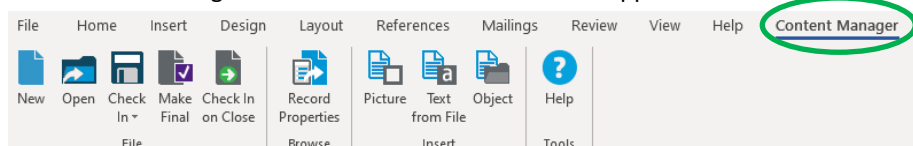## TRIM9 Microsoft Office Integrations

The TRIM9 / Microsoft Office Integration allows the user to:

- Open and save documents directly with TRIM9
- View TRIM9 record properties of the current document
- Make TRIM9 documents final

The Content Manager ribbon within a Microsoft Office Application contains the following:

BUTTON	FUNCTION
New	Click to select a document template from TRIM9 and create a new record based on the selected template
Open	Click to open a document from TRIM9
Check In	Click to save a document to TRIM9
Make Final	Click to make a document revision the final revision
Check In on Close	Automatically check the document into TRIM9 when it is closed
Record Properties	Displays the CM9 Record Properties of the current document
Picture	Insert a picture from TRIM9 in a Word, PowerPoint or Excel file
Text from File	Insert text from an electronic document in CM9
Object	Insert an object from an electronic document in CM9
Help	Click to open the help file

Open a TRIM9 document from a Microsoft Application

1. Open the required Microsoft Application e.g. Microsoft Word
2. Click **File** and **Open**
3. Select **Content Manager** from the 'open menu' and **Open**.
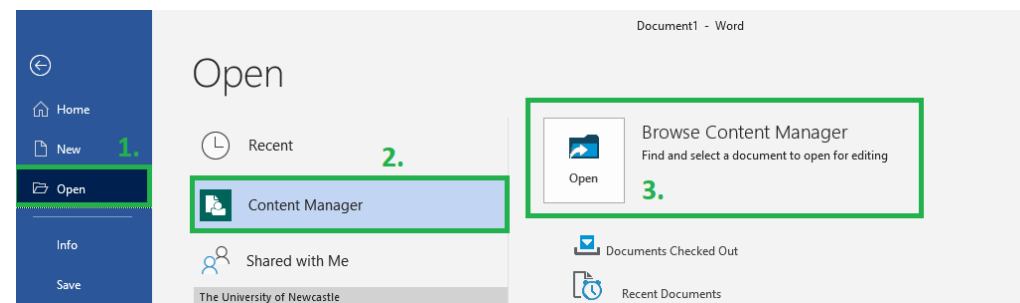
4. Using the TRIM9 Searching window, search for the desired document and click **ok.** The document will now open in the Microsoft Application.
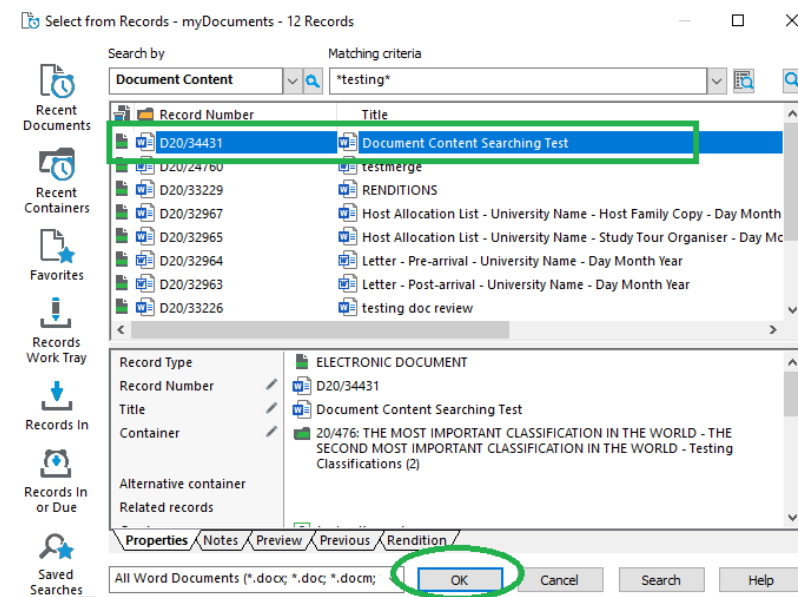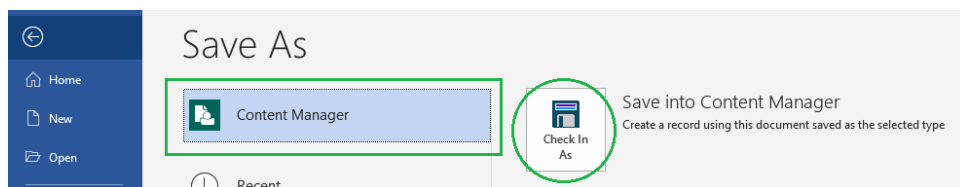
## Save a new Microsoft Office document to TRIM9

There are two available methods to save a MS document to TRIM9:
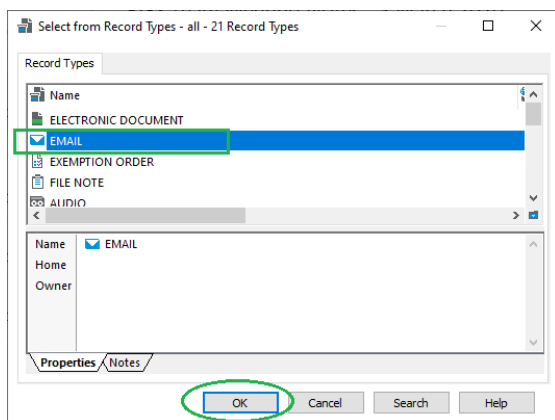
Save Directly to TRIM9

1. Create the document in the required Microsoft Application e.g. Microsoft Word
2. Click **File** and **Save As**
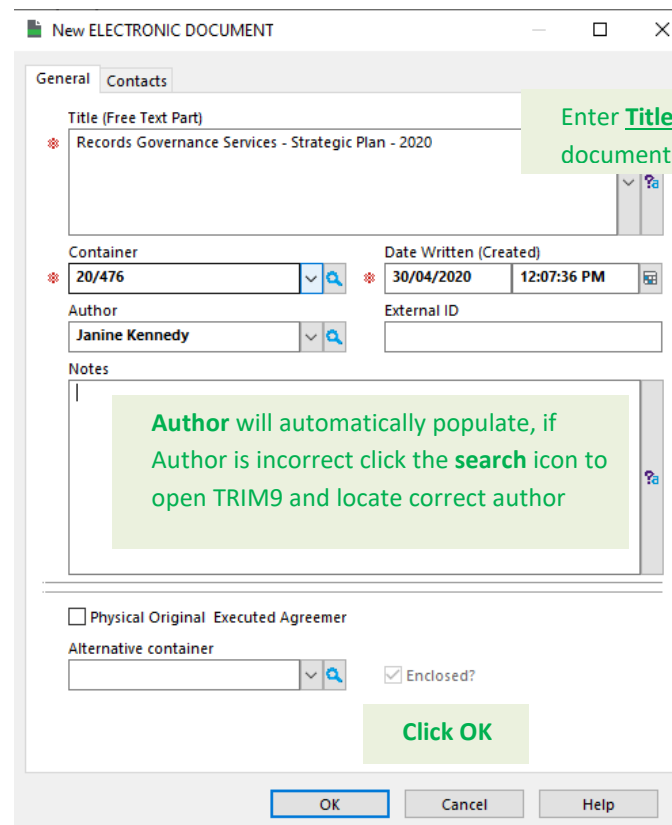3. Select **Content Manager** from the 'Save As' menu and **Check In As**

Or, alternatively select **Content Manager** on the Microsoft ribbon and click **Check In**
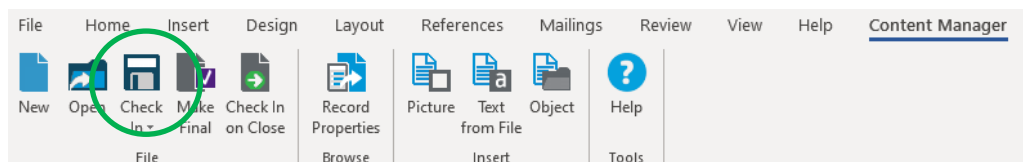
4. Select **Electronic Document** as a Record Type – Click **OK**

5. Populate the **New Document** data entry form and click **OK**


Enter **Title** for document

Enter **Container** number if known, if unknown select the **search** icon to open TRIM9 and locate container

Author will automatically populate, if Author is incorrect click the **search** icon to open TRIM9 and locate correct author
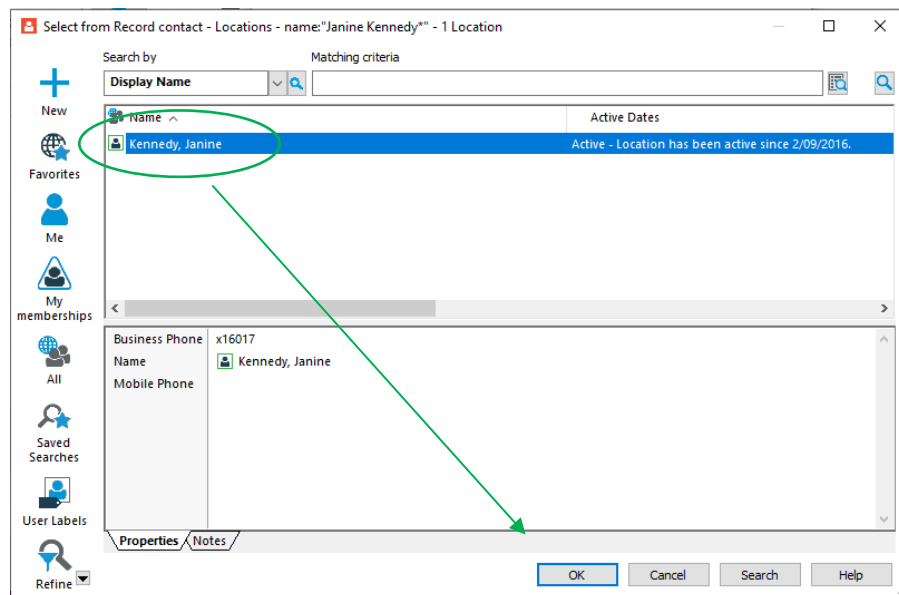
Date Written will automatically populate

Click OK

*Note – After clicking **OK** you may encounter an additional pop-up box from the **Author** field

- Click **YES** to choose an existing location (you)
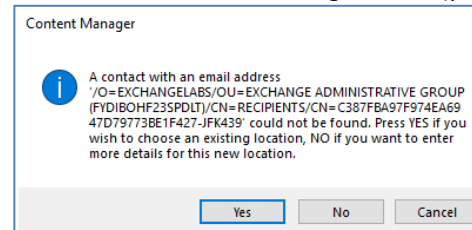
- Select the **INTERNAL LOCATION** that applies to you and click **OK**

Drag and Drop

1. Click **File** and **Save As** to save the document to your local machine e.g. Desktop
2. Open TRIM9 and locate the **Container** the document will be saved to
3. Navigate to the document on your desktop, left click and drag the document into TRIM9 and release on the previously located container
4. Follow steps **4** and **5** as outlined above

View TRIM9 Record Properties

This functionality allows the user to view the Record Properties of a document that has been opened from TRIM9.

1. Open your document directly from TRIM9 (as outlined above)
2. Click the **Content Manager** tab at the top of the Microsoft Application ribbon
3. Click **Record Properties**
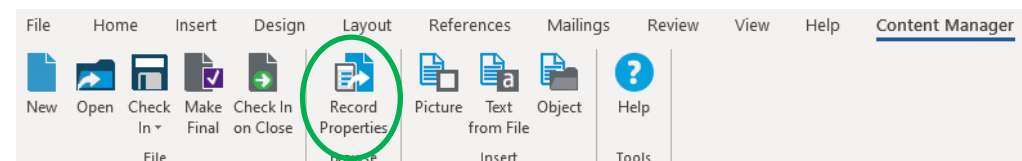
4. The **TRIM9 Record Properties** window will appear within the Microsoft Application
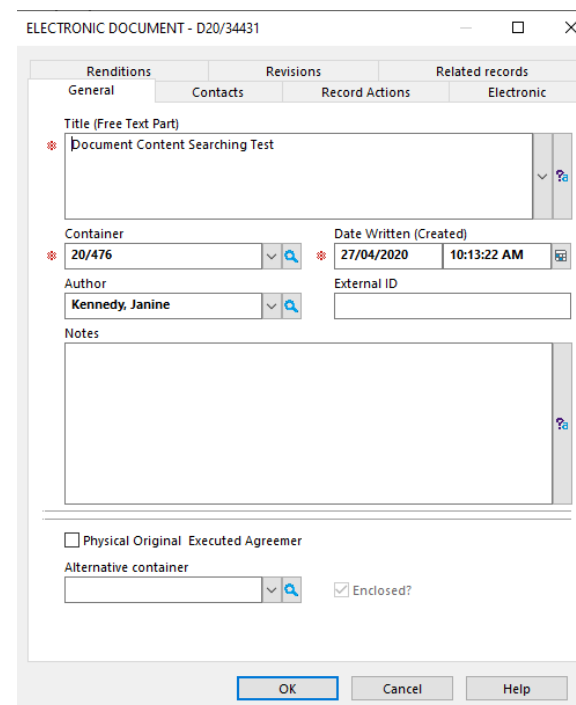
Make TRIM9 Documents Final

This functionality allows the user to make a document revision the final revision before checking it back into TRIM9.

Once a document is set as **Final**, no more revisions can be made to the record, this includes not being able to check out a document for modification.

1. Open your document directly from TRIM9 (as outlined above) and make the required changes
2. When ready to save the document back into TRIM9, click the **TRIM9 (CM9)** tab at the top of the Microsoft Application ribbon
3. Click **Make Final**
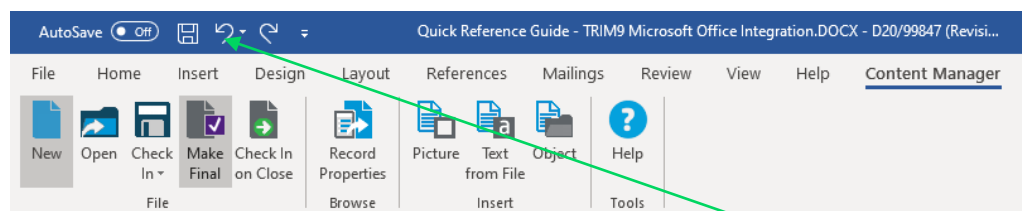
4. Continue to save the document back into TRIM9 by clicking the **Save** button at the top of the Microsoft Application