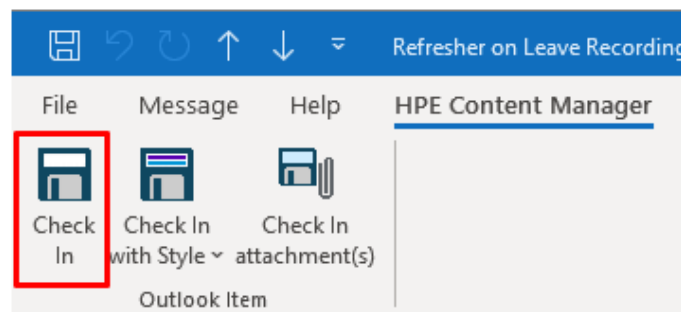


# Creating a Check In Style for Filing Emails Using HPE Content Manager Outlook Add-In

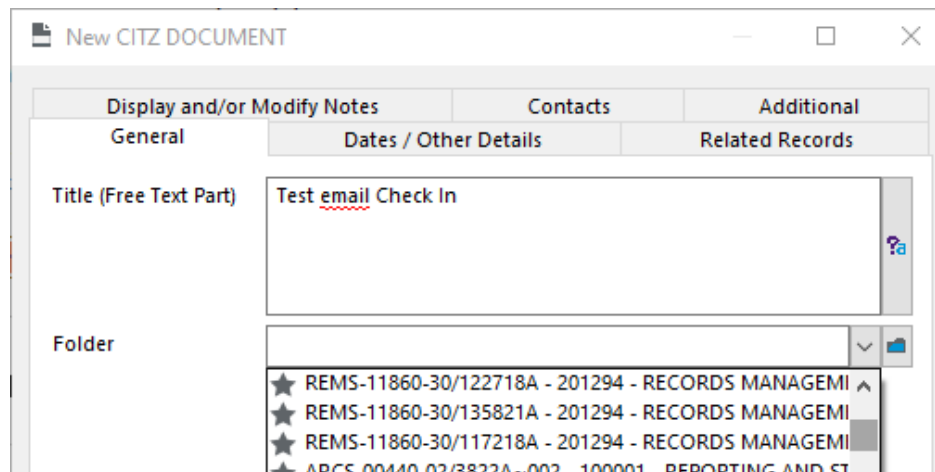
**NOTE:** Check In Styles link Outlook email folders with EDRMS Content Manager folders. Emails filed in these Outlook folders will be checked in to the folder you specify in EDRMS Content Manager. The **HPE Content Manager** tab in **Outlook** is used to create check in styles and check in documents.

## To Check In a single email:

1. Open the email you want to check in and select the **HPE Content Manager** tab.
2. Select **Check In**



3. The **New Document** pop up appears. The **Title** is automatically input from the email subject line. If you want, you can update it here **BUT** it will not change the actual subject line of the email.

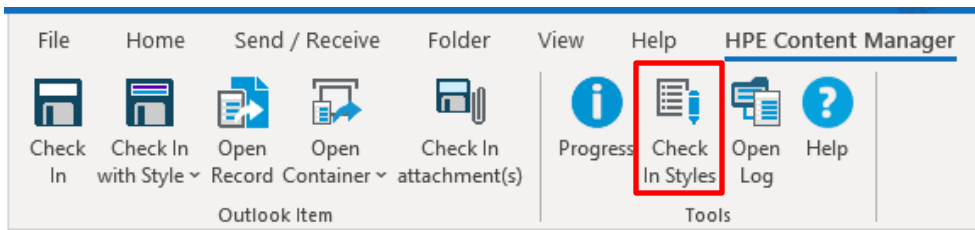


4. Use the drop down to select a recently used folder OR click the blue **KwikSelect** folder icon to search for the folder to file into and click **OK**. The email will be processed, and you will now see it is in EDRMS CM in the folder you selected.

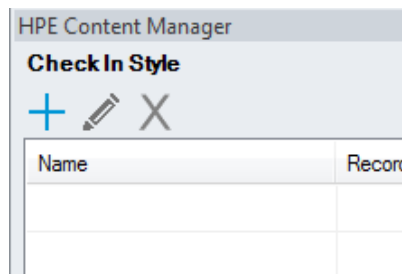
## EDRMS CONTENT MANAGER TIP 006

### To Create a Check In Style in Outlook:

1. On the **HPE Content Manager** tab, select **Check In Styles**.



2. The **Add-in** will appear on the right of your Outlook program. To **Create a new Check In Style**, select the **+ sign**.



3. Complete this form in the **Check-In Style** window popup for each **Check In Style** you wish to create, choosing your own ministry Record Type. You can create as many Check In Styles as needed.

A screenshot of the 'Check In Style' dialog box. It contains the following fields and controls:

- Name:** A text box containing 'Check In Style Fun'.
- Record Type:** A dropdown menu showing 'CITZ DOCUMENT' with a blue 'KwikSelect' button to its right.
- Container:** A dropdown menu showing '100001 - INFORMATION SYSTEM OPERATIONS - Reported incidents and us' with a blue 'KwikSelect' button to its right.
- Show check in dialog:** An unchecked checkbox.
- Delete after check in:** A checked checkbox.
- Link Outlook Folder(s) to Check In Style:** A section with 'Add' and 'Remove' buttons and an empty text box below them.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

**Name:** The name of the **Check-In Style**, we recommend you name it the same as the outlook folder for ease of reference.

**Record Type:** Select your record type from drop down or search for it using the blue **KwikSelect** folder button.

## EDRMS CONTENT MANAGER TIP 006

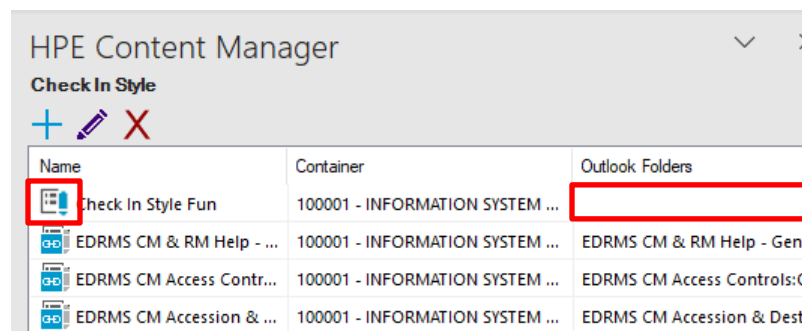
**Container:** The location of where the email will be filed in EDRMS. Search for location using the blue **KwikSelect** folder button or type/paste in the folder record number.





**Show check in dialog:** If you want to be prompted with a check in form for each email, select this option. It allows you to edit the title of an email more accurately as it is being checked in. This will **NOT** update the subject line of the actual email only the **Title** in EDRMS Content Manager.

If this is not selected, the subject of the email will be used as the **Title** and check in will be faster.

**Delete after check in:** If you'd prefer to move the filed emails into your Outlook deleted folder after they are checked in to EDRMS Content Manager, select this box. **This is a recommended best practice.**

- Once you have created **Check In Styles**, you will see a list of them in the window. The **Container** column displays the structured title as well as the Title Free Text Part only. If the **Check in style** is not linked to an Outlook folder the **Outlook Folders** column will be empty and the icon under **Name** does not show a blue linked image.




Name	Container	Outlook Folders
 Check In Style Fun	100001 - INFORMATION SYSTEM ...	
 EDRMS CM & RM Help - ...	100001 - INFORMATION SYSTEM ...	EDRMS CM & RM Help - Gen
 EDRMS CM Access Contr...	100001 - INFORMATION SYSTEM ...	EDRMS CM Access Controls:C
 EDRMS CM Accession & ...	100001 - INFORMATION SYSTEM ...	EDRMS CM Accession & Dest

### Linking Check In Styles:

Linking a Check In Style to an Outlook folder allows you to move emails into that outlook folder and automatically have the emails uploaded into EDRMS Content Manager. You can also choose to link the Outlook folder to the Check In Style only when you are ready to file.

#### To link a Check In Style to an Outlook Folder:

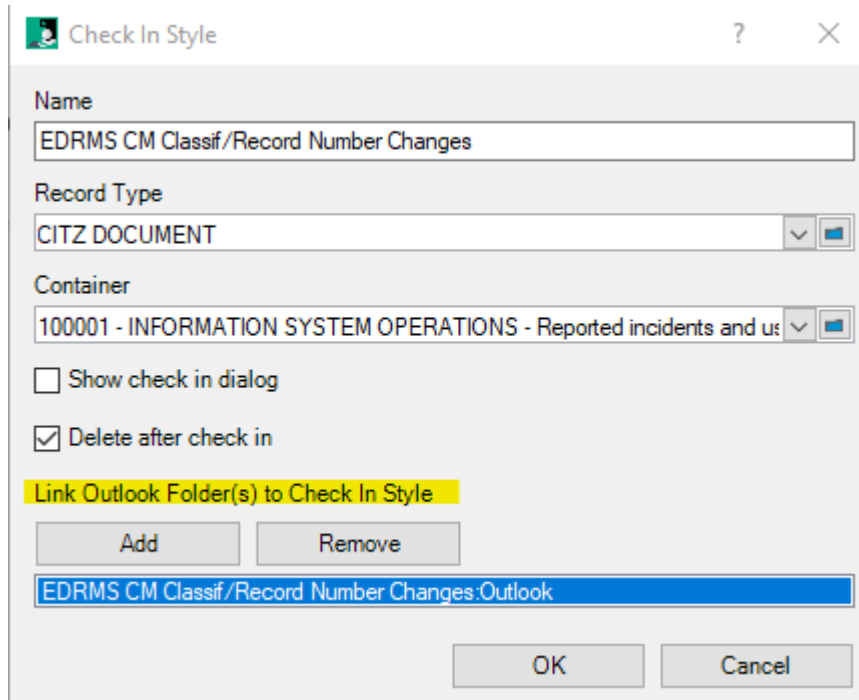
1. Select the new **Check In Style** from the list.
2. Select the pencil icon  at the top of the list to edit the style.
3. On the **Check In Style** popup:
  - Check **Delete after Check in**. This deletes the email from Outlook once it has been moved to EDRMS Content Manager, as is **recommended as best practice**.

## EDRMS CONTENT MANAGER TIP 006

- In the **Link Outlook Folder(s) to Check In Style** area, select **Add**.
- Select an Outlook folder from your folders list and click **OK**.
- Click **OK** to save the changes to the Check In Style.

The Check In Styles will be displayed in the **HPE Content Manager Check In Style** list with links, indicating that they are linked to EDRMS Content Manager.

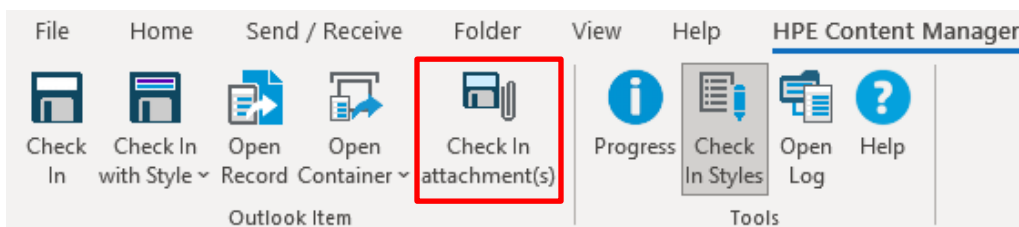
Now when you add a document to one of your linked Outlook folders, it will be automatically added to the EDRMS Content Manager folder you defined in the **Check In Style**.



### Check In Attachment(s) Only:

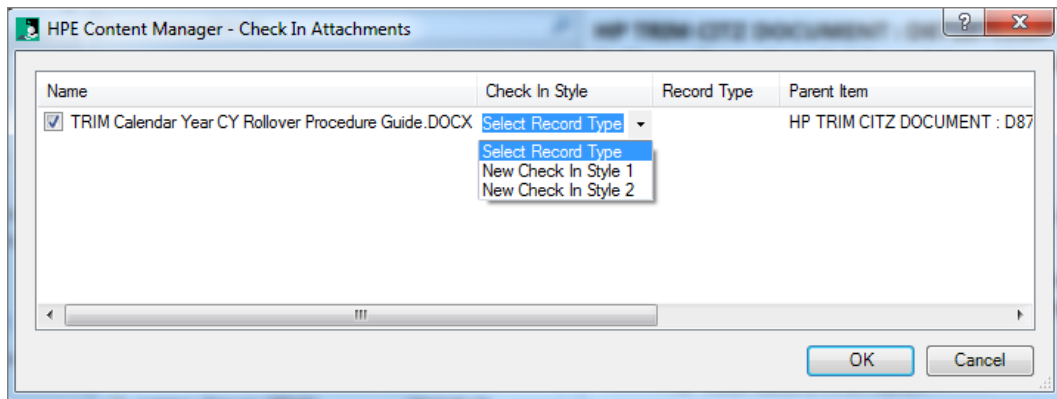
You can also check in just the attachment(s) from an email. To do this:

1. Select the email in Outlook. If you don't select an email, you cannot continue. (If you select an email without attachments, you will receive a message "Unable to check in attachment(s).")
2. Select **Check In attachment(s)**.

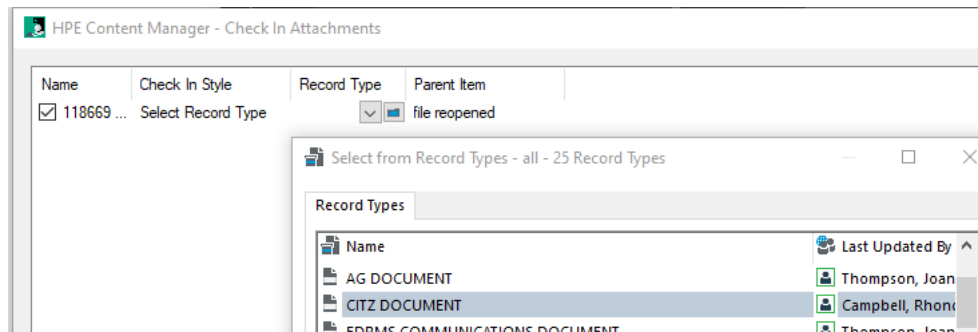


## EDRMS CONTENT MANAGER TIP 006

3. You will automatically be prompted with a window from **EDRMS Content Manager**. It will list each attachment separately, pulling the exact title of the attached document into the table below.
4. On the **Check In Attachments** popup:
  - Select one of your Check In Styles from the **Check In Style** dropdown. Click **OK** and the attachment will be uploaded as per your check in style,
  - OR**



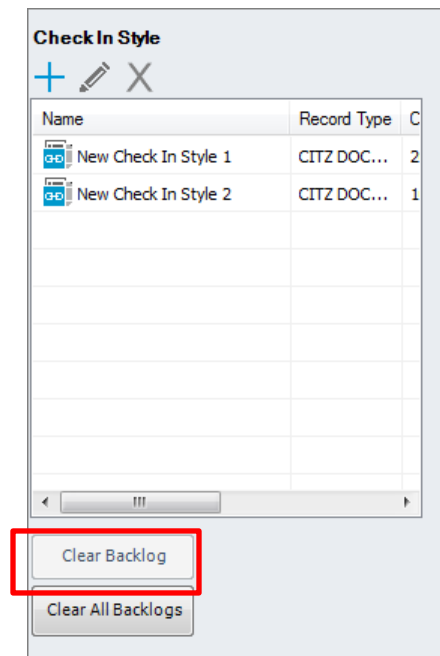
- Hover under the record type column to find the drop down to select your record type to use, a **Select from Record Types** pop up appears and if you click on the blue (**Kwikselect**) folder icon you can select the one to use and the check in form will appear to select where to file the document.



- Click **OK**.

## About Linked Folders

When moving many items into an Outlook folder, they may not all be processed into EDRMS Content Manager immediately, and no error message will be displayed. If this happens, and you notice emails without the **EDRMS CM: indicator**, select the Check In Style then **Clear Backlog** in the **HPE Content Manager Check In Style** panel in Outlook. Any unprocessed items will then be cleared from the folder if you have selected **Delete after check-in** option.



**Clear All Backlogs** should only be selected if you wish to upload unprocessed items from **all** of your Outlook folders linked to **all** your Check In Styles linked to EDRMS Content Manager. **Please exercise caution if you do not wish to complete processing on ALL the folders with linkages.**

Never link Outlook folders such as **Inbox**, **Sent Items** or **Drafts**, to EDRMS Content Manager. You can select a single item from one of these folders to check in instead.

Always remember to **remove an Outlook linked folder** if you do not want it to automatically check emails into EDRMS Content Manager. You can keep the related **Check in Style** in case you want to use it again in future; you will have the ease of a relinking when you next want to clear the backlog.

Please delete and remove **Check In Styles** if they are no longer being used as it is easier to find them if there isn't so many listed.