Tip 036: Creating a New Record Part

Primary Audience: All Users

Purpose: When a record such as a folder becomes too full it is necessary to create a new part to it so that you can 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 a record.

Parts can be created for p-folders (physical folders) when there are more documents than can fit into one physical folder. Parts should be created for e-folders (electronic-folders) when there are more than 300 documents per e-folder.

To create a new part for a record (you can only do this with folders):
1. Locate the folder for which you want to make a new part.
2. Right click on it, select **New** and then **New Part**.
3. The **Create New Part** popup is displayed. Choose how you want to locate the new part:

- **Locate new part with previous part**: puts the new part in the same location as the previous part.
- **Move new part to new location**: moves the new part to a different location to that of the previous part.
- **Move new part and previous part to new location**: moves both the new and previous parts to a different location.
- **New part location**: when you select either **Move new part to new location** or **Move new part and previous part to new location**, the **Locations** popup allows you to select from your list of locations or **Search for Locations**.
- **Copy notes**: check this box if you want to copy the notes from the original record/part to the new part.

4. Click **OK**.

EDRMS Content Manager will automatically close the previous part by adding a **Date Closed**, which will prevent further records from being added.