



INSTITUTES MANAGEMENT

Achiever contains a user-configurable address book, which stores institutes, addresses and contact names. These names must be used when checking-out samples externally, or creating studies within collections.

NB

- Names may only be added to an existing Address record
- Address records may only be added to an existing Institute record
- Therefore users may need to create up to 3 records (institute, address, contact) initially
- All users share the same Institutes list, so search for the record before adding a new one

Institutes

CREATING AN INSTITUTE RECORD

• Navigate to the Institutes

functional menu

- Ensure the Institutes area menu is selected
- From the Institutes records grid, open the 'Insert new Institute' workflow
- In the resulting form, only the Institute name field is mandatory

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Workflow 🔻		Institute:
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Institute Information		
Institute		
Responsibility of Classification		
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CREATING AN ADDRESS RECORD

• Navigate to the Institutes

Institutes

functional menu

- Ensure the Institutes area menu is selected, and search/open an Institute record
- Within the Addresses navigation menu, select the 'Insert New Address' workflow item from the records grid
- Only Line 1 is mandatory, this could be a department name for example





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Line 1					-
Line 2					
Line 3					
Town					
County					
Postcode					
Country	United Kingdom				
Switchboard					
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CREATING A CONTACT RECORD

Navigate to the Institutes

functional menu

• Ensure the Institutes area menu is selected, and search/open an Institute record

Institutes

- Within the Addresses navigation menu, search/open an Address record
- Select the Contacts navigation menu, then select the 'Insert New Contact' workflow item from the records grid
- Surname and email address are mandatory fields.

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🔊 First Name		Surname	Institute	8	
			Address	Ŧ	
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		First Name First Name Constraints Const	First Name Surname Image: Control of the second		First Name Institute Address