

Moving Multiple Documents to TRIM9

This document is designed to assist staff with the function of transferring multiple documents into TRIM9.

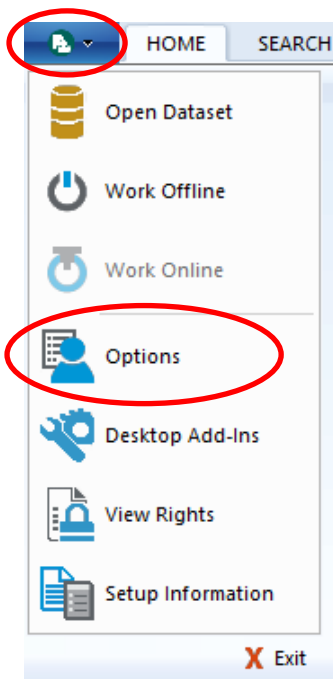
There are various ways to transfer multiple documents to TRIM9, and several different options that can be set. This document will explain the simplest way to transfer multiple documents.

It is best to ensure that the documents are titled well prior to transferring them to TRIM9. This will allow you to transfer the documents to TRIM9 without having to fill in the Record Entry Form for each document.

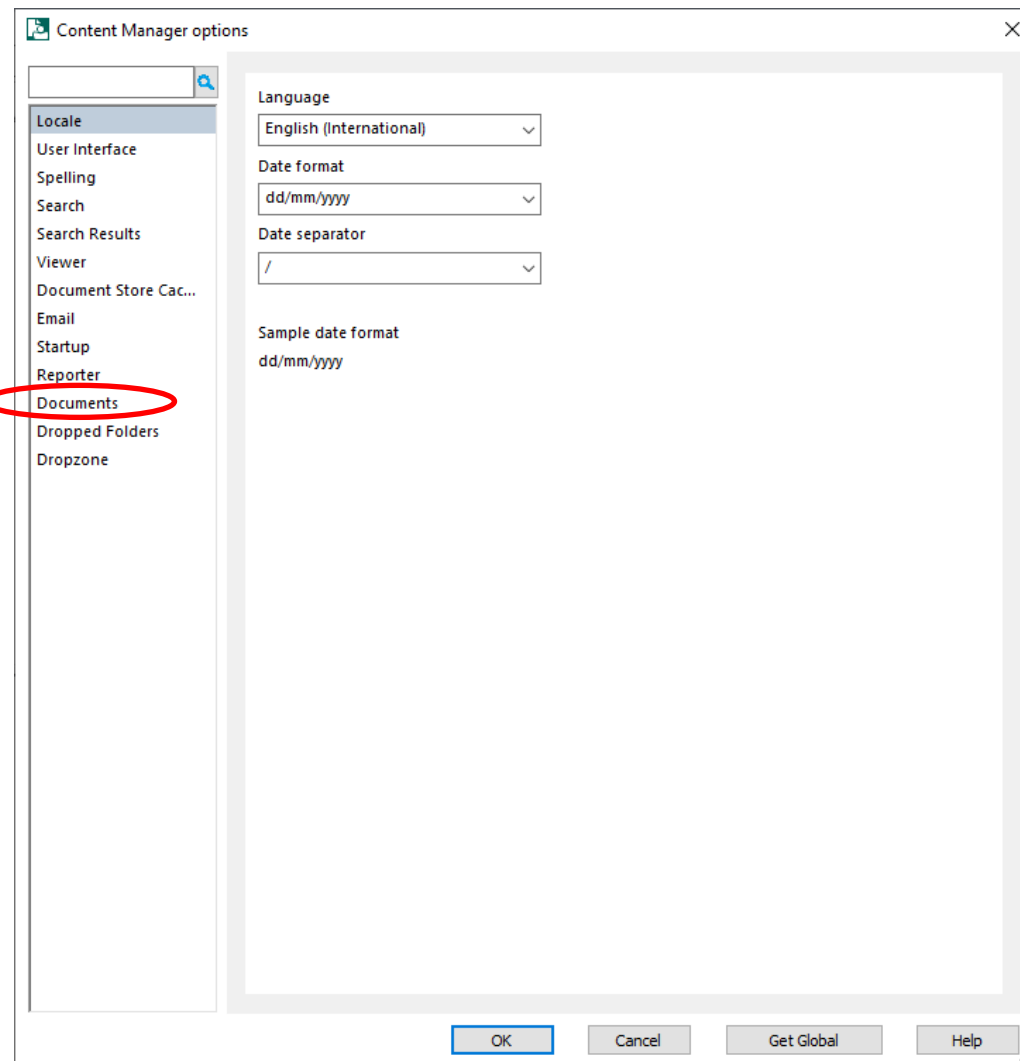
Note: If necessary, you can always re-title the documents once they have been transferred to TRIM9.

Begin by setting the Options:

1. Select the **FILE** button at the top left of the TRIM9 screen, then select **Options**:

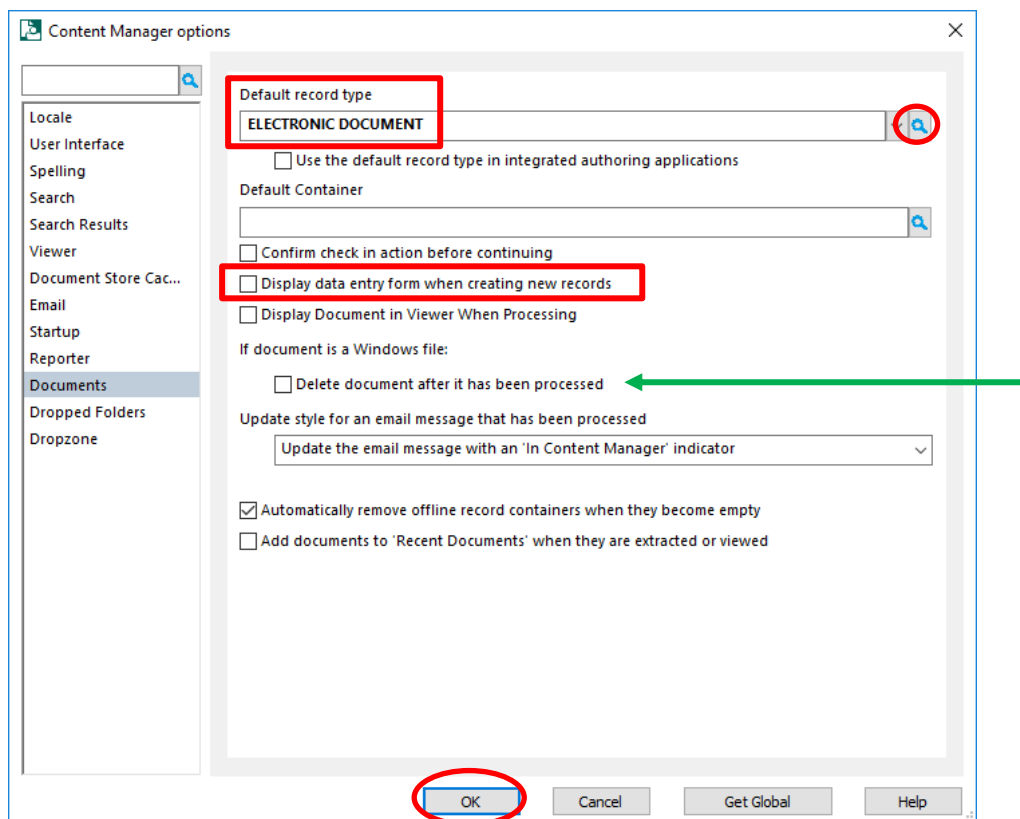


2. When the 'Content Manager options' window appears, select **Documents**:



- 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:

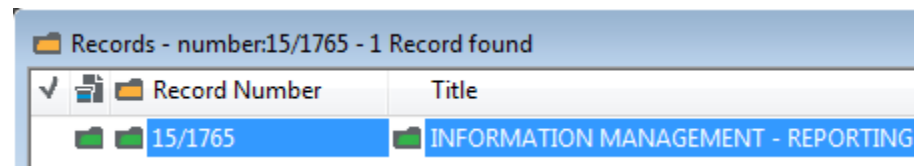


Hint: If you want to delete the document from wherever it is located after it has been processed into TRIM9, place a tick in the checkbox called 'Delete document after it has been processed'.

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 TRIM9, and which have not.

- Click **OK** to close the '**Content Manager options**' window (refer above screenshot).

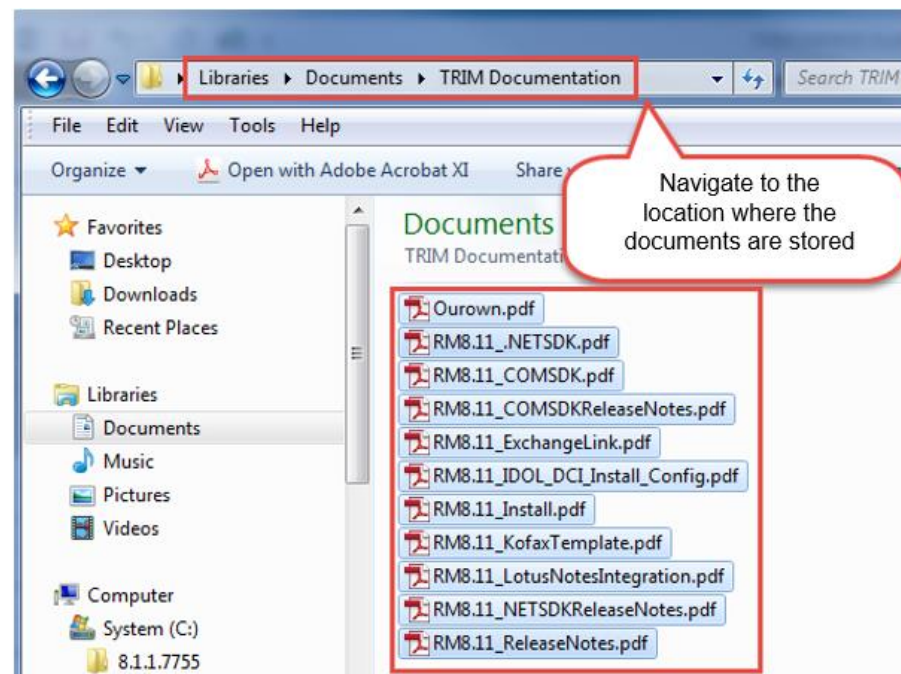
- Locate the destination folder in TRIM9 that you want to move the documents to:



- Navigate to the location on your computer where the documents which you want to transfer into TRIM9 are located (refer below screenshot):

- Select the documents you want to store in TRIM9 (refer below screenshot):

Note: Select only the documents that are to be stored in the same TRIM9 folder:

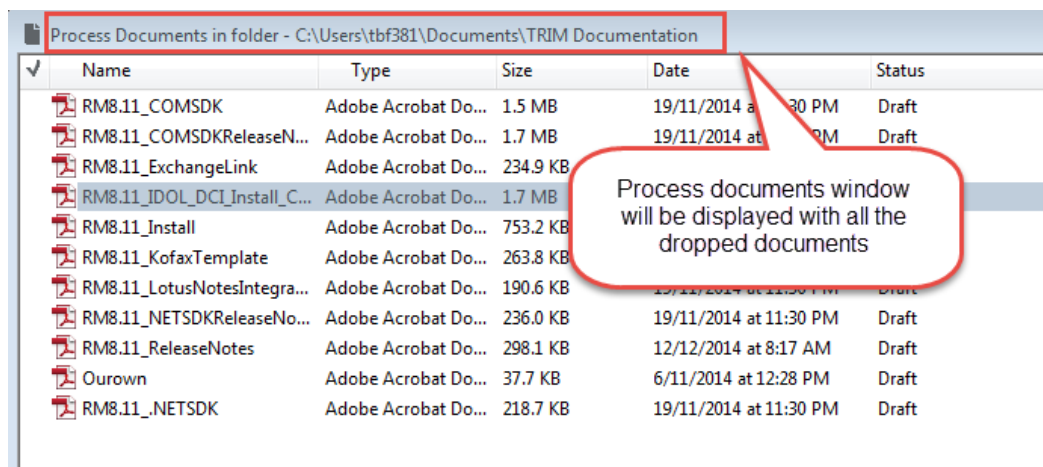


8. Drag the documents into TRIM9 and drop them on the destination folder:

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



Note: When the documents are dropped TRIM9 will create a document queue and a 'Process Documents in folder' window will be displayed with all the dropped documents listed (refer below):



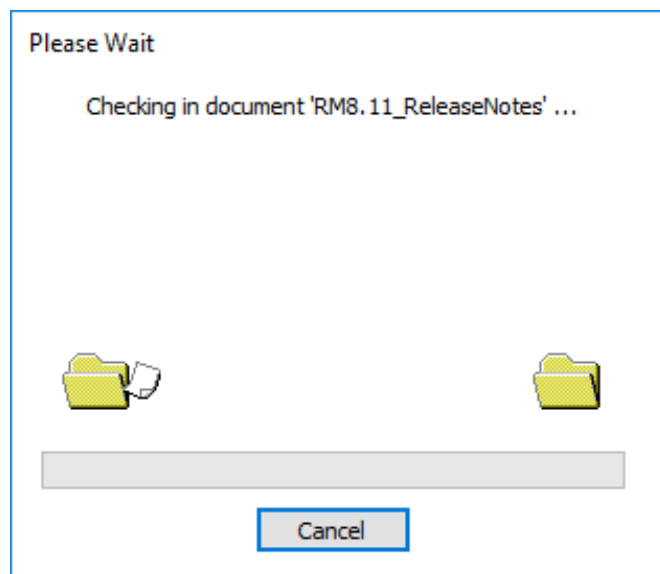
9. **Right-click** on any of the documents → **Tag All** (this will place a tick to the left of each document):



10. **Right-click** → **Check In**



11. A 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':

Process Documents in folder - C:\Users\tbf381\Documents\TRIM Documentation					
✓	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_COMSDKReleaseN...	Adobe Acrobat Do...		11:30 PM	Original
✓	RM8.11_ExchangeLink	Adobe Acrobat Do...		11:30 PM	Original
✓	RM8.11_IDOL_DCI_Install_C...	Adobe Acrobat Do...		11:30 PM	Draft
✓	RM8.11_Install	Adobe Acrobat Do...		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

As the documents are processed the status will change from Draft to Original

12. 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 TRIM9 folder (if they are not displaying, press **F5** on your keyboard to refresh the TRIM9 screen):

Records - number:15/1765 - 1 Record found		
✓	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 TRIM9, 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 TRIM9, then this option will continue to remain for all documents transferred until the setting is changed back.