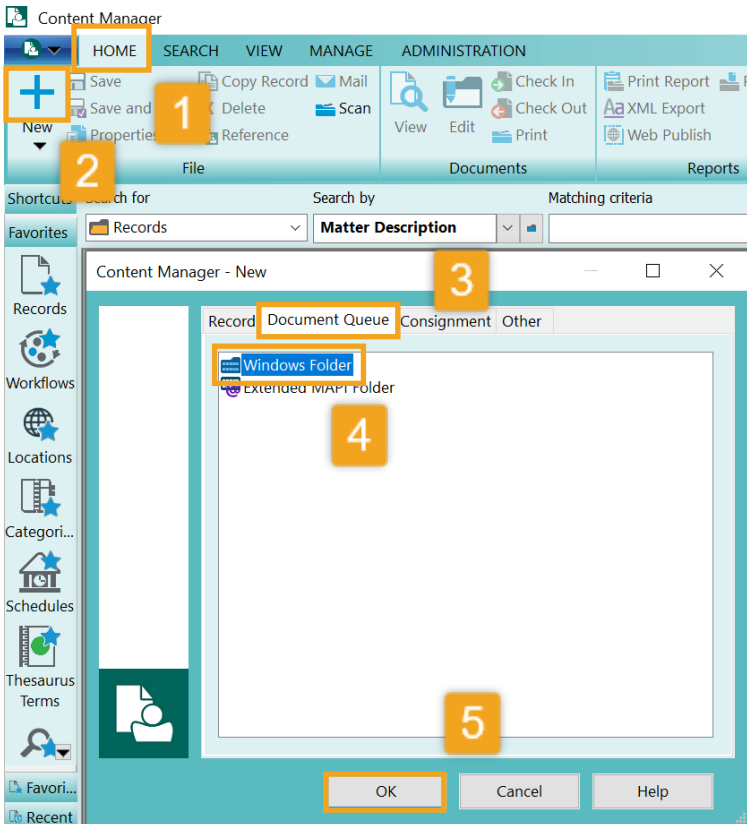


Content Manager Guidance

Document Queues - Creating

This is guidance for how to create Document Queues in Content Manager. Document Queues are an alternative to Dropzone for filing electronic records to Content Manager.



1. Click **HOME** tab
2. Click **Plus Sign (+)**
3. Click **Document Queue** tab
4. Select **Windows Folder**
5. Click **OK**

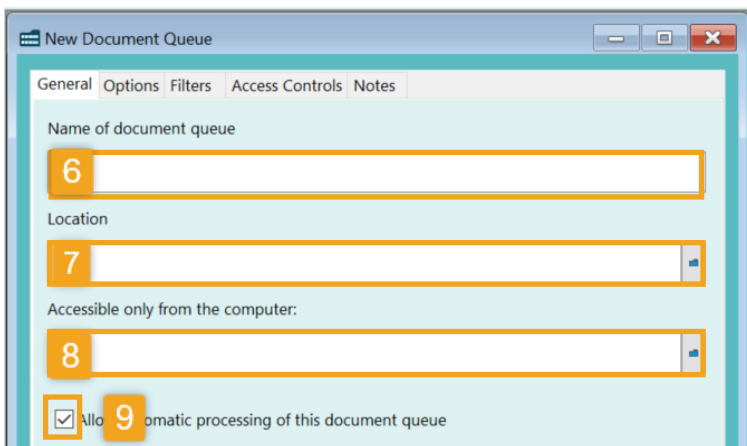
6. Enter the **Name of document queue** – name this whatever you want, but it should be descriptive about what it will be used for (e.g. “ABC Project”)

7. Enter the **Location** – this is the folder in your share drive or OneDrive where records will be filed *from*. Click the blue folder icon to locate and select the correct folder. You can either link to an existing folder that already has records in it, or create a new folder.

8. Under **Accessible only from the computer** – this defaults to the computer of the user logged in. If you are the only person that will ever use this, then leave the computer name there. If you want this to be used by multiple people, **erase** the computer name and leave it blank

9. Put a **check mark** next to **Allow automatic processing...**

[continue to next page]





Content Manager Guidance

Document Queues - Creating

The screenshot shows the 'New Document Queue' dialog box with the following elements highlighted by numbered callouts:

- 10:** The 'Options' tab is selected.
- 11:** The 'Default record type' dropdown menu.
- 12:** The 'Default container' dropdown menu.
- 13:** The 'When document is being processed:' section, which includes several checkboxes.
- 14:** The 'After processing each document:' dropdown menu, currently set to 'Delete the document'.
- 15:** The 'OK' button at the bottom of the dialog.

10. Click the **Options** tab

11. Under **default record type** select **ERecord**

12. Under **Default container** enter the **record number** for the folder in Content Manager where the records will be filed to (i.e. DF640177). If the record number is not known, click the blue folder button to search for and locate correct folder.

Note that the folder in Content Manager must already exist. If it does not, refer to job aid for How to Create a Digital Folder. Please note that in order to use the folder, the "Date Closed" (i.e. Cutoff Date) must be blank. You can edit the folder details to remove that date and add it back in after the document queue is created.

13. Change check marks to match what is at left. The **only** option that should be checked is **If possible, suppress entry form when creating new records**.

14. Under **After processing each document** click the down arrow to select **Delete Each Document**

15. Click **OK**

The Document Queue is now ready to use. Refer to separate job aid for how to file to Document Queues.



**RECORDS
MANAGEMENT**

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