



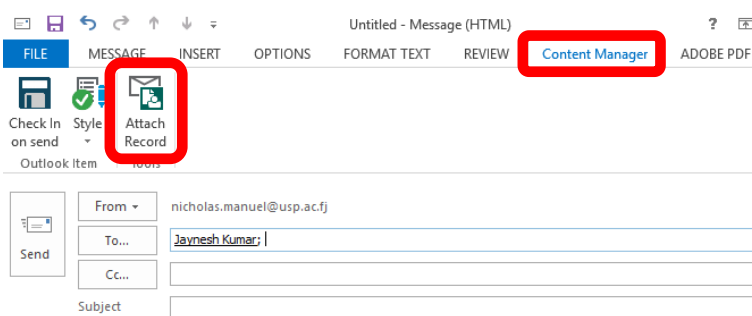
ATTACH AND FORWARD A CM DOCUMENT USING MS OUTLOOK

This document provides you instructions on how to attach and forward a document that is retained in CM to other parties using MS Outlook:

- Option 1 - attach and forward a CM document in MS Outlook
- Option 2- email a document directly from CM using MS Outlook

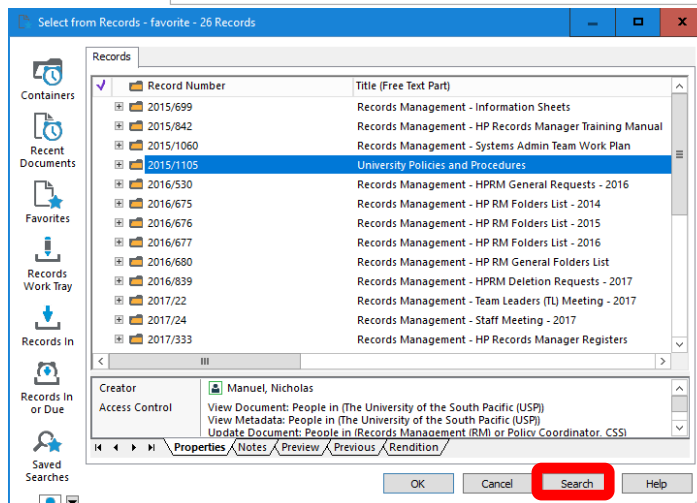
Option 1: Attach and forward a CM document in MS Outlook:

- 1) Open MS Outlook. Compose new email and click on **Content Manager** on the menu bar. Choose **Attach Record**.

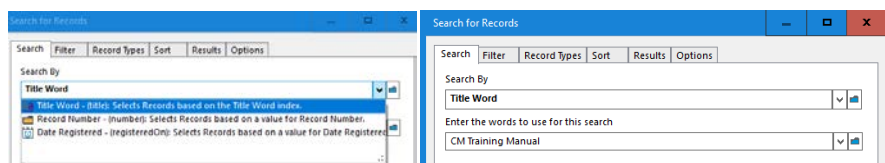


- a) A window will pop up with the favourites folders by default. To search for a particular folder/document, select **Search** at the bottom right. Another window will pop up with where you will have to select your search option from the **Search By** drop down menu.

In this example, I have chosen to search by **Title Word**.



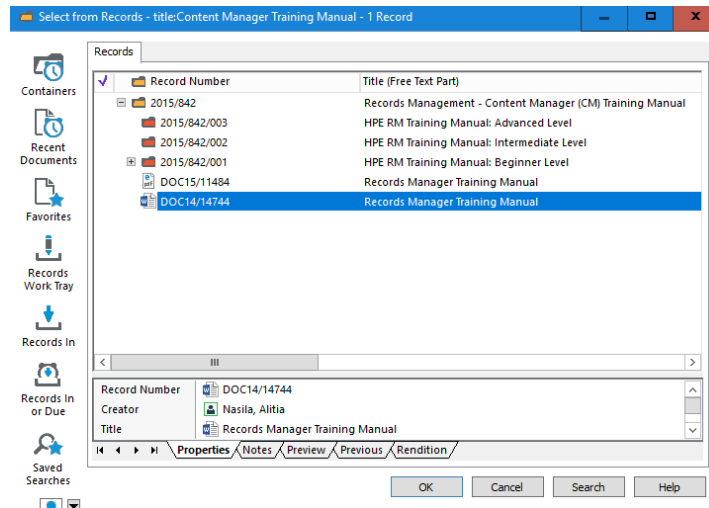
- b) In the **Enter the words to use for this search box**, type the folder name e.g. CM Training Manual and click OK



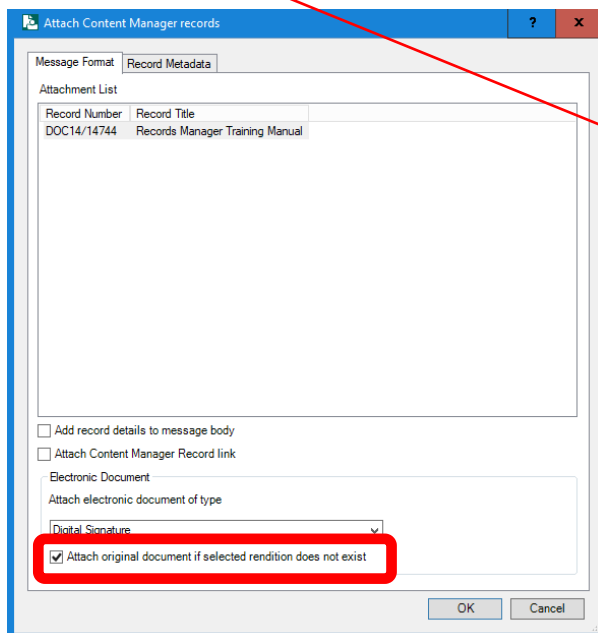


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- 2) This opens the folder named **CM Training Manual**. Select the document you want to attach and click **OK**.

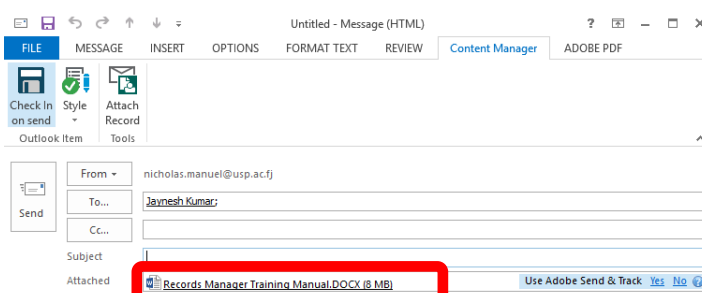


- 3) The **Attach Content Manager records** window will give you three options. I have selected the **Attach original document if selected rendition does not exist** option. Click **OK**.
(Refer to the text box for more information on the options.)



- i. **Add Record details to message body** – This allows you to automatically include the document details in the message of your email.
- ii. **Attach Content Manager Record link** – This allows you to attach the HPRM link to the email
- iii. **Attach original document if selected rendition does not exist** – This allows you to attach the document to your email.

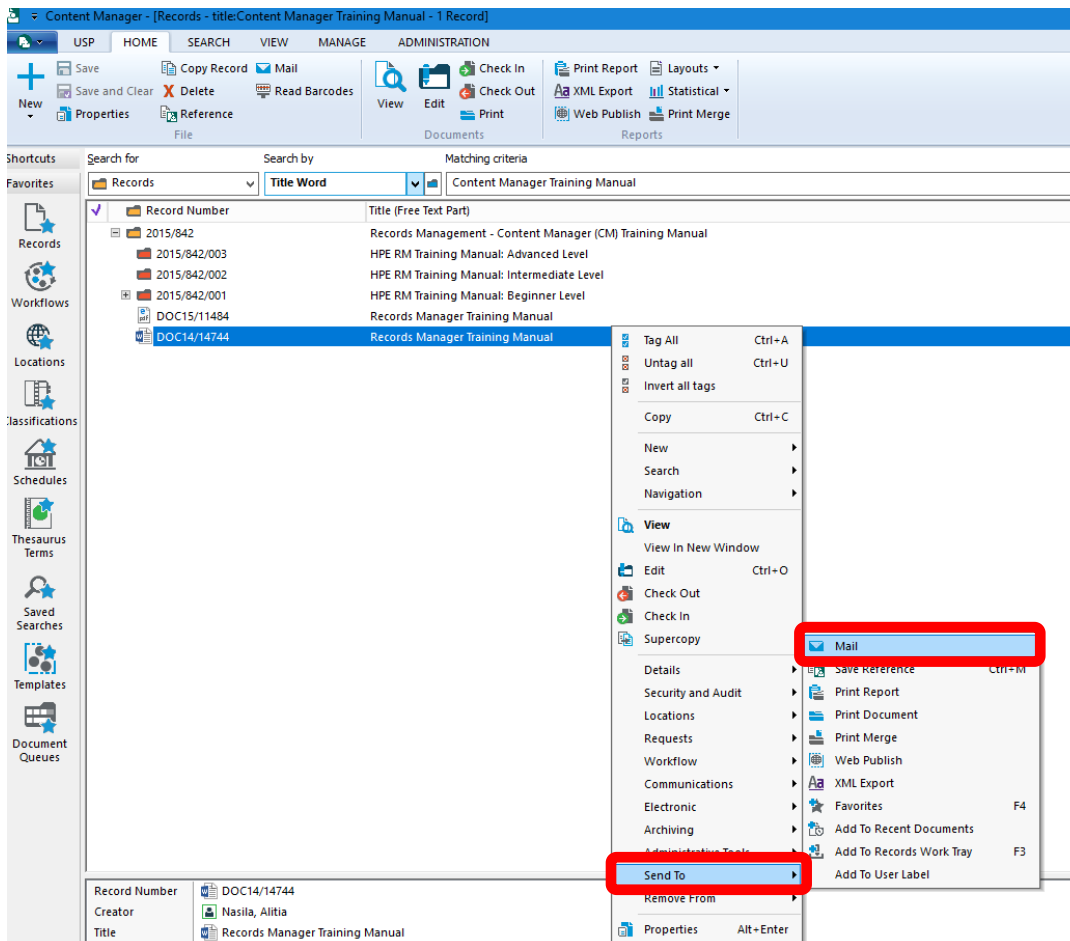
- 4) Your email message window will now appear with your CM document attached.



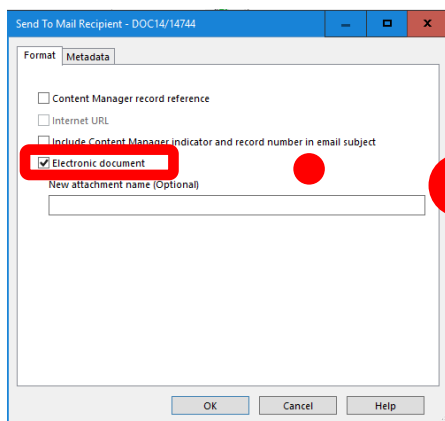


Option 2: Email a CM document directly from CM using MS Outlook

- 1) Open CM and navigate to the CM document you want to send. Right click on the CM document, click **Send To** → **Mail**



- 2) This opens the dialog box below. Place a tick in the box of your choice and click **OK**



Note:

Since you are sending the document via email, you will place a tick in the 'Electronic document' box.

Similarly, if you want to send the link, you can place a tick in the 'Content Manager record reference' box.



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- 3) Your email message window will now appear. Notice that the CM document is attached.

-----< Content Manager record Information >-----
Record Number : DOC14/14744
Title : Records Manager Training Manual

Note:
This is the CM document reference and you may delete it if you want to.

For further information or for advice please do not hesitate to contact the Records Management office.