



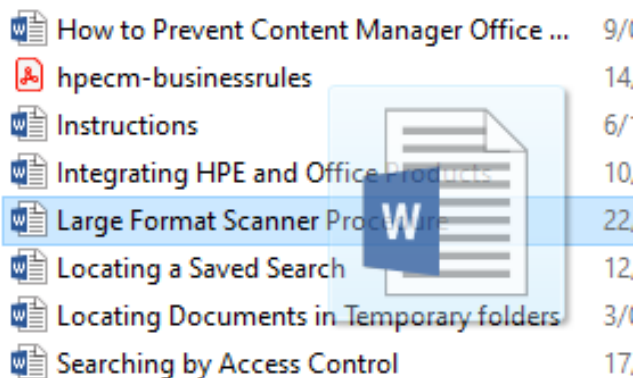
Use Drag and Drop to Capture Documents

This guide will show how to drag an email from Outlook or a document from File Explorer and drop into Content Manager (CM) to create a new record. This guide will show how to drag and drop a single document and how to drag and drop multiple documents (by creating a temporary document queue) into Content Manager

Note: If dragging and dropping from Outlook, this will only apply to the Microsoft Office Outlook program. Accessing Outlook via the web, or web-based products like Gmail, and dragging from that environment may not work resulting in no document being captured in Content Manager.

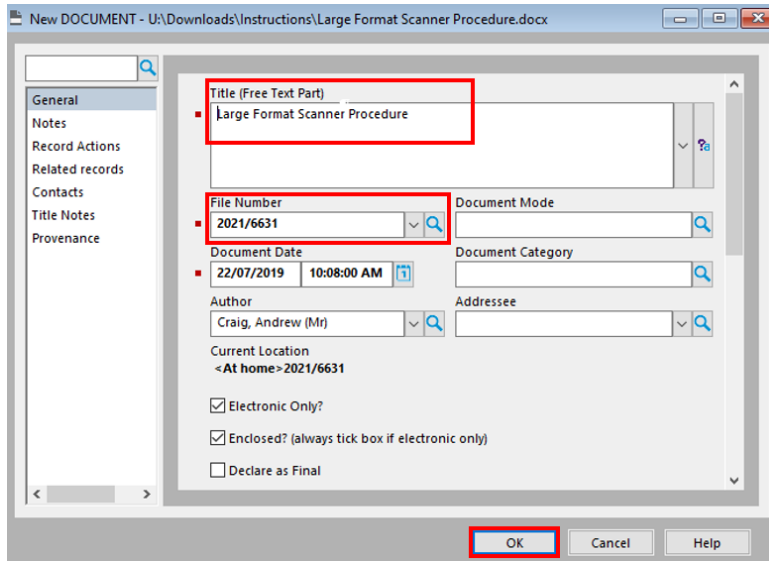
Drag and Drop a Single Document into Content Manager

1. Search for the file you want to add the document to in Content Manager.
2. Click and hold on the document in Outlook or File Explorer then drag over file in Content Manager and let go of mouse click.



3. A **New Document** window will open.
4. Title document as required.

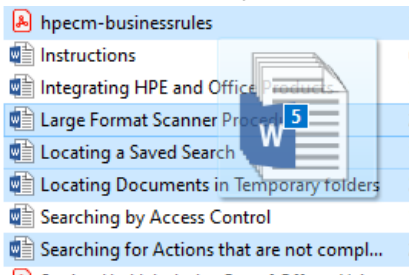
5. Check the **File Number** field has the number of the file you want to add the document to. If the field is blank, enter the file number. If you have accidentally let go of the mouse before dropping onto file, this will result in the file number being left blank.



6. Click **OK**.
7. Document should be created.
8. Follow these steps until all documents have been registered into Content Manager.

Drag and Drop Multiple Documents into Content Manager

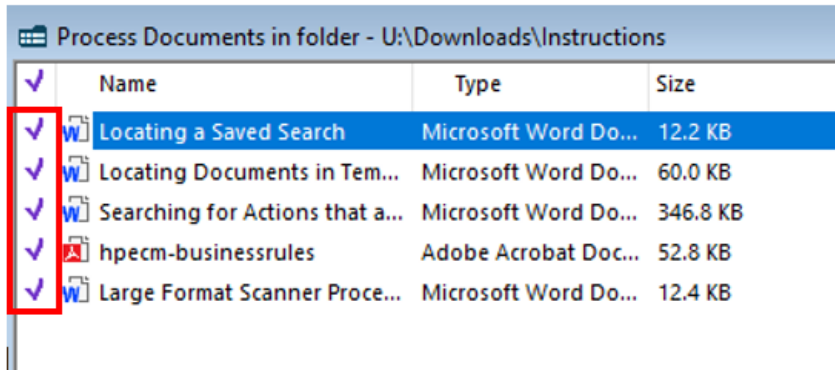
1. When using this method, documents will only be able to be added to one file.
2. Search for the file you want to add the documents to in Content Manager.
3. To select multiple documents in either Outlook or File Explorer, press and hold **CTRL** then click on the documents you want to add to Content Manager.



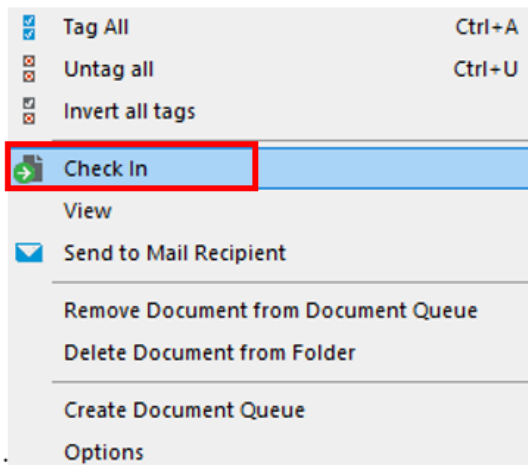
4. Click and hold on a selected highlighted document in Outlook or File Explorer then drag over file in Content Manager and let go of mouse click.
5. A document queue window will open.

Process Documents in folder - U:\Downloads\Instructions					
	Name	Type	Size	Date	Status
✓	Locating a Saved Search	Microsoft Word Do...	12.2 KB	12/03/2021 at 10:32 AM	Draft
	Locating Documents in Tem...	Microsoft Word Do...	60.0 KB	03/07/2020 at 1:38 PM	Draft
	Searching for Actions that a...	Microsoft Word Do...	346.8 KB	29/03/2019 at 4:06 PM	Draft
	hpecm-businessrules	Adobe Acrobat Doc...	52.8 KB	14/03/2019 at 10:06 AM	Draft
	Large Format Scanner Proce...	Microsoft Word Do...	12.4 KB	22/07/2019 at 10:11 AM	Draft

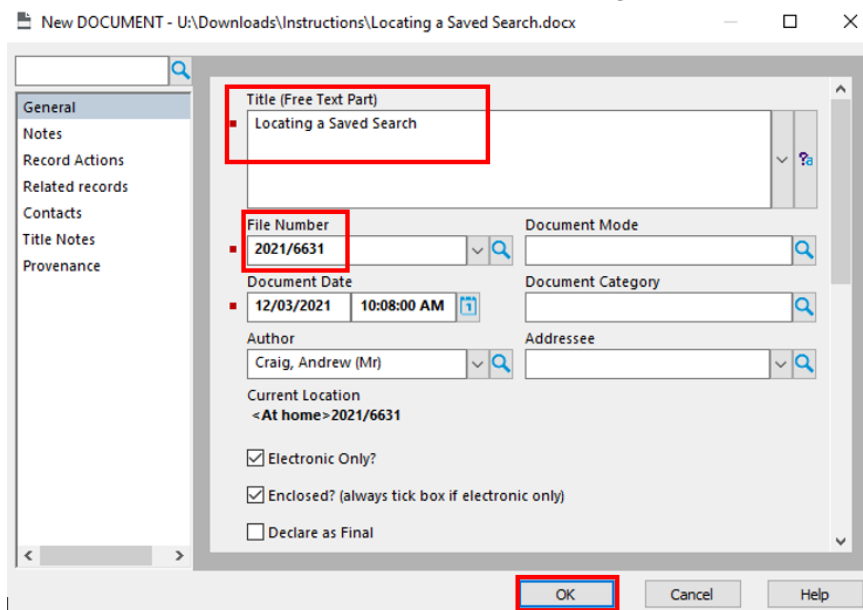
6. Press **CTRL + A** to highlight all the documents in the queue. A tick will appear next to the documents.



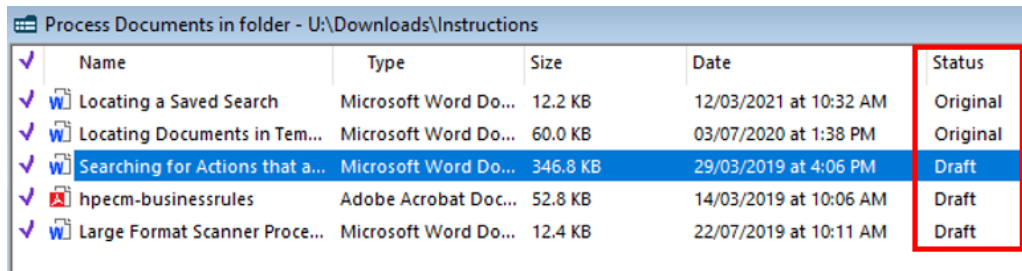
7. Right click and select **Check In**.



8. A New Document window will open where you can edit the title as required. Check the file number is correct. Click **OK** for document to register.



9. When a document is registered, the **Status** column will change from 'Draft' to 'Original'.

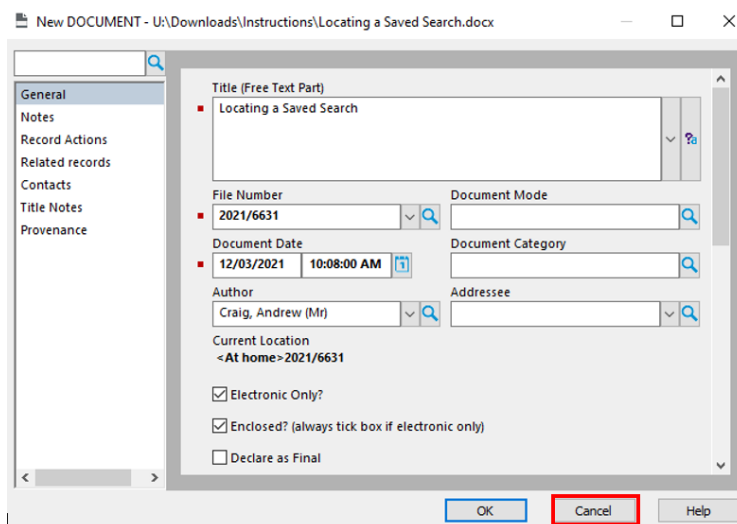


Name	Type	Size	Date	Status
Locating a Saved Search	Microsoft Word Do...	12.2 KB	12/03/2021 at 10:32 AM	Original
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hpecm-businessrules	Adobe Acrobat Doc...	52.8 KB	14/03/2019 at 10:06 AM	Draft
Large Format Scanner Proce...	Microsoft Word Do...	12.4 KB	22/07/2019 at 10:11 AM	Draft

10. Another New Document window will appear for the next document in the queue.

11. This process will repeat until all documents have been registered in Content Manager.

12. If you need to stop this process part way through, when a New Document window appears, click on **Cancel**.



New DOCUMENT - U:\Downloads\Instructions\Locating a Saved Search.docx

General

Title (Free Text Part)

Locating a Saved Search

File Number: 2021/6631

Document Mode: []

Document Date: 12/03/2021 10:08:00 AM

Document Category: []

Author: Craig, Andrew (Mr)

Addressee: []

Current Location: <At home>2021/6631

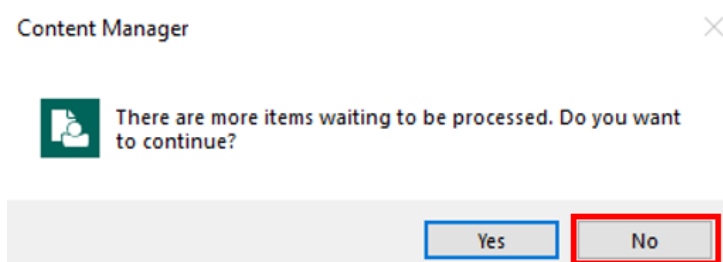
Electronic Only?

Enclosed? (always tick box if electronic only)

Declare as Final

OK Cancel Help

13. Another window will appear, select **No** to stop registering documents.



Content Manager

There are more items waiting to be processed. Do you want to continue?

Yes No

Contact Us

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