

Updating the Record Type, Owner, Home, and Assignee

Updates to the owner, home or assignee of a record are often due to organizational moves or transfer of records to another branch or organization. To avoid mismatched information or access issues ensure that when you update the owner location the record type is updated to match.

NOTES:

Information Workers can update the Owner, Home & Assignee, but **Not** Record Types.

Home of offsite boxes is the storage facility.

A folder must first be permanently removed from an offsite accession before the owner and record type can be updated.

Assignee is an individual or the home. It can also show if the record is Missing.

Owner and record type changes cannot be made to previously offsite accessions.

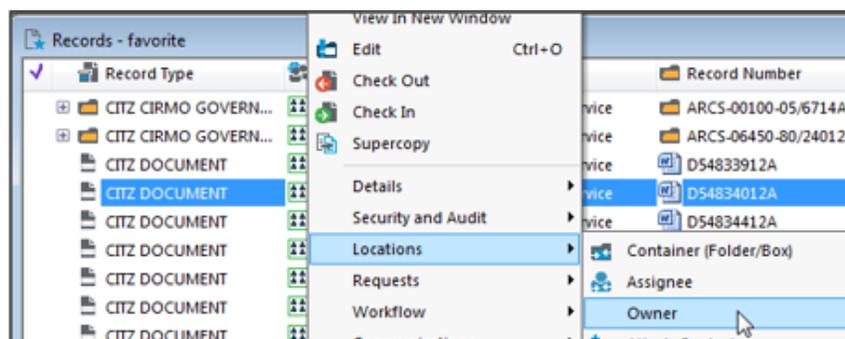
Please email your records team at GRS@gov.bc.ca if you need to update the owner of an offsite accession.

To update a Record Type:

1. Update Owner, Home & Assignee (see below)
2. Create a reference (refer to [TIP 008 Creating a Reference & Sending a Document via Email](#)), send via email to EDRMS.Help@gov.bc.ca requesting the record type be updated to match the new owner location.

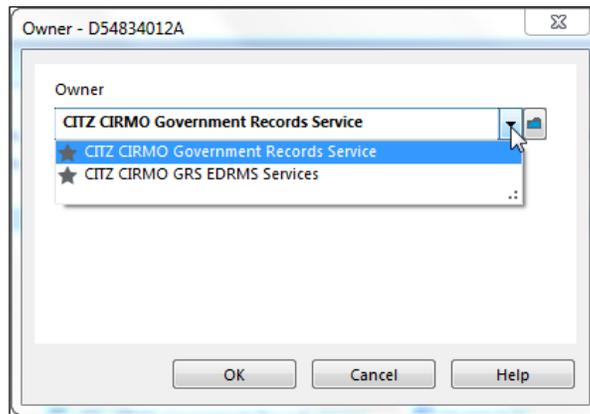
To update Owner:

1. Locate the record(s) to update.
2. Right click on the record, **Locations, Owner**.



EDRMS CONTENT MANAGER TIP 010

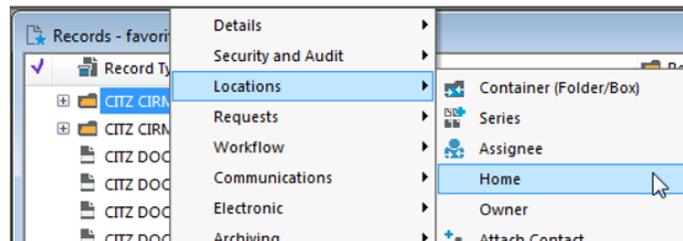
3. On the **Owner** popup, enter new owner, or select from dropdown of previously used locations, or click blue **KwikSelect** folder icon to search.



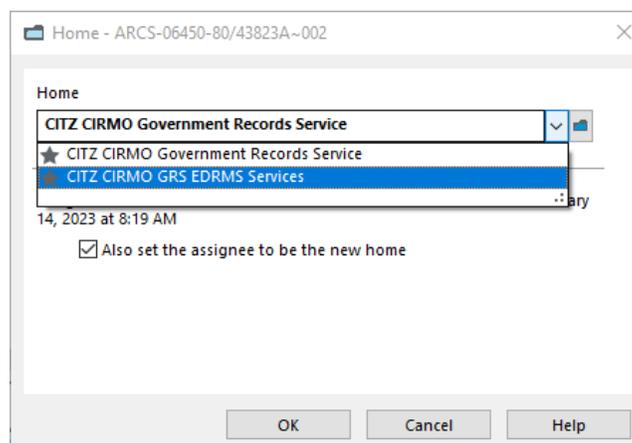
4. Click **OK**.

To update Home and Assignee:

1. Locate the record(s) to update.
2. Right click, **Locations, Home**.



3. On the **Home** popup:
4. Enter the new home, select one from the dropdown, or click the blue **Kwikselect** folder icon to search for the location.
5. Check Box: Check the box "**also set the Assignee to be the new Home**". Don't click the box if only the home is being updated.
6. Click **OK**.

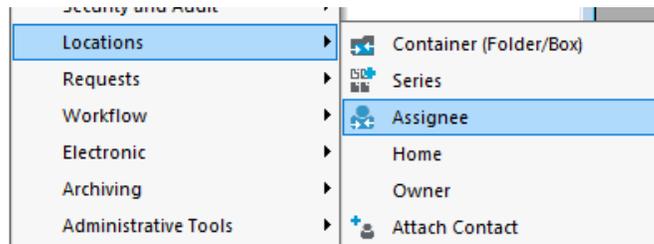


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To update the assignee:

Assignee is usually the same as the Home Location. Update it to indicate the current location of the physical folder, if it is assigned to someone or to another work location or is missing. Always set it back to home when file is returned or found.

1. Locate the record(s) to update.
2. Right click, Locations, Assignee.



3. On the **Set Assignee** popup choose from options below and click **OK**.
 - **Set to Location** – type in the name of the new location or click blue KwikSelect folder to search for location
 - **Set to Home** – you can change the Assignee Location to match the Home Location. The Home location populates in the field.
 - **Set as Missing** – marks a records' Assignee location as Missing. Always add notes to a record marked as missing indicating steps taken to locate missing file. (Right-click file, Details, Notes, Add note)

A screenshot of the 'Set Assignee' popup window. The window title is 'Set Assignee - ARCS-00292-45/155610A'. It has four radio button options: 'Set to location', 'Set to home', 'Set to the earliest requester', and 'Set as 'Missing''. The 'Set to home' option is selected. The 'Set to location' option has a dropdown menu showing 'CITZ Location CIRMO IAO Health/Education Team'. The 'Set to home' option has a text field with 'CITZ OCIO CIRMO Government Records Service'. The 'Set to the earliest requester' option has a text field and a 'Due for return by' field. The 'Set as 'Missing'' option has an 'Effective from' field with '2023-06-23' and '7:24:07 AM'. At the bottom are 'OK', 'Cancel', and 'Help' buttons.