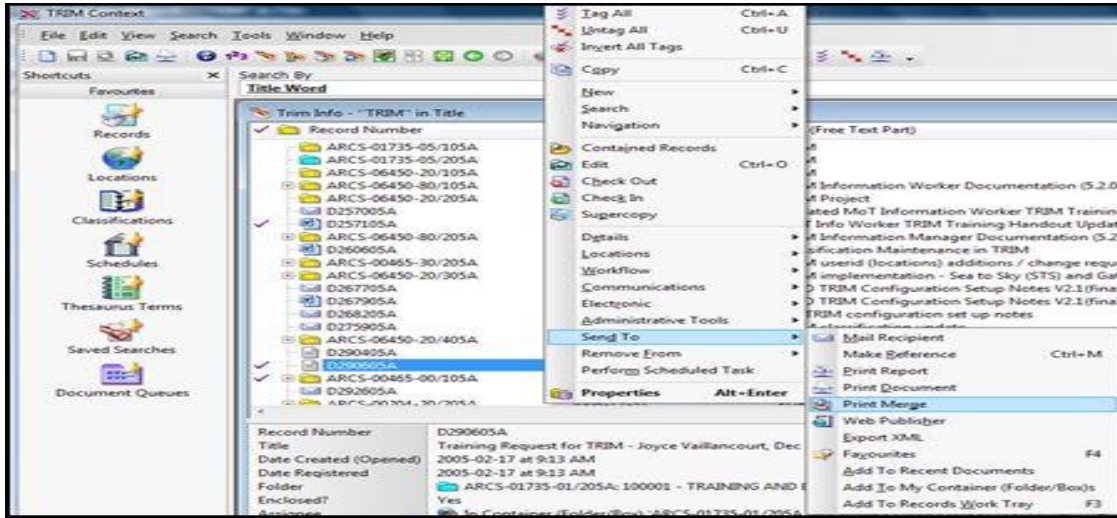


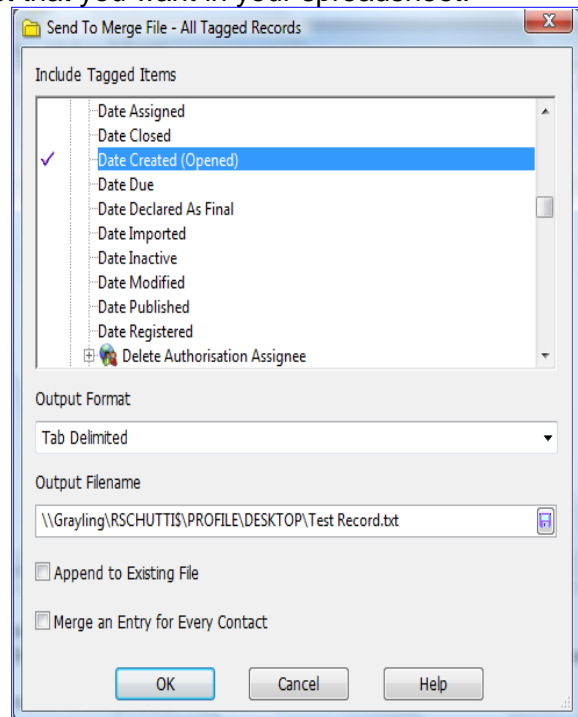
Primary Audience: Information Workers

To export TRIM data to an Excel spreadsheet:

1. Search for and tag the records you want in the spreadsheet.
2. Right-click on one of the tagged record, and select **Send to | Print Merge** from the drop down menu. Click **yes** to the **All Tagged Rows** prompt.

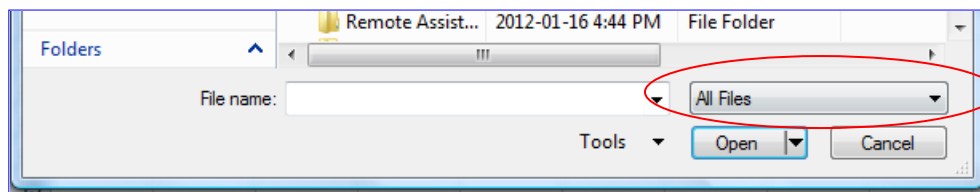
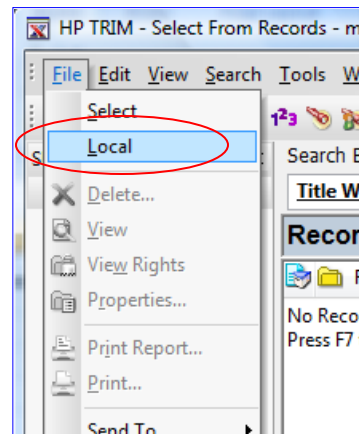


3. In the **Send to Merge File** dialogue box:
 - Tag the items in the **Include Tagged Items** list that you want in your spreadsheet.
 - From the **Output Format** drop-down menu, click on **Tab Delimited**.
 - Click on the disk icon beside the **Output Filename** field to bring up the **Save As** dialogue box. From here, enter a more meaningful title and save the document to your desktop.
 - Click **OK** and click **yes** to the **All Tagged Rows** prompt.
 - Tagged attributes will be remembered the next time you do a Print Merge.
4. From Excel, open your document. *Remember* it is a .txt file, not an .xls(x) file, so you must select **All Files** or **Text Files** from the dropdown list next to the Filename box. Click **Open**.

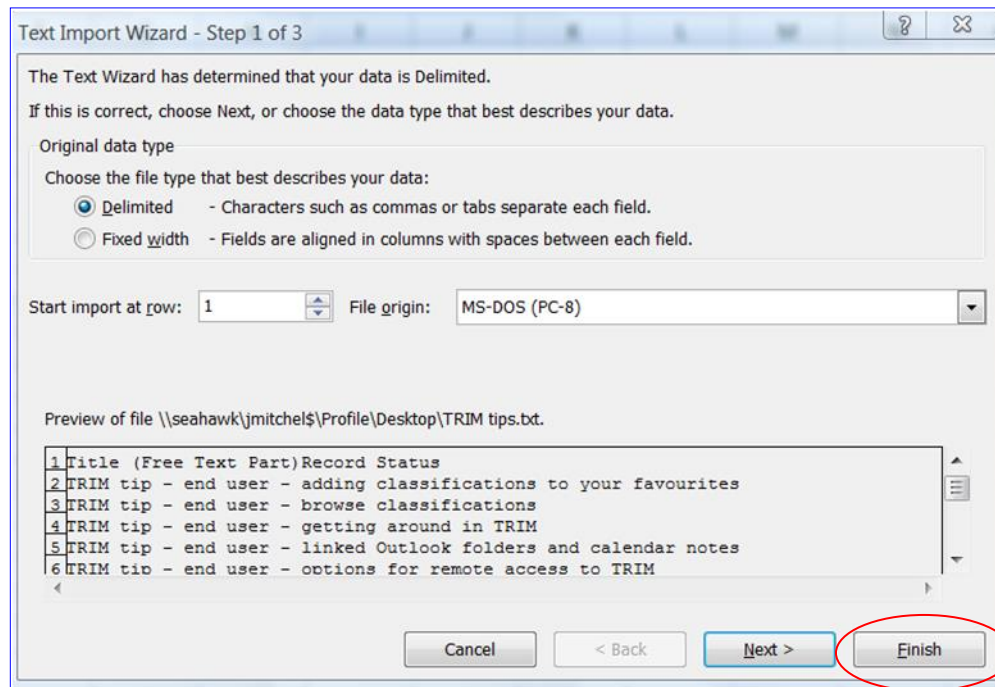


EDRMS TRIM Tip Exporting TRIM Data to Excel

If you have integrated Excel with TRIM, you will need to select **File | Local** from the **Open** menu to access your saved .txt file.



5. In the Text Import Wizard dialogue box, click Finish.



EDRMS TRIM Tip Exporting TRIM Data to Excel

- The TRIM data will now appear in an Excel spreadsheet that you can format, sort, and share. The TRIM fields will appear as Excel column headings.

	A	B	C	D	E	F	G	H	I
1	Creator	Date Created (O	Title (Free	Record Status					
2	Mitchell, Joni	2009-06-08 at 3:	TRIM tip - end user - browse classifications						
3	Mitchell, Joni	2009-06-10 at 5:	TRIM tip - end user - getting around in TRIM						
4	Mitchell, Joni	2009-06-16 at 2:	TRIM tip - end user - linked Outlook folders and calendar notes						
5	Mitchell, Joni	2009-06-16 at 2:	TRIM tip - end user - options for remote access to TRIM						
6	Mitchell, Joni	2009-08-17 at 5:	TRIM tip - end user - re-enabling the TRIM add-in in Outlook (Vista)						
7	Mitchell, Joni	2009-08-14 at 5:	TRIM tip - end user - removing a document or email						
8	Mitchell, Joni	2009-06-15 at 4:	TRIM tip - end user - speeding up search						
9	Mitchell, Joni	2009-05-19 at 5:	TRIM tip - end user - transitory record type						
10	Mitchell, Joni	2009-08-18 at 1:	TRIM tip - end user - wildcards						
11	Mitchell, Joni	2009-06-02 at 1:	TRIM tip - information manager - creating transitory records folder - version 2						
12	Mitchell, Joni	2009-08-19 at 3:	TRIM tip - information worker - exporting TRIM data to Excel						
13	Mitchell, Joni	2009-08-18 at 1:	TRIM tip - information worker - locations						
14	Mitchell, Joni	2009-08-19 at 11:	TRIM tip - information worker - printing classifications						
15	Mitchell, Joni	2009-08-18 at 2:	TRIM tip - information worker - relationships						
16	Mitchell, Joni	2009-08-17 at 3:	TRIM tip - information worker - requesting folder to be deleted						
17	Mitchell, Joni	2009-08-14 at 3:	TRIM tip - information worker - save a search						
18	Mitchell, Joni	2009-08-18 at 4:	TRIM tip - information worker - sorting columns						

Hint: If you export the Record Number, you can work with the data in the spreadsheet and then paste the record number from the Excel document into your TRIM Record Work Tray. From here you can open those records in TRIM.