

EDRMS TRIM Tip

Moving Documents from SharePoint to TRIM

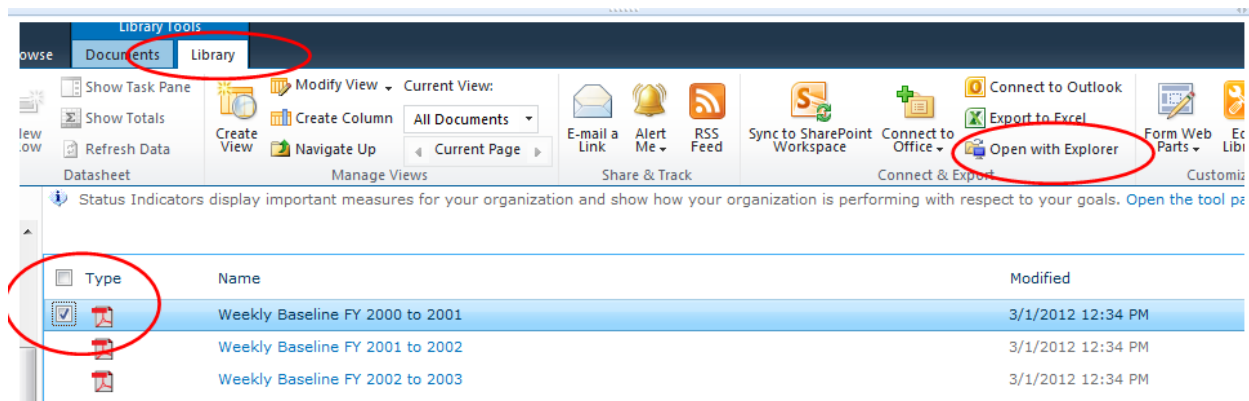
Primary Audience: All Users

SharePoint supports collaboration but lacks records management functionality. If your office uses TRIM for electronic records, your official records should be held in TRIM. Many offices keep the official records on the SharePoint site during the collaboration phase and then move them to TRIM to be filed and managed according to appropriate retention schedules.

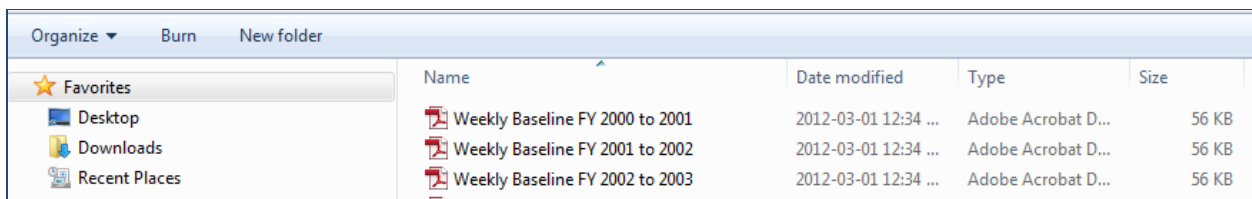
Here is an easy way to move records to TRIM from SharePoint.

***Hint:** make sure TRIM is integrated with all MS Office applications. If you aren't sure, refer to this Tip: Quick Reference Configuration Guide 7.2.1

1. Go to your SharePoint site and select **LibraryTools** / **Library** tab / **Open with Explorer** ***Note:** if the Library Tools tab isn't visible, tick the "Type" box or highlight a document.



2. This opens the documents in Explorer. They will look like this:



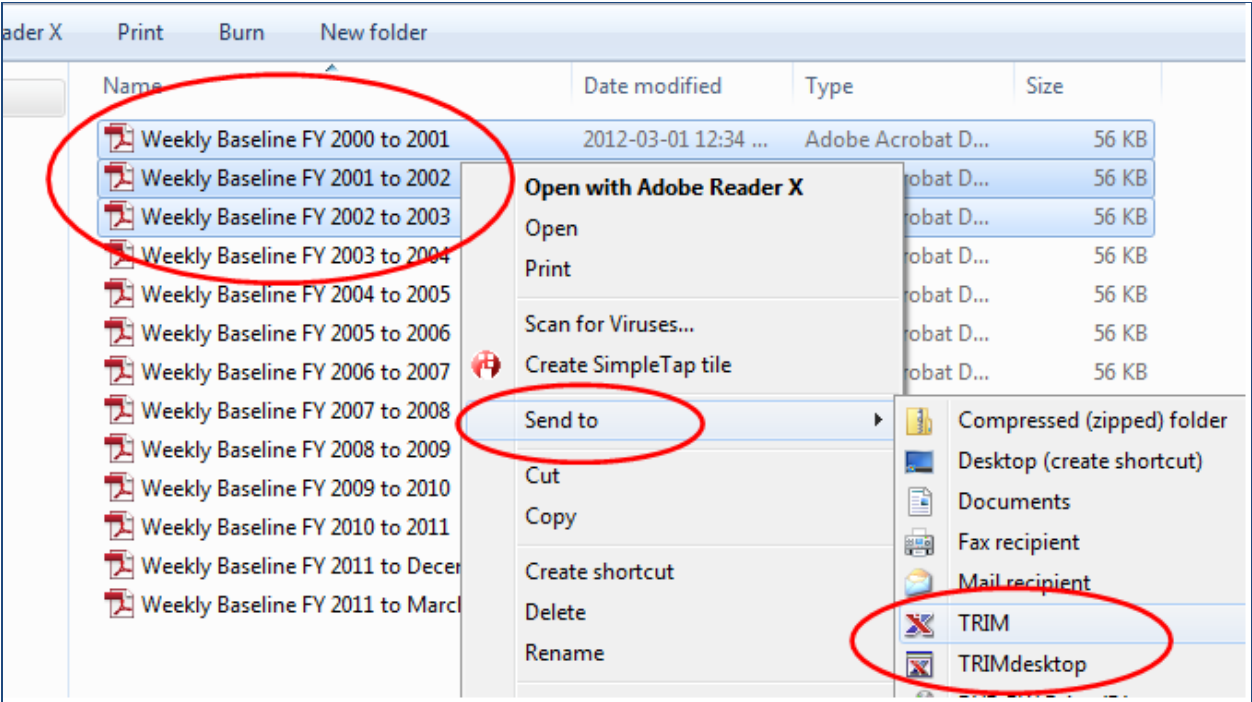
EDRMS TRIM Tip

Moving Documents from SharePoint to TRIM

3. Highlight the document(s) you want to move into TRIM. **Right click / Send to / TRIM (or TRIMdesktop).**

Hint: it works the same in TRIM or TRIM desktop.

Hint: keep your cursor over a highlighted document to ensure drop down menus appear.



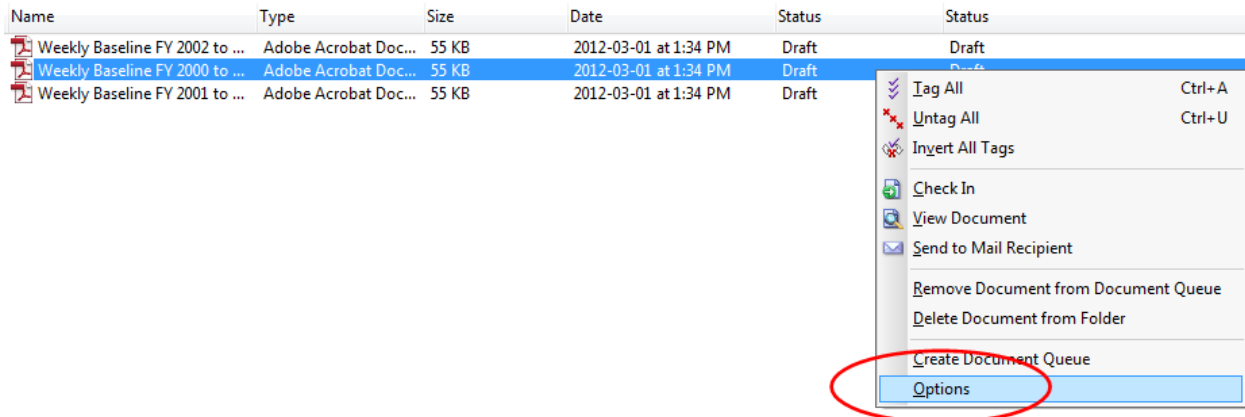
4. The documents are sent to TRIM and appear in a document queue, looking like this:

Name	Type	Size	Date	Status	Status
Weekly Baseline FY 2002 to ...	Adobe Acrobat Doc...	55 KB	2012-03-01 at 1:34 PM	Draft	Draft
Weekly Baseline FY 2000 to ...	Adobe Acrobat Doc...	55 KB	2012-03-01 at 1:34 PM	Draft	Draft
Weekly Baseline FY 2001 to ...	Adobe Acrobat Doc...	55 KB	2012-03-01 at 1:34 PM	Draft	Draft

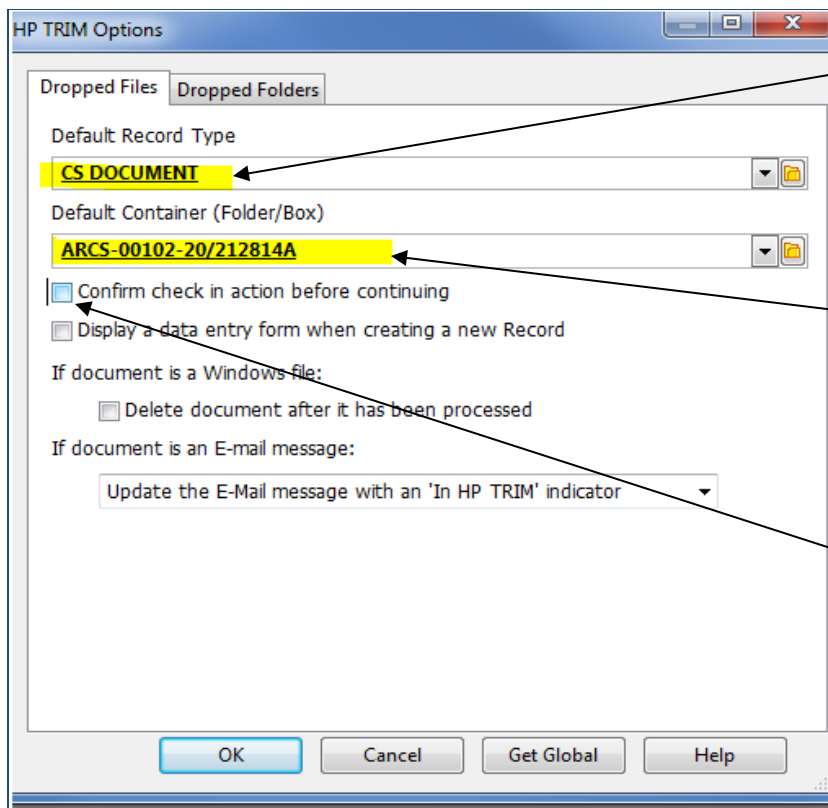
EDRMS TRIM Tip

Moving Documents from SharePoint to TRIM

5. Now select the e-folder you will file the documents into. **Right click / Options**



6. This brings up the HP TRIM Options box. Select **Dropped Files** tab, make sure document type in the **Default Record Type** field is correct and enter desired e-folder in **Default Container (Folder/Box)** field. Then **OK**



If you manage TRIM folders for more than one ministry, make sure the correct document record type is in the **Default Record Type** field.

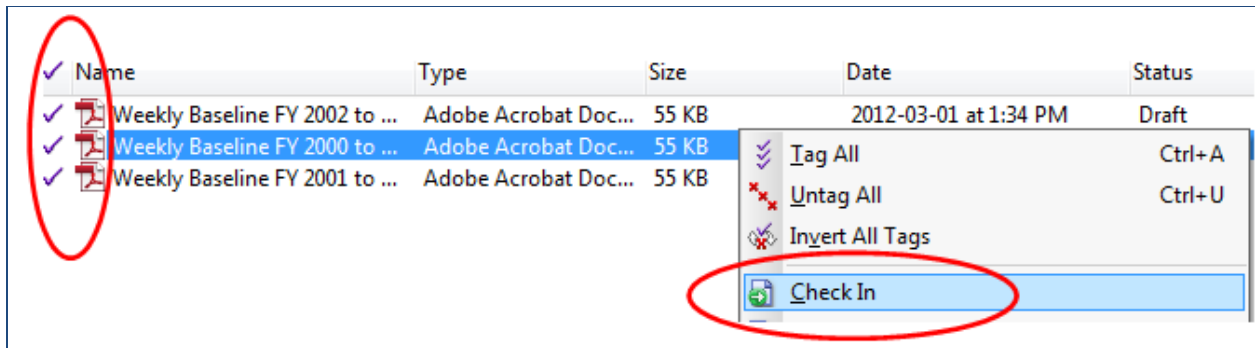
Enter the e-folder you want the documents to go into in the **Default Container (Folder/Box)** field. **Note:** if you didn't clear the field last time you did this function, the previous folder will show up.

If you tick "**Confirm check in action before continuing**" you will need to confirm filing action for each document. If you want the entire batch to go to the file at once, don't tick the box.

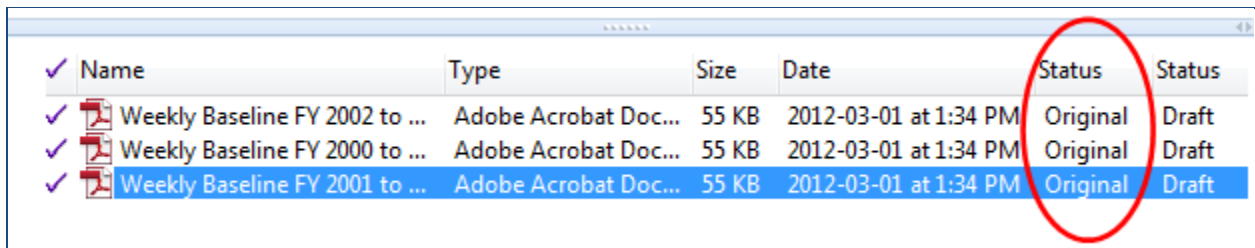
EDRMS TRIM Tip

Moving Documents from SharePoint to TRIM

- Once you have selected the e-folder, TRIM returns to the document queue. Now move the documents into the e-folder you just selected: **Tag All / right click / Check In**



- You have now “checked in” (moved) the documents into the selected folder. You can verify this by noting whether the first status column has changed from “Draft” to “Original”.



- Exit the document queue screen (click the “x” on the upper right corner of the TRIM screen). The documents are in the e-folder you checked them into.
- Go back to your Share Point site and clean it up by deleting the documents, because you now have your official file copy in TRIM.