Creating a New Record Part for Physical Folders

NOTE: When a physical folder (P-Folder) becomes too full it is necessary to create a new part to keep using it. The original record number is applied to the new part, and a relationship is established that automatically links the parts together. You can create multiple parts for one record. Parts are indicated by a tilde ~01, ~02 etc at the end of the record number.

To create a new part for a record (only P-Folders):

- 1. Locate the folder for which you want to make a new part.
- Ensure that the folder is not closed. If there is a closed date, email <u>EDRMS.help@gov.bc.ca</u> and request the closed date be removed before proceeding.
- 3. Right click on the file, select New and then New Part.

Content Manager HOME SEARCH VIEW MANAGE ADMINISTRATIC Record Types Actions Classifications Requests Thesaurus Terms Records				Tag All Ct Untag all Ct Invert all tags Ct Cut Ct Copy Ct Clear Ctrl	trl+A rrl+U trl+X trl+C elete	Holds	Barcode Scanners Census Control Barcodes Physical
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4. The **Create New Part** popup is displayed:

Create New Part - ARCS-06450-80/24012A
Ocate new part with previous part
Move new part to new location
Move new part and previous part to new location
New part location
Copy notes
OK Cancel Help

- 5. **Select Locate new part with previous part** this puts the new part in the same location as the previous part.
- 6. **Copy notes:** check this box if you want to copy the notes from the original record/part to the new part.
- 7. Click OK.

EDRMS Content Manager will automatically close the previous part by adding a **Date Closed.**

To view all parts of a record:

- 1. Right click on the record with parts
- 2. Under Navigation then select All Parts.

Note: The closed and opened date for parts are in real time.

Changes can only be made to the **Date Created(opened)** of the first part, and the **Date Closed** of the last part. The dates that are in between do not affect disposition of the file and only indicate when a new one is made. The closed date on the last part and the SO dates, if applicable (SO dates should all be the same as the SO date entered on the final part) are what triggers the disposition on the records.

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If other dates need to be recorded:

- 1. Right click on the record
- 2. Select **Details**
- 3. Then Additional Fields
- 4. Double click on the Content Start & Content End Dates.
- 5. Input the dates needed.

ab Additional Field	Value			
1 Content End Date				
1 Content Start Date				
Aa Contract				
Aa Destruction Number				
Aa Hardcopy Media Type	選 PAPER - FILE FOLDER			
Aa Information Security Label				
늘 Label Printed?	No			
늘 Linked (E and P folders)?	No			
Aa Prior Legal Custodian (GRS USE ONLY)			
Aa Prior Record Type (GRS USE ONLY)				
Aa Project				
Aa Provenance				
Record Conversion No.	0			
Aa Retrieval Code				
1 SO Date	2005-12-31			
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Moving P-Folder parts into a Container (Folder/Box):

If you are adding P-Folders with parts into a box for offsiting or destruction, you are only able to add the **last part** of the file into the box. To move the earlier parts, please email <u>EDRMS.help@gov.bc.ca</u> to request they also be added to the box as all parts should be dispositioned together.

If you require assistance with managing parts, disposition processes and your records, please contact your records team at <u>GRS@gov.bc.ca</u>