

# Records Manager 8 - Outlook Add-In User Guide

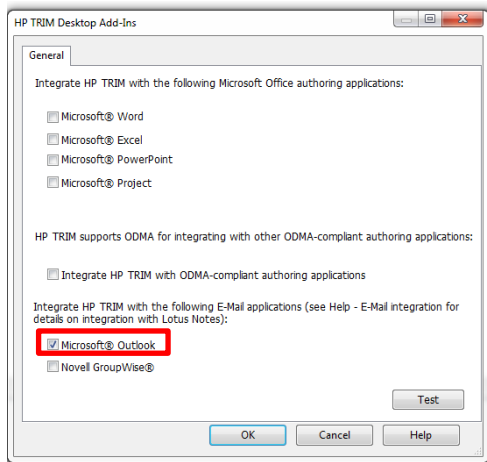
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## 1. Setup Guide

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

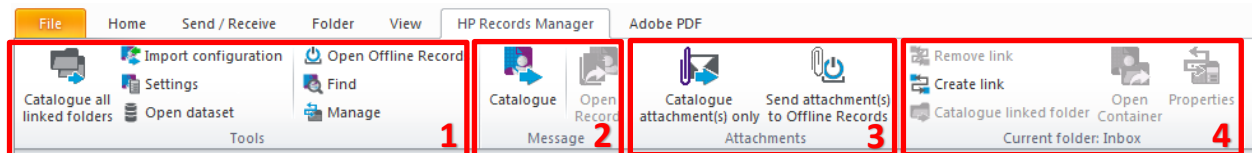
- 1.1 After RM8 has been installed on your PC. Open RM8 and click **Tools > Desktop Add-Ins...**
- 1.2 Ensure the following options are ticked. (See screenshot below)



- 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'

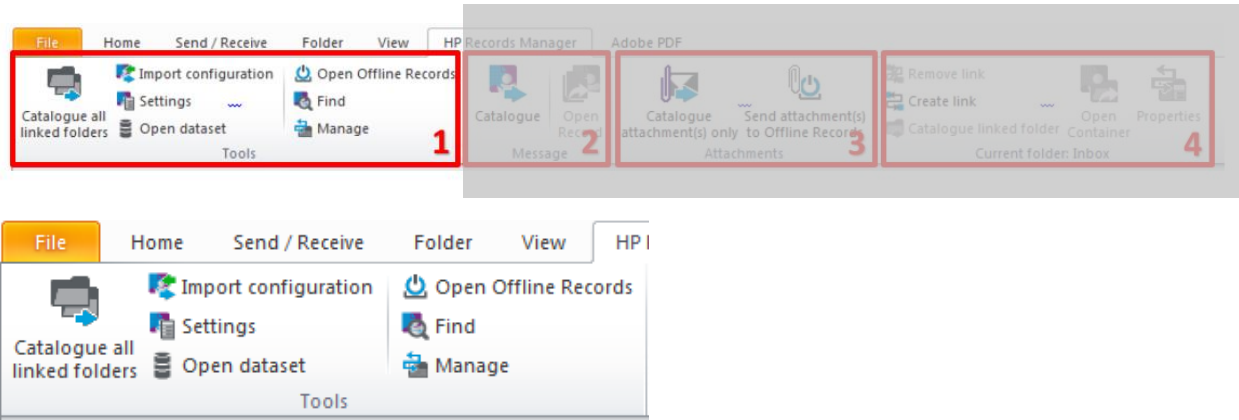
## 2. Overview of the HP Records Manager Tab & Outlook Add-Ins buttons

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.

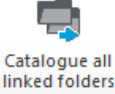

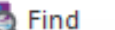
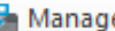


### 3. Using the HP Records Manager Outlook Add-In buttons

#### 3.1 Section 1 – ‘Tools’

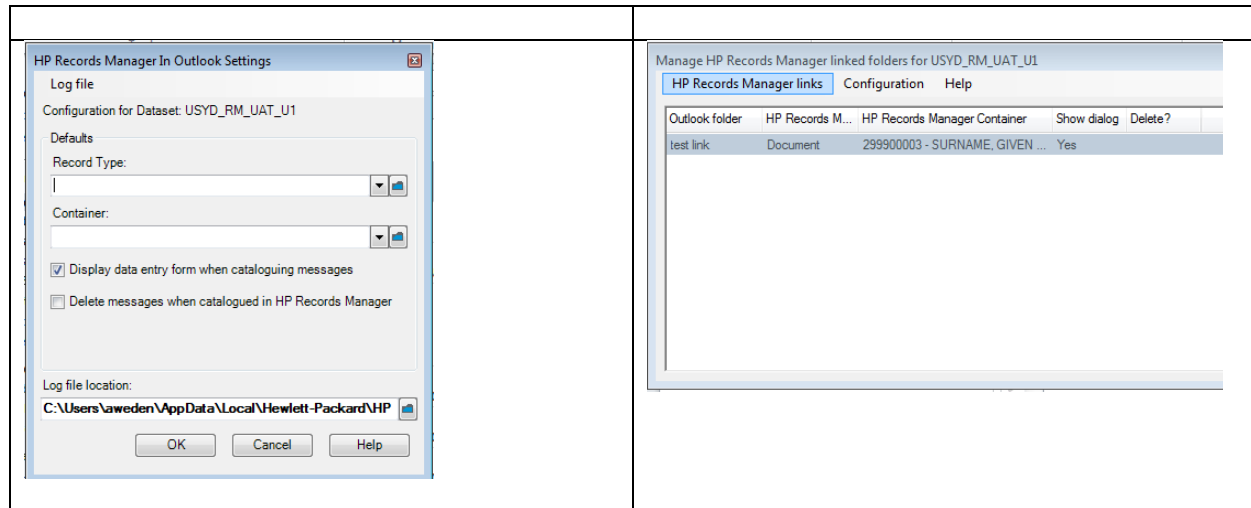


This section is responsible for customizing settings for the HP Records Manager Outlook-Add In buttons in addition to searching for records within HP Records Manager

	Button Title & Icon	Summary of Function
a.	 Catalogue all linked folders	i. Catalogues the current backlog of items from all linked folders
b.	 Settings	i. Opens up the HP Records Manager Outlook settings (See below). The settings window allows you to customize and specify how you would like emails to be catalogued into RM8. E.g Default Record Type, Record Container etc.
c.	 Find   Manage	i. Locate records within RM8 for E-filing or for folder mapping.  ii. Shows the folders within Outlook that are currently mapped to a record with RM8. (See below)

(b.i.) the settings window

(c.ii.) the manage window



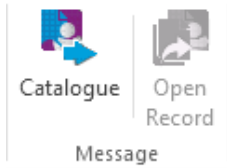
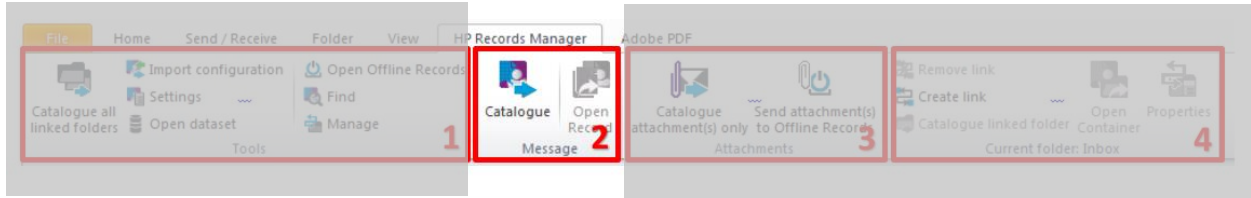
## Definitions:

**Defaults - Record Type** - the Record Type Records Manager uses by default for new email records



**Defaults - Container** - the container Records Manager uses by default for new email records **Display data entry form when cataloging messages** - select to always display a form that users have to complete manually when checking in new email records

**Delete messages when cataloged in HP Records Manager** - select to delete the messages from Outlook when they have been checked in to Records Manager

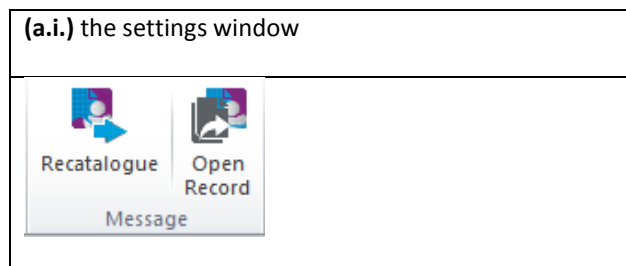
### 3.2 Section 2 – ‘Message’



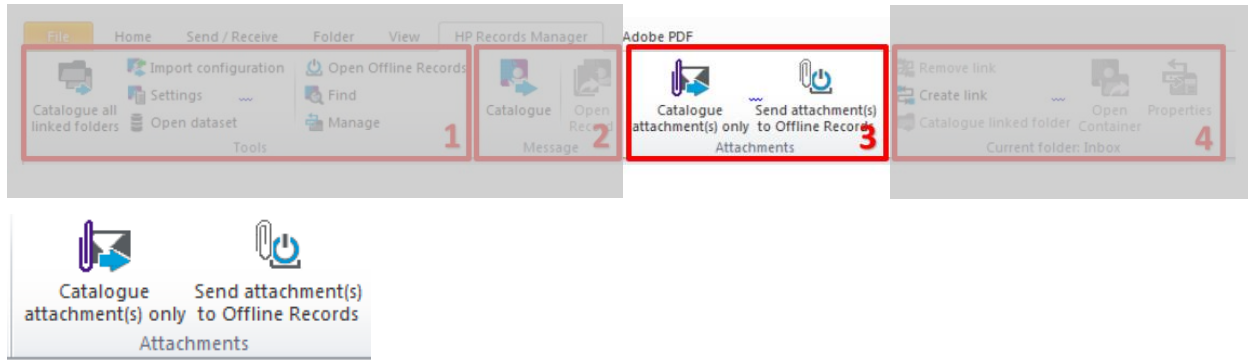
This section allows a user to catalogue emails (including any attachments) into RM8.

	Button Title & Icon	Summary of Function
a.	 Catalogue	i. Catalogues emails (including attachments) into RM8.
b.	 Open Record	i. Opens the record of the email/document that has just been cataloged into RM8  <b>Note:</b> Once an email has been catalogued into RM8, this button will become active (the colour will change from grey to coloured)



**Note:** When you have catalogued an email into HP Records Manager, the ‘Catalogue’ button will change to ‘Recatalogue’, allowing you to save the email into multiple files.



### 3.3 Section 3 - 'Attachments'



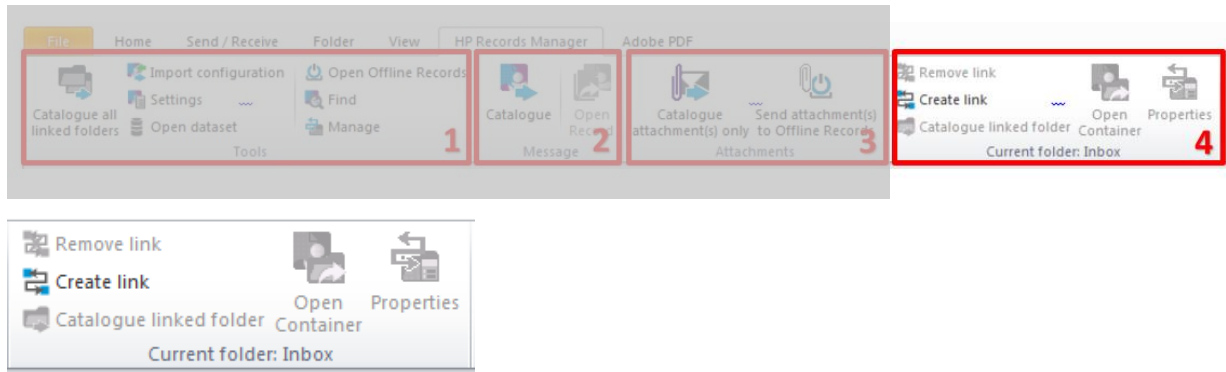
This section allows a user to catalogue email attachments into HP Records Manager or to save emails/documents into Records Manager's Offline Records.

	Button Title & Icon	Summary of Function
a.	 Catalogue attachment(s) only	i. Catalogue only email attachments into RM8.
b.	 Send attachment(s) to Offline Records	i. Send the selected email's attachments to your Offline Records. <b>(it is not recommended that users use this functionality)</b>

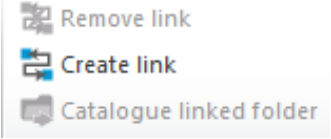
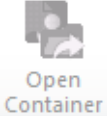

#### Definitions:

**Offline Records** - Offline Records is an HP Records Manager tray where records or draft documents can be stored and edited without changes being committed to the corporate HP Records Manager database, until the user checks in the document. Offline Records documents and records are stored on the user's computer and can be edited even when there is no connection to the HP Records Manager database. **(it is not recommended that users use this functionality)**

### 3.4 Section 4 - 'Current Folder:'

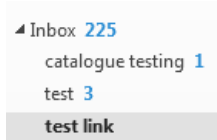


This section allows a user to create and manage the properties of a linked folder (within outlook) that has been selected.

	Button Title & Icon	Summary of Function
a.		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 <b>Sent Items</b> folder)
b.		i. Opens the selected linked folder's set container within RM8.
c.		i. View and modify the selected linked folder's properties (See section 4. for further details on creating and modifying a linked folder)

## 4. Creating and Modifying a Linked Folder within Outlook

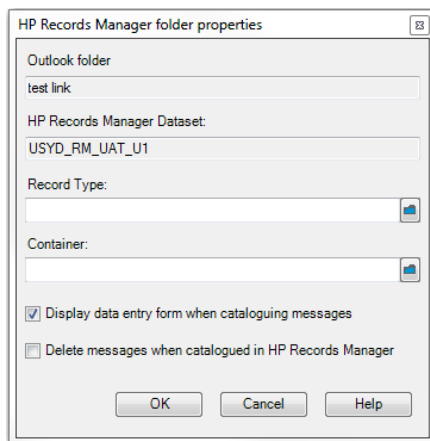
4.1 Select a new or existing outlook folder to link with RM8. (e.g, 'test link' as seen below)



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



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

## 5. 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](mailto: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](mailto: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