



TRIM Relating Files

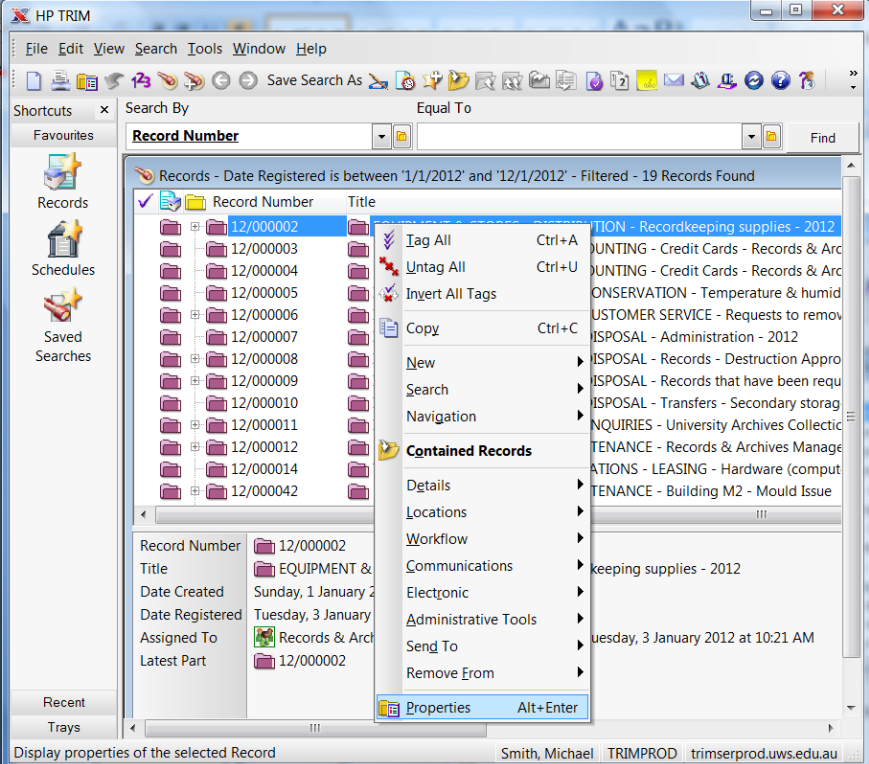
Relationships (cross-referencing) can be established between files in TRIM through the *Related Records* function. You can only relate files that you have access to.

To be able to view related records 'at a glance' you can customise your *Record View Pane* (bottom half of the TRIM screen) to include *Related Records*.

Open TRIM and Search for the file that is to be related

Right-click on the file

Select: Properties

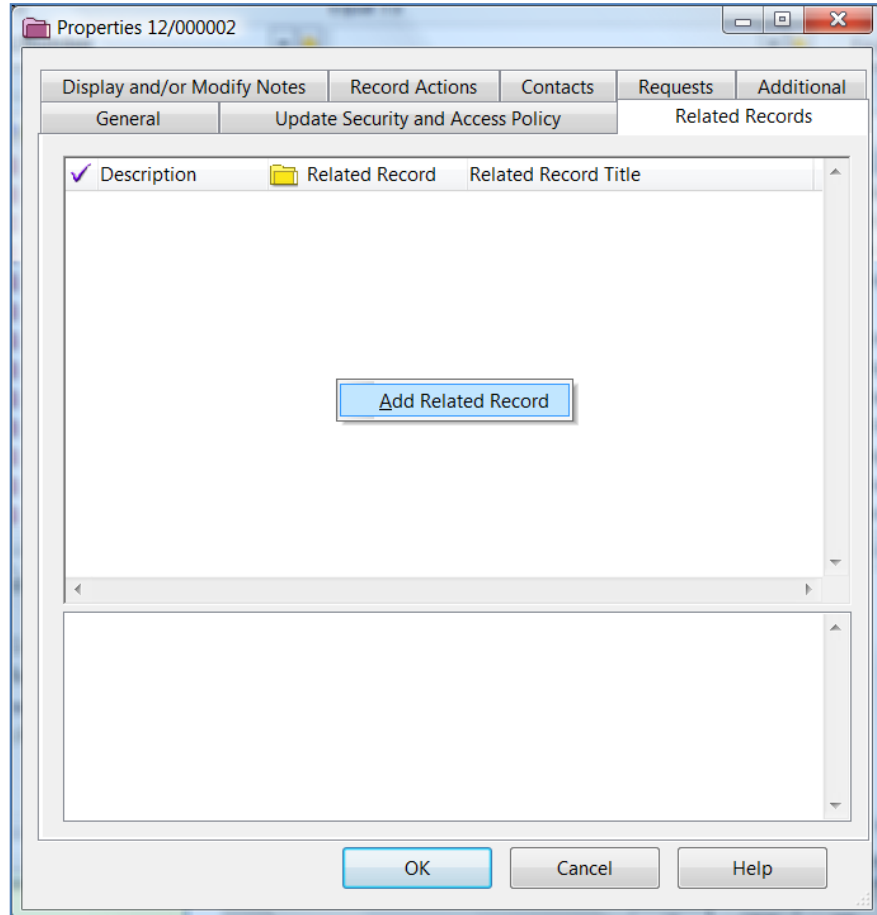


The screenshot shows the HP TRIM application window. The main pane displays a list of records with columns for Record Number and Title. Record 12/000002 is selected. A context menu is open over this record, with the 'Properties' option highlighted. The status bar at the bottom indicates 'Display properties of the selected Record'.

Select the tab:
**Related
Records**

Right-click
anywhere in the
white space

Select:
**Add Related
Record**



In the field
**Relationship
Type**

Select:
Related to

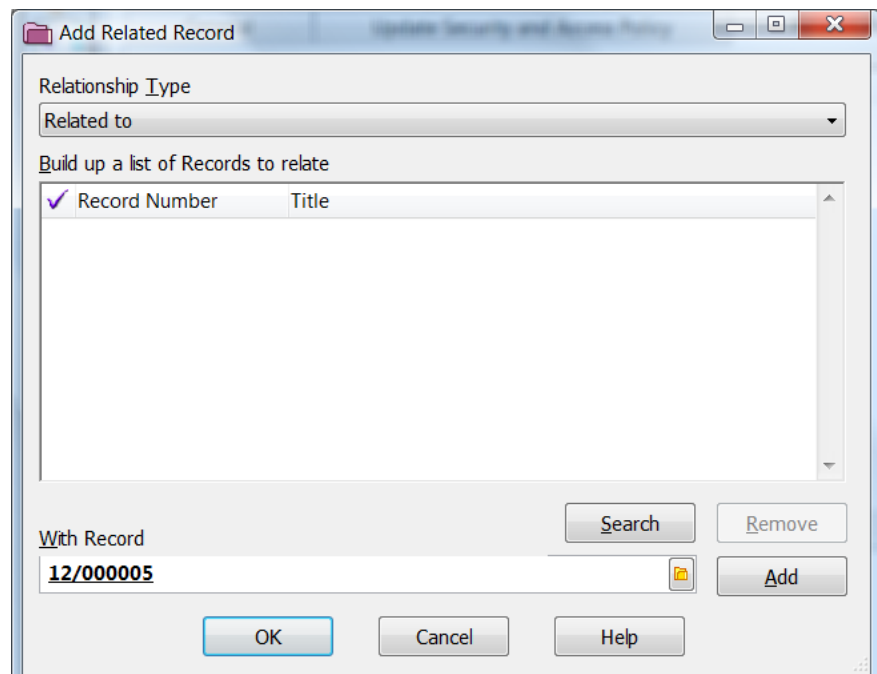
In the field
With Record

Type:
**the related
file number**

OR

Click:
**Quick Select
Button**

To search for the
file



The **Related Record** has been added

Click:
OK

to finalise

