This method allows you to forward TRIM References or Electronic Documents that are retained in TRIM to other parties where appropriate using Outlook.

1. Select New Mail Message.
2. Go to the HP TRIM/Add-Ins tab.
3. The following TRIM toolbar options are available. (If greyed out, check the integration setting as shown in Cheat Sheet – 34)

   - Catalogue/TRIM on Send — identifies that you wish to place email into TRIM once sent.
   - Attach Records — allows you to attach a reference or electronic document to the email.

4. Select Attach Records and enter your search parameters (You may tag multiple records from the same window if required).
5. The Search for Records form will be presented for you to select the records you require. (You may tag multiple records).
6. The following form will be presented to allow the following options. (Note: You can add further records by Right Click > Record Search).
   - Add Record Details to Message Body — allows the metadata details to be added to the body of the email.
   - Attach HP TRIM Record Reference — used for attachments being sent to other University TRIM users.
   - Attach Electronic Document — used for attachments being sent to all other people that are not on TRIM or are external to the University.
7. Once you have attached the attachments they will be listed in the Attach/Attached field.

8. Continue to process the email using TRIM on Send functionality if applicable.

Refer to the TRIM Help file for further clarification.

Refer to TCS33 – Manual Catalogue of Email into TRIM using Outlook - INT09/2302

Refer to TCS34 - Outlook Integration with TRIM Set up - INT09/2308