

Moving Multiple Documents to TRIM9

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

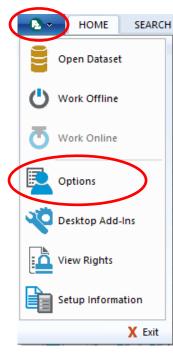
There are various ways to transfer multiple documents to TRIM9, and several different options that can be set. This document will explain the simplest way to transfer multiple documents.

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**:



Content Manager options		
٩		
Locale	Language	
User Interface	English (International) 🗸	
Spelling	Date format	
Search	dd/mm/yyyyy 🗸	
Search Results	Date separator	
ïewer	/ ~	
Oocument Store Cac		
Email	Sample date format	
Startup	dd/mm/yyyy	
Reporter	aa,, , , , , , , , , , , , , , , ,	
Documents		
Dropped Folders		
Dropzone		
	OK Cancel	Get Global Help

When the Content Manager enting window appears, select Decuments



3. 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:

٩		
	Default record type	_
ale	ELECTRONIC DOCUMENT	
er Interface	Use the default record type in integrated authoring applications	
elling	Default Container	
irch		
rch Results		Q.
wer	Confirm check in action before continuing	
cument Store Cac	Display data entry form when creating new records	
ail	Display Document in Viewer When Processing	
rtup	If document is a Windows file:	
oorter		
cuments	Delete document after it has been processed	
opped Folders	Update style for an email message that has been processed	
pzone	Update the email message with an 'In Content Manager' indicator	~
	Automatically remove offline record containers when they become empty	
	Add documents to 'Recent Documents' when they are extracted or viewed	
	Add documents to Recent Documents when they are extracted of viewed	
	OK Cancel Get Global	Help

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.

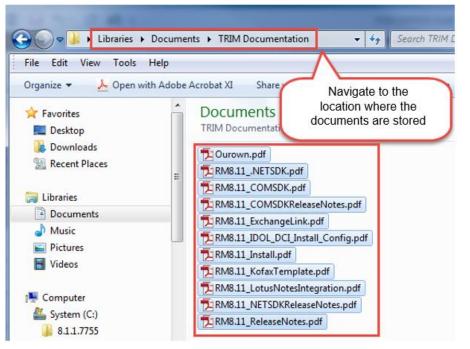
4. Click OK to close the 'Content Manager options' window (refer above screenshot).

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

💼 Records - number:15/1765 - 1 Record found		
🗸 📲 📹 Record Number	Title	
15/1765	INFORMATION MANAGEMENT - REPORTING -	

- 6. Navigate to the location on your computer where the documents which you want to transfer into TRIM9 are located (refer below screenshot):
- 7. 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

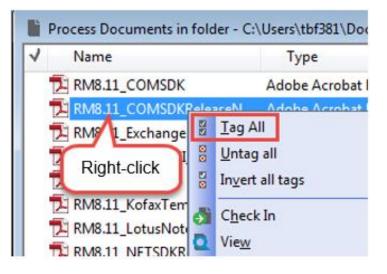
+ sign:

Name	Date modified	+	Cassillation	riopeines	
rvame	Dane modified	Type	Shortcuts ×	Search For	Search By Mat
🔁 Ourown.pdf	6/11/2014 12:28 PM	Adob	Favortes	📫 Records 🔹 👻	Record Number 15/
KM8.11NETSDK.pdf	19/11/2014 11:30	Adob		-	
TRM8.11_COMSDK.pdf	19/11/2014	:4dob		CReconts - number:15/176	5 - 1 Record found
TH RM8.11_COMP	PDF	- All	Records	🗸 🍶 🗂 Record Number	Title
RM8.11_Exch Hold do	wn left mouse	1	(The	al al 15/1765	INFORMATION MANAGEME
	drag and drop	20	~**	the second se	7.
RM8.11_Insta onto the f	folder in TRIM9	riaub	Locations	4	
RM8.11_Kofax	014 11:30	Adob			
1 RM8.11 LotusNotesIntegratio	n.pdf 19/11/2014 11:30	Adob	Classifications		
TRM8.11_NETSDKReleaseNotes	updf 19/11/2014 11:38	Adob			
T Di 10 11 Oulessablater adf	11/11/10/14 2:41 444	T del	43	4	

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):

Process Documents in folder - C:\	Users\tbf381\Docume	nts\TRIM Docume	entation	
Name	Туре	Size	Date	Status
🔁 RM8.11_COMSDK	Adobe Acrobat Do	1.5 MB	19/11/2014 a 30 PM	Draft
🔁 RM8.11_COMSDKReleaseN	Adobe Acrobat Do	1.7 MB	19/11/2014 at RM	Draft
🔁 RM8.11_ExchangeLink	Adobe Acrobat Do			
🔁 RM8.11_IDOL_DCI_Install_C	Adobe Acrobat Do	T'' IAID	ocess documents win	
🔁 RM8.11_Install	Adobe Acrobat Do	753.2 KB W	ill be displayed with al	
🔁 RM8.11_KofaxTemplate	Adobe Acrobat Do	263.8 KB	dropped documents	' J
🔁 RM8.11_LotusNotesIntegra	Adobe Acrobat Do	190.6 KB	13/11/2014 0011.30 F M	Dian
🔁 RM8.11_NETSDKReleaseNo	Adobe Acrobat Do	236.0 KB	19/11/2014 at 11:30 PM	Draft
🔁 RM8.11_ReleaseNotes	Adobe Acrobat Do	298.1 KB	12/12/2014 at 8:17 AM	Draft
🔁 Ourown	Adobe Acrobat Do	37.7 KB	6/11/2014 at 12:28 PM	Draft
🔁 RM8.11NETSDK	Adobe Acrobat Do	218.7 KB	19/11/2014 at 11:30 PM	Draft

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



10. Right-click \rightarrow Check In

√ Name	Туре	Size	Date
V 🔁 RM8.11_COMSDK	Adobe Acrobat Do	1.5 MB	19/11/2014
V 🔁 RM8.11_COMSDKReleaseN	Adobe Acrobat Do	1.7 MB	19/11/2014
 RM8.11_ExchangeLink RM8.11 OL DCLInstall_C RM8.11 OL DCLInstall_C RM8.11_LotusNotesIntegra RM8.11_LotusNotesIntegra RM8.11_NETSDKReleaseNo RM8.11_ReleaseNotes Ourown RM8.11NETSDK 	Iag All Untag all Invert all tags Check In View Send to Mail Reci Remove Document Delete Document	nt from Docur	Ctrl+A Ctrl+U



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

Please Wait	
Checking in document 'RM8.11_Relea	seNotes'
Cancel	

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	Туре	Size	Date	Status
✓ 1 RM8.11NETSDK	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
✓ 1 RM8.11_COMSDKReleaseN	Adobe Acrob		11:30 PM	Original
🗸 🔁 RM8.11_ExchangeLink	AUDDE ACIO	As the documer		Original
✓ 1 RM8.11_IDOL_DCI_Install_C	AUDDEACIU	ocessed the st	JU FIVI	Draft
🗸 🔁 RM8.11_Install	Adobe Acro Char	nge from Draft t	to Original 30 PM	Draft
🗸 🔁 RM8.11_KofaxTemplate	Adobe Acrobat Do	263.8 KB	19/11/2014 at 11:30 PM	Draft
✓ 1 RM8.11_LotusNotesIntegra	Adobe Acrobat Do	190.6 KB	19/11/2014 at 11:30 PM	Draft
✓ 1 RM8.11_NETSDKReleaseNo	Adobe Acrobat Do	236.0 KB	19/11/2014 at 11:30 PM	Draft

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	L 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	RM8.11NETSDK

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.