

Primary Audience: Information Workers

Date Registered

This is a time stamp of when the record was entered onto TRIM. **Date Registered** is entered automatically and cannot be changed.

Always de-select **Dates** when creating a new record by **Copy Record**. Otherwise the **Date Created (Opened)** from the original file will be the **Date Created** of the copied record.

Date Created (Opened)

For Electronic Documents this is the date the email or document was created. For Folders this is the date the record was available for material to be enclosed within. This is NOT necessarily the same as the date of the first material on the file (see **Content Start Date** below).

When a new folder is created, the **Date Created (Opened)** field will default to today's date. Information Workers can adjust the **Date Created (Opened)** at the time the folder is being created. To change the **Date Created (Opened)** field after it is created, send a TRIM Reference to [EDRMS Help](#).

When a new **Part** is created, the **Date Created (Opened)** is the date it was created. To adjust this day, send a TRIM Reference to [EDRMS Help](#).

Date Closed

For Folders, this is the date the record is no longer available for material to be enclosed within. This is NOT necessarily the same as the date of the last material on the file (see **Content End Date** below).

Note that when a new **Part** is created, the previous part will close automatically using that date.

All records having CY retentions are closed on December 31 of each calendar year.

All records having FY retentions are closed on March 31 of each fiscal year.

Records having SO retentions usually have a **Date Closed** the same as the **SO Date** (see below), but having them as separate fields allows them to be different dates.

The **Date Closed** of the **Latest Part** of a record triggers the retention schedule for CY and FY files.

It contributes to the triggering of the retention of SO files, but in conjunction with the **SO Date** (see below).

Content Start Date

This optional field is the date of the first material on the file. It can be adjusted at any time to accommodate legacy material being added after the file is created.

Content End Date

This optional field is the date of the latest material on the file. It can be updated at any time to accommodate material being added. **Content End Date** is not used to trigger the retention schedule.

SO Date

This is the date at which the folder becomes superseded or obsolete as defined by the SO statement in the relevant secondary classification. The same SO Date should be entered for every Part of the folder.

The retention of SO records is triggered by the later of the **SO Date** or the **Date Closed** of the **Latest Part**.