

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]

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c. Record View Pane window will appear

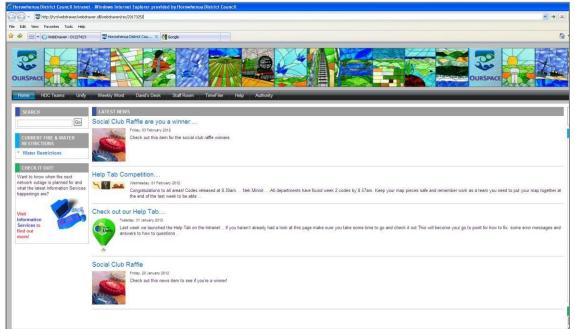
d. Scroll down on the left hand side until you find [**Context Url**], select this and click [**Add**] so that it appears in the list to the right hand side. Click [**Ok**] to save your changes and close this box.

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

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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.

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

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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

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

Upload/Link Document		
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- 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]

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- 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.

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]

	Attach / Upload / Link Form	n	8
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			Select [Upload] to upload the document to Promapp

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.