## "HPE Records Manager" (TRIM) toolbar in Outlook

Save an Email or Attachment to TRIM (HPE Records Manager)

1. In Outlook highlight the email that you wish to catalogue (save) into TRIM.

2. From the **"HPE Records Manager toolbar" (TRIM)** select **Check-in**.

    To save attachment(s) only, select **Check-in Attachment(s) Only.**

3. Select the correct **Record Type** from the available list (i.e. **Electronic Document or Email)** and select **OK.**
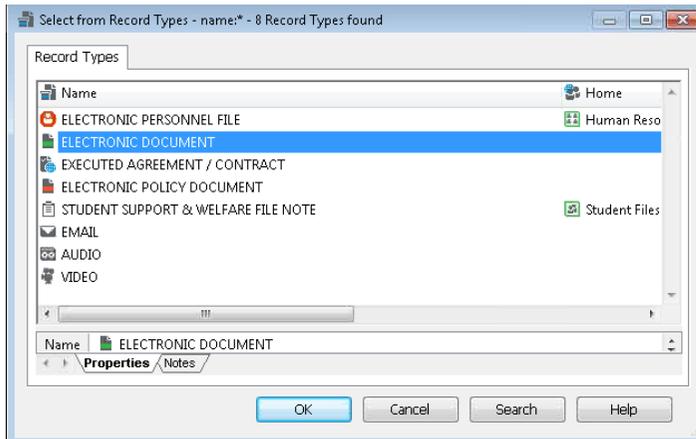
4. In the **Record Entry Screen** complete all the relevant fields. Those marked with a * (red asterisk) **must** be completed.

5. Select **OK** to save.

The email is now saved in TRIM (HPE Records Manager). The subject line of the email will be updated with a prefix of **HPE RM:** followed by the original subject line.

HPE RM: Sample Email

Hint! You can also register emails from your **Sent Items** and other folders in Outlook.

Save an Email on Sending

1. Create a new email in Outlook.

2. Select the "**HPE Records Manager" (TRIM)** Tab on the Ribbon.

3. Select **Check-in on Send.**

4. Fill in the following fields **Record Type** and a **File or Sub Folder** by selecting the blue KwikSelect on the "**HPE Records Manager Folder Properties" (TRIM)** form.

5. Select the **Display data entry form when checking-in messages** select **OK**.

6. Generate the email as normal, once finished select **Send.** The HP Records Manager Record Entry Form will appear complete fields and select **OK**. The email is now saved in HP Records Manager.

Drag and Drop Emails

1. To save Emails from Outlook to **TRIM (HPE Records Manager)**, open both Outlook and **TRIM.**
2. Highlight the email, drag and drop it into the destination File or Sub Folder.
3. Select the correct **Record Type** from the available list (i.e. **Electronic Document or Email)** and select **OK.**
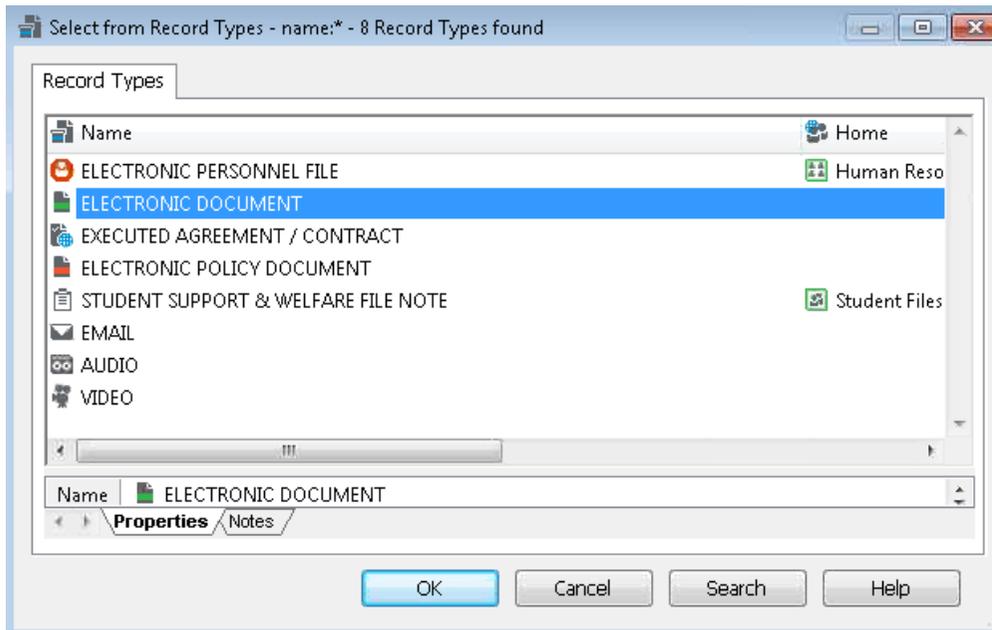
4. Once saved into TRIM, an email icon should appear in the left column.
   If a blank icon appears then the email did not save correctly and should be re-saved.

Send via Email

1. From within TRIM, select a Record you want to send via email. Select the **Send via Email icon** on the Toolbar.
2. The **Send to Mail Recipient** window appears. Select "**HPE Records Manager Record Reference"** if you are sending the email internally this will send a .tr5 reference file, select **Electronic Document** if you are sending the email externally this will send a copy of the document.
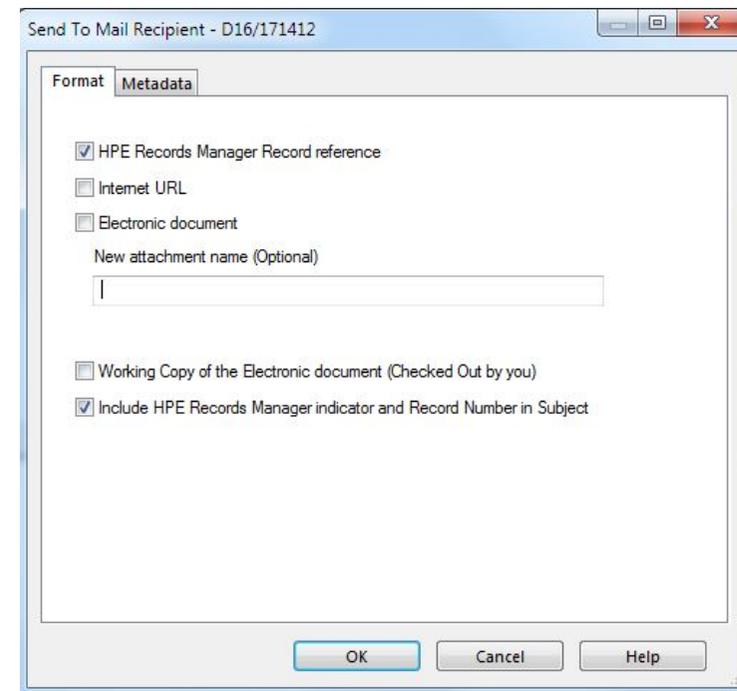
3. Select **OK,** a new email will appear with attachments, send email as normal.