

## Save Outlook Email to Corporate Records (TRIM)

### Description

When Microsoft Outlook is integrated with Corporate Records/TRIM, you can automate saving Outlook email to TRIM through the 'Check In Style' feature.

**Note:** Corporate Records (TRIM) is also known as **HPE Content Manager**, so the two terms are used interchangeably and mean the same thing.

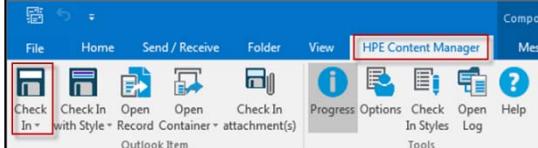
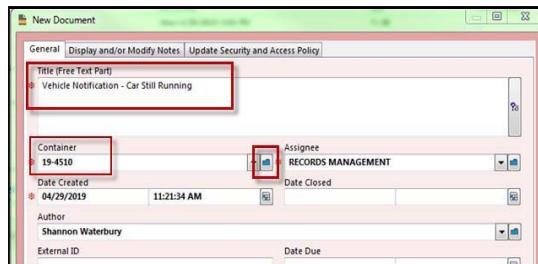
**Important:** This feature only works with the Outlook Client program. Saving email to TRIM is not available from Outlook Web. The HPE Content Manager Add-in for Microsoft Outlook must also be installed.

### Instructions

This document will cover:

- Quick Start: Saving individual email messages to Corporate Records/TRIM
- Setup Linked Outlook folders to Corporate Records/TRIM for automated email saving

### Quick Start: Saving Individual Outlook email Messages to Corporate Records/TRIM

Step	Action
1	<ol style="list-style-type: none"> <li>Open Outlook</li> <li>Select the email you would like to save to TRIM from the Inbox Sent Mail or other folder.</li> <li>Select <b>HPE Content Manager &gt; Check In</b> from menu on the Outlook ribbon</li> <li>The New Document box will open</li> <li>Change the title of the email as needed in the <b>Title</b> box</li> <li>In the Container field, type the TRIM Record Number of the folder where you want to save the email</li> <li>If the TRIM Record Number is unknown, click the <b>blue file folder</b> to search for the folder</li> <li>Select the folder so it displays in the Container field, select <b>OK</b></li> <li>Once saved, the Outlook email will have the word TRIM in the Subject line</li> <li>The email may be deleted or moved to a folder</li> </ol>   <p><b>Note:</b> The Container field is a Required Field</p>

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**Description** Setup linked Outlook folders to Corporate Records/TRIM Folders for automated email saving.

**Guidelines** If you migrated from Lotus Notes, your email folders that were linked to TRIM from Lotus Notes will need to be re-linked through Microsoft Outlook.

Before you begin, make a list or take a screen print of your Outlook folders that you want linked to TRIM. Look up the Record Number for the TRIM folder where you will be saving those emails, and note the record number down next to the corresponding Outlook folder.

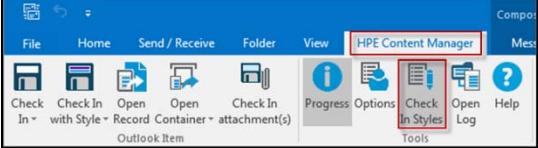
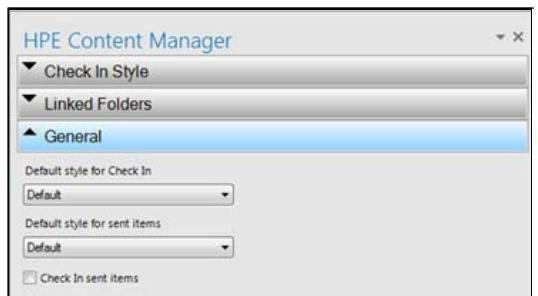
Check In Style planning worksheet (optional) with examples:

Outlook Folder Name	TRIM Folder Name, Record Number	Check In Style Name
Project Gemini	PMO - 2019 - Project Gemini 19-4510	Project Gemini

**Creating your Check In Style(s).** For each folder in TRIM that you are going to save email to, you need to create a Check In Style. You can apply a Check In Style to an entire Outlook folder or to an individual email. Use the worksheet above.

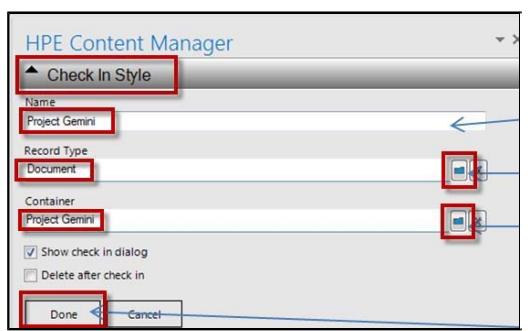
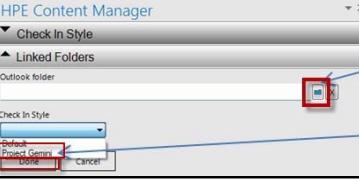
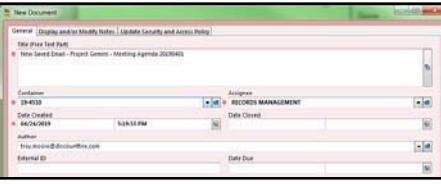
**Setup your Linked Folders.** Each of your Linked Folders within Outlook will need to use one of the Check In Styles that you created in step 1.

## Getting Started

Step	Action
1	<p>a. Open Outlook</p> <p>b. Select <b>HPE Content Manager &gt; Check In Styles</b> from menu on top ribbon</p> <p>c. HPE Content Manager (TRIM Manager) will open</p>  

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Creating Check In Style	Step	Action
	<ol style="list-style-type: none"> <li>a. Select <b>Check In Style</b> to open dialog box to set up a new check in style (<i>The check-in style example shown uses the example shown in the planning worksheet</i>)</li> <li>b. Type <b>Name</b> of the Check In Style</li> <li>c. Select <b>blue folder next to Record Type</b> and select <b>Document</b></li> <li>d. Select <b>blue folder next to Container</b> use Search to locate TRIM Record number (folder) where the emails are going to be saved</li> <li>e. Select <b>Done</b></li> <li>f. Once created, Check In Styles will be displayed under the Check In Style ribbon</li> </ol> <p><b>Note:</b> Repeat this process for as many Check In Styles that need to be set up.</p>	 
Setup Linked Folders	<ol style="list-style-type: none"> <li>a. Select <b>Linked Folders</b></li> <li>b. Select the <b>plus sign</b> to add new linked Outlook Folder To TRIM</li> <li>c. Click <b>blue folder</b> to select from a list of your Outlook Folders</li> <li>d. Select the Check In Style for this folder that you created in Step One</li> <li>e. Select <b>Done</b></li> <li>f. The linked folder window will display the list of Outlook email folders that are linked to TRIM.</li> <li>g. Now an email may be drag/dropped from your Inbox into the folder that was just linked</li> <li>h. A New Document window will pop up when an email is added where additional information may be added.</li> </ol> <p><b>Note:</b> If you prefer the New Document email to not pop up uncheck the Show Check in Dialog from Step two.</p>	  

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### Notes About Linked Folders

- Dragging items in Outlook - checking in is not supported for more than one item. Instead of dragging, you should set up an Inbox rule to forward email automatically to the managed folder.
  - For example, if you drag a large number of items into a managed folder, they may not all be processed into HPE Content Manager and no error messages appear. The items will however be placed in the selected folder. .
  - It is recommended you use the Clear Backlog function from the HPE Content Manager in Outlook HPE Content Manager Menu if the above occurs, select Clear Backlogs. This will process any unprocessed items in the selected folder.
- You can set up your email system to automatically forward certain received email to your linked folder. See your email system's help file for further information.
- A linked folder cannot be setup from any of the following Outlook folders: Sent Items, Transition, or Drafts.
- To cancel items dropped into a linked folder, click the cancel button to stop the creation of item in HPE Content Manager. The items are still moved to appropriate folder in Outlook, however, the user will need to use Clear Backlog to reprocess the items.

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### Contact

For help, please contact [support@discounttire.com](mailto:support@discounttire.com).

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