GUIDE: DOCUMENT EDITING (CHECK IN / OUT) AND TEXT SEARCHING

A document may undergo many changes throughout its life in ECM and does not need to be a final version at the point that it is registered. When a document is edited, ECM assigns a new version number, providing a document revision function which layers new versions ontop of version one.

Editing Excel and PowerPoint

1. Locate and highlight the document to edit

2. Either: Right-mouse-click select `Edit`; or click `Edit` from the toolbar.
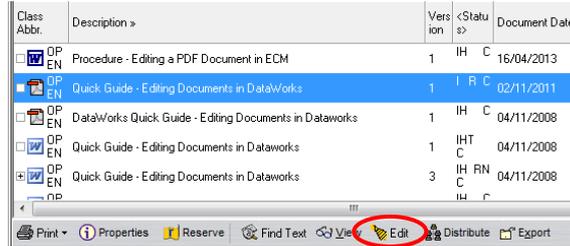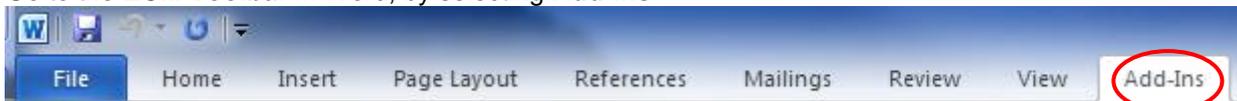
3. "Choose a Check-Out User Group" window offers your name or group - select **OK:**

4. The document will open - make the required changes.

5. Make the required changes then **Save** and **File → Exit** the document.

6. To check the document back into ECM, go to your **Task List** in ECM, click on the **Standard CheckIn** task and hit **Completed** `Completed`. The document is now checked back into ECM

Editing Word using the ECM Toolbar

1. Locate and open a Word document in ECM (double-click or click **View)**. The document will open as *Read-Only*.
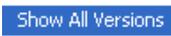2. Go to the **ECM Toolbar** in Word, by selecting **Add-Ins**

3. Select **ECM: Check-Out**

4. "Choose a Check-Out User Group" window offers your name - select **OK:**

5. Note: Read-Only attribute is removed from the title bar of the Word document.

6. Once all the required changes have been made select **ECM: Check-In**

7. A status bar will appear and the document will be checked back in to ECM.
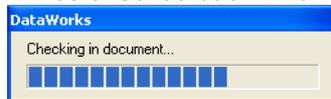
Viewing Edited Documents

1. Search for a document that has been edited and right click. Select the `Show All Versions` option from the menu that appears. Note: if this is greyed-out/locked please contact Information Management Group.

2. All versions of the document will be displayed as a list and multiple functions can be accessed from this window. **View** or double-click to open; to access notes select **Properties**. **Close** to exit window.

Leaving Documents Checked Out For Further Editing

1. Check out a document and make the required changes. Save the changes and exit the document.

2. The document will <u>not</u> be checked in and will appear on your **Task List** as a **Standard CheckIn** task.

Status		Task
☐ ■	cN	For Your Information (Re: Plant and Equipment Report)
☐ ☐	--	**Standard CheckIn**
☐ W	--	Quick Guide - Editing Documents in Dataworks

3. To continue editing the document from the Task List, highlight it, right click and select the **Edit** option (or select the **Edit** button). Make the changes then **File→Save→Exit** the document. This can be repeated as many times as necessary.

4. To check the document back in, *Complete* the Standard CheckIn task. Alternatively, within Word you can select the **ECM: Check-In** button from the toolbar. This will automatically complete the Standard CheckIn task.

Notes on Editing:

- A *Standard CheckIn* task will remain on the selected user's Task List until the document is checked back into ECM.
- Documents checked-out to a group will result in a Standard Check-in appearing on the Task List of all members of the group. Any member of the group is able to check the document into ECM.
- Version Control – when edited, a new version (*Rev.No.*) and document number is assigned upon check in. Internal Reference No. remains unchanged.
- The document number will change therefore if you use this method to search take note of the new document number.
- Notes will not be passed on to the new version however **Summary [Z]** in **Notes** shows <u>all</u> notes against <u>all</u> versions of a document.

Searching Documents for Text

A search can be conducted for text within a text-based document. Text searching is available within ECM to search the content of text-based documents. This process may be initiated from:

- Search Results screen
- The Clipboard
- The Standard Registration screen; and
- Floating Search Results window

1. Locate and select the document to be searched
2. Click [Find Text]:
3. Enter the text to locate:
4. If required, select [Match Case] and/or [Whole Word]:
5. Click [Find Next] to initiate the search
6. If the search has been successful, the ECM Viewer will display the selected document with the matching text highlighted. However if the search has not been successful, a message will be displayed.