Editing a Document and Version Control

Introduction

Documents in Claromentis can be updated whenever required. New versions replace the old rather than uploading as a new item completely.

The audit log and version history that run in conjunction with this function record all changes clearly. This is key for keeping documents up to date and allowing information to be reviewed frequently.

When a document is originally uploaded, it is given the "Version 1" label. Every iteration of the document that is uploaded after this will be labelled sequentially.

The history tab shows each version ever created and can have a comment explaining the changes made at each stage.

This is a great way to keep on top of necessary improvements to literature, as well as to help highlight what improvements are needed for the next version.

Please note: A user needs 'View,' 'edit & approve' as well as 'edit metadata' permissions for a folder at a minimum to be able to upload files, otherwise they cannot edit the properties of the documents kept within.

Document Preview

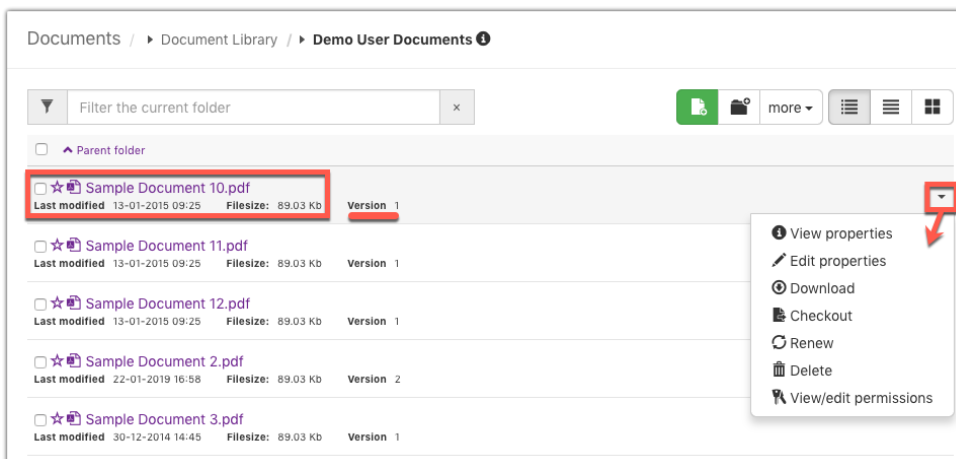Go to Applications > Documents and navigate to the document you wish to edit.

Image 1 - Document list and version number displayed

Select your chosen document by clicking on its name or clicking the small arrow on the right side of the screen as shown in Image 1.

- A drop-down menu will appear, select from the list "View properties".
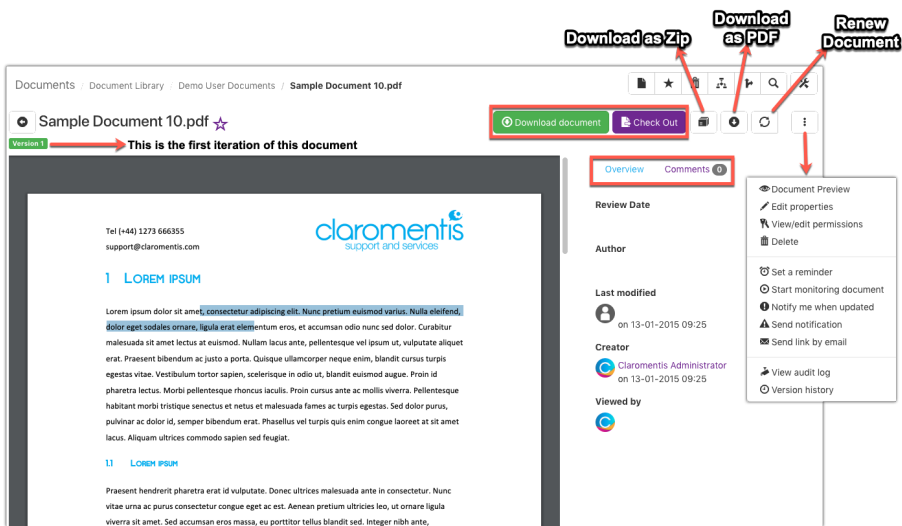- Both methods will take you to the screen shown in Image 2.

Image 2 - Preview document screen and the drop-down menu

The document you have selected will be shown in a preview that takes up most of the screen.

- There is an option to download the document straight from this view.
- There are also icons allowing you to download as a PDF or as a Zip file.
- **Overview** - (To the right of the document preview) Gives a short summary list of the audit log, last viewed by who, review date, and owner/author of documents.
- **Comments** - If this has been toggled on in the document properties, other users can comment on the document once uploaded. The latest comments will be visible here.

From the drop-down menu on the right, there are various options.

- **Edit properties** - Takes you to the screen shown in user guides "Uploading A Document" and "Document Metadata". Allows extra information about a document to be added.
- **View/edit permissions** - Assign access rights to users/role/group. Option to inherit the rights from the parent folder (to save having to input this for each new document in the folder). As seen in the user guide "Creating a folder and "Creating Folder Structure".
- **Delete** - Delete the document and send it to the trash. The document will be held in the trash for 30 days. It can be restored in this time frame but will be automatically deleted when 30 days have elapsed.
- **Set reminder** - Input a date that a notification reminder will be sent to you in Claromentis messenger.
- **Start monitoring document** - Ensure you are notified of any changes to the document, including if it has been checked out or a new version is uploaded. Notifications will continue until monitoring is turned off.
- **Notify me when updated** - Receive a notification when the next change only is made to the document.
- **Send notification** - Send a notification in that instance to users on the intranet with an instruction/note.
- **Send link by email** - This will open up the email on your computer with a link to the document ready to send.
- **View audit log** - A history of any and all changes that have occurred with the document.
- **View version history** - If there have been multiple versions uploaded, a list will appear here with the date and time each version was uploaded.

Editing A Document

Any changes made to a document can be carried out on your computer and then be re-uploaded into Claromentis. Instead of deleting the previous version, you can replace it.

This creates a trail of data and a clear log of the history of the document. There are two methods of replacing a document. Checking it out/in or renewing it. Both can be done directly in Claromentis.

Document check out/in

Checking out a document means that a user is working on a new version of the document. Image 3 shows the pop-up that appears when this is clicked.
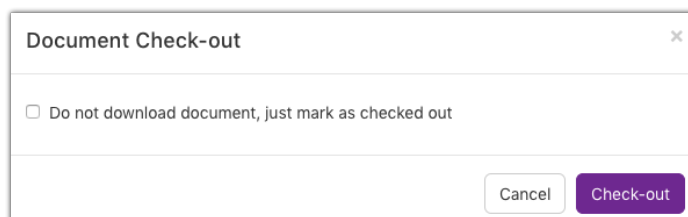

Image 3 - Check out pop up with the option to not download the document

- If a document is checked out other users will still be able to access and read that version.

- However other users will not be able to check it out themselves, instead to the right of the document preview will be a note displaying the user who has the document checked out.
- There is the option not to download the document upon checkout. If you have already been working on a new version on your computer you may not need to download the current one stored in the Intranet.
- Once you have edited your document and are ready for upload, click on the check-in button that is now displayed.

Image 4 - Check-in button allows you to upload a new document version

A pop-up will appear with the option to upload your document.

- You can check the document as a draft if required.
- It is recommended to add a description in the "note" box. This should outline any changes or additions to the document that distinguishes 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.
  - Especially handy if you are collaborating with another user on the project or are meeting a deadline for them.
- Once you have filled out all relevant information, click "Check-in".

Image 5 - Pop up to upload edited document note has been added to distinguish differences

Version Control

You will be returned to the document preview screen, as shown in Image 6.

- 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.
- The 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.
- If you click on "Version History" from the drop-down menu shown in Image 2, you can see a log of all uploads of this document. Image 7 shows this screen.
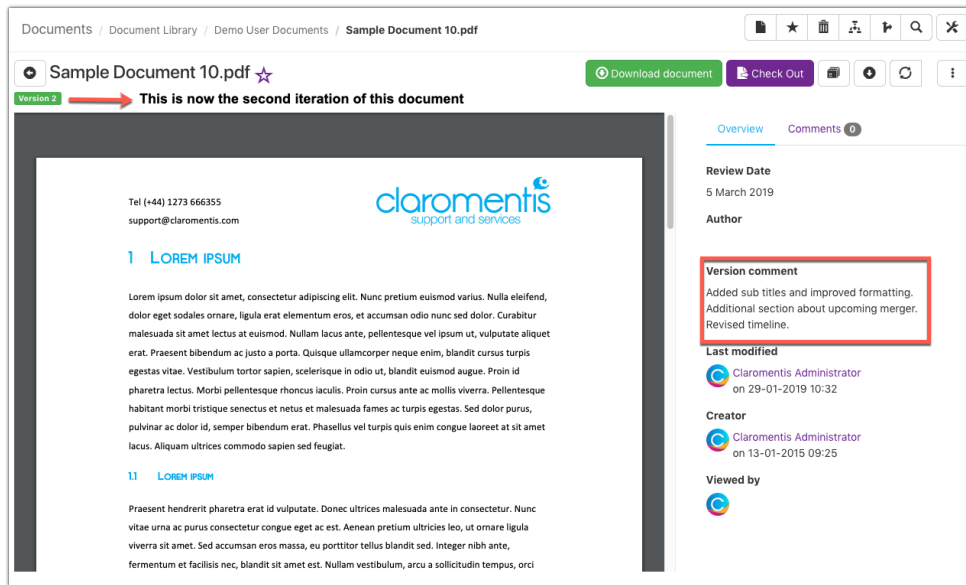
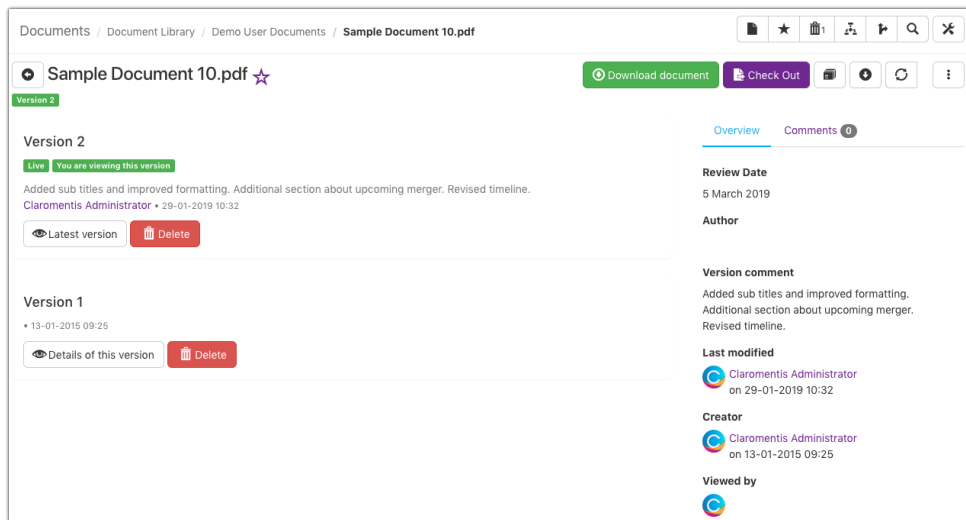*Image 6 - Version 2 of this document has been uploaded along with a comment*

Image 7 - Version history screen

Renew document

A fast way to upload a new version of a document is to click on renew document icon, shown in Image 2.

(If you cannot see the icon, you can enable the feature. Go to Application > Admin > Documents > General Configuration. Toggle "Allow renewal of documents without checking out" to on.)

- The same pop-up shown in Image 5 will appear when using this method.
- Renewing a document allows a quick upload without having to check it out first.
- It is better to use the "Check out/in" method if you wish to prevent anyone else from uploading a new version.
  - For example, if only a few minor changes are being made, you may wish to just renew the document.
  - 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.