



Uploading New Document Versions

Documents in Claromentis can be updated by users with the correct [permissions](#), and new versions replace the old rather than uploading them as a completely new item.

A user needs at least 'View' and 'Edit & approve' permissions to the file to be able to upload a new version of it.

We would recommend additionally giving these users the 'edit metadata' [permission](#), so they can edit the properties of it too, e.g. Title, description, tags, etc.

There are two options for upload - using the check out/in button or renewing the file.

Confirm how your site is configured

There is a document configuration option in Admin > Documents > Configuration that determines what happens when a user clicks on a file in Documents.

The choice is either to open the [document preview page](#) or to [download the document instead](#) (the preview page is disabled)

By default, the system will have the setting to show the preview enabled:

Open document details from the documents list

Whether to open document details (with preview) or the document itself when user clicks document name.
If set to No, clicking document title in the documents list will open the actual document (download)

☒ Yes ☐ No

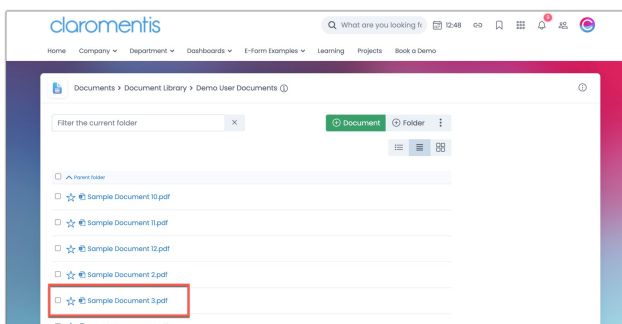
If your team decides to change this and have no preview page, the steps to upload new document versions are slightly different, see below.

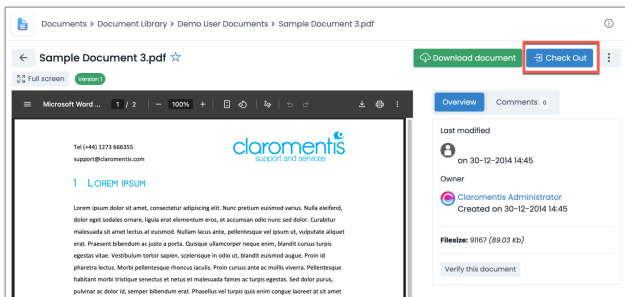
The check-out/in button

The check-out/in button is the primary way to upload a new version of a file in Claromentis.

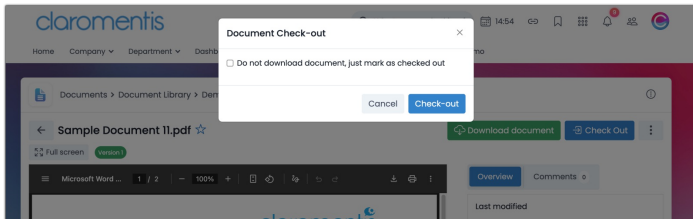
This button will appear in the document preview to users who have been given at least 'View' and 'Edit & approve' permissions.

By default, users can open the document preview by clicking on the file from Applications > Documents when they are navigating around the directory.



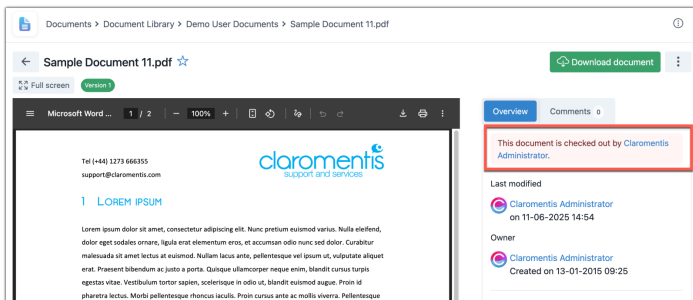


Clicking 'check out' means that a user is working on a new version of the document and is going to upload this.



If a document is checked out, other users will still be able to access and read the current version.

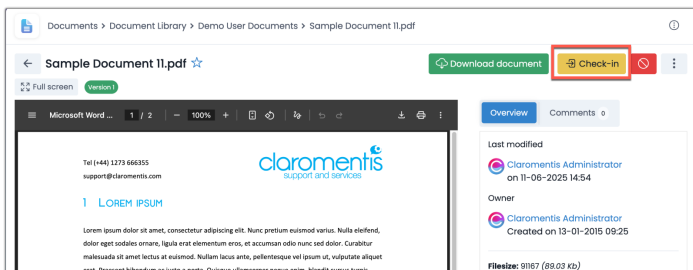
However, other users with permission to update the file will not be able to check it out themselves; a notice will appear on the preview page outlining who has it checked out currently.



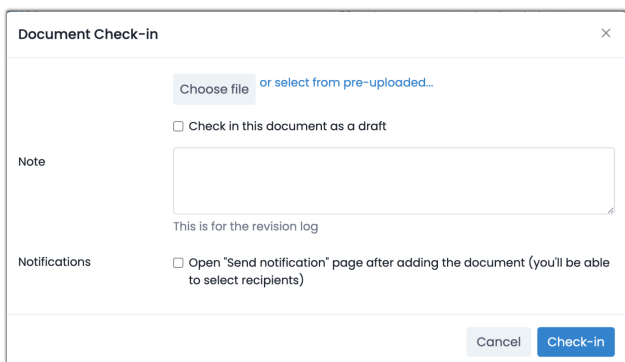
There is the option not to download the document when clicking checkout. If you have already been working on a new version on your computer, you may not need to download the current one stored on the Intranet.

Once you have edited your document and are ready to upload the new version, click on the check-in button that is now displayed.

(The red cancel button on the right will cancel the checkout and allow it to be checked out again by others with permission to do so)



A pop-up will appear:



'Choose file' allows you to select the file from your local computer.

Check the box to upload the file in draft status if applicable; the draft can be changed to a live version later (with using still able to access the version before)

It is recommended to add a description in the 'note' box. This should outline any changes or additions to the document that distinguish it from the previous version. This note will show up in the audit log as well as alongside the document preview.

Choose whether to send out a notification to users that your new version is available. This is especially handy if you are collaborating with another user on the file or are meeting a deadline for them.

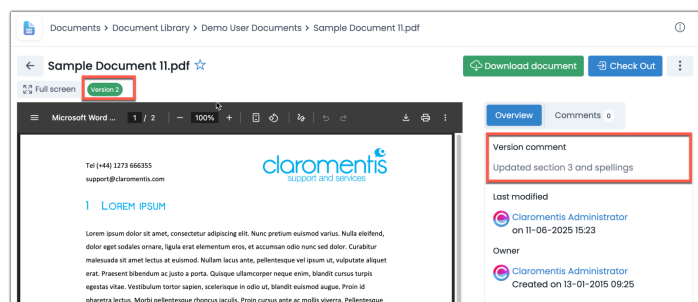
Once you have filled out all relevant information, click 'Check-in' to apply the changes and upload the new version.

Version Control

You will be returned to the document preview screen on saving.

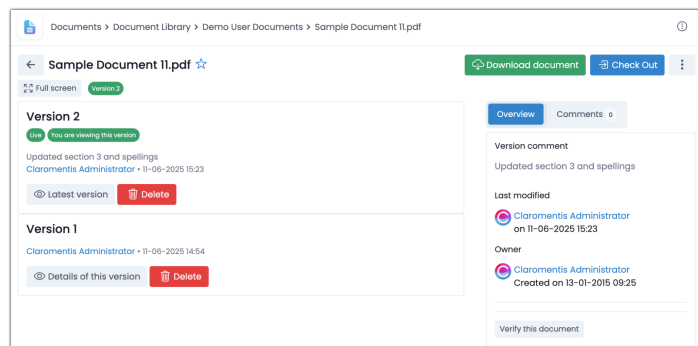
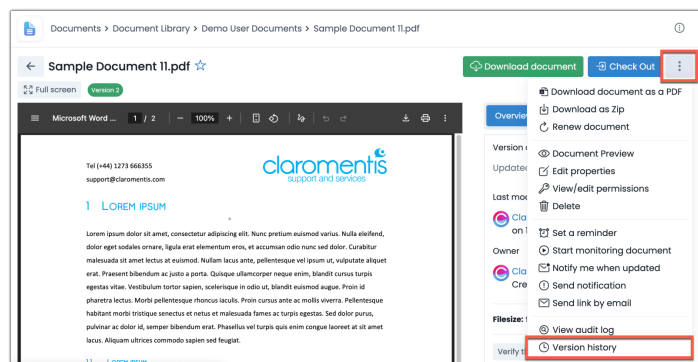
Now the document version is displayed as 'Version 2'. This will also be reflected in the audit log along with the user's name who uploaded it.

Any note added to the upload screen now appears in the document preview.



The document is now available to be checked out again, and repeating this process will label the next iteration of the document as 'Version 3' and so on.

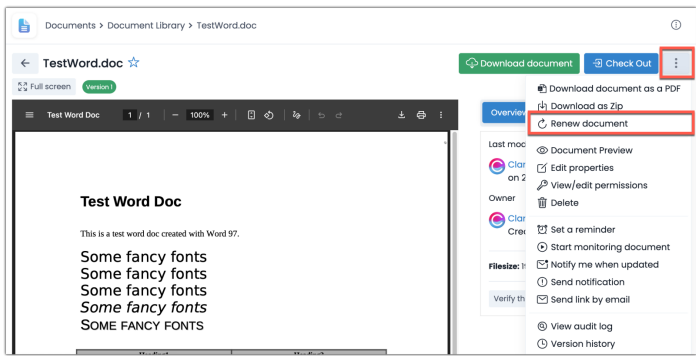
The 'Version History' logs all uploads of each document.



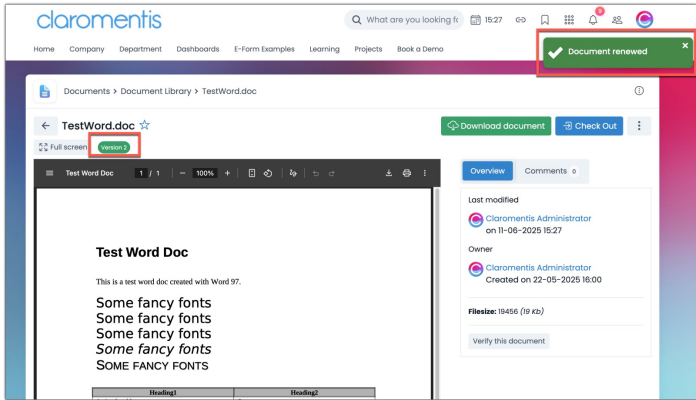
Renew document

A fast way to upload a new version of a document is to click on the renew document icon, rather than following the checkout process.

(This feature is enabled by default but can be disabled by an administrator from Applications > Admin > Documents > General Configuration. Toggle "Allow renewal of documents without checking out" to on.)



The same pop-up as when checking out will appear when using this method, but renewing allows a new version to be applied without having to check out the file first.

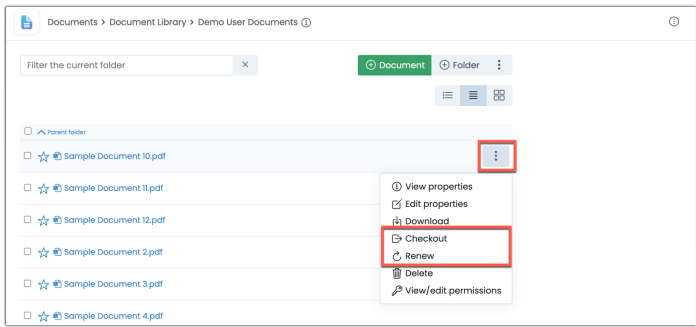


Therefore, it is better to use the 'Check out/in' method if you wish to prevent anyone else from uploading a new version while you are working on yours. For example, if only a few minor changes are being made, you may wish to just renew the document.

However, if the document is going to take a while to amend and you don't want any other users to be able to change it in the meantime, checking out the document first enables only one user to work on the document. Other users will know that they can't amend the document themselves, so the control is with the checked-out user.

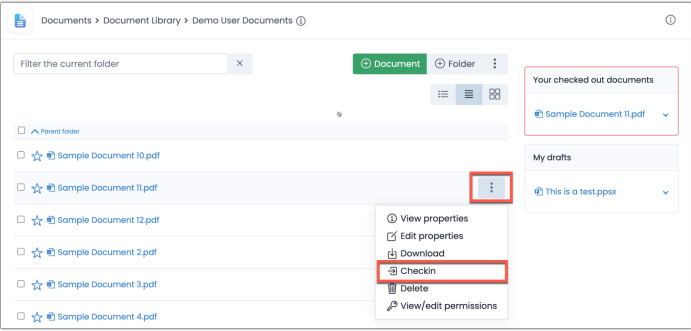
If the document preview is disabled

Rather than opening the preview to use the checkout or renew features, users will need to click the 3 dot menu when in the directory against the file they would like to update:



This reveals the features for use, and the pop-up will appear for them to fill out, just as if they were accessing them from the preview.

Once checked out, open the menu again to see the check-in option.



The preview page will be shown after upload, but any further access of the file by users will be an automatic download.