Creating links with email folders with TRIM folders enables users to reduce the amount of data entry when cataloguing emails into TRIM. When placing items into the linked email folder, depending on how it is set up will depend on how much effort is required by the individual.

This is achieved by following these steps:

1. Create an appropriate titled folder in your email folders.

2. Highlight the folder and go to the TRIM tool bar and select the drop down arrow from ‘TRIM’ and select Current Folder. (Note in Office 2010 you find the tool bar from the Add-Ins Tab.)

3. Select Create Link

4. Fill in the TRIM Folder properties ‘Record Type’ field and ‘Container’ options. (Note: you have to remove the ‘No Default’ and populate both these fields). If you do not want to process all emails placed in the folder tick the “Display data entry form when cataloguing messages”. If you want it fully automated leave blank.

5. You have now linked the folders.
Processing emails from linked folders

When you place an email into the email folder, TRIM will present the TRIM Entry form if you have selected the ‘Display data entry form when cataloguing messages’ option. If you do not want to place the email into TRIM, select the cancel button.

If you have bypassed the ‘Display data entry form when cataloguing messages’ it will automatically process the email into the TRIM folder with limited metadata. (for example it won’t populate both the author/addressee fields).

Managing linked folders

By linking your email folders gives you access to these options. You can open the TRIM container, Clear Backlog, Remove Link and check the Properties of the link.

Please refer to the TRIM Help file for clarification of these options.

It is important that you remove the link once you no longer receive or create new records for this folder.

For further help refer to:

TCS33 Manual Catalogue of Email into TRIM using Outlook – INT09/2302
TCS35 Attaching records from TRIM to an email message using Outlook – INT09/2348
TCS38 Customisation of TRIM buttons in Outlook Toolbars – INT09/5705
TCS39 Creating Sub-folders – INT09/5724