

Tip 002: Configuring EDRMS Content Manager

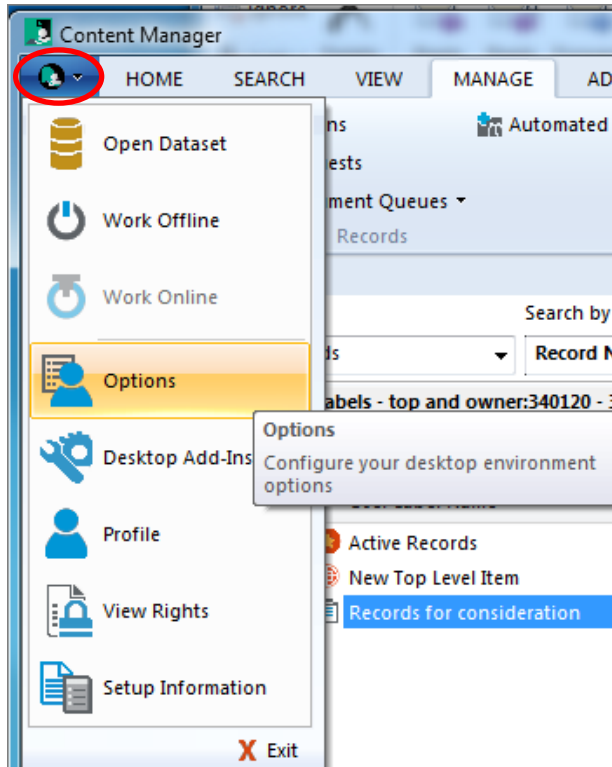
Primary Audience: Information Workers

Purpose: EDRMS Content Manager needs to be configured the first time you use it, or if you change your desktop computer or laptop, or your desktop computer or laptop has been re-imaged.

Refer to [Tip 003: Selecting EDRMS Content Manager Datasets](#) for information about how to select a dataset.

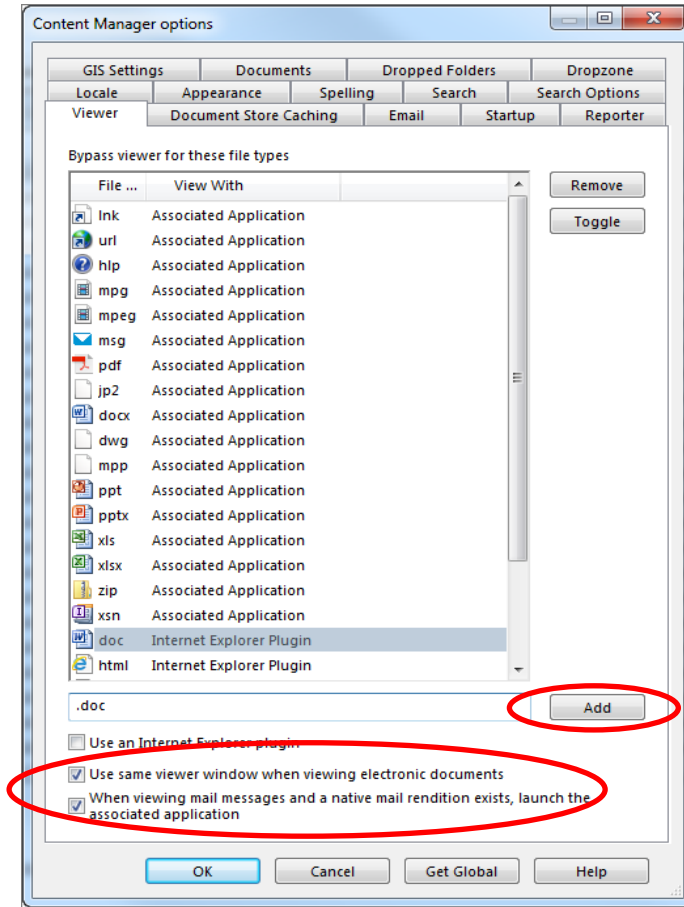
To set your Configuration Settings:

1. In EDRMS Content Manager, select **Options** from the **File** menu.



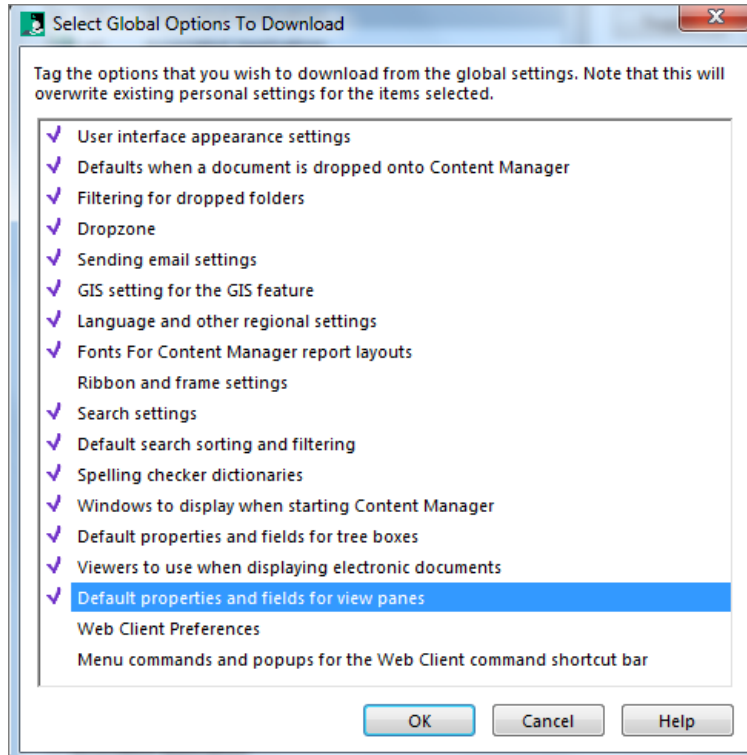
2. On the **Content Manager options** popup, select the **Viewer** tab:
 - a. Unless they are already listed, enter the following file type extensions in the field below: .doc, .docx, .dwg, .mpp, .ppt, .pptx, .xls, .xlsx, .zip, and .xsn (InfoPath forms). Click **Add**.
 - b. Ensure that the bottom two boxes: **Use same viewer window when viewing electronic documents**, and: **When viewing mail messages and a native mail rendition exists, launch the associated application** are also checked.

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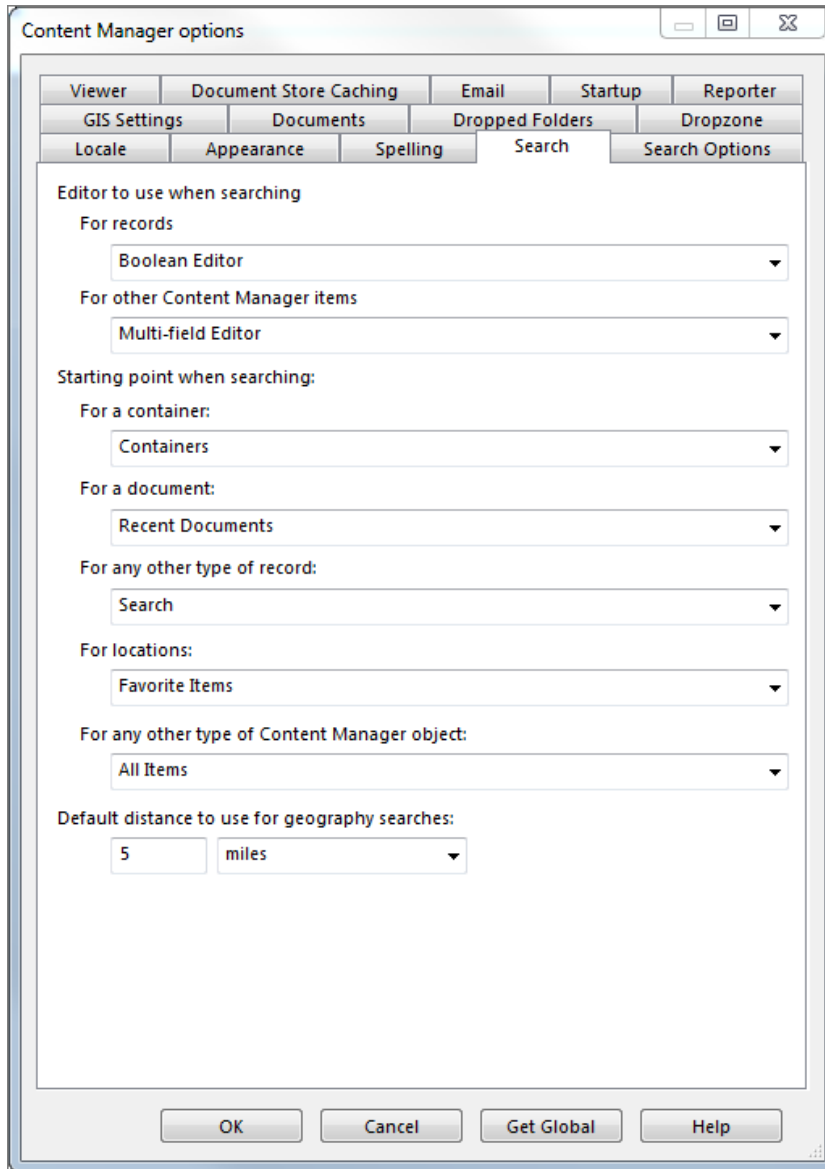
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- c. Click **Get Global**:
- i. On the **Select Global Options to Download** popup, select all options EXCEPT the following:
Ribbon and frame settings, **Web Client Preferences**, **Menu commands and popups for the Web Client command shortcut bar**.



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3. Select the **Search** tab:
 - a. On the Search tab, select **Search** from the **For any other type of record** dropdown.

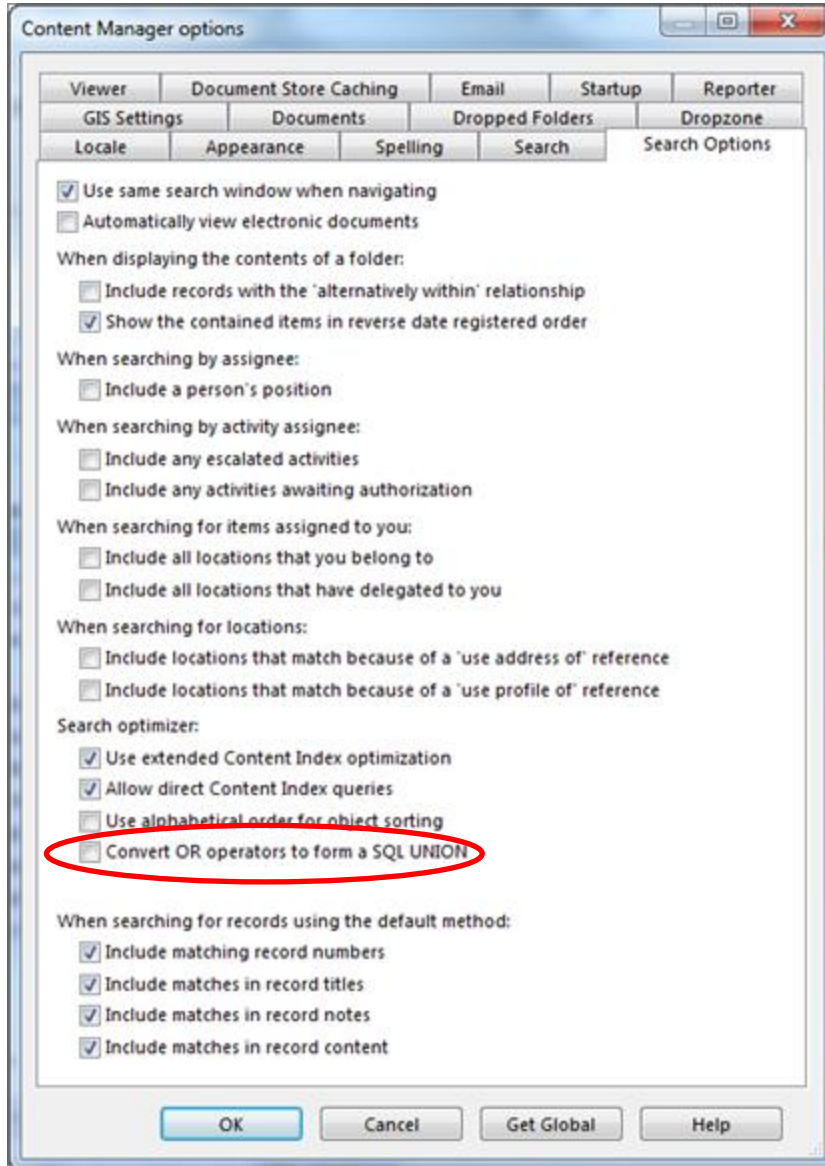


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4. Select the **Search Options** tab:

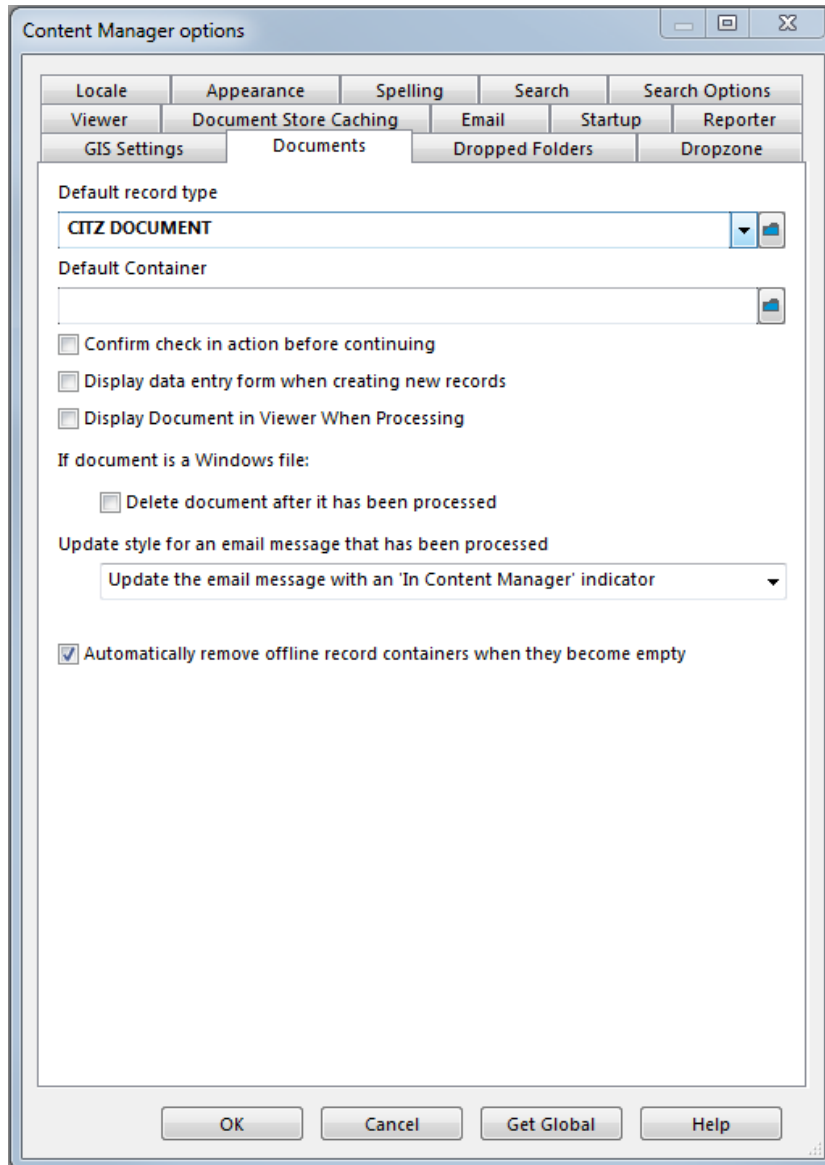
a. On the **Search Options** tab make sure the boxes are checked as shown below.

Uncheck the option: **Convert OR operators to form a SQL UNION** as this may cause your compound searches that use OR to time out.



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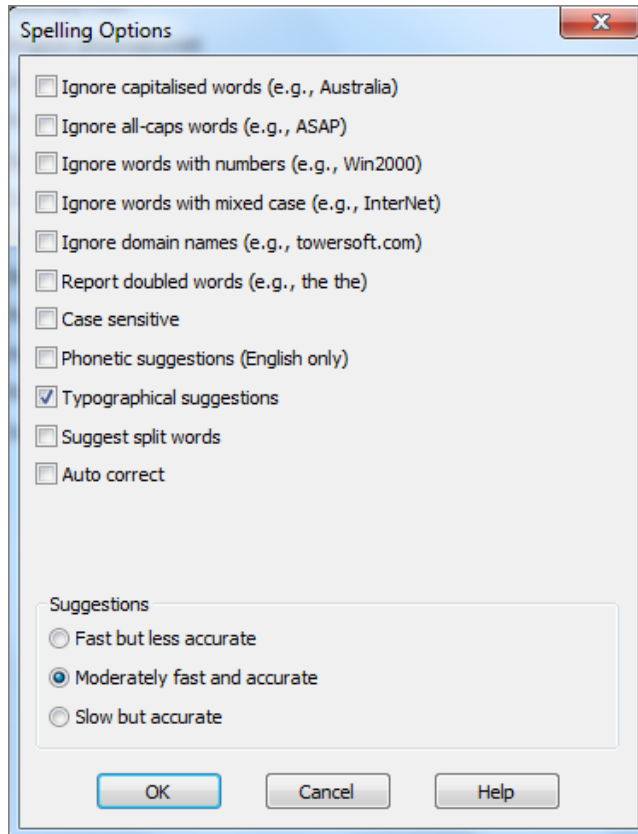
5. Select the **Documents** tab:
 - a. On the **Documents** Tab, make sure the setup is as shown below:



- b. Under **Default record type**, click the blue folder icon and select your ministry or organization's Default Record Type (if not already populated).
 - c. Under **Update style for an email message that has been processed**, choose **Update the email message with an In Content Manager indicator** from the dropdown.
 - d. Ensure that **Automatically remove offline record containers when they become empty** is checked.
6. Select the **Spelling** tab:
 - a. On the **Spelling** tab, click **Advanced** at the bottom of the popup:
 - i. On the **Spelling Options** popup, ensure that the first two boxes are NOT checked. This will allow you to search by combined case (upper and lower, such as: Coquihalla) and EDRMS Content Manager will not correct the word to be: coquihalla (lower case "c").

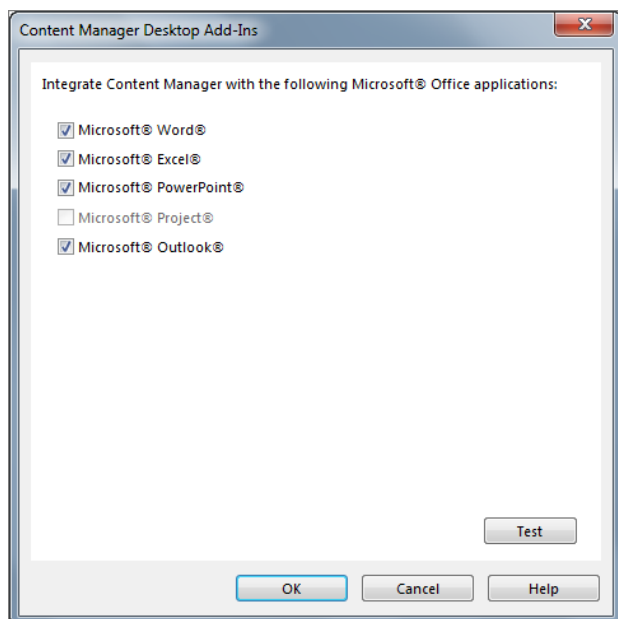
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- ii. Make sure the **Typographical suggestions** box is checked.
- iii. In the Suggestions section, make sure **Moderately fast and accurate** is selected.

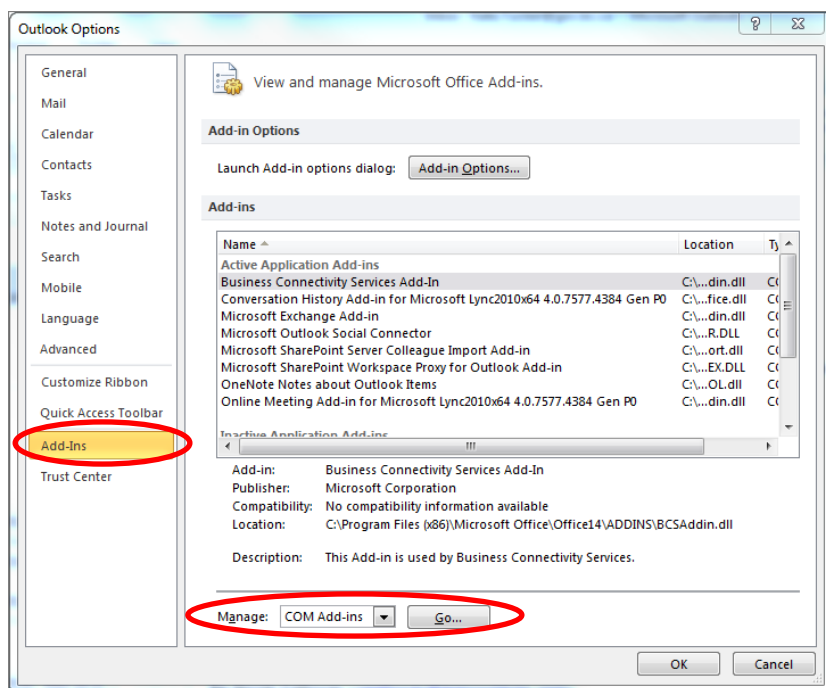


- iv. Click **OK** to return to the **Content Manager Options** popup.
 - b. Click **OK** to close the **Content Manager Options** popup and return to your home screen.
7. From the **File** menu, select **Desktop Add-Ins**:
- a. On the **Content Manager Desktop Add-ins** popup, check the boxes for Microsoft Word, Microsoft Excel, Microsoft PowerPoint, and Microsoft Outlook.
 - b. Click **OK**.

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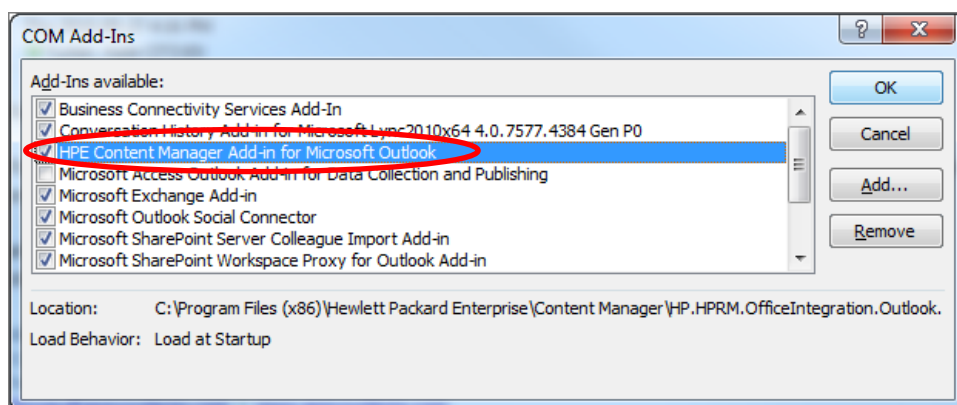


8. Click on your computer's **Start** button:
 - a. Select **All Programs**.
 - b. Scroll until you find **Microsoft Office**, and select it.
 - c. Select **Microsoft Outlook 2010 or Microsoft Outlook 2016**.
 - d. In Outlook, select **Options** from the **File** menu.
 - e. Select **Add-Ins** from the list of Options.
 - f. From the **Manage** dropdown, select **COM Add-Ins** and click **GO**.



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- g. On the **COM Add-Ins** popup, select **HPE Content Manager Add-in for Microsoft Outlook**.



9. Click **OK**. The **HPE Content Manager** tab will be displayed across the top of your Outlook screen.



- a. From the Outlook **File** menu, select **HPE Content Manager Options**.
- b. On the **HPE Content Manager Integration Options** popup:
- Check **Use Default Record Type**.
 - Select your default Record Type from the dropdown or click the blue folder icon to search for it.
 - Click **OK**.

