

Creating Linked Email Folders

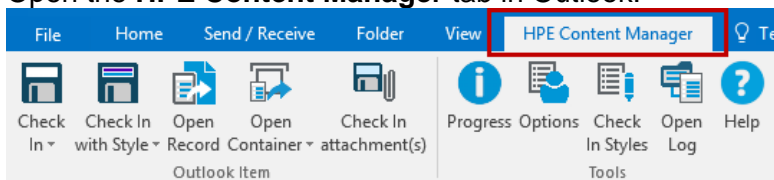
Introduction

This feature allows users to link an existing email folder in Outlook with HPE Content Manager to auto-register any emails added to this folder. The completion of the document registration form is still required.

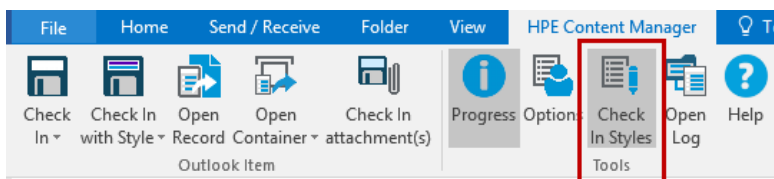
Note: Integration between MS Outlook and HPE Content Manager must be turned on. For help with integration, refer to the Quick Reference Guide titled *How to turn on Integration with Word Excel PowerPoint and Outlook*.

Procedure

1. Open the **HPE Content Manager** tab in Outlook.

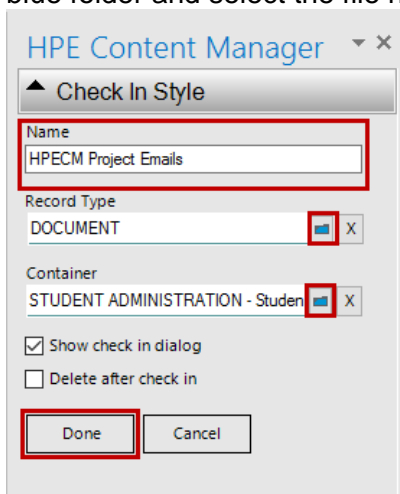


2. Click on **Check In Styles**.



The Check In Styles and Linked Folders pane opens on the right hand side of the screen.

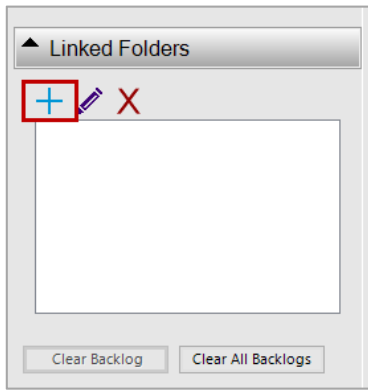
3. Click on the **+** to create a new **Check In Style**.
4. Name the Check in Style.
5. In the **Record Type** field click the blue folder and select **Document**. In the **Container** field click the blue folder and select the file number all emails will be registered to.



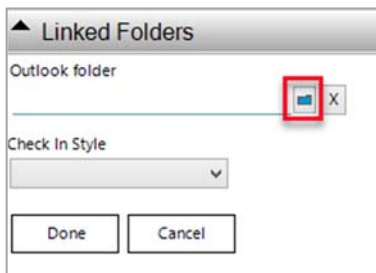
The screenshot shows the 'Check In Style' dialog box. The 'Name' field contains 'HPECM Project Emails', the 'Record Type' dropdown is set to 'DOCUMENT', and the 'Container' dropdown is set to 'STUDENT ADMINISTRATION - Studen'. The 'Done' button is highlighted in red.

6. Click **Done**.

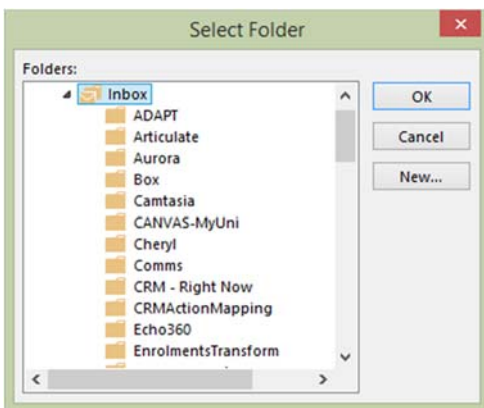
7. Click on the **+** to create a new **Linked Folder**.



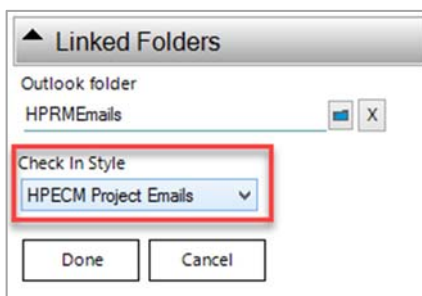
8. Click on the blue folder to select the email folder you wish to link with HPE CM.



9. Select the **Outlook folder** and click **OK**.



10. From the **Check in Style** drop down box, select the appropriate HPE Content Manager file set up to link with your Outlook folder.



11. Click **Done**.

The screenshot shows a 'New DOCUMENT' dialog box with the following fields and options:

- Title (Free Text Part):** <No Subject>
- File Number:** 2014/667
- Document Mode:** (empty)
- Document Date:** 18/07/2017 12:59:21 PM
- Document Category:** (empty)
- Author:** (empty)
- Addresssee:** (empty)
- Current Location:** <At home> 2014/667
- Electronic Only?
- Enclosed? (always tick box if electronic only)
- Declare as Final

Buttons at the bottom: OK, Cancel, Help.

12. Once the linked folder has been configured, all emails moved to the folder in Outlook will prompt you to register the same email to HPE Content Manager, and immediately display the **New Document** registration form. Complete the registration form as per business rules.

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. Remove Re, FW, special characters and punctuation.

Contact Us

For further support or questions, please contact Records Services on **8313 5334** or records.services@adelaide.edu.au