

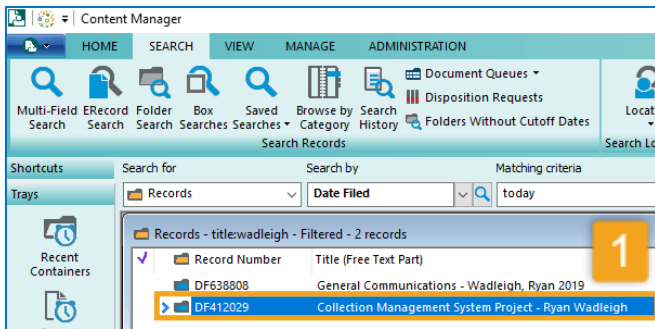


Content Manager Guidance

File Electronic Records with Direct Drag-and-Drop

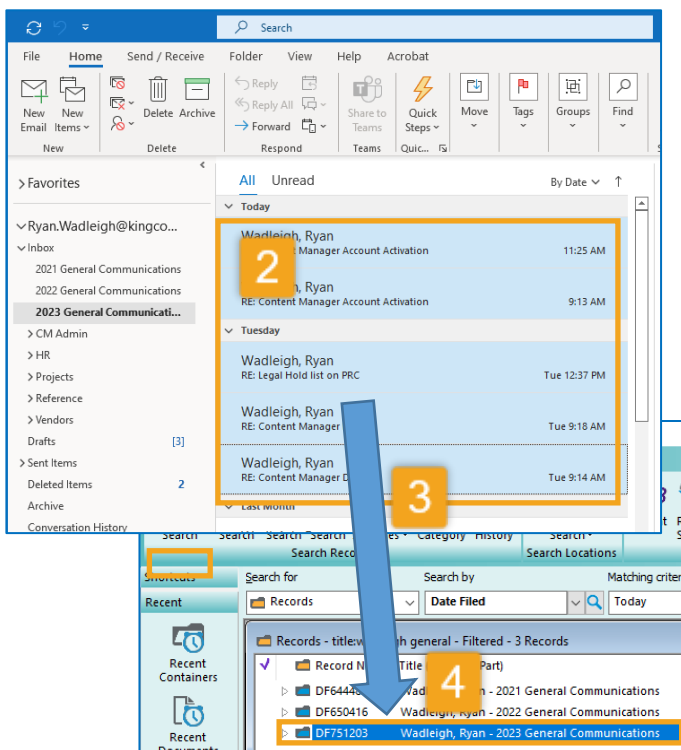
This is guidance for how to **file electronic records** to Content Manager using the **Direct Drag-and-Drop** method; either from **Outlook** (emails) or **File Explorer** (all other document types).

To file emails, we recommend that you [update your Outlook settings](#) to optimize filing. It is only possible to file emails from the installed version of Outlook on your computer; do not attempt to file from Outlook in a web browser. To file electronic documents that are stored in SharePoint or Teams, you first need to [sync the files to OneDrive](#), then proceed to the below steps.



1. Locate the Digital Folder in Content Manager where you want to file the records. (*Hint: locate folders you already file to by selecting “Recent Containers” in the vertical left-hand Trays column. Or, locate other folders using “Folder Search” on the Search tab.*)

Leave Content Manager open and do **NOT** minimize it. This process is easiest when you are using **multiple monitors**. Leave **Content Manager open on one monitor** and move to step 2 on the other monitor.



2. Identify and select records to file. (*The screenshot shows records in Outlook, but you can also file records from File Explorer. To select multiple records, use Ctrl + A to select everything in a folder, or Ctrl + mouse click to select specific records.*)

3. Drag the records

4. Drop the records onto the folder in Content Manager identified in step 1.

(While this is in process, you will see a “Please Wait” window.)

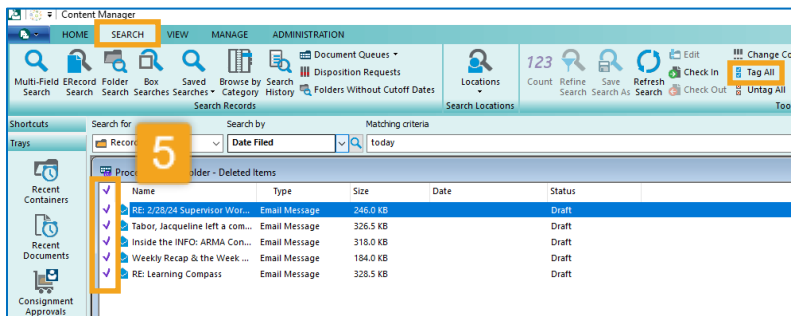
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5. In the Process Email (or Documents) in folder window, either select one of the records and type **Ctrl + A or select **Tag All** on the **Search** tab.**

6. Right click on any of the tagged records and select **Check In or select **Check In** on the **Search** tab.**

(While this is in process you will see a "Please Wait" window.)

That's it! When the process is finished, the "Process ... in folder" window in Content Manager will be empty and can be closed. Repeat as needed.

If filing emails, the emails will be removed from Outlook (and copies will be in Deleted Items). If filing other electronic records, those documents will also be removed from their folder location.

Note that if you only drag one record at a time, it bypasses steps 5 and 6 above. If you drop 2 or more records at a time, steps 5 and 6 are required.

