

EDRMS TRIM Tip Relationships

Primary audience: Information Workers

TRIM allows you to relate two or more records to each other. Relationships are a way of grouping records with related information together. To see the relationships for a given record, go to the **Properties** of a record (right click > properties).

Automatic Relationships

Some relationships are established automatically when the records are created.

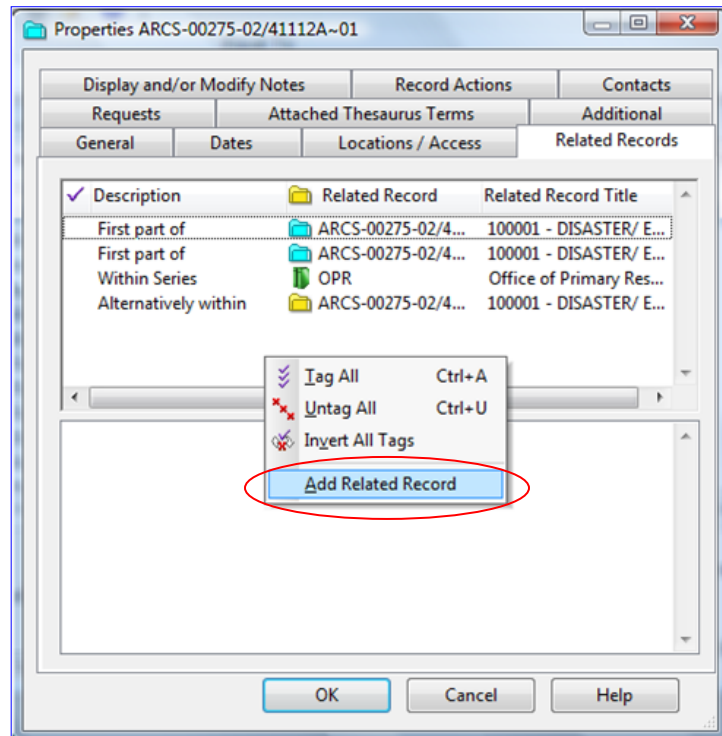
- All folders are related to their status of OPR, non-OPR, or Executive.
- If part of a multi-part set, the record is identified as a later or earlier part of another part.

Manual Relationships

Some relationships must be established manually.

To establish a relationship

- Right click on the record and select **Properties** from the drop down menu.
- Click on the **Related Records** tab.
- Right click on the white space of the view pane in the Related Records tab and select **Add Related Record**.
- Click on the drop down arrow for **Relationship Type** and choose the appropriate relationship type



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Mandatory Relationships

Some relationships are required to be established during the folder creation process.

- Supplementary files are connected to their corresponding paper or electronic folders with the **Alternatively within** relationship.
- Physical file folders are connected to their corresponding electronic folders with the **Alternatively within** relationship.

For guidance on how to relate a supplement to its corresponding paper folder or how to relate a p-folder to its corresponding e-folder, see the TRIM Information Worker Folder Training Guide.

The screenshot shows the 'Properties' dialog box for a record with ID 'ARCS-00275-02/41112A~01'. The 'General' tab is active, showing fields for Classification, Title (Structured Part), Title (Free Text Part), Series Record, Retention Schedule, Alternative Container (Folder Box), and Retrieval Code. The 'Alternative Container (Folder Box)' field is highlighted with a red circle and contains the value 'ARCS-00275-02/41012A'. Other fields include 'Classification' (ARCS-00275-02), 'Title (Structured Part)' (100001 - DISASTER/ EMERGENCY RESPONSE PLANNING - Emergency evacuation procedures), 'Title (Free Text Part)' (548 Michigan St - Ray), 'Series Record' (OPR), and 'Retention Schedule' (SO NIL DE).

The screenshot shows the 'Add Related Record' dialog box. The 'Relationship Type' dropdown menu is open, displaying a list of relationship types: 'Related to', 'Copy of', 'Supersedes', 'Attached To', 'Alternatively within', 'Redaction Of', 'Reply To', 'Original of', 'Is superseded by', 'Has Attachment', 'Alternatively contains', 'Was Redacted To', 'Has Reply', 'Latest Part Of', and 'Latest Version Of'. The 'Related to' option is selected and highlighted in blue. The dialog box also includes 'OK', 'Cancel', and 'Help' buttons.

Optional Relationships

- TRIM has a variety of relationship types. For example, the **related to** relationship creates a simple relationship between two or more records. It is a relationship that occurs in both directions and can be used to provide a cross-reference from one record to another.

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