EDRMS TRIM Tip Updating Owners

Primary Audience: Information Workers

If you need to update the owner of a folder due to reorganization, transfer, or some other reason you must ensure the record type is also updated, otherwise this may create problems with who can access, or manage records.
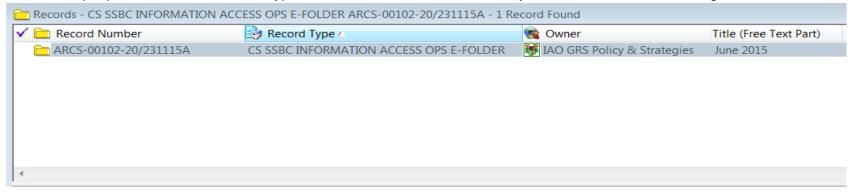
IW's can update the owner but **NOT** the record type. When updating the owner of an E-Folder it is important to tag the folder and all the <u>documents contained</u> otherwise the document owners will not be updated.

✓ 📁 Record Number	📄 Record Type	🔖 Owner	Title (Free Text Part)
REMS-12400-25/2514A	CS SSBC INFORMATION ACCESS OPS P-FOLDER	CS SSBC Information Access Operations	IOC - BC Public Servi...
✓ REMS-12400-25/24915A	CS SSBC INFORMATION ACCESS OPS E-FOLDER	IAO GRS Policy & Strategies	IOC - International Tr...
✓ D12131615A	CS DOCUMENT	IAO GRS Policy & Strategies	MIT Org Chart Updat...
✓ D11169615A	CS DOCUMENT	IAO GRS Policy & Strategies	FW: IOC changes for ...

Once you have updated the owner send an email to EDRMS.HELP@gov.bc.ca and ask them to update the record type or if you prefer ask them to update both the owner and record type.

To check for mismatches between the record type and owner ensure the **record type** and **owner** columns are displayed in the list pane.

In the example provided here the record type and owner are a mismatch as they do not relate to the same organization.

📁 Records - CS SSBC INFORMATION ACCESS OPS E-FOLDER ARCS-00102-20/231115A - 1 Record Found			
✓ 📁 Record Number	📄 Record Type	🔖 Owner	Title (Free Text Part)
ARCS-00102-20/231115A	CS SSBC INFORMATION ACCESS OPS E-FOLDER	IAO GRS Policy & Strategies	June 2015

In the example provided here the record type and owner match as they relate to the same organization.

NOTE: When displaying the record type column make sure 'display text' checked