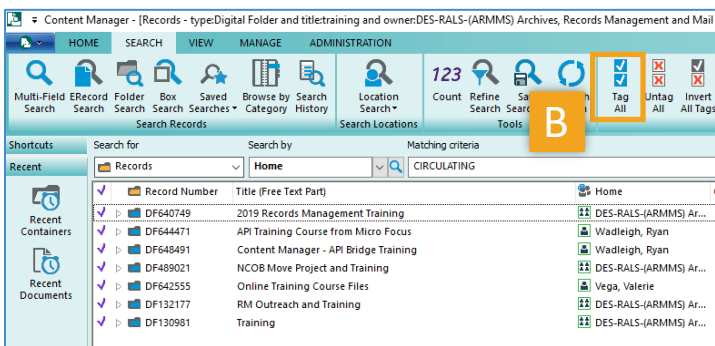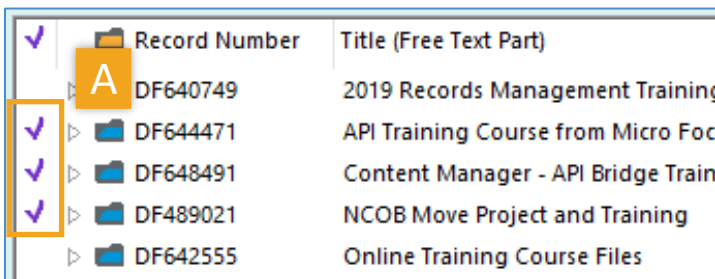# Content Manager Guidance

Perform actions on multiple records

This is guidance for how to **perform actions on multiple records** at the same time in **Content Manager**.

You can perform the following functions on more than one record at a time:
- <u>edit</u> digital folders, subfolders and boxes
- <u>move</u> electronic records to different folders
- <u>send boxes</u> to the Records Center
- <u>request boxes</u> from the Recods Center

> Before performing an action on multiple records, you must **tag all records** that you need to edit, request or send.
>
> When records are tagged, they will have a purple check mark in the far-left column.
>
> To tag records you have two options:
>
> **A. manually tag** individual records by clicking in the white space to the left of each record
>
> OR
>
> **B**. Click the **SEARCH** tab and the **Tag All** button to tag all records visible in the view pane.
>
> Now that multiple records are tagged, you can perform the desired function.
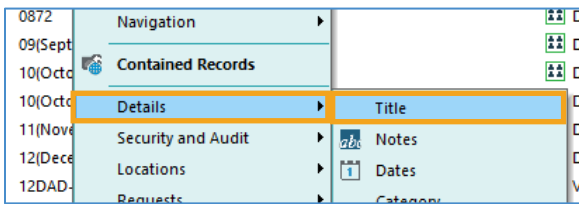>
> *[continued on next page]*

King County Records Management Program
206-477-6889 - records.management@kingcounty.gov
www.kingcounty.gov/recordsmanagement

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Content Manager Guidance

Perform actions on multiple records

Change Title:

Change Notes:

Change Category:

Move to different Folder or Box:

Send a Box:
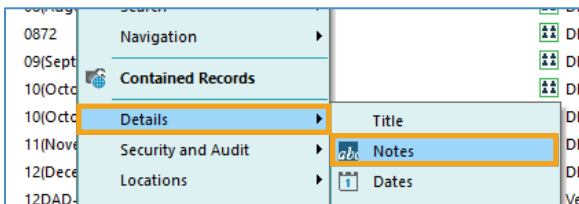

To change a Title
1. **Right click** on one of the tagged records
2. Select **Details** and then **Title**
3. Follow prompts
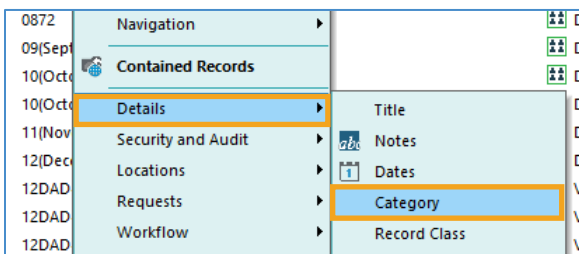4. Click OK to apply to **All Tagged Rows**

To change Notes
1. **Right click** on one of the tagged records
2. Select **Details** and then **Notes**
3. Follow prompts
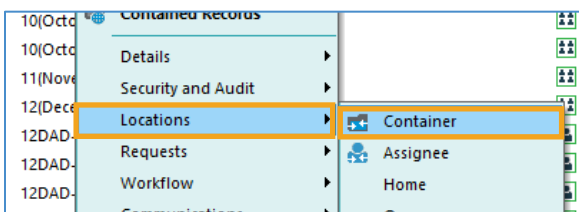4. Click OK to apply to **All Tagged Rows**

To change a Category
1. **Right click** on one of the tagged records
2. Select **Details** and then **Category**
3. Follow prompts
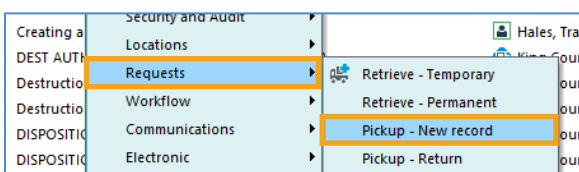4. Click OK to apply to **All Tagged Rows**

To move to a different Folder or Box
1. **Right click** on one of the tagged records
2. Select **Locations** and then **Container**
3. Follow prompts
4. Click OK to apply to **All Tagged Rows**

To submit a box pickup request
1. **Right click** on one of the tagged records
2. Select **Requests** and then **Pickup – New record**
3. Follow prompts
4. Click OK to apply to **All Tagged Rows**

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