

EDRMS TRIM Tip

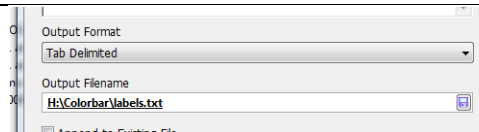
Using ColourBar 6.5 with TRIM 7.2.1

Background

TRIM 7.2.1 exports the print merge file in a format that is not compatible with ColorBar 6.5. When populating the ColorBar grid the data grid and the label are blank. The extract needs to be converted from the exported format (Windows ANSI) to MS-DOS (PC 8) format.

Note: Once ColorBar 7X is in place the conversion no longer needs to be done. This is a temporary workaround only.

Create the print merge for labels as you would do normally saving the print merge file to H:\Colorbar\labels.txt

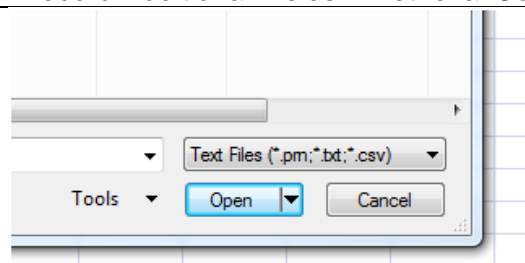


Field mapping for TRIM 7.2.1 for IAO is:

- Record Properties – Date Closed
- Record Properties – Date Created
- Record Properties – Record Number
- Record Properties – Title(Free Text Part)
- Record Properties – Title (Structured Part)
- Record Properties – Home – Location Properties - Display Name
- Record Properties – Series Record – Record Properties - Record Number
- Record Properties – Owner – Location Properties - Full Description
- Record Properties – Retention Schedule – Schedule Properties - Schedule Number
- Record Additional Fields – Content End Date
- Record Additional Fields – Content Start Date
- Record Additional Fields – Retrieval Code

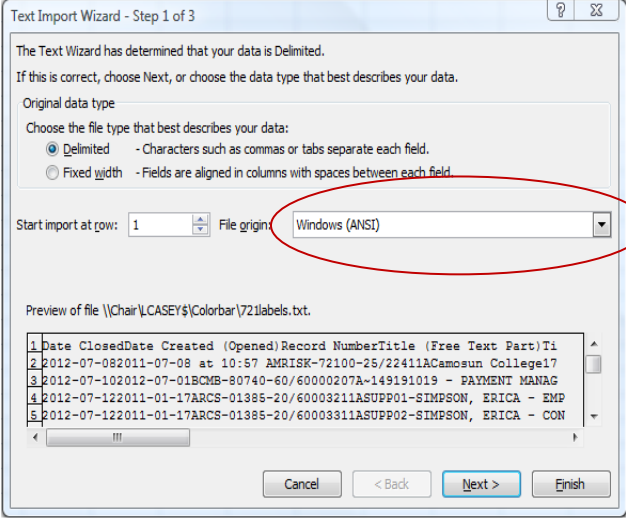
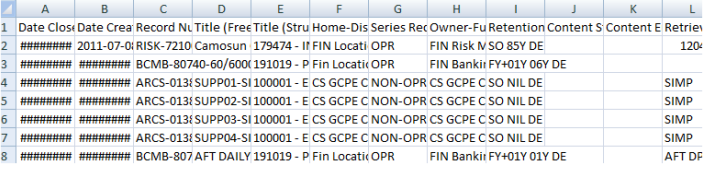
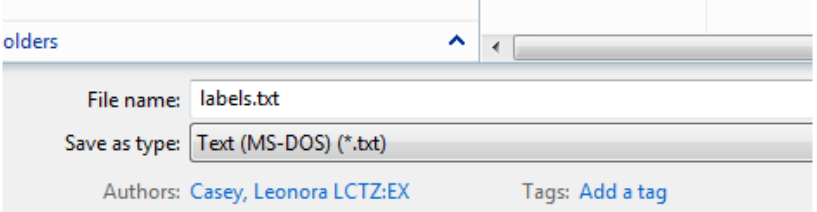
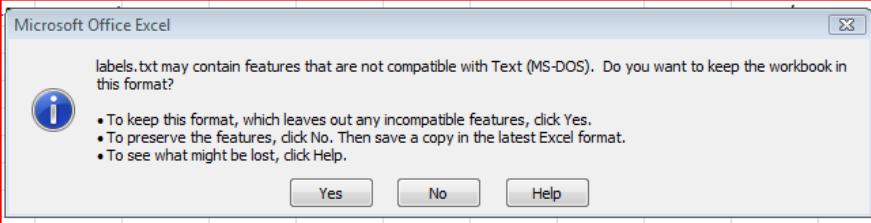
Open Excel and Open the following label file: H:\ColorBar\labels.txt

Note that you will have to change the file types searched for to Text Files



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<p>Note that the file origin for the extract reads: Windows (ANSI)</p>	
<p>Step through the import process by clicking on the next button until the data is displayed in the spreadsheet.</p> <p>Do not make any change to the data.</p>	
<p>Select Save As –Excel Workbook</p>	
<p>Change the Save As type statement to Text (MS DOS) (*.txt)</p> <p>Make sure you save it by writing over the file that you started with labels.txt</p>	
<p>Close the workbook and exit Excel without saving the workbook again.</p> <p>When you get this message click Yes.</p>	
<p>Open ColorBar and go from there. The data file that ColorBar required is now in the proper format.</p>	