# Editing a Document and Creating a Revision

Notes: Emails saved into EDRMS Content Manager <u>cannot</u> be edited.

Sometimes a new draft or update is created after a document has been added to the system. To keep the revision history, you can take the newly updated document from your LAN/Desktop and Drag & Drop it to create revisions of documents without the need to delete the document already filed in EDRMS Content Manager. (See To create a revision of a document using Drag & Drop instructions below).

Checking out a document to Offline Records for Editing:

1. Select the record you want to create a revision for.

2. From the **Home** Tab, select **Check Out** Or right click on record, **Check Out**.
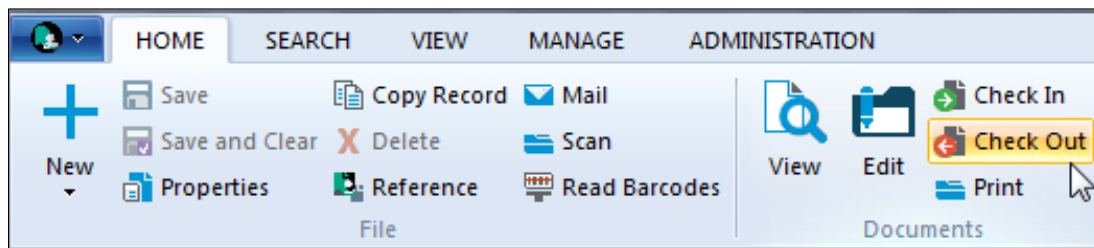

3. On the **Check Out Document** popup, select **Offline Records**. Offline Records are located in EDRMS Content Manager, whereas Local files are located on a LAN drive. We don't recommend removing documents from EDRMS to your LAN.
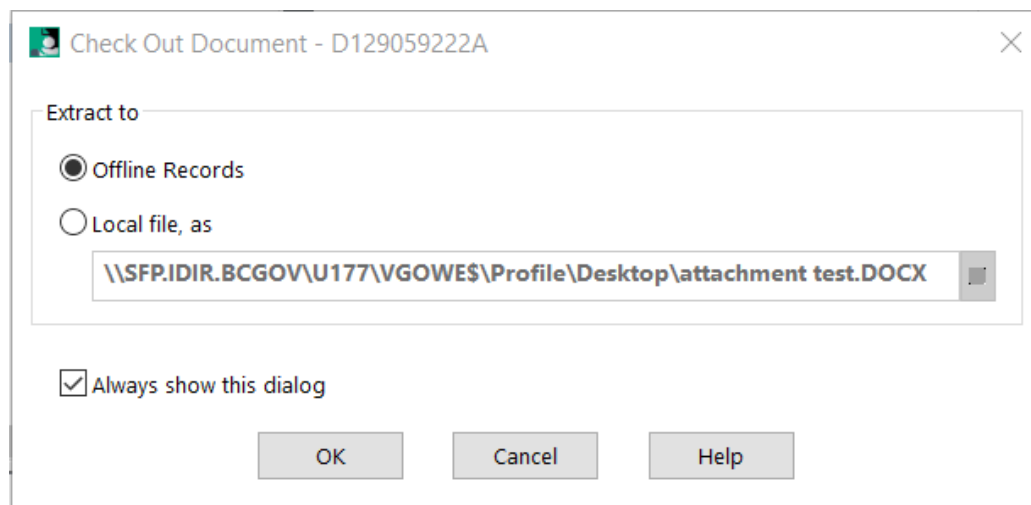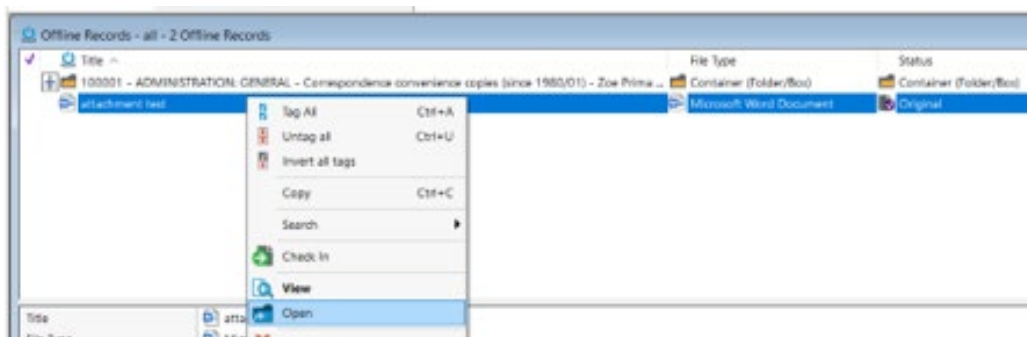

4. Click **OK**.

5. To open the document you have Checked Out, select **Offline Records** from your **Trays** icon in the **Shortcut Bar** on the left-hand side of the screen.
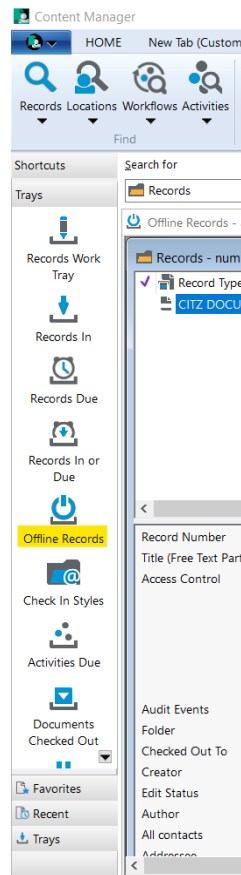

6. Select the record, right click, **Open**. The **Status** column will show as **Original**.

7. Make your updates as required, save and close the document.

8. In EDRMS Content Manager, go back to your **Offline records** and select the document which will now show under **Status** as **Modified**.

9. From the **Home** Tab, select **Check In** OR right click, **Check-In.**

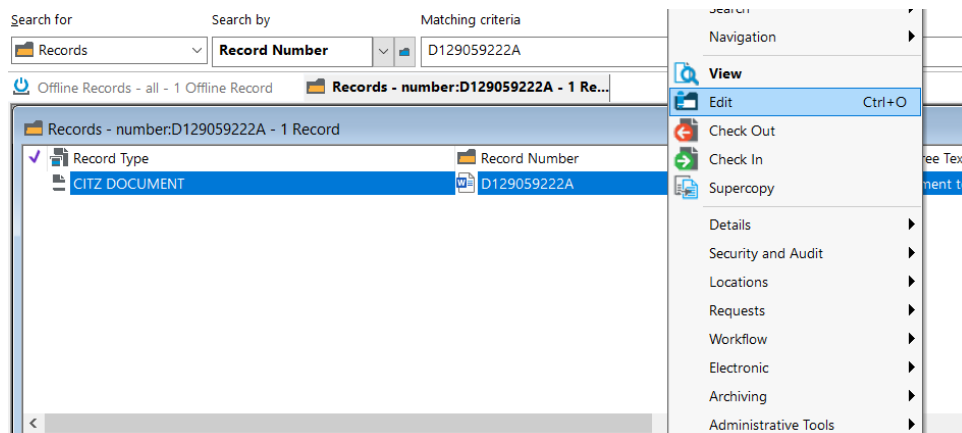10. On the **Check In** popup, select **Make a New Revision**.
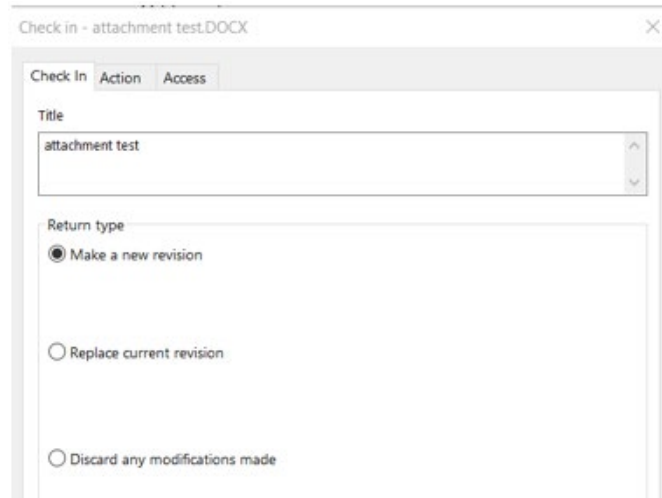
11. Click **OK**. The document revision will be checked in.

Quick Edit:

This opens the document for you to edit and is recommended for simple and quick edits, not when you might be working on the document for any longer than an hour.

1. Select the record you want to edit, then right click and select **Edit**.


2. The document opens for you to make the changes you need.

3. **Save** and close.

4. The document will check back in after 1-2 mins. **DO NOT** close the program until you see it is checked back in, **F5** will refresh the screen OR right click and select **Check In** to confirm it is done.

To create a revision of a document using Drag and Drop:

1. On the EDRMS Content Manager List Pane, make sure the document you want to update is highlighted.

2. **Drag** the updated document from your desktop or LAN drive and **drop** it on top of the highlighted version in EDRMS Content Manager.

3. On the **Check In** popup:

    a. Confirm that **Make a New Revision** is selected in the **Return type** area.
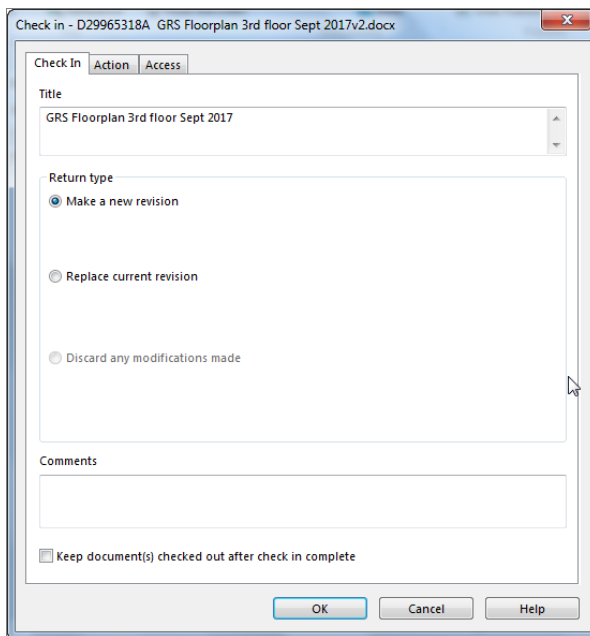
    b. Click **OK.** Your updated document will now be saved in EDRMS Content Manager.

Notes: To see if a document is Checked In, Checked out and to whom or how many revisions it had previously, you can add **Edit Status**, **Revision Number** and **Checked Out to** your **View Pane** for ease of reference and managing documents in the system.

For help with customizing your panes refer to **Tip 004: Customizing EDRMS Content Manager.**