



**TRIM9**  
Content Manager

# Tips & Tricks

## Attaching TRIM Record to Email Messages

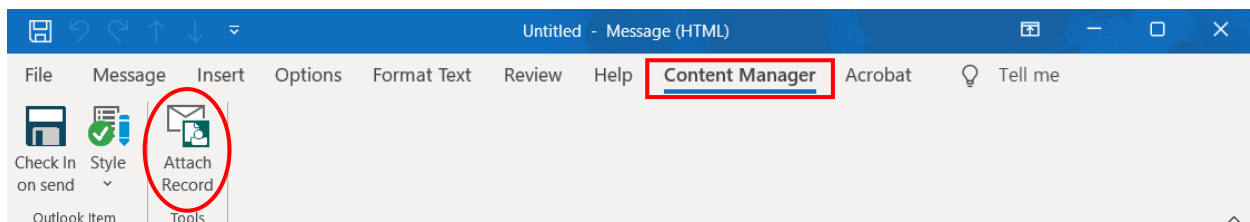
Did you know it was possible to attach TRIM records or TRIM record metadata to Outlook email messages?

This can be achieved by either “Attaching Records” while composing an email in Outlook or the “Send To” function directly from TRIM.

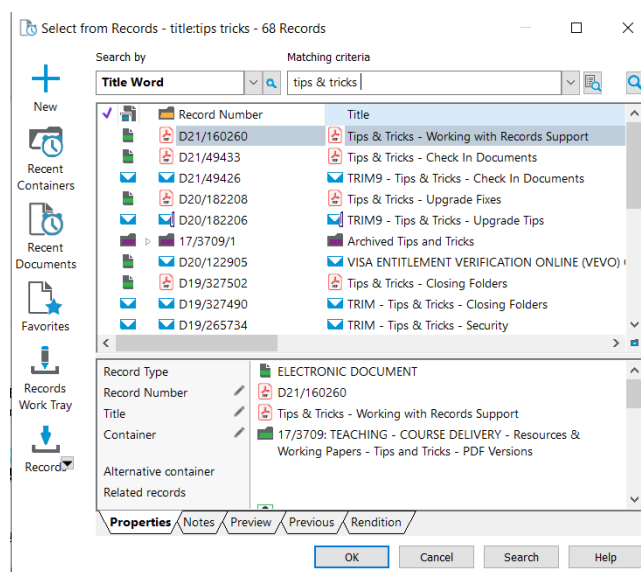
## Attaching Records

When composing and sending an email from Outlook, TRIM enables you to attach TRIM record details, registered electronic documents and references. On the email you are composing:

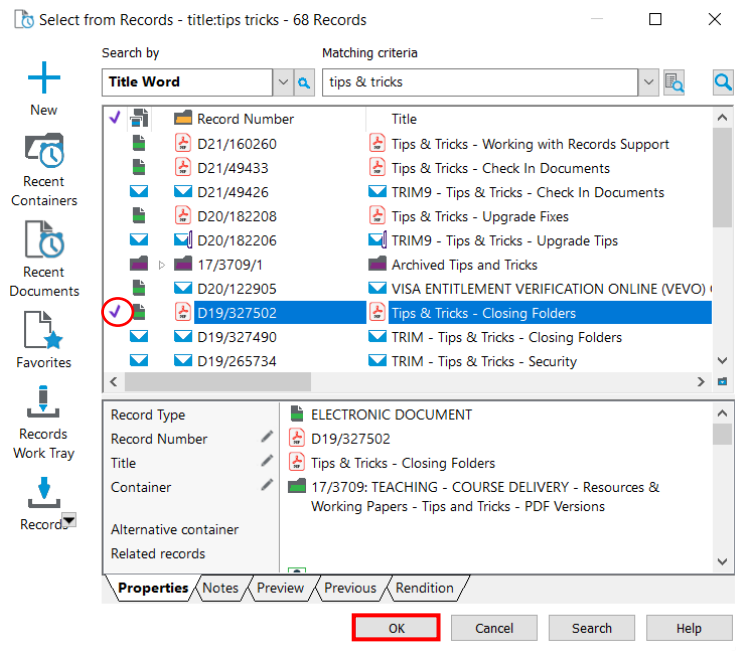
- Click the **Content Manager** tab → Select **Attach Record** (This will open a ‘searching dialogue box in TRIM)



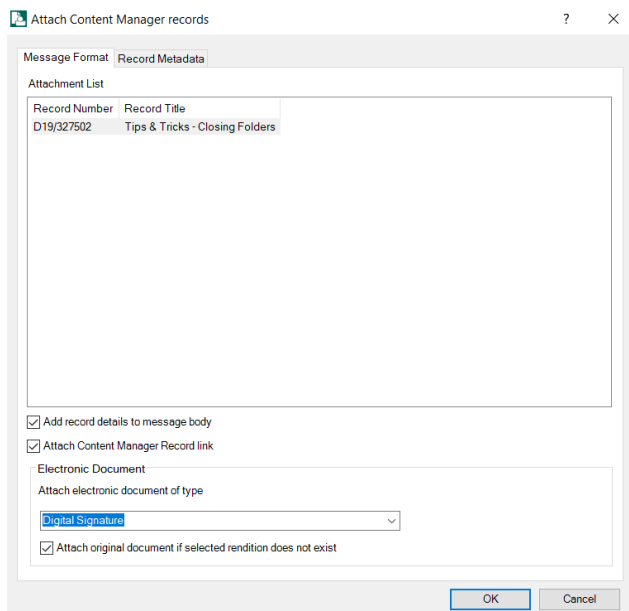
- Use the Searching dialogue box to locate the record to attach to the email message



- Select the required record by placing a **tick** to the left side of the record → Click **OK**



- Select *how* the record will attach to the email by placing a tick in the required tick boxes:



### **Add record details to message body**

*Adds the record details to the email message body rather than as an attachment.*

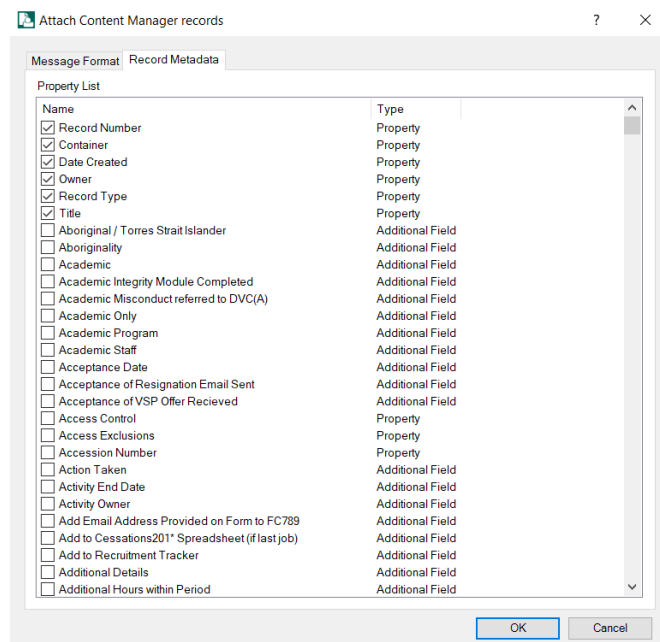
### **Attach Content Manager Record link**

*Attaches a TRIM reference file for the selected record to the email. This allows the recipient to follow the link to the record in TRIM.*

### **Attach original document if selected rendition does not exist**

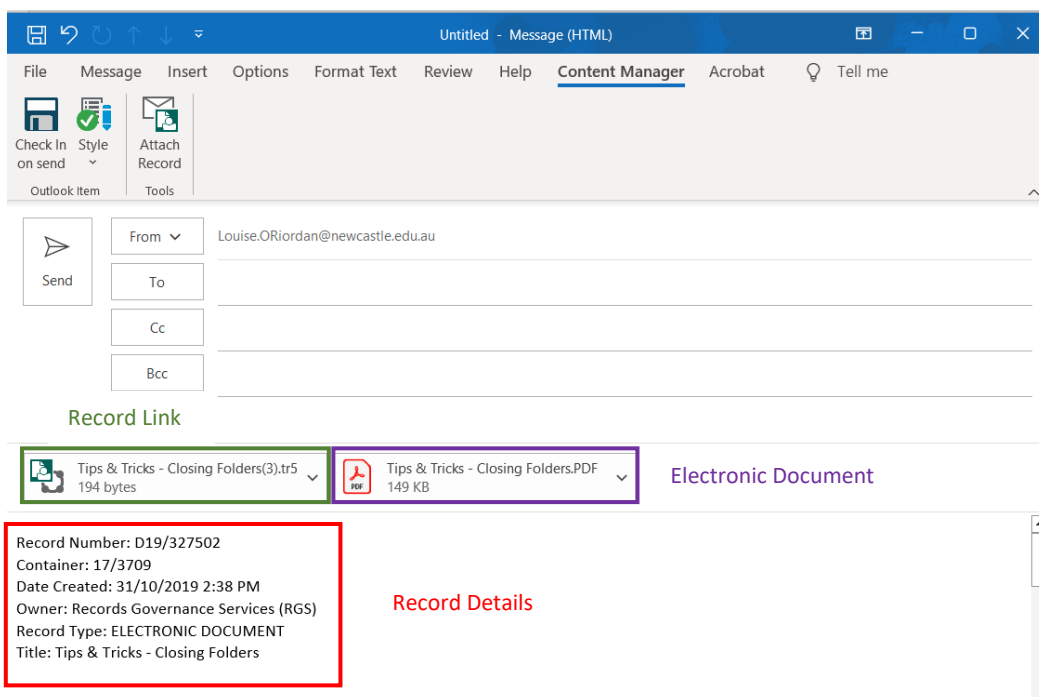
*Attaches the electronic document in its native format to the email. This is useful if the recipient does not have access to TRIM.*

- If it is the first time attaching a record to an email, you will need to select the Record Metadata options that you would like to be added to the message body. Search for any items you would like to add, these are listed in alphabetic order. The main ones you might like to use are **Record Number**, **Container**, **Date Created**, **Owner**, **Record Type** and **Title**.



***Note:** Once you have selected the required fields these selections will save and be added for each new email you create with an attached record from TRIM.*

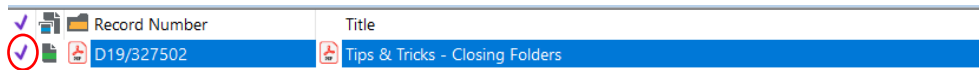
- Click **OK** to attach to your email
- The various options will display as below (**Note:** It is not necessary to always choose all 3 options, only select the most appropriate option/s for the email)



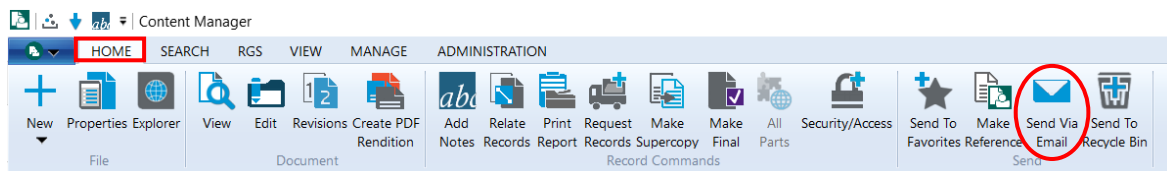
# Send To

The 'Send To' function allows you to create the email directly from TRIM; rather than Outlook (as described above). Start this method in TRIM *after* you have located the record/s you wish to send via email.

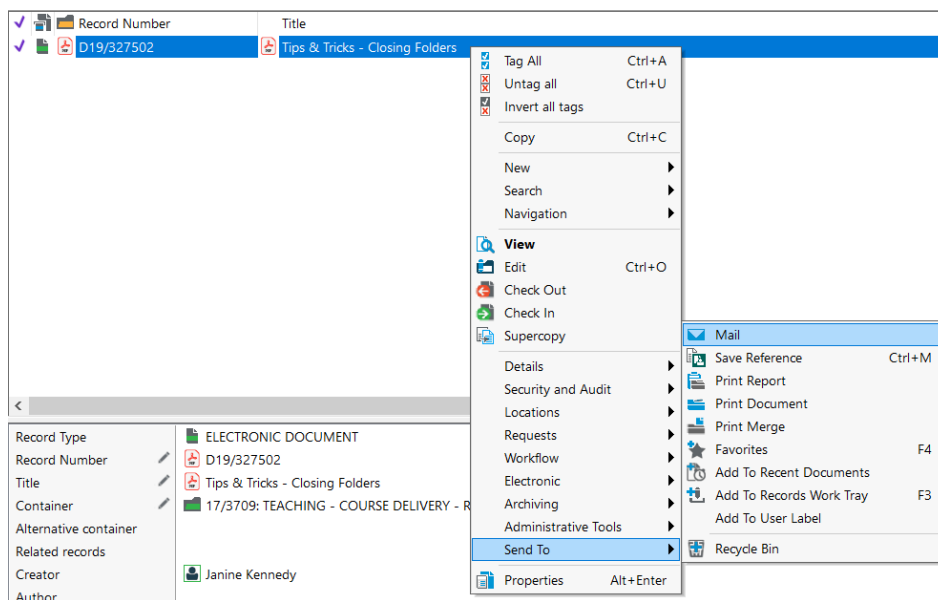
- Place a tick(s) next to the record(s) you want to send via email



- Once selected either:
  - Click the **HOME** tab and click **Send Via Email**; or



- Right Click on the record → **Send To** → Select **Mail**



- Use the tick boxes to select the most appropriate format for sending these records via email

Send To Mail Recipient - D19/327502

Format Metadata

☒ Content Manager record reference

☐ Internet URL

☒ Include Content Manager indicator and record number in email subject

☒ Electronic document

New attachment name (Optional)

OK Cancel Help

### Content Manager record reference

Attaches a TRIM reference file for the selected record to the email. This allows the recipient to follow the link to the record in TRIM.

### Include Content Manager indicator and record number in email subject

This will insert the TRIM Record Number into the subject line of the email.

### Electronic Document

Attaches the electronic document in its native format to the email. This is useful if the recipient does not have access to TRIM.

- Outlook will now open its 'new email message' screen with the records attached. Continue to create and send the email as per normal from Outlook.

Content Manager ELECTRONIC DOCUMENT : D19/327502 : Tips & Tricks - Closing Folders - Message (Plain Text)

File Message Insert Options Format Text Review Help Content Manager Acrobat Tell me

Send and Insert from File SharePoint Paste Basic Text Names Include Tags Dictate Sensitivity Editor Immersive Reader Viva Insights View Templates

From Louise.ORiordan@newcastle.edu.au

To

Cc

Bcc

Subject Content Manager ELECTRONIC DOCUMENT : D19/327502 : Tips & Tricks - Closing Folders

Tips & Tricks - Closing Folders.PDF 154 KB

Tips & Tricks - Closing Folders.tr5 6 KB

-----< Content Manager Record Information >-----

Record Number: D19/327502

Title: Tips & Tricks - Closing Folders

Record Type: ELECTRONIC DOCUMENT

Container: 17/3709: TEACHING - COURSE DELIVERY - Resources & Working Papers - Tips and Tricks - PDF Versions

Date Created: Thursday, 31 October 2019 at 2:38 PM

Owner: Records Governance Services (RGS)