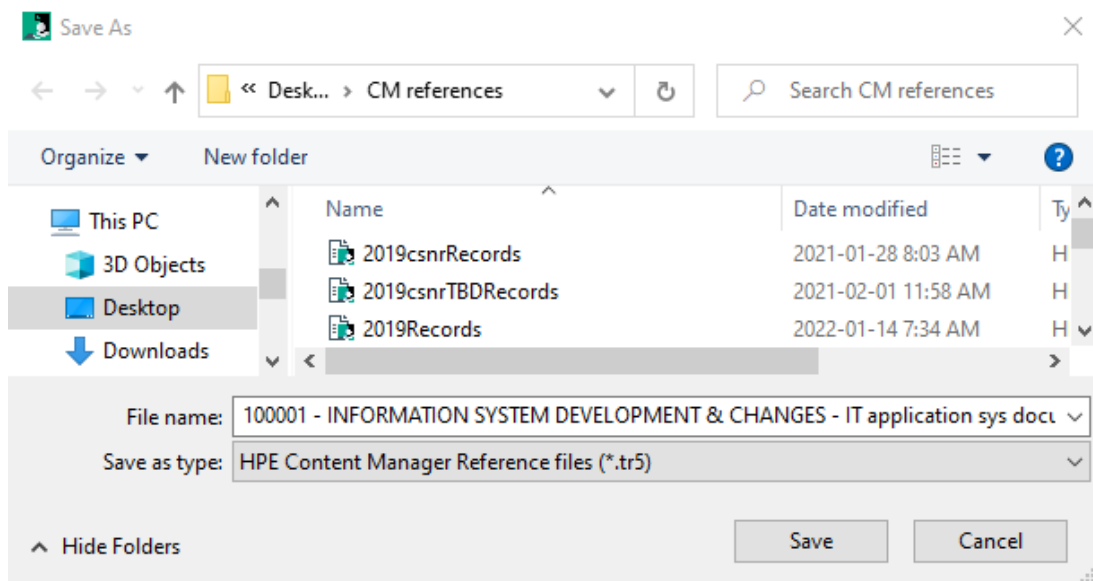


Creating a Reference & Sending a Document via Email

NOTE: EDRMS Content Manager references allow users to share EDRMS Content Manager records with users via email. A reference is much smaller to send via email than an actual file and gives the user direct access to the record(s). Users can only view files their permissions allow.

Creating a single Reference:

1. Tag record
2. Right click, **Send To, Save Reference**.
3. The **Save As** pop up appears, choose where you want to save it (e.g. Desktop or folder on LAN). The file name is prefilled by the system but can be updated.

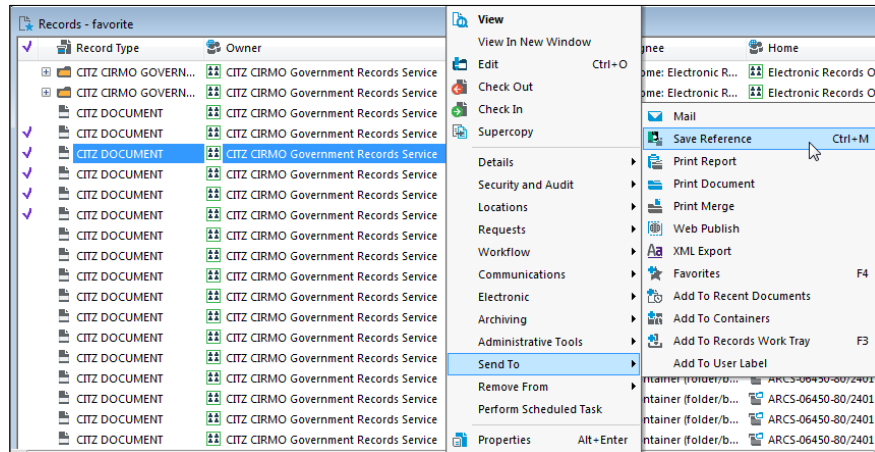


4. Click **Save**.
5. In Outlook create a new email, click **Attach File**. Locate reference file (.tr5) in the recent items or choose Browse this PC, **Insert**, compose & send email OR drag the reference from your desktop into an open email. The recipient must be an EDRMS Content Manager user and have access to the relevant dataset.

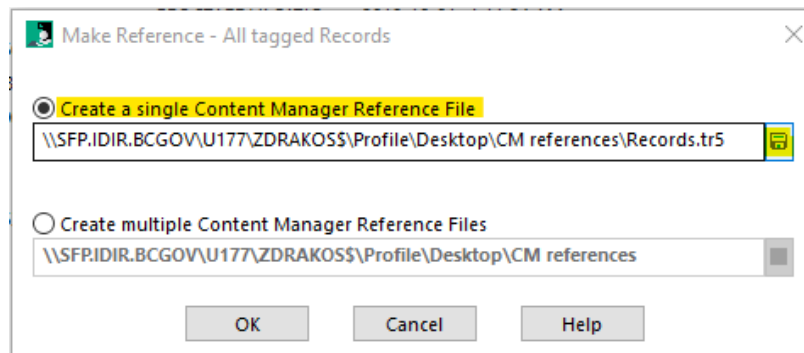
EDRMS CONTENT MANAGER TIP 008

Creating a single reference to multiple records:

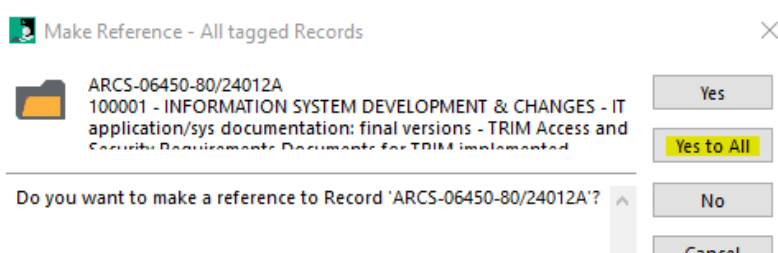
1. Tag records
2. Right click, **Send To, Save Reference**.



3. On popup **Make Reference - All tagged Records**, select **Create a Single Content Manager Reference file**, select the **disk icon** on the right to choose where to save the reference file to (e.g. desktop or folder on LAN) and name it, then click **OK**.



4. Click **Yes to All**.

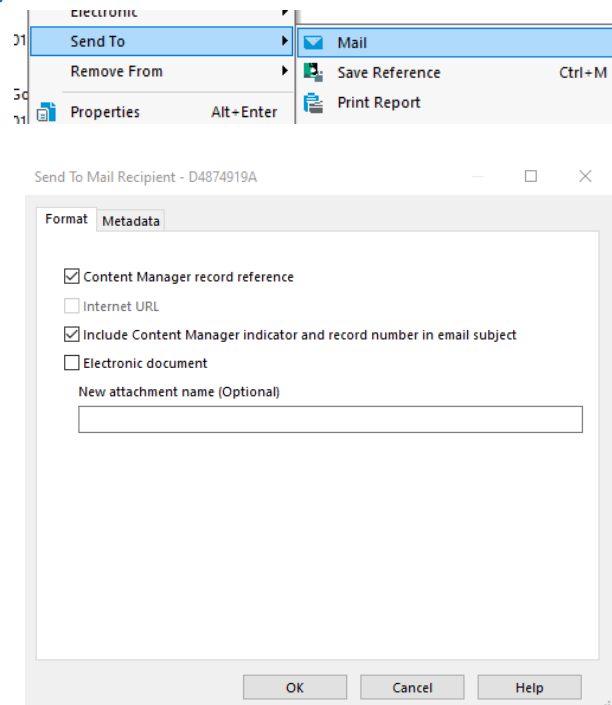


5. In Outlook click **Attach File**. locate reference file (.tr5), **Insert**, compose & send email. The recipient must be an EDRMS Content Manager User and have access to the relevant EDRMS Content Manager dataset.

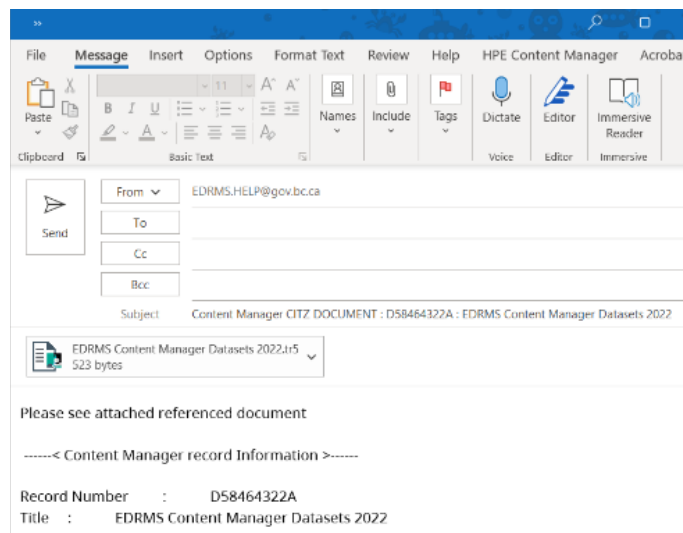
EDRMS CONTENT MANAGER TIP 008

Sending reference for a SINGLE record:

1. Right click on the record, **Send To, Mail**.
2. On the **Format** tab of the **Send to Mail Recipient** popup:
 - a. Check the **Content Manager Record Reference** box.
 - b. Make sure the **'Include Content Manager indicator and record number in email subject'** box is checked.
 - c. Click **OK**.



3. An email will be generated. The appropriate subject line will be pre-populated, and a EDRMS Content Manager reference to the record you want to email will be attached.



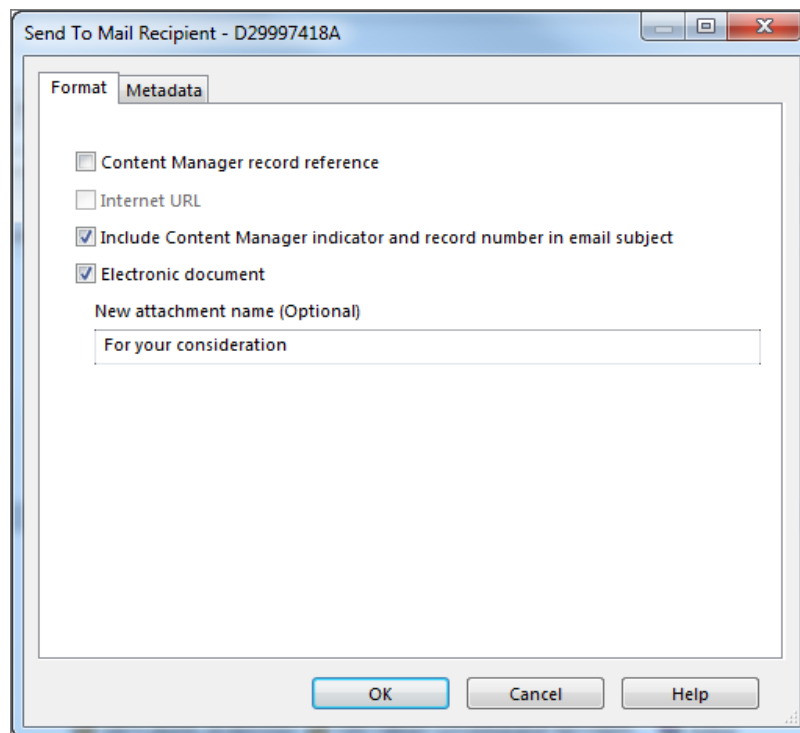
Sending a record by email:

If you have a business need to share an electronic record, rather than a reference to a record (for example, with someone who is not an EDRMS Content Manager user, or who does not have access to the dataset the record comes from) you can email the document directly to them.

1. Select the document to send.
2. Right click, select **Send to, Mail**.

In the **Send to Mail Recipient** popup:

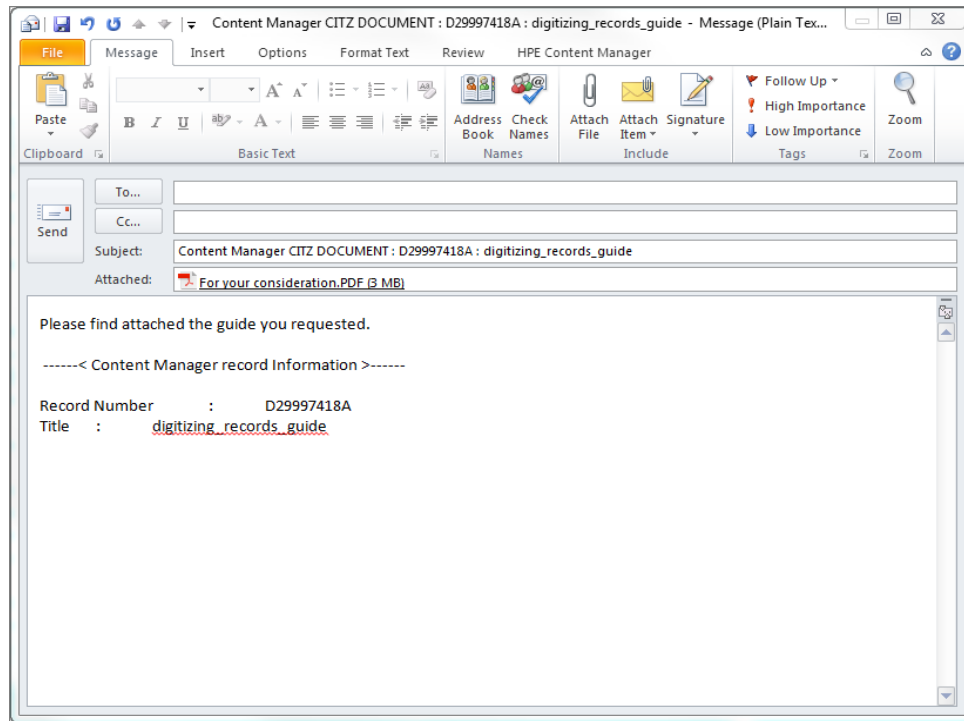
- If "**Content Manager record reference**" is checked, *uncheck* the box.
- Check **Include Content Manager indicator and record number in email subject**.
- Check **Electronic document**.
- In the optional **New attachment name** field, give the attachment an alternative name if desired. Click **OK**.



Note: To prevent a privacy breach or information incident do not send an electronic document that could contain personal information or confidential information of a client or employee to anyone not authorized to view it.

EDRMS CONTENT MANAGER TIP 008

3. On the **Email form**, enter a mail recipient and any appropriate message. The record details will be displayed as the Subject line, and the document will be attached.



4. Click **Send**.

About References:

- You can make a reference to locations and classifications as well as box, folder, or document types of records.
- Putting records in a reference does not remove or check them out in EDRMS Content Manager and does not affect other users' ability to view or modify those records.
- The records in a reference file will always be current. If a record changes after you save a reference, you will see the updates when you open that reference.
- References maintain the sort order you saved them with.
- References will stay on your desktop or the folder you put them in until you delete them.
- You cannot add records to an existing reference.