



Content Manager (CM)

Web Client - Saving Records into Content Manager

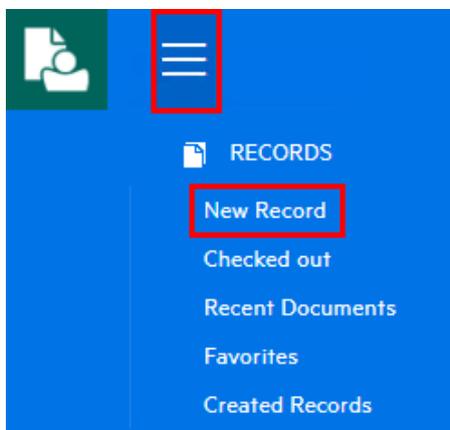
Introduction

The Content Manager Web Client allows you to connect to the University's records system using a web browser. It offers a streamlined interface that includes the most frequently used Content Manager features.

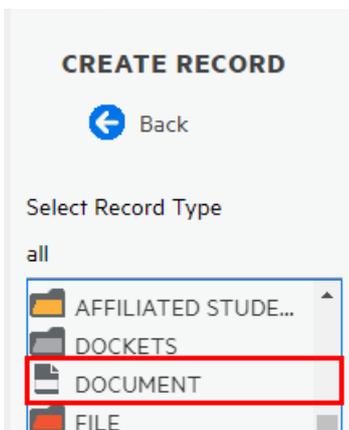
Note: Chrome and Firefox are recommended browsers. Internet Explorer may not provide an optimal user experience with the Web Client.

Procedure

1. Click the **Menu** button at the top left side of screen and click **New Record**.



2. In the Select Record Type dropdown choose **Document**.



The document registration entry form will display.

CREATE RECORD

 Back

Select Record Type

 DOCUMENT

GENERAL

Title (Free Text Part) *

File Number *

< Enter Search Query > 

Document Mode

< Enter Search Query > 

Document Date *

11/11/2021 01:13:00 PM 

Document Category

< Enter Search Query > 

Author

< Enter Search Query > + 

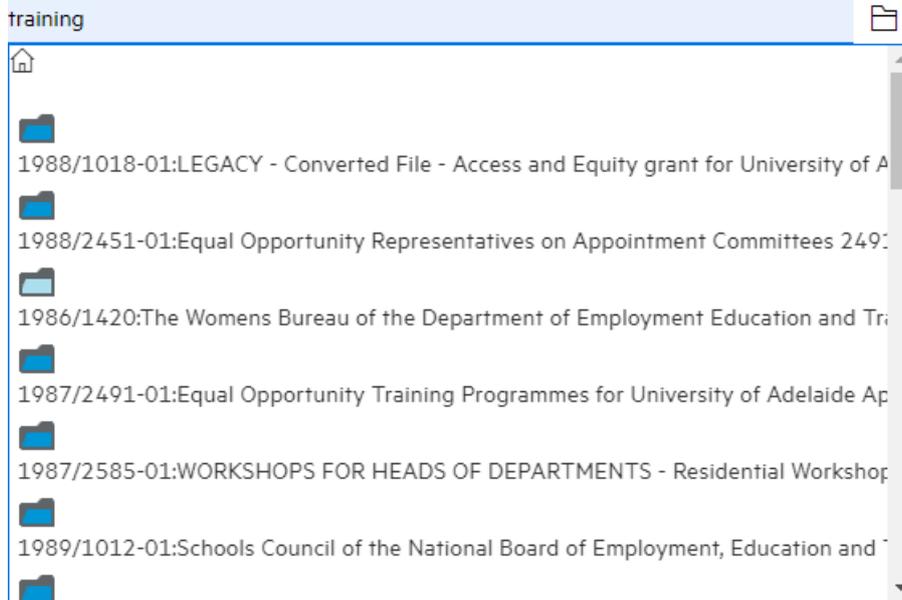
Addressee

3. Complete the Document Registration Form. You will need to scroll down to see the rest of the Document Registration Form fields.

Note: Ensure the Content Manager Business Rules and naming standards are followed and Mandatory fields* are completed.

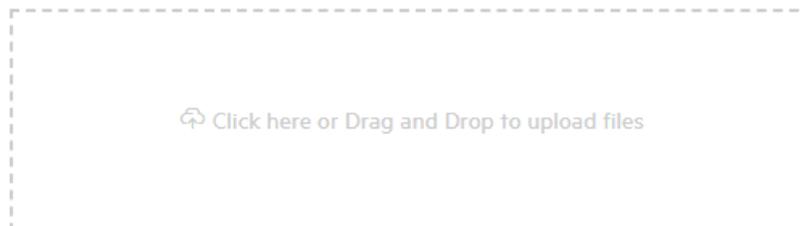
4. In the **File Number** field, if you know the Content Manager file number you can type it directly into this field. Otherwise, use keywords to help locate the file.

File Number *



5. To upload the document:
- Open a **Windows Explorer** window, locate the document and **drag and drop** into the Attach electronic document box,
- OR
- **Click in the box** (this will open Windows Explorer), **navigate** to your document, select it and then click **Open**.

Attach electronic document



6. Once the document is attached, click **Save**.

Note: Emails cannot be dragged and dropped out of Outlook into Content Manager via the Web Client. You must first save the email to the desktop or Windows Explorer Folder.

Contact Us

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