

TRIM CHEAT SHEET

CREATE - DRAG N DROP

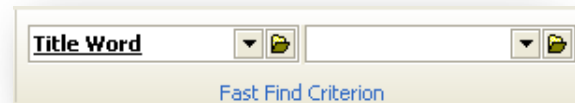


1. **Locate** the container where you want to store the document.
2. **Drag** the document and drop it right on top of the container in TRIM (icon or title).

RECORD TITLING

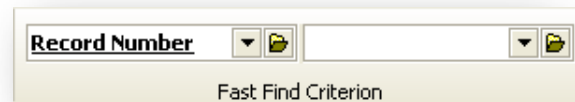
1. The **date** in full, e.g. 17 June 2009.
2. The **names** of the parties involved.
3. The name of the **event** or the **subject**.
4. Titles must be **specific**.
5. Titles must be **useful**.
6. **Descriptive** words.

SEARCH – TITLE WORD




1. Under Fast Find Criterion, use the left drop down arrow to **select 'Title Word'** search.
2. In the box to the right, type in your **keywords** like you would if you were using **Google**.
3. Hit Enter.

SEARCH - RECORD NUMBER



1. Under Fast Find Criterion, use the left drop down arrow to **select 'Record Number'** search. If Record number is not there click on the yellow folder on the right of the drop down arrow and select 'Record Number' under 'Numbers'.
2. In the box to the right, type in your **TRIM record number** (e.g. D09/1234 or A09/4321). Hit Enter.

OUTLOOK – TRIM AN E-MAIL

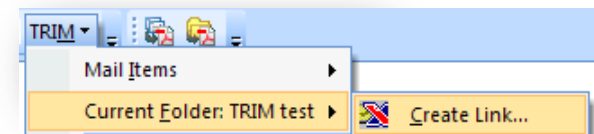
1. **Highlight** the e-mail in your inbox.
2. Click on the **'Catalog'** Button in the Outlook TRIM toolbar 

OUTLOOK – E-MAIL OUT OF TRIM



1. Click on the document you wish to send (or tick multiple documents).
2. Click on the **'Mail Recipient' Icon**.
3. Tick the relevant boxes (e.g. TRIM Record Reference and Electronic Document). Click OK.
4. Type your e-mail and click 'Send'.

OUTLOOK – LINK TO TRIM CONTAINERS



1. With the folder selected, Click on the drop down arrow in the **Outlook TRIM toolbar**.
2. Hover your mouse on Current Folder. Then click **'Create Link'**.