

# Document Manager



## Versioning in Document Manager

Document Manager enables you to create multiple versions of the same document. You can do this for any document type you add to the database. However, only one version of a document can be the current version, which is not necessarily the highest-numbered version. The current version is the approved or official version, and will be the one displayed when searching.

To create a new version

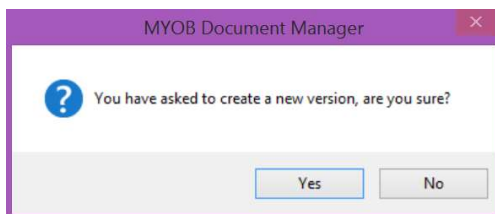
1. Use the **Find Documents** view or Documents tab on the relevant client to search for and find the required document.
2. Right-click on the document in the search results on the **Find Documents** view or the Documents tab.
3. Select Versions from the pop-up menu, or from the Single Document tasks on the left.

The Versioning tab with the selected document's reference number is displayed. All versions of the document stored in Document Manager are listed in the Versioning tab.

Document Id: 53      Title: Letter to confirm client email or letter preferred

Version	Status	Author	Date Created	Date Modified	Modified By	Checked Out...	Checked Out...	Checked Out...	Checked Out...	Sent Date
3	In Progress	Denise Avery	22/03/2017...	22/03/2017						
2	In Progress	Denise Avery	22/03/2017 2...	22/03/2017						
1	Complete	Denise Avery	23/03/2016 3...	23/03/2016	Denise Avery					

4. Right-click on one of the versions of the document in the Versioning tab.  
Select New version from the pop-up menu. (This can also be done from the Versioning menu on the Tasks panel on the left). You are prompted to confirm the action.



5. Click Yes to the prompt.  
A new version of the document appears at the top of the list in the Versioning tab. By default, this new version of the document is set as the current version, as indicated by Current Version icon, and is also set as being **In Progress**.

To set a document as the current version

1. Use the **Find Documents** view or Documents tab on the relevant page to search for and find the required document.
2. Right-click on the document in the search results on the page.
3. Select Versions from the pop-up menu.

The Versioning tab with the selected document's reference number is displayed. All versions of the document stored in Document Manager are listed in the Versioning tab.

4. Select the version of the document you wish to set as the current version and select **Set current version** from the Versioning menu in the Task Bar.

The selected document is set as the current version, which is indicated by the Current Version icon in the first column of the Versioning tab.

