

Excel 2007 Add-in

What:

This will allow you to save directly into TRIM from your Excel Spreadsheet. E.g. Drag and Drop a whole heap of information onto excel, format it and then save to TRIM. Job done! Without saving anything to your hard drive.

Why:

This will save you time by cutting out the step of saving to your hard drive. So if you have to regularly work in TRIM will mean you will have more time to do other tasks.

How:

Step 1:

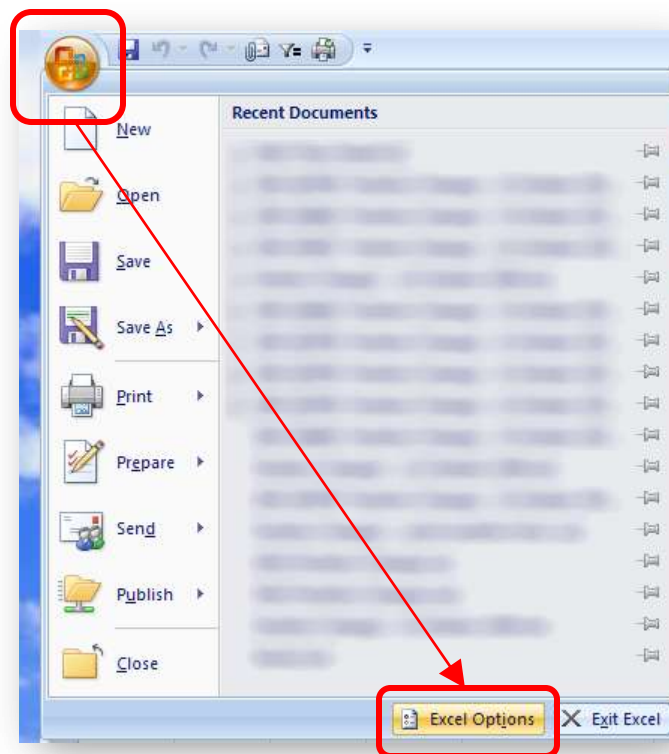
Open Excel and ensure TRIM is installed.

Step 2:

Click on the circular Office button.

Step 3:

Click on Excel Options.

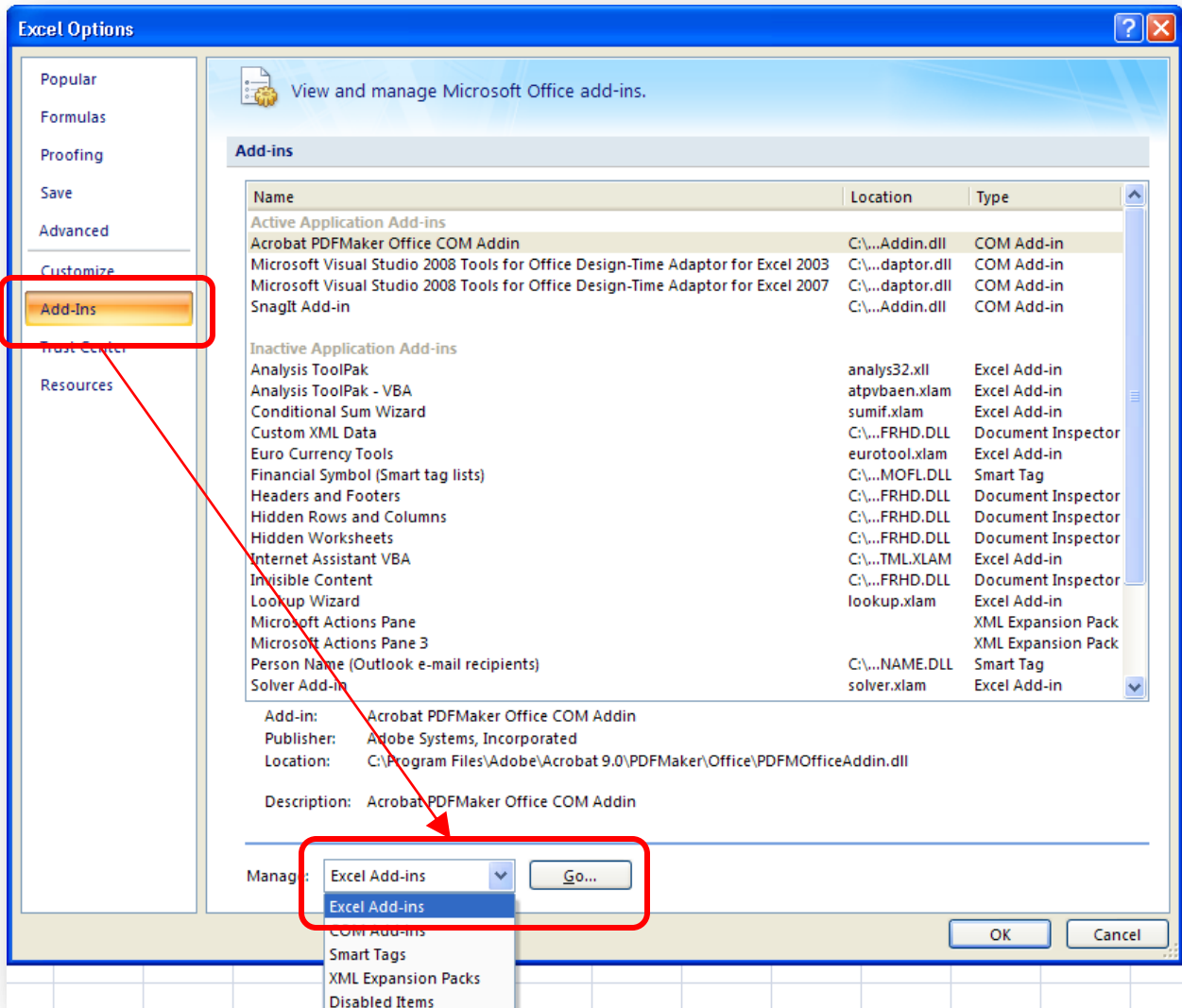


Step 4:

Click on 'Add-ins' on the left hand side.

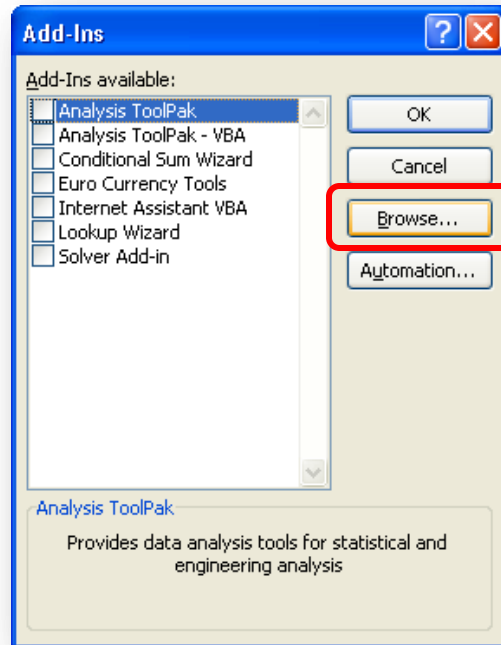
Step 5:

On the right hand side, under 'Manage' use the drop down field to make sure 'Excel Add-ins' is selected and Click on 'Go'.



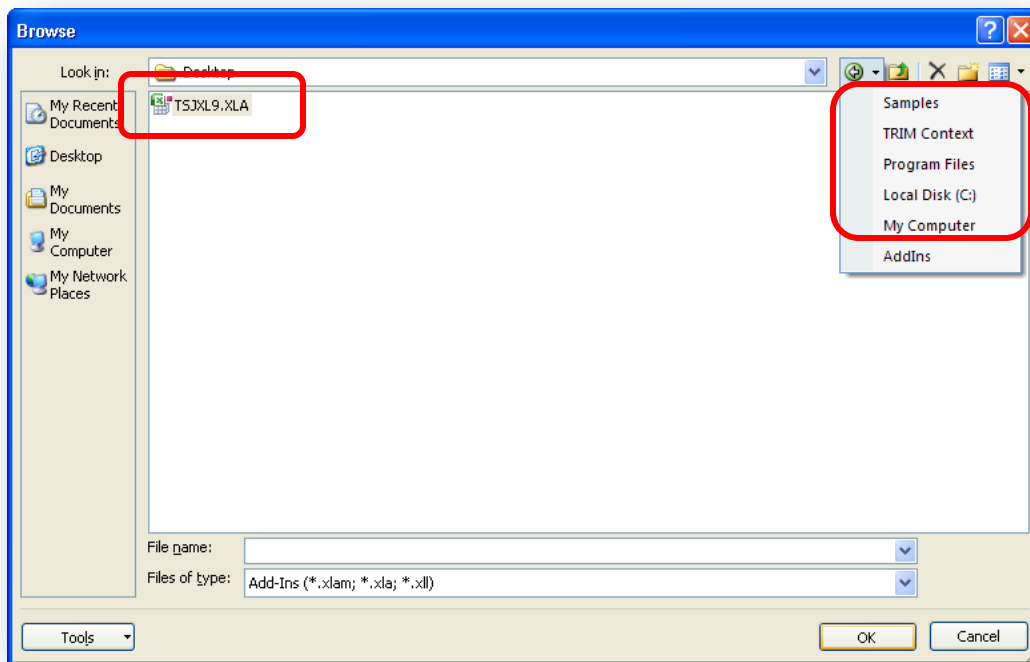
Step 6:

Click on 'Browse'.



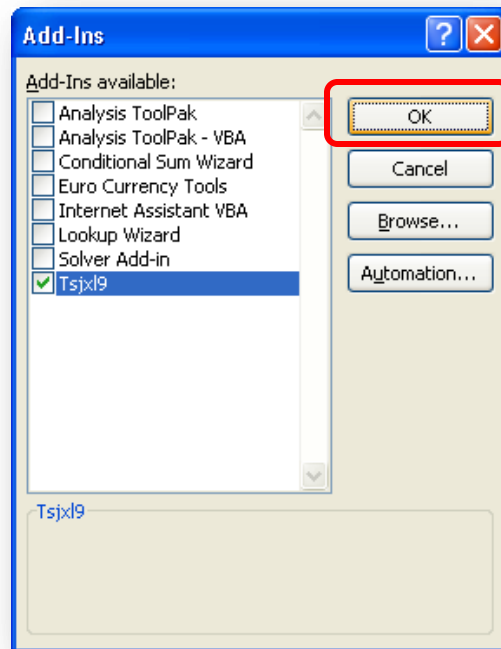
Step 7:

Navigate to **C:\Program Files\TRIM Context\Samples\Desktop** and double click on TSJXL9.XLA



Step 8:

Click on Ok. An 'Add-ins' Tab will now be available to you on your Office Ribbon.

**Tips:**

When Saving to TRIM (using the save as button under Menu commands then completing the records creation screen) it is important to note that you must close Excel before the document will appear in TRIM.

**Outcomes:**

- How to Setup Excel for TRIM integration