

# Customizing EDRMS Content Manager

Customizing and setting up your own unique preferences in EDRMS Content Manager helps you see and manage your records more easily in the system.

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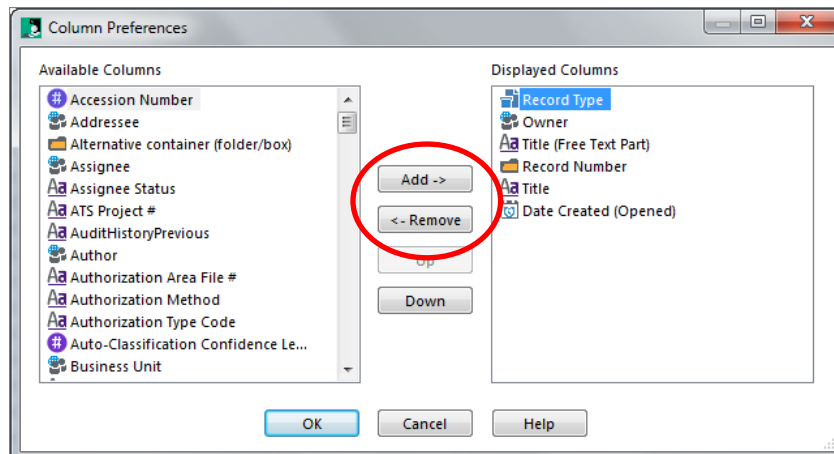
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## 1. Formatting and Customizing Columns

1. You can set column preferences based on your business needs, your EDRMS Content Manager User Role, and the tasks you perform.

### To set column preferences:

1. From the **View** tab, select **Format Columns**. The **Column Preferences** popup is displayed. The **Available Columns** window displays the columns that you can add to your list pane. You can also display the **Column Preferences** popup by right clicking anywhere in the column header and selecting **Format Columns**.
2. To add a column, select it from the **Available Columns** list and click **Add**. The **Displayed Columns** on the right side shows the columns that are displayed in your list pane. You can click **Up** and **Down** to change the order of display of the columns.
3. To remove a column, select it from the **Displayed Columns** list and click **Remove**.
4. Click **OK**.



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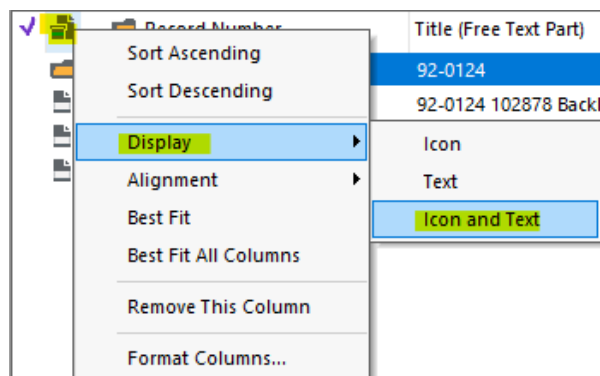
### Certain columns are especially useful for tasks:

For example:

- Home, Location and Assignee are useful when doing inventories.
- Date Due for Semi Active, Date Due for Destruction, Date Due for Archive (SR), and Date Due for Archive (FR) are required when culling records
- The following columns can be useful in the boxing and disposition process:
- Container (Folder/Box)
- Series Record allows you to check the OPR
- Disposition
- Retention Schedule
- Date Created
- Content Start Date
- Content End Date
- Closed Date
- SO Date is a good way to check that SO dates are entered and are correct
- Date Due for Destruction
- Date Due for Archive (SR)
- Date Due for Archive (FR)

### To view column header Icon and/or Text:

It may also be helpful to have the column header showing both Icon and Text for search results. This is useful for record type searches as the default is just the icon. You can change this view option for each column category by Right clicking on the column header then Select **Display** and **Icon and text**.



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This changes the view from this:

Record Number	Title (Free Text Part)
REMS-12410-44/2710923A	92-0124
D3918923A	92-0124 102878 Backlog to RCS
D66867914A	633 Return 92-0124
D61801814A	626 Retrieve 92-0124

To this:

Record Type	Record Number	Title (Free Text Part)
CITZ OCIO CIRMO GOVERN...	REMS-12410-44/2710923A	92-0124
CITZ DOCUMENT	D3918923A	92-0124 102878 Backlog to RCS
CITZ DOCUMENT	D66867914A	633 Return 92-0124
CITZ DOCUMENT	D61801814A	626 Retrieve 92-0124

**Note:** The display of a search result may be slower if you have a large number of columns. To speed up your search, add columns **after** the search is complete.

You can also sort search results by clicking on a column header. See next section.

## 2. Sorting Columns

Sorting a list of records makes it easier to organize them and find the data you need to work with.

There are three ways to sort a list of displayed records:

### Sort in List Pane:

1. Right click on a column header in your List Pane.
2. Choose **Sort Ascending** or **Sort Descending** from the dropdown to arrange the column contents alphabetically/numerically in ascending or descending order.

Record Type	Record Number	Title (Free Text Part)	Date
FLNR TOPFN BCTS BABINE P-F	FOR-10005-40/84605F	881261 - FOREST SE...	2001
D - 100 MILE HOUSE E-FOLDER	FOR-15700-20/134808F	881261 - RANGE:US...	2008
FLNR DOCUMENT	D6555918F	Amendment to Ran...	2018
FLNR DOCUMENT	D34555117F	Judy_West_Reques...	2017
FLNR DOCUMENT	D19046317F	Email: Re: GL RAN0...	2017
FLNR DOCUMENT	D16656017F	Report and Transfe...	2017
FLNR DOCUMENT	D2529317F	Don West POA for...	2017
FLNR DOCUMENT	D3817516F	Range_Use_Report...	2011
FLNR DOCUMENT	D10903214F	RUP Extension RAN...	2014
FLNR DOCUMENT	D6296714F	2014- Range use pl...	2014
FLNR DOCUMENT	D431414F	Private land fence	2013
FLNR ROSA Cariboo 100 Mile District (D...	D395214F	RE: Helena Range	2013
FLNR ROSA Cariboo 100 Mile District (D...	D275414F	RE: Helena Vacancy	2011
FLNR ROSA Cariboo 100 Mile District (D...	D4330111F	Helena Range	2011
FLNR ROSA Cariboo 100 Mile District (D...	D7648909F	Range Use Plan an...	2008

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### Sort Search Results:

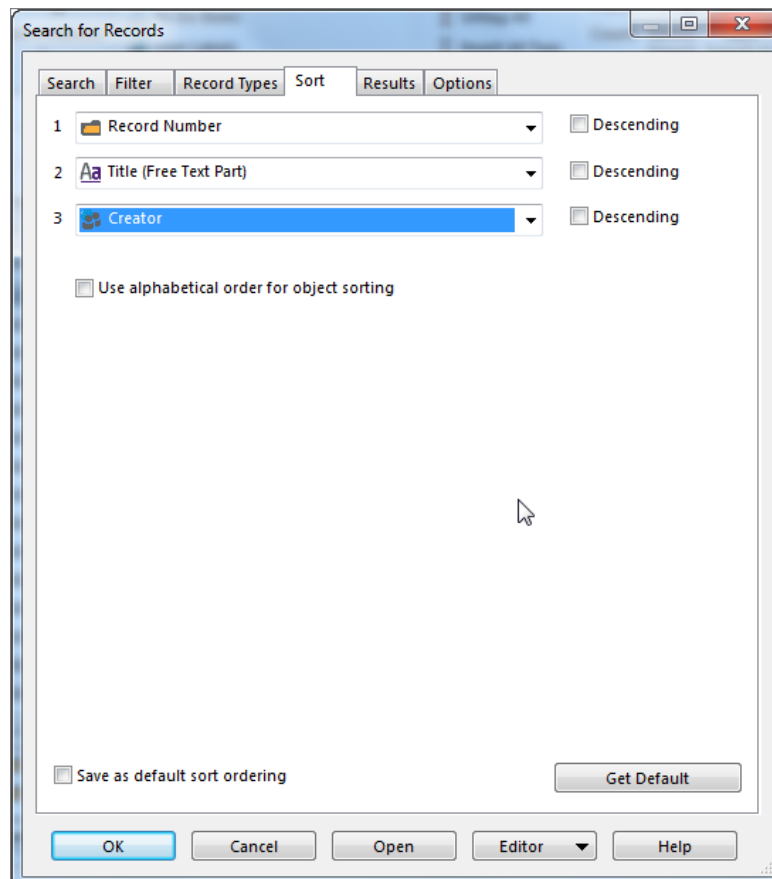
1. Click on a column header in your **List Pane**. The column contents will sort in ascending order.
2. Click again and the contents will sort in descending order. A small arrow next to the column name will indicate ascending or descending order.



Record Type	Owner	Title (Free Text Part)	Record Number	Title	Date
D - 100 MILE HOUSE E-FOLDER (DMH)	FLNR ROSA Cariboo 100 Mile District (D...	Johnston Kenneth Judy Tyrone Ingr...	FOR-15700-20/180109F	881261 - RANGE-US...	1999
D - 100 MILE HOUSE E-FOLDER (DMH)	FLNR ROSA Cariboo 100 Mile District (D...	95-7833 DMH 2009 APP ORCS DE	ARCS-00432-20/420709F	100001 - RECORDS ...	2009
D - 100 MILE HOUSE E-FOLDER (DMH)	FLNR ROSA Cariboo 100 Mile District (D...	96-1022	ARCS-00432-20/461710F	100001 - RECORDS ...	2010
D - 100 MILE HOUSE E-FOLDER (DMH)	FLNR ROSA Cariboo 100 Mile District (D...	DMH Accession 95-0416	ARCS-00432-20/506711F	100001 - RECORDS ...	2011

### Sort Found Records:

1. From the **Search** tab, select **Records** and then **Find Records**. On the **Search for Records** Popup, add in your search criteria under the **Search** tab.
2. Now use the **Sort** tab to determine the sort order of your search results. You can specify up to 3 sort fields, in ascending or descending order. You can check the box for **Save as default sort ordering** at the bottom left and this sort order will be defaulted for all searches hereafter.
3. Click **OK**.



Search for Records

Search Filter Record Types Sort Results Options

1 Record Number Descending

2 Title (Free Text Part) Descending

3 Creator Descending

☐ Use alphabetical order for object sorting

☐ Save as default sort ordering

Get Default

OK Cancel Open Editor Help

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Sorting columns is useful for grouping various records in a search results list.

For example:

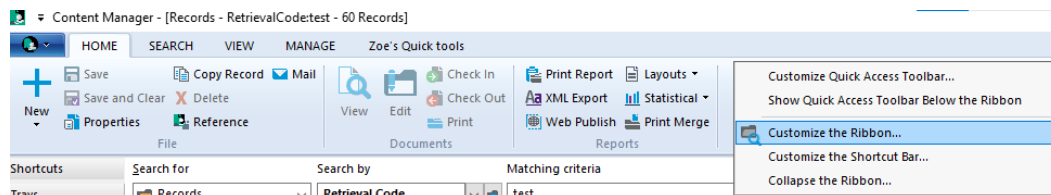
- Sorting by **Assignee** will group records signed out to certain individuals.
- Sorting by **Date Due for Destruction** will group records by their destruction date.

### 3. Customizing the Ribbon

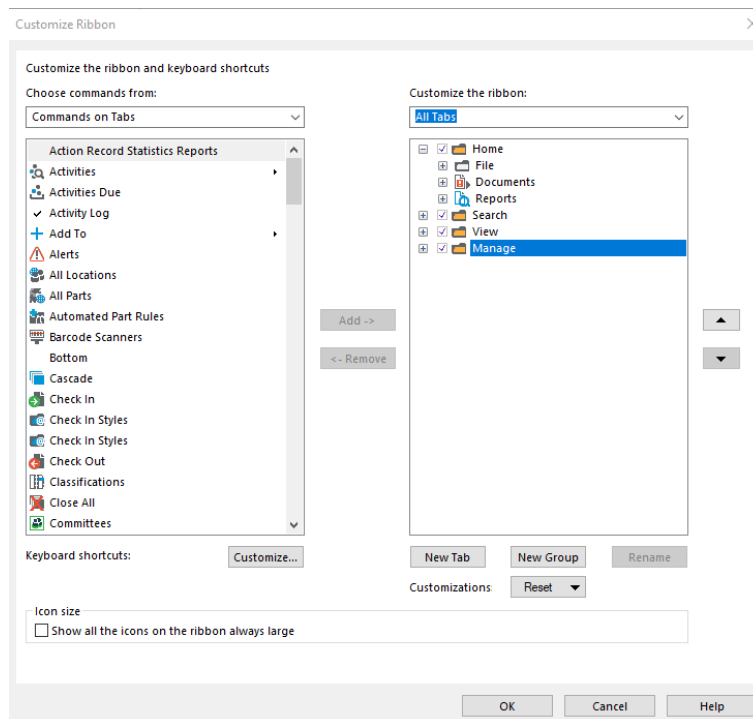
Instead of menus, EDRMS Content Manager has a **Ribbon** across the top of the screen that displays **Tabs** with groupings of commands. The default **Ribbon** tabs are **Home**, **Search**, **View**, **Manage**, **Administration**. You can create, remove, rename and reorder custom Ribbon tabs, groups and commands as needed.

To customize the Ribbon:

1. Right click in the **Ribbon** area then Select **Customize the Ribbon**.



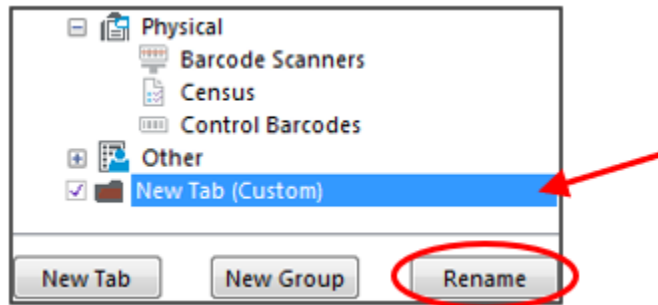
2. The **Customize Ribbon** pop up appears:



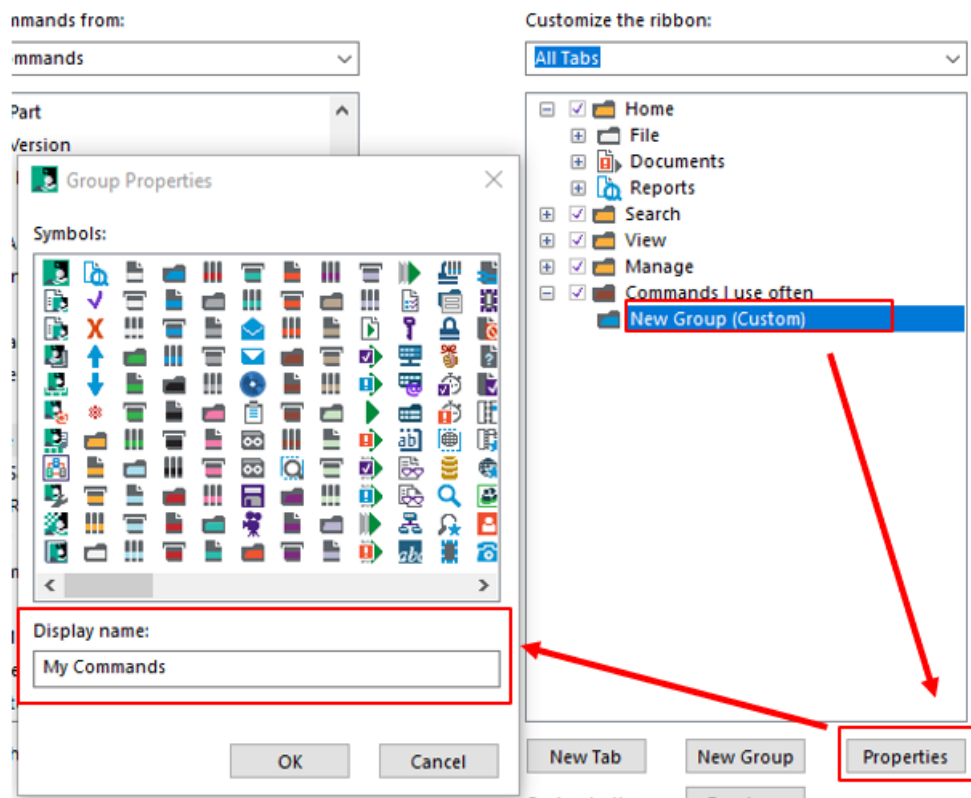
## EDRMS CONTENT MANAGER TIP 004

To add and customize a new tab and group:

1. Click **New Tab**. You will see **New Tab (Custom)** added to the list
2. Select the new tab then click **Rename**. Enter the name of the new tab

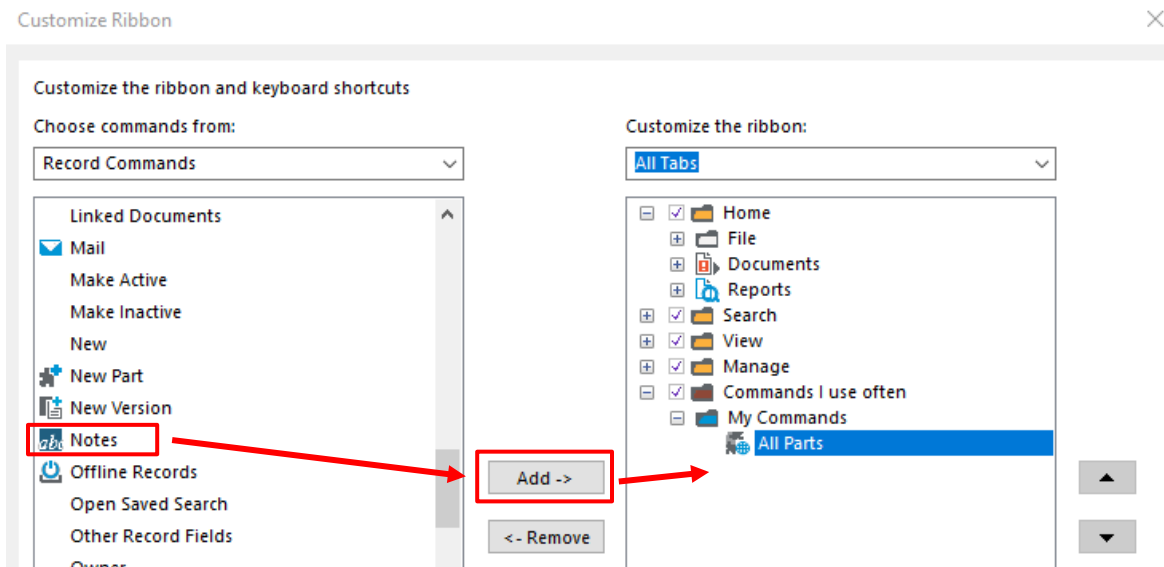


3. Click **OK**.
4. With the new tab selected then click **New Group**. This is where you will add commands that you want to use.
5. To customize the group name: Select the **New Group (custom)** group then click **Properties** and enter the name under **Display name**.
6. Click **OK**.



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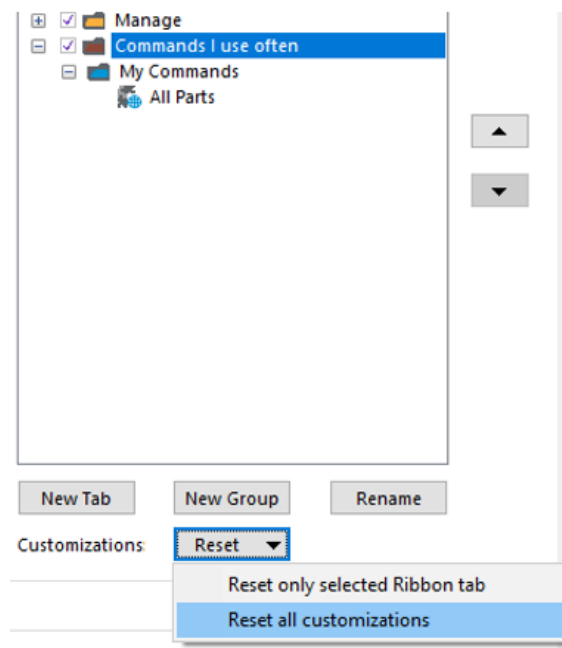
- Using the selection of commands from the **Choose commands from** drop down, choose the commands you need and click **Add** to bring into your new tab. To remove a command: Select it and click **Remove**.



**Note:** All commands are listed and can be added but only the ones you have permissions to use will work. If you can't find a specific one please contact [EDRMS.Help@gov.bc.ca](mailto:EDRMS.Help@gov.bc.ca).

To remove all customizations and reset to default settings:

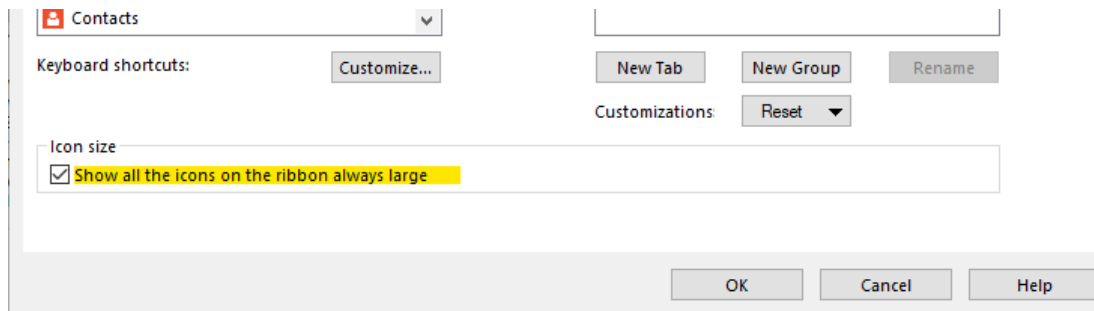
- Select **Reset** and choose **Reset all customizations** from the dropdown menu
- The customized tab you created is now deleted.



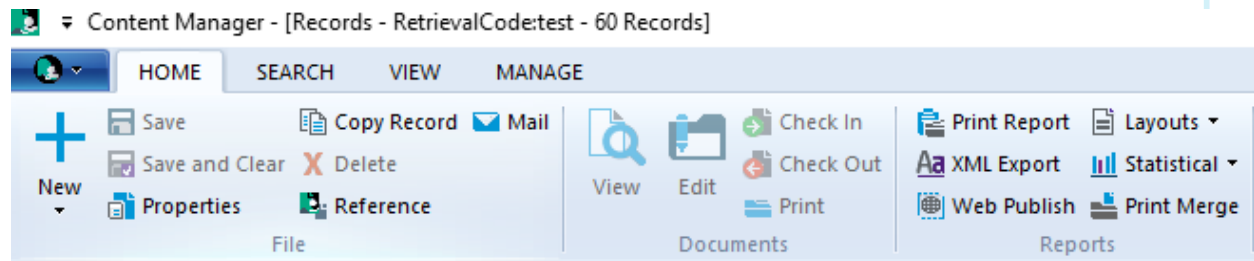
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### To change the Icon Size on the Ribbon:

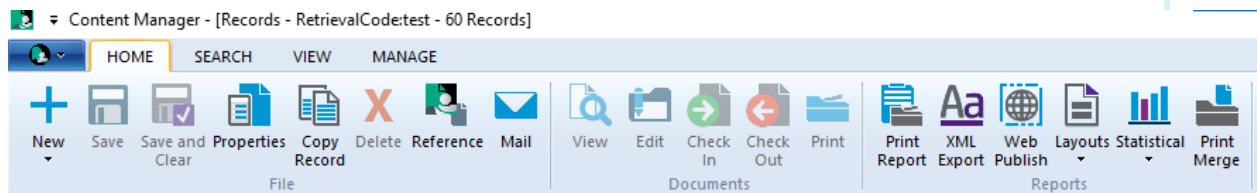
1. To change icon size, check **Show all the icons on the ribbon always large** at the bottom of the **Customize ribbon** pop up. This makes them more visible and easier to identify.



### Regular Icons



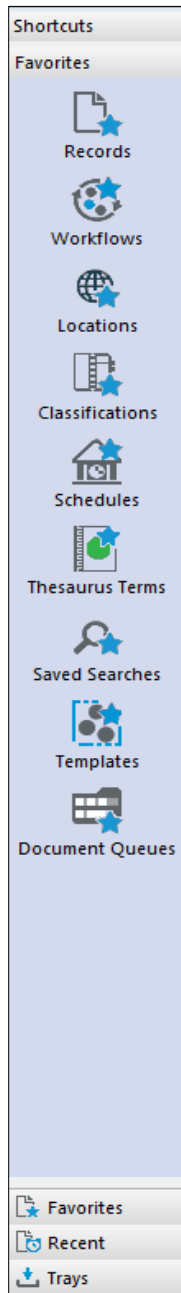
### Large Icons





## 4. Using and Customizing the Shortcut Bar

**NOTE:** The **Shortcuts** Bar, displayed down the left side of the EDRMS Content Manager. Provides quick access to records. Some are created automatically, such as **Recent Documents** and **Containers**. Others are user created, such as **Favourites** and **Trays**.



### Favorites:

**Records:** displays a list of your favorite records.

**Locations:** displays a list of your favorite locations.

**Classifications:** displays classifications that you have saved for ease of access.

**Saved Searches:** displays searches you have saved for further use.

### To add items to **Favorites**:

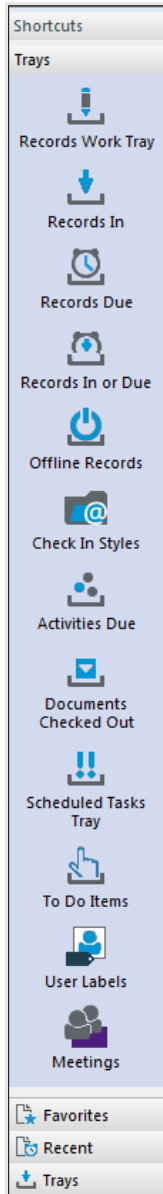
1. Tag the item (Record, Location or Classification).
  2. Click **F4**. The item will be added to your favorites.
- OR
3. Right-click → Send to → **Favorites**.

### To remove from **Favorites**:

1. Tag the record.
2. Right click → select **Clear**

**Workflows, Schedules, Thesaurus Terms, Templates** and **Document Queues** are not used.

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### Trays

**Records Work Tray:** use this tray to keep a list of records you manage for ongoing work.

You can add/remove records from the **Records Work Tray**:

To add records:

Tag the records → Click **F3**. The records will be added to your **Records Work Tray**.

To remove records:

Tag the records → Right click and select **Clear**.

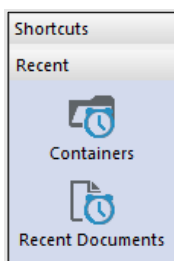
**Offline Records:** displays the documents you are currently working on, both drafts and those checked out.

**Check In Styles:** displays styles created in Outlook.

**Documents Checked Out:** displays only the documents you have checked out from EDRMS Content Manager.

**User Labels:** are personal shortcuts used to organize and group your records. Refer to **Tip 021: Creating User Labels**.

**Records due, Records In or Due, Activities Due, Scheduled Tasks Tray, To Do Items** and **Meetings** are not used.



### Shortcuts:

**Recent Containers:** displays the last 25 containers (folders or boxes) you have used.

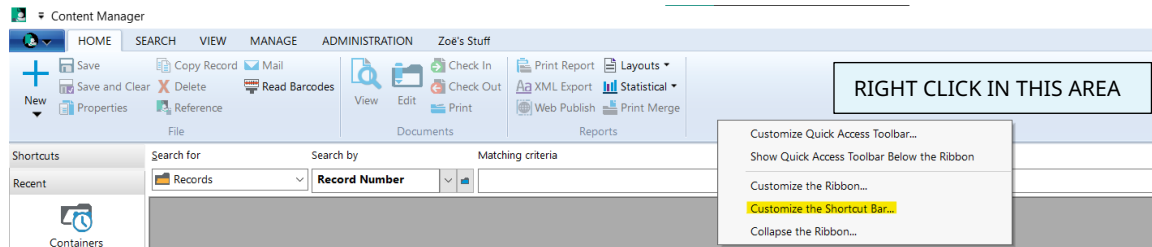
**Recent Documents:** displays the last 25 documents you have used.

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### Customizing Shortcuts:

You can remove the shortcuts that you don't use. To do this:

1. Right click in the Toolbar area and select **Customize the Shortcut Bar**.



2. On the **Customize the Shortcut Bar** popup, select the command that you want to remove under the **Favorites** and **Trays** Tabs then click **Remove**.

