

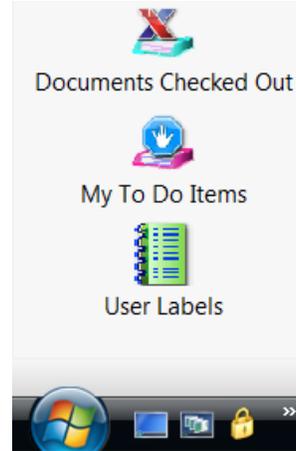
EDRMS TRIM Tip User Labels

Primary Audience: All Users

User Labels allow TRIM users to create their own system of grouping records shortcuts. The great advantage of creating User Labels is a user can customize a directory of records shortcuts that makes sense for their business needs. Each User Label can have multiple sublevels and there is no limit to the number of User Labels that can be created.

Create User Labels

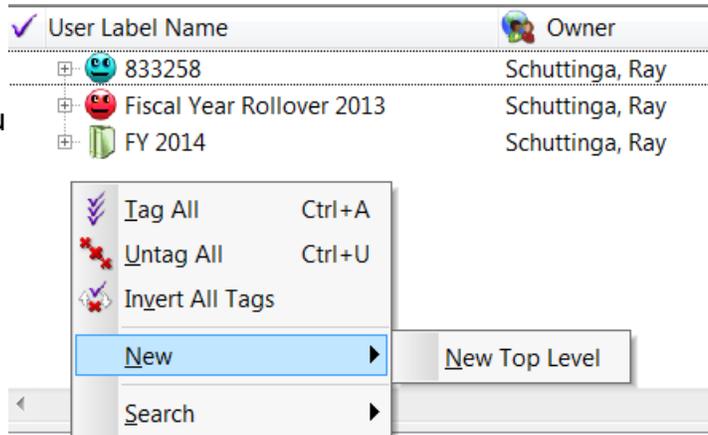
To navigate to the User Labels, select Trays from the Shortcut Pane (the left side of the interface). You can also navigate to them by selecting Tools > User Labels.



To create a new User Label:
Right click > New > New Top Level

Enter in a name for your User Label (and choose a unique icon if desired). This is now an area in TRIM where you can save your own private shortcuts, a means of navigating to your records without having to perform a search.

To create a sub-level of a User Label, highlight the existing User Label > New > New Lower Level.



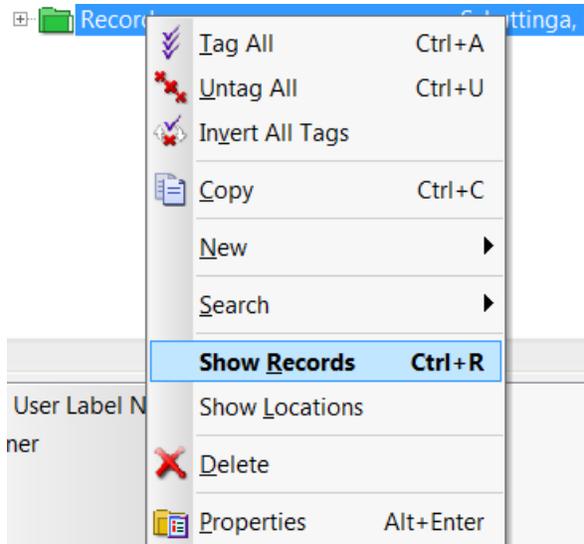
Search for the records to send to User Labels

To send records to a User Label:
Tag the record(s), Right click > Send To > Add to User Label
Select the appropriate User Label and click OK.

View record shortcuts in the User Labels

Navigate to your user label. To view the shortcuts you have created in your User Label, you can either:

- Double click on the User Label, or
- Right click on the User Label > Show Records



The next screen will show you all of your records that you have sent to your User Label.

You can keep adding as many records as you'd like to the User Label, at any time. If you no longer wanted a shortcut in the User Label, you can tag the record(s), Right click > Clear.

Remember, you are clearing out the shortcut to the record, not deleting the record itself.

To modify a User Label

Right click on the User Label > Properties
You can modify the title and/or the icon.

To remove a User Label

When you no longer need a User Label and want to remove it:
Right click on the User Label > Delete