

## 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 accidently let go of the mouse before dropping onto file, this will result in the file number being left blank.

General         Notes         Record Actions         Related records         Contacts         Title (Free Text Part)         Provenance         Document Date         Document Category         222/07/2019         10:08:00 AM         Author         Addressee         Craig, Andrew (Mr)         Current Location <at home="">2021/6631         Electronic Only?         Enclosed? (always tick box if electronic only)         Declare as Final</at>	New DOCUMENT - U:\Down	nloads\Instructions\Large Format Scanner Procedure.docx
File Number     Document Mode       Provenance     2021/6631       Document Date     Document Category       1     22/207/2019       10:08:00 AM     Author       Author     Addressee       Craig, Andrew (Mr)     Q       Current Location <at home="">2021/6631       Image: Electronic Only?     Electronic Only?       Image: Enclosed? (always tick box if electronic only)</at>	General Notes Record Actions Related records	Title (Free Text Part) karge Format Scanner Procedure
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< > OK Cancel Help	< >	

- 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.

1	Name	Туре	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.

✓ Name Type Size					
1	🖬 Locating a Saved Search	Microsoft Word Do	12.2 KB		
	🕷 Locating Documents in Tem				
V	🕷 Searching for Actions that a	Microsoft Word Do	346.8 KB		
V	🔊 hpecm-businessrules	Adobe Acrobat Doc	52.8 KB		
1	🔊 Large Format Scanner Proce	Microsoft Word Do	12.4 KB		

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

<b>√</b>	Tag All		Ctrl+A
	Untag all		Ctrl+U
	Invert all tags		
đ	Check In		
	View		
	Send to Mail Recipie	nt	
	Remove Document fr	om Document Qu	eue
	Delete Document from Folder		
	Create Document Qu	eue	
	Options		
		leue	

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.

New DOCUMENT - U:\E	Downloads\Instructions\Locating a Saved Search.docx		$\times$
General Notes Record Actions Related records Contacts Title Notes Provenance	Title (Free Text Part)         Locating a Saved Search         File Number       Document Mode         2021/6631       Image: Comparison of the second seco	<ul> <li>✓ %</li> <li>Q</li> <li>Q</li> <li>✓ Q</li> </ul>	~
	OK Cancel	Help	,

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

1	Name	Туре	Size	Date	Status
V	🕷 Locating a Saved Search	Microsoft Word Do	12.2 KB	12/03/2021 at 10:32 AM	Original
V	🕷 Locating Documents in Tem	Microsoft Word Do	60.0 KB	03/07/2020 at 1:38 PM	Original
1	Searching for Actions that a	Microsoft Word Do	346.8 KB	29/03/2019 at 4:06 PM	Draft
V	hpecm-businessrules	Adobe Acrobat Doc	52.8 KB	14/03/2019 at 10:06 AM	Draft
1	😡 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**.

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New DOCUMENT - U:\E	Oownloads\Instructions\Locating a Saved Search.docx —		×
General Notes Record Actions Related records Contacts Title Notes	Title (Free Text Part)       Locating a Saved Search       File Number       2021/6631	~ %	^
Provenance	Document Date     Document Category       12/03/2021     10:08:00 AM     Addressee       Author     Addressee     Carlag, Andrew (Mr)       Current Location <at home="">2021/6631       ✓ Electronic Only?     ✓ Enclosed? (always tick box if electronic only)       Declare as Final</at>	<b>Q</b> ]√ <b>Q</b>	~
< >			
	OK Cancel	Help	2

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



## **Contact Us**

Content Manager

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