

File Check-in and Check-out

- Navigate to the document needed:
 - Select Docs & Files from the Menu
 - Select the folder that the file is in.
- Once you've reached the file itself select the Check-Out icon (circled below in red).

The screenshot shows a document management interface. At the top, there's a header for "Documents & Files" with a folder path: "Folder: Documents & Files > Basic Needs, Economic Security & Child Safety Sub-Committee > Combined Matrices 5-08.doc". Below this, there are several icons, with the "Check-Out" icon (a document with a red checkmark) circled in red. A tooltip for the "Check-Out" icon is visible, containing the following text:

Check-Out
Check this document out. Use this option when making permanent revisions to the document. While the document is checked out by you, no other user will be able to check it out until you check it back in.

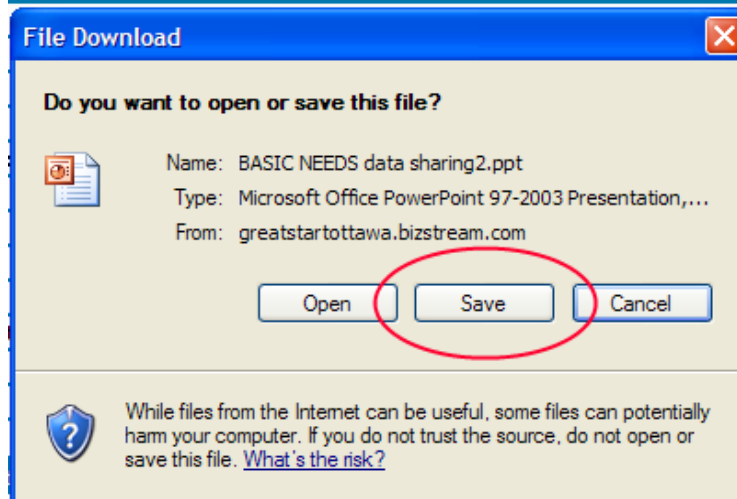
Below the tooltip is a table of document information:

Document Information	Click here to Collapse Document Information
Document Name:	5-08.doc
Document Path:	Basic Needs, Economic Security & Child Safety Sub-Committee\Combined Matrices
File Type:	Microsoft Word Document
File Size:	10 KB
Created On:	7/20/2008 2:23:00 PM
Last Modified:	7/28/2008 2:23:00 PM
Last Accessed:	8/23/2008 3:04:55 AM
Version:	001
Description:	5-08 Matrices
Keywords:	Matrices
Last Action:	by jshangle on 07/28/2008 @ 2:11 pm
Document Status:	Document is available for Check Out
Notification?:	You are NOT tracking this document.

Below the document information table is a "Document History" section:

Document History	Click here to Collapse Document History	
DM Actions: All Actions	Users: All Users	Edit Filter
Versions: All Versions	Dates: All Dates	
Document Added by jshangle	on 07/28/2008 @ 2:11 pm	Version: 001

- You will then be asked to open or save the document:
 - **IT IS CRITICAL TO REMEMBER WHEN CHECKING A FILE OUT YOU MUST SELECT SAVE!**



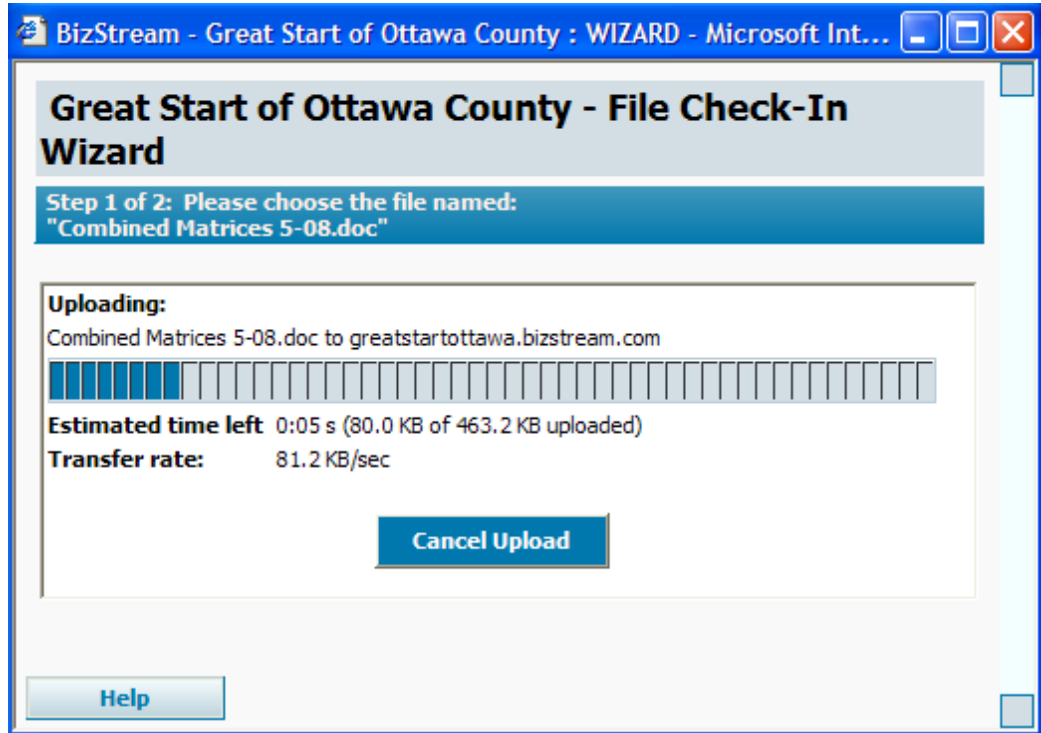
- You will need to remember where you saved the document to check it back in after editing.
- Edit the document as needed:
 - Open the document from the location where it was saved and make the changes needed.
 - There is no time limit for how long a file may be checked out, but remember while you have it checked out no one else can make changes to that document.
- When the edits are complete check the document back in:
 - again, navigate to the document in the portal.
 - The icon selection will look something like the image below.
 - Select the Check-In icon (circled below in red).



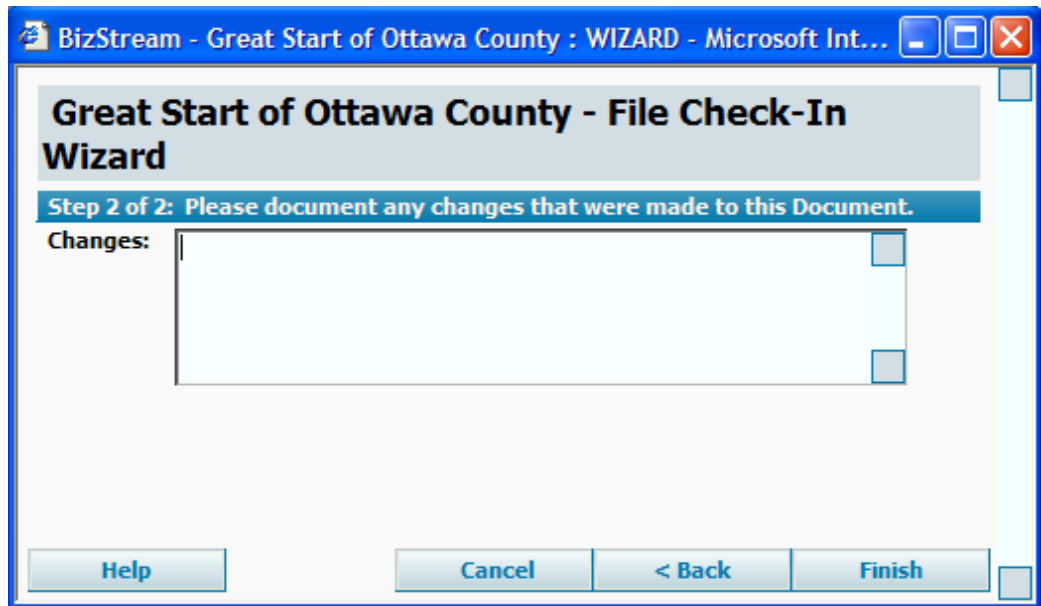
- Browse and select the modified file:
 - You will see the dialog below, click browse.
 - Navigate and select the file that had been downloaded in the previous step.
 - After the file has been located and selected, click the Next button.



- The file is uploaded to the system:
 - Wait for the up load to complete.



- Add comments and finalize the check-in



TIP:

If you've checked a document out for editing and cannot locate it, you can use the "get a copy" function to get a "fresh" copy from the site. This copy will not contain any changes you've made since the last check-out, but it will allow you to save the document to a memorable location so you can check it back in, through the standard check-in process.