

Guide to EDRMS Content Manager Access Form

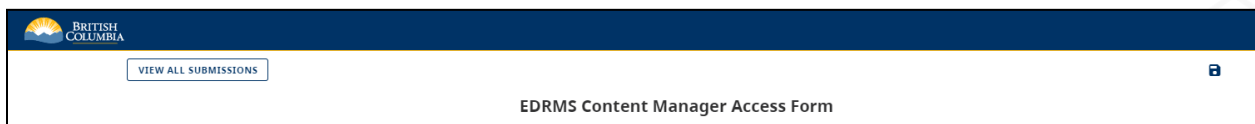
1. Instructions for submitting via the online form:

1. Go to the online form using the link: [EDRMS Content Manager Access Form](#)
 - a. Note: The form was designed in the Common Hosted Forms Service (CHEFS). The first time you use CHEFS, you will be prompted to login with your IDIR username and password. Depending on how frequently you access CHEFS forms, you may periodically be prompted to re-authenticate.
2. Fill out one form per request.
3. Click the Submit button when you have finished filling in the form and are ready to submit.
 - a. A successful submission is assigned a unique Confirmation ID. You can choose to receive an email confirmation of your submission.
4. If the EDRMS Help team requires any revisions to the form, you will receive an email notification.
5. When the EDRMS Help team has completed the request, you will receive an email notification.

2. Tips

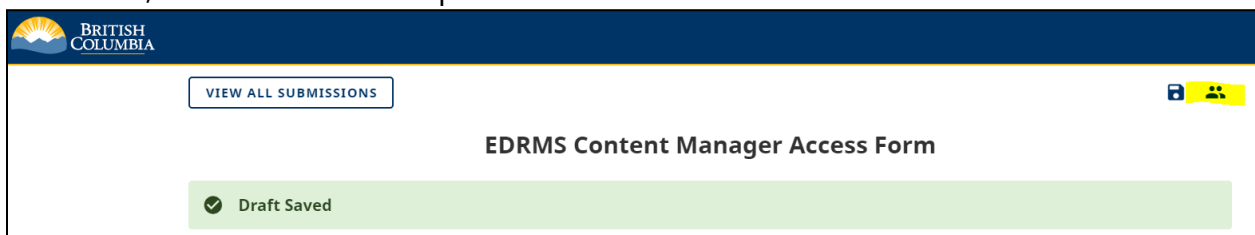
A. Save a Draft Form

You can save a draft of your form by clicking on the “Save as a draft” (disk) icon in the upper right corner of the form if you have only partially filled it in and want to come back to it later to finish and submit. Forms saved as drafts can also be shared with another team member for co-editing.



B. Share the form with other team members for co-editing.

After the form is saved as a draft the user can click on the “Manage Team Members” (people) icon to invite a team member to edit the form as well, if multiple editors are needed, or information is required from someone else.



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Note: The team member needs to have already logged in to CHEFS for you to find them in the selection list to add a team member. If they have not used CHEFS before, you will need to first send them the link to the [EDRMS Content Manager Access Form](#) and ask them to log-in once. Then you will be able to add their name as a team member and invite them to co-edit the submission.

Name	Username	Email	Actions
Rebecca Westle	RWESTLE	rebecca.westle@gov.bc.ca	⊖

C. View a list of your Submissions.

If you have submitted multiple forms, click the View all Submissions button to view a list of all your submissions and their statuses. Click on the eye icon under the Actions column to view the individual submission. To start a new form, click the + symbol.

[VIEW ALL SUBMISSIONS](#)

Confirmation Id	Status	Draft Last Edited	Submission Date	Actions
819F81EB	SUBMITTED		February 22, 2023, 2:52:53 pm	👁
A3EF9675	SUBMITTED		February 22, 2023, 12:46:26 pm	👁

D. Save form as PDF.

If you wish to save the submission as a PDF, you can do this through the browser printing method.

Use your browser’s “Save as PDF” print option for best results. You can get to this menu by clicking on the “File” menu and clicking “Print”. Then from the “Destination” drop-down menu, you can select “Save as PDF”.

You can also untick headers & footers & background graphics.

The image shows a screenshot of the EDRMS Content Manager Access Form on the left and its print options on the right. The form is titled "EDRMS Content Manager Access Form" and includes sections for "User Information", "Form Type", "Activate User", and "Access". The print options on the right include "Print", "Destination" (set to "Save as PDF"), "Pages" (set to "All"), "Pages per sheet" (set to "1"), "Margins" (set to "Default"), and "Options" (with "Headers and footers" and "Background graphics" unchecked). There are "Save" and "Cancel" buttons at the bottom right of the print options.

Print 2 pages

Destination Save as PDF

Pages All

Pages per sheet 1

Margins Default

Options

- Headers and footers
- Background graphics

Save **Cancel**