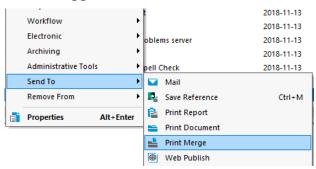
EDRMS CONTENT MANAGER TIP 021

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:

📹 Send To Merge File - All tagged Records	×
Include Tagged Items	
🗄 💼 Record Properties	
🗄 🛅 Record Additional Fields	
🗄 🦲 Contacts	
Output Format	
Microsoft Word	<mark>∽</mark>
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Append to Existing File	
_	
Merge an Entry for Every Contact	
OK Cancel Help	
OK Cancel Help	

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- 4. 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 then others.
- 5. Next, change the **Output Format** to **Tab Delimited** using the drop down arrow.
- 6. 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.

📹 Send To Merge File - All tagged Records	\times
Include Tagged Items	
😑 📹 Record Properties	^
Attached Labels	
✓ Date Last Updated	
🗄 🕞 Last Updated By	
Unique Identifier	
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\\SFP.IDIR.BCGOV\U177\ZDRAKOS\$\Profile\Desktop\Print merge doc\test for tip.txt	8
Append to Existing File	
Merge an Entry for Every Contact	
OK Cancel Help	.:

7. 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.

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Create Excel Spreadsheet from exported data:

- 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.

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

Text Import Wizard - Step 1 of 3	? X
The Text Wizard has determined that your data is Delimited. If this is correct, choose Next, or choose the data type that best describes your data. Original data type	
Choose the file type that best describes your data: Choose the file type that best describes your data: Choracters such as commas or tabs separate each field. Fixed width - Fields are aligned in columns with spaces between each field.	
Start import at row: 1 File origin: Windows (ANSI)	
Preview of file \\SFP.IDIR.BCGOV\U177\KATUCKER\$\Profile\Desktop\Output.txt.	
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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.

4. 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.

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5 Cl	TZ OCIO CIRMO GOV	ARCS-00285-20/014495A	SUPP01	- BRIDGE TEND	H0022 - /O	20	05-09-01	19	95-08-03			Perron, Sylvain	"Wednesda
6 CI	TZ OCIO CIRMO GOV	ARCS-00285-20/0152995A	SUPP01	- ENVELOPE - #	# H0567A	20	05-09-01	19	95-08-09			Perron, Sylvain	"Wednesda

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

) Home	Save As	TRAN deleted records - Compatibility Mode		
	New	L Recent	ISFP.IDIR.BCGOV > U177 > ZDRAKOS\$ > Profile > Desktop > Print merge doc records		
[▷ Open	Government of BC	Excel Workbook (*xlsx) More options	🖓 Save	
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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.