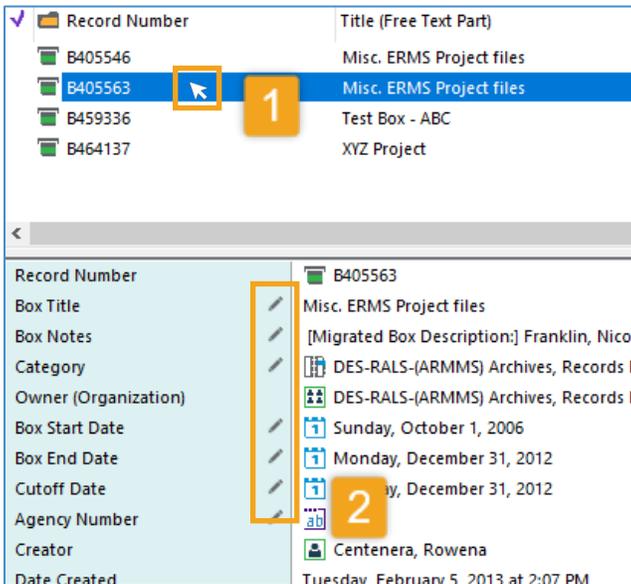




Content Manager Guidance

Edit a Box

This is guidance for how to **Edit a Box** in Content Manager.



To edit **one box**:

1. **Left click** on a box to edit
Refer to separate guidance on how to search for boxes
2. Scroll down to the details plane and click the **pencil icon** to edit any field you have access to
3. Follow prompts as directed.

From this process, you can edit the **Title, Notes, Category, or Cutoff Date** of any box you have access to.

To edit more than one box at a time, go to the next page.

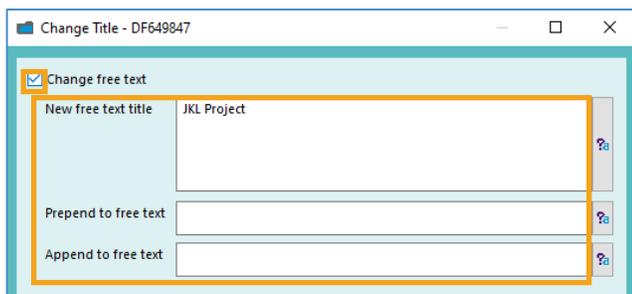
For other edits, contact the Records Management Program.

[continued next page]

Editing Titles Pro Tip!

Check “**Change free text**”, then choose from three options:

- A. To **change the title** to something else, erase the title and enter the new one in “**New free text title**”
- B. To **add something to the beginning** of the existing title, choose “**Prepend to free text**”
- C. To **add something to the end** of the existing title, choose “**Append to free text**”





Content Manager Guidance

Edit a Box

Record Number	Title (Free Text Part)
B405546	Misc. ERMS Project files
B405563	Misc. ERMS Project files
B459336	Test Box - ABC
B464137	XYZ Project

Title:

Reject From Consignment	Reject From Consignment	Reject From Consignment	Reject From Consignment
Details	Title	Details	Title
Security and Audit	Notes	Security and Audit	Notes
Locations	Dates	Locations	Dates
Requests	Category	Requests	Category

Notes:

Reject From Consignment	Reject From Consignment	Reject From Consignment	Reject From Consignment
Details	Title	Details	Title
Security and Audit	Notes	Security and Audit	Notes
Locations	Dates	Locations	Dates
Requests	Category	Requests	Category
Workflow	Record Class	Workflow	Record Class

Category:

Reject From Consignment	Reject From Consignment	Reject From Consignment	Reject From Consignment
Details	Title	Details	Title
Security and Audit	Notes	Security and Audit	Notes
Locations	Dates	Locations	Dates
Requests	Category	Requests	Category
Workflow	Record Class	Workflow	Record Class

Cutoff Date, Box Start Date, Box End Date, or Agency Number:

Reject From Consignment	Reject From Consignment	Reject From Consignment	Reject From Consignment
Details	Title	Details	Title
Security and Audit	Notes	Security and Audit	Notes
Locations	Dates	Locations	Dates
Requests	Category	Requests	Category
Workflow	Record Class	Workflow	Record Class
Communications	Thesaurus Terms	Communications	Thesaurus Terms
Electronic	Relationships	Electronic	Relationships
Archiving	Other Record Fields	Archiving	Other Record Fields
Administrative Tools	Custom Properties	Administrative Tools	Custom Properties
Send To		Send To	

To edit **more than one folder**:

1. Tag all boxes you want to edit (manually click to the left of the box icon or use "tag" buttons on the Search tab)

2. Right click on any of the tagged boxes

3. From the menu, follow these instructions based on what you want to edit:

Title = Details -> Title (title options on previous page)

Notes = Details -> Notes

Category = Details -> Category

Cutoff Date = Details -> Custom Properties

Box Start Date = Details -> Custom Properties

Box End Date = Details -> Custom Properties

Agency Number = Details -> Custom Properties

4. Follow prompts. (Choose "All Tagged Rows" and "Yes to All" when prompted.)

