



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.

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 will probably 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](#) job aid).



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 if you are going to use [Dropzone or Document Queues](#)

Dropzone (drag and drop) is better for **smaller** batches (less than 100 at a time)
Document Queue is better for **larger** batches (more than 100 at a time)



Step 5. File!

Dropzone – from [Outlook](#), [OneDrive](#) or [SharePoint/Teams](#)
Document Queues – [Creating](#) and [Filing](#) (from all locations)

