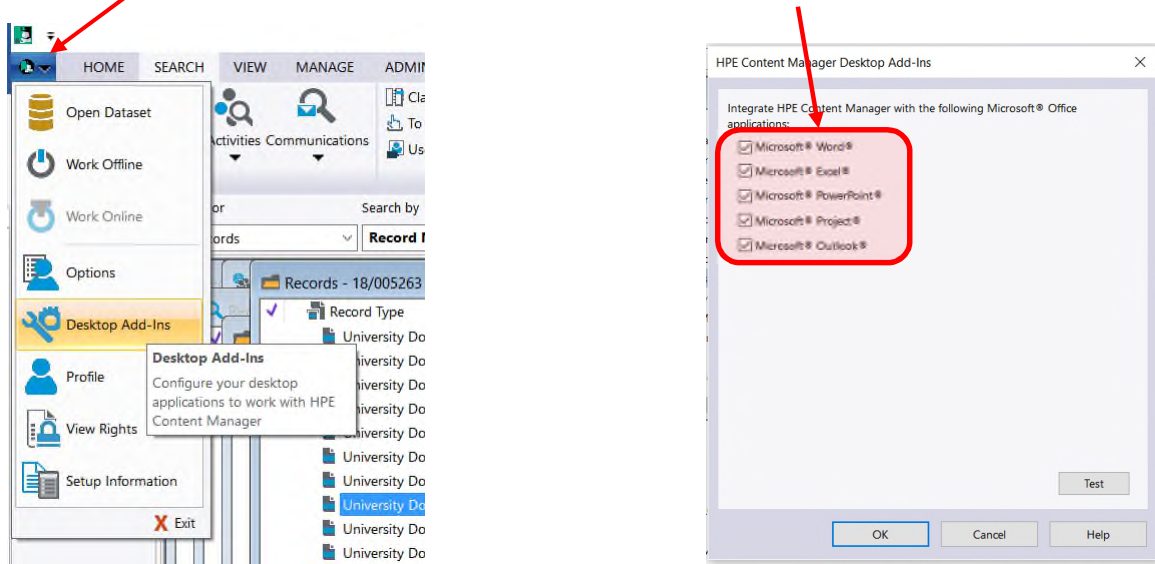


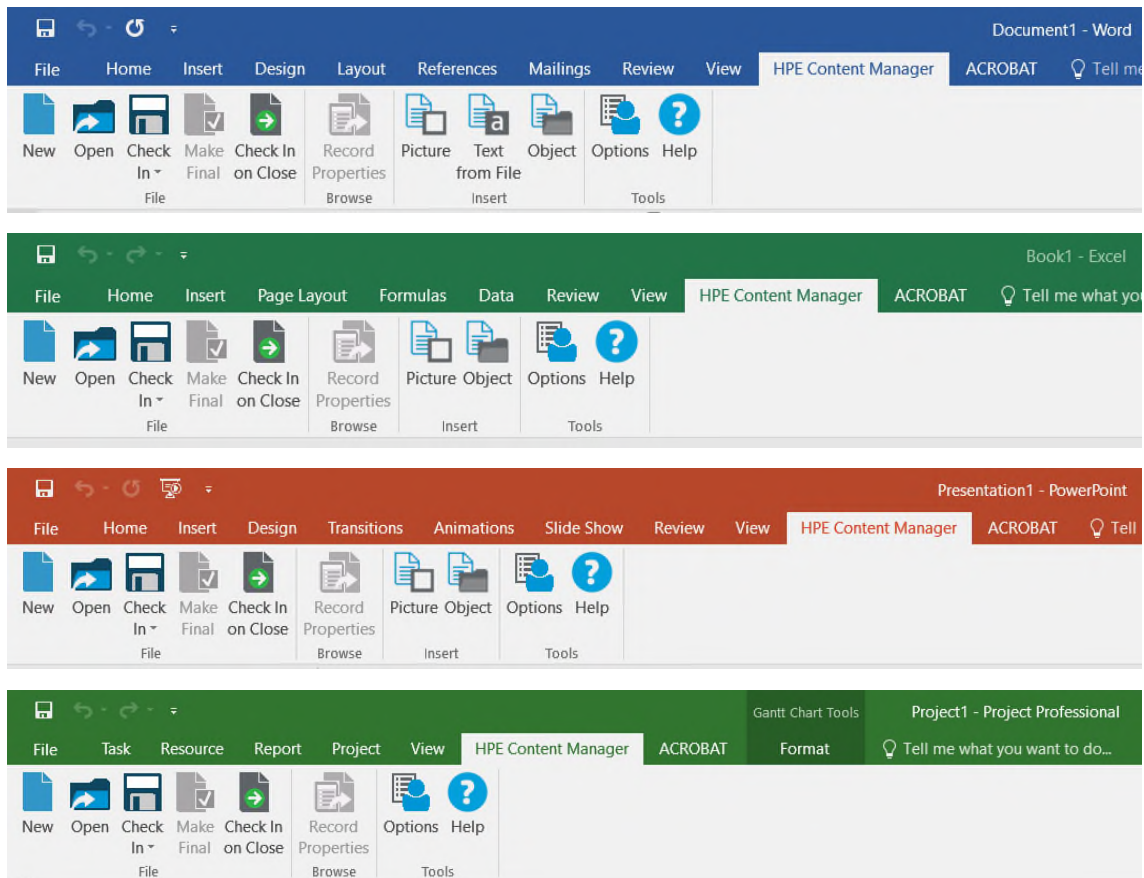
## TRIM9 – Save a MS Office Document to TRIM (Word, Excel, PowerPoint, Project)

TRIM integrates with Microsoft Office desktop applications through Add-ins, enabling you to save documents directly to TRIM. To enable this functionality, you must first open TRIM to configure your desktop applications.

From the **FILE** dropdown, select Desktop Add-ins. Check all **applications** you use with TRIM.



The MS Office applications will now have an HPE Content Manager (TRIM) tab on the ribbon.



## TRIM9 – Save a MS Office Document to TRIM (Word, Excel, PowerPoint, Project)

It contains the commands:

- **New** - click to select a document template from TRIM and create a new record based on the selected template.
- **Open** - to open a document from TRIM.
- **Check In** - to save a document to TRIM.
- **Make Final** - makes this document revision the final revision.
- **Check In on Close** - click to automatically check the document into TRIM when it is closed.
- **Record Properties** - displays the TRIM record properties of the current document
- **Picture** - to insert a picture from TRIM in a Word, PowerPoint or Excel file. TRIM searches for pictures using default criteria which you can change.
- **Text from File** - to insert text from an electronic document in TRIM. TRIM searches for text documents using default criteria which you can change.
- **Object** - to insert an object from an electronic document in TRIM. TRIM searches using default criteria which you can change.
- **Options** - click to turn on or off the Options pane. This allows you to configure the default settings of the Office Integration.

**Note:** If the default record type property is set in the Options pane and you attempt to check in to HPE Content Manager, you will be taken directly to the record entry form. To override the default record type, you can hold down the shift key when clicking the **Check In** button, you will then be prompted to select a record type. If no default is set, you will be prompted to select a record type every time you check in.

The following pages contain RAMS guidelines for saving a new Word document to TRIM for the first time.

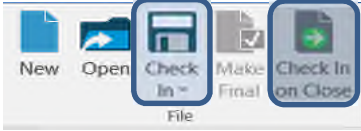
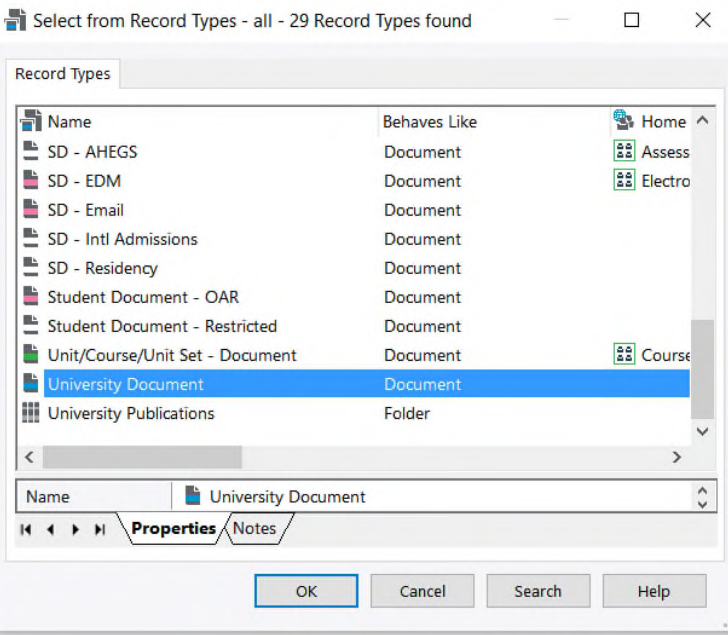
If you need assistance at any time, please contact RAMS [rams@westernsydney.edu.au](mailto:rams@westernsydney.edu.au)

## TRIM9 – Save a MS Office Document to TRIM (Word, Excel, PowerPoint, Project)

### Save a Word document to TRIM

You must have a folder to save the document to. (See D18/783136 Create a New Folder).

Create a new Word document (or open one from a network folder or desktop).

<p>When finished, save it to TRIM - Click <b>Check In</b> or <b>Check In On Close</b></p>	
<p>Select the <b>type of record</b> and click <b>OK</b></p> <p><b>University Document</b> (not related to a specific student) or <b>Student Document</b> (see D17/626366 for Student Document Types)</p>	
<p>Give your document a meaningful title, one that is self explanatory and will be easily identified in the future.</p> <p>Enter the <b>Folder Number</b> it is to be saved in.</p> <p>Click <b>OK</b> to save the Word document to TRIM.</p>	