

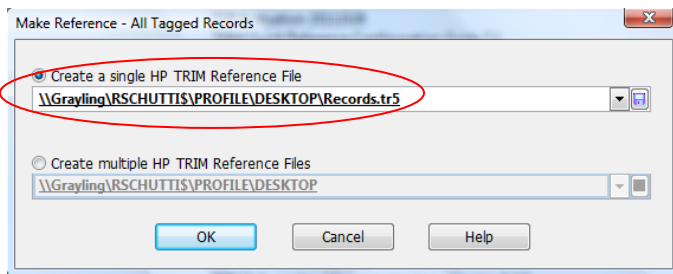
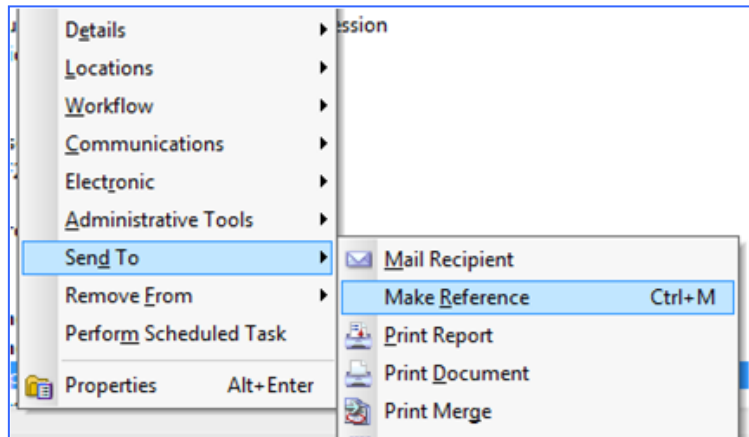
EDRMS TRIM Tip

Reference for a Group of Records

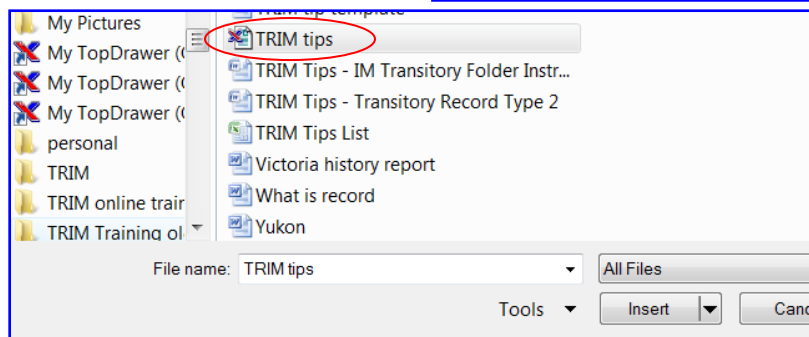
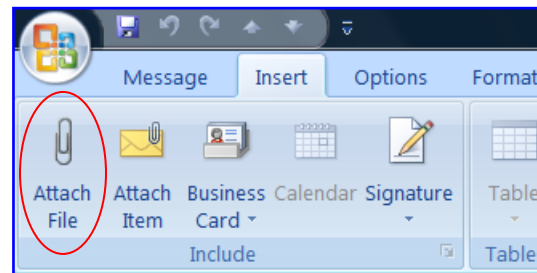
Primary audience: All Users

You can create a TRIM reference to a group of records, that can then be sent in an email to anyone using the same TRIM dataset.

1. Search for and tag the records in TRIM to be included in the reference.
2. Right-click on one of the tagged records and select **Send To | Make Reference** in the fly out menu.
3. Follow the screen prompts to save the records to your desktop or H: drive with the .tr# file name extension. Select **Create a single HP TRIM Reference File**. Click **OK**.



4. Create a new email. The recipient must be a TRIM user and have access to the relevant TRIM dataset.
5. Click the **Insert** tab on the Outlook toolbar and select **Attach File**. Browse for and locate the .tr# file and click **Insert**.



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Things to remember about references:

- Putting records in a reference does not remove or check out the records in TRIM, and therefore, does not affect others' ability to view or modify those records.
- The records in that reference file will always be current. If someone makes a change after you save a reference, you will see the updates when you open that reference.
- References maintain the sort order you saved them in.
- References will stay on your desktop, or whatever folder you put them in, until you delete them.
- You cannot add records to an existing reference.
- You can make a reference to locations and classifications as well as box, folder, or document records.