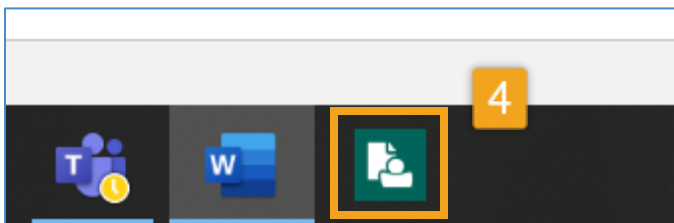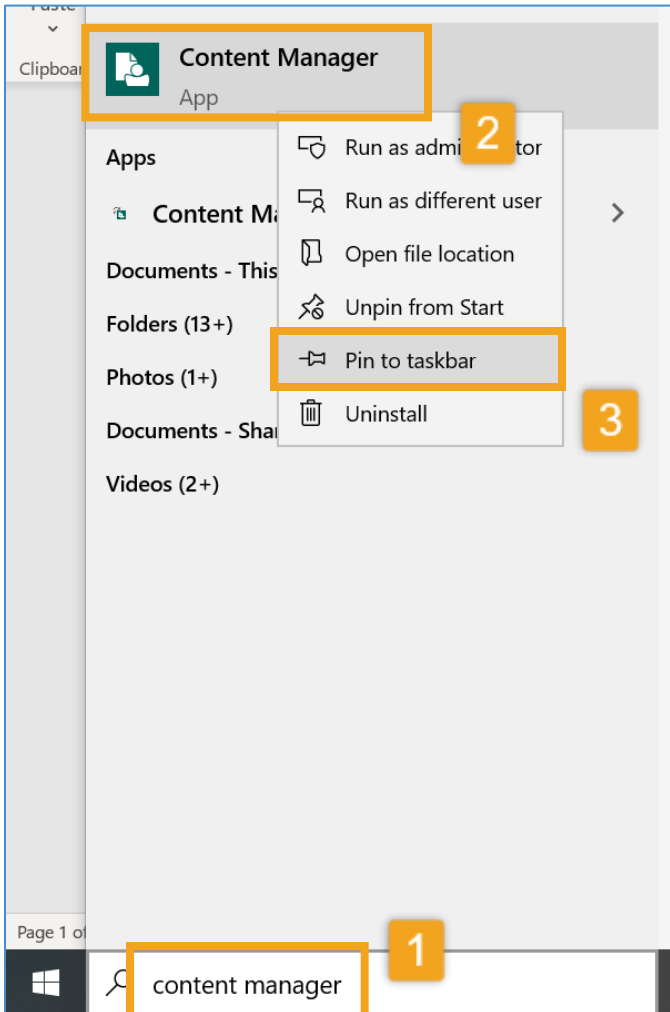# Content Manager (CM) Guide
How to Open

This is general guidance for navigating in Content Manager, including how to open Content Manager.

Opening Content Manager

1. Type **content manager** in the computer taskbar search

2. Right click on **Content Manager**

Note: do **not** choose other applications that have other words in their title, such as DataPort, Desktop, or Queue Processor. Only use the app with the exact title "Content Manager" as shown in this screenshot.

3. Select **Pin to taskbar**

4. Open Content Manager by **clicking the icon on the taskbar**

Important! Connection to the county's network through **VPN is required** before accessing Content Manager.

[continued next page]

Content Manager (CM) Guide
How to Open

Open Multiple Instances of Content Manager

If you need to perform multiple functions in Content Manager at one time (such as filing big batches of records or performing complex searches) you can open multiple instances of Content Manager and do something different in each one. **Right click** on the Content Manager **icon on the taskbar** and select **Content Manager** to open a new instance.
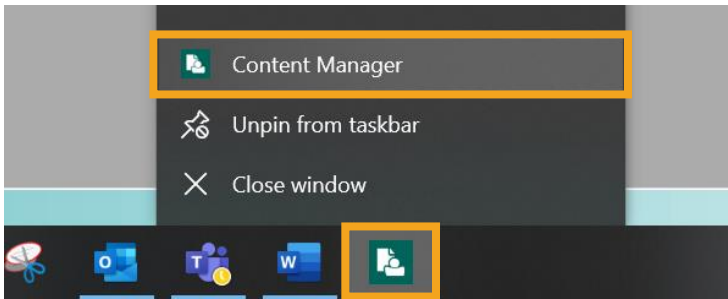
Use Keyboard Shortcuts

Content Manager has certain keyboard shortcuts that can be used to help with certain functions, especially searching

Ctrl + N – create a new box or folder

F7 – refine a search

F6 – count search results

F9 – close all windows

General Concepts

- Choosing a Category associates a record with a state-approved records retention schedule
- Access to all records is controlled by membership in an Organization
- All records in Content Manager are 100% searchable, including their content and their metadata

Filing

- File to Content Manager by dragging records to Dropzone
- Activate Dropzone by clicking the **minimize button** of Content Manager
- Folders that *you* create are automatically added to Dropzone
- Add other folders by **right clicking** on them and select **Send To** and **Add to Recent Containers**