Content Manager (CM)

Creating External Locations

This guide will assist in creating **External Locations** in Content Manager (CM). **External Locations** are created so a record is kept in Content Manager as to who may have created, sent, received or is a contact point for a record. People, businesses, organisations, volunteer groups, societies, centres and companies, among others, can be an **External Location**.

There are two main ways to create an **External Location**, within the record that is being created and creating the **External Location** before making the record then searching for it within the record being created.

Before making any **External Location**, run a search to see if the **External Location** or another suitable location already exists.

Searching for an External Location

1. Press **CTRL + L**, this will open a search window.

2. Enter name to search for and click **OK.**
3. A star symbol '*' is a wildcard, for instance, if you type 'Manag*', you will get results such as 'Manager' 'Managers' 'Managerial' 'Management' 'Managing' 'Management and Science University'. If you use the '*' at the start, such as '*Manager', the results will show 'Content Manager' 'Office Manager' 'Store Manager' 'State Manager' 'Office of the Manager'.

4. Run through various search terms and variations. If you are confident no suitable **External Location** currently exists, then create a new **External Location**.

Creating an External Location

1. Press **CTRL + N,** select the **Location** Tab.
2. If you are creating an **External Location** for a person, choose **Person**. For all other location types select **Organization**. Click **OK**.
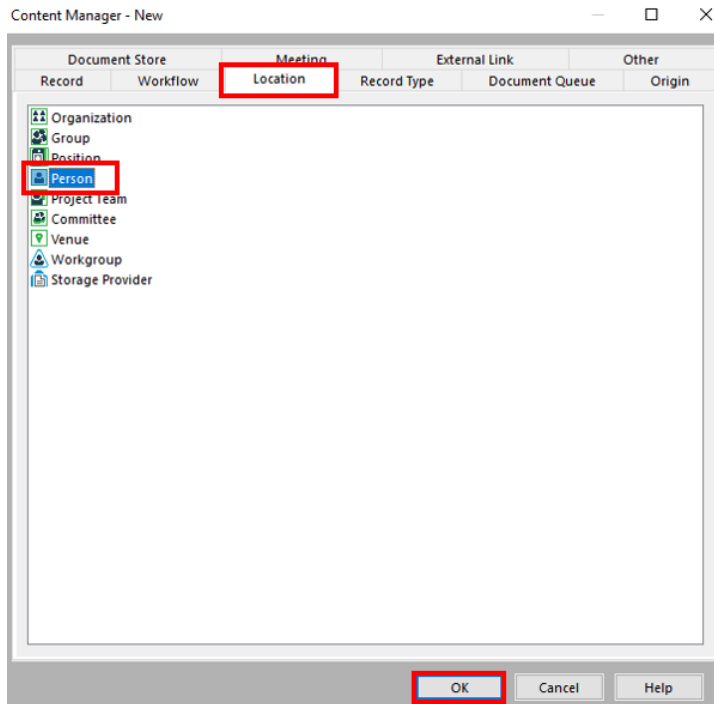
3. Creating an **External Location** is the same for both a **Person** and **Organization**, albeit **Person** has the **Personal Details** Tab extra. We will use **Person** as an example in this guide.
4. **Personal Details** Tab, add the person's first and last name in the required fields. Title is optional but if you want to add, click on arrow and select appropriate title. An organization's title will be entered in the **General** Tab.

5. **General** Tab, if known add the person's email and related phone numbers to the required fields.

6. **Address** Tab, if known, on the **Address Type** field, click on the black arrow to the right and select 'Street' or 'Mailing'.
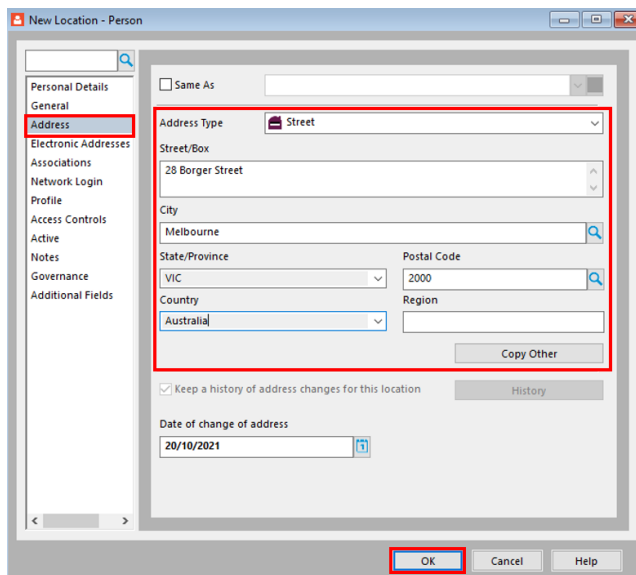
7. The only mandatory field is the name of the **Person** or **Organization**, the other fields are optional. Click **OK**.

8. The **External Location** has been created. If there are mistakes, right click on location and select **Properties**, make edits as required.
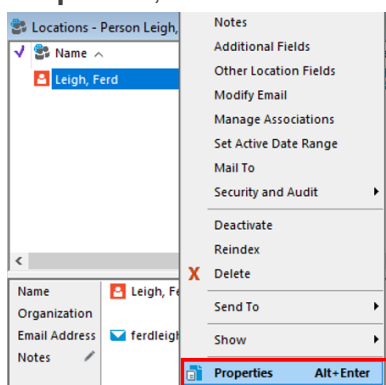

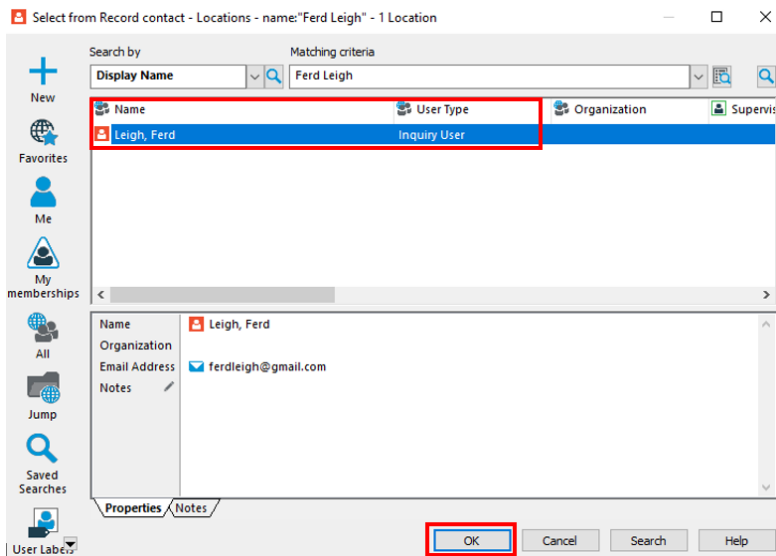**Searching for an External Location within the Record**

1. This example will use the **Document** record as the example, but this will work in other records types as well.

2. The **New Document** window is open. Add **Title** and check **File Number** is correct.

3. In the **Author** field, click the blue magnifying glass to the right.
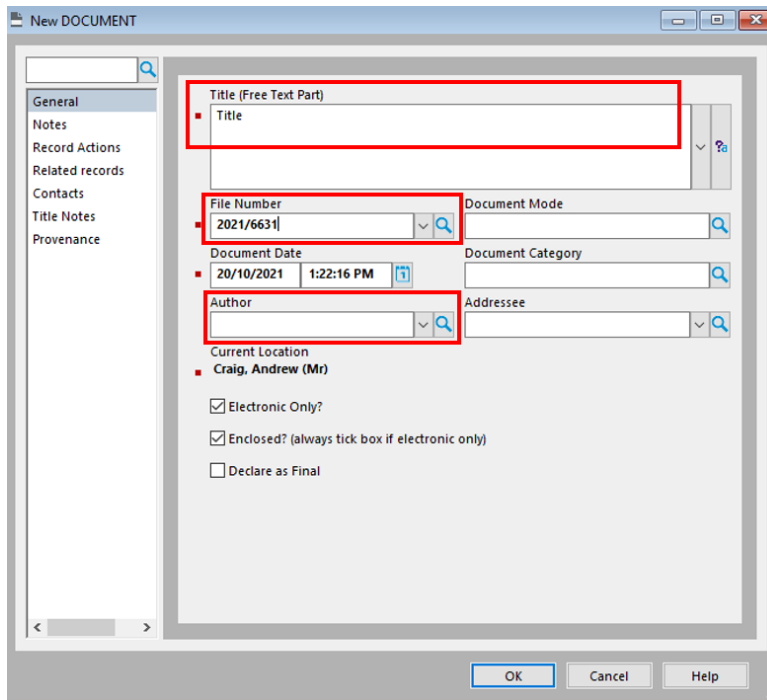
4. A window will open where you can search for locations.
5. Under **Search by** field, select **Display Name**. Under **Matching criteria** enter name to search for and click the blue magnifying glass on the top right.
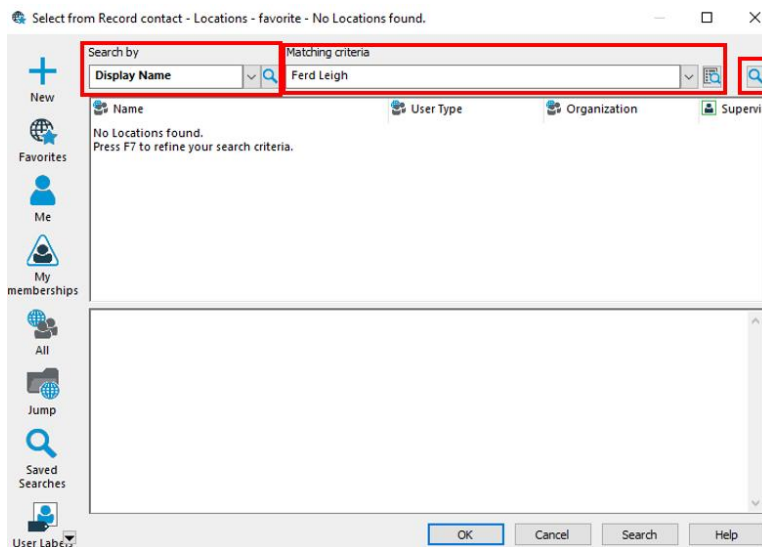
6. A star symbol '*' is a wildcard, for instance, if you type 'Manag*', you will get results such as 'Manager' 'Managers' 'Managerial' 'Management' 'Managing' 'Management and Science University'. If you use the '*' at the start, such as '*Manager', the results will show 'Content Manager' 'Office Manager' 'Store Manager' 'State Manager' 'Office of the Manager'.
7. Run through various search terms and variations. If you are able to locate a suitable **External Location**, highlight and click **OK**.

8. The **Author** field should populate with selected **External Location**.
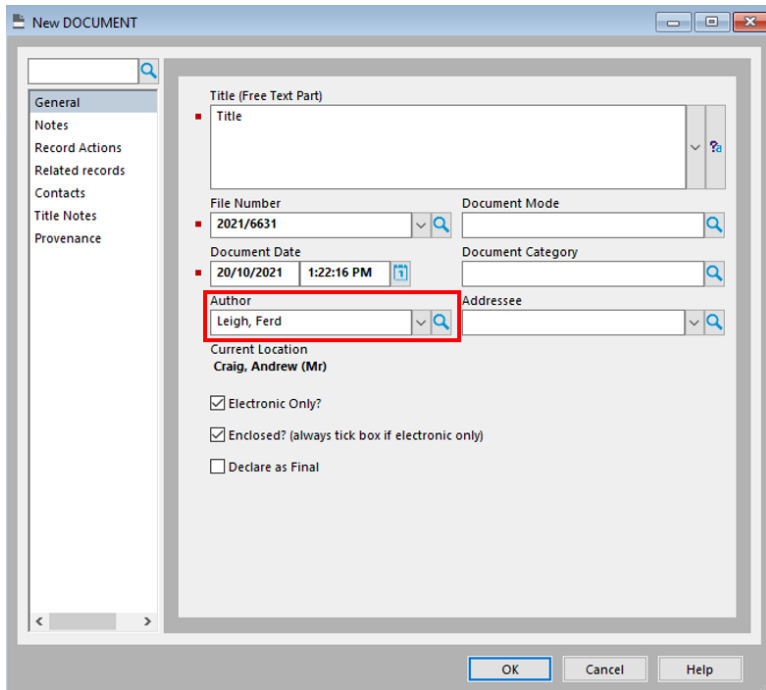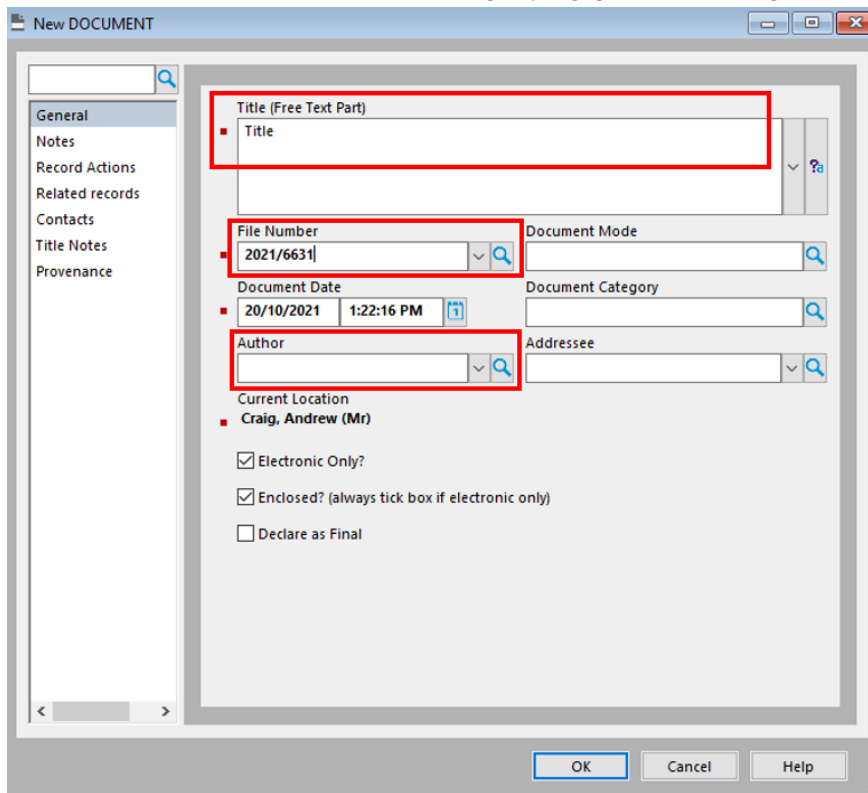

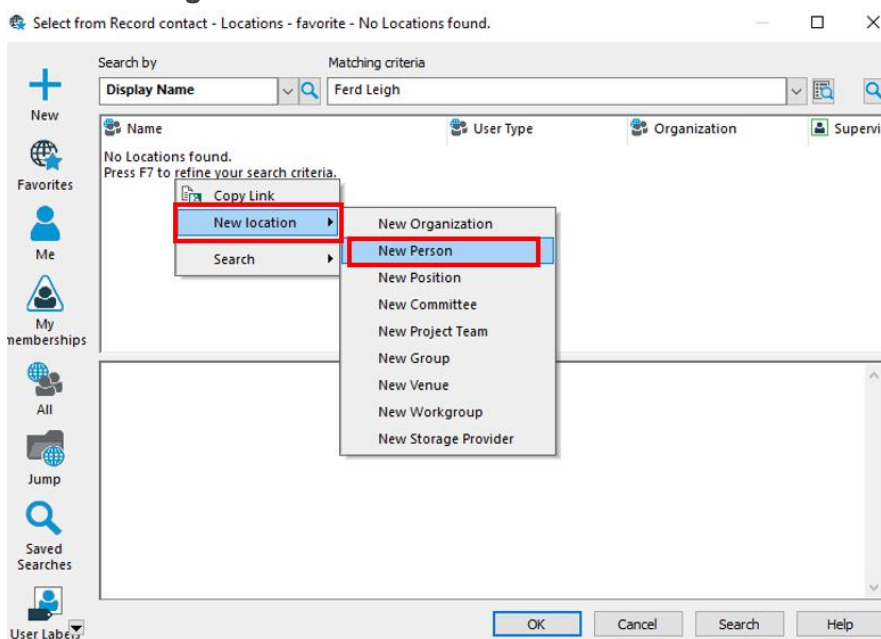9. Click **OK** to create **New Document**.
10. If you are confident no suitable **External Location** currently exists, then create a new **External Location**.

Creating an External Location within a Record

1. This example will use the **Document** record as the example, but this will work in other records types as well.
2. The **New Document** window is open. Add **Title** and check **File Number** is correct.
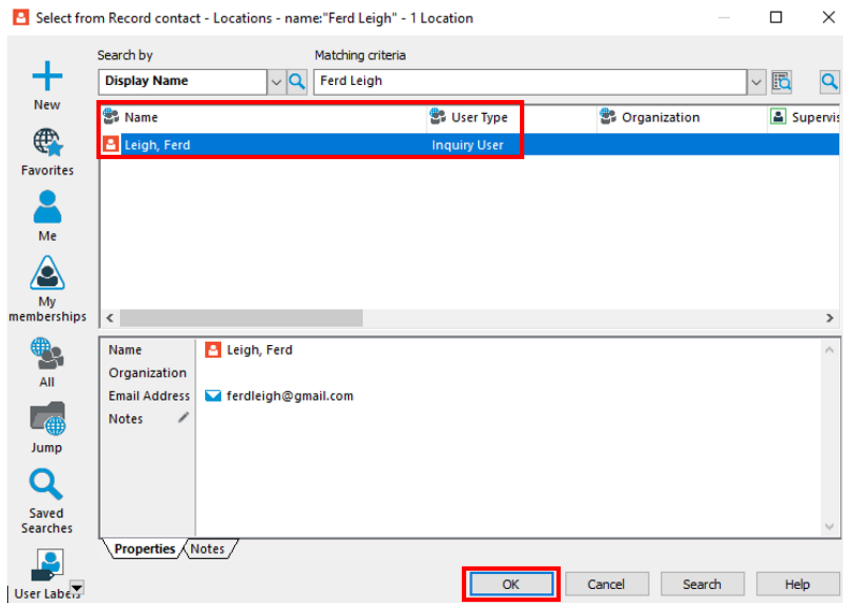3. In the **Author** field, click the blue magnifying glass to the right.

4. Another window will open. Right click in window and select **New Location**, then select either **Person** or **Organisation**.
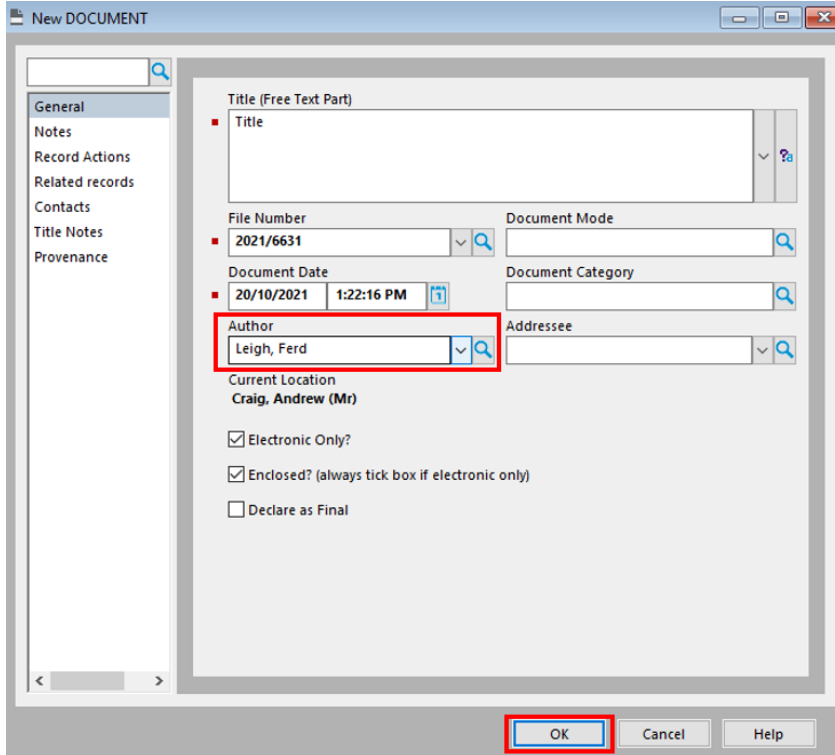

5. Follow steps 4 to 8 in the above **Creating an External Location** process.

6. The new **External Location** should appear in the window.

7. Click **OK** and the author field should auto-populate.

8. Click **OK** to create new record.
9. This new **External Location** now exists and should appear in the location table.

Contact Us

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