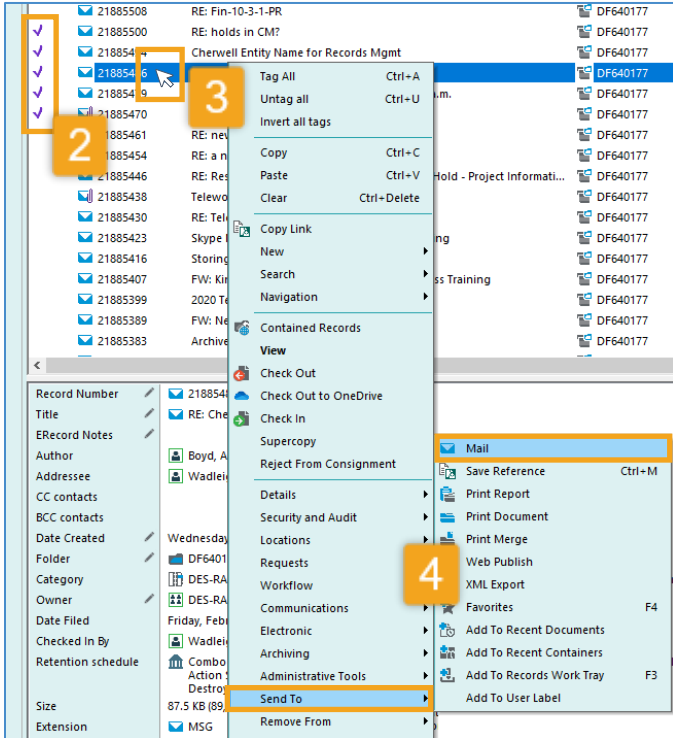




Content Manager Guidance

Share Records with Others

This is guidance for how to share a record (or group of records) with other people.



1. Open Content Manager (CM) and locate the records you want to share

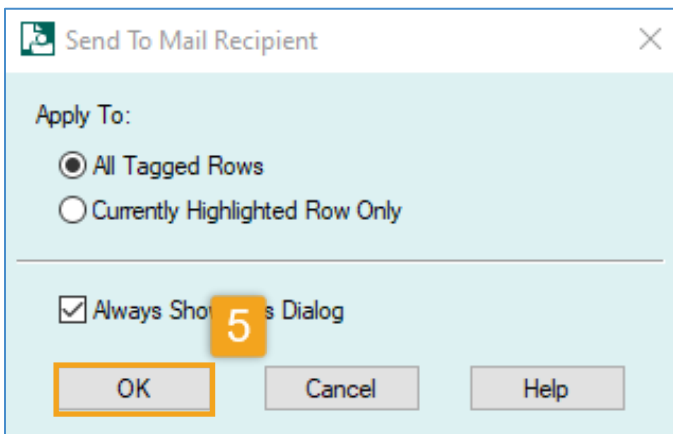
2. **Tag** all the records you want to share

3. **Right click** on any of the tagged records

4. Select **Send To** and **Mail**

5. Click **OK**

[continue to next page]





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6. From there, you have different options depending on whether the recipient is a Content Manager user or not (including external parties).

If they are **not** a Content Manager user, select **Electronic document** and click OK.

Then an email message opens with a copy of the record(s) as an attachment to send via Outlook.

Alternately: you can select **Supercopy** from the right-click menu to save a *copy* of the document to your OneDrive and then share with others from OneDrive.

If they are a **Content Manager user**, select **Content Manager record reference** and click OK

Then an email message opens with a *reference* to the record(s) in Content Manager, as an email attachment. After sending, the recipient can double click on the attachment to open it directly in Content Manager.

