## TRIM is an electronic document and records management system used by the University as its central corporate record keeping system for vital, high risk, high value information.

TRIM also may be referred to as HPE Content Manager, Micro Focus Content Manager or Content Manager – these are all one and the same.

# Standards for Student Placement Records

## Purpose

To provide information about the recommended record keeping requirements associated with student placement records and how to use TRIM (HPE Content Manager) to facilitate this.

## Minimum recommended requirements

The minimum recommended requirement for student placement agreements is to save the finalised agreement to TRIM using the process below.

In addition, it is possible to maintain all associated information and supporting documents to an agreement together in TRIM for convenience and to provide context. These records might include:

* meeting papers, reports and submissions
* working papers including drafts
* correspondence.

Records relating to individual student placements should be placed on the student file (see *Use of Student Files* below).

## Process

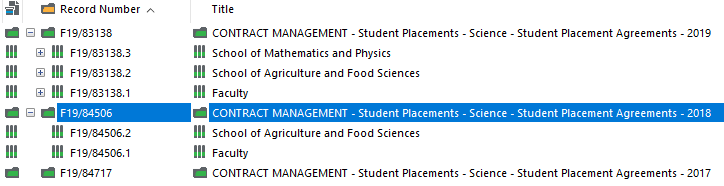
1. Create a folder (UQ File) to save the finalised agreements for each faculty by year.
   1. Open TRIM > UQ ribbon > click on new record icon  > select *UQ File > OK.*
   2. Complete the profile form as follows:
      1. In the *Classification* field select the Quick select icon C:\Users\uqjsinc3\AppData\Local\Temp\SNAGHTML2823e1.PNG
      2. Select *CONTRACT MANAGEMENT* > select *Student Placements*> OK
      3. In the *Title (Free Text Part)* enter the following details:

[Name of Faculty/School/Business Unit] - [Name of agreement] - [Year]

Note: The Classification *TEACHING AND LEARNING – Student Placements (Practicum)* should not be used to save agreements. This is for administrative arrangements for short term retention only (2 years).

1. Create a new sub-file for each school in the faculty for the designated year [Refer: [D19/645233](https://erms.records.uq.edu.au/HPEContentManager/HPRMServiceApi/Record/88632002/File/Document)].
   1. Select the UQ File > right click select *New* > *New Record*.
   2. Select UQ *Sub-File* > *OK*.
   3. Complete the *Title (Free Text Part)* field in the profile form with the name of the school > *OK*.

When complete, your folders and sub-folders should look something like this:



1. Once you have created your file containers > drag and drop your documents from the network share drive, Outlook or other locations on top of the appropriate UQ Sub-File > select UQ Document as the record type and complete the profile form or just select *OK* to save if the title is correct. [Refer: [D19/727043](https://erms.records.uq.edu.au/HPEContentManager/HPRMServiceApi/Record/95844488/File/Document) and [D19/727041](https://erms.records.uq.edu.au/HPEContentManager/HPRMServiceApi/Record/95844487/File/Document)]
2. If an agreement is deemed Commercial-In-Confidence, access controls can be applied. [Refer: [D19/644857](https://erms.records.uq.edu.au/HPEContentManager/HPRMServiceApi/Record/88592996/File/Document)] or contact Records Management and Advisory Services (details below).

## Recommended document naming convention

* The title should summarise the contents so that it is not necessary to open the record to know what it is. Include a subject, topic, record type or action.
* Make the name unique wherever possible by including “when”, “who” or a unique identifier such as a Project ID.
* Be consistent – agree on a format for dates or names and stick to it.

For example: Overarching Student Placement Agreement - Non-clinical – 2019-02-15 – Airbus

Overarching Student Placement Agreement - Clinical – 2019-11-14 - Greencross Vets Silkstone

Continuing Placement Agreement - Mathematics and Physics Industry Project – 2019-11-14 - Aginic Holdings - SCIE3255

## Use of Student Files

Individual agreements between students and partner organisations should be saved to the student’s file.

In addition, related information can be saved to student files. For example, copies of correspondence sent from *InPlace* or through *CRM*.

To automatically upload correspondence to a Student File, the minimum requirements are as follows:

* Send the finalised individual student agreement to [recordsmanagement@uq.edu.au](mailto:recordsmanagement@uq.edu.au) (*RMAS Auto Upload*in the address book).
* In the case of correspondence with the student you can blind copy (Bcc) to the above address in order to keep a copy on the student’s file.
* Use the *Send to TRIM* function within CRM.

Note: The above address is for automatic upload of documents and is not monitored for general enquiries.

#### Further information

* Visit:
  + the [Records management systems section](https://systems-training.its.uq.edu.au/systems/records-management/content-manager-trim) of the Systems Training Hub; this also provides access to multiple eLearning modules
  + F19/40817 (KNOW HOW - Education and Awareness - UQ Information Systems - Micro Focus Content Manager TRIM - How To Guide) on TRIM (link below)

Contact the Records Management and Advisory Services team at [uqcentralrecords@uq.edu.au](mailto:uqcentralrecords@uq.edu.au)

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