

Editing Documents

1. In **HPE Records Manager** search or navigate to a document.
2. Highlight the document and select **Edit icon** on the toolbar. 
3. The document will open in the authoring application (e.g. MS Word), and will be checked out to you. Make the relevant changes to the document.
4. Select **Save** on the Word Ribbon (not Save As), and close the application.

Revisions in HPE Records Manager

Revisions are a modified copy of a document. There can be multiple revisions attached to a document. Each time a document is edited a new revision is created. All revisions can be accessed through HP Records Manager.

[Preview Previous Revision](#)

1. Highlight the document, right-click and select **Properties**. 
2. In the Properties window select the **Revisions** Tab to view the list of previous document revisions.
3. Right-click on a revision and select **View**.

[Promoting Revision](#)

1. Right-click on the document and select **Electronic > Promote Revision**.
2. Highlight the revision you want to promote and select **OK**.

This is now the most current Revision of the document.

Finalising Documents

1. In **HPE Records Manager** search or navigate to a document.
2. Right-click on the document and select **Electronic > Final**. 
3. Select **Final** in the **Make Final** window, then select **OK**.

The document is now finalised and cannot be edited.

Creating New Versions

1. In **HPE Records Manager**: Search or navigate to a document.
2. Right-click on the document and select **New > New Version**. 
3. In the **Create New Version** window un-select any fields that are not required.

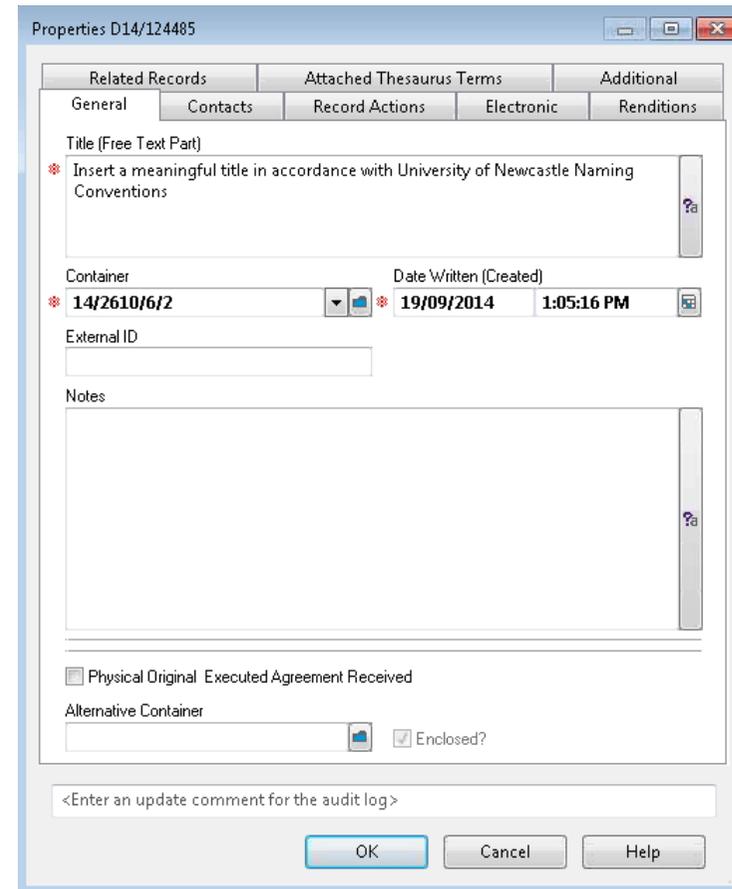
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4. Select **OK** to create the new version of the document.

The previous version of the document will be finalised & no further changes can be made to it.

Document Properties

1. In **HPE Records Manager** search or navigate to a document.
2. Highlight the document and select **View / Edit Record Properties icon** on the Toolbar.



[Changing Title](#)

Delete the content in the **Title (Free text Part)** field and enter a new Title. Select **OK**

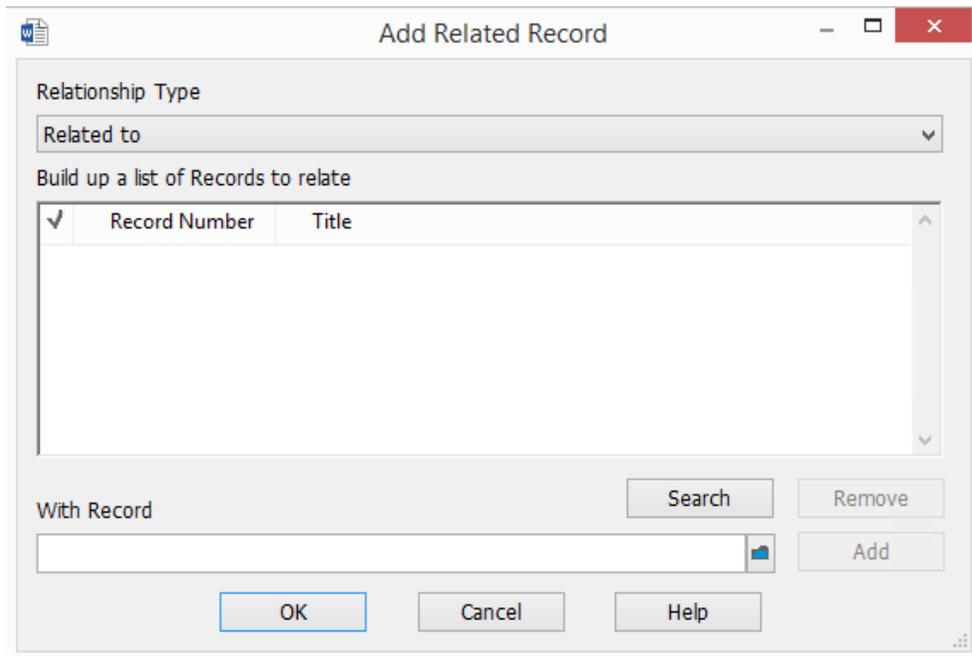
Adding Notes

Users can add Notes relating the document. Right Click on the document and select **Details**, follow the arrow to **Notes**. Enter the relevant Notes and then select User Stamp to place your personalised digital signature below. (Digital Signatures cannot be altered by anyone else). Select **OK** once completed.

Relating Records

Record Relationships are created to link records with related information together.

1. Search or navigate to a document/s.
2. Highlight the document and select **Relate icon** on the toolbar 
3. Select a **Relationship Type** from the drop down menu.



Relationship Type

Related to

Build up a list of Records to relate

✓	Record Number	Title

With Record

Search Remove Add

OK Cancel Help

4. Select the blue KwikSelect button  to search or navigate to a Record. Highlight the Record and select **OK**.
5. Once a relationship has been added, select **OK**.

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The records will now have a relationship.

Navigating to Related Records

1. Search or navigate to a document.
2. Highlight the document, select the **Related Records icon** on the toolbar. 
3. All items related to that record will now display.

Moving Documents and Emails between Containers

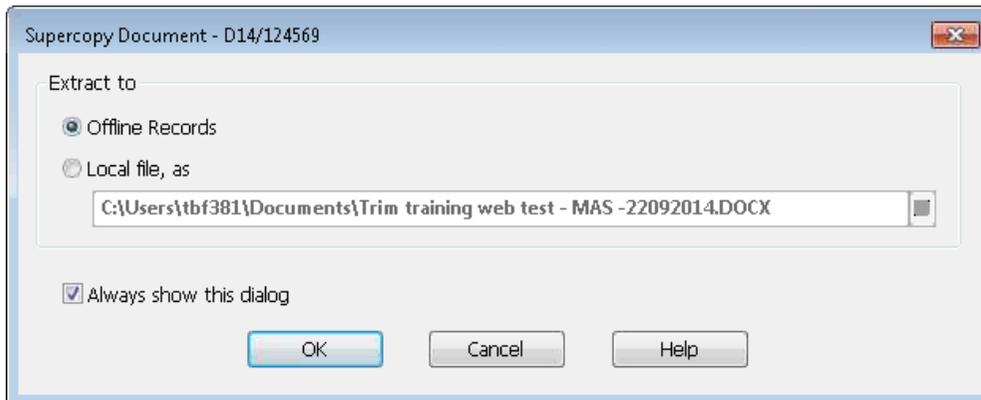
1. Highlight the document, drag and drop it onto the File or Sub Folder.
2. Select **OK** to confirm the move.

The Record will now be contained within the new File or Sub Folder.

Supercopying Records

A supercopy is a copy of a Record that exists in HP Records Manager. Creating a Supercopy does not affect the original document.

1. Search or navigate to a document.
2. Highlight the document, right-click and select **Supercopy**. 
3. The Supercopy Document window will appear. Select where you want to document to be Supercopied to.



4. Select **OK**.

The document will now be supercopied to the location selected.



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Hint! Select **Local File, as:** and select the save icon  to save the supercopied record to a specific file path