



# Content Manager Guidance

## What Can and Cannot Be Filed

This document describes details about what can or cannot be filed to Content Manager as an Electronic Record (i.e. electronic documents or files).

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### File Location

#### Emails

It is **only** possible to file emails from the **Outlook application**. It is **not** possible to file emails from the web browser version of Outlook.

#### All other documents

It is **only** possible to file all other documents from **File Explorer** (previously called Windows Explorer). By default, this includes all documents in **OneDrive**.

To file from a **shared or network drive**, first **Map the network drive** so that the drive and contents are viewable in File Explorer.

To file from **SharePoint or Teams**, first choose **Add shortcut to OneDrive** so that the contents are viewable in File Explorer.

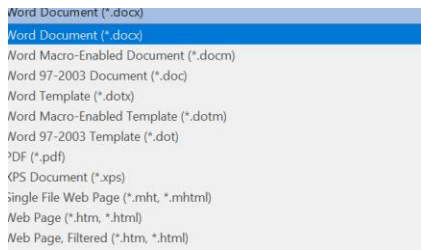
It is **not** possible to file directly from SharePoint, Teams or any other web browser or application.



### File Format

#### What is a file format?

A file format is a standardized way of storing information in a computer file. Common file formats are for text, images, audio, and web files. They are kept as file extensions, which tells the computer what programs can open the file. Common extensions are PDFs, JPEGs, and DOCX. Most people are familiar with changing the extension through the “save as” feature.



Even though records are based on the content of the record and not the format, some formats are more appropriate for some content. For example, photos are usually kept as image files.

#### Which file formats can be filed to Content Manager?

Most file formats can be filed to Content Manager. However, it is recommended to use common nonproprietary formats because they are more accessible. Here are some of the most common file formats and extensions.

<p><b>Text files:</b></p> <ul style="list-style-type: none"> <li>.doc</li> <li>.docx</li> <li>.pdf</li> <li>.rtf</li> <li>.txt</li> </ul> <p><b>Image files:</b></p> <ul style="list-style-type: none"> <li>.bmp</li> <li>.gif</li> <li>.jpeg</li> <li>.png</li> <li>.tif</li> <li>.tiff</li> </ul>	<p><b>Audio files:</b></p> <ul style="list-style-type: none"> <li>.mp3</li> <li>.wav</li> </ul> <p><b>Video files:</b></p> <ul style="list-style-type: none"> <li>.avi</li> <li>.mov</li> <li>.mp4</li> <li>.mpeg</li> <li>.mpg</li> </ul> <p><b>Presentation files:</b></p> <ul style="list-style-type: none"> <li>.ppt</li> <li>.pptx</li> </ul>	<p><b>Web files:</b></p> <ul style="list-style-type: none"> <li>.asp</li> <li>.htm</li> <li>.html</li> <li>.link</li> <li>.shtm</li> <li>.shtml</li> <li>.url</li> </ul> <p><b>Other:</b></p> <ul style="list-style-type: none"> <li>.xml</li> <li>.one</li> </ul> <p><i>many more!</i></p>
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The above list is not comprehensive, and just displays some of the most common examples. Contact Records Management if you have an extension or file format you want to know about.



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#### Which file formats **cannot** be filed to CM?

There are **only** a few types of files that Content Manager will reject if you attempt to file them:

Compressed Files (ZIP)	Records must be uncompressed to be filed to Content Manager. Extract/unzip the ZIP file first, and <i>then</i> file the contents.
Personal Storage Table files (PST)	Most county employees do not use PST records. First, open the PST file in Outlook and then file the emails after viewing them in Outlook.
Records without extensions	Parent folders, shortcuts, etc. cannot be filed directly to Content Manager.
Some corrupted or damaged records	If a record is corrupted or damaged, Content Manager will not recognize it. Work with IT to attempt to recover the record or contact the Records Management Program to determine the best next steps.



#### Which **should not** be filed to CM?

Although most files can be filed to Content Manager, we recommend against filing certain file formats:

- Non-records – The biggest example of formats you should not file to Content Manager are system or software files (EXE, etc.). These files may be used to access records, but they are not records themselves.
- Proprietary formats – Some formats are only accessible through specific software, making them more difficult to access, use, and share. Even if some records can only exist in specialized formats, such as GIS, CAD, etc., staff should still try to save these records in nonproprietary formats.
- Records that you cannot even open from File Explorer. This probably means that the file is damaged or corrupted and will not be accessible from Content Manager.
- [Transitory records](#)



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#### File Size

Technically there are no file size restrictions. However, we recommend individual files be **10 GB** or smaller. Records larger than that are difficult to file and could stress the server and your computer. They could also be difficult to get out of CM for requests or reference. Managing very large records depends on how much larger than 10 GB they are, their format, and retention period. Contact the Records Management Program for guidance, but some tips for filing very large files include:

- File early or late in the day, when there is less stress on the server
- File one record at a time
- Use document queues or Direct Drag-and-Drop method

#### File Encoding

Based on the software and file formats you use, the file is encoded in an automatic way and is something that people only need to change in very specific circumstances. The encoding does **not** affect the record's ability to be filed, indexed, or searched.



### File Names

Generally speaking, a document with any file name (title) can be filed to Content Manager. But there are a few exceptions and considerations.

In Content Manager, each title (file name) has a maximum **character limit of 254 characters**. But because File Explorer has a character limit of 256 characters and Outlook has a subject line character limit of 255 characters, this should never be an issue.

Overly long file names are always against best practice. Instead, best practice in general is to keep record titles less than 60 characters. Review our [Document Naming Conventions](#) and [Content Manager Naming Conventions](#) guidance for more considerations and best practice when naming documents.

In general, you should avoid using non-alphanumeric (or special) characters in document titles. But, there might be circumstances when special characters are necessary. The table below describes which characters can and cannot be included in a record title in Content Manager. Another consideration though is searchability; even if a document with a special character can be filed, it could affect its accessibility and searchability – especially if a future user does not know to use a particular character.

Special characters that <b>CANNOT</b> be in the title	Special characters that <b>CAN</b> be in the title
\ / ?   : * " < > ;	( ) % & # @ ! \$ , (comma) . (period) - (hyphen or en dash) _ (underscore) ^  Most non-Latin characters (Chinese, Russian, etc.)



### File Properties

When records are filed to Content Manager, they are fully indexed by the system. This process captures certain metadata fields and also broadly indexes all of the content and metadata. The table below describes how different document metadata is indexed and searchable in Content Manager.

<b>File Explorer (Windows)</b>	<b>Content Manager (CM) Metadata Field</b>	<b>Content Manager (CM) Search Parameter</b>
File Name	Title (Free Text Part)	Title Word
Date Created	Date Created	Date Created
Comments	Notes	Notes Word
Tags	Imported Tags	Imported Tags
File Format	Extension	Extension
Size	Size	Size
Source Location [File Path]	Source Document	Active Audit Events
Others (various)	Although not all properties are indexed by Content Manager into unique metadata fields, all metadata is broadly indexed by Content Manager and searchable using the Keyword Search parameter.	Keyword Search (searches across all content and most metadata)

See [Electronic Records Search Parameters and Field Crosswalk](#) for specific guidance on how to search the above metadata fields.