



Auto E-file of Outlook Messages to TRIM

(last updated March 2015)

How it works

The email auto e-filing facility can automatically file away emails to students, if

1. A valid SID is present on the email subject (e.g. Re: admission offer 299900001 additional requirements), and
2. No character(s) in front of or immediately after SID (bad example is: Re Admission offer299900001no additional requirements. The SID has to be an independent word anywhere in the subject line).
3. The email has been BCC'ed to **TRIM Email1** efile2rol1@sydney.edu.au. Please do not cc this email address when replying to students or applicants.
4. The email senders need to be recognised by our set up – this requires the line manager to send us a list of authorised staff members.
5. A sub folder under the inbox of **TRIM Email1** efile2rol1@sydney.edu.au for each registered business unit will be created. Once a bcc'ed email comes through, outlook will move it to a specific subfolder based on the established rules. From there, the email will be auto e-filed into the respective Student File based on the rules specific to the business unit.
6. The backlog emails or emails have not bcc'ed to **TRIM Email1** efile2rol1@sydney.edu.au (may be someone forgot to bcc at the time of sending) can either be copied or dragged to the **business unit specific** folder by the authorised personnel of the unit. If copied to the subfolder, we encourage users to establish local rules to indicate what has already been copied and what is yet to be copied, to eliminate double or triple saving to TRIM, or worse - not copied and consequently processed into Student File in TRIM.
7. Message with no SID will be treated as an exception and will require each business unit to deal with them manually.

General rules:

1. Do not use this method for filing of emails of sensitive nature – for example matters regarding misconduct, appeals or any other matters that would normally be filed in an administrative file but not on student file.
2. Use of this email address should be discreet, as we do not want student cc their reply to this email address, and if happens, the email will not be captured in their official University student file and clogging up our Exchange inbox quota.
3. Do not use this facility to file one email to multiple students – as it would only look and stop on the first SID the software could see, and generally this practice has the risks of Privacy breach.

What if:

1. No SID presented in email subject title – the email still gets processed and sent to an exception folder. The respective business unit needs to devise a local routine and rules to ensure all the exceptions are been dealt with in a timely manner. This includes assign the responsibility to a small individual and

ensure on a weekly or a monthly basis, someone performs the task of manually filing the exception records to their respective student file. TRIM alert could be set up when a record gets saved into an exception folder in TRIM. This can be utilised to remind the responsible staff member to action on these records.

2. Wrong SID has been used in title (message was intended for student A, but with the SID of student B in subject) – the email message will be placed in the student B, there is no validation could be done at our end.
3. Student cc'ed their email to **TRIM Email1** efile2rol1@sydney.edu.au. These emails will not be saved to TRIM. If you see this from the student, please do not assume this email has already been e-file to TRIM.

Support to be provided by RMS:

Please contact Records Online records.online@sydney.edu.au helpdesk (x69537) on the following matters:

1. Emails not been processed from your subfolder (should be very rare)
2. How to – provide training to new staff, and establish procedure
3. Allow new or dis-allow terminated personnel to access this facility