

About TRIM – RMIT University

What is TRIM?



TRIM is RMIT's electronic document and records management system. It is used to capture RMIT Records. TRIM is used to manage both physical and electronic records and files.

It allows users to:

- Capture, register and classify records
- Assign retention period to records to facilitate the identification of records due for destruction or no longer required administratively and legally or when records should be sent to RMIT archives
- Search for and access electronic documents and associated information
- Apply access and security to documents

Why use TRIM?

The **advantages** of using TRIM to manage electronic documents are:

- Multiple users can access and use information quickly and efficiently utilising TRIM's powerful searching capabilities
- Information sharing and collaboration is better facilitated
- The need for duplicate paper and electronic documents is significantly reduced therefore making effective use of physical and server storage space
- Documents are less likely to be lost or misplaced
- Version control of documents can be maintained
- A complete audit trail of document usage is maintained (e.g. who has viewed or modified the document over time)
- Assists RMIT in meeting its legal obligations for Records Management
- Records vital to ongoing RMIT business practices have been captured in the event of a disaster

What can I TRIM?

TRIM document examples

Examples of RMIT records that **must be** registered in TRIM include (but are not limited to) the following document types:

- Policies
- Procedures
- Contracts / Agreements (TRIM is the VCE approved central repository of electronic versions of signed contracts)
- Budget and Financial Records
- Committee Meeting Minutes, Agenda and Papers
- Major works planning
- Business Planning
- Complaints
- Significant Purchases
- Legal Obligations
- Internal Reports
- Human Resource documents
- Formal communications between staff (i.e. official RMIT business).

Documents NOT requiring registration in TRIM

The following types of documents **do not** require registration in TRIM:



- Draft documents circulated via the email network for comment
- Copies or extracts of documents sent or kept for reference of information
- Working papers
- Announcements of social events
- External Promotional Material (Junk Mail)
- Records stored in approved University systems e.g. SAMS, SAP, etc
- Meeting bookings and applications
- Documents produced in a private / personal capacity (i.e. not official RMIT business)

TRIM document and container types

Container types

TRIM uses the concept of a hierarchy of **containers** where records are stored i.e. electronic records or information (metadata) about physical records are stored in a **container** which can be stored in a higher level **container** and so on. These **containers** are like **folders** in the general Windows environment.

The hierarchy of **containers** used at RMIT is as follows (ordered from highest to lowest level):

 FILE	all Document Types as well as Folders can be enclosed within a File
 FOLDER	all Document Types can be enclosed within a Folder

Document types

There are six standard TRIM Document Types used by RMIT. The use of each document type is explained below:



RMIT INTERNAL DOCUMENT

Used for documents created & maintained by an RMIT staff member for internal RMIT use (e.g. HR documents, Travel Authority, MasterCard Statements, Strategic / Business Plans, etc) or memoranda / correspondence sent from one RMIT staff member to another



EXTERNAL – INCOMING DOCUMENT

Used for documents received by RMIT from an external source (e.g. Government Department, another University, RMIT Student, member of the public)



EXTERNAL – OUTGOING DOCUMENT

Used for documents created by RMIT and sent to an external source (e.g. Government Department, another University, RMIT Student, member of the public)

HR PERSONNEL DOCUMENT

Used for all personnel documents created by RMIT Human Resources (HR) business unit ONLY (e.g. Personal Details, Superannuation Details, Contract of Employment)

RMIT POLICY / PROCEDURE

Used for all RMIT Internal Policies and Procedures









AGREEMENTS AND CONTRACTS

Used for all contracts and agreements irrespective of type. Do not use for Tenders, Expression of Interests, Memoranda, Letters between Contract Partners, Proposals or other documentation that may be related to a contract or agreement but is not the legal signed contract / agreement

Numbering of Container and Document Records

When a new record for a container or document is created in TRIM, the system automatically generates a **record number** consistent with a set of pre-determined rules within TRIM. TRIM applies these rules so that the first part of the record number identifies the container or document type. It then inserts the four digits of the year when the record was created. This is followed by a consecutive number for that container / record type for the year of creation. This number starts from one for each year of creation.

Examples of the record number for each **container / document** type are:

 FILE	FIL/2015/00256
 FOLDER	FOL/2015/00034
 RMIT INTERNAL DOCUMENT	INT/2015/17658
 EXTERNAL – INCOMING DOCUMENT	INC/2015/05678
 EXTERNAL – OUTGOING DOCUMENT	OUT/2015/08176
 HR PERSONNEL DOCUMENT	HR/2015/00124
 RMIT POLICY / PROCEDURE	POL/2015/00346
 AGREEMENTS AND CONTRACTS	CON/2015/01365

Locations in TRIM

Locations in TRIM are used to maintain the historical integrity of RMIT's records by recording information about who created, maintained and used records throughout the lifetime.






Locations can be assigned as the Home for a particular container, an author or addressee for particular documents or the responsible person for a document.

Locations are categorised into various types:

- **Green Locations** are RMIT internal locations
- **Red Locations** are External Locations (i.e. Non RMIT locations).




How to Identify Internal Locations:


The common **Internal** locations used at RMIT are:

 Person (Internal)	RMIT Internal Staff Member
 Positions (Internal)	Internal Jobs and Positions
 Organisations (Internal)	RMIT's Internal workgroups including: portfolios, schools and service areas
 Groups	Groups are created to be applied as part of access control for containers and documents and will comprise the relevant RMIT Internal Staff with TRIM licences
 Committee (Internal)	RMIT Committee or Board

How to Identify External Locations:

The common **External** locations used at RMIT are:

 Person (External)	External Person / Contact
 Organisations (External)	External Organisations e.g. Other Education Institutions, Government Departments, Private Companies / Organisations
 Committee (External)	External Committee

 **Note:** All internal Locations (i.e. Internal People, Positions, Organisations, Groups and Committees) are managed by Information Management and the structure of the internal locations, other than groups, should map to RMIT's organisational structure

Contact

Send an email to imhelp@rmit.edu.au