TRIM Folder
Training Guide

TRIM version 7 build 21.3519

Information Access Operations
**Revision History**

<table>
<thead>
<tr>
<th>Date</th>
<th>Version</th>
<th>Changes</th>
<th>Author</th>
</tr>
</thead>
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<tr>
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1. Introduction - A Tour of TRIM

1.1 Guide Overview

The purpose of this course is to provide you with the techniques and skills to use TRIM Desktop to create folders. Information Workers create electronic and physical folders for end-users. These folders apply the ARCS and ORCS classification schemes.

Prerequisites:
- It is assumed that attendees are comfortable working in the Windows environment.
- It is also assumed that participants are familiar with the government ARCS/ORCS classification scheme for filing.

1.2 Objectives

In this chapter you will learn:
1. What TRIM is
2. About TRIM User Roles
3. How to launch the program
4. About user Options

1.3 What is TRIM?

TRIM (which stands for Total Records and Information Management) is an integrated Electronic Document and Records Management System (EDRMS) capable of managing the full range of corporate information. TRIM provides the capability to record and manage the complete life cycle of a ministry’s information.

1.3.1 TRIM Components

The TRIM software is comprised of the following two main components:

HP Context™: This component contains all of the functionality required by the TRIM Administrator and Information Managers. Context is used to do many Records Management functions and maintain TRIM tables such as Locations and Classifications.

TRIM Desktop: This is the component you will be using. It allows you to create, search for and edit records (documents and folders), within the TRIM database. Desktop contains an Offline Records Tray that holds the documents you are currently working on. The Offline Records Tray holds documents that have not yet been checked into TRIM as well as documents that have been checked out for revision.
Note: TRIM has many terms for which the meaning is not immediately clear, as you may have noticed in the first few pages of this training guide. However, as you go through this training manual, these terms will be defined and explained.

### 1.4 User Roles

Each type of user is assigned a specific login role in TRIM. TRIM offers several different types of roles. The roles in use at the ministry are described below.

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>End User</strong></td>
<td>Basic User&lt;br&gt;Everyone has the capabilities available to this role. This role allows you search for and save documents and e-mail messages in the TRIM database.</td>
</tr>
<tr>
<td><strong>Information Worker</strong></td>
<td>Next level above End User&lt;br&gt;Information Workers have the capability to create electronic and physical folders in TRIM into which documents will be filed by end users. Information Workers also take care of folder maintenance (e.g., creating folders, printing reports and labels, box maintenance).</td>
</tr>
<tr>
<td><strong>Information Manager</strong></td>
<td>Second most powerful role within TRIM&lt;br&gt;The Information Manager is responsible for several administrative functions within the TRIM database (e.g., adding and removing users, setting up record types within TRIM, reclassifying folders, correcting data errors).</td>
</tr>
<tr>
<td><strong>TRIM Administrator</strong></td>
<td>Most powerful role in TRIM&lt;br&gt;The TRIM Administrator has advanced system administration capabilities.</td>
</tr>
</tbody>
</table>

TRIM applies certain indexing rules (how it stores text and numbers) to punctuation and special characters found in text fields (e.g., titles, notes). See chapter 2 for some general guidelines for searching.
1.5 General Guidelines for Using TRIM

1.5.1 What goes into TRIM?

All electronic documents and email messages that document the ministry’s business should be stored in TRIM. 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.

1.5.2 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. For a fuller definition of transitory records, refer to the special schedule that covers Transitory Records: [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)

1.6 Summary

In this chapter you learned:

1. What HP Context™ and TRIM Desktop are
2. About TRIM user roles

TRIM applies certain indexing rules (how it stores text and numbers) to punctuation and special characters found in text fields (e.g., titles, notes). See chapter 2 for some general guidelines for searching.
2. Searching in TRIM

2.1 Objectives

In this chapter you will learn how to:

1. Perform different searches and use filters
2. Modify the List and View Pane screens
3. Use the Count function
4. Refine a search
5. Search in TRIM using compound searches (AND/OR)
6. Use meta-variables

2.2 General Search Concepts

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. Once you have selected the Search Method, TRIM will display the appropriate search value options where you enter the corresponding criteria that you want the search to meet.

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

**Drop-Down List:** The Drop-down List ▼️ will display the most recently used Search Methods (up to the last 20).

**Partial matches:** TRIM does not automatically execute a partial match search. In order to do a partial match search you must put an asterisk (wildcard) "*" at the end of the text. The "*" wildcard can also be used between words.

**Phrases:** TRIM does not search for phrases except when searching by document content.

For Example: If you search for **title = blue sky**, TRIM will search for records containing both the word **blue** and the word **sky** in the title.

TRIM applies certain indexing rules (how it stores text and numbers) to punctuation and special characters found in text fields (e.g., titles, notes). Below are some general guidelines for searching.
<table>
<thead>
<tr>
<th><strong>Numbers and Dates</strong></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> 2004/2005 or 2004*2005</td>
</tr>
<tr>
<td>Split Words</td>
<td>Search as separate words. Do not replace separator with a * wildcard</td>
</tr>
<tr>
<td><strong>To find this:</strong></td>
<td><strong>Search for this:</strong> data/records or data*records</td>
</tr>
<tr>
<td>Words in quotes or brackets</td>
<td>Omit brackets and quotes when searching</td>
</tr>
<tr>
<td><strong>To find this:</strong></td>
<td><strong>Search for this:</strong> &quot;mandatory&quot; or &quot;mandatory&quot;</td>
</tr>
<tr>
<td>Abbreviations and Initials</td>
<td>Omit periods when searching</td>
</tr>
<tr>
<td><strong>To find this:</strong></td>
<td><strong>Search for this:</strong> WC Handy or W.C. Handy</td>
</tr>
<tr>
<td>Words containing ending punctuation</td>
<td>Omit the ending punctuation when searching</td>
</tr>
<tr>
<td><strong>To find this:</strong></td>
<td><strong>Search for this:</strong> Drive BC! or Drive BC</td>
</tr>
<tr>
<td>Compound words containing dashes or special characters</td>
<td>Generally, include the special characters when searching or replace with * wildcard. If there is a space surrounding the dash or special character then do not include it in the search.</td>
</tr>
</tbody>
</table>
2.3 Performing a Basic Title Word Search

A. Click the **Find Records button** on the TRIM Desktop toolbar to open the search window.
   OR
   Select **Search | Find Records** from the menu.

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

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

The screenprint below shows the results of a title word search using “student”.

The **List Pane** displays records that meet the search criteria you entered, in a list form.

The **View Pane** displays information specific to the record that is selected in the List Pane.
2.4 Search Results – Folders, Documents and Boxes

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

2.4.1 Electronic Folders

Electronic Folders (e-folders) are represented by a yellow folder icon in the search results window and can contain physical folders (blue folder icon), as well as electronic documents. A physical folder (p-folder) is typically related to a corresponding electronic folder. Conversely, an electronic folder does not always have a physical folder related to it.
The settings have been set in TRIM so that the physical folder shows hierarchically below the electronic folder, along with any contained electronic documents.

The following screenprint shows an e-folder that contains electronic documents and a p-folder that contains physical documents.

<table>
<thead>
<tr>
<th>Record Number</th>
<th>Retrieval Code</th>
<th>Title (Free Text Part)</th>
<th>Date Created (Opened)</th>
<th>Date Closed</th>
</tr>
</thead>
<tbody>
<tr>
<td>D6910A</td>
<td></td>
<td>Learning Project Organizing Committee mandate</td>
<td>2010-07-12 at 11:39 AM</td>
<td></td>
</tr>
<tr>
<td>ARCS-00280-20-42</td>
<td></td>
<td>Learning Project Organizing Committee</td>
<td>2010-07-12 at 11:35 AM</td>
<td></td>
</tr>
<tr>
<td>D6910A</td>
<td></td>
<td>Learning Project Organizing Committee mandate</td>
<td>2010-07-12 at 11:39 AM</td>
<td></td>
</tr>
<tr>
<td>ARCS-00280-20-42</td>
<td></td>
<td>Learning Project Organizing Committee</td>
<td>2010-07-12 at 11:21 AM</td>
<td></td>
</tr>
</tbody>
</table>

A p-folder and its contents are contained in an e-folder when the contents form part of a collection of records that are related (i.e., the records all belong to the same business file).

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

The following screen print shows several different types of electronic documents that were saved into the same electronic folder.
2.4.3 Physical Folders

P-folders are represented by a light blue folder icon in the search results window.

![Image of search results window with P-folders]

Usually, only the p-folder itself will be shown in TRIM – the hardcopy documents in the folder will not be individually described. But in some cases it may be useful to identify individual documents within a physical folder.

2.4.4 Physical Documents

The following screen print shows an example of a physical documents in a physical folder.

![Image of physical documents]

2.4.5 Boxes

There are two kinds of boxes to hold p-folders. The boxes with blue-coloured lids hold p-folders that have been transferred to off-site storage. The boxes with yellowish-red coloured lids contain p-folders that have been destroyed onsite at the ministry.

Electronic documents within e-folders in offsite storage blue boxes are still available to the End User. Electronic documents within e-folders in destroyed yellowish-red boxes are no longer available; only the descriptions of the documents (metadata) remain.
2.5 Search Results - List and ViewPanes

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.

The List and View pane fields are customizable. The List pane only needs to be customized once, whereas, the view pane fields are specific to each record type (e.g., Client Services Branch e-folder, Client Services Branch p-folder, Administrative Services e-folder, Administrative Services p-folder)

The View pane must be customized individually for each record type. Each branch record type may have its own view.

The customized views are specific to your user id and the computer you are using.

Note:
Record types are explained in Chapter 4
Creating Folders
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 triangle will appear in the Column to indicate the sort order.

Sorted Ascending Order

Sorted Descending Order

Column Widths

You can change the width of any column by positioning your mouse on the right edge of the column heading (it will change to a four headed arrow), and clicking and dragging to change the column width.

2.6 To Change Columns Displayed in the List Pane

A. Execute a search.

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

![Column Preferences Window](image)

D. **To Remove a Displayed Column**
   i. Click on the field in the **Displayed Columns** list.
   ii. Click on **Remove** button

**To Add a Displayed Column**
   i. Click on the field in the **Available Columns** list.
   ii. Click on the **Add** button.
   iii. Click on the **Up** button or **Down** button to change display position in the list.
   iv. Repeat steps i) through v) until all required columns are added.

E. Click on **OK** when all columns are added or removed as desired.

F. Many column preferences can be displayed in text, icon, or text and icon. To change the display format, right-click on the specific column heading and choose **Display and display preference** from the fly-out menu.

![Records - "OLYMPIC" in Title - Sorted](image)

**Note:**
You can also format columns via the **Tools** menu by selecting **View** | **Format List Columns** from the menu bar.
2.6.1 The Recommended Basic Fields for the List Pane

You can customize your display to include whichever columns you find most useful. Following are the recommended fields to start with. Information Workers will want to display the Record Number as both text and icon 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>Retrieval Code</td>
<td>Text</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>

2.7 Customizing the Fields Shown in the View Pane

A. Execute a search.

B. Click on the record in the list pane (top) that you want to customize the view for.

C. Right-click in the View pane (bottom pane) and then select Customize.
D. The Record View Pane window is displayed.

![Record View Pane](image)

E. **To Remove a Displayed Field**
   i. Click on the field in the **Displayed Fields** list.
   ii. Click on the **Remove** button.

**To Add a Displayed Field**
   i. Click on the field in the **Available Fields** list.
   ii. Click on the **Add** button.
   iii. Click on the added field.
   iv. Click on the **Up** or **Down** button to change display position in the list.

F. Click on **OK** when all fields are added or removed as desired. Repeat steps above for a p-folder and an electronic document. For the latter, you can click on an icon for any type of electronic document.

2.7.1 The Recommended Basic Fields for the View Pane

You can customize the view pane to display whichever fields you find most useful. Following are the recommended fields to start with:

**Record Type = E-Folder (yellow folder icon)***

- Record Number
- Title
- Owner Location
- Home Location
- Alternatively Contains
- Notes
Record Type = P-Folder (blue folder icon)

<table>
<thead>
<tr>
<th>Record Number</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Owner Location</th>
<th>Home Location</th>
<th>Container (Folder/Box)</th>
<th>Assignee</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Alternatively Contains</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Testing difference between having “convert all” on and off.</td>
</tr>
</tbody>
</table>

Note:
Alternative Container allows you to double click on the folder icon to display its contents.

Folder allows you to double click on the folder icon to display its contents.
Record Type = Document (document icon)

<table>
<thead>
<tr>
<th>Record Number</th>
<th>Title</th>
<th>Folder (field name in list is Container (Folder/Box))</th>
<th>Owner Location</th>
<th>Checked Out to</th>
<th>Assignee</th>
<th>Creator</th>
<th>Author</th>
<th>Addressee</th>
<th>Notes</th>
</tr>
</thead>
</table>

2.8 Other Search Methods

To view the different search methods available:

A. Click the **Find Records button** on the toolbar.
   OR
   Select Search | Find Records form the menu.

B. Click the **KwikSelect** button to access the search categories.
   Click on the **Date** to expand the **Date** searches category, for example.
C. Choose **Date Registered** as the type of search to be performed, for example.
D. Click **OK** to begin the search.
The screen print below shows the results of the search:
## 2.9 Commonly Used Search By Methods:

<table>
<thead>
<tr>
<th>Category</th>
<th>Sub-category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Word Searches</td>
<td>Title Word</td>
<td>Searches title fields of folders, documents and classifications</td>
</tr>
<tr>
<td>Word Searches</td>
<td>Any Word</td>
<td>Searches both the Title field AND the Notes field</td>
</tr>
<tr>
<td>Word Searches</td>
<td>Document Content</td>
<td>Searches the document content for the phrase specified</td>
</tr>
<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 filed/created in TRIM</td>
</tr>
<tr>
<td>Locations</td>
<td>Owner</td>
<td>The office (e.g., branch) to which the document or folder belongs.</td>
</tr>
<tr>
<td>Locations</td>
<td>Creator</td>
<td>The person who put the document, e-mail or folder into TRIM</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Use format = Lastname, Firstname</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If there is more than one location record for a person, choose the one with the green icon.</td>
</tr>
<tr>
<td>Locations</td>
<td>Author</td>
<td>The author of an e-mail or of a document</td>
</tr>
<tr>
<td>Locations</td>
<td>Attached Contacts</td>
<td>This is a broad search that will search multiple fields for the contact information you have specified. (e.g. will find records where that name is an author, addressee, creator, cc’d on an email)</td>
</tr>
<tr>
<td>Number</td>
<td>Record Number Range (Compressed or Expanded)</td>
<td>Entering a range of record numbers in expanded or compressed format, will select all records with numbers within that range.</td>
</tr>
<tr>
<td>User Defined Fields</td>
<td>Several choices</td>
<td>These fields may or may not applicable to your branch/ministry</td>
</tr>
</tbody>
</table>

(e.g., Retrieval Code, Bridge, Project)
2.10 Search Filters

You can filter a search, so that only certain records will be displayed in the search result window. To filter a search, select the search category and then click on the Filter tab to check the items you wish to have included in your search.

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

i. **Disposition** - refers to position of a record within its records management lifecycle. The typical end user will only search for **Active** records, uncheck all others.

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

iii. **Finalised Filters** – Set to Either to search for Un-finalised and Finalised documents.

iv. **File Types** - You may also filter on the type of document by entering the file type extension in the **File Types** field. For example,

```
<table>
<thead>
<tr>
<th>File Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>.xlsx</td>
<td>Excel documents,</td>
</tr>
<tr>
<td>.docx</td>
<td>Word documents</td>
</tr>
<tr>
<td>.pptx</td>
<td>PowerPoint documents</td>
</tr>
<tr>
<td>.vmbx</td>
<td>email messages</td>
</tr>
</tbody>
</table>
```

v. **Record Types** – Click on the Record Types Tab at the top of the window. 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 for more information about the tag function.

**Note:**
If you wish to search for documents, remember to include your ministry document record type (e.g., CS Document)
The filter can be saved, by checking the Save as Default Filters checkbox. This action will cause TRIM to display only records that match the selected filters each time a search is conducted.

vi. **Within another Saved Search** – This feature allows you search within the results of an existing saved search. Click on the Kwickselect icon and a new window will open and you can choose a saved search and your search will be conducted on the files retrieved from that search.

### 2.11 The Tag Function

TRIM has a tag function that is represented by a checkmark. Tagging is used in search results screens and 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 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:**

Be careful when using the Save as Default Filters checkbox since TRIM will apply this filter to all subsequent searches.

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.
The following screen print shows filtering a search on Active Corporate Information Management Branch Physical and Electronic Folders before executing the search.
The following screen print shows the result of a Title Word search on the words ‘Public Accounts Committee’ and filtered on LCS Corporate Information Management E-Folder. Notice that the Tag column has a checkmark in the column heading.

2.12 Sorting a Search

A Search can be sorted so that it is displayed in a specific order.

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

If you left click on a column heading in the Search Results Window, TRIM will automatically sort the columns 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 triangle will appear in the Column to indicate the sort order.

![Sorted Ascending Order](image1)

![Sorted Descending Order](image2)

**Setting the Sort Order before performing the Search**

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 you must select the field to be sorted then check the Descending checkbox.
A. Set the search criteria and filter as required.
B. Click OK to begin the new search.

2.13 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 will be counted but not the contents of the folders.

![Image of TRIM desktop showing records and count]

2.14 Refining a Search

When the search result list is too long, you can refine the current search without having to re-enter your search criteria.

B. Change the search criteria as required. This can include adding/deleting information, filtering or sorting.
C. Click OK to begin the new search.

2.15 Compound Searching (Using AND/OR)

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

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.

A. Insert the first search category and value. If refining a search, this will already be displayed.
B. Click the New button. The first search category and value will be copied into a new line in the Current Selection window.

Note: If the count does not appear in the title bar, it can be accessed by clicking on the Count icon in the toolbar.

Note: When you refine a search, TRIM will replace the current search window with the results of the new search. To go back to previous screen, click on the Previous Search icon on the toolbar or press [Alt][Left arrow] or select Search | Current Search | Go Back.
C. Highlight the copied search category and change it by selecting a new category and value.
D. Select AND or OR (default selection is AND)

<table>
<thead>
<tr>
<th>A</th>
<th>will only return those records that meet all search criteria.</th>
</tr>
</thead>
<tbody>
<tr>
<td>N</td>
<td>D</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>O</th>
<th>will return all records that meet any of the search criteria.</th>
</tr>
</thead>
<tbody>
<tr>
<td>R</td>
<td></td>
</tr>
</tbody>
</table>

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

F. Click OK.

2.16 Compound Searches for Records of a Single Branch

You have seen that each office or branch typically has its own e-folder and p-folder record types, and that 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 (e.g., CS Document)

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 screenshot below shows an AND search including **Owner** and **Title**.

**Note:**
You only need to search by **Owner** if you have access to documents of multiple offices or branches and you want to limit your search to a single branch.

Some information workers and end users may only have access to their own office’s documents, in which case their searches are already limited to records owned by that office.
2.17 Other Options for Compound Searching

New: The New Button adds a new line to your search and the bottom of your existing criteria.

Insert: The Insert Button will add a new line to your search above the currently selected criteria.

Delete: The Delete Button will delete the currently selected search criteria from the Current Selection Box.

(...): The Brackets (...) Button will enable you to group search criteria together or remove existing groupings. 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 add/remove brackets:
- Click to the left of the search criteria to tag with a check mark.
- Click on the Brackets button (...) to remove existing brackets or to add brackets where they do not exist

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.

2.18 Meta-Variables
When searching dates such as Date Registered, you have a choice of using a fixed date or a meta-variable. If you want to do a daily search for records registered that day, rather than using a fixed date (6/6/02) it is best to use the meta-variable Today. That way you will always get the current days records. The date meta-variables are available in the drop down list in the calendar when selecting a date.
Some of the meta-variables available for dates are:

- Yesterday
- Today
- Tomorrow
- Previous Working Day
- Next Working Day

The meta-variable Me can be used when searching locations (e.g. Creator = Me). The meta variable My Unit can be used when searching locations (e.g. Home Location = My Unit)

### 2.19 Summary

In this chapter you learned how to:

1. Perform different searches and use filters
2. Modify the List and View Pane screens.
3. Use the Count function
4. Refine a search
5. Search in TRIM using compound searches (AND/OR)
6. Use meta-variables.
3. Creating Folders

This section will cover how to create electronic e-folders and physical p-folders. Information Workers are responsible for creating the e-folders and p-folders required by end users.

3.1 Objectives

In this chapter you will learn how to:

1. Create p- and e-folders
2. Relate folders
3. View Locations and Groups
4. Change Home Location and Assignee on a physical folder

3.2 What are Record Types

TRIM manages and tracks information using Record Types. A record type defines the data that will be captured and tracked in the system. It also defines the default security and access control levels for an item. Each office or business unit using the system has a set of record types that includes:

- E-folders
- P-folders

Each ministry has a set of ministry-wide record types that includes

- Box – Offsite Transfers
- Box – Onsite Destructions
- Documents

3.3 Folder Numbering

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

For example: - ARCS-01730-02/104A

<table>
<thead>
<tr>
<th>Record #</th>
<th>ARCS</th>
<th>01730</th>
<th>-02 /</th>
<th>1</th>
<th>04</th>
<th>A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Definition</td>
<td>ARCS Schedule</td>
<td>Primary</td>
<td>Secondary</td>
<td>Unique Identifier</td>
<td>Year</td>
<td>Dataset ID</td>
</tr>
</tbody>
</table>
3.4 Creating an E-Folder

Information Workers are responsible for creating e-folders. All electronic documents stored in TRIM must be placed in an e-folder.

There are many options and fields of information available for folders. Creating an e-folder is usually a quick process. Listed below are the basic steps for creating an e-folder.

3.4.1 Creating a Basic E-Folder

A. Launch TRIM Desktop

B. **Toolbar:** Click the ![New Record/Object icon](image)

   OR

   **Keyboard:** [CTRL][N]

   OR

   **Menu:** File | New.

   The New box will open with the Record tab displayed. This will list the record types to which you have access for creating records.

C. In the Record tab, select (by highlighting) the appropriate record type and press **OK** or double-click on the record type.

D. The New Record entry form with several tabular pages will be displayed.
E. The **General** tab is the first screen to be completed when you create a record. You will not be able to continue to the other tabs until all of the mandatory fields have been completed.

1) **Record Classification**
   Add the classification number. This can be done in one of three ways.
   
a. If you know the exact classification you can type it into the **Classification** field. Use the proper format (e.g., ARCS-00100-01 or EDUC-10000-20). Or you can click the **KwikSelect** button and the Classifications list will be displayed.

Note: **ORCS numbers are prefaced with the ORCS acronym, for example: “TRAN”, “ARCH”.**
b. If you know the ARCS or ORCS primary number you can start typing the number in the correct format and the Prefix Search - Number dialogue box will appear.

i. Press [Enter] or click on OK, and TRIM will display that level of classification.
ii. From here, you can click on the plus sign beside the primary number to see the secondary classifications.

c. You can search the classification plan by clicking the Search button at the bottom of the Classifications window.

**Note:**
You can add the note field to the View pane by right-clicking in the view pane and choosing Customise from the fly-out menu. Click on Notes in the Available Fields and Add it to the Displayed Fields.
i. Select **Search by Classification Word** and enter a word from the classification title e.g., **Health**, then click **OK** to begin the search.
d. You can navigate through the classification plan by clicking on the plus sign beside the plan icon and scrolling down until you find the appropriate secondary. The secondary is the lowest level of classification and is represented by a book icon.

Once you have chosen a classification, highlight it and click OK. The classification that you chose will be inserted into the form along with the corresponding retention schedule.

2) **Title [Structured Part]** - TRIM will automatically insert the Classification Level Name into this field.

3) **Title [Free Text Part]** - *Do not leave this field blank*. Enter an appropriate free text title into this field. The title should be meaningful and describe the contents of the record.

**SHORTCUT TIP:** If you are creating a p-folder for this e-folder, then after typing the Title (Free Text Part) of the e-folder, copy it so that you can paste it into the title of the p-folder.
4) **Series Record** -

a. Set as OPR, non-OPR, or Executive. If this is an OPR file, enter “o” in the **Series Record** field. It will auto-populate with “OPR”. If the file is covered by the Special Schedule for Executive Records, enter “exe” and it will auto-populate.

b. If this is a non-OPR file, enter “n” and click on the **TAB** key to stop it from auto-populating with the last used non-OPR choice. Click the **KwikSelect** icon beside the **Series Record** field to bring up the list of non-OPR choices. Highlight the appropriate non-OPR series, and click **OK**. Your choice of non-OPR must match the active trigger designation that displays in the **Retention Schedule** field.

- If the retention schedule begins with **CY**, choose the NON-OPR **CY** series
- If the retention schedule begins with **FY**, choose the NON-OPR **FY** series
- If the retention schedule begins with **SO**, choose the NON-OPR **SO** series

c. When you need to select a **draft** NON-OPR series records, choose one of the following non-OPR draft series.

- NON-OPR CY DRAFT
- NON-OPR FY DRAFT
- NON-OPR SO DRAFT

Your records officer will tell you whether you are to use the draft Non-OPR series records for your ORCS.

Click on the Appropriate schedule then click **OK**

Note:
For reference purposes the non-OPR instructions are given in table form in Appendix A

Note:
Ensure you type ‘n’ and then press the **KwikSelect** icon immediately so that TRIM does not auto-fill in the incorrect series. The series affects the retention schedule and auto-fill will potentially change the retention, so that you will not know what the correct retention should be (CY, FY or SO)
5) **Retention Schedule** – The retention schedule defaults to OPR once the classification is selected.

6) **Retrieval Code** – If using a Retrieval Code for the Folder, enter it in this field.

F. Click **OK** to create the folder

**Note:**

*Once the folder record has been saved, DO NOT change the Series Record as the retention schedule will not update automatically.*
3.4.2 Other E-Folder Fields

If you are creating a new e-folder or editing the properties of an existing folder, you will have access to the following other tabs on the e-folder form.

**Dates/Other Details Tab**

The *Dates* tab is where important dates are recorded.

**Note:**
To edit the properties of an existing e-folder, search for the folder, right-click on, then select Properties from the fly-out menu.

i) *Date Created [Opened]* – Date Created indicates when the folder became available for use. The date defaults to the current date and time and cannot be changed once a record is saved. The Date Created must be backdated at creation, if required. An Information Worker does not have the permission levels to change this date once the record is saved into TRIM.

ii) *Date Closed* – Once a folder is closed, you cannot add documents to it, but you can still find it, and its contents, in a search. The date is left blank at the time the folder is created. The date closed is used for calculating retention of FY and CY folders.

iii) *SO Date* – SO = Superseded or Obsolete. This is the date used for calculation of the retention of an SO folder. This date is a user-defined field and is left blank at the time the folder is created.
Locations/Access Tab
The fields on the Locations/Access tab will be automatically populated. 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.

i) **Owner Location** (does not show on the form) - The Owner Location is the office that has legal responsibility for the record. Typically, the Owner Location is an organizational unit such as a branch. The default is determined by the Record Type.

ii) **Home Location** (does not show on the form) - The Home Location for electronic folders is Electronic Records Only.

iii) **Assignee** - The Assignee is the person that physically has that record in their possession. Assignee is not generally changed for electronic folders and defaults to Electronic Records Only.

iv) **Access Control** - Access controls on an electronic folder control who can view or update the information about the electronic folder and actual electronic documents contained within it, such as Word, Excel and e-mail messages. Access to documents is based on the folder in which they are placed.

v) **Security** - The default Security level is set to Standard. This is a government-wide setting.
vi) Information Security Label – this field allows you to apply a security label to a file using 1 of 6 settings which can be accessed by the Kwickselect button or the drop down menu.

Select From Lookup Items - INFORMATION SECURITY LABEL

<table>
<thead>
<tr>
<th>Lookup Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item</td>
</tr>
<tr>
<td>1. Cabinet Confidential</td>
</tr>
<tr>
<td>2. High Sensitivity</td>
</tr>
<tr>
<td>3. Medium Personal</td>
</tr>
<tr>
<td>4. Medium Sensitivity</td>
</tr>
<tr>
<td>5. Low Sensitivity</td>
</tr>
<tr>
<td>6. Public</td>
</tr>
</tbody>
</table>

Display and/or Modify Notes Tab
The Notes tab allows free form text to be entered. Ensure you use the User Stamp prior to entering a note.
i) **User Stamp** - This button adds the date, time, and current login user id. Enter a User Stamp each time you add a note.

ii) **Spelling** - Use this to manually engage the spell check. However, your note also will be spell checked automatically.

iii) **Add Notes** - This button allows new notes to be added after a record has been created.

### 3.5 Creating a P-Folder

Creating a p-folder is similar to creating an e-folder. ([See 3.4 Creating an E-Folder](#)).

There are a few differences. The **General** tab on the **New Record** entry form has additional fields for **Hardcopy Media Type** and **Alternative Container**.

The **Alternative Container** field in the p-folder New Record form is used to select a related e-folder.

**Note:**

A p-folder may be related to an e-folder and must have the same Record Classification, Title (Structured Part), Title (Free Text Part) and Series Record (OPR or non-OPR) as the related e-folder.
3.5.1 To Relate a P-Folder to its Corresponding E-Folder

The Related Records function in TRIM permits you to relate two or more records to each other. Establishing relationships between records will help keep related records together throughout their life cycle. There are many relationship types available in TRIM.

“Alternatively Within” is the relationship that we use to alternatively contain a p-folder within an e-folder.

**To relate a p-folder to its corresponding e-folder:**

On the **General** tab, click the **KwikSelect** icon beside Alternative Container to search for and select the corresponding e-folder.

OR

Type in the full record number of the corresponding electronic folder.

If you have just created the corresponding e-folder and have not closed its windows, you should be able to see the record number of the e-folder in the window behind.

**Note:**
Your records officer will advise when you should follow these instructions to relate p-folders to corresponding e-folders.

**Careful**
Auto-fill may fill in the incorrect number if you type too slowly.

**To correct an incorrect relationship:**

A. Search for the p-folder.

B. **Right-click** on the p-folder, then select **Properties**.

C. On the **General tab**, delete the number in the Alternative Container field.
D. Click the **KwikSelect** icon beside Alternative Container to search for the correct e-folder to relate to.

E. Click the **Search button**, then execute a search for the correct e-folder.

F. Select the e-folder, then click **OK**.

G. Click **OK** again to save the change and close the Properties dialogue box.

### 3.5.2 Hardcopy Media Type

The **Hardcopy Media Type** field defaults to PAPER – FILE FOLDER. There is a list of other hardcopy media type to choose from. To view the list, click the **KwikSelect** icon beside the field. A lookup set will display a list of choices:

![Lookup Items](image)

### 3.5.3 Dates Tab

If you want to indicate the date range of the documents contained within the physical folder, you can set the Content Start Date and Content End Date by clicking on the calendar icon at the end of each of the fields.

**NOTE:**
If you have a hard copy item that cannot be filed in a regular paper folder because its size or special storage requirements, you should create a supplement record for it in TRIM. See 7.3 for more information on supplements.

**Note:**
Once the record is saved, an Information Worker does not have permission to change the **Date Created**. Only the Administrator, an Information Manager, and some custom users have permission to do so.
i) **Date Created [Opened]** – Date Created indicates when the folder became available for use. It defaults to the current date and time and cannot be changed once a record is created.

ii) **Date Closed** – The date closed is used for calculating retention of FY and CY folders. Once closed, you cannot add documents to a folder. But you can still find it, and its contents, in a search.

   **Leave blank when creating a folder.** DO NOT fill in the close date ahead of time or you will not be able to make new parts (volumes) for the folder.

iii) **Content Start Date** – This field allows you to enter the date of the oldest record in the folder. It may be older than the Date Created (Opened).

iv) **Content End Date** – This field allows you to enter the date of the youngest record in the folder. It may be older than the Date Created (Opened).

v) **SO Date** – SO = Superseded or Obsolete. This is the date used for calculation of the retention of an SO folder. This date is a user-defined field and is left blank at the time the folder is created.
3.5.4 Locations/Access Tab

The Locations/Access tab for p-folders looks similar to an e-folder. When you create a new p-folder, the Owner Location (does not show on the form), Home Location and Assignee all default to be the branch. There are certain situations in which the Home Location and/or Assignee need to be changed.

See section 4.7 for Changing the Location of a Physical Folder.

3.6 Locations, Groups, and Security

Users in TRIM are referred to as Locations. Organizations are also Locations, as are Groups created for security.

If you need to restrict security on certain folders to a certain group on a regular basis, it is best to have a group created to make setting the security and access easier. That way you do not have to add the users individually to the security on the folder; instead, you can simply add the group.

Note: Contact your Records Officer to request a new Group.
3.6.1 Viewing the Locations set up for your Business Unit

A. In TRIM Desktop, select **Search | Internal Location Directory**.

The green 3 people icon = an organization (e.g., a branch)
The green 2 people icon = group
The green 1 person icon = an individual
The red 1 person icon = an external contact
The red 3 people icon = an external organization
B. Type in the name of your business unit or the first part of the name, then click **OK**.

If necessary, scroll down to find the location/business unit you are looking for.

C. Each business unit can be expanded to see the members of that unit. Click on the [+] to expand the folder and see its contents.
D. Most groups (security groups) have the word group in their name. Click on the + to expand the group and see its members.

E. Customize your List pane of your locations directory to add and remove columns by right-clicking a column heading and selecting Format Columns.

**Recommended Columns:**

<table>
<thead>
<tr>
<th>Active Column</th>
<th>Display</th>
<th>Column Width</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Both</td>
<td>Best Fit</td>
</tr>
<tr>
<td>Active?</td>
<td>Both</td>
<td>Best Fit</td>
</tr>
<tr>
<td>Accepting Logins</td>
<td>Text</td>
<td>Best Fit</td>
</tr>
<tr>
<td>Active From</td>
<td>Text</td>
<td>Best Fit</td>
</tr>
<tr>
<td>Active To</td>
<td>Text</td>
<td>Best Fit</td>
</tr>
</tbody>
</table>

Below is an example with columns displayed that allow you to tell if the user is active or not. For historical data reasons, when users leave the ministry their id’s are deactivated but not deleted.
3.6.2 Changing the Location of a Physical Folder

i) **Owner (does not show on the form)** - The Owner is the office that has legal responsibility for the record. The Owner is almost always an organizational unit such as a branch. The Record Type determines the default Owner.

ii) **Home** - Home is where the record resides when it is not checked out. The Home for a p-folder defaults to the Owner and can be changed to another physical location, if appropriate.

   For example, Home may be changed to:
   1) an area office
   2) a different physical location
   3) a box

   In some cases, a record type for a higher-level organization (e.g., a division or a district) also covers individual lower level organizations (e.g., the branches under a division, or the area offices in a district).

   In these cases, the Owner is the higher-level organization and the Home must be changed to the specific lower level organization (branch, area office) where the folder is physically located.

**Note:**
The Home and the Assignee should always be the same, unless a person physically has the folder.
iii) **Assignee** - The Assignee defaults to Home and should be changed when a physical folder is signed out to a person. The Assignee identifies the current location of the folder (e.g., the person that physically has that folder in his or her possession).

iv) **Access Control** - Access Controls control who can view or update the information about the physical folder and physical documents contained within it. Access to documents is based on the folder in which the documents are placed.

v) **Security** - The default Security level is set to Standard. This is a government-wide setting.

vi) **Information Security Label** – this field allows you to apply a security label to a file using 1 of 6 settings which can be accessed by the Kwickselect button or the drop down menu.

---

**3.6.3 Changing the Home of a P-Folder**

The **Home of a p-folder should be changed if the folder resides in an area office or in physical location other than that of the owner branch.** If the location you need is not in the list of choices, please contact EDRMS Help.

A. To view the Locations/Access tab for the folder:
   i. Search for the p-folder
   ii. Right-click on the folder, then select **Properties** from the fly-out menu
   iii. Click on the **Locations/Access** tab

---

**Note:**
Such changes to home are not necessary for e-folders, as the home for e-folders is simply defaulted to “Electronic Records Only” to indicate that there is no physical location for the folders.
B. Drag across the current Home to highlight it, and then press the <Delete> key to delete it.

C. Click on the quick select icon to the right of Home. All Locations will display.

D. Type in your ministry code (e.g. “LCS”) and then press <Enter> or OK to display all the ministry Locations and Groups.

E. Alternatively you could type the code (e.g., “LCS”), a space, and then the first letter of your branch to get a reduced listing.
**Naming convention** – Ministry locations that are not specific branches or business units are given a name of the form “<Ministry code> Location – description”

(e.g., LCS Location – WTS Central Files)

**F.** Scroll through the list to find the location you want. Double-click on the location to select it.

**G. Note:** If the Home location of a p-folder is changed to an area office or to another physical location other than the Owner location, change the Assignee to match the new Home location. If a person has the folder, change the Assignee to that person.

---

**Tip:**
Add the Notes field to the view pane to see notes about each Location.
H. Click OK to finish.

3.6.4 Changing the Assignee of a P-Folder

The Assignee identifies the current location of a p-folder.

As explained above, if the Home of a p-folder is changed from the Owner to an area office or to a physical location other than the Owner branch, the Assignee must be changed to match the new Home.

As well, if a person checks the folder out of the Home Location, the Assignee should be changed to the person who has the folder. Once the person who has the folder returns it, the Assignee should be changed back to match the Home Location.

**Changing the Assignee of a Folder to a Person**

Changing the Assignee can be done through the folder Properties or through the following method:

A. Search for the folder in TRIM.

B. Right-click on the folder, then select **Locations | Assignee** from the fly-out menu.

**Tip:**

To change the Assignee to match the Home Location, press the arrow on the assignee field to display the drop down list and select "<At Home Location>".
C. Click on the **Set to Location** radio button, then click on the quick select icon to the right of **Set to Location** field.

D. Type in the last name of the person who has the folder or the ministry abbreviation (e.g., “CS”) to find an area office, then hit the <Enter> key or click **OK**.
E. Double-click on the correct person. Click OK to finish

Updating the Assignee of a Folder when it is Returned

A. Search for the folder in TRIM. Right-click on the folder, then select Locations | Assignee.
B. Click on the radio button for Set to Home Location, then click OK.

![Image of Set Assignee dialog box]

3.7 Summary

In this chapter you learned how to:
1. Create P- and E- Folders
2. Relate folders
3. View Locations and Groups
4. Change Home Location and Assignee on a physical folder
4. Creating Physical Documents

Typically, physical documents are not tracked individually in TRIM. However, you may want to create a physical document in TRIM to track an important physical item. In this way, you can capture the metadata about physical documents and other physical records (e.g., DVDs, video tapes, maps).

Physical documents are placed in p-folders. All types of physical records use the same record type (i.e., the ministry document type). The p-folder into which you place the document will have a media type associated with it (e.g., paper file, video, DVD).

4.1 Objectives

In this chapter you will learn how to:

1. Create physical documents

4.2 How to Create a P-Document

A. Launch TRIM Desktop.

B. Click the New Record/Object icon on the TRIM toolbar.

   Select the appropriate Document Record Type (e.g., your ministry document type).

C. Click OK to go to the New Record data entry form.

Note: You will only see the record types to which you have access.
D. Type in a **Title** for this record.

E. Click on the **KwikSelect** icon to select the p-folder in which the document belongs.

i. Your **My Containers** list will display by default. If the folder you want is in the **My Containers** list then you can select it from there. **My Containers** shows the last 25 folders into which you filed a document or e-mail.

ii. If the folder you want is in the **Favourite Records** list, you can click on the **Records** icon in the **Favourites** shortcut bar at the left and select it from there. **Favourite Records** contains folders that you have manually put into the list.

iii. If the folder is not in your **My Containers** or **Favourite Records** list, click on the **Find Records** icon in the TRIM toolbar and conduct a search to find the p-folder. **Suggestion**: Search by **Title Word**.

Select the appropriate p-folder and click on **OK**.
F. Click the **Dates/Other Details** tab.
G. **To Assign an Author:**

Click the **KwikSelect** icon beside the **Author** field and select from the list. Type in first few letters of the last name, then press the **<Enter>** key to advance through the list.

**To Create a new Author:**

If the **Author** you want does not exist in the list, you can create a new External Author (someone who is not a TRIM user). Look through the locations list and ensure the **Author** does not already exist before creating a new **Author**.

i) To create a new **Author**, click the **KwikSelect** icon beside **Author**

ii) Right-click in the **Locations** window

iii) Select **New Location** | **New Organization** or **New Person** from the fly-out menu.

![KwikSelect Icon](image)

iv) If you are entering a new **Person**, click on the **Details** button and enter the appropriate data in the **Name Details** entry form. Click **OK**. Enter any additional information you would like on the other tabs of the **New Person** data entry form (e.g., Notes). Click **OK**.
v) If you are entering a new **Organization**, type in the name of the **Organization** and any additional information you would like on the other tabs (e.g., Notes), then click **OK**.

**Note:**
People’s names are typed **firstname lastname**
vi) Click **OK** again and the **Author** field will be populated.
H. If required, click the Notes tab and add any Notes that pertain to the document. Click the User Stamp button before typing notes.

I. Click OK and the p-document is created.

4.3 Summary

In this chapter you learned how to create physical documents and add new external organizations and people to the Locations table.
5. Printing Reports and Labels

TRIM provides the capability of printing a variety of reports, barcode labels, and consignment lists. TRIM comes with a variety of default report layouts. The data within the reports comes from search results. Contact your Information Manager if a new report is needed.

6.1 Objectives

In this chapter you will learn how to print labels and reports.

5.2 Printing Labels

TRIM treats a label as a report, so we will use the Print Report function to print labels. The basic steps for printing labels are:

A. Search for the folder(s).

B. Right-click in the search results list pane and select Tag All or individually tag the folders for which you want to print labels.

Hint: Filter by Paper Folders
C. To print the report, select **File | Print** from the TRIM menu bar

OR

Click the **Print Report** ![icon](image) icon on the toolbar

OR

Right-click and select **Send To | Print Report** from the fly-out menu.

D. If printing multiple labels, click **OK** to confirm that you want to print all tagged folders.
E. Select the appropriate label report layout from the list of available reports.

F. If printing on a partial label sheet, select the number of labels to skip.

G. If required, select **Manual Feed**.
H. Click the Preview button to see how the label(s) will look when printed.

I. Click on the Print Report icon to print the label(s) from Preview Preview.

OR

Click the X to close Preview Preview and return to the Reports screen, then click the Print button.

5.3 Printing Reports

Printing reports in TRIM Desktop involves searching for specific records, sorting the results, tagging the records, selecting the type of report to be printed, and then sending to the printer.

A. Search for the desired electronic and physical folders, ensuring that you Filter by the appropriate record types.

B. Execute the search.

C. Sort the search results by clicking on the appropriate column heading. For example, for numeric reports, sort on the Record Number column. For alphabetic reports, sort on the Title (Free Text Part) column.

D. Tag the records in the search results that you want to appear in the report. To tag, right-click and choose Tag All; or tag items individually; or tag the first in a series of items, hold down the Shift key and tag the last in the series.

E. Select File | Print Report

OR

Click the Print Report icon on the toolbar to print the report.
F. If multiple records are tagged, click OK to confirm all records.

G. Choose the desired Report and preview the report to make sure the information is correct.
H. If required, select a different printer and/or Manual Feed.

I. Click the **Print** button to send the report to the printer.

### 5.4 Summary

In this chapter you learned how to print labels and reports.
6. Folder Maintenance

An Information Worker has permission to make certain modifications to records as well as perform some maintenance functions in TRIM. These include creating new parts to a file as the previous parts become too large, creating supplements, and bulk updating folders.

6.1 Objectives

In this chapter you will learn how to:

1. Create a new part to a folder
2. Create a supplement to a folder
3. Close a folder
4. Move documents to a new folder
5. Rename a folder
6. Identify or mark a folder for deletion
7. Reclassify a folder
8. Bulk update folders
9. Navigate amongst folders and documents

6.2 Creating a New Part

When a folder becomes too full it is necessary to create a new part to that file. TRIM retains the existing record number but allocates a new part. A relationship will automatically occur linking the parts together.

Parts are usually needed only for physical files (i.e., when there are more documents in a file than can fit within one physical folder).

E-folders do not have the same constraints regarding the number of documents they can hold. Normally it is best not to create parts for e-folders (to avoid the complications for end users noted in the box below).

However, since performance issues can occur if very large numbers of documents are placed in an e-folder (e.g., over 300 documents), it may in rare cases be desirable to create e-folder parts.
Please note the following:

- You cannot add a new part to a closed folder.
- When you make a new p-folder part, the new part does not automatically relate to the e-folder. **You must manually relate the new part to the corresponding e-folder.**
- If an e-folder has multiple parts, relate all p-folders to the first part only.
- When you make a new part, the existing part is automatically closed. Once an e-part is closed, end users cannot put documents in it anymore. Users will have to find the newest part of the e-folder for filing purposes and remember to look in two e-folders to find what they are looking for. They may also want to update their Favourites lists.
- Contact your Information Manager if for some reason a document needs to be placed in a part that is closed.

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

B. Right-click on the folder and choose **New | New Part** from the fly-out menu.

---

**Hint:**
To determine the number of documents in an e-folder: Find the folder, right-click on it and then select **Contained Records** from the fly-out menu.
C. In the **Create New Part** dialogue box, click **OK** to accept the defaults of **Locate New Part with Previous Part** and **Copy Notes**.

![Create New Part dialogue box]

TRIM will automatically close the previous part by adding a **Date Closed**, which will prevent further records from being added to that file.

The list pane in the search results window now will display the closed previous part and the new

![Search results window]

Multiple part folders will show with a tilde (~) and the part number at the end of the record
D. Relate the new part of the p-folder to part 1 of appropriate e-folder.
   i. Right-click on the new part, then select **Properties** from the fly-out menu.
   
   ![Properties dialog box]

   ii. On the **General** tab, click the **KwikSelect** icon beside the **Alternative Container** field to search for and select the corresponding e-folder.

   ![Properties dialog box showing KwikSelect]

**Note:**
See section 4.5.1 for instructions on how to relate a p-folder to its corresponding e-folder.
6.3 Creating a Supplement

Supplements are physical documents that comprise part of a file, but because of their size or other storage requirements, are not contained in the file’s physical folder(s). For example, large maps, sets of x-ray films, or videotape cassettes may be supplements.

Supplements may also consist of collections of documents that are filed together, but do not conform to the date cut-off/folder closure rules associated with folder parts. (See section 7.2 for more information on folder parts.) For example, a project file may consist of different folders documenting various aspects of the project.

To show the relationship in TRIM between a supplement and its corresponding folder, you use the “Alternatively Within” relationship, that is, you alternatively contain the supplement in its corresponding folder, as explained below.

If the supplement is part of a file that has an e-folder, you alternatively contain the supplement in the e-folder.

If the file consists only of physical records, you alternatively contain the supplement in the corresponding p-folder.

The following explains the most common situation where you create a supplement to an existing p-folder:

A. Find the p-folder for which you will create a supplement. Right click on the folder, choose New | Copy Record.
B. Select the properties to copy over to the supplement record and click **OK**.

Note: Typically **Date Fields** are **NOT** copied over, as the dates of the supplement may differ from the dates of the corresponding folder.

C. Right-click on the supplement record and choose **Properties**.
D. Add SUPP01, followed by a space, at the beginning of the Free Text Title. (The SUPP prefix is required on all supplemental records. Supplements are numbered sequentially SUPP01, SUPP02, etc.)

E. In the Alternative Container (Folder/Box) field, enter or select (via the Kwikselect button) the folder number of the folder in which the supplement will be alternatively contained. Remember, if there is an e-folder corresponding to the Supplement, select the e-folder. Otherwise, select the p-folder corresponding to the Supplement.

F. At the Hardcopy Media Type field, click the KwikSelect button and choose the appropriate type.

G. At the remaining tabs, review and update information as required (e.g., the Supplement may need to be given a different Home Location than the p-folder from which the Supplement record was copied).

H. Click OK to save the information and create the Supplement.
6.4 Closing a Folder

Once a folder is closed, you cannot add documents to it or reopen it.

Folders with a CY (calendar year) retention should be closed on December 31 of the year in which they were opened. Folders with a FY (fiscal year) retention should be closed on March 31, the end of the fiscal year.

There are two ways to close a folder in TRIM: by creating a new part (the first part will automatically be closed), or by manually closing the folder.

6.4.1 Manually Closing a Single Folder

To manually close a single folder:

A. Search for the folder to be closed.
B. Right-click on the folder, then select Properties from the fly-out menu.
C. In the Dates tab, enter the date the folder is closed by using the Calendar icon at the end of the Date Closed field, clicking on the date, then clicking OK.

D. You can also manually type in a time to the right of the Date Closed field, if desired.
E. Click OK to finish.

Note:
Closing a folder may have affect the retention of the documents. Folders with CY or FY retention periods will be closed as a standard business practice on the appropriate dates.

Note:
If the folder has an SO active retention period trigger, you must enter both the Date Closed and SO dates.
6.4.2 Manually Closing Folders in Bulk

You can manually close multiple folders by the Tagging folders and using the Dates menu item available on the right-click fly-out menu.

To manually close multiple folders:

A. Search for the folders to be closed.
B. Tag all the folders to be closed
C. Right-click on any of the folders to be closed (you may scroll up and down to tag all).
D. Right-click anywhere in the List Pane and select Details | Dates
E. Click **OK** to the **All Tagged Rows** prompt.

F. Check the box to the left of the **Date Closed** field. By default today’s date and time are displayed. Modify the date and time using the calendar icon to the right of the **Date Closed** field.

G. Click **OK**, all of the folders tagged will be closed.
6.5 Moving Documents to a Different Folder

Documents placed in the wrong folder can be moved.

A. Search for the document(s).

B. Tag the documents you would like to move.

C. Right-click on a tagged document, then select Locations | Container

D. If you are moving more than one document, click OK to the All Tagged Rows prompt.
E. Click on the **KwikSelect** icon beside the **Set Container (Folder/Box) To** field to search for and select the folder to move to, or select from the drop-down list.

![Record Container (Folder/Box) - All Tagged Records](image)

F. Click **OK**.

G. Click **Yes to All** to confirm for all records.

![Record Container (Folder/Box) - All Tagged Records](image)

### 6.6 Renaming a Folder

A. Search for the folder to be renamed.

B. Right-click on the folder and then select **Properties** from the fly-out menu.

C. Change the **Free Text Title** to the new name and then click **OK** to save the changes.

---

**Note:** Remember to change the names of any contained p-folders, supplements, or parts.
6.7 Deleting a Folder

Information Workers cannot delete folders from the database. You must request deletion from EDRMS Help.

A. Review the contents of the folder to ensure that is empty.
B. If it contains documents, move them to the correct folder or confirm that they were filed in error and should be deleted from TRIM (i.e., transitory or personal).
C. Right-click on the folder and select Send To | Mail Recipient from the fly-out menu.
D. Check the TRIM Record Reference box and OK.

E. 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.

6.8 Reclassifying a Folder

If you have incorrectly classified a folder, please contact the EDRMS Help to have them reclassify the folder.

Note:
See the TRIM Tip Reference for a Group of Records for instruction on how to create and send a TRIM reference to a group of records.
6.9 Bulk Updating Folders

Some meta-data fields can be updated on multiple folders simultaneously

<table>
<thead>
<tr>
<th>Select:</th>
<th>To bulk update:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notes</td>
<td>Notes</td>
</tr>
<tr>
<td>Additional Fields</td>
<td>SO Date, Content End Date, Retrieval Code, Accession Number.</td>
</tr>
<tr>
<td>Dates</td>
<td>Date Closed</td>
</tr>
</tbody>
</table>

A. Search for the folders you want to update.
B. Tag the folders.
C. Right-click on a tagged folder, select Details and Notes, Additional Fields, or Dates from the fly-out menu.

**Hint:**
Do not bulk update notes with information that you will want to remove later (e.g., “Label required for this folder.”)
i. **Notes** - Type your note, add user stamp, and click **OK**.

![Image of Notes dialog box]

ii. **Additional Fields** - Select the field you want to modify, and then click the **Modify** button, enter the new value, and click **OK**.

![Image of Additional Fields dialog box]
iii. Dates – Check the box beside the desired date field and enter a new date using the calendar icon to the right of the date field.

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

E. Click the **Yes to All** button.
6.10 Navigating amongst Folders and Documents

You can navigate between folders and documents using some of the customizable fields in the View pane and also using the Navigation command from the menu.

6.10.1 Navigating with fields in the View Pane

A. P-folders (blue folder icon)

If you have customized your View pane to add the Alternative Container field, it will show the related e-folder. Double-click anywhere on that Alternative Container field entry in the view pane to access the e-folder. Click on the plus sign beside the folder to see its contents.
B. Documents

If you have customized your View Pane to add the Folder field, double click anywhere on the Folder field in the View Pane to access it and then click on the plus sign to see its contents.

6.10.2 Using the Navigation Command

Use the navigation command to see what is contained within a folder or to see the container (folder) for a document or folder. Use it also to move between folder parts.

A. To navigate from the current record to others it is related to, right-click on the record then select Navigation from the fly-out menu.

The Navigation fly-out menu is dynamic and will change depending on the properties of the record you have clicked on.

An e-folder that contains documents and a p-folder.
A p-folder that has multiple parts

A p-folder that is contained within an e-folder and is also in a box.

When you navigate using the navigate command, TRIM will replace the current search window with the results of the navigation. To go back to previous screen, click on the Previous Search icon on the toolbar or press [Alt][Left arrow] or select Search | Current Search | Go Back from the TRIM menu bar.

6.11 Summary

In this chapter you learned how to:

1. Create a new part to a folder
2. Close a folder
3. Move documents to a new folder
4. Rename a folder
5. Identify or mark a folder for deletion
6. Reclassify a folder
7. Bulk update folders
8. Navigate amongst folders and documents
7. Other Search Features

7.1 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
5. Turn on the Shortcuts toolbar

7.2 Saving Searches

Saved Searches are when you save a set of search criteria, which can be used to conduct the same search in the future. A saved search does not save the search results. Therefore, each time you use the saved search, you will get the latest information. TRIM users can save and delete their own saved searches.

7.2.1 Save a Search

A. Perform the search you want to save.
B. Right-click anywhere in the search results View pane and select Search | Save Search as from the fly-out menu.

Note:
The saved searches you create are only accessible by you. An Information Manager or Administrator can create saved searches that can be used by everyone or selected groups of people.
C. Enter the following details into the New Saved Search dialogue box.

Enter the following details:

i. **Search Name**: Enter a name that will be easy to identify the next time you use the saved search list. This field is a maximum of 30 characters. Each Saved Search name must be unique to the database.

ii. **Description**: By default TRIM inserts the search method and value. Modify the description field if you want a more detailed description of the search.

iii. **Click on Edit Query**, which will open a new window with Search, Sort, Filter and Record Type Tabs to further modify the search and how the results will be listed.

iv. Click **OK**.
7.2.2 Accessing a Saved Search

A. Select Search | Saved Searches OR press [Ctrl][G].

A list of all available Saved Searches will display.

B. Double Click on the desired Search and the results will be displayed.

7.3 Favourites

You can set up Favourite lists for many different items to make working in TRIM more efficient. The Favourites Toolbar at the left of the TRIM Desktop main screen makes it easy to access your Favourites.

7.3.1 Adding a Saved Search to Favourites

A. From the TRIM menu bar, select Search | Saved Searches OR press [Ctrl][G].

B. Tag the specific saved searches that you wish to add to your Favourites by clicking to the far left of the row (under the checkmark).

Note:
Put your ministry code (e.g., CS, TR, FIN) and your initials at beginning of the Search Name
C. Right-click anywhere on the Saved Searches - All list screen and select Send To | Favourites from the fly-out menu OR press [F4]. Click OK to the All Tagged Rows prompt. Your saved searches are now in your favourites.

7.3.2 To View your Favourite Saved Searches

Click the Saved Searches icon in the Favourites toolbar.

The Favourites Saved Searches list will be displayed.

<table>
<thead>
<tr>
<th>Favourite Saved Searches</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>MY OFFICE’S RECORDS</td>
</tr>
<tr>
<td>GOV - APP READY FOR DE</td>
</tr>
<tr>
<td>GOV ROLLOVER CY</td>
</tr>
<tr>
<td>GOV ROLLOVER FY</td>
</tr>
<tr>
<td>CIMB ELECTRONIC FOLDERS</td>
</tr>
<tr>
<td>CIMB ALL FOLDERS</td>
</tr>
</tbody>
</table>

7.3.3 Removing Saved Searches

The All Saved Searches list includes searches that you have created for personal use, plus searches created by the Administrator or an Information Manager for use by a specific group of people (and you are a member of that group), and searches created for all users. Your Favourite Saved Searches list is a subset of the All Saved Searches list.

You can remove your saved searches from the All Saved Searches list and from your Favourites Saved Searches list. If you remove a search from the All Saved Searches list, it is automatically removed from your Favourite Saved Searches list. The converse is not true. If you remove a search from your Favourite Saved Searches list, it still exists in the All Saved Searches list.

7.3.4 Removing a Search From Your Favourite Saved Searches

A. Click the Saved Searches icon in the Favourites toolbar.
B. Right-click on the search you want to remove, then select **Remove from Favourites**.

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

### 7.3.5 Removing a Search from your All Saved Searches list

A. Select **Search | Saved Searches** from the TRIM menu bar OR press `[Ctrl][G]`.

B. **Right-click** on the search that you want to remove, then select **Delete**. The search will be removed from both your All Saved Searches list and Your Favourites.

**Note:**
From the All Saved Searches list you can only remove searches that you created or that you have special permission to delete.
7.3.6 Adding Folders to Favourites

TRIM allows you to add your most frequently used folders to the Favourite Records shortcuts toolbar.

Once folders have been added to your Favourite Records, they will be easy to access when selecting a folder to catalogue an email message or register a document (no need to search).

A. Search for the folders you use on a frequent basis.
B. Tag the folders.
C. Right-click on one of the tagged folders, then select **Send to | Favourites**.

**Tip:** Remember to filter by folder type.
D. Once added, click on the Favourite Records icon on the Shortcuts toolbar to access your favourite folders.

E. Favourite Records can also be used as a search criteria and can be found using the kwikselect icon for the search by field in the search window.

7.3.7 How to Turn on the Shortcuts Toolbar

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

A. Select View | Toolbars | Customize from the TRIM menu bar.
B. Click on the **Toolbars tab**.

![Toolbars tab screenshot](image)

- C. Ensure the Shortcuts toolbar is checked.
- D. Click **Close**.

### 7.4 Summary

In this chapter you learned how to:

1. Add/Remove Saved Searches to/from Favourites
2. Add Folders to Favourites
3. Turn the Shortcuts toolbar on
8. Getting Help

8.1 TRIM Business Help

Information Workers are the first line of support for the end users in their office.

If you have a TRIM issue that you cannot resolve send an e-mail to EDRMS Help.

8.2 Requesting New Users ids/New Groups/New TRIM Installations

Requests for User ids, Security Groups or TRIM installations will be processed through a request by the Information Worker to EDRMS Help. Please provide the required information as listed below.

To request a new user id:
- The user’s full name (First name, Initial and Last Name)
- The user’s IDIR id
- The user’s phone number
- The Branch or Department they are a member of in TRIM
- Name of their TRIM Information Worker
- Whether the new user is a Ministry employee or Consultant
- The TRIM role the person requires (i.e., Information Worker or End User)
- Any special TRIM groups of which they should be a member.

To request a new group:
- The business unit that the group belongs to (e.g., Information Systems Branch)
- The group name you want to use
- The members of the group

To request a new TRIM installation:
- The name of the user
- The user’s phone number
- The user’s location/address
- The workstation number
- The account coding
- The Project name
8.3 Requesting Changes to Groups or Deactivation of Users ids

Send an e-mail to EDRMS Help to request changes to Users or Groups. Please remember to notify EDRMS Help when a user leaves the Ministry so that the user’s ID can be de-activated to ensure he/she no longer has access to records of a former office.
Appendix 1

Guidelines for Entering Series when Creating a Folder Record

The Series record determines what retention schedule is attached to the folder.

OPR folders are placed in the OPR series and then automatically receive the appropriate OPR retention schedule from the folder classification.

Non-OPR folders are placed in one of the NON-OPR series and receive a standard Non-OPR retention schedule.

To choose the Non-OPR series, look at the OPR retention schedule (displayed automatically in the TRIM New Record dialogue box when you enter the folder classification) and then select the corresponding Non-OPR series as instructed below.

<table>
<thead>
<tr>
<th>Select this Series</th>
<th>TRIM Applies</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPR folders</td>
<td>OPR</td>
</tr>
<tr>
<td></td>
<td>The OPR retention schedule for the classification</td>
</tr>
<tr>
<td>Non-OPR folders (ARCS and TRIM ready ORCS)</td>
<td></td>
</tr>
<tr>
<td>OPR retention schedule starts with CY</td>
<td>NON-OPR CY</td>
</tr>
<tr>
<td>OPR retention schedule starts with FY</td>
<td>NON-OPR FY</td>
</tr>
<tr>
<td>OPR retention schedule starts with SO</td>
<td>NON-OPR SO</td>
</tr>
<tr>
<td>Non-OPR folders (ORCS that are not TRIM ready)</td>
<td></td>
</tr>
<tr>
<td>OPR retention schedule starts with CY</td>
<td>NON-OPR CY DRAFT</td>
</tr>
<tr>
<td>OPR retention schedule starts with FY</td>
<td>NON-OPR FY DRAFT</td>
</tr>
<tr>
<td>OPR retention schedule starts with SO</td>
<td>NON-OPR SO DRAFT</td>
</tr>
<tr>
<td>Executive folders (e.g. ADM or DM office folders)</td>
<td>EXE</td>
</tr>
</tbody>
</table>

*Note: Your records officer will advise on whether your ORCS are “TRIM ready” or whether you need to use one of the DRAFT NON-OPR series below for your ORCS.*