



TRIM Saving a Document – Drag & Drop

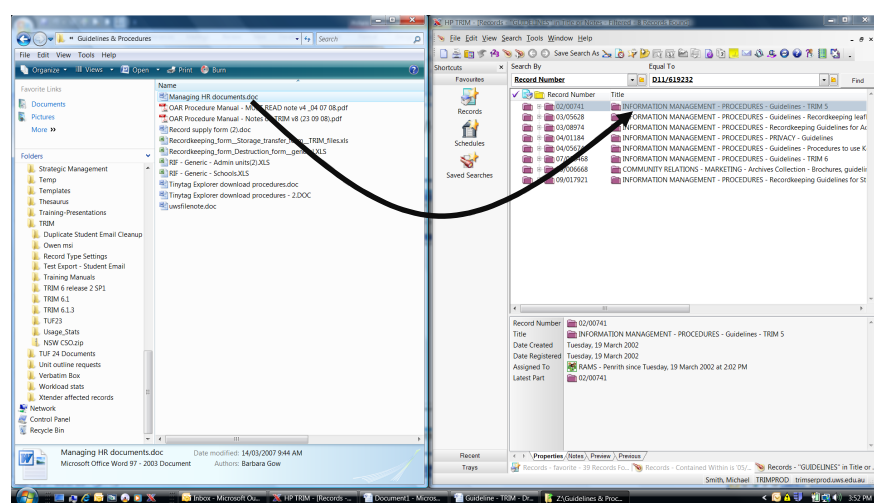
One method of saving a document to TRIM is by dragging and dropping it from the Desktop or a Network Folder onto the relevant file in TRIM.

Locate the document on your PC

Open TRIM and Search for the file to save it to

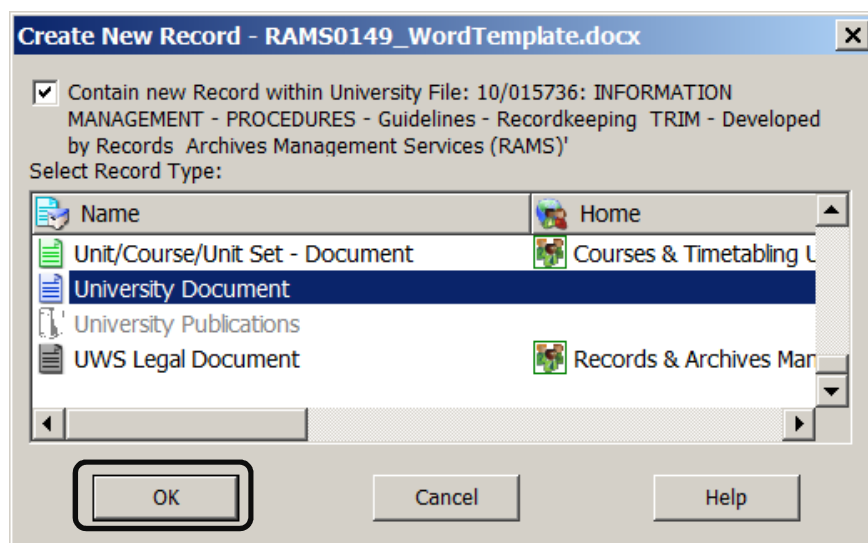
Arrange both windows so they are side by side

Drag and Drop the document to the relevant file in TRIM



Select the **Record Type** you wish to create

Click: **OK**



Enter data in the fields as necessary

Some fields are mandatory:

- *title*
- *file*
- *date created*

Click:

OK

The screenshot shows the HP TRIM software interface for creating a new record. The window title is "HP TRIM - [New Record University Document]". The menu bar includes File, Edit, View, Search, Tools, Window, Help, Dates, and a "123" icon. The search bar is set to "Title Word" and "Equal To". The left sidebar contains a "Recent" list and several icons for navigation: Records, Locations, Classifications, Schedules, Thesaurus Terms, Saved Searches, and Document Queues. The main form has tabs for "General", "Access", "Contacts", "Notes", and "Provenance". The "General" tab is active, showing the following fields: "Title (Free Text Part)" with the value "Managing Records", "Author" (empty), "Addressee" (empty), "Date Created" with the value "24/9/2015" and a time field "4:34:58 PM", and "File Number" with the value "10/015736". Below these fields is an "External ID" field (empty) and a section with four checkboxes: "Contains 'personal information'" (unchecked), "Commercial-in-Confidence" (unchecked), "Vital Record?" (unchecked), and "Enclosed?" (checked). At the bottom right, there are "OK", "Cancel", and "Help" buttons.