

Here are a few simple ways you can use EDRMS TRIM more effectively. Please review your office's information practices and keep up the great work. Send your questions to [EDRMS HELP](#).

- 1. Avoid saving .ZIP files in TRIM.** You will not be able to search for the records contained in any .zip files stored in TRIM. ZIP files aren't indexed by TRIM.
- 2. Use our TIP [Migrating from the LAN to TRIM](#).** In the case of converting records from LAN folders to TRIM, there is a need to analyze and plan out conversions that will result in well organized and usable records in TRIM that can be effectively accessed and managed over time. Talk with your [Records Officer](#) about LAN Organization and TRIM strategies if you have questions.
- 3. Avoid saving .PST files in TRIM.** .PST files are problematic and should generally be avoided. There are better approaches to email management, for instance linking Outlook folders to TRIM. Saving .pst files to TRIM is not advisable because a search will not find anything in the .pst file. PST files aren't indexed by TRIM. Learn how to link Outlook email folders to TRIM to catalogue items efficiently using pages 37-41 of [this guide](#).
- 4. Avoid saving files larger than 60 MB in TRIM.** Large files can impact performance. TRIM's index performs best when files are limited to 60 MB or less. If you need to file emails with many large attachments, file the attachments separately.
- 5. Avoid filing more than 300 documents in an electronic folder.** Another practice that can impede TRIM performance is filing more than 300 documents into an electronic folder. TRIM's index performs best when folders are limited to 300 documents or less. If you have more than 300 items, create more than one folder, or create multiple parts to the folder. You can create as many parts as needed (and each part can contain up to 300 items). Good naming conventions applied to the title and retrieval fields will help connect multiple files (for example, standard contract and project numbering). If you're filing a high volume of images (TIFF, JPEG) ensure that you change the free text title from the image number and use consistent naming conventions to ensure the image is identifiable.
- 6. Don't forget to run Text Recognition on documents to support retrieval.** When scanning documents, using the [Optical Character Recognition \(OCR\)](#) in software such as Adobe helps you to search within the document. When saving .pdfs in particular, remember to OCR documents. A scanned document is just an image with no text, and cannot be indexed. OCR creates text, which is then searchable in TRIM.

7. **Finalize documents where appropriate.** A TRIM document can be made **Final**, after which no other changes can be made to the document. Once a document is finalized, you may however, make a Super Copy of the document to use as the starting point for a new document.
8. **Create MS Office documents directly in TRIM.** Save documents in TRIM immediately to facilitate collaboration, shared editing, and to preserve revision control.
9. **Share documents using a TRIM reference** rather than attaching the electronic document whenever possible. The electronic document should only be shared if you are emailing a non-TRIM user.
10. **Saving email into TRIM? Catalogue directly to TRIM or use Linked Folders in Outlook.** Saving emails to your LAN first and then to TRIM will alter the integrity of the metadata; the dates will also be incorrect as TRIM will use the date saved to your LAN instead of the date of the e-mail.
 - Don't drag and drop on multiple emails from Outlook to TRIM, because TRIM will file them as .msg files, not .vmbx files. .MSG files result in fewer metadata fields. More metadata fields facilitate searching. Filing one email at a time with drag and drop works fine.
 - Use the TRIM specific menus (Right Mouse Click or the Add-ins on the Outlook Toolbar) to preserve document integrity, and ensure that the appropriate metadata is available for more comprehensive searching.

Need Records Management assistance? Contact your [Records Officer](#).

Need a TRIM refresher? Sign up for [TRIM training](#) that suits your needs.

Watch for Records Management [Community of Practice](#) sessions on TRIM

Need help with TRIM? Review [TRIM TIPS and Guides](#)

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