

Creating Folders in Content Manager

Before creating a folder, it is important to understand the **folder structure** within Content Manager and how they nest within one another.

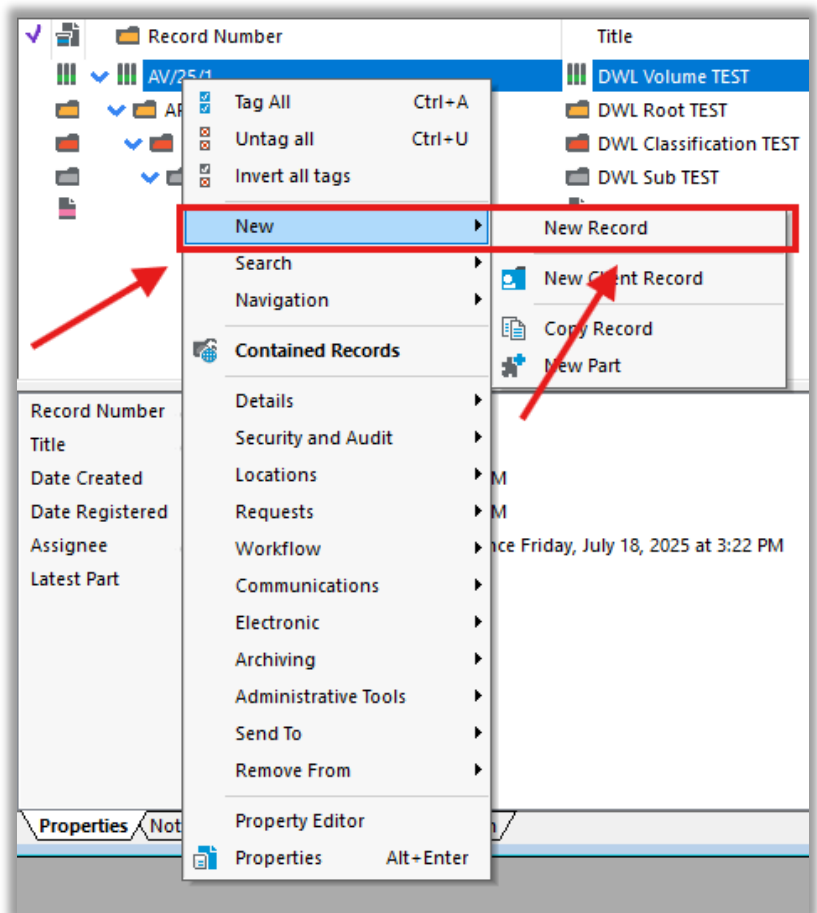
Volume > Root Folder > Classification Folder > Sub Folder > Document

Record Number	Title	Date Created
AV/25/1	DWL Volume TEST	07/18/2025 at 3:22:53 PM
ARF/25/2	DWL Root TEST	07/18/2025 at 3:23:29 PM
ACF/25/1	DWL Classification TEST	07/18/2025 at 3:23:36 PM
MOF/25/1	DWL Sub TEST	07/18/2025 at 3:23:56 PM
AV/25/88	DWL Doc TEST	07/18/2025 at 3:24:15 PM

Creating a New Folder:

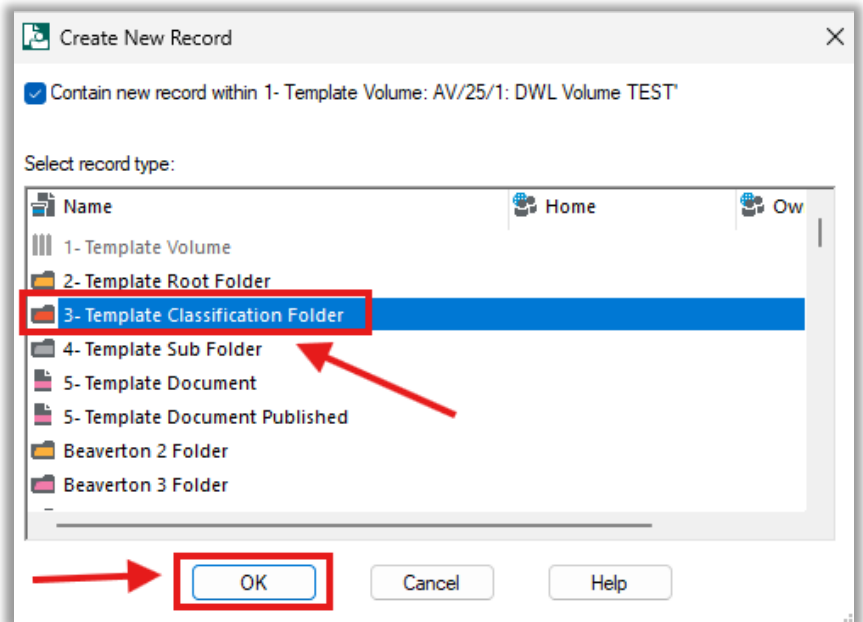
Step 1. RIGHT-CLICK on the folder you wish to create a new folder within.

Step 2. Hover your cursor over the **NEW** option, then click on **NEW RECORD**.



Creating Folders in Content Manager

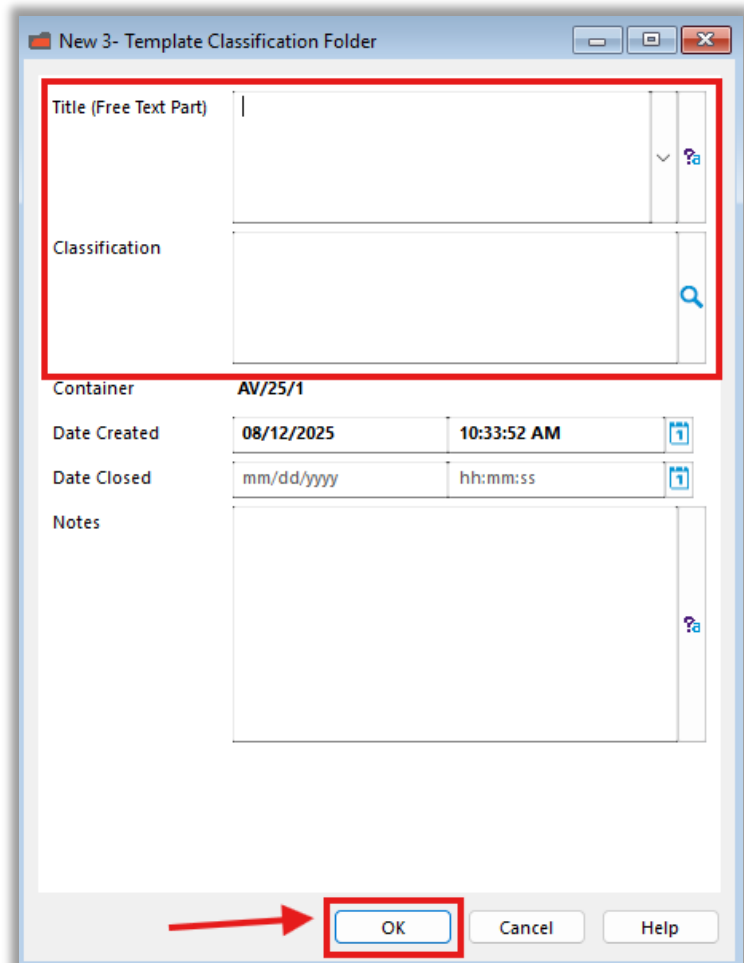
Step 3. In the pop-up window, select which type of Record you want to create, then click on the **OK** button.



Step 4. In the next pop-up window, title your new record by entering it into the Title Field. If your new record is a Classification Folder and requires a Retention Schedule, you can also add your Classification by clicking on the magnifying glass icon. (See next page)

Step 5. Click the **OK** button.

Your new folder has now been created.



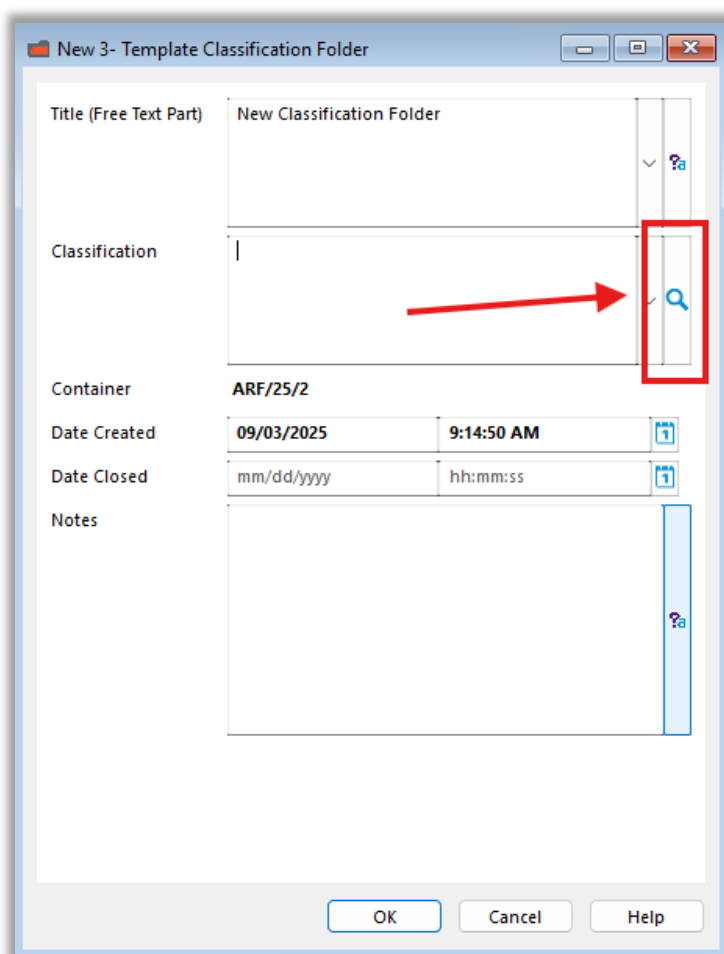
Creating Folders in Content Manager

Adding Classifications to Classification Folders:

When creating a **Classification Folder**, you will need to apply the correct retention schedule. If you are unsure of the retention of your record type, check for your agencies' general schedule on the Oregon Secretary of State website:

https://sos.oregon.gov/archives/Pages/records_retention_schedule.aspx

Step 1. On the New Record pop-up window, click on the magnifying glass icon within the Classification selection.



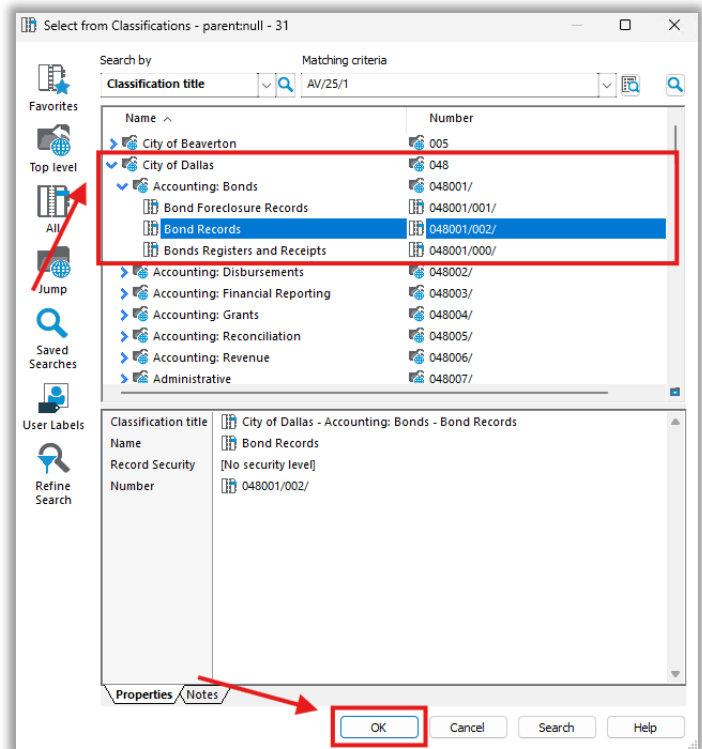
The screenshot shows a dialog box titled "New 3- Template Classification Folder". It contains several fields: "Title (Free Text Part)" with the value "New Classification Folder", "Classification" (empty), "Container" with the value "ARF/25/2", "Date Created" with the value "09/03/2025" and time "9:14:50 AM", "Date Closed" with the value "mm/dd/yyyy" and time "hh:mm:ss", and a "Notes" section. A red arrow points to a magnifying glass icon in the "Classification" selection area, which is highlighted by a red box.

Creating Folders in Content Manager

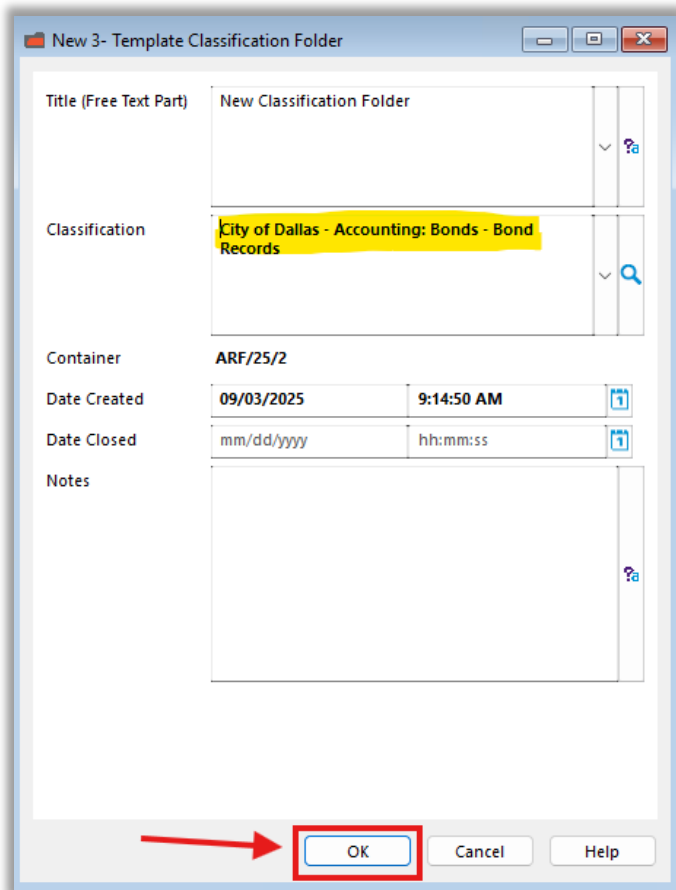
Step 2. In the new window, find your city in the listed selections, then select the appropriate Classification title.

Note: Click on the ▶ arrow icons to dial down through the retention schedules.

Step 3. Click on the **OK** button.



Step 4. Once your Classification is selected, click on **OK** button.



Creating Folders in Content Manager

Note: If you need more clarification on the retention schedule, click on **NOTES** tab for more detailed information.

