Saving Documents from your Desktop, Windows Explorer and Outlook (Email Attachments) into TRIM

For the purpose of this guide, the term 'document' will be used to refer to Word documents, Excel spreadsheets, PowerPoint presentations, PDFs etc. as well as photos, videos and audio recordings.

You can save documents directly from your Desktop and Windows Explorer to TRIM9 by dragging and dropping. You can also drag and drop documents which are attached to emails directly to TRIM9 (full Outlook client required).

To save a document from your Desktop, Windows Explorer or your email account:

1. First, locate and display the container in TRIM9 that you want to put the document into.

2. Navigate to where the document is currently stored (Desktop, Windows Explorer, email etc.).

3. Click on the document and drag it across to TRIM9 (do not release your mouse button yet):

    Hint: Should you only have one screen; you can drag the document onto your TRIM9 icon (refer below) in your Windows taskbar at the bottom of your computer screen which will display the TRIM9 window for you:
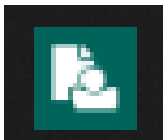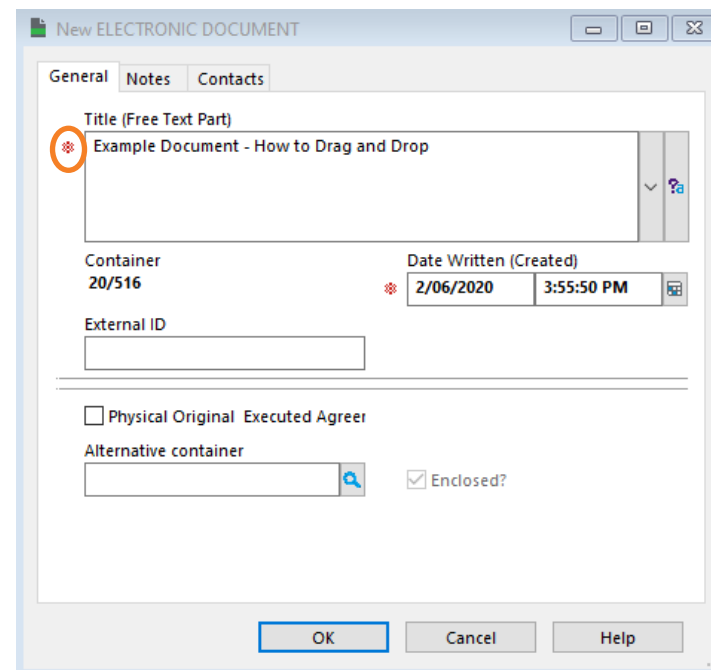

4. While continuing to hold the mouse button down, drag the document onto the container you want to put it into until it highlights blue, then release the mouse button.

5. This will display the **'Create New record'** window. Determine which record type you need to select:
    - **ELECTRONIC DOCUMENT** : Word document, spreadsheet, PDF etc.
    - **AUDIO** : Audio of meeting, voicemail message etc.
    - **VIDEO** : Video of meeting, training video etc.
    - **IMAGE** : Photo, .jpeg file, .png file etc.

Select the appropriate record type by clicking on it once, then click **OK**:
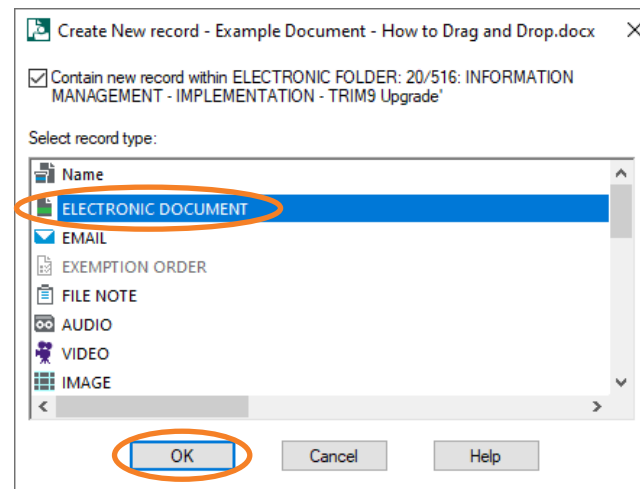
6. A **Record Entry Form** (example below) for your chosen record type will appear. Any mandatory field will have a red asterisk to the left of it:
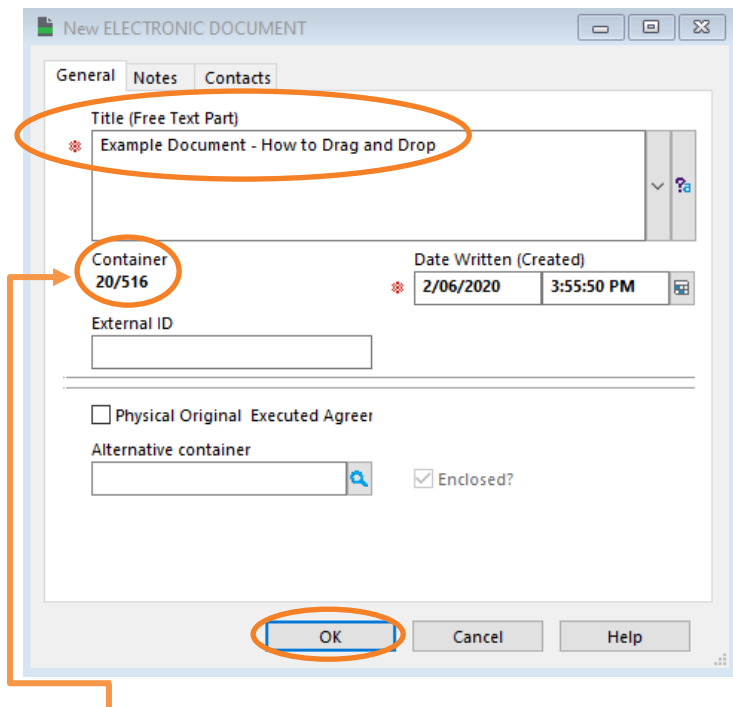
7. In the 'Title (Free Text Part)' field, type/amend the title of the document in line with the applicable naming convention:

8. The 'Container' field will be automatically populated for you because you dragged and dropped your document onto the TRIM9 container you want to put the document into. If applicable, complete any 'Mandatory' fields which haven't already been populated, and any optional fields for which you have information which you would like to record. Then click **OK** to save the document into TRIM9.

9. The document will appear in TRIM9: