>Search for this:</strong></td>
</tr>
<tr>
<td>“mandatory”</td>
<td>mandatory</td>
</tr>
<tr>
<td>(draft)</td>
<td>draft</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Abbreviations and Initials</th>
<th>Omit periods when searching</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>To find this:</strong></td>
<td><strong>Search for this:</strong></td>
</tr>
<tr>
<td>W.C. Handy</td>
<td>WC Handy</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Words containing ending punctuation</th>
<th>Omit the ending punctuation when searching</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>To find this:</strong></td>
<td><strong>Search for this:</strong></td>
</tr>
<tr>
<td>Drive BC!</td>
<td>Drive BC</td>
</tr>
<tr>
<td>Etc.</td>
<td>Etc</td>
</tr>
</tbody>
</table>
### Compound words containing dashes or special characters

<table>
<thead>
<tr>
<th>To find this:</th>
<th>Search for this:</th>
<th>Do not search for this:</th>
</tr>
</thead>
<tbody>
<tr>
<td>E&amp;P</td>
<td>E&amp;P</td>
<td>E &amp; P</td>
</tr>
<tr>
<td>summary – draft</td>
<td>summary draft</td>
<td>summary-draft</td>
</tr>
</tbody>
</table>

### 6.3 Changing Columns Displayed in the List Pane

There are two ways to accomplish this task. One is directly on a search screen and the other is through the Tools menu.

#### 6.3.1 Formatting Columns via the Search Screen

A. Execute a search.

B. Right-click on a column heading in the List pane, then select Format Columns.
D. The Column Preferences window is displayed

E. To remove a column from the List Pane click on a field in the **Displayed Columns** list, and then click on the **Remove** button.

F. To add a column to the List Pane
   i. Click on the field in the **Available Columns** list.
   ii. Click on the **Add** button.
   iii. Click on the **Up** or **Down** button to change display position in the list.
   iv. Repeat steps a) through e) until all required columns are added.
   v. Click **OK** when all columns are added or removed as desired.

Many columns preferences can be displayed in text, icon, or text & icon. To change the display format, right-click on the specific column heading and choose **Display** and your display preference from the fly-out menu.
You can change the width of any column by positioning your mouse on the right edge of the column heading (it will change to two-sided arrow), and clicking and dragging to change the column width. You can also use the right-click fly-out menu items of **Best Fit** and **Best Fit All Columns** to modify your column widths.

### 6.3.2 Formatting Columns via the Tools Menu

A. From TRIM Desktop select **View | Format List Columns** from the menu bar.
B. The Column Preferences window is displayed.

Follow the steps in 7.3.1.D to change columns.

### 6.3.3 Recommended Columns for the List Pane

You can customize your display to whichever columns you find most useful. The recommended fields to start with are shown below. Information Workers will want to display the **Record Number** and may also want to add **Retrieval Code**.

<table>
<thead>
<tr>
<th>Active Column</th>
<th>Display</th>
<th>Column Width</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record Number</td>
<td>Both</td>
<td>Best Fit</td>
</tr>
<tr>
<td>Title (Free Text Part)</td>
<td>Text</td>
<td>Best Fit</td>
</tr>
<tr>
<td>Date Created (Opened)</td>
<td>Text</td>
<td>Best Fit</td>
</tr>
<tr>
<td>Date Closed</td>
<td>Text</td>
<td>Best Fit</td>
</tr>
</tbody>
</table>

*Tip: End users may choose to use only the Icon display for the Record Number.*
6.4 Changing Fields Displayed in the View Pane

A. Execute a search.
B. Click on an e-folder.
C. Right-click in the View pane (bottom pane) and then select Customise.

**Note:** In TRIM you must customize the view pane for each different Record Type, (e.g. box, e-folder, p-folder and document). 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 on which you make the changes.
D. The Record View Pane is displayed.

![Record View Pane - LCS CO CORPORATE RECORDS MANAGEMENT DOCUMENT](image)

E. To remove a field from the display.
   
i. Click on the field in the **Displayed Fields** list, and then click on the **Remove** button.

F. To add a column to the display.
   
i. Click on the field in the **Available Fields** list and then click on the **Add** button. Click on the added field, and then click on the **Up** or **Down** button to change display position in the list.

G. Click on **OK** when all fields are added or removed as desired.

Repeat steps above for a p-folder and for a document. For the latter, you can click on an icon for any type of electronic document.
6.4.1 Recommended Fields for the View Pane

You can customize your display to whichever fields you find most useful. See below for the recommended fields.

**Electronic Folder (yellow folder icon)**
- Record Number
- Title
- Owner
- Home
- Alternatively Contains
- Notes

**Physical Folder (blue folder icon)**
- Record Number
- Title
- Owner
- Home
- Container (Folder/Box)
- Assignee
- Alternative Container
- Hardcopy Media Type
- Notes

**Note:** Adding the *Alternative Container* property to the view pane allows you to double click on it to display the folder contents in the list pane.
### 6.5 Saving Searches

TRIM allows you 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.

To save a search:

A. Perform the search you wish to save.

B. Right click in the results window then select **Search** | **Save Search As**.

**Note:** Adding the **Folder** property to the view pane allows you to double click on it to display its contents in the list pane.

**Be careful** if you have more than two criteria and a mixture of AND and OR, double check that the brackets are around the operations you want to group together. TRIM will automatically put brackets in for you if you do not specify any.
C. Enter the following details:

i. **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. This is a maximum of 30 characters. Each Saved Search name must be unique.

ii. **Description**: The description field enables you to enter a more detailed description of the search. By default TRIM inserts the search method(s) and value(s).

iii. Click on the **Search** tab and, if required, edit the search criteria.

iv. Click on the **Sort** tab and sort the search, as required.

v. Click on the **Filter** tab and select relevant filters.

vi. Click **OK**.

**Note**: Saved searches created by you are accessible only by you. An Information Manager or Administrator can create a saved search that can be used by everyone or selected groups of people.

**Naming Convention**: Put your ministry code (CS, TR, etc.) and your initials at beginning of the search name.
6.5.1 Accessing a Saved Search

A. Select **Search | Saved Record Searches.**

![Screenshot of TRIM interface showing the Saved Searches option]

**Note:** the diagram to the left shows previous version of TRIM; “Saved Searches” has become “Saved Record Searches” in TRIM 7.2.1

B. A list of all available Saved Searches will display.

![Image of Saved Searches list]

C. Double click on the desired search and the results will be displayed.
6.6 Adding a Saved Search to Favourites

A. From the Menu, select Search | Saved Searches.
B. Right-click on a search then select Send To > Favourites.

6.6.1 Accessing Favourite Saved Searches

A. Select Search | Favourite | Saved Searches from the TRIM menu bar
OR

Click on the **Favourites** shortcut bar and click the **Saved Searches** icon.

B. Double click on a search in the list to execute the search.
6.7 Removing Saved Searches

The Saved Searches - All list displays searches you have created for personal use and searches that are available for you to use. Your Favourite Saved Searches list is a subset of Saved Searches - All.

6.7.1 Removing a Search from Your Favourite Saved Searches

A. Click on the Favourites shortcut bar | Saved Searches in the shortcut bar.
B. Right click on the search you want to remove and select Remove from Favourites.

Note: This command removes the Saved Search from your Favourite list, but it still exists in the Saved Searches - All list.

6.7.2 Removing a Search from the Saved Searches - Top list

A. Select Search | Saved Searches from the TRIM menu bar.
B. Right-click on the search you want to remove and select Delete. This will remove from Saved Searches - All and, if placed there, from your Favourites | Saved Searches.

Note: You can delete only the searches you created.
6.8 Meta-Variables

When searching dates, such as **Date Registered**, you have a choice of using a fixed date or a meta-variable. For example, if you want to do a daily search for records registered that day, rather than using a fixed date (2004-12-31) use the meta-variable **Today**. This always get you the current day’s records. The date meta-variables are found in the drop down list in the calendar when selecting a date.
Some of the meta-variables available for dates are:

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

You can use the meta-variable **Me** when searching locations (e.g. Creator = Me). To do so, type ‘me’ into the Location box.

You can also use the meta-variable **My Unit** my when searching locations (e.g., Home = my unit).
7. Sending TRIM Emails as Email Attachments

If you use the TRIM Attach Records function in Outlook to attach emails that are already catalogued in TRIM, the emails attached get turned into HTML documents and the attachments within those emails are stripped from the emails and are attached as separate documents.

However, by following the steps below you can send emails from TRIM - in their original format (e.g., Outlook msg.) with any internal attachments intact.

These steps are really only necessary when you want to send copies of multiple TRIM emails as email attachments to someone who cannot view the email in TRIM.

E. Find the email records in TRIM that you want to send.
   (Note: you must be able to find all of the desired email messages with the same search so that you can tag them – you only get one chance to tag/select the records)

F. Tag each record that you want to attach by clicking to the left of it until a check mark appears.

Note: If you are simply sending one email message that is catalogued in TRIM, you could find that message, open it, and Forward it or Reply to it, rather than attaching a copy of it in an email.

If your message recipient is a TRIM user and has access to the email messages you want to send, you could send the recipient a TRIM record reference to the email.
C. Right-click on one of the tagged records, then select **Send To | Mail Recipient.**

D. Click **OK** to the **All Tagged Rows** prompt.
E. Ensure the **Electronic Renditions** check box is checked and click **OK**.

F. Click on **Yes to All** to confirm all records.

G. A new mail message window will open.
   i. Address the message.
   ii. Edit the subject line.
   iii. If desired, delete any TRIM record information text in the message area.
   iv. Type your message.
v. Send the message.
8. Shortcuts

8.1 Objectives

In this chapter you will learn:

How to turn on the Shortcuts bar

How to use your Shortcuts Bar to access your:

- Favourite Records
- Trays
- Recent Documents

TRIM provides shortcuts for accessing your recently used documents and folders as well as documents and folders you set as your favourites. The Shortcuts Bar is displayed down the left side of the TRIM Desktop window.
8.1.1 How to Turn on the Shortcuts Bar

The Shortcuts bar can be turned on and off. If it is turned off accidentally you can turn it back on easily.

A. Select View from the TRIM menu bar and check Shortcuts Pane OR right-click on the top toolbar and select Customize.

B. Click on the Toolbars tab.

C. Ensure the Shortcuts toolbar is checked.

D. Click Close.
8.1.2 Recent Shortcuts

The Recent Shortcut bar contains icons to display the My Containers and Recent Documents icons.

Click on the Recent shortcut bar.

8.1.3 My Containers

Clicking on the My Containers icon will display the last 25 electronic folders or boxes (containers) you have checked draft documents into, or folders or boxes (containers) you have manually added to your My Container list. The My Containers list does not contain any physical folders requested or signed out.

You can also manually add an e-folder to your My Container list by finding it, then right-click on the document and then select Send To | Add to My Containers.
8.1.4 Recent Documents Bar

Clicking on the Recent Documents icon displays the last 25 electronic documents you worked on. The Recent Documents list does not include any physical documents. Recent Documents will also include newly catalogued email messages if that option was selected in the Tools | Options | E-mail setup.

You can also manually add a document to your Recent Documents list by finding it, then right-clicking on the document and then selecting Send To | Add to Recent Documents.

You may also get to your Recent Documents by:

Clicking on the Recent Documents icon on the toolbar

OR

Selecting Search | TRIM Trays | Recent Documents.
8.2 Trays Bar

TRIM includes several Trays where you may store regularly used entries.

- **Record Work Tray** - Lists all records within your **Work Tray**.

- **Records In Tray** - Shows any physical folders or documents that have been signed out to you. When an item is returned to the file room, the Information Worker updates TRIM and the item will no longer display in your In Tray.

- **Records Due Tray** - All records with actions due, assigned to you.

- **Records In or Due Tray** - All records that are assigned to you or have actions due for which you are responsible.

- **Offline Records** - Lists draft documents and documents you have checked out from TRIM.

- **Documents Checked Out** - Lists any documents that you have checked out. TRIM performs a search of records checked out to you.

- **My To Do Items** – Lists any tasks that you have entered as needing to be done, along with the assignee and due date.

- **User Labels (new for TRIM 7.2.1)** Lists records with a specified user label (ask your IW for more information on user defined labels)

*Note: Double-clicking on a document in the Documents Checked Out tray will not allow you to edit it. Always access your checked out documents from the Offline Records tray if you wish to edit them.*
8.3 Favourites Bar

The Favourites bar provides shortcuts to the items you have added to your favourites in the following categories:

- **Records** - Frequently used documents and folders that you have added to your favourites

- **Locations** - Commonly used Locations you have added (used by Information Workers).

- **Classifications** - Commonly used Classification Levels you have added (used by Information Workers).

- **Saved Searches** - Frequently used **Saved Searches** you have added.
8.3.1 Favourite Records

Documents and/or folders that you access frequently can be set up in your own Favourite Records list to make them easier to access when searching or checking in documents.

To access your Favourite Records, click on the Favourites shortcut and click on the Records icon.

8.3.2 Adding to Your Favourite Records

A. Search for the documents and/or folders you want to add to your Favourites.

B. Tag the records in the search results window by clicking to the left of the records until a check mark appears.

C. Right-click on a tagged record, then Send To | Favourites.
8.3.3 Removing a Record Search from Your Favourites

Right click on the record you want to remove then select Remove From | Remove From Favourites.
9. Getting Help

9.1 TRIM Business Help

Information Workers are the first line of support for their staff. If you have a TRIM issue that your Information Worker cannot resolve, send an email to EDRMS Help.