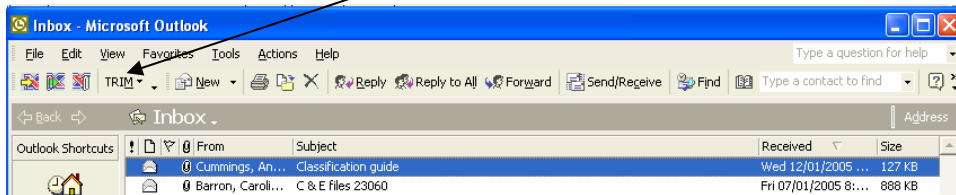


Creating a link from Outlook folders to TRIM folders

Caution: Do **NOT** link your Inbox to TRIM. If you do, all of the e-mail you receive will be captured in TRIM as official records.

Steps:

1. In Outlook, select the folder you wish to link to TRIM by highlighting it
2. On the Outlook toolbar, click **Trim**



3. From the **Trim** menu, choose **Current folder>Create Link** (the folder name you highlighted will appear as the current folder)
4. The **TRIM Folder Properties** dialogue box will open:

A screenshot of the 'TRIM Folder Properties' dialog box. The dialog box has several fields and checkboxes. Numbered callouts (1-9) point to specific elements: 1 points to the 'Outlook Folder' field (containing 'TRIM Training'); 2 points to the 'TRIM Dataset' field (containing 'FOR Prod'); 3 points to the 'Record Type' dropdown (set to 'INFORMATION MANAGEMENT GROUP DOCUMENT (THIS)'); 4 points to the 'Container' field (containing 'ARCS-01735-20/2104F'); 5 points to the 'Display data entry form when cataloging messages' checkbox (checked); 6 points to the 'Delete messages when cataloged in TRIM' checkbox (checked); 7 points to the 'OK' button; 8 points to the 'Cancel' button; 9 points to the 'Help' button. Callout 10 points to the 'Outlook Folder' field. Callout 11 points to the 'TRIM Dataset' field. Callout 12 points to the 'Record Type' dropdown. Callout 13 points to the 'Container' field. Callout 14 points to the 'Display data entry form when cataloging messages' checkbox. Callout 15 points to the 'Delete messages when cataloged in TRIM' checkbox. Callout 16 points to the 'OK' button. Callout 17 points to the 'Cancel' button. Callout 18 points to the 'Help' button.

1. The Outlook folder you want to link to TRIM

2. FOR Prod = Forest Production (i.e., TRIM)

3. Check this option if you wish to display the entry form when processing e-mails. (It allows you to enter details about each e-mail). If you do not check it, your e-mail will be processed into TRIM without displaying the entry form

4. Check **Delete Messages when cataloged in TRIM**

5. Select the electronic **record type** associated with your office from the **KwikSelect** folder

6. Click the **KwikSelect** folder to select the blue e-folder in TRIM that your Outlook folder will be linked to. Recently used folders will appear in the drop-down list for you to select from. If this is the first time you have selected an e-folder or you wish to find a new one, press **F7** to search for it. For help in searching, please refer to the search tips on the previous page

7. Click **OK** to create the link

Sending the contents of linked Outlook folders to TRIM

Specific folders:

- In Outlook, select the e-mail folder by highlighting it
- On the Outlook toolbar, click **TRIM**
- From the **TRIM** menu, choose **Linked Folder>Clear Backlog** (the folder name you highlighted will appear as the linked folder)

All folders:

- On the Outlook toolbar, click **TRIM**
- From the **TRIM** menu, select **Clear Backlogs**. The contents of all of your linked Outlook folders will be sent to TRIM.

For more information, please refer to the **TRIM Electronic Records User Guide for Ministry of Forests End Users** available on the intranet at <http://gwww.for.gov.bc.ca/his/edrms>.