

# Linked Folders in Outlook

Imagine if you could reduce the amount of data input required when savings emails into TRIM!

Did you know you can create links between folders in Outlook and folders in TRIM?

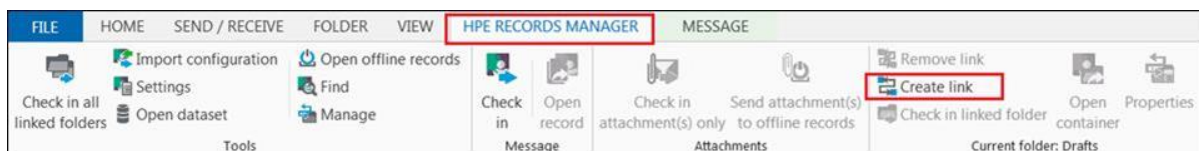
This feature allows users to “create links” to TRIM on an existing Outlook email folder. This link enables users to streamline the cataloguing process of emails into TRIM by predefining some default settings, therefore reducing manual metadata input.

Outlook links are a 1:1 relationships – that is, one Outlook folder can only link to one specific TRIM folder.

Note – this feature does not work on shared/positional accounts - please only use on folders in individual Outlook

## Creating a linked folder from Outlook

- From Outlook, locate or create a new folder for linking to a specific TRIM folder
- Highlight the Outlook folder and select the **HPE RECORDS MANAGER** tab in your Ribbon → Click **Create Link**



- Alternatively, select and highlight the required Outlook folder → Right Click → **Create Link**
- The **HPE Records Manager folder properties** form will be presented

**Outlook folder** – Prepopulates from the folder selected

**HPE Records Manager Dataset** – Defaults to the Production dataset

**Record Type** – Select the required record type – EMAIL

**Container** – Search and select or enter the TRIM folder record number applicable

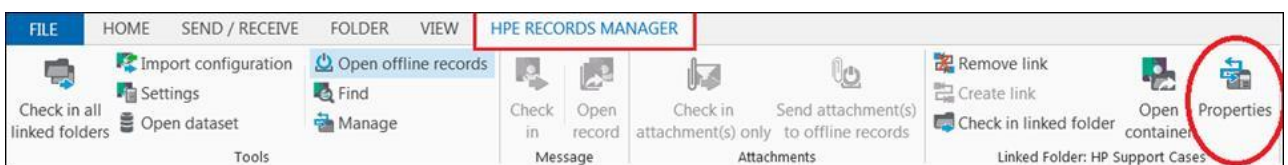
**Display data entry form when checking in messages** – Selecting this option ensures the data input form is presented to check and amend metadata fields

**Delete messages when checked in to HPE Records Manager** – Select if you want the email to delete automatically from Outlook after saving

- Once you have filled the above field → Click OK. The folders are now linked.

## Modify a linked folder from Outlook

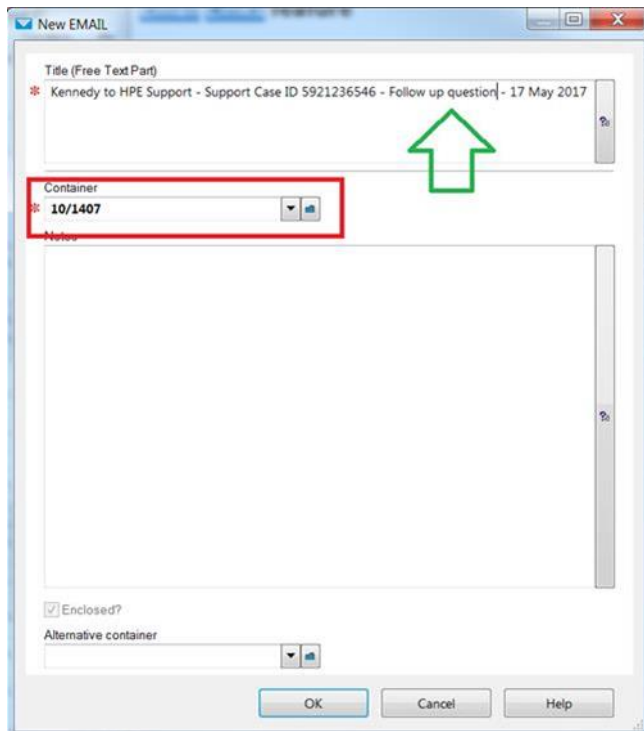
- From Outlook, locate the existing linked folder
- Highlight the Outlook folder and select the **HPE RECORDS MANAGER** tab in your Ribbon → Click **Properties**



- Alternatively, select and highlight the required Outlook folder → Right Click → **HPE Records Manager** → **Properties**
- The **HPE Records Manager folder properties** form will be presented. Amend as required → Click OK

## Processing emails from linked folders

Now that you have created a linked folder, each time you place an email into that Outlook folder, TRIM will present the Record Entry form if you have selected the 'Display data entry form when cataloguing messages' option.



**Title** – The Title will automatically populate with the subject line of the email. This title should be reviewed and updated to ensure an appropriate title is created. In addition, ensure you remove 'RE:' and 'FW:' from the start of your document titles.

The general guide for naming conventions on emails is as follows:

[Sender] to [Recipient] – [Subject] – [Date – if necessary]

- Kennedy to McElhinney – Update on TRIM Implementation Project – March 2017
- Brown to Smith – Outstanding Tasks – Graduation Ceremony – April 2017

**Container** – this field will automatically populate with the TRIM folder record number you configured when linking the folder.

If you *did not* select the 'Display data entry form when cataloguing messages' option it will automatically process the email into the TRIM folder without displaying the Record Entry form.

Note – TRIM will use the subject line of the email to populate the title of the record in TRIM. If you have chosen *not* to 'display the data entry form when cataloguing messages' please ensure subject lines of email are titled appropriately prior to dragging into the linked Outlook folder.

## Tips and Hints

**Rules** – You can set up your email system to automatically forward certain received email to your linked folder. See your Outlook Help file for further information.

**Cancelling items dropped into a linked folder** – click the *Cancel* button to cancel the creation of an item in TRIM. The items are still moved to the selected folder in Outlook, however will prevent saving the record in TRIM. The user will need to use the *Clear Backlog* button to reprocess the items.

**Clear Backlog** – In the event that records have been moved into the selected folder but have not saved to TRIM, you will need to use the *Clear Backlog* function. Right click on the linked folder in Outlook → HPE Records Manager → Clear Backlog. All emails located in this folder will now be processed.

**Linked folders – Sent Items folder** - It is not possible to make a link to the Sent Items folder to capture all outgoing messages. You can however drag selected emails from your Sent Items to an existing linked folder if required.

**Remove Link** – to remove a TRIM link from an Outlook folder, right click on the linked folder → HPE Records Manager → Remove Link.

## **Link to Knowledge Guides**

- [Click here](#) for further information on saving emails into TRIM