

ATTACHING TRIM RECORDS TO EMAILS

Did you know it's possible to attach TRIM records or TRIM record metadata to an Outlook email?

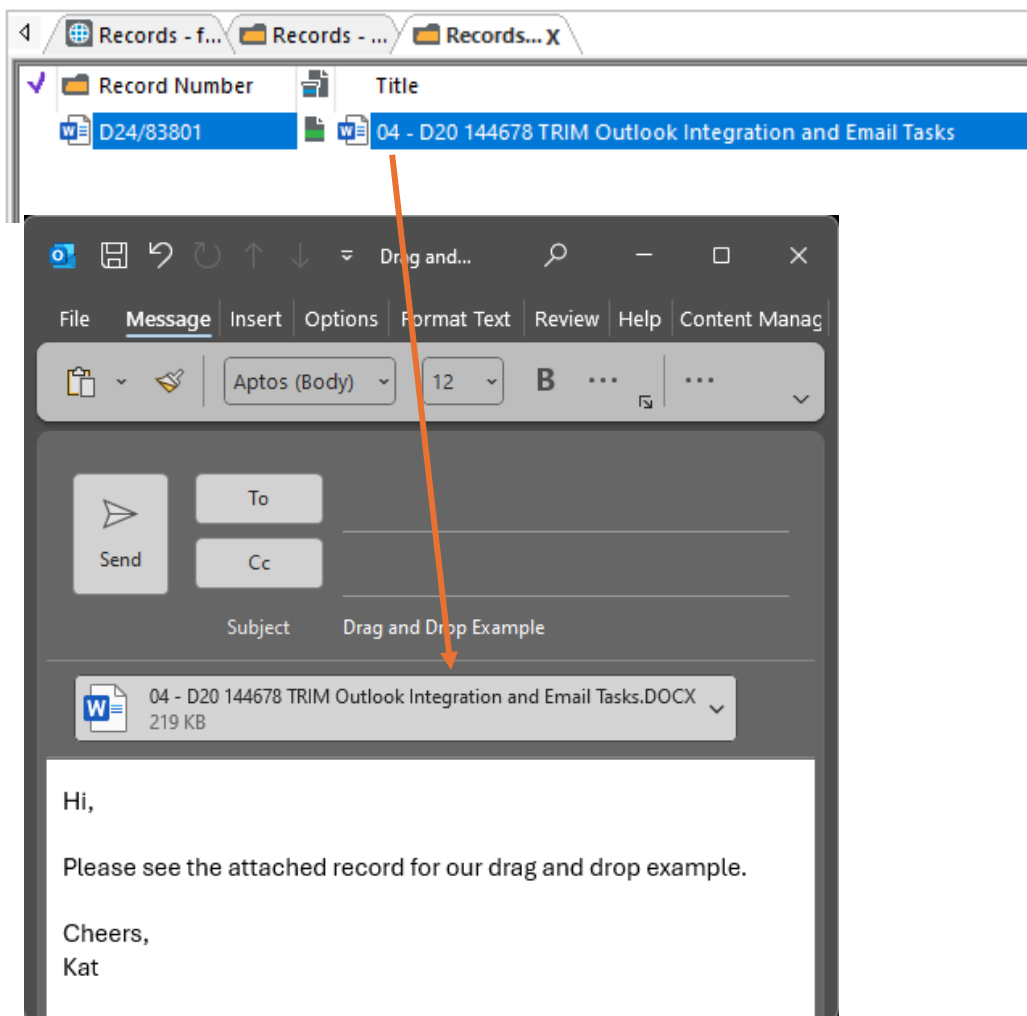
This can be achieved by either dragging and dropping documents from TRIM to a newly composed email or "Attaching Records" while composing an email in Outlook.

ATTACHING RECORDS

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

Drag and Drop

1. From Outlook, compose your email.
2. Locate the Record in TRIM that you want to attach to your email.
3. Drag and drop the record over to your newly composed email:

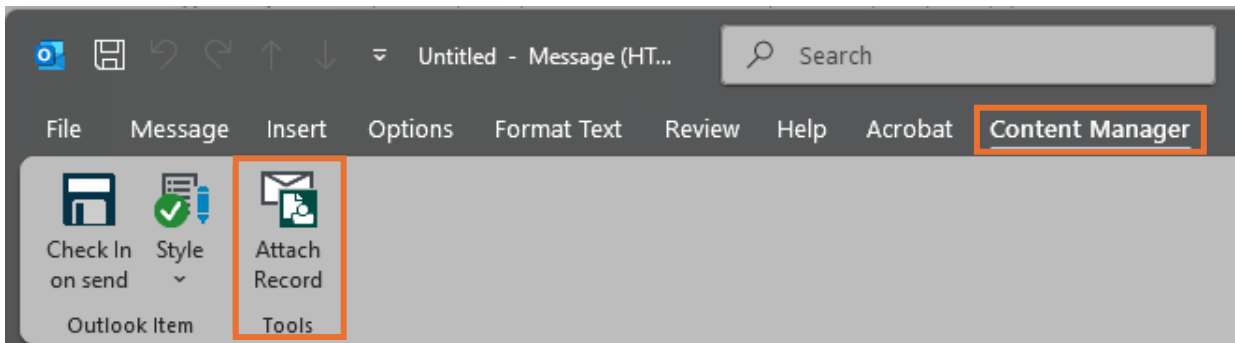


4. The record should now appear as an attachment in your email.

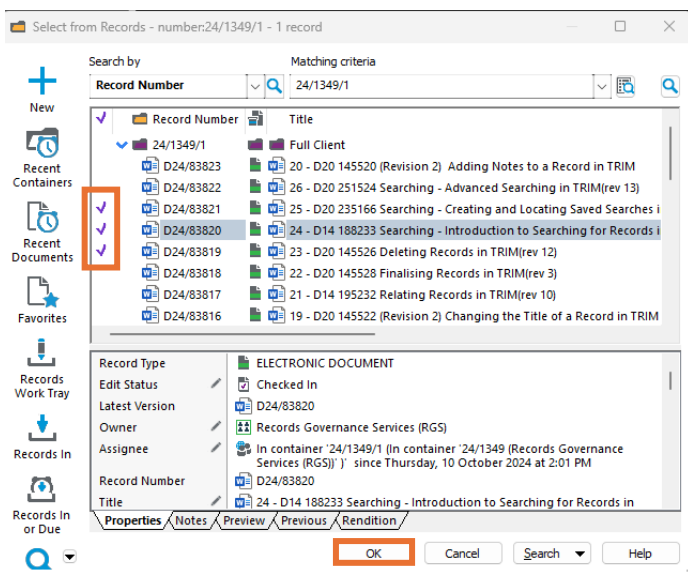
NOTE: You are only able to drag and drop single records for this method, **not** multiple.

Content Manager Tab

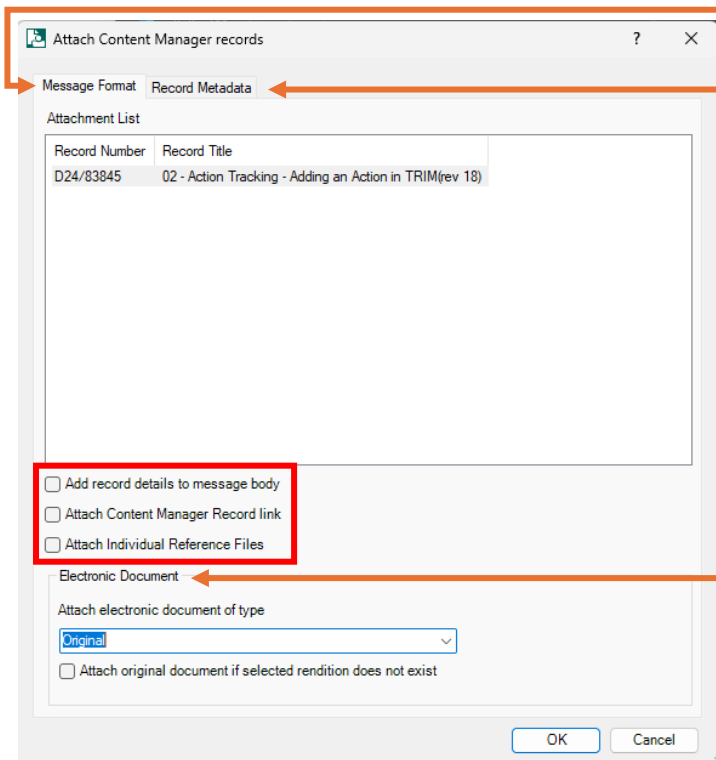
1. From your newly composed email, click on the **Content Manager** tab, then click **Attach Record**:



2. Use the Searching dialogue box to locate the record to attach to the email. If you want to attach multiple records, while still in this window, tag all the records you want to attach then click OK at the bottom of the window:



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



In the **Message Format** Tab:

- **Add record details to message body:** Tick this box if you wish to include any Record Metadata from the **Record Metadata** Tab in the body of the email.
- **Attach Content Manager Record link:** If you're attaching multiple records, this will attach a link to all of the attached records in a single tr.5 file.
- **Attach Individual Reference Files:** This will attach an individual tr.5 file for every record you have selected.

In the **Record Metadata** tab, you can tick to select what data is included in the body of the email when it's sent

In the **'Electric Document'** section,

- If you want to attach the electronic file (e.g. Word document, PDF, Excel) then the drop-down for **'Attach electronic document of type'** should have **Original** selected.
- If you want to attach a tr.5 file only, then the drop-down for **'Attach electronic document of type'** should have **None** selected.

NOTE: Once you have selected the required fields, these selections will become the default selections for the next new email you create with an attached record from TRIM, however you can alter these selections for each new email as required.

4. Click OK to attach the record(s) to your email
5. 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)

