# Content Manager Guidance
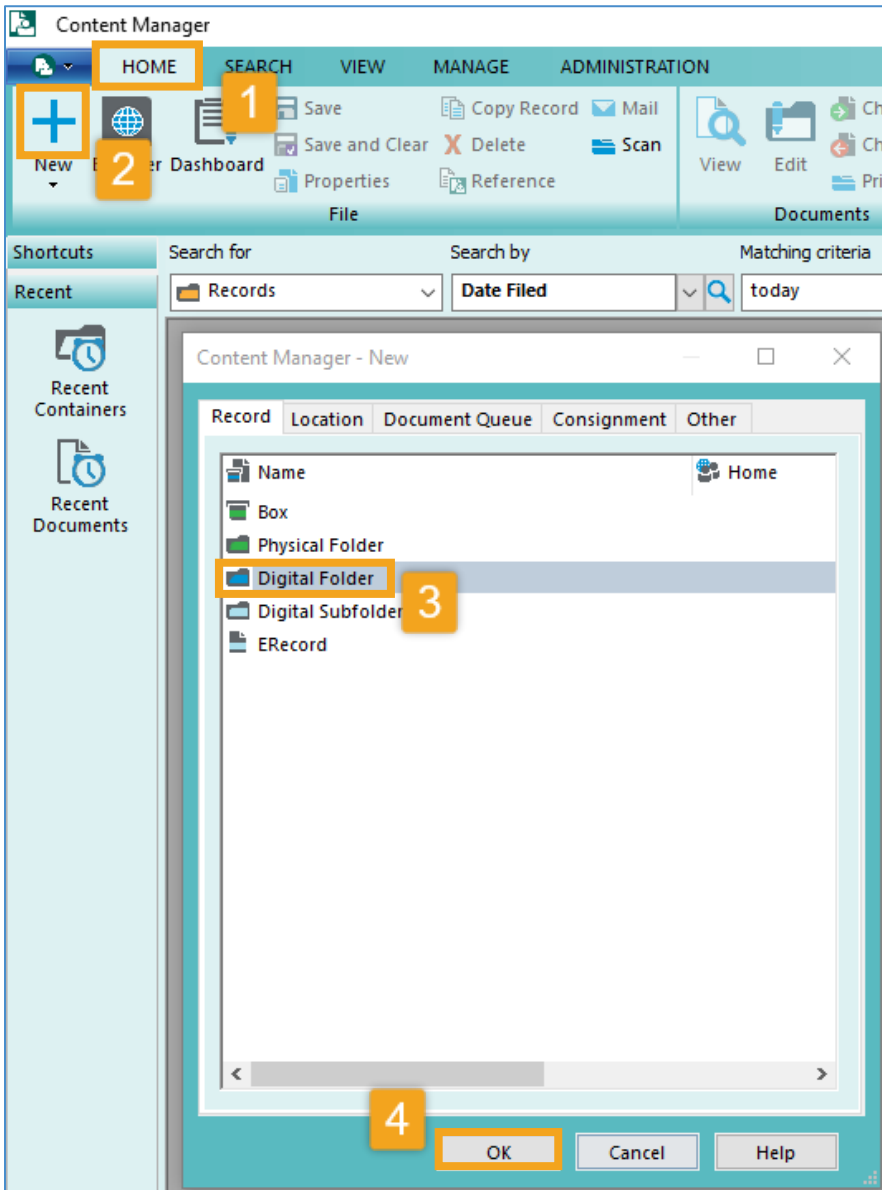## Create a Digital Folder

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



1. Click **HOME tab**

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

3. Select **Digital Folder**

4. Click **OK**

*[continued next page]*

King County Records Management Program
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1

New Digital Folder

Folder Title

**5**

Folder Notes

**6**

Category

**7**

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

Owner (Organization)

**8**

Owner must match the agency name listed above in the Category title.

Cutoff Date

**9** dd/yyyy

The cutoff date is when the records become inactive and is when the retention period begins.

**10** OK    Cancel    Help

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**5.** Enter the **Folder Title**

**6.** Enter the **Folder 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 **Cutoff Date** (previously Date Closed)

**10.** Click **OK**

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

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**RECORDS MANAGEMENT**

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2