



# Content Manager Guidance

## Filing Electronic Records – Process Overview

This document is an overview of the entire process and all steps necessary to file any type of electronic document to Content Manager. If you have never used Content Manager before, start with [Getting Started in Content Manager](#). That page also contains links to all training resources.

### Step 1. Determine the appropriate retention category

Determine which **retention category** your records belong in. Many county emails are General Office Communications, but most employees also have records that belong in more specific categories. For questions, ask your [Records Management Lead](#) or consult your [retention schedule](#).



### Step 2. Create or locate a digital folder in Content Manager

If you need to create a Digital Folder, then [create it](#). If instead you need to use an existing folder, first find it in Content Manager and then [add it to Recent Containers](#).



Ask your [Records Management Lead](#) for best practice for your agency. Generally – if you are filing your own general communications or projects, you can create your own folder. But if you are filing records to a shared project or issue, you might use folders that someone else has created.

### Step 3. Choose a filing method (A, B or C) and then file the records

A. [Dropzone](#) (drag and drop) is better for **smaller** batches (less than 100 at a time)

B. [Direct Drag-and-Drop](#) is better for **larger** batches (more than 100 at a time), especially for **emails** and people who have **more than one computer monitor**

C. **Document Queues** ([Creating](#) and [Filing](#)) - better for **larger** batches (more than 100 at a time) of electronic records that are already stored in folders in File Explorer

If you need to file **emails**, we recommend you make an [Outlook setting change](#). If you are filing emails from a **shared mailbox**, we recommend that you first move the emails to **your individual mailbox** before filing. If you need to file from **SharePoint or Teams**, you will first need to [add a shortcut to OneDrive](#).

