

## Moving multiple documents from shared drives to TRIM

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

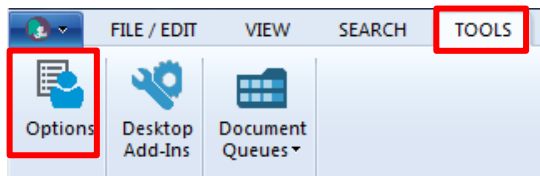
There are various ways to transfer documents from a shared drive to TRIM, and several different options that can be set. This document will explain the simplest way to transfer multiple documents.

It is best to ensure that the documents are named well in the shared drive before attempting to transfer them to TRIM. This will allow you to transfer the document/s to TRIM without having to fill in the Record Entry Form for each document.

**Note:** You can always re-name the documents once they are transferred to TRIM.

The first step is to set the Options in TRIM:

1. Select the **Tools** tab.
2. Click the **Options** button.



*Screenshot to the right pertains to the below steps:*

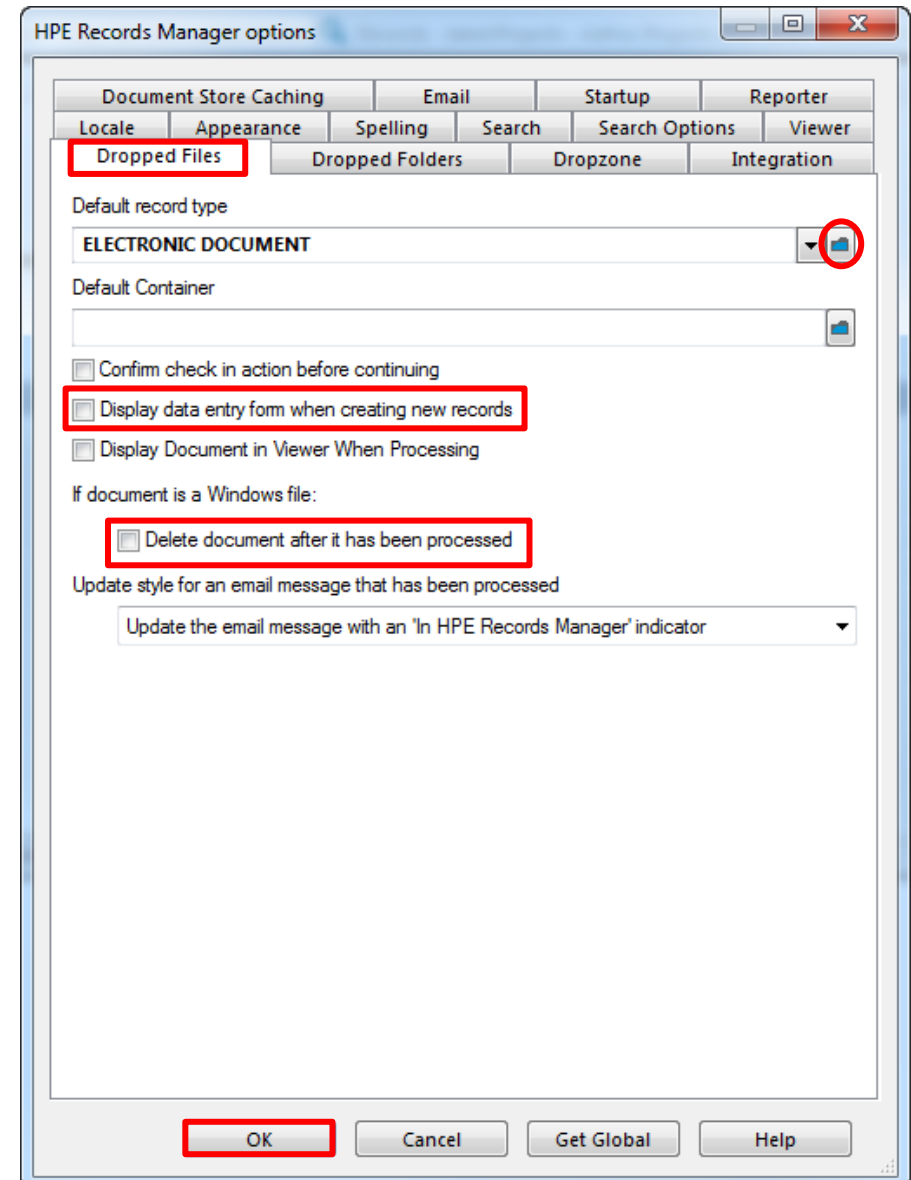
3. Click the **Dropped Files** tab.
4. Use the **Kwik-select** button to select **Electronic Document** in the 'Default record type' field.
5. Remove the tick from the 'Display data entry form when creating new records' checkbox.

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

6. If you want to delete the document from the drive after it has been processed into TRIM, place a tick in the checkbox called 'Delete document after it has been processed'.

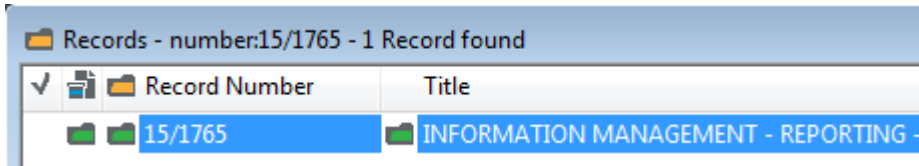
**Note:** if you don't delete the document from the drive once it has been processed then you should ensure you have some process in place to allow you to clearly identify which documents on your drive have been processed into TRIM, and which have not.

7. Click **OK**.



# Moving Multiple Documents from Shared Drives to TRIM

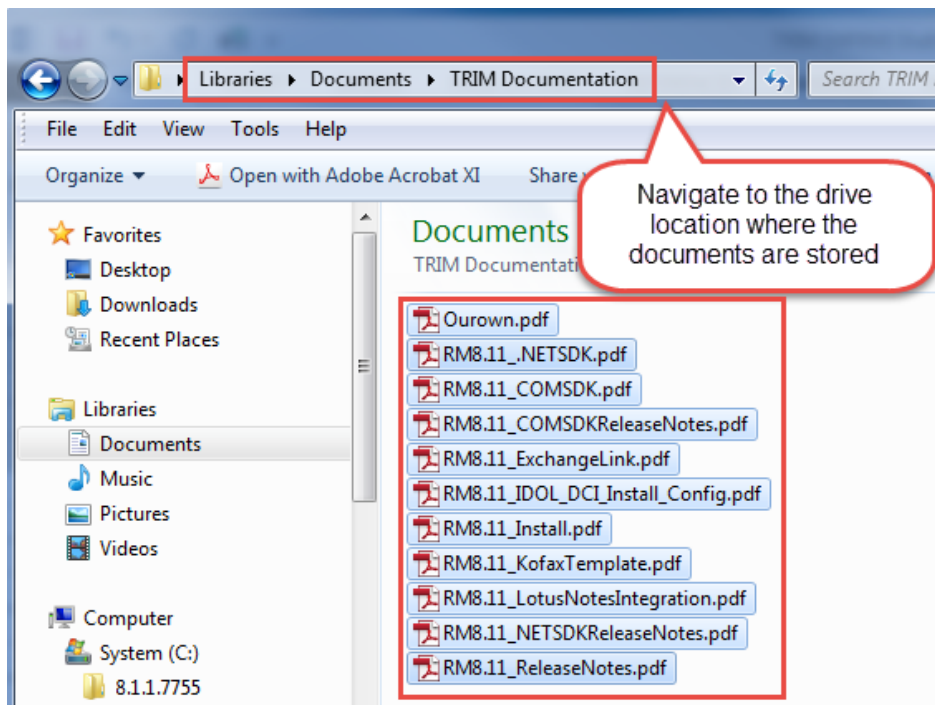
8. Locate the destination folder in TRIM that you want to move the documents to:



9. Navigate to the drive location of the documents you want to transfer (refer below screenshot).

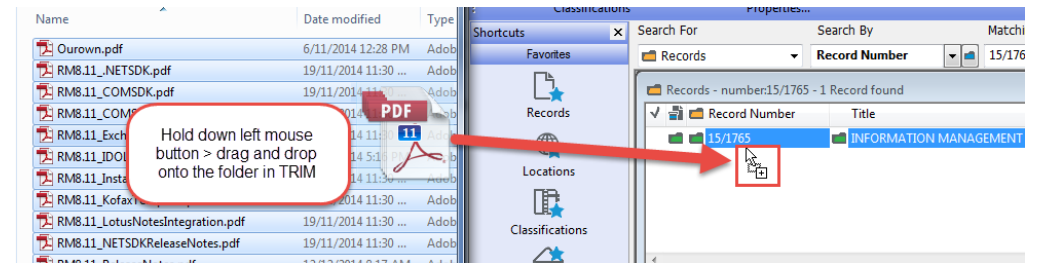
10. Highlight the documents you want to store in TRIM (refer below screenshot).

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

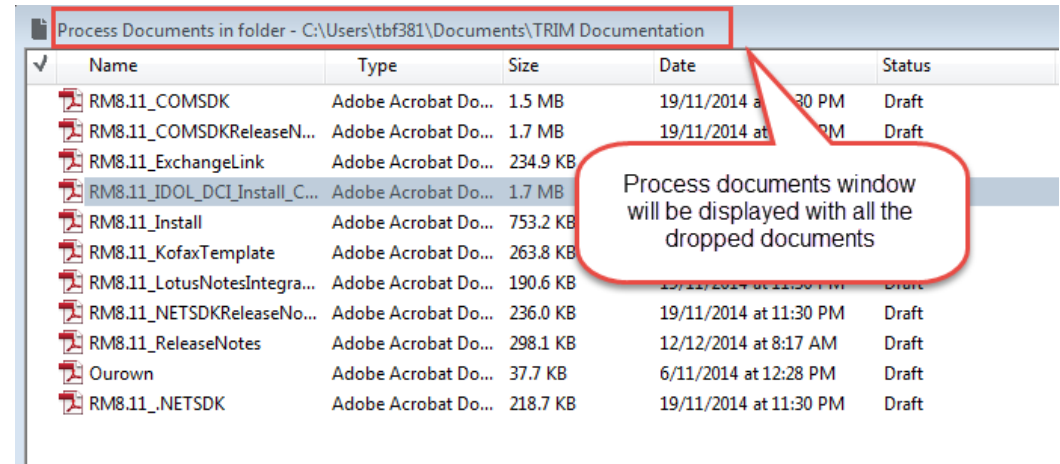


11. Drag the documents into TRIM and drop them on the destination folder.

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

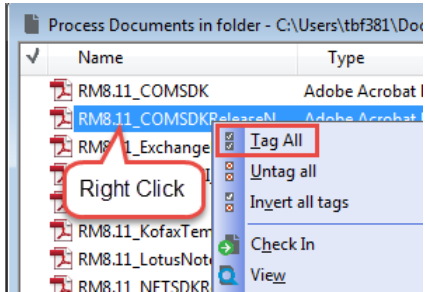


**Note:** When the documents are dropped TRIM will create a document queue and a 'Process Documents in folder' window will be displayed with all the dropped documents listed (refer below):

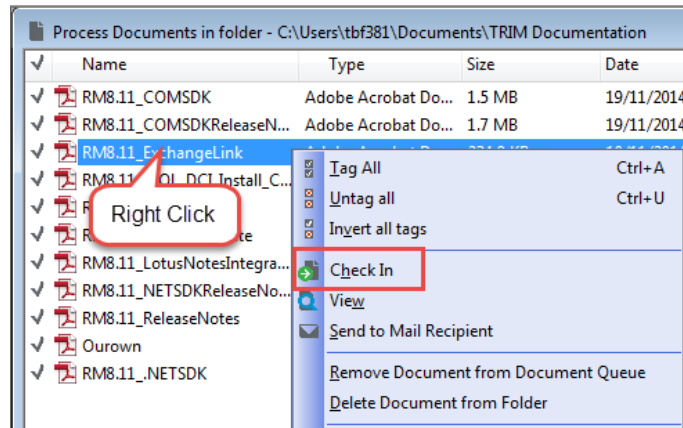


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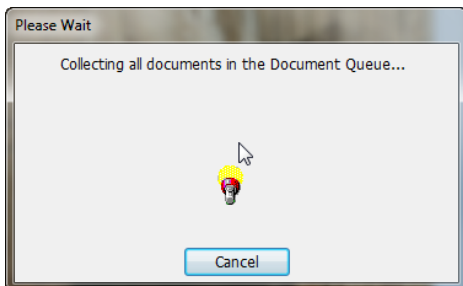
## 12. Right-click on any of the documents → Tag All



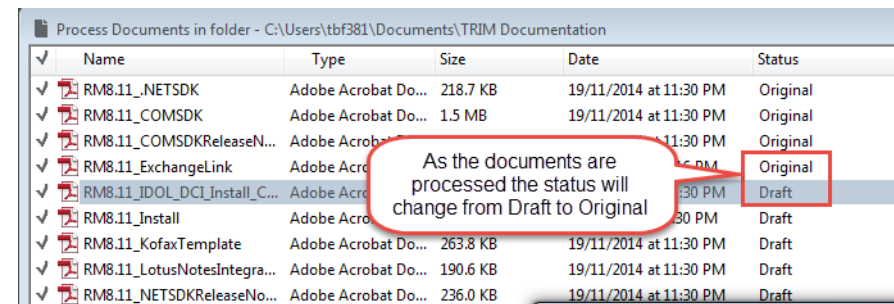
## 13. Right-click → Check In



The below message will be displayed while the documents are processing:

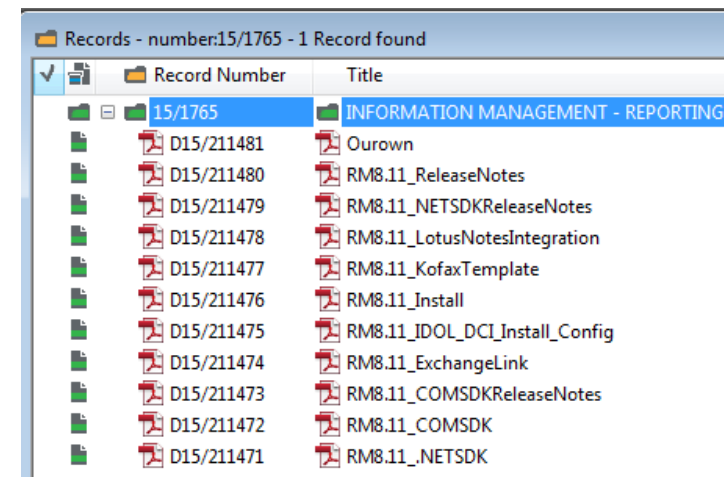


As the documents are processing the 'Status' column will change from 'Draft' to 'Original':



Name	Type	Size	Date	Status
RM8.11_NETSDK	Adobe Acrobat Do...	218.7 KB	19/11/2014 at 11:30 PM	Original
RM8.11_COMSDK	Adobe Acrobat Do...	1.5 MB	19/11/2014 at 11:30 PM	Original
RM8.11_COMSDKReleaseNo...	Adobe Acrobat Do...	1.7 MB	19/11/2014 at 11:30 PM	Original
RM8.11_ExchangeLink	Adobe Acrobat Do...	234.2 KB	19/11/2014 at 11:30 PM	Original
RM8.11_IDOL_DCI_Install_C...	Adobe Acrobat Do...	234.2 KB	19/11/2014 at 11:30 PM	Draft
RM8.11_Install	Adobe Acrobat Do...	234.2 KB	19/11/2014 at 11:30 PM	Draft
RM8.11_KofaxTemplate	Adobe Acrobat Do...	263.8 KB	19/11/2014 at 11:30 PM	Draft
RM8.11_LotusNotesIntegra...	Adobe Acrobat Do...	190.6 KB	19/11/2014 at 11:30 PM	Draft
RM8.11_NETSDKReleaseNo...	Adobe Acrobat Do...	236.0 KB	19/11/2014 at 11:30 PM	Draft

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 the shared drive are now in the TRIM folder (if they are not displaying, press **F5** on your keyboard to refresh the TRIM screen):



Record Number	Title
15/1765	INFORMATION MANAGEMENT - REPORTING
D15/211481	Ourown
D15/211480	RM8.11_ReleaseNotes
D15/211479	RM8.11_NETSDKReleaseNotes
D15/211478	RM8.11_LotusNotesIntegration
D15/211477	RM8.11_KofaxTemplate
D15/211476	RM8.11_Install
D15/211475	RM8.11_IDOL_DCI_Install_Config
D15/211474	RM8.11_ExchangeLink
D15/211473	RM8.11_COMSDKReleaseNotes
D15/211472	RM8.11_COMSDK
D15/211471	RM8.11_NETSDK

**Note:** Once you are finished moving multiple documents to TRIM, remember to go back to the **Tools** tab and then the **Options** button and make any required changes to the settings. E.g. If you have selected to delete documents from your drive after they are transferred to TRIM, then this option will continue to remain for all documents transferred until the setting is changed.