

Checking Locations and Managing User Access

Information Workers in EDRMS with the responsibility of managing users should review the User Access for those in their organizational unit on a regular basis, to ensure that they have the appropriate access, and that those no longer with the organization are deactivated.

Searching for an Individual User Location:

1. Using the **Quick Search bar**, choose Search for **Locations**, Search by **Display Name**, and input the "First name Last Name" of the individual you are searching for under the matching criteria field.

The screenshot shows a search interface with the following fields: 'Search for' (Locations), 'Search by' (Display Name), and 'Matching criteria' (Gale, Dorothy). Below the search bar, a list of results is displayed under the heading 'Locations - name:Gale,Dorothy - 9 Locations'. The results are shown in a table format with columns: Name, User Type, Network Login, Active?, Active From, and Active To.

Name	User Type	Network Login	Active?	Active From	Active To
gale	No login access - Inquiry User		Active	2013-09-16	
Gale, Dorothy	Login deactivated - Administrator	DORGALE	Active	2005-02-10	
Gale, Dorothy (Ms)	No login access - Records Co-ordinator		Not Active	2009-11-25	2013-07-11
Gale, Dorothy Ann	End User	DORAGALE	Active	2023-02-09	

Note: If the individual has an EDRMS CM Profile it will appear with a green square around a single person image. If you see one with a purple question mark, that means that the email address is a contact in an email that has been filed into the system, but they do not have an actual active profile.

2. In the **List pane**, displayed in the image above, the **User Type** column provides useful information that indicates what type of user they are in the system (i.e. **Inquiry User**, **End User** or **Information Worker**) and if they have **No login Access**.

These columns are customizable so right click on a column header and choose **Format columns** to add the ones you need.

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3. In the **View Pane** you can add **All Memberships** which will provide all the organizations a user has access to. To add or remove fields to the **View pane**, right click in it and select **Customize**.

Name	 Gale, Dorothy Ann
Network Login	DORAGALE
All Memberships	CITZ OCIO CIRMO Government Records Service
User Type	 End User
Notes	"February 9, 2023 at 11:04:58 AM (GMT+08:00) Drakos, Zoe:" Created as a test
Email Address	 dorothy.gale@gov.bc.ca

Searching for an Organization Location:

1. If you are looking for an organization and which users have access to it, then you can do a search by the organization name.
2. If you are uncertain of the location name, search by the ministry name first which contains all the locations of a ministry.

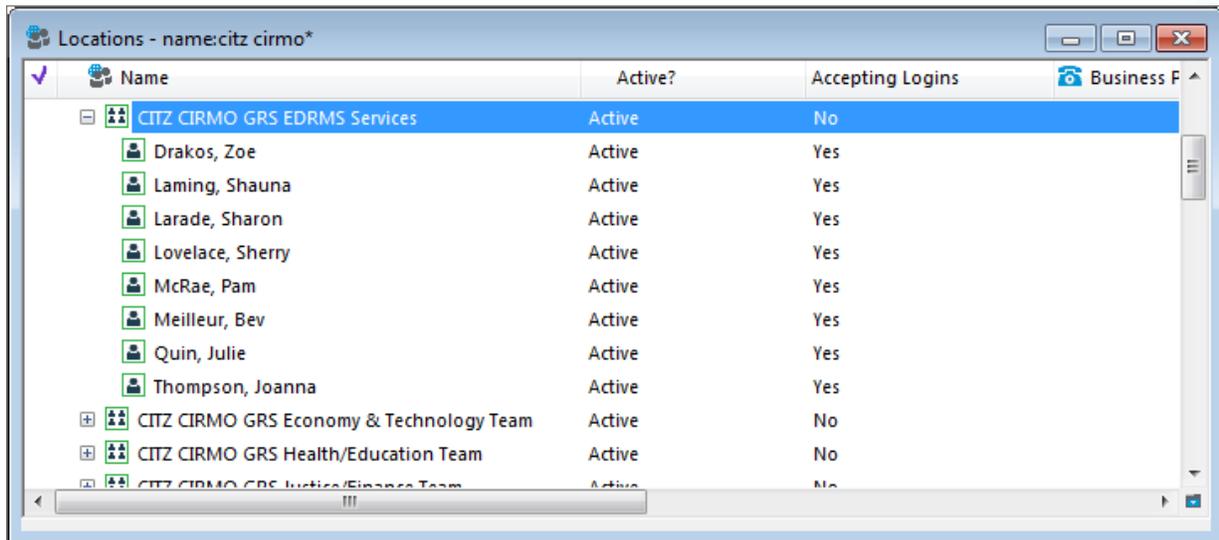
Search for	Search by	Matching criteria
 Locations	Display Name	Ministry of Citizens' services

Locations - name:Ministry of Citizens' services - 1 L...			
	 Name	 Access Approver	User Type
	 Ministry of Citizens' Services		ARIS 80186  No login access -
	 CITZ ADM & EFO Corporate Services		ARIS 90054  No login access -
	 CITZ ADM CRO Corp Info and Records Mgmt Office	Charmaine Lowe, ADM	ARIS 90436  No login access -
	 CITZ ADM Government Digital Experience Division	G. Sall, Mgr. Talent S...	ARIS 90039  No login access -
	 CITZ ADM OCIO Enterprise Services		ARIS 84794  No login access -
	 CITZ ADM Procurement & Supply Services	DeAndra Chmelyk, Di...	ARIS 84370  No login access -
	 CITZ ADM Real Property Division	Tracy Cooney, Div. Re...	ARIS 91066  No login access -
	 CITZ ADM Service BC	Stu Hackett (ED Servi...	ARIS 80225  No login access -
	 CITZ Assoc DM, Citizens' Services		ARIS 80314  No login access -
	 CITZ Assoc DM, Office Chief Information Officer		ARIS 90433  No login access -
	 CITZ CS Corporate Planning and Projects		ARIS 90050  No login access -

3. Click the plus sign (+) beside the Ministry name to display all the organizations nested under it.

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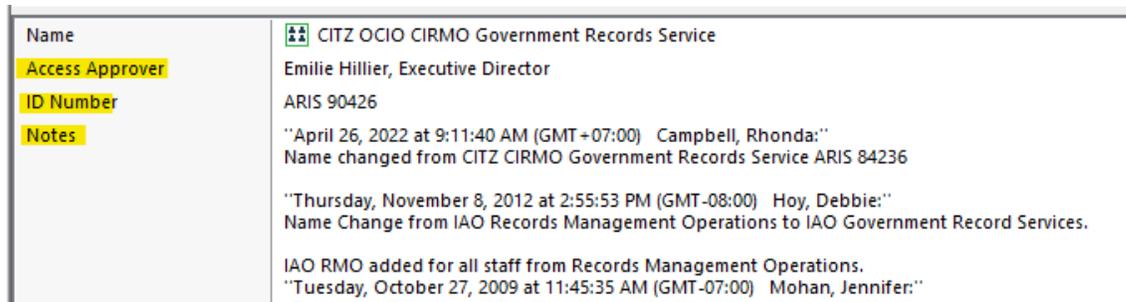
4. Find the organization you are looking for, Click the plus sign (+) to see a list of all the users in that location.



The screenshot shows a window titled 'Locations - name:citz cirmo*'. It contains a table with the following columns: Name, Active?, and Accepting Logins. The first row is expanded to show a list of users.

Name	Active?	Accepting Logins
CITZ CIRMO GRS EDRMS Services	Active	No
Drakos, Zoe	Active	Yes
Laming, Shauna	Active	Yes
Larade, Sharon	Active	Yes
Lovelace, Sherry	Active	Yes
McRae, Pam	Active	Yes
Meilleur, Bev	Active	Yes
Quin, Julie	Active	Yes
Thompson, Joanna	Active	Yes
CITZ CIRMO GRS Economy & Technology Team	Active	No
CITZ CIRMO GRS Health/Education Team	Active	No
CITZ CIRMO GRS Justice/Finance Team	Active	No

5. Useful information can be found in the **View Pane**, like who the **Access approver** is for the organization, the ARIS ID (if it has been added) and **Notes** on the history of name changes. Right click in the **View Pane** and select **Customize** to add or remove fields.



The screenshot shows the 'View Pane' for the organization 'CITZ OCIO CIRMO Government Records Service'. It displays the following information:

Name	CITZ OCIO CIRMO Government Records Service
Access Approver	Emilie Hillier, Executive Director
ID Number	ARIS 90426
Notes	"April 26, 2022 at 9:11:40 AM (GMT+07:00) Campbell, Rhonda:" Name changed from CITZ CIRMO Government Records Service ARIS 84236 "Thursday, November 8, 2012 at 2:55:53 PM (GMT-08:00) Hoy, Debbie:" Name Change from IAO Records Management Operations to IAO Government Record Services. IAO RMO added for all staff from Records Management Operations. "Tuesday, October 27, 2009 at 11:45:35 AM (GMT-07:00) Mohan, Jennifer:"

Important:

Users who you identify should no longer have access to EDRMS Content Manager should be deactivated as soon as possible. To modify or deactivate a user, complete the [EDRMS Content Manager Access Form](#) and submit to EDRMS.HELP@gov.bc.ca.

Searching for all users in a Ministry:

To get a list of all users associated to a specific ministry and all their associations do a search for **members of** a ministry.

1. On the quick search bar, choose **Locations** and **Members of** and type in the name of the ministry you are searching for.

The screenshot shows a search interface with three main sections: 'Search for', 'Search by', and 'Matching criteria'. Under 'Search for', a dropdown menu is open showing 'Locations' selected. Under 'Search by', a dropdown menu is open showing 'Members Of' selected. Under 'Matching criteria', the text 'Ministry of Citizens' services' is entered.

2. Now click **F7** to refine the search and tick the box that says **Recursive**.

The screenshot shows a dialog box titled 'Search for Locations'. It has tabs for 'Search', 'Filter', 'Sort', 'Results', and 'Options'. The 'Search' tab is active. Under 'Search By', 'Members Of' is selected. Below that, the text 'Enter the Name of the Location you wish to search by' is followed by 'Ministry of Citizens' services'. At the bottom, the 'Recursive' checkbox is checked.

3. Then go to the **Filter** tab and tag only **Person**, **Active** and **Internal**.

The screenshot shows the 'Search for Locations' dialog box with the 'Filter' tab selected. Under 'Location Type filters', a list of options is shown: Unknown, Organization, Group, Position, Person (checked), Project Team, Committee, Venue, Workgroup, and Storage Provider. Under 'Other Locations filters', the 'Active' and 'Internal' checkboxes are checked, while 'Inactive', 'External', and 'Show Locations without 'can use' access' are unchecked. At the bottom, there is a checkbox for 'Set as default filters' which is unchecked.

4. This will now list all users within that ministry. Tag all then right click and select **Send to** then **Print Report**. Choose **GOV USER DEFAULT ORG PROFILE ASSOC.** which will list all users and their associations. (see below for information on reports).

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How to print PDF reports:

Select an organization or tag individual users, right click, **Send to** and **Print Report**.

There are 2 reports to choose from:

1. **GOV ORG or GROUP MEMBERS** which shows Username | Default Organization | User Type.

Membership - Organizations and Groups

<i>Page</i> 1		
<i>Date</i> 2023-02-09		
<i>Time</i> 2:35:08 PM		
<i>Login Name</i> Zoe Drakos		
CITZ OCIO CIRMO GRS EDRMS Services Campbell, Rhonda	CITZ OCIO CIRMO GRS EDRMS Services	Administrator
Drakos, Zoe	CITZ OCIO CIRMO GRS EDRMS Services	Administrator
Gowe, Vanessa	CITZ OCIO CIRMO GRS EDRMS Services	Administrator Custom Information Manager EDI
Larade, Sharon	CITZ OCIO CIRMO GRS EDRMS Services	Administrator
Staven, Julie	CITZ OCIO CIRMO GRS EDRMS Services	Administrator Custom Information Manager EDI
Thompson, Joanna	CITZ OCIO CIRMO GRS EDRMS Services	Administrator

2. **GOV USER DEFAULT ORG PROFILE ASSOC** which shows UserName | UserType | Default Organization | Associations.

Locations: User Name, Profile and Associations, Default Org.

<i>Page</i> 1			
<i>Date</i> 2023-02-09			
<i>Time</i> 2:40:03 PM			
<i>Login Name</i> Zoe Drakos			
User Name	User Profile	User Default Organization	Associations
Campbell, Rhonda	Administrator	CITZ OCIO CIRMO GRS EDRMS Services	Administrator Group Central EDRMS Help Only; CITZ OCIO CIRMO GRS EDRMS Config Main Access Group; CITZ OCIO CIRMO GRS EDRMS Services
Drakos, Zoe	Administrator	CITZ OCIO CIRMO GRS EDRMS Services	Administrator Group Central EDRMS Help Only; Administrator Group EDRMS Administrators Only; CITZ OCIO CIRMO GRS EDRMS Config Main Access Group; CITZ OCIO CIRMO GRS EDRMS Services

NOTE: This one should be used for individual User Locations where you want to know what each user has access to as it will list all their memberships/associations. In this instance you would tag the individual names you want that are under the organization location.

