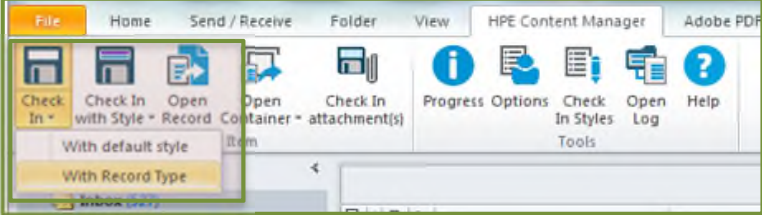
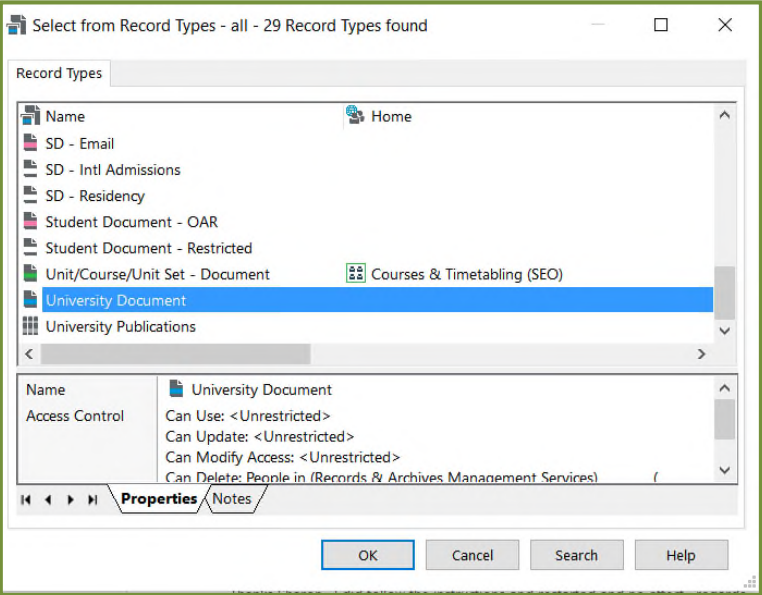
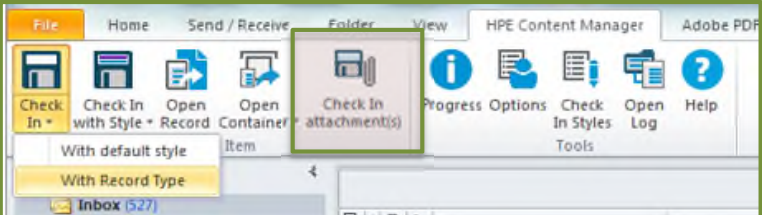


TRIM9 – Save an email

Before you can save an email to TRIM, you must know the record number of the folder you are saving it to.

<p>From your Outlook inbox, open the email</p> <p>Open the HPE Content Manager tab</p> <p>Click Check In ▾ With Record Type</p>	
<p>Select a Record Type to save the email as</p> <p>Click OK</p>	
<p>You can also Check In attachment(s) separately.</p> <p>This is the preferred option when saving documents scanned and received by email</p>	

Mandatory fields are:

Title (Free Text Part)=
Subject Line of email

- If necessary, change the title to something more meaningful

Date Created= *Date email sent/received*

Folder= *TRIM folder the email should be saved to*

- Use Student ID for Student File *OR* search for the correct file

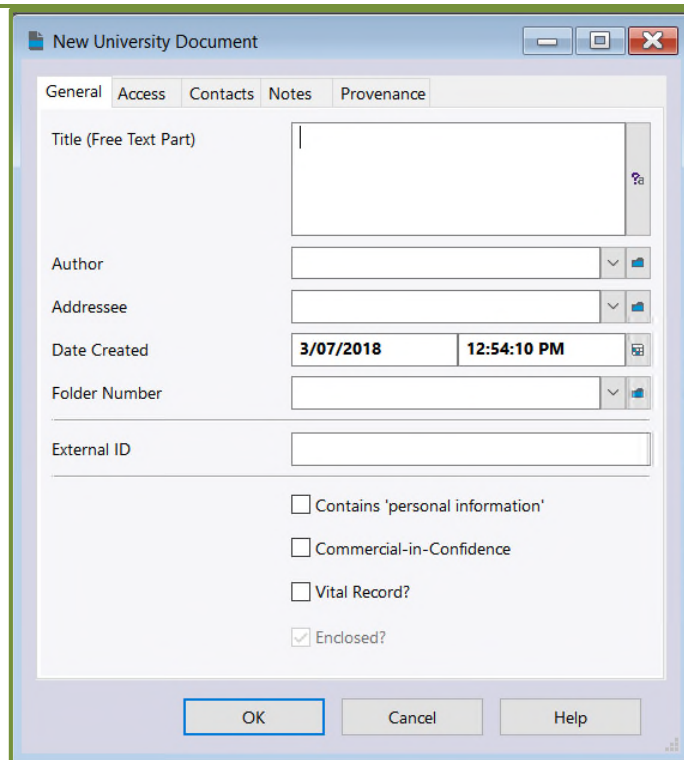
Additional fields are:

Author=*who the email was written by*

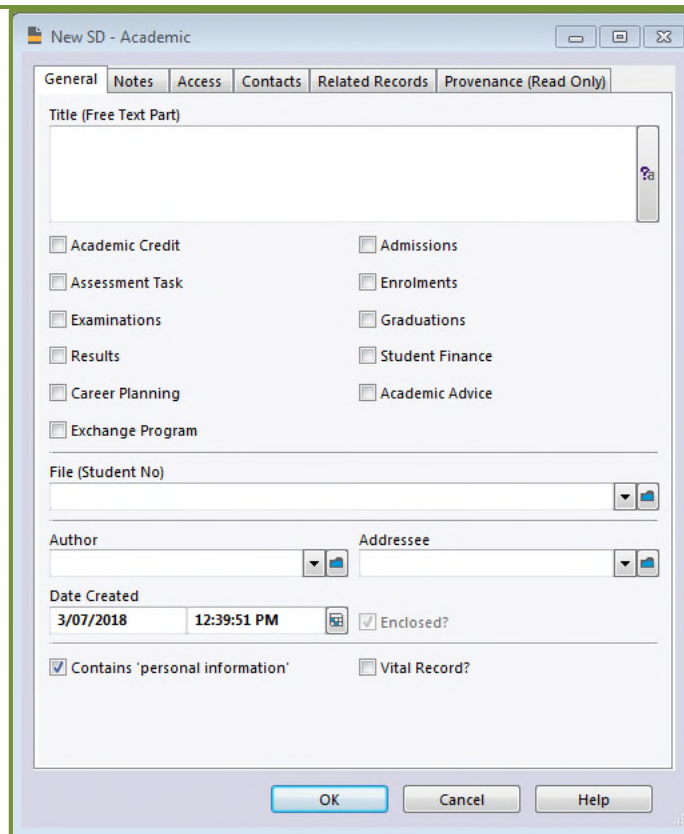
Addressee=*who the email was sent to*

- Format for names is *Surname, Given Name.*

Click **OK**



The **New Record** entry form is a different for a Student Documents



The subject line in **Outlook** is prefixed with **TRIM** indicating the email has been saved to TRIM. (*Not when saving attachment only*)