

## Comprehensive Guide to Versioning in the Records Management System

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**Overview** [\[Back to Top\]](#)

### ***What is “Versioning”?***

The Records Management System contains a version management function for records and other editable documents which were created within the Records Management System. An individual with the Records Management User role can manage any number of versions of a particular document.

Important Note: If the document is not in an editable format, such as a PDF, use the application’s “Save As” function to denote the updated version within the document’s title. After saving the updated version, attach it in the folder in Records Management.

### ***When Should I Use the Versioning Function?***

As stated in the [revised Records Management Policy dated September 27, 2010](#) and signed by Jeffrey Mandel, Chief Procurement Officer, edits to attachments and the version assigned will be determined by the folder which they reside in:

COPA Documents Attachment Folder: All changes to attachments must be done within the SRM procurement document. Thus, no version management within Records Management will be necessary.

Additional Documents Folder and Protests Folder: All changes to attachments must be completed using the version management utility in Records Management. For documents that are not in an editable format, a new version of the document must be added to the folder. Each version should be denoted by v1, v2, v3, etc. All versions of the attachments must remain in this folder.

Notes and Working Papers Folder: No version management is required for attachments; the current or most recent version is acceptable.

This End User Procedure will only cover the steps involved in creating, changing, and removing a versioned document. Keep in mind that this is a comprehensive guide for new users, and many of these steps described on the following pages may be performed using shortcuts as you become more comfortable with the Records Management System.

## Creating the Initial Document [\[Back to Top\]](#)

A document is created in the Records Management System using the *Document Client* (see Figure 1a below). As shown in Figure 1b below, there are three Application types available with which to create the document: Microsoft Office Word, PowerPoint, and Excel.

Figure 1a:

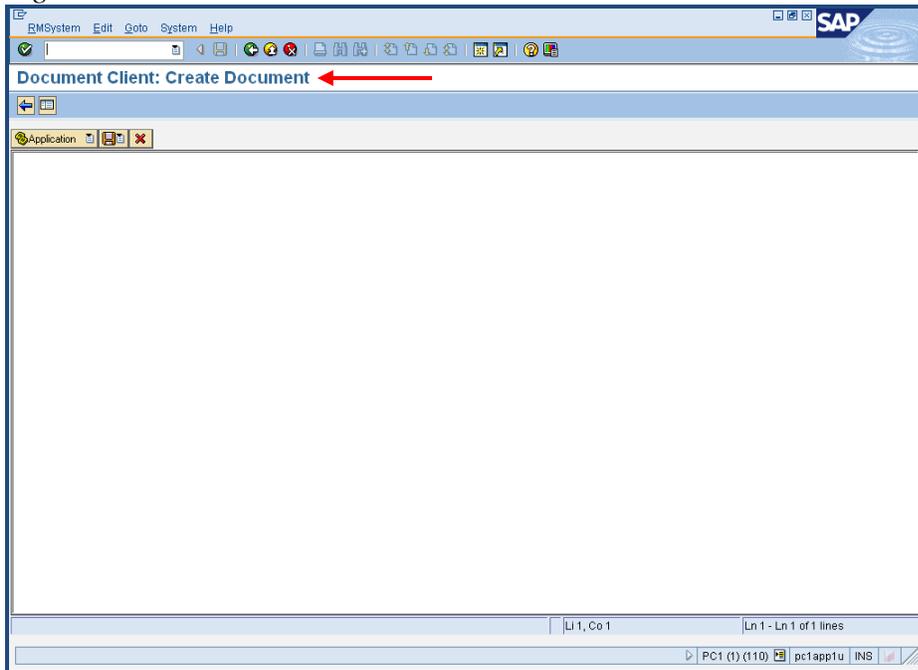
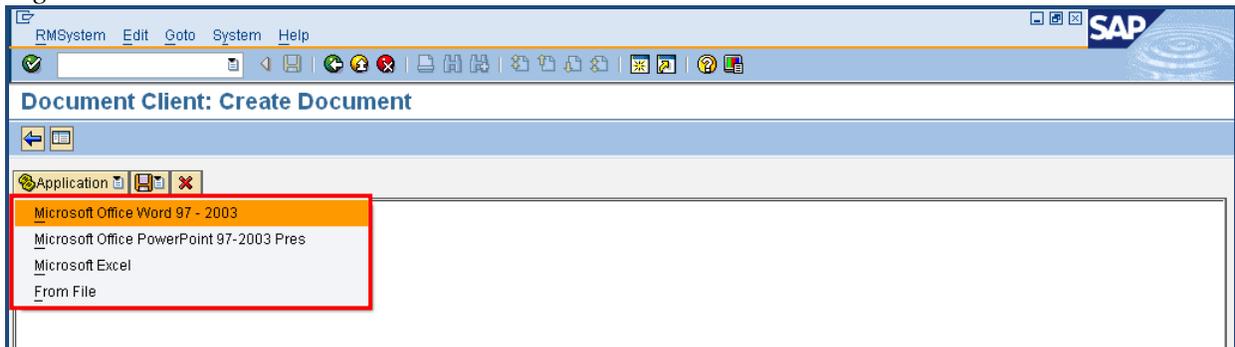
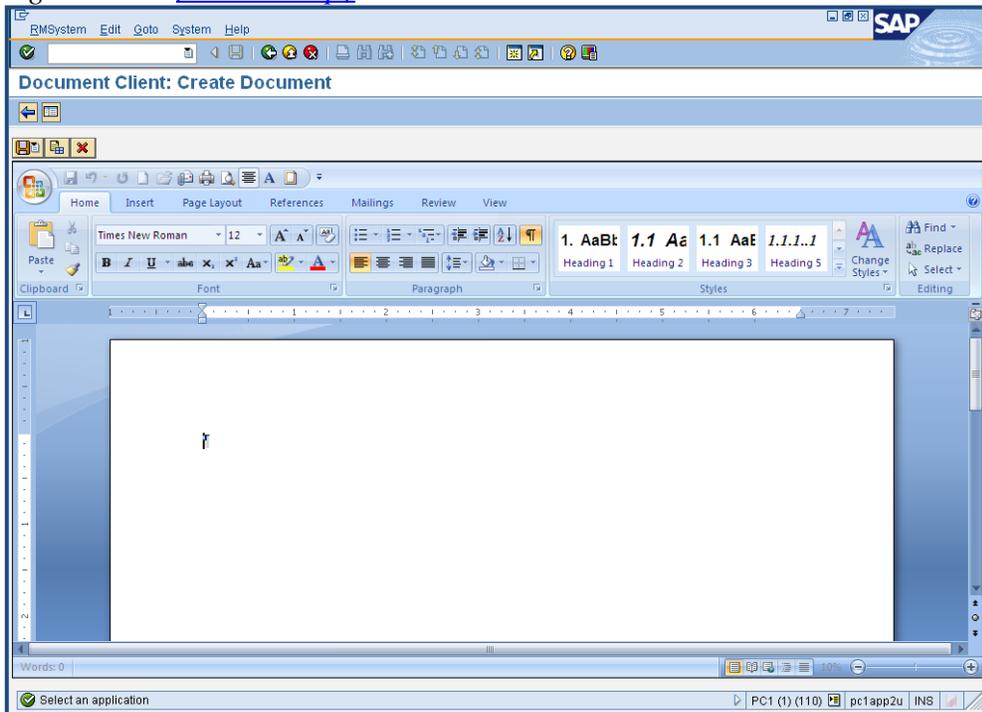


Figure 1b:



Upon selection of the **Application**  button, a dropdown menu appears with the options shown in Figure 1b. When an Application type is chosen, the applicable editor opens in a new window within Records Management. An example is shown in Figure 1c below, where Microsoft Word was selected as the Application type:

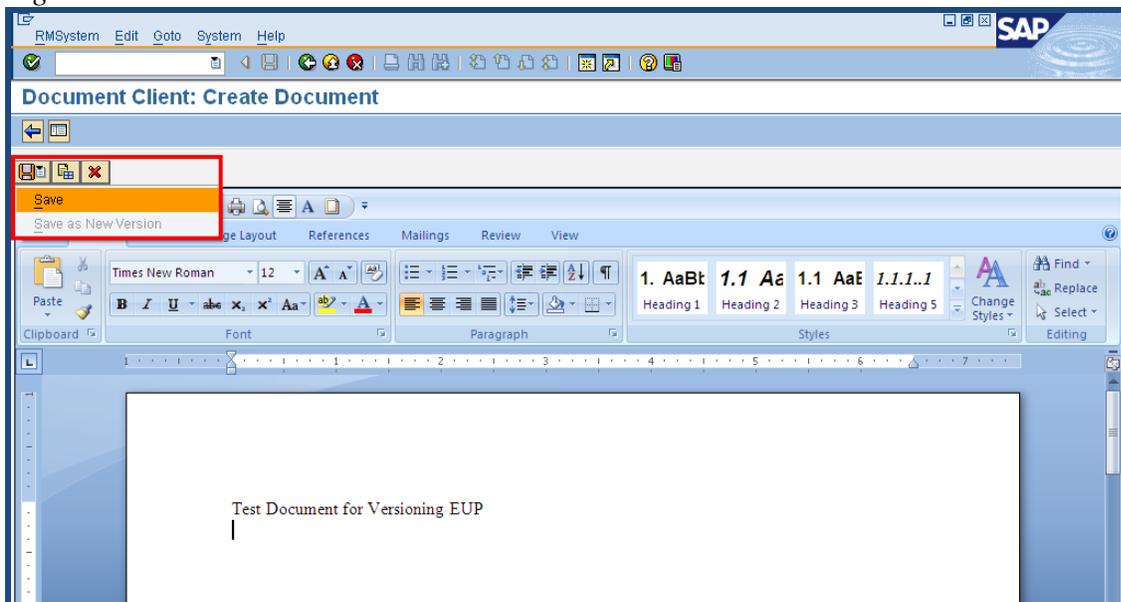
Figure 1c: [\[Back to Top\]](#)



Note that all standard functionality is available in the MS Word editor except for Save , Open , and New ; and that you are able to construct the document as you would outside of Records Management.

When the document is complete and ready to be saved, select the Records Management **Save**  button as shown in Figure 1d below. As this document is newly created, the “Save as New Version” option is not available.

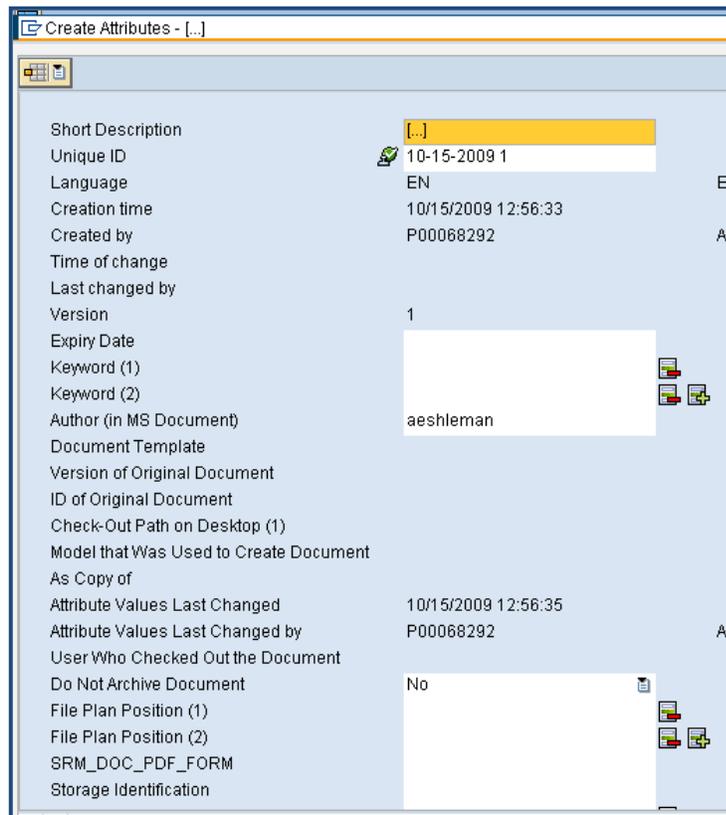
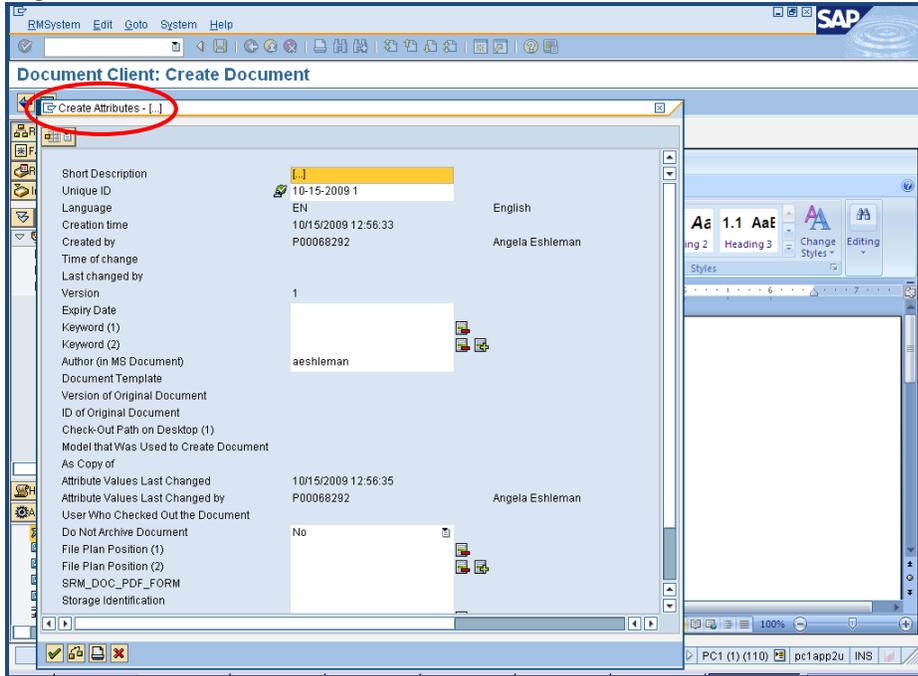
Figure 1d:



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The *Create Attributes* dialog box is displayed, in which you will enter attribute values for the document. See Figure 1e below.

Figure 1e:

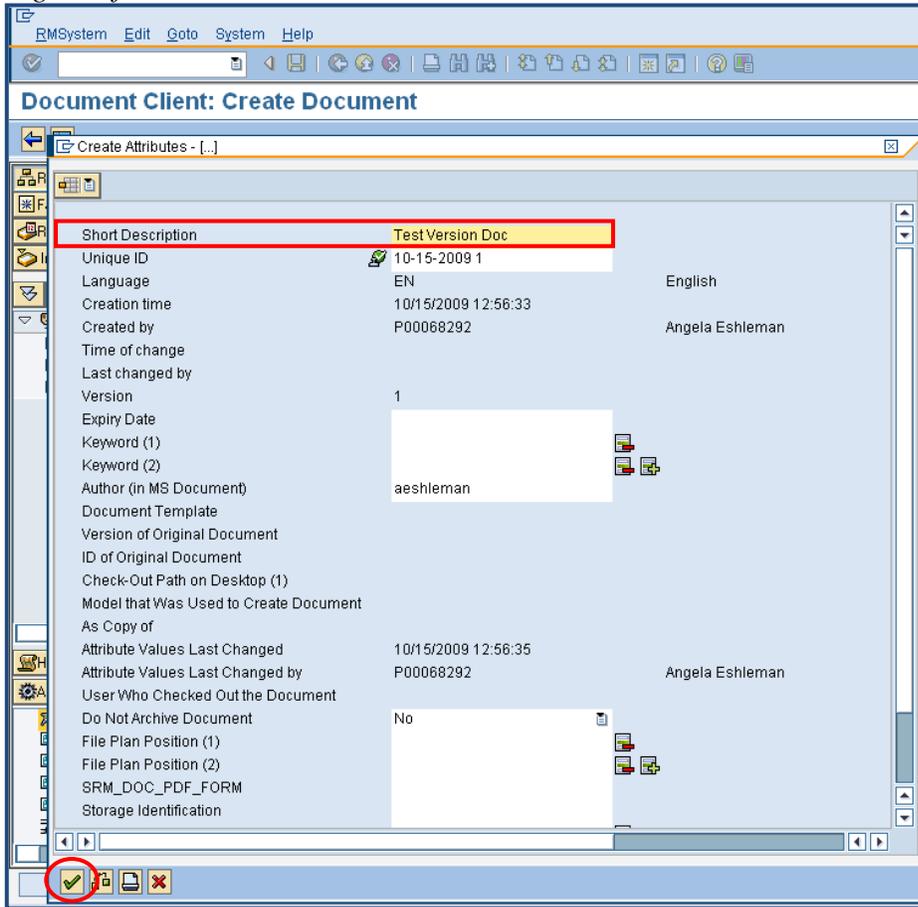


As shown in this close-up of Figure 1e, there are two types of **Attributes**: *Maintainable* and *Displayable*.

*Maintainable Attributes* are recognizable by the open data entry fields; e.g., the white fields. The first field in *Maintainable Attributes*, Short Description, has been designated for mandatory entry.

*Displayable Attributes* are pre-populated and the field is shaded gray.

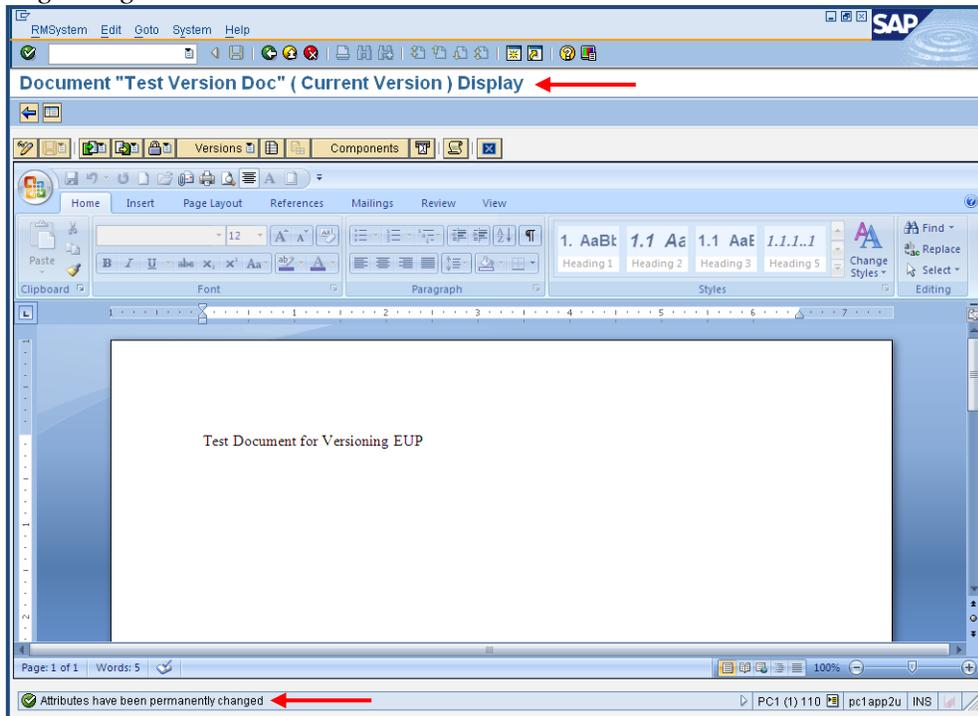
Figure 1f:



Complete the Short Description field, as well as any additional fields as desired.

Select the Enter  icon when all data entry is complete.

Figure 1g:



As shown in Figure 1g, the document title displays and the version is identified.

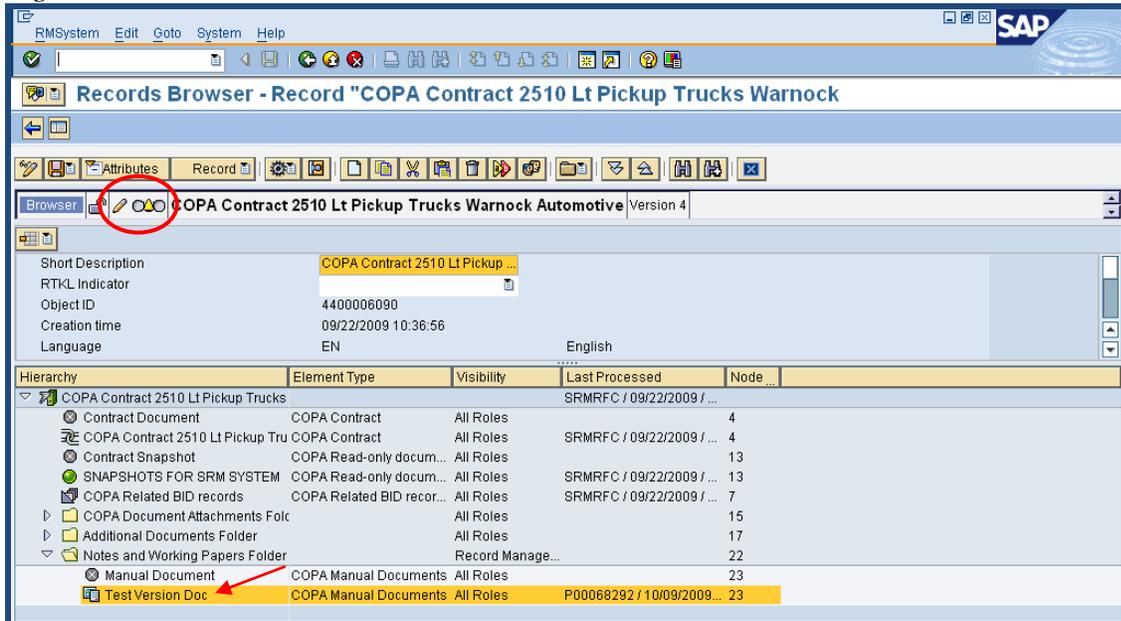
In the message bar, the message "Attributes have been permanently changed" displays.

Select the **Previous**  icon to go return to the Records Browser.

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## The Records Browser

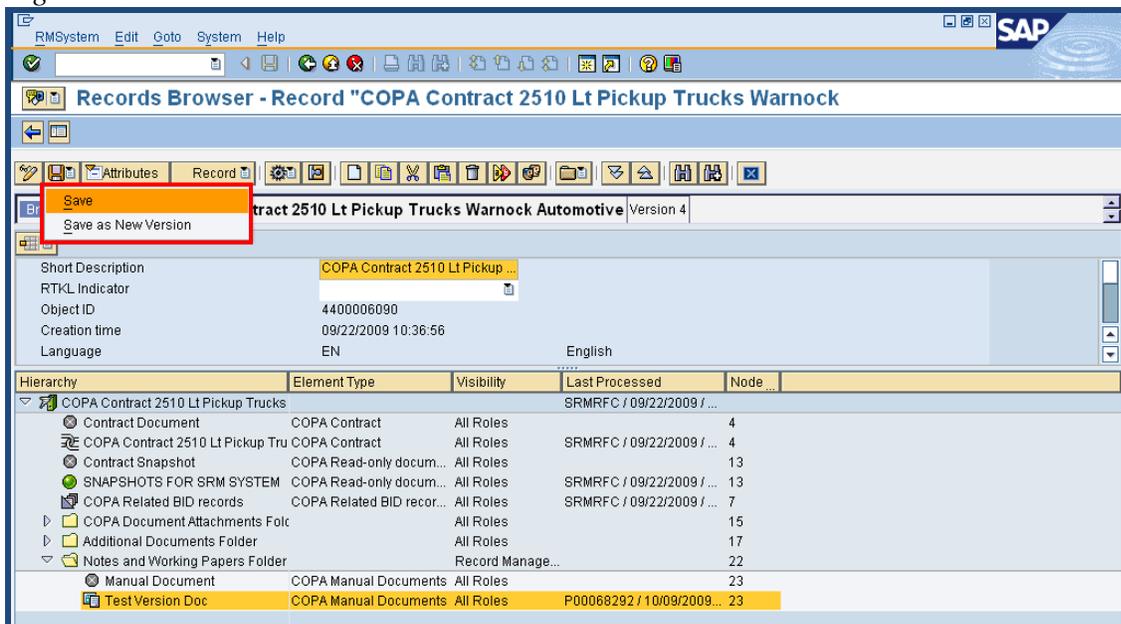
Figure 2a:



In Figure 2a above, the document has been attached in the Notes and Working Papers Folder. However, the status indicator shows the Record as "Not Yet Saved".

In Figure 2b below, the Save  button is selected and the option "Save" is chosen. ("Save as New Version" is not to be used in the Records Browser.)

Figure 2b:

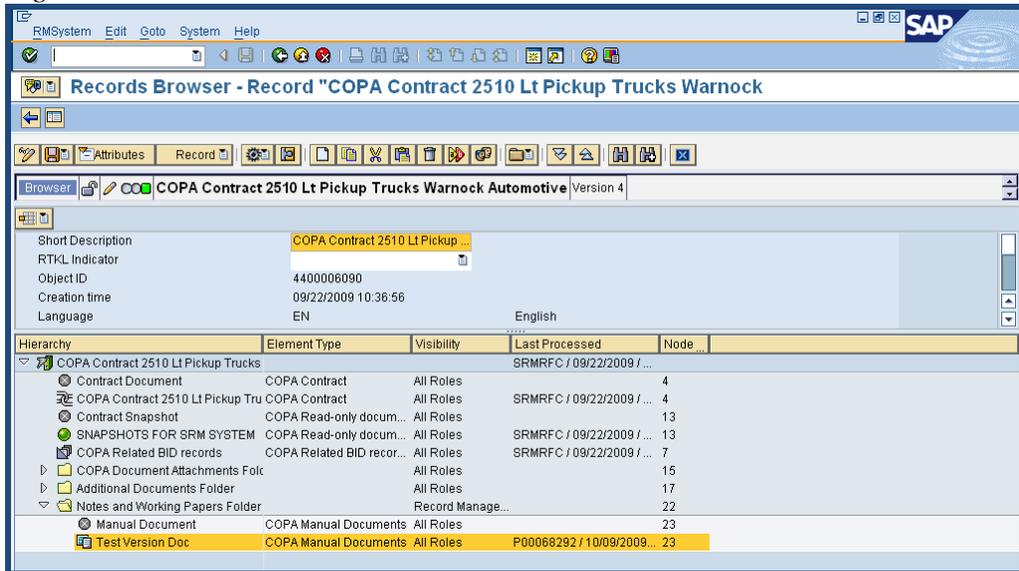


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## Saving as New Version

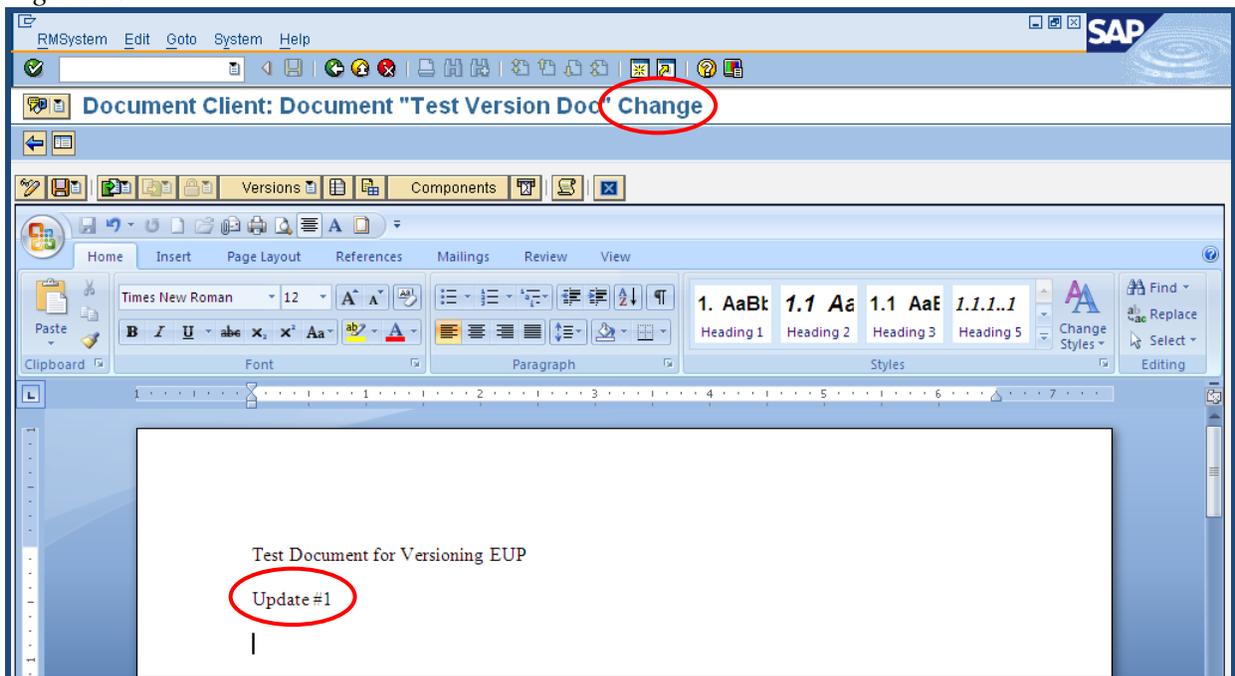
Now that the Record is in Saved status as shown in Figure 3a below, we're going to open the newly attached document and make changes.

Figure 3a:



When the attachment is opened, the user is automatically in “Change” mode. This status is indicated in the document title as well as the Word editor, as displayed in Figure 3b below. In this example, the text “Update #1” is entered in the document.

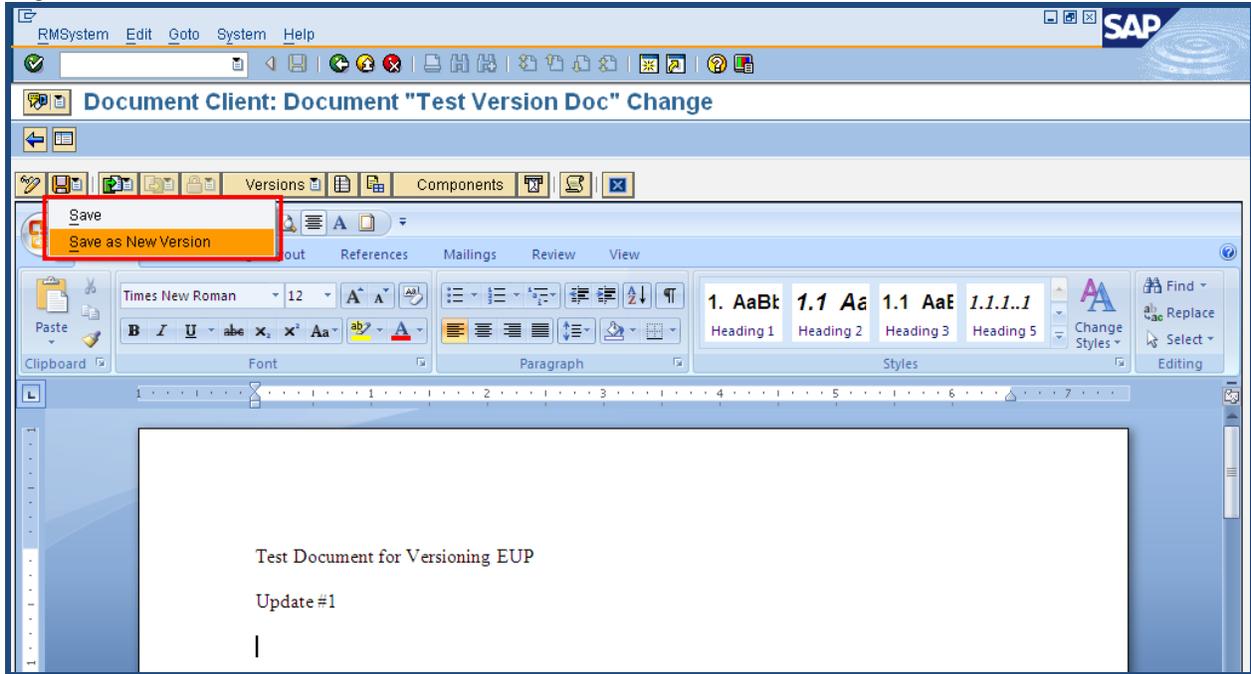
Figure 3b:



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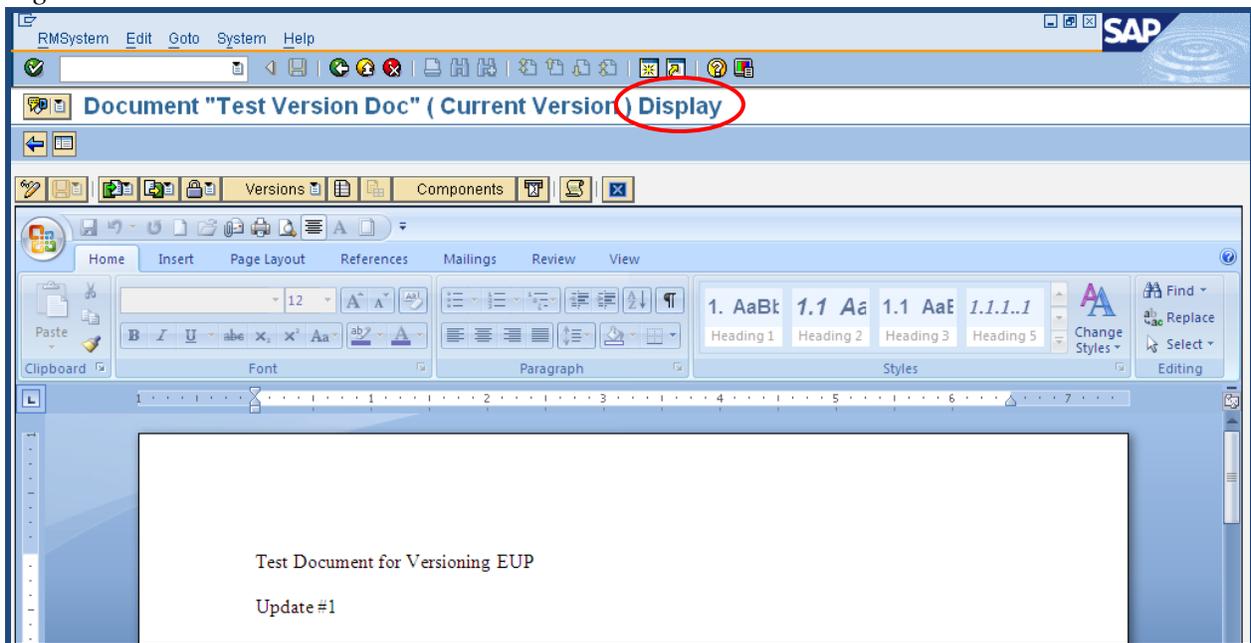
When the changes to the document are complete and ready to be saved, select the Records Management **Save**  button as shown in Figure 3c below, and select the “Save as New Version” option. (If you recall from Figure 1d, this option was not available previously.)

Figure 3c:



After the document is saved, the user is automatically in “Display” mode. As before, this status is indicated in the document title as well as the Word editor, as displayed in Figure 3d below.

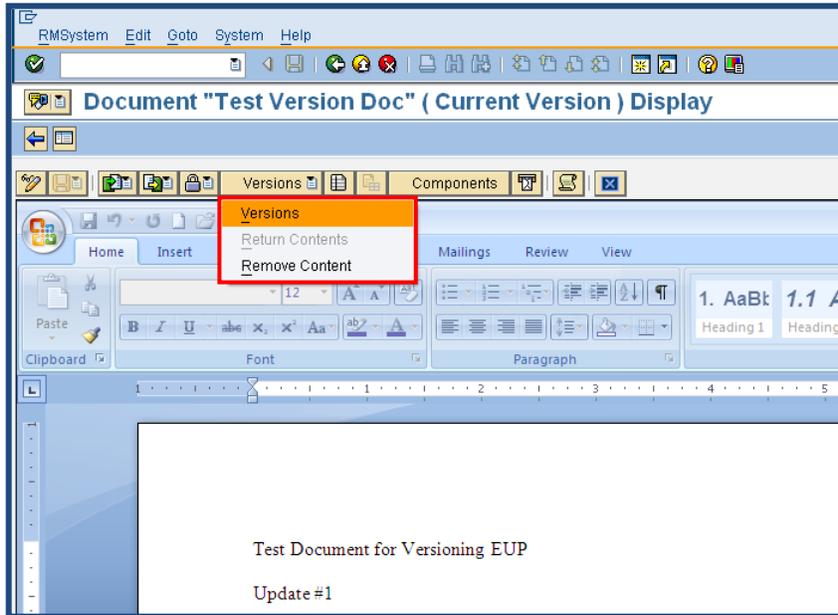
Figure 3d:



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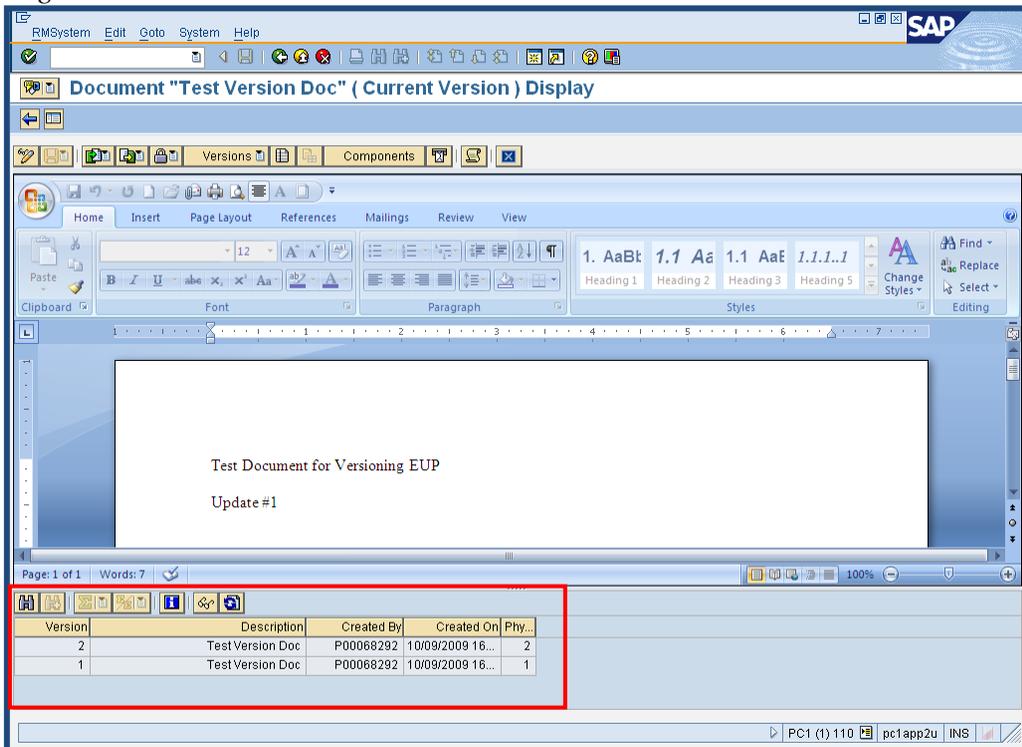
## Displaying the Document Versions

Figure 4a:



In order to display the different versions of your document, select the **Versions** button, and then choose “Versions” from the drop-down menu.

Figure 4b:



A list of the different versions will display in a window below the open document, as shown in Figure 4b.

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As shown below in this close-up of Figure 4b, the versions of the documents are listed, and identified by Version number. The *Current Version* is always listed first in the versions window and will have the highest number.

Version	Description	Created By	Created On	Phy...
2	Test Version Doc	P00068292	10/09/2009 16...	2
1	Test Version Doc	P00068292	10/09/2009 16...	1

To view a different version of the document, highlight (e.g., select) it as shown below in Figure 4c, and then select the Display  icon. Or, alternately, simply double-click on it to view.

Figure 4c:

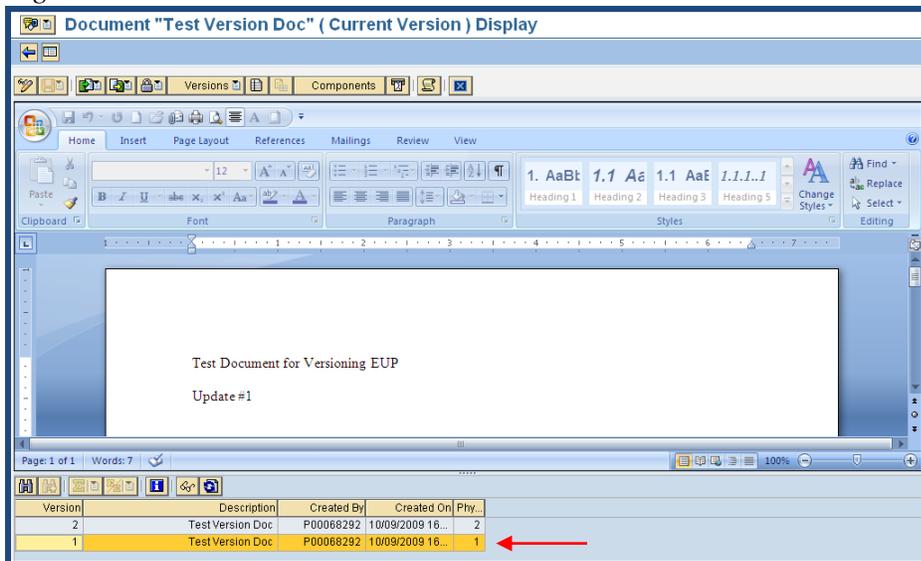
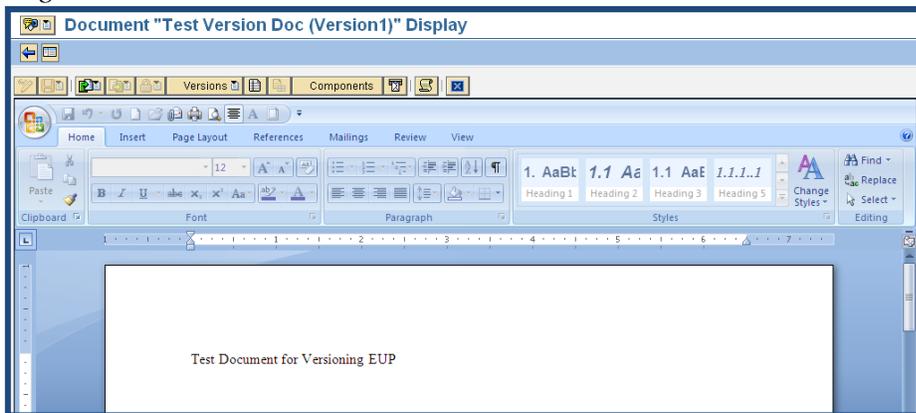


Figure 4d:



The original version, or Version 1, is displayed. This is indicated in the document title as displayed in Figure 4d.

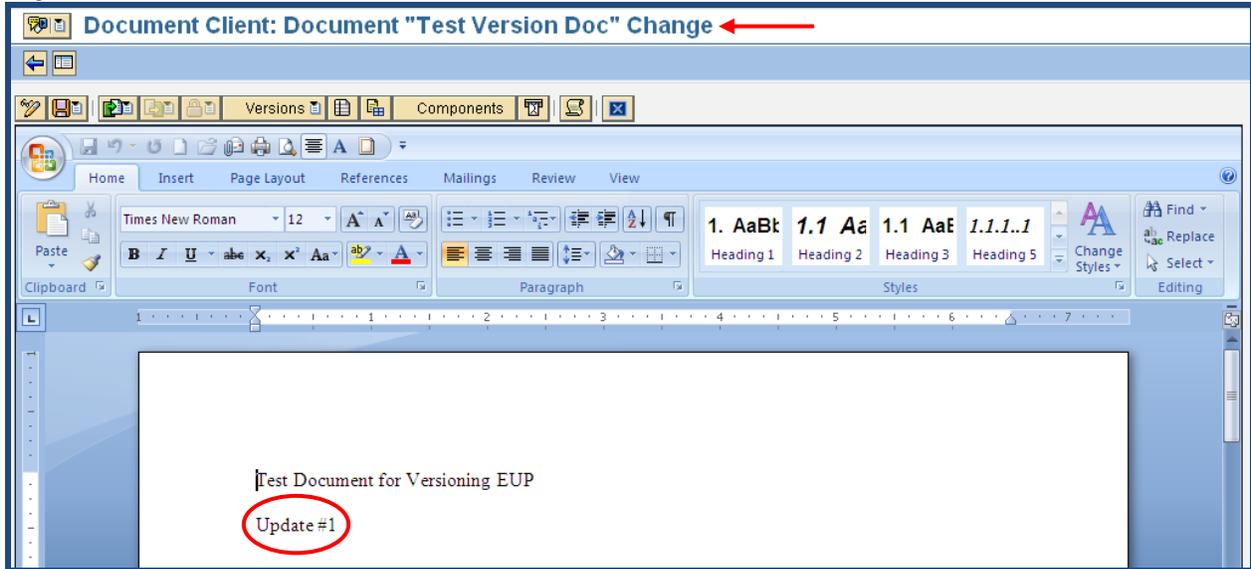
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### Navigating through the Versions

Navigation through the different versions can be accomplished by using steps described in the previous section. In addition, when displaying an older version such as in Figure 4d, navigation can occur by selecting the **Previous**  icon on the existing screen.

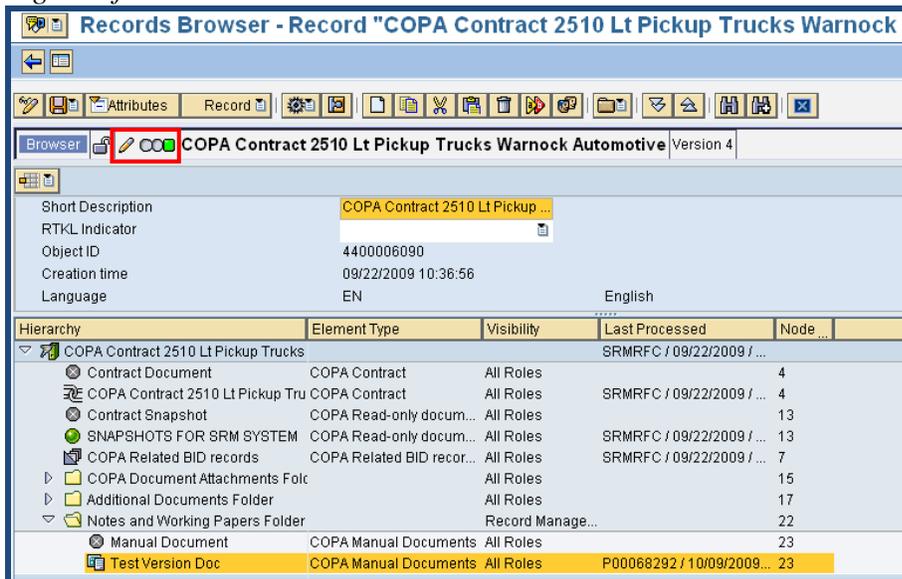
The user is taken back to the previous screen and version, as shown in Figure 4e. Also, the Document Client is automatically in “Change” mode. Therefore, use **Previous** with caution, especially if there are numerous versions of a document.

Figure 4e:



To return to the Record Browser from the Document Client, select the **Previous** icon again. The Record remains in “Saved” status, as shown in Figure 4f below, so there is no need to re-save.

Figure 4f:



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## Return Contents

Within the version management utility is the option *Return Contents*. With this option, an older version of the document becomes the current version again. To do this, select the applicable version (see Figure 5a) and open it.

Figure 5a:

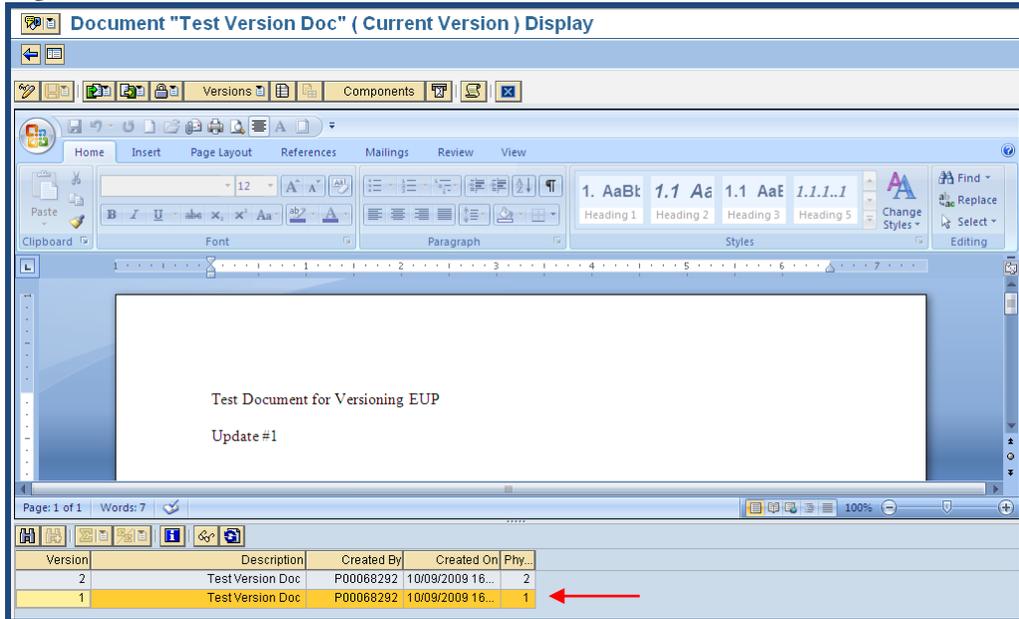
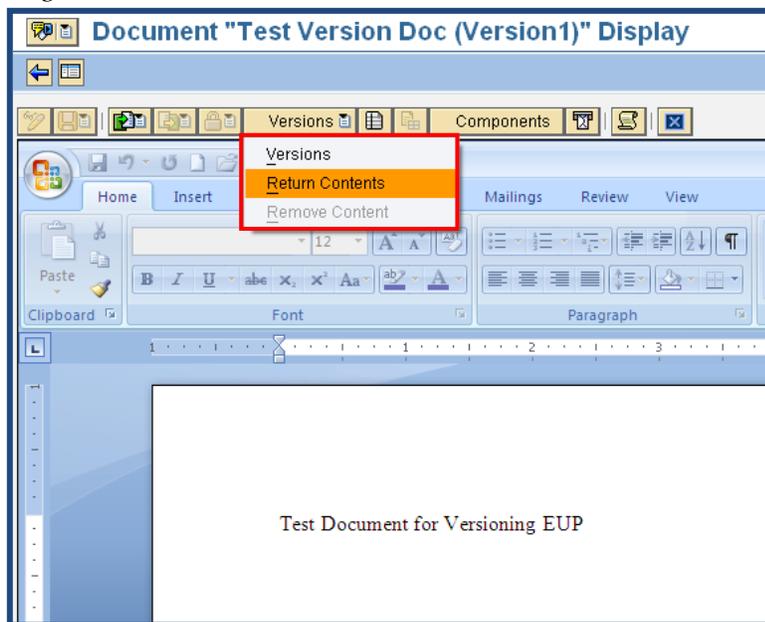


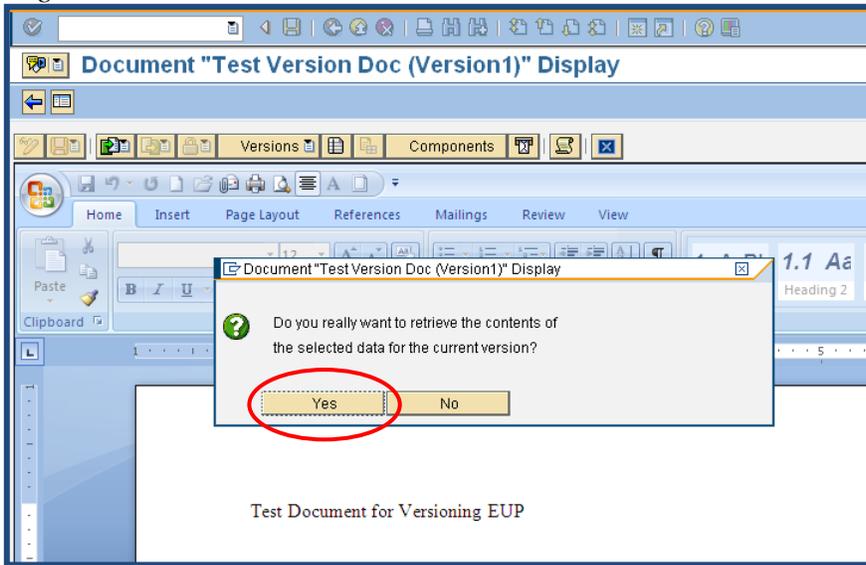
Figure 5b:



Now select the **Versions** button and select the *Return Contents* option as shown in Figure 5b.

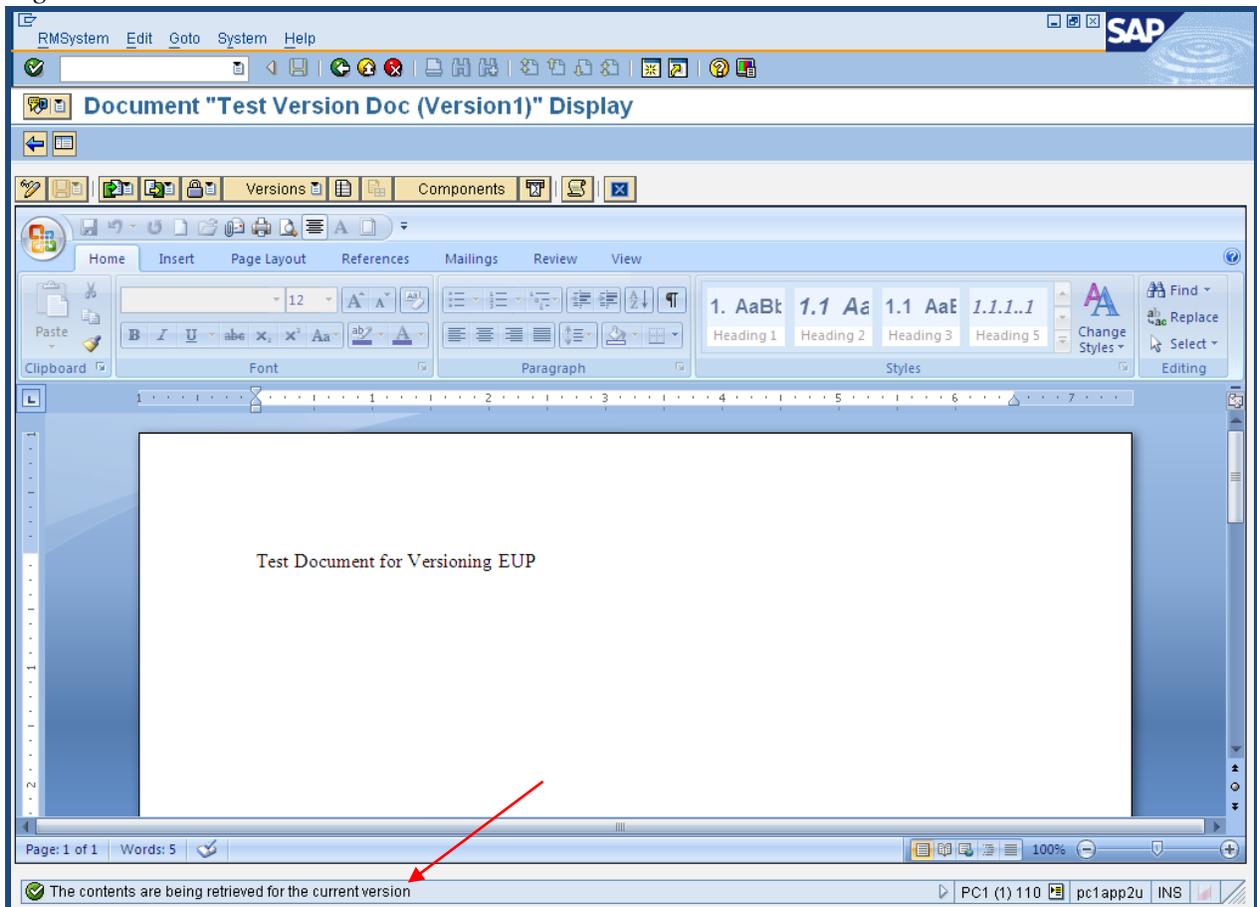
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Figure 5c:



At the dialog box prompt, select **Yes** or **No** to proceed with retrieving the contents for the current version. In this example, we are selecting **Yes** as shown in Figure 5c.

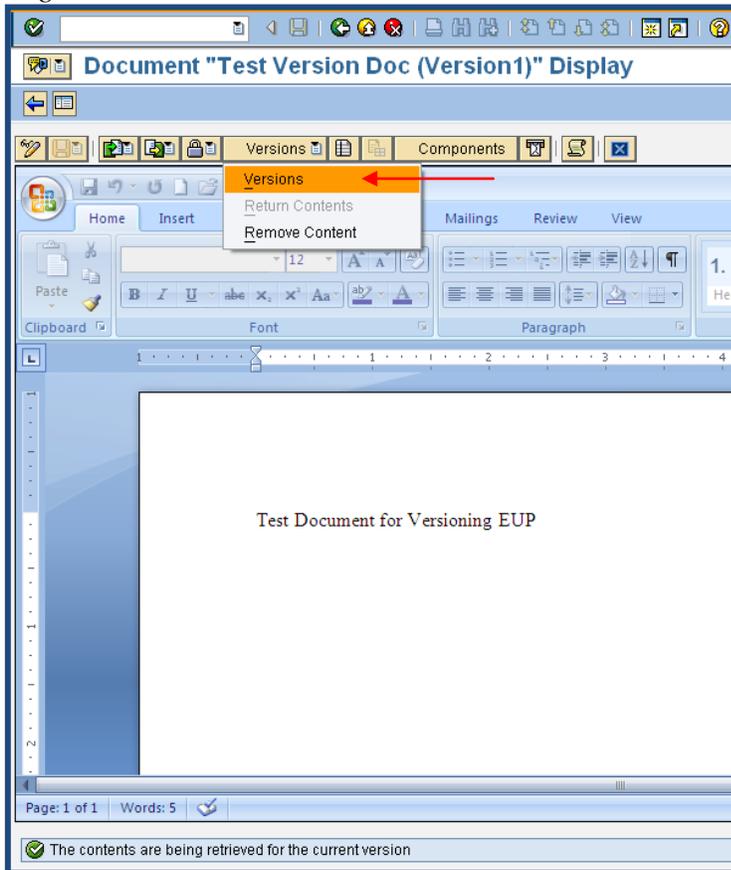
Figure 5d:



As shown in Figure 5d, the following message displays as status bar “The contents are being retrieved for the current version”.

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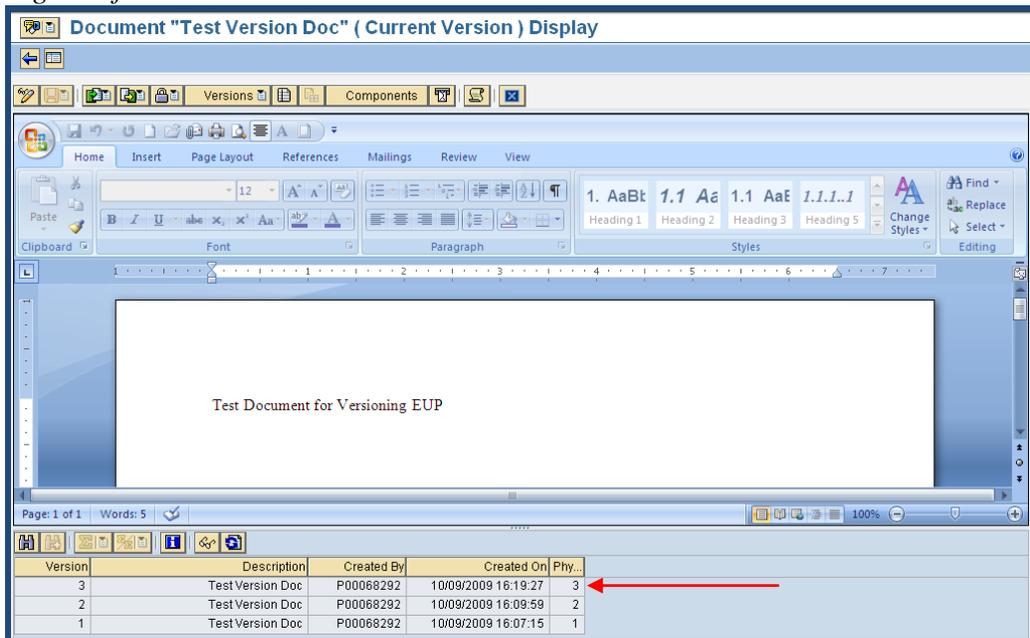
Figure 5e:



Verify that the action has been completed by selecting the **Versions** button and choosing the *Versions* option from the dropdown menu.

In Figure 5f below, note that in the Versions window an additional version – 3 – is listed. Version 1 still exists, but it was duplicated and named Version 3.

Figure 5f:



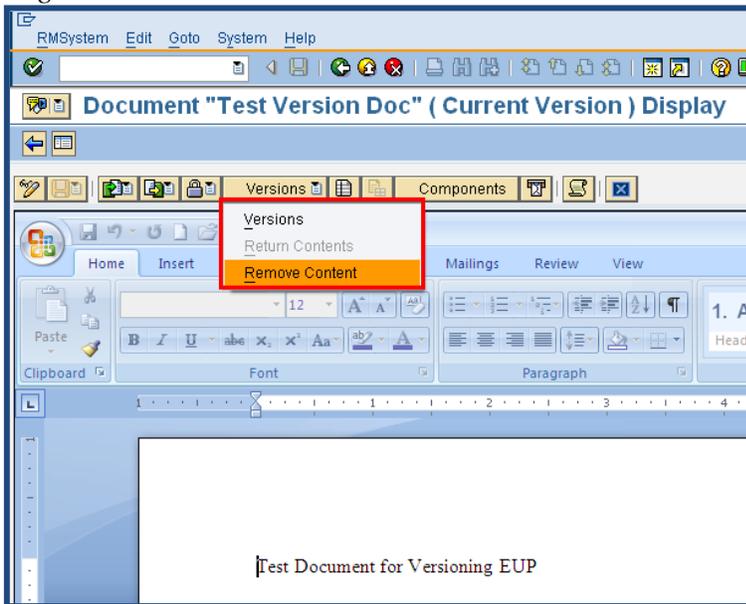
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## Removing Content

It is possible to delete some or all of the document versions from the Document Client. However, as all versions of a document must remain in the Additional Documents Folder and the Protests Folder, you should only use this feature with a document in the Notes and Working Papers Folder.

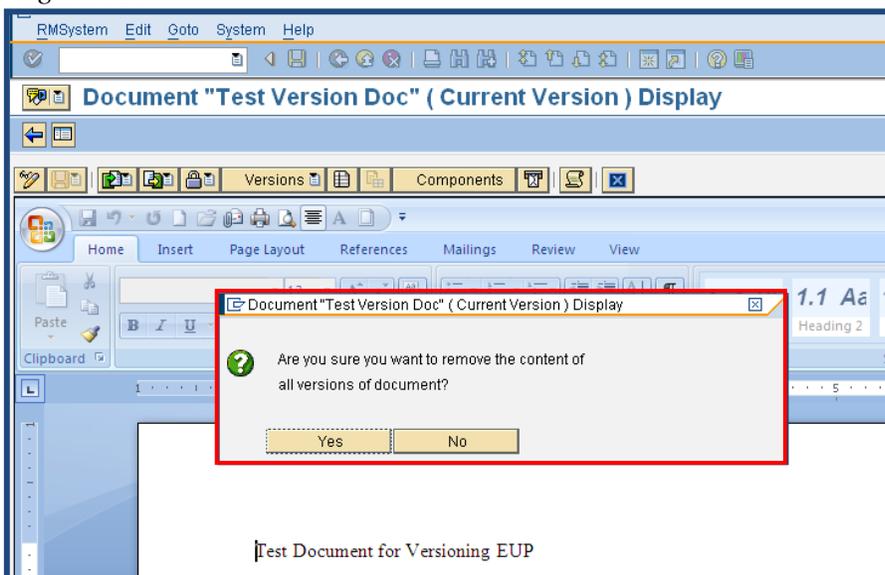
Deletion of a document version is done by first opening the attachment and then selecting the **Versions** button. As noted previously, the version identified as “current” will display by default.

Figure 6a:



In order to delete a version, the *Remove Content* option must be chosen from the dropdown menu, as shown in Figure 6a.

Figure 6b:

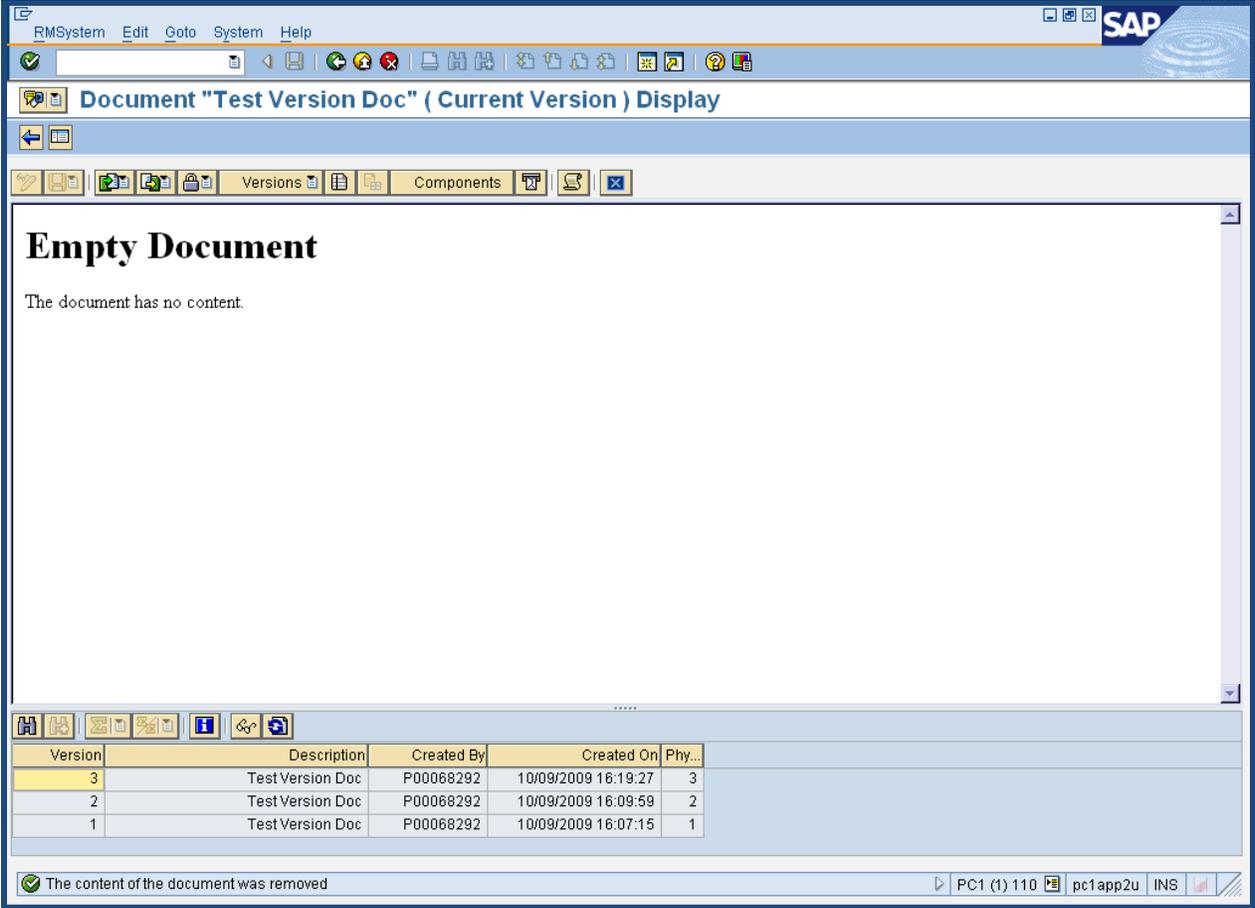


As you can see in Figure 6b, a dialog box prompts you to select **Yes** or **No** to proceed with the removal of the content of all versions of the document.

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As shown in Figure 6c, the Document Client window indicates that it is an empty document with no content. In addition, the following message displays in the status bar “The content of the document was removed.”

Figure 6c:



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END