

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;

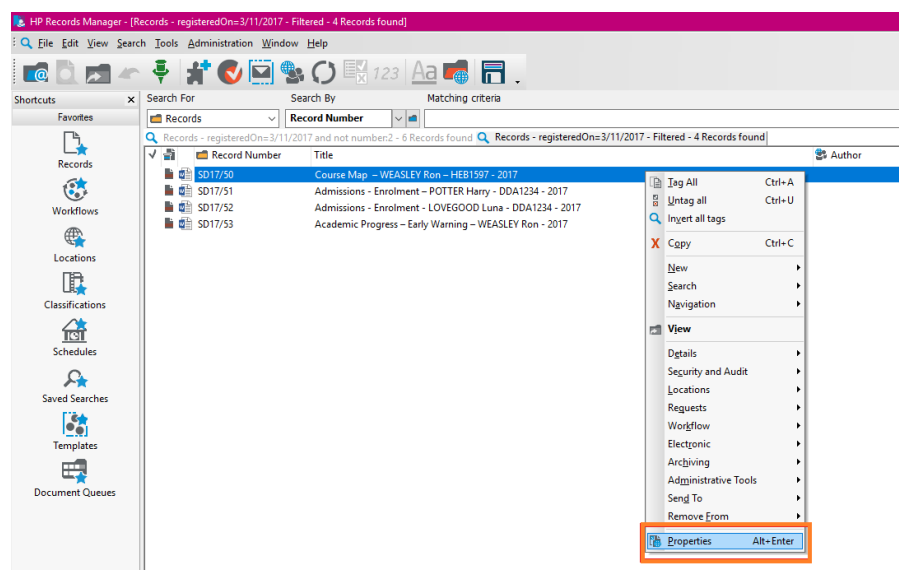
- 1) Registering a document to the wrong file.
- 2) Registering a document under the wrong title.

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

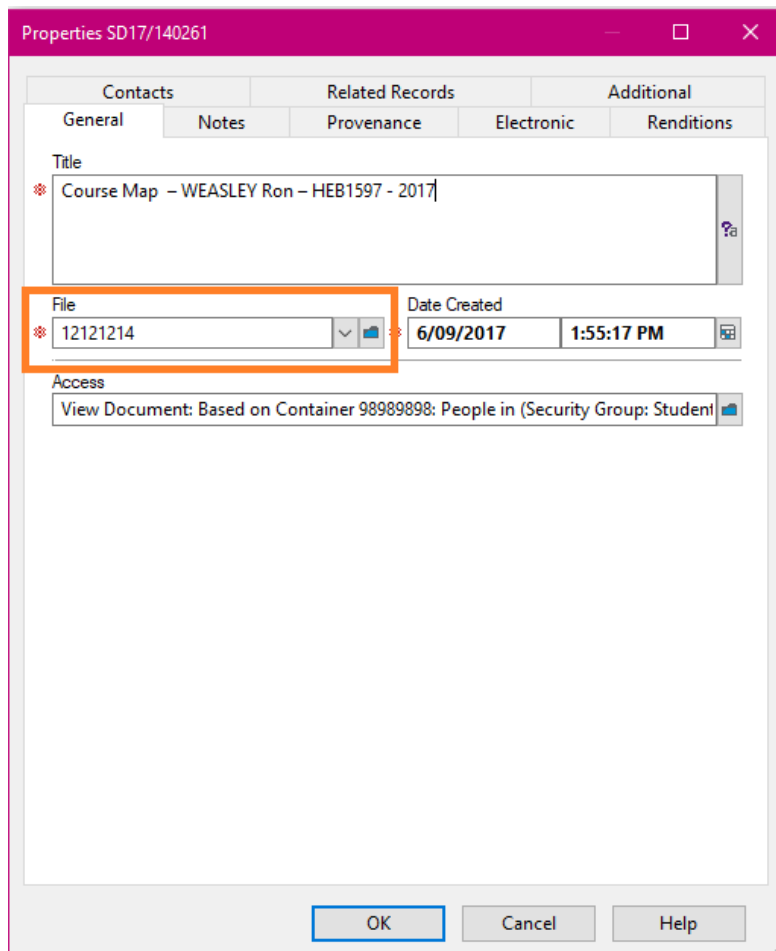
Registering a document to the wrong file (Desktop TRIM)

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.

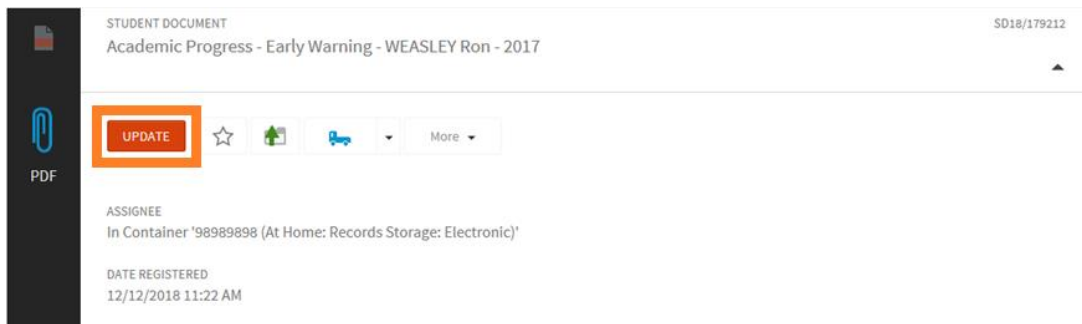
Registering a file under the wrong name (Desktop TRIM)

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.

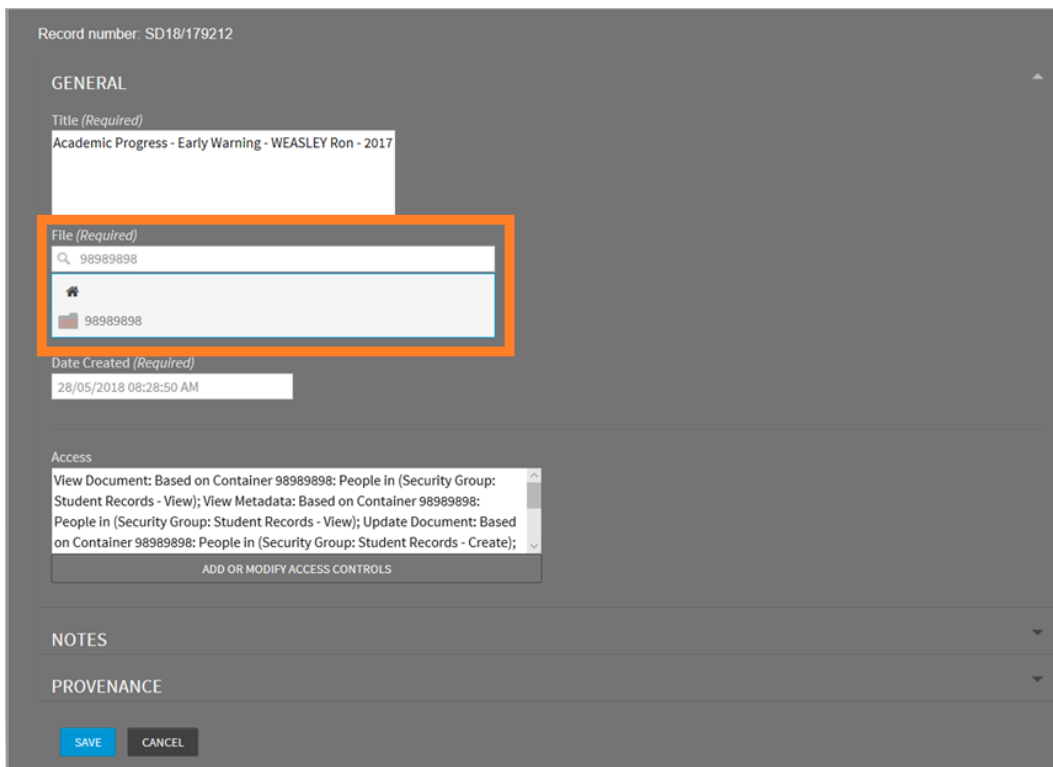
Registering a document to the wrong file (Web Client TRIM)

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'. The record number 'SD18/179212' is in the top right. On the left, there is a 'PDF' icon. In the center, there is an 'UPDATE' button highlighted with an orange border, along with other icons like a star, a trash can, and a truck. Below the update button, it says 'ASSIGNEE' and 'In Container '98989898 (At Home: Records Storage: Electronic)'. At the bottom, it says 'DATE REGISTERED' and '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 is expanded. The 'Title (Required)' field contains 'Academic Progress - Early Warning - WEASLEY Ron - 2017'. The 'File (Required)' field is highlighted with an orange border and contains a search bar with '98989898' and a list of results, including a folder icon and a file icon with '98989898'. The 'Date Created (Required)' field contains '28/05/2018 08:28:50 AM'. The 'Access' section shows 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 access list is a button that says 'ADD OR MODIFY ACCESS CONTROLS'. At the bottom, there are 'NOTES' and 'PROVENANCE' sections, and 'SAVE' and 'CANCEL' buttons.

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>>