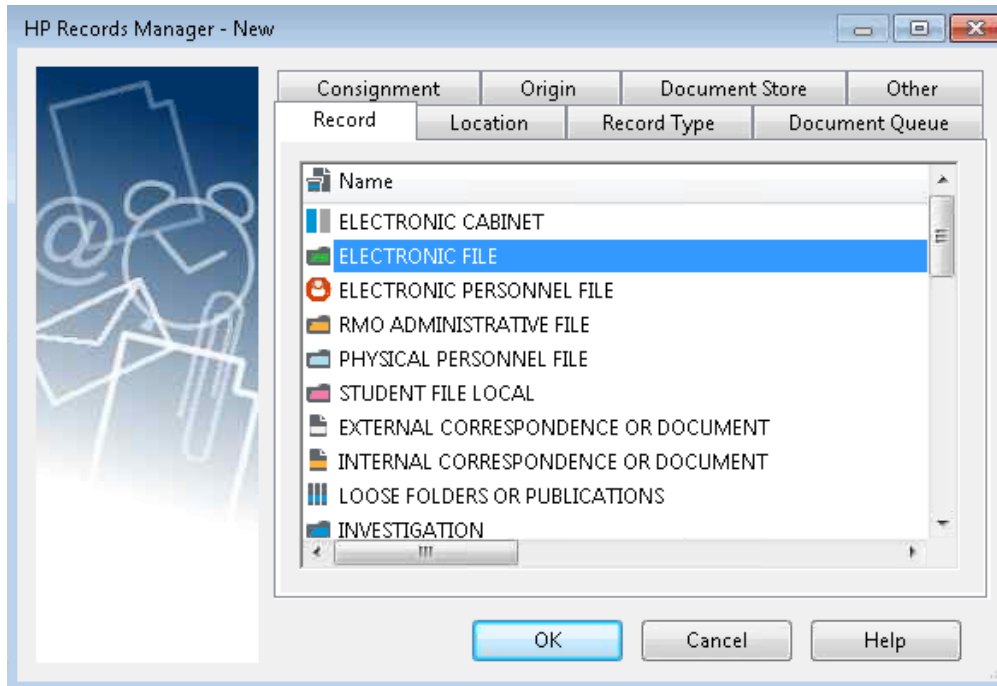


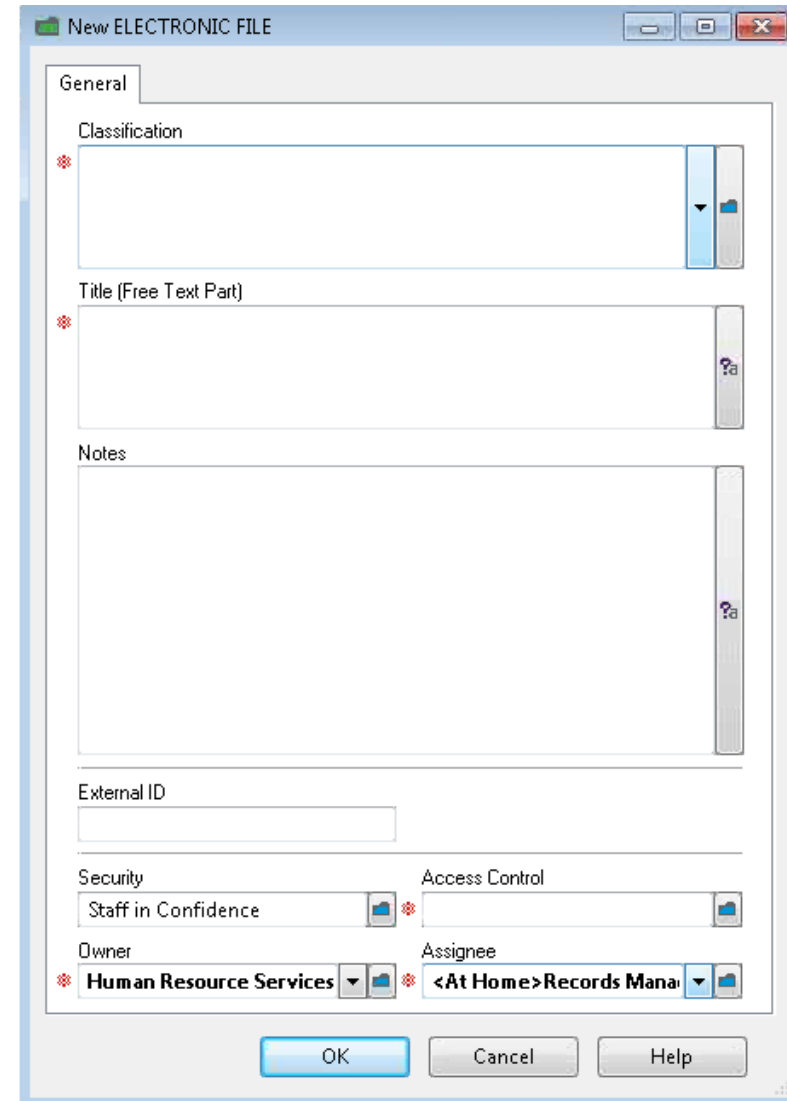
Creating a File or Sub Folder


Note! Search HPE Records Manager to ensure a File/Sub Folder of the same name **doesn't already exist**. If the File can't be found, create a new HP Records Manager File/Sub Folder.

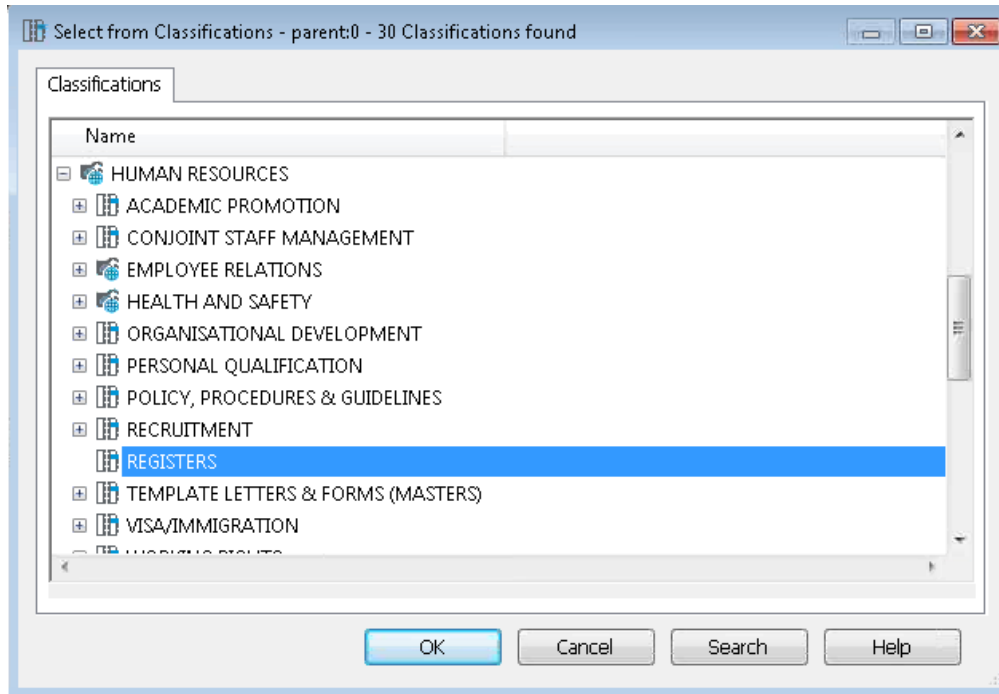
1. Select **New** from the **HPE Records Manager** toolbar.
2. In the **New HPE Records Manager** window select the appropriate **Record Type** (e.g. File/ Sub Folder) and select **OK**.





3. The **New Record** screen will appear. Complete all relevant fields. Those marked with a * (red asterisk) must be completed.




- To Choose a Classification select the blue KwikSelect button  to search or navigate to the correct Classification. Once found, **highlight the Classification** and select **OK**.

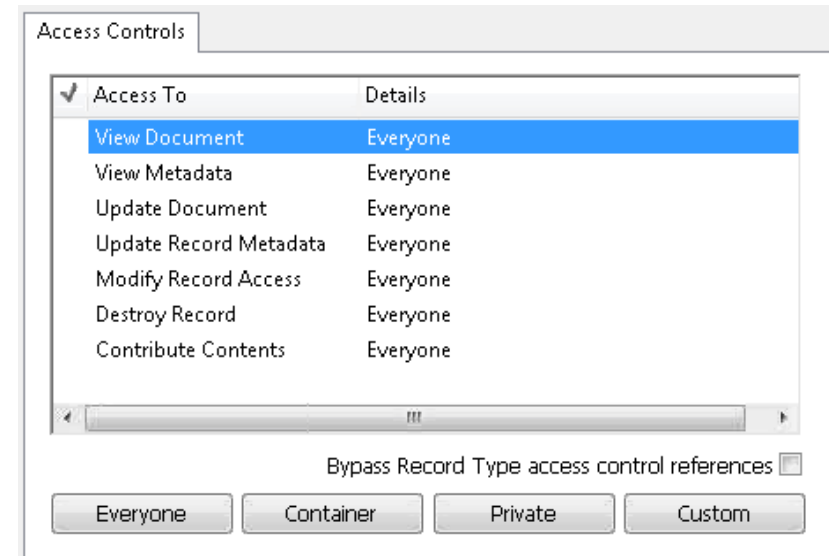


Note! Use the plus  and minus  buttons to expand the Business Classification Scheme and find the appropriate Classification for the File.

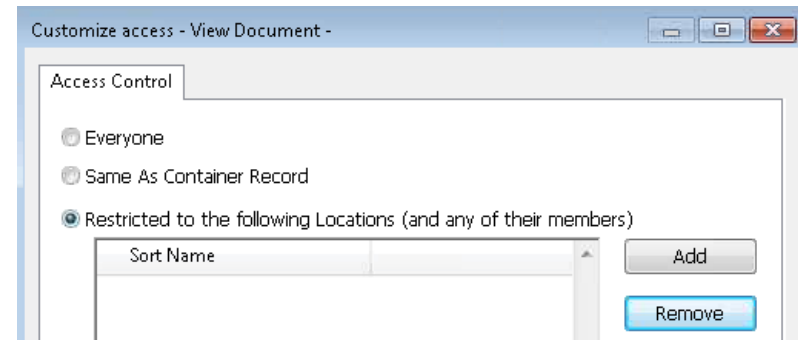
- Title (Free Text Part):** Enter a Title using **University of Newcastle File naming guidelines**.
Note! If access controls need to be applied do this to the File/Sub Folder before selecting **OK** to save.
- When all of the information has been completed, select **OK**.

Adding Access Controls to Files



- To change the access controls on a Files, select the **Access Control** blue KwikSelect button. 
- Select the Assess Controls that need to be modified.



- Once tagged, select **Custom**. In the Custom Access window select **Restricted to the following Locations (and any of their members)**.



- Select **Add** to add **Access Control Groups** to the list.

Note! When selecting Locations to allow Record access, select a Green Organisation  under **Access Control Groups**. Do not select a Person . If a group does not exist please contact your Administrator.

- Select **OK** to confirm changes.