



# Content Manager Guidance

## User Access Rights

This document explains what different users in Content Manager can do in the system. All end users are either **General Users** or **Records Management Leads**. Functions not available to either type of user are performed by Records Management.

### DIGITAL RECORDS

Task	General User	Records Management Lead
Create a digital folder	✓	✓
Create a subfolder	✓	✓
Edit folder title	✓	✓
Change folder category	✓	✓
Change folder owner	✗	✗
Edit date closed	✗	✓
Add folders to Dropzone	✓	✓
Remove folders from Dropzone	✓	✓
File electronic records using Dropzone	✓	✓
Move electronic records to different folders	✓	✓
Delete folders or electronic records	✗	✗
Access/open electronic records	✓	✓
Export digital records (Supercopy)	✓	✓
Email copies of electronic records from CM	✓	✓
Edit notes for folders and records	✓	✓

### PHYSICAL RECORDS

Task	General User	Records Management Lead
Create a box	✗	✓
Create a physical folder	✗	✓
Edit box or folder title	✓	✓
Edit box or folder notes	✓	✓
Change box category	✓	✓
Change box owner	✗	✗
Edit start and end dates	✓	✓
Edit date closed	✗	✓
Edit box or folder agency numbers	✓	✓
Request box pickup	✗	✓
Request box or folder retrieval	✗	✓
Request box or folder return	✗	✓
Delete boxes or folders	✗	✗
View requests	✗	✓



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 206-477-6889 - [records.management@kingcounty.gov](mailto:records.management@kingcounty.gov)  
[www.kingcounty.gov/recordsmanagement](http://www.kingcounty.gov/recordsmanagement)

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### SEARCHING

Task	General User	Records Management Lead
Simple search	✓	✓
Advanced search	✓	✓
Public Records search / IDOL searching	✓	✓
Search for electronic records	✓	✓
Search for folders	✓	✓
Search for boxes	✓	✓
Search agency section roles	✓	✓
Save searches for yourself	✓	✓
Save searches for others	✗	✗
Use saved searches	✓	✓
Search for categories	✓	✓
Search for locations	✓	✓

### MANAGING CM

Task	General User	Records Management Lead
Install Content Manager*	✓	✓
Add new users	✗	✗
Edit users	✗	✗
Add categories	✗	✗
Change retention schedules	✗	✗
Create or assign holds	✗	✗
View audit trails	✗	✓
Approve disposition (consignments)	✗	✓
Create and share user labels	✓	✓

✓ YES

✗ NO

\*Employees outside the Executive branch need to install Content Manager through their IT department.

