

## Managing Electronic Folders with Parts

As of September 15, 2022, all new electronic Folders in EDRMS Content Manager automatically create new parts after 300 documents are filed within them. This ensures the best performance of EDRMS searching, indexing, and dispositioning.

### Electronic folders created prior to September 15, 2022

Existing electronic folders will not be impacted by this change, only newly created folders.

### Disposition of Electronic folders with parts:

All parts of a folder are considered one record with respect to disposition and should be managed as such. **EDRMS Help** does not update anything other than the date created on the first part and the closed date on the last part. The dates that are in between do not affect anything regarding 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, are what triggers the disposition on the files. SO dates should all be the same as the SO date entered on the final part.

Parts should only be used for single Calendar (CY) or Fiscal (FY) year folders and not parted by multiple years which would prolong the final disposition of the file.

Record Type	Record Number	Title (Free Text Part)	Date Created (Opened)	SO Date	Date Closed	Date Due for Archive (FR/SR)
✚ CITZ CIRMO GOVE...	ARCS-06450-80/43622A~001	Parts are Fun	<u>2019-01-01</u>	2022-08-16	2022-08-16...	2024-08-16
✚ CITZ CIRMO GOVE...	ARCS-06450-80/43622A~002	Parts are Fun	2022-08-16 at 7:51 AM	2022-08-16	2022-08-16...	2024-08-16
✚ CITZ CIRMO GOVE...	ARCS-06450-80/43622A~003	Parts are Fun	2022-08-16 at 7:52 AM	2022-08-16	<u>2022-08-16</u>	2024-08-16

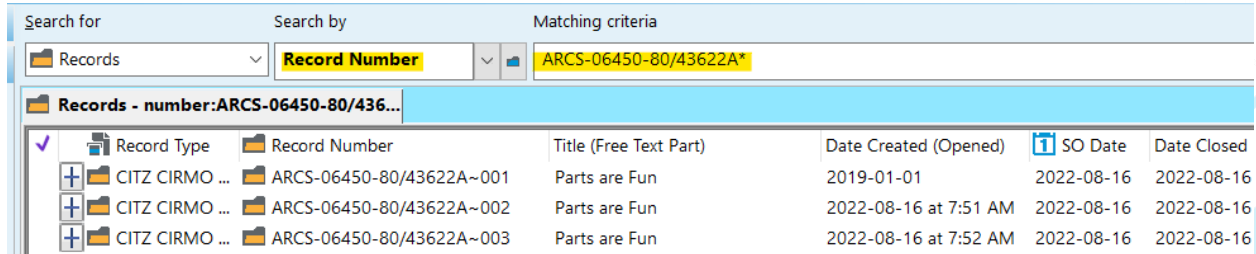
### Moving E-Folder Parts into a Container (Folder/Box)

If you are adding E-Folders with parts into a box for off siting or destruction, you are only able to add the **last part** of the file into the box and it must have a disposition of **Semi-Active**. To move the earlier parts, please email [EDRMS.help@gov.bc.ca](mailto:EDRMS.help@gov.bc.ca) to request they also be added to the box as all parts should be dispositioned together.

## EDRMS CONTENT MANAGER TIP 016

### Searching for all parts:

Parts are easily distinguished by looking at the record number. The tilde (~01 or ~001) at the end of the record number is the indicator. When searching for all parts of a folder, a search by "**Record Number\***" will bring up all parts.

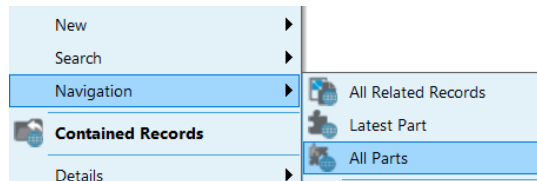


Search for	Search by	Matching criteria
Records	Record Number	ARCS-06450-80/43622A*

Record Type	Record Number	Title (Free Text Part)	Date Created (Opened)	SO Date	Date Closed
CITZ CIRMO ...	ARCS-06450-80/43622A~001	Parts are Fun	2019-01-01	2022-08-16	2022-08-16
CITZ CIRMO ...	ARCS-06450-80/43622A~002	Parts are Fun	2022-08-16 at 7:51 AM	2022-08-16	2022-08-16
CITZ CIRMO ...	ARCS-06450-80/43622A~003	Parts are Fun	2022-08-16 at 7:52 AM	2022-08-16	2022-08-16

Another way to show all parts of a folder is to right click on one, Select **Navigation, All Parts**



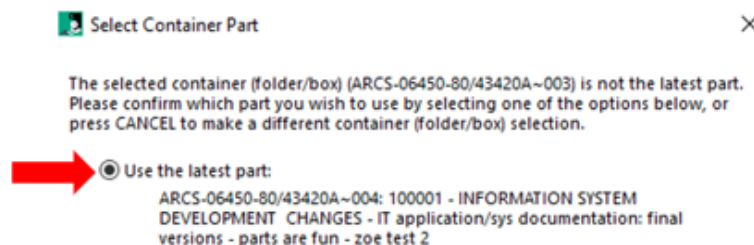
### Filing Documents into Folders with Parts:

Once a part is closed and a new part created you can no longer file into that previous part. The closed date of the previous part will be the date created for the new part. The +plus sign beside the closed folder indicates that it has contained records.



Record Type	Record Number	Title (Free Text Part)	Date Created (Opened)	SO Date	Date Closed
CITZ CIRMO ...	ARCS-06450-80/43622A~001	Parts are Fun	2019-01-01	2022-08-16	2022-08-16
CITZ CIRMO ...	ARCS-06450-80/43622A~002	Parts are Fun	2022-08-16 at 7:51 AM	2022-08-16	2022-08-16
CITZ CIRMO ...	ARCS-06450-80/43622A~003	Parts are Fun	2022-08-16 at 7:52 AM	2022-08-16	2022-08-16

If you try and file into a closed folder part, a pop-up will appear directing you to use the most recent part that is open. Select **OK** to add it to the latest folder part that is open.



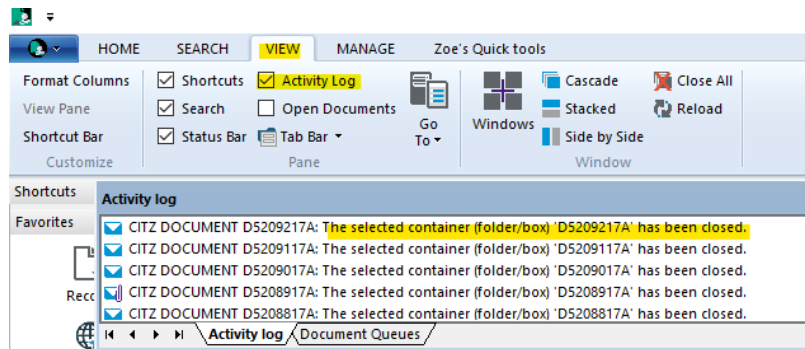
**Note:** once the rule has been used and a new part is created the previous part will no longer show the rule as it is now closed. The rule will remain in affect as long as the file has a part that remains open and will continue to add the rule to all subsequent parts automatically.

## EDRMS CONTENT MANAGER TIP 016

### Bulk Loading Documents:

When filing a lot of documents at once, the electronic folder may sometimes accept more than 300 documents before closing. This is due to the event processor and server being out of sync with such a large upload. It is okay if the rule allows more than 300 documents in it before it closes in this instance.

Once it closes if there were remaining documents waiting to be loaded, you will receive an error on the **Activity Log** found on the **View** tab, indicating that they could not be added as the folder was closed. The new part will have been created though so you can now file the remaining documents that were over the 300 limit into the newly created part.

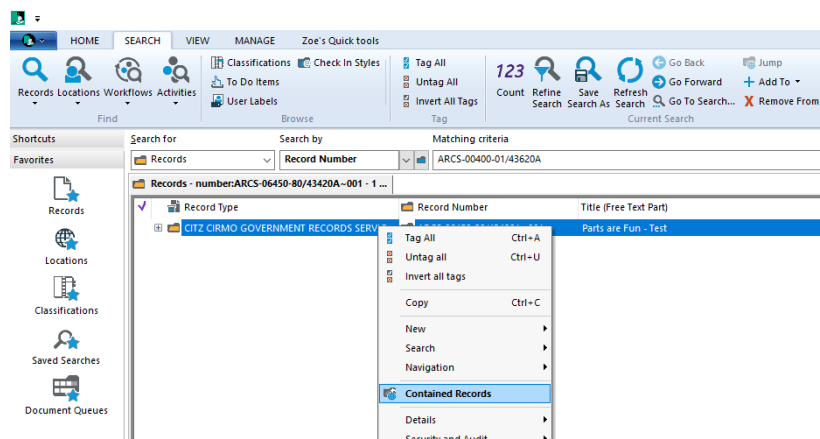


### HPE Content Manager Add-In and Outlook Check In Styles:

If you use the **HPE Content Manager Add In** and Outlook and create a linked **Check-In Style** that automatically files to an electronic folder, the system will create a new part automatically and the **Check In Style** will be updated as well, making it a seamless transition from one part to another for ease of filing in Outlook.

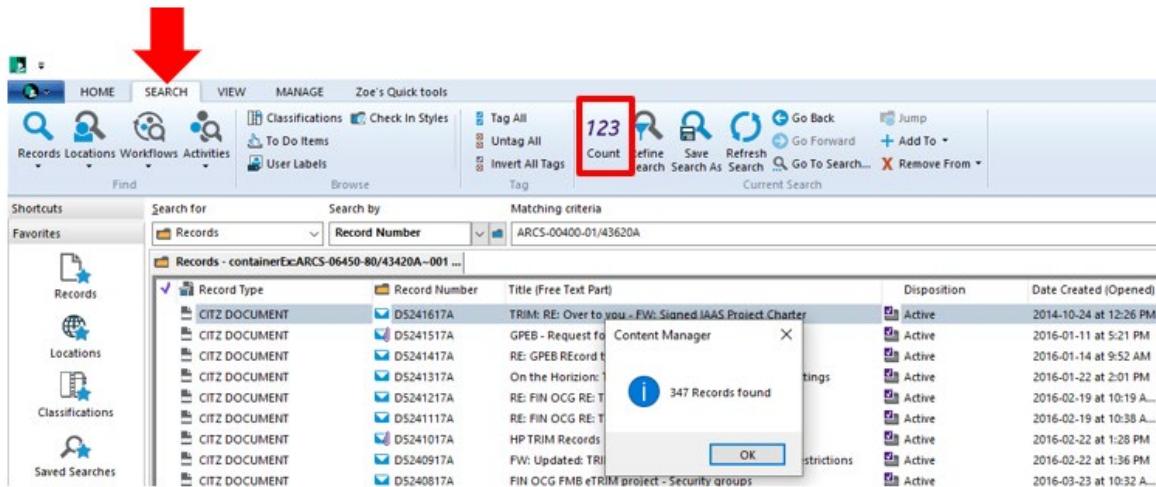
### How to check the number of documents contained in an electronic Folder:

1. Locate the folder you would like to count.
2. Right-click on it and select **Contained Records**



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3. The contained records of the electronic folder will now be listed.
4. Go to the **Search tab** and select **123 Count**. A pop-up window will appear, after the count is complete, displaying the results.



If you require assistance with managing parts, disposition processes and your records, please contact your records team at [GRS@gov.bc.ca](mailto:GRS@gov.bc.ca)