Amending & Editing Documents

Introduction

The HPE Content Manager Web Client allows you to connect to the University's records system using a web browser. It offers a streamlined interface that includes the most frequently used HPRM features.

Processes for editing documents in the Web Client are similar to the full HPE Content Manager system, but with some variations to the Check In process.

Note: Chrome and Firefox are recommended browsers. Internet Explorer may not provide an optimal user experience with the Web Client.
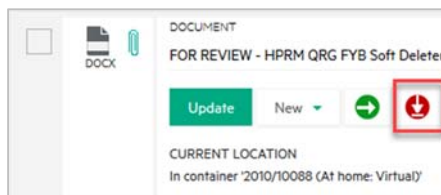
Procedure

Amending Document Properties

1. To update properties of a record, click **Update**.
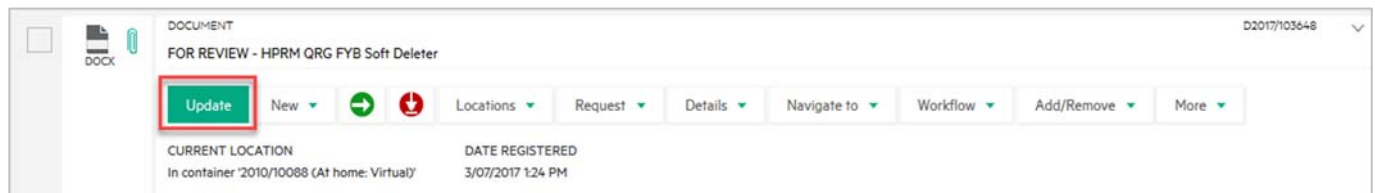
2. The document registration form will display, and you can amend record information, eg title, category, make Final etc.
3. Click **Save** when you've finished making changes.

Checking out to Edit

1. To edit the document, select **Check Out.**

2. A pop up will appear prompting you to either Open or Save the document to a location. Choose **Save** and choose a location to save the document (e.g. your desktop or C: drive).
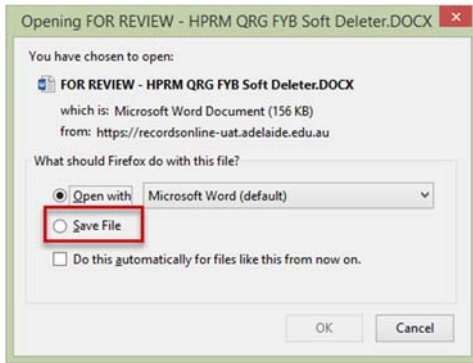
Note: If you choose Open, the record will open in read only format; you will need to save it in order to make changes.

3. Make changes as required, and **save the document** in its native application (i.e. Word, Excel etc), **then close** it.

Checking in an Edited Document

An edited document needs to be attached as a **new revision** and **Checked In**. The Web Client does not integrate with Microsoft Office applications and automatically check back in edited documents upon closing, as in the full Content Manager software.
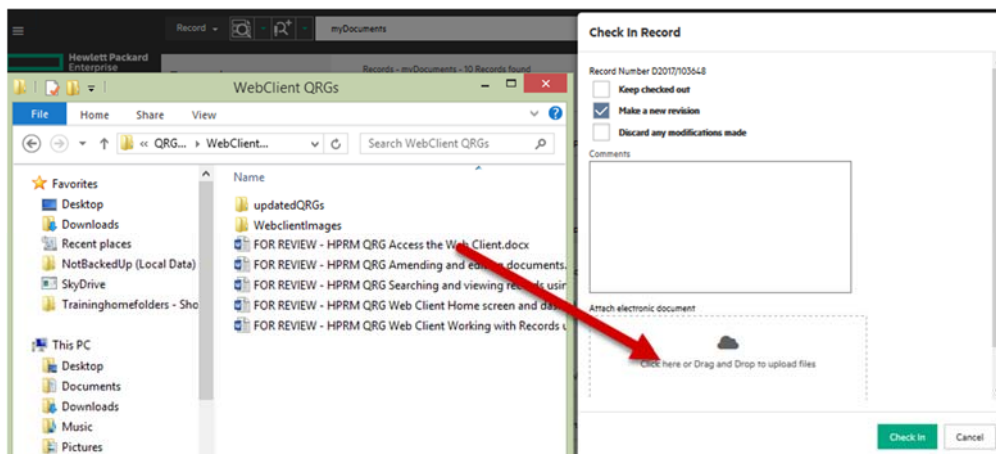
1. In the Web Client Interface, expand the record information, and click **Check In.**
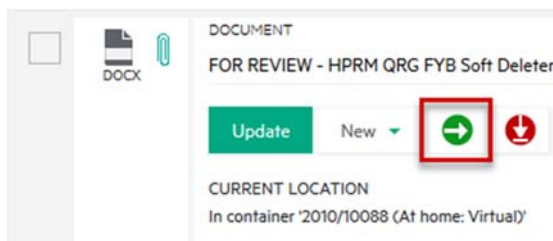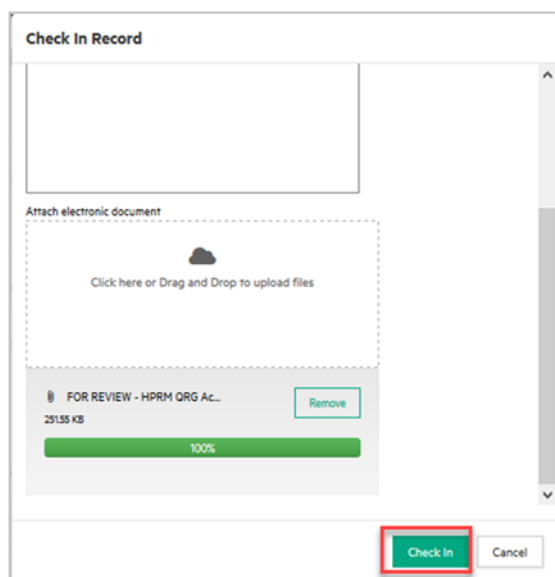

A Check-In Record pop-up appears.
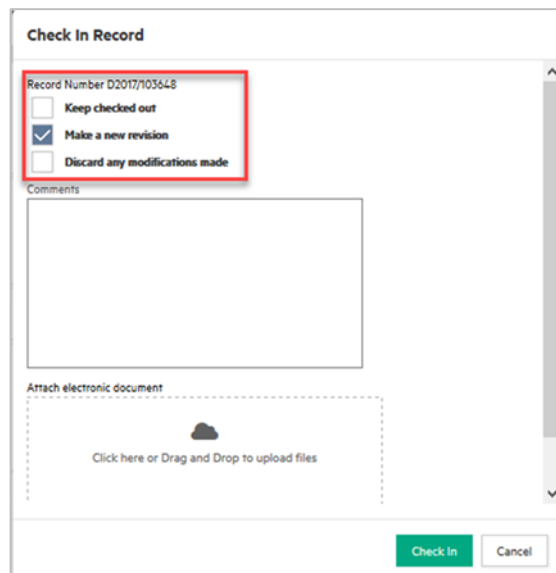
2. Select one of the options to **Keep Checked Out** or **Make a New Revision**.

3. Open a **Windows Explorer** window and navigate to your saved version of the edited document. Drag and drop it into the 'Drag and Drop here' box in the Web Client interface.

You'll see the attachment appear.

4. Click **Check In.** Your edited version of the document will appear as a new revision.

Contact Us

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