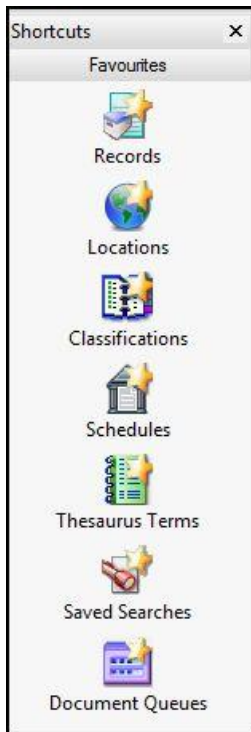


EDRMS TRIM Tip Shortcuts

Primary Audience: All Users

The TRIM Shortcut Menu along the left of the TRIM Desktop display provides quick access to collections of records. Some shortcuts are created automatically (e.g. **Recent Documents**, **Offline Records**); others you can add to and delete from.



To add to one of the **Favourites**, tag the record(s) and click on the F4 button. To remove records, tag or highlight, right-click | Remove From | Remove from Favourites.

Schedules and **Thesaurus** are not used.



My Container displays the last 25 container (folders or boxes) you have used.

Recent Documents displays the last 25 documents you have used. You can also add or remove records from these lists.



Records Work Tray: You can add or remove records for quick retrieval as you work with them. To add, tag records, press F3. To remove records, tag or highlight, right-click, remove from, remove from work tray.

Records In & Records Due trays are not used.

Offline Records displays the documents you are currently working on, both drafts and those checked out from TRIM.

User Labels: This is another area where you can add or remove record shortcuts for quick retrieval. You can add categories and sub categories to User Labels to manage records, with custom titles and icons.