Subject: Placing Documents into TRIM from the Document Queue

TRIM Reference: INT04/2865

Commencement Date: 21 May 2004

Last Modified: 20 September 2012

Review Date: 20 September 2014

A document queue can be created from any folder on your share/personal drive directory or email folder. This provides a direct link from your directory/email folder to a folder in TRIM. There are multiple uses for document queues, please contact your TRIM Liaison Officer for further clarification. One example is that items may be placed into a document queue and be processed by a nominated officer. It is recommended that to reduce the risk of duplication, documents are either deleted out of the directory folder on saving into TRIM or checked back out to the directory if they are to require further editing.

You cannot set up document queues from TRIM Desktop, you must use TRIM Context only. You may set up as many queues as you require. (See the TRIM help file for more information.)

For manual processing:

1. Go to Tools – Record – Document Queues and select the queue you require. (You may also select from your Shortcut Bar > Favourites)
2. Right click and select Process, a list of the documents awaiting processing will be presented as shown in the example below.
3. To process documents right click and the select from the menu options as described below. (Note: you may catalogue individual documents one by one or you can Tag All and process them in a group)

Tip: Always check that the options for the queue are applicable to your needs (e.g. Dropped Files/Folders).

4. Once you select “Check In”, the following form will be presented.

5. Select OK.
6. The Record Type Entry Form will be presented (Refer to associated Record Entry Form cheat sheet for further clarification).
7. Repeat until all items in the queue have been processed.