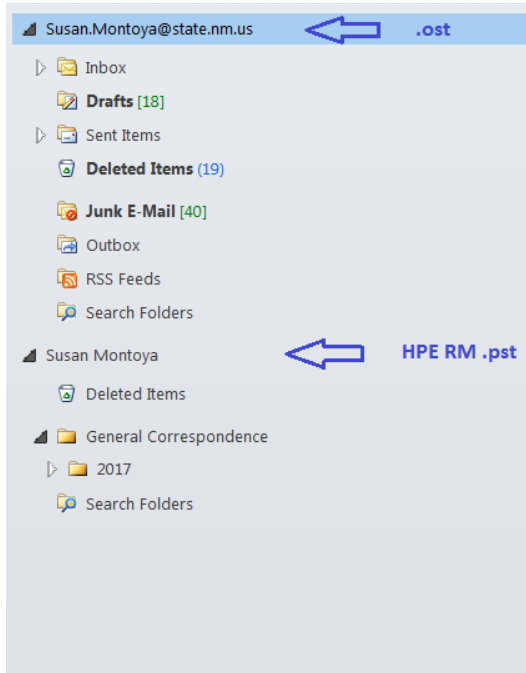


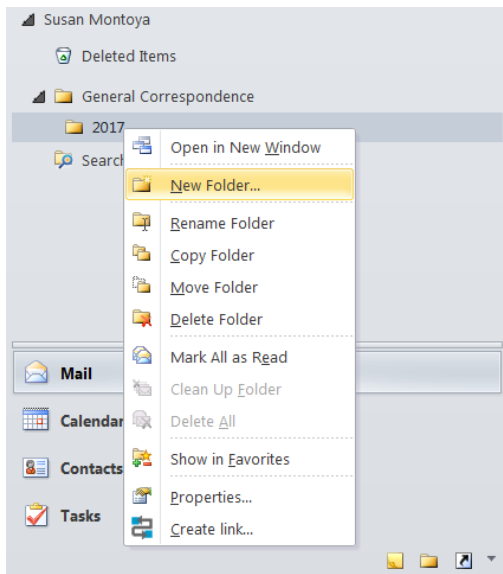
File Structure Creation and Folder Linking (in Outlook)

Creating file structure in outlook

The .pst used to add records into HPE RM will appear beneath your .ost in outlook. It will have your name as a title and contain the base structure.

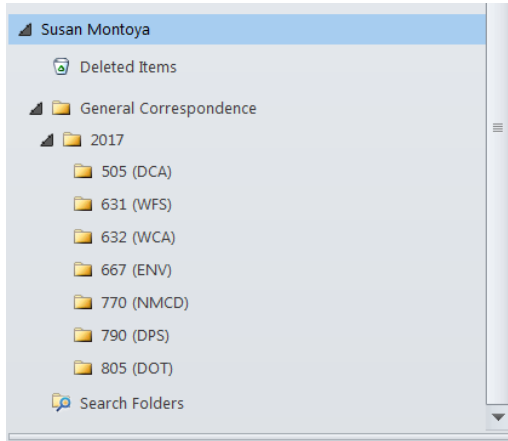


Parent folders in this .pst should be named according to the classification of the records in the folders. Subfolders should be named based on the trigger event for content within that classification. (For assistance with classification, please contact an agency analysis bureau analyst.) General correspondence will be used as an example in this guide. To create the subfolder structure for your general correspondence items, right click on the 2017 folder and select “new folder” from the menu.



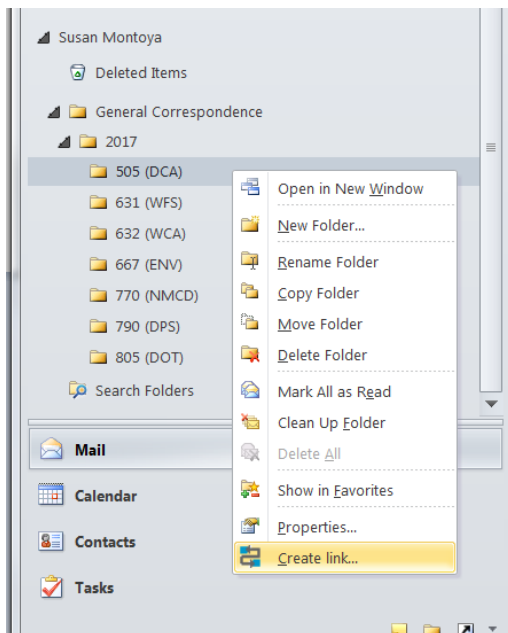
File Structure Creation and Folder Linking (in Outlook)

Subfolders in general correspondence should be named in the broadest term possible that allows for some separation in content for ease of navigation. For example, if you frequently receive correspondence from staff from a specific agency, the agency name and code should be used as the title of the subfolder.



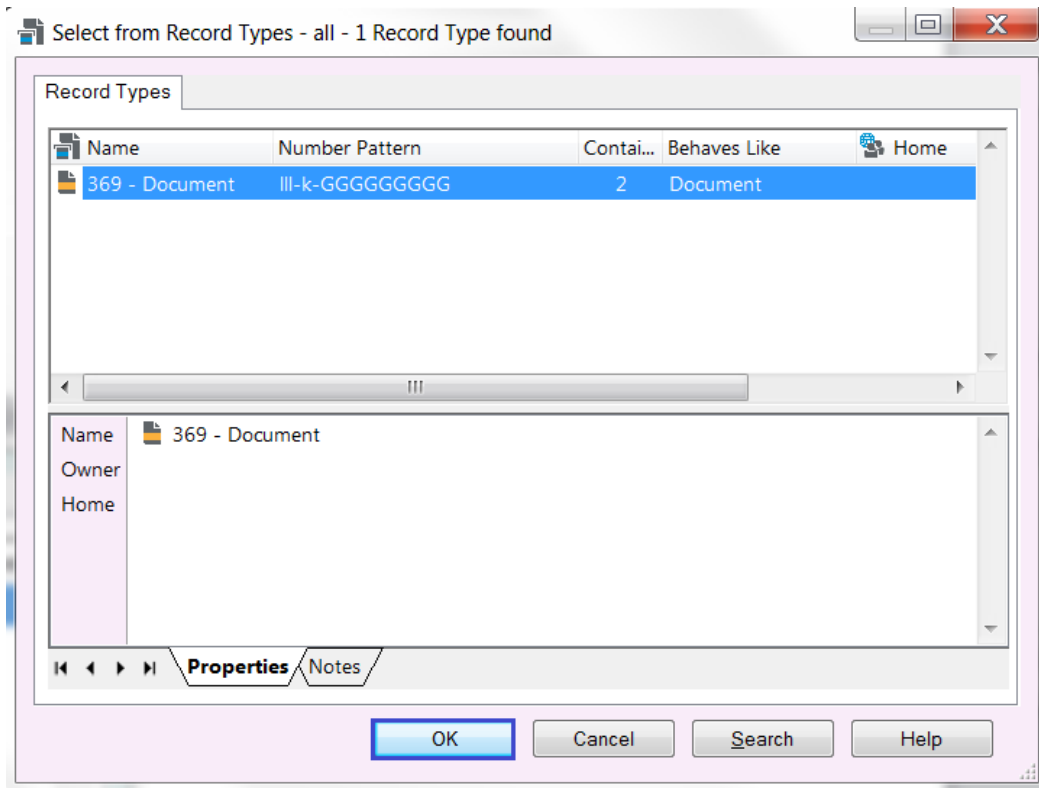
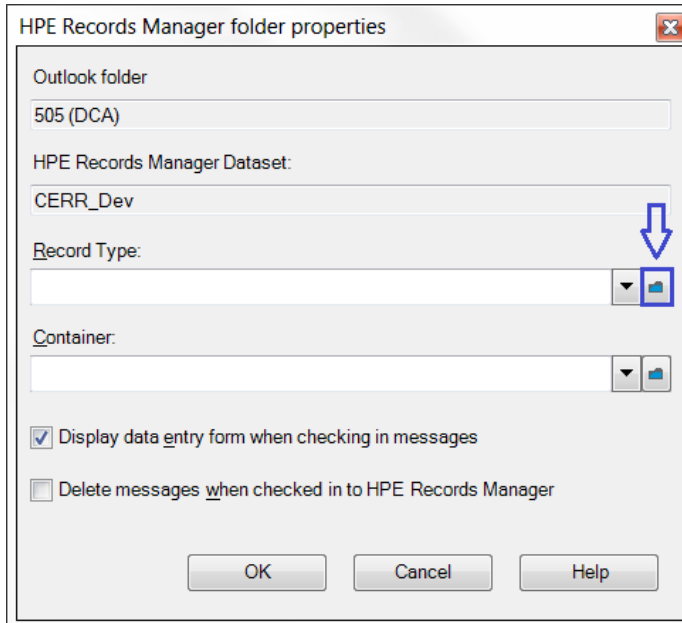
Linking outlook subfolders to folders in HPE RM

If you have not yet created the corresponding folders in HPE RM, please see the *File Creation and Naming Convention (in HPE RM)* procedure. Right click on the folder you wish to link and select “create link” from the menu. (If this menu option does not appear, contact the CERR helpdesk at CPR.RMD@state.nm.us)



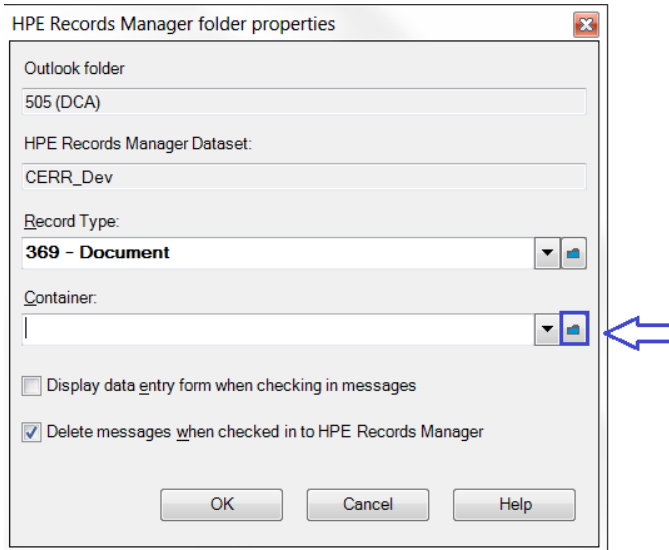
File Structure Creation and Folder Linking (in Outlook)

Using the kwikselect button, open the search screen, select the 369-Document record type, and click ok.

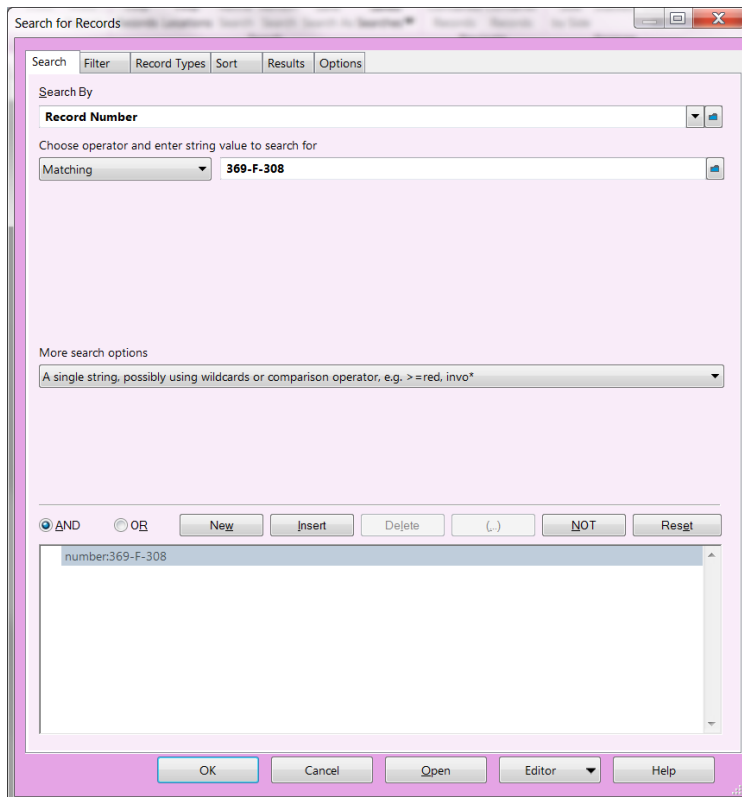


File Structure Creation and Folder Linking (in Outlook)

Using the kwikselect button, open the search screen.

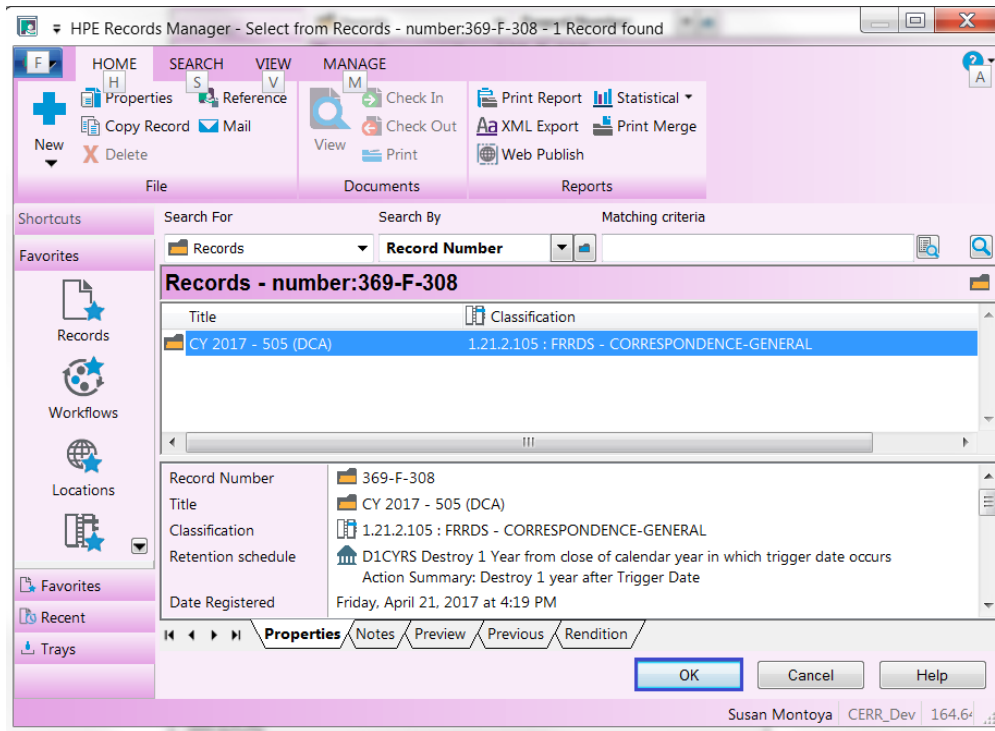


Enter the record number for the folder you wish to link to and click ok. (If you do not know the record number, search using the title or classification; for assistance in searching, please contact the CERR helpdesk at CPR.RMD@state.nm.us)

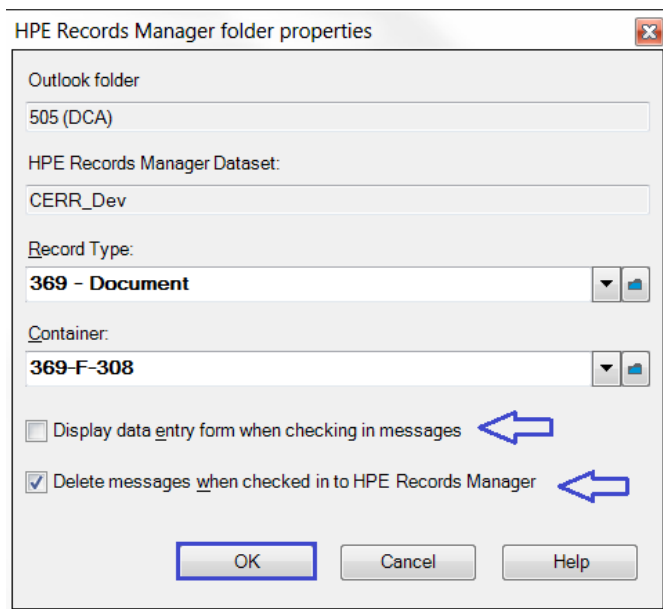


File Structure Creation and Folder Linking (in Outlook)

From the search results, select the correct folder and click ok.



Ensure that the “display data entry form when checking in messages” box is not checked, and that the “delete messages when checked into HPE Records Manager” box is checked, and click ok.



Repeat the process until each front end (outlook) folder is linked to its corresponding back end (HPE RM) folder.