

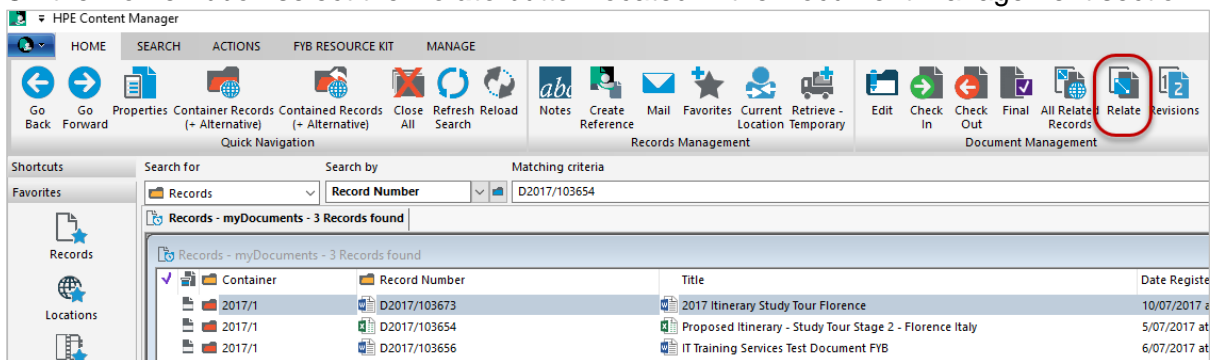
Relating Records

Introduction

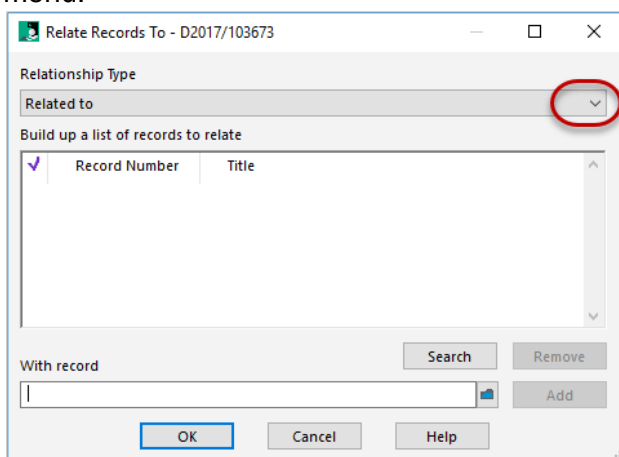
Files and documents may be related to other files and/or documents to remove the need to save a document in two or more places. For example, you can link documents that relate, such as Minutes and Agendas.

Procedure

1. Locate the document or file you wish to relate to another file or document and click on the title to select it (it will highlight blue when selected).
2. On the Home ribbon select the **Relate** button located in the Document Management section.

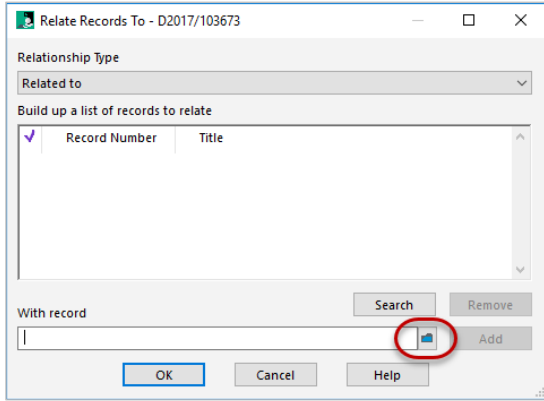


3. When the **Relate Records To** dialog box appears, select the Relationship Type from the drop-down menu.

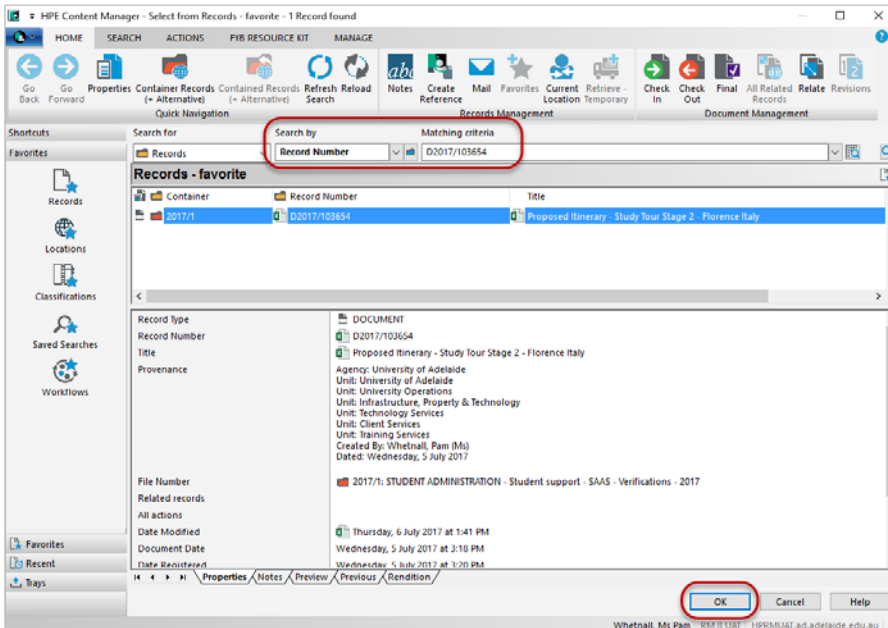


4. Then, in the **With Record** field, provide the record number of the file or document you want to relate to the one you have selected. There are two ways to do this:
 - a. If you know the record number, simply type the record number into the With Record field (recent records will show in the drop down box). Then click **Add**. (**Proceed to Step 5**).

- b. If you don't know the record number, select the blue search icon to search for the record using other criteria.

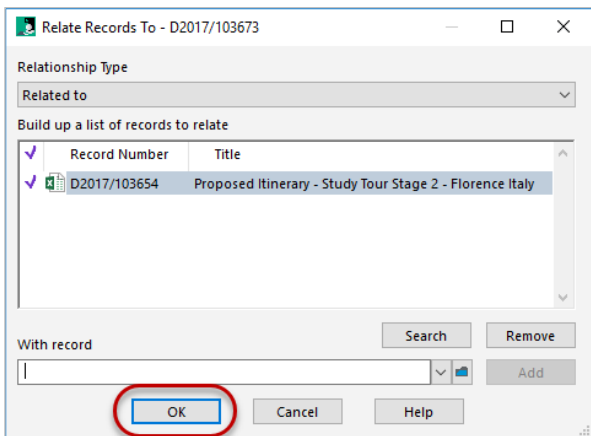


- 5. Search for the record you wish to relate to, highlight it and click **OK**.

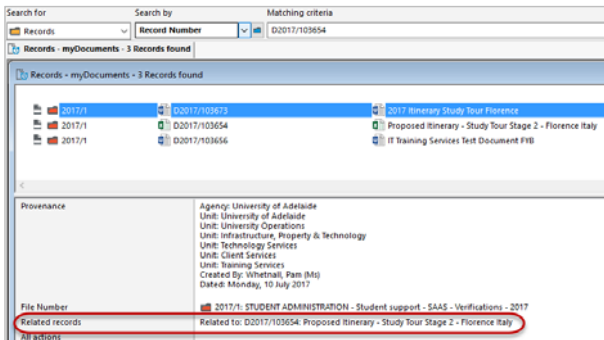


The document will appear in the list in the Relate Records dialog box. You can continue to add or search for more documents to relate.

- 6. Click **OK**.

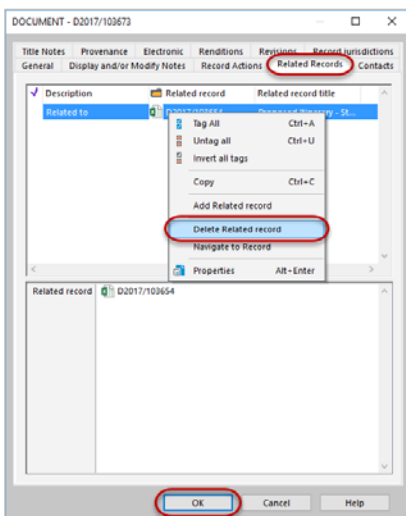


7. Related records show in the Properties field.



To remove relationships between documents or files

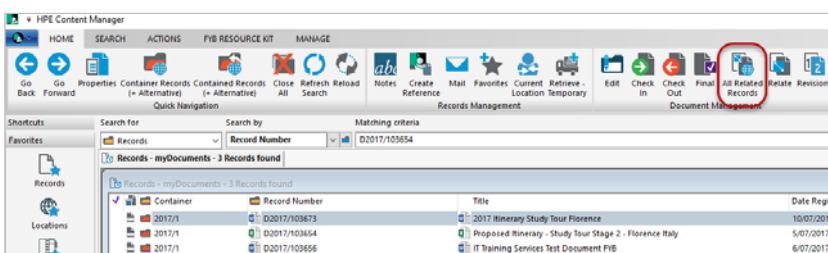
1. Search for and select one of the records you wish to remove the relationship from.
2. Click the **Properties** icon on the **Home** ribbon.
3. Go to the **Related Records** tab.



4. Right click on the document/file you wish to remove the relation from.
5. From the menu select **Delete Related record**. The record will disappear off the list.
6. Click **OK**.

Navigating to All Related Records

1. Select a document which you wish to see all the related records.
2. On the Home ribbon select the **All Related Records** button located in the Document Management section. A list of related records will appear.



Contact Us

For further support or questions, please contact Records Services on **8313 5334** or records.services@adelaide.edu.au