TRIM9 Outlook Ribbon Buttons

TRIM9 Outlook Integration adds the TRIM9 ribbon to Microsoft Outlook, which enables you to check in email, open email records and manage 'Check In Styles'.

| RIBBON BUTTON	FUNCTION
Check In As	Check selected Outlook item(s) into TRIM9 using the default style or using a record type
Check In With Style	Select a style or record type to use to check the selected Outlook item(s) into TRIM9
Open Record	Open an Outlook item that has already been checked into TRIM9
Open Container	On a Linked Outlook folder, click to open the linked container or classification
Check in attachments	Check in the Outlook item(s) attachments
Progress	Click to turn on or off the Progress bar. This allows you to monitor the progress of the check in processes
Check In Styles	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 TRIM9
Open Log	Click to open the generated log file
Help	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 TRIM9 to be checked in

1. Open TRIM9 and locate the container the email will be checked in to
2. Open Outlook, select the required email, drag across to TRIM9 and release on top of the previously located container
3. Select the required record type (Email) and click OK
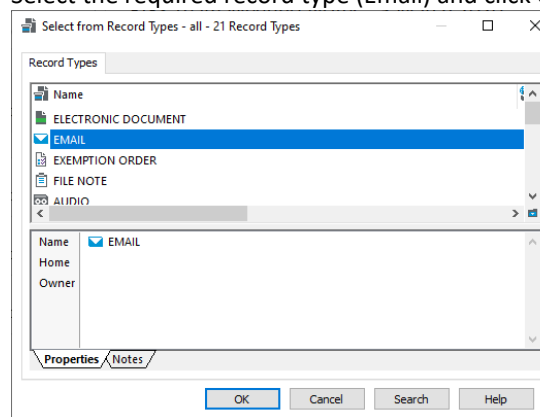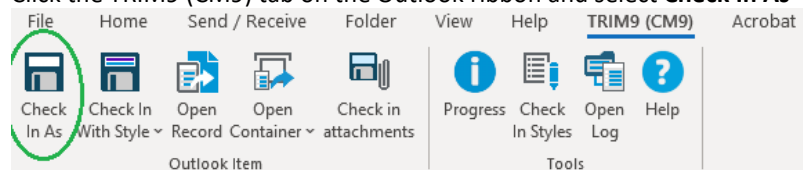

4. Proceed to populate the Email Check In (registration) form, click OK

Check In As

This method utilises the **Check In As** button on the TRIM9 Ribbon in Outlook

1. Open **Outlook**, select the email that is required to be checked into TRIM9
2. Click the TRIM9 (CM9) tab on the Outlook ribbon and select **Check In As**

3. Follow steps 3 and 4 above to complete
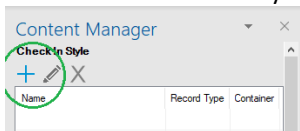
Create a Check In Style

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.
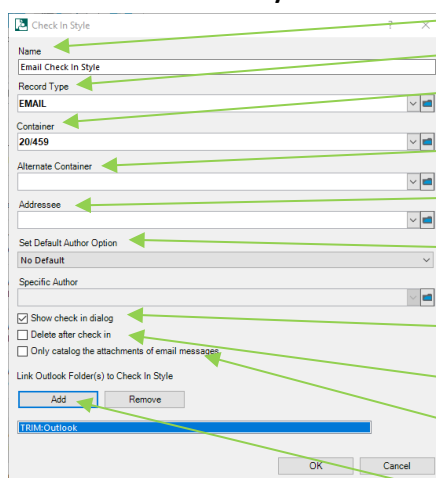
1. Open **Microsoft Outlook** and click the '**TRIM9 (CM9)**' tab. Select 'Check In Styles' from the Tools section
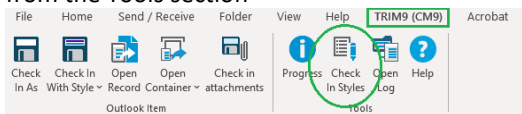
2. The Content Manager **Check In Style dialog box** will open, click the 'plus' sign to create a new Check In Style.

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 TRIM9

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.
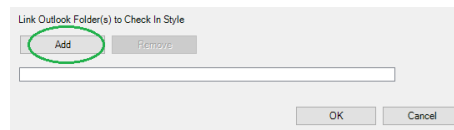
1. Open **Microsoft Outlook** and click the '**TRIM9 (CM9)**' tab. Select 'Check In Styles' from the Tools section
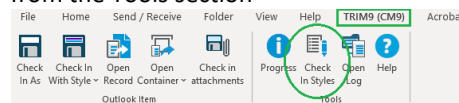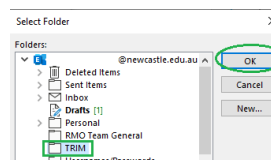

2. The Content Manager **Check In Style dialog box** will open. Highlight the required Check In Style and click the '**Edit Check In Style'** button
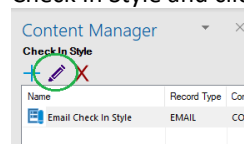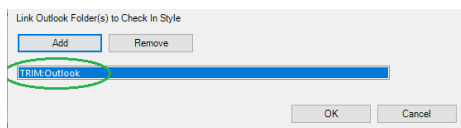

3. Click **Add** at the bottom of the Check In Style creation form

4. Highlight the Outlook Folder to be linked to the check in style, click **OK**

5. The Outlook Folder will now be added to the Check In Style Form, click **OK**


Check an email into TRIM using a Check In Style

There are two methods to check an Outlook email into TRIM using a Check In Style

Check In With Style

This method utilises the **Check In With Style** button on the TRIM9 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 TRIM9
2. Click the TRIM9 (CM9) tab on the Outlook ribbon and select **Check In With Style**
3. Select the required check in style from the drop down
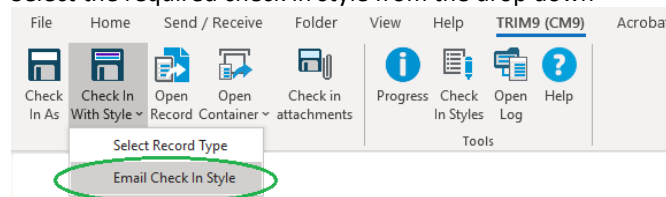
4. The New Email Check In form will appear
5. Confirm details and click OK to check in

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 to TRIM via a Check In Style** to configure an Outlook Folder

2. Once configured, drag an email to the linked outlook and release

3. Outlook will utilise the **Check In Style** previously defined and the **New Email Check In Form** will appear.