USING THE TRIM OUTLOOK ADD-IN TO UPLOAD EMAILS TO RECORDS ONLINE/TRIM

If the Alpha West TRIM Outlook Add-In is not installed on your computer, install it by following these steps:

1. **Register as a Records User** (if not currently a user). Once registration is complete (normally within 48 hours), you will receive notification that your Unikey has now been set-up to access Records Online.
2. **Log-in to Records Online**
3. Click **Support → Outlook Add-In Help → Download the Outlook Addin Installer**
4. After installing the Alpha West TRIM Outlook Add-In, the following **Login** box will appear when Outlook is opened:

   ![Login Box Image]

   In the **User Name** field, type your **Unikey**
   Type your Unikey password
   Check **Remember my password** if you want to retain this information for each time Outlook is opened
   Click **OK**

The following toolbar will then appear in your Outlook window

*Note: In Outlook 2010, it may be present within the **Add-Ins** tab*
REGISTRATION EMAILS

In Outlook, highlight the email(s) to be saved into a single Records Online folder.

Click the Register Email button

A Register Email box will appear.

In the Records Online Folder No. field, enter the record number of the folder to which the email is being saved. If the record number is not known, click Search to bring up a search box (See section below)

The Title is taken from the email subject line. This can be edited as required

Check Include Attachment/s to also register any attachments with the email

Click OK

SEARCHING FOR A RECORDS ONLINE FOLDER NO.

If you are unsure of the Records Online Folder No. (e.g. the SID of a student) click the Search button

A Search box will appear

In the Search By Word field, select Title Word from the drop-down menu

Enter your search term (e.g. A student’s last name)

Click Search

Results will then appear in the results field

Select the appropriate folder and click OK

Searches can also be performed by Creator and Date Range along with other fields

If you need to create a new folder, click New Folder to launch Records Online
LINKING AN OUTLOOK FOLDER TO A RECORDS ONLINE FOLDER

This function allows the user to automatically register emails to a Records Online folder as they are moved into an Outlook folder.

Highlight the folder in Outlook.

In the Add-In toolbar click **Settings ➔ Current Folder: … ➔ Map Folder**.

A **Mapped Folder Properties** box will appear.

In the **Records Online Folder No.** field, enter the Record Number of the folder to which the emails will be saved.

In the record number is not known, click the **Search** button to bring up a Search box.

Click **OK**.

As emails are dragged into this folder from the inbox, they will now automatically be saved into the Records Online folder specified.