

Save Higher Degree by Research (HDR) student documents in TRIM

Quality check

Prior to moving HDR student documents from shared drives to TRIM, review the following:

- Record title – Is it meaningful? As a minimum the following criteria must be applied: **Student Number Surname, First Name – Document Type** e.g. 3267888 Rodriguez, Carlos – Confirmation of Candidature (Milestone Review)
- Quality of scanned documents (Is it readable? Have all pages been scanned?)

Student documents can be moved from shared drives to TRIM using the following methods:

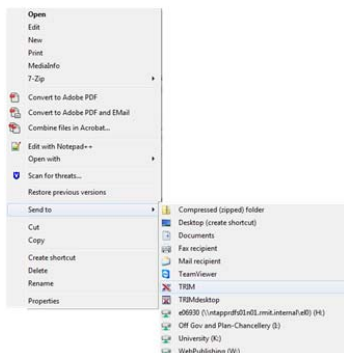
- Windows Send To
- Drag and drop

Using Windows Send To

To move documents to TRIM follow the steps below:

To move one document

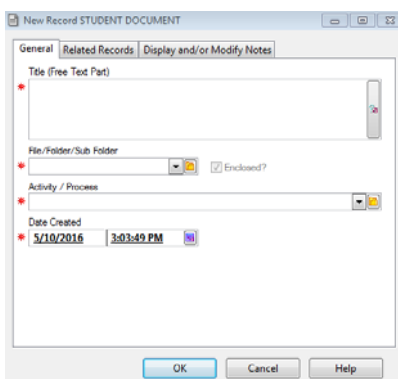
- Right Click on the document on the shared drive
- Click on **Send To > TRIM**



The **Select From Record Types** dialogue box will display

- Select **STUDENT DOCUMENT** and Click **OK**

The **New Record** form will display

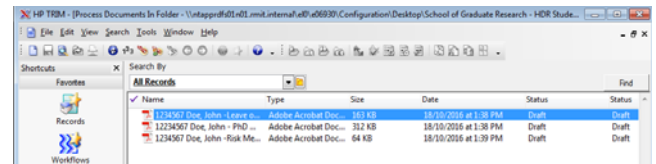


- Complete the relevant fields following data entry rules requirement associated for Student Document type
- Click **OK** to save the newly created record

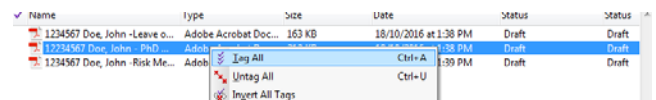
To move multiple documents

- From your shared drive, right click on selected records
- Click on **Send To > TRIM**

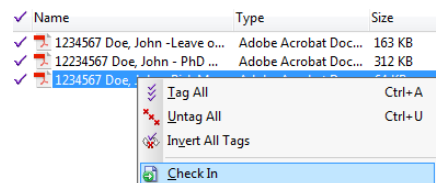
The **HP TRIM [Process Documents In Folder]** window will display



- Right Click on records on display and **Tag All**



- Right Click **Check In**




The **Select From Record Types** dialogue box will display

- Select **STUDENT DOCUMENT** and Click **OK**
- Complete the relevant fields
- Click **OK** to save the newly created record


Repeat steps 5, 6 and 7 for each record requiring **Check In**

Using drag and drop

- From **Windows Explorer** or your **Windows Desktop**, locate the document you want to save in TRIM
- Left-click on the document and drag it onto the TRIM icon  on the Windows taskbar at the bottom of the screen. If using this method, hold the mouse button down until TRIM maximises


3. Drag the document to the **TRIM View Pane** and release the mouse button to initiate the save process

The **Select From Record Types** dialogue box will display


4. Select  **STUDENT DOCUMENT** and Click **OK**

The **New Record** form will display

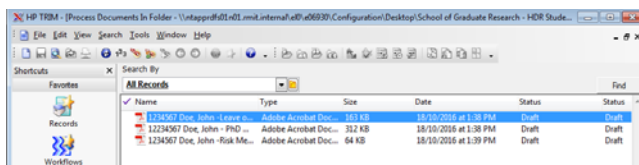
5. Complete the relevant fields following data entry rules requirement associated for Student Document type
6. Click **OK** to save the newly created record

 **Tip:** You can also **drag and drop** a single document directly onto a file/folder in the **TRIM List Pane**. To do this you must first highlight the file/folder.

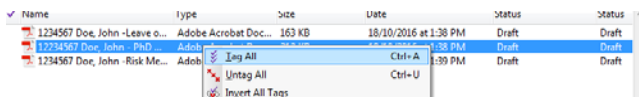
To move multiple documents

1. From your shared drive, right click on selected records
2. Left-click on the document and drag it onto the TRIM icon  on the Windows taskbar at the bottom of the screen. If using this method, hold the mouse button down until TRIM maximises
3. Drag the document to the **TRIM View Pane** and release the mouse button to initiate the save process

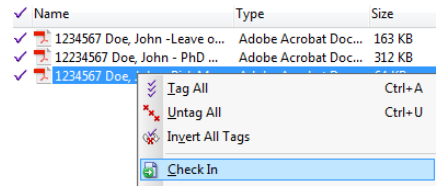
The **HP TRIM [Process Documents In Folder]** window will display




4. Right Click on records on display and **Tag All**



5. Right Click **Check In**



The **Select From Record Types** dialogue box will display

6. Select  **STUDENT DOCUMENT** and Click **OK**

7. Complete the relevant fields

8. Click **OK** to save the newly created record

Repeat steps **6, 7** and **8** for each record requiring **Check In**

Contact

Send an email to imhelp@mit.edu.au