


## INSTITUTES MANAGEMENT

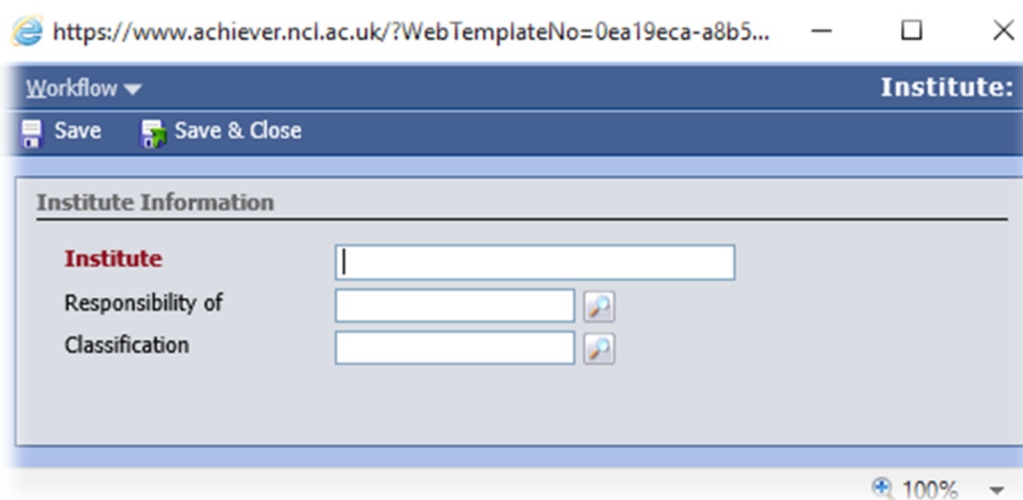
Achiever contains a user-configurable address book, which stores institutes, addresses and contact names. These names must be used when checking-out samples externally, or creating studies within collections.

### 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

## CREATING AN INSTITUTE RECORD

- Navigate to the Institutes  **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



Workflow ▾ Institute:

Save Save & Close

**Institute Information**


**Institute**

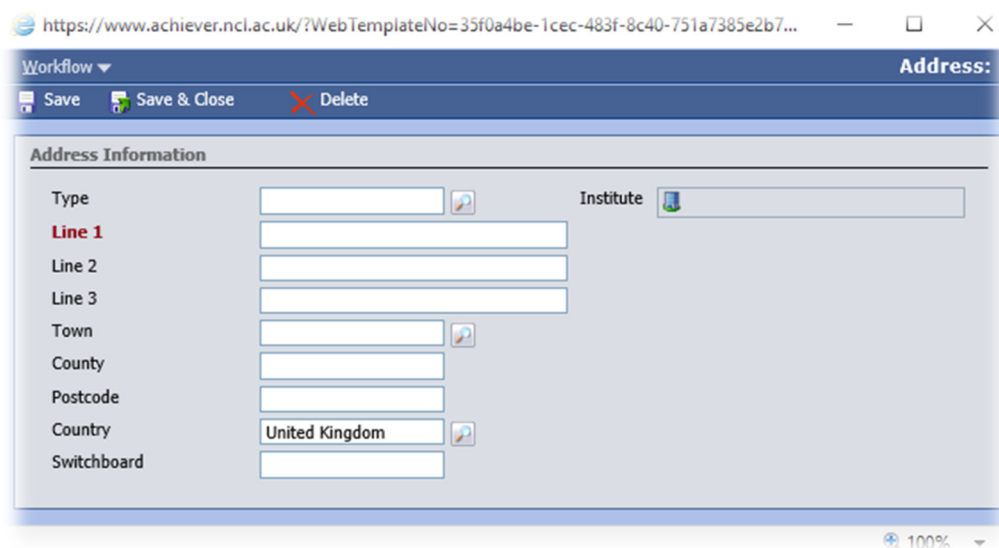
Responsibility of

Classification


100%

## 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



## CREATING A CONTACT 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, 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.

