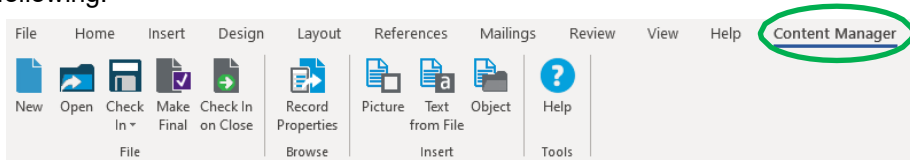


TRIM Microsoft Office Integration

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

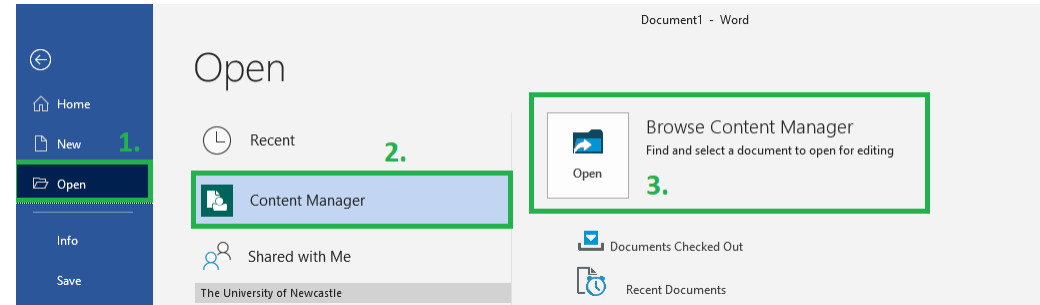
The Content Manager ribbon within a Microsoft Office Application contains the following:



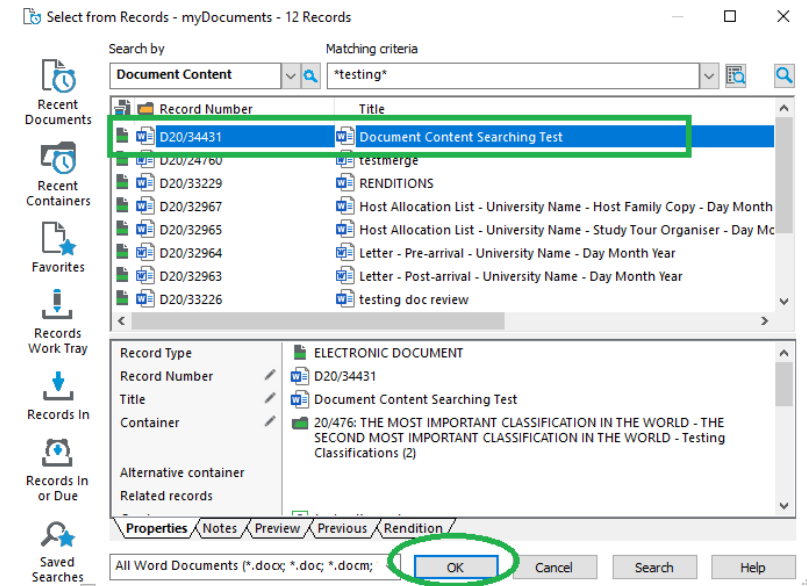
BUTTON	FUNCTION
New	Click to select a document template from TRIM and create a new record based on the selected template
Open	Click to open a document from TRIM
Check In	Click to save a document to TRIM
Make Final	Click to make a document revision the final revision
Check In on Close	Automatically check the document into TRIM when it is closed
Record Properties	Displays the CM9 Record Properties of the current document
Picture	Insert a picture from TRIM 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 TRIM document from a Microsoft Application

1. Open the required Microsoft Application e.g. Microsoft Word
2. Click the **File** and **Open**
3. Select the **Content Manager** from the 'open menu' and **Open**.



4. Using the TRIM Searching window, search for the desired document and click **ok**. The document will now open in the Microsoft Application

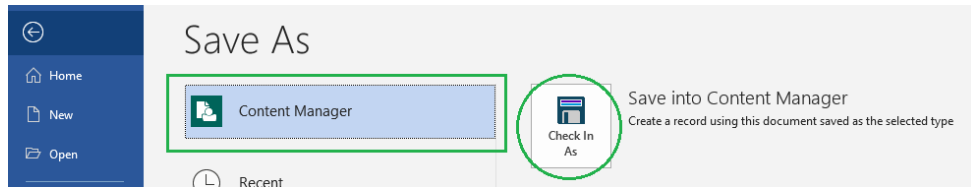


Save a new Microsoft Office document to TRIM

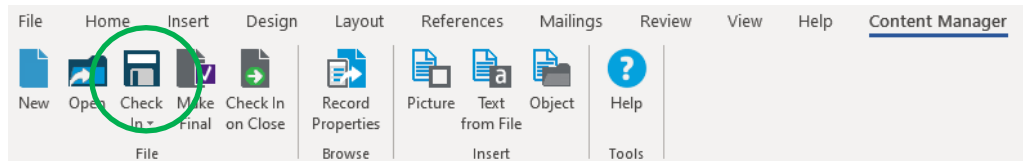
There are two available methods to save a Microsoft Office document to TRIM

Save Directly to TRIM

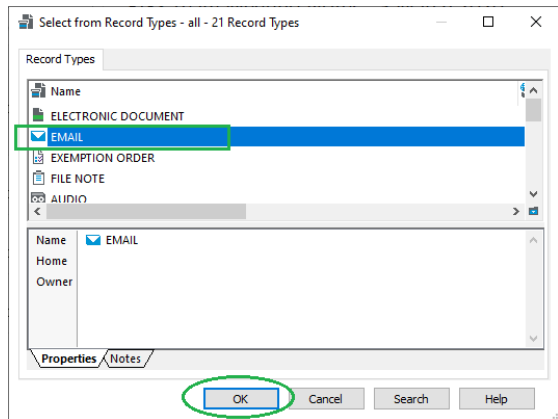
1. Create the document in the required Microsoft Application e.g. Microsoft Word
2. Click **File** and **Save As**
3. Select **Content Manager** from the 'Save As' menu and click **Check In As**



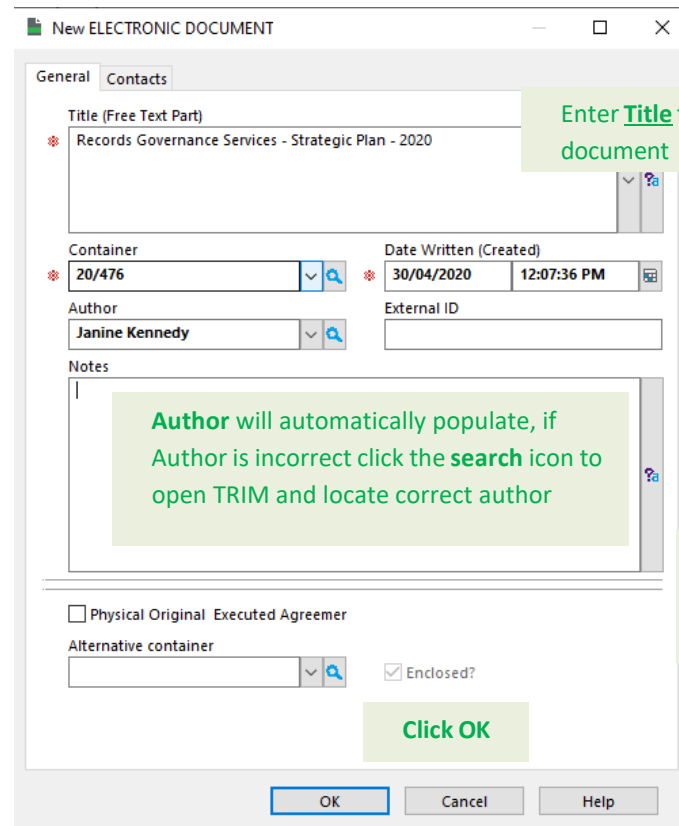
Or, alternatively, select **Content Manager** on the Microsoft ribbon and click **Check In**



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

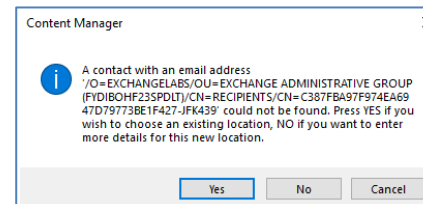
Enter **Container** number if known, if unknown select the **search** icon to open TRIM and locate container

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

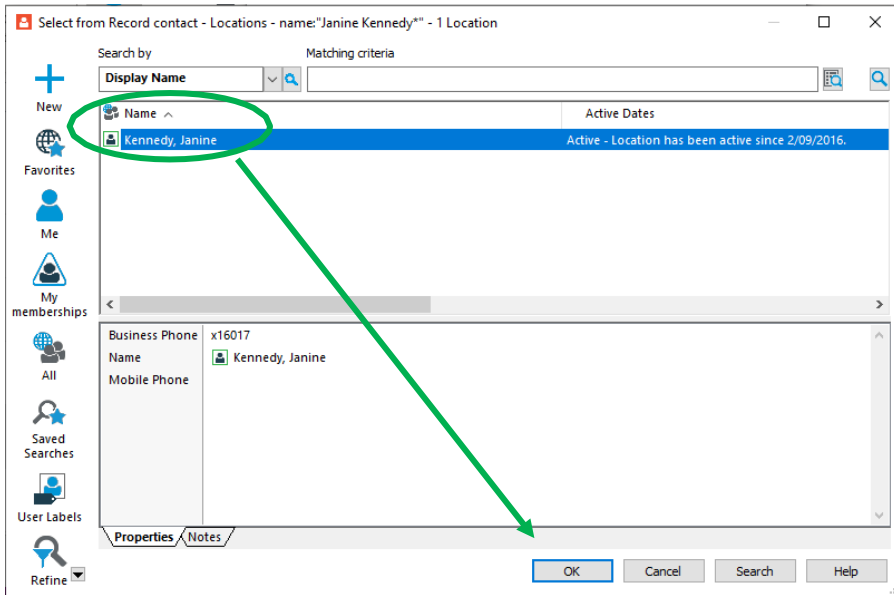
Date Written will automatically populate

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**



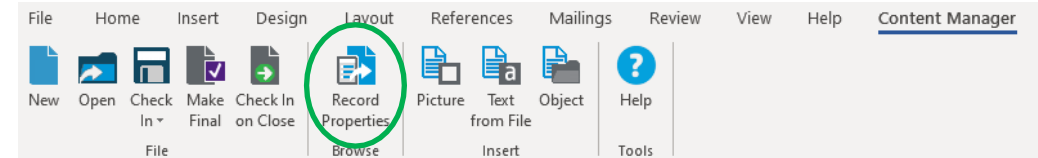
Drag and Drop

- 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

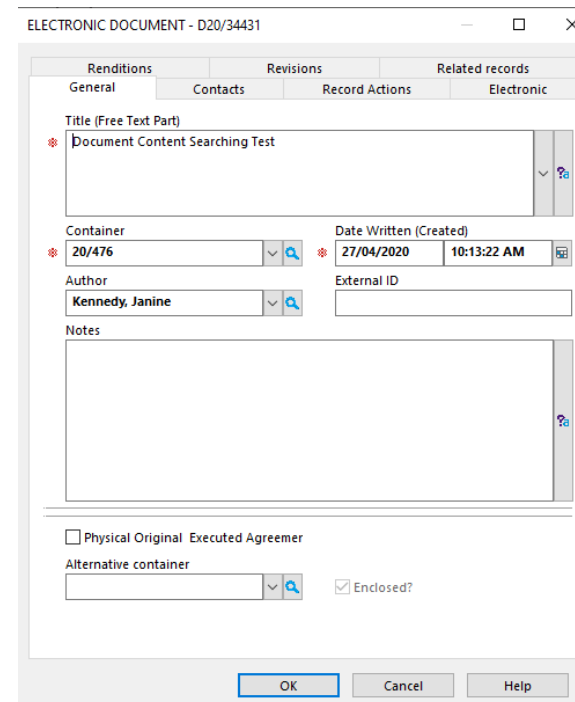
View TRIM Record Properties

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

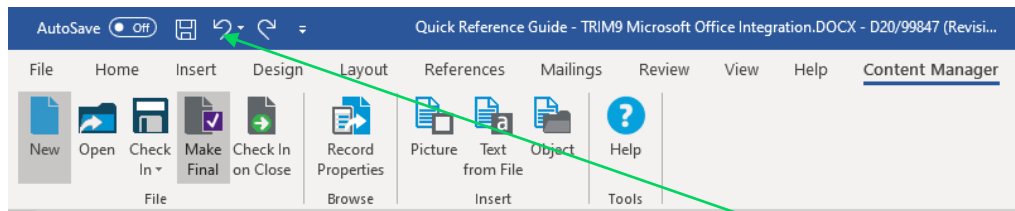


Make TRIM Documents Final

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 (CM9)** 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