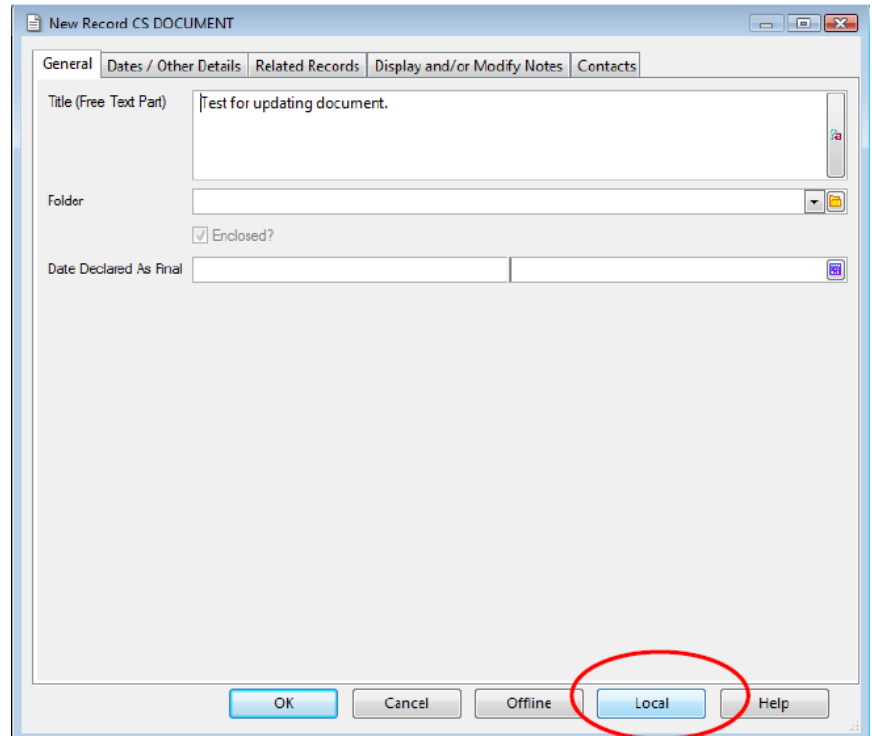


EDRMS TRIM Tip Drag and Drop Revisions

Primary Audience: All Users

Have you ever opened a document using TRIM Context, made a whole bunch of revisions, clicked on Save and then realised that the document has been opened as Read Only? **Frustrating!!** Don't worry, there's no need for all that time and effort to go to waste. It's easy to save your changes by using Drag and Drop to create a new revision of the document.

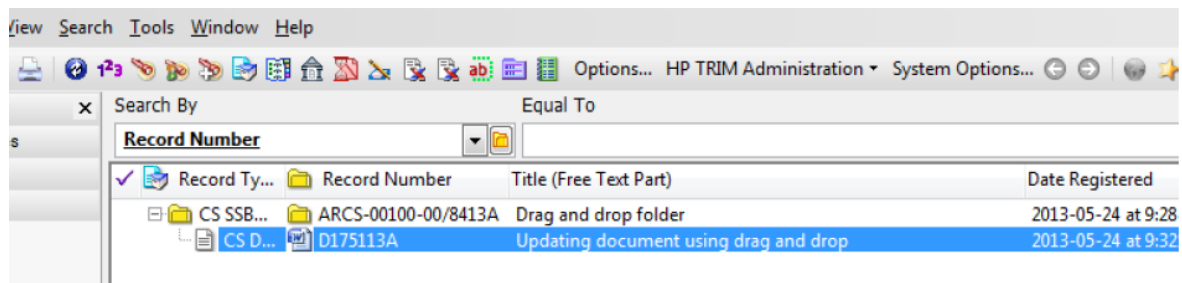
1. Save the updated document, using **Save As**. On the New Record form, choose **Local**, and follow the prompts to save to your Desktop.



The screenshot shows a dialog box titled "New Record CS DOCUMENT" with several tabs: "General", "Dates / Other Details", "Related Records", "Display and/or Modify Notes", and "Contacts". The "General" tab is active. It contains a "Title (Free Text Part)" field with the text "Test for updating document.", a "Folder" dropdown menu, a checked "Enclosed?" checkbox, and a "Date Declared As Final" field. At the bottom, there are buttons for "OK", "Cancel", "Offline", "Local", and "Help". The "Local" button is circled in red.

2. Close the document once it has been saved, otherwise you will get an error when you try to create your new revision.

3. At this point, make sure TRIM is open and the document you need to revise is highlighted.

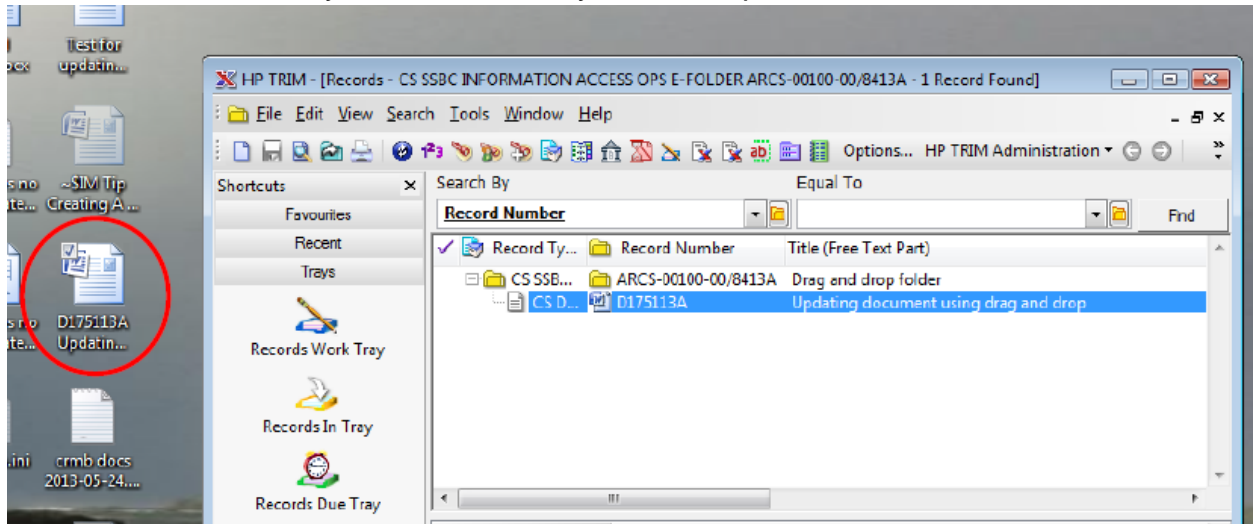


The screenshot shows the TRIM interface with a search bar and a list of records. The search bar is set to "Search By Record Number" and "Equal To". The list of records is as follows:

Record Ty...	Record Number	Title (Free Text Part)	Date Registered
CS SSB...	ARCS-00100-00/8413A	Drag and drop folder	2013-05-24 at 9:28
CS D...	D175113A	Updating document using drag and drop	2013-05-24 at 9:32

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4. Minimize TRIM, so you can see both your desktop and TRIM.



5. Click on the document on your desktop that you want to save as the new revision and drag and drop it on top of the highlighted version in TRIM.

6. When the Check In form appears, make sure that under **Return Type**, **Make a new Revision** is chosen, and click **OK**.

Voilà, all your hard work has been saved!

