

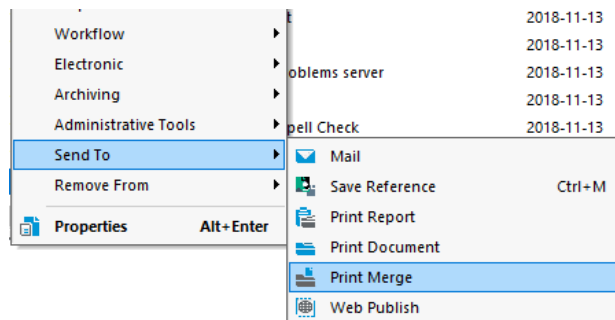


Print Merge - Exporting EDRMS Content Manager Data for use in Excel

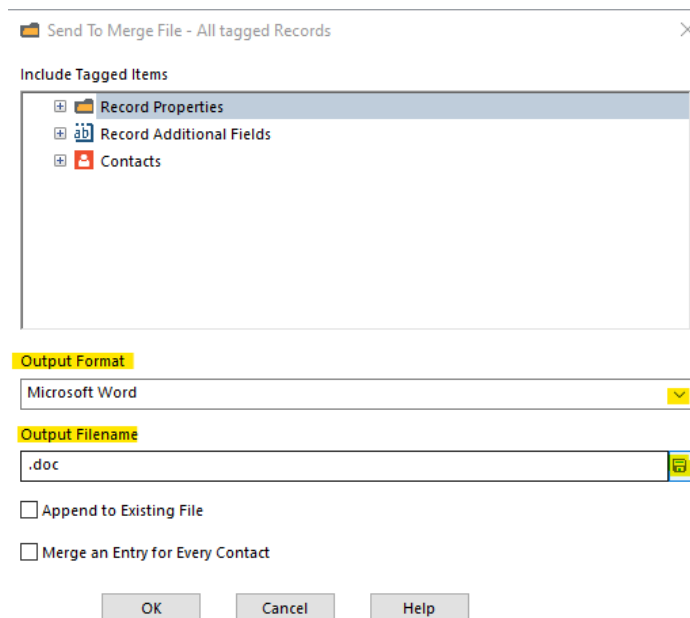
NOTE: Exporting EDRMS Content Manager data using **Print Merge** allows users to format, sort, and share data in an Excel spreadsheet. EDRMS Content Manager columns appear as Excel column headings. Can be used to create spreadsheets for Record or Location data.

Export EDRMS Content Manager using Print Merge:

1. Search for and tag all the records you want to export.
2. Right click on one of the tagged records and select **Send to** and then **Print Merge**.

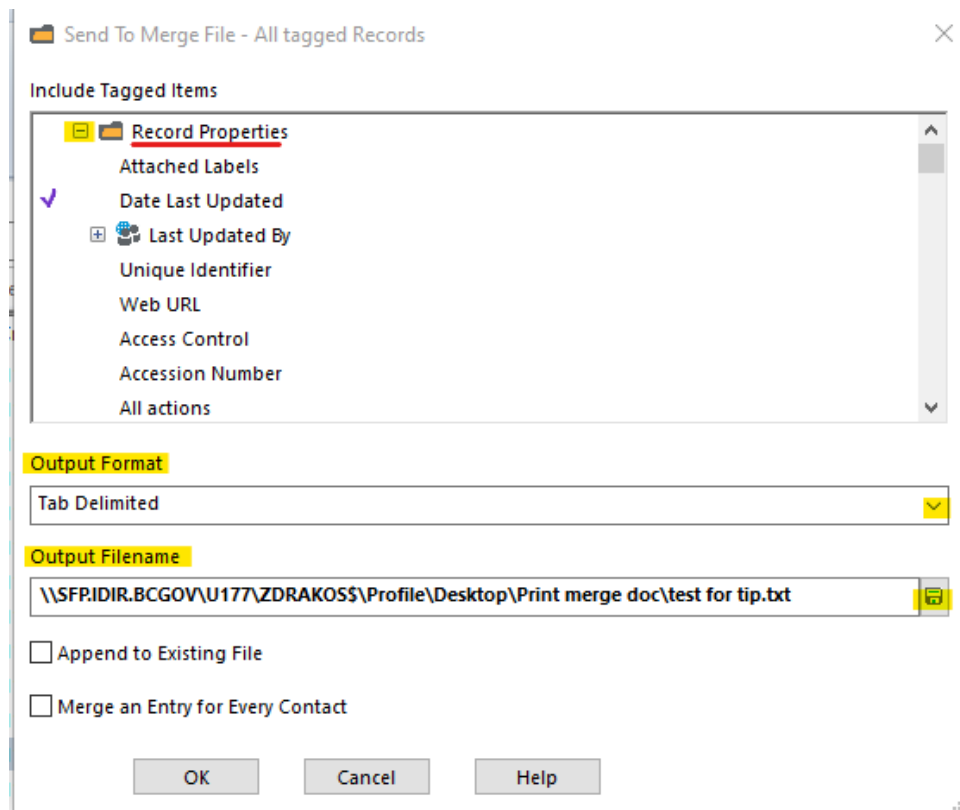


3. The first time you do a Print Merge your pop up will look like this:



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- To start you need to select for the criteria you want included in the spreadsheet. In the **Include Tagged Items** field click the **Plus** sign beside **Record Properties** to tag the items that you want to be included in your exported spreadsheet, such as **Date last updated**, **Record Number**, **Title (Free Text Part)** to name a few. Click the **Plus** sign beside **Record Additional Fields** to include items such as **SO Date** or **Content Start** or **End Date** etc. If you can't find the column or item you need, please reach out to EDRMS.Help@gov.bc.ca for assistance as some are harder to find than others.
- Next, change the **Output Format** to **Tab Delimited** using the drop down arrow.
- Click on the **disk icon** beside the **Output Filename** field to bring up the **Save As** dialogue box, navigate to your desktop or somewhere handy from where you will save it and give it a meaningful filename.



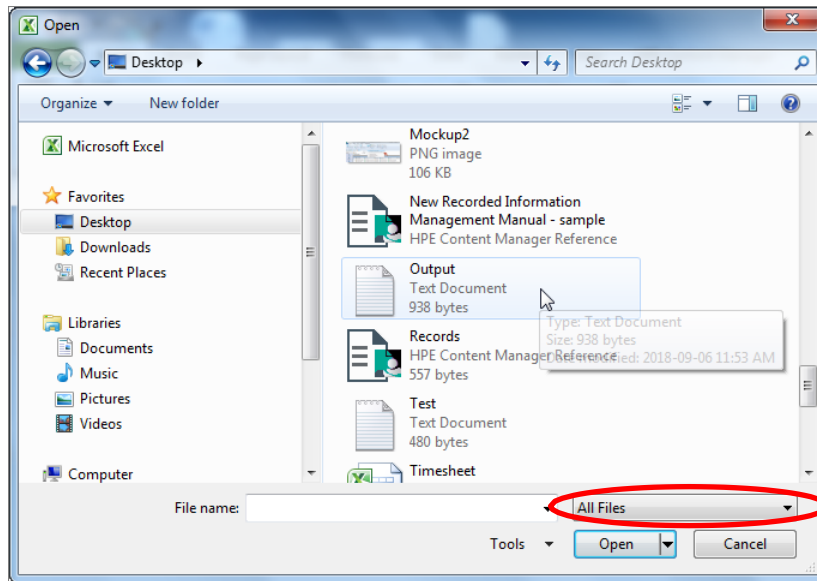
- Click **OK** and **Yes to All** on the **Send to Merge File – All tagged rows** pop up.

Note: The next time you do a **Print Merge**, EDRMS Content Manager will remember your selections and you don't have to add them again. You can just add additional items (columns) if required as it is easier to remove them from Excel after the fact if you don't need them.

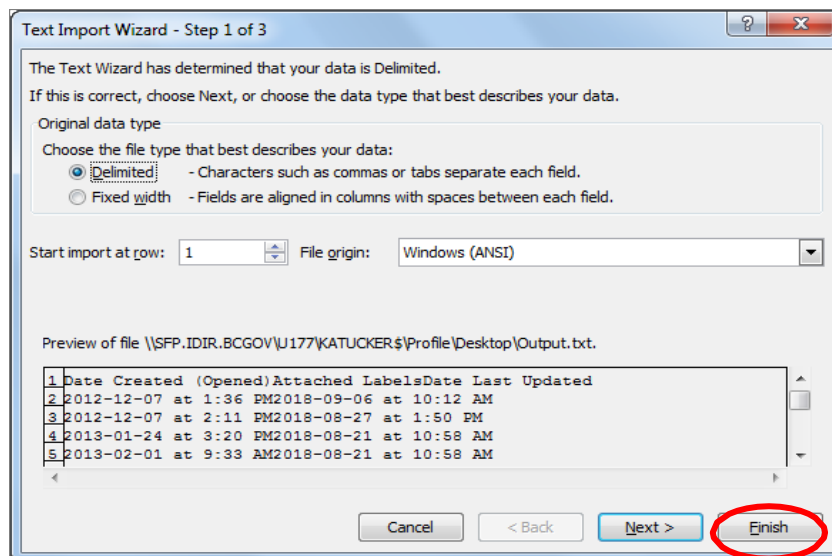
EDRMS CONTENT MANAGER TIP 021

Create Excel Spreadsheet from exported data:

1. Open Excel and navigate to your saved document. Go to the **File** tab, select **Open**, and navigate to the folder with the print merge document contained in it. Remember, it is a **.txt** file, not an **.xlsx** file you are looking for so on the Excel **Open** menu, you must select **All Files** or **Text Files** from the dropdown next to the **Filename** field. You will then be able to see and select your saved document.
2. Click **Open**.



3. On the **Text Import Wizard** popup, Click **Finish**.



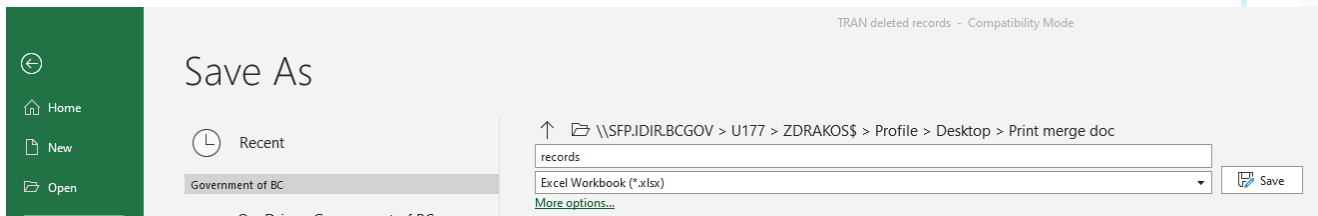
Note: An alternate way to open is to find the text document in **File Explorer** and right click, select **Open With**, and choose **Excel**. This way it opens directly into Excel without having to open Excel first.

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- The Excel spreadsheet will now be created and the items you selected are populated as Columns with the data from EDRMS Content Manager filled in. You can now format, sort and share the Excel Spreadsheet.

Record Type-Name	Record Number	Title (Free Text Part)	Retrieval Code	Date Registered	Date Created (Open)	Date Closed	SO Date	Creator-Name	Notes
CITZ OCIO CIRMO GOV ARCS-00285-20/0117995A	SUPP01 - CHECKER S W/H0157			2005-09-01	1995-05-23			Perron, Sylvain	"Wednesd
CITZ OCIO CIRMO GOV ARCS-00285-20/0125995A	SUPP01 - TOOL BOX SAI H0205			2005-09-01	1995-04-18			Perron, Sylvain	"Wednesd
CITZ OCIO CIRMO GOV ARCS-00285-20/0136195A	SUPP01 - MATERIALS AI H0310			2005-09-01	1995-08-30			Perron, Sylvain	"Wednesd
CITZ OCIO CIRMO GOV ARCS-00285-20/014495A	SUPP01 - BRIDGE TENDI H0022 - /O			2005-09-01	1995-08-03			Perron, Sylvain	"Wednesd
CITZ OCIO CIRMO GOV ARCS-00285-20/0152995A	SUPP01 - ENVELOPE - # H0567A			2005-09-01	1995-08-09			Perron, Sylvain	"Wednesd

- To save the spreadsheet as an Excel Spreadsheet, go to **File, Save As** and change the file type to **Excel Workbook (*.xlsx)**.



Note: For record searches if you include the **Record Number** column in your export, you can work with the data in the spreadsheet and then copy the record number from the spreadsheet and paste it into your EDRMS Content Manager **Records Work Tray** which will conveniently open those records in EDRMS Content Manager.