Tip 021: Checking Locations

Primary Audience: Information Workers with the responsibility of managing locations

Purpose: Information Workers with the responsibility of managing locations should review the EDRMS Content Manager settings for those in their organizational unit on a regular basis, to ensure that they have the appropriate access settings, and that those no longer with the organization are not able to log on.

To search for a Location:

1. From the Search tab, click Locations. From here, you can access a number of location searches; such as saved location searches, favourite locations, staff, project teams, workgroups, internal organizations, internal locations, etc.

2. Select Find Locations, Favorite Locations, All Locations, etc., as required.

3. From the Search tab of the Search for Locations popup, enter the search criteria and click OK:
4. Select the desired Location from the results list.
5. Click the plus sign (+) beside the Location to display a list of its members, with their Active? and Accepting Logins status.

6. Select a member, right click and select Properties.
7. On the Person popup:
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a. Click the **Associations** tab to see which locations this user is a Member Of, is Supervised By, Supervisor Of, Delegate of, Has Delegates, and is Administered By.

i. Click the plus sign (+) to expand a category such as **Member Of**.
8. To help manage memberships you can also add **All Memberships** to the Locations List Pane:
   - Right click, select **Customize**, and select **All Memberships** from Available Fields.
   - Click **OK**.
   - Copy and paste this information into a Word document, to facilitate comparison.

9. If as a result of this regular review you identify a required change, send an email with a EDRMS Content Manager reference for the relevant Location to **EDRMS HELP**, along with an explanation of the change required (such as employee retired, transferred, etc., on x date).

**Important:**

Users who have moved outside of government or to another organization that does not support EDRMS Content Manager should have the following information listed:

- Accepting Logins should be **No**
- Active? should be **Not Active**