Tip 026:
Updating Owner, Home and Assignee

Primary Audience: Information Workers

Purpose: Updates to the owner, home or assignee of a record are often required due to organizational moves, transfers of records responsibility to another organization, and government reorganization. In these situations the record type must be changed so that the records can be accessed and managed by the new record owner. Overlooking this step will create problems related to accessing or managing the records.

Information Workers can update the owner, home and assignee of a record but not the record type. Record type changes can only be done by EDRMS Help.

The following standards apply to EDRMS Content Manager box and folder locations:

- The default owner of offsite boxes is your branch or business unit
- The default owner of active and semi-active folders and onsite boxes is the branch or business unit
- The home of offsite boxes is the storage facility
- The assignee is an individual or the home. It can also show if the record is Missing.

To help manage updates, add the Record Type and Owner columns to the List Pane. Refer to Tip 029: Formatting and Customizing Columns. Record Type and Owner must relate to the same organization.

Example 1: the record type and owner are mismatched, as they do not relate to the same organization:
Example 2: the owner and record type are accurate and reflect the same organization:

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>FLNR CSNR INFORMATIONMGMT (FL...</td>
<td>FLNR CSNR Information Mgmt Branch (FLNR) (HIS)</td>
</tr>
<tr>
<td>FLNR TOPFN BCTS BABINE P-FOLDER</td>
<td>FLNR TOPFN BCTS Babine</td>
</tr>
<tr>
<td>D - 100 MILE HOUSE E- FOLDER (DMH)</td>
<td>FLNR ROSA Cariboo 100 Mile District (DMH)</td>
</tr>
<tr>
<td>D - 100 MILE HOUSE E- FOLDER (DMH)</td>
<td>FLNR ROSA Cariboo 100 Mile District (DMH)</td>
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<td>FLNR ROSA Cariboo 100 Mile District (DMH)</td>
</tr>
</tbody>
</table>

To update Owner:
1. Locate the record you want to update.
2. Right click on it and select Locations and then Owner.
3. On the Owner popup, enter the new owner, select one from the dropdown, or click the blue folder icon to search for one.

Note: When updating the owner of an e-folder it is important to tag the folder AND all the documents contained in it, otherwise the document owners will not be updated.
4. Click the **OK** button.

To update Home and Assignee:

1. Locate the item you want to update.
2. Right click on it, select **Locations** and then **Home**.

3. On the **Home** popup:
a. Enter the new home, select one from the dropdown, or click the blue folder icon to search for one.
b. The record assignee is displayed below the home location.
c. Make sure the Also set the assignee to be the new Home box is checked.

4. Click OK.

To update Record Type:

1. Once you have updated the owner, create a reference and send it in an email to EDRMS HELP asking for the record type to be updated. Refer to Tip 017: Creating a Reference for One or More Records.