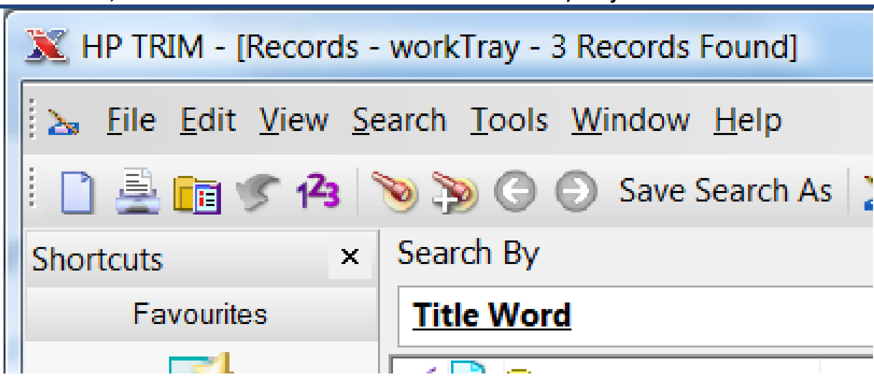
WESTERN SYDNEY
UNIVERSITY

TRIM:
Creating a File (folder)

Open TRIM

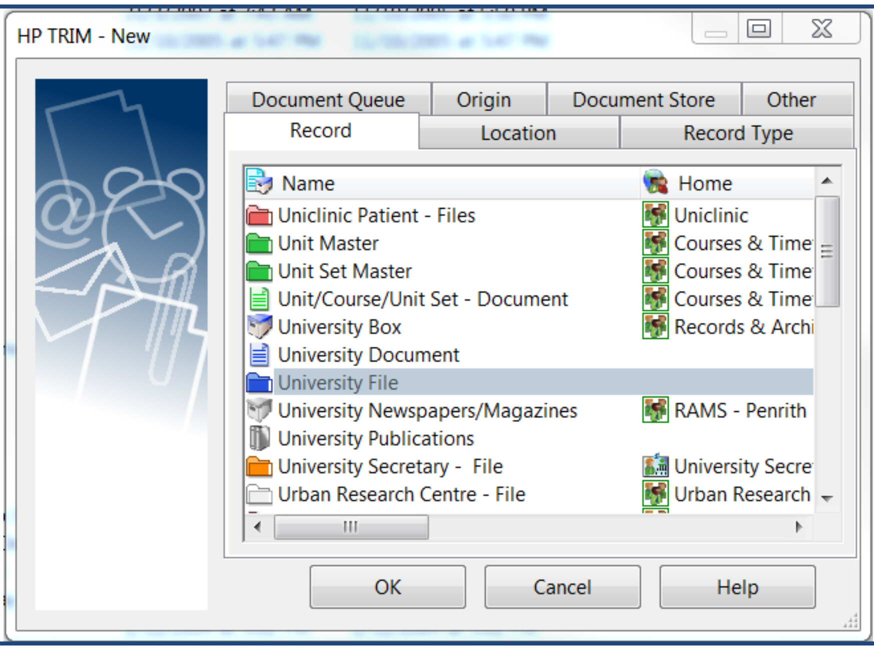
From the **File** menu, select **New…** OR Click the **New Record/object** icon



Select the *Record Type* for the file, based on who should have access to the information to be contained in the file.

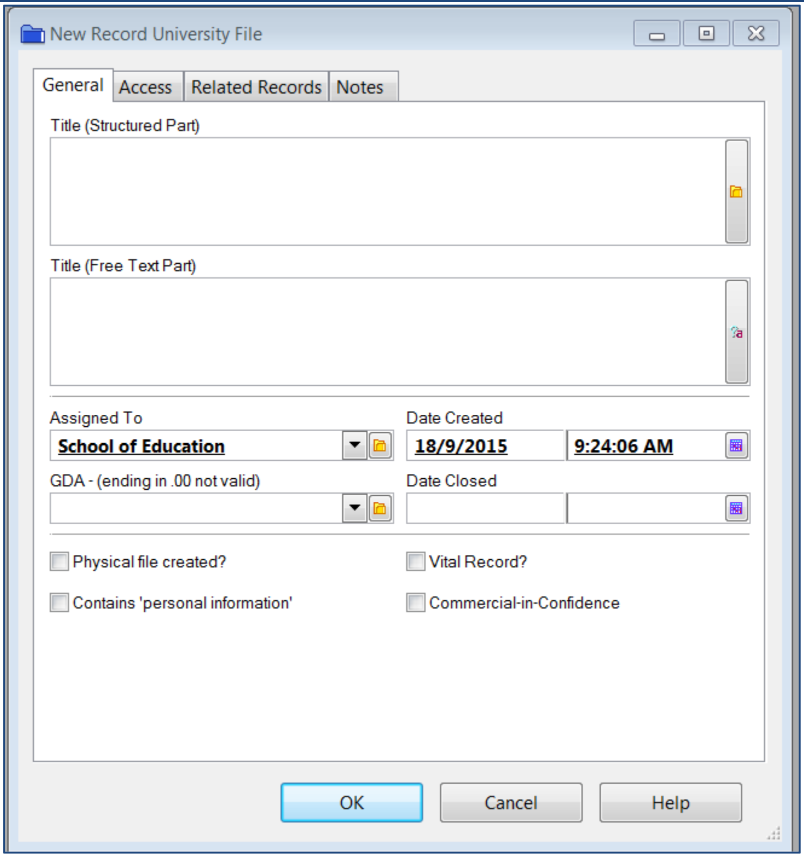
Staff within your own business unit – use your business unit File? *OR*
All staff of the University (or groups outside your own business unit) – use University File?

Specialised file types may be available if you are authorised to use them, eg, Misconduct File



General Tab

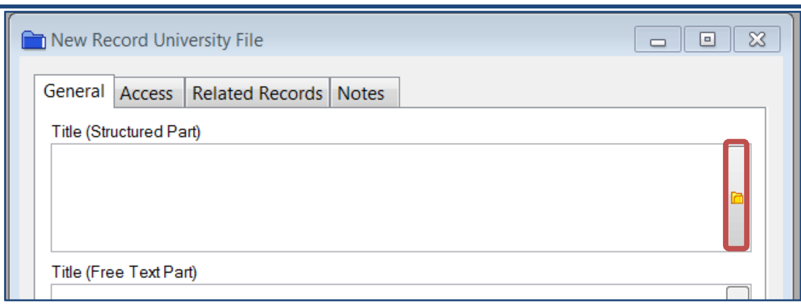
Refer to the **Records Information Form RIF** for assistance in completing the **Titling, Retention (GDA) and Access Restrictions** on the **New Record** form.

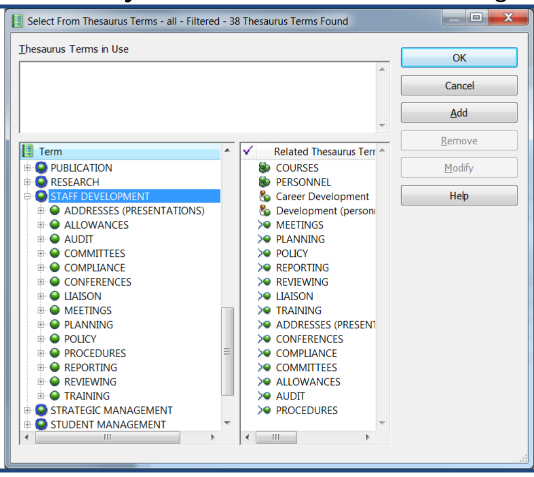
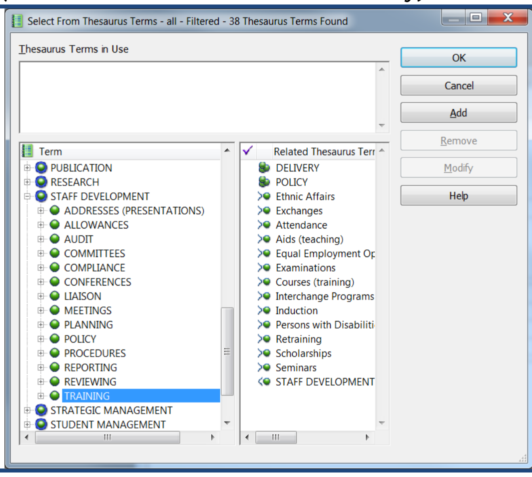


The **Title (Structured Part)** field must be made up of a **Keyword** and an **Activity** term from the keyword thesaurus built into TRIM.

Lower level **Subject Descriptors** may also be added, but are not mandatory.

Click the search button to choose the **Keyword – Activity** terms that describe the information to be contained in this file.

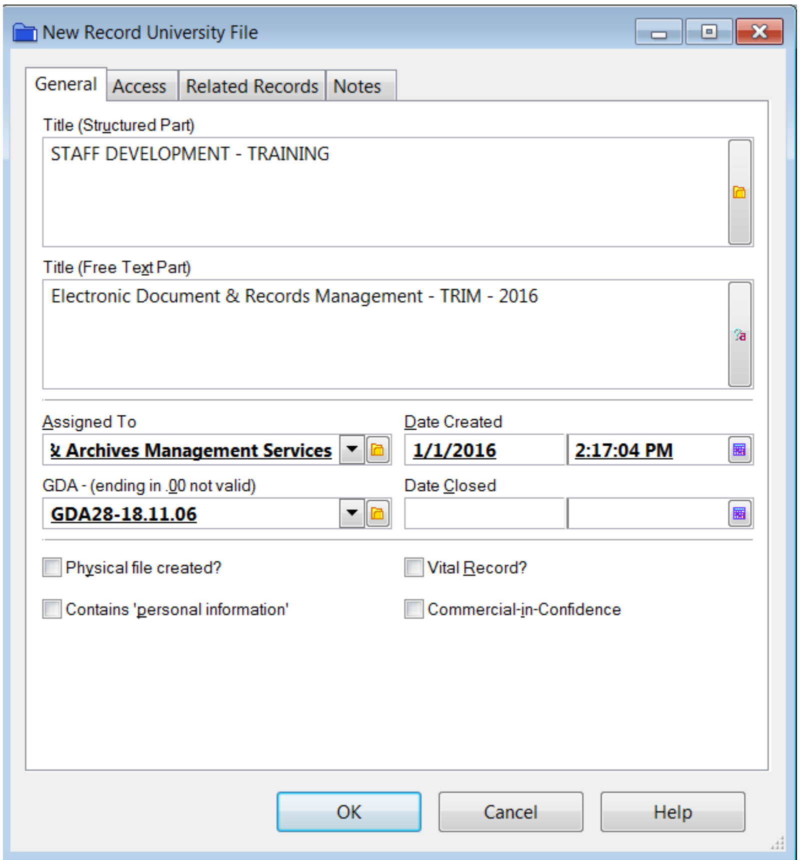


Title (Structured Part) Select a ***Keyword*** Thesaurus term click + sign	Select an ***Activity*** Thesaurus term *(Select lower level terms if necessary)*
 	

Double click the lowest level term *(or click the OK button)* to insert the title

Refer to the **RIF** to complete the following mandatory fields:

Title (Free Text Part) – GDA – Date Created *(date the information in the file commenced)*



Refer to the **RIF** to complete tick the boxes as appropriate:
Physical file created? Vital Record? Contains 'personal information' Commercial-in-Confidence

Do NOT click OK yet

Apply Access Control to a File

You are able to apply **Access Controls** to a file at various stages as follows:

- while completing the file registration at the Record Entry form through the Access tab;
- after the file has been registered, by either:
  - highlighting a file and clicking on the right mouse button and selecting *Details* – Security/Access, or
  - highlighting a file and clicking on the right mouse button and selecting Properties and then selecting the Access tab.

Access Tab

You may modify ***Access Controls*** for the following tasks (except Destroy Record):

View Document	allows a person to see the attached electronic document
View Metadata	allows a person to see the record's registered information *(that is, information about the record)*
Update Document	allows the Check In and Check Out of attached electronic documents for modification
Update Record Metadata	allows record information to be modified
Modify Record Access	allows modification of Security and Access Controls for the selected record
Destroy Record	the Destroy Record option is only available to RAMS staff
Contribute Contents	allows staff to contribute documents to the file but they may not even be permitted to see the file itself or any of its contents

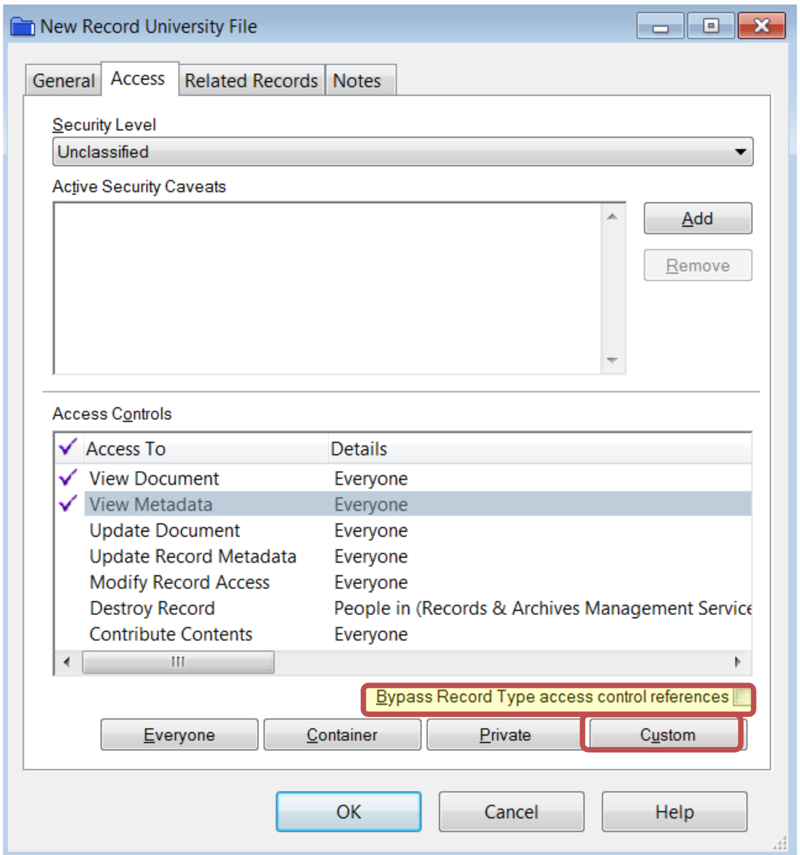
Once you select the tasks you wish to restrict, you have the following options for ***Access Controls***:

Everyone	Set the highlighted Access Control to Public (Everyone). This makes the selected control available to all users. No Access Control is applied to the item, or existing controls are deleted so that the item is made available to everyone. This means that all users with update permissions will be able to perform editing and updating functions.
Container	The document will inherit the Access Control properties of the file it is enclosed in. This is particularly useful for workgroups who only have access to a project folder.
Private	Set the function so it can only be performed by the currently logged on user. When you click Private, your user name will be placed in the Details field. If an Organisation is selected, then all persons within that organisation will have access to the record. If a Group is selected, then all persons who belong to that group will have access to the record.
Custom	Specify persons (staff), positions, groups or organisations who will have access to the task. When you click Custom, the Customise Access (Access Settings) dialog box will display

When you select either ***Everyone***, ***Container*** or ***Private*** you will instantly see the modification to the record. When you select the ***Custom*** option you will be required to go through the following process.

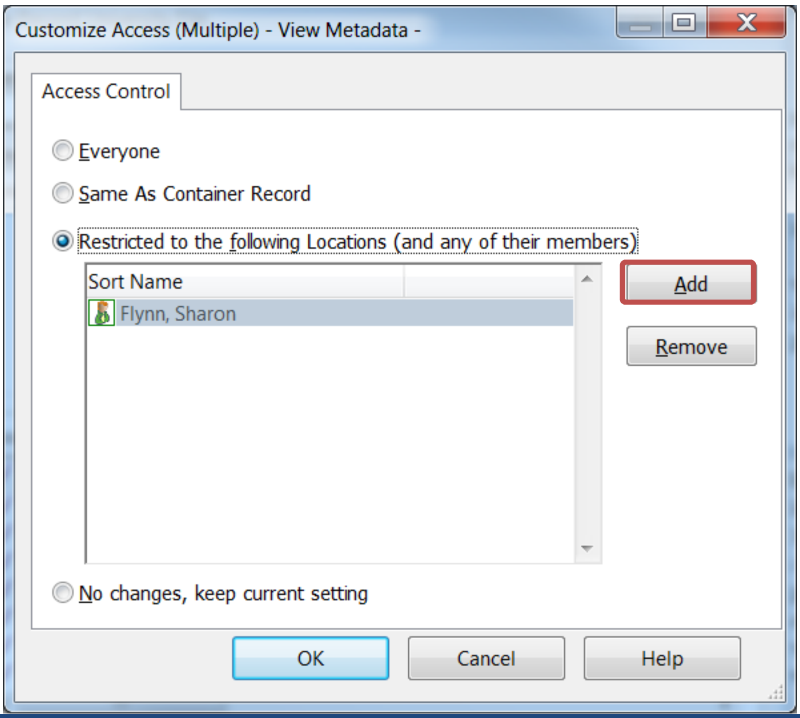
Select the ***Access Controls*** tasks that you wish to modify by tagging them.

Do this by left-clicking the mouse in the area to the 'left' of the ***Access Controls*** task.
Click: Custom



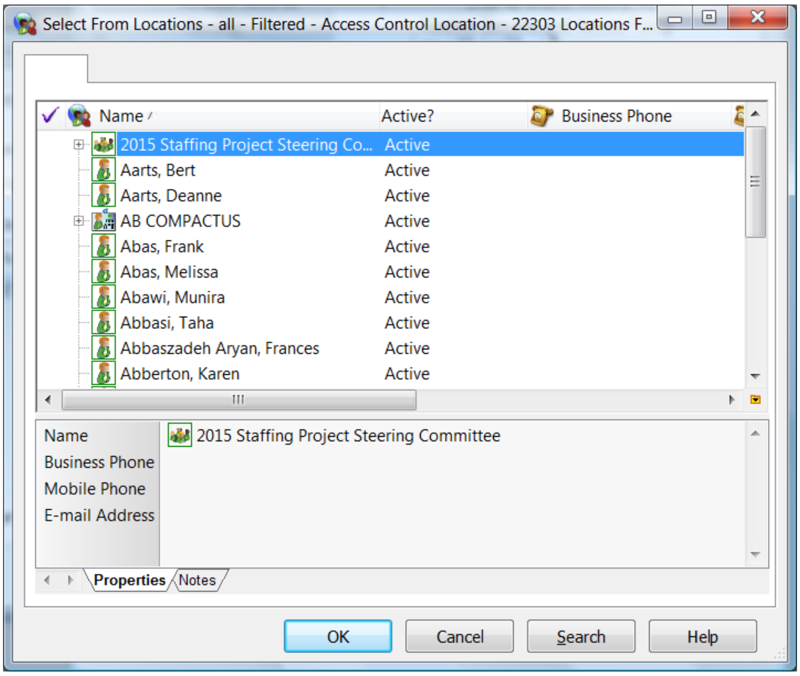
NOTE: When creating a business unit File, you should also tick the Bypass Record Type box.

Select: ***Restricted to the following locations***
Click: Add

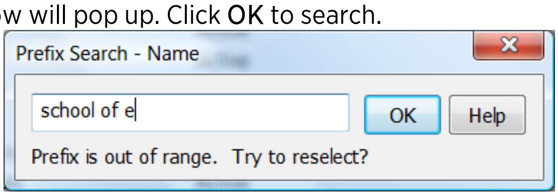


From the list of ***Locations*** (people, positions, groups) that appears, select the positions or groups that require access to the file.

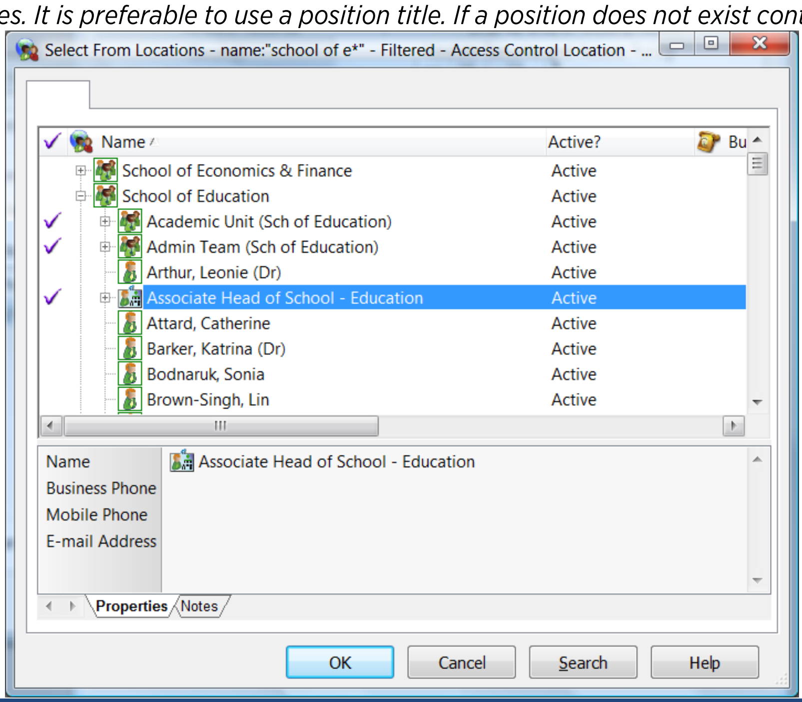
TIP – you do not need to scroll through the list. Begin typing the position or group name.



The Prefix Search window will pop up. Click **OK** to search.



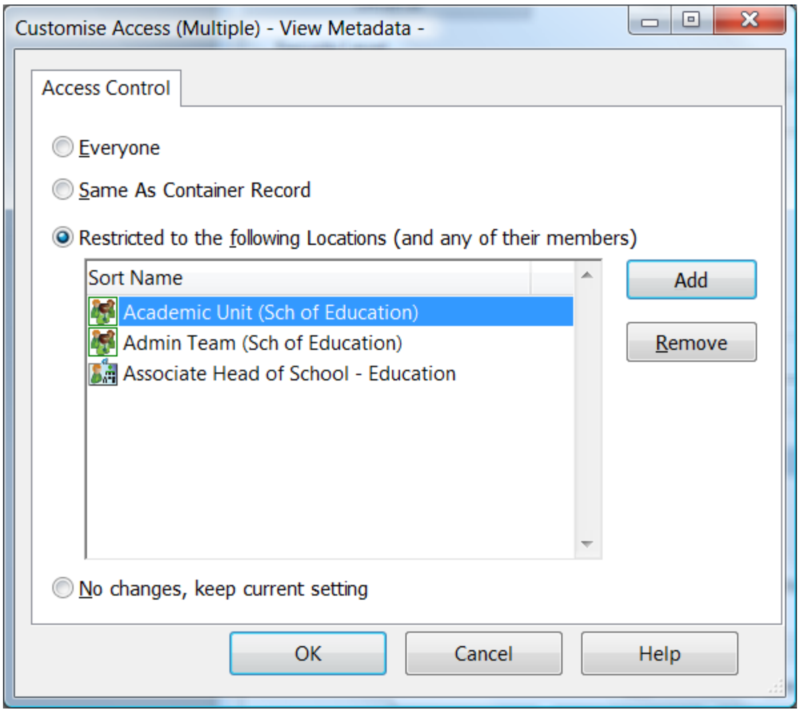
AVOID using individual staff names, as this makes it difficult to manage access when the staff member leaves. It is preferable to use a position title. If a position does not exist contact RAMS.



Remove your name.

Add as many positions or groups as required by clicking on the ***Add*** button.

Click: OK

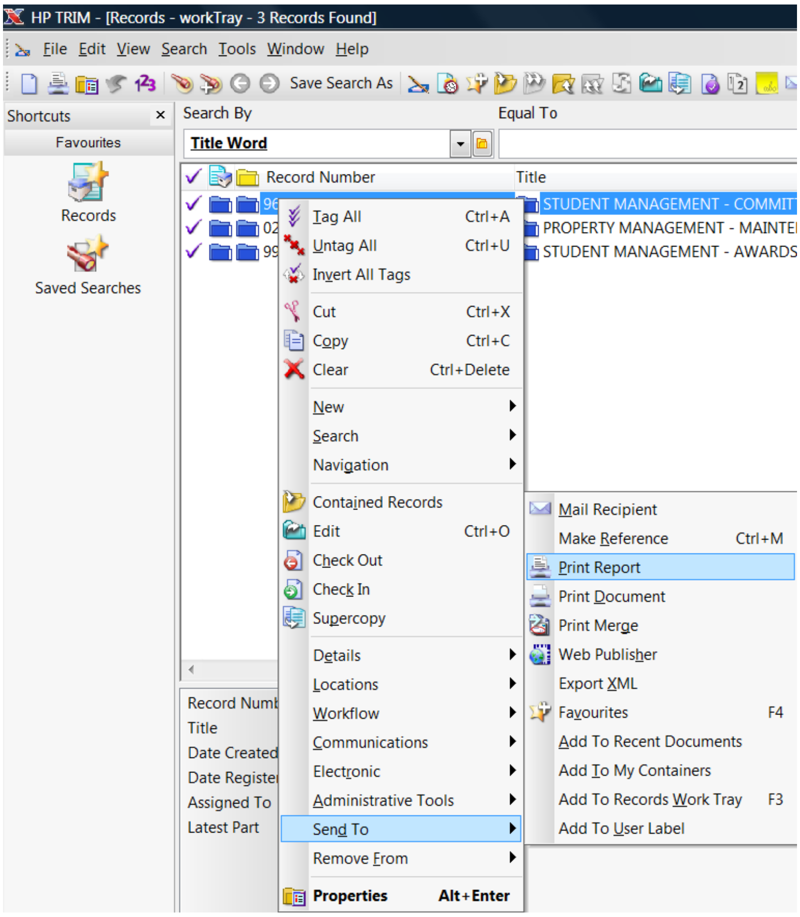


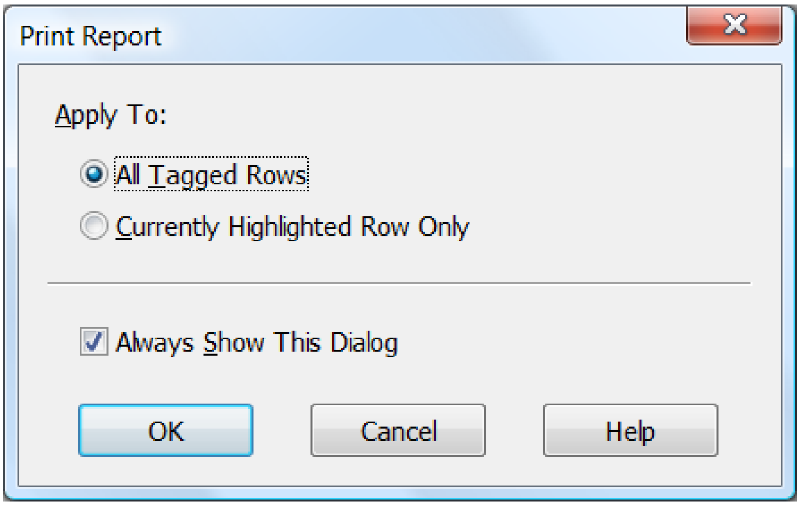
Now go back to the General tab and check that the file has been set up as you want it.

Click *OK* once all information has been entered.

Print File Label *(hard copy files only, labels available from RAMS)*

Find and tag the files for which you wish to print labels. Right click and select: **Send To > Print Report**

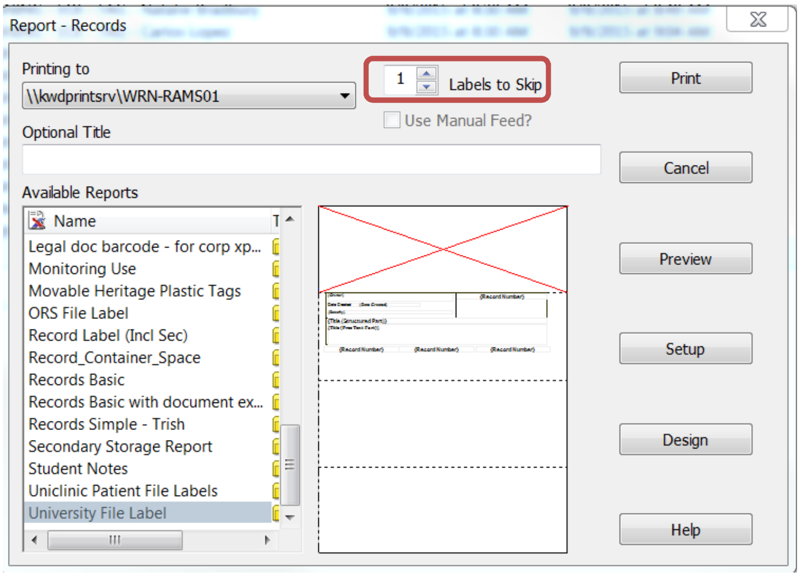




Click: OK

Select: Select: **University File Label**

Click: **Print** (Use the Labels to Skip field if you are printing on a partially used sheet of labels)



Complete the physical file as follows:

- Place the label on the front where indicated.
- Attach one barcode on the inside of the front cover where indicated.
- Place 'X' in any appropriate box on the front cover, and
- Attach coloured Year and File numbers along the bottom or opening edge of the file. *(You can even write the file title on the opening edge as shown below)*