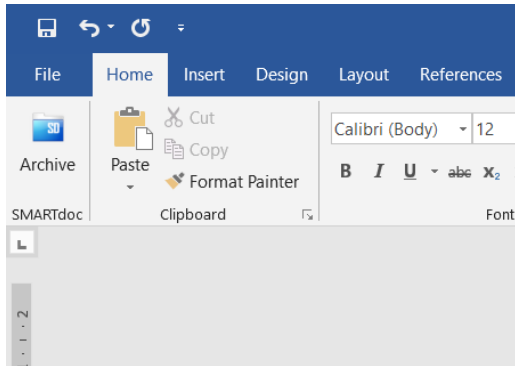


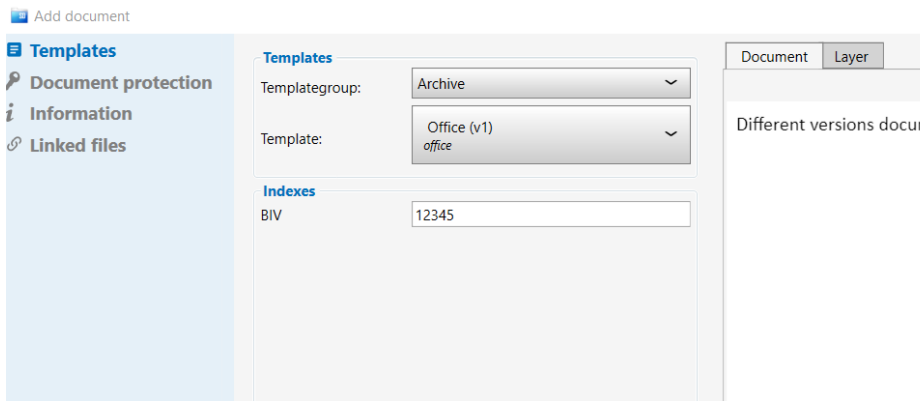
# SMARTdoc User Guide-Versioning

## STEP1: SAVE A WORD OR EXCEL DOCUMENT IN SMARTDOC

- Create a new document in an Office program.
- Save it using the “Archive” office connector button.



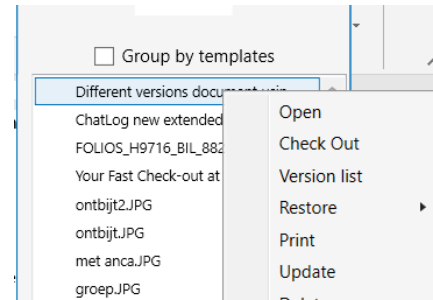
- Choose a name for the file and save it somewhere on your computer
- Using the pop-up watchfolder, fill in the right tags if needed



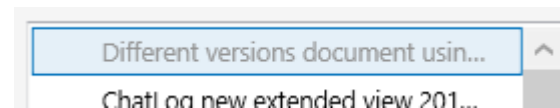
## STEP2: CHECK-OUT THE DOCUMENT

- Search for the archived document

- Right click the document and select “Check-out”



- The document is greyed out and you become the owner of the document



- If you don't check out, your changes are not saved

## STEP3: OPEN THE DOCUMENT

- Open the check-out document
- Work on it
- While working you can save using the normal Office save button

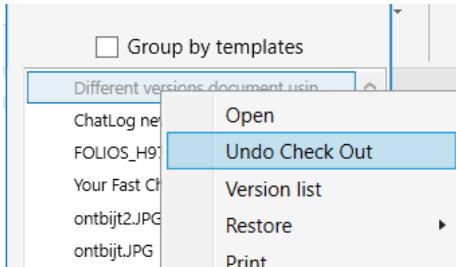
## STEP4: ARCHIVE THE NEW VERSION IN SMARTDOC

- Put the document back in SMARTdoc using the Office Connector
- Archive the document, the tags are re-used
- SMARTdoc automatically creates a new version of the document

# SMARTdoc User Guide-Versioning

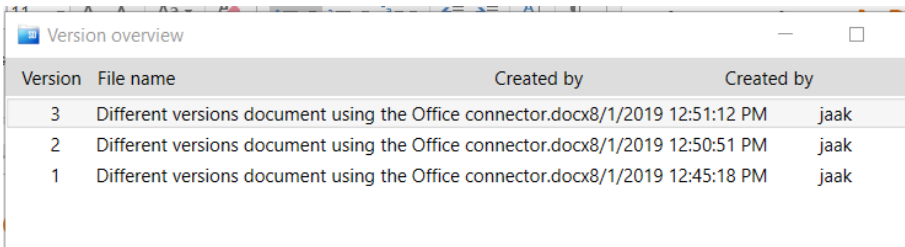
## STEP5: CHECK IN THE DOCUMENT

- To free the document for other users, you right click the document and choose 'Undo Check Out'



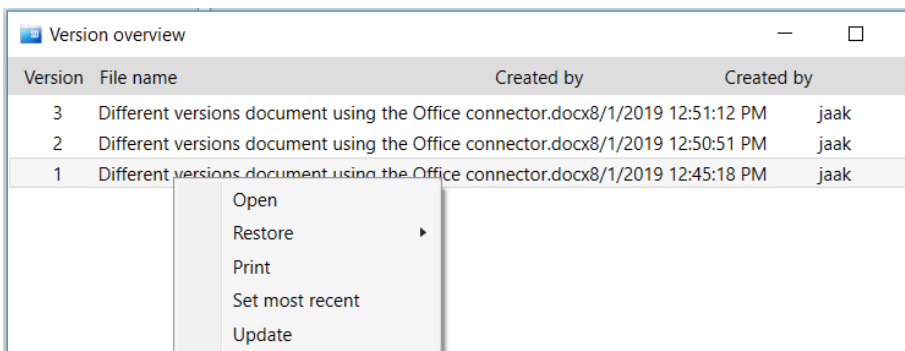
## STEP6: OVERVIEW OF ALL VERSIONS

- Right click the document and ask 'Version List'



Version	File name	Created by	Created by
3	Different versions document using the Office connector.docx8/1/2019 12:51:12 PM	jaak	
2	Different versions document using the Office connector.docx8/1/2019 12:50:51 PM	jaak	
1	Different versions document using the Office connector.docx8/1/2019 12:45:18 PM	jaak	

- You get an overview of all existing version of the selected document
- You can open each document from the list
- You can make any version the most recent, that is interesting when you made a mistake



Version	File name	Created by	Created by
3	Different versions document using the Office connector.docx8/1/2019 12:51:12 PM	jaak	
2	Different versions document using the Office connector.docx8/1/2019 12:50:51 PM	jaak	
1	Different versions document using the Office connector.docx8/1/2019 12:45:18 PM	jaak	

- Open
- Restore
- Print
- Set most recent
- Update

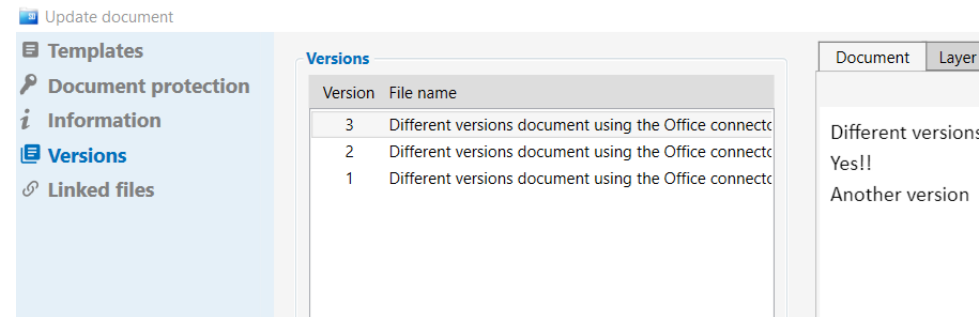
## EXTRA INFORMATION

### HOW TO CHECK THE NUMBER OF VERSIONS-1?

- Search for a document
- Right click the document
- Choose: "Version List"
- You get a list of all versions of the document, you can open them, decide another document to become the most recent
- You can even drag a new document in this window to create a new version

### HOW TO CHECK THE NUMBER OF VERSIONS-2?

- Search for a document
- Right click the document
- Choose: "Update"
- In the left bar of the update window, click the 'Versions' option

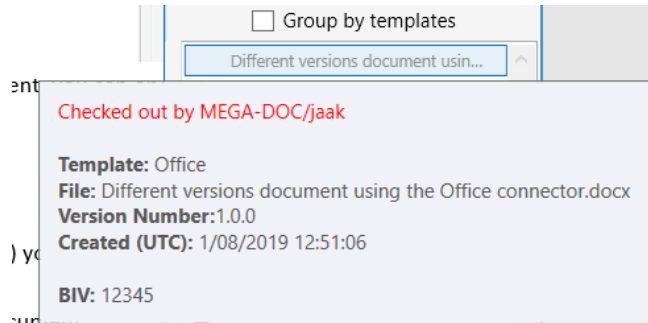


- You get a list of all existing versions of that document, you can open them, decide to promote an older version
- You can also add another document to the list

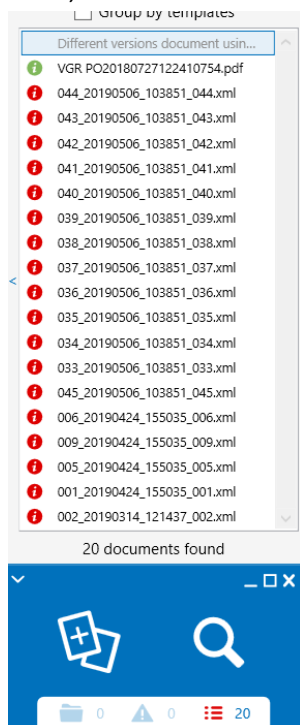
# SMARTdoc User Guide-Versioning

## CHECK OUT STATUS IS SHOWN AS A TASK

- When you hover over a checked out document, you see the message showing the document is checked out:



- In your task list (on the bottom right of SMARTdoc) you get a number for each document with a check-out; this number is added too your tasks, but has no bullet in front of it



- Clicking that number shows the check-out documents and your approvals.
- You can do this in the normal and in the extended view<sup>2</sup>
- In the extended view you have a column 'IsCheckedOut'

FileAuthor	Link	Layer	IsCheckedOut
Jacques Neyns	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
msg	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- You can also add the column 'CheckoutUser' to see who checked out the document

Link	Layer	IsCheckedOut	CheckoutUser
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MEGA-DOC/jaak
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	