

VIEW CHECKOUT DOCUMENTS

ECM WORD ADD-IN

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CHECK IN

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ECM WORD ADD-IN

It is important to review the role of the ECM Word Add-in and its function within ECM.

Save Document Draft – ECM Word Add-in

If a user has a document checked out and wants to save the latest changes to the document repository, the user clicks “Save Draft to ECM” from the Microsoft Word File menu. The document is saved to the repository as a draft. The minor version number of the document is incremented (e.g. version 1.1 becomes version 1.2).

Document drafts are considered in process and are not visible in the Folder’s documents screen. In the documents list on the folder screen, a lock icon still shows that version 1 of the document is checked out.

While the document is checked out, the user may save a document draft and be able to work on the document later. The user clicks “Save Draft to ECM” from the Microsoft Word File menu and then closes the Microsoft Word application. The draft version of the document is saved to the system. Drafts are only visible to the author. When a draft version is saved, the draft version does not appear in the folder. On the folder, the document remains checked out.

Later, to resume work on the document, the user accesses the View Checked Out Documents screen from the ECM main menu. This screen is shown in **Figure 1**.

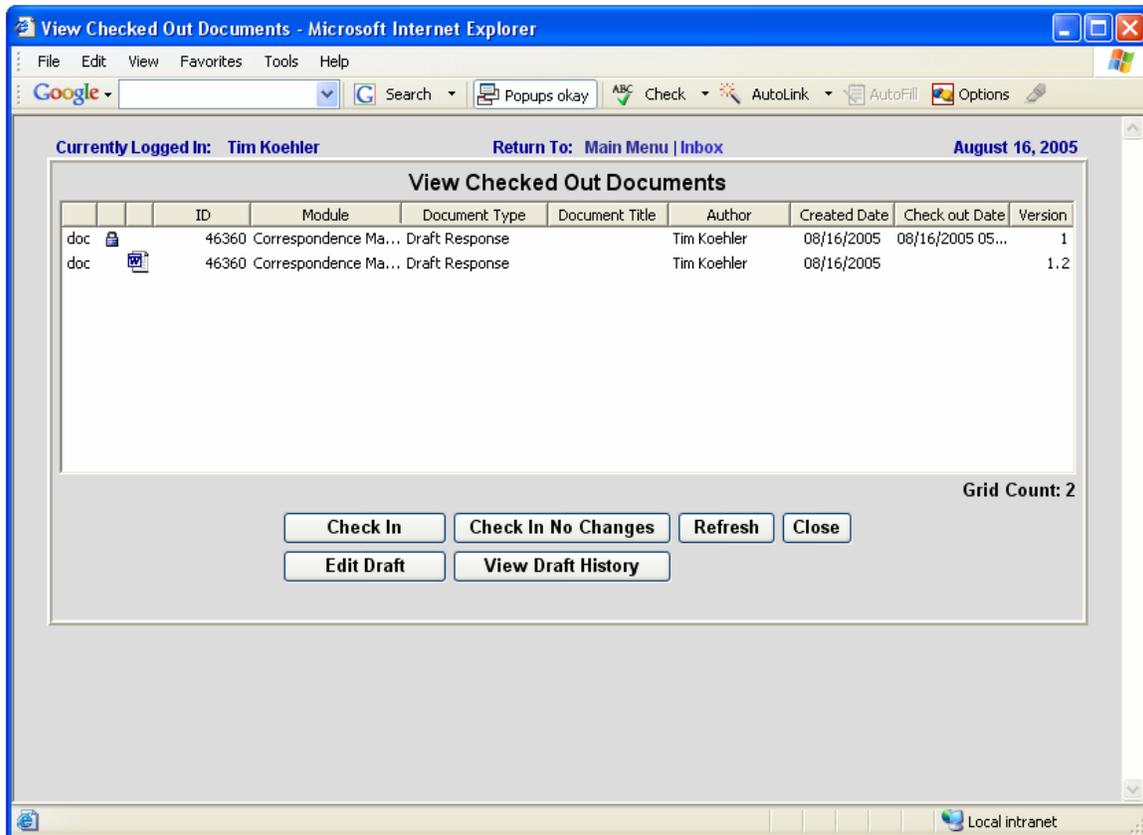


Figure 1: View Checked Out Documents Screen – With Add-In Installed

The View Checked Out Documents screen lists all checked out documents and drafts for the logged-in user. The in process document drafts are listed below the checked out documents. In the example in **Figure 1**, the checked out document is listed with version number 1, and the document draft is listed with version number 1.2. To resume work on the document, the user highlights the document or the draft and clicks the <Edit Draft> button.

The system will first check to see if the same document is saved on the user's hard drive. If it is and the local document is a more recent version than the last draft saved to the repository, the user will be informed and will be asked which version they would like to edit – the local copy or the draft from the repository as shown in **Figure 2**. The desired document is opened directly into Microsoft Word.

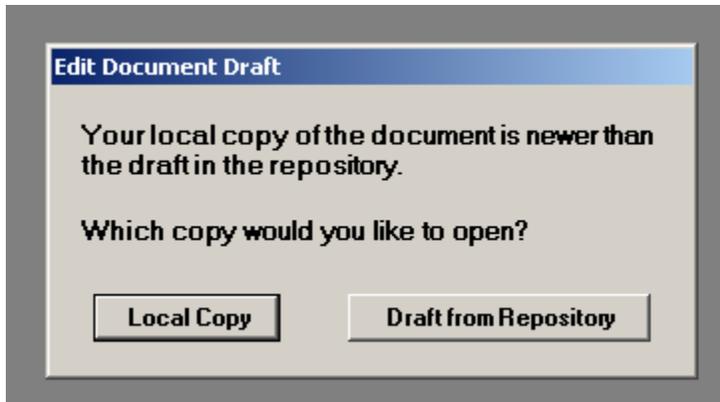


Figure 2: Edit Document Draft

A local copy would be more up-to-date if the user made changes and clicked the native Microsoft Word "Save" button after saving a draft to ECM. If the document is not on the user's hard drive, the draft document in the ECM repository is automatically displayed.

After making more changes, the user can save another draft by clicking "Save Draft to ECM" from the Microsoft Word File menu to save the latest changes. The document version number in the repository will now be 1.3. This is only visible in the View Checked Out Documents list. From the folder, users still only see version 1 of the document and see that it is checked out.

When finished making changes, the user clicks "Check In to ECM" from the File menu within Microsoft Word. The document is checked in to the system as version 2 and published to the folder. The document and draft is removed from the View Checked Out Documents list. At this point all users will see version 2 when the document is accessed from the folder screen.

View Draft History – ECM Word Add-in

The user can view a list of all document drafts that they created. These drafts are only visible to the author. To view previous drafts created, the author clicks the <View Draft History> button on the View Checked Out Documents screen. The Draft History screen is displayed as shown in **Figure 3**.

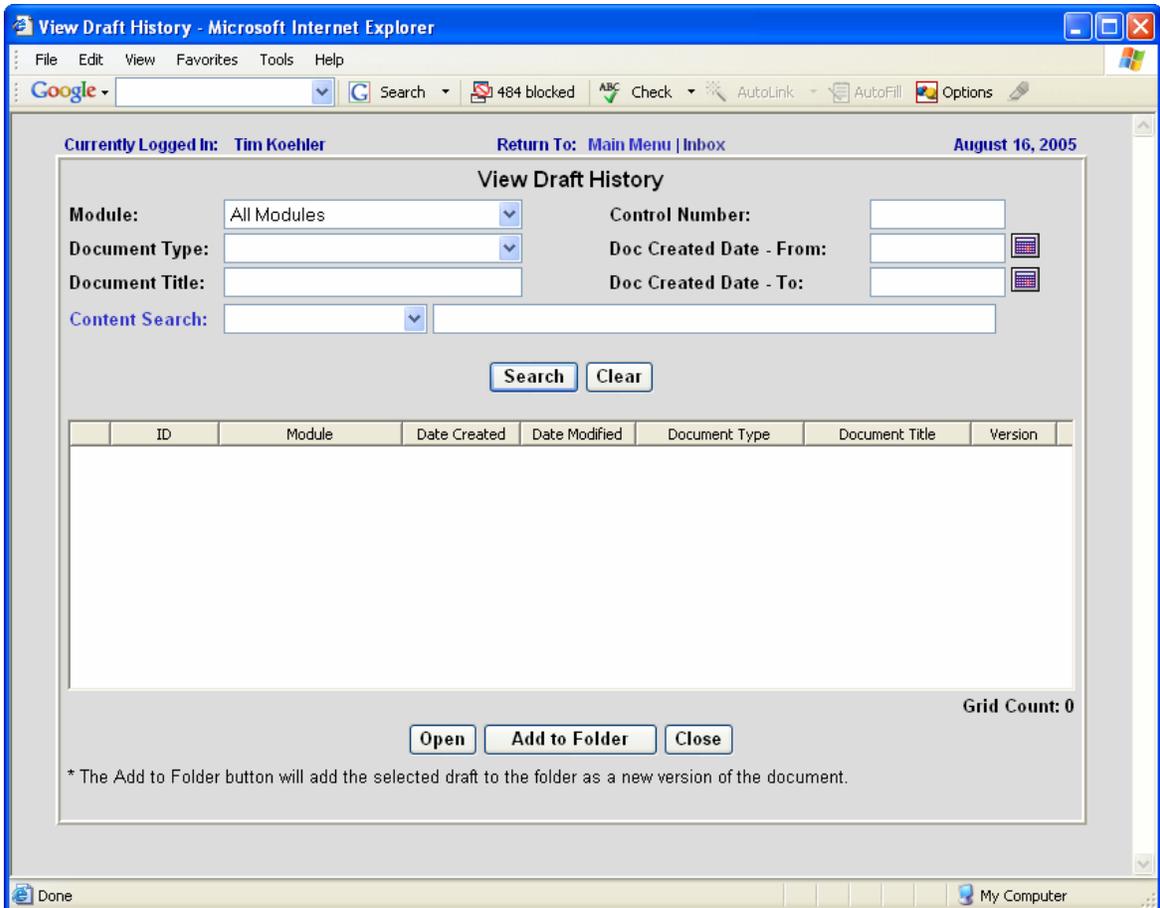


Figure 3: View Draft History Search Screen

The user enters a combination of criteria to locate the desired document draft. All versions of all drafts that match the search criteria are shown in the results list as shown in **Figure 4**.

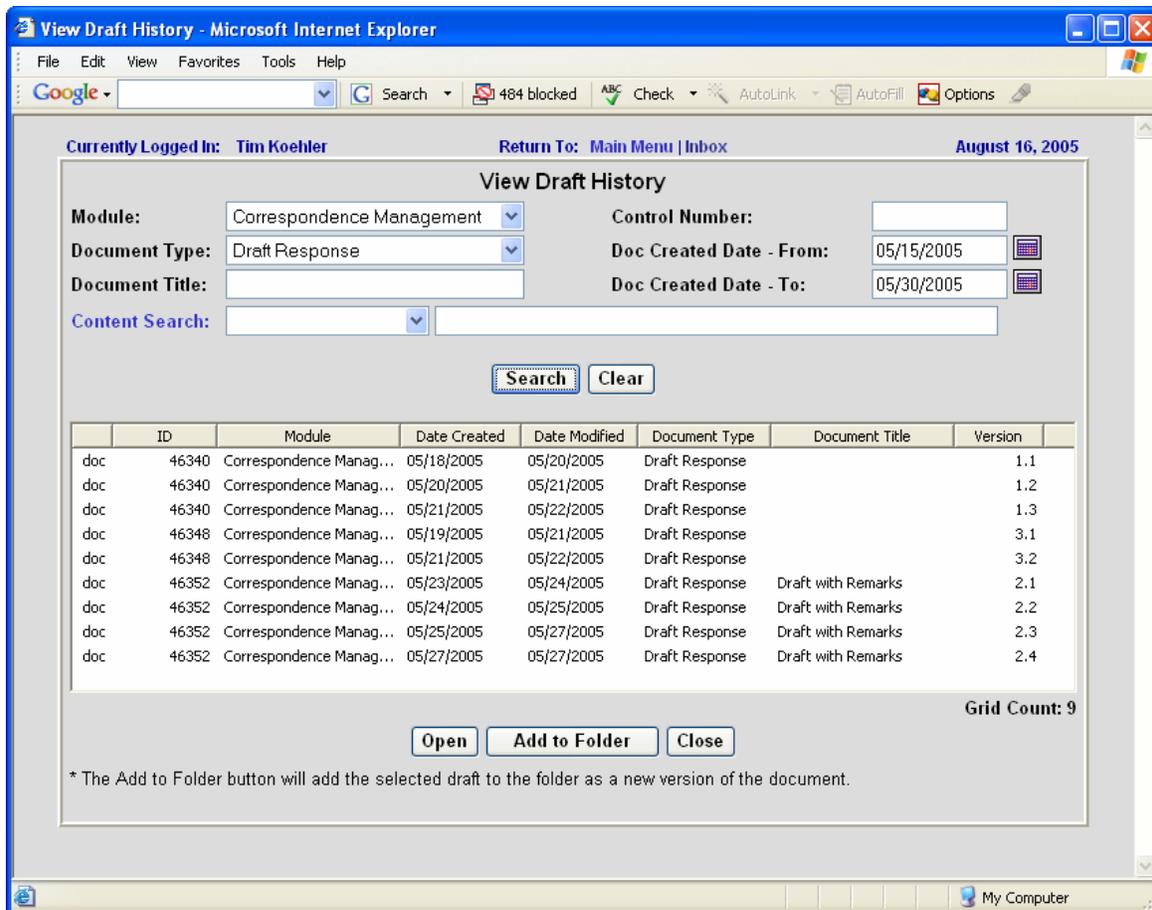


Figure 4: View Draft History - Results List

To open a draft, the user clicks the <Open> button. Additional drafts cannot be saved from this Draft History screen. Drafts of checked out documents can only be saved via the Microsoft Word application add-in.

If a mistake was made and a draft in history needs to be checked into the folder, the user can add it using this screen. To add a previous draft to the folder, the user selects the desired draft and clicks the <Add to Folder> button.

The selected draft is added as a new version of the document in the folder. Now when a user views the document in the folder, the displayed document will be the added draft. Regardless of the current version number of the document in the folder, the draft is added as a new version. If draft version 2.4 is added to the folder, and the latest version of the document is version 5, the draft version is added to the folder as version 6 of the document.

View Checked Out Documents with No Add-In Installed

The ability to store and edit drafts in the repository is only available to users with the Microsoft Word application add-in. For users who do not have the application add-in installed, this screen will simply provide a list of documents currently checked out. In this situation, the View Checked Out documents is shown in **Figure 5**.

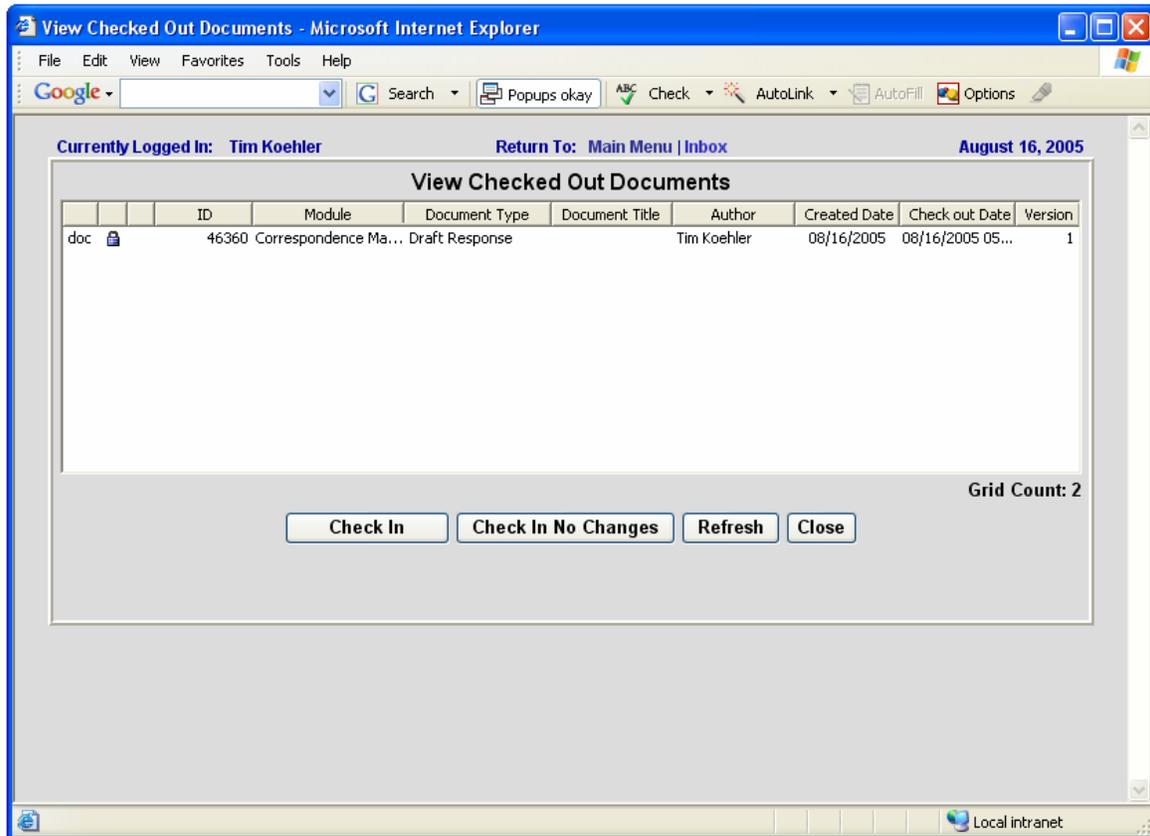


Figure 5: View Checked Out Documents - No Add-In

The <Edit Draft> and <View Draft History> buttons are not available. To edit a document, the user will locate the document on their local drive and then edit it. To check-in a document, the user can use this screen or the folder screen. The <Check In> and <Check In No Changes> buttons work the same way as on the Folder screen.

Since drafts can only be saved using the Microsoft Word application add-in, no draft history is available.

VIEW CHECKOUT DOCUMENTS

The View Checked Out Documents screen lists all checked out documents and drafts for the logged-in user. It is accessed through the Main Menu as shown in **Figure 6**.

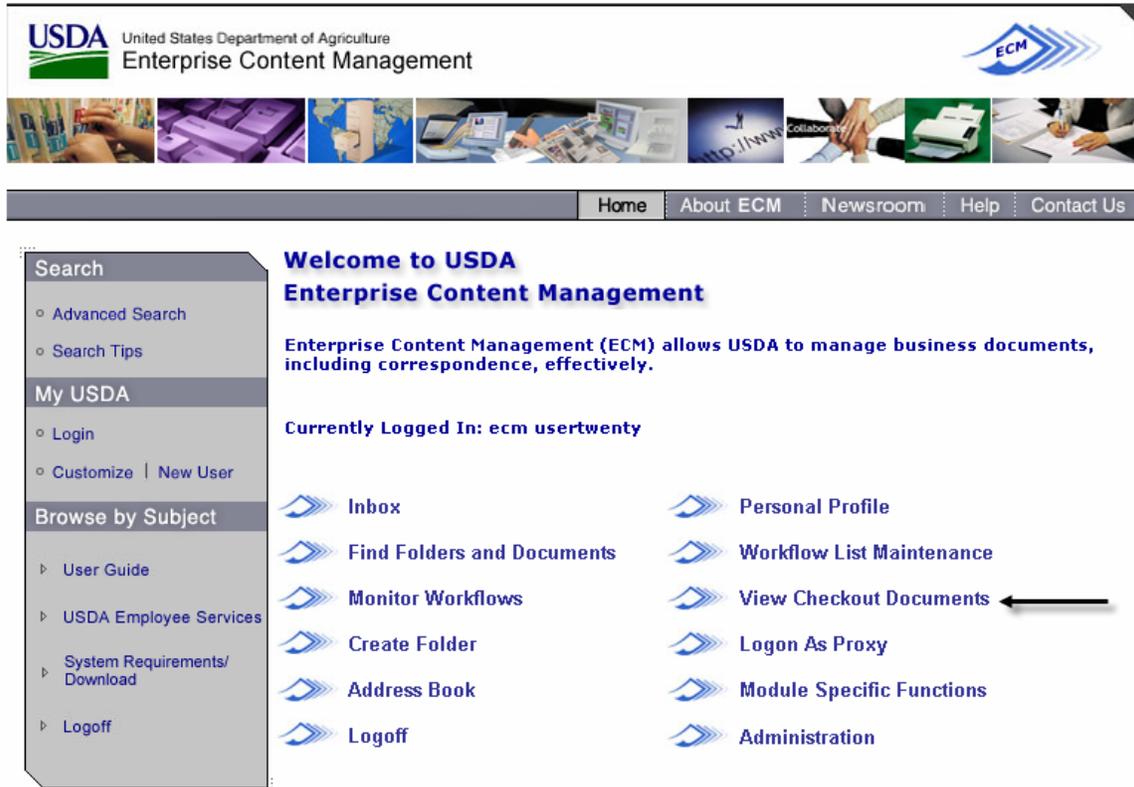


Figure 6: Main Menu - View Checkout Documents

If a user clicks on <View Checkout Documents and none are checked out by the user, the screen is displayed as shown in **Figure 7**.

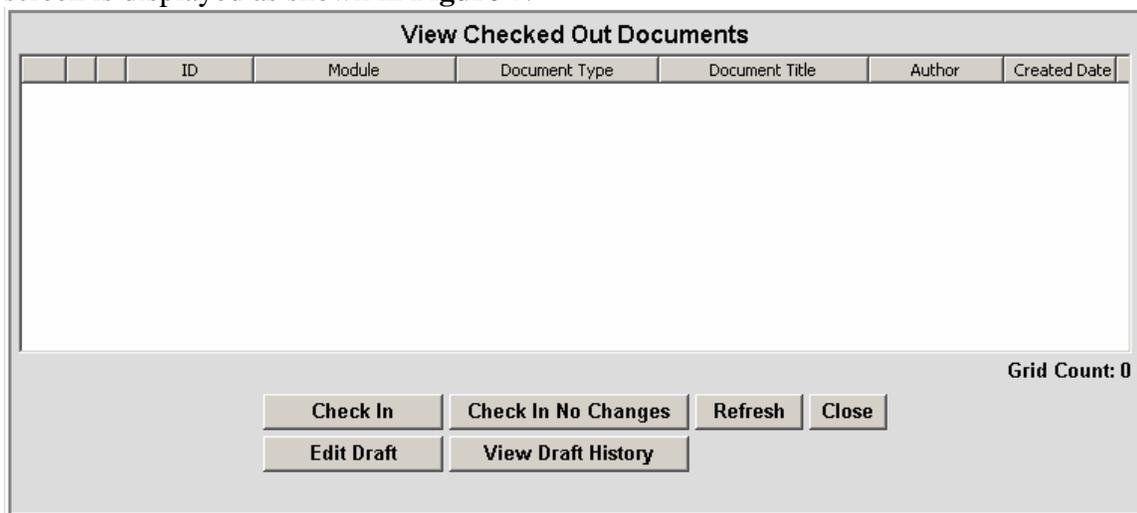


Figure 7: View Checkout Documents – No Documents

Figure 8 shows the View Checked Out Documents screen with a document and a draft.

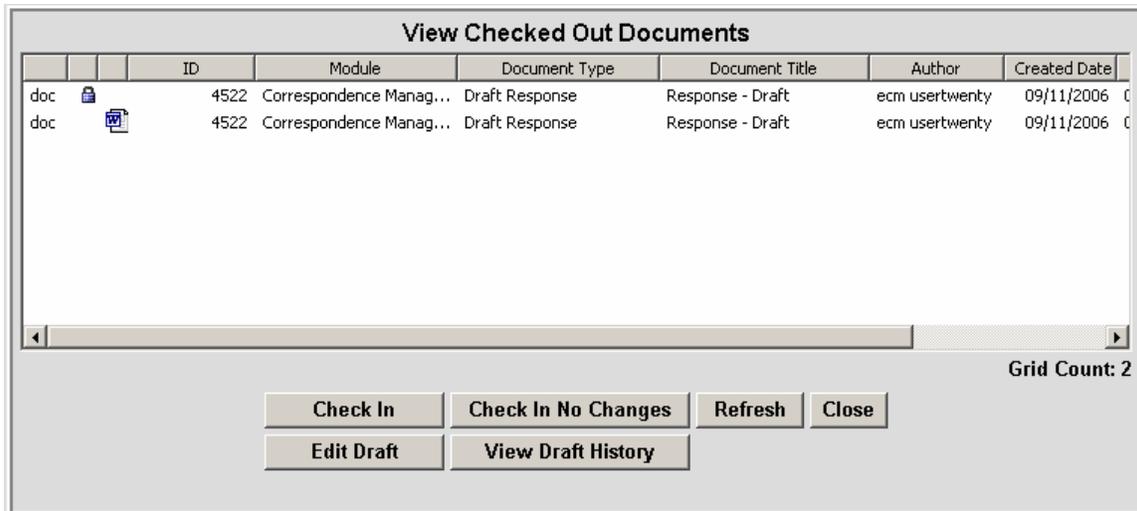


Figure 8: View Checkout Documents

CHECK IN

To check a document back in, the user clicks < Check In>. The 'Check in Document' screen is displayed as seen in **Figure 9**.



Figure 9: Check In Document

The user clicks <Browse> and locates the document to be checked in. The user highlights the document and clicks <Open> or doubleclicks the document to populate the File Location as shown in **Figures 10 and 11**.

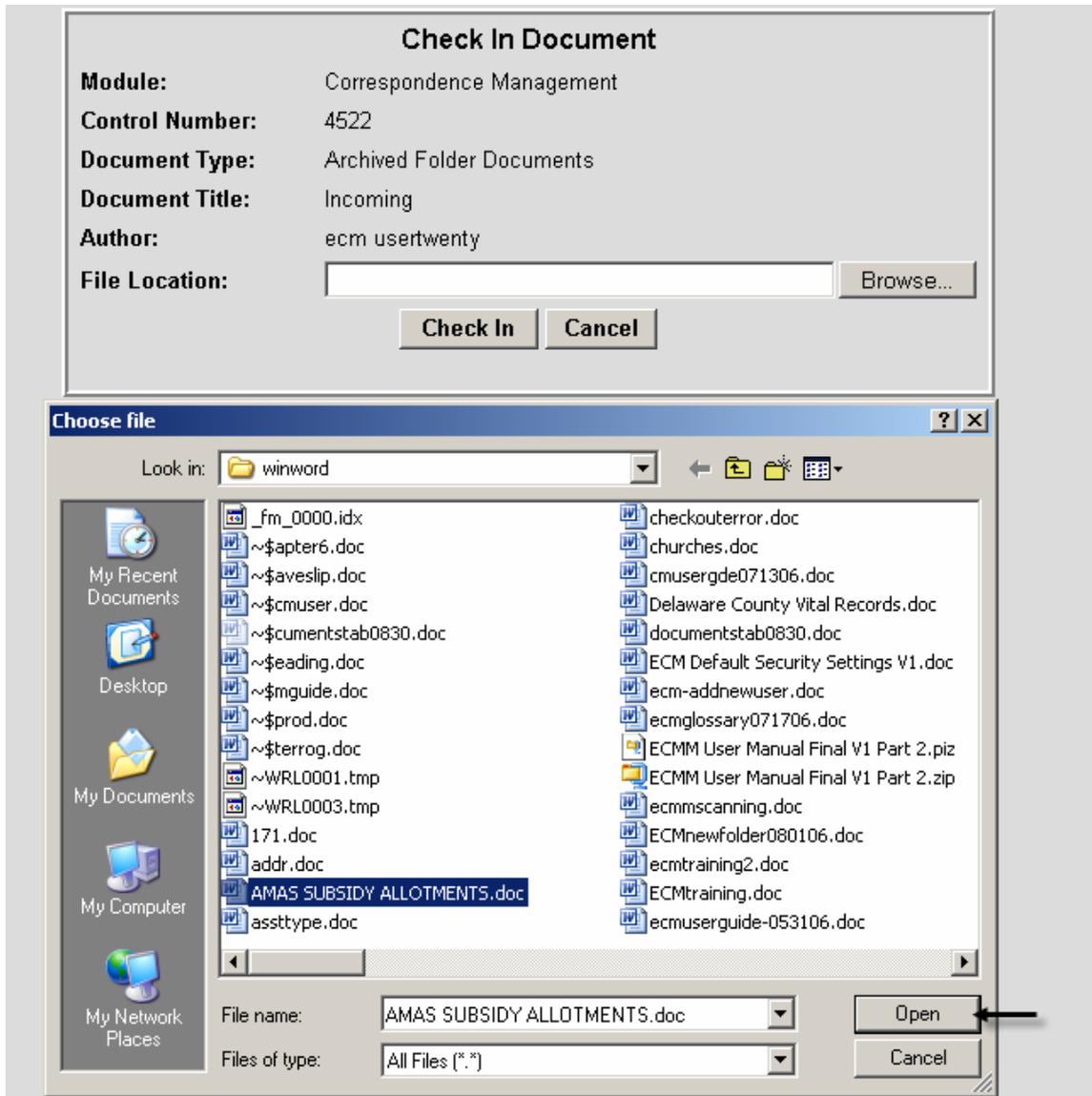


Figure 10: Check in Document - Locate Document

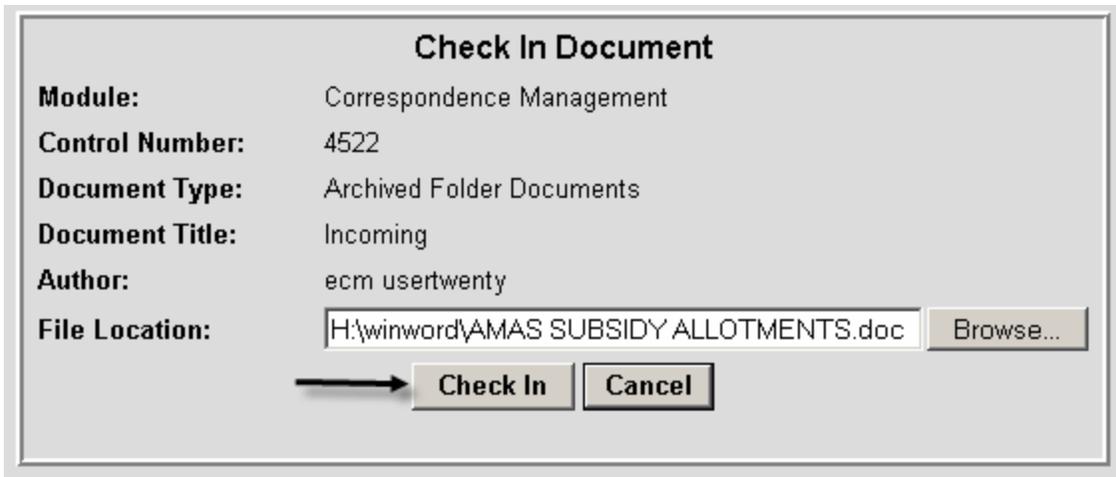


Figure 11: Check In Document

The system will compare the filename of the document being checked in with the filename when it was checked out. If the filename is not the same, a warning message will be displayed to the user as shown in **Figure 12**.

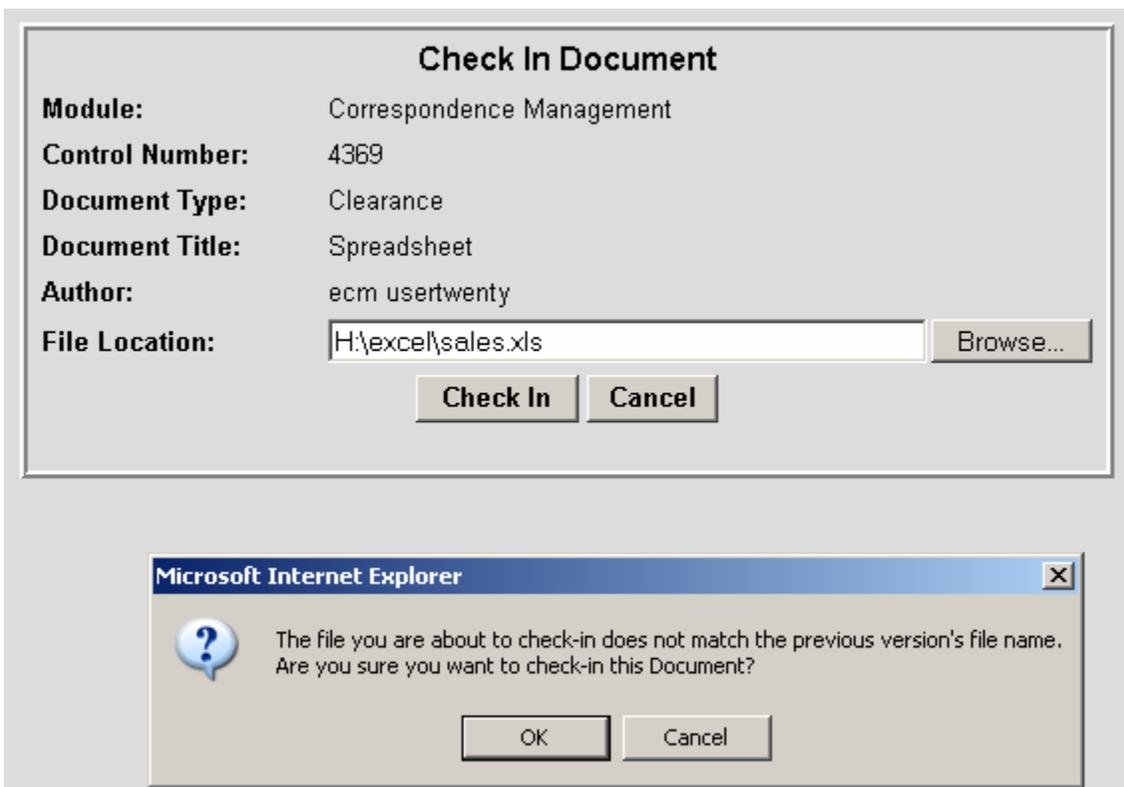


Figure 12: Check In Document – Different Document Name

After the document is checked back in, the user is returned to the 'View Checked Out Documents' screen as seen in **Figure 13**.

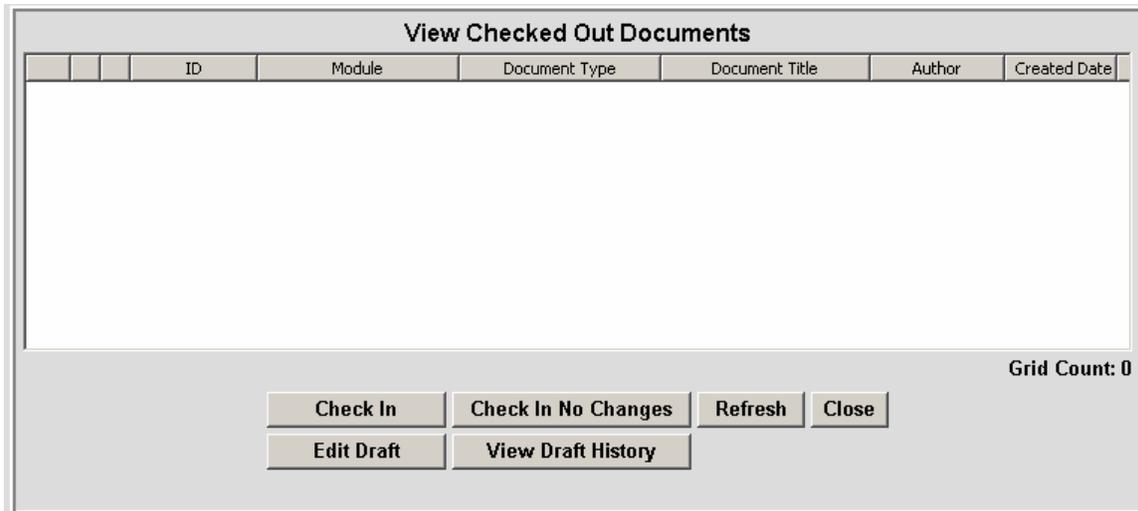


Figure 13: View Checked out Documents

EDIT DRAFT

To edit a checked out document, the user highlights the document to be edited on the 'View Check Out Documents' screen as shown in **Figure 14**.

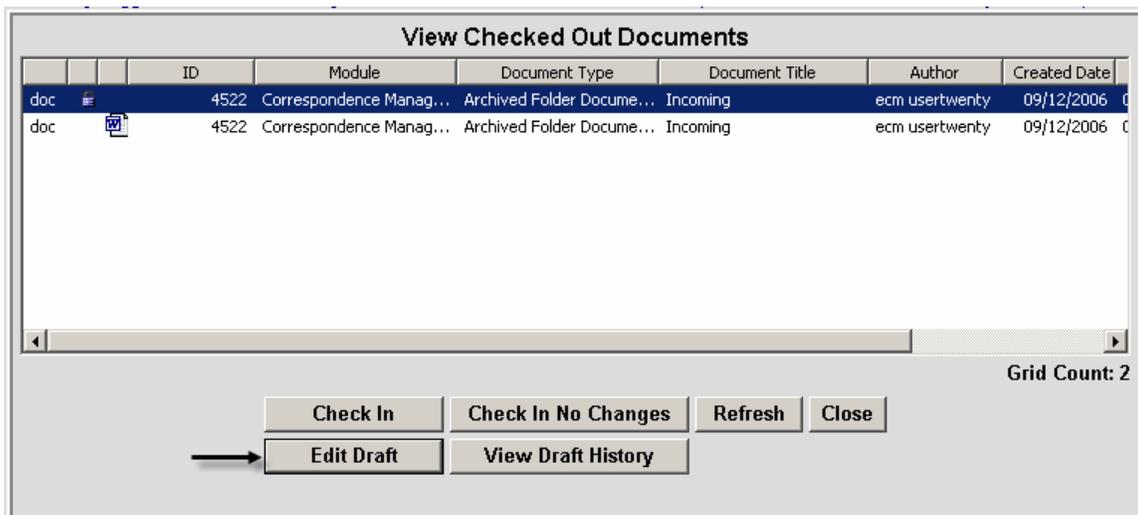


Figure 14: View Check Out Documents – Edit Draft

If the user has a newer version of the document on his desk top, the application will ask which copy to open through a pop-up as seen in **Figure 15**.

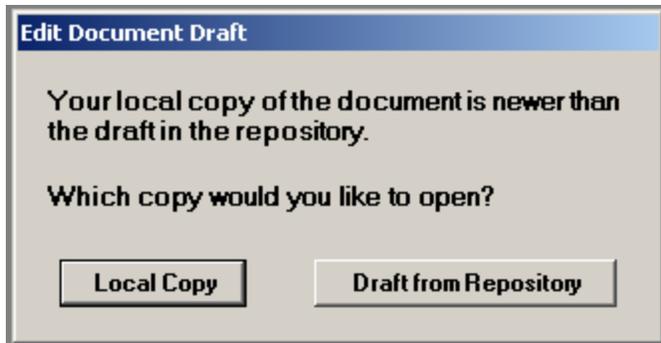


Figure 15: Edit Document Draft

After editing, the user can save a draft to ECM or check the document into ECM by clicking the <File> button and choosing the appropriate command as shown in **Figure 16**.

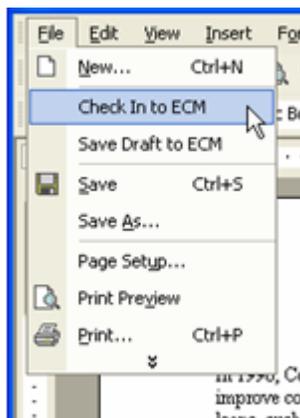


Figure 16: Edit Document Draft

CHECK IN NO CHANGES

Users can check in documents that they have checked out without changes by clicking the <Check In No Changes> button.

When a user checks in a document without changes, the document is checked in as a new version. The new version of the document will be identical to the previous version. All drafts saved while the document was checked out are retained in the draft history.

When a document is checked-in with no changes, an indicator (**Figure 17**) is shown in the lock column on the documents tab to indicate that the document was checked-in with no changes. This is the case every time a document is checked in with no changes even if drafts were created and saved.

	Document Type	Document Title	Author	Last Modified
doc	Archived Folder Documents	Incoming	ecm usertwenty	09/11/2006
doc	Draft Response	Response - Draft	ecm usertwenty	09/12/2006

Figure 17: Check In No Changes Indicator

VIEW DRAFT HISTORY

The user can view a list of all document drafts that they have created. These drafts are only visible to the author. To view previous drafts created, the author clicks the <View Draft History> button on the View Checked Out Documents screen. The Draft History screen is displayed as shown in **Figure 18**.

View Draft History - Microsoft Internet Explorer

Currently Logged In: **Tim Koehler** Return To: [Main Menu](#) | [Inbox](#) August 16, 2005

View Draft History

Module: **Control Number:**
Document Type: **Doc Created Date - From:**
Document Title: **Doc Created Date - To:**
Content Search:

ID	Module	Date Created	Date Modified	Document Type	Document Title	Version

Grid Count: 0

* The Add to Folder button will add the selected draft to the folder as a new version of the document.

Figure 18: View Draft History Search Screen

The user enters a combination of criteria to locate the desired document draft. All versions of all drafts that match the search criteria are displayed in the results list as shown in **Figure 19**.

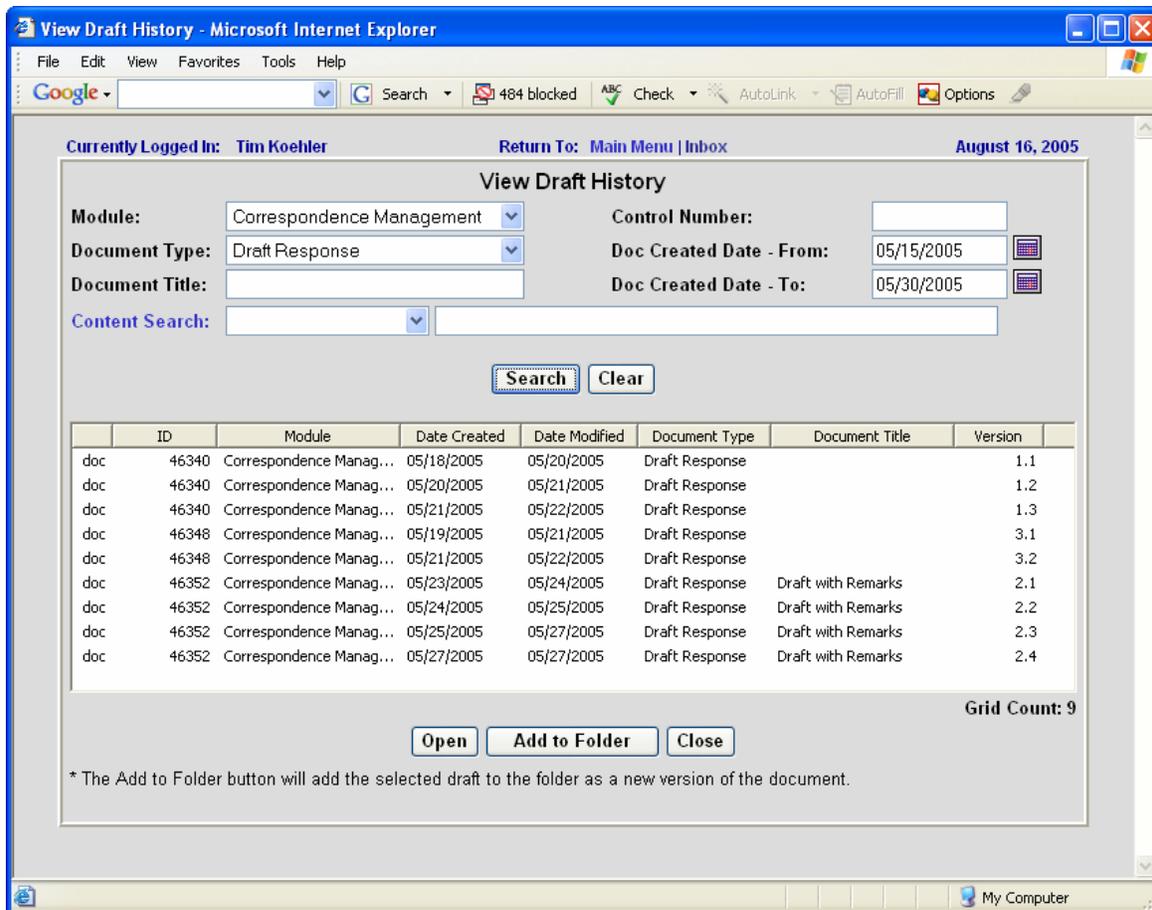


Figure 19: View Draft History - Results List

Open

To open a draft, the user clicks the <Open> button. Additional drafts cannot be saved from this Draft History screen. Drafts of checked out documents can only be saved via the Microsoft Word application add-in.

Add To Folder

If necessary, a draft can be added back into the folder by highlighting it and clicking <Add to Folder>. The draft is added as a new version of the document to the documents tab.

However, the document must have been checked back into the folder. If the user attempts to add a draft back to a folder and the document is still checked out, the error message in **Figure 20** is displayed.

View Draft History

Module: **Control Number:**
Document Type: **Doc Created Date - From:** 
Document Title: **Doc Created Date - To:** 
Content Search:

	ID	Module	Created Date	Date Mo...	Document Type	Document Title	Version
doc	4522	Correspondence Manag...	09/11/2006	09/11/2006	Draft Response	Response - Draft	1.1
doc	4522	Correspondence Manag...	09/11/2006	09/11/2006	Draft Response	Response - Draft	1.2

Microsoft Internet Explorer ✕

 The latest version of this document is checked out.

Showing 1 - 2 of 2

* The Add to Folder button will add the selected draft to the folder as a new version of the document.

Figure 20: View Draft History – Document Checked Out

Close

Clicking <Close> from the ‘View Draft History’ screen will return the user to the ‘View Checked Out Documents’ screen.

REFRESH

Clicking <Refresh> allows the user to have the screen updated to display any changes.

CLOSE

Clicking <Close> returns the user to the Main Menu.