

Create External Locations

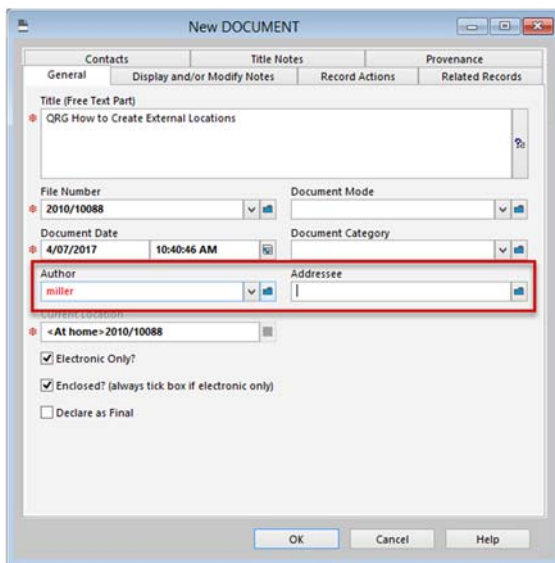
Introduction

Internal locations can only be created by Records Services, and consist of university staff, departments, storage areas, teams and security groups. External locations can be created by Content Manager licence holders. These can be used to designate people and organisations that are contacts of the university. Contacts listed as external locations can be assigned as authors or addressees of documents.

Note: When registering a document in Content Manager (or editing the document properties) the author and addressee fields are not mandatory fields. Should you wish to assign an external contact as an author or addressee, you must search first to see if the external location already exists. If the location you wish to use is not already included in the location table, a new external location can be created.

Procedure

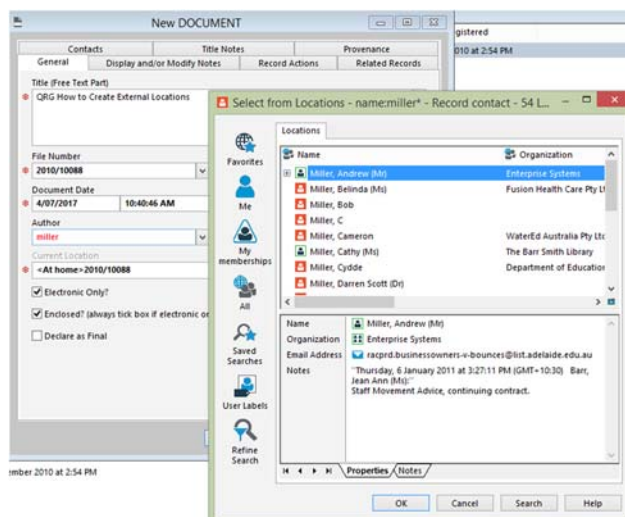
1. When registering a new document (either using Office integration or drag and drop), complete the Document Title and File Number fields as usual, following business rules. Mandatory fields are noted with a *



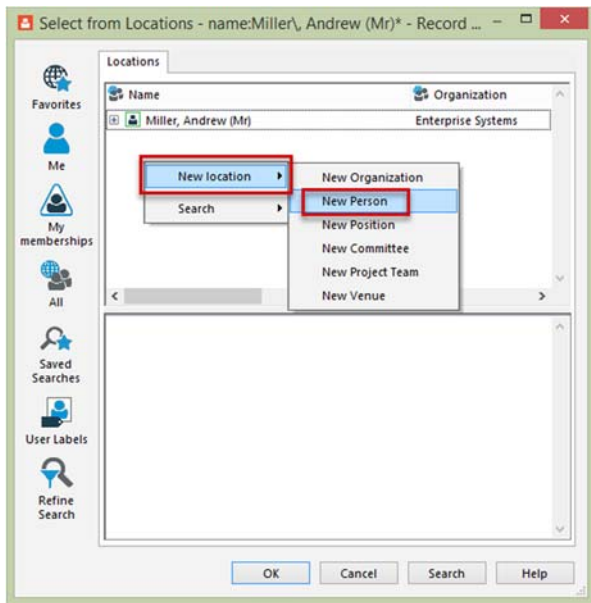
The Author/Addressee fields are not mandatory fields. Unknown contacts can be removed from these fields or to add, type the surname of the person you wish to add as the Author / Addressee of the document.

Click the **Kwik Select** folder (blue folder icon) next to the text entry field to access the location table.

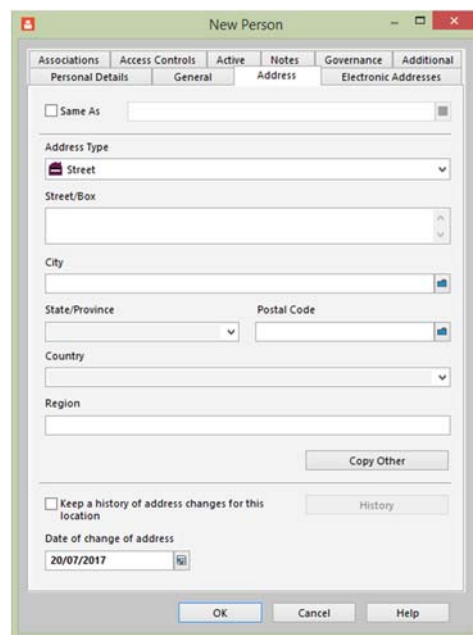
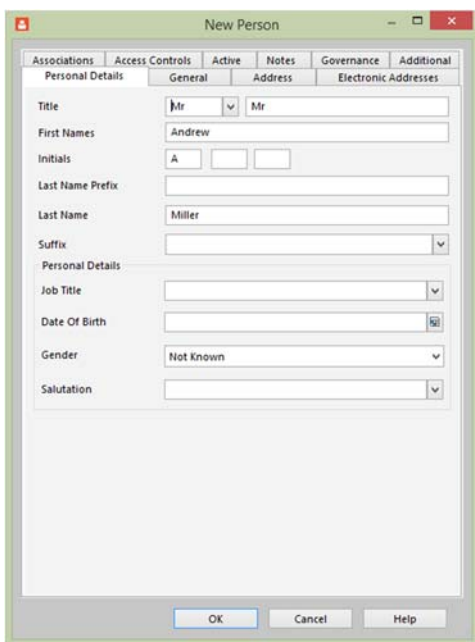
This will display the existing list of available locations matching the name criteria you have entered.



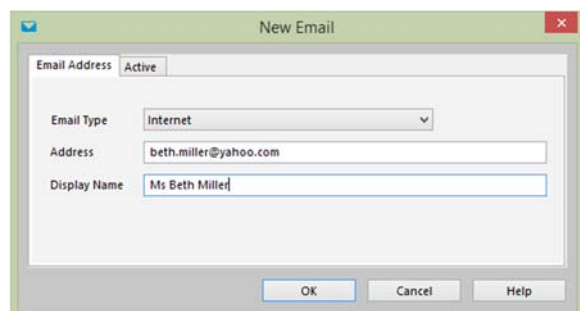
2. If the location you wish to add as Author/Addressee is listed, select their name and click **OK**.
3. If the location you are looking for does not appear, you need to create a new location. **Right-click** in the Locations list and select **New location > New person**.



4. The **New Person** entry form will display. In the **Personal Details** tab, complete details of the contact's Title, First Name, Last Name, Gender (if known).
5. Move to the **Address Tab** for completion of address details (if known).

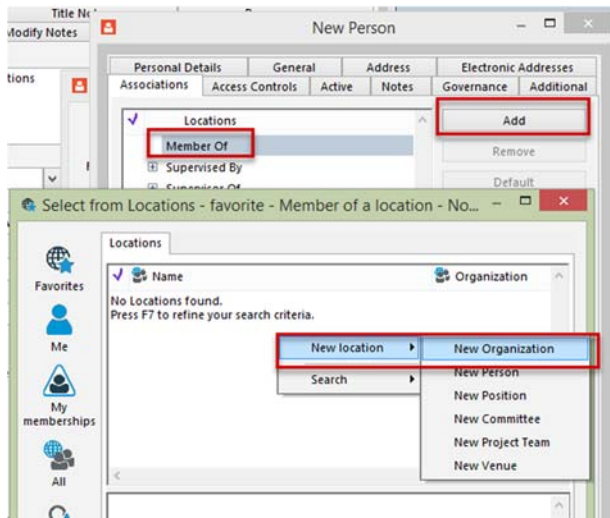


6. Move to the **Electronic Address Tab** for completion of an email address (if known). To enter an email, **right-click > New > Email Address**. Fill out the details in the pop-up and click **OK**.



A contact can be included as a member of the organisation to assist in locating the correct contact to assign as author or addressee of a document.

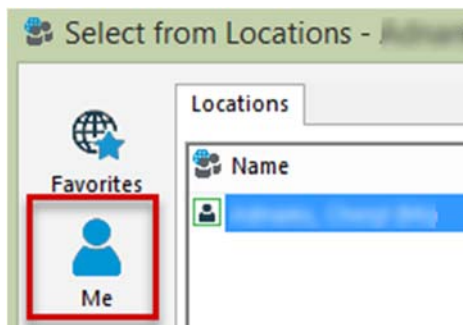
7. To add a contact to an organisation click the **Associations** tab. Under **Member Of**, click **Add**. This will bring up the existing Locations table. Type in the location name (e.g. SA Water). Click **OK** to add the contact and organisation together.



Note: If the organisation is not listed in the existing location table, you can add a new organisation. **Right-click** and select **New location > New organisation**.

8. Click **OK** to complete creation of new external location, then click **OK** to add the newly created location to the document registration form.

Note: To select yourself as the Author or Addressee there is a “Me” button on the Select from Locations screen.



Contact Us

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