Tip 018: Updating Record Details and Locations

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Primary Audience: Information Workers

Purpose: You can use the Find Records and Tag functions to update the metadata or locations for a record or a group of records. Right click options will differ depending on your user role and the item you are updating.

Refer to Tip 026: Updating Record Owner, Home and Assignee.

To update the details of a record or multiple records:

1. Search for and tag the records that you want to update. What you are able to see will depend on your role.
2. Right click in the List Pane and choose Details.
3. Select the field you want to update. Fields include:
   - Notes
   - Dates
   - Classification
   - Other Record Fields
4. Click **OK**.

5. **Additional Fields**: the fields on this popup can be modified:
   a. Select a field, such as **Date Requested**, and click **Modify**.
b. Enter a new value and click **OK**.

**Note:** Contact **EDRMS HELP** to do a search and replace within the **Title Free Text Part** or **Notes** fields.

6. Click **OK**.

To update the **Locations** of a record or multiple records (you can only perform this function on top level Record Types, such as Folders and Boxes):

1. Search for and tag the records that you want to update. What you are able to see will depend on your role.
2. Right click and choose **Locations**.
3. Select the field you want to update. Fields include:
   - **Container**
4. Click **OK**.

5. On the **All Tagged Records** popup, click **Yes to All**.