Content Manager (CM) Guide
Boxes – Search Parameters and Field Crosswalk

This document identifies search parameters for **Boxes** in Content Manager (CM). Review the *"Search Manual"* and other job aids for detailed guidance on how to perform searches using the below search parameters.

How to search for Boxes:
Use the **Box Search** form on the **Search tab**. For search parameters not listed on that form, use the Multi-Field search.

To Search Across Multiple Fields:

"Search By" Parameter	Which fields does it search?	Instructions
Keyword Search	- Title - Notes - Record Number - Owner (i.e. agency/office name) - Category - Agency Number - RC Accession Number - Matter Description (Pre-2019 Boxes only) - Box Description (Pre-2019 Boxes only) - RC Legacy Org Code (Pre-2010 Boxes only) - RC Legacy Location Number (Pre-2010 Boxes only)	Enter your search term. Use quotes for phrases (e.g. "project report" or "95-976") and use asterisks/wildcards for partial words (e.g. duwam*). For multiple keywords, use BOOLEAN operators (i.e. Duwamish AND 978578).
Any Word	-Title -Notes	Same as above.

To Search in Specific Fields:

"Search By" Parameter	What does this search?	Instructions
Keywords from the **Title** or **Notes** of the box.		
Title Word	Box **Title** as entered by the user	Enter a word. For phrases use quotation marks (i.e. "project files").
Notes Word	Box **Notes** as entered by the user. (Notes also include legacy "Matter" and "Description" fields).	Enter a word. For phrases use quotation marks (i.e. "project files").
Names of **People** associated with the box.		
Creator	The name of the user that **created/entered** the box.	Enter a name (or partial name) in the field and then click the blue folder button. Must enter last name first.
Dates associated with the box.		
Box Start Date	**Beginning date** for the box contents, as entered by the user.	Enter a date or a date range or choose other date options.
Box End Date	**End date** for the box contents, as entered by the user	Enter a date or a date range or choose other date options.
Cutoff Date	Box **cutoff date** (i.e. date the records became **inactive**) as entered by the user.	Enter a date or a date range or choose other date options.
Date Created	The date the box was **created / entered** into Content Manager (or KC ERMS).	Enter a date or a date range or choose other date options. *Note: Date Filed also has this same data, but is only accurate for boxes created in Content Manager (Oct. 2019 to present).*

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Date To destroy OR **Date To archive (transfer custody)**	**Date** the box is **eligible for disposition** by destruction (non-archival) or transfer (potentially archival or archival). This data appears in the "Scheduled Disposal Method" field.	Enter a date or a date range or choose other date options. Note: Use "Date to destroy" vs. "Date to archive" depending on the archival status of the category.
**Other Metadata** (information/details) about the box.	
Record Number	Content Manager's **auto-generated number** that goes on the label.	The numbers always have a "B" in front of them (i.e. B4995 is Box #4995).
Box Description [Legacy data, pre 5/11/2019 only]	Box **description** as entered by the user.	Use asterisks (*) before and after search terms (i.e. *report*). (Legacy field, not used anymore. All box descriptions have been migrated to the Box Notes field, but can still separately be searched here.)
Agency Number	An **optional box number** entered by end users, their own number that is different from the KC ERMS/CM generated number.	Enter a number. Use wildcards (* or ?) for partial numbers.
Is in one or more holds	Whether a record is **on a legal hold** and cannot be dispositioned. (yes/no field)	Add this parameter to find records on hold. Select NOT at the bottom to find records not on hold.
Consignment Number	The **disposition number** for the box which indicates that it is on a consignment and in the approval process prior to disposition.	Disposition number generated from CM. Successor to the Session Details field.

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"Search By" Parameter	What does this search?	Instructions
File Plan Details (Content Manager / Records Center storage information)		
In space	**Physical location** of the box within the **Records Center**. This displays data in the "Home" field.	To search for a **specific Records Center location**, Enter the 16-digit space number that corresponds with the displayed location. For example "Records Center, Row 340, Shelf 17, Slot 1" is entered as "0005-0340-0017-0001". Use wildcards (*) or (?) for portions of the space that is unknown. For example searching *0340* would show all spaces in Row 340. To search for a box that is **NOT at the Records Center**, change the "Select search style for Space" option to "Where home space is not specified". To a search for a box that is **anywhere in the Records Center**, choose the above "Where home space is not specified" setting and click the NOT button.
Category	The name/title of the retention **category** associated with the box.	Instead of searching, you will probably click the blue folder icon and scroll through available categories, which are in alphabetical order.
Owner	The **organization/agency** that owns the records.	Instead of searching, you will probably click the blue folder icon and scroll through available owners, which are in alphabetical order.
Matter Description (legacy data)	The title of the **matter** associated with the box.	Enter a word. For phrases use quotation marks (i.e. "project files") (Legacy data, boxes created before 5/11/2019 only. The data is also in the Box Notes, but is also searchable here.)

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RC Accession Number	The **numerical accession number** (i.e. (19-347) manually given to boxes when they are accessioned into storage.	Use asterisks (*) before and after search term(s)
RC Legacy Location Number (legacy data)	**Old Records Center Location** Number from a pre-2010 transmittal	Use asterisks (*) before and after search term(s)
RC Legacy Org Code (legacy data)	Old 4-digit org code from a pre-2010 transmittal.	Use asterisks (*) before and after search term(s)
RC Legacy DAN (legacy data)	Old DAN entered/sent from a pre-2010 transmittal.	Use asterisks (*) before and after search term(s)
RC Legacy Disposition Number (legacy data)	Old Disposition number (e.g. TR-93-017)	Use asterisks (*) before and after search term(s)

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