

WESTERN SYDNEY UNIVERSITY



TRIM: Web Tool

Accessing TRIM Records through the Web

The TRIM web tool is primarily aimed at providing access to records in the TRIM system. While it is possible to place records into TRIM or amend records already in TRIM using this tool that functionality is recommended for advanced users only.

Browsers

While the TRIM web tool should work on most internet browsers (including Firefox and Google Chrome) it works best on Internet Explorer. The application will work with Macs.

Warning – Download Limits

Keep in mind that opening a document is the same as downloading it. A large document may be slow to download due to your internet connection and may impact on your download limits.

Web Address

The TRIM web tool can be accessed at:

<https://trim.westernsydney.edu.au/HPTRIMWebClient/>

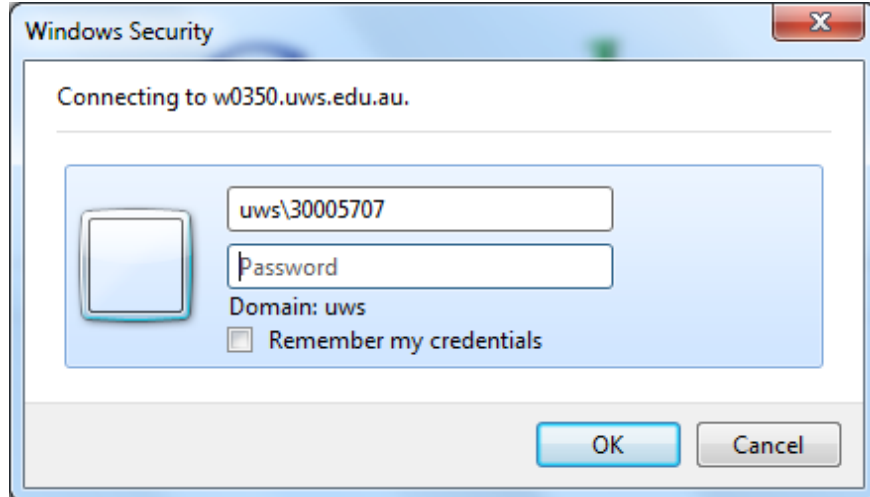
Logging In

If you are connecting from a computer that is not logged into the University network you will need to log in using your University staff ID and password. This is via a secure link.

Important note: You need to type **uws** in front of your staff ID as shown below.

Open the TRIM Web Tool

If you are connecting from a computer not logged into the University network this window will pop up.

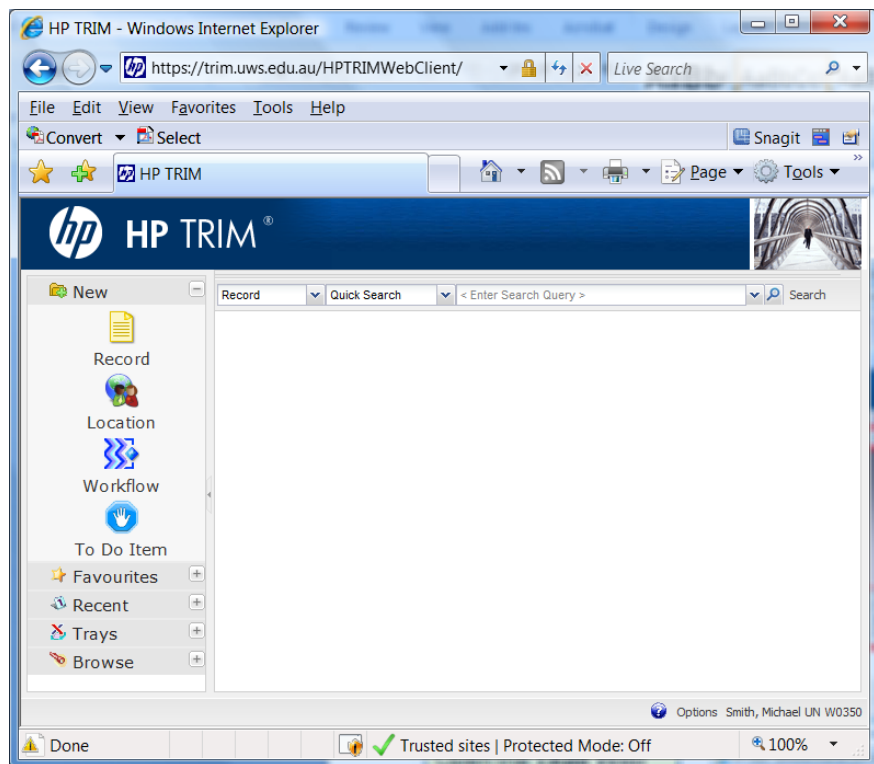


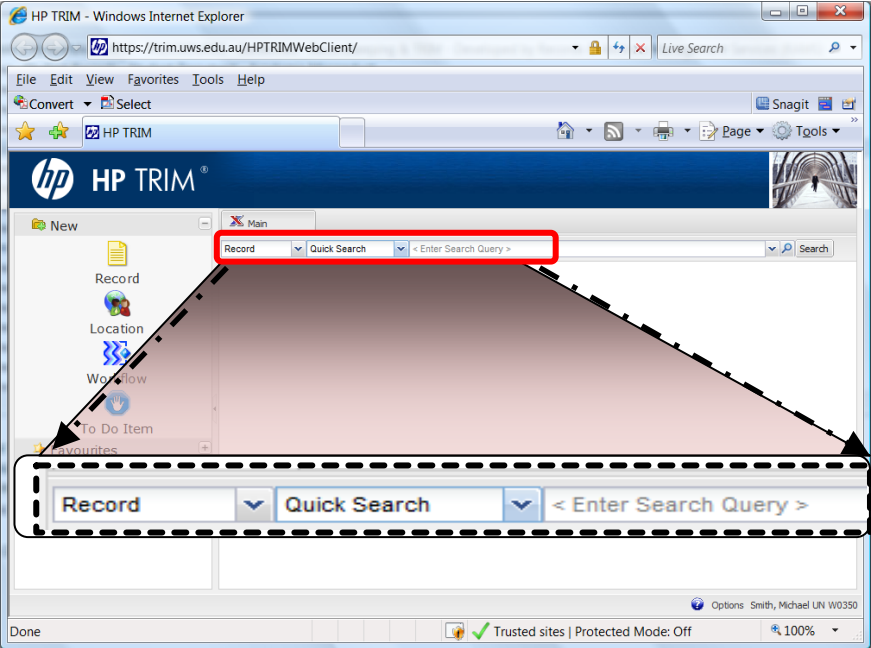
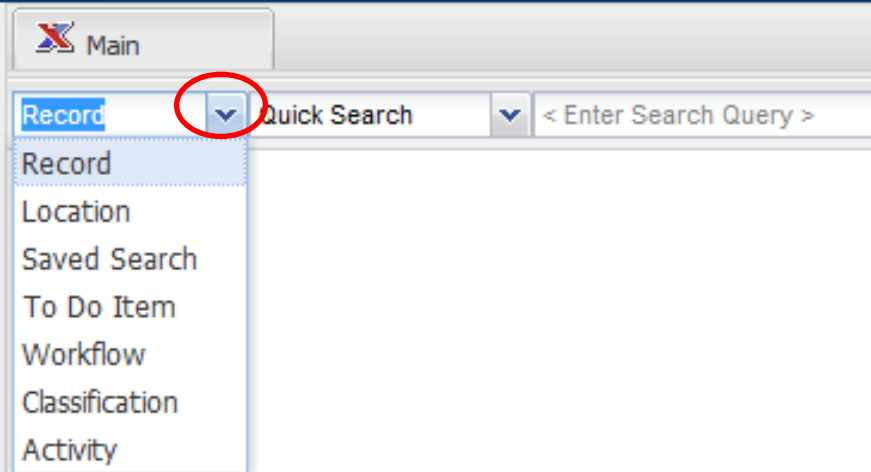
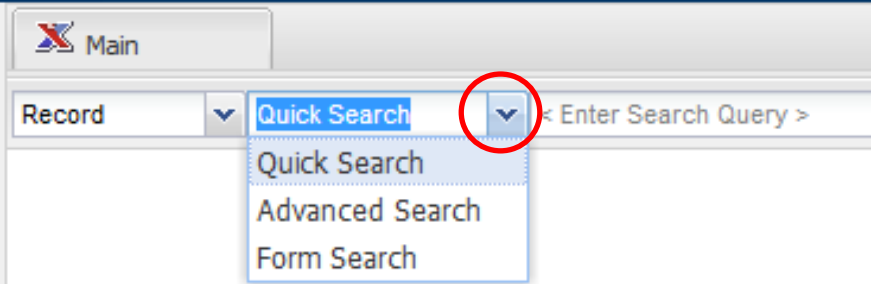
Simple Search

This search will include the *Title*, *Notes* and *Record Number* fields. It does not search for document content. For document content use the *Form Search* option (covered later in this document).

Open the TRIM Web Tool

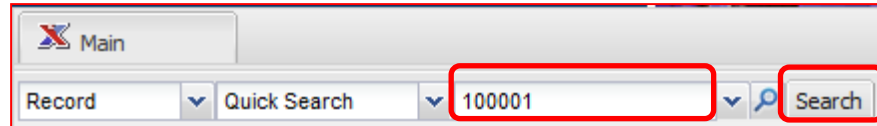
The default should look like the image to the right.



<p>Search area shown to the right.</p>	
<p>If not already shown choose the following settings. Select: Record</p>	
<p>Select: Quick Search</p>	

Type your search term where it says *<Enter Search Query>*

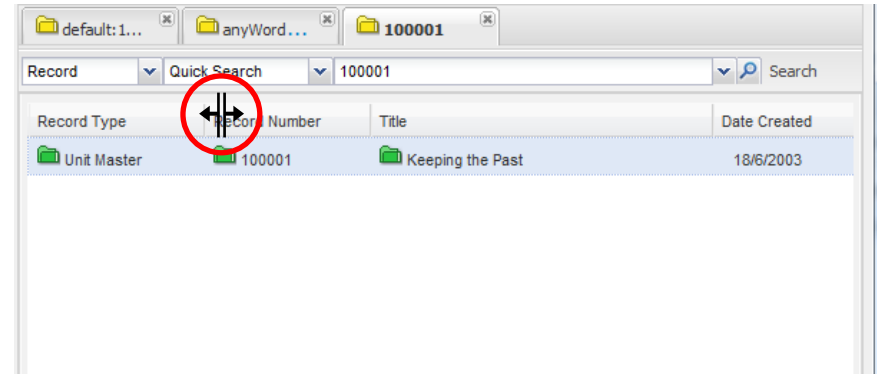
Click: *Search*



Note: If you type a student ID the system will search for the record number (ie the official student file) and WILL NOT search any further. To locate any records with the ID in the title or notes fields use the *Form Search* options.

Viewing the Results

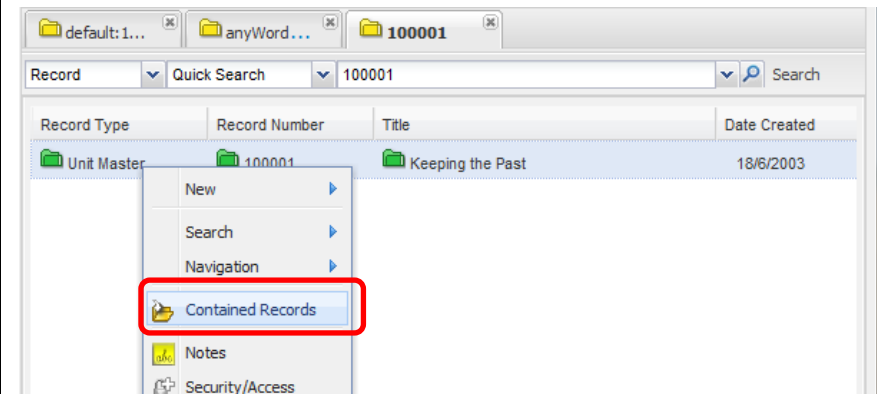
You can adjust the width of the columns by clicking and dragging between the column headings.



Navigating to the contents of a folder

Right click on a folder

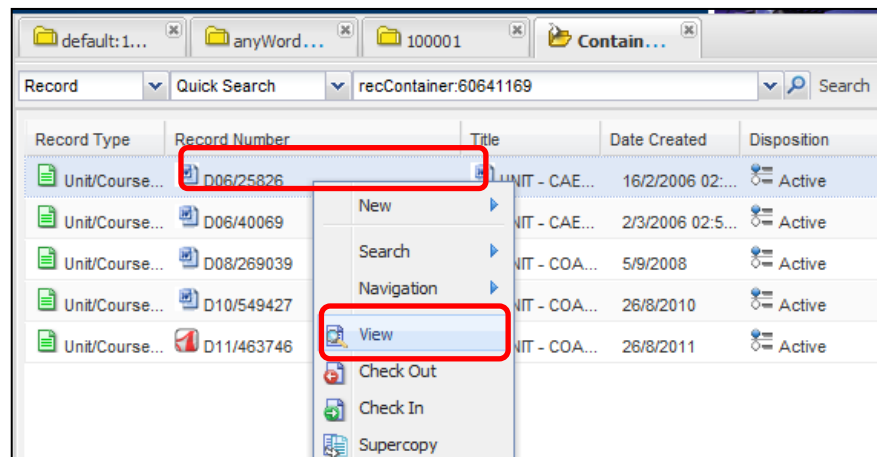
Select: *Contained Records*



Opening a Document

Right click
on the
Document

Select:
View

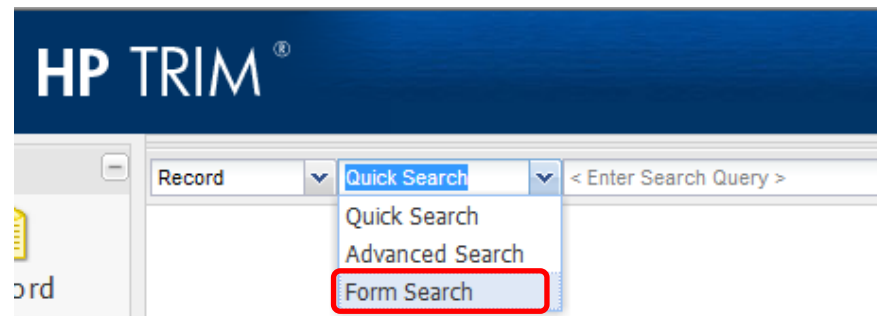


Controlled Searching

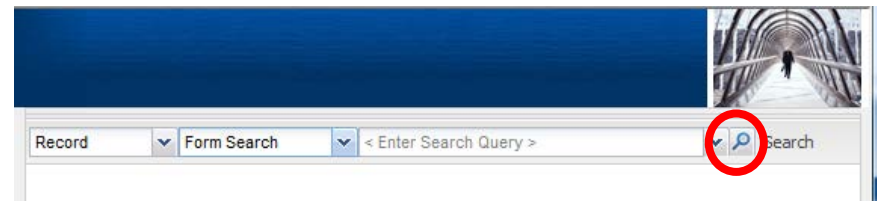
The **Form Search** is the easiest search option if you want to search on a number of criteria at the same time and/or filter the results. This search option will also allow you to conduct a document content search (note that content searches may take longer).

Open the
TRIM Web
Tool

Select:
**Form
Search**



Click the
icon:



To add a search term:

Type your search term in the appropriate box

Note: You can only enter one search term at a time. If you type multiple terms the system will search for the exact phrase only.

Record Form Search

Search Sort Filter

Title: test

Notes:

Content:

Contact:

Assignee:

Container:

External ID:

Date Created: TO:

Date Registered: TO:

Owner Location:

Record Type:

Expanded Number:

Search Cancel

Results ...

You can then navigate to contents or view electronic documents by right clicking on a record.

hp HP TRIM

New

Record

Location

Workflow

To Do Item

Favourites

Recent

Trays

Browse

Record Form Search title:"te..."

Record Type Record Number Title Date Created

Record Type	Record Number	Title	Date Created
Student - File	90910559	Student, Test No.01	21/2/2008 01:22 PM
Student - File	16657553	test error,	5/9/2008
Student - File	16657540	test,	5/9/2008
Student - File			/2011
Student - File			/2011

Results of your search are listed here

Page 1 of 1 Settings Displaying result 1 - 5 of 5

Record Number 90910559

Title Student, Test No.01

Date Created Thursday, 21 February 2008 at 1:22 PM

Date Registered Thursday, 21 February 2008 at 1:23 PM

Assignee

Notes

All Holds

Information about the record you have selected is listed here

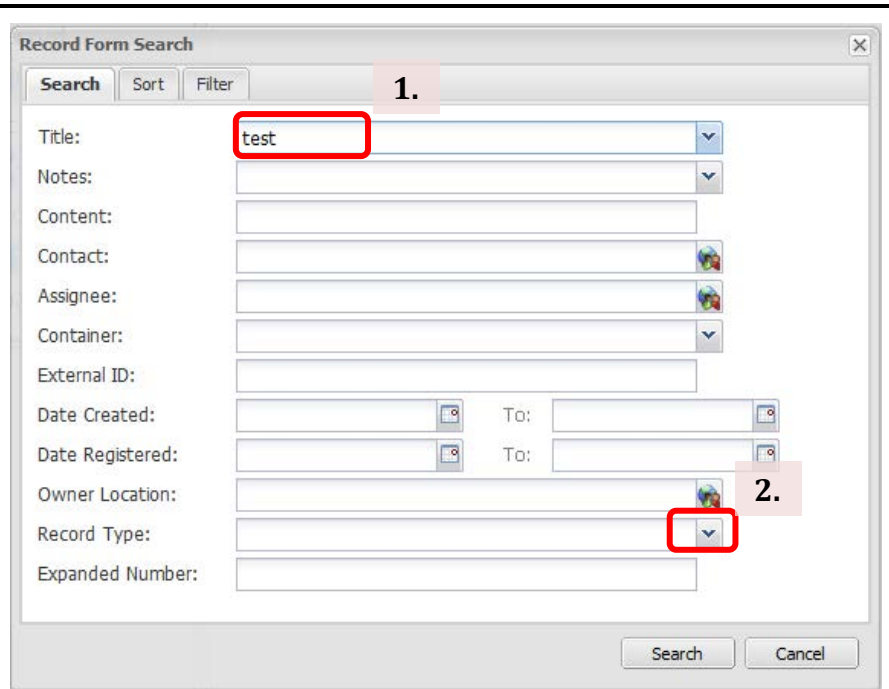
Properties Notes

Options Smith, Michael UN W0350

Done Trusted sites | Protected Mode: Off 100%

Filtering Results

To narrow the search to particular *record types* click the button beside the **Record Type** box:



The **Record Form Search** dialog box has tabs for **Search**, **Sort**, and **Filter**. The **Search** tab is active. A red box labeled **1.** highlights the **Title** input field containing the text "test". Another red box labeled **2.** highlights the **Record Type** dropdown menu.

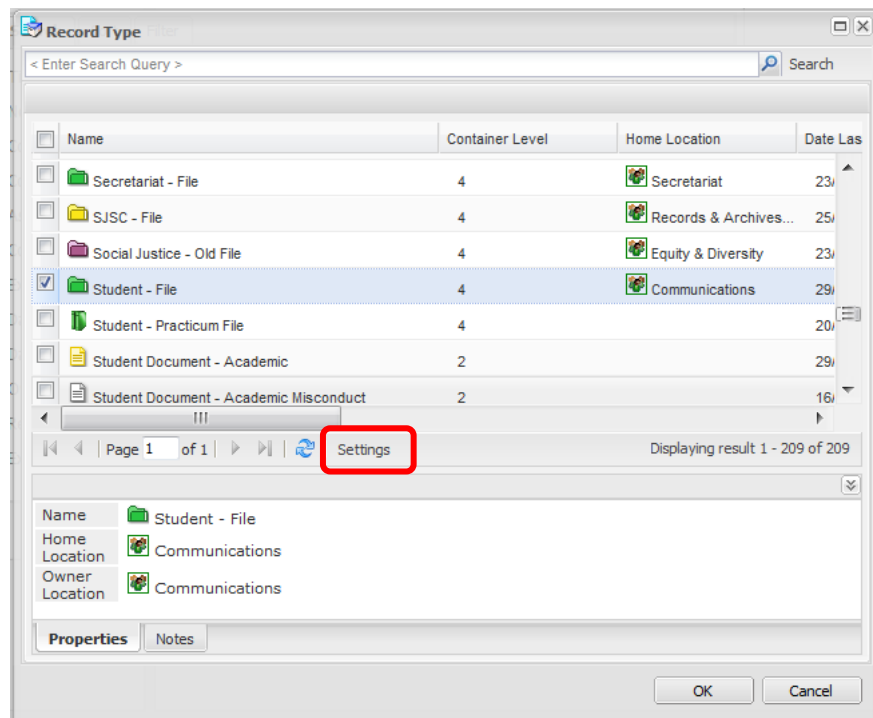
To view a list of all record types click:

Settings

Change the setting to **250**. Place a tick in the box of all record types you want to include.

Click: **OK**

Note: Even though you can see all record types in the system you will still only be able to view records for which you have access permissions.



The **Record Type** dialog box shows a list of record types. A red box labeled **Settings** highlights the **Settings** button at the bottom of the list. Below the list, the properties for the selected record type "Student - File" are shown: Name: Student - File, Home Location: Communications, and Owner Location: Communications.

Name	Container Level	Home Location	Date Las
Secretariat - File	4	Secretariat	23/
SJSC - File	4	Records & Archives...	25/
Social Justice - Old File	4	Equity & Diversity	23/
<input checked="" type="checkbox"/> Student - File	4	Communications	29/
Student - Practicum File	4		20/
Student Document - Academic	2		29/
Student Document - Academic Misconduct	2		16/

Click:
Search

The screenshot shows the 'Record Form Search' dialog box with the 'Search' tab selected. The 'Title' field contains the text 'test'. The 'Search' button at the bottom right is highlighted with a red rectangle. The dialog box includes fields for Title, Notes, Content, Contact, Assignee, Container, External ID, Date Created, Date Registered, Owner Location, Record Type, and Expanded Number. The Record Type is set to '"Academic Misconduct - File", "Student - File"'. The date at the bottom left is '16 August 2007 at 2:54 PM'.

Sorting Results

Click on the
Sort tab

The screenshot shows the 'Record Form Search' dialog box with the 'Sort' tab selected. The 'Title' field contains the text 'test'. The 'Sort' tab is highlighted with a red rectangle. The dialog box includes fields for Title, Notes, Content, Contact, Assignee, Container, External ID, Date Created, Date Registered, Owner Location, Record Type, and Expanded Number. The Record Type is set to '"Academic Misconduct - File", "Student - File"'. The date at the bottom left is '16 August 2007 at 2:54 PM'.

Select the preferred sort option (in this example *Title (Free Text Part)*).

Click the Add button:



Click:
Search

Record Form Search

Search Sort Filter

Sort Clause	Help	Sort Clause	Direction
number	Sorts the results by Record Number.	typedTitle	ASC
numberx	Sorts the results by Expanded Number.		
originRun	Sorts the results by Originated From Run.		
partRule	Sorts the results by Automated Part Rule.		
priority	Sorts the results by Priority.		
publishedOn	Sorts the results by Date Published.		
registeredOn	Sorts the results by Date Registered.		
review	Sorts the results by Retention Review Date.		
schedule	Sorts the results by Retention Schedule.		
type	Sorts the results by Record Type.		
typedTitle	Sorts the results by Title (Free Text Part).		
updated	Sorts the results by Date Last Updated.		
uri	Sorts the results by Unique Identifier.		

1. 2. 3.

Save as Default Sort Fields

Search Cancel

16 August 2007 at 2:54 PM