Configuring EDRMS Content Manager

NOTE: EDRMS Content Manager needs to be configured the first time you use it, or if you change your computer, or if your computer has been re-imaged.

Please refer first to **TIP 002A (CRMB PROD), B (FOR PROD) or C (SOCI PROD): Selecting EDRMS Content Manager Datasets** for information about how to select a dataset, then continue with these configuration steps.

If you <u>do not</u> use Electronic Folders or documents, then you only need to do the Configuration Settings and can skip the desktop add-ins set up.

Inquiry Users: Only need to do steps 1-4 and do not need the desktop add-ins set up.

To set your Configuration Settings:

1. In EDRMS Content Manager, select **Options** from the **File** menu.
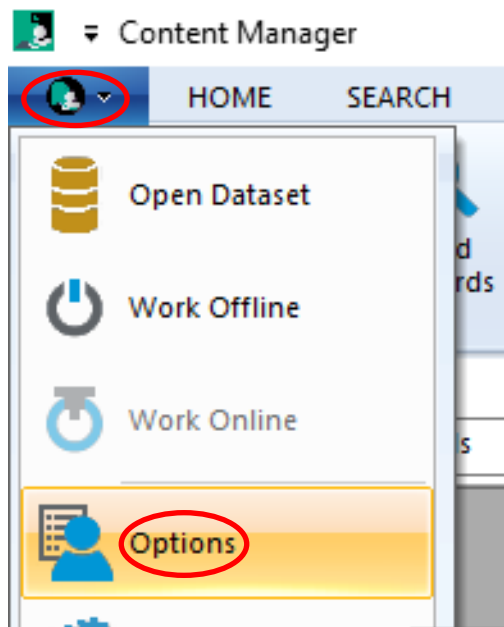
2. On the **Content Manager options** popup, select **Get Global.** This populates all the tabs appropriately with the default settings for use in the system.
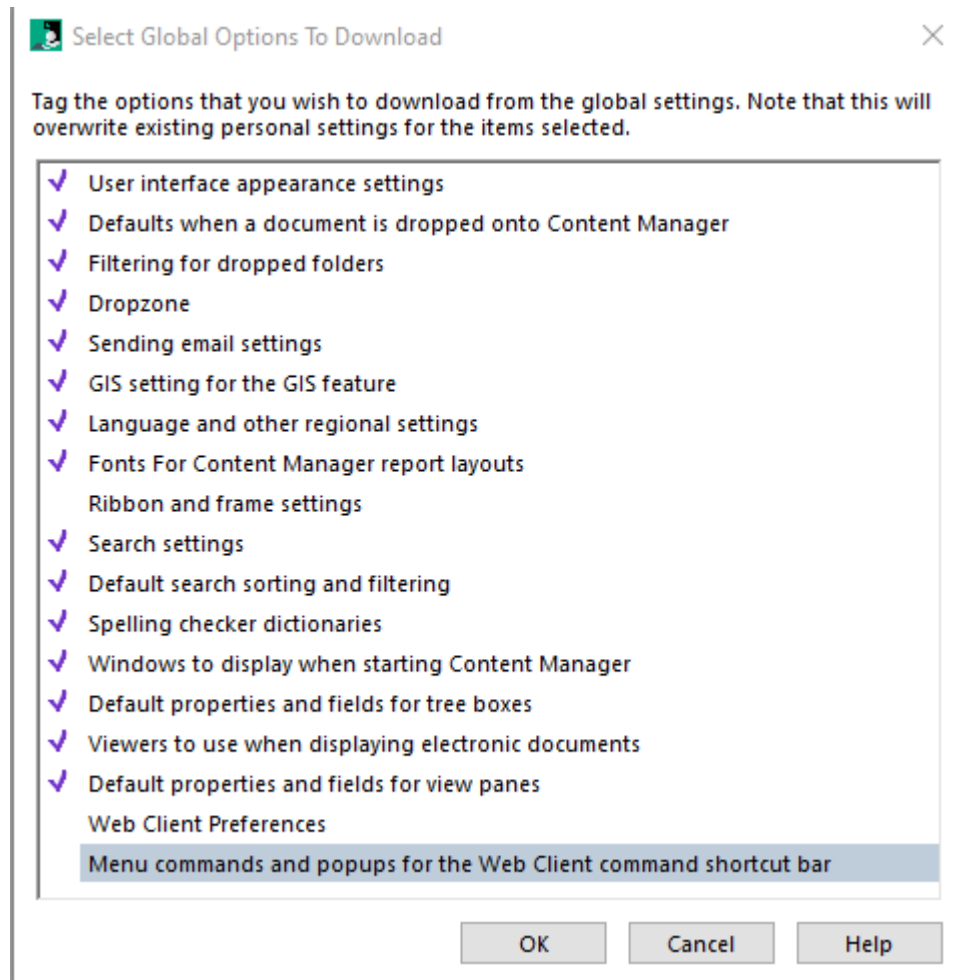
EDRMS CONTENT MANAGER TIP 003A

Note: *If you are unable to see the Get Global button or are unable to click on it, please go to your Windows Display settings on your computer and set the screen resolution to 100-125% max. This should allow you to now select Get Global to proceed with the instructions. Once you have completed the instructions you can go back and set your resolution to what works best for you.*
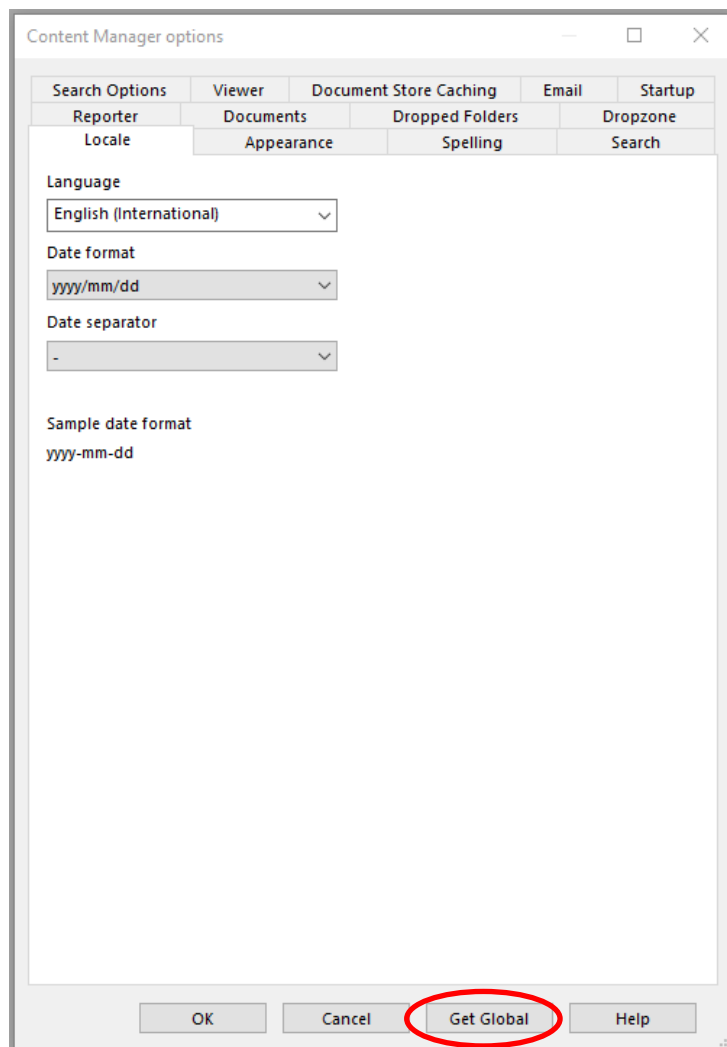
3. On the **Select Global Options to Download** popup, select all options EXCEPT the following: **Ribbon and frame settings**, **Web Client Preferences**, **Menu commands and popups for the Web Client command shortcut bar**.

Select Global Options To Download   ✕

Tag the options that you wish to download from the global settings. Note that this will overwrite existing personal settings for the items selected.

✔ User interface appearance settings
✔ Defaults when a document is dropped onto Content Manager
✔ Filtering for dropped folders
✔ Dropzone
✔ Sending email settings
✔ GIS setting for the GIS feature
✔ Language and other regional settings
✔ Fonts For Content Manager report layouts
  Ribbon and frame settings
✔ Search settings
✔ Default search sorting and filtering
✔ Spelling checker dictionaries
✔ Windows to display when starting Content Manager
✔ Default properties and fields for tree boxes
✔ Viewers to use when displaying electronic documents
✔ Default properties and fields for view panes
  Web Client Preferences
  Menu commands and popups for the Web Client command shortcut bar

OK   Cancel   Help

4. Click **Ok**. It will take a moment for the Global options to download.

   Note: This step configures your default settings in the system. If you click on Get global again, the settings you selected will no longer show as tagged because they are already set.

5. Select the **Documents** tab:

- On the **Documents** Tab, make sure the setup is as shown below:
- Under **Default record type**, click the blue **KwikSelect** folder and select your ministry or organization's Default Record Type***** (which is your ministry acronym + Document).
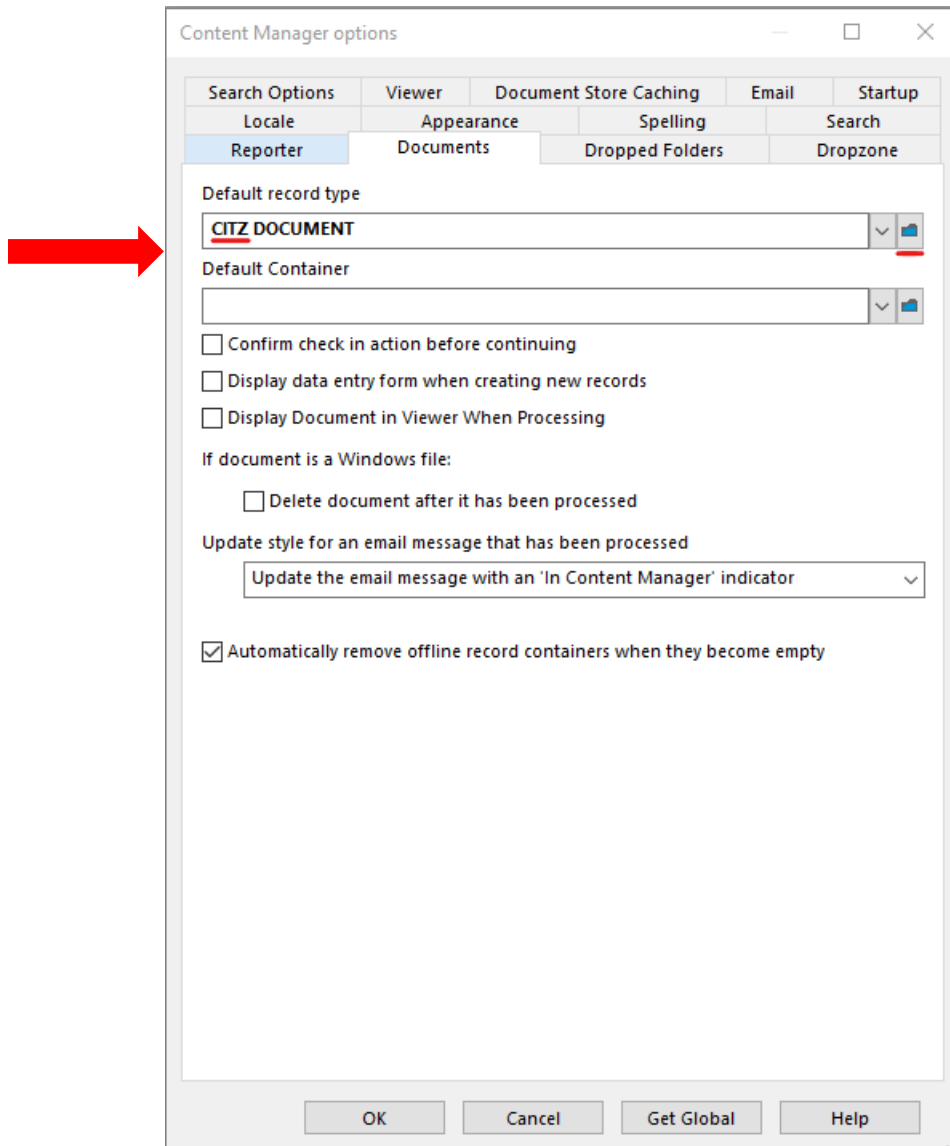
This is an example of a default record type. Use **your** Ministry acronym in place of CITZ.

***If you are an INQUIRY USER, you do not need to fill this in.**

6. Click **OK** to close the **Content Manager Options** popup and return to your home screen.

EDRMS CONTENT MANAGER TIP 003A

Desktop Add-Ins

If you use **Electronic Folders** and **Documents** the next step shows you how to set up the EDRMS CM Add Ins. If you only manage **Physical Folders,** you **do not** need to do this step.

1. From the **File** menu, select **Desktop Add-Ins**:

    -   On the **Content Manager Desktop Add-ins** popup, check the boxes for Microsoft Word, Microsoft Excel, Microsoft PowerPoint, and Microsoft Outlook.
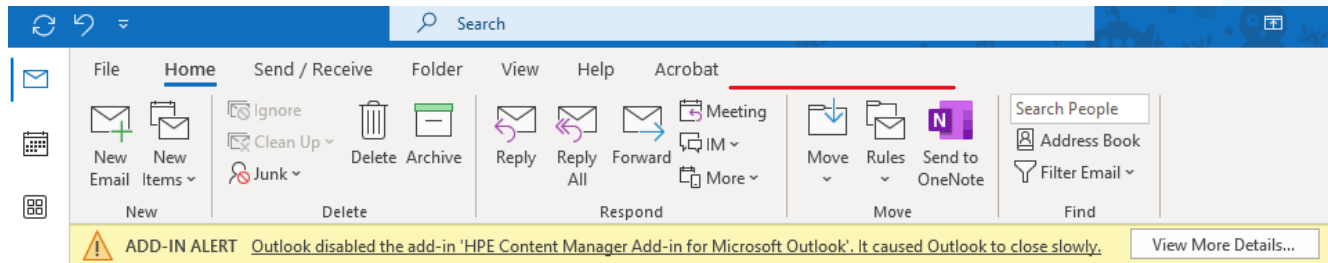   -   Click **OK**.
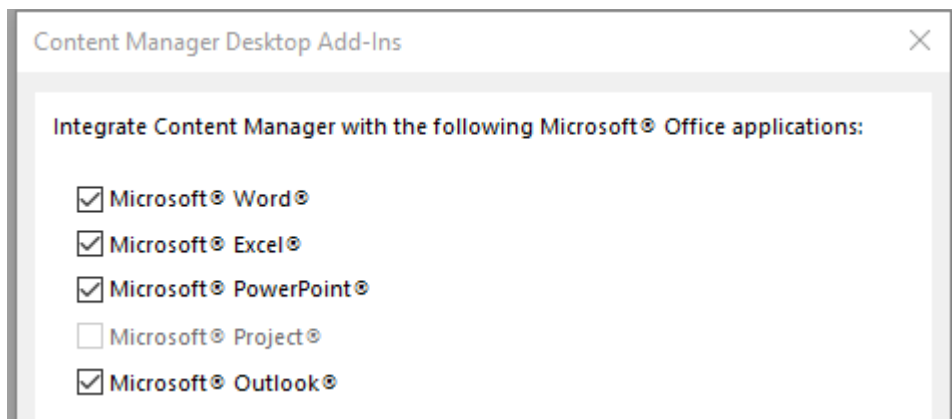
2. Open Microsoft Outlook.

    If you already had Outlook open while you were completing the steps above, please close Outlook. When you reopen Outlook, the **HPE Content Manager** tab will be displayed across the top of your Outlook screen.
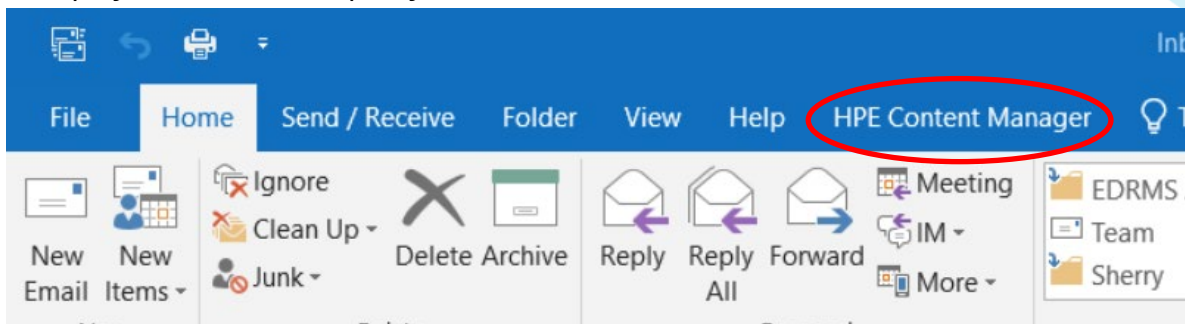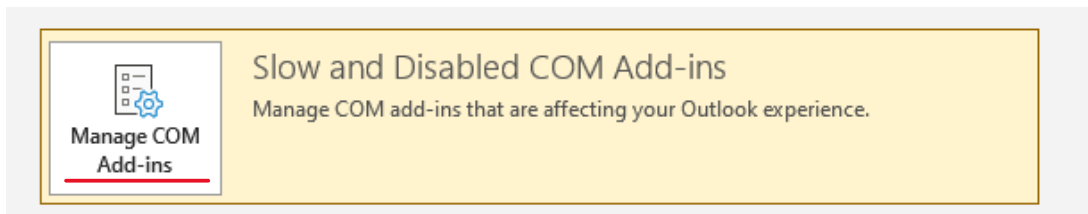
EDRMS CONTENT MANAGER TIP 003A

3. If the **HPE Content Manager** tab does not appear OR a message appears under the menu saying the Add-in has been disabled.
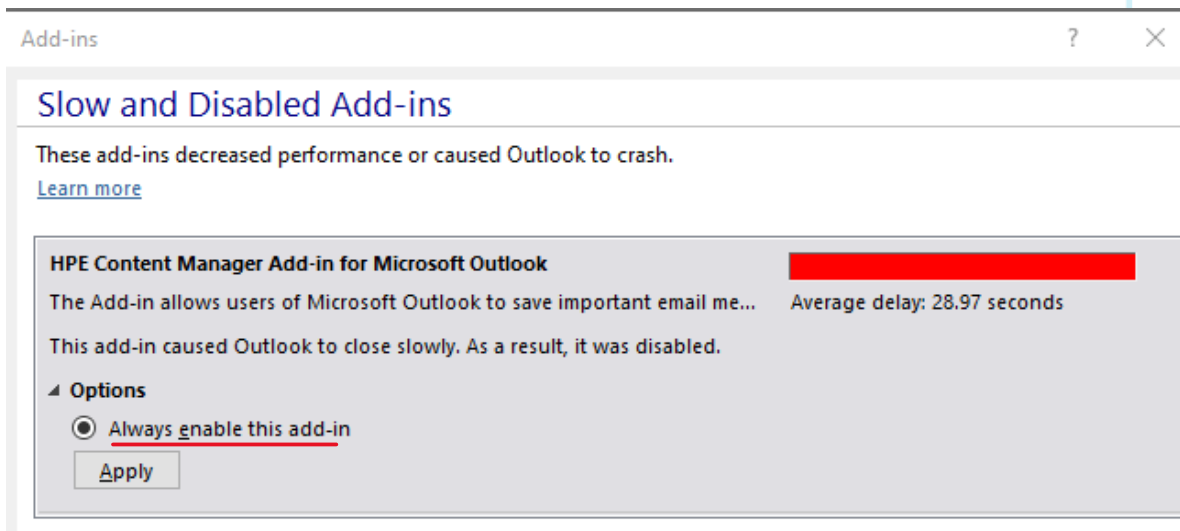

4. Then to enable it:

- Either click **View More Details** OR click on **File**, locate **Slow and Disabled COM Add-ins** and click on **Manage COM Add-ins.**
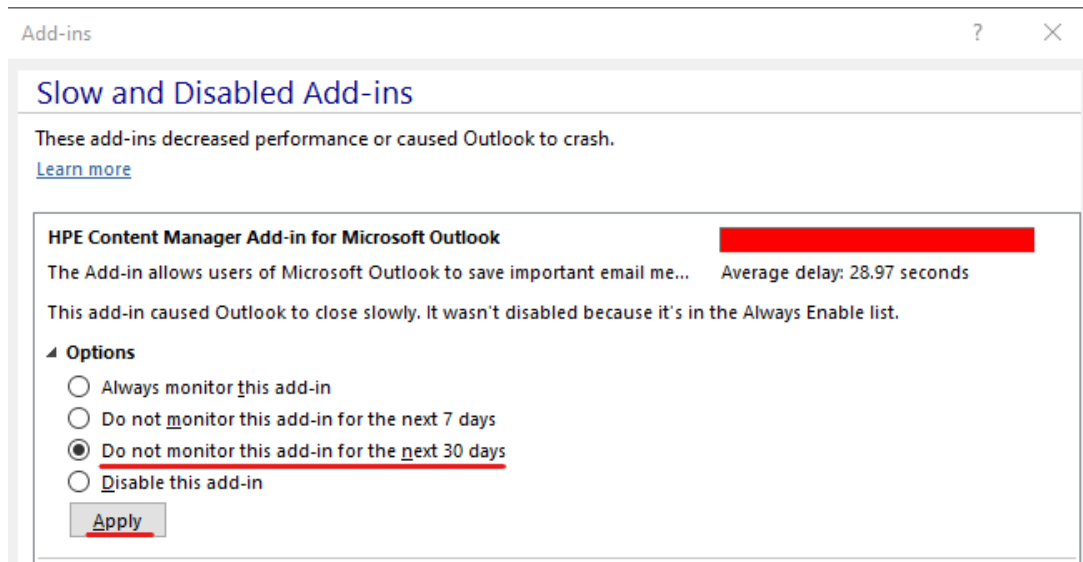

- This will open the screen below, click on **HPE Content Manager Add-in** for Microsoft Outlook and select **Always enable this add-in** and click **Apply**.

- An options screen will appear, select **Do not monitor this add-in** for the next 30 days and click **Apply** then click **Close.**

- Now close **Outlook** and reopen it and the Add-in should appear.

- If the Add-in does not appear, please use **Tip 003B Disabled Outlook Add-In** to troubleshoot further starting at step 2.

 If you still require assistance, please contact EDRMS.Help@gov.bc.ca.