

Moving Documents to Another Folder

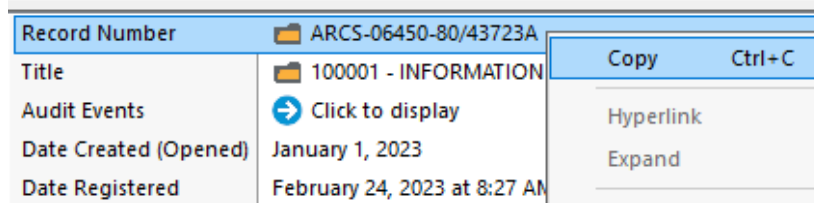
Notes:

End Users and **Information Workers** can move documents to another folder. You must have access to the **Record Type** and be part of the **Owner** location to move the document into that folder.

If the folder you are moving the document into has a different **Owner** location, please ensure you update the **Owner** of the document to match the folder owner location to avoid a mismatch.

Quick Method:

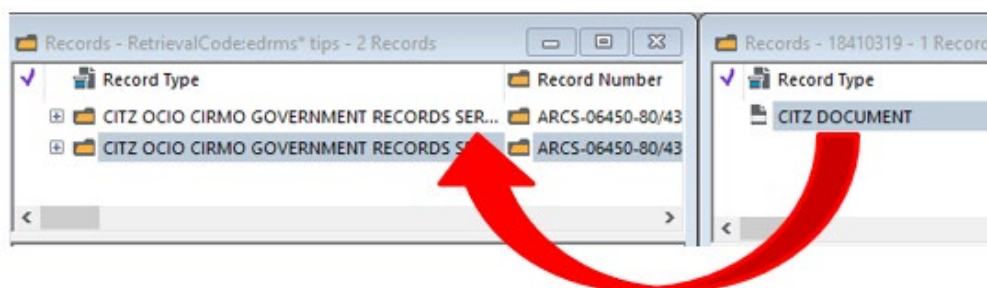
1. Navigate to the folder where you want to move the record(s).
2. Copy its **record number** from the **View** pane.



3. Select the document(s) you want to move (tag multiple documents if required).
4. Right click and select **Locations**.
5. On the **Record Container** popup, paste the copied record number in the **Set container (folder/box) To** field.
6. Click **OK**.

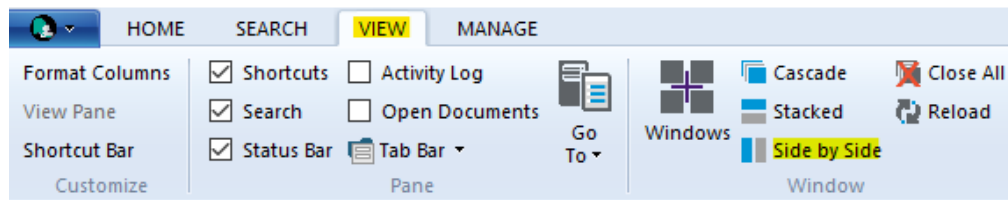
Drag & Drop method:

Users can drag a document from one folder to another if they have two windows open next to each other.



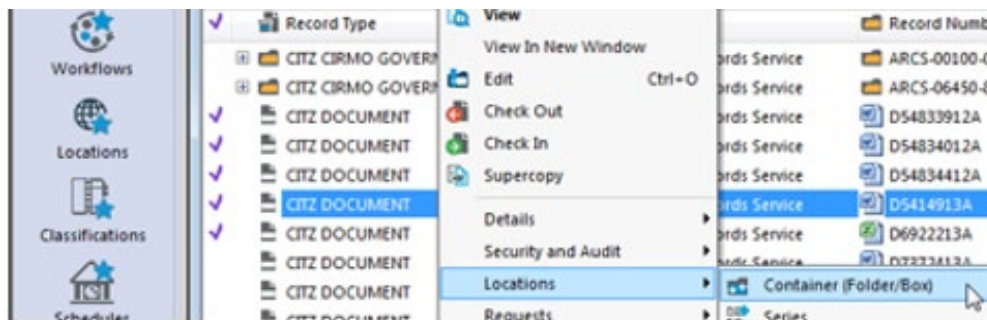
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With 2 tabs open, go to the **View** tab and select **Side by Side** to change the view as shown above

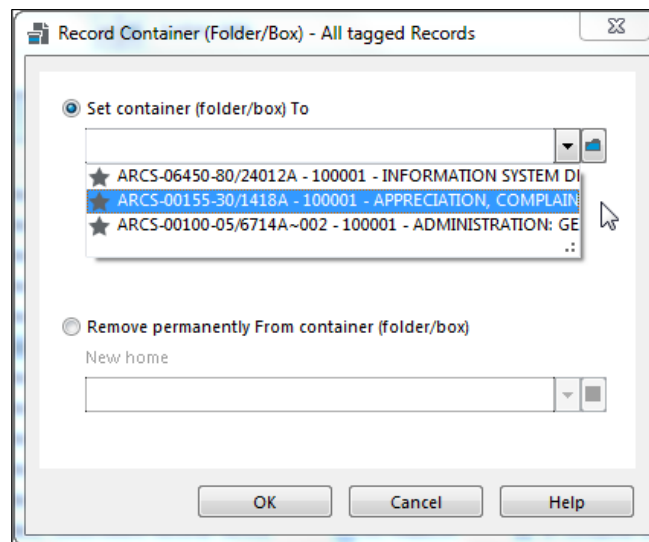


Moving a Document:

1. Find the document(s) you want to move. **Tag** all the documents to move.
2. Right click on tagged document(s), select **Locations**, then **Container (Folder/Box)**.



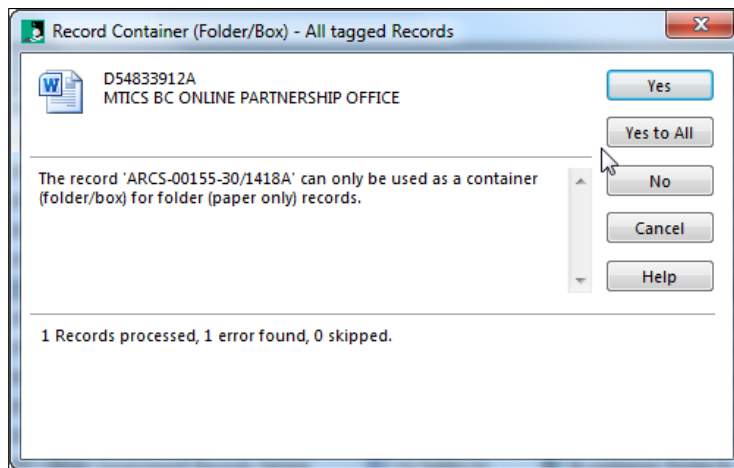
3. On the **Record Container (Folder/Box) - All tagged Records** popup, **Set container To:**
 - A. Click the blue folder icon (**Kwikselect**) to search for a folder. **OR**
 - B. Click the dropdown to display recently used folders and select one.



- C. Click **OK**.

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- D. On the Record Container (Folder/Box) – All tagged Records popup, click Yes to All.



- E. The documents will be moved to the new folder.

If you are not able to move the document, please contact EDRMS.help@gov.bc.ca send a reference to both the folder you are moving the document to and the document and if an error message came up provide it for further assistance.