



Tasmania

Pilot

Service Tasmania Unit – TRIM Context

Project Business Plan

RECORDS

DEPARTMENT OF PREMIER AND CABINET

Draft Version March 2005

DOCUMENT ACCEPTANCE and RELEASE NOTICE

This is Version 0.A of the Service Tasmania Unit - TRIM Context Pilot Project Business Plan.

The *Project Business Plan* is a managed document. For identification of amendments each page contains a release number and a page number. Changes will only be issued as a complete replacement document. Recipients should remove superseded versions from circulation. This document is authorised for release once all signatures have been obtained.

PREPARED: _____ DATE: ___/___/___
(for acceptance) Lisa Baker, Manager Records

ACCEPTED: _____ DATE: ___/___/___
(for release) Glenn Hill, Manager Service Tasmania Unit

This document has been derived from a template prepared by the Department of Premier and Cabinet, Tasmania. The structure is based on a number of methodologies as described in the *Tasmanian Government Project Management Guidelines*.

For further details, refer to <http://www.projectmanagement.tas.gov.au>.

1. Pilot Project

1.1. Introduction

Service Tasmania Unit has been selected as the first pilot to test the management of emails and other electronic records using the department's records management software (TRIM). The Unit has well organised information and uncomplicated work processes. This will assist with any technical issues before dealing with areas, which have complicated workflow. The Unit may also have business related emails stored on the G drive.

1.2. Background

This project has been initiated, as Service Tasmania Unit have no records management software in operation, and the hardcopy records are incomplete as much of the information is kept electronically on the Units G drive.

1.3. Purpose

The purpose of the project is to provide a process to ensure that the knowledge acquired by the Service Tasmania Unit is captured as Corporate Information in an efficient and effective manner.

It will assist the Unit in managing version control and workflow relating to circulating documents and managing obligations to respond to corporate information. ????

1.4. Objectives

- Improve efficiency of record retrieval;
- Enable better quality advice through improved access to information;
- Enable shareable and reusable information; and
- Decrease storage costs through disposal procedures.

1.5. Scope

This pilot will involve:

- the migration of electronic records currently stored on the Units G drive;
- the migration of business electronic records stored on personal drives;
- the classification and registration of emails;
- the classification of new electronic documents; and
- scanning of new hardcopy documents including the classification and registration.

All the classification and registration will be done using TRIM Context.

1.6. Exclusions

This pilot does not include:

- Microsoft Access
- Microsoft Photo Editor
- WinZip – WinZip will need to be opened and then saved.

1.7. Constraints and Assumptions

Assumptions

- The classification system (Thesaurus) will already have been decided;
- Associated training will be coordinated with the conversion of the G drive;
- Records staff in conjunction with the Unit will convert specific records to the new classification system in TRIM where conversion is justified;
- Paper files will no longer be created in the Unit unless there is a business or legal requirement to do so e.g. documents that need to be hardcopy original format for evidentiary purposes;
- If paper files are to be created, they will be related to associated electronic records;
- Appropriate hardware and software have been installed;
- Incoming hardcopy records will be scanned;
- Service Tasmania Unit will use TRIM Context to manage their records; and
- Outlook Exchange training has occurred.

Constraints

- Staff unable to undertake training;
- *Jane & Neil need you to provide some technical constraints if any*

1.8. Output(s)

Implementation of the department records management software (TRIM Context) to enable electronic records management within the Service Tasmania Unit.

Electronic records are defined as:

- Email;
- Word;
- Excel; and
- PowerPoint.

Development of guidelines and procedures to address requirements related to electronic records management.

1.9. Project Activities and Milestones

Id	Description	Who	Scheduled Start	Scheduled Finish	Predecessor
	Outlook Exchange Installed on desktop	ISB			
	Outlook Exchange Training completed	ISB			
	TRIM Context Installed on desktops	ISB			
	Scanner hardware and software installed	ISB			
	Classification scheme (Thesaurus) imported to TRIM	JD			
	Disposal Schedules imported to TRIM	JD			
	TRIM Training	JD			
	G Drive conversion	JD			
	Personal Drive conversion if required	JD			

1.10. Budget

A consultant fee of \$5000k is required for technical and procedural knowledge of TRIM Context.

No other expenditure is anticipated as the project is being undertaken internally, and hardware and software relating to this project has already been purchased.

1.11. Resources

TRIM Training Officer – TRIM Administrator

- Identify learning outcomes;
 - Develop procedures;
 - Schedule training;
 - Deliver training;
 - Deliver one-on-one training as required; and
-

- Support implementation/conversion of TRIM by being available to field questions.

Technical Support - ISB

Provide production support for the TRIM system including technical maintenance and support for other hardware and software.

2. Project Management Plan

2.1. Governance

Project Owner

Glenn Hill - Manager of Service Tasmania Unit Glenn Hill

Project Manager

Lisa Baker – Manager Records

Project Team

Jeanette Donohue – TRIM Administrator

Neil MacKinnon – Helpdesk Coordinator

Working Group

Service Tasmania Unit Staff

2.2. Closure & Outcome

Closure

- Conversions from G drive to TRIM Context completed; and
- All staff at Service Tasmania Unit using TRIM Context for electronic records management.

Outcome

- Electronic records management by Service Tasmania Units staff using TRIM Context;
 - Identification of opportunities for electronic records management elsewhere within the department; and
 - Djskjdsdhsfsdjfdkjdsf.
-

3. Record Type Configuration Worksheets

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
General Tab:			
Record Type Name	User-specified	Mandatory	
Behaviour	1. Document 2. Folder 3. Series 4. Box 5. Folder (Paper Only)		
Container Level	0-9	Mandatory	
Titling Method	1. Free Text 2. Classification 3. Thesaurus Term - ISO 4. Thesaurus Term - Descriptor 5. Client	Mandatory	
Allow Blank Free Text Title? (For Titling Methods other than Free Text)	Yes/ No		Yes / No
	If <i>Yes</i> to the previous question: Hide Free Text Title On Data Entry Form? Yes/ No		Yes / No

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
Behaviour for Duplicate Titles	<ol style="list-style-type: none"> 1. Ignore 2. Display Warning 3. Prevent 	Mandatory	
Start Classification	From your TRIM Classification Plan		
All Records must be within this Classification	From your TRIM Classification Plan		
Behaviour for handling more secure Documents	<ol style="list-style-type: none"> 1. Ignore 2. Display Warning 3. Display Warning, Update Container Security 4. Upgrade Container Security 5. Prevent Document from being placed in Container 6. Display Warning, Update Document Security 7. Update Document Security 	Mandatory	
Behaviour for handling less secure Documents	<ol style="list-style-type: none"> 1. Ignore 2. Display Warning 3. Prevent Document from being placed in Container 4. Display Warning, Update Document Security 5. Update Document Security 	Mandatory	
Records should be placed within a Series	Yes/ No		Yes / No

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
Menu Tab:			
<i>Note:</i> The <i>Menu tab</i> allows you to define which tasks may be performed on records of the selected Record type (by default <u>all</u> Menu items will be activated).	Too numerous to list here. See the TRIM Context On-line Help, Administrator Guide – Record Types – Record Type Dialogs – Menu Tab, for more information.		
Prevent users without 'Record Administration' permission from overwriting existing Notes	Yes/ No		Yes / No
Allow users without 'Modify Record' Permission to Append to Notes	Yes/ No		Yes / No
Allow users without 'Modify Record' Permission to Change Assignee	Yes/ No		Yes / No
Audit Tab:			

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
<p><i>Note:</i> The <i>Audit</i> function allows you to define what audit event information will be available for display when you select Audit/Security - Active Audit Events from the record's right-click menu for records of this type in TRIM Context (by default <u>no</u> events will be logged).</p>	<ul style="list-style-type: none"> • Assignee Changed • For others, select from list. See the TRIM Context On-line Help, Administrator Guide – Record Types – Record Type Dialogs – Audit Tab, for more information. 		
Defaults Tab:			
Class	<ol style="list-style-type: none"> 1. Vital 2. Corporate 3. Workgroup 4. Personal 5. Reference 6. Temporary 	Mandatory	
Owner Location	From your Locations table		
Home Location	From your Locations table		
Track During Census?	Yes/ No		Yes / No
Home Location can be a Space?	Yes/ No		Yes / No
Retention Schedule	From your Archive Retention Schedules table		

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
Disposition	<ol style="list-style-type: none"> 1. Active 2. Inactive 3. Archived (Local) 4. Archived (Interim) 5. Archived (Permanent) 	Mandatory	
Prevent Disposition changes for Records with no Schedule	Yes/ No		Yes / No
<i>Record Access Defaults</i>			
Security Level	<ul style="list-style-type: none"> • Unclassified • Any other choice from your Security Levels table 	Mandatory	
Active Caveats	Any caveat(s) from your Caveats table		
<i>Access Controls:</i>			
View Document	<ol style="list-style-type: none"> 1. Everyone 2. Private 3. Custom - Restricted to the following Locations (and any of their members) 	Mandatory	
View Metadata	<ol style="list-style-type: none"> 1. Everyone 2. Private 3. Custom - Restricted to the following Locations (and any of their members) 	Mandatory	
Update Document	<ol style="list-style-type: none"> 1. Everyone 2. Private 3. Custom - Restricted to the following Locations (and any of their members) 	Mandatory	

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
Update Record Metadata	<ol style="list-style-type: none"> 1. Everyone 2. Private 3. Custom - Restricted to the following Locations (and any of their members) 	Mandatory	
Modify Record Access	<ol style="list-style-type: none"> 1. Everyone 2. Private 3. Custom - Restricted to the following Locations (and any of their members) 	Mandatory	
Destroy Record	<ol style="list-style-type: none"> 1. Everyone 2. Private 3. Custom - Restricted to the following Locations (and any of their members) 	Mandatory	
<i>Workflow/Action Tab:</i>			
Initiate Action	From your Procedures table		
OR Days Until Due	User-specified number of days		
Update the Record's due date whenever an action step or Workflow Activity becomes due?	Yes/No		Yes / No
Initiate Workflow from Workflow Template?	From your Workflow Templates		
<i>Numbering Tab:</i>			

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
Numbering Method	1. Using another Record Type Number Pattern 2. Number Pattern 3. Based on Container Record 4. Based on Classification	Mandatory	
			<i>If Option 1 Selected go to next section (Electronic Tab)</i>
<i>If Option 2 Selected: (Using a Number Pattern)</i>			
Pattern	User-specified	Mandatory	
Last Number	User-specified &/or from Number pattern	Mandatory	
Reset Generated Numbers at Year's End?	Yes/No		Yes / No
Confirm Each generated Number?	Yes/No		Yes / No
Part Numbering	1. Record Type does not allow New Parts to be Created 2. Use the Next Generated Record Number 3. Use Part Number		
			<i>If Options 1 or 2 Selected go to next section (Electronic Tab)</i>
	<i>If Use Part Number selected:</i>		

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
Part Separator	1. / 2. . 3. - 4. # 5. ~ 6. V 7. P 8. : 9. \	Mandatory	
Compress Part Number?	Yes/ No		Yes / No
<i>If Option 3 Selected: (Based on Container Record)</i>			
Separator	1. / 2. . 3. - 4. # 5. ~	Mandatory	
Digits	1-20	Mandatory	
Compress Container Number?	Yes/ No		Yes / No
Reset Generated Numbers at Year's End?	Yes/ No		Yes / No
Confirm Each generated Number?	Yes/ No		Yes / No

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
Part Numbering	<ol style="list-style-type: none"> 1. Record Type does not allow New Parts to be Created 2. Use the Next Generated Record Number 3. Use Part Number 		
			<i>If Options 1 or 2 Selected go to next section (Electronic Tab)</i>
	<i>If Use Part Number selected:</i>		
Part Separator	<ol style="list-style-type: none"> 1. / 2. . 3. - 4. # 5. ~ 6. V 7. P 8. : 9. \ 	Mandatory	
Compress Part Number?	Yes/ No		Yes / No
			<i>Go to next section (Electronic Tab)</i>
<i>If Option 4 Selected: (Based on Classification)</i>			
Prefix Pattern	User-specified		
Prefix Last Number	User-specified &/or from Number pattern		
Suffix Pattern	User-specified		

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
Suffix Last Number	User-specified &/or from Number pattern		
Generated Number from Plan?	Yes/ No		Yes / No
Reset Generated Numbers at Year's End?	Yes/ No		Yes / No
Confirm Each generated Number?	Yes/ No		Yes / No
Part Numbering	<ol style="list-style-type: none"> 1. Record Type does not allow New Parts to be Created 2. Use the Next Generated Record Number 3. Use Part Number 		
			<i>If Options 1 or 2 Selected go to next section (Electronic Tab)</i>
	<i>If Use Part Number selected:</i>		
Part Separator	<ol style="list-style-type: none"> 1. / 2. . 3. - 4. # 5. ~ 6. V 7. P 8. : 9. \ 	Mandatory	
Compress Part Number?	Yes/ No		Yes / No

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
<i>Electronic Tab:</i>			
Allow electronic objects to be attached to records of this type? If so, into which document store will they be placed?	<ol style="list-style-type: none"> 1. No Electronic Object support for this Record Type 2. Use the Default Electronic Store 3. Use the Nominated Document Store (below) 	Mandatory	
			<i>If Option 1 Selected go to next section (User Fields Tab)</i>
<i>If option 2 selected: (Use Default Electronic Store)</i>			
Suppress Content Indexing?	Yes/ No		Yes / No
Allow Replace?	Yes /No		Yes / No
Allow Revisions?	Yes /No		Yes / No
			<i>Go to next section (User Fields Tab)</i>
<i>If option 3 selected: (Use Nominated Store)</i>			
Store Name	From your Document Stores table	Mandatory	
Suppress Content Indexing?	Yes/ No		Yes / No
Allow Replace?	Yes /No		Yes / No
Allow Revisions?	Yes /No		Yes / No
<i>User Fields Tab:</i>			

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
User Fields available for this Record Type:	Refer to <i>Appendix 5 – TRIM User Defined Field Formats</i> for more information.		User Fields Required:
Form Tab:			
** See separate Record Entry Form Configuration Worksheet on Page 20			
Access Controls Tab:			
Can Use	<ol style="list-style-type: none"> 1. Everyone 2. Private 3. Custom - Restricted to the following Locations (and any of their members) 	Mandatory	
Can Update	<ol style="list-style-type: none"> 1. Everyone 2. Private 3. Custom - Restricted to the following Locations (and any of their members) 	Mandatory	
Can Modify Access	<ol style="list-style-type: none"> 1. Everyone 2. Private 3. Custom - Restricted to the following Locations (and any of their members) 	Mandatory	

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
Can Delete	<ol style="list-style-type: none"> 1. Everyone 2. Private 3. Custom - Restricted to the following Locations (and any of their members) 	Mandatory	
Notes Tab:			
Notes	Anything you like, to provide supplementary information about this Record Type		
Active Tab:			
Active From	User-specified date		
Active To	User-specified date		

4. Record Entry Form Configuration Worksheet

Form Name: _____

Required Fields:

List all required fields in the table below, in the order you want them to appear. Remember, the Record Entry Form is only for the creation of **new** records. At the bottom of this page is a list of fields that *can* be placed on the Record Entry Form. Some of these fields may be unavailable because of your licensing or because you have disabled a task. Record Title will automatically appear on the Record Entry Form. The Record Number is assigned when saving a record, and therefore is not an available field.

Field Name	Mandatory?	Read Only?
4.1.1.1	<input type="radio"/>	<input type="radio"/>
4.1.1.2	<input type="radio"/>	<input type="radio"/>
4.1.1.3	<input type="radio"/>	<input type="radio"/>
4.1.1.4	<input type="radio"/>	<input type="radio"/>
4.1.1.5	<input type="radio"/>	<input type="radio"/>
4.1.1.6	<input type="radio"/>	<input type="radio"/>
	<input type="radio"/>	<input type="radio"/>
	<input type="radio"/>	<input type="radio"/>
	<input type="radio"/>	<input type="radio"/>
	<input type="radio"/>	<input type="radio"/>
	<input type="radio"/>	<input type="radio"/>
	<input type="radio"/>	<input type="radio"/>

List of Available Fields

Access Control	Date Due	Priority
Accession Number	Date Finalised	Record Class*
Addressee	Date Published	Representative
Author	Date Registered*	Retention Schedule
Record Classification	Date Due for Destruction	Security*
Consignment	Enclosed?	Client
Container	External ID	
Disposition*	Foreign Barcode	
Any User-Defined Fields	Home Location*	<i>*Indicates the Field is</i>
Assignee*	Notes	<i>already mandatory and</i>
Date Closed	Other Contact	<i>will be populated by</i>
Date Created*	Owner Location*	<i>default</i>

5. System Configuration Options Worksheets

For further information on configuring your System Options, see the TRIM On-Line Help:

- Administrator Guide – Context Administration Functions – System Options.

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
<i>General Tab:</i>			
When placing a record in a closed container	1. Ignore 2. Display Warning 3. Prevent	Mandatory	
Minimum number of Thesaurus Terms required when Titling Records	1-8	Mandatory	
When Checking Dates against Record Date Created: Ignore Chronological Discrepancies?	Yes/ No		Yes / No
When Editing Notes and Record Titles: Insist that Spelling is Checked with the Spelling Checker?	Yes/ No		Yes / No
When Creating a Record from an E-mail Message: Convert all Recipients to Contacts for the Record?	Yes/ No		Yes / No

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
When creating a new Record with an attached document: Suppress Automatic Profiling of the record from the document profile?	Yes/ No		Yes / No
Capturing Native Mail Renditions	<ol style="list-style-type: none"> 1. Do Not Capture Native Mail Renditions 2. Simplest (Linked) Format 3. Advanced (Long-Term) Format 		
When Creating a new Record with an attached Document	Suppress Automatic Profiling of the Record from the document profile Yes/ No		Yes / No
When changing disposition or removing Records	Display a warning if the Record is related to other Records Yes/ No		Yes / No
Security Tab:			
When searching, do not retrieve Records that have a higher Security Profile than the Current User	Yes/ No		Yes / No

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
When changing a Record's Assignee, Home Location or Owner Location to a less secure Location:	1. Ignore 2. Display Warning 3. Prevent	Mandatory	Note: Already covered this question in Section 3 – Security, earlier in the Workbook.
Use 'Shredder Delete' for electronic documents	Yes/ No		Yes / No
Filter Classifications that a user has no access to	Yes/ No		Yes / No
Implement US DoD 5015.2 Classified Security Procedures	Activate the Classified Security functionality specific to the United States Department of Defence		
Digital Signature Hashing Algorithm:	1. Secure Hash Algorithm 2. Message Digest 5	Mandatory	
<i>Locations Tab:</i>			
Default setting for Record Assignee (unless otherwise specified):	1. Current Login 2. Default Position of Current Login 3. Default Organization of Current Login.	Mandatory	
Default setting for Record Owner Location (unless otherwise specified):	1. Assignee 2. Default Organization of Assignee Location.	Mandatory	

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
	Use Owner Location from the Container Yes/No		Yes / No
Default setting for Record Home Location (unless otherwise specified:	1. Assignee 2. Default Organization of Assignee Location.	Mandatory	
Display and Reporting Format for Names of People:	Display the Last Name first? Yes/No		Yes / No
	Display Initials rather than First Names Yes/No		Yes / No
	Display any Suffix (eg. PHD) Yes/No		Yes / No
	Display any Title (eg Mr) Yes/No		Yes / No
When Validating a Location in a data entry field:	Use strict validation for Record Contacts Yes/No		Yes / No

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
	Use strict validation for any other uses of Locations Yes/No		Yes / No
<i>Workflow Tab:</i>			
Start of Working Day:	User-specified time	Mandatory	
End of Working Day:	User-specified time	Mandatory	
Calendar	User-specified days		
Automatic rescheduling of due dates for subsequent Actions:	Reschedule if an Action is completed Early Yes/No		Yes / No
	Reschedule if an Action is completed Late Yes/No		Yes / No
Allow Relaxed Date checking for Procedures	Yes/No		Yes / No

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
<i>Barcodes Tab:</i>			
When printing barcodes for Records:	<ol style="list-style-type: none"> 1. Print TRIM Barcode 2. Print TRIM Barcode, Clear Any Foreign Barcode 3. Print Foreign Barcode, if it exists 	Mandatory	
When printing other types of Barcodes:	<ol style="list-style-type: none"> 1. Print TRIM Barcode 2. Print TRIM Barcode, Clear Any Foreign Barcode 3. Print Foreign Barcode, if it exists 	Mandatory	
<i>Web Server Tab:</i>			
When using ContextWeb to connect to this database via the Internet, use the following URL:	User-specified URL		
Use the WebDrawer URL format	Yes/ No		Yes / No
<i>Events Tab:</i>			
Send E-mail Notification of Security Breaches To:	Selected location from your Locations table		

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
Send E-mail notification when Document Stores approach capacity limits:	Selected location from your Locations table		
E-mail notification for Activity/Action Assignees:	Activity/Action is first assigned Yes/No		Yes / No
	Activity/Action is ready to commence, or has been reassigned Yes/No		Yes / No
	Activity/Action becomes overdue Yes/No		Yes / No
Processing of changes to Disposition Event Schedules	Create indexes for pending event searches Yes/No		Yes / No

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
Logging of events for audit and billing purposes	Log events to the TRIM Audit Log Yes/No (If “Yes”, you will also be prompted to select which events (out of approx 40) should be included in the log)		Yes / No
	Log events to the TRIM Billing Log Yes/No (If “Yes”, you will also be prompted to select which events (out of approx 40) should be included in the log)		Yes / No
Permissions Tab:			
Note: The Permissions function allows you to define the default permissions for the various User Types allowed in TRIM Context.	Too numerous to list here. See Error! Reference source not found. on Page Error! Bookmark not defined.		

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
<p>JITC? Activates the specialized JITC (Joint Interoperability Test Command) set of permissions developed for the United States Department of Defence. Selecting this option will modify the User Type permissions to comply with JITC requirements.</p>	<p>Yes/No</p>		<p>Yes / No</p>
<i>Currency Tab:</i>			
Currency Symbol	User-specified (\$)	Mandatory	
Positive Currency Format	<ol style="list-style-type: none"> 1. \$1.1 2. 1.1\$ 3. \$ 1.1 4. 1.1 \$ 	Mandatory	

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
Negative Currency Format	(\$1.1) -\$1.1 \$-1.1 \$1.1- (1.1\$) -1.1\$ 1.1-\$ 1.1\$- -1.1 \$ -\$ 1.1 1.1 \$- \$ 1.1- \$ -1.1 1.1- \$ (\$ 1.1) (1.1 \$)	Mandatory	
Decimal Symbol	User-specified (.)	Mandatory	
No of decimal digits	0-5 (2)	Mandatory	
Digit Grouping Symbol	User-specified (,)	Mandatory	
Digit Grouping	1. 123456789 2. 123,456,789 3. 1,23,45,67,89	Mandatory	
Miscellaneous Tab:			
Enable Scheduled Tasks	Yes/ No		Yes / No

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
	<i>If yes to above:</i> Enable Scheduled Tasks Yes/No		Yes / No
When using Classifications:	Limit the display of classifications Numbers Yes/No		Yes / No
When placing a Record within a Container (or Allocating to a Classification):	Records that behave as Documents can only be contained within Records that behave as Folders Yes/No		Yes / No
Ensure US DoD 5015.2 Compliance	Yes/No Will need to have the Classified Security License		Yes / No
Allow records that are within a container to be added to Holds	Yes/No		Yes / No

Configuration Setting/Parameter	Options/Restrictions (Default shown in Bold)	Mandatory?	Your Choice
<i>Record Searches Tab:</i>			
Available Search Methods	Too numerous to list here. You can select Search Methods to be blocked, hence preventing users from conducting those searches.		

6. Appendices

- Records Management Framework;
- Management of Electronic Records Guideline;
- Corporate Information Management Guidelines;
- TRIM Context Power User Manual; and
- TRIM Context Desktop User Manual.