

Moving Documents from LAN Folders to EDRMS Content Manager and Document Queues

Notes:

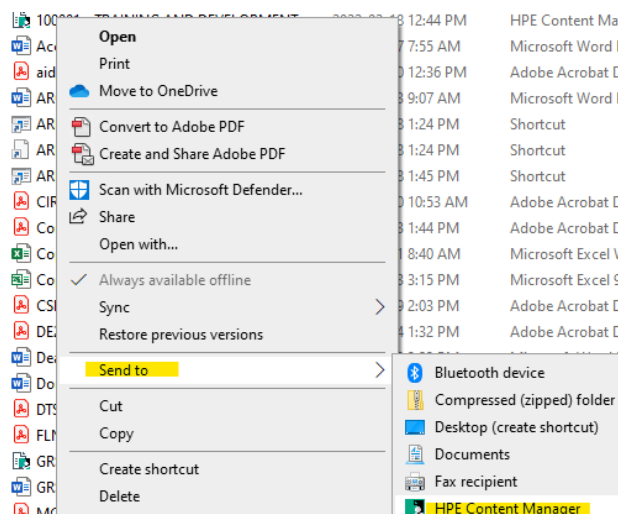
- It is not recommended to save emails to a LAN for filing into EDRMS Content Manager as changing the title of a saved email on your LAN **will not** update the actual subject of an email and EDRMS CM automatically pulls the title of an email from its subject line. If you must save to a LAN, ensure the subject line is updated first before saving it so that there is no need to rename the email on your LAN.

Or if you already have emails saved to the LAN and need the title to be different from the email subject line, then you can update the **Title (Free Text Part)** after uploading into EDRMS CM.

- If using Numbers in the titles be aware that EDRMS CM sorts lexicographically so you need to number items as 0001, 0002,0010, 0011, otherwise it will sort it this way: 1, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 2, 20, 21 etc.

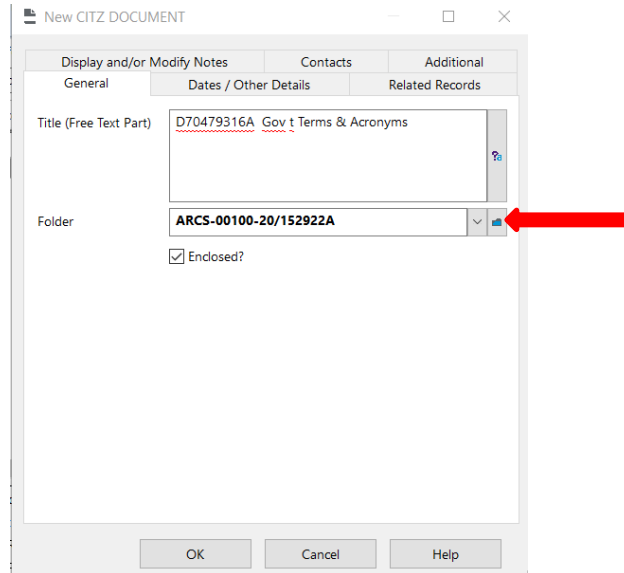
Moving a Single Document:

1. Locate the E-folder in EDRMS Content Manager into which you want to move the document. If you don't already have a folder, create one. If you are an **End user**, ask an **Information worker** to create for you (Refer to **TIP 005 Creating a Record**)
2. Copy the **Record Number** of the folder from the **View** pane.
3. Locate the document on the LAN that you want to move. **Right click**, select **Send to**, the **HPE Content Manager**.



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4. A **New Document** pop-up window appears. If you need to update the **Title (Free Text Part)** you can do so now. Paste in the record number into the **Folder** field or use the drop down to select a recently used folder or click the blue **KwikSelect** folder to search for a folder to file within. Click **OK**.



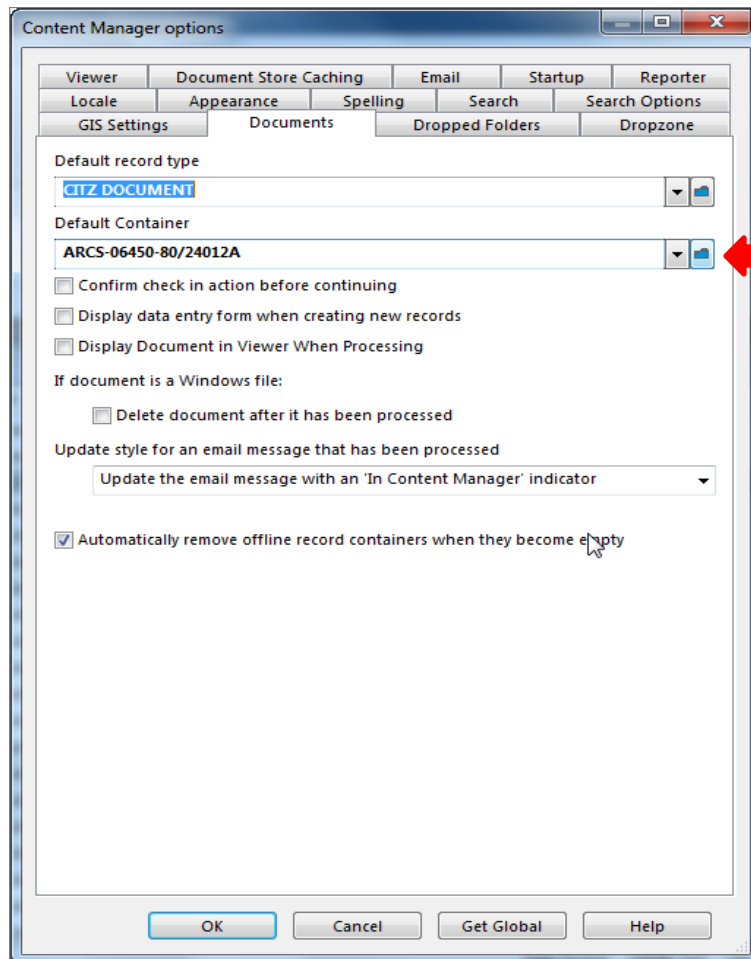
Note: Updating the title here will not update the title of the actual document.

Moving Multiple Documents into One Folder:

1. Locate the E-folder in EDRMS Content Manager into which you want to migrate the documents. If you don't already have a folder, create one. If you are an **End user**, ask an **Information Worker** to create one.
2. Copy **Record Number** of the folder from the **View** pane.
3. Locate the folder or documents on the LAN that you want to move:
Check for sub-folders – migration must be done at the lowest folder level and should not contain other folders in it. **Please note:** that too many nested folders can cause an error if the file path length is too large. Move documents to a new folder without sub-folders if this happens.
Select the folder and **right click**.
Select **Properties**. Review the number of documents in the folder (you can migrate a maximum of 300 documents if you are moving them to a new e-folder, fewer for folders with existing documents).
4. Set up EDRMS Content Manager: you will need to set up a default container in order to move documents into EDRMS CM.
5. Select **Options** from the **File** Menu.

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6. On the Content Manager options popup, select Documents tab:



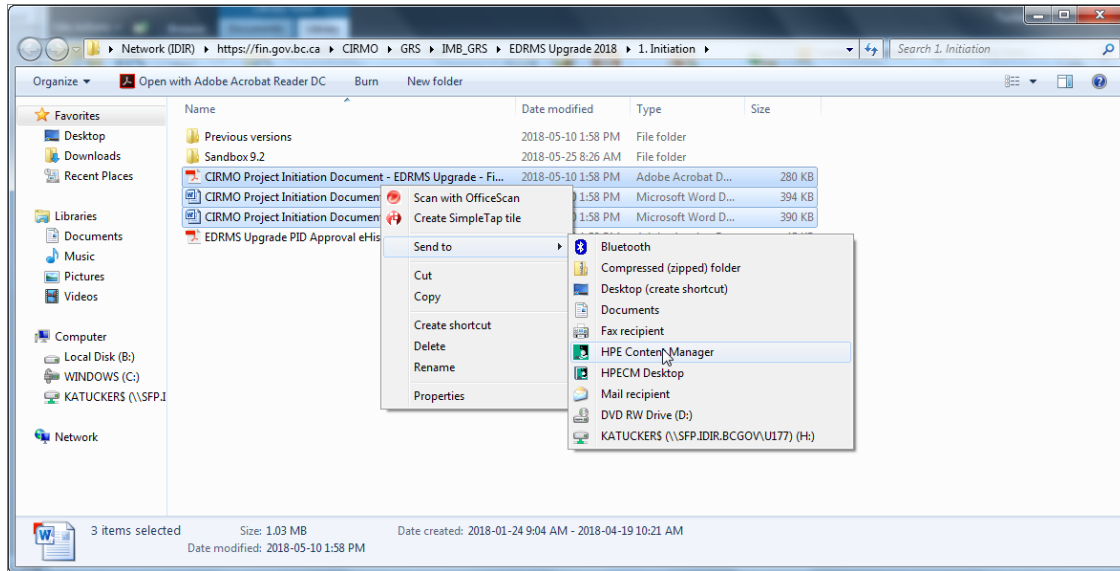
7. The **Default Record Type** is the document type for your ministry. This should be already populated with your ministry document type. Use the blue **KwikSelect** folder to change if required.
8. In the **Default Container** field, paste the record number of the folder to which you want to move the documents.

Ensure that the **Confirm Check in Action before continuing** box is unchecked. If this box is checked, you will be prompted to confirm every record as it goes into EDRMS Content Manager. Click **OK**.

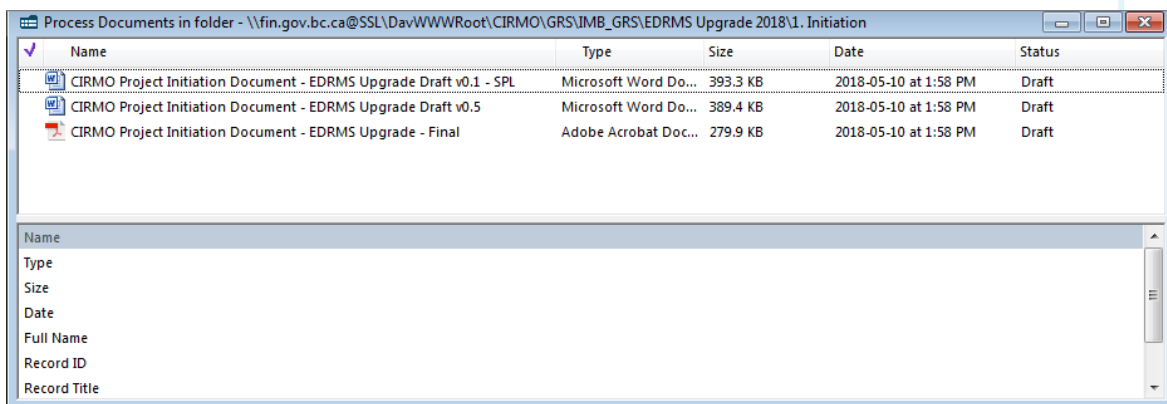
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Send records to EDRMS Content Manager:

1. **Right click** on the LAN folder you want to migrate. **Or** highlight a selection of documents within a folder that you want to migrate and then **Right click**.
2. Select **Send To, HPE Content Manager**.



3. Click **OK**. The **Process Documents in Folder** window is displayed, with the records listed that you want to migrate. The status column will show them with a status of **Draft**.

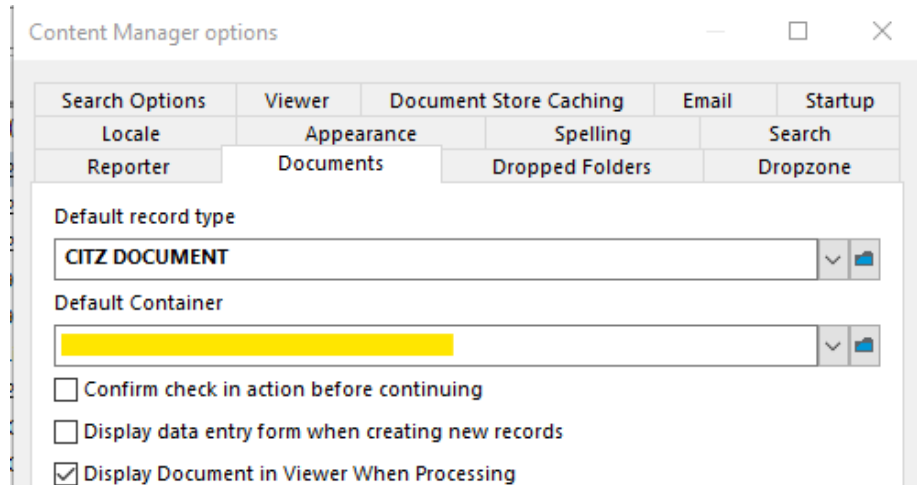


4. Tag all the records (from **Search Tab**, select **Tag All**)
5. Right click, **Check In**.
6. The records will be checked in and their status in the **Process Documents in Folder** will have changed to **Original**.
7. Close the window once complete.

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Remove default container information:

1. In EDRMS Content Manager, select **Options** from the **File** menu.
2. On the **Content Manager options** popup, select the **Documents** tab.
3. Remove the record number* you entered in the **Default Container** field.



4. Click **OK**.

*If you do not perform this step, all future records you migrate will go to into this folder until you change it or remove it.

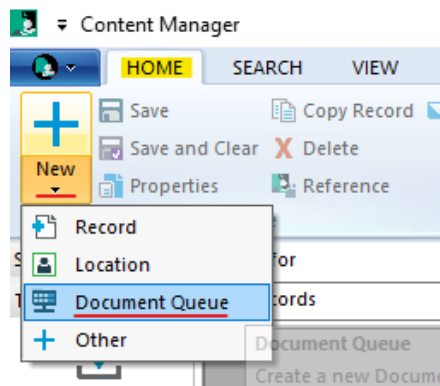
Note:

Electronic Folders now have an automated part rule that closes the folder and creates a new part after 300 documents have been added into it. Refer to **Tip 006 Electronic Folders and Parts** for further information.

Document Queues

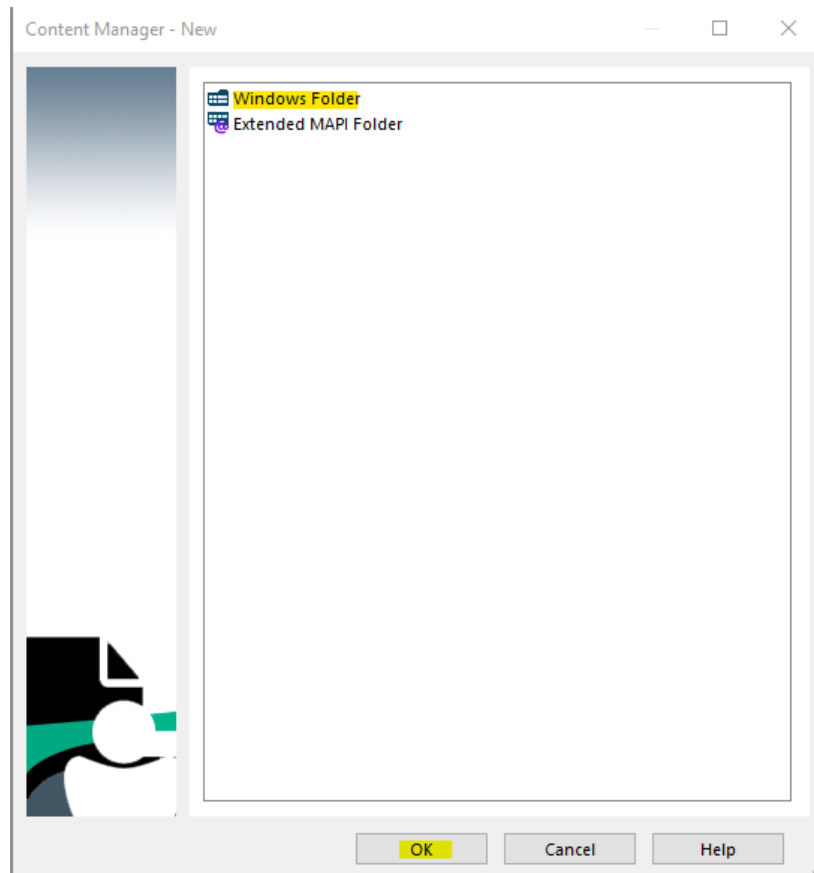
Link LAN folders to EDRMS with a **Document Queue**. This also allows for automatic filing of documents added to a LAN folder that is connected to a queue. So anytime you put a document into that folder it will be filed into EDRMS CM.

1. On the **Home** Tab, click **New** and choose **Document Queue**.

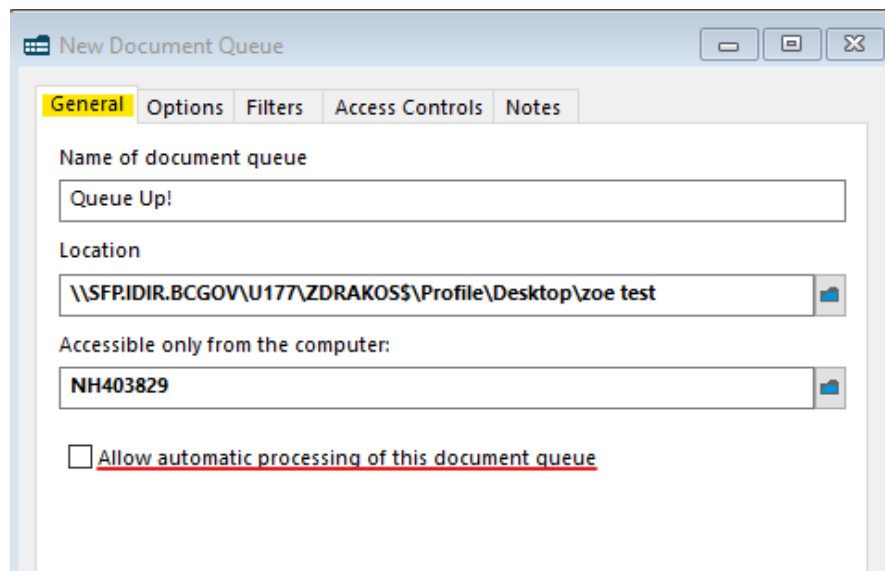


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2. Choose **Windows Folder**, click **OK**.



3. On the **New Document Queue** popup, add a name for the queue under **Name of document queue** and click on the blue **Kwikselect** folder beside **Location** field to navigate to the folder on the LAN you want to file. You can leave the computer number or remove it, depending on whether you use multiple computers.

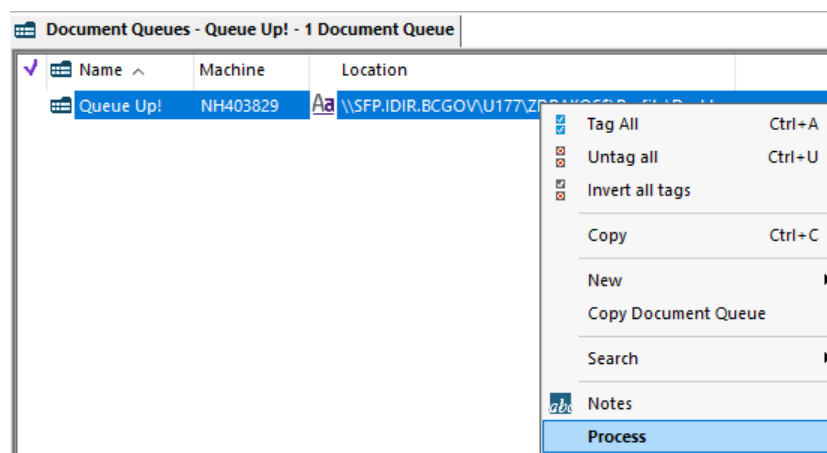


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4. Leave **Allow automatic processing of this document queue** unchecked unless you want documents to be filed automatically into EDRMS CM when documents are added to the LAN folder.
5. Now go to the **Options Tab**, Add the type of document you use in the **Default Record Type** field and the **record number** of the E-folder you want the documents to file into then check boxes as per below screenshot and finally choose **No synchronization** under **After processing each document** field. Click **OK**.

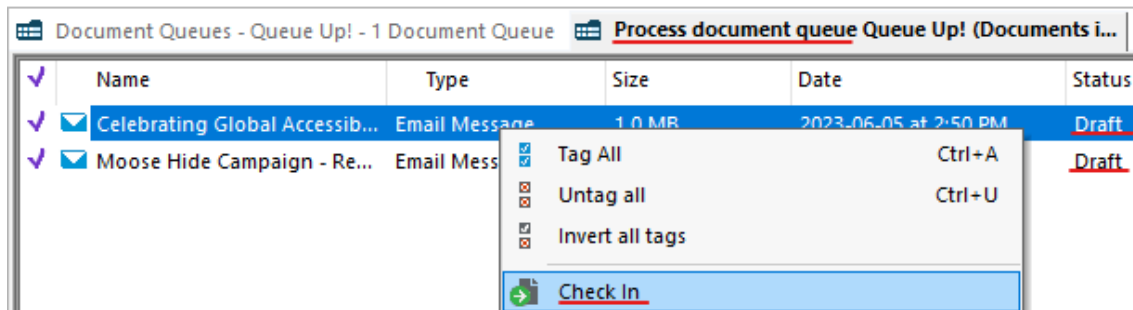
The screenshot shows the 'Document Queue - Queue Up!' dialog box with the 'Options' tab selected. The 'Default record type' is set to 'CITZ DOCUMENT'. The 'Default container (folder/box)' is set to 'ARCS-00100-20/145122A'. The 'Automatically view the current document' checkbox is unchecked. The 'When checking in all documents, ignore original documents' checkbox is checked. Under 'When a document is being processed:', the 'Check for internal links to other documents' checkbox is checked, 'Confirm check in action before continuing' is unchecked, and 'If possible, suppress entry form when creating new records' is checked. Under 'After processing each document:', the dropdown is set to 'No synchronization'. The 'OK', 'Cancel', and 'Help' buttons are at the bottom.

6. The **Document Queues** window will open in a new window, tag it and right click, and select **Process**.

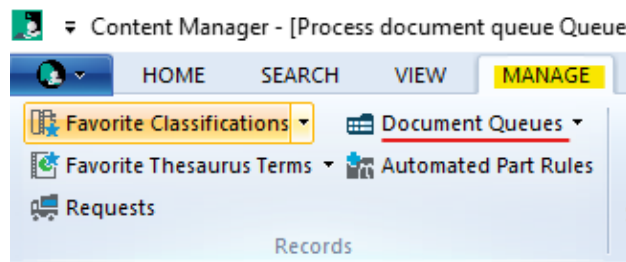


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7. A **Process document queue** window will open. Now **Tag All** documents, right click, and select **Check In**. The documents will be checked into the correct folder and will show **Status** as Original. Close the **New queue** window when complete.

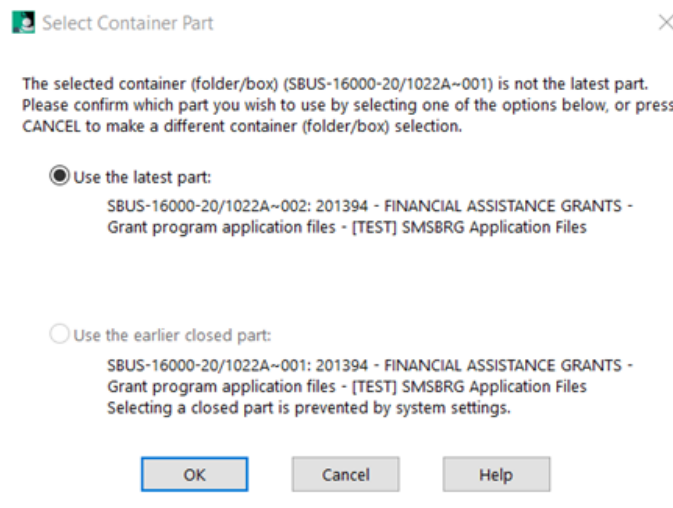


8. Go to LAN folder and delete or remove the documents if you will be using this folder again for this queue to avoid filing the documents again.
9. Anytime you want to run this queue, go to the **Manage** Tab, and click **Document Queues**, find the queue you want to use.



Note:

If you have more than 300 documents to file from the LAN Folder the system will create a new part and a popup will appear asking whether to put the next document into the latest part as the previous one is now closed and will proceed to ask this for each document left in the queue to file which can be onerous if you have lots of documents left to file



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There are two options to work around this:

1. Remove the automated part rule on the target folder and process the queue. This would mean that if you had 1000 documents to file, they would all be filed to a single folder. You would then have to create a new part, add 300 documents to it, then create a new part, add 300 more until each part has 300 documents in it. If you need to continue filing to that same folder, you would have to then update the queue to reflect the new part number, double check that the folder doesn't have a part rule applied, and then follow the same process until that folder is no longer required for filing, at which point you can close the last part.

OR

2. Run a count on the contained records in your target file in EDRMS CM prior to processing your queue and have only the number of documents tagged (or in the LAN Folder) to make up numbers to 300 prior to processing just so you can limit the potential number of times that popup will appear.

If you have questions about this process, please contact EDRMS.Help@gov.bc.ca for further assistance.