

How to change errors in titles or files of student records

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Version control

Date	Version	Description	Author
January 2018	1	Creation of new info sheet for altering properties on student records in TRIM. Includes screenshots for thick client	Susannah Tindall
January 2019	1.1	Slight alterations of info sheet, including grammar and spelling. Updated to include screenshots for Web Client.	Susannah Tindall

Background

It is very common to discover minor errors after you have registered a document into TRIM.

The two most common errors are;

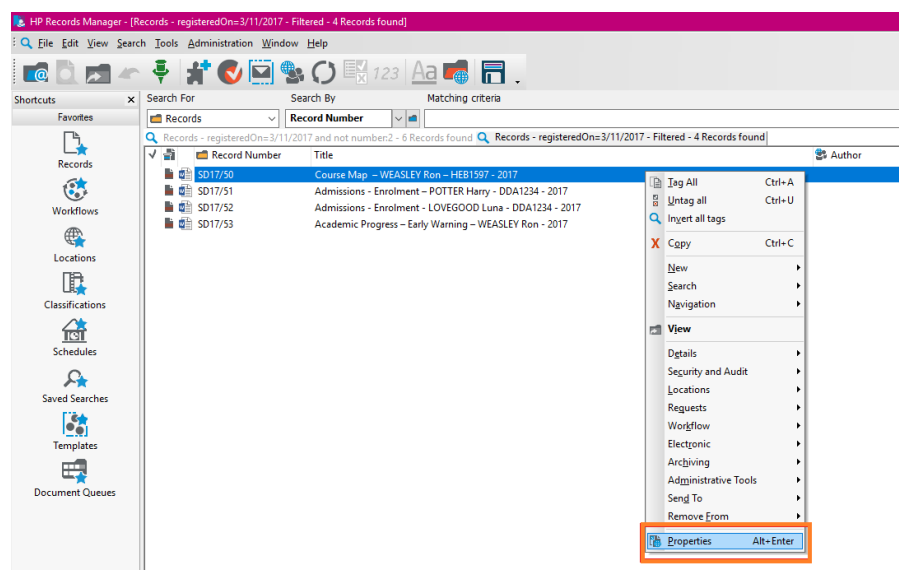
- 1) Registering a document to the wrong file.
- 2) Registering a document under the wrong title.

Both of these are easily fixed without the need to delete and re-register the record.

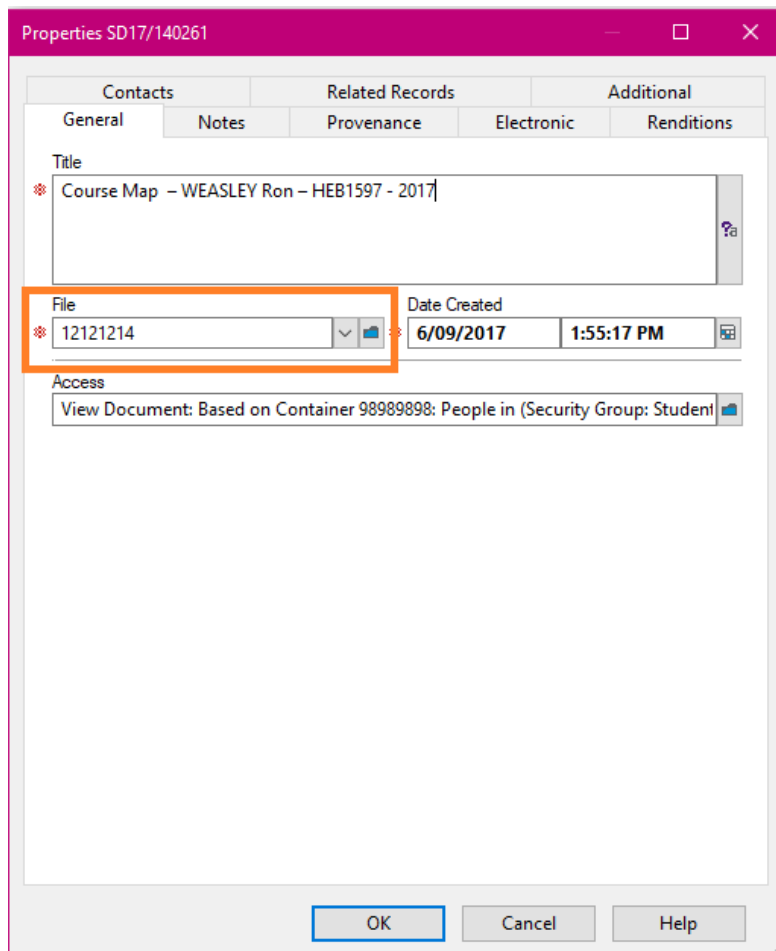
Registering a document to the wrong file (Desktop TRIM)

If you've correctly named a document, but placed it on the wrong student file, this is very easy to amend.

1. Right-click on the document and select 'Properties'.



2. The 'Properties' box will appear.
3. Highlight the 'File' number to delete it, and enter the correct student ID.



4. Select 'OK' to save and update the record.

Registering a file under the wrong name (Desktop TRIM)

If the file is correct, but the title of the document is wrong, this can also be corrected.

- a. Repeat the above steps, and alter 'Title'.
- b. Select 'OK' to save and update the record.

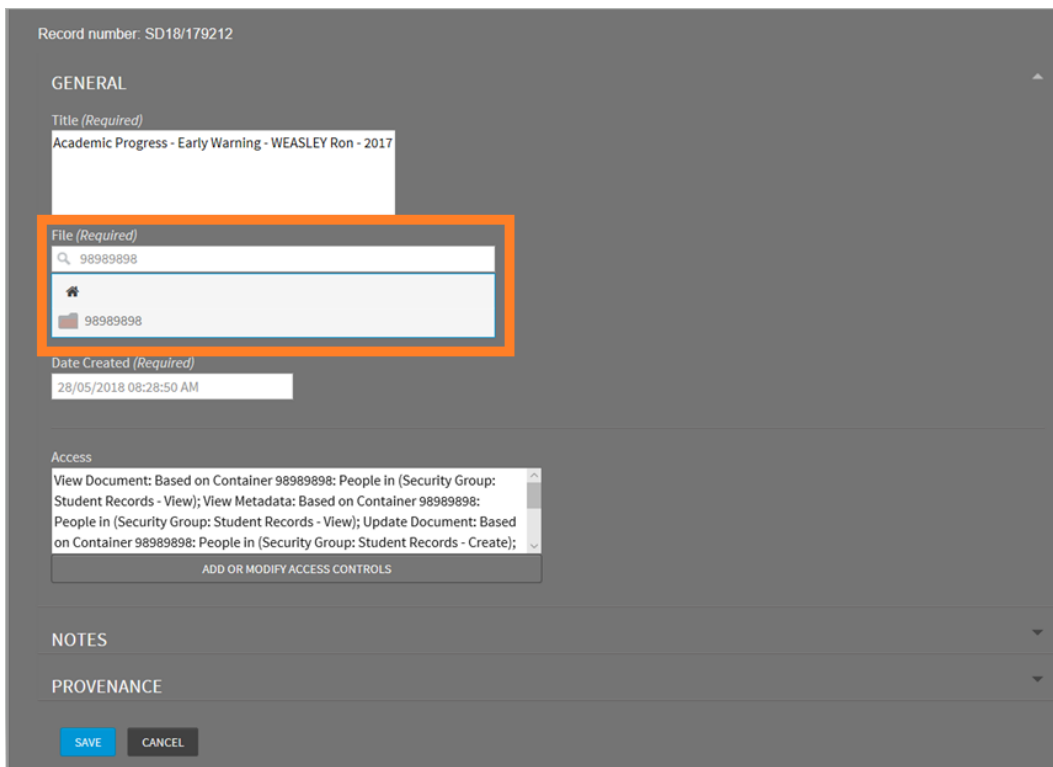
Registering a document to the wrong file (Web Client TRIM)

1. Select 'Update' on the document that needs amending.



The screenshot shows a document record in a web client. At the top, it says "STUDENT DOCUMENT" and "Academic Progress - Early Warning - WEASLEY Ron - 2017" with a record number "SD18/179212". Below this is a toolbar with an "UPDATE" button highlighted in orange, along with icons for a star, a trash can, a truck, and a "More" dropdown menu. On the left, there is a "PDF" icon. Below the toolbar, the "ASSIGNEE" is listed as "In Container '98989898 (At Home: Records Storage: Electronic)'" and the "DATE REGISTERED" is "12/12/2018 11:22 AM".

2. The 'Properties' box will appear.
3. Highlight the 'File' number to delete it, and enter the correct student ID.
4. Select 'Save' to update the record.



The screenshot shows a "Properties" dialog box for a document. At the top, it says "Record number: SD18/179212". The "GENERAL" section contains a "Title (Required)" field with the text "Academic Progress - Early Warning - WEASLEY Ron - 2017". Below it is a "File (Required)" field with a search icon and the text "98989898". A dropdown menu is open below the search field, showing a list of files with a trash icon and the text "98989898". Below the "File" field is a "Date Created (Required)" field with the text "28/05/2018 08:28:50 AM". The "Access" section contains a list of permissions: "View Document: Based on Container 98989898: People in (Security Group: Student Records - View); View Metadata: Based on Container 98989898: People in (Security Group: Student Records - View); Update Document: Based on Container 98989898: People in (Security Group: Student Records - Create);". Below the permissions list is a button that says "ADD OR MODIFY ACCESS CONTROLS". At the bottom of the dialog box, there are "NOTES" and "PROVENANCE" sections, and two buttons: "SAVE" and "CANCEL".

Registering a file under the wrong name (Web Client TRIM)

- a. Repeat the above steps, and alter 'Title'.
- b. Select 'Save' to update the record.

<<END OF PROCEDURE>>