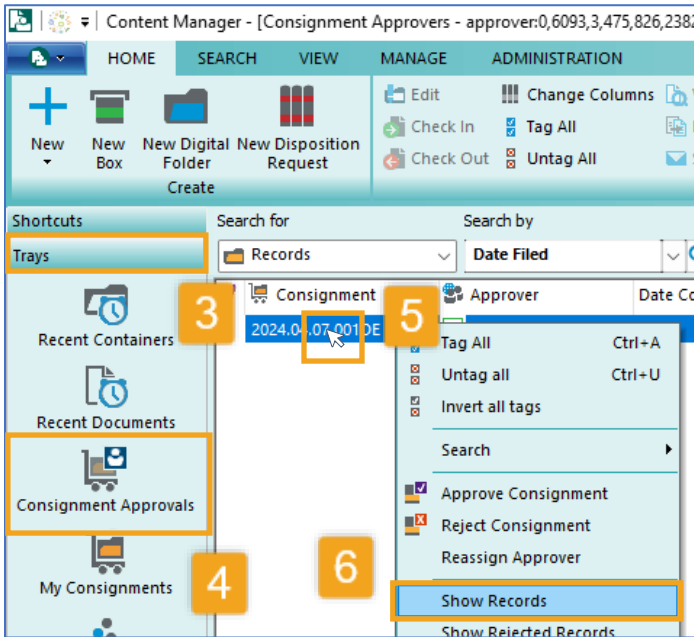




Content Manager (CM) Guide

Review Records for Disposition on a Consignment

This is guidance for how to review records eligible for disposition (on a consignment) in Content Manager.



1. Receive an email from the Records Center or Records Management letting you know that you have a Consignment to review. *Note that you might have multiple consignments to review and act on.*

2. Open Content Manager

3. Select Trays in the far-left column

4. Select Consignment Approvals

5. Locate the consignment number from your email message and **right click** on it

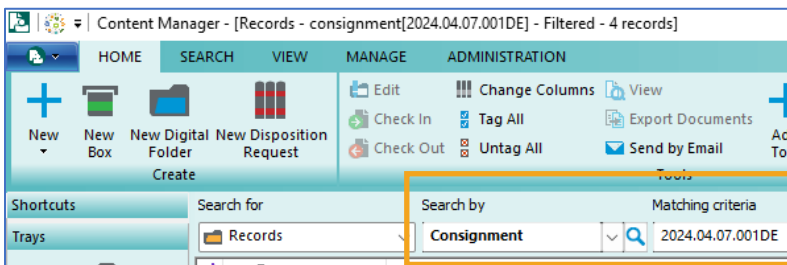
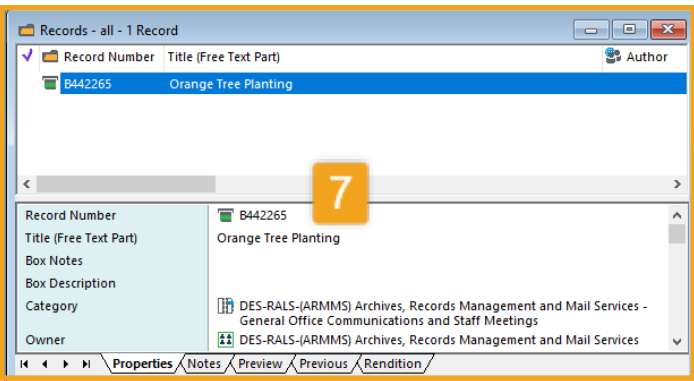
6. Select Show Records (if you need to review them before taking action)

7. Review the Records. A new window will open which will display all eligible records for review. All information and metadata about the records is listed in that window.



If you need other coworkers to review the records before taking action, the simplest method is to direct others in your agency to use the **single-parameter search**. Under **Search by**, they can change to **“Consignment”** and under **Matching criteria**, they can enter the **consignment number** from the email in step 1 (see screenshot at left).

[continued next page]



King County Records Management Program
206-477-6889 – records.management@kingcounty.gov
www.kingcounty.gov/recordsmanagement



Content Manager (CM) Guide

Review Records for Disposition on a Consignment

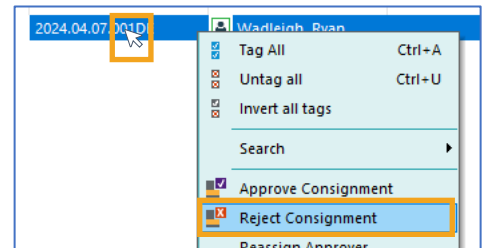
8. The records on the consignment will be scheduled for disposition 45 days after the date you received the email notice described in step 1.

If you do **not** need to halt disposition of those records during the 45-day period, **no action is required.**

If, however, you **do** need to halt disposition of records before the end of the 45-day period, there are **several options (see A, B, C, or D below):**

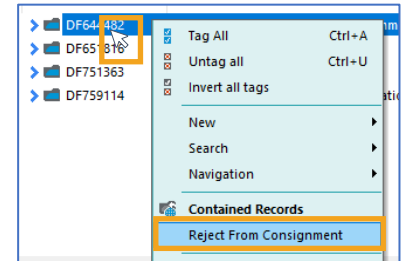
A. Reject ALL records:

- go back to the **Consignment Approvals** (step 4)
- **right click** on the consignment
- select **Reject Consignment**
- add a **reason** for rejecting all records and select **OK**



B. Reject SOME records:

- go back to the list of records on the consignment (step 6)
- right click on a record and select **Reject from Consignment**
- add a **reason** for rejecting the selected record and select **OK**



C. Add records to a HOLD:

Follow the process to [Add Records to a Legal Hold](#) within Content Manager.

Afterwards, any record on a hold will no longer be eligible for disposition, even if it is already on a consignment.

D. Change the category or cutoff date for a record:

Records are calculated for disposition based on their 1) category and 2) cutoff date. If any of that information is incorrect, it could affect disposition eligibility. **All users can change categories or cutoff dates at any point until the record is dispositioned.** If a record is no longer eligible for disposition, then it will no longer be dispositioned on a consignment.

You can either make those changes yourself, or work with other agency staff to make those changes, as long as they have access to the records in Content Manager. Refer to guidance for [how to edit a digital folder](#) or [how to edit a box](#).



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