

EDRMS TRIM Tip Quick Reference Guide for TRIM 7.2.1

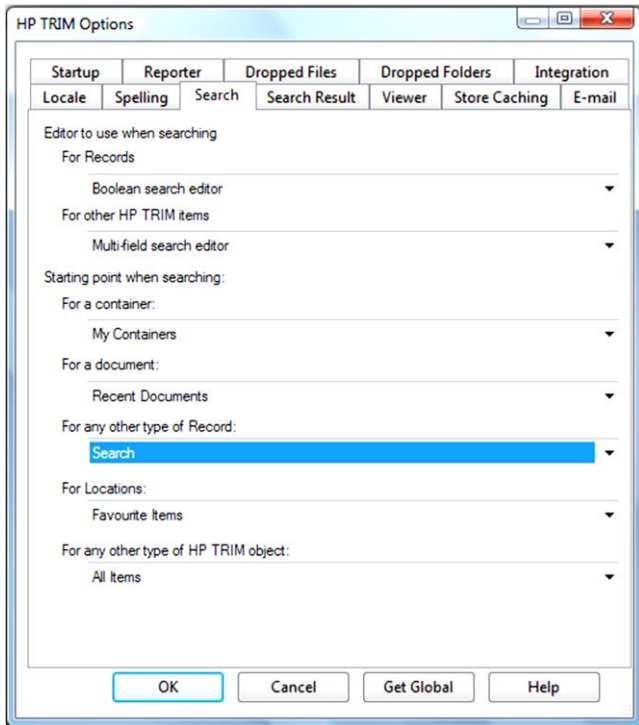
Starting TRIM Desktop

Double-click on the shortcut icon on your desktop or use the

Configuration Settings

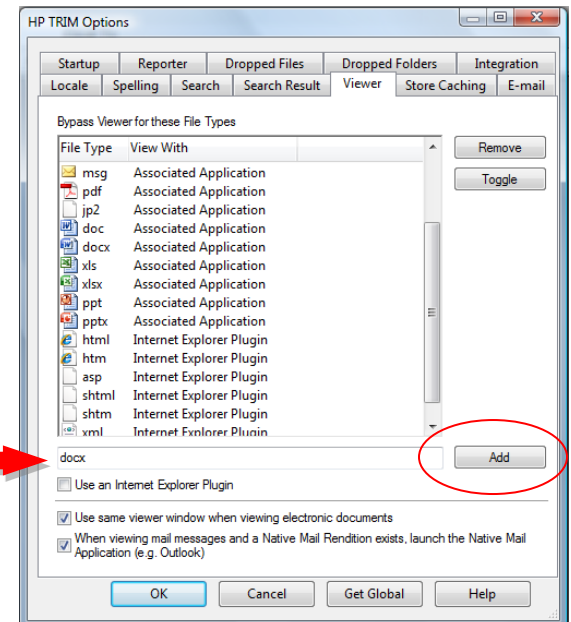
From the main menu select: Tools > Options.

Search Tab

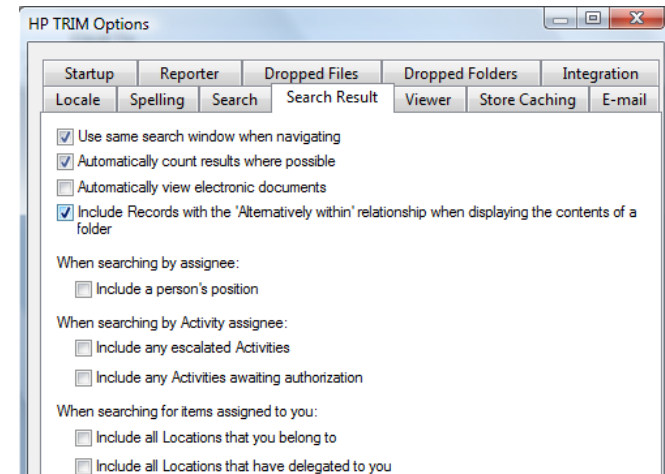


Viewer Tab

To add any missing file types to the Bypass Viewer list, type the file type extension in here and click Add. Common missed extensions are .doc, .docx, .dwg, .mpp, .ppt, .pptx, .xls, .xlsx, .TR5 and .zip.



Search Results Tab



EDRMS TRIM Tip Quick Reference Guide for TRIM 7.2.1

Integration

This is a two step process. First, go to the Integration tab. Select these options, then press OK.

Enter your default document Record Type here.

To complete the integration configuration next go to: Tools > HP TRIM Desktop Add-Ins

HP TRIM Options

Locale Spelling Search Search Result Viewer Store Caching E-mail

Startup Reporter Dropped Files Dropped Folders Integration

When using HP TRIM from an integrated authoring application:

- Work directly with HP TRIM
- Allow access to Windows File Open and Save Dialogs
- Display advanced HP TRIM menus when selecting Records
- Always use the default Record Type when doing Save As directly with HP TRIM

Use the following Record Type when creating new documents (optional):

CS DOCUMENT

- When checking in draft documents from Offline Records, use advanced check in form
- When deleting a container from Offline Records, ask for confirmation first
- When a container from Offline Records becomes empty, automatically delete it

OK Cancel Get Global Help

Dropped Files Tab

Enter your default document Record Type here.

Change to "Update the E-Mail message with an 'In HP TRIM' indicator"

HP TRIM Options

Locale Spelling Search Search Result Viewer Store Caching E-mail

Startup Reporter Dropped Files Dropped Folders Integration

Default Record Type

CS DOCUMENT

Default Container (Folder/Box)

- Confirm check in action before continuing
- Display a data entry form when creating a new Record

If document is a Windows file:

- Delete document after it has been processed

If document is an E-mail message:

Update the E-Mail message with an 'In HP TRIM' indicator

OK Cancel Get Global Help

HP TRIM Desktop Add-Ins

General

Integrate HP TRIM with the following Microsoft Office authoring applications:

- Microsoft Word
- Microsoft Excel
- Microsoft PowerPoint
- Microsoft Project
- Microsoft Word (for Document Assembly)

HP TRIM supports ODMA for integrating with other ODMA-compliant authoring applications:

- Integrate HP TRIM with ODMA-compliant authoring applications

Integrate HP TRIM with the following E-Mail applications (see Help - E-Mail integration for details on integration with Lotus Notes):

- Microsoft Outlook
- Novell GroupWise

Test

OK Cancel Help