

All records, including emails, created or maintained by employees or contractors in the course of their duties on behalf of the Corporation are property of the NWT Power Corporation and are subject to records management.

To achieve Records Management at NTPC we use **iManage**.

FIND A WORKSPACE

Outlook	Word, Excel, PowerPoint
<ol style="list-style-type: none"> Click the button. Click the Clear button. Select Search Within -> All Databases. Enter search criteria or use the button to select from a list. Click the Search button. Click on the desired Workspace and select from one of the following options: 	<ol style="list-style-type: none"> Select File -> Open. Click on the Search button and select Advanced Workspace Search. Click the Clear button. Select Search Within -> All Databases. Enter search criteria or use the button to select from a list. Click the Search button.
<p>To add a Workspace from your Recent Workspaces to your My Workspaces, right-click on the Workspace and select Add to My Matters.</p>	

FIND A DOCUMENT

Outlook	Word, Excel
<ol style="list-style-type: none"> Click the button. Click the Clear button. Select Search Within -> All Databases or browse to search within a specific workspace or folder. Enter search criteria or use the button to select from a list. Click the OK button. Double click on the desired document to open it or view it using the View tab in the Document Results Frame. 	<ol style="list-style-type: none"> Select File -> Open. Click on the Search button and select Advanced Document Search. Enter search criteria or use the button to select from a list. Click on the OK button. Double click on the desired document to open it.
<p>A shortcut can be created to the document by right-clicking on the document and selecting Add to My Favorites at any time.</p>	

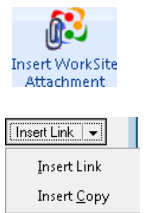
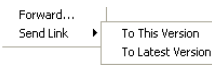
OUTLOOK WORKSITE EMAIL MANAGEMENT TOOLBAR
SAVE A DOCUMENT

Save As (Overwrite Original or New Version)	Saving New Documents
<ol style="list-style-type: none"> Select File -> Save As. Select Replace Original (overwrite original) or New Version. Click OK. 	<ol style="list-style-type: none"> Select File -> Save. Use the shortcuts along the left or search for a workspace (see FIND A WORKSPACE). Browse to the desired folder. Enter the file description (as detailed as possible) and author information. Click the Save button.
Import a Document (single document)	Drag and drop (multiple documents)
<ol style="list-style-type: none"> Right click on a folder. Click on Add Document. Browse for the document. Click Open. Use the shortcuts along the left or search for a workspace (see FIND A WORKSPACE). Enter the file description (as detailed as possible) and author information. Click the Save button. 	<ol style="list-style-type: none"> Select the destination folder in iManage. Arrange iManage and the source file location so you can see both on the screen. Select the document(s) and drag them into the document grid in iManage. <p><i>Documents will inherit profile information from the destination folder.</i></p>

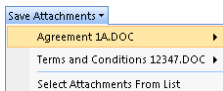
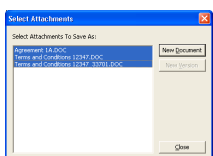
SEARCH TIPS

- Only workspaces/documents that you have access to will appear in your search.
- Searching with multiple criteria can narrow down your search results.
- If you don't get the results you are expecting, you may have made your search too restrictive. Start general and then make it more restrictive by adding more criteria.
- It is a good practice to always click the **Clear** button before starting a new search.



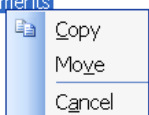
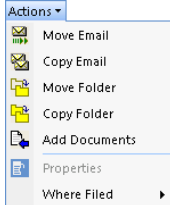
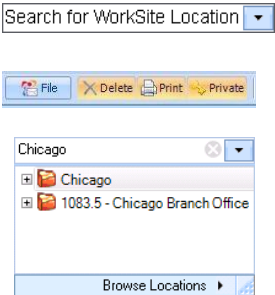
ADD AN IMANAGE DOCUMENT TO AN EMAIL

Outlook	
<ol style="list-style-type: none"> Method 1 – EMAIL FIRST <ol style="list-style-type: none"> Open a blank email. Click on the Insert WorkSite Attachment. Locate document(s) (see FIND A DOCUMENT). Select the document and use the down arrow to select Insert Copy or Insert Link <p>OR</p> <p>Right click and select Insert Link or Insert Copy.</p> Method 2 – DOCUMENT FIRST <ol style="list-style-type: none"> Locate The document(s) (see FIND A DOCUMENT). Right click the document and select Forward or Send Link. 	 
<ul style="list-style-type: none"> Forward is normally used when sending an attachment(s) to external parties. Send Link is used when sending an attachment(s) to internal parties. This ensures duplication is minimized within the company and that the appropriate security remains intact. 	

IMANAGE EMAIL ATTACHMENTS

Outlook	
<ol style="list-style-type: none"> Method 1 – DRAG & DROP TO MULTIPLE FOLDERS <ol style="list-style-type: none"> Locate the destination Workspace and folder. Open or preview the email containing the attachment(s). Click on the attachment(s) and drag and drop to the folder. Method 2 – MULTIPLE ATTACHMENTS TO ONE DOCUMENT FOLDER <ol style="list-style-type: none"> Highlight one or more email(s) with attachments. Click Save Attachments from the Email Management toolbar. Click on individual attachments or All Attachments. Click the New Document button. Use the shortcuts along the left or search for a workspace (see FIND A WORKSPACE). Enter the file description (as detailed as possible) and author information. Click Save. 	 

FILE AN EMAIL

Outlook	
<ol style="list-style-type: none"> Method 1 – DRAG & DROP <ol style="list-style-type: none"> Locate the workspace in FileSite. Highlight the email(s) in Outlook. Right click drag and drop. Select Copy (retain a copy on Outlook), Move (removes email from Outlook) or Cancel. Method 2 – EMAIL BUTTONS <ol style="list-style-type: none"> Select the email(s) in Outlook for filing. Click on the Actions button from the Email Management toolbar. Select the Move Email or Copy Email button. Use the shortcuts along the left or search for a workspace (see FIND A WORKSPACE). Method 3 – AUTOMATIC SUGGESTION <ol style="list-style-type: none"> Highlight the email in Outlook for filing. Refer to the Suggested File Location/Search field in the Email Management toolbar. If the suggested file location is correct, click on the  button. <p>OR</p> <p>Click the down arrow beside the Search field to view other recently filed locations or click Browse Location to search for a Workspace and folder. Click the  button.</p> 	  
<ul style="list-style-type: none"> Emails filed utilizing Method 3 can also be deleted, printed, or marked as private at the time of filing. Click on one or more of these buttons before clicking the File button to include the action. The appropriate dialog windows will be activated. 	

LINK OUTLOOK FOLDER TO IMANAGE FOLDER

Outlook	
<ol style="list-style-type: none"> Right click on an Outlook folder and select Properties -> File to Worksite. Choose File Items in this folder to Worksite. Browse to select a Filing Location in iManage. Uncheck Leave messages in Outlook after filing if you wish to have the emails delete from Outlook automatically. Click the OK button. 	