

# Registering emails from Outlook

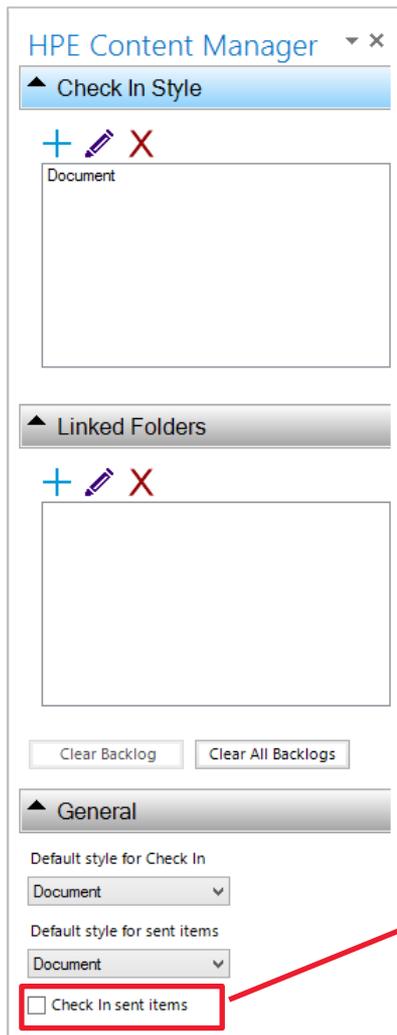
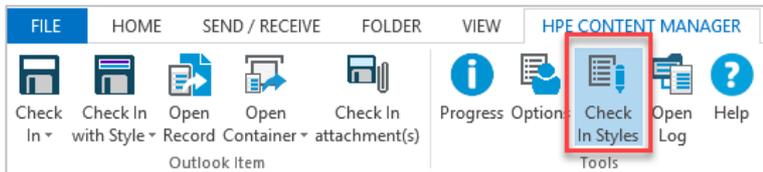
## Introduction

Once integrated with Microsoft Outlook, Outlook will display a 'HPE Content Manager' tab in the ribbon. You can use this integration to quickly and easily register emails and attachments to Content Manager. To turn on HPE Content Manager Office integration, please refer to the Quick Reference Guide "How to turn on Integration with Word, Excel, Powerpoint and Outlook".

## Settings

The **first time** you use the Outlook integration, you should configure your settings. Follow the procedure below first before checking in any emails or attachments.

In Outlook, select the HPE Content Manager tab & click the **Check in Styles** button in the **Tools**



Check these settings in Microsoft Outlook that will determine how it interacts with HP ECM.

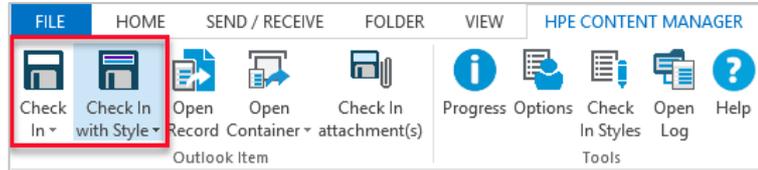
1. **Check in Style** is set to **Document** (should be set by default)
2. Under the **General** tab, set the default style for Check In as **Document** and set the Default style for sent items to **Document**

**Note:** Tick this only for **all** sent emails to be registered to Content Manager. After you send an email, the document registration form will display prompting you to check it in. Whether you complete the check in process, or cancel it, the email **will not be stored in your Outlook Sent folder**.

## Procedure

### Saving emails and attachments

1. Select the desired email in your Outlook mail folder.
2. On the HPE Content Manager tab on the Outlook ribbon, select **Check In** or **Check in with Style**.



3. The **New Document** registration form will display. Enter the document title, file number and other required details.

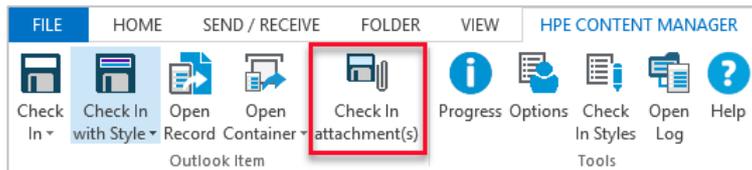
**Note:** Ensure HPE Content Manager Business Rules and naming standards are followed. Ensure unknown authors and addresses are removed or the correct contact is selected from the location table

4. Click **OK**. The email (and any attachments it has), will be registered

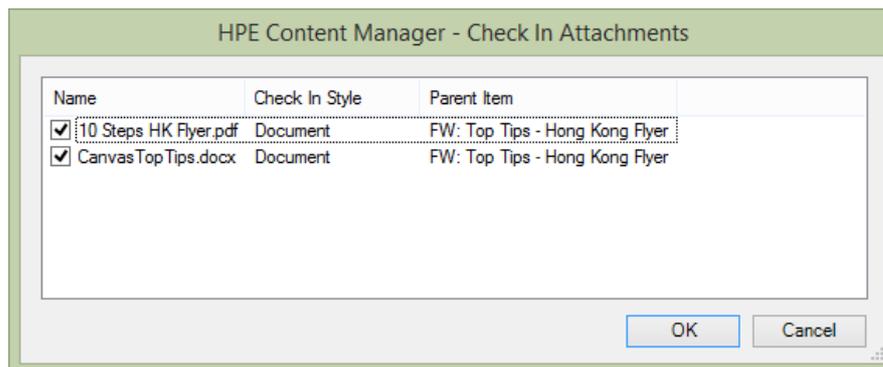
**Note:** Emails saved to Content Manager will display in Outlook with HPE CM in the subject line.

### Saving attachments only

1. To save only the attachment(s), i.e. without the email itself, first ensure that the desired email is selected in your mail folder. Then, go to the HPE Content Manager tab on the Outlook ribbon and click **Check in attachment(s)**



2. A **Check in Attachments** window will display. Select the attachments you wish to register by ticking the box. **Click OK** to proceed to check in.



3. The New Document registration form will appear. Enter the document title, file number and other required details. *Ensure HPE Content Manager Business Rules and naming standards are followed. Ensure unknown authors and addresses are removed or the correct contact is selected from the location table*

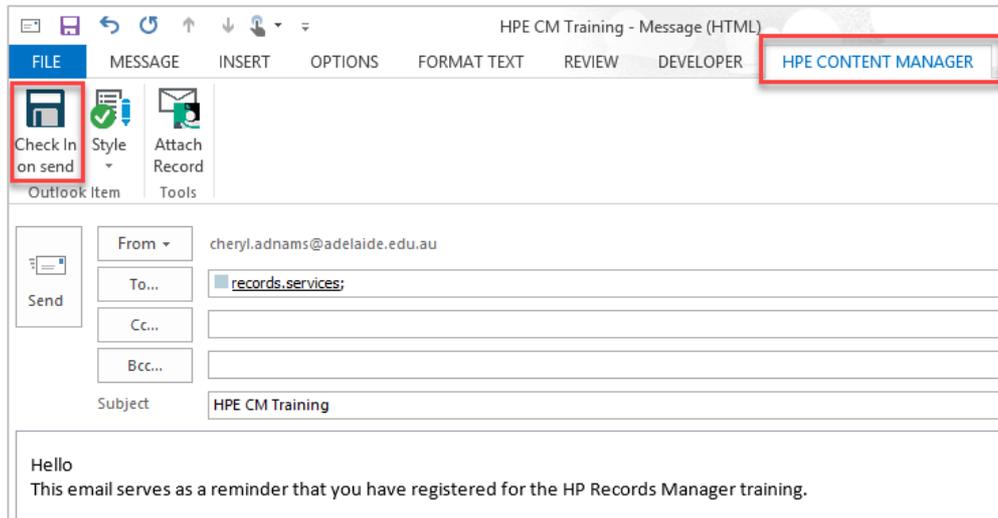
4. Click **Ok** to register the attachment in HPE CM.

**Note:** If you have selected to upload more than one attachment, once you have completed the registration on the first attachment and clicked OK, you will receive a New Document registration form for the second and consecutive attachments. Complete all document registration forms.

## Saving outgoing emails upon send

You can register an outgoing email at the same time as you send the email.

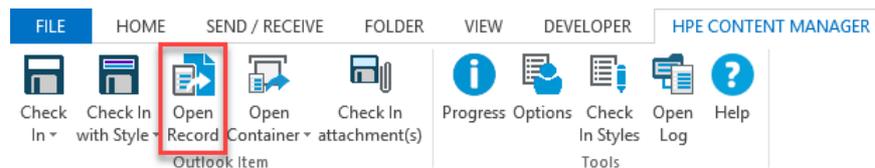
1. Write the new email you want to send.
2. In the ribbon on the email itself, click the **HPE Content Manager** tab, then select **Check In on Send** icon button
3. Click **Send** to send the email.



1. The New Document registration form will display. Enter the document title, file number and other required details. Follow all naming instructions as previously stated.
2. Click **OK**.

## Opening emails already saved in HPE Content Manager

Records of emails already registered in Content Manager can be opened from Outlook, by selecting the email in your mail folder then clicking **Open Record** from the HPE Content Manager tab.



## Contact Us

For further support or questions, please contact Records Services on **8313 5334** or [records.services@adelaide.edu.au](mailto:records.services@adelaide.edu.au)