eICS™ Quick Reference Guide

Check Out, Discard, and Check In Files

Overview

To manage files effectively, it is important to use the check-out and check-in process. This process is essentially the same whether you are accessing a document from the **Incident Dashboard** > **Files** or editing plan documents through **Planning** > **Library**.

Checking out a document lets other people know the document is in use by putting a virtual lock on the document. Other people can still view the document and, if necessary, they can discard your check-out to open and edit the last saved version. Also, you can discard a file you checked out if you do not want to replace the current document with the updated version.

If you have Microsoft® Office® 2010 or later on your computer and are using Internet Explorer®, Firefox®, Firefox® ESR, Chrome® or Safari® to access eICS, when you check out a Microsoft Office document the browser will request permission to open the document using the relevant Microsoft Office application.

> **Note**: The check-out/check-in process for Microsoft Office documents may vary slightly if you have more than one document checked out at the same time. For instance, you may be required to save the document to your computer and check it in from there.

After checking out, editing, and saving a document, you want to check it in to indicate that your edits are complete and the document is ready for use by others. The check-in process is slightly different if the document was opened and edited using Microsoft Office.

To check out and edit a Microsoft Office document

1. Through **Incident Dashboard** > **Files**, locate and click the file you want to edit.
2. On the right, in the **General** drawer, click **Check Out**. Your browser opens a window requesting permission to open the document with the Microsoft Office application.
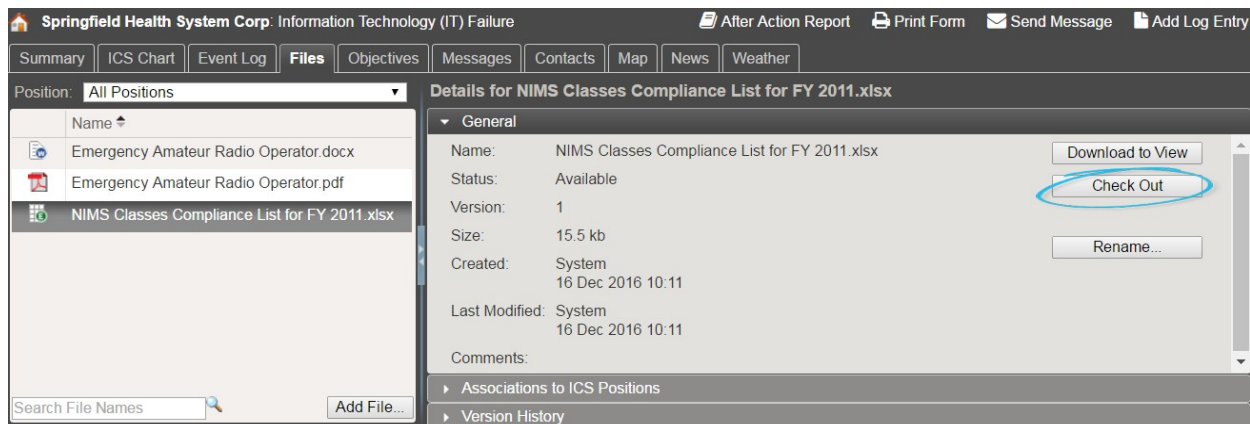
To check out and edit a Microsoft Office document (continued)

3. On the browser window, click **Open**, **Allow**, **Launch**, or **OK** (the browser message and button text are different depending on which browser you are using) to open the document.

   Note: The first time you check out and access a Microsoft Office document in each session, an eICS Login window opens. Enter your login credentials to verify access.
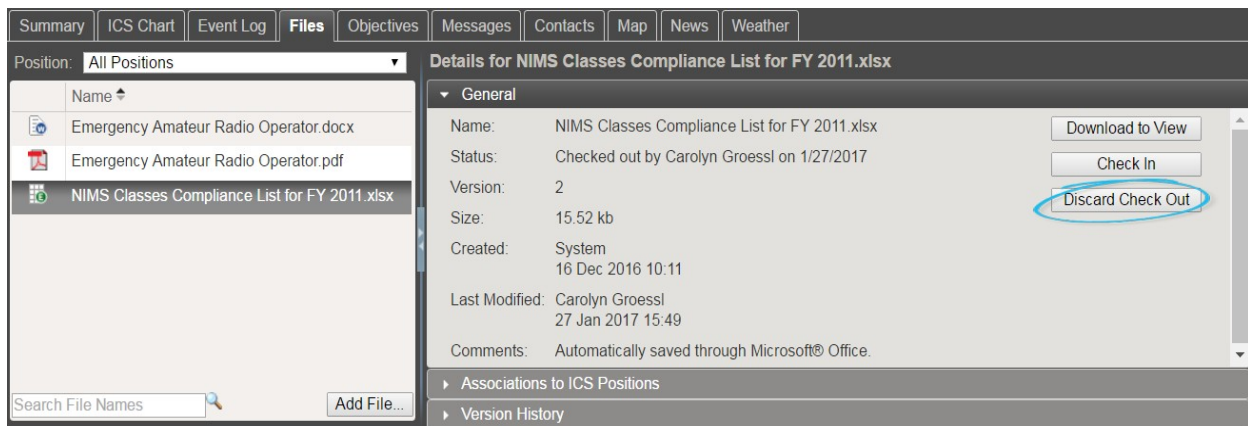
4. In the Microsoft Office application, edit, save, and close the document. Saving the document automatically creates a version of the document in eICS, but the document still needs to be checked in.

5. When ready, continue with the procedure to check in a Microsoft Office document.

To check out and edit other types of documents

1. Through **Incident Dashboard** > **Files**, locate and click the file you want to edit.

2. On the right, in the **General** drawer, click **Check Out**. The document is downloaded and opened with the relevant application on your computer.

3. In the application, edit, save, and close the document. Saving the document replaces the original file in your *Downloads* folder or according to your browser settings. The document still needs to be checked in.

4. When ready, continue with the procedure to check in other types of documents.

To discard a checked-out document

1. Through **Incident Dashboard** > **Files**, locate and click the file you checked out.

2. On the right, in the **General** drawer, click **Discard Check Out**. The page refreshes to show that the document is available and the **Version** count reverts to the previous number.
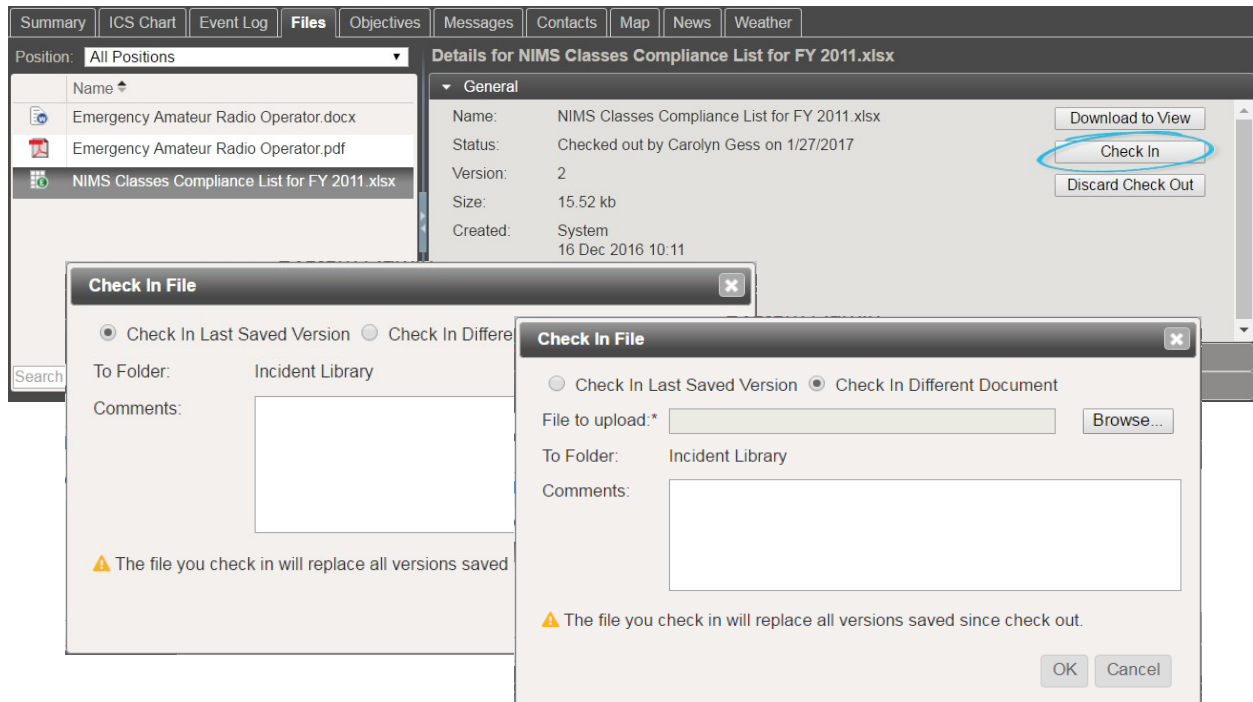
To check in a Microsoft Office document

When editing a Microsoft Office document, every time you **Save** the document creates a temporary version that is stored in the **Version History**. Checking in the document creates a new version that replaces the temporary versions.

1. Through **Incident Dashboard** > **Files**, locate and click the file you checked out and edited.

2. On the right, in the **General** drawer, click **Check In**. The *Check In File* window opens.

3. Take one of these actions.

If you want to check in…	Then…
A document you just finished editing with a Microsoft Office application,	Click Check In Last Saved Version.
A different version of the document or a document saved on your computer,	- Click Check In Different Document, - To the right of the File to upload field, click Browse. Your browser's file navigation window opens. - Navigate to locate and select the file you want to upload. - Click Open.

4. For **Comments**, enter notes or details about your edits.

5. Click **OK**. The document is checked in and your edited version is available to other users.

To check in other types of documents

1. Through **Incident Dashboard** > **Files**, locate and click the file you checked out and edited.
2. On the right, in the **General** drawer, click **Check In**. The *Check In File* window opens.
3. To the right of the *File to upload* field, click **Browse**. Your browser's file navigation window opens.
4. Navigate to locate and select the file you want to upload.
5. Click **Open**.
6. For **Comments**, enter notes or details about your edits.
7. Click **OK**. The document is checked in and your edited version is available to other users.

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