
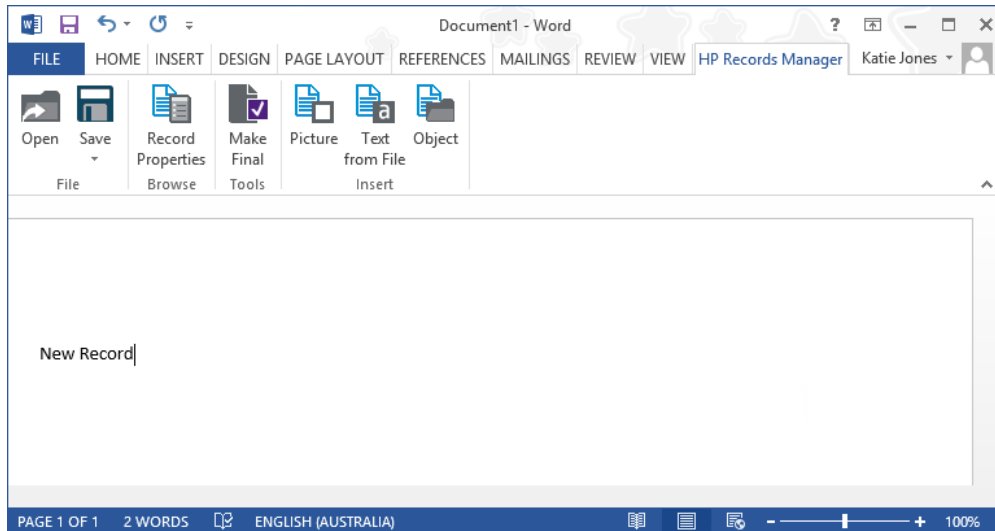
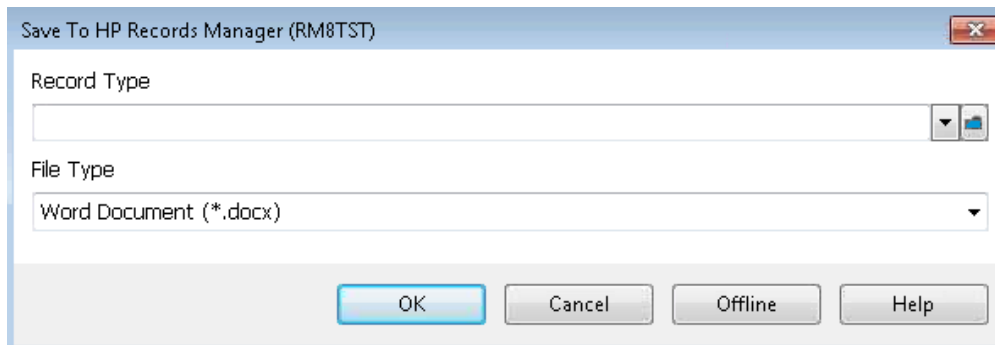


Saving a Document

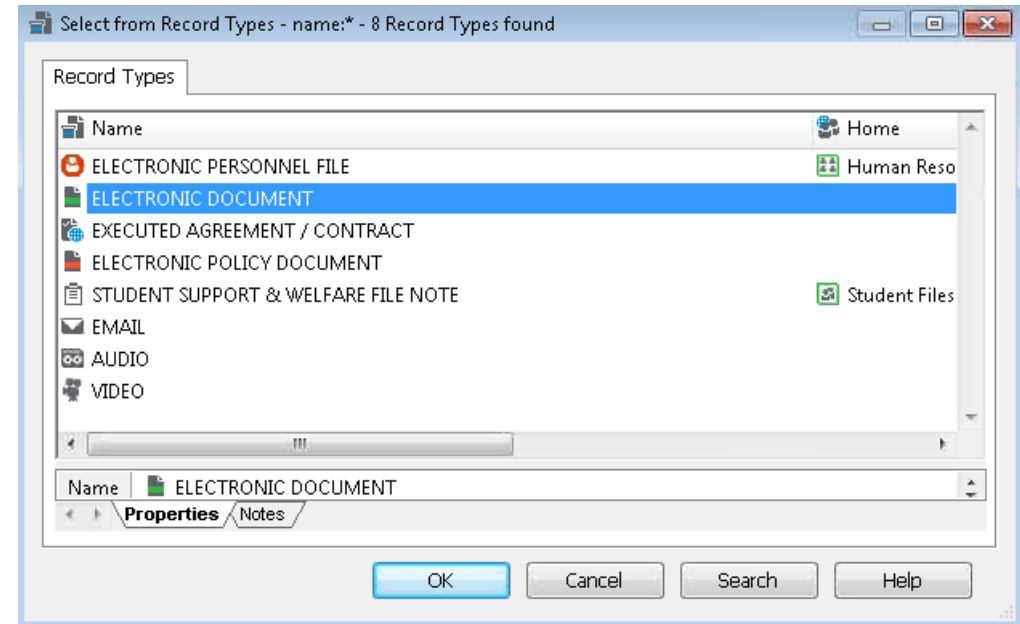
1. Open MS Word (Excel or PowerPoint). Create a document select the "HPE Records Manager" (TRIM) ribbon, select **Save**. 



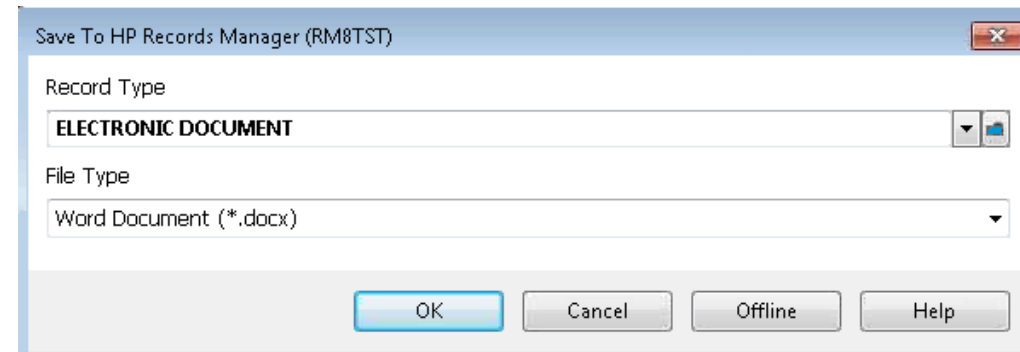
2. The "Save to HPE Records Manger" (TRIM) window will appear. Select the blue KwikSelect button to choose an appropriate **Record Type**.



3. Select the correct Record Type from the available list in this case highlight **Electronic Document** and select **OK**.

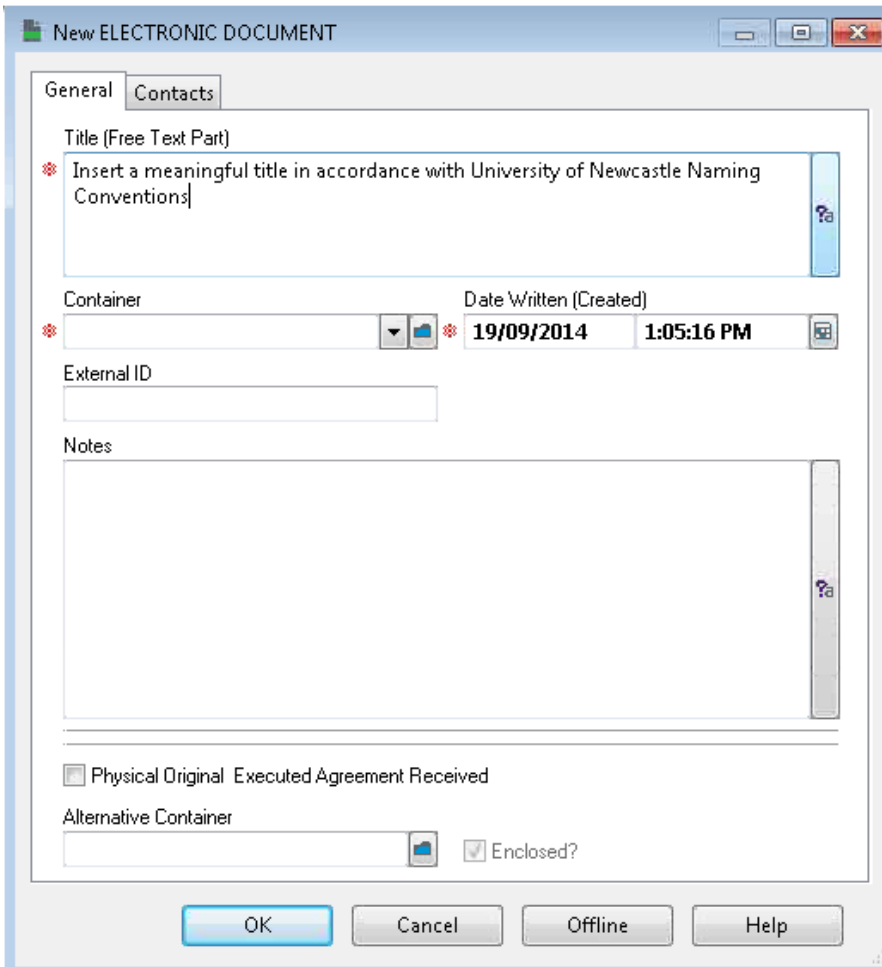



4. The **Record Type** will be displayed in the window below. Change the **File Type** if required.



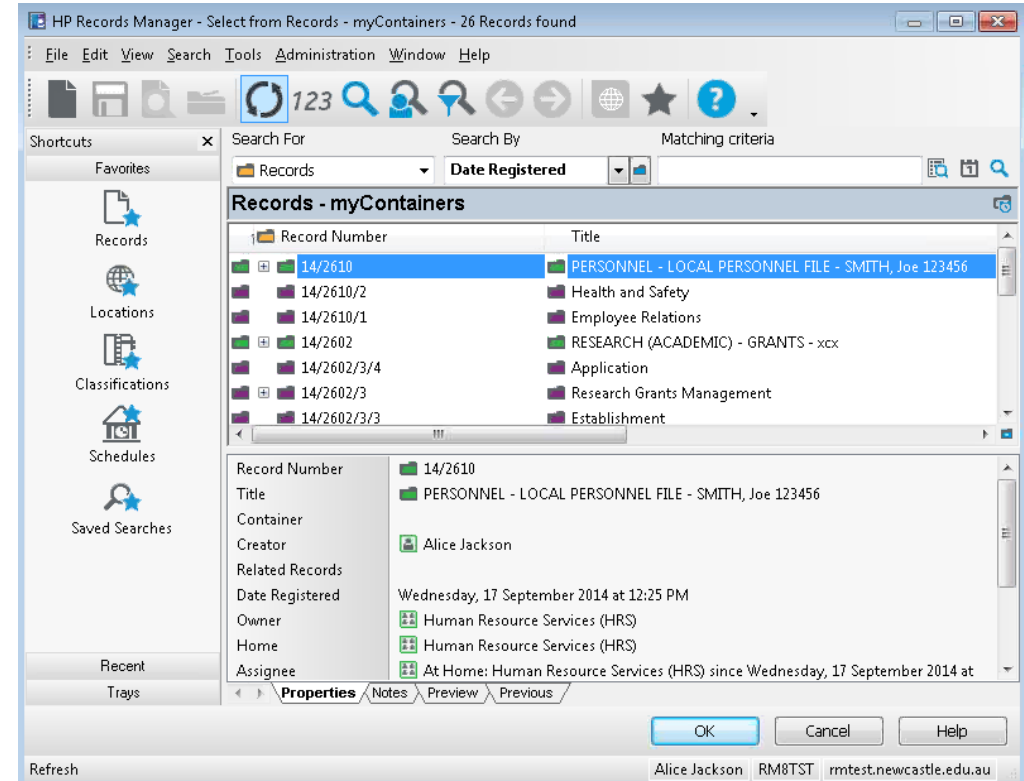
5. Select **OK**.

6. Complete the **Record Entry Form**, those marked with a ***(red asterisk)** must be completed.




7. Select the blue KwikSelect button  to search or navigate to a File or Sub Folder (the screen below will appear). Highlight the File or Sub Folder and select **OK**.

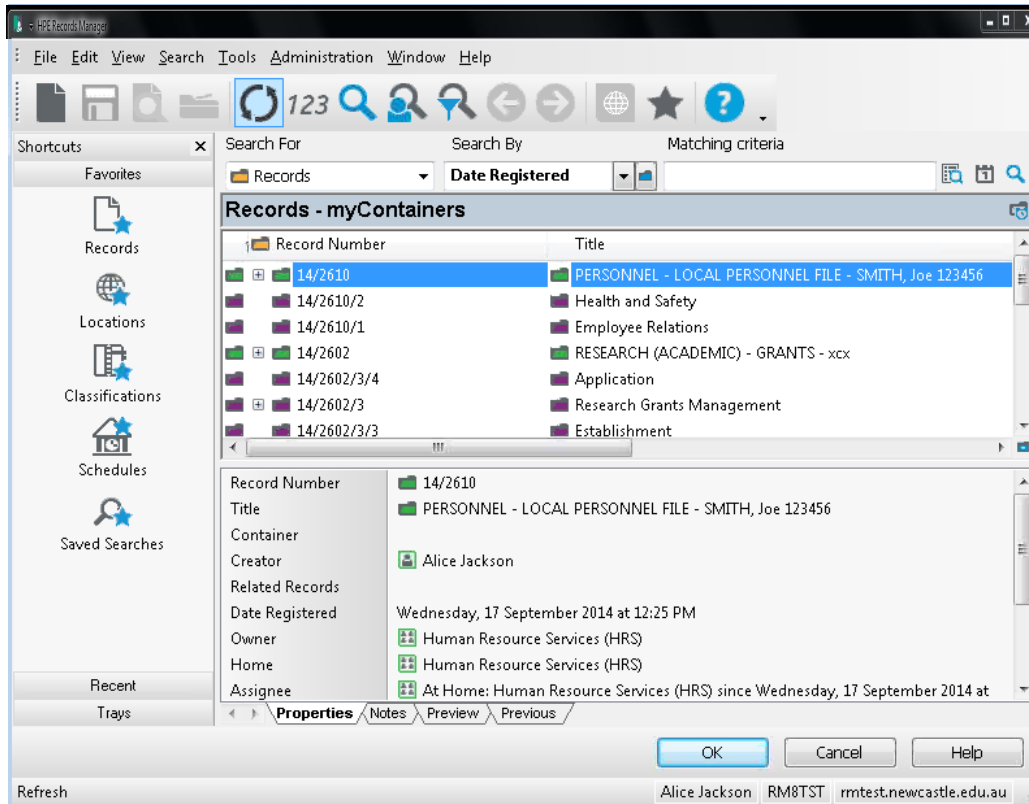
Note! When selecting a File or Sub Folder, the starting point defaults to your **Recent Files / Sub Folders**. Use **F4** to add Files / Sub Folders to your Favourites.



8. Enter any additional metadata i.e. **Notes** about the Document.

9. Select the blue KwikSelect button  to search or navigate to an alternate File or Sub Folder (the screen below will appear). Highlight the File or Sub Folder and select **OK**.

Note! The **Alternative Container** field allows a document to be placed into an additional or alternative container. This covers the scenario where a document belongs in two files / sub folders at once. You can have only one container record, but any number of alternative containers.



10. Once all information is entered select **OK**.

Note! You must close the authoring application (e.g. MS Word) before the document will appear in TRIM.