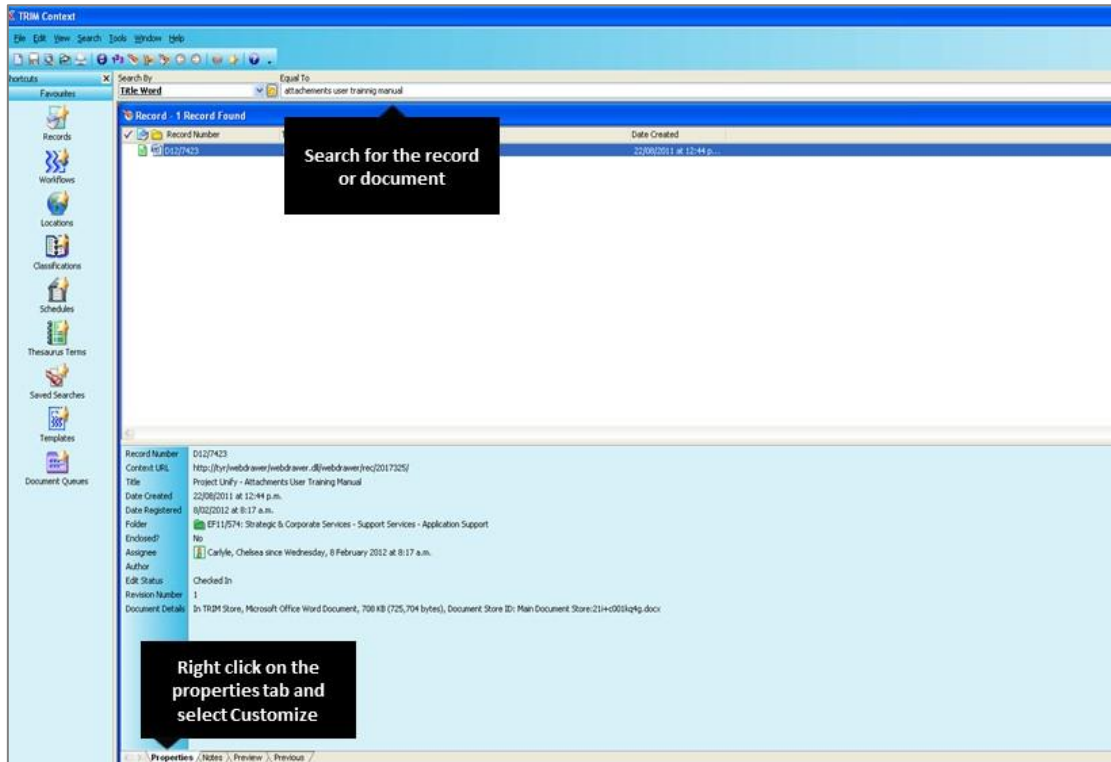


## A. Context URL method

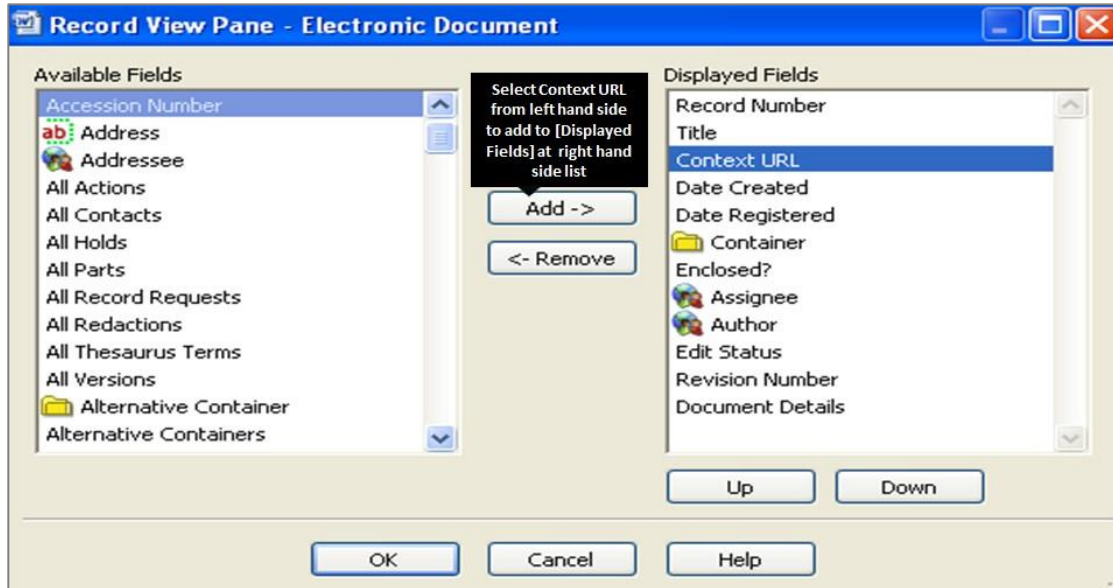
### Extract document URL from TRIM

- a. Open TRIM and search for the document
- b. In the **[Properties]** tab at the bottom right click and select **[Customize]**

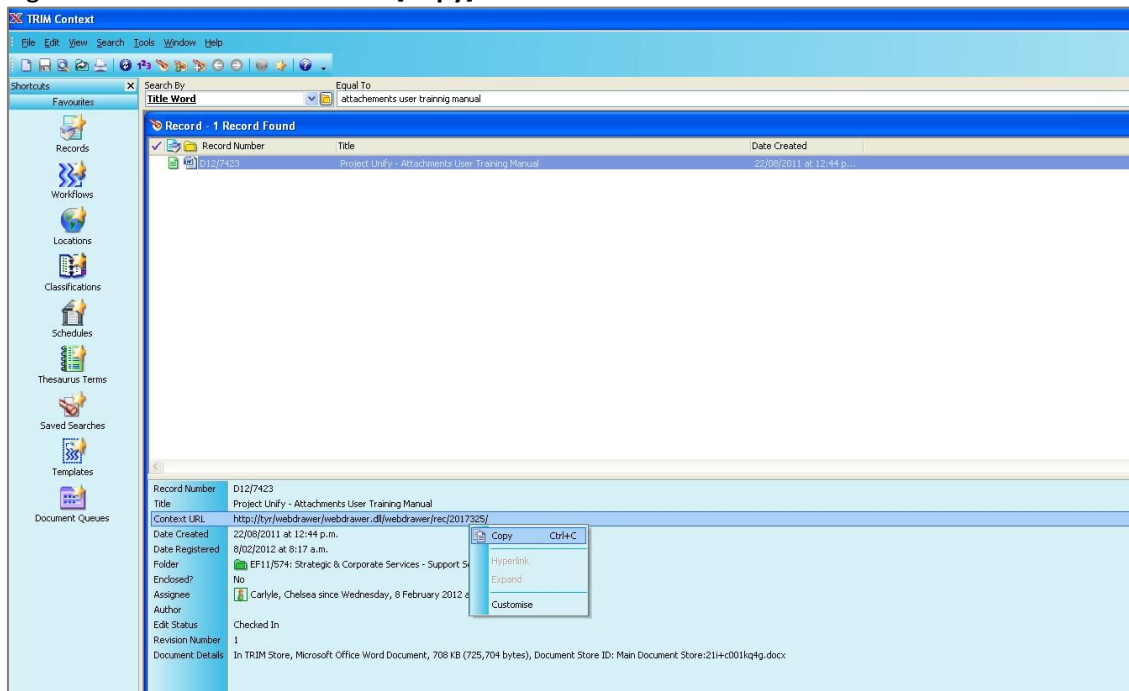


- c. **Record View Pane** window will appear

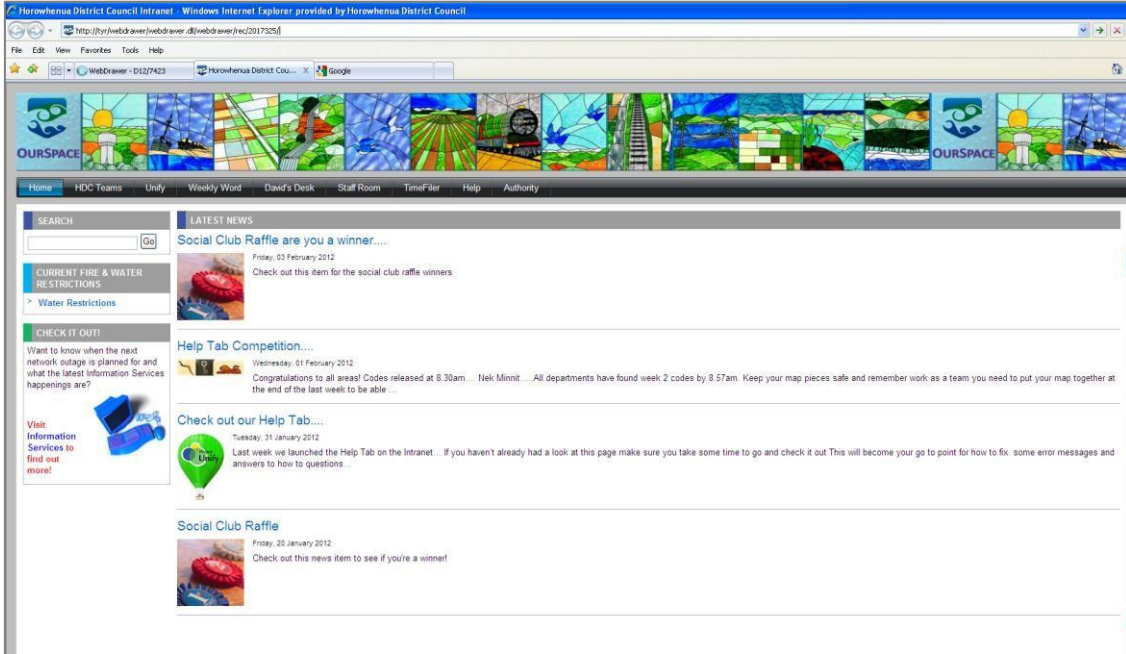
d. Scroll down on the left hand side until you find [**Context Url** ], select this and click [ **Add** ] so that it appears in the list to the right hand side. Click [**Ok**] to save your changes and close this box.



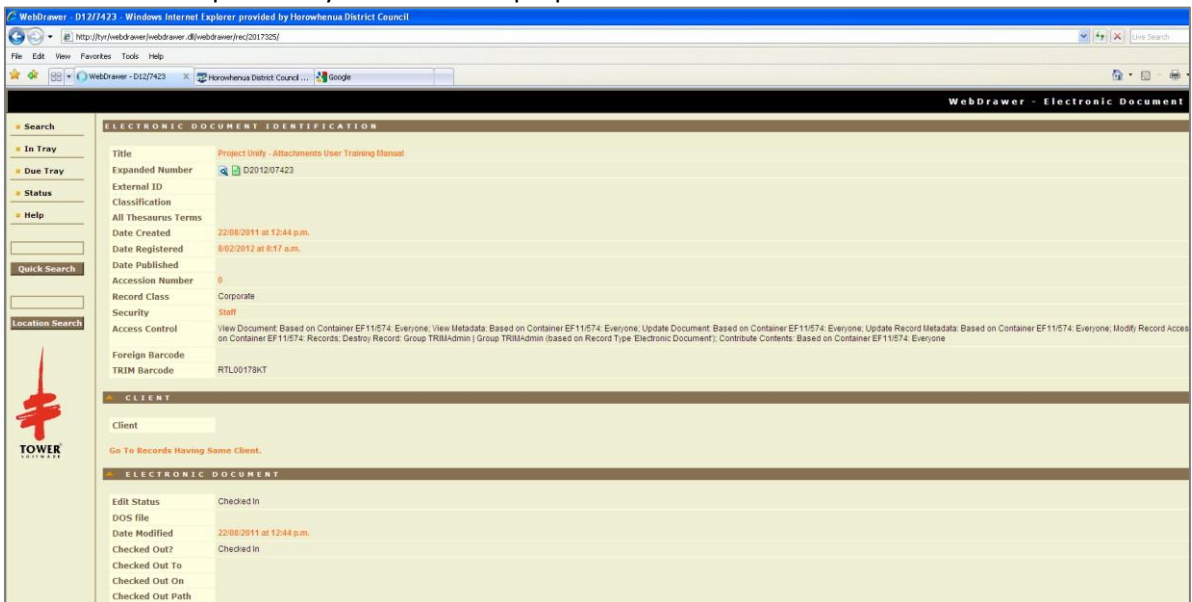
- e. [**Context URL**] field should be displayed in the Properties box
- f. Right click on this box and select [**Copy**]



g. Open Internet explorer and paste this link into the address bar and hit enter



h. Webdrawer will open with your document properties on screen.



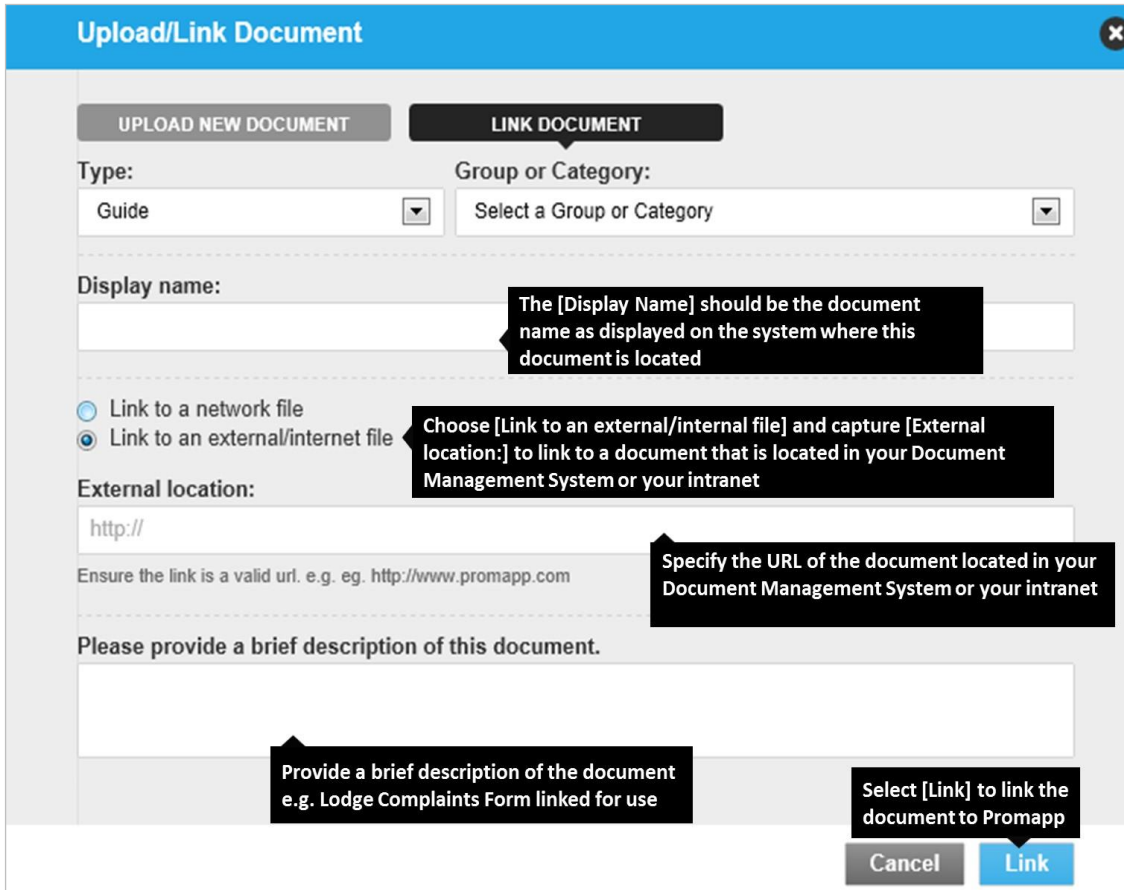
- i. Right-click on the document name and select [**Copy Shortcut**] , note this URL link



## Add TRIM document link to Promapp Process / Document List

- a. **Prerequisites** : please ensure:
- i) Users have added Promapp site to the trusted site list [in IE] to access file(s) linked to TRIM
  - ii) The TRIM document URL link has been added as valid URL on your Promapp site - send the TRIM document URL link to [support@promapp.com](mailto:support@promapp.com) and request it be added
- b. Open Promapp and edit the process you want the document to link to , or select [**Documents** > **Add a new document** ] option from the master banner menu as applicable
- c. Navigate to [**Link Document** ]tab on [**Upload / Link Document** ] window
- d. Select an appropriate type of the document from the [**Type**] dropdown

- e. Select process group or category from the [Group or Category ] dropdown if known



The screenshot shows the 'Upload/Link Document' dialog box. It has a blue header with a close button. Below the header are two tabs: 'UPLOAD NEW DOCUMENT' and 'LINK DOCUMENT'. The 'LINK DOCUMENT' tab is active. The form contains the following fields and callouts:

- Type:** A dropdown menu with 'Guide' selected.
- Group or Category:** A dropdown menu with 'Select a Group or Category' selected.
- Display name:** A text input field. Callout: 'The [Display Name] should be the document name as displayed on the system where this document is located'.
- Link options:** Two radio buttons: 'Link to a network file' (unselected) and 'Link to an external/internet file' (selected). Callout: 'Choose [Link to an external/internal file] and capture [External location:] to link to a document that is located in your Document Management System or your intranet'.
- External location:** A text input field containing 'http://'. Callout: 'Specify the URL of the document located in your Document Management System or your intranet'. Below the field is the text: 'Ensure the link is a valid url. e.g. eg. http://www.promapp.com'.
- Description:** A text area with the prompt 'Please provide a brief description of this document.' Callout: 'Provide a brief description of the document e.g. Lodge Complaints Form linked for use'.
- Buttons:** 'Cancel' and 'Link' buttons. Callout: 'Select [Link] to link the document to Promapp'.

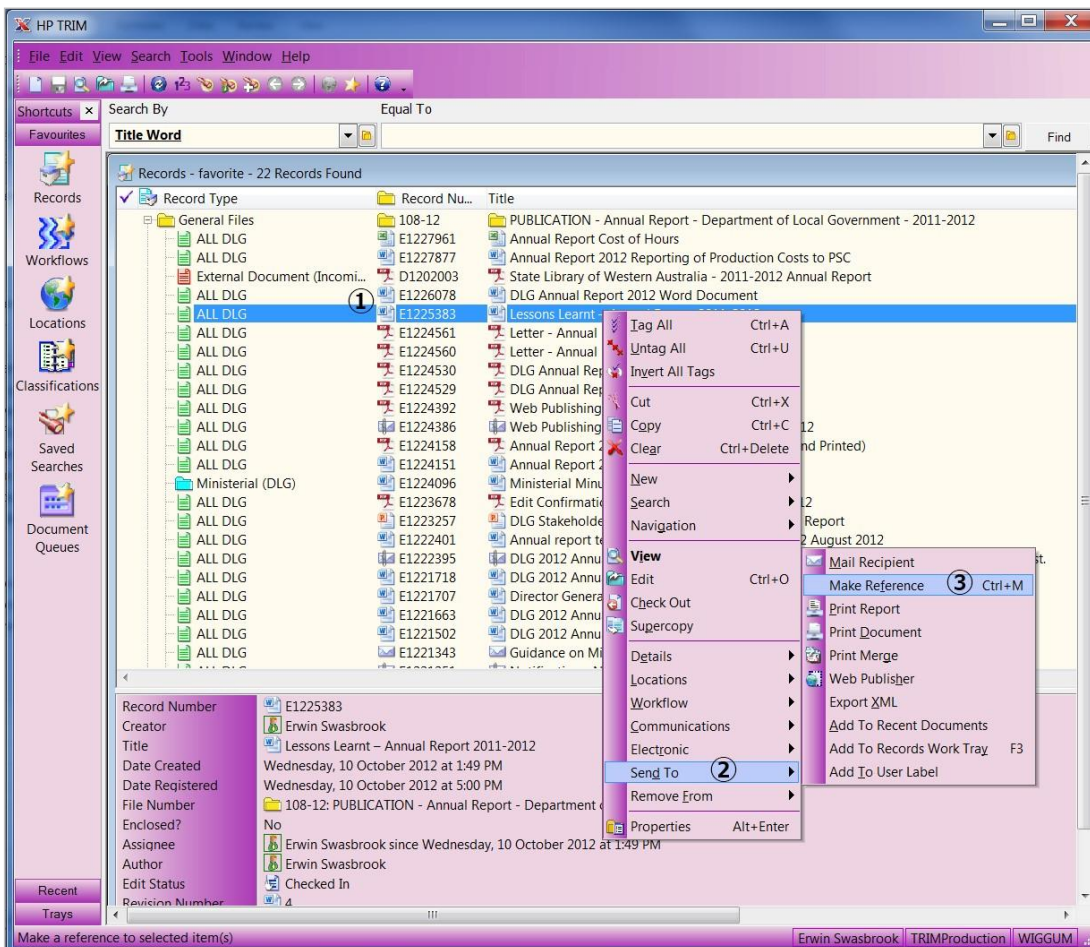
- f. Enter brief description of the document and click [ Link ]
- g. Navigate to the [Process Map / Procedure] view or navigate to the chosen [Type] tab at **Document List**, this will list the newly uploaded document. On clicking this link – this will open the document from TRIM



## B. File [.tr5] link method

### Extract [.tr5] file from TRIM

- a. Open TRIM and chose the file to connect to [file type .tr5] , right click on the file
- b. Select [Send To] and the select [Mark Reference]



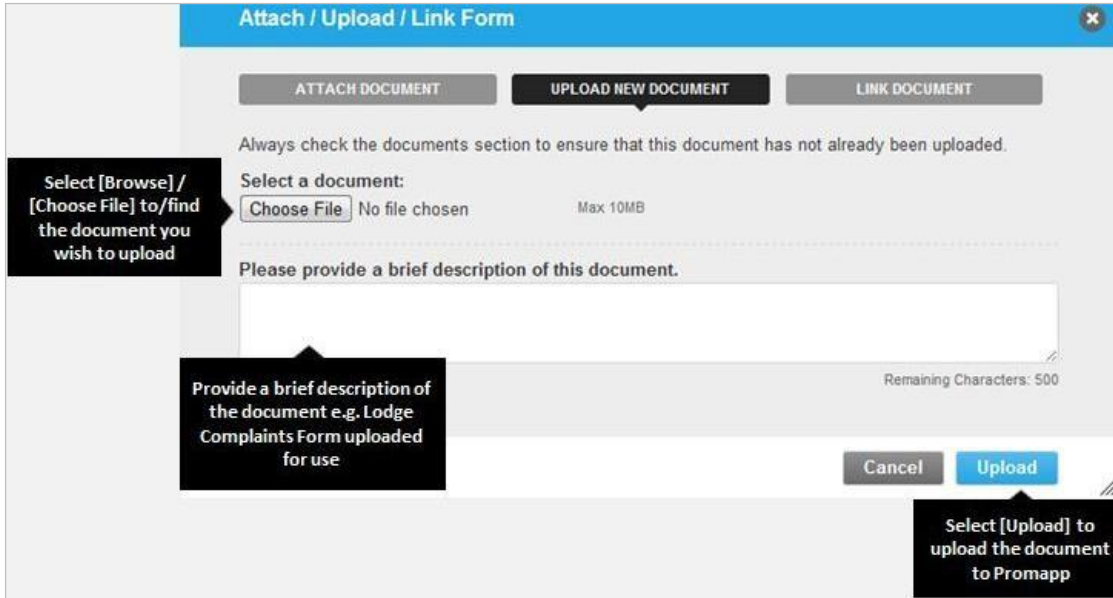
- c. [Mark Reference] will launch a Save Dialogue Box
- d. Save the "Reference" file (.tr5) to your desktop by renaming within the file name field if required.

## Add TRIM document link to Promapp Process / Document List

- a. **Prerequisites** : please ensure:

The TRIM document extension [.tr5] has been added as accepted file format on your Promapp site - send the file extension to [support@promapp.com](mailto:support@promapp.com) and request it be added

- b. Open Promapp and edit the process you want the document to link to , or select [**Documents** > **Add a new document** ] option from the master banner menu as applicable
- c. Navigate to [**Upload Document** ]tab on [**Attach / Upload / New Document** ] window
- d. Browse and select the TRIM file with [.tr5] extension that you have just saved on your desktop
- e. Provide a brief description and click [**Upload**]



- f. Navigate to the [**Process Map / Procedure**] view or navigate to the chosen [**Type**] tab at **Document List**, this will list the newly uploaded document. On clicking this link – this will open the document through the TRIM application.