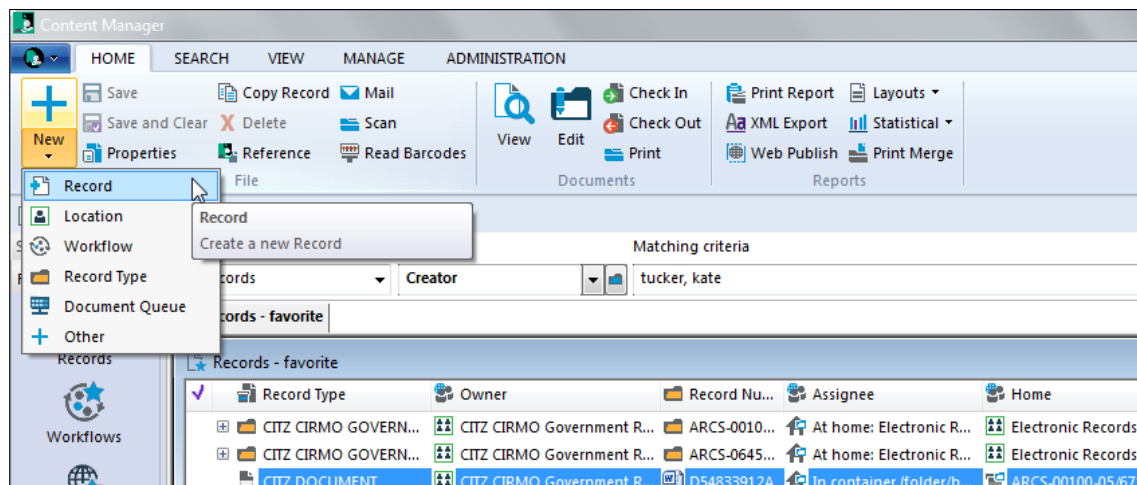


## Creating a Record

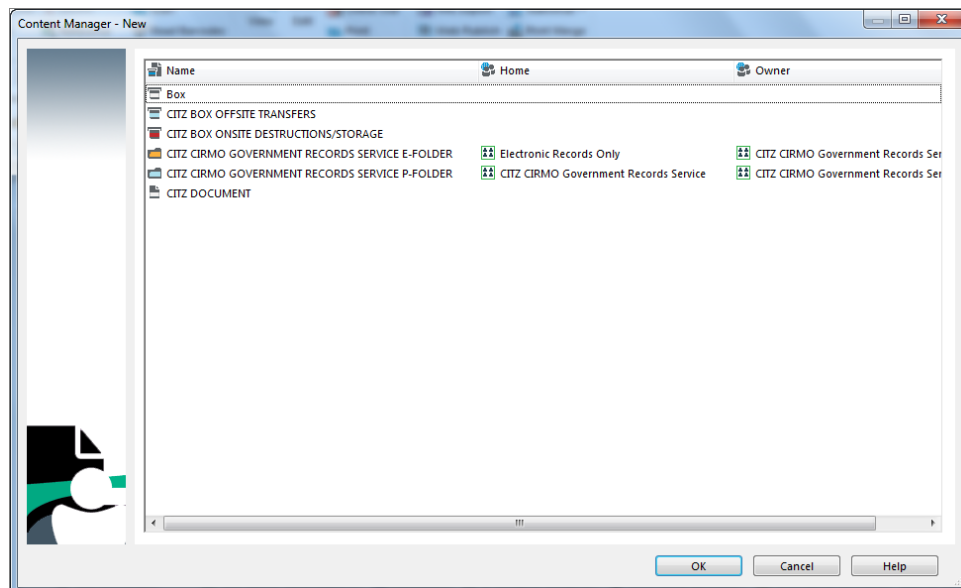
**NOTE:** A record in EDRMS Content Manager can be a document, a folder, or a box. A folder can be an E-FOLDER (electronic) or a P-FOLDER (paper).

To create a new record:

From the **Home** tab, select **New** and then **Record**.



A list of available **Record Types** will be displayed.



Select the type of record and click **OK**. The **New Record** popup is displayed. The fields in the popup will vary, depending on the type of record you want to create.

## EDRMS CONTENT MANAGER TIP 005

### Physical Folder (P-Folder) and Electronic Folder (E-Folder)

These are created the same except E-folder assignee is usually “**Electronic Records Only**” and **Hardcopy media type** is not an option.

The screenshot shows a dialog box for creating a new record. It has tabs for 'General', 'Security / Access', and 'Related Records'. The 'General' tab is active, showing fields for Classification, Title (Structured Part), Title (Free Text Part), Series record, Retention schedule, Alternative container (folder/box), Retrieval Code, Date Created (Opened), Date Closed, SO Date, Home, Assignee, and Hardcopy Media Type. Red arrows point from text boxes to specific fields in the dialog.

Type in the **Classification** you need in the format: **XXXX-NNNNN-NN**  
E.G. ARCS-00100-20.  
If you have used it before it will appear in the dropdown menu to select OR click the blue Kwikselect folder to search for one.

Enter the **Title (Free Text Part)** for your record using your file naming conventions. \* (see page 3)

The most commonly used **Series Record** codes are either **OPR** (Office of primary responsibility) **NON-OPR** (Not the Office of primary responsibility) OR **EXE** (Executive schedule). You must type these in once and then they will appear in the drop-down menu for future file creations.

**Alternative container** is for a hybrid record, enter the Electronic Folder Record number the Physical folder is contained within here.

**Retrieval Code** is a word, name or ministry specific file number that can be used as a quick way to search for records that is not part of the **Title (Free Text Part)**.

**Date Created (Opened)** pre-fills automatically with today's date. If you are creating old files, then update it to the date the file was opened and remove the time stamp.

**Home & Assignee** pre-fill based on the record type you are creating.

**Hardcopy Media Type** is the type of media this record represents. To change this, delete the text then click the blue Kwikselect folder to see all options to choose from.

Click **OK**. The new record is displayed in the **List Pane**. EDRMS Content Manager automatically generates a **Record Number**.

## EDRMS CONTENT MANAGER TIP 005

### Creating Boxes

**Offsite Boxes:** created to add folders into for off-siting accessions.

The screenshot shows the 'New CITZ BOX OFFSITE TRANSFERS' dialog box with the following fields and callouts:

- Title (Free Text Part):** Contains 'EDRMS Services'. Callout: Enter the **Title (Free Text Part)** for your box which should be your **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 box title.
- Accession Number:** Contains '991234'. Callout: **Accession number** is received from GRS and is a 6-digit number (e.g. 99-1234) entered with no spaces or dashes.
- Consignment (Application):** Contains '102477'. Callout: **Consignment (Application)** is the 6-digit application number received from GRS.
- Owner:** Dropdown menu showing 'CITZ OCIO CIRMO Government Records'. Callout: **Owner** name (i.e. the current legal custodian of the records) It may be a Divisional name and differ from your branch name.
- Home:** Dropdown menu showing 'CITZ OCIO CIRMO GRS EDRMS Services'. Callout: **Home** is the current location of the box. GRS will update this field with offsite facility name when they confirm receipt of the box.
- Assignee:** Dropdown menu showing '<At home> CITZ OCIO CIRMO GRS EDRM'. Callout: **Assignee** defaults to Home.

Buttons at the bottom: OK, Cancel, Help.

Click **OK** when complete.

**Enter Formatted Number window** appears. Enter 6-digit Accession number and 4-digit box number. First box number is = 0001 except for OANs (Ongoing Accession Numbers).

**NOTE: EDRMS Content Manager autofill may try to enter previous accession number used by anyone in the system into the field. Ensure you enter correct Accession number.**

The screenshot shows the 'Enter Formatted Number' dialog box with the following details:

- Field: nnnnnn - nnnn
- Input: 991234 - 0001
- Buttons: OK, Cancel, Copy, Help.

Click **OK**. The new box is displayed in the **List Pane**.

## EDRMS CONTENT MANAGER TIP 005

**Destruction Boxes:** created to add folders into for onsite destructions or for box storage where files are stored in a file room.

The screenshot shows a dialog box titled "New CITZ BOX ONSITE DESTRUCTIONS/STORAGE" with three tabs: "General", "Display and/or Modify Notes", and "Additional". The "General" tab is active, showing the following fields:

- Title (Free Text Part):** A text box containing "ARCS DE".
- Destruction Number:** A dropdown menu showing "DE25-012".
- Owner:** A dropdown menu showing "CITZ OCIO CIRMO GRS EDRMS Services".
- Home:** A dropdown menu showing "CITZ OCIO CIRMO GRS EDRMS Services".
- Assignee:** A dropdown menu showing "<At home> CITZ OCIO CIRMO GRS EDRMS Ser".

At the bottom are buttons for "OK", "Cancel", and "Help".

Callout boxes provide additional information:

- Title (Free Text Part):** Enter the **Title (Free Text Part)** for your box which should be your **branch** or **program name** or something generic for onsite storage boxes. **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 box title.
- Destruction Number:** **Destruction Number** is the Information Destruction Authorization number (IDA)
- Owner:** **Owner** name (i.e. the current legal custodian of the records) It may be a Divisional name and differ from your branch name.
- Home:** **Home** is the current location of the box. GRS will update this field with offsite facility name when they confirm receipt of the box.
- Assignee:** **Assignee** defaults to Home

Click **OK**.

**Enter Formatted Number** window appears. Enter the Destruction number (IDA number which can't be more than 8 letters/numbers) and Box Number.

The Ministry acronym is automatic and **cannot** be changed.

**NOTE: EDRMS Content Manager autofill may try to enter previous destruction number used by anyone in the system into the field. Ensure you enter correct Destruction number.**

The screenshot shows a dialog box titled "Enter Formatted Number" with a close button (X) in the top right corner. It contains two text input fields:

- The first field shows a placeholder "XXXXXXXX - nnnn - LLLL".
- The second field contains the text "DE25-025 - 0001 - CITZ".

At the bottom are buttons for "OK", "Cancel", "Copy", and "Help".

Click **OK**. The new box is displayed in the **List Pane**.

### Electronic Documents

Electronic documents can only be created if your ministry has an electronic folder Record type.

They are created by filing an existing document from your LAN/Desktop (see [TIP 017 Moving Documents from LAN Folders to EDRMS Content Manager and Document Queues](#)) OR Outlook email (see [TIP 006 Creating a Check In Style for Filing Emails](#)) to EDRMS Content Manager.

### Free Text Title Naming Guidelines for Folders and Documents

Entering a clear title with sufficient information into the **Free Text Title** field helps to ensure that searches can retrieve all relevant records. Use these guidelines when creating new records or cataloguing documents.

- Create unique, concise, meaningful titles that will aid in retrieval. Include document version # and date if relevant. Follow your branch/ministry document naming and formatting conventions.
- Enter titles in sentence case (capitalize first word in the sentence and any proper nouns).
- Avoid punctuation. *Exception:* apostrophes in names (e.g. O'Brien).
- Use abbreviations and acronyms in addition to the full name. *Exception:* acronyms that are always used (e.g. IBM). If the full name is lengthy, add it to the notes field.
- Use a space between the text and text separators such as a hyphen (-) or a slash (/). This will allow users to search on the individual text without using a wild card (\*) (e.g. Drawing / Work Package). *Exception:* hyphenated names (e.g. Conway-Brown).
- Use a space to separate initials in names (e.g. C. G. Conway-Brown).
- Enter numbers as digits unless spelled out as words in names.
- Enter years in the "YYYY" format; enter fiscal years or a range of years using "space hyphen space" between the years (i.e. 2004 - 2005).
- Avoid including personal/sensitive information.
- When creating folders, prevent duplication by first searching EDRMS Content Manager to ensure that the folder title you want to use does not already exist.
- Free text titles can be modified even after the record entry form has been saved. Information entered in the **Title (Free Text Part)** field does not change the original document/email title.
- For emails saved to the LAN that are moved into EDRMS CM the **Title (Free Text Part)** is pulled automatically from the email subject line. Changing the name of

## EDRMS CONTENT MANAGER TIP 005

the email saved on the LAN **will not** display when filed. Update the email subject prior to saving to LAN to work around this.

