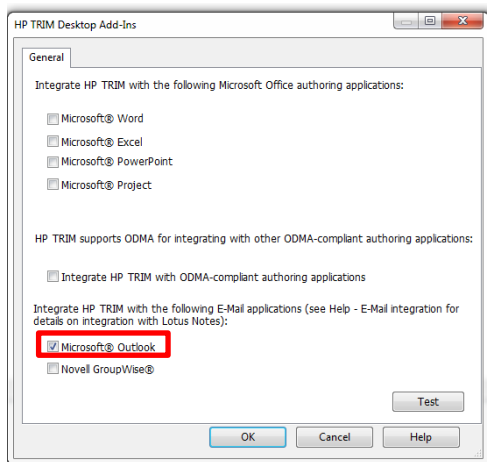


1. Setup Guide

Note: HP Records Manager 8 (RM8) must be installed on your PC before you can enable the Outlook Add-In buttons.

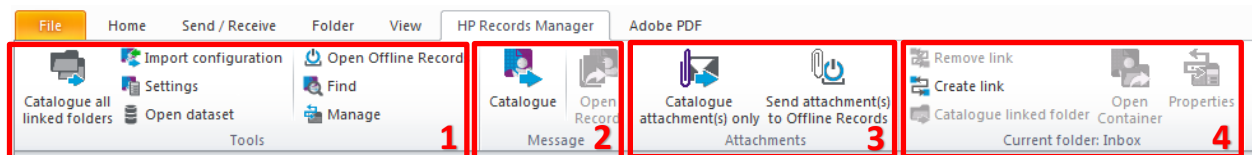
- 1.1 After RM8 has been installed on your PC. Open RM8 and click **Tools > Desktop Add-Ins...**
- 1.2 Ensure the following options are ticked. (See screenshot below)



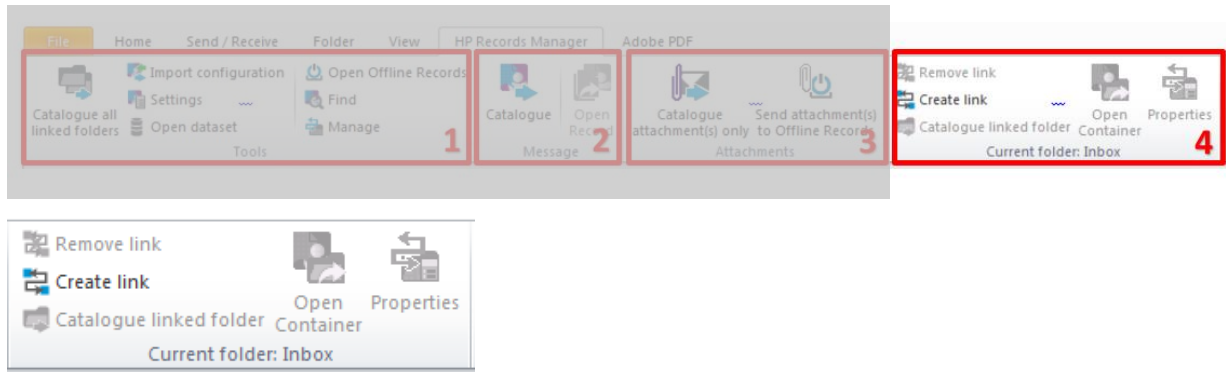
- 1.3 Ensure the 'Microsoft Outlook' box is ticked and click ok
- 1.4 Open Microsoft Outlook and look for the 'HP Records Manager tab'

2. Overview of the HP Records Manager Tab & Outlook Add-Ins buttons

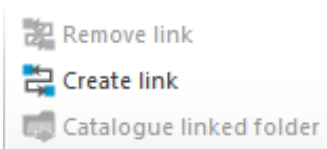
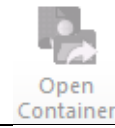

The HP Records Manager Outlook Add-In buttons enables you to catalogue emails and attachments into RM8. These buttons allow you to catalogue one off or individual emails into specific folders or map outlook folders to specific files in RM8 for regular filing. The Outlook Add-In buttons can be divided up into four sections as seen below.



3.4 Section 4 - 'Current Folder:'

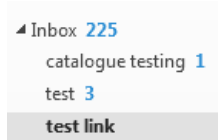


This section allows a user to create and manage the properties of a linked folder (within outlook) that has been selected.

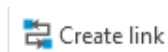
	Button Title & Icon	Summary of Function
a.		<ul style="list-style-type: none"> i. Removes the link between the selected outlook folder and the record within RM8. ii. Creates a link between the selected outlook folder and a record within RM8. iii. Catalogues any emails that may already be within an outlook folder before a link with RM8 was created. (Note: Not available for the Sent Items folder)
b.		<ul style="list-style-type: none"> i. Opens the selected linked folder's set container within RM8.
c.		<ul style="list-style-type: none"> i. View and modify the selected linked folder's properties (See section 4. for further details on creating and modifying a linked folder)

3. Creating and Modifying a Linked Folder within Outlook

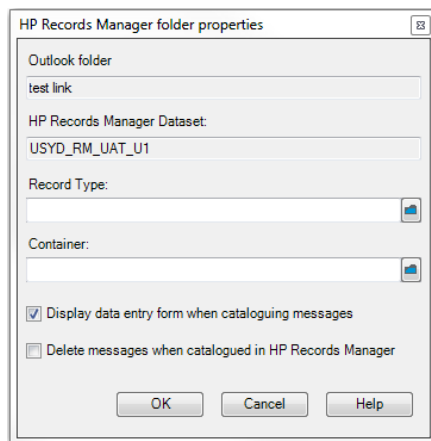
4.1 Select a new or existing outlook folder to link with RM8. (e.g, 'test link' as seen below)



4.2 With the folder highlighted, click the 'create link' button within the HP Records Manager toolbar.



4.3 The setting window will open as seen below

A dialog box titled 'HP Records Manager folder properties'. It contains the following fields and options:

- Outlook folder: test link
- HP Records Manager Dataset: USYD_RM_UAT_U1
- Record Type: (empty text box)
- Container: (empty text box)
- Display data entry form when cataloguing messages
- Delete messages when catalogued in HP Records Manager

At the bottom are buttons for 'OK', 'Cancel', and 'Help'.

4.4 Within the Record Type text box, enter 'document'

4.5 Within the Container text box, enter the record number of the file you wish to link to

4.6 Click Ok – the link has now been created. You can edit this link further with the Manage button.



Definitions:

Record Type - the Record Type HP Records Manager should use as default, when cataloguing emails from the linked folder

Container - the container HP Records Manager should use when cataloguing emails from the linked folder

Display data entry form when cataloguing messages - select to show the New Record form when processing email, (this enables you to enter further details for the email)

Delete messages when catalogued in HP Records Manager - select to delete the email from the mail folder once it has been catalogued into HP Records Manager

Note: If you wish to modify these folder in the future, click the 'properties' button within the HP Records Manager toolbar





4. Trouble Shooting

5.1 If you are having trouble mapping any of you outlook folders or with the setup and installation of the Records Manager Outlook buttons, please don't hesitate to contact the Records Online Helpdesk on Ph 9036 9537 or recordsonline@sydney.edu.au.

Appendix – TRIM 7 Buttons

TRIM 7 Buttons – Note: this is now an **old, unsupported version of TRIM**. If you still have these buttons within your version of outlook please contact Records Management Services - Ph 9036 9537 or

recordsonline@sydney.edu.au

TRIM 7 Add-In Buttons	Function
	Catalogue email including attachment
	Catalogue email attachment only
	Catalogue email message only
	Find record in TRIM
HP TRIM ▾	Options to customize HP TRIM Outlook settings