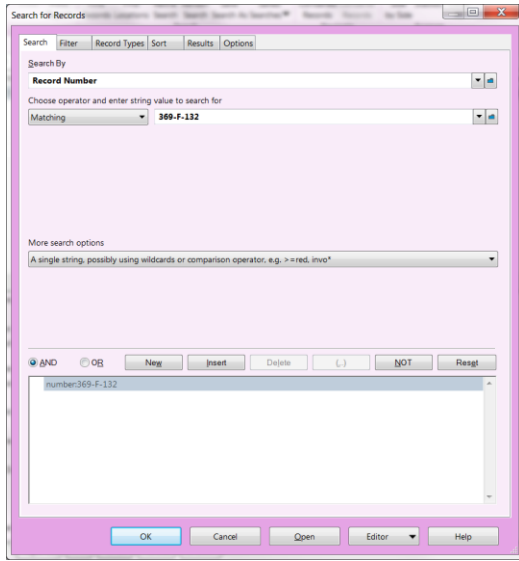


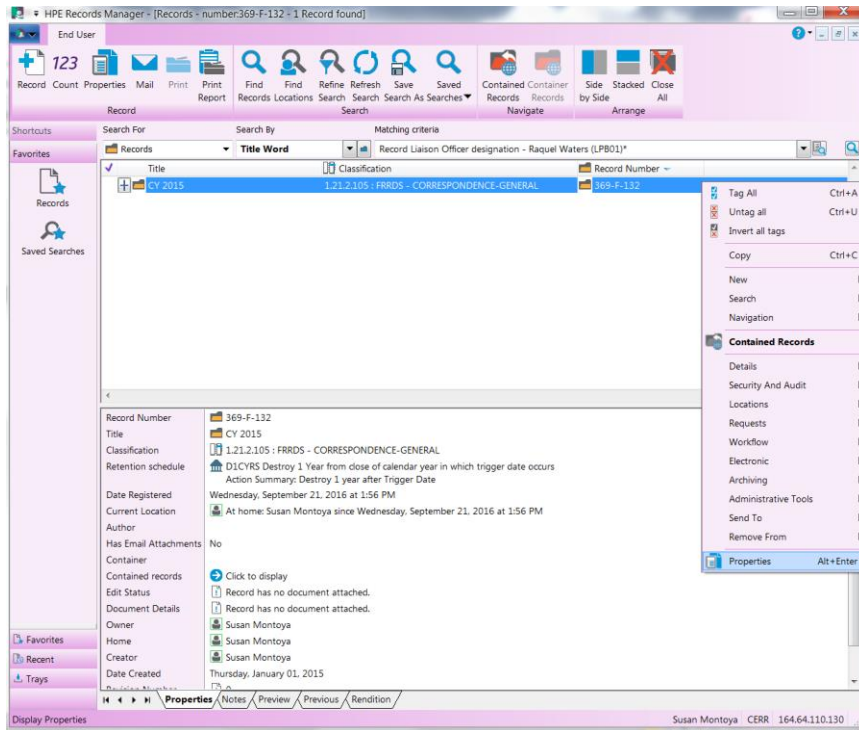
# Closing a file in HPE RM

## File Closure

In order for retention to be applied to folders within the CERR, the file must be closed. Prior to closing a folder in HPE RM, ensure that all content which may be contributed to the folder is already contained within it and that the trigger event for the folder has occurred. (If you are uncertain about what the trigger event is for your folder, please contact an agency analysis bureau analyst.) To close a file in HPE RM, begin by locating the file you wish to close. Files can most easily be located by searching by record number, title, classification, or owner. (For assistance with searching, please contact the CERR helpdesk at [CPR.RMD@state.nm.us](mailto:CPR.RMD@state.nm.us).)

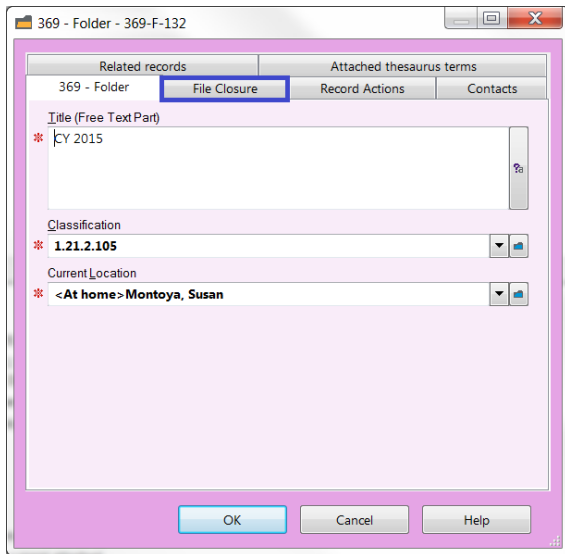


Once you have located the file you wish to close, right click, and select properties from the menu.

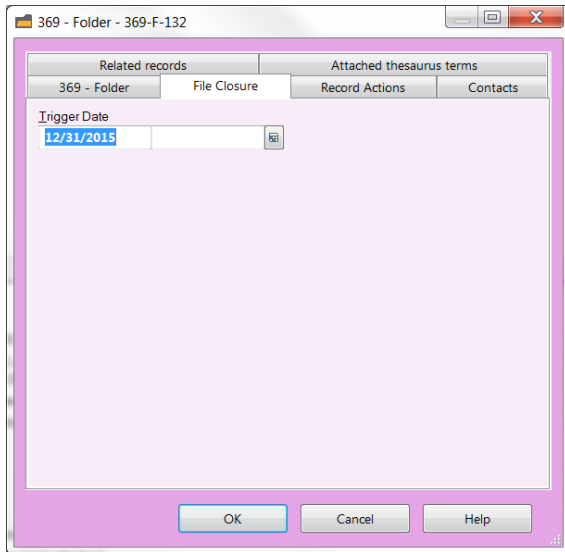


## Closing a file in HPE RM

In the properties window, click on the “file closure” tab.



Enter the trigger date for the folder in the trigger date field. For example, a folder classified as general correspondence from 2015 would have a trigger date of 12/31/2015. (If you are uncertain about what the trigger event is for your folder, please contact an agency analysis bureau analyst.)



Once the date is entered, click ok.