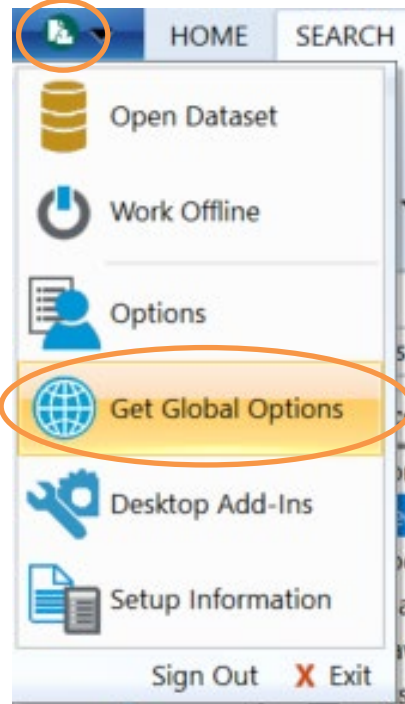


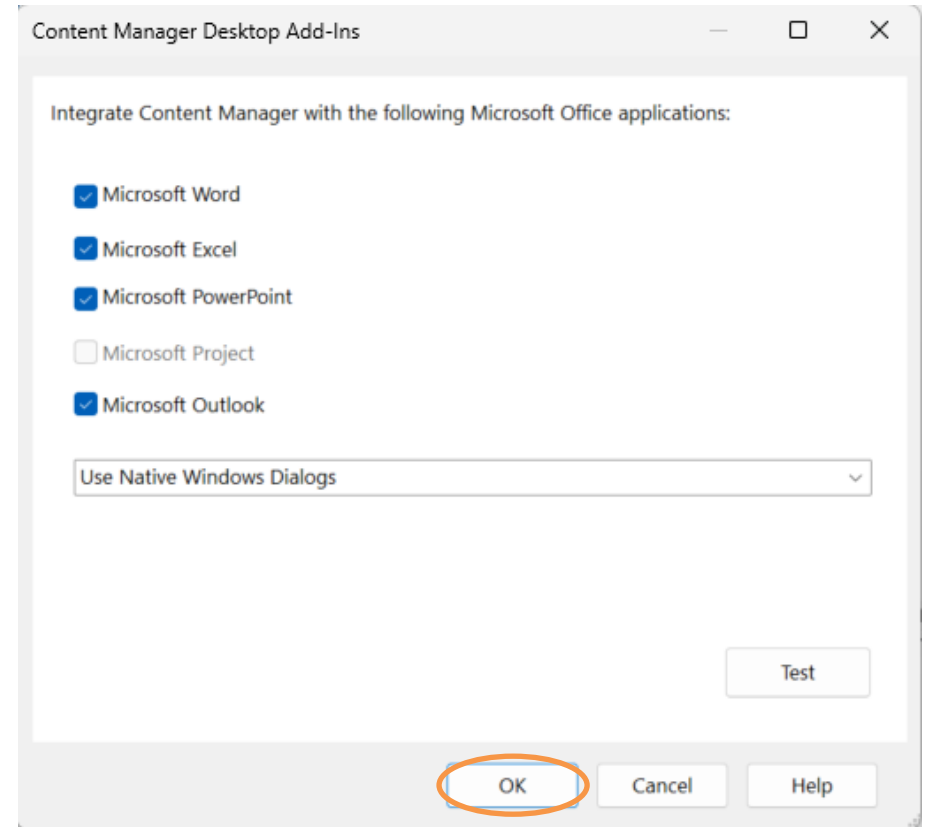
Desktop Add-Ins

TRIM can integrate with Microsoft Applications to allow you to save direct to TRIM from the Microsoft Application itself. However, there may be occasions when the Desktop Add-In for Microsoft Outlook, Word, Excel, PowerPoint or Project becomes disabled. Should you notice any issues with TRIM integrating with any of these applications you can check the Desktop Add-Ins settings in TRIM and re-enable these Add-Ins yourself should that be necessary:

1. Select the **FILE** button at the top left of the TRIM screen, then select **Desktop Add-Ins**:



2. Ensure the boxes are checked for every application which you have installed on your computer, then click **OK**:

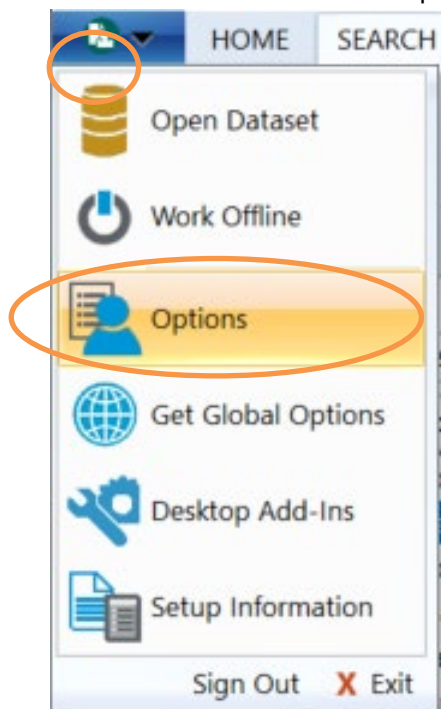


Note: If an application is not installed on your computer it will be greyed out.

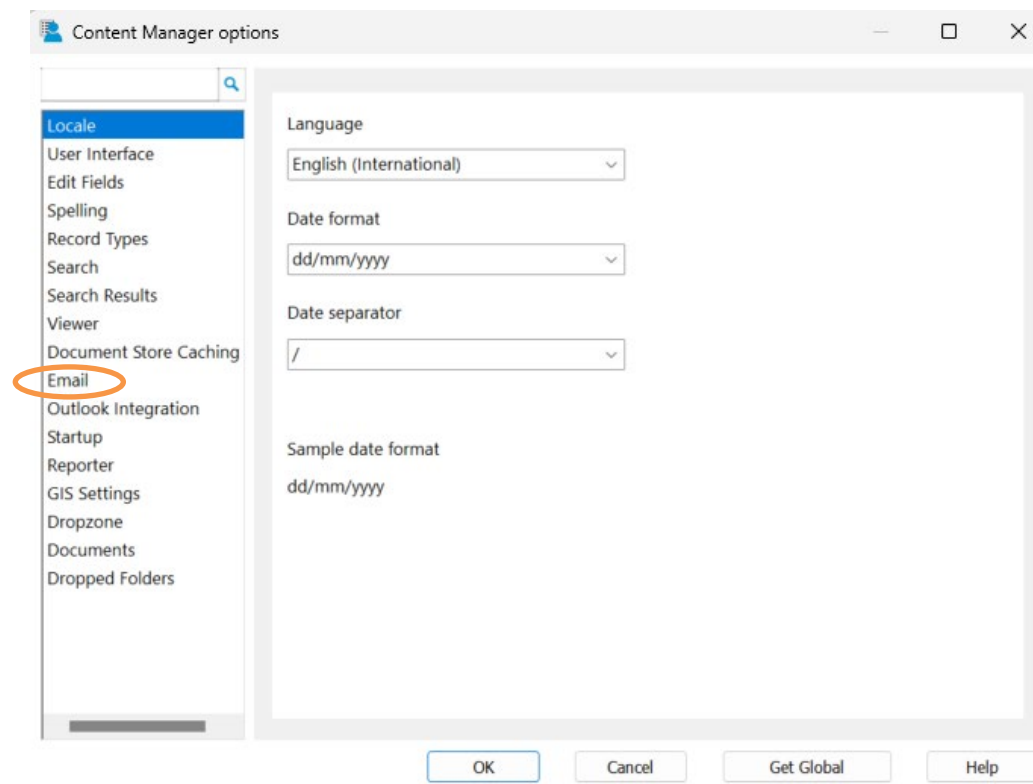
Email Integration

If you are experiencing any issues with Email/Outlook integration with TRIM, follow the below instructions to ensure your Email integration settings are correct:

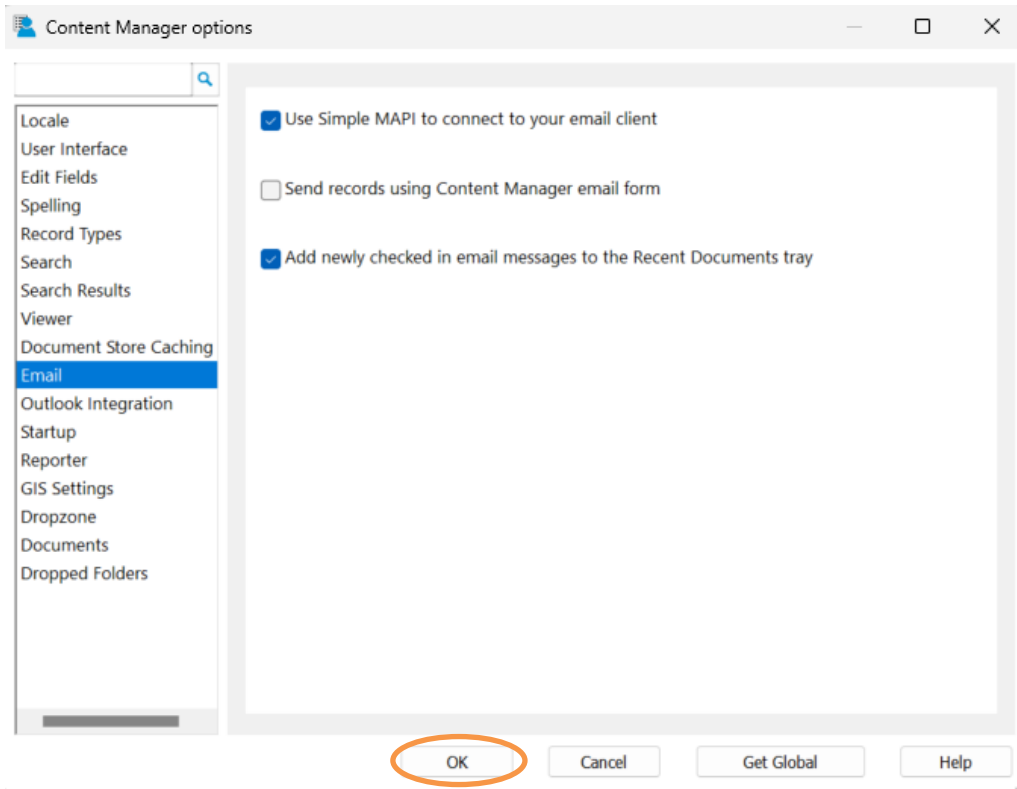
1. Select the **FILE** button at the top left of the TRIM screen, then select **Options**:



2. When the **'Content Manager options'** window appears, select **Email**:

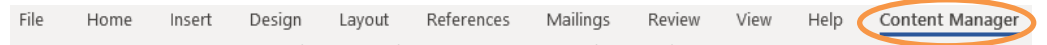


3. Ensure the first and third boxes are ticked as shown below, then select **OK**:



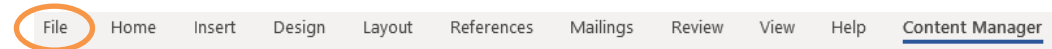
Checking for and Re-enabling Inactive or Disabled Add-Ins

When TRIM is integrated with a Microsoft Application, the **'Content Manager'** tab (refer below) should be displayed in the **Ribbon** for that application:

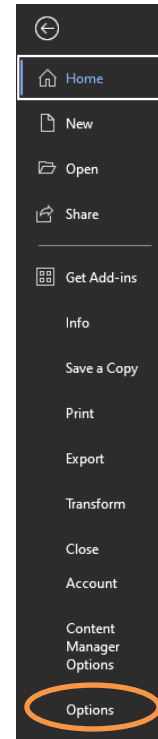


If the **'Content Manager'** tab is not displayed in the Ribbon for Microsoft Word, Excel, PowerPoint, Project or Outlook, it may have become Inactive or Disabled. This can be corrected by following the below instructions in the affected application:

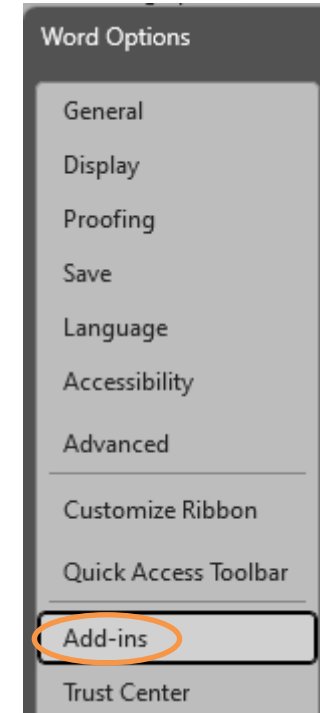
1. Select the **File** tab:



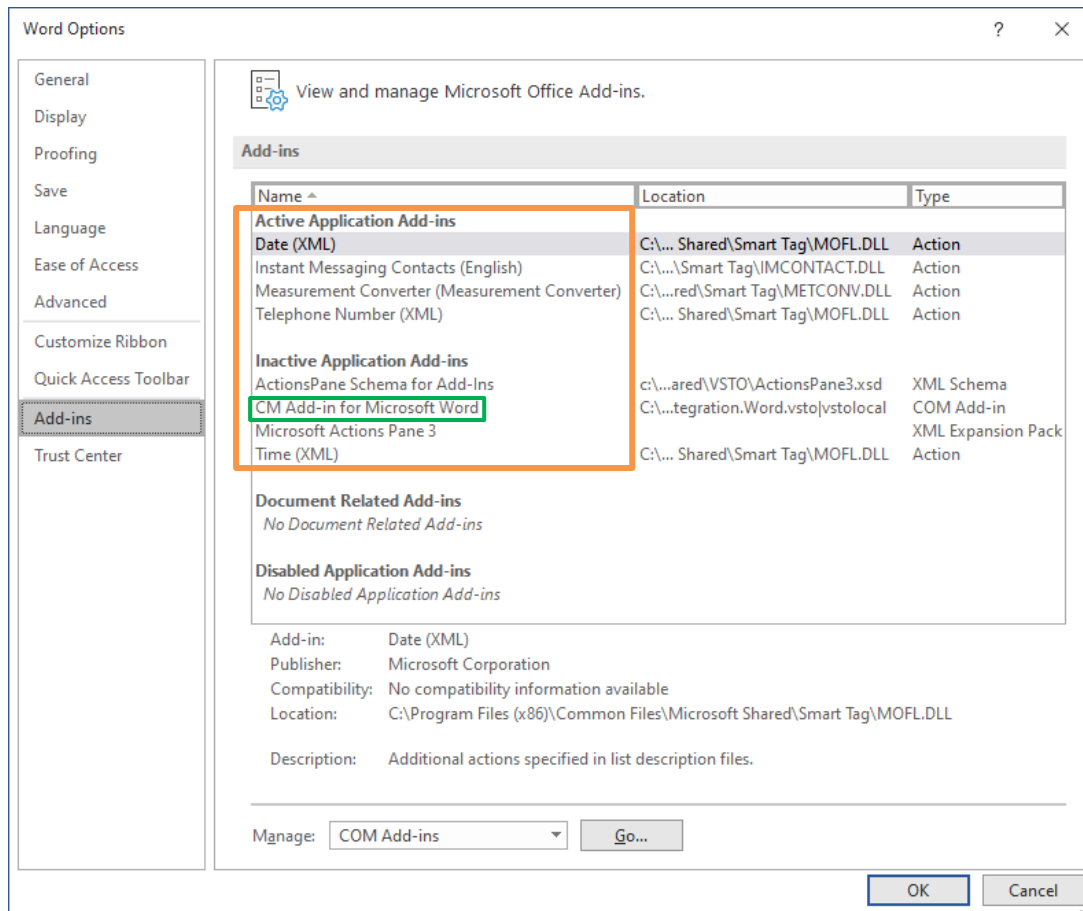
2. Click **Options**:



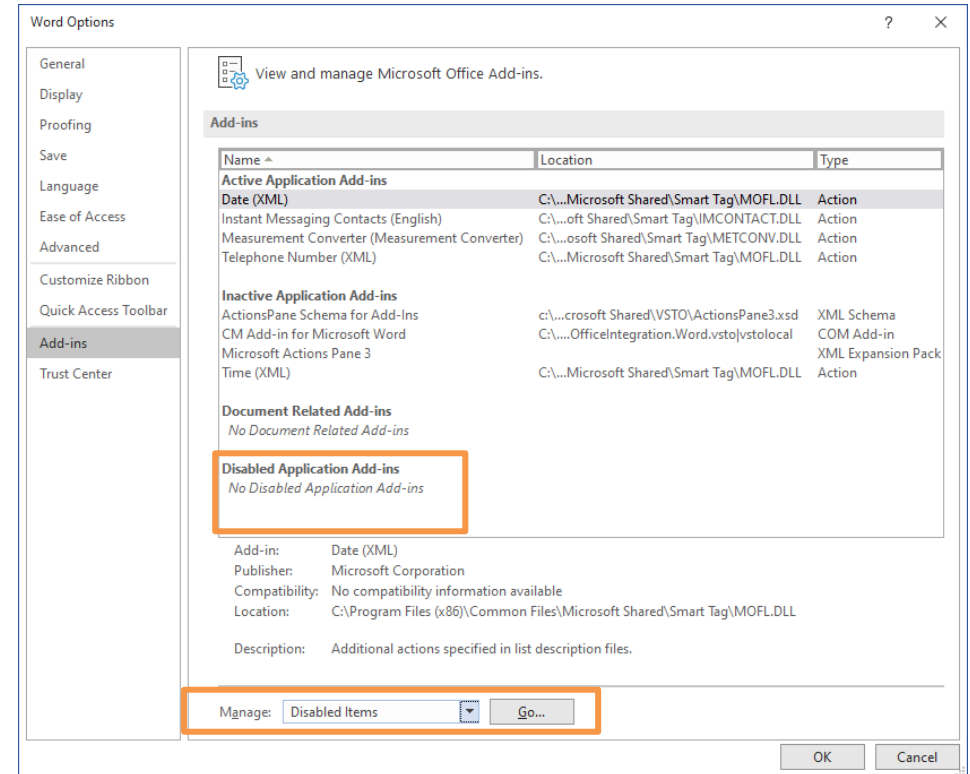
3. Click **Add-ins**:



4. a) The below window will appear. Look for the Add-In titled **CM Add-in for Microsoft**
If it is in the sections titled **Active Application Add-ins** or **Inactive Application Add-ins**; skip forward to [Step 6](#).



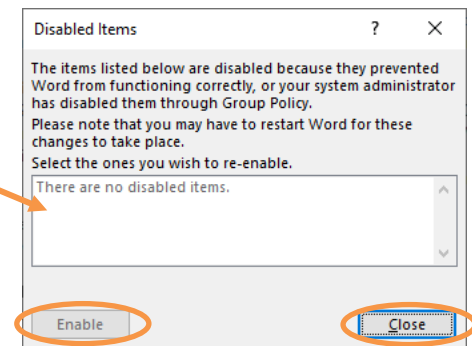
4. b) If the Add-In titled **CM Add-in for Microsoft** happens to be in the section titled **Disabled Application Add-ins**; use the **drop-down** on the 'Manage' field to populate this field with the **Disabled Items** option, then select the **Go...** button:



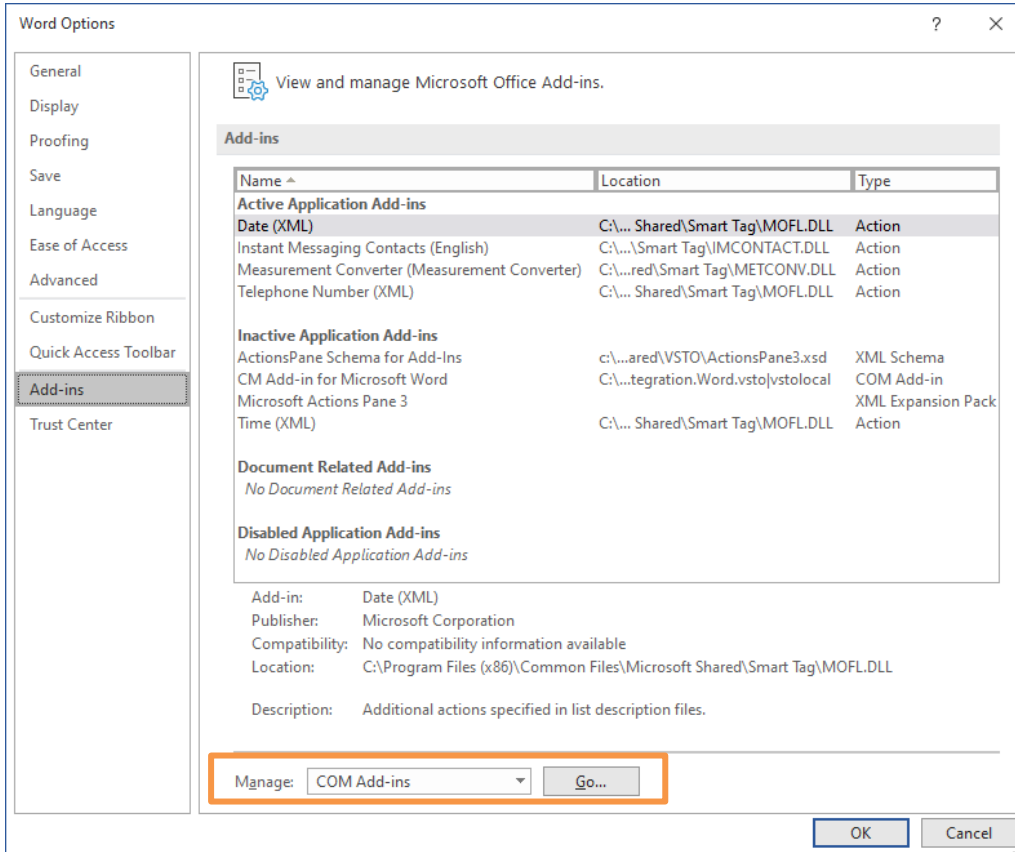
5. If the **CM Add-in for Microsoft Add-In** is currently disabled on your machine, it will be listed in this 'Disabled Items' window.

Click on it once to select it, then click the **Enable** button.

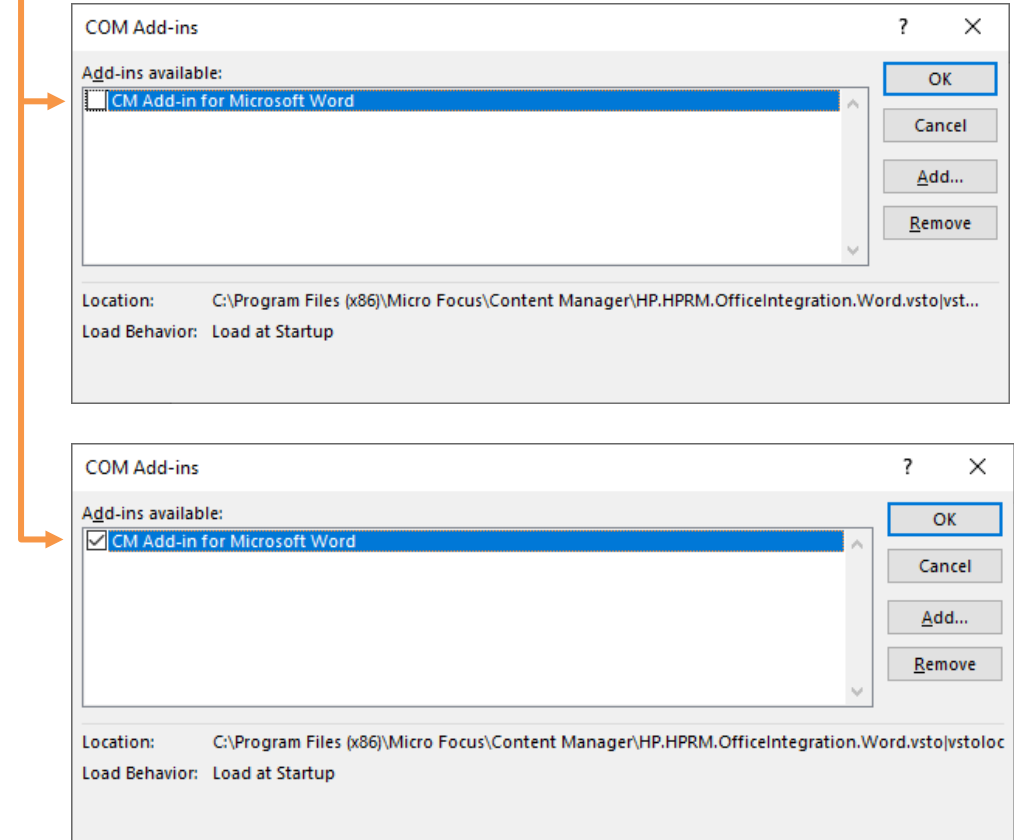
Then click the **Close** button to close the 'Disabled Items' window:



6. Ensure the 'Manage' field is populated with **COM Add-ins**. If not, use the **drop-down** to select **COM Add-ins**, then click **Go**.



7. The '**COM Add-ins**' window will appear. Ensure there is a tick in the 'CM Add-in for Microsoft...' checkbox. If not, click the **checkbox** once to place a tick in it:



8. Close then re-open the Microsoft Application, and hopefully you will find your integration issue is resolved.

Note: If after following the instructions in this guide you are still experiencing any integration issues between any Microsoft Application and TRIM, please contact Records Governance Services for assistance in troubleshooting further.

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