

Content Manager (CM)

Share Content Using References and Email

1. Introduction

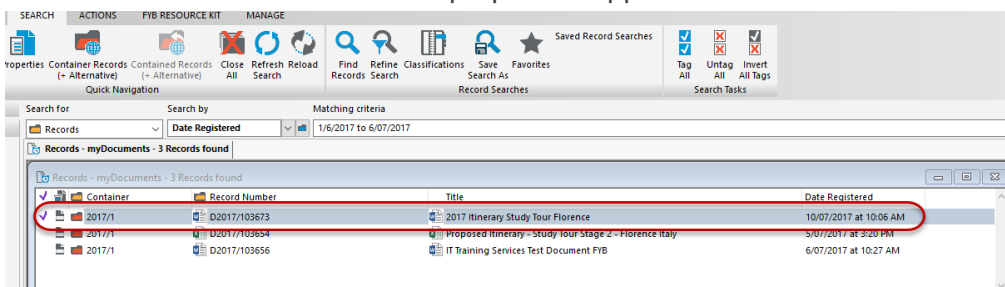
There are multiple ways to share documents and records that are saved in Content Manager. If the recipient is a Content Manager user, you can send a reference directly from Content Manager. They will click the link and open Content Manager to view the document or record. If the recipient does not have access to Content Manager, you can email them the actual document or record.

2. Procedure

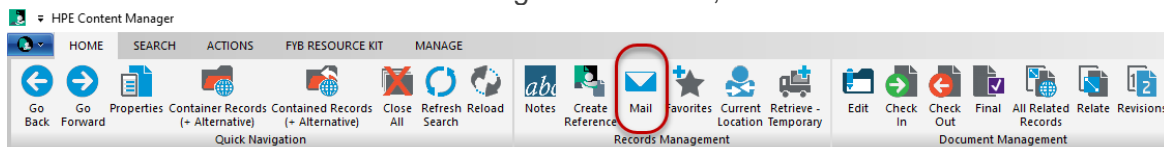
Emailing from HPE Content Manager

1. In Content Manager, select the document to be emailed.

Multiple documents can be emailed at once by tagging several documents. Tag by clicking on the far left of a document title so that the purple tick appears:



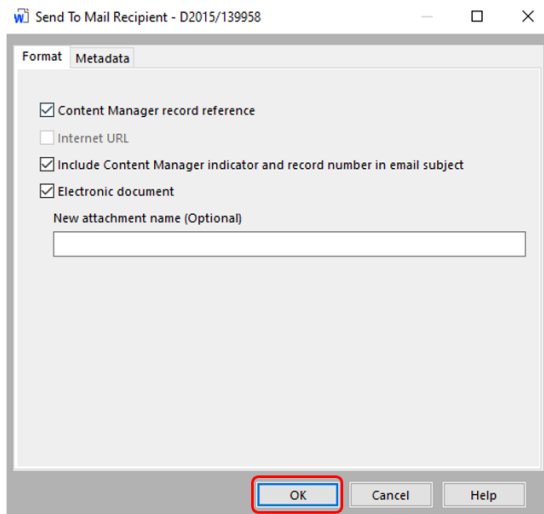
2. On the **Home** tab in the Records Management section, click **Mail**.



3. Check the desired boxes in this pop-up. Click **Content Manager record reference** to email the record reference to someone who has access to Content Manager. Click **Electronic document** to send the document itself (as an email attachment). Or, select both to email both the reference and the document.

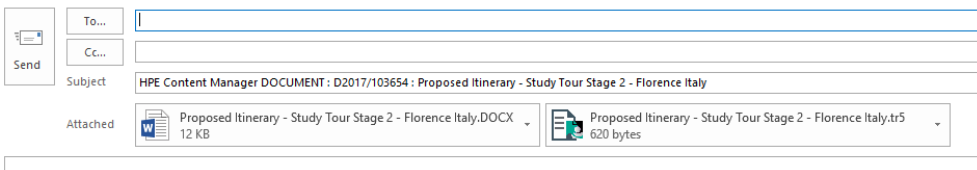
Note: The electronic document attachment can be renamed before sending.

4. Click **OK**.



In the example shown below both options have been selected, so both the Content Manager reference and the document (as an attachment) will be included in a new email. The .tr5 file attachment is the direct link to Content Manager. Content Manager users will be able to double click on the attachment and open the record directly in Content Manager. The electronic document will be emailed as the native format document (e.g. Word document, Excel spreadsheet, PowerPoint file, etc.).

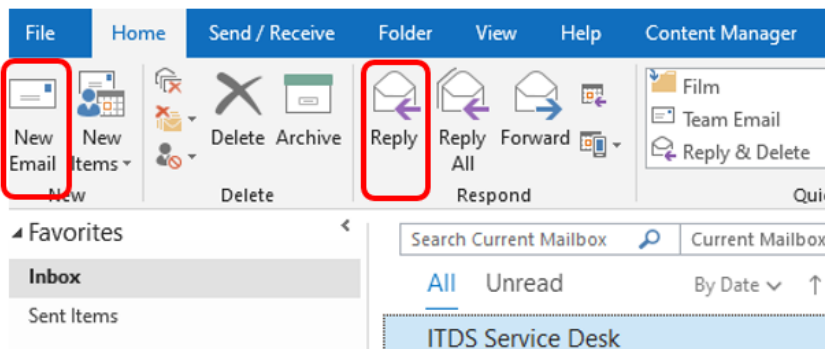
Note: Remember to insert your university signature into your email before sending.



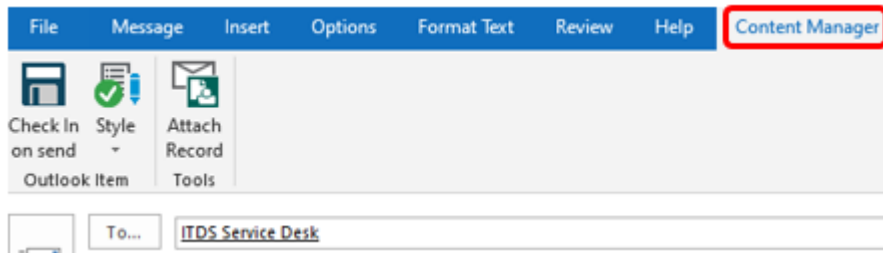
2.1.1.1. Emailing from Outlook

Note: Microsoft Integration with Content Manager must be turned on to attach Content Manager references and documents to new emails.

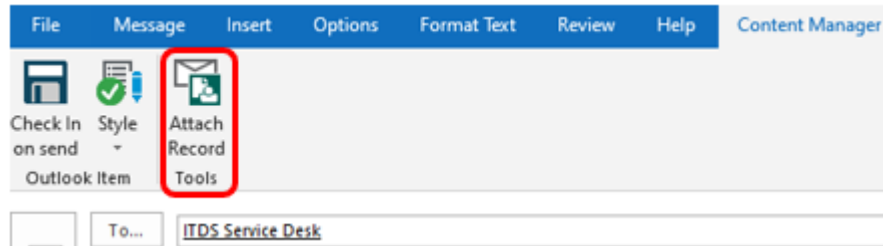
1. In Outlook, click **New** email, or **Reply** to an existing email.



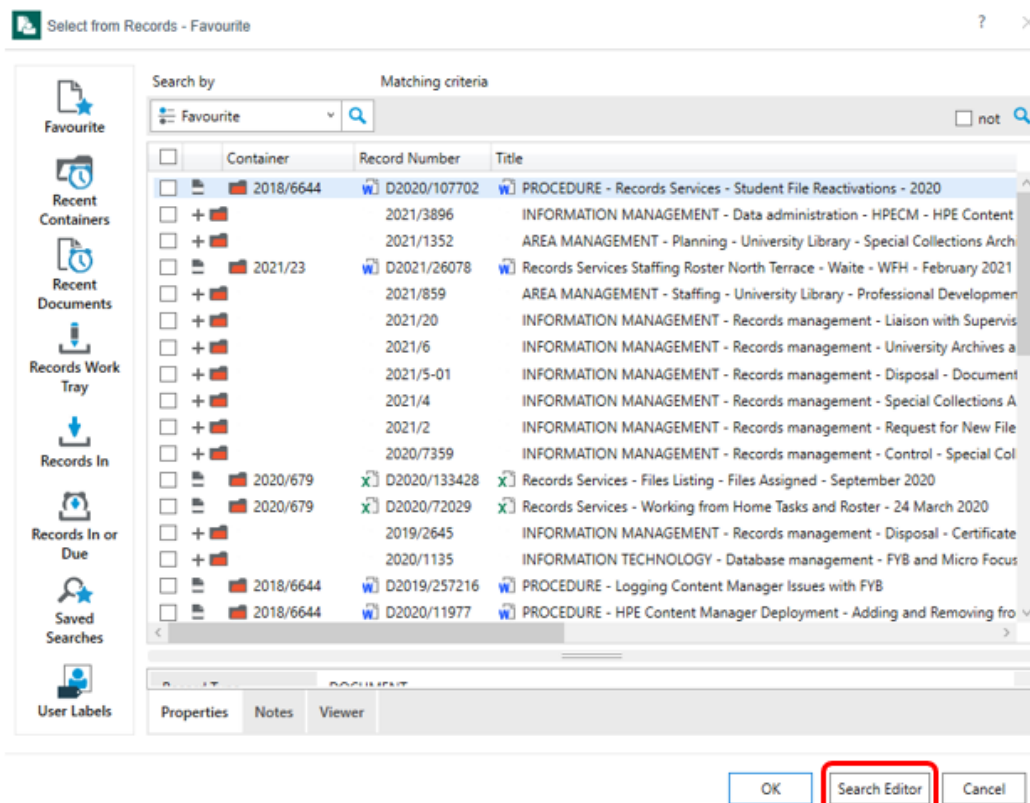
- Click **Content Manager tab** on the ribbon at the top of the email.



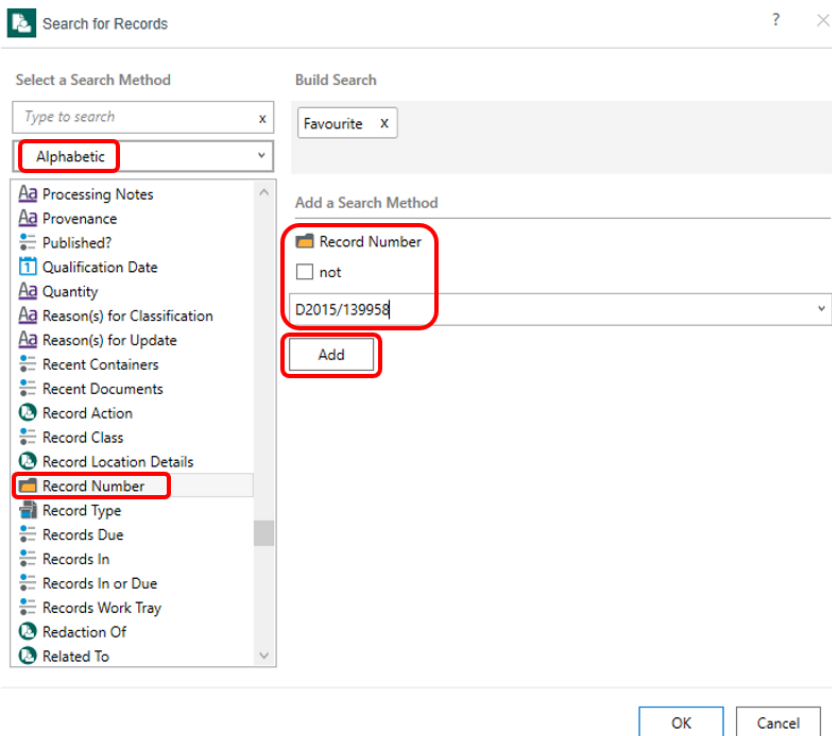
- Draft your reply or new email, then from the ribbon select **Attach Records** button.



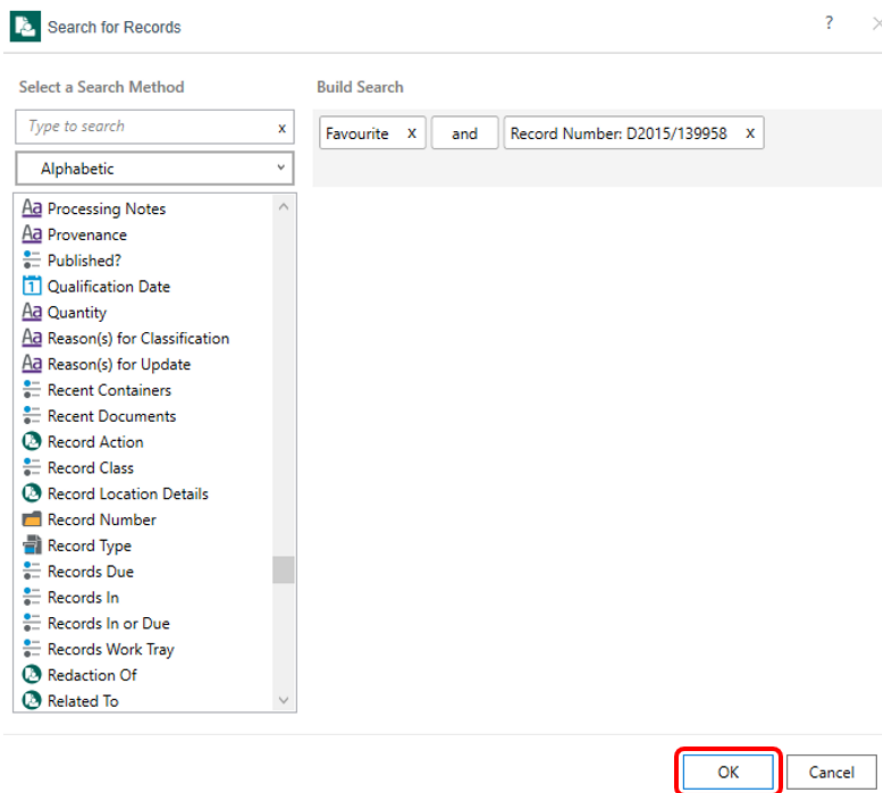
- This will open to show your favourite records first. If the record you need to send is not in your favorites, click **Search** to navigate to the record you wish to attach.



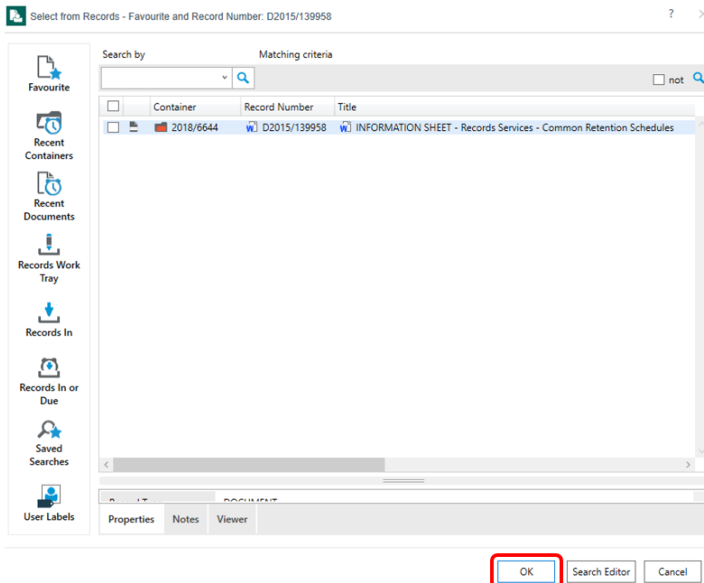
5. If searching, a new window will open. Select 'Alphabetic'. Scroll down to 'Record Number'. Or select other method to search for records. Enter 'Record Number' and click on 'Add'.



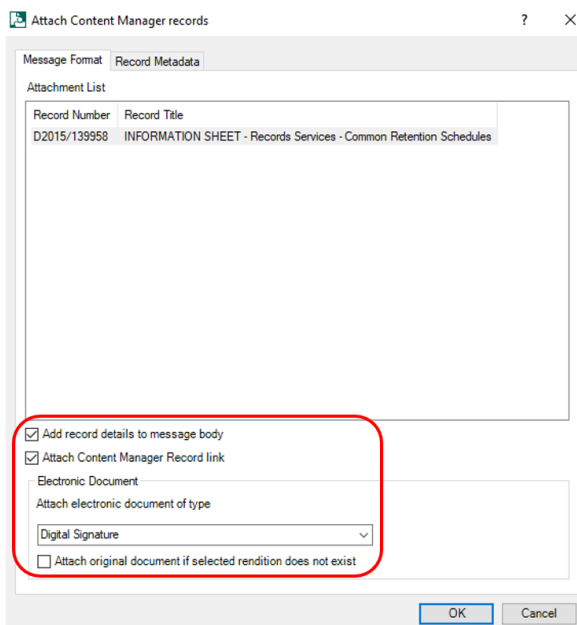
6. The below window will open, Click **OK**.



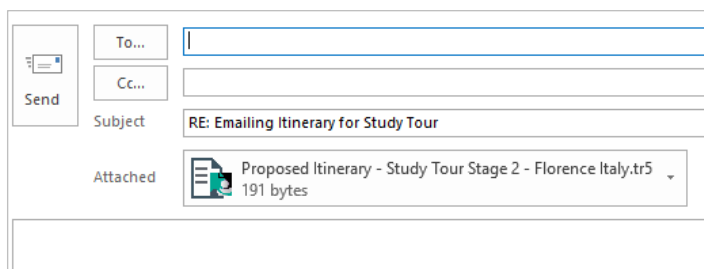
7. The below window will appear, click **OK** again.



8. Check tick boxes **Attach a Content Manager Record Link** or for Electronic Document tick **Attach original document if selected rendition does not exist**, or both options to the email. Click **OK**.



9. Add email text and include your university signature to your email before sending.



Contact Us

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