

8 TROUBLESHOOTING

8.1 LEFT HAND MENU

The left hand list pane displays a selection of your search results. Do not be alarmed if this does not refresh at the same speed as the right hand view. Some features in the left hand pane will only refresh after you have closed the application.

8.2 F5 REFRESH

If you are refreshing in order to see “Checked Out” update and it is causing the “Find Records” to pop up, instead wait til later in the session and check under “My Checked Out Documents” instead. If they are still “Checked Out” ensure that all documents are closed and use the Profile Screen (double click) or Right Click > Advanced > Check In.

8.3 FIND RECORDS DIALOGUE BOX POPPING UP

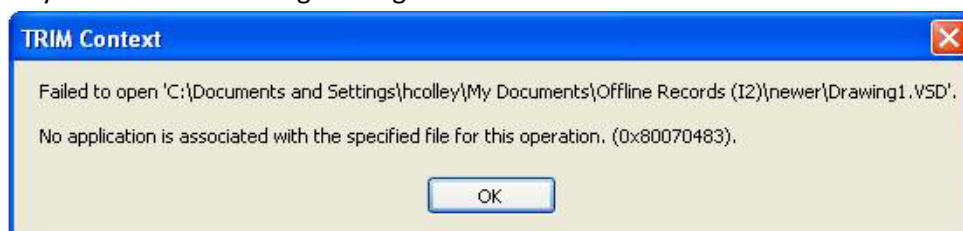
This happens occasionally on an F5 refresh particularly in the Shared/Saved Searches functions. Records Management Services aim to improve this functionality on the next release. Try clicking out of the folder and then back into it again rather than using the F5 button to refresh the screen. This should update the view.

8.4 CANNOT EDIT A DOCUMENT

Is it finalised? If yes, it cannot be edited. You should create a New Version and make changes to that.

8.5 DOCUMENT WILL NOT OPEN WHEN I CLICK EDIT

You can only open a document for edit if you have the application installed on your PC. e.g. if you wish to open a CAD document you must have the compatible software installed on your computer or else you can only see a Read-Only version in the **TRIM Document Viewer**. You may receive the following message:



It may also try to launch Internet Explorer, to direct you to the software.