



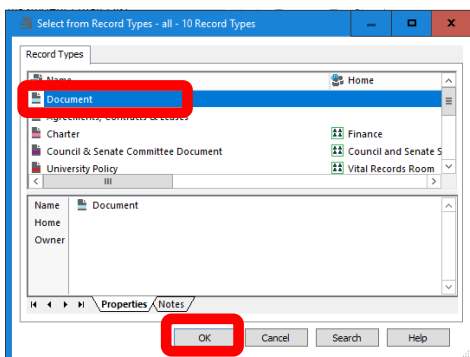
SAVING AN EMAIL

This document provides you instructions on how to save an email into Content Manager:

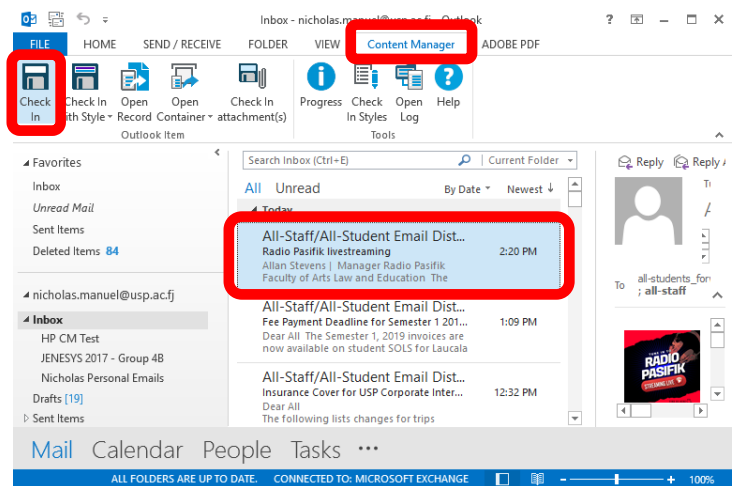
- Option 1 – saving an email using the check in option
- Option 2 - drag and drop method

Option 1: Saving an email using the check in option:

- 1) Open MS Outlook. Select email that you would like to save into CM. Click on the **Content Manager** tab and select **Check In**
- 2) The **Record Type** window will appear. Select **Document** and click **OK**



- 3) Select the CM folder that you wish to save your email into by completing the **New Document** entry form.



The subject of the email will be the default title and this can be edited.

If you know the folder number you can type it here
OR
Click on the blue folder icon and search for the folder.

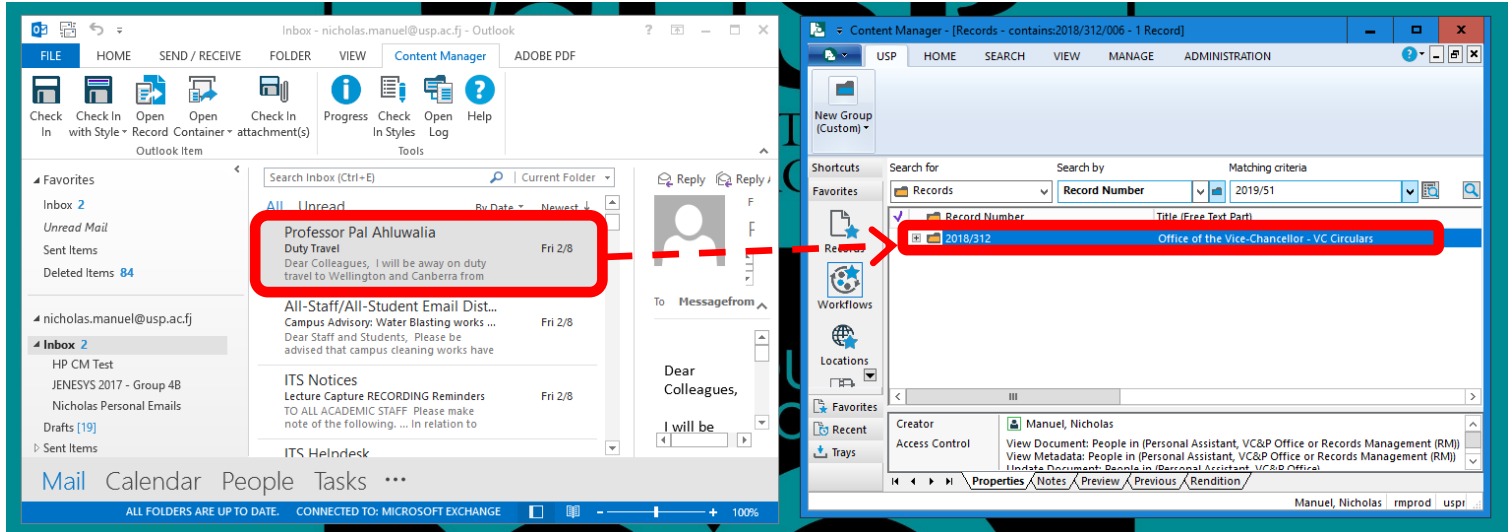
You can insert useful information regarding this email here.



Option 2: Saving an email using the Drag and Drop method

- 1) Arrange your computer's window so that the MS Outlook window and your CM window are both visible on your desktop.

In this example, we will be saving the *"Duty Travel"* into the CM folder **2018/312**.



- 2) Drag and Drop – Click on the *"Duty Travel"* email using the left mouse button. Hold down your finger and drag the email across to the CM folder (**2018/312**) and release the mouse button.

Note: You can also save multiple emails into CM using the Drag and Drop method – refer to **"Saving Multiple Documents"**

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