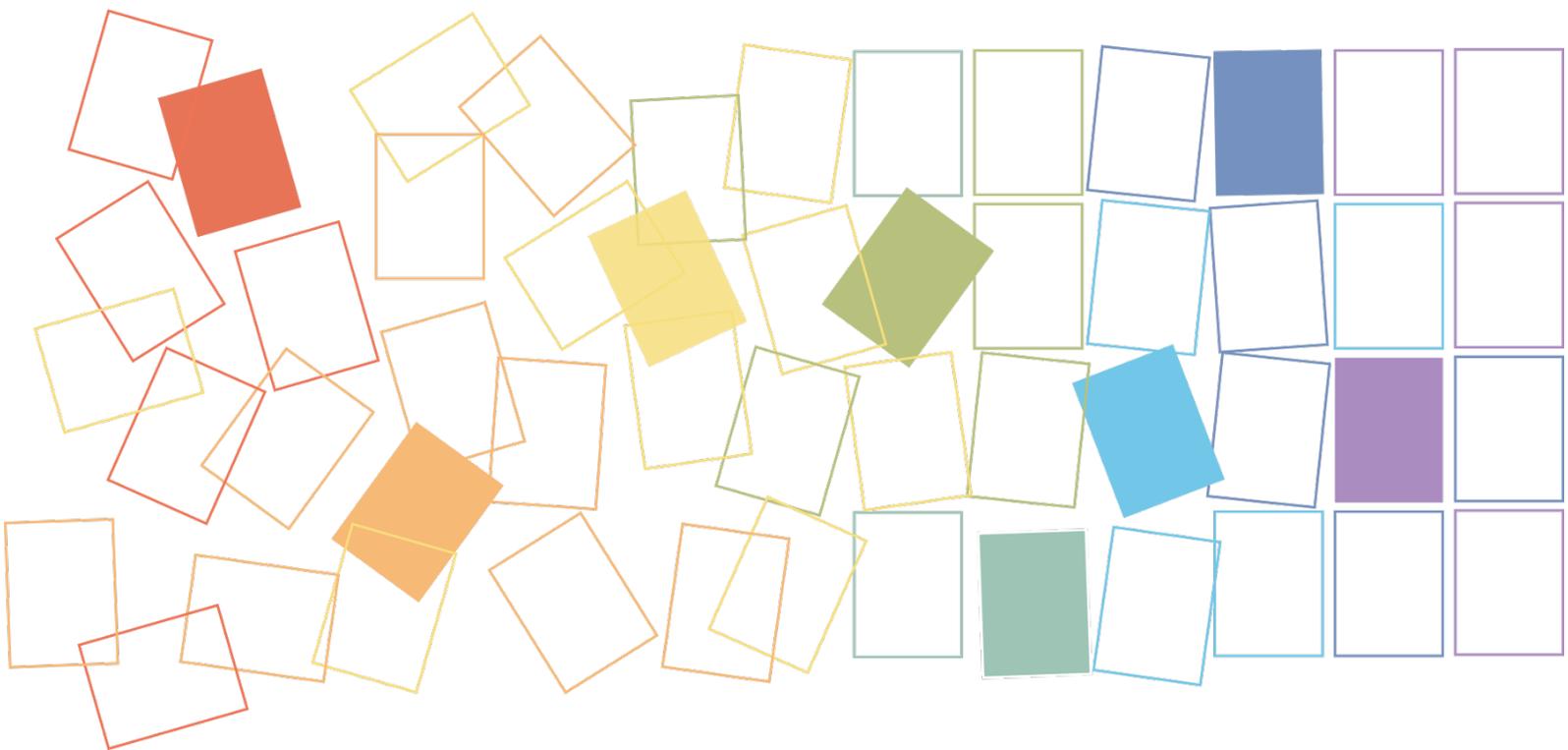


# EDRMS Content Manager What's New Guide

VERSION 1.0



Ministry of  
Citizens' Services

Government Records Service, Province of British Columbia

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## New Name, Updated Interface

While it may look like a big change, the new application, [EDRMS Content Manager](#), is actually not that different from TRIM. It is just the most recent version of the application you are already familiar with, from MicroFocus. Since we have missed many upgrades between TRIM and EDRMS Content Manager 9.2, you are just seeing all the changes at once.

What you will see are substantial upgrades and enhancements to the application's functionality and usability which will hopefully improve the way you do business and increase your day to day productivity.

## Access to Guides and Resources from within the Application

Users will now have access to guides and resources from within the application. These will vary depending on your role, but may include:

- [Tips](#) on a wide variety of EDRMS Content Manager business processes
- [Search Guide](#): how to use the EDRMS Content Manager search features to help you in your daily work.
- [Access Guide](#): how EDRMS Content Manager Access Controls protect records from unauthorized access, change and deletion.
- [Disposition Guide](#): how GRS manages records through the phases of the records lifecycle.
- [Fiscal Year/Calendar Year Rollover Guide](#): how this year's folders are used as a shortcut or a template to create next years' folders.
- [What's New Guide](#) (this document): what has changed between TRIM 7.2.1 and EDRMS Content Manager 9.2

To find the relevant guides and resources, use the Retrieval Code [HOWTO](#)

## New and Enhanced Functionality

### Customizable Ribbon

Instead of menus, EDRMS Content Manager has a [Ribbon](#) across the top of the screen that displays tabs with groupings of commands. Windows and Microsoft users will be familiar with this Ribbon-type interface.

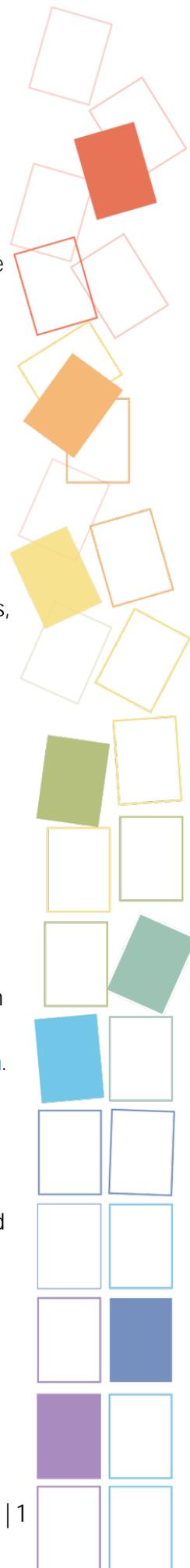
The default Ribbon tabs in EDRMS Content Manager are [Home](#), [Search](#), [View](#), [Manage](#), and [Administration](#). You can create, remove, rename, and reorder Ribbon tabs, groups and commands in the way that best suits the work that you do.

### Customizable Quick Access Toolbar

You can also customize the EDRMS Content Manager [Quick Access Toolbar](#) to give you quick access to commonly used functions, such as: Tag All, Untag All, Internal Locations, Close All, Reference, Container, and Notes. You can add or remove functions depending on which ones you use most, and you can set the [Quick Access Toolbar](#) to be displayed [above](#) or [below](#) the Ribbon.

### Enhanced Search

Search functionality in EDRMS Content Manager has been enhanced to provide new methods of searching, and better ways of organizing your search results.



## Search Editors and Filters

The [Search for Records](#) popup now offers three search editors:

- ◆ Boolean (recommended as default)
- ◆ Multi-field
- ◆ String (advanced search)

For each search editor there are now two filter options:

- ◆ For [Boolean](#) and [Multi-field](#) searches you can choose the [Multi-field](#) or [String filter](#). The [Multi-field](#) filter is the default.
- ◆ For String searches you can choose the [Multi-field](#) or [String](#) filter. The [String](#) filter is the default.

### Boolean Search

Boolean searches work by combining keywords with the operators [AND](#), [OR](#) and [NOT](#) to produce more relevant results. [Brackets \(...\)](#) are also used to show the order in which search criteria are to be addressed.

The [AND](#) operator is used to add another search criterion to an existing one. Example: dogs [AND](#) cats returns all records containing both the text [dogs AND](#) the text [cats](#).

The [OR](#) operator is used to perform an either/or search. Example: dogs [OR](#) cats returns all records that meet both criteria [either](#) containing the text [dogs OR](#) the text [cats](#).

The [NOT](#) operator is used in conjunction with [AND](#) to include records that meet the previous criteria but exclude those that meet the current criteria. Example: dogs [AND](#) cats [NOT](#) fish returns all records contain the text [dogs](#) as well as [cats](#), but that do not contain the text [fish](#).

[Brackets \(...\)](#) are used to group sets of search methods by putting them in brackets. Bracketed methods will be processed first, followed by any preceding and following search methods.

Example: (dogs [OR](#) cats) [AND](#) fish:

- ◆ First, search for records that contain either the text [dogs OR cats](#) or both
- ◆ In those search results, search for records that also contain the text [fish](#).

### Multi-field Search

[Multi-field](#) is a new search editor in EDRMS Content Manager. It allows you to combine a number of fields to search for EDRMS Content Manager Records, Locations and Classifications. The fields in the [Search for](#) popup and the tabs for further search criteria will differ depending on the item you are searching for.

Your search will return items that match [ALL](#) the criteria you have entered, like in a Boolean [AND](#) search.

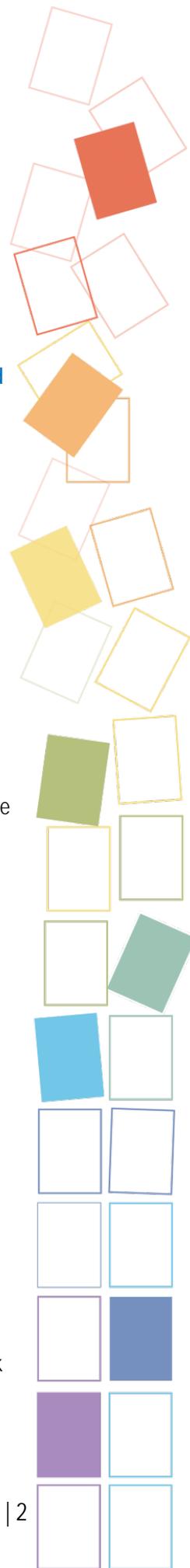
### String Search

The string-based search editor allows you to combine large numbers of criteria, using advanced filter and sort options.

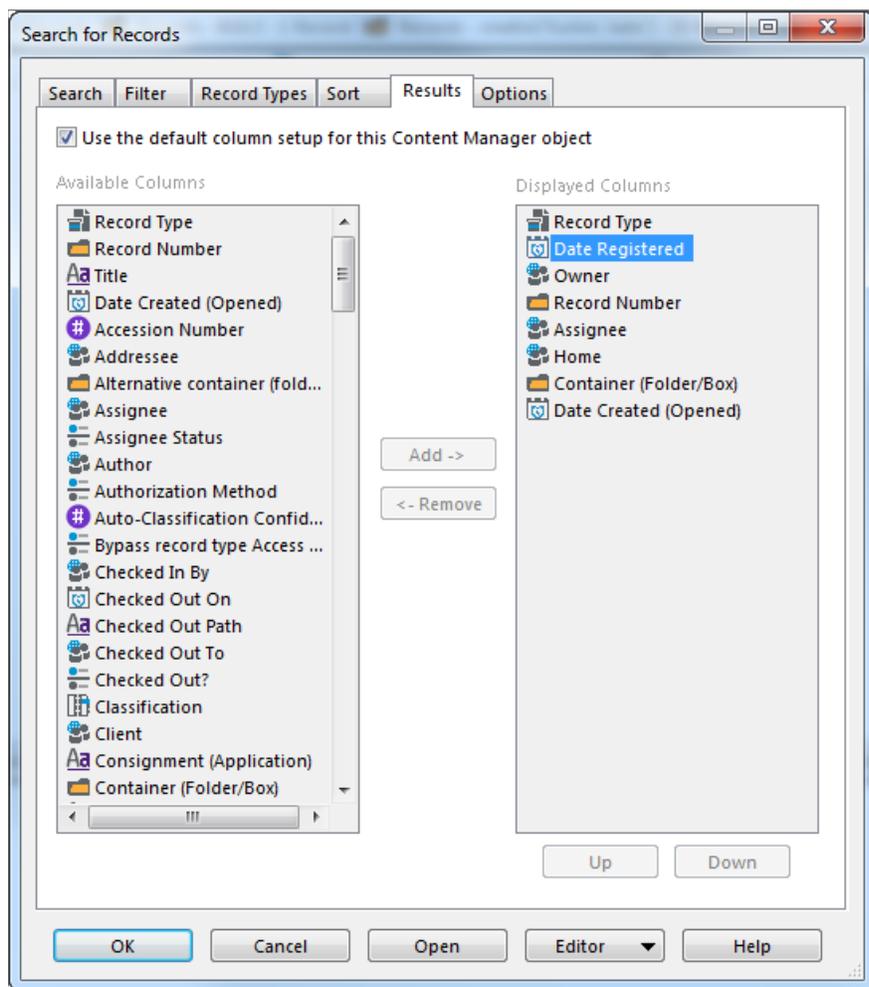
## Customizable Results Tab

The [Results](#) tab on the [Search for Records](#) popup is new to EDRMS Content Manager. It allows you to configure your search results in a way that best suits your business needs.

If you don't change the column setup for your search results, the default column setup will be applied. Uncheck [Use the default column setup for this Content Manager object](#) if you want to customize the column setup for your search results.



Select columns from the [Available Columns](#) list and click [Add](#) to add them to the [Displayed Columns](#) list. Remove columns by clicking [Remove](#), or move columns up and down the list by clicking [Up](#) and [Down](#).



### Check In Styles

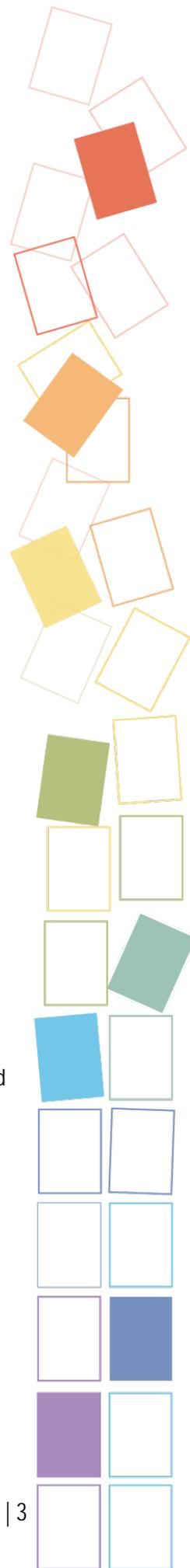
EDRMS Content Manager has a new automated email Check In function through the [Check In Styles](#) feature. Check In Styles are defined behaviours for email and email attachments that allow you to define links between EDRMS Content Manager containers (folders or boxes) and Outlook email folders. This means that emails filed in these Outlook folders will be checked in as defined by the Check In Style, including a destination folder in EDRMS Content Manager.

Since End Users cannot create folders in EDRMS Content Manager, they will have to ask an Information Worker to create them so that they can link to Outlook for Check In Styles.

### Dropzone

Dropzone is a method to quickly check in files from your computer to EDRMS Content Manager by dragging and dropping them into a small interface window.

When the option [Minimize EDRMS Content Manager to Dropzone view](#) is selected and you minimise your EDRMS Content Manager window, it turns into a small opaque window, your Dropzone. You can then use this window to drag records into it, which checks them in to EDRMS Content Manager. To return to the EDRMS Content Manager window, maximize the Dropzone window.



Before you do this, you will need to set up destination folders and define check in values in EDRMS Content Manager to receive the files. It is important to understand that by dropping files into Dropzone you are effectively creating new EDRMS Content Manager records.

### **Last Updated By Column**

A new column, **Last Updated By**, displays the last user who updated the properties of a record. It can be added to both the **List Pane** and the **View Pane**.

### **End Users Can Modify Document Titles**

EDRMS Content Manager End Users now have the ability to modify the title of a document. Changes to document titles will be captured in the audit events. The former TRIM custom End User role in has been eliminated.

### **New Notes Properties**

When adding a note to a record in EDRMS Content Manager, the User Stamp will be most effective. Notes can no longer be modified or deleted; add a detailed specific note to capture any changes.

### **New Email Subject Line**

Since the name of the application has changed from TRIM to EDRMS Content Manager, the subject line of emails received from Outlook will be different too.

Formerly the subject line for emails was: **HP TRIM: XXX**

Now the subject line for emails will be: **EDRMS CM: XXX**

### **Default Disposition of Boxes is Semi-Active**

When creating a new onsite or offsite box in EDRMS Content Manager, the box's default disposition will now be **Semi-Active**. Information Workers were previously able to update this field, however they can no longer do this. If you need the disposition of a box changed to **Active**, please contact EDRMS HELP.

### **Microsoft Integration**

Integration with Microsoft products will be familiar but different. You will no longer be able to save directly from Word, Excel, or PPT into EDRMS Content Manager. Instead, you will need to save your document to your LAN drive or desktop, for example, and then move it into EDRMS Content Manager.

### **Colorbar**

EDRMS HELP will no longer provide support for **ColorBar**, a Barcoding function. If you use it in your business, you will need to get support from the Information Management Branch of your ministry.

### **Windows 10/Office 2016 Upgrade**

Because this upgrade from TRIM to EDRMS Content Manager overlaps with the government-wide Windows 10/Office 2016 upgrade, many of our EDRMS Content Manager Resources will continue to refer to both environments.

