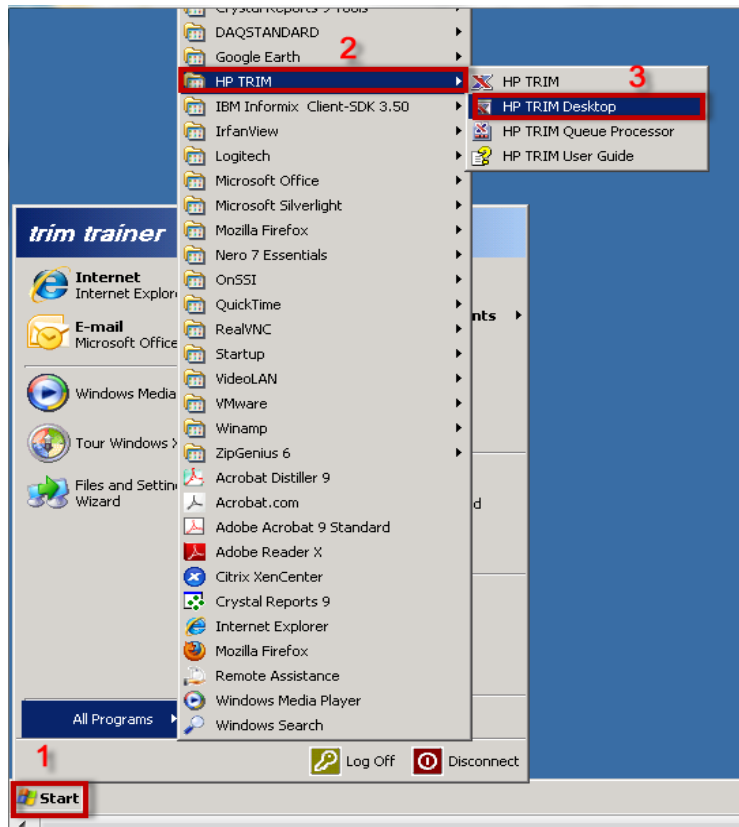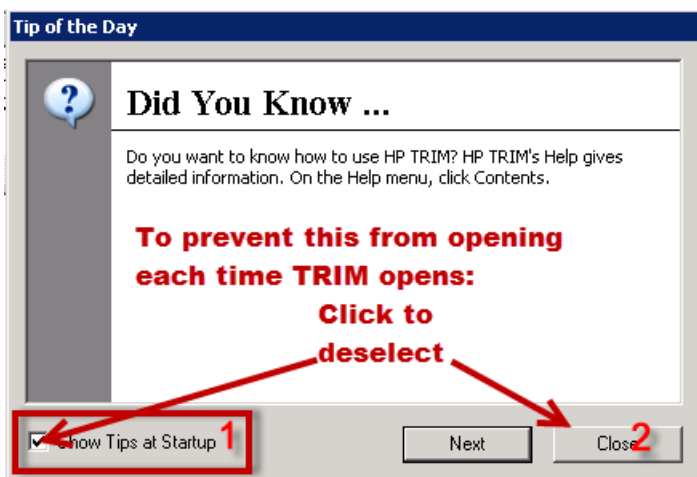# HP TRIM – Cataloging Records - Office of Metro Attorney
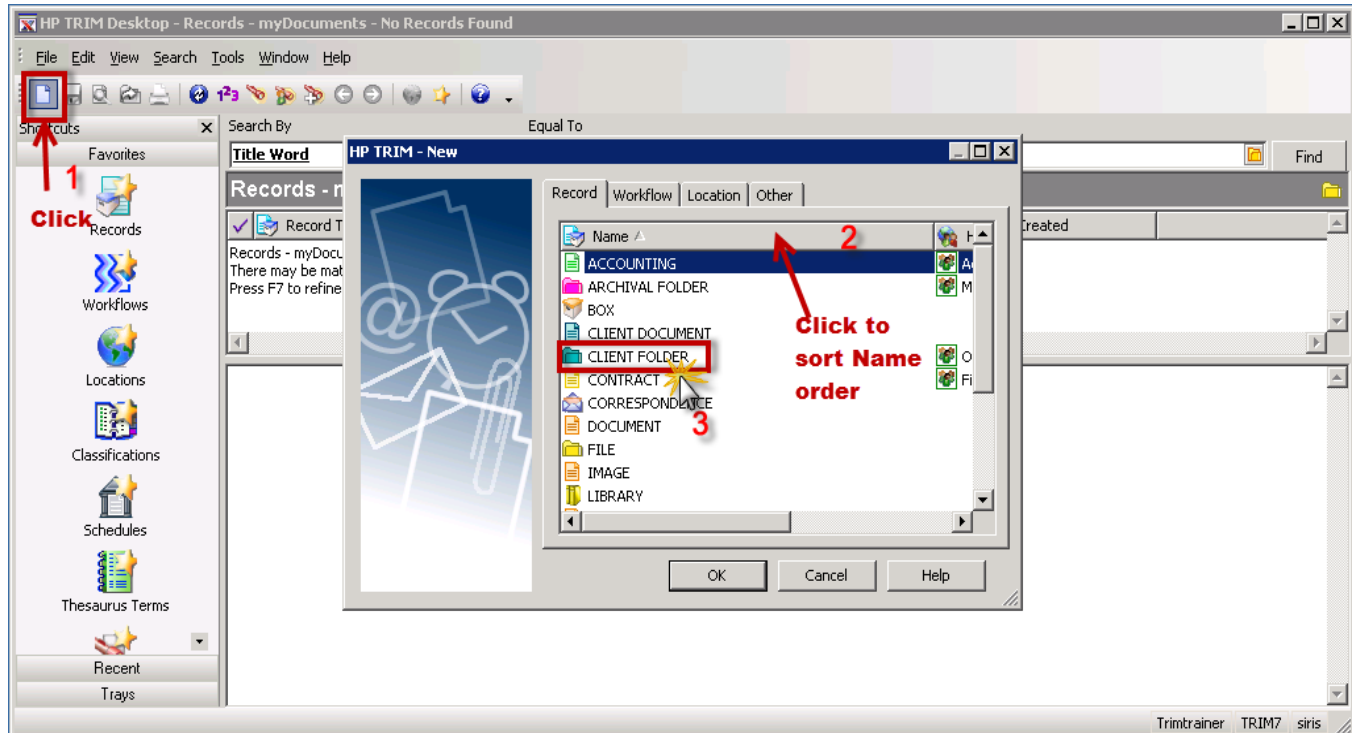
Opening HP TRIM Desktop
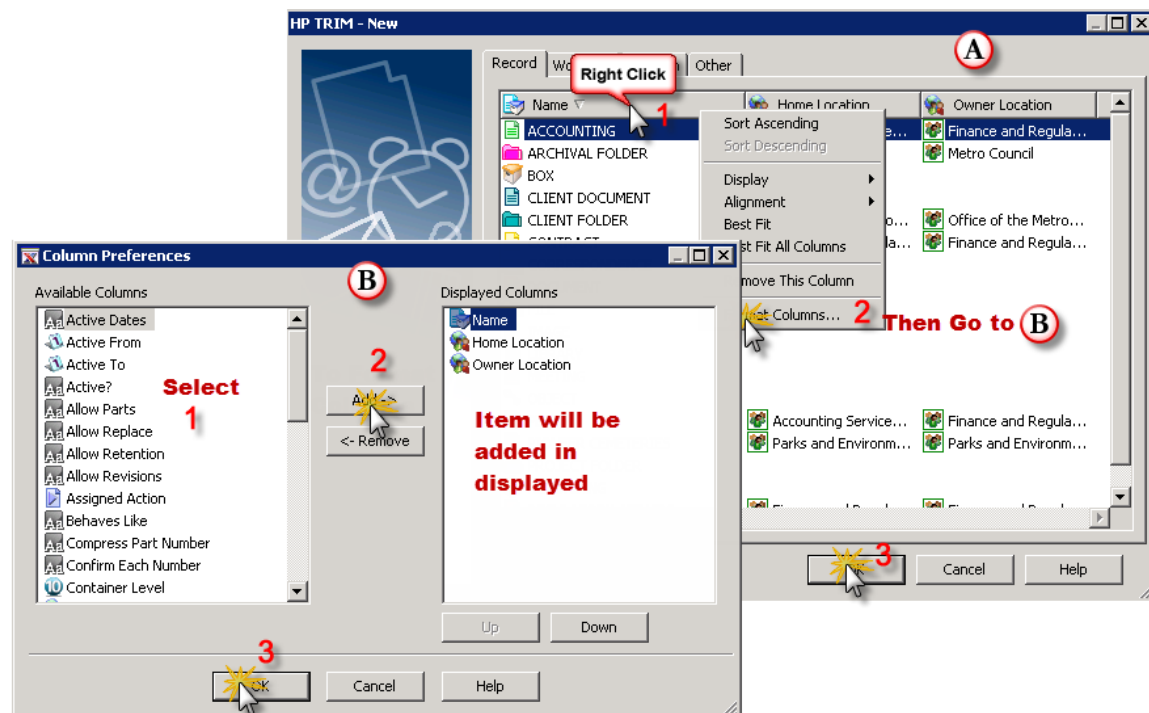

TRIM opens >> with Tip of the Day

To Create Client Folder
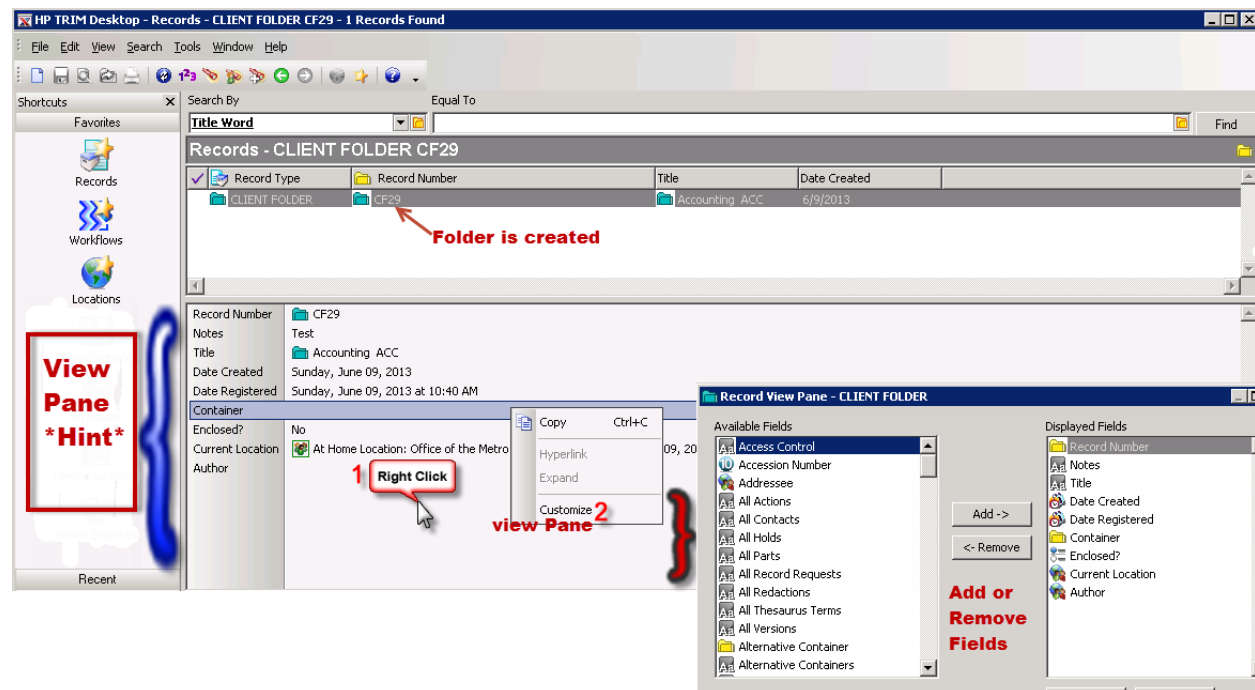

Hint to format Columns:

Client Folder

New Record CLIENT FOLDER

General

Client

Kwick Select

The Notes Field enables you to enter additonal information.

Select From Thesaurus Terms - primary

Top Term Descriptors
- Accounting ACC

Up
Down
Remove
2 Add
New Top

Client appears

Term
- Accounting ACC
- Auditor AUD
- Cemeteries CEM
- Chief Operating Officer COO
- Communications COM
- Council COU
- Development Parks and Visitors Services DPVS
- Expo Center EXPO

Related Thesaurus Terms

1
Select the client from Term(list)

Term — Accounting ACC

Properties / Notes

OK **3**   Cancel   Help

Created Folder

HP TRIM Desktop - Records - CLIENT FOLDER CF29 - 1 Records Found

File Edit View Search Tools Window Help

Shortcuts
Favorites
- Records
- Workflows
- Locations

Recent

Search By
Title Word
Equal To
Find

Records - CLIENT FOLDER CF29

Record Type	Record Number	Title	Date Created
CLIENT FOLDER	CF29	Accounting ACC	6/9/2013

Folder is created

Record Number — CF29
Notes — Test
Title — Accounting ACC
Date Created — Sunday, June 09, 2013
Date Registered — Sunday, June 09, 2013 at 10:40 AM
Container
Enclosed? — No
Current Location — At Home Location: Office of the Metro
Author

View Pane *Hint*

1 Right Click

Copy   Ctrl+C
Hyperlink
Expand
Customize **2**

view Pane

Record View Pane - CLIENT FOLDER

Available Fields
- Access Control
- Accession Number
- Addressee
- All Contacts
- All Actions
- All Holds
- All Parts
- All Record Requests
- All Redactions
- All Thesaurus Terms
- All Versions
- Alternative Container
- Alternative Containers

Add ->
<- Remove

Displayed Fields
- Record Number
- Notes
- Title
- Date Created
- Date Registered
- Container
- Enclosed?
- Current Location
- Author

Add or Remove Fields

Client Document