



The courses listed below will be presented during TRIM Context Training at TOWER Software's Training Facilities.

Desktop User Course – Day 1

Who should attend this course?

The Desktop User Course is designed for those who will use TRIM Context Desktop which integrates with ODMA Desktop applications. The TRIM Context user who should attend this course will perform regular End User tasks and have End User permissions in TRIM.

Prerequisite

None required.

Overview

These courses cover the functional areas of TRIM Context Desktop as a standalone application, or through an integrated product like Microsoft Word.

The course covers the following areas:

- TRIM Context Desktop
- Creating and registering electronic documents into TRIM Context
- Searching in TRIM Context
- Editing documents or checking documents out of TRIM Context to modify or copy
- Revision and Version Control
- Maintenance of electronic documents
- Cataloguing e-mail

ice User Course – Day 1

Who should attend this course?

The *ice* User Course is designed for users who will access TRIM Context through the web interface – *ice*. *ice* can be used as a tool to collaborate with other colleagues on documents, to track documents (both paper and electronic), and to catalogue important records.

Prerequisite

None required.

Overview

The course covers the functional areas of *ice*, including:

- Registering electronic documents
- Searching for records, contacts, etc
- Editing documents or checking documents out of *ice* to modify or copy
- Revision and Version Control
- Maintenance of electronic documents
- Cataloguing e-mail
- Creating labels, and active labels



Power User Course– Day 2

Who should attend this course?

The Power User Course is aimed at those who require extensive access to TRIM Context functionality. They perform daily records maintenance tasks including creating folders, moving records, applying retention schedules, etc. The TRIM Context user who should attend this course will have Administrator, Information Manager or Information Worker permissions in TRIM.

Prerequisite

None required.

Overview

The major functional areas of TRIM Context are explored in detail, such as:

- Creating records
- Searching and moving records in TRIM
- Modifying metadata of records
- Editing electronic documents or checking documents out of TRIM Context to modify or copy
- Revision and Version Control
- Maintenance of electronic documents
- Cataloguing e-mail
- Running reports
- Applying retention schedules

Application Administration Course – Day 3 & 4

Who should attend this course?

The Administration Course is designed for those who are responsible for setting up and/or maintaining TRIM Context as a working system with Locations, Security, Record Types, and Classifications etc. Typically this person will become a TRIM Context Administrator and may be a Records or Information Manager in an organization. In order to make the implementation of TRIM Context specific to the needs of the Organization and simple for users, administrators must spend time planning and designing a system that meets their business needs.

Prerequisite

The Power User course is a prerequisite

Overview

The aim of the course is to explain the primary administrator functions within TRIM Context and how to use them, including:

- Record types - all the properties of record types including security, numbering patterns, default values and entry forms
- Locations - all the properties of locations, including security, profiles and user permissions.
- Thesaurus and/or Classification System – setup and administration of these areas.
- Security in TRIM Context - set-up and explanation of Security
- Retention schedules and action tracking – set up and administration of these areas
- TRIM Context system options – set up and administration of the system options.



Certification Exam – Day 5

Exam

The Certification Exam is a proctored exam available to those who have completed the Application Administrator Course. In fact, the exam is delivered the day after the Application Administrator course. The certification exam is designed to test competency in the set up and use of all aspects of TRIM Context. It is designed for those who are responsible for setting up and/or maintaining TRIM Context as a working system with Locations, Security, Record Types, and Classifications etc. Typically those taking the exam will become a TRIM Context Administrator and may be a Records or Information Manager in an organization.

Prerequisite

The Application Administration course is a prerequisite.

Overview

The certification exam tests user competency in the creation and use of the following aspects of TRIM Context:

- Security
- Locations
- Retention schedules
- Thesaurus
- Actions and Procedures
- Classification Plans
- Record types
- System options and user configurations

Daily Costs

TOWER Training Facility	Minimum/ Maximum Class Size	Duration (Days)
TRIM training Courses are \$495/ day / person	8 to 12	4
* TRIM Certification Exam \$645/ person	8 to 12	1

* Rate includes TRIM Certification Exam Grading Fee

Morning/ Afternoon Snacks and a variety of beverages will be provided.
Lunch will not be provided



Booking Training

In order to secure a seat for this training:

E-mail training@towersoft.com to express your interest. Your seat is confirmed once a PO or credit card payment is received by TOWER Software. The PO/ credit card payment should be received within 10 business days prior to course start date.

Booking Conditions:

- Courses are run with a minimum number of participants as listed in above.
- Training sessions are limited to the number of participants as listed in the tables above.
- Scheduled courses may include participants from more than one organization.
- Course costs are as listed in the tables. No reduction in cost applies if the course is completed in less time than that indicated in the tables.
- If tentative bookings are not confirmed within 10 business days of the course start date, the course will be cancelled.
- Courses are confirmed upon receipt of a purchase order for the total amount of the requested training. Prices are listed in the tables above.
- Cancellation notice must be received by TOWER Software a minimum of 10 business days prior to the course start date. Course cancellations must be received by fax, e-mail or letter.
- A charge of 50% of the total course fees will be incurred where a customer cancels a course within 10 business days of the course start date.
- Where a participant fails to attend a course, the full fee is incurred.

Facility Address

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