Tip 040: Sending a Record via Email

Primary Audience: All Users

Purpose: 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 record directly to them.

Refer to Tip 017: Creating a Reference for One or More Records.

To send a record via email:

1. Locate and select the record you want to send.
2. Right click on it and select Send to and then Mail.
3. In the **Send to Mail Recipient** popup:
   a. Check **Include Content Manager indicator and record number in email subject**.
   b. Check **Electronic document**.
   c. In the optional **New attachment name** field, give the attachment an alternative name if desired.
   d. Click **OK**.

![Send To Mail Recipient - D29997418A](image)
4. On the Email form, enter a mail recipient and any appropriate message. The record details will be displayed as the Subject line, and the record will be attached.

5. Click Send.