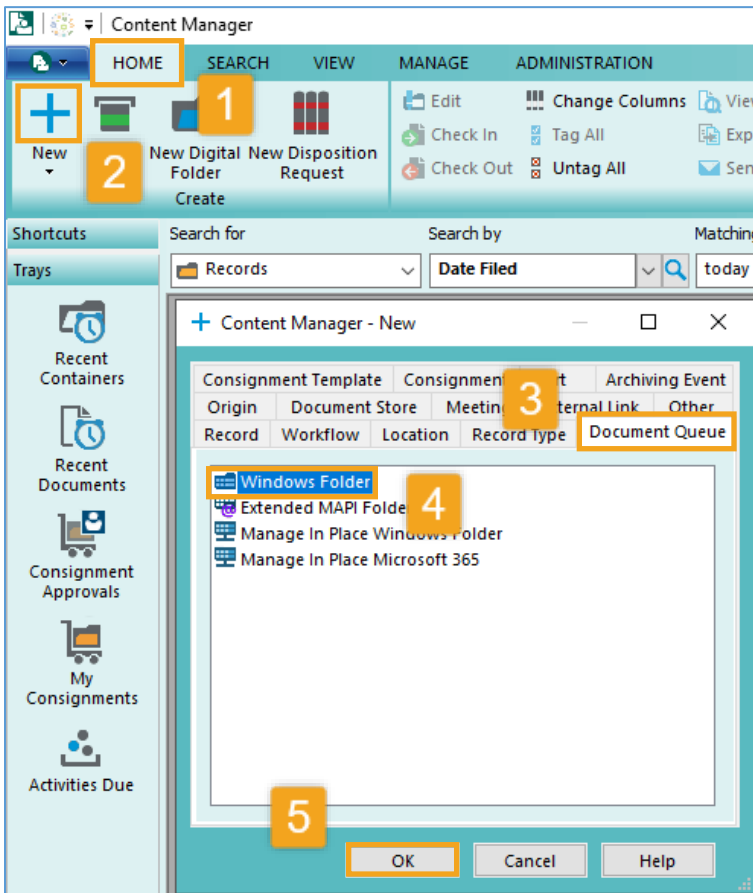




Content Manager Guidance

Document Queues - Creating

This is guidance for how to create Document Queues in Content Manager. Document Queues are an alternative to Dropzone for filing electronic records to Content Manager.



[Open](#) Content Manager (CM)

1. Click **HOME** tab
2. Click **Plus Sign (+)**
3. Click **Document Queue** tab
4. Select **Windows Folder**
5. Click **OK**

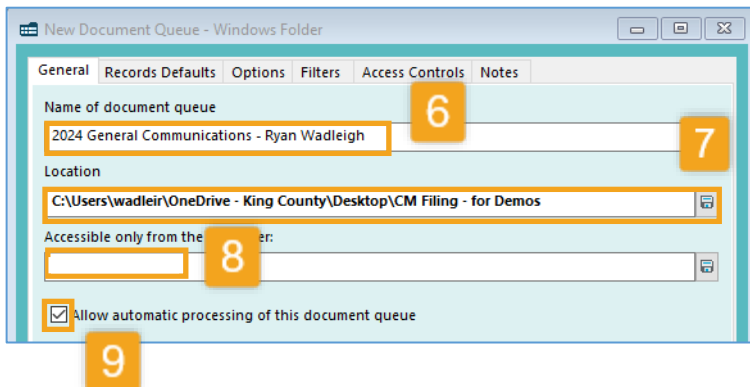
6. Enter the **Name of document queue** – be descriptive about what it will be used for and also **include your name as part of the title** (examples: “ABC Project – John Doe”, “2021 General Communications – Mary Smith”). If you get an error message when going to step 10, it means you need to choose a new title that is unique.

7. Enter the **Location** – this is the folder in your shared/network drive or OneDrive where records will be filed *from*. Click the icon to locate and select the correct folder. You can either link to an existing folder that already has records in it or create a new folder during this process.

8. Under **Accessible only from the computer** – this defaults to your computer. We recommend that you **erase** the computer name, and leave it **blank**

9. Put a **check mark** next to **Allow automatic processing...**

[continue to next page]





Content Manager Guidance

Document Queues - Creating

New Document Queue - Windows Folder

General **Records Defaults** Options Filters Access Controls Notes

Use a check in style for new records

Check In Style

Use the following settings for new records

Default record type: ERecord

Default container: DF638975

Default option for author: Current User

Specified author

To

Alternative container

10. Select the **Records Defaults** tab

11. Select Use the following settings for new records

12. For **Default record type**, enter or select **ERecord**

13. For **Default container** enter the **record number** for the folder in Content Manager where the records will be filed to (i.e. DF640177). If you don't know the record number, click the blue folder button to search for and locate the folder you need.

Note that the folder in Content Manager must already exist. If it does not, refer to job aid for how to [create a Digital Folder](#).

14. For **Default option for author** click the down arrow and select **Current User**

15. Select the **Options** tab

16. Change check marks to match what is at left. The **only** option that should be checked is **If possible, suppress entry form when creating new records**.

17. Under **After processing each document** click the down arrow to select **Delete the document**

18. Click **OK**

The Document Queue is now ready to use. Refer to separate job aid for how to [file to Document Queues](#).

New Document Queue - Windows Folder

General Records **Options** Filters Access Controls Notes

Automatically view the current document

When checking in all documents, ignore original documents

When a document is being processed:

Confirm check in action before continuing

If possible, suppress entry form when creating new records

After processing each document:

Delete the document

OK Cancel Help



RECORDS
MANAGEMENT