



Content Manager Guidance

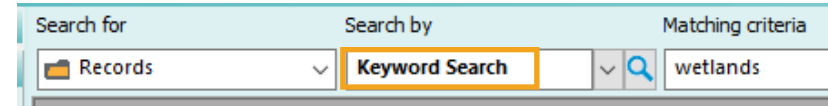
Digital Folders – Search Parameters and Field Crosswalk

This document identifies search parameters for **Digital Folders** 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.

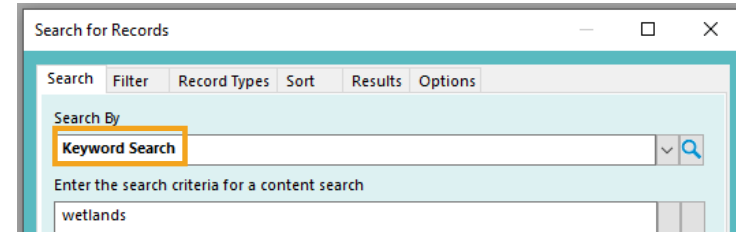
How to search for Digital Folders:

In the “Search by” field enter any of the parameters from the green column below. (You can also enter the search parameter **Record Type = Digital Folder** to ensure that you are not searching for other record types.)

Basic Search (single parameter):



Advanced Search (multiple parameters):



To Search Across Multiple Fields:

“Search By” Parameter in Content Manager	Which fields does it search?	Instructions
Keyword Search	<ul style="list-style-type: none"> - Title - Notes - Record Number - Owner (i.e. agency/office name) - Category - Matter Description (Pre-2019 folders only) 	<p>Enter your search term.</p> <p>Use quotes for phrases (e.g. “project report” or “95-976”) and use asterisks/wildcards for partial words (e.g. duwam*).</p> <p>For multiple keywords, use BOOLEAN operators (i.e. Duwamish AND 978578).</p>
Any Word	<ul style="list-style-type: none"> - Title - Notes 	Same as above.





To Search in Specific Fields:

“Search By” Parameter in Content Manager	What is this field?	KC ERMS Field Name (legacy system)	Content Manager Field Name (current data)	Notes/Instructions when using this parameter
Keywords from the Title or Notes of the folder.				
Title Word	Folder title as entered by the user	Folder Name	Folder Title	Enter a word. For phrases use quotation marks (i.e. “project files”).
Notes Word	Folder notes as entered by the user.	Folder Notes	Folder Notes	Enter a word. For phrases use quotation marks (i.e. “project files”).
Names of People associated with the folder.				
Creator	The name of the user that created/entered the folder.	Folder Created By	Creator	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 folder.				
Cutoff Date	Folder cutoff date (i.e. date the records became inactive) as entered by the user.	Folder Cutoff Date	Cutoff Date	Enter a date or a date range, or choose other date options.





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"Search By" Parameter in Content Manager	What is this field?	KC ERMS Field Name (legacy system)	Content Manager Field Name (current data)	Notes/Instructions when using this parameter
<p>Date Filed</p> <p>(after 10/6/2019 only)</p>	<p>The date the folder was created / entered into the current system, Content Manager (CM), from 2019 to present.</p>	<p>Date Folder Created</p>	<p>Date Filed (after 10/7/2019)</p>	<p>Enter a date or a date range, or choose other date options. (use this parameter for folders created in Content Manager [on or after 10/7/2019])</p> <p>Note: all folders created before 10/6/2019, will have the Date Filed of 5/24/2019, which is the date they were migrated into Content Manager from KC ERMS. For the date they were entered into KC ERMS, use Date Created (below).</p>
<p>Date Created</p> <p>(before 5/11/2019 only)</p>	<p>The date the folder was created / entered into the predecessor system, KC ERMS, from 2008 to 2019.</p>		<p>Date Created (before 5/10/2019)</p>	<p>Enter a date or a date range, or choose other date options. (use this parameter for folders created in KC ERMS before May 11, 2019) [LEGACY FIELD]</p> <p>Note: this field is only reliable for folders created in KC ERMS (before 5/11/2019). For folders created after that date, it is</p>





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"Search By" Parameter in Content Manager	What is this field?	KC ERMS Field Name (legacy system)	Content Manager Field Name (current data)	Notes/Instructions when using this parameter
				usually the same as the Cutoff Date/Date Closed, because the system does not allow a Date Created to be later than the Date Closed.
Date To destroy OR Date To archive (keep forever)	Date the folder is eligible for destruction or archival transfer .	Disposition Eligible Date	Scheduled Disposal Method	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/record series.
Folder Start Date (folders created before 5/11/2019 only)	Beginning date for the folder contents, as entered by the user (KC ERMS records only, pre 5/10/2019.)	Folder Begin Date	Folder Start Date	Enter a date or a date range, or choose other date options.
Folder End Date (folders created before 5/11/2019 only)	End date for the folder contents, as entered by the user. (KC ERMS records only, created before 5/10/2019.)	Folder End Date	Folder End Date	Enter a date or a date range, or choose other date options.





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“Search By” Parameter in Content Manager	What is this field?	KC ERMS Field Name (legacy system)	Content Manager Field Name (current data)	Notes/Instructions when using this parameter
Other Metadata (information/details) associated with the folder.				
Record Number	Content Manager’s unique auto-generated number .	Folder ID Number	Record Number	The numbers from KC ERMS are the same, but boxes now have a "DF" in front of them (i.e. 4995 is now DF4995).
Is in one or more holds	Whether a folder is on a legal hold and cannot be dispositioned.	Hold	Is in one or more holds	No searching needed. 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 folder.	n/a - new field	Consignment Number	Disposition number generated from CM. Successor to the Session Details field.
File Plan Details (Content Manager storage information)				
Category	The name/title of the retention category associated with the folder.	Category Name	Category	Instead of searching, you will probably click the lookup button, then expand the agency name and scroll through available categories, which are in alphabetical order.





“Search By” Parameter in Content Manager	What is this field?	KC ERMS Field Name (legacy system)	Content Manager Field Name (current data)	Notes/Instructions when using this parameter
Owner	The organization/agency that owns the records in the folder.	Department, Division, Section/ID	Owner (Organization)	Instead of searching, you will probably click the lookup button and scroll through available owners, which are in alphabetical order.
Matter Description	The title of the matter associated with the folder.	Matter	Matter Description	Enter a word. For phrases use quotation marks (i.e. “project files”). (Folders created before 5/11/2019 only. Matter descriptions have been migrated into Folder Notes but are also searchable here.

