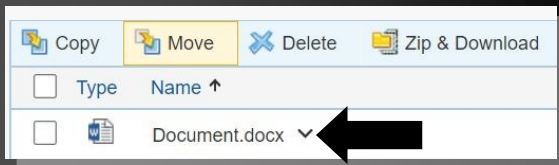


## EDMS Functions



The EDMS Functions available to each user are based on the user's role and permissions. Simply by clicking the Functions dropdown menu for an item, the user will see the list of functions that are available.

### Common user Functions include:

- **Download** — Saves a copy of the document to a local location.
- **Open** — Opens the document in a Read-Only view if office editor is installed.
- **Add Version** — Adds a new version to an existing document.
- **Make Shortcut** — Creates a shortcut, or "pointer", to content located elsewhere in EDMS.
- **Reserve** — Puts the document "on hold", so other users cannot make changes to it.
- **Unreserve** — Removes the "hold" from a reserved document, so other users may make changes to it.
- **Delete** — Removes an item from EDMS.
- **Add to Favorites** — Adds the item to the user's Favorites, providing quick access to frequently used items.
- **Properties** — Displays data about an item, such as:
  - ◇ **General** — The item's creator, owner, creation date & time, and modification date and time.
  - ◇ **Audit** — A history of actions taken on an item.
  - ◇ **Versions** — A history of versions of the item.

## Electronic Document Management System (EDMS)

The Electronic Document Management System (EDMS) is part of the eIT PMO Medical Research Information Technology System (MeRITS) Sub-portfolio and is focused on the reduction, and possibly the elimination, of paper-based systems for regulated and non-regulated documents. This FDA-compliant system enables users to collaborate within and across organizations and agencies streamlining processes and mitigating risks through the use of a controlled access information environment. EDMS is certified to meet U.S. Army and DHA Information Assurance requirements.



Protect, Project, Sustain

eIT Project Management Office  
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504 Scott Street  
Building 568  
Fort Detrick, MD 21702-5012

### Helpdesk Mailbox:

[usarmy.detrick.medcom-usamrmdc.mbx.eit-pmo-helpdesk@health.mil](mailto:usarmy.detrick.medcom-usamrmdc.mbx.eit-pmo-helpdesk@health.mil)

### eIT PMO Website:

<https://eitpmo.health.mil>



Enterprise Information Technology

## Getting Started with EDMS



Application features at your fingertips!



eIT PMO EDMS - Content Server  
Revised January 2023

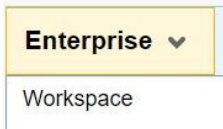
## Logging into EDMS

### To log into EDMS:

1. Enter the EDMS URL in the address bar of your internet browser (recommend Edge / Chrome)  
<https://edms.health.mil>  
(Tip: For easy access in the future, bookmark the URL as a "Favorite" in your internet browser.)
2. Log in with your CAC or DoD-approved External Certificate and PIN. Select Authentication Cert.

## EDMS Workspaces

EDMS workspaces store and organize information according to their intended audience. Each workspace has unique tools and characteristics.



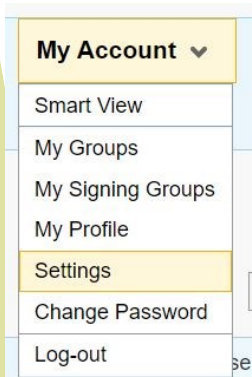
- **Personal "My" Workspace** — A private area assigned to each user to manage and store frequently used information.
- **Enterprise Workspace** — The area used to store, organize, and work with documents. Within the Enterprise Workspace, organizational folders are used to collaborate based upon user permission while the "Public" folder is intended for use by ALL users.

## EDMS Settings

### EDMS settings include:

**General tab** — Choose your personal preferences for the start page, view, navigation style, and new or modified indicator icon durations.

\* EDMS also allows you to configure email notifications so you can determine what you want to know about and how frequently by visiting your Personal Notifications menu.



## EDMS Permissions

Permissions control access to everything in EDMS. Permissions define the information a user sees, where a user can add or modify content, and what functions a user can perform.

## EDMS Favorites

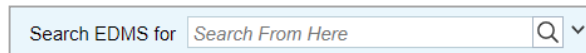
You can easily access frequently used items by adding them as *Favorites*. When you add an item as a Favorite, you are creating a marker to the item, to be stored on your "Favorites" page. That link to the document or folder will not be broken if it is moved or renamed.

### To add an item to your Favorites:

- Navigate to the item you would like to add, click the item's Function drop-down menu, and choose *Add to Favorites*.

## EDMS Search

The EDMS Search Bar provides a way to find items through a full search of the entire document.



- Perform a basic search by entering a term or descriptive data about an item in the search field, then click on the magnifying glass button.
- Select the drop-down menu to the right of the Search Bar & select different attributes to search by i.e. document type, last modified, etc. There is also an advanced searching option.
- The Search Results page lists all the items you have permission to see. You can modify your search with the *Refine Your Search* button.

### Did you know EDMS has several efficiency tools ready to use:

- ◇ Enterprise Document Routing Workflow
- ◇ Enterprise Bulk Load
- ◇ Training and Certification Management
- ◇ Records Management

## Add New Items in EDMS

To add an item in EDMS, you must have permissions to do so in the given location.

1. Navigate to the location (destination) where you want to add the item.
2. Click the appropriate button for adding a document or folder. The "Add" dialog box will appear.
3. If adding a folder, enter a folder name and click *Add*. If adding a document, *Browse* to the document (source), double click it or highlight it and click *Open*. Enter the document name and click *Add*.

## Reserve/Unreserve Items & Add New Versions in EDMS

### To reserve an item (document):

1. Navigate to the item, click the item's *Functions* dropdown menu and select *Reserve*.
2. (Optional) Once at the Reserve page, if you need to make edits/changes to an item, click the *Download* button to download the most recent version of the item to your computer.
3. Click the *Submit* button to reserve the item.

### To unreserve an item:

1. Navigate to the item that you reserved, click the item's *Functions* drop-down menu and select *Unreserve*.
2. If you have made edits/changes to an item, check the *Add New Version* button, click *Browse* to locate and add the new version of the item. Click the *Submit* button.
3. The edited/changed version of the item is now in EDMS. All previous versions of the item are still available in the order in which they were added and can be viewed by clicking the *Functions* menu, *Properties*, and *Versions*.