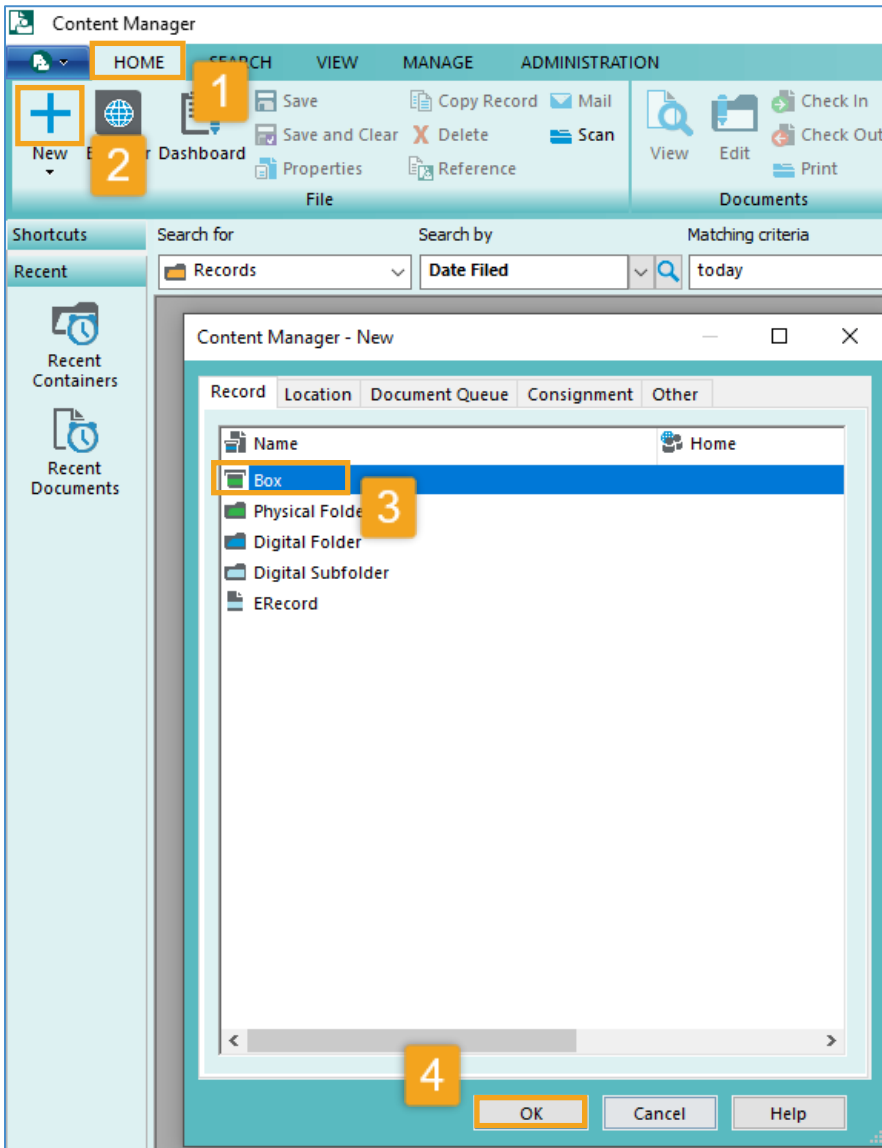




# Content Manager Guidance

## Create a Box

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



1. Click **HOME** tab

2. Click **Plus Sign (+)**

3. Select **Box**

4. Click **OK**

*[continued next page]*





# Content Manager Guidance

## Create a Box

**5** Box Title

**6** Box Notes

**7** Category

To select a category, either click the down arrow (recent categories) OR click the magnifying glass, then click the arrow to the left of your agency (all categories).

**8** Owner (Organization)

Owner should match the agency name listed above as part of the Category title.

**9** Box Start Date /dd/yyyy

**10** Box End Date /dd/yyyy

**11** Cutoff Date /dd/yyyy

The cutoff date is when the records become inactive and is when the retention period begins. It is required for Records Center storage.

**12** Agency Box Number

**13** OK Cancel Help

5. Enter the **Box Title**
  6. Enter the **Box Notes** (optional)
  7. Select a **Category** using the **magnifying glass lookup button** (Note: after any Category has been used, a down arrow will appear to select previously used Categories).
  8. Select an **Owner (Organization)** using the **magnifying glass lookup button** (Note: this defaults to the agency where the user works. Only change if needed).
  9. Enter the **Box Start Date**
  10. Enter the **Box End Date**
  11. Enter the **Cutoff Date** (previously Date Closed)\*
- \*Note: Cutoff Date is required for sending boxes for storage at the Records Center, but can be left blank if using to manage active records stored onsite.*
12. Enter the **Agency Box Number** (optional)
  13. Click **OK**

Refer to separate guidance documents for best practice and naming conventions for **Titles**, **Categories**, and **Cutoff Dates**.



RECORDS  
MANAGEMENT