

### TRIM Outlook Ribbon Buttons

TRIM Outlook Integration adds the TRIM ribbon to Microsoft Outlook, which enables you to check in email, open email records and manage 'Check In Styles'.

RIBBON BUTTON	FUNCTION
	Check selected Outlook item(s) into TRIM using the default style or using a record type
	Select a style or record type to use to check the selected Outlook item(s) into TRIM
	Open an Outlook item that has already been checked into TRIM
	On a Linked Outlook folder, click to open the linked container or classification
	Check in the Outlook item(s) attachments
	Click to turn on or off the Progress bar. This allows you to monitor the progress of the check in processes
	Click to turn on or off the Check In Styles panel. This allows you to view, create and modify Check In Styles, Linked Folders and default Check In Style settings to be used when checking mail items into TRIM
	Click to open the generated log file
	Click to open the help file

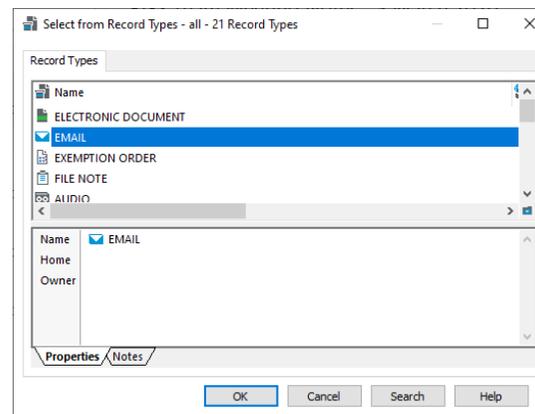
### Check an email into TRIM

There are two methods to check an Outlook email into TRIM:

#### Drag and Drop

This method allows you to drag an email from Outlook and drop it directly into TRIM to be checked in

1. Open TRIM and locate the container the email will be checked in to
2. Open Outlook, select the required email, drag across to TRIM and release on top of the previously located container
3. Select the required record type (Email) and click OK

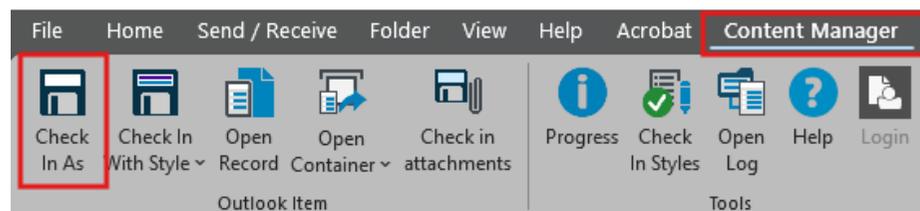


4. Proceed to populate the Email Check In (registration) form, click OK.

#### Check In As

This method utilises the **Check In As** button on the TRIM Ribbon in Outlook

1. Open **Outlook**, select the email that is required to be checked into TRIM
2. Click the Content Manager tab on the Outlook ribbon and select **Check In As**



3. Follow steps [3](#) and [4](#) above to complete

### Create a Check In Style

**Check In Styles** are a method to pre-define criteria for registering a record into TRIM. After creating a **Check In Style** a user can bypass entering the pre-defined criteria by selecting the Check In Style at the time of registration.

*Tip\*\* This feature is useful when registering multiple records into TRIM that contain matching criteria fields e.g. all records are the same record type, all records have the same author, OR all records need to be registered to the same container.*

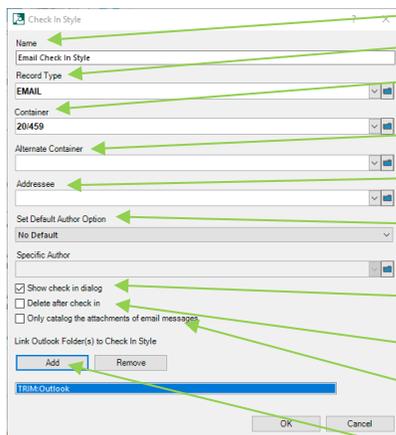
1. Open **Microsoft Outlook** and click the Content Manager tab. Select 'Check In Styles' from the Tools section



2. The Content Manager **Check In Styles** dialog box will open, click the 'plus' sign to create a new **Check In Style**.



3. The **Check In Style** creation form will open



- Name:** Title the Check In Style
- Record Type:** Select Email for Outlook
- Container:** Enter TRIM Record Number if all emails will be saved to the same container; otherwise leave blank
- Alternate Container:** Additional Container if required
- Addressee:** Select appropriate TRIM location if all emails have the same addressee; otherwise leave blank
- Set Default Author Option:** Select specific TRIM location if all emails have the same author; otherwise leave at 'No Default'
- Show check in dialog:** New Record Registration form will appear as each record is processed
- Delete after check in:** Deletion of email from Outlook after saving to TRIM
- Only catalog the attachments of email messages:** Will only save the attachment; not the whole email

Linked Outlook Folder(s) to Check In Style: Click Add to select an Outlook Folder to link the Check In Style to.

### Link an Outlook Folder to TRIM via a Check In Style

This functionality allows the user to apply a Check In Style to an Outlook folder. Once linked, the user can drag and drop an email into the Outlook Folder and automatically register the email into TRIM using the previously defined criteria.

*Tip\*\* This feature is useful when registering multiple records into TRIM that contain matching criteria in ALL fields e.g. all records contain the same record type, same author AND are registered to the same container.*

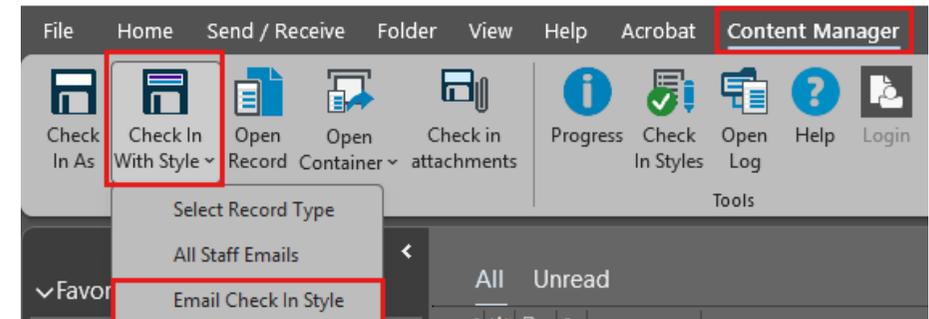
*In this scenario the user is able to drag and drop emails into the linked Outlook Folder and completely bypass the data entry form for efficiency.*

### Check In With Style

This method utilises the **Check in With Style** button on the TRIM ribbon in Outlook

*Tip\*\* Refer to [Create a Check In Style](#) for more information on when to utilise this function*

1. Open Outlook, select the email that is required to be checked into TRIM
2. Click the Content Manager tab on the Outlook ribbon and select **Check In With Style**
3. Select the required check in style from the drop down



4. The New Email Check In form will appear
5. Confirm details and click **OK** to check in

### Check in via Linked Outlook Folders

*Tip\*\* Refer to [Link an Outlook Folder to TRIM via a Check In Style](#) for more information on when to utilise this function*

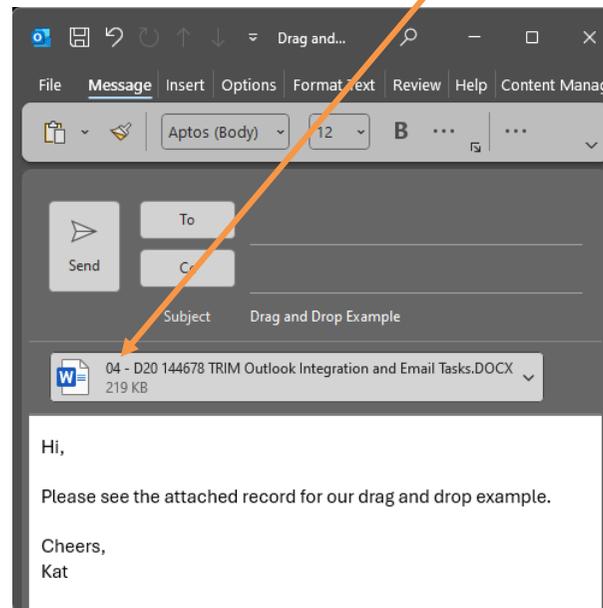
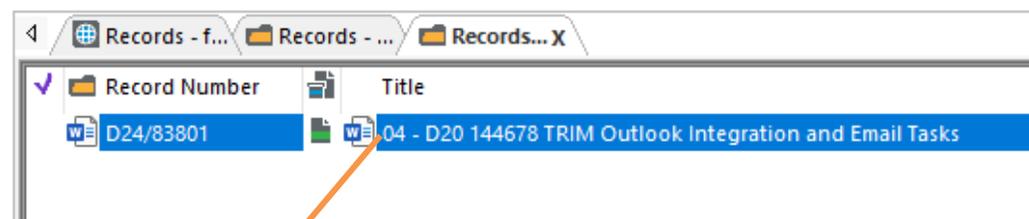
1. Follow the steps above in **Link an Outlook Folder not TRIM via a Check In Style** to configure an Outlook Folder
2. Once configured, drag and drop an email to the linked Outlook folder
3. Outlook will utilise the **Check In Style** previously defined and the **New Email Check In Form** will appear

### Attach a Record when composing a new Email

As a part of Outlook integration, you have the ability to attach a record from TRIM when composing a new email.

#### Drag and Drop

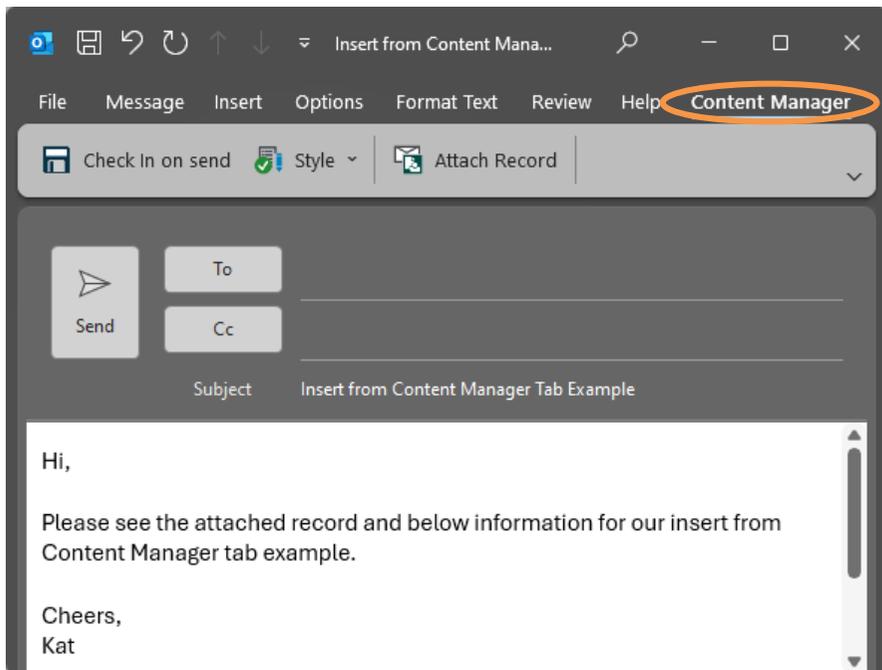
1. From Outlook, compose your email.
2. Locate the Record in TRIM that you want to attach to your email.
3. Drag and drop the record over to your newly composed email:



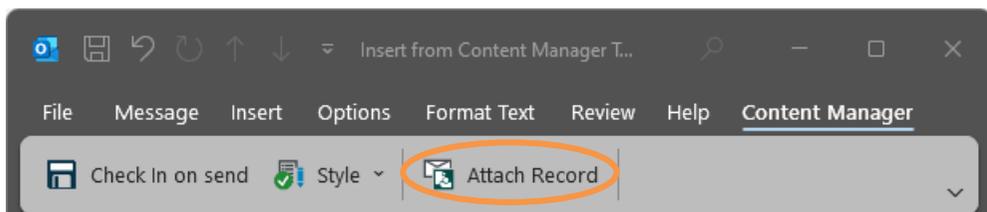
4. The record should now appear as an attachment in your email.
- Note:** You are only able to drag and drop single records for this method, **not** multiple.

### Content Manager Tab

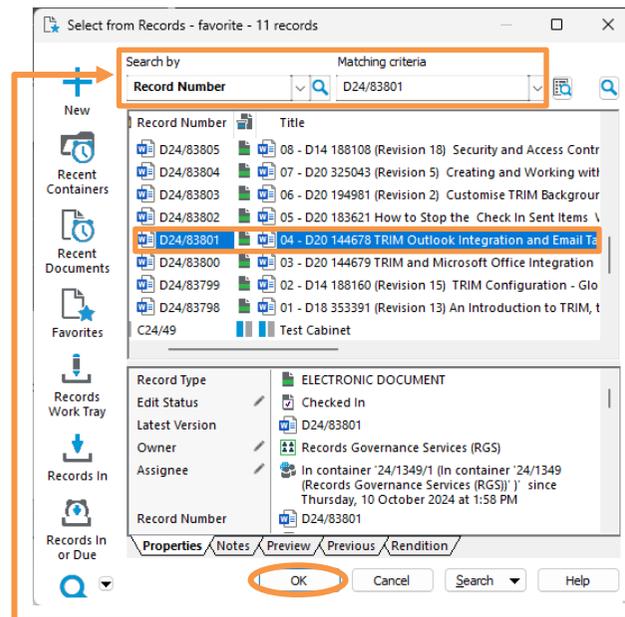
1. From your newly composed email, click on the **Content Manager** tab:



2. Click **Attach Record**:



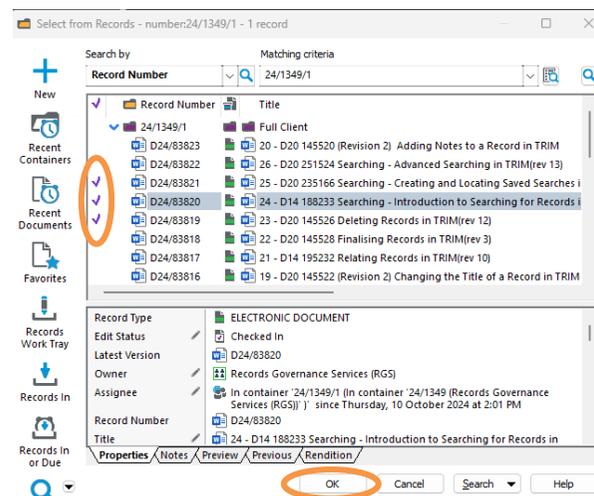
3. The **'Select from Records – favorite'** window will appear.



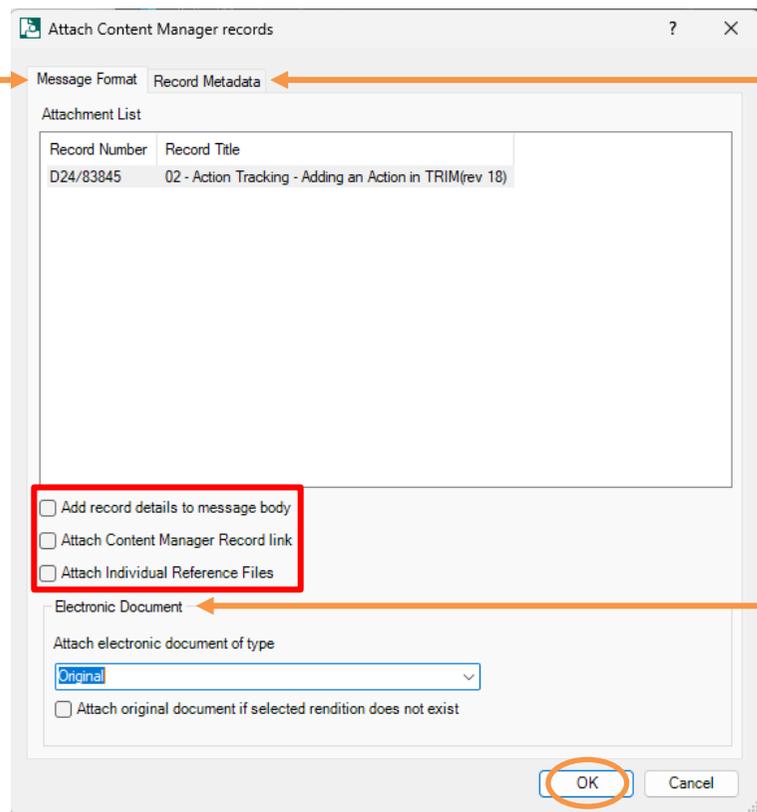
The 'Favorite' window is the default window that will open. If the record you want to attach is located within your Favorites, then you will only need to select the record so that it is highlighted blue, and then click **OK** at the bottom of the window.

If the record is located elsewhere, you can **Search by the Record Number**. When found, click to highlight it blue, then click **OK** at the bottom of the window.

If you want to attach multiple records, while still in the **'Select from Records – favorite'** window, tag the records that you want to attach to your email, then click **OK** at the bottom of the window:



4. The 'Attach Content Manager records' window will appear:



5. 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.

**What is a tr.5 file?** A tr.5 file is a file that when opened, takes you to that record, or records, in TRIM that it relates to.

6. In the **Record Metadata** Tab, you can tick to select what data is included in the body of the email when it is sent.

**Note:** Record Metadata will only be included if you have the 'Add record details to message body' box ticked.

7. In the '**Electronic 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.

8. When you have finished customising the **Message Format** and the **Record Metadata** Tabs, click **OK**.

9. The TRIM window will close, and you will be able to see the record and any other customisations you made to your previously composed email:

