

### Moving Multiple Documents to TRIM

This document is designed to assist staff with the function of transferring multiple documents into TRIM.

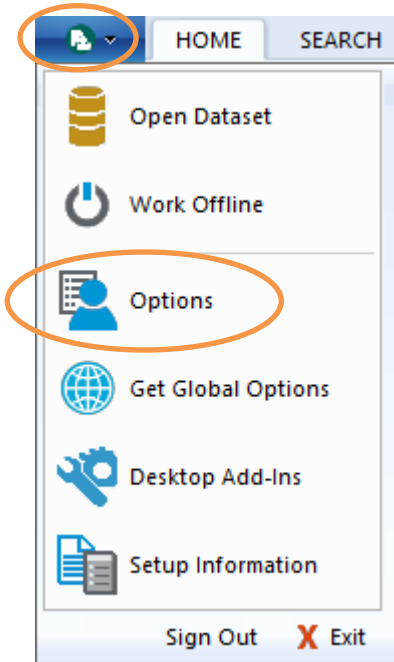
There are various ways to transfer multiple documents to TRIM, and several different options that can be set. This document will explain the simplest way to transfer multiple documents.

It is best to ensure that the documents are titled well prior to transferring them to TRIM. This will allow you to transfer the documents to TRIM without having to fill in the Record Entry Form for each document.

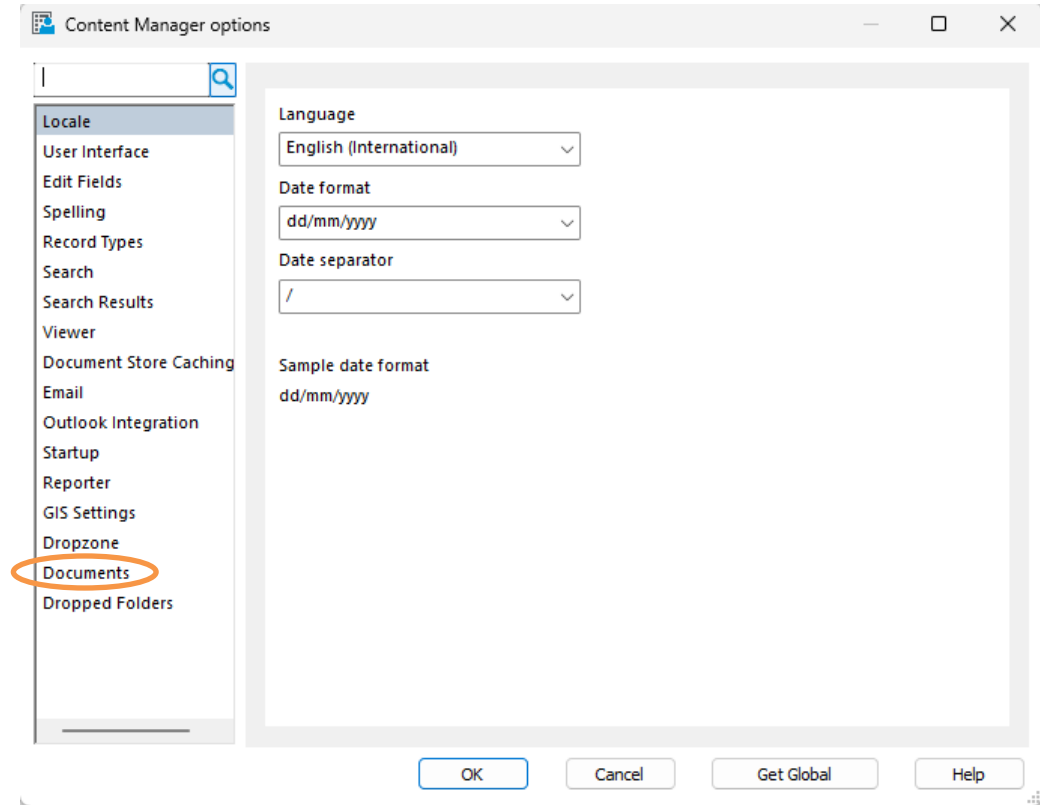
**Note:** If necessary, you can always re-title the documents once they have been transferred to TRIM.

Begin by setting the Options:

1. Select the **FILE** button at the top left of the TRIM screen, then select **Options**:

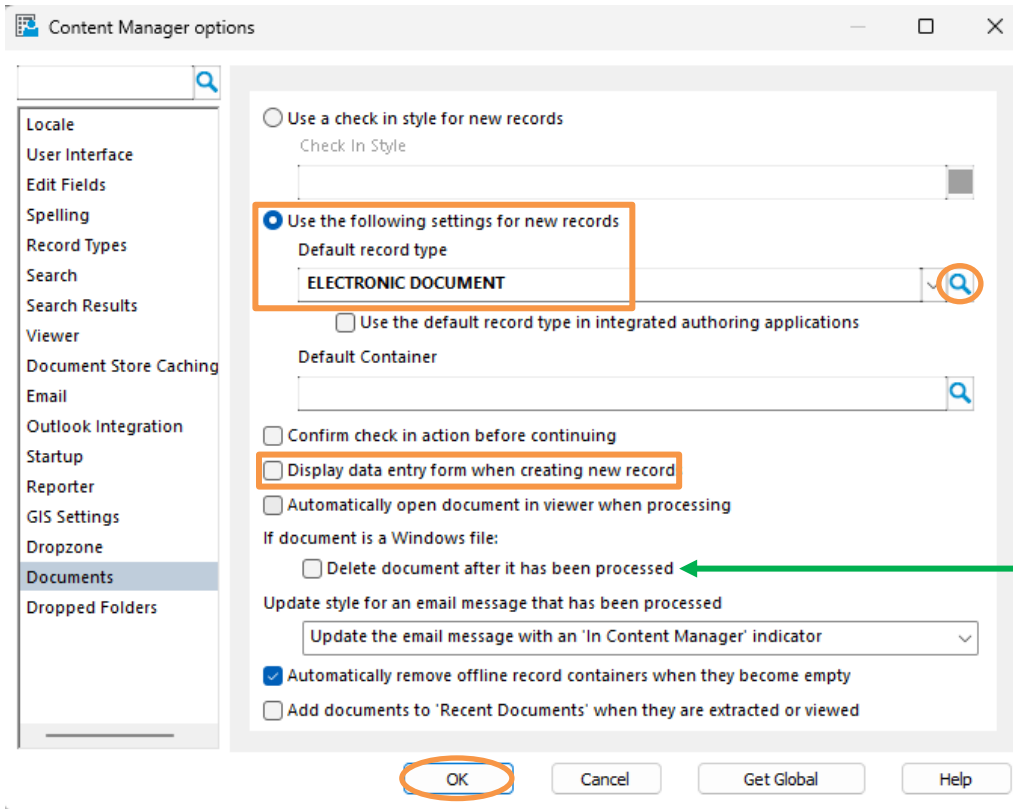


2. When the 'Content Manager options' window appears, select **Documents**:



- Use the **Magnifying Glass** button to select **ELECTRONIC DOCUMENT** in the 'Default record type' field, then remove the tick from the 'Display data entry form when creating new records' checkbox:

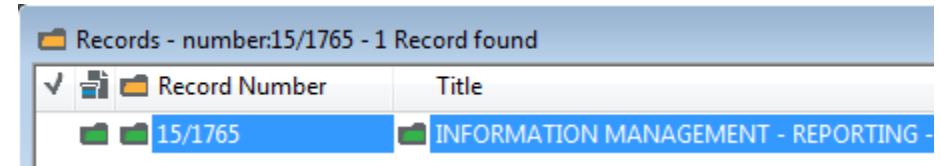
**Note:** Removing this tick will process the documents with their existing title:



**Hint:** If you want to delete the document from wherever it is located after it has been processed into TRIM, place a tick in the checkbox called 'Delete document after it has been processed'.

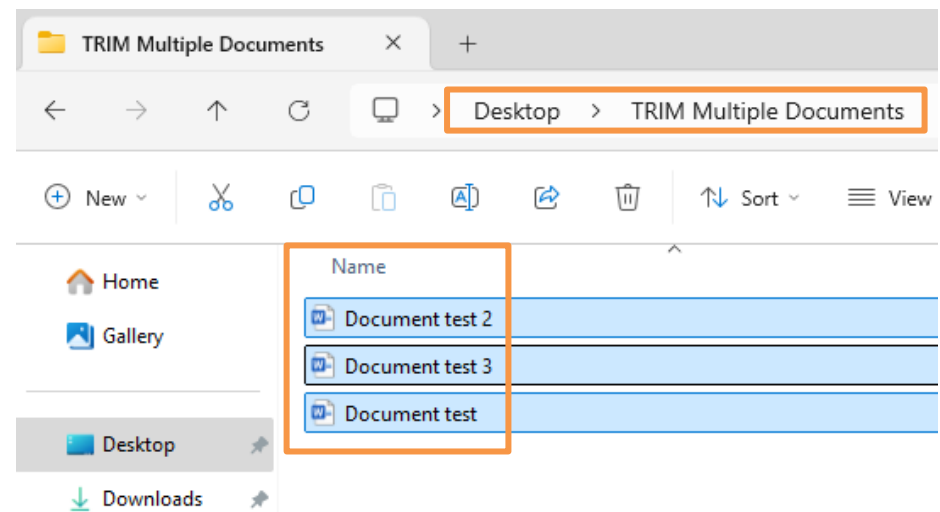
**Note:** If you don't delete the document once it has been processed then you should ensure you have some process in place to allow you to clearly identify which documents have been processed into TRIM, and which have not.

- Click **OK** to close the 'Content Manager options' window (refer above screenshot).
- Locate the destination folder in TRIM that you want to move the documents to:



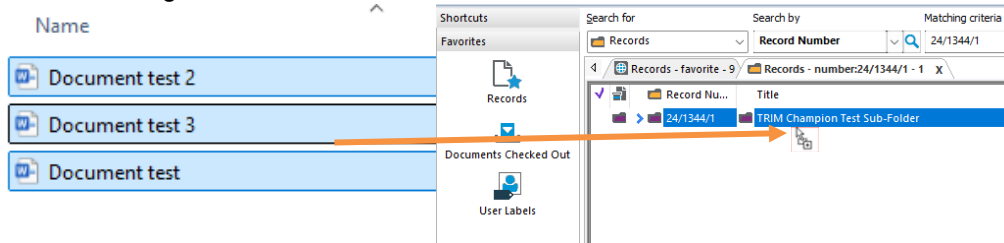
- Navigate to the location on your computer where the documents which you want to transfer into TRIM are located (refer below screenshot):
- Select the documents you want to store in TRIM (refer below screenshot):

**Note:** Select only the documents that are to be stored in the same TRIM folder:

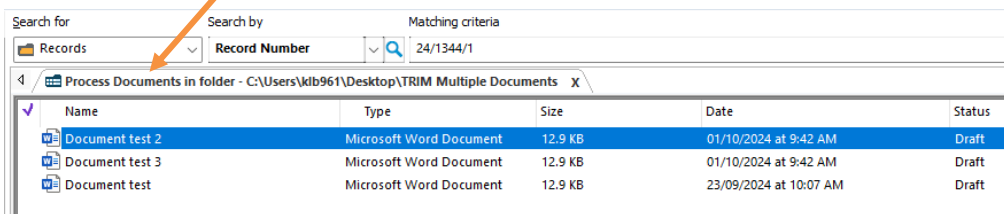


8. Drag the documents into TRIM and drop them on the destination folder:

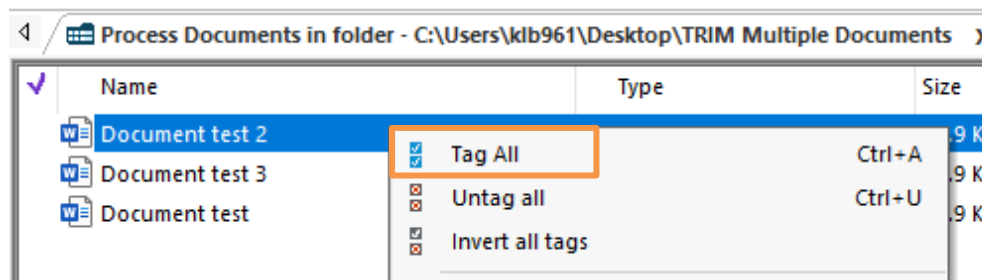
**Note:** Drop the documents when the selected folder highlights and you see the + sign:



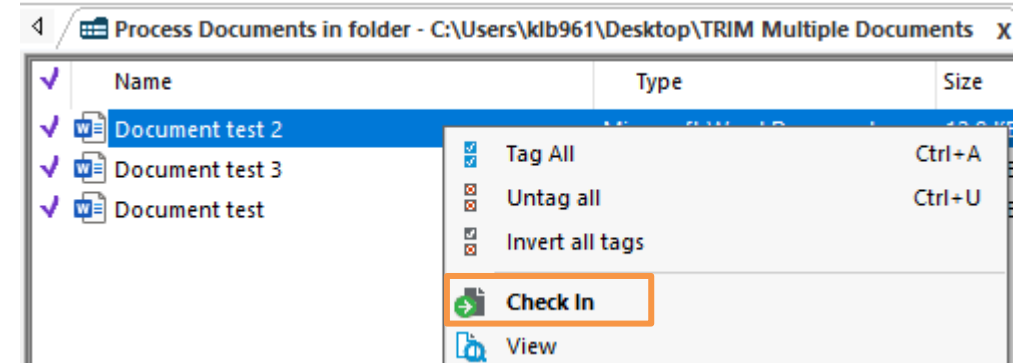
**Note:** When the documents are dropped TRIM will create a document queue and a 'Process Documents in folder' window will be displayed with all the dropped documents listed (refer below):



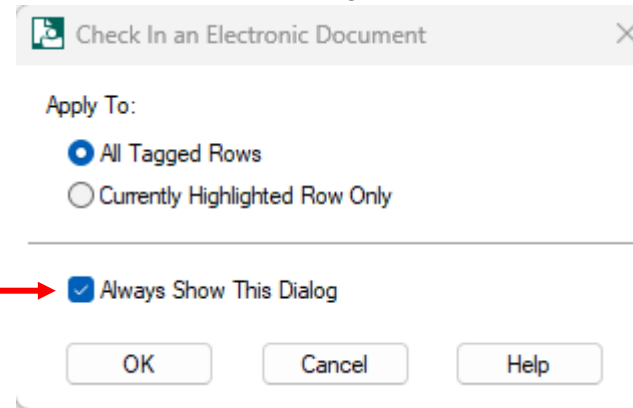
9. **Right-click** on any of the documents → **Tag All** (this will place a tick to the left of each document):



10. **Right-click** → **Check In**

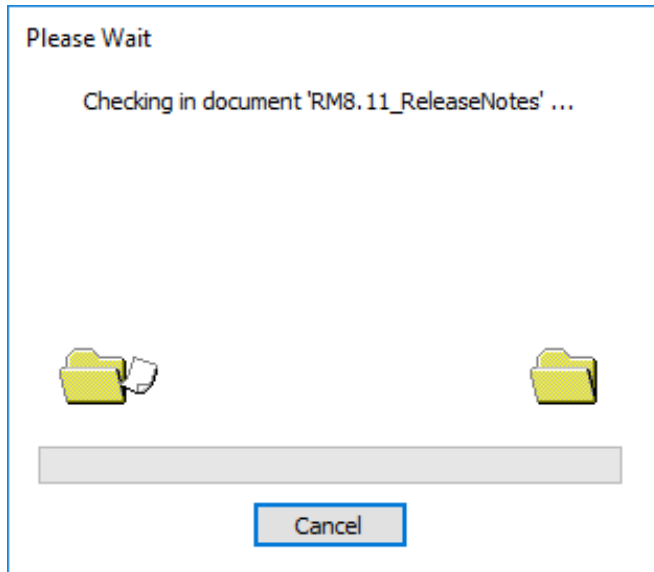


11. A pop-up window like the one shown below will display. Ensure 'All Tagged Rows' is selected and click OK:



**Note:** You can choose to have this dialog show every time you perform an action relating to multiple rows or you can choose not to have the dialog show by unticking the box 'Always Show This Dialog'.

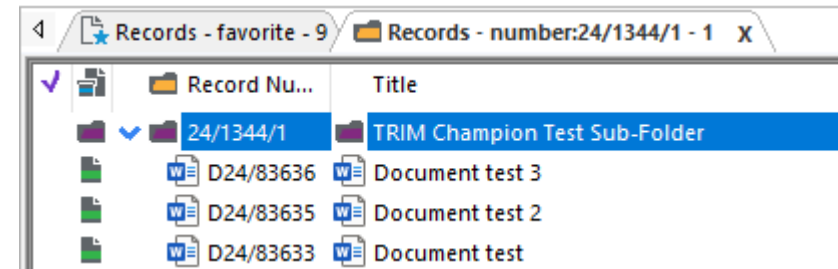
12. A message like the one shown below will display while the documents are processing:



As the documents are processing the **'Status'** column will change from 'Draft' to 'Original':

Name	Type	Size	Date	Status
Document test 2	Microsoft Word Document	12.9 KB	01/10/2024 at 9:42 AM	Original
Document test 3	Microsoft Word Document	12.9 KB	01/10/2024 at 9:42 AM	Original
Document test	Microsoft Word Document	12.9 KB	23/09/2024 at 10:07 AM	Original

13. Once the **'Status'** column shows that all the transferred documents are now 'Original' you will be able to navigate to the destination folder and see that all the documents you dragged and dropped from your computer are now in the TRIM folder (if they are not displaying, press **F5** on your keyboard to refresh the TRIM screen):



**REMEMBER:** Once you are finished moving multiple documents to TRIM, remember to go back and set any **Options** you changed (in Steps 1 to 4 at the beginning of this Guide) back to the default settings. E.g. If you have selected to delete documents from your computer after they are transferred to TRIM, then this option will continue to remain for all documents transferred until the setting is changed back.