




TRIM

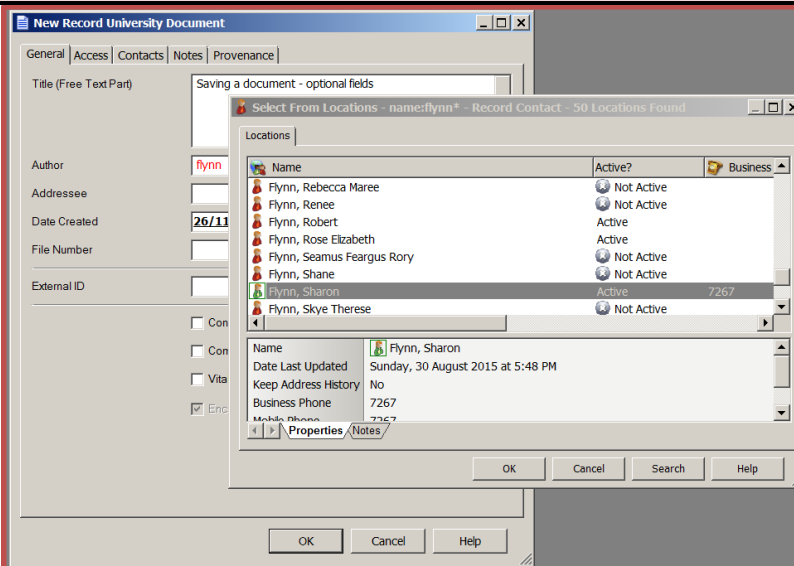
Saving a document – optional fields

When saving a document, you may also complete the following *optional* information

Maximise your screen to see the entire Record Entry Form

Type your surname into the **Author** field and click the KwikSelect  button to the right to display a list of all contacts

Select your name and click **OK** to add it to the **Record Entry Form**

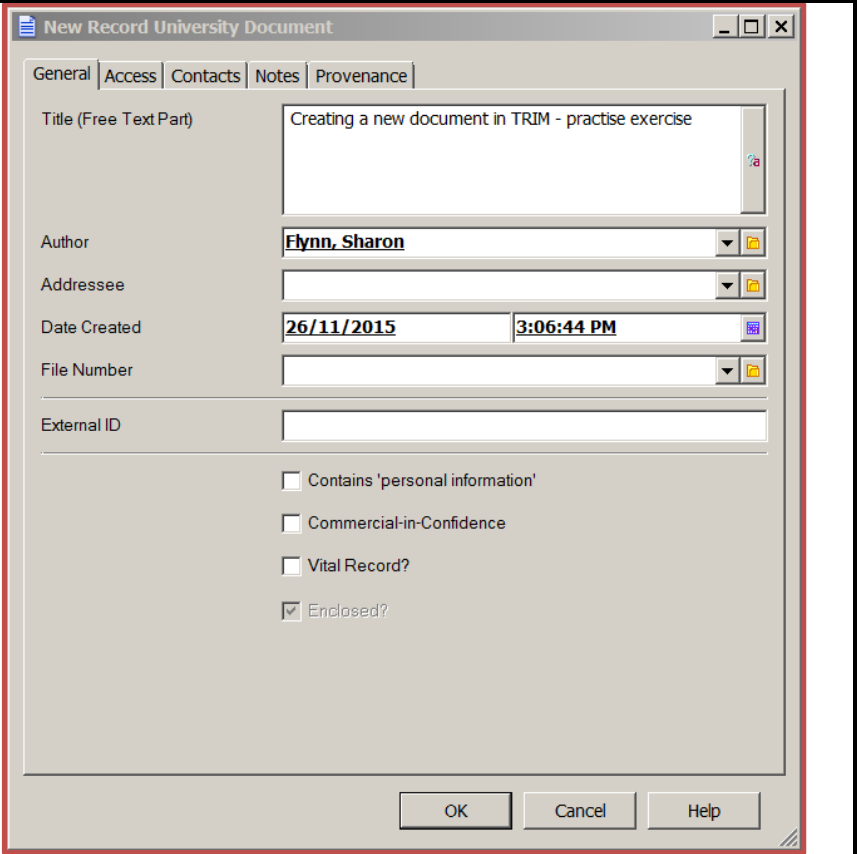


This brings you back to the **Record Entry Form** with your name in the **Author** field

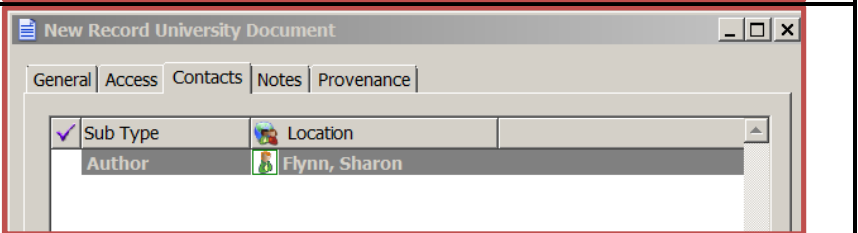
Check the **Vital Record** box if the document is vital to the operation of your unit

Check the **Commercial-in-confidence** box if the record is of a commercial nature

Click the **Contacts** tab

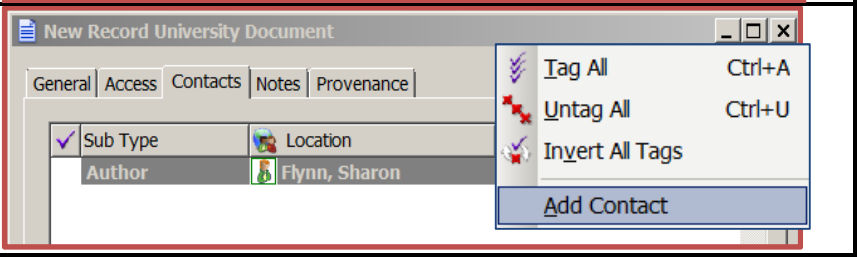


If you wish to add additional Contacts to this document continue as follows



Right click anywhere in the white box

Choose **Add contact**



Type the name of the additional person into the **Contact Name** field

Select from the dropdown list in **Contact Type** field

Click **OK** to add the new contact

Click the **Notes** tab

Click **Add Notes** button

Type in additional notes about the document you are creating, this is a searchable field and information added here may be useful in future searches.

Click **OK**

The image shows two overlapping windows. The top window is titled "Add New Contact -" and contains a "Contact" tab. It has a "Contact Name" text box with "Flanagan, Barry" entered, a "Contact Type" dropdown menu with "Client" selected, and two checkboxes: "Make Primary Contact" (unchecked) and "Only if No Primary Contact Exists" (unchecked). At the bottom are "OK", "Cancel", and "Help" buttons. The bottom window is titled "New Record University Document" and has tabs for "General", "Access", "Contacts", "Notes", and "Provenance".

The image shows the "New Record University Document" window with the "Notes" tab selected. An "Add Annotation" dialog box is open, showing a text area with the text "This document is used for training purposes only". Below the text area are radio buttons for "At the Start" (selected) and "At the End", and a checked checkbox for "Insert the new notes with a user stamp". There is a "Spelling" button. At the bottom of the dialog are "OK", "Cancel", and "Help" buttons. Below the dialog, in the main window, are buttons for "User Stamp", "Spelling", and "Add Notes". At the bottom of the main window are "OK", "Cancel", and "Help" buttons.

The **Notes** will be added with your name and date attached.

Click **OK** to finish saving to **TRIM**

The screenshot shows a dialog box titled "New Record University Document" with a tabbed interface. The "Notes" tab is selected, showing a text area with the following content: "Thursday, 26 November 2015 at 3:50:40 PM (GMT+11:00) Flynn, Sharon:" followed by "This document is used for training purposes only". Below the text area are three buttons: "User Stamp", "Spelling", and "Add Notes". At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".