

Content Manager (CM)

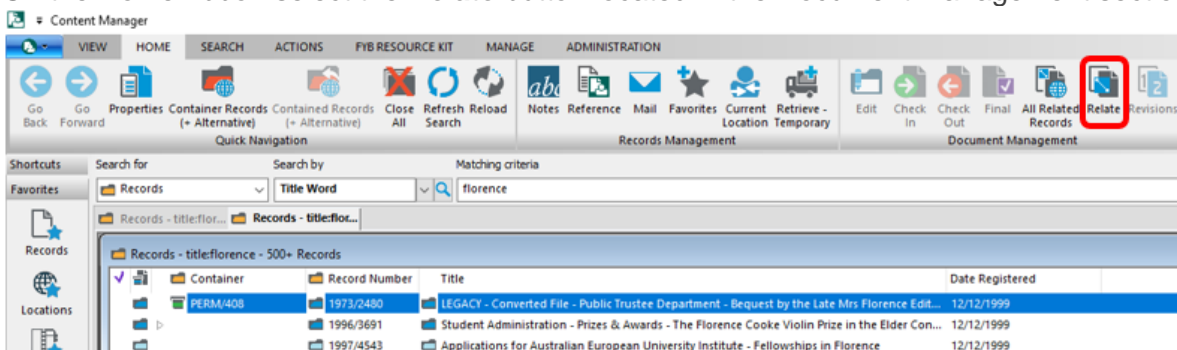
Relating Records

1. Introduction

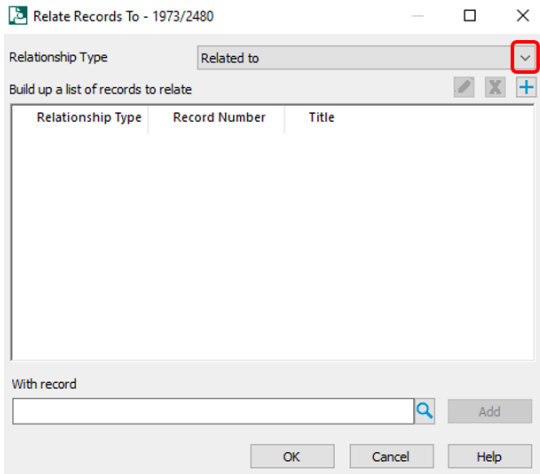
Files and documents may be related to other files and/or documents to remove the need to save a document in two or more places. For example, you can link documents that relate, such as Minutes and Agendas.

2. Procedure

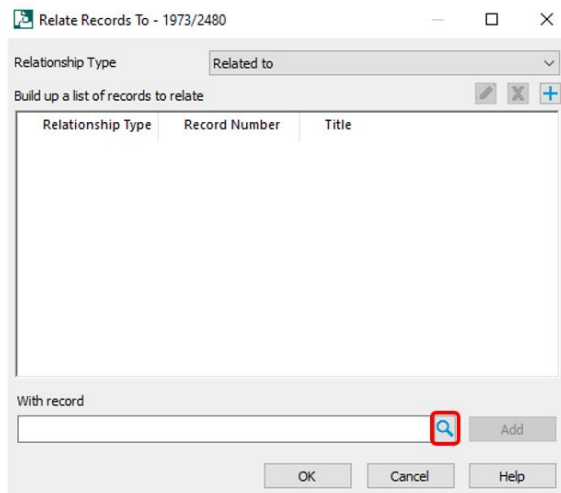
1. Locate the document or file you wish to relate to another file or document and click on the title to select it (it will highlight blue when selected).
2. On the Home ribbon select the **Relate** button located in the Document Management section.



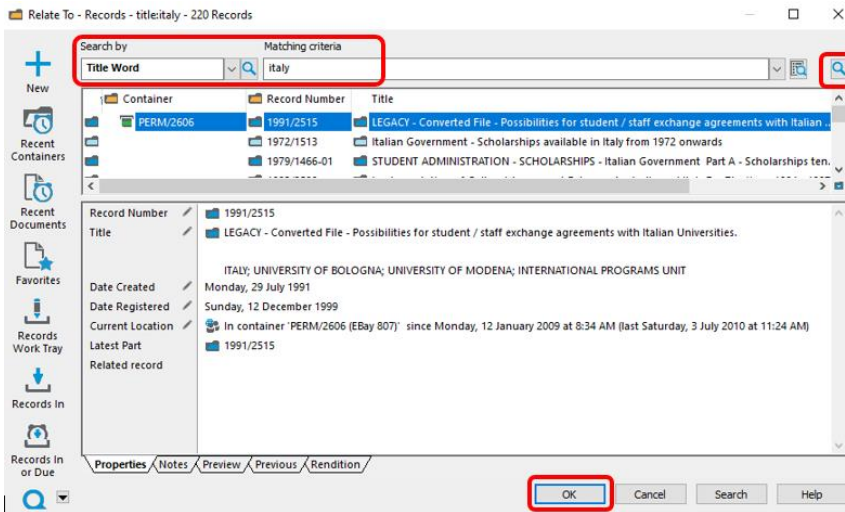
3. When the **Relate Records To** dialog box appears, select the Relationship Type from the drop-down menu.



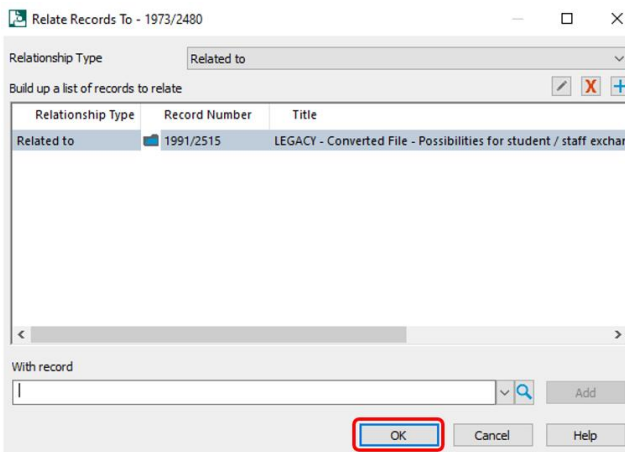
4. Then, in the **With Record** field, provide the record number of the file or document you want to relate to the one you have selected. There are two ways to do this:
- If you know the record number, simply type the record number into the With Record field (recent records will show in the drop-down box). Then click **Add**. (**Proceed to Step 5**).
 - If you don't know the record number, select the blue search icon to search for the record using other criteria.



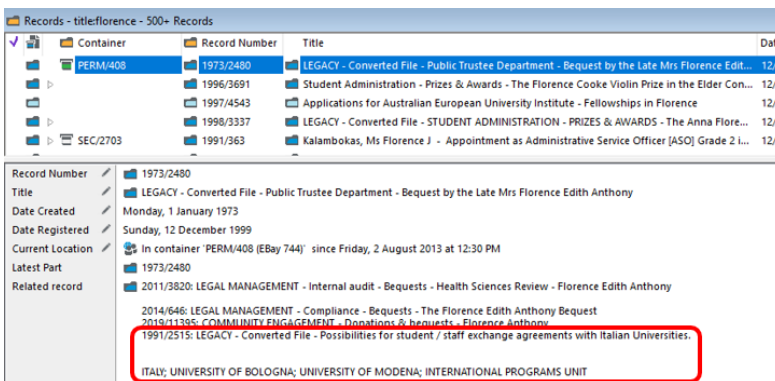
5. Enter the data you wish to search by and click on the magnifying glass icon to the right. Highlight the file you want to relate and click **OK**.



6. You can continue to add or search for more records to relate by repeating steps 4b and 5. When completed Click **OK**.



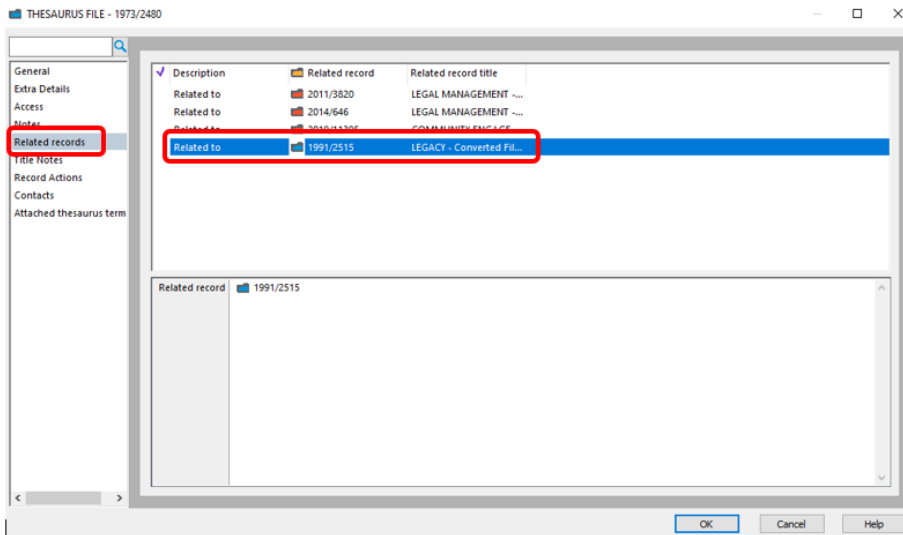
7. Related records show in the Properties field.



3. To remove relationships between documents or files

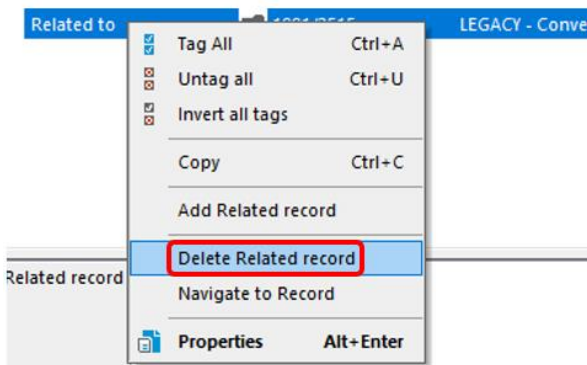
1. Search for and select one of the records you wish to remove the relationship from.
2. Click the **Properties** icon on the **Home** ribbon.

3. Go to the **Related Records** tab.

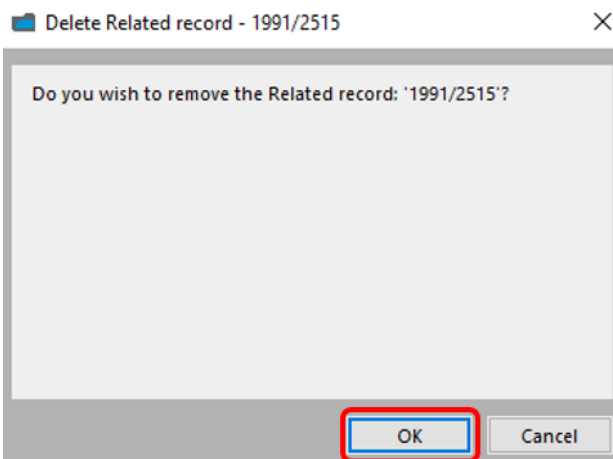


4. Highlight file you wish to remove.

5. Right click on the document/file you wish to remove the relation from.

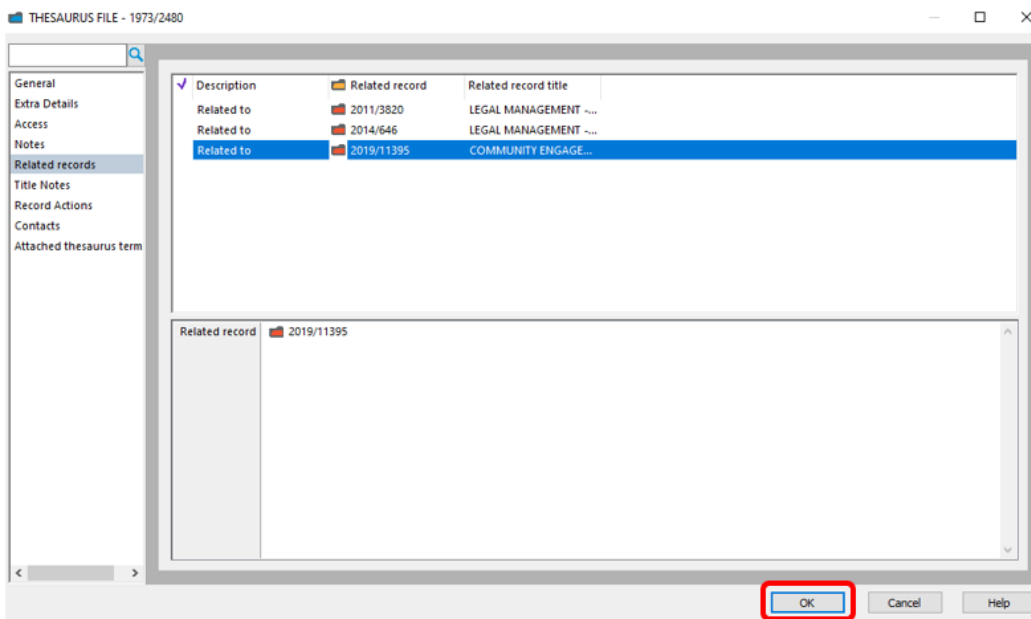


6. From the menu select **Delete Related record**.



7. Click **OK**.

8. Record should be removed.



9. Click **OK** again to go back to file view.

4. 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