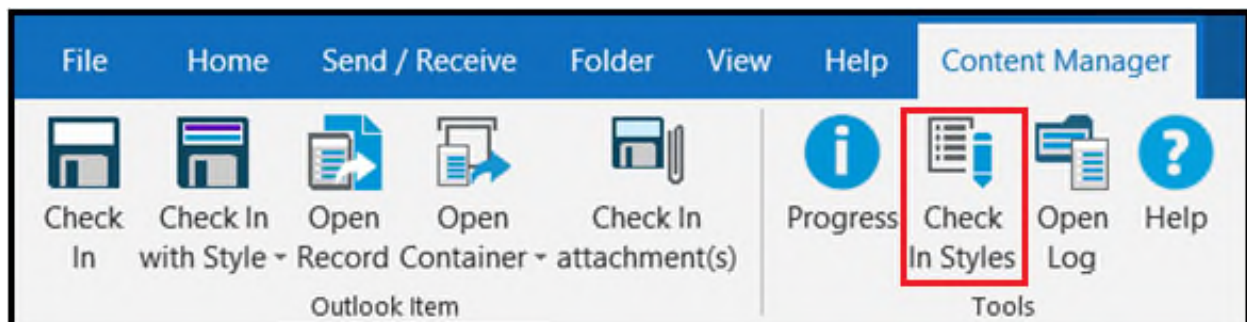

CREATING THE OUTLOOK LINKED FOLDERS

In your Outlook's Content Manager tab, click on the **Check in Styles** menu.



The CM check in style tab will be displayed to the right of your Outlook window.

To create new check in styles, and select the **blue “+”** sign



Check in style form will appear.



Linking Folders from Outlook to Content Manager

Check In Style

Name
System Configuration Docs

Record Type
ARCHIVES IRMU DOCUMENT

Container
System Configure File

☐ Show check in dialog
☐ Delete after check in

Link Outlook Folder(s) to Check In Style

Add Remove

OK Cancel

Name: Enter the desired name of your new check in style. Remember Check in styles are templates of how CM should process your emails, NOT the folders themselves.

Record Type: Select the record type

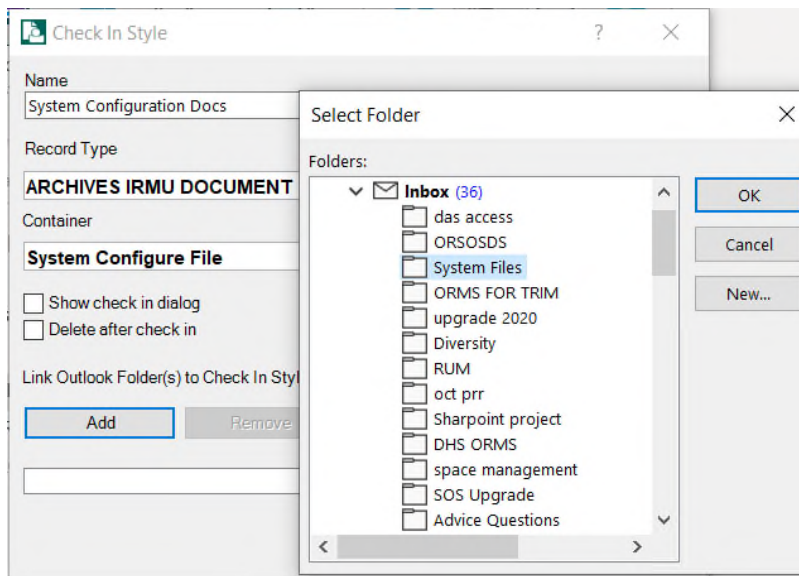
Container: Select the container (search for container or type the container no)

Optional: Show Check in Dialog and Delete after check in

Click on **“Add”** to link outlook folder (s) to check in Style



Linking Folders from Outlook to Content Manager



Select an Outlook folder from your folder list and click ok

Click OK to save the changes to the check in style

NOTE: if you have the same configuration for multiple outlook folders, you can set ALL of them to use the SAME check-in style.

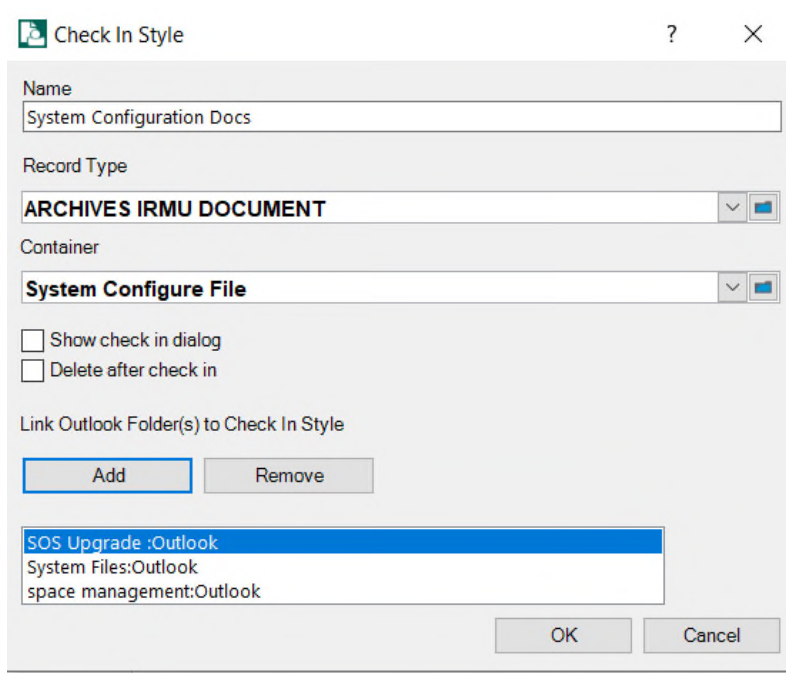
For example (below): emails from 3 Outlook folders (SOS upgrade, system files and space management) will be processed as the same record type, go into the same container, these folders can be added to the same check-in style.



Additional questions? Contact ORMS Support at
1-888-354-2006
ormshelp@chavessupport.com



Linking Folders from Outlook to Content Manager

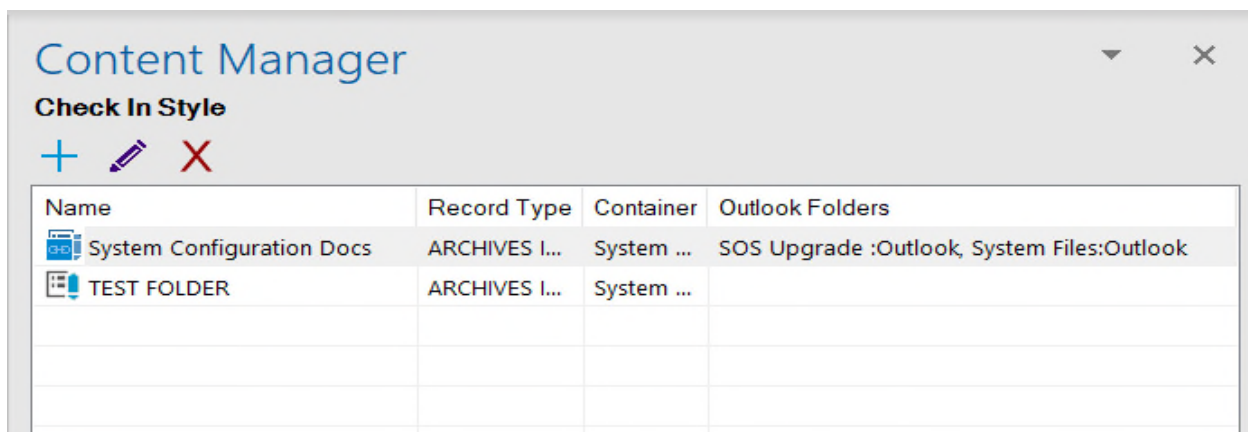


The 'Check In Style' dialog box is shown. It has a title bar with a question mark and a close button. The fields are as follows:

- Name:** System Configuration Docs
- Record Type:** ARCHIVES IRMU DOCUMENT
- Container:** System Configure File
- ☐ Show check in dialog
- ☐ Delete after check in
- Link Outlook Folder(s) to Check In Style:** Includes 'Add' and 'Remove' buttons and a list box containing:
 - SOS Upgrade :Outlook
 - System Files:Outlook
 - space management:Outlook

At the bottom are 'OK' and 'Cancel' buttons.

Once you have created a check in style, you will see a list of them. You can manage the check in style by adding **new** (+ icon), **edit** settings (pencil icon), or **delete** (X icon) the check in style.



The 'Content Manager' window shows a 'Check In Style' section with icons for adding (+), editing (pencil), and deleting (X). Below is a table listing the styles:

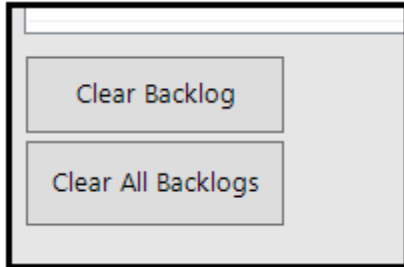
Name	Record Type	Container	Outlook Folders
 System Configuration Docs	ARCHIVES I...	System ...	SOS Upgrade :Outlook, System Files:Outlook
 TEST FOLDER	ARCHIVES I...	System ...	



Linking Folders from Outlook to Content Manager

CLEARING BACKLOGS

when you open the Check in Style dialog, you will see the available functions as below.



Clear backlog Will process the unprocessed items from a single/selected outlook folder linked with the check in style.

Clear all backlogs will process all the unprocessed items from all the Outlook folders linked with the check in style