Check in and Check back out to Local Directory

This option is used when staff members do not have access to TRIM and require electronic documents such as Word and Excel documents to be updated from the Directory.

Set the options as:

It is extremely important if you require processing document queues with as little intervention as possible that the above settings are selected. If documents are to be updated from the Directory and new revisions updated in TRIM, then it is crucial that the “Keep the local Document, and show it as ‘Checked Out’” is selected. It is also important that the “ignore ‘Original’ Documents” box is not
ticked, as otherwise it will not recognise that these documents are already in TRIM and it will try and register it again as a new document with the following filters:

![Image of file type filters]

**Document queue details:**

If manually placing documents from the document queue the following screen will be presented.

![Image of document queue screen]

Items placed into TRIM change from Draft to ‘Original’. If after placing in TRIM, the document is updated from the directory the status will change from ‘Original’ to ‘Modified’. When the modified document is checked in, the document will go into TRIM as a new revision (see INT06/3 reference below) and the status will change back to ‘Original’.

![Image of document queue changes]

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[www.utas.edu.au/it/records](http://www.utas.edu.au/it/records)
With the above options set the entry form will include information brought forward as shown below.

You will notice that the name is brought forward from the Summary Properties of the document and placed into the Title (Free Text Part), also the author is brought forward.

It was noted even with the option “Extract profiling information from new Documents” not selected, it still populated the Author field. (Refer to options set up as above). It must be noted that this option will automatically be overridden if the Context Administration System Option in the Record Tab “When Creating a New Record with an attached document - Suppress Automatic Profiling of the record from the document profile” is selected.

This automation of the Author field causes a potential issue in the TRIM locations table for duplication. It also has retrieval implications in that when searching for Authors, Addressees,
Contacts etc., as majority of users will not have any knowledge of how many variables there are for the one person. This issue is explained in the following example.

I am in the TRIM locations database as Fyfe, Cathy (Mrs). You will notice that in the Author field in the screen shot above, the entry of CFyfe has been automatically populated. I have also documents that have automatically populated VC Office and CMFyfe. Unless the user deletes this automatically created author and goes and selects Fyfe, Cathy (Mrs), there will be multiple names for the one person.

When a location (person’s name, email address) is placed into TRIM that is not already in the database it automatically creates an “Unknown” location. Unless a mechanism is created to deal with this, the database will quickly fill up with these entries.

From within TRIM the documents are placed in the folder.

Internal procedures would need to specify who was responsible for making the document final, making the document the official record.