Date Changes and Date Fields in EDRMS Content Manager

Date Changes:

To change the **Date Created** or **Date Closed** fields after they have been entered, users must send a request with an EDRMS Content Manager Reference to EDRMS.HELP@gov.bc.ca .

To update the **SO Date:** Right click on the folder, select **Details**, **Additional Fields**, double click **SO Date**, change or remove the date, Click **OK** to save.

Date Fields:

1. Date Registered:

   Is a date/time stamp that is automatically generated when the record was first put into EDRMS Content Manager.

2. Date Created (Opened):

   When a record was physically created. The Date defaults to today's date when creating a new folder and can be adjusted at the time of creation.

   Physical and Electronic Folders: Date folder was created. This could be different from the start date of content in the folder.

   Electronic Documents: Date actual document was created. For emails it will be the date of the email and for documents the last date modified prior to uploading into EDRMS.

3. Date Closed**:**

   Folders**:** the date a folder is no longer available for material to be enclosed in/added to.

   Boxes**:** the date the box was completed and ready for offsiting or destruction.

   Calendar Year (**CY**) retentions are closed on December 31 of each Calendar Year.

   Fiscal Year (**FY**) retentions are closed on March 31 of each Fiscal Year. Date stamps should not be used. (e.g FY19 = 2018-04-01 to 2019-03-31)

   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 SO file retention, but in conjunction with the **SO Date** (see below).

4. SO Date (Superseded/Obsolete):

Date the folder becomes superseded or obsolete. This is defined by the SO statement in a classification.

The same SO Date should be entered for every Part of a folder. See **Tip 007 Creating a New Record Part for P-Folders** or **Tip 016 Electronic folders and Parts** for more information on parts.

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