

Move or download a record

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Records can move between folders as your filing changes, and you can download a copy whenever you need one. A record keeps its own name, so if one needs a different name, file it again under the right one.

1 Move one record

In **Files**, open the record's **?** menu and choose **Move to...**. Pick the folder, choose a reason, add a few words about why, and click **Move 1 document**.

2 Move several at once

Tick the boxes next to the records, up to 100, and click **Move to...** in the bar that appears. You'll see what happened to each one when it's done.

3 Download a copy

Choose **Download** from the record's **?** menu, or open the record and click **Download**. If a reason is needed, you'll be asked for one first.

4 Give a reason if asked

On **Why are you opening this?**, choose a reason, add details if you like, and click **Continue**. Your reason covers that folder for a short while, so you won't be asked again for each record. Click **End reason** when you're done.

Records in the archive

An **ARCHIVED** record has to be restored before you can open or download it. Open it, click **Restore it**, choose how soon you need it and how many days to keep it open, then click **Ask for it**. The record shows when it should be ready.

When a move waits

Moving a record out of a protected folder waits for a second person to approve it in **Approvals**, and a record under a legal hold can't be moved until the hold is released.

If something goes wrong

There's no **Download** option.

You may not have permission to open documents. Ask an admin in your organisation to give it to you.