



Content Manager Guidance

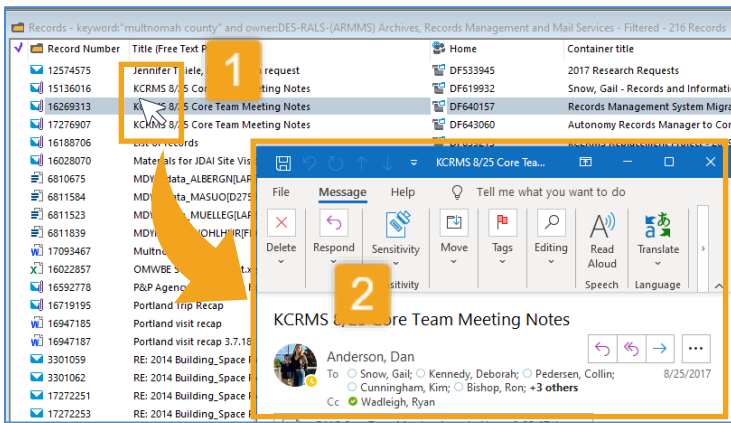
Opening, Exporting, and Emailing Electronic Records

This is guidance for how to **open or export records** in Content Manager. Refer to separate job aids for guidance on how to perform searches. All records that have been filed to Content Manager are fully accessible at any time until they have been dispositioned.

First, open Content Manager and perform a search to locate records. From there, refer to:

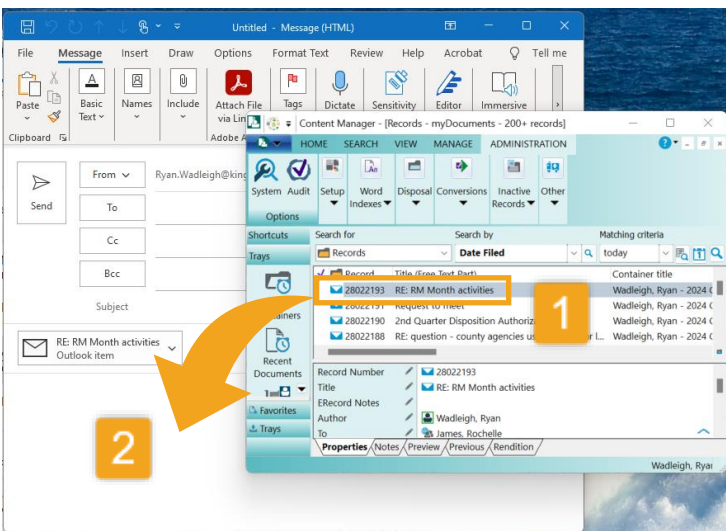
- 1 – open, export or email one record – page 1
- 2 – export/download records – page 2
- 3 – send records by email – page 3

These processes results in pulling access *copies* of records; and the originals are retained in Content Manager. It is against best practice to retain access copies for longer than the originals.



To Open One Record:

1. **Double click** on a record
(or select View on the Search tab)
2. It will **open in its native format** with its native application



To Export or Email One Record:

1. Select **one electronic record** in Content Manager
2. **Drag-and-drop** it either to a folder in **File Explorer** (if you want to save a copy in OneDrive) or an **Outlook** folder (if you want to save a reference access copy in Outlook)

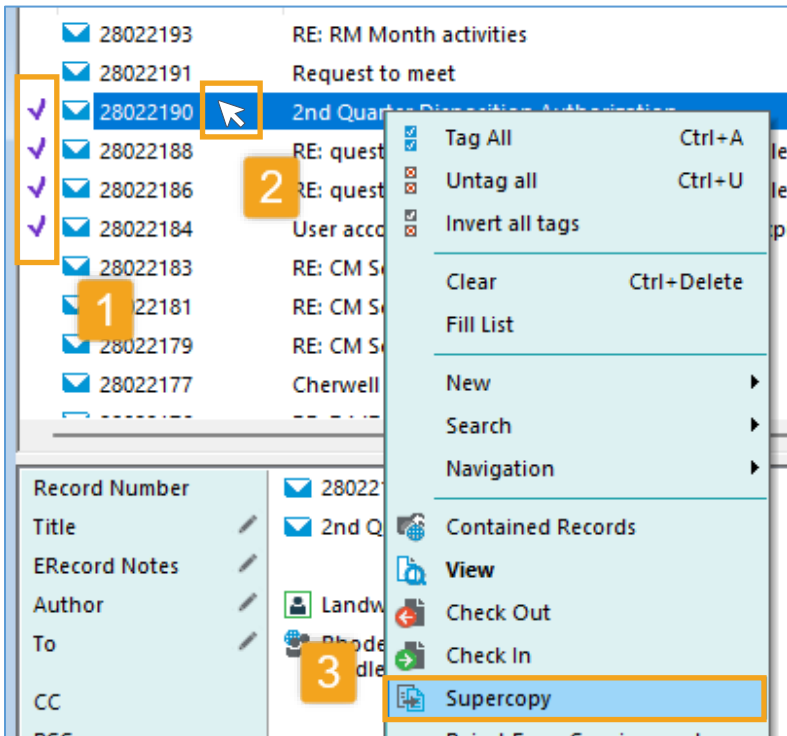
You can also **drag-and-drop** into a **blank email message**, which will allow you to send that record as an email attachment.





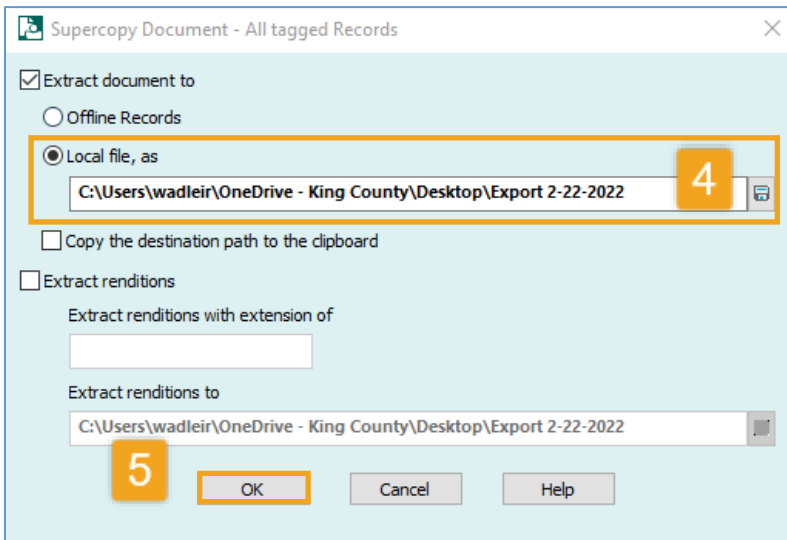
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To Export Records:

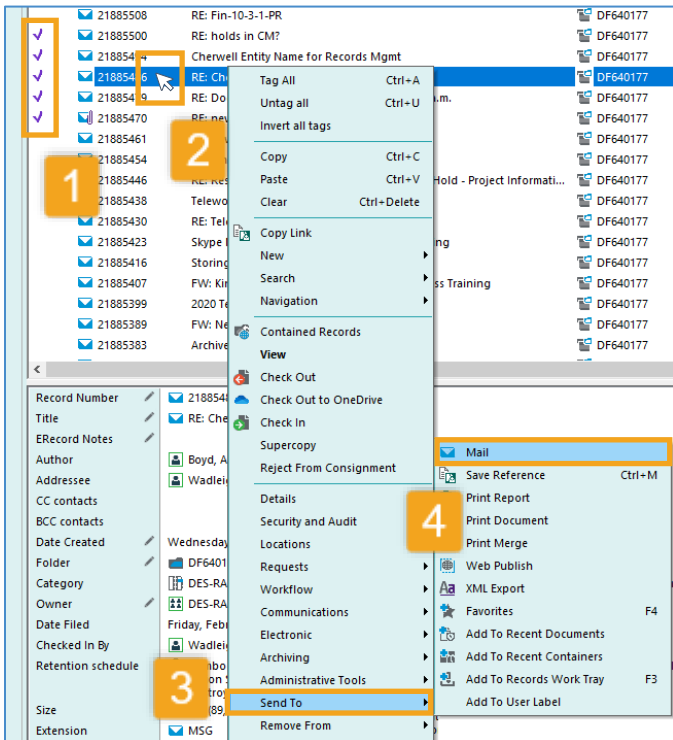
1. Click in the white space to the left of each record to place a **purple check mark** next to **all** records to be exported (or you can click *Ctrl + A* or *Tag All* on the *Search* tab to export all records in your search results)
2. **Right click** on any of the checked records
3. Select **Supercopy** (or select *Export Documents from Search tab*) and then select **OK** with “All Tagged Rows” selected
4. Under **Local file**, as choose a **folder** in File Explorer (i.e. OneDrive) to *export to* (do **not** change any other settings)
5. Select **OK** and then **Select Yes to All**





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To Email Records from Content Manager:

1. Click in the white space to the left of each record to place a **purple check mark** next to **all** records to email (or you can click **Ctrl + A** or **Tag All** on the **Search** tab to email all records in your search results)
2. **Right click** on any of the tagged records
3. Select **Send To**
4. Select **Mail** (Then select **OK** with “All Tagged Rows” selected)
5. Then choose either:
“Electronic document”
OR **“Content Manager record reference”**
6. Click **OK** and then **Yes to All**

A draft email message will open with either the electronic documents or the CM references embedded within the message.

Modify the subject line and body of the email message as needed. (You can also delete the files ending in .txt, which are separate metadata files for each record). Then press enter.

If the record(s) are too large to send by email, you might get an error message. An alternate way of sharing by email would be to export using Supercopy (see page 2), and then share from OneDrive.

