

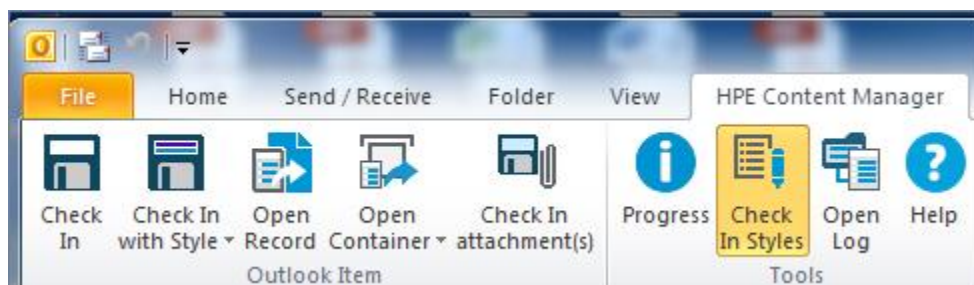
Tip 042: Creating a Check In Style for Email TIP 042

Primary Audience: All Users

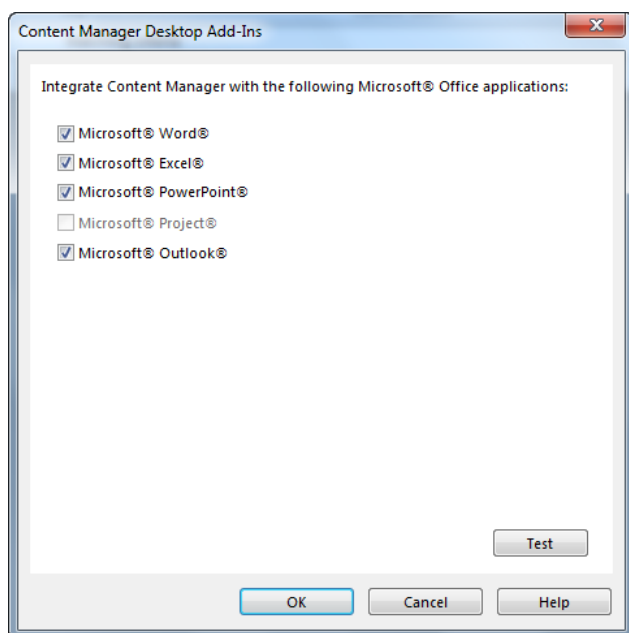
Purpose: Check In Styles (commonly referred to as Linked Outlook Folders) link specific MS Outlook email folders with specific EDRMS Content Manager folders. Emails filed in these Outlook folders will be checked in as defined by the Check In Style, to the folder you specify in EDRMS Content Manager. There is a one-to-one relationship between an Outlook folder and an EDRMS Content Manager folder.

In TRIM, we catalogued emails. In EDRMS Content Manager, **we check in documents** (including emails).

There is no Right Mouse Click option to send an email into EDRMS Content Manager. Instead, you will be using this HPE Content Manager toolbar in **MS Outlook** to do all actions.

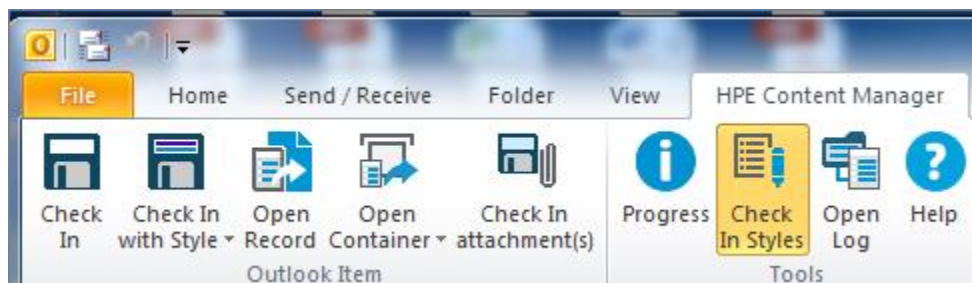


If you don't see the Toolbar in Outlook, go to **EDRMS Content Manager**, File, Desktop Add Ins. Ensure that MS Outlook is selected, and select **OK**.



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Return to [MS Outlook](#); here's an overview to help you get familiar with the toolbar.



Use **Check In** when you have a single email you wish to check in.

Use **Check In with Style** when you have a group of emails you want to check in to the same folder in EDRMS Content Manager.

Use **Open Record** when you want to quickly view an email that you've recently added to EDRMS Content Manager.

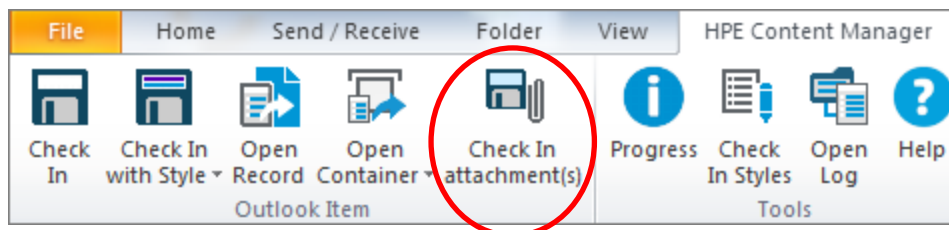
Use **Open Container** when you want to open a folder in EDRMS Content Manager where an email has been checked in.

Use **Progress** when you want to view the Progress bar at the bottom of your Outlook screen. You can decide if you like to see this at the bottom of your Outlook screen, or hide it. The processing window appears at the bottom each time you check in. You may wish to close this window after the item is checked in.

Check In Attachment(s) Only

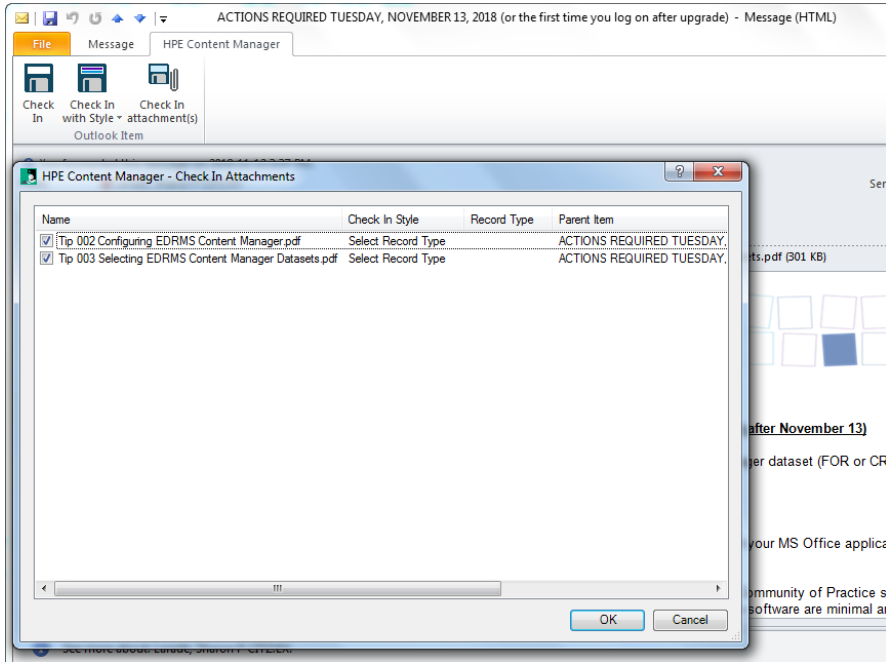
You can also check in [just the attachment\(s\)](#) from an email. To do this:

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

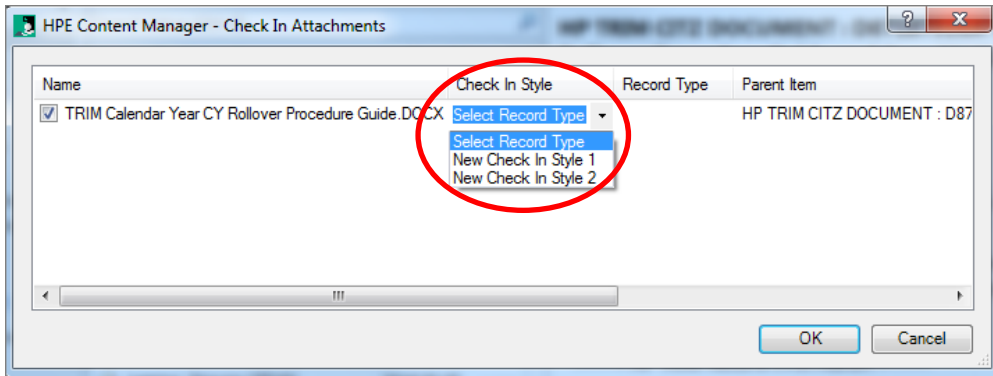


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You will automatically be prompted with a window from **EDRMS Content Manager**. It will list each attachment separately, pulling the exact title of the attached document into the table below.

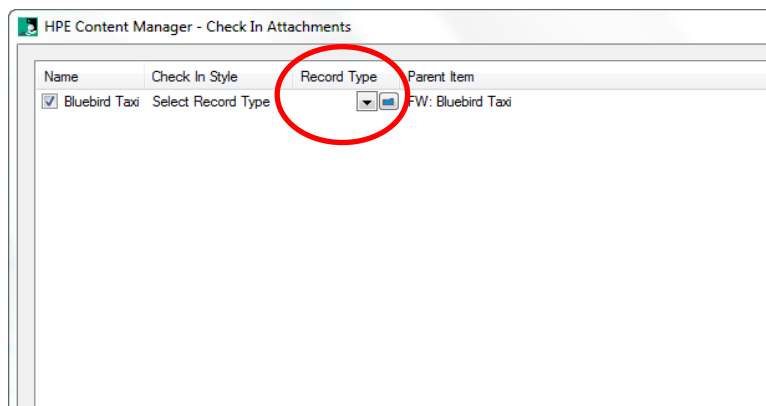


3. On the **Check In Attachments** popup:
 - a. Select one of your Check In Styles from the **Check In Style** dropdown.



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- b. If you don't have a Check in Style displayed, move to the next column on the right called **Record Type**. **This column will appear blank** but there is data hiding. Select in this blank space until you see content, either a record type or a blue folder.



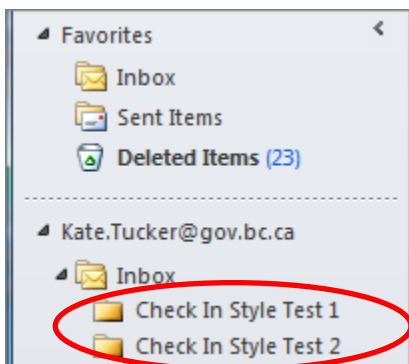
- c. Select your Record Type from the drop down list or search for your record type at the blue folder link. Click **OK**.

Only the attachment(s) will be checked in as defined by the Check In Style. The email itself will not be checked in.

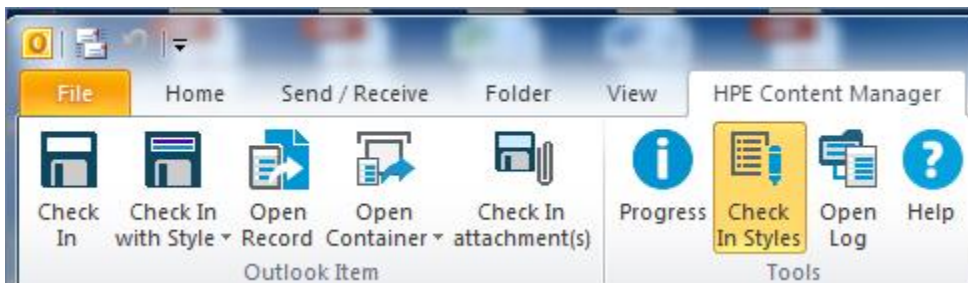
Create a Check In Style in MS Outlook

1. Create new folders under your Inbox to link to your new EDRMS Content Manager Check In Styles. You can name these folders anyway you like.

Move the emails that you want checked-in to EDRMS Content Manager into these folders.



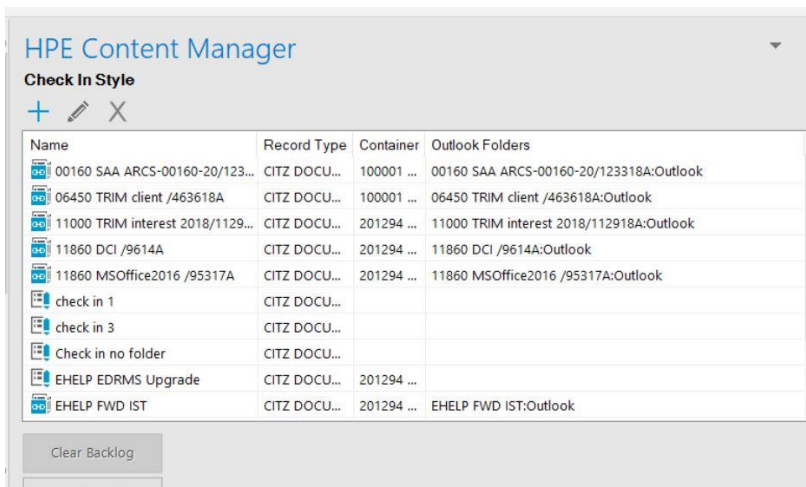
2. On the EDRMS Content Manager Ribbon, select **Check In Styles**.



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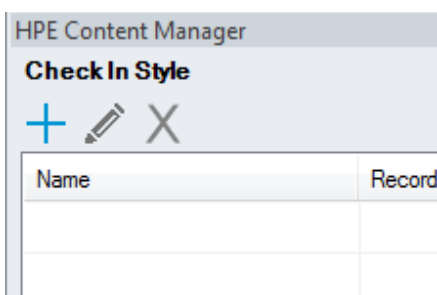
The **HPE Content Manager Check In Style** tab will be displayed to the right of your Outlook tabs.

If you previously had linked Outlook folders in TRIM, you may see a list of existing Check In Styles listed.



Name	Record Type	Container	Outlook Folders
00160 SAA ARCS-00160-20/123...	CITZ DOCU...	100001 ...	00160 SAA ARCS-00160-20/123318A:Outlook
06450 TRIM client /463618A	CITZ DOCU...	100001 ...	06450 TRIM client /463618A:Outlook
11000 TRIM interest 2018/1129...	CITZ DOCU...	201294 ...	11000 TRIM interest 2018/112918A:Outlook
11860 DCI /9614A	CITZ DOCU...	201294 ...	11860 DCI /9614A:Outlook
11860 MSOffice2016 /95317A	CITZ DOCU...	201294 ...	11860 MSOffice2016 /95317A:Outlook
check in 1	CITZ DOCU...		
check in 3	CITZ DOCU...		
Check in no folder	CITZ DOCU...		
EHELP EDRMS Upgrade	CITZ DOCU...	201294 ...	
EHELP FWD IST	CITZ DOCU...	201294 ...	EHELP FWD IST:Outlook

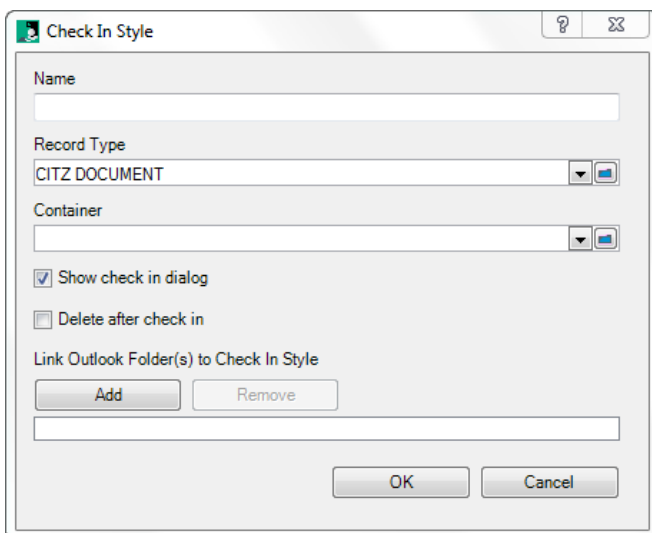
To **Create a new Check In Style**, select the **+** sign



HPE Content Manager
Check In Style
+ ✎ ✕

Name	Record

Complete this form for each Check In Style you wish to create, choosing your own Record Type. You can have as many Check In Styles as you need.



Check In Style

Name
Record Type
CITZ DOCUMENT

Container

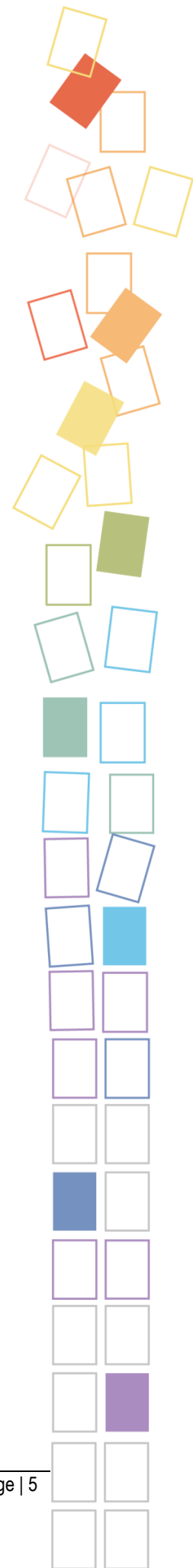
Show check in dialog
 Delete after check in

Link Outlook Folder(s) to Check In Style
Add Remove

OK Cancel

If you want to be prompted with a check in form for each email, select **Show check in dialog**. This option allows you to edit the title of an email more accurately as it is being checked in.

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



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If you'd prefer to delete all emails from Outlook after they are checked in to EDRMS Content Manager, select **Delete after check in**. This is a recommended best practice.

Check In Style

Name
New Check In Style 1

Record Type
CITZ DOCUMENT

Container
201294 - RECORDS MANAGEMENT SERVICES: LIAISON AND ADVICE - Sit

Show check in dialog

Delete after check in

Link Outlook Folder(s) to Check In Style

Add Remove

Check In Style Test.Default Outlook Profile

OK Cancel

Once you have created Check In Styles, you will see a list of them. You can name your Check In Styles anything you'd prefer. You can change the order of the columns and the width of each column, but you cannot change what displays in this list of Check In Styles. The Container column displays the structured title as well as the Title Free Text Part only. You can navigate from left to right using the slider at the bottom of the screen.

HPE Content Manager


Check In Style

Name	Container	Outlook Folders	Record Type
Check In 3	201294 - RECORDS MANAGEMEN...	Check In 3:Default Outlook Profile	CITZ DOCUMENT
New Check in Style 1	100001 - ADMINISTRATION: GEN...	Check In Style 1:Default Outlook Profile	CITZ DOCUMENT
New Check In Style 2	100001 - JOB DESCRIPTION AND...	Check In Style 2:Default Outlook Profile	CITZ DOCUMENT
SPL1	100001 - ADMINISTRATION: GEN...	00105 CM9 linked:Default Outlook Profile	CITZ DOCUMENT

Clear Backlog

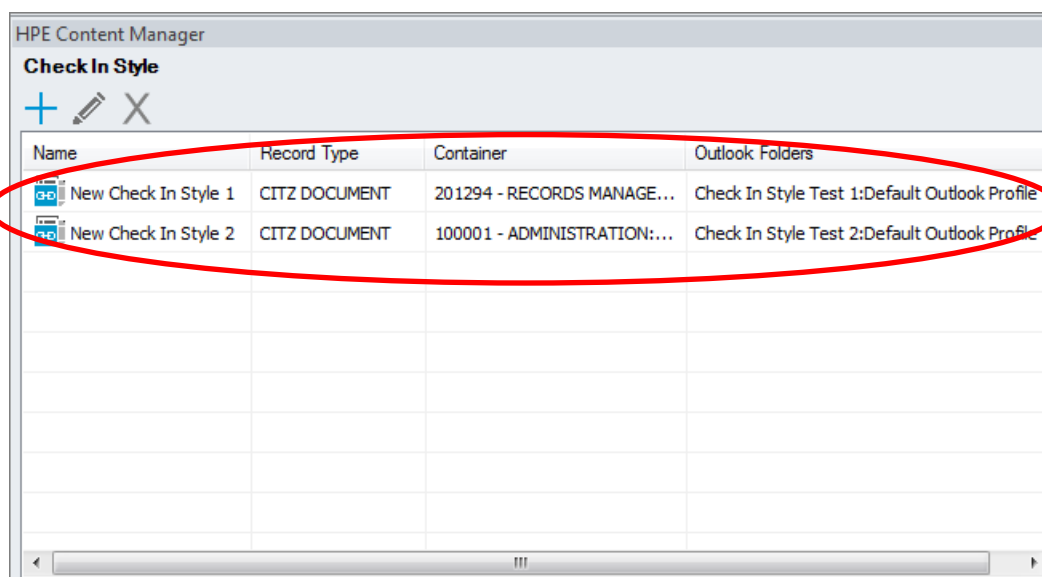
Clear All Backlogs

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3. You now need to link the **Check In Styles** to the Outlook Folders you have created. To do this:
 - a. Select the new **Check In Style** from the list.
 - b. Select the pencil icon at the top of the list to edit the style. 
 - c. On the **Check In Style** popup:
 - Check **Delete after Check in**. This will delete the email from Outlook once it has been moved to EDRMS Content Manager, and is **recommended as best practice**.
 - 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.

If you extend your **Check In Style** window or scroll to the right, you will see the settings you defined for each style, including the Record Type and destination container.



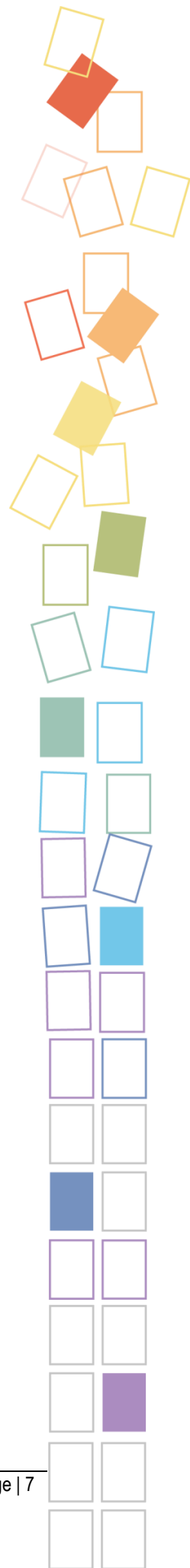
Name	Record Type	Container	Outlook Folders
New Check In Style 1	CITZ DOCUMENT	201294 - RECORDS MANAGE...	Check In Style Test 1:Default Outlook Profile
New Check In Style 2	CITZ DOCUMENT	100001 - ADMINISTRATION:...	Check In Style Test 2:Default Outlook Profile

- d. **Check In sent items:** do not use this setting.

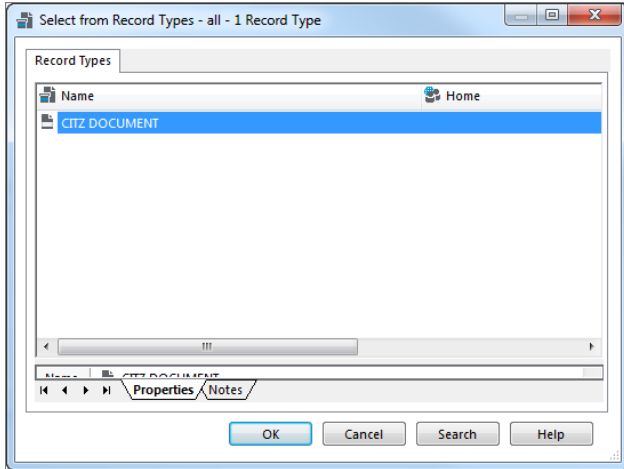
Single/Multiple Email Check In On the Fly

You can also select a single or multiple emails and select **Check In**. This allows you to check emails in to EDRMS Content Manager without having defined a Check In Style. You do however have to provide the same information for the records.

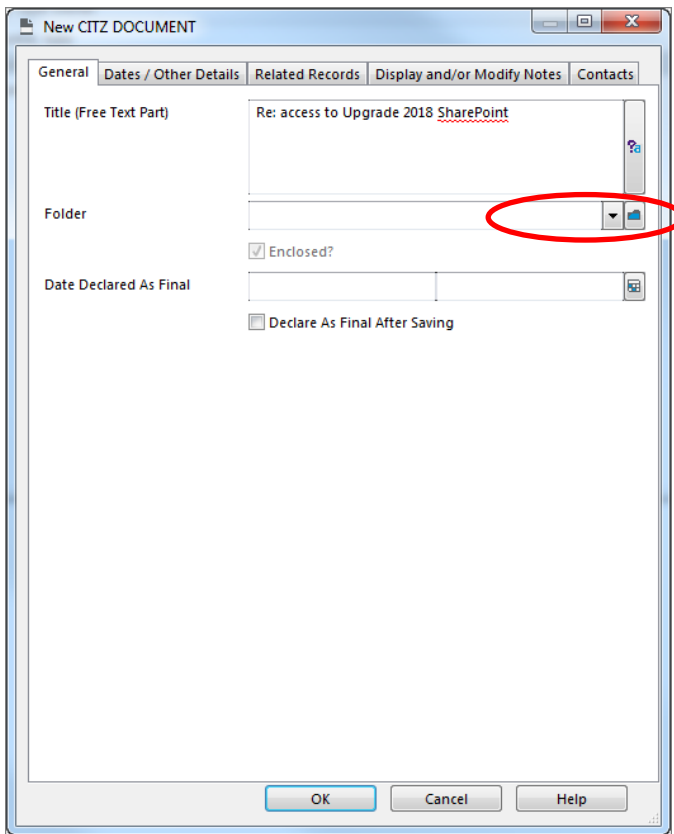
1. On the **Select from Record Types** popup, select the record type.
2. Click **OK**.



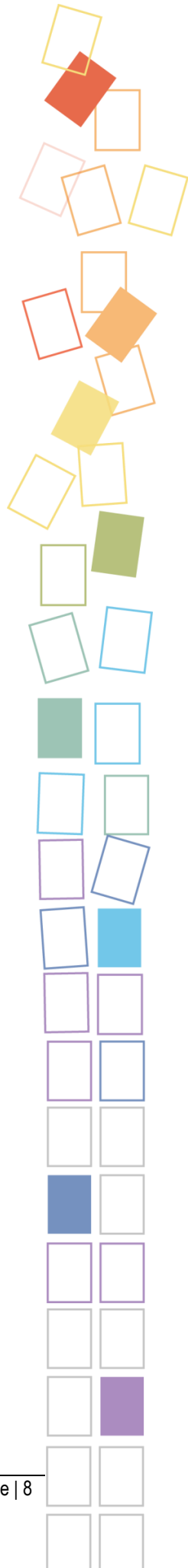
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3. On the **New (RECORD TYPE) DOCUMENT** popup, select a destination folder from the dropdown or select the blue folder icon and search for one.



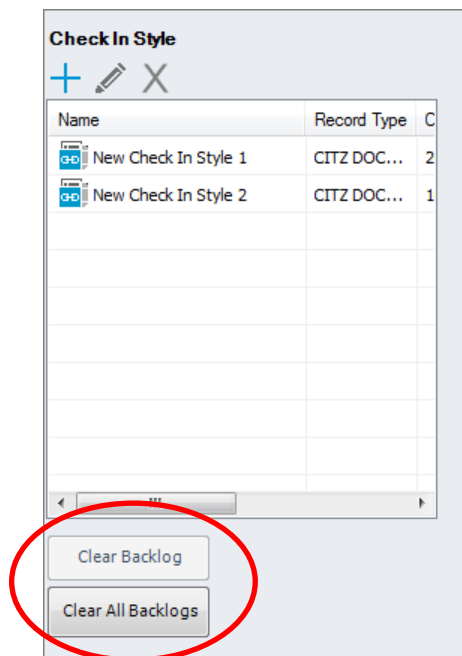
4. Click **OK**. The **New (Record Type) Document** popup will need to be completed for each new record.
5. You can also select a single email or multiple emails to file into EDRMS Content Manager instead of using a linked Outlook folder. Select **Select Record Type** or a **Check In Style** from the dropdown.
 - a. If you select **Select Record Type** you will need to follow the process outlined above.
 - b. If you select a **Check In Style** it will be applied to the emails as they are checked in.



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About Linked Folders

- ◆ When moving a large number of 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, select **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 Backlog** should be selected if you wish to clear unprocessed items from a single specific Outlook folder linked with a Check In Style. **We recommend this as a best practice.**
- ◆ **Clear All Backlogs** should only be selected if you wish to clear unprocessed items from all of your Outlook folders linked with all of your Check In Styles linked to EDRMS Content Manager. **Please exercise caution.**
- ◆ You cannot 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.
- ◆ If sending items to EDRMS Content Manager from Outlook is interrupted, the next time Outlook starts a **Content Manager - Check In Sent Items** popup will be displayed, with a list of emails to be sent according to its configured options from **Check In Style** and **Record Type**.

Always remember to **remove 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 relinkage when you next want to clear the backlog.

