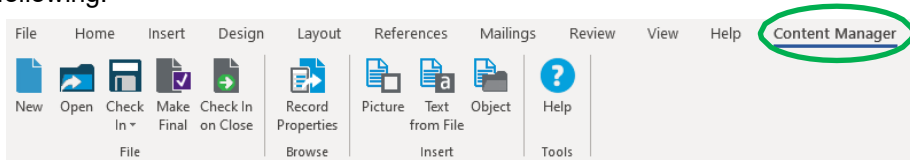


### TRIM Microsoft Office Integration

The TRIM / Microsoft Office Integration allows the user to:

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

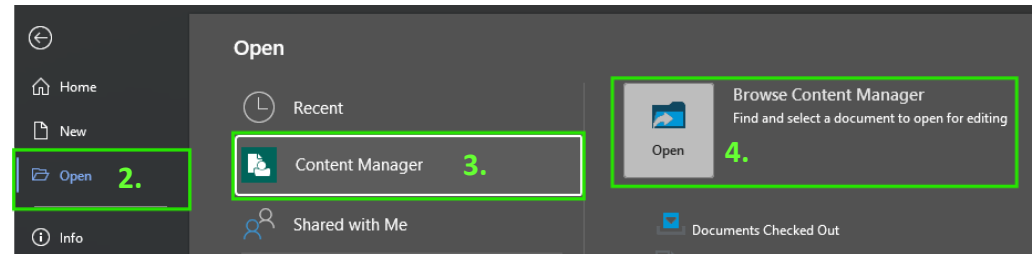
The Content Manager ribbon within a Microsoft Office Application contains the following:



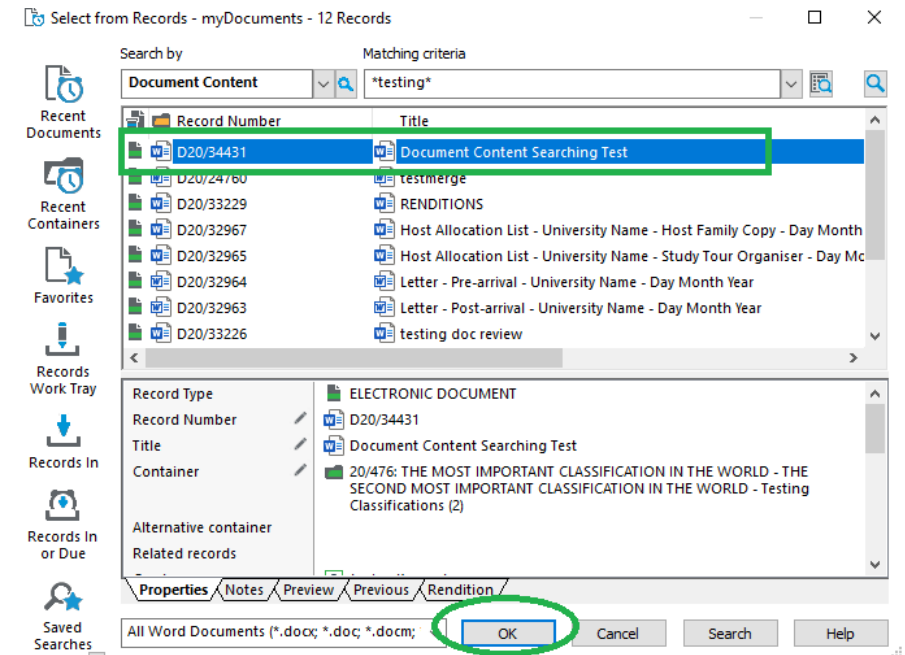
BUTTON	FUNCTION
<b>New</b>	Click to select a document template from TRIM and create a new record based on the selected template
<b>Open</b>	Click to open a document from TRIM
<b>Check In</b>	Click to save a document to TRIM
<b>Make Final</b>	Click to make a document revision the final revision
<b>Check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

### Open a TRIM document from a Microsoft Application

1. Open the required Microsoft Application e.g. Microsoft Word
2. Click **File**, then **Open**
3. Select **Content Manager** from the Open menu
4. Click **Open**



5. Using the **TRIM Search window**, search for the desired document and click **OK**. The document will open in the Microsoft Application.

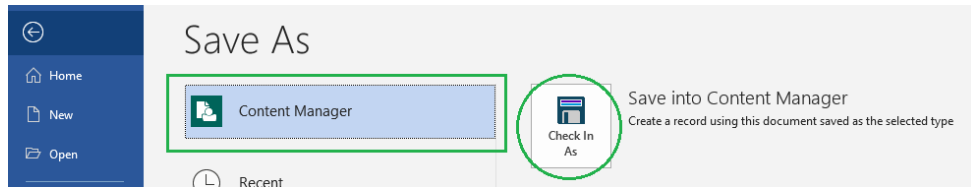


### Save a new Microsoft Office document to TRIM

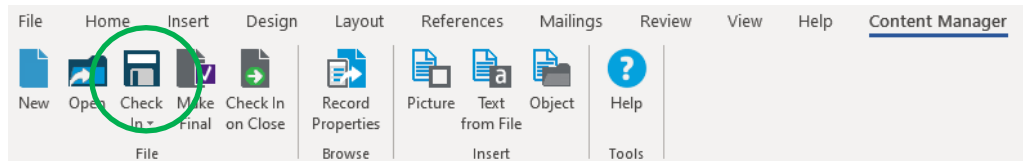
There are two available methods to save a Microsoft Office document to TRIM

#### Save Directly to TRIM

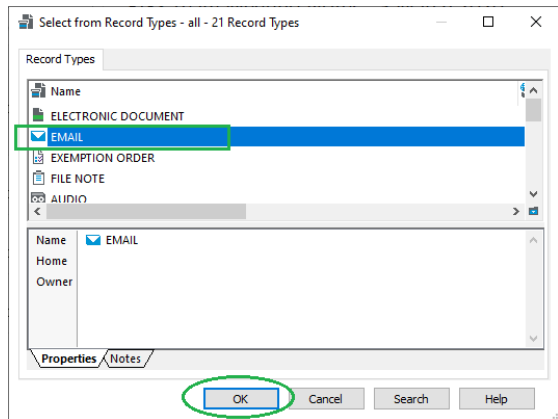
1. Create the document in the required Microsoft Application e.g. Microsoft Word
2. Click **File** and **Save As**
3. Select **Content Manager** from the 'Save As' menu and click **Check In As**



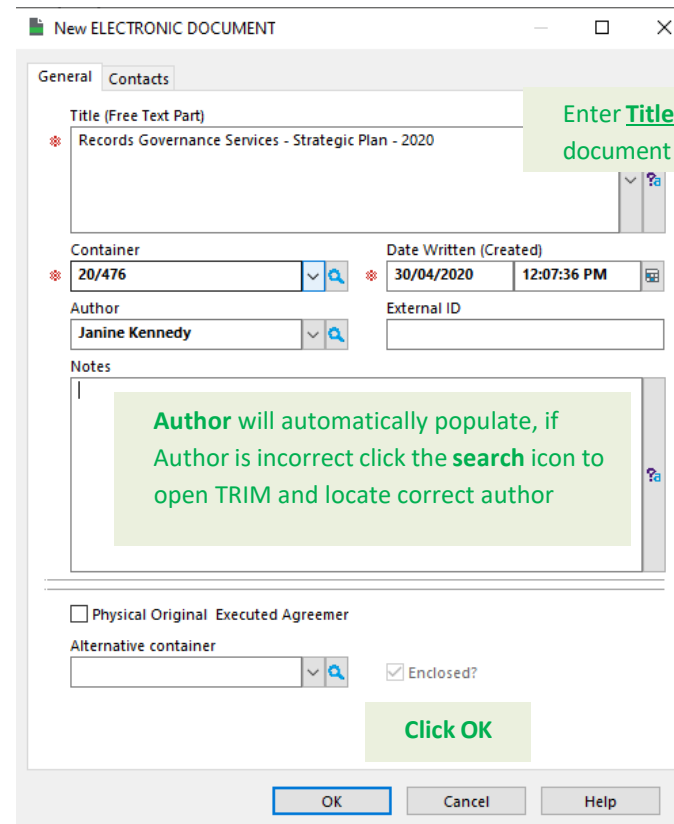
Or, alternatively, select **Content Manager** on the Microsoft ribbon and click **Check In**



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

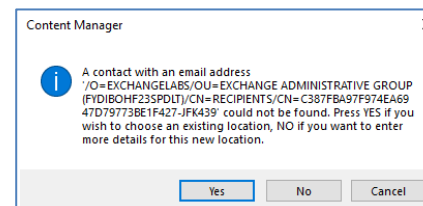
Enter **Container** number if known, if unknown select the **search** icon to open TRIM and locate container

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

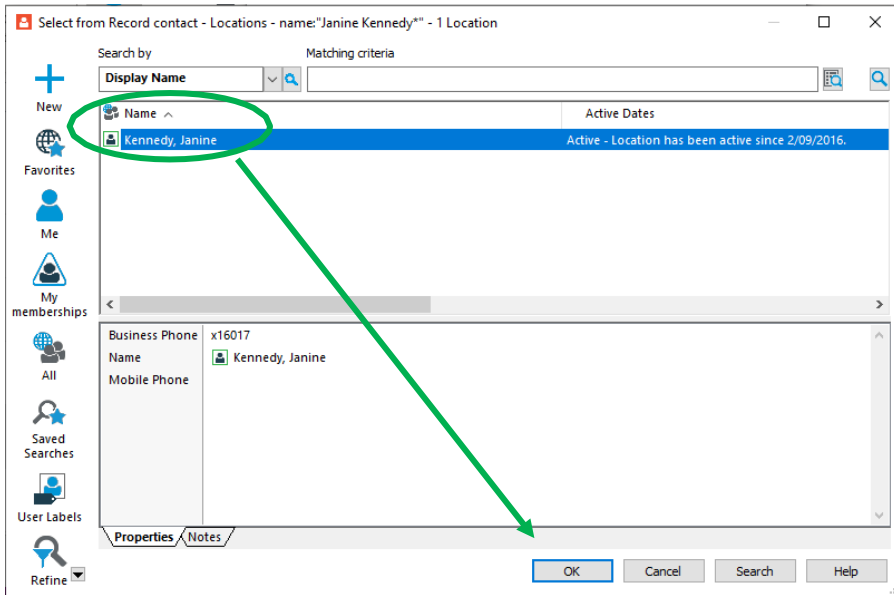
**Date Written** will automatically populate

**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**



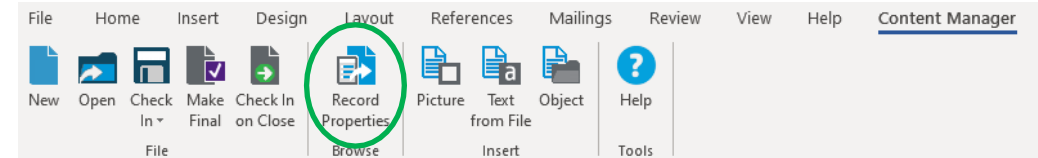
### Drag and Drop

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

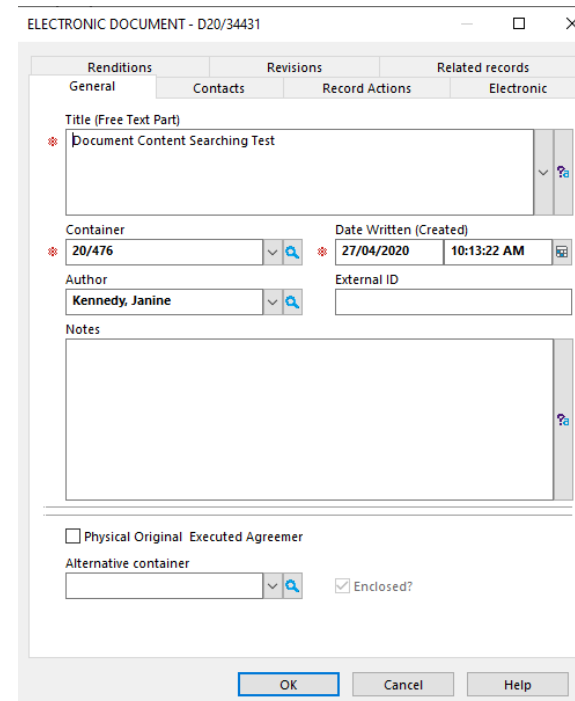
### View TRIM Record Properties

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

- Open your document directly from TRIM (as outlined above)
- Click the **Content Manager** tab at the top of the Microsoft Application ribbon
- Click **Record Properties**



- The **TRIM Record Properties** window will appear within the Microsoft Application

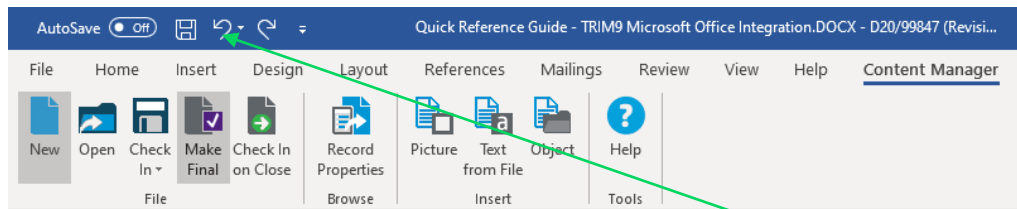


### Make TRIM Documents Final

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

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 TRIM (as outlined above) and make the required changes
2. When ready to save the document back into TRIM, click the **TRIM (Content Manager)** tab at the top of the Microsoft Application ribbon
3. Click **Make Final**



4. Continue to save the document back into TRIM by clicking the Save button at the top of the Microsoft Application