Tip 022: Moving Documents to Another Folder

Primary Audience: Information Workers
Purpose: You can easily move electronic documents from one e-folder to another.

See below for a Quick Method.

To move a document:
1. Search for and tag the documents you want to move.
2. Right click on the tagged document(s), select Locations and then Container (Folder/Box).
3. On the Record Container (Folder/Box) – All tagged Records popup, in the Set container To field:
   a. Click the blue folder icon and search for and select the folder to which you want to move the documents, OR
   b. Click the dropdown to display recently used folders and select one.
   c. Click OK.

4. On the Record Container (Folder/Box) – All tagged Records popup, click Yes to All.

The records will be moved to the new folder.
Alternative (Quick) method:
1. You can also navigate to the folder where you want to move the record(s).
2. Copy its record number.
3. Select the record you want to move (tag multiple records if required).
4. Right click and select Locations.
5. On the Record Container popup, paste the copied record number in the Set container (folder/box) To field.
6. Click OK.