

## 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.

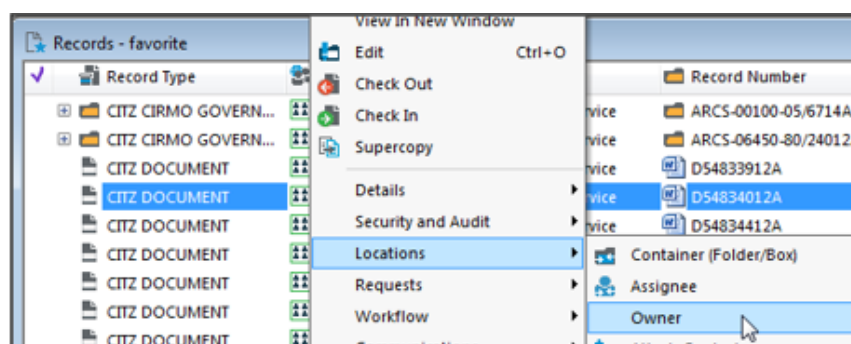
Please email your records team at [GRS@gov.bc.ca](mailto:GRS@gov.bc.ca) if you need to update the owner of an offsite accession.

### 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](mailto:EDRMS.Help@gov.bc.ca) requesting the record type be updated to match the new owner location.

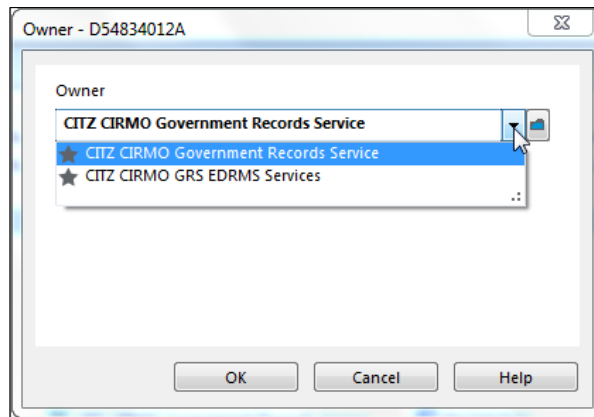
### To update Owner:

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



## EDRMS CONTENT MANAGER TIP 010

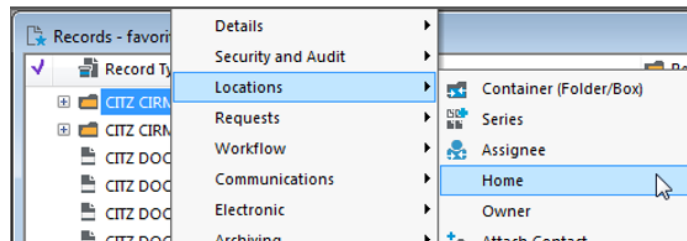
3. On the **Owner** popup, enter new owner, or select from dropdown of previously used locations, or click blue **KwikSelect** folder icon to search.



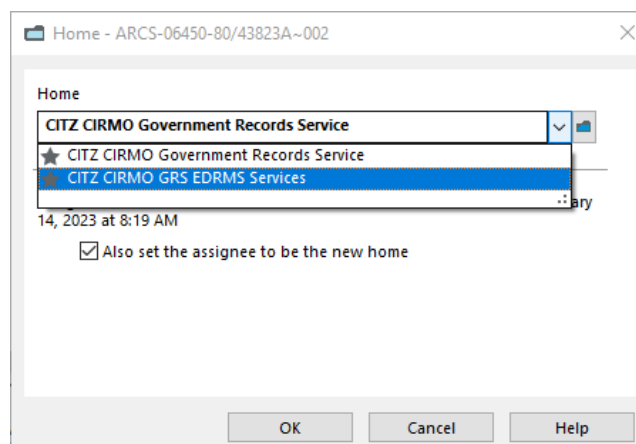
4. Click **OK**.

### 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**.

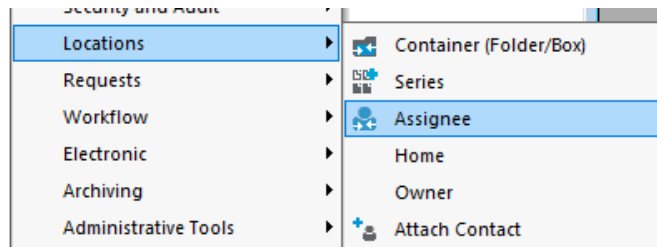


## EDRMS CONTENT MANAGER TIP 010

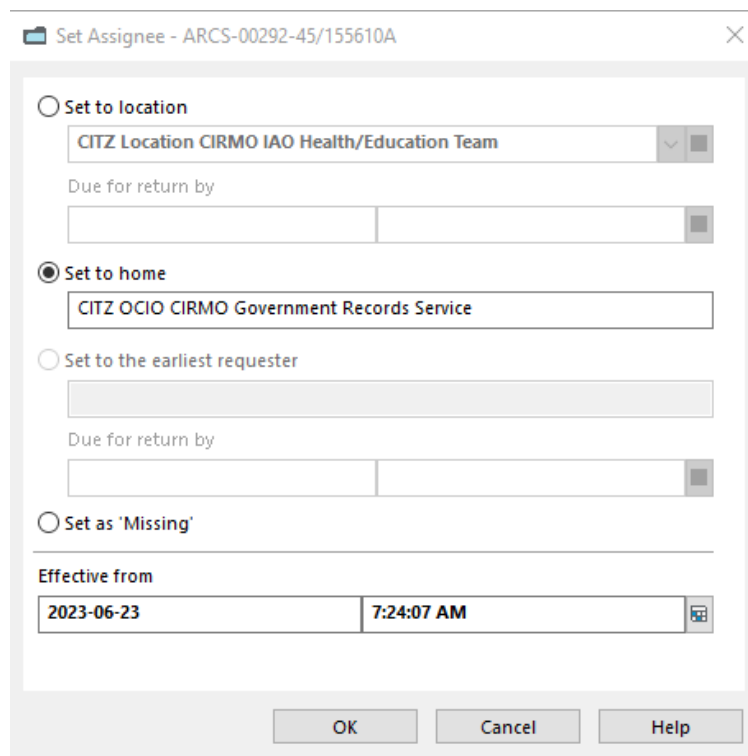
### To update the assignee:

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 a 'Set Assignee' popup window. The title bar says 'Set Assignee - ARCS-00292-45/155610A'. There are four radio button options: 'Set to location', 'Set to home' (which is selected), 'Set to the earliest requester', and 'Set as 'Missing''. Under 'Set to location', there is a text field containing 'CITZ Location CIRMO IAO Health/Education Team' and a 'Due for return by' date field. Under 'Set to home', there is a text field containing 'CITZ OCIO CIRMO Government Records Service'. Under 'Set to the earliest requester', there is a text field and a 'Due for return by' date field. At the bottom, there is an 'Effective from' section with a date field containing '2023-06-23' and a time field containing '7:24:07 AM'. At the very bottom are three buttons: 'OK', 'Cancel', and 'Help'.