promapp
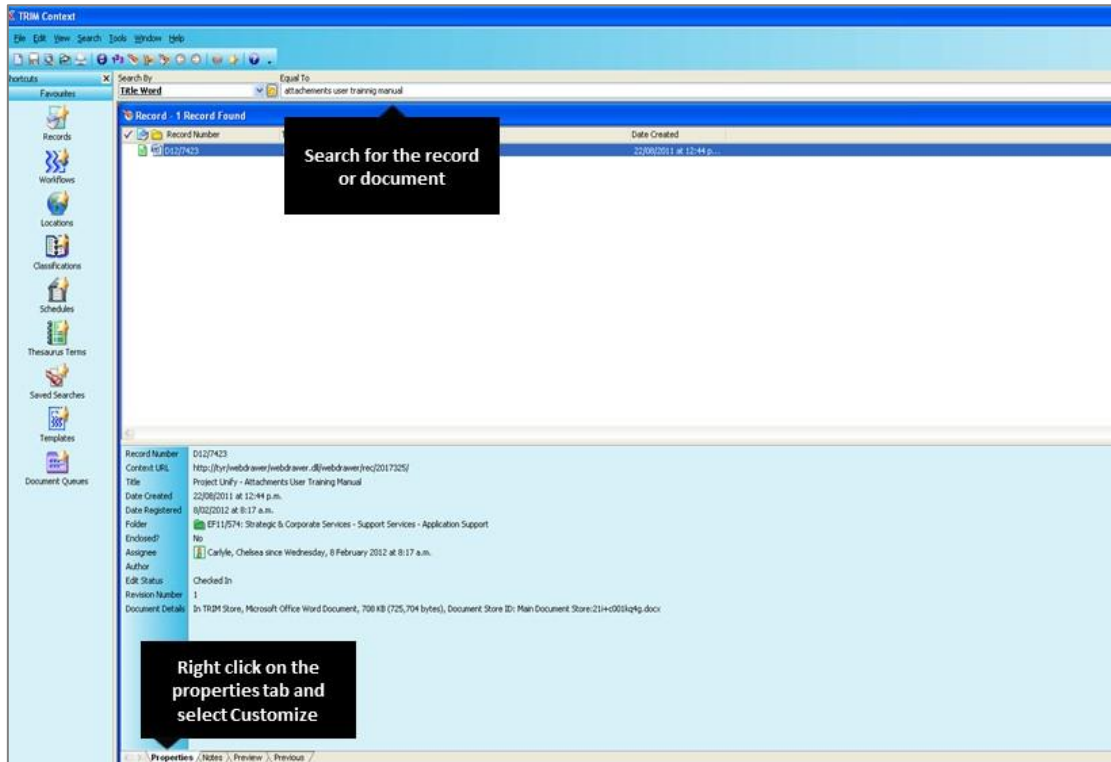
A. Context URL method

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.
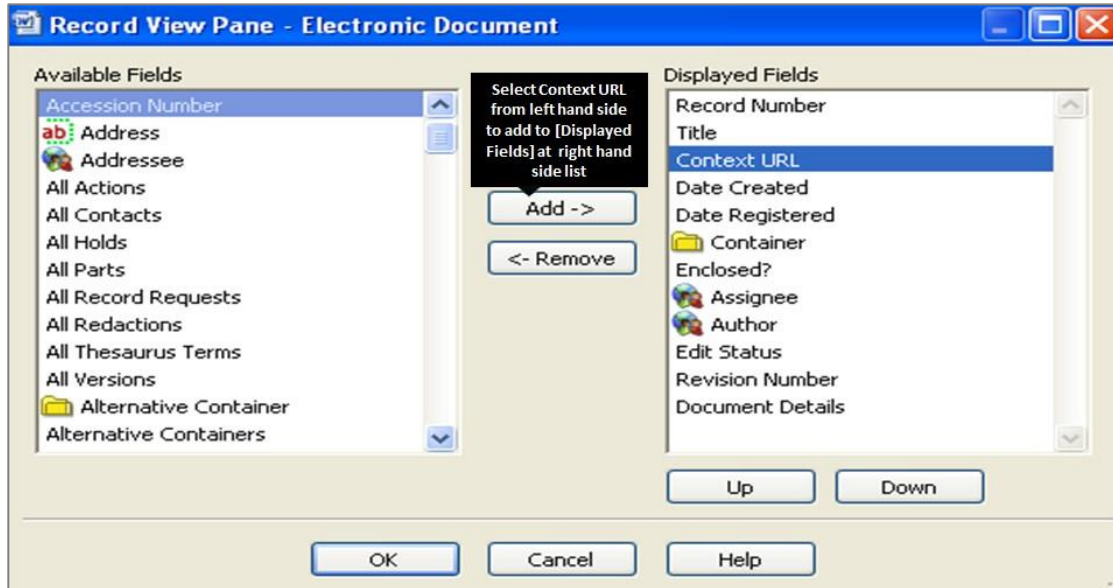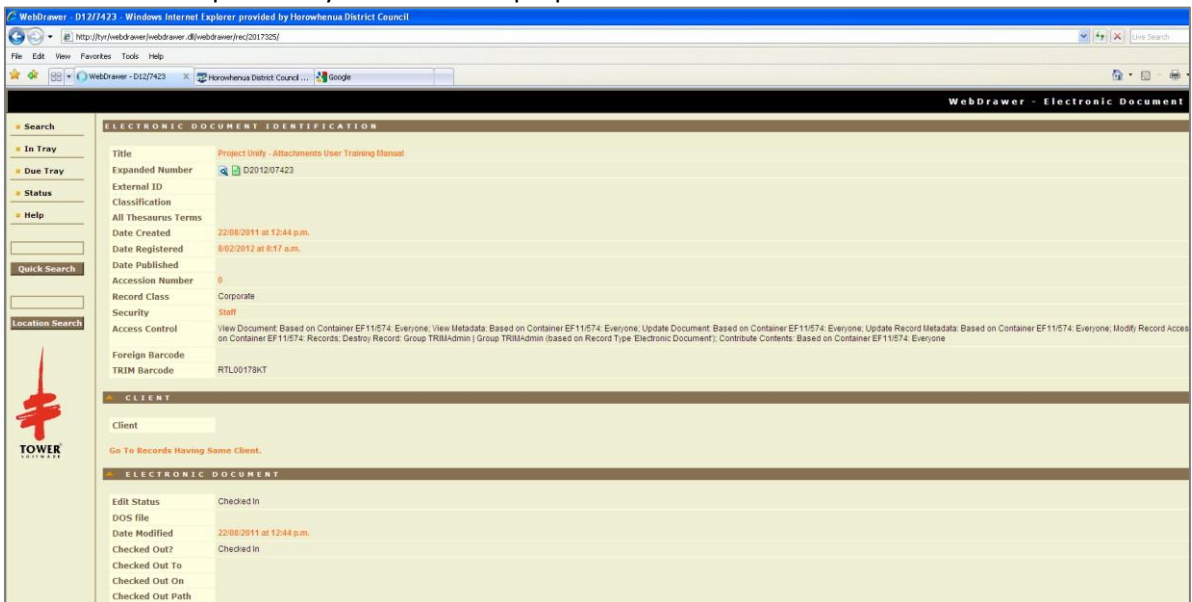

e.   [**Context URL**] field should be displayed in the Properties box

f.   Right click on this box and select [**Copy**]

LINK TRIM DOCUMENT TO PROMAPP
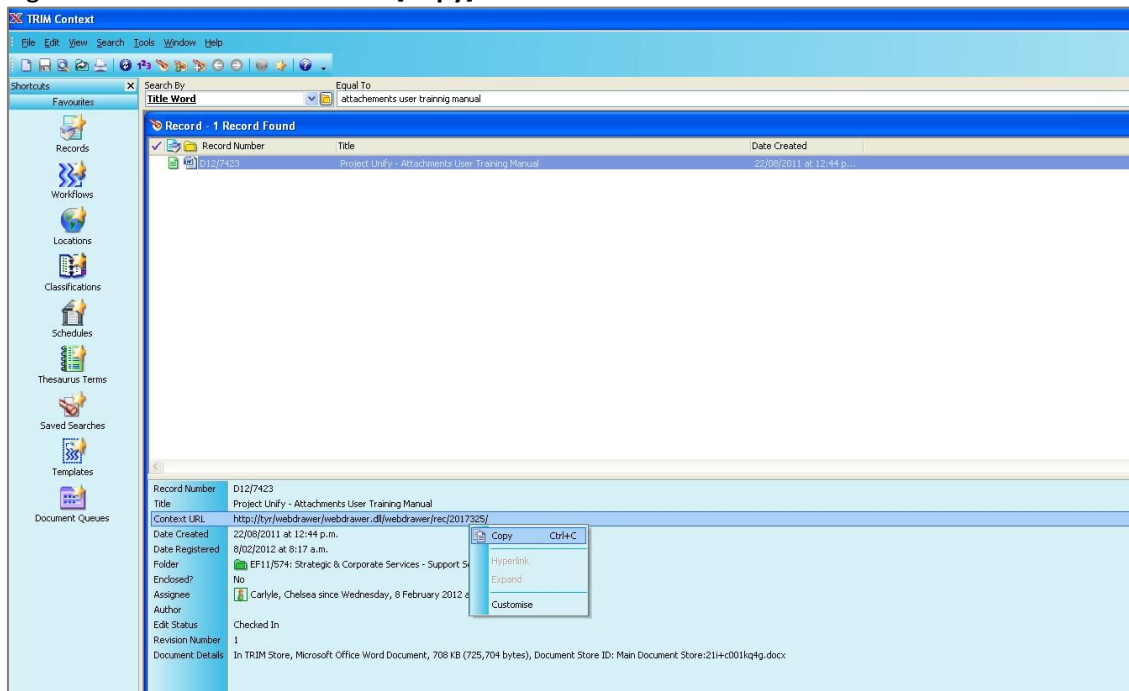
g. Open Internet explorer and paste this link into the address bar and hit enter
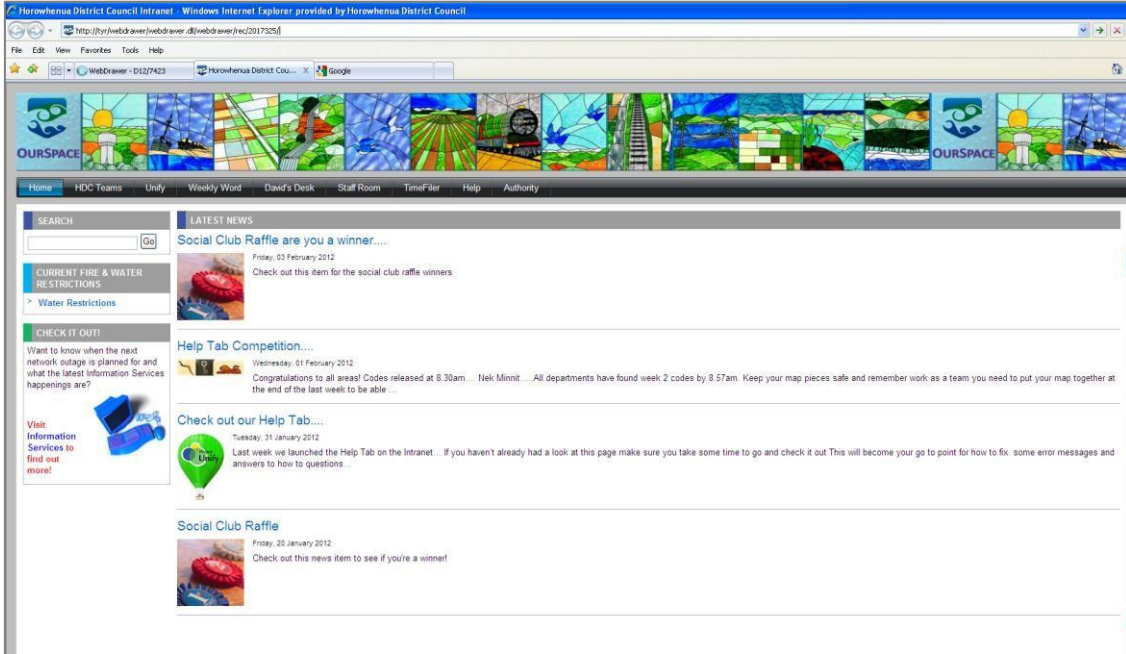
h. Webdrawer will open with your document properties on screen.
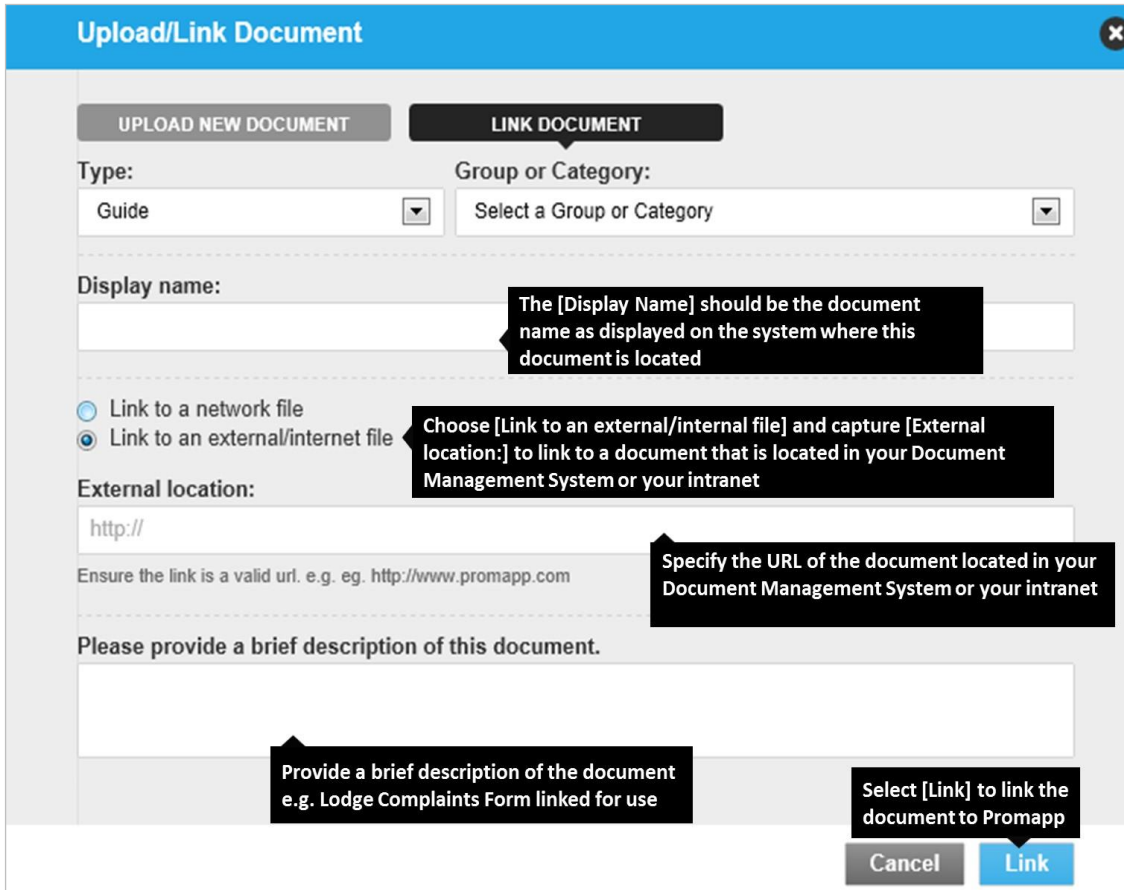
LINK TRIM DOCUMENT TO PROMAPP

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 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

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LINK TRIM DOCUMENT TO PROMAPP

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

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

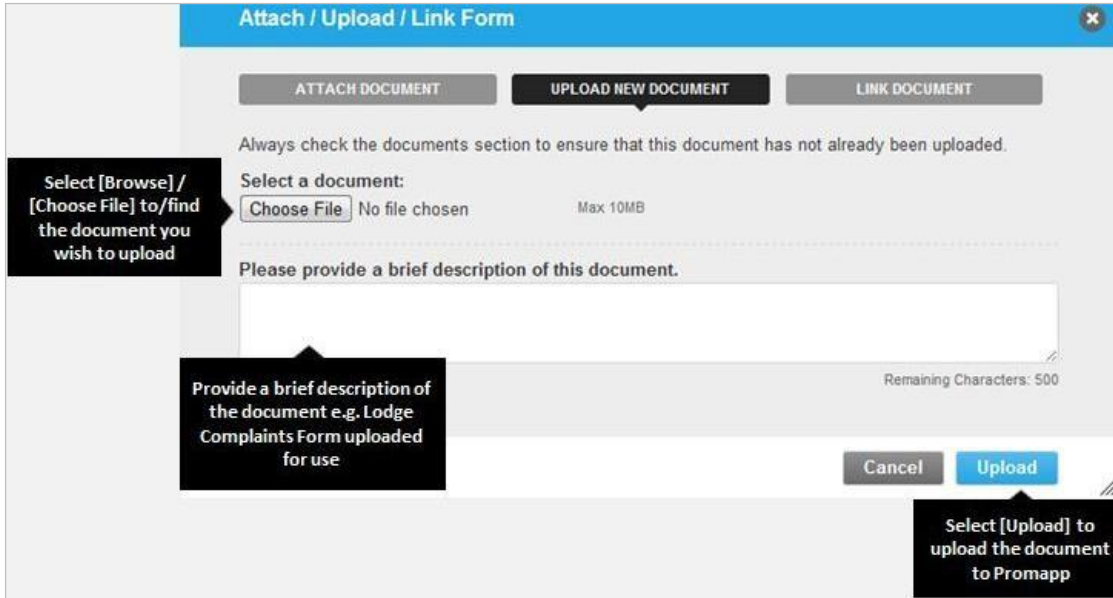b.   Select [**Send To**] and the select [**Mark Reference**]
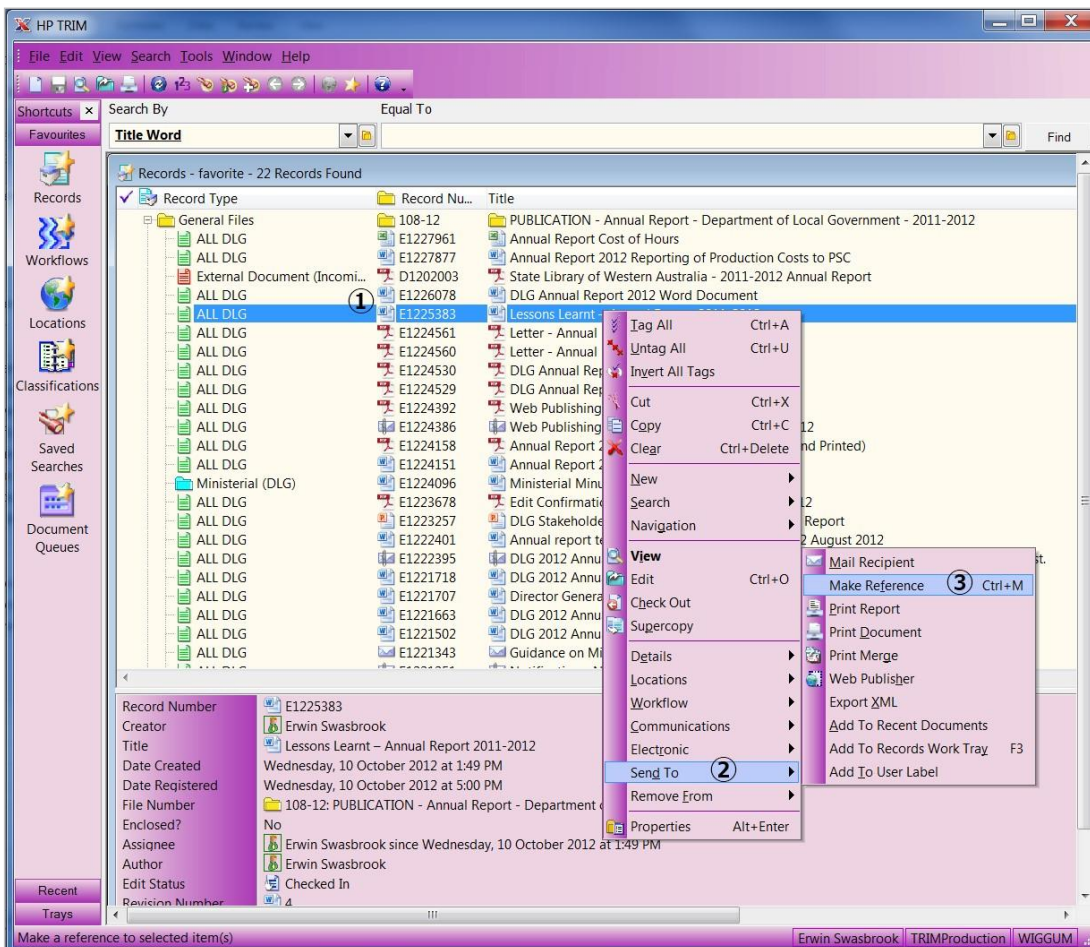
c.   [**Mark Reference**] will launch a Save Dialogue Box

d.   Save the "Reference" file (.tr5) to your desktop by renaming within the file name field if required.

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LINK TRIM DOCUMENT TO PROMAPP

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 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.