Finalise Documents

Introduction

When no further edits / revisions should to be made to a document, its Edit Status should be set to Final. Documents should be made Final in instances when the document has been sent out externally, or has been approved. The finalised HPE Content Manager record is the Final version of the document.

Documents can be made Final on registration into Content Manager, or later after multiple revisions have been created.

Note: Only the Records Services team can 'un-finalise' a document, so only make a document Final when you are sure no further editing will be required. All emails are finalised by default when added to HPE Content Manager (because you cannot edit an email).

Procedure

Finalise a record already registered in Content Manager

1. Locate the document you wish to finalise. **Click its title** to select it (it'll be highlighted blue). In the properties pane, check that the Edit status is Checked In (you can't finalise it if it's Checked Out).

🗸 📲 ៅ Container	Record Number	Title	Date Registered	
💾 💼 2015/4791	🖬 D2017/103641	Adding a UofA grading s	cheme to an assign 29/06/2017 at 1:00	
<				Þ.
Record Type	🖺 DOC	UMENT		
Record Number	🗐 D201	17/103641		
Title	Addir	ng a UofA grading scheme to an a	ssignment	
Current Location	S In co	ntainer '2015/4791 (At home: Virt	ual)' since Thursday, 29 June 2017 at 1:00 PM	
Revision Number	1			
Edit Status	🖬 Chec	ked In		

2. On the HOME ribbon in the Document Management section, click "Final".

••	HOME	SEARC	H ACTIONS	FYB RESOURCE K	IT MANAGE												
G	€				🙀 🗘 🖏	abo				цщі		$\overline{\mathbf{r}}$	G				12
Go	Go	Properties	Container Records	Contained Records	Close Refresh Reloa	d Notes	Create Ma	I Favorites	Current	Retrieve -	Edit	Check	Check	Final	II Related	Relate	Revisions
Back	Forward		(+ Alternative)	(+ Alternative)	All Search		Reference		Location	Temporary		In	Out		Records		
			Quick Na	vigation			Record	ls Managem	ient				Docu	ment Man	agement		
Shortcut	ts	Searc	h for	Search by		Matching cri	teria							Final			
Recent			Records	 Record N 	lumber 🔽 🗖									Make Fin	nal		
	5	1	Records - numbe	er:d2017/103641 - 1	L R												
		-	Records - numb	er:d2017/103641 -	1 Record found												-
		1	📲 📹 Containe	r 🗖 Recor	rd Number	Title			D	ate Registere	ed						
	2		2015/47	01	7/103641	Adding	ofA grading sch		esian D	0/06/2017 -	+ 1.00						
Co	ontainers		취 ៅ Containe	r 🗖 Recor	rd Number		of A grading set			-							

3. In the 'Make Final' window select the 'Final' option and click OK.

Search for	Search by	Matching criteria	Make Final - D2017/103641	
necords 🔹	Record Number 🔹 🗖	d2017/103641	Make Final - D2017/103641	
decords - number:d2017/	103641 - 1 R			
Records - number:d2017,	/103641 - 1 Record found		This function allows you to finalize a record. An unfinalized record is a draft in progress. A finalized record cannot be	
🗸 膏 📹 Container	E Record Number	Title	routinely changed and can have no further revisions created.	A
2015/4791	D2017/103641	Adding a UofA grading s	Declare as:	
•			Draft/Working document	Þ
Record Type	E DOCUMENT	-	Final	A
Record Number D2017/103641		541	 Final and remove any previous revisions 	Ξ
Title	Title 🛛 🖬 Adding a UofA grading scheme to an a		Final and remove any previous revisions	
Current Location Sin Container '2015/4791 (At home: Vir Revision Number 1				
Edit Status	Checked In			-
II I I I II Properties	lotes Preview Previous Re	endition	OK Cancel Help	

The Edit Status of the document will be Finalised. This can be viewed in the record view pane at the bottom of screen. **No further edits can now be made to the document**.

E Records - number:d201	7/103641 - 1 Record found	d		
🗸 📲 ៅ Container	ៅ Record Number	Title	Date Registered	*
💾 📫 2015/4791	D2017/103641	Adding a UofA gradin	ng scheme to an assign 29/06/2017 at 1:00	
				-
•	-			Þ.
Record Type	🖺 DOCU	MENT		*
Record Number	D2017	/103641		
Title	Adding	g a UofA grading scheme to a	n assignment	
Current Location	S In cont	tainer '2015/4791 (At home: \	Virtual)' since Thursday, 29 June 2017 at 1:00 PM	
Revision Number	1			
Edit Status	🕅 Finalize	ed		-
IA A > > Properties	Notes Preview Previous	Rendition		

Make Final upon registration (excluding documents registered via Office integration)

1. When completing the Document Registration Form, **select Declare as Final tick box** to finalise on registration.

New DOCUM	ENT				
Cont	acts	Title No	tes		Provenance
General	Display and/or	Modify Notes	Record A	Actions	Related Records
Title (Free Tex	t Part)				
MULC Work	ing Group Meeting	g Minutes - 12 J	uly 2017		۶a
File Number			Document Mo	de	
2015/4791		-	Internal		
Document Da	ite		Document Cat	tegory	
13/07/2017	10:41:23	AM 🗟	Minutes		
Author		_	Addressee		
Potter, Ale	kandra (Miss)	▼ 🛋			-
Current Local	tion				
<at home=""></at>	2015/4791				
Electronic	Only?				
	(always tick box if	electronic only)			
	(ОК	Car	ncel	Help

Note: Documents added to HPE Content Manager directly using Office Integration (Word, Excel, PowerPoint) cannot be finalised upon creation. After adding, open Content Manager, and finalise using the Final button on the Home ribbon.

Contact Us

For further support or questions, please contact Records Services on 8313 5334 or records.services@adelaide.edu.au