

## Adults Quick Guide

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### File Locations

To access the **File locations** screen click **File management > File location** within the extended sidebar menu of the person's record.

The **File locations** screen allows you to view, record and manage the location details of paper files.

This section also allows for the temporary and permanent movements of those files to be recorded.

The **File locations** screen will automatically display the current location of any files.

Historic file locations can also be displayed on the screen by clicking the **Show History** button.

Current locations have no end ('To') date but any closed/historic files will have a 'To' date recorded.

Historic file locations can be hidden again by clicking the **Hide History** button

### To Record a File Location

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Click the **Add** button at the bottom of the **File locations** screen

The **Add file location** screen displays.

Complete the fields on the screen as appropriate.

**Note** - The **'Primary location?'** checkbox should be selected if the location being recorded is the 'normal' location of the file.

The **'Details'** textbox should be used to record specific file details e.g. how many files, what type of files, location details (i.e. which cabinet, room or which person has the file), box number if offsite, etc.

Click the **Save** button to record the details and return to the **File locations** screen.

Click the **OK** button to return to the **Person summary** screen – note file location information does not display on the **Person summary** screen (there is no '**File locations**' section).

## To Record a File Movement

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A file movement should be recorded if a file moves location.

This process is the same for both permanent and temporary file movements.

On the **File locations** screen click the **Removal Lorry** icon  against the file which is moving.

The **Move file location** screen displays.

Complete the fields and then click the **Save** button.

The previous location will automatically be ended with the start date of this new location. This will not display on the **File locations** screen but can be viewed by clicking the '**Show History**' button.

When recording a file movement you will need to edit the '**Details**' textbox with the new location details.

From the **File locations** screen click the **Edit Pencil** icon 


The **Amend file location** screen displays.

Update the information record within the 'Details' field. Add details of movement to make it easier to track the file and then click the **save** button

## Editing File Locations

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With the exception of file movements, you should only edit a file location when a recording error has been made e.g. incorrect location or location details have been recorded.

On the **File locations** screen click the **Edit Pencil** icon  against the file location which needs editing

The **Amend file location** screen displays.

Update the incorrect information and click the **Save** button.