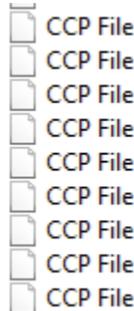
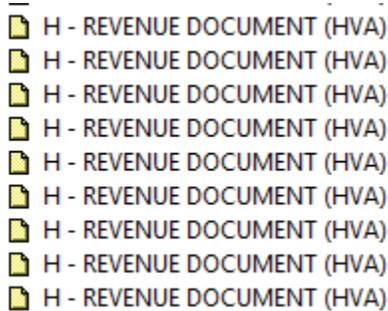


General

Accessing and retrieving a document is distinct from viewing the content of the document. All documents can be accessed and retrieved from the document repository, not all documents can be **opened and viewed** inside TRIM

TRIM stores any and all file types. File types that are common to standard business processes will be recognized by TRIM and the appropriate icon applied. File types that are not recognized by TRIM will have a generic document type icon.

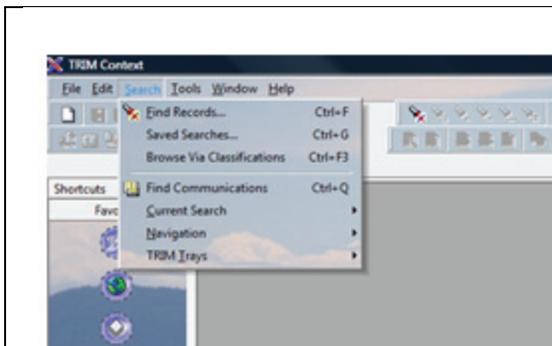
Recognized file types can be opened and viewed inside TRIM....non-recognized file types will need to be opened in their specific software after being moved outside of the TRIM environment.



This is an example of a non-recognized file extension. Note the generic icon used. These documents will need to be opened and viewed using the specific external software.

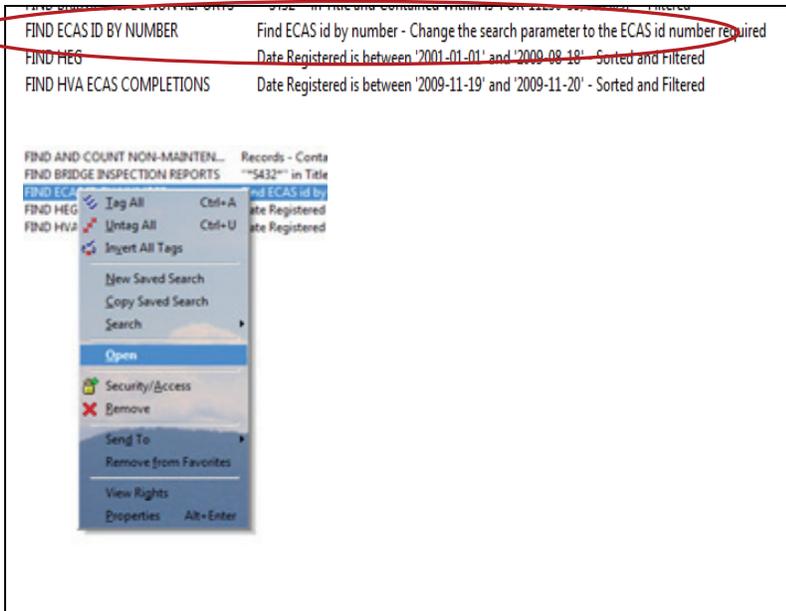
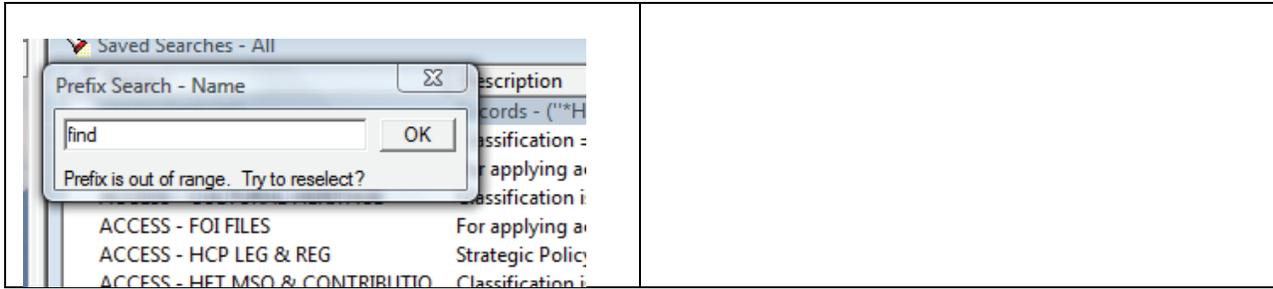
The scenario is: a licensee would contact their local district office with the classification number **FOR-19400-46** and the **ECASid #**. Given either of these two numbers the local MoF records person can pinpoint the TRIM'd attachments and email them to the requestor. **ECAS id numbers are recorded in the Notes field of the TRIM record display.**

Find ECAS attachment using the saved search – Method 1 – the short way



From the standard TRIM screen select Search -> Saved Searches

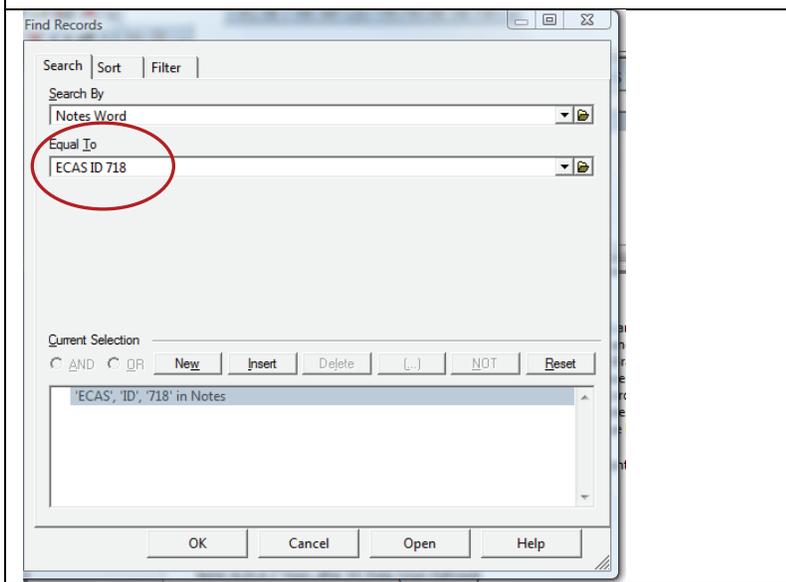
Start typing Find – a dialog box will pop up and Click OK



The search has to be run using the default parameters before you can change to the ECAS ID that you want to search on.

From the list of displayed search, highlight Find ECAS ID by number.

Right click on this search and navigate to Open. This will run the query using a default ECAS ID number.



When the default search result is displayed, use the F7 key to open the search to change the search parameter.

Change the ECAS ID number to the one that you are looking for and click OK.

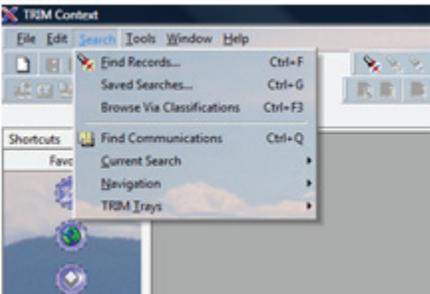
The search will run using the ECAS ID number and the results will be displayed on the screen

Search for an ECAS attachment in TRIM – Method 2 – the long way

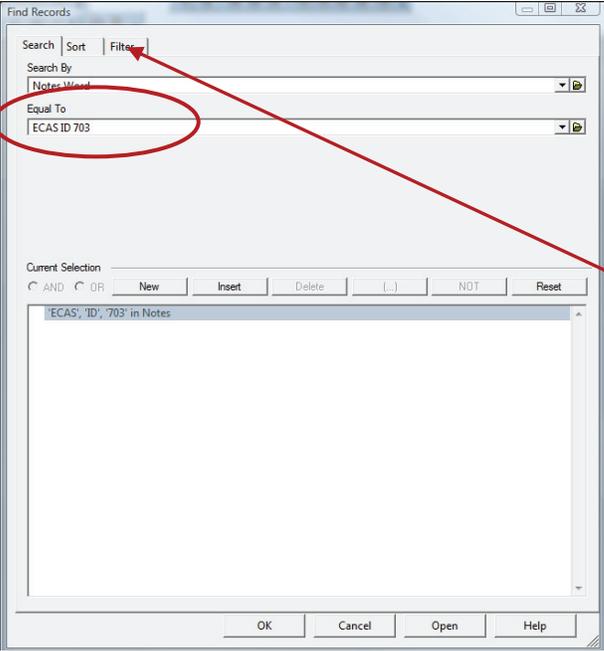
The scenario is: a licensee would contact their local district office with the classification number **FOR-19400-46** and their **ECASid #**. Given either of these two numbers the local MoF records person can pinpoint the TRIM'd attachments and email them to the requestor. **ECAS id numbers are recorded in the Notes field of the TRIM record display.**

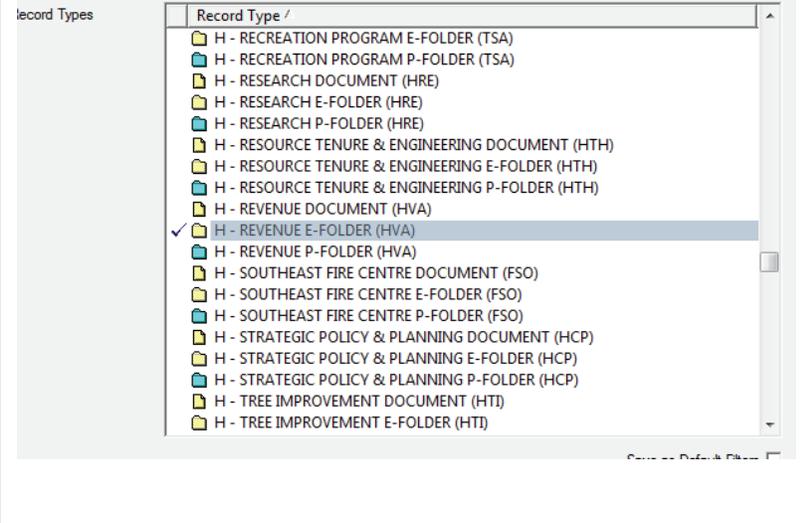
How to find, access and send and ECAS attachment to a licensee

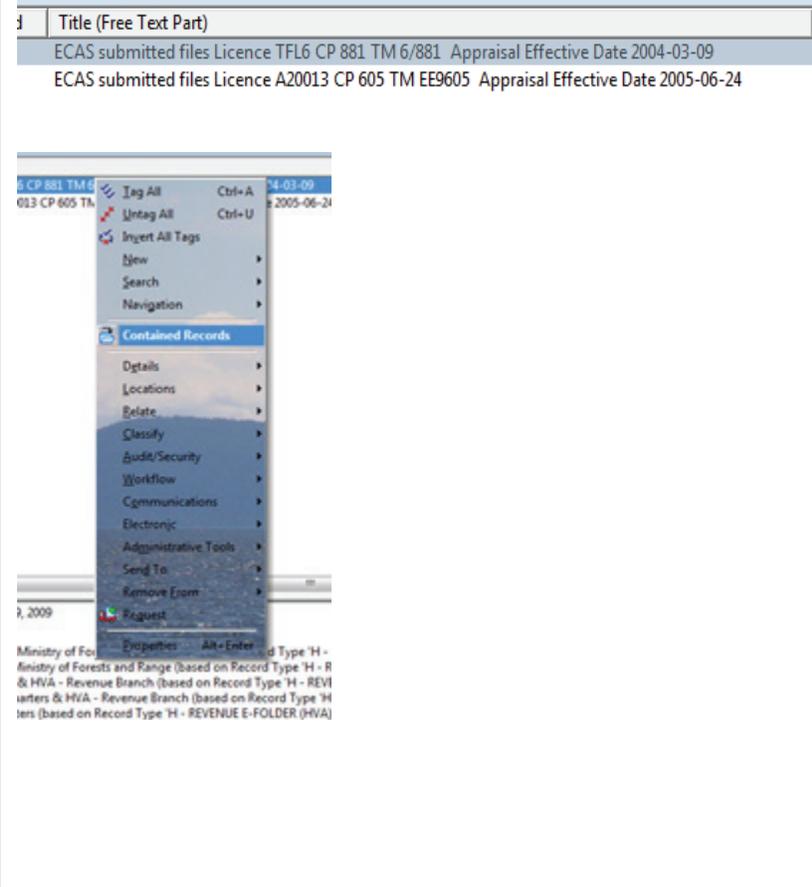
Use the standard TRIM search to find the ecas id and classification number for the record type H-Revenue Branch.

	<p>From the main TRIM screen, select Search->Find records</p>
--	--

In the Find records screen, set up the following query:

	<p>The classification number will be FOR-19400-46 for all the ECAS attachments</p> <p>Use Notes word – ECAS ID NNN where NNN is the ecas id number.</p> <p>Then click on the Filter Tab to filter the search to HVA electronic folders.</p>
---	---

	<p>In the resulting window:</p> <p>Click on the top column header to sort the record types.</p> <p>Right click and select – Untag all</p> <p>Navigate down the list until you reach H-Revenue Branch E-Folder (HVA) and tag that folder.</p> <p>Click the OK button at the bottom of the screen and the search will run.</p>
---	--

	<p>When the results are displayed on the screen, right click on the folder and select Contained records to display the documents inside the folder.</p>
--	---

s 'FOR-19400-46/13809F' - Sorted - 5 Records Found	
Title (Free Text Part)	Conter
LICCENCE_TFL6_CP_881_TM_6-881_APPEFFDATE_2004-03-09_ECASID_703_ATTACHED_2004-03-11_15-03-23_Specified Operations - Tr...	
LICCENCE_TFL6_CP_881_TM_6-881_APPEFFDATE_2004-03-09_ECASID_703_ATTACHED_2004-03-10_16-03-15_Tenure Information	
LICCENCE_TFL6_CP_881_TM_6-881_APPEFFDATE_2004-03-09_ECASID_703_ATTACHED_2004-03-10_14-03-12_Cruise - Cruise Analysis F...	
LICCENCE_TFL6_CP_881_TM_6-881_APPEFFDATE_2004-03-09_ECASID_703_ATTACHED_2004-03-09_15-03-33_Cruise - Cruise Compilati...	
LICCENCE_TFL6_CP_881_TM_6-881_APPEFFDATE_2004-03-09_ECASID_703_ATTACHED_2004-02-13_11-02-35_1076698873706	

Highlight the document requested by the licensee, right click on it and follow the instructions for either emailing it or viewing it ...

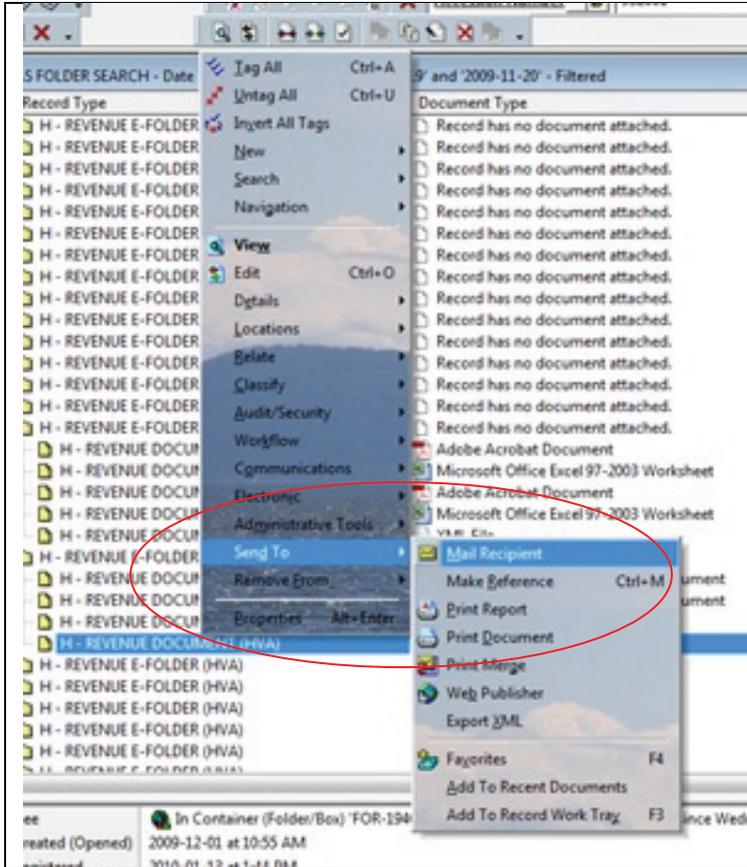
Retrieve a document from the TRIM Repository – send as email attachment

Use this method when you want to send a copy a document to a requester by email. All file types, common or unique can be sent as an email attachment.

Use one the search methods to find the document.

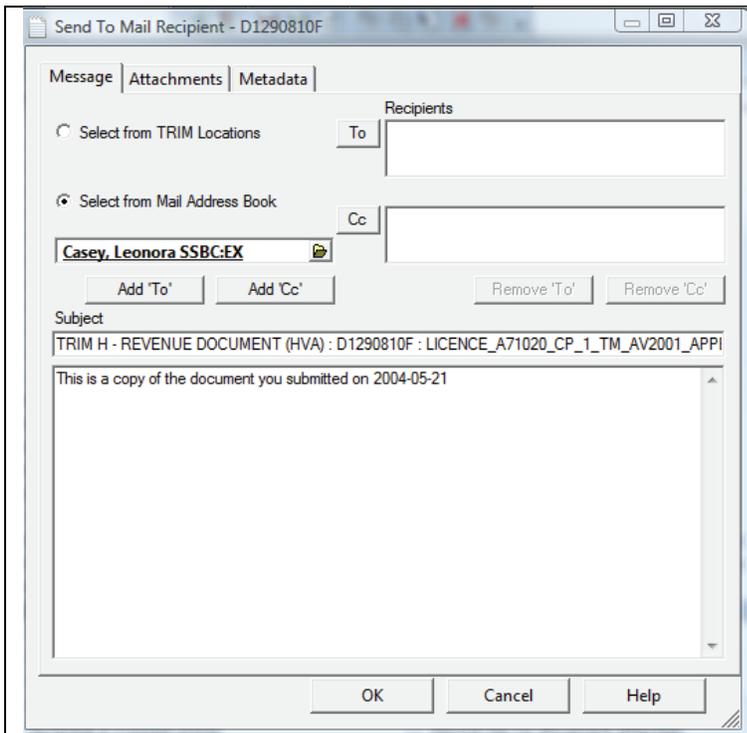
With the document list on your screen:

 H - REVENUE DOCUMENT (HVA)	 XML File
 H - REVENUE E-FOLDER (HVA)	 Record has no document attached.
 H - REVENUE DOCUMENT (HVA)	 Microsoft Office Word 97 - 2003 Document
 H - REVENUE DOCUMENT (HVA)	 Microsoft Office Word 97 - 2003 Document
 H - REVENUE DOCUMENT (HVA)	 Adobe Acrobat Document
 H - REVENUE DOCUMENT (HVA)	 XML File
 H - REVENUE E-FOLDER (HVA)	 Record has no document attached.



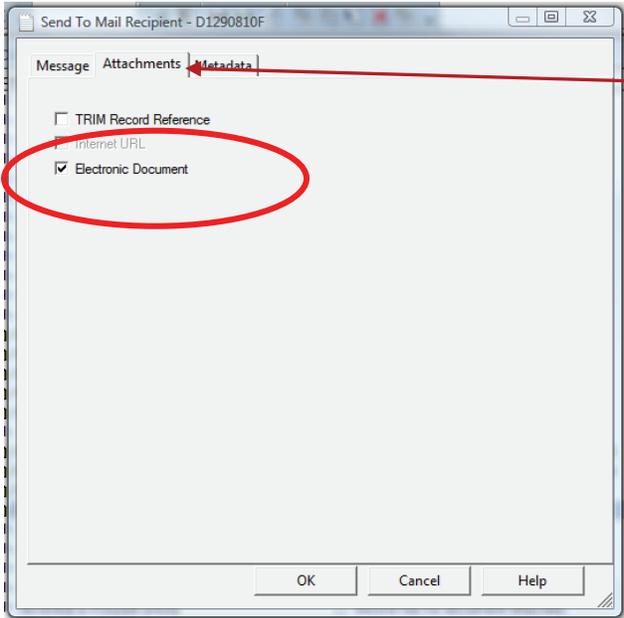
Right click on the document to be retrieved and sent to a recipient as an attachment to an email.

Navigate to the "Send to" menu item and to the Mail Recipient sub menu item



At the first screen fill in the recipient name and any message details that you want to include.

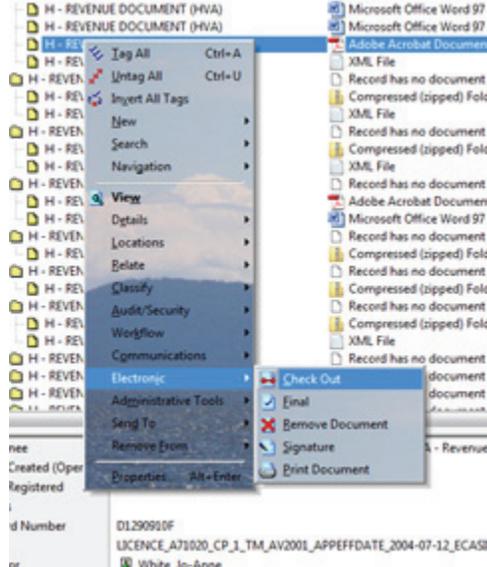
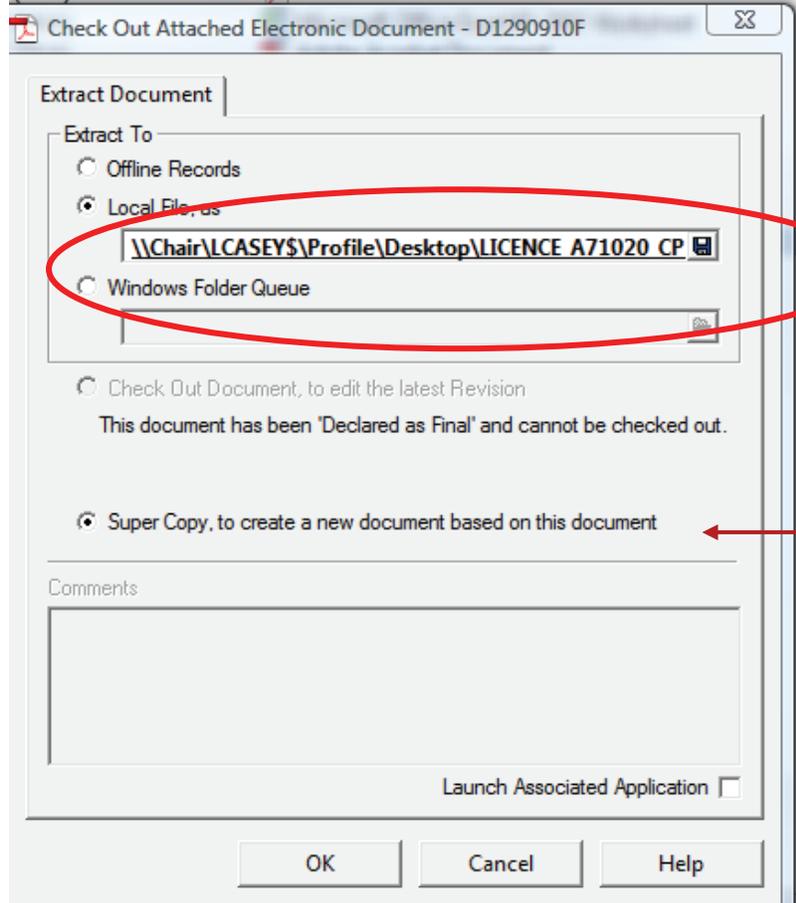
If it is to an external addressee, copy the email address from one of their incoming messages.

	<p>Then click on the tab labelled “Attachments”.</p> <p>On this screen ensure that the Electronic Document selection is ticked:</p> <p>Click OK and the email with the document attached will be sent to the recipient in the addressee line.</p> <p>Note that you can also send this to yourself and then on to a requester.</p> <p>You can also use this method to send yourself a document that has a unique file type in order to open and view it.</p>
---	---

Send a TRIMed document to a shared drive, or desktop to open view to contents or email to document as an attachment

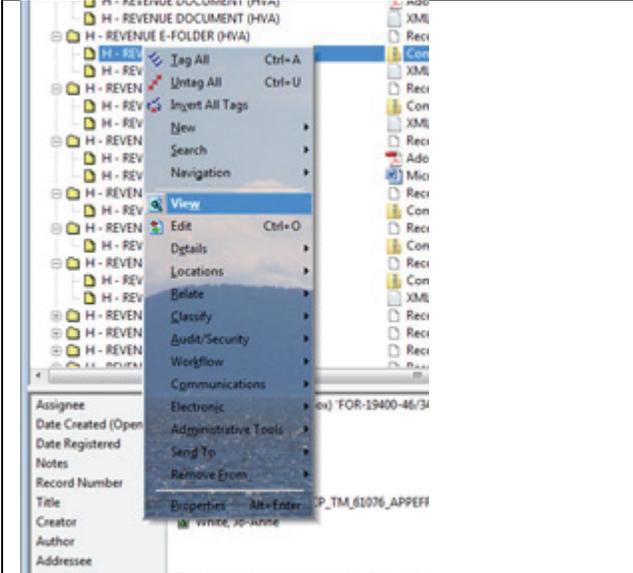
Use this method when the file type is not recognized by TRIM and you need to open and view the document contents and do not want to go through the email. This method can also be used to park the document on a shared drive and then attach it to an email.

You cannot drag and drop a document from TRIM into a desktop or shared drive. In order to directly save a document to a drive, the document management functionality of TRIM is utilized. This function “Checks out” a document from the document repository. When dealing with the ECAS attachments, we do not want to have the original document edited. The documents have been set as finalized in order to prevent revision. The finalized documents need to “Checked out” as a copy.

 <p>A screenshot of a file explorer window showing a context menu for a document. The 'Electronic' menu item is selected, and its sub-menu is open, with 'Check Out' highlighted. Other options in the sub-menu include 'Final', 'Remove Document', 'Signature', and 'Print Document'. The background shows a list of files and folders, including 'Microsoft Office Word 97...', 'Adobe Acrobat Document', and 'XML File'.</p>	<p>To “check out” a finalized document, right click on the document and select the “Electronic”, Check out menu item.</p>
 <p>A screenshot of the 'Check Out Attached Electronic Document - D1290910F' dialog box. The 'Extract Document' section has 'Local File, as' selected. The path '\\Chair\LCASEYS\Profile\Desktop\LICENCE A71020 CP' is entered in the text box below. The 'Super Copy, to create a new document based on this document' option is selected. A red oval highlights the path text box. A red arrow points from the text 'Click OK' to the 'OK' button. The dialog also includes a 'Comments' text area and a 'Launch Associated Application' checkbox.</p>	<p>Save the document to a local drive, by navigating to the drive required.</p> <p>Note that the document will be checked out as a copy. The original will continue to reside in the document repository and cannot be changed.</p> <p>Click OK</p>

Open (View) a document while in TRIM

NOTE: This can only be done inside TRIM when the document type is recognized by TRIM. Recognized document types will have an appropriate icon beside the file type.

 A screenshot of the TRIM software interface. On the left, there is a tree view of folders and documents. A document is selected, and a context menu is open over it. The menu items include 'Tag All', 'Untag All', 'Insert All Tags', 'New', 'Search', 'Navigation', 'View', 'Edit', 'Details', 'Locations', 'Relate', 'Classify', 'Audit/Security', 'Workflow', 'Communications', 'Electronic', 'Administrative Tools', 'Send To', 'Remove From', and 'Properties'. The 'View' option is highlighted in blue. Below the tree view, there is a metadata pane with fields like 'Assignee', 'Date Created', 'Date Registered', 'Notes', 'Record Number', 'Title', 'Creator', 'Author', and 'Addresssee'. <p>To view a document inside TRIM, right click on the document and select "View" from the drop down menu.</p> <p>The document will launch in its appropriate application.</p>	
---	--