



Content Manager Guidance

Filing Records – Process Overview

Before filing electronic records to Content Manager, certain steps must be taken to make folders available for filing. This is an overview of the process and your available options for filing records.

Step 1. Determine which retention category your records belong in. Many county emails are General Office Communications, but most employees also have records that belong in more specific categories. For questions, ask your [Records Management Lead](#) or consult your [retention schedule](#).



Step 2. Decide if you need to create a new folder or if you can use an existing folder. Ask your [Records Management Lead](#) for best practice for your agency. Generally – if you are filing your own general communications or projects, you can create your own folder. But if you are filing records to a shared project or issue, you might use folders that someone else has created.



Step 3. If you need to create a folder, create it. (Refer to the [Create a Digital Folder](#)). If instead you need to use an existing folder, first find it in Content Manager and then add it to your Recent Containers. (Refer to **Search** job aids and the [Add/Remove a Folder To/From Dropzone](#) job aid).



Step 4. Determine which method you want to use to file

- A. Dropzone** (drag and drop) is better for **smaller** batches (less than 100 at a time)
- B. Direct Drag-and-Drop** is better for **larger** batches (more than 100 at a time), especially for emails and people who have **more than one computer monitor**
- C. Document Queues** are better for **larger** batches (more than 100 at a time)



(If you need to file emails, we recommend you make an [Outlook setting change](#). If you need to file from SharePoint or Teams, you will first need to [sync to OneDrive](#).)

Step 5. File! Links to job aids are below:

- A. [Dropzone](#)
- B. [Direct Drag-and-Drop](#)
- C. Document Queues – [Creating](#) and [Filing](#)

