



Content Manager Guidance

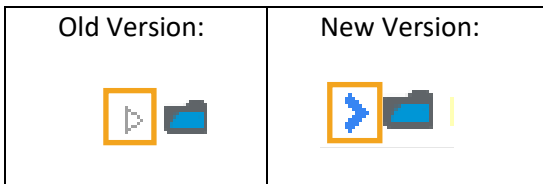
Summary of Changes – Upgrade March 2024

Content Manager was upgraded on March 26, 2024. The system was upgraded from version 10.0 to version 23.4 (which reflects a new numbering scheme from the vendor). The new version provides many improvements, but overall has the **same look-and-feel** and user experience. **All existing processes are the same**, although there are some minor interface changes and other improvements.

This document describes the **New Features, System Improvements/Enhancements, and Interface Changes.**

General Interface Changes

The “**expand**” button is now a **blue arrow** instead of a **white triangle/caret**.



The **Browse by Category** function now **displays automatically** each time you open Content Manager.

The **Browse by Category** function now displays a **true hierarchy of records** (i.e. parent-child relationship). As opposed to the previous version when records were displayed in a flat structure, and thus sometimes appeared to be duplicated.

The “**Home**” **tab** has been redesigned to focus on the features that county employees use. New options include:

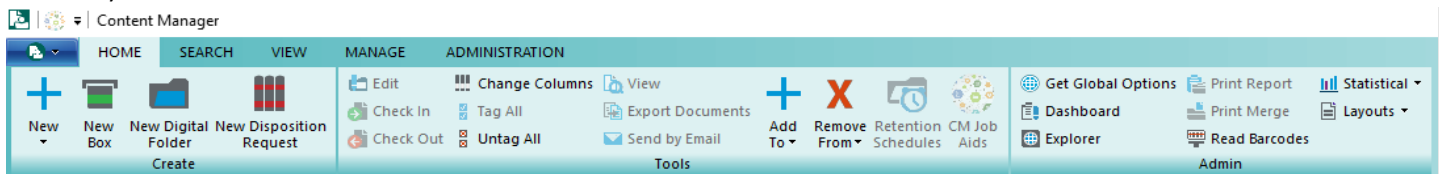
New Box – shortcut to create a new box

New Digital Folder – shortcut to create a new digital folder

New Disposition Request – shortcut to create a new disposition request

Retention Schedules – link to retention schedules on RM website (only works when you have records displayed in CM)

CM Job Aids – link to CM Job Aids page on RM website (only works when you have records displayed in CM)



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The “**Search**” tab has been modified to add additional features.

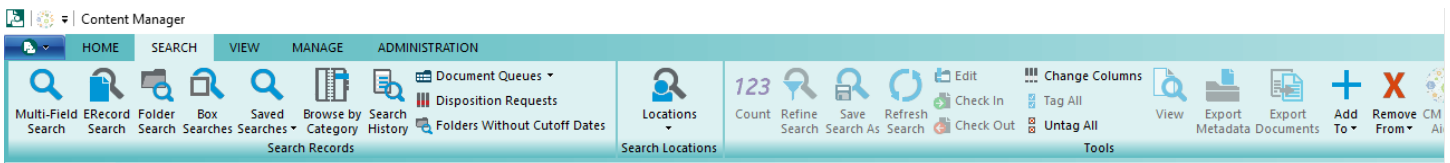
New options include:

Document Queues – displays all Document Queues that already exist

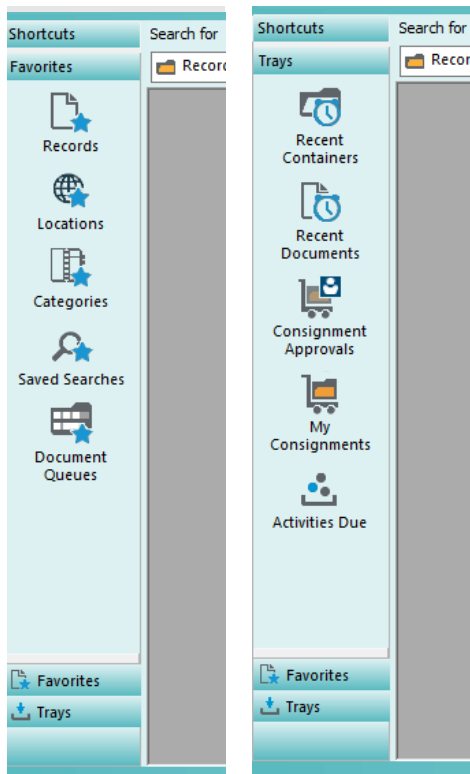
Disposition Requests – displays all Disposition Request Forms that have previously been submitted

Folders Without Cutoff Dates – displays all folders without cutoff dates (cleanup opportunities)

CM Job Aids – link to CM Job Aids page on RM website (only works when you have records displayed in CM)



The **vertical left-hand “Shortcuts” bar** of Content Manager has been redesigned and we have removed options that county employees do not use. Below are the new options for “Favorites” and “Trays”.





Editing Records

Editing the title of an existing record now requires **one less click** (the “Change free text” box is already checked).

Editing the **Cutoff Date** for **multiple records at the same time** is now accomplished through a different right click menu option (**Right click** and then **Properties Editor**).

Filing Records

In addition to existing methods of filing to Content Manager (Dropzone and Document Queue) there is a third option: **Direct Drag-and-Drop**. This new method is generally **faster and more efficient for larger batches** (more than 100 at a time) of electronic records, **especially emails**. However, the direct drag-and-drop method works best for staff with more than one computer monitor.

When creating a **Document Queue** to file records, the required settings are now separated into **different tabs**; but they are the options are the same.

Consignments / Dispositions

When Disposition Authorities review records up for disposition on a consignment, they **can now view child records directly from the consignment approval section** (no separate workaround is required, like in previous version).

When Disposition Authorities review records up for disposition on a consignment, they **can now reject individual records (if relevant) and approve the rest** (as opposed to previous version which only allowed you to reject all or approve all).

Other

When you **email a record from Content Manager** (Right click, Send To, and Mail), the record is now embedded within the email rather than attachment to it.

