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)
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** 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**
- **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**
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