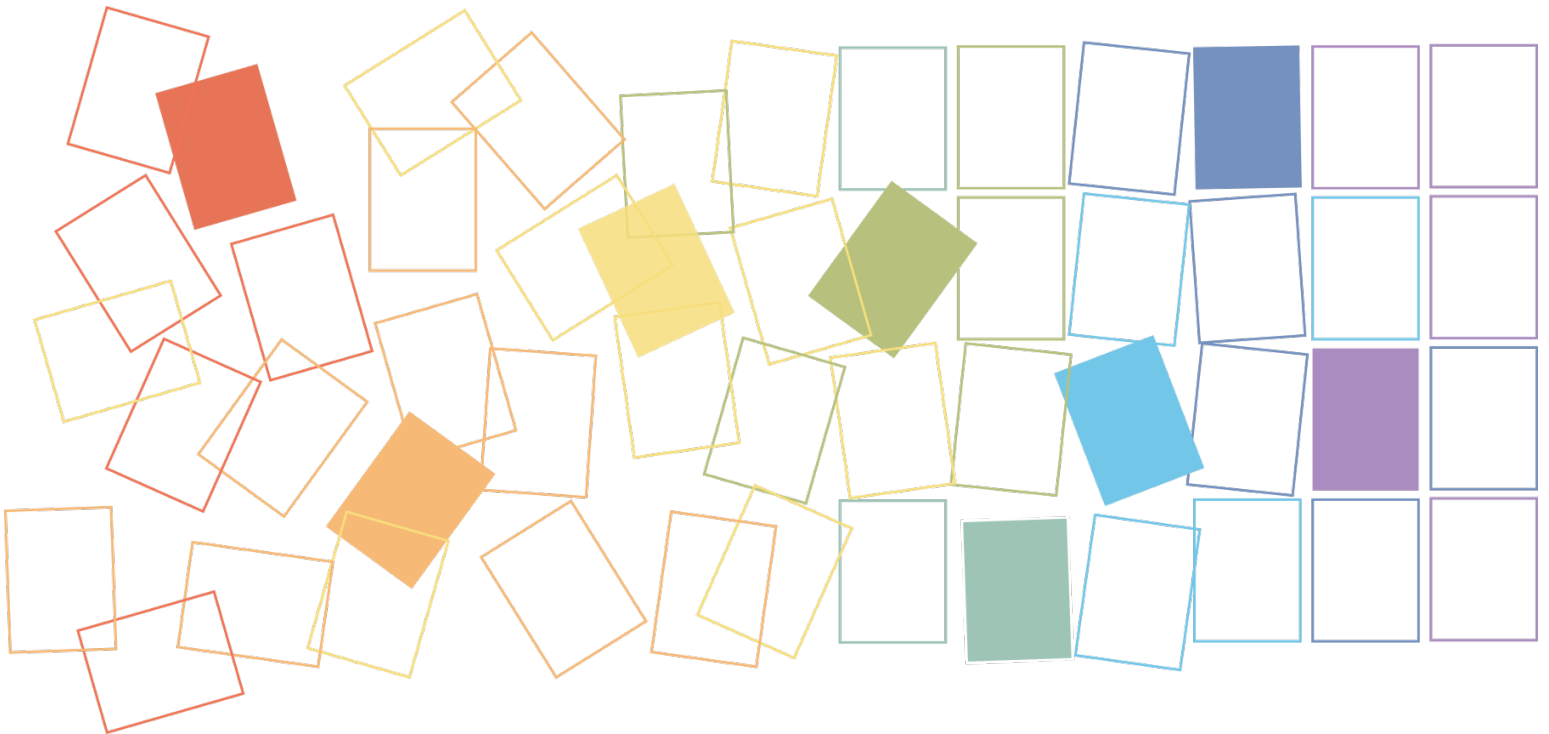


EDRMS Content Manager Onsite Disposition Manual for Electronic Folders and Physical Folders

EDRMS Content Manager version 9.2.1

August 2023



Ministry of
Citizens' Services

Government Records Service, Province of British
Columbia

REVISION HISTORY

DATE	VERSION	CHANGES	AUTHOR
2009-03-02	1.0		Corporate Records Management Branch
2010-08-25	2.0	Complete update for TRIM 6.5.2	Information Access Operations
2012-12-04	3.0	Complete update for TRIM 7.2.1	Information Access Operations
2015-03-23	4.0	Split folder management into two separate manuals: 1) offsite transfer and 2) onsite disposal	Government Records Service
2015-10-07	5.0	Minor corrections, clarifications about parts and SO dates	Government Records Service
2022-05-01	6.0	Updated to EDRMS Content Manager version 9.2.1 and as part of RDSC project to include electronic folder disposition process, updated screenshots	Government Records Service
2023-08-08	7.0	Update to section 13.4. Notification of destruction sent to EDRMS Help team.	Government Records Service

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1. ONSITE DISPOSITION OF EDRMS CONTENT MANAGER FOLDERS

This procedure covers managing onsite disposition of EDRMS Content Manager physical folders and electronic folders eligible for destruction. It reflects Government Records Service (GRS) recommended best practice.

Prerequisites: You are an EDRMS Content Manager Information Worker with experience creating and managing EDRMS Content Manager folders.

You understand ARCS/ORCS classifications and retention schedules. You have completed EDRMS Content Manager Information Worker (ITEM-1020) and EDRMS CONTENT MANAGER Disposition Processes (ITEM-1288) e-learning modules.

1.1 This procedure covers

- Scheduled records with approved classifications/retentions
- EDRMS Content Manager physical folders eligible for destruction that are located onsite at client location
- EDRMS Content Manager electronic folders eligible for destruction

1.2 Not covered

- Unscheduled records (under a draft classification/retention period)
- EDRMS Content Manager folders scheduled for Selective Retention (SR) or Full Retention (FR).
- EDRMS Content Manager physical folders that track records stored under GRS assigned accessions in offsite storage facilities; and that are being destroyed from storage. GRS coordinates destruction of records from storage.

1.3 Alternatively contained folders are also known as **hybrid folders**. They are used by some staff to show a relationship between an electronic folder and a physical folder. Hybrid folders move through their lifecycle together as a single record.

If you are planning disposition on physical folders, you must first verify if there are any folders which are alternatively contained with a physical folder. To verify, navigate to the properties --> related record tab or display the **Alternative container (folder/box)** column in your list pane.

If you are planning disposition on electronic folders, you must first verify if there is a related physical folder. To verify, open the electronic folder to see the physical folder that is alternatively contained within it.

Ensure that records are related prior to destruction of either physical folders or electronic folders, as these will move together through the disposition process. An Information Destruction Authorization can include physical folders,

electronic folders and alternatively contained folders. The Preparer should pay close attention to which aspects of this process relates to physical folders, electronic folders and alternatively contained folders.

1.4 Empty electronic folders. If your electronic folder is empty (i.e., does not contain any documents), please send a deletion request to EDRMS.HELP@gov.bc.ca. Maintain either a User Label or an EDRMS reference for empty folders; the best practice is to add the word EMPTY or DELETE to the folder title. We recommend you save up several empty folder references before submitting the request.

1.5 Parts If you are managing onsite destruction of an EDRMS Content Manager folder that has multiple parts, remember that EDRMS Content Manager manages all the parts as a single file. This means that all parts are scheduled together, according to the closed date of the last part. See appendix for further information.

2. OBTAIN DESTRUCTION NUMBER FROM YOUR DESTRUCTION COORDINATOR

Request an Information Destruction Authorization (IDA) Number) as it will be needed for data entry when creating your boxes.

The Destruction Number identifies the group of folders processed for onsite destruction. The Destruction Number is the IDA number that you received from your Ministry.

3. CREATE EDRMS CONTENT MANAGER USER LABEL(S)

EDRMS Content Manager User Labels are a useful way to keep a list of folders organized while processing them for onsite destruction. (See [EDRMS TIP 033](#))

NOTE: The term **EDRMS User Labels** may be misleading. User labels are not printed labels. User Labels are electronic work trays that allow you to search and sort a group of folders **once** and then retrieve the group of folders as needed.

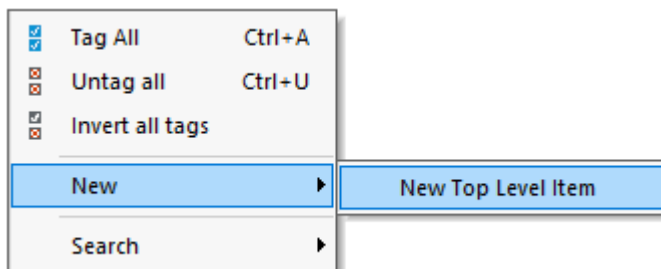
NOTE: You can only see the user labels that **you** create. Other Information Workers must create their own user labels if working on the same onsite destruction action. The same folders can be linked to different Information Workers' user labels.

3.1 Create new user label

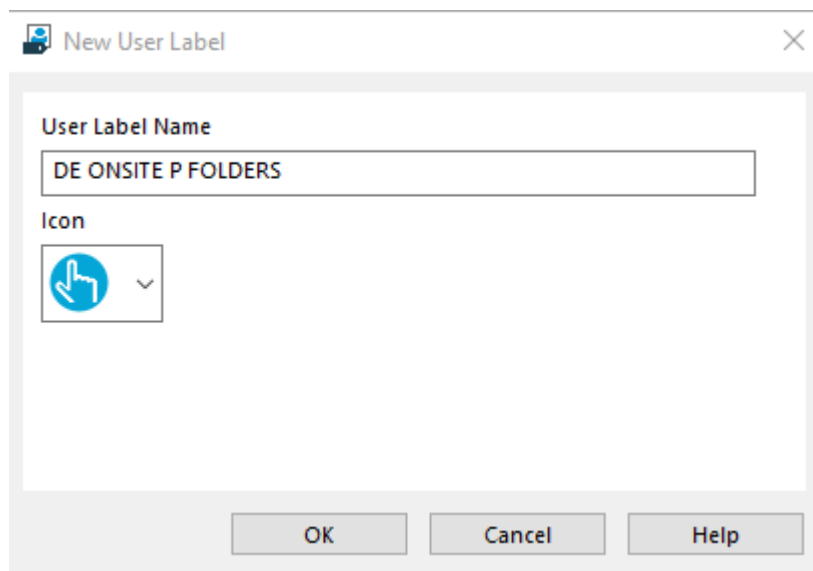
- **Shortcuts | Trays**
- Click on **User Labels** icon



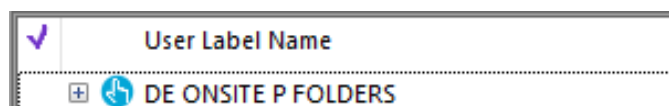
- **Right click** anywhere in list pane
- **New | New Top Level**



- **New User Label** window appears
- **User Label Name:** enter a title that works for you (see example)
- Add **Icon** (optional)
- **OK**



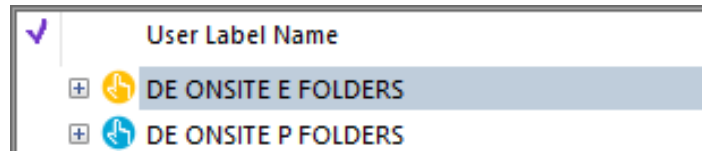
You have created a new user label



3.2 Repeat to create more user labels

NOTE: recommend putting physical folders and electronic folders in separate user labels to keep them organized through onsite destruction process.

NOTE: See Appendix for instructions on alternatively-contained folders.



4. SEARCH FOR FOLDERS ELIGIBLE FOR IMMEDIATE DESTRUCTION

To be eligible for onsite destruction, folders must have a **Closed Date**, **SO Date** (if applicable), and status of **Semi-active**. The search described below only returns folders meeting these criteria. If your records do not have a closed date, determine the closed date in consultation with the records creator and enter a closed date. If your records do not have an SO date, determine the SO date in consultation with the records creator and enter an SO date.

NOTE: Sort and send folders to user label **before** running another search.

4.1 Search | Find Records (Ctrl F) opens **Search for Records** window

4.2 Search tab

- **Search By** = Owner | **Location** = EDRMS Content Manager Owner
Location name

NOTE: If you manage EDRMS Content Manager records for multiple branches, ensure you are searching by correct Owner. Owner is the organization who has created the records and/or has the current legal custody of the record.

Search for Records

Search Filter Record Types Sort Results Options

Search By
Owner

Enter the Location to search by
CITZ CIRMO GRS EDRMS Services

☐ Recursive

Your Owner location name goes in the "Location" Field

Select search style for Location
An individual Location

☒ AND ☐ OR New Insert Delete (...) NOT Reset

owner:CITZ CIRMO GRS EDRMS Services

OK Cancel Open Editor Help

4.3 Filter tab

- Uncheck all disposition checkboxes except **Semi-Active**
- In **Within another Saved Search** field add **Onsite DE approved** search

NOTE: do not skip this saved search or search results will be incorrect.

Search for Records

Search **Filter** Record Types Sort Results Options

Records with Disposition:

- Active
- ☒ Semi-Active
- Archived (FR/SR)
- Destroyed
- Archived (Custody Transferred)

Records with Record Class:

- ☒ Vital
- ☒ Corporate
- ☒ Workgroup
- ☒ Personal
- ☒ Reference
- ☒ Temporary

Records with Date Registered Within: [] Days

☒ Unfinalized

☒ Finalized

File Types (enter a list of file types separated by ';')

Within another Saved Search

☒ Onsite DE approved

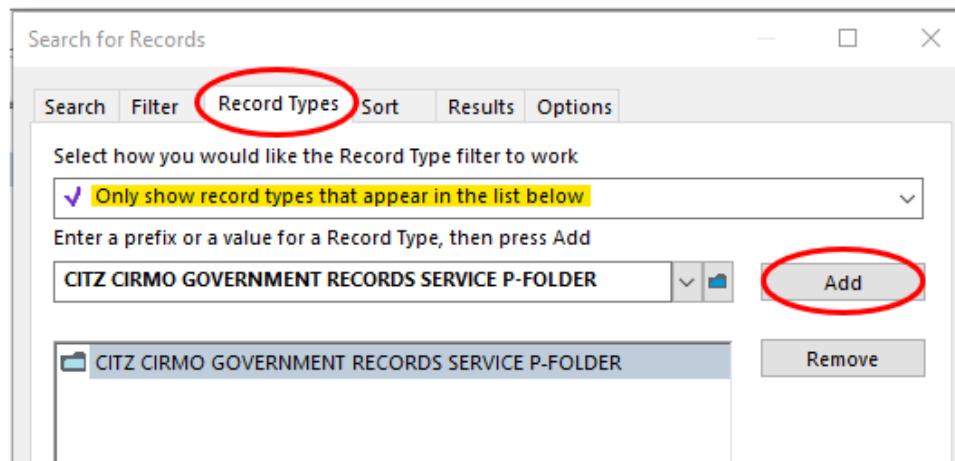
☐ Save as Default Filters

OK Cancel Open Editor Help

4.4 Record Types tab

- In **Select how you would like the Record Type filter to work**, select **Only show Record Types that appear in the list below** from drop down menu
- In **Enter a prefix of a value for a Record Type**, then press **Add**, enter appropriate e-folder **OR** p-folder record type | **Add**
- **OK** to run search

NOTE: Do separate searches for physical folders and electronic folders to reduce confusion.

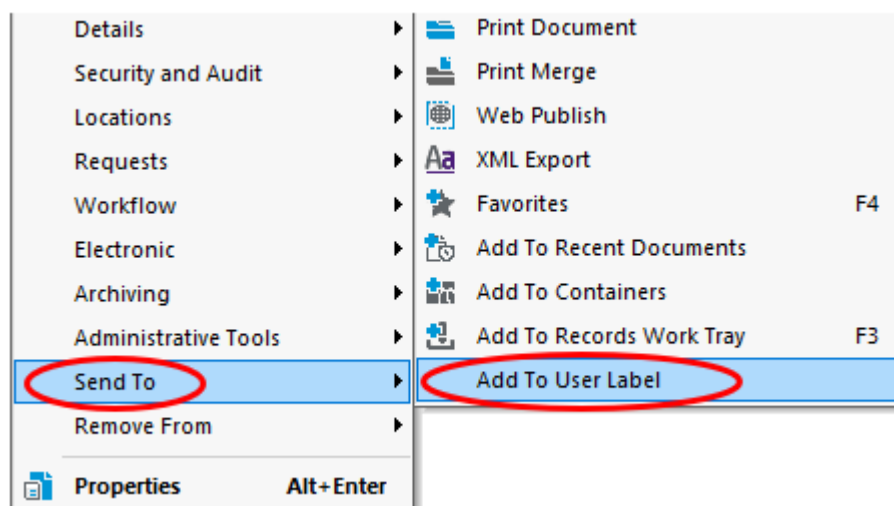


5. SEND FOLDERS TO USER LABEL

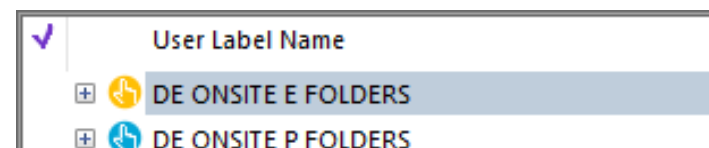
5.1 Send folders to correct user label

If you want the folders sorted in a specific way in your user labels (i.e., by Title, Retrieval Code or Date), remember to sort the folders first and then tag to send to User Label.

- **Tag all | Send to | Add To User Label**



- **Double click** on user label



- **Yes to All**
- You have added the folders to the user label
- Repeat as needed until all folders are in appropriate user labels



5.2 Retrieve user label and display folders

To retrieve user label(s) after you created them

- **Shortcuts | Trays | User Labels**
- **Right click** in list pane | **Show Records** or double click on user label

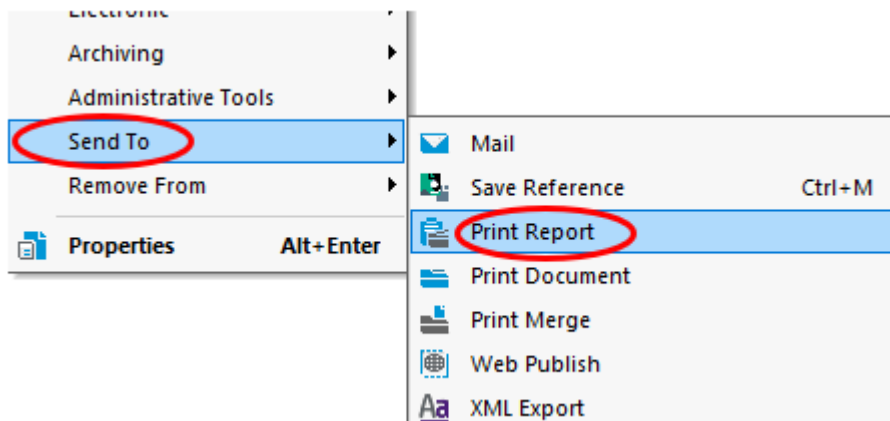
6. PHYSICAL FOLDERS ONLY - CREATE A PULL LIST

You will need to locate and remove your p-folders from shelves. The **GOV BOXING ELIGIBILITY REPORT** provides a pull list of your eligible physical folders.

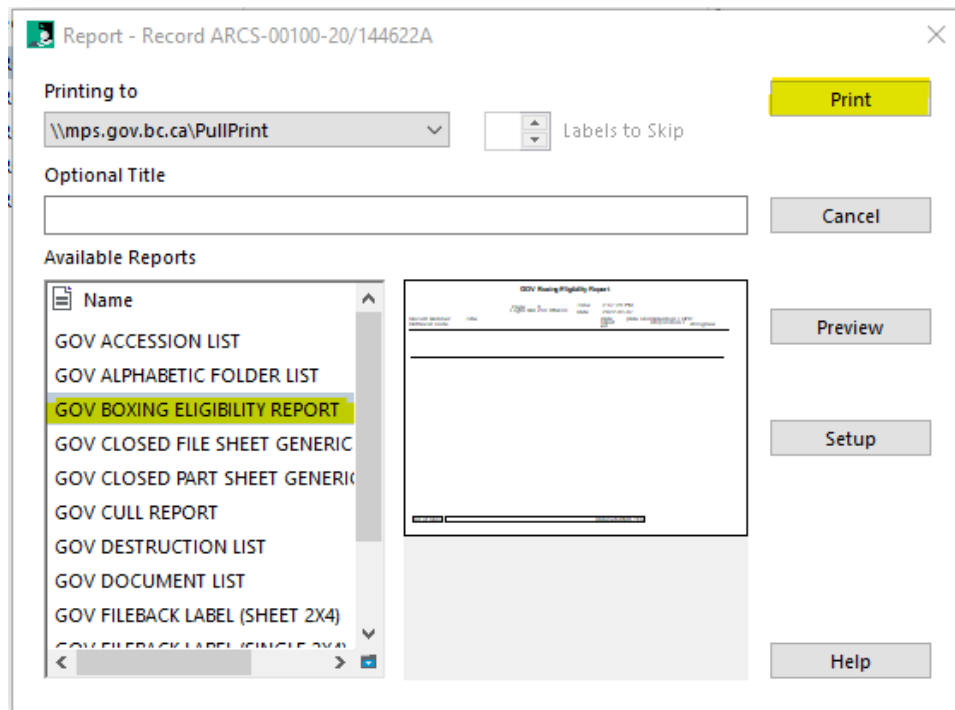
6.1 Set up report

First, return to the User label you created for eligible **physical folders**. The user label holds the search results from Section 4 (above)

- Right click on User label | **Show Records** | or double click on user label
- (optional) Sort the physical folders in the user label in whatever order will assist you to locate and pull them from shelves
- **Tag All**
- Right-click --> **Send to** --> **Print Report**



- Select **GOV BOXING ELIGIBILITY REPORT**
- Select printer | **Print** a hardcopy report



6.2 How to use the report

The purpose of the report is to provide a hardcopy list of eligible physical folders for reference while pulling folders from shelves.

- Annotate the report with the DE box number in which each physical folder is placed **NOTE:** Put physical folders into physical boxes **before** creating EDRMS Content Manager DE boxes to make it easier to match EDRMS Content Manager data to physical location of folders.

6.3 Missing physical folders

- Note missing physical folders on the report and update EDRMS Content Manager (see Appendix)
- Remove missing physical folders from the user label (see Appendix)

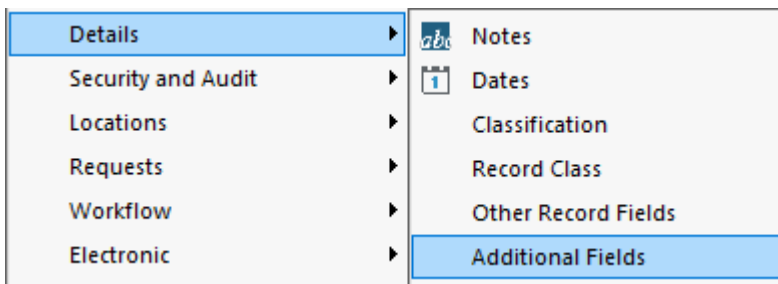
7. ELECTRONIC FOLDERS ONLY

Your electronic folders have been added to the electronic folder user label in step 5 above. There is no need to create a report of these records.

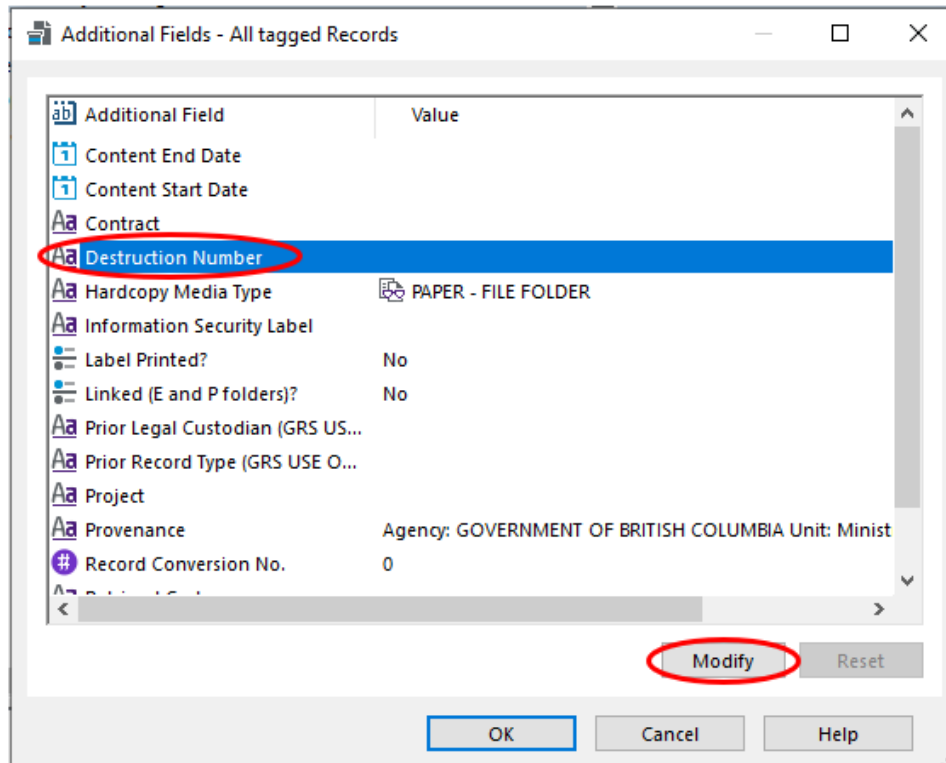
8. ADD DESTRUCTION NUMBER TO FOLDERS

Adding the Destruction Number (Information Destruction Authorization) number to each folder allows users to search for folders that were part of an onsite destruction action.

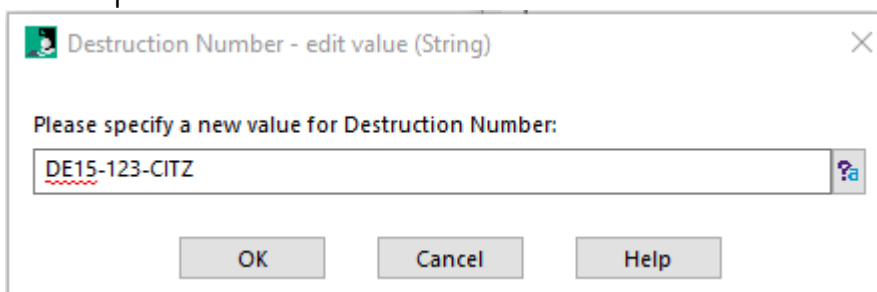
- Open user label | **Show Records** | **Tag All**
- **Right-click** anywhere in the list pane
- **Details** | **Additional Fields**



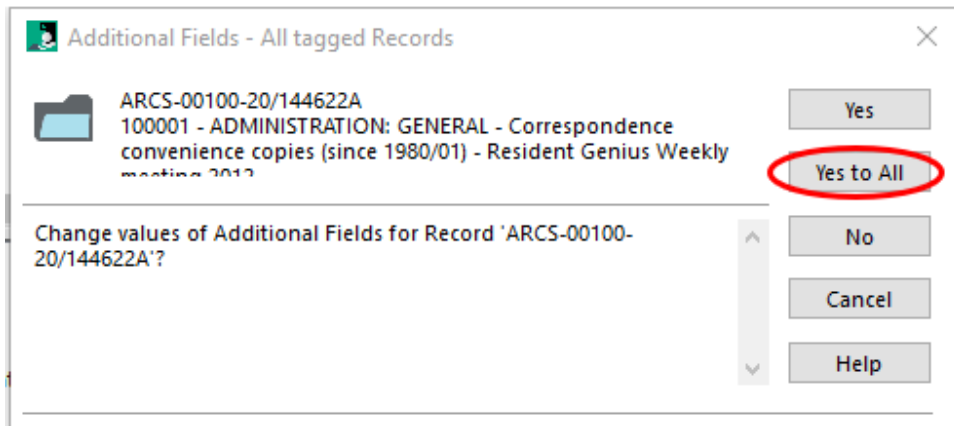
- **Additional Fields – All Tagged Records** window appears
- Select **Destruction Number | Modify**



- **Destruction Number – Edit Value** window appears
- Enter destruction number received from your Destruction Coordinator
| **OK**



- **OK again**
- **Yes To All**



- The Destruction Number has now been added to the folders
- Add **Destruction Number** column to list pane to verify destruction number was added to the folders

Record Type	Record Number	Title (Free Text Part)	Destruction Number
CITZ CIRMO GOVERNMENT RECORDS SERVICE P-FOLDER	ARCS-00100-20/144622A	Resident Genius Weekly meeting 2012	DE15-123-CITZ
CITZ CIRMO GOVERNMENT RECORDS SERVICE P-FOLDER	ARCS-00102-20/352322A	Cat Herding working group ad hoc meetings	DE15-123-CITZ
CITZ CIRMO GOVERNMENT RECORDS SERVICE P-FOLDER	ARCS-00925-20/4850822A	Cart before the Horse Agency FY 2012-13	DE15-123-CITZ
CITZ CIRMO GOVERNMENT RECORDS SERVICE P-FOLDER	ARCS-00220-20/548822A	Super Fun Happy Times Conference April 1, 2012	DE15-123-CITZ
CITZ CIRMO GOVERNMENT RECORDS SERVICE P-FOLDER	ARCS-00146-25/74622A	Interprovincial agreement for sharing trivial data	DE15-123-CITZ

9. CREATE ONSITE DESTRUCTION BOXES IN EDRMS CONTENT MANAGER

Each ministry has an onsite destruction box **record type**. Use this record type to create new EDRMS Content Manager destruction boxes.

9.1 Create new EDRMS Content Manager destruction box

- Home | New



- Double-click on [your ministry acronym] Box – Onsite Destructions/Storage

CITZ BOX ONSITE DESTRUCTIONS/STORAGE

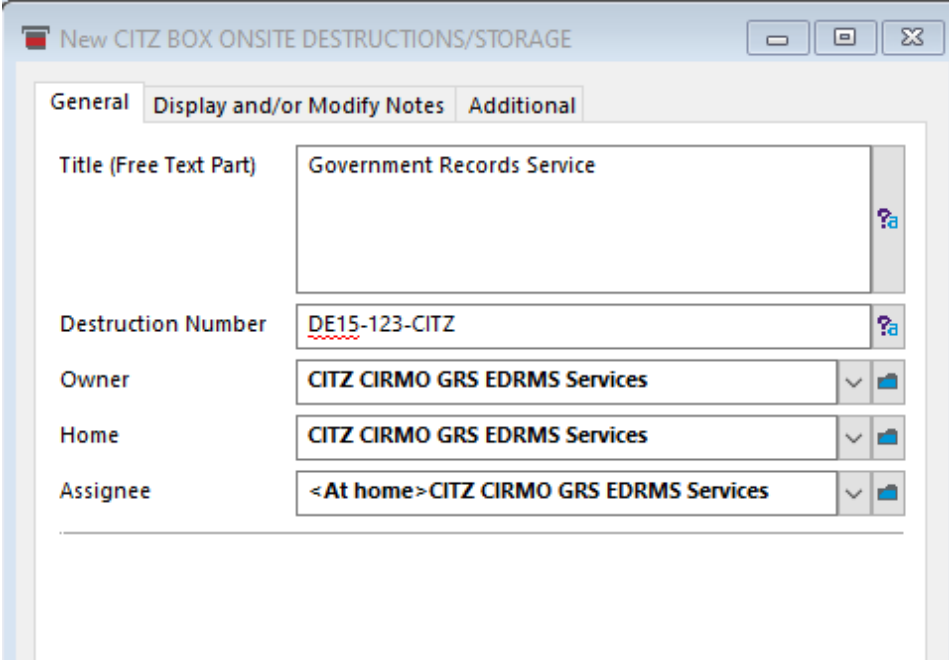
9.2 Enter box data

Add data in **New Record [ministry acronym] Box** window

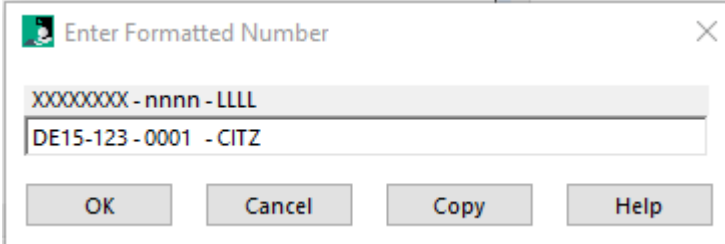
- **Title (Free Text Part)** = branch or program name

NOTE: do not identify the contents of the box. This is an information security standard as all EDRMS Content Manager users in your ministry can read any ministry box title.

- **Destruction Number** = IDA number you received from your ministry
- **Owner** = the new box will display your default Owner. If you manage EDRMS Content Manager for multiple owners, ensure the correct one is entered in this field
- **Home, Assignee** = default is usually the same as Owner
 - **NOTE:** see Appendix if Owner is set at Division and Assignee is set at Branch.
- **OK**



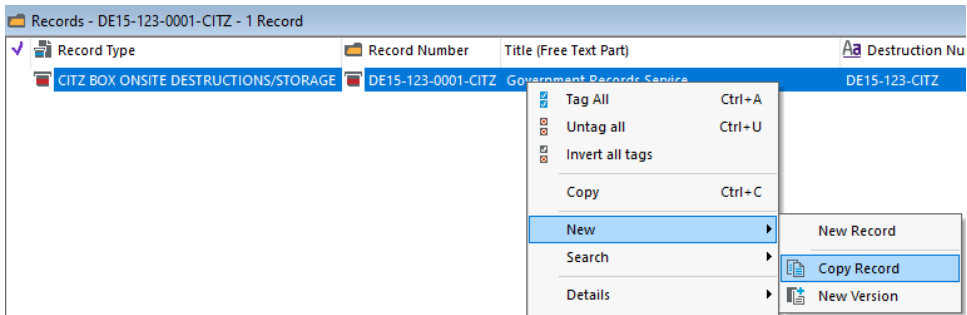
- **Enter Formatted Number** window appears



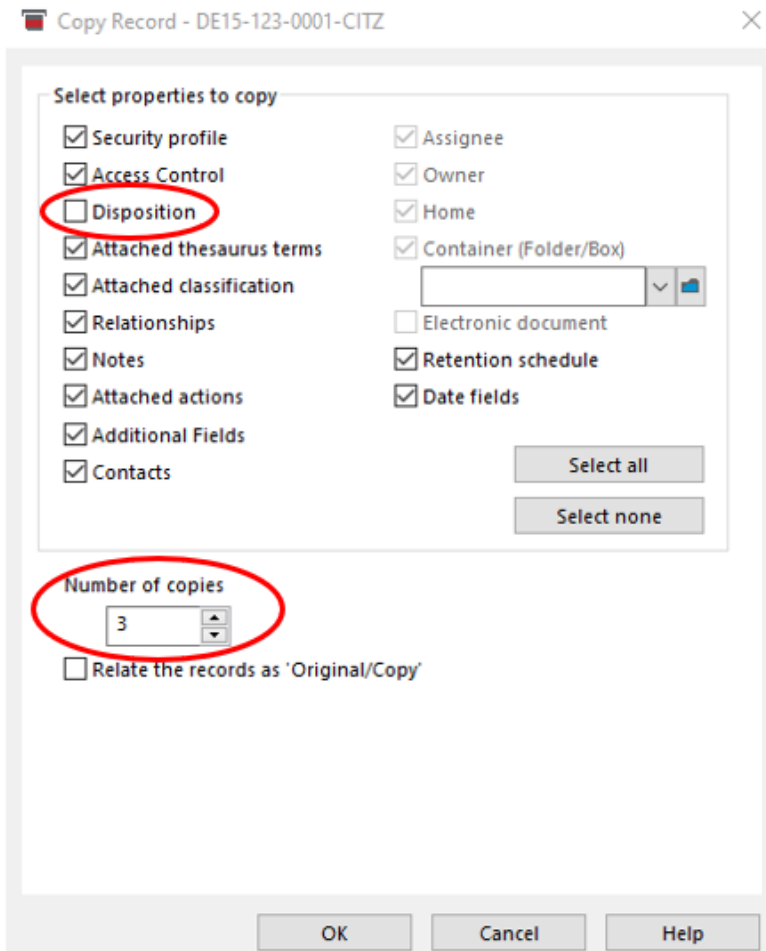
- Enter new Destruction Number and Box Number (usually 0001)
 - **NOTE:** EDRMS Content Manager prefills destruction numbers; please ensure that your Destruction Number is entered correctly.
- **OK**

9.3 Create additional destruction boxes

- Right-click on box 0001 | **New** | **Copy Record**



- **Copy Record** window appears
- Under "Select properties to copy" untick the Disposition box
- Enter number of boxes you need in **Number of copies**
- **OK**



- **Enter Formatted Number** window appears
- Update Destruction Number and Box Number | **OK** for each new box

- The example below shows four newly created destruction boxes

Record Type	Record Number	Title (Free Text Part)	Destruction Number	Dispositi...
CITZ BOX ONSITE DESTRUCTIONS/STORAGE	DE15-123-0001-CITZ	Government Records Service	DE15-123-CITZ	Semi-Active
CITZ BOX ONSITE DESTRUCTIONS/STORAGE	DE15-123-0002-CITZ	Government Records Service	DE15-123-CITZ	Semi-Active
CITZ BOX ONSITE DESTRUCTIONS/STORAGE	DE15-123-0003-CITZ	Government Records Service	DE15-123-CITZ	Semi-Active
CITZ BOX ONSITE DESTRUCTIONS/STORAGE	DE15-123-0004-CITZ	Government Records Service	DE15-123-CITZ	Semi-Active

10. ENCLOSE EDRMS CONTENT MANAGER FOLDERS IN DESTRUCTION BOX(ES)

Do not enclose physical-folders and electronic-folders in the same box **unless** they are alternatively contained electronic folders and physical folders.

This is what it looks like **at the physical-folder level**.

Record Type	Record Number	Title (Free Text Part)	Destruction Number	Dispositi...	Container (Folder/Box)	Alternative container (folder/box)
CITZ CIRMO GOVERNMENT RECORDS SERVICE P-FOLDER	ARCS-00925-20/4850822A	Cart before the Horse Agency FY 2012-13	DE15-123-CITZ	Semi-Active		ARCS-00925-20/4850922A

This is what it looks like **at the electronic-folder level** when you expand it by clicking on the + sign OR double click to see the contents. The disposition of the electronic folders needs to be Semi-Active before it can be added to the Destruction Box.

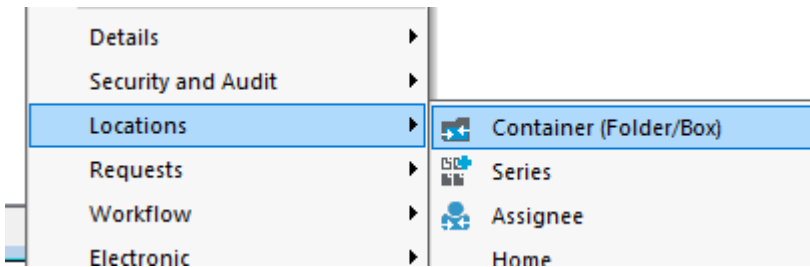
Record Type	Record Number	Title (Free Text Part)	Destruction Number	Dispositi...	Container (Folder/Box)	Alternative container (folder/box)
CITZ CIRMO GOVERNMENT RECORDS SERVICE E-FOL...	ARCS-00925-20/4850922A	Cart before the Horse Agency FY 2012-13		Active		
CITZ DOCUMENT	D322A	Drying oneself off before getting in the pool		Active	ARCS-00925-20/4850...	
CITZ CIRMO GOVERNMENT RECORDS SERVICE P-F...	ARCS-00925-20/4850822A	Cart before the Horse Agency FY 2012-13	DE15-123-CITZ	Semi-Active		ARCS-00925-20/4850922A

NOTE: see Appendix for enclosing linked physical folders and electronic folders in DE boxes.

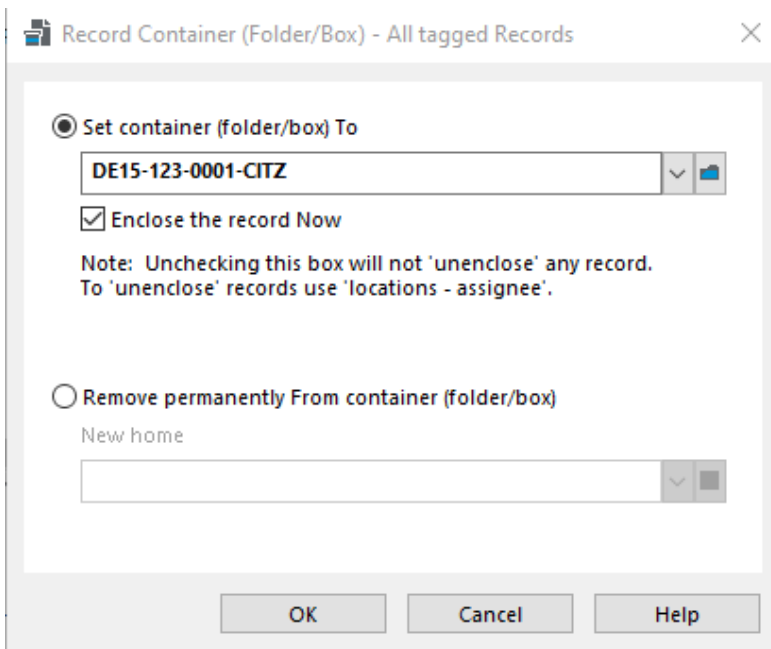
NOTE: An EDRMS Content Manager destruction box can contain approximately 300 folders.

10.1 Enclose Folders

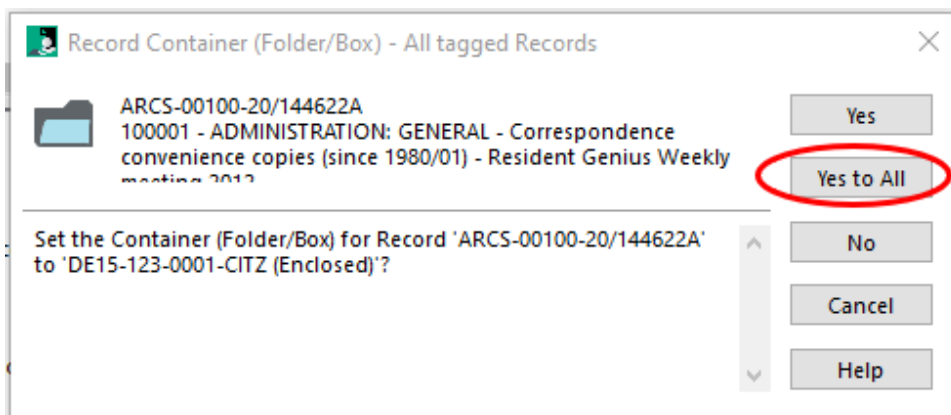
- **User Label** | right click | **Show records**
- **Tag** the folders to be enclosed in box 0001
- Right-click | **Locations** | **Container (Folder/Box)**



- **Records Container (Folder/Box)** window appears
- **Set Container (Folder/Box) To** = Destruction Box Number (DE). This is the "Record Number" that appeared when you created the EDRMS Content Manager box
 - If valid, the Destruction Box Number (DE) **will bold and underline**
 - Ensure **Enclose the Record Now** checkbox is selected
 - **OK**



- **Yes To All**



- The tagged folders are now enclosed in the EDRMS Content Manager DE box
- Folder view – the container (folder/box) column is populated showing the container in which the folder is located

Record Type	Record Number	Title (Free Text Part)	Destruction Number	Disposition	Container (Folder/Box)
CITZ CIRMO GOVERNMENT RECORDS SERVICE P-FOLDER	ARCS-00100-20/144622A	Resident Genius Weekly meeting 2012	DE15-123-CITZ	Semi-Active	DE15-123-0001-CITZ
CITZ CIRMO GOVERNMENT RECORDS SERVICE P-FOLDER	ARCS-00102-20/352322A	Cat Herding working group ad hoc meetings	DE15-123-CITZ	Semi-Active	DE15-123-0001-CITZ

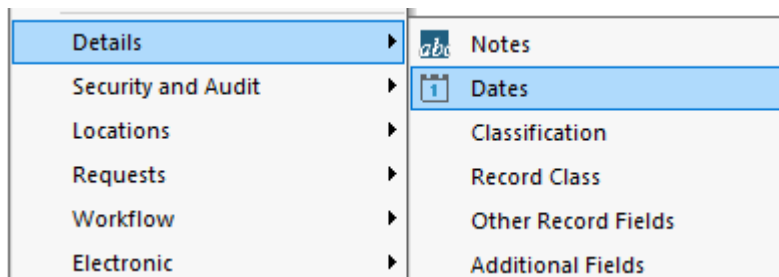
10.2 Continue to enclose folders in boxes

- Tag the next group of EDRMS Content Manager folders and enclose them in the next box.

11. CLOSE EDRMS CONTENT MANAGER DESTRUCTION BOXES

Closing Destruction Boxes in EDRMS Content Manager ensures the contents cannot be altered.

- **Tag All** of the Destruction Boxes | right click anywhere in list pane
- **Details | Dates**



- **Record Dates** window appears
- Select the **Date Closed** window | EDRMS Content Manager updates the fields with current date and time | **OK**
- The time stamp does not affect destruction process for the box so you may remove it or leave it in.

Record Dates - All tagged Records

<input type="checkbox"/> Date Created (Opened)			
<input type="checkbox"/> Date Registered			
<input checked="" type="checkbox"/> Date Closed	2022-01-11	11:20:16 AM	
<input type="checkbox"/> Date Due			
<input type="checkbox"/> Date Published			
<input type="checkbox"/> Last Action Date			

OK Cancel Help

- **Yes to All | OK**

NOTE: If you need to add a folder to a box that has been closed, send a request and EDRMS Content Manager reference to EDRMS.Help@gov.bc.ca requesting box or boxes be re-opened.

12. GOV DESTRUCTION LIST REPORT

12.1 How to use report

This report provides a fixed list of the folders destroyed onsite under a specific destruction number, including the boxes they were contained within. File the report in your ARCS-00432-30 folder.

12.2 Search for DE boxes

- **Search | Find Records**

- **Search tab:**

Search By = Record Number

Equal To = Destruction Number and asterisk (e.g., DE15-123*)

NOTE: asterisk * (wild card) ensures all boxes with DE number are found.

Search for Records

Search Filter Record Types Sort Results Options

Search By

Record Number

Choose operator and enter string value to search for

Matching de15-123*

More search options

A single string, possibly using wildcards or comparison operator, e.g. >=red, invo*

AND OR New Insert Delete (...) NOT Reset

number:de15-123*

OK Cancel Open Editor Help

- **OK** and a list of all DE boxes relating to DE number should appear

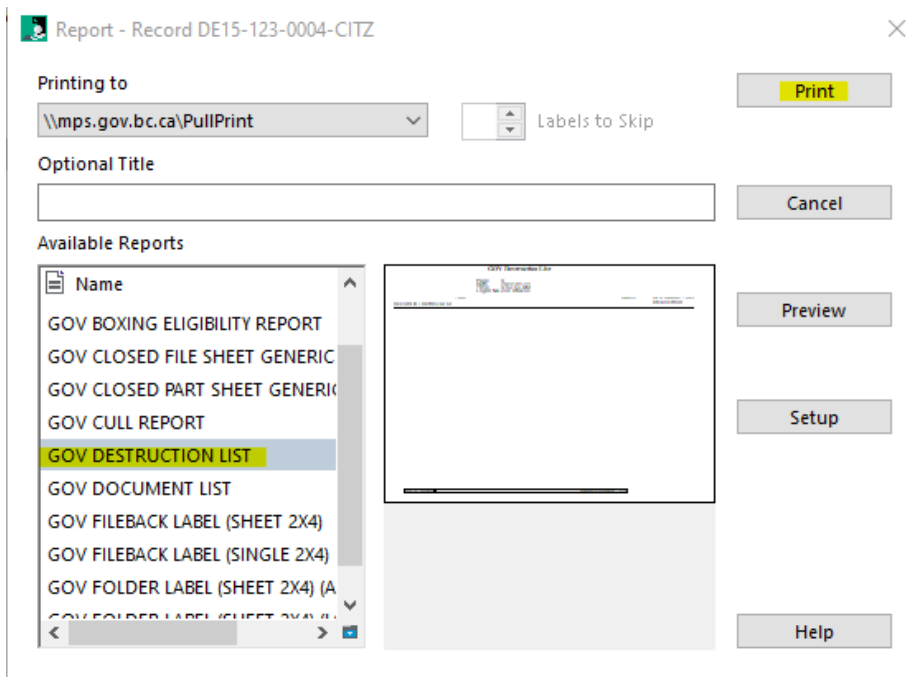
Record Type	Record Number	Title (Free Text Part)	Destruction Number	Dispositi...
CITZ BOX ONSITE DESTRUCTIONS/STORAGE	DE15-123-0001-CITZ	Government Records Service	DE15-123-CITZ	Semi-Active
CITZ BOX ONSITE DESTRUCTIONS/STORAGE	DE15-123-0002-CITZ	Government Records Service	DE15-123-CITZ	Semi-Active
CITZ BOX ONSITE DESTRUCTIONS/STORAGE	DE15-123-0003-CITZ	Government Records Service	DE15-123-CITZ	Semi-Active
CITZ BOX ONSITE DESTRUCTIONS/STORAGE	DE15-123-0004-CITZ	Government Records Service	DE15-123-CITZ	Semi-Active

12.3 Run the GOV DESTRUCTION LIST Report - this is done at the BOX Level not the folder level

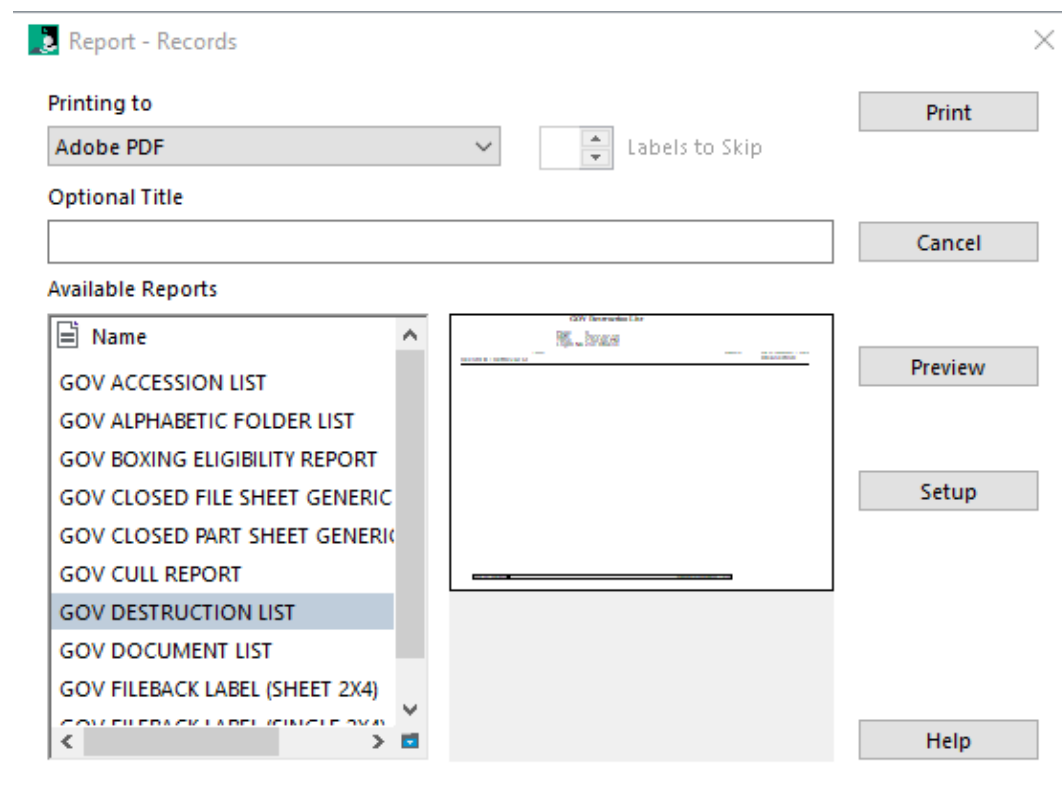
- **Tag All boxes** | right click | **Send to** | **Print Report**



- Select **GOV DESTRUCTION LIST** report
- Add Optional Title if desired after selecting report
- **Print**



NOTE: Printing to .pdf may be sufficient for your ministry's purposes.




13. SUBMIT ONSITE DESTRUCTION APPLICATION TO DESIGNATED APPROVER

13.1 Create an EDRMS Content Manager reference for DE boxes

- Find and List DE boxes relating to the DE number
- **Tag All** | right click in list pane

- **Send To | Save Reference**
- Select **Create a single EDRMS Content Manager Reference File**
- Title the reference with the DE Number | **OK**

13.2 Complete and return [ARS518](#) form to designated approver.

	INFORMATION DESTRUCTION AUTHORIZATION (IDA)	
	IDA #	
<p>Purpose: This form is used to document the onsite destruction of government information in accordance with an approved information schedule.</p> <p>Instructions: Offices requesting destruction must complete all sections before forwarding this form to their ministry-designated approver. Each Information Destruction Authorization (IDA) submitted should be accompanied by a standard file list; if not generated from EDRMS Content Manager, or a line of business system, use the File List Form (ARS661). If you are disposing of data that is not easily described using this list, contact your Ministry Records Officer for assistance.</p> <p>Requesting offices will arrange for the destruction of information in accordance with government-wide requirements for defensible information destruction.</p>		

13.3 Classify under ARCS-432-30

File a copy of the package, except for EDRMS Content Manager reference, under ARCS-432-30. This is your ministry's documentation that records were destroyed appropriately.

13.4 Receive approval to proceed with onsite destruction

- **Physical folders:**
 - On approval of your application, your Destruction Coordinator sends you a notice of approval to destroy.
 - Destroy or arrange for destruction of physical folders
 - Email confirmation of destruction to EDRMS.Help@gov.bc.ca. Include the date they were destroyed and the EDRMS Content Manager reference.
 - File a copy of your confirmation email in your ARCS-432-30.
 - GRS processes disposition; changes EDRMS Content Manager disposition status to "DE" for the boxes. DE status cascades to all folders within box(es)

- **Electronic folders:**

- GRS updates EDRMS Content Manager box status to "DE". DE status cascades to all electronic folders within the DE box(es).

NOTE: once an electronic folder has been processed for destruction (DE) the documents it held cannot be retrieved or recreated.

14. AFTER FOLDERS ARE PROCESSED FOR DESTRUCTION IN EDRMS Content Manager

Delete user labels

- **Shortcuts | Trays | User**

Labels

- Right click user label | **Delete**

This does NOT delete the Folders

APPENDIX: ONSITE DISPOSITION OF EDRMS CONTENT MANAGER FOLDERS

This appendix provides more detail about non-standard or infrequent issues; you may wish to review this appendix when planning your disposition project.

1. EDRMS Content Manager folder status: **semi-active** vs **active**

- The EDRMS Content Manager searches described in this procedure only work for electronic folders and physical folders that have a status of **semi-active**.
- EDRMS HELP updates folders from **active** to **semi-active** status for all EDRMS Content Manager users across government. This is a corporate service and is done weekly.
- To be updated, your EDRMS Content Manager folders must be:
 - **Closed** - The "Closed Date" field must have a date entered
 - **SO Date** -- The "SO Date" field must have a date entered if the folder has active base retention of **SO**
 - The scheduled active period has expired
- Physical folders that have the closed and SO dates (if applicable) completed will automatically update to Semi-Active when you move them into the box.
- Adding Active folders to Semi-Active boxes will change the folders' disposition to Semi-Active, but the Date due for Destruction must be met before disposition can proceed.
- Electronic folders that have documents need to be updated to Semi-Active prior to moving them to the box. Please contact EDRMS HELP to update folders for you if they are still showing as Active. To benefit from this service, ensure your EDRMS Content Manager folders are closed at the end of either the Fiscal Year (March 31) or the Calendar Year (December 31). This includes rolling over your FY and CY files each year and reviewing your SO files regularly.
- If you need to have folders updated from Active to Semi-Active immediately to process onsite destruction, provide EDRMS.Help@gov.bc.ca with an EDRMS Content Manager reference for the folders and request status update.

2. Obtain Information Destruction Authorization (IDA)

Your Destruction Coordinator provides Destruction Numbers to EDRMS Content Manager users managing onsite destruction. Your Destruction Coordinator can provide these numbers to ensure every DE number in EDRMS Content Manager is unique. A standard number format also supports efficient EDRMS Content Manager searches and reports.

3. Folders covered by draft schedules or have Holds applied

EDRMS Content Manager does not allow folders covered by draft (unapproved) schedules or folders that have a Hold applied to them to be processed for final disposition.

4. Narrow a search

In step 4.2 (Search tab) narrow the scope of the search to specific physical or electronic folders within a branch by adding criteria to the search tab query.

The following examples show common search criteria:

NOTE: Clicking NEW allows you to do a compound search on more than one selection

A range of classifications using Expanded Number search within a specific branch (e.g., ARCS buildings and facilities records)

Search for Records

Search Filter Record Types Sort Results Options

Search By

Expanded Number

Enter a string value for start and end of range

ARCS-00100-00

To

ARCS-00200-00

More search options

A range of string values, e.g. between 07/0123 and 07/0133

AND OR New Insert Delete (,) NOT Reset

owner:CITZ CIRMO GRS EDRMS Services

and number:ARCS-00100-00 to ARCS-00200-00

OK Cancel Open Editor Help

One classification (e.g., ARCS IT Project files)

The 'Search for Records' dialog box is shown with the 'Search' tab selected. The 'Search By' dropdown is set to 'Classification'. The 'Enter the Classification to search by' field contains 'ARCS-06450-20'. The 'Recursive' checkbox is unchecked. The 'Select search style for Classification' dropdown is set to 'An individual Classification'. The search criteria list shows a single entry: 'owner:CITZ CIRMO GRS EDRMS Services and classification:ARCS-06450-20'. The 'AND' radio button is selected in the logic section.

Search for Records

Search Filter Record Types Sort Results Options

Search By
Classification

Enter the Classification to search by
ARCS-06450-20

☐ Recursive

Select search style for Classification
An individual Classification

☒ AND ☐ OR New Insert Delete (...) NOT Reset

owner:CITZ CIRMO GRS EDRMS Services
and classification:ARCS-06450-20

OK Cancel Open Editor Help

Two classifications only (e.g., ARCS Training files)

The 'Search for Records' dialog box is shown with the 'Search' tab selected. The 'Search By' dropdown is set to 'Classification'. The 'Enter the Classification to search by' field contains 'ARCS-01735-30'. The 'Recursive' checkbox is unchecked. The 'Select search style for Classification' dropdown is set to 'An individual Classification'. The search criteria list shows two entries: 'owner:CITZ CIRMO GRS EDRMS Services and classification:ARCS-01735-20' and 'or classification:ARCS-01735-30'. The 'OR' radio button is selected in the logic section.

Search for Records

Search Filter Record Types Sort Results Options

Search By
Classification

Enter the Classification to search by
ARCS-01735-30

☐ Recursive

Select search style for Classification
An individual Classification

☐ AND ☒ OR New Insert Delete (...) NOT Reset

owner:CITZ CIRMO GRS EDRMS Services
and classification:ARCS-01735-20
or classification:ARCS-01735-30

OK Cancel Open Editor Help

To put search criteria in brackets, tag the two you want together --> Click OR button and then the Bracket button highlighted above

A screenshot of a search criteria editor window. At the top, there are radio buttons for **AND** and **OR**, with **OR** selected. To the right of these are buttons: **New**, **Insert**, **Delete**, **(...)** (highlighted), **NOT**, and **Reset**. Below these is a text area containing the search query: `owner:CITZ CIRMO GRS EDRMS Services`
`and (classification:ARCS-01735-20`
`or classification:ARCS-01735-30)`. At the bottom of the window are buttons: **OK**, **Cancel**, **Open**, **Editor** (with a dropdown arrow), and **Help**.

One classification (e.g., all folders relating to a type of ORCS case file)

A screenshot of the "Search for Records" dialog box. It has a title bar with a close button. Below the title bar are tabs: **Search**, **Filter**, **Record Types**, **Sort**, **Results**, and **Options**. The **Search** tab is active. Inside the tab, there is a "Search By" section with a dropdown menu set to **Classification**. Below this is a text input field labeled "Enter the Classification to search by" containing the text **REMS-11000-20**. There is a checkbox for **Recursive** which is unchecked. Below that is a section "Select search style for Classification" with a dropdown menu set to **An individual Classification**. At the bottom of the dialog, there are radio buttons for **AND** and **OR**, with **OR** selected. To the right of these are buttons: **New**, **Insert**, **Delete**, **(...)** (highlighted), **NOT**, and **Reset**. Below these is a text area containing the search query: `owner:CITZ CIRMO GRS EDRMS Services`
`and classification:REMS-11000-20`. At the bottom of the dialog are buttons: **OK**, **Cancel**, **Open**, **Editor** (with a dropdown arrow), and **Help**.

Records with the same Retrieval Code (e.g., all files relating to a particular project or entity which may have different classifications)

Search for Records

Search Filter Record Types Sort Results Options

Search By
Retrieval Code

Enter the words to use for this search
CIPR

owner:CITZ CIRMO GRS EDRMS Services
and RetrievalCode:CIPR

OK Cancel Open Editor Help

5. Missing physical folders

If you cannot locate a physical folder, update EDRMS Content Manager data to record the folder as missing. A missing folder cannot be added to a box.

- Right click on folder | **Locations** | **Assignee**
- Select **Set as Missing** button | Enter Effective From date if it differs from current date | **OK**

Set Assignee - ARCS-00146-25/74622A

☐ Set to location

Due for return by

☐ Set to home

DE15-123-0002-CITZ (in container (folder/box))

☐ Set to the earliest requester

Due for return by

☒ Set as 'Missing'

Effective from

2022-01-11 12:43:57 PM

OK Cancel Help

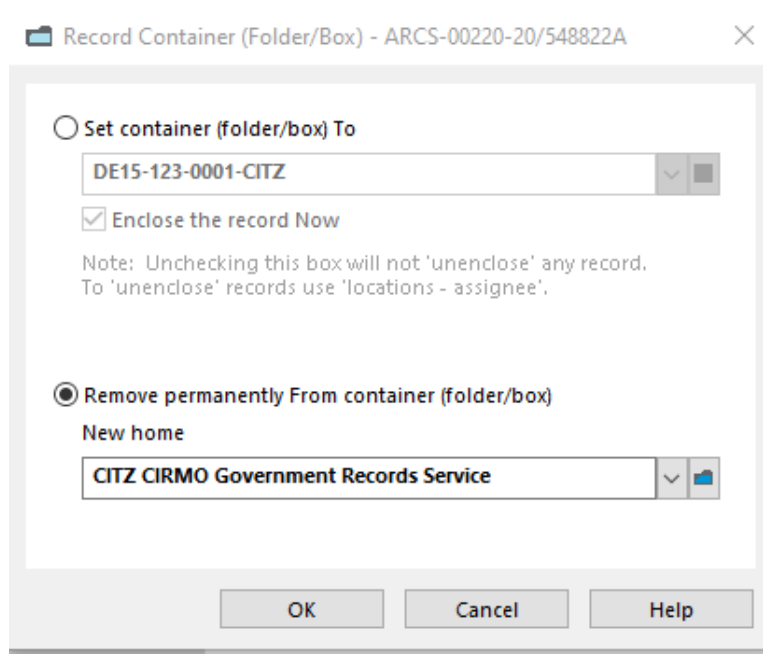
- Right click on folder (again) | **Details** | **Notes**
- Add details about missing folder in Notes tab to provide background as to steps taken to find the folder
- If the physical folder is located later, update EDRMS Content Manager data and process onsite disposal
- **NOTE:** if a missing physical folder is a part of a multi-part case file, you may destroy the rest of the folder parts after identifying the missing part(s) in EDRMS Content Manager and adding a note.

6. Remove Folder from Destruction Box and Destruction Number from folder(s)

If you remove a folder from the destruction action, you must update EDRMS Content Manager.

1. Remove the folder

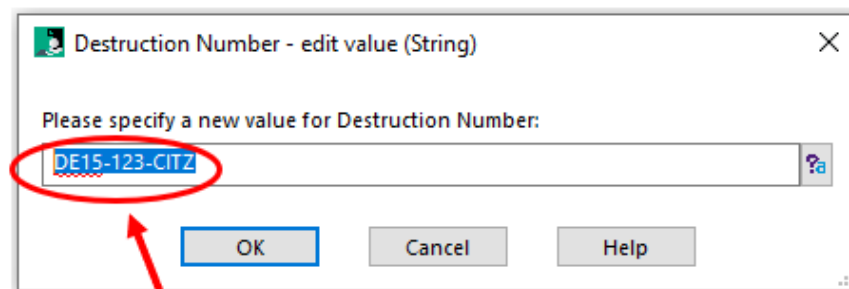
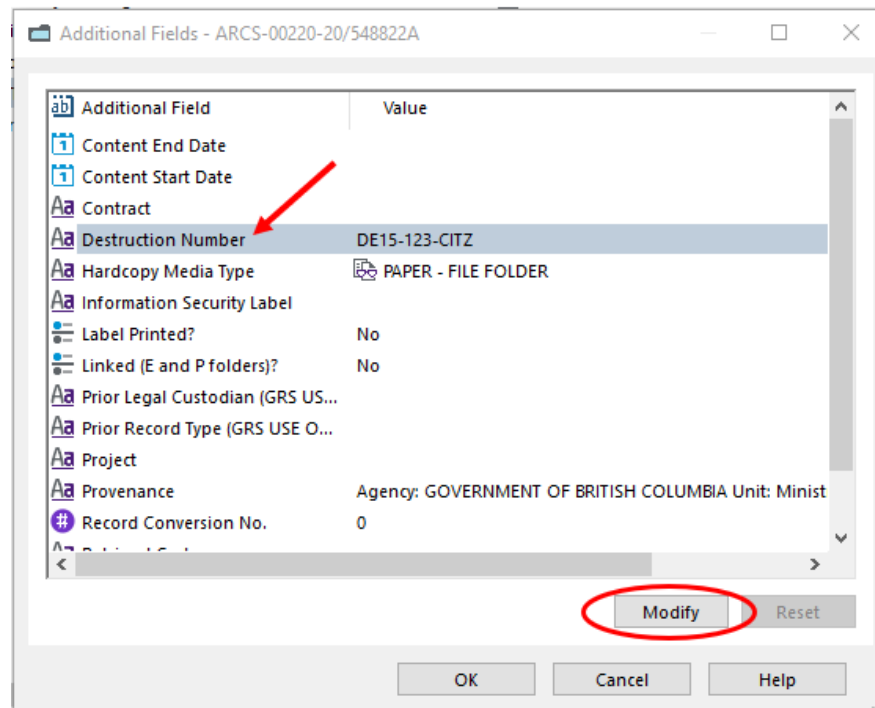
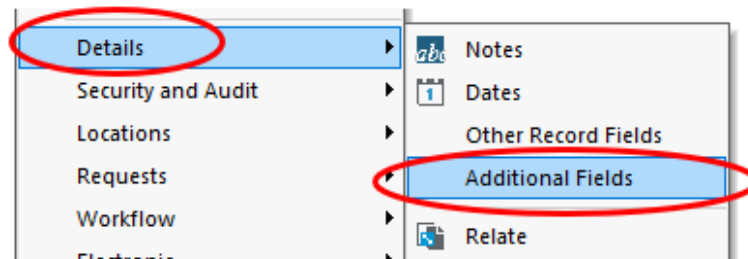
- Right click | **Locations** | **Container (folder/box)**
- On the pop up select **Remove permanently from container (folder/box)**
- Insert **New Home Location** Go to the yellow folder icon, and find your EDRMS Content Manager Owner location and select it
- **OK**



2. To remove the Destruction Number:

- **Tag** folder(s)
- Right click anywhere in List Pane | **Details** | **Additional Fields**
- **Additional Fields** window appears

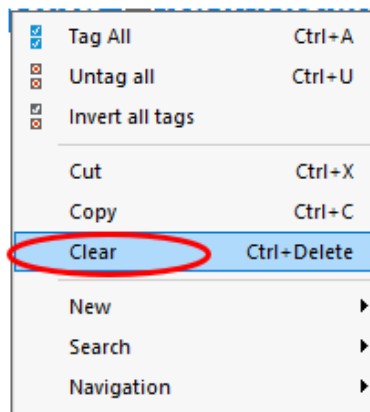
- **Destruction Number | Modify**
- In **Destruction Number – Edit Value (String)** window, remove DE number from the field | **OK**



Backspace or Delete this number to remove it

7. Remove folder(s) from User Label

- **Tag** folder(s) | Right click anywhere in list pane
- **Clear**



OK yes to all

8. Manage alternatively contained physical folders and electronic folders

If you have alternatively contained folders, where the EDRMS Content Manager physical-folder is alternatively contained “within” an electronic-folder, you must enclose the electronic folder in the same destruction box as the physical folder. This way, both folders will be documented as “destroyed onsite” in the same DE box

- Include both E-FOLDER and P-FOLDER record types in searches
- As they are the same file, ensure the classification, series record, open and closed dates and title are the same on both the electronic folder and the physical folder
- Add the “Alternative Container” column in the list pane, so the physical folders will be listed within their linked electronic folders
- When enclosing the linked folders in a DE box, tag **both** folders (electronic and physical-), and enclose them in the same DE box
- When GRS reviews box contents, it will be clear the DE box(es) hold linked folders, and both formats will be processed for destruction **after** you confirm the physical folders were destroyed.
- The Ministry must confirm physical destruction of the physical folders before GRS will process destruction in EDRMS Content Manager for both formats.

Record Type	Record Number	Title (Free Text Part)	Destruction Number	Dispositi...	Container (Folder/Box)	Alternative container (folder/box)
✓ CITZ CIRMO GOVERNMENT RECORDS SERVICE P-FOLDER	ARCS-00925-20/4850822A	Cart before the Horse Agency FY 2012-13	DE15-123-CITZ	Semi-Active		ARCS-00925-20/4850922A
✓ Record Type	Record Number	Title (Free Text Part)	Destruction Number	Dispositi...	Container (Folder/Box)	Alternative container (folder/box)
✓ CITZ CIRMO GOVERNMENT RECORDS SERVICE E-FOL...	ARCS-00925-20/4850922A	Cart before the Horse Agency FY 2012-13		Active		
✓ CITZ DOCUMENT	D322A	Drying oneself off before getting in the pool		Active	ARCS-00925-20/4850...	
✓ CITZ CIRMO GOVERNMENT RECORDS SERVICE P-F...	ARCS-00925-20/4850822A	Cart before the Horse Agency FY 2012-13	DE15-123-CITZ	Semi-Active		ARCS-00925-20/4850922A

9. Recommendations for printing reports

- **GOV BOXING ELIGIBILITY LIST report**

Run this report for physical folders only. The purpose of this report is to provide you with a hardcopy list of physical folders that you can refer to as you pull physical folders from their shelves for disposal. As you pull each physical folder, note on the report the Destruction Box Number in which you are placing the folder. When you are finished using the report, you can discard it as transitory.

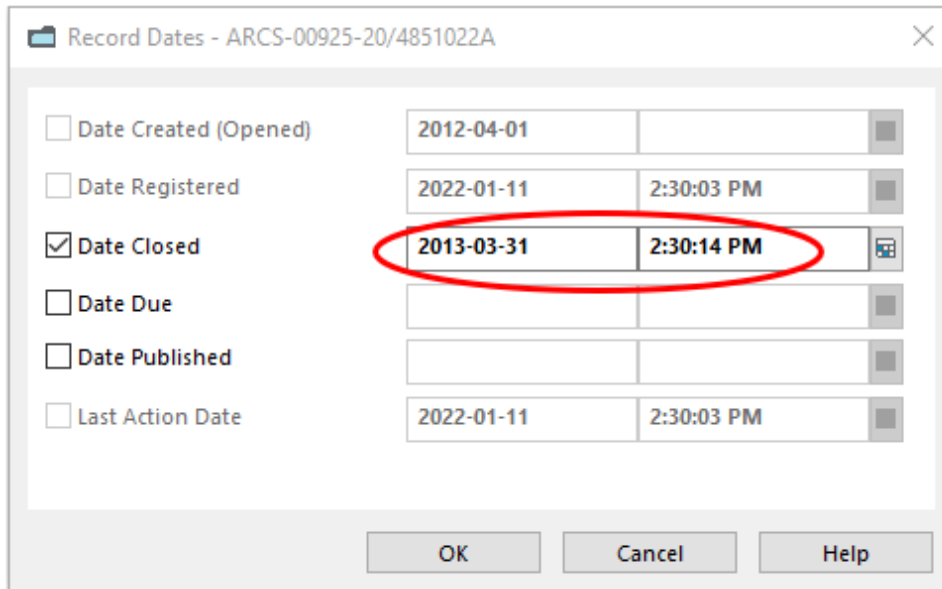
- **GOVERNMENT DESTRUCTION LIST report**

This report documents all the folders processed for onsite destruction (both electronic folders and physical folders) and the EDRMS Content Manager DE boxes in which they are enclosed. The report provides a permanent record of the destruction action. Please keep these for your ministry's records.

10. Closed folders and time stamps

When you close a physical folder that has an active base retention of Fiscal Year and the close date is March 31, you must delete the **time stamp** (see screen shot, below). The reason for this requirement is that EDRMS Content Manager adds an additional fiscal year to the active retention period if the time stamp field contains data.

Ensure that you backspace or delete the timestamp when you are closing the folder.



Record Dates - ARCS-00925-20/4851022A

<input type="checkbox"/> Date Created (Opened)	2012-04-01		
<input type="checkbox"/> Date Registered	2022-01-11	2:30:03 PM	
<input checked="" type="checkbox"/> Date Closed	2013-03-31	2:30:14 PM	
<input type="checkbox"/> Date Due			
<input type="checkbox"/> Date Published			
<input type="checkbox"/> Last Action Date	2022-01-11	2:30:03 PM	

OK Cancel Help

11. Folders with Parts

If you are managing onsite destruction of a EDRMS Content Manager folder that has multiple “parts”, remember that EDRMS Content Manager manages all the parts as a single file. This means that all parts are scheduled together, according to the closed date of the last part.

The last part of a file must be closed and eligible for immediate destruction before any of the parts can be destroyed.

Different parts of a folder can be located in different physical places (e.g., in different boxes). **Remember that all the parts of a file will reach their eligible final disposition date at the same time, based on the closed date of the last part for Fiscal Year and Calendar Year files, and the SO date for SO files.**

All parts of an SO file must have the same SO date.

You can only add the last part into the box and must email EDRMS.Help@gov.bc.ca a reference to the rest of the parts so that they can move the remainder into the box on your behalf.

If a part of a file is missing, you may continue with destruction of the other parts, just ensure you note it as “missing” in EDRMS Content Manager.

NOTE: If you have questions about whether you should create parts, contact your GRS Records Team, GRS@gov.bc.ca.