Content Manager (CM)

Creating Linked Email Folders

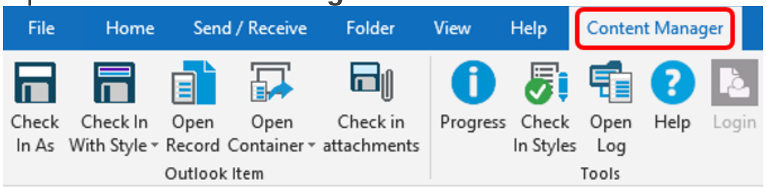
1. Introduction

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

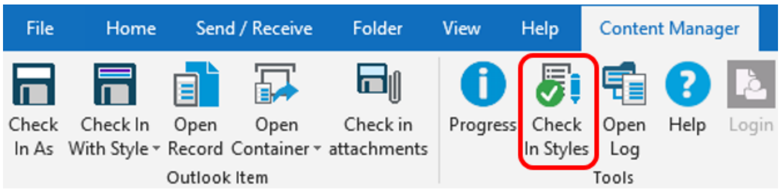
Note: Integration between MS Outlook and Content Manager must be turned on. For help with integration, refer to the Quick Reference Guide titled *How to turn on Integration with Word Excel PowerPoint and Outlook.*

2. Procedure

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


File
Home
Send / Receive
Folder
View
Help
Content Manager
Check In As
Check In With Style
Open Record
Open Container
Check in attachments
Outlook Item
Progress
Check In Styles
Open Log
Help
Login
Tools

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


File
Home
Send / Receive
Folder
View
Help
Content Manager
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Help
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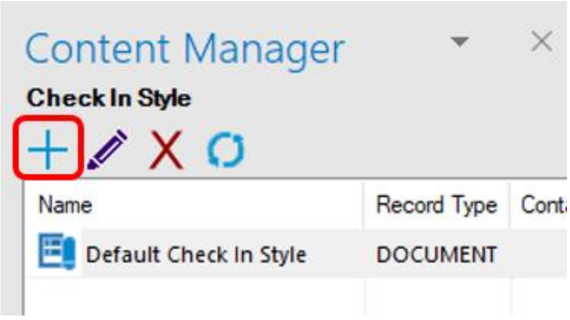
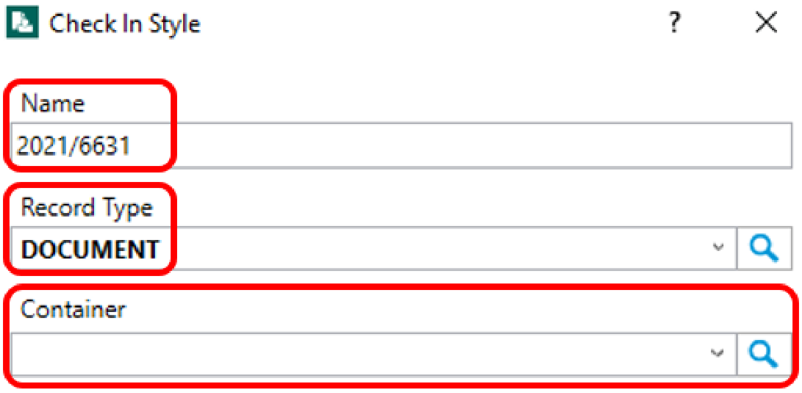
Tools

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**.


Content Manager
Check In Style
Name
Record Type
Cont
Default Check In Style
DOCUMENT

4. A new window will open. Name the Check in Style. For ‘Record Type’ select **DOCUMENT**

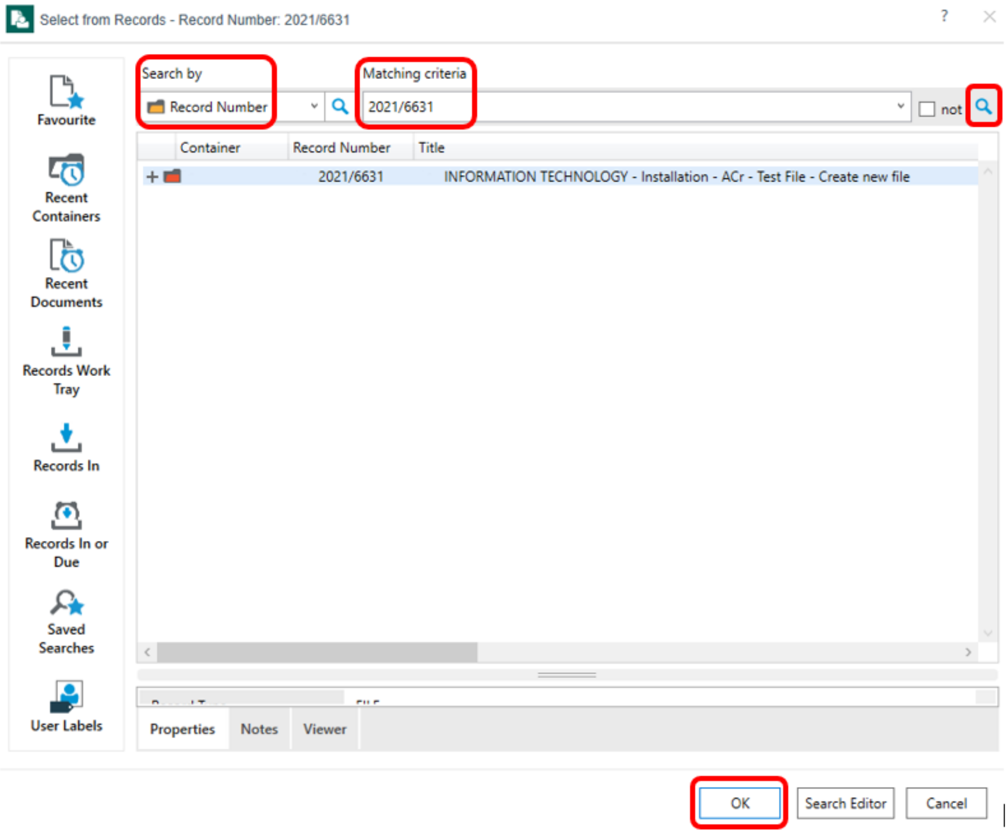

Check In Style
?

Name: 2021/6631

Record Type: DOCUMENT

Container:

5. In the **Container** field click the blue magnifying glass and another window will open. Under ‘Search By’ select ‘Record Number. Under ‘Matching Criteria’ enter file number emails are to be registered to. Click on the blue magnifying glass to the far right. Then click **OK**.


Favourite
Recent Containers
Recent Documents
Records Work Tray
Records In
Records In or Due
Saved Searches
User Labels
Properties
Notes
Viewer
OK
Search Editor
Cancel

Select from Records - Record Number: 2021/6631

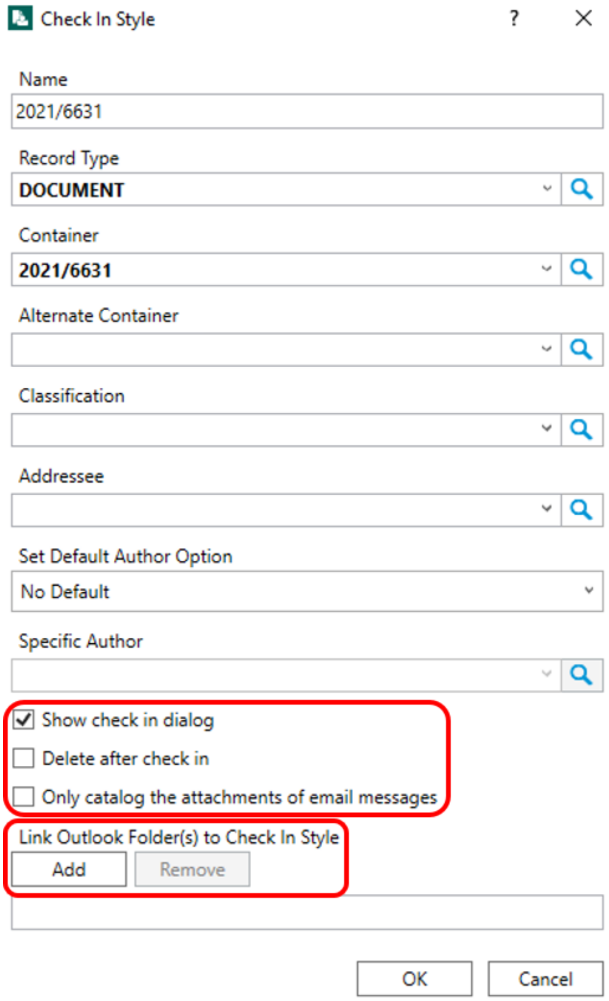
Search by: Record Number

Matching criteria: 2021/6631 ☐ not

Container	Record Number	Title
	2021/6631	INFORMATION TECHNOLOGY - Installation - ACr - Test File - Create new file

6. Click **OK.**

7. Ensure ‘Delete after check in’ and ‘Only catalog the attachments of email messages’ are unticked. Click on **Add** under the ‘Link Outlook Folder(s) to Check In Style’.



Check In Style

Name: 2021/6631

Record Type: DOCUMENT

Container: 2021/6631

Alternate Container:

Classification:

Addressee:

Set Default Author Option: No Default

Specific Author:

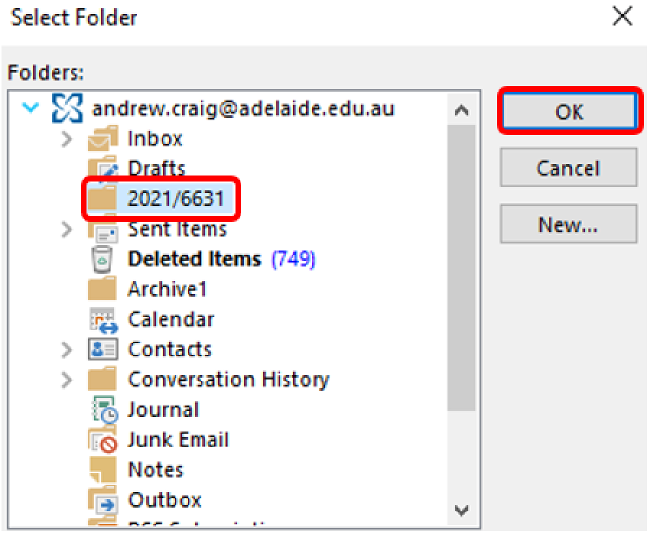
☑ Show check in dialog

☐ Delete after check in

☐ Only catalog the attachments of email messages

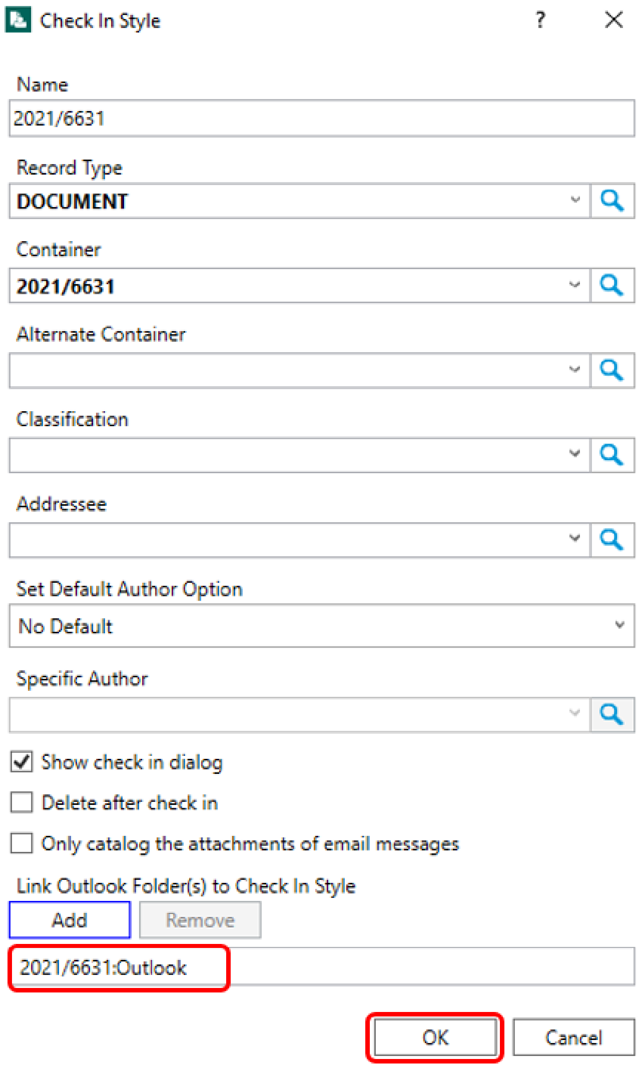
Link Outlook Folder(s) to Check In Style
Add
Remove
OK
Cancel

8. Select the **Outlook folder** and click **OK.** Create a new folder in Outlook if required. Click **OK.**



Select Folder
Folders:
andrew.craig@adelaide.edu.au
Inbox
Drafts
2021/6631
Sent Items
Deleted Items (749)
Archive1
Calendar
Contacts
Conversation History
Journal
Junk Email
Notes
Outbox
OK
Cancel
New...

9. The window should look like below. Click **OK**.



Check In Style

Name: 2021/6631

Record Type: DOCUMENT

Container: 2021/6631

Alternate Container:

Classification:

Addressee:

Set Default Author Option: No Default

Specific Author:

☑ Show check in dialog

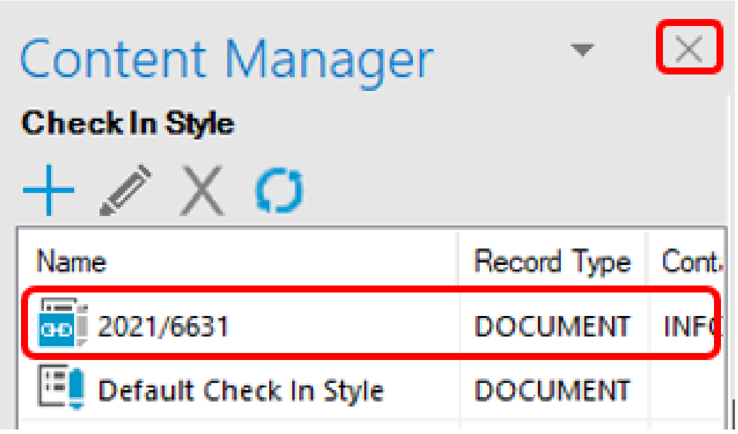
☐ Delete after check in

☐ Only catalog the attachments of email messages

Link Outlook Folder(s) to Check In Style

2021/6631:Outlook

10. The linked Outlook folder and Content Manager file should appear on the right hand side. Top close window, click on **X** in top right.

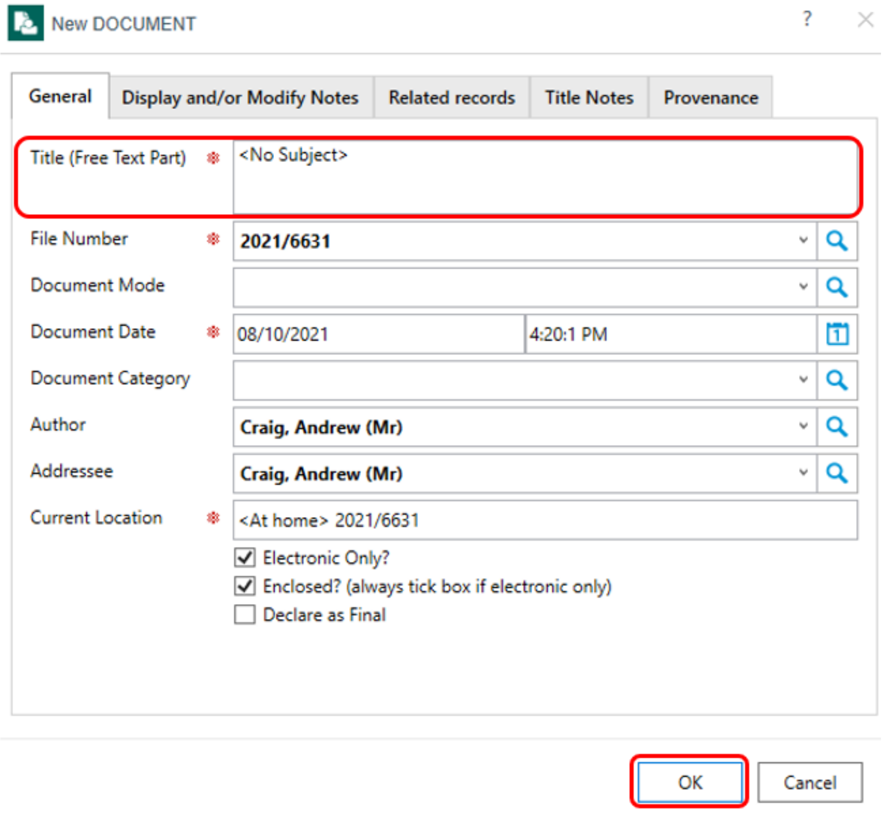


Content Manager

Check In Style

Name	Record Type	Cont.
2021/6631	DOCUMENT	INF
Default Check In Style	DOCUMENT	

11. Drag email to register to CM from Inbox to Linked Outlook folder. A New window will appear. Title document as required and click **OK**.



Title (Free Text Part): <No Subject>
File Number: 2021/6631
Document Mode:
Document Date: 08/10/2021 4:20:1 PM
Document Category:
Author: Craig, Andrew (Mr)
Addressee: Craig, Andrew (Mr)
Current Location: <At home> 2021/6631

☑ Electronic Only?
☑ Enclosed? (always tick box if electronic only)
☐ Declare as Final

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 Content Manager, and immediately display the **New Document** registration form. Complete the registration form as per business rules.

    Note: Ensure 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