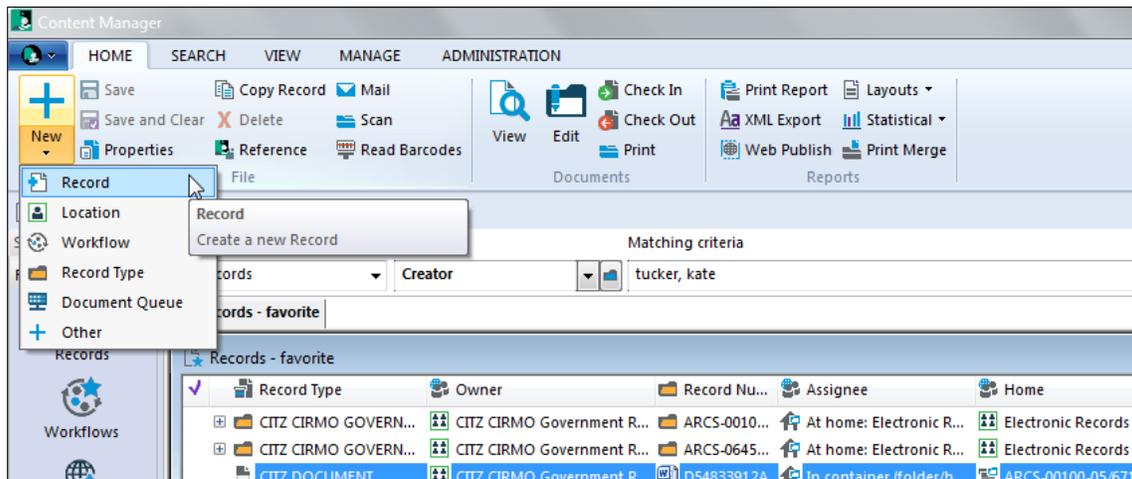


Creating a Record

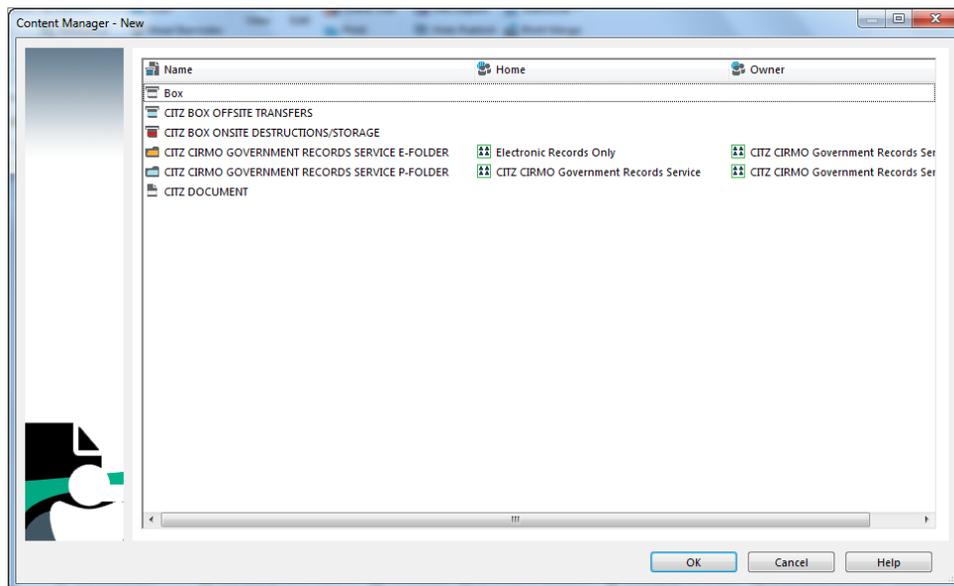
NOTE: A record in EDRMS Content Manager can be a document, a folder, or a box. A folder can be an E-FOLDER (electronic) or a P-FOLDER (paper).

To create a new record:

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



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

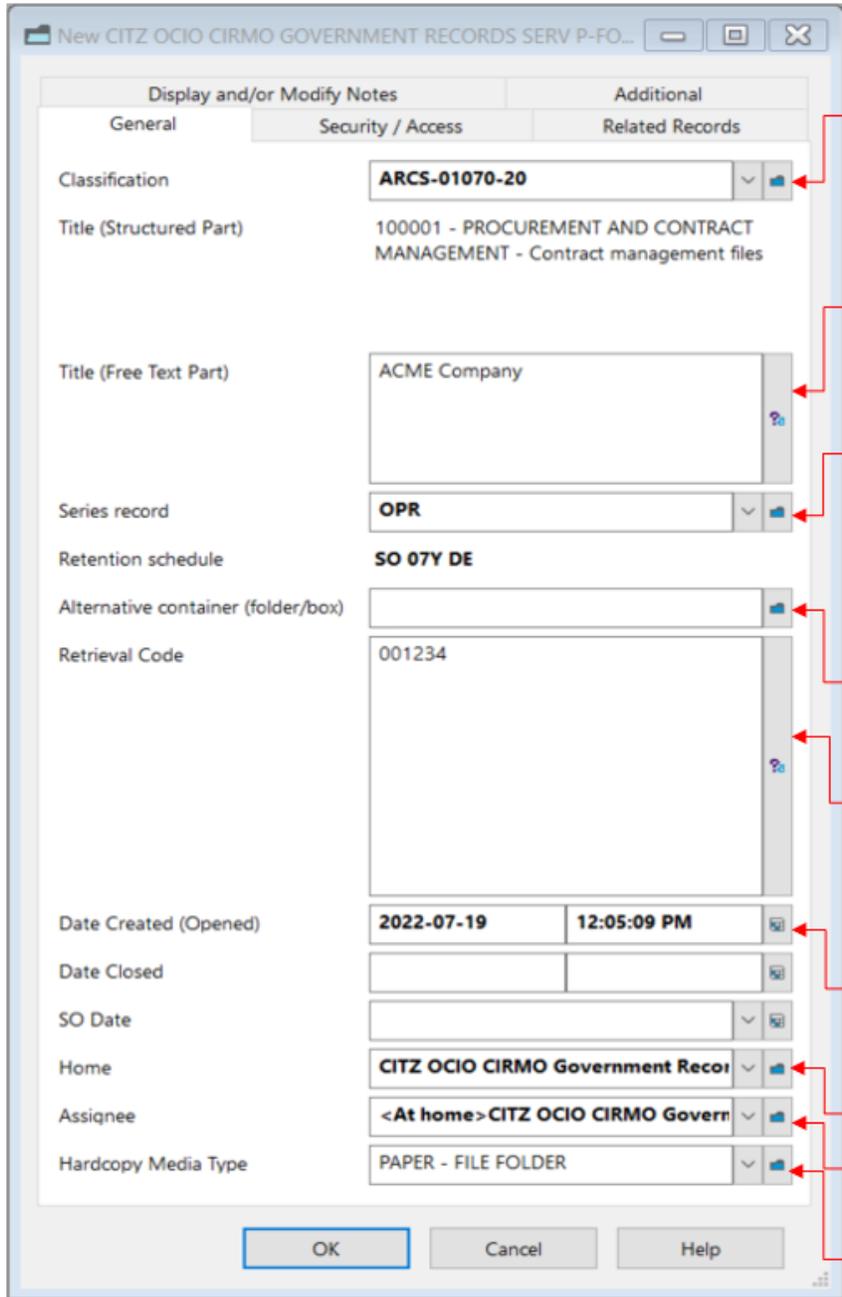


Select the type of record and click **OK**. The **New Record** popup is displayed. The fields in the popup will vary, depending on the type of record you want to create.

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 the 'New Record' dialog box in EDRMS Content Manager. The dialog is titled 'New CITZ OCIO CIRMO GOVERNMENT RECORDS SERV P-FO...'. It has three tabs: 'General', 'Security / Access', and 'Additional Related Records'. The 'General' tab is active. Fields include: Classification (ARCS-01070-20), Title (Structured Part) (100001 - PROCUREMENT AND CONTRACT MANAGEMENT - Contract management files), Title (Free Text Part) (ACME Company), Series record (OPR), Retention schedule (SO 07Y DE), Alternative container (folder/box) (empty), Retrieval Code (001234), Date Created (Opened) (2022-07-19 12:05:09 PM), Date Closed (empty), SO Date (empty), Home (CITZ OCIO CIRMO Government Recor), Assignee (<At home> CITZ OCIO CIRMO Govern), and Hardcopy Media Type (PAPER - FILE FOLDER). Callout boxes provide instructions for each field.

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.

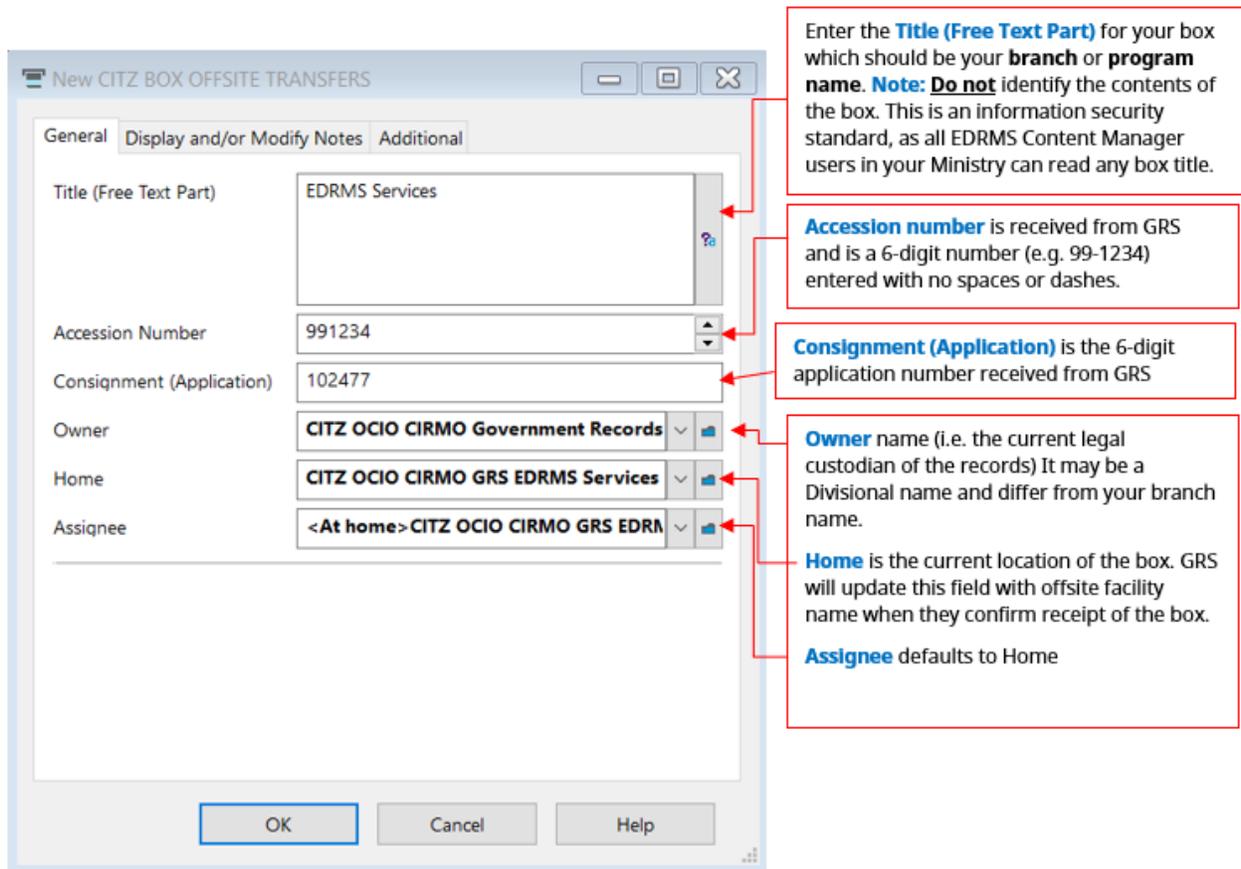
Hardcopy Media Type is the type of media this record represents. To change this, delete the text then click the blue Kwikselect folder to see all options to choose from.

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 a dialog box titled "New CITZ BOX OFFSITE TRANSFERS" with three tabs: "General", "Display and/or Modify Notes", and "Additional". The "General" tab is active and contains the following fields:

- Title (Free Text Part):** A text box containing "EDRMS Services".
- Accession Number:** A text box containing "991234".
- Consignment (Application):** A text box containing "102477".
- Owner:** A dropdown menu with "CITZ OCIO CIRMO Government Records" selected.
- Home:** A dropdown menu with "CITZ OCIO CIRMO GRS EDRMS Services" selected.
- Assignee:** A dropdown menu with "<At home> CITZ OCIO CIRMO GRS EDRM" selected.

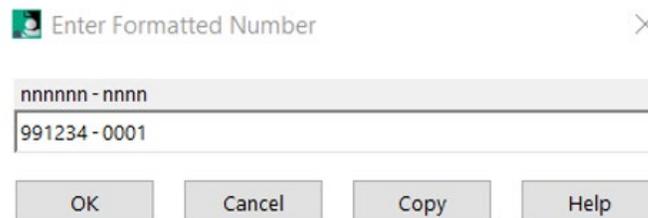
At the bottom of the dialog are "OK", "Cancel", and "Help" buttons. To the right of the dialog, five red-bordered callout boxes provide instructions:

- Callout 1:** "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." (Points to the Title field)
- Callout 2:** "**Accession number** is received from GRS and is a 6-digit number (e.g. 99-1234) entered with no spaces or dashes." (Points to the Accession Number field)
- Callout 3:** "**Consignment (Application)** is the 6-digit application number received from GRS" (Points to the Consignment field)
- Callout 4:** "**Owner** name (i.e. the current legal custodian of the records) It may be a Divisional name and differ from your branch name." (Points to the Owner dropdown)
- Callout 5:** "**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** defaults to Home" (Points to the Home and Assignee dropdowns)

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.

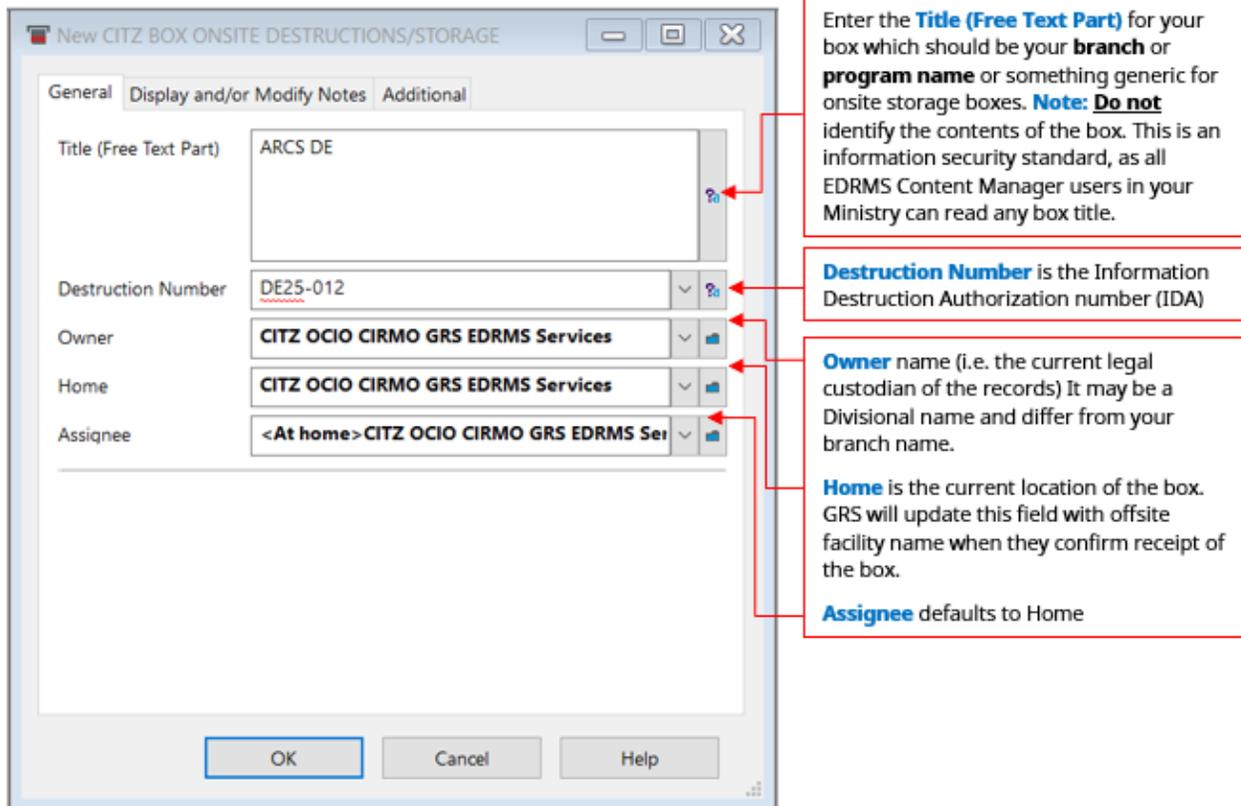


The screenshot shows a dialog box titled "Enter Formatted Number" with a close button (X) in the top right corner. It contains a text input field with a placeholder "nnnnnn - nnnn" and the value "991234 - 0001" entered. Below the input field are four buttons: "OK", "Cancel", "Copy", and "Help".

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 and contains 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 of the dialog are "OK", "Cancel", and "Help" buttons. Red callout boxes provide the following information:

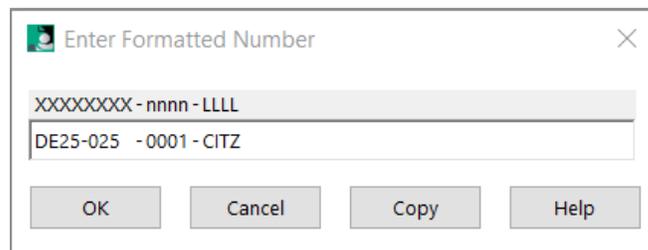
- Title (Free Text Part):** Enter the **Title (Free Text Part)** for your box which should be your **branch** or **program name** or something generic for onsite storage boxes. **Note: Do not** identify the contents of the box. This is an information security standard, as all EDRMS Content Manager users 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 "Enter Formatted Number" dialog box has a title bar with a close button. It contains two text input fields:

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

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

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.

