



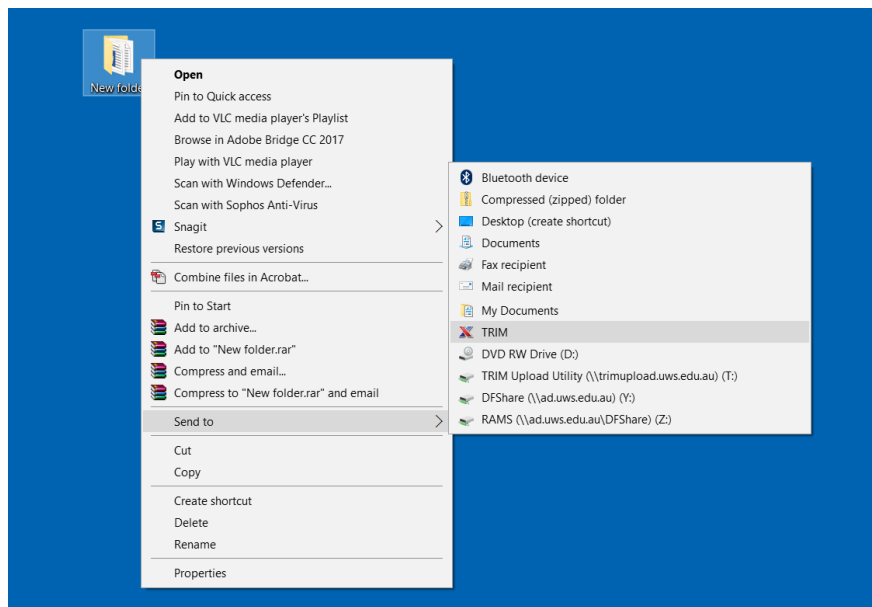
TRIM: Saving Multiple Documents from a Network Folder (Right-click>Send to method)

Records held in a network folder can be saved to TRIM using a document queue as follows:

Locate or create a TRIM file (to match the network folder on your hard drive)

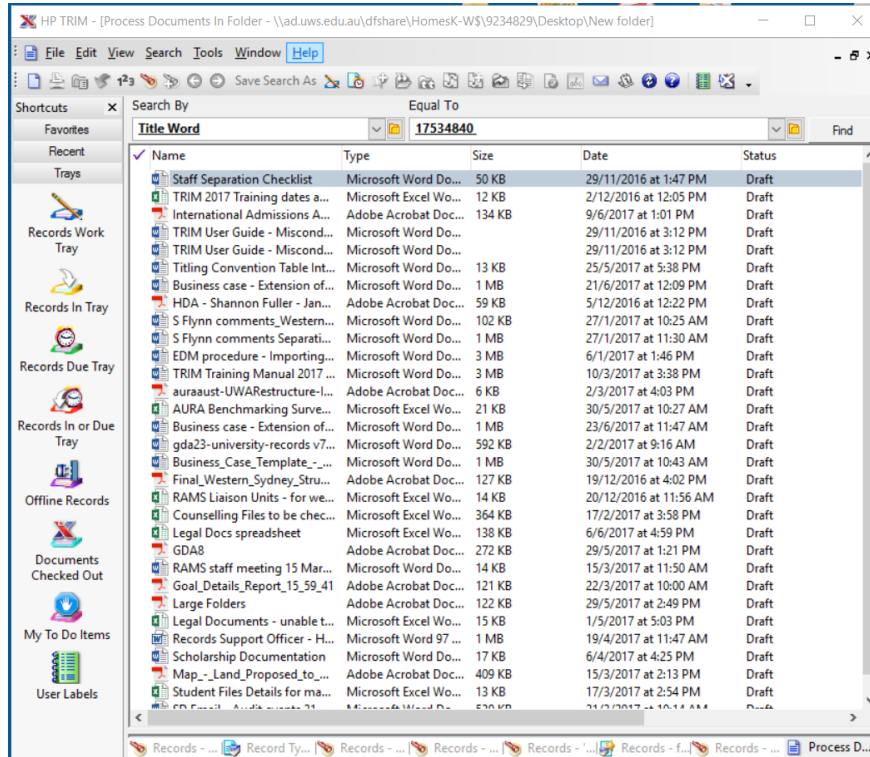
Select network folder

Right-click>
Send to>
TRIM



The documents within the network folder will appear in a new window in TRIM.

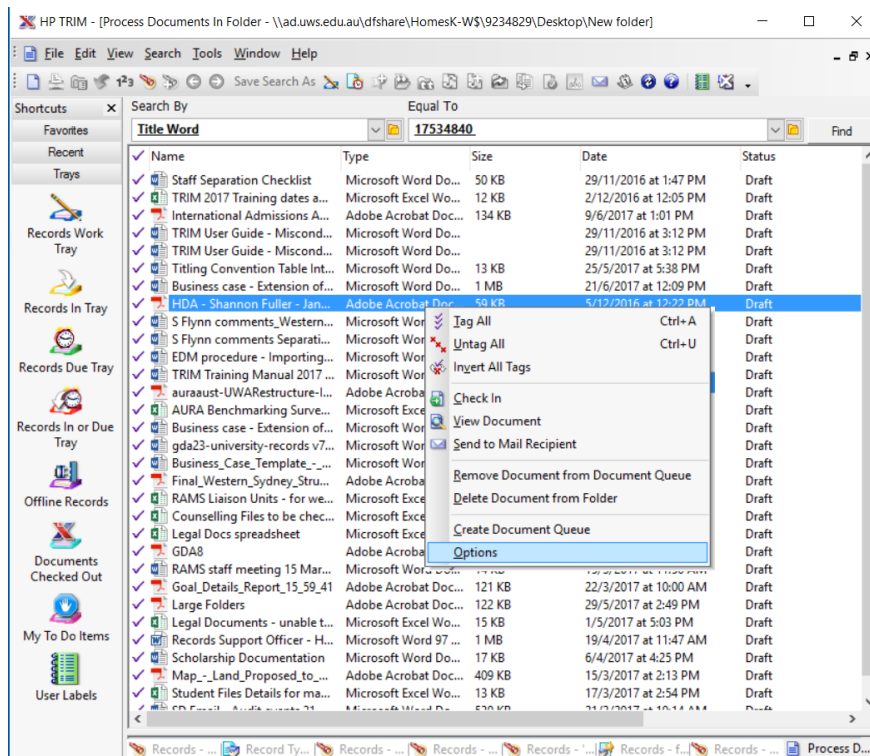
This is called a **Document Queue**



Right-click>
Tag All the
documents

Then

Right-click>
Options



Set your
Default Record Type.

Enter the TRIM folder/file number
Default Container

It is recommended to tick
Display a data entry form^...

Ask your Records Support Officer for advice in regards to not ticking this.

You should also consider
Delete document after it has been processed

(this will delete it from the Network folder after it is saved to TRIM)

Click OK

HP TRIM Options

Dropped Files Dropped Folders

Default Record Type

University Document

Default Container

17/009974

☐ Confirm check in action before continuing

☒ Display a data entry form when creating a new Record

If document is a Windows file:

☐ Delete document after it has been processed

If document is an E-mail message:

Update the E-Mail message with an 'In HP TRIM' indicator

OK Cancel Get Global Help

YOU MUST RESET YOUR TRIM OPTIONS AFTER ALL DOCUMENTS ARE PROCESSED

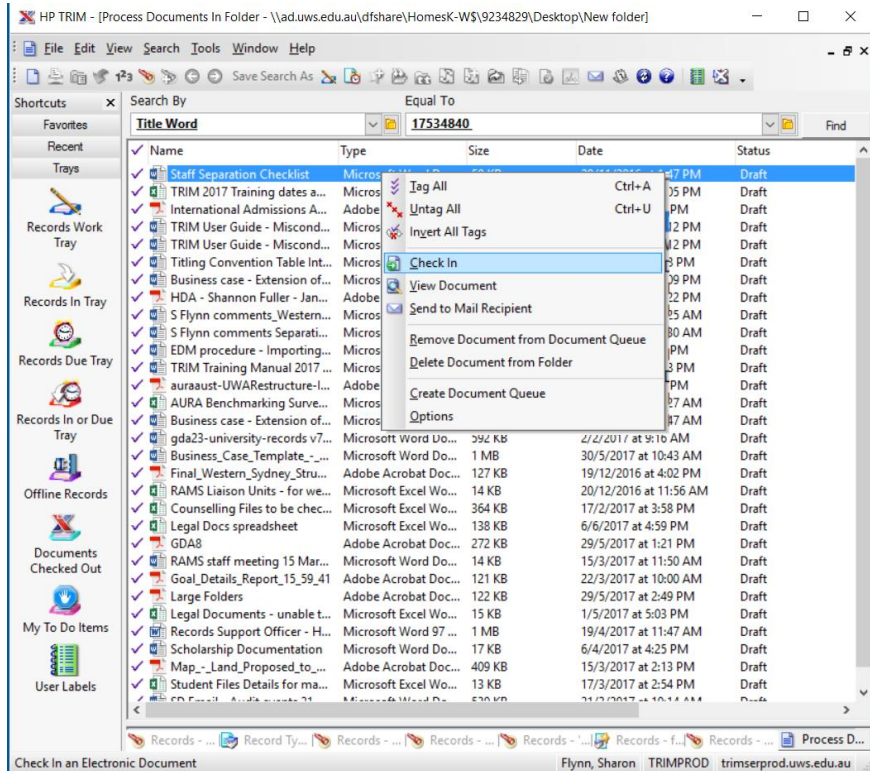
Instructions at the end of this guideline

Right-Click>

Tag All the documents

Right-Click>

Check In



A

^Data Entry Form

will open for each document if selected in your default options

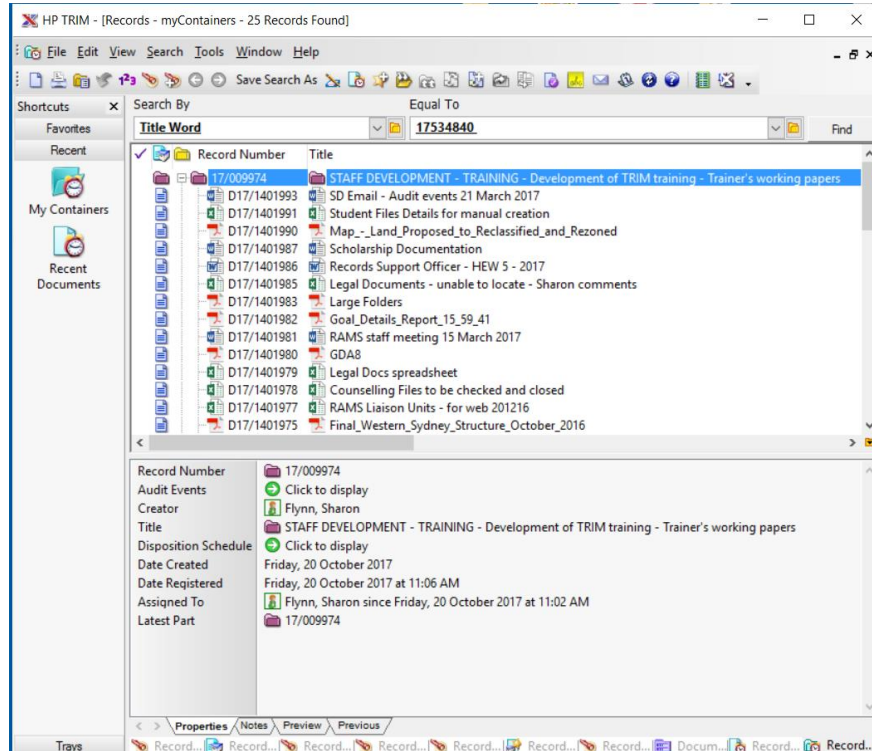
Correct any details as necessary then click **OK** for each document.

Note: The **File Number** field will default to the file selected in your default options. However, you should check the title and dates are accurate.

A screenshot of the 'New Record University Document' form. The form has tabs for 'General', 'Access', 'Contacts', 'Notes', and 'Provenance'. The 'General' tab is active, showing fields for 'Title (Free Text Part)' (containing 'Staff Separation Checklist'), 'Author', 'Addressee', 'Date Created' (29/11/2016 1:47:05 PM), 'File Number' (17/009974), and 'External ID'. There are also checkboxes for 'Contains personal information', 'Commercial-in-Confidence', 'Vital Record?', and 'Enclosed?'. The 'Enclosed?' checkbox is checked. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

You can now close the window in TRIM.

The documents are contained in the relevant file.



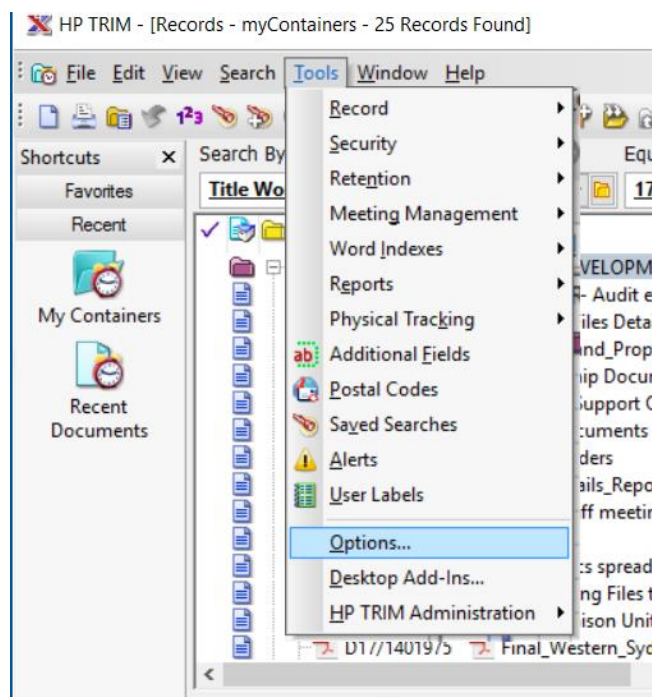
REMEMBER TO RESET YOUR OPTIONS BEFORE PROCEEDING

Instructions following

To reset you default options

From the Tools menu, select

Options



Select the
Dropped Files
tab

Clear the
Default Record
Type
And
Default
Container

Click OK

The screenshot shows the 'HP TRIM Options' dialog box with the 'Dropped Files' tab selected. The dialog has a title bar with standard window controls. Below the title bar is a tabbed interface with the following tabs: 'Locale', 'Spelling', 'Search', 'Search Result', 'Viewer', 'Store Caching', 'E-mail', 'Startup', 'Reporter', 'Dropped Files' (active), 'Dropped Folders', and 'Integration'. The 'Dropped Files' tab contains the following settings:

- 'Default Record Type': A text input field with a dropdown arrow and a folder icon.
- 'Default Container': A text input field with a dropdown arrow and a folder icon.
- 'Confirm check in action before continuing': An unchecked checkbox.
- 'Display a data entry form when creating a new Record': A checked checkbox.
- 'If document is a Windows file:':
 - 'Delete document after it has been processed': An unchecked checkbox.
- 'If document is an E-mail message:': A dropdown menu showing 'Update the E-Mail message with an 'In HP TRIM' indicator'.

At the bottom of the dialog are four buttons: 'OK' (highlighted with a blue border), 'Cancel', 'Get Global', and 'Help'.