

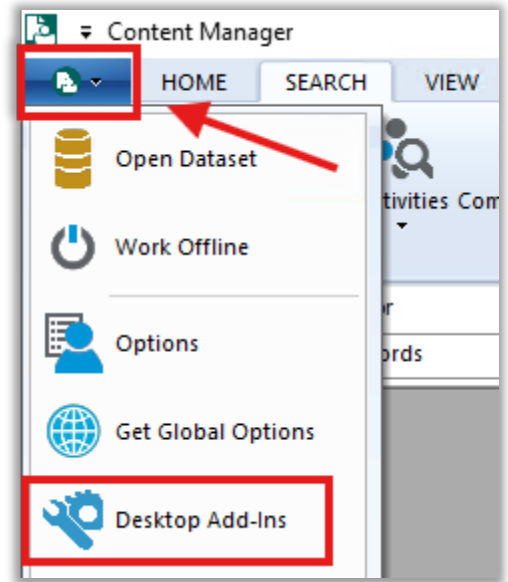
Enabling Content Manager Add-in in Outlook & Creating Linked Folders

Note: Only follow these instructions if you plan to do the Outlook and Content Manager direct integration. Enabling the Content Manager Add-in will slightly increase the time that Outlook takes to load.

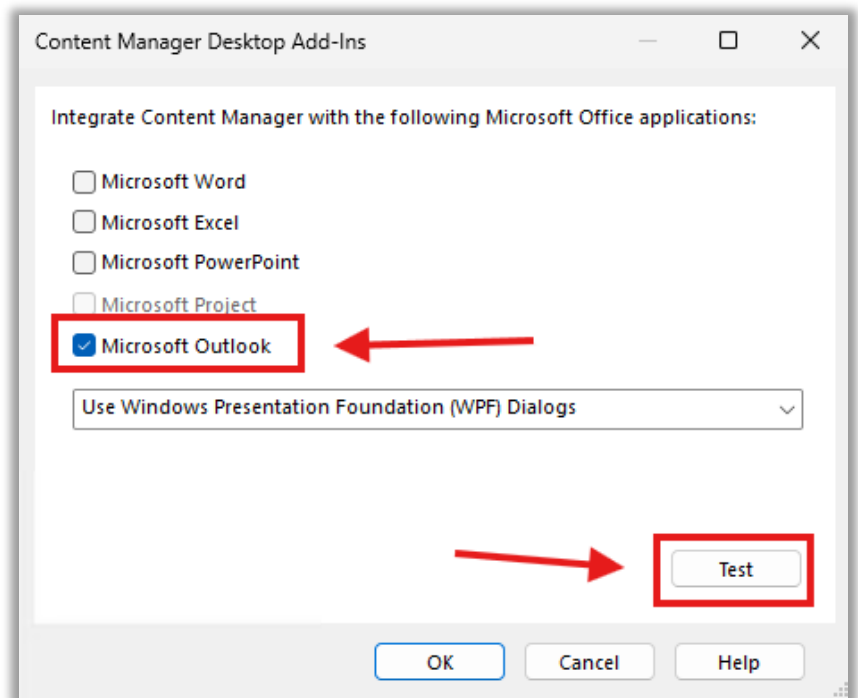
Turning on the Integration Setting in Content Manager

Step 1. Ensure Outlook is not currently open on your device.

Step 2. Click on the blue **FILE** button in the top left corner of Content Manager, then click on **DESKTOP ADD-INS**.



Step 3. In the pop-up window, select the **MICROSOFT OUTLOOK** option, then click on the **TEST** button.

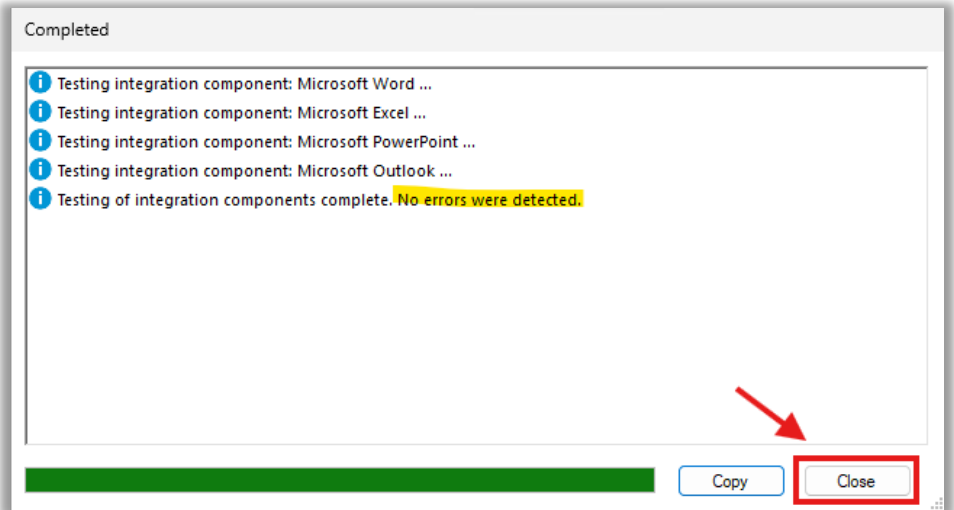


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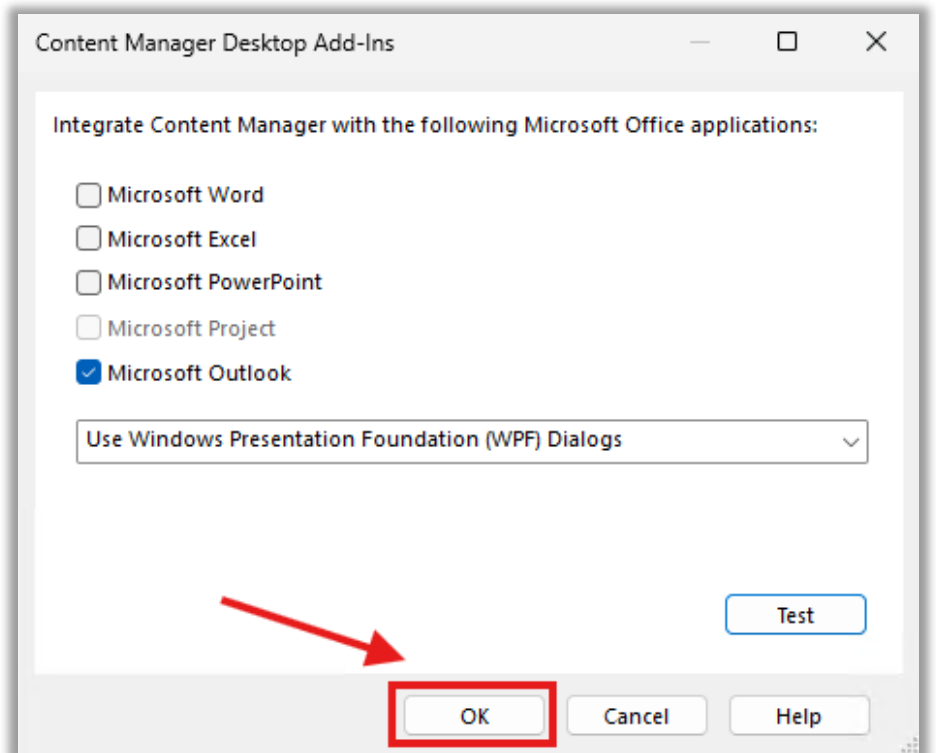
Step 4. The test results should say
“**No errors were detected.**”

If any errors were detected, contact
ORMS Support.

Click the **CLOSE** button.



Step 5. Click the **OK** button.



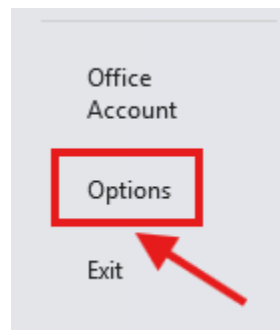
Enabling Content Manager Add-in in Outlook & Creating Linked Folders

Turning on the Content Manager Add-In on Outlook

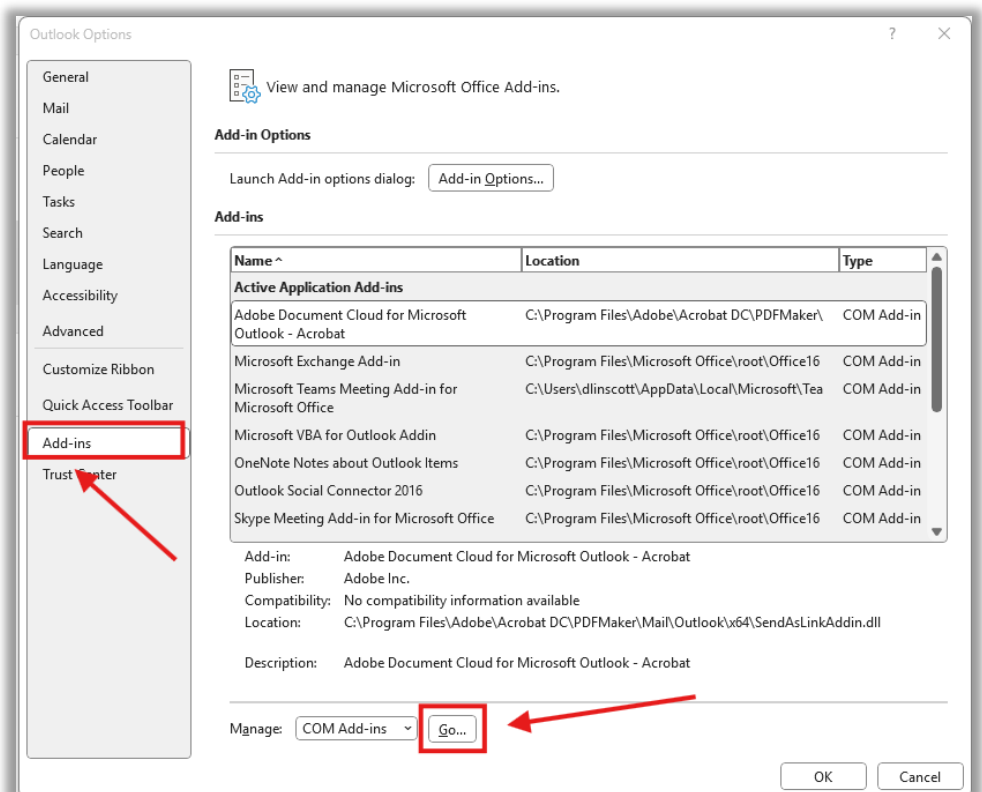
Step 1. Within Outlook, click on the **FILE** tab.



Step 2. Click on the **OPTIONS** selection.

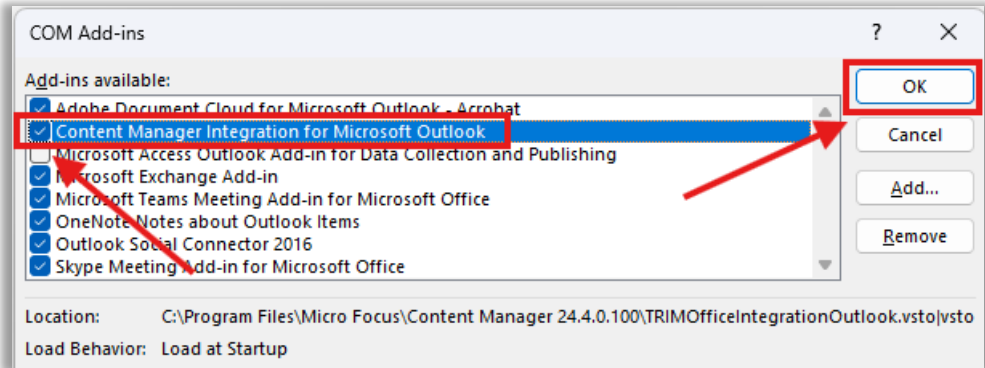


Step 3. Click on the **ADD-INS** option then click on the **GO...** button.

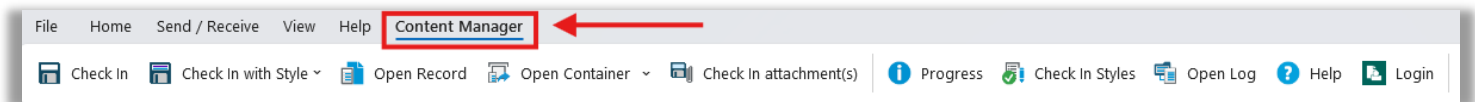


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Step 4. Check the box next to **CONTENT MANAGER INTEGRATION FOR MICROSOFT OUTLOOK** then click on the **OK** button.



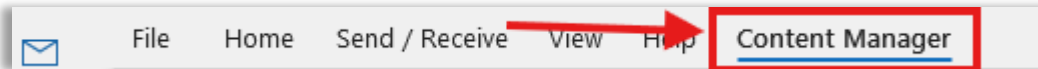
Step 5. Close Outlook, then re-open it. The Content Manager button should now appear on the ribbon on the top of the screen in Outlook.



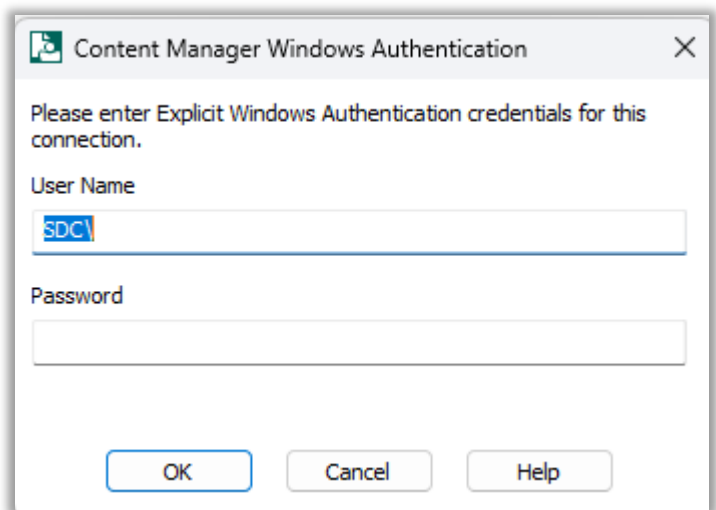
Enabling Content Manager Add-in in Outlook & Creating Linked Folders

Creating Linked Folders in Outlook, Connecting to Content Manager

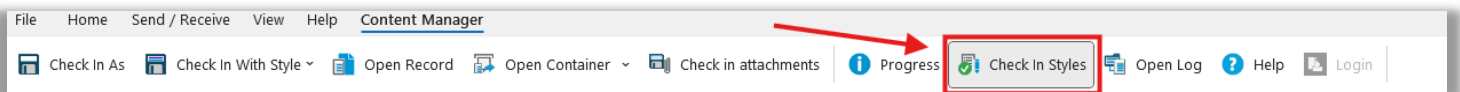
Step 1. In Outlook, click on the **CONTENT MANAGER** tab in the top menu.



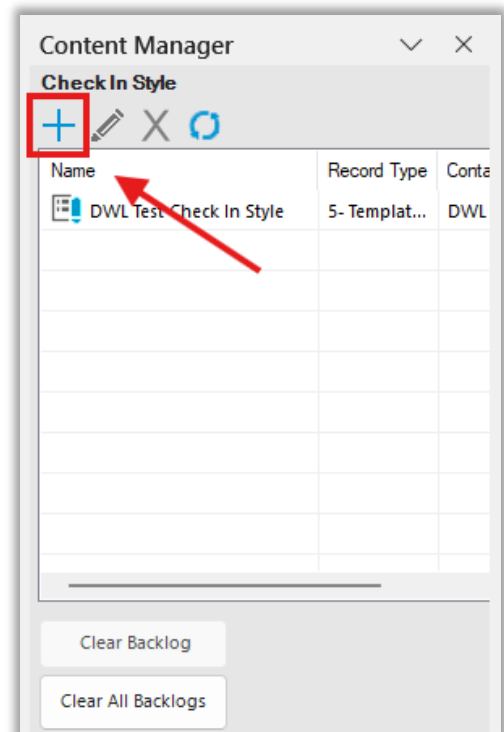
Step 2. You will receive a pop-up window prompting you to log into Content Manager, proceed to log in.



Step 3. Under the **CONTENT MANAGER** tab, click on the **CHECK IN STYLES** button.



Step 4. The **CHECK IN STYLE** window will appear on the right side of your Outlook. To create a new check in style, click on the **BLUE PLUS BUTTON**. 



Enabling Content Manager Add-in in Outlook & Creating Linked Folders

Step 5. Fill out the **CHECK IN STYLE FORM**.

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.

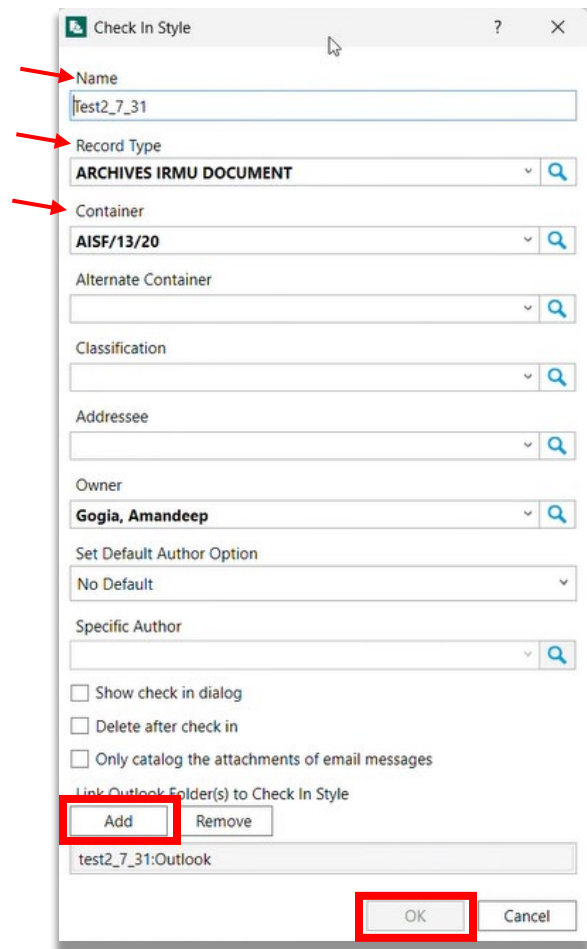
Container: Select the container (search for container or type the container number).

Optional: Show Check in Dialog and Delete after check in.

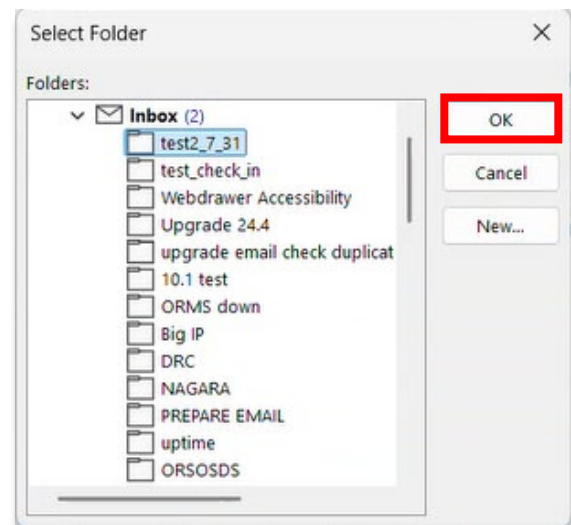
Step 6. Click on the **ADD** button to link Outlook folders.

Step 7. Select an Outlook folder from your folders list, then click the **OK** button. Alternatively, you can click the **NEW...** button to create a new folder.

Click the **OK** button to save the changes to the Check In Style.



The 'Check In Style' dialog box is shown with several fields and options. Red arrows point to the 'Name' field (containing 'test2_7_31'), the 'Record Type' dropdown (set to 'ARCHIVES IRMU DOCUMENT'), and the 'Container' dropdown (set to 'AISF/13/20'). At the bottom, the 'Add' button is highlighted with a red box. Below the buttons, the text 'test2_7_31:Outlook' is visible. The 'OK' button is also highlighted with a red box.



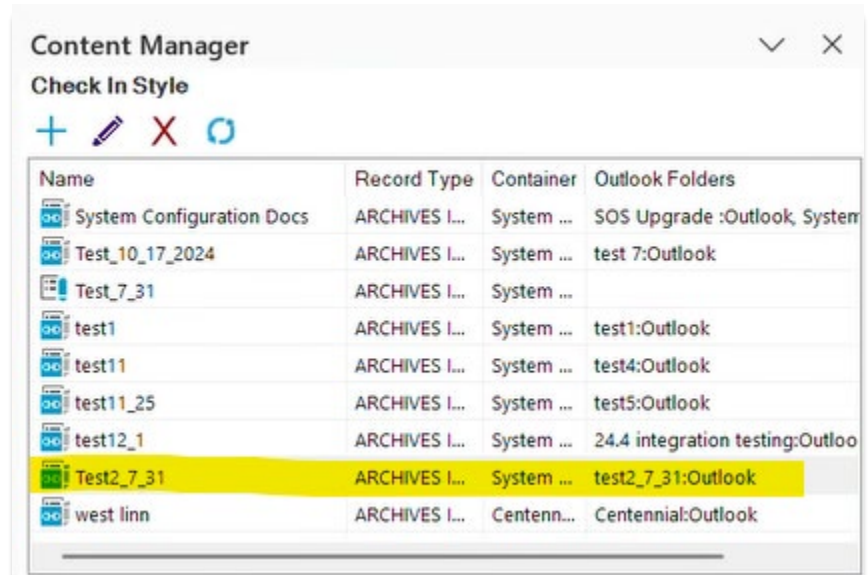
The 'Select Folder' dialog box is shown with a list of folders. The 'Inbox (2)' folder is expanded, and the 'test2_7_31' folder is selected. The 'OK' button is highlighted with a red box.

Enabling Content Manager Add-in in Outlook & Creating Linked Folders

Step 8. Once you have created a Check In Style, you will see a list of them.

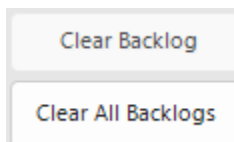
You can manage the Check in Styles with the following options:

-  **ADD NEW CHECK IN STYLE**
-  **EDIT SETTINGS**
-  **DELETE CHECK IN STYLE**
-  **RELOAD CHECK IN STYLE**



Name	Record Type	Container	Outlook Folders
System Configuration Docs	ARCHIVES I...	System ...	SOS Upgrade :Outlook, System
Test_10_17_2024	ARCHIVES I...	System ...	test 7:Outlook
Test_7_31	ARCHIVES I...	System ...	
test1	ARCHIVES I...	System ...	test1:Outlook
test11	ARCHIVES I...	System ...	test4:Outlook
test11_25	ARCHIVES I...	System ...	test5:Outlook
test12_1	ARCHIVES I...	System ...	24.4 integration testing:Outloo
Test2_7_31	ARCHIVES I...	System ...	test2_7_31:Outlook
west linn	ARCHIVES I...	Centenn...	Centennial:Outlook

When you open the Check in Style dialog, you will see the available functions:



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