



BSA Information Technology Modernization (BSA IT Mod)

FIR Document Version Control Job Aid

Version 1.0

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FIR Document Version Control

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FIR Document Version Control

FIR Document Version Control

The FIR System provides users with the capability to view the version history of a document that has been uploaded to their Work Item, allowing users to see previous versions of a document. Users can check out the current version of the document, make changes, and save the document as a new version in FIR. Users can also revert back to any previous version of the document at any time.

Part I: Check Out A Document

Users have the ability to check out a document for exclusive rights to modify the file. This prevents multiple users from modifying the same document and overwriting each other's changes.

To check out a document, users must navigate to the Documents tab, hover over the name of the document to be checked out, and click on the down arrow to the right of the document to bring up the file properties menu.

On the properties menu, click on **Check Out** to lock the file and prevent other users from uploading changes.

Upon clicking Check Out, a dialogue box appears. Click **OK** to proceed with the check out or **Cancel** to abort the process. The "Use my local drafts folder" check box should remain unchecked.

Note: The dialogue box may not always appear, please continue to the next step.

Navigate to the Documents tab

Hover over the file name and click the arrow to bring up the Properties menu

Select Check Out to check out the file

Type	Title	Name	Created		
Count= 2					
smoke test	CrystalReportViewer - MS Word of Chi Fu Chang	Inside	No	Rahul Marwaha	10/25/2013
Smoke Test	Smoke Test	Inside	Yes	Rahul Marwaha	10/25/2013

Microsoft Internet Explorer

You are about to check out:
Name: Smoke Test.doc
From: bsa.fincen.gov
 Use my local drafts folder

OK Cancel

Some files can harm your computer. If this information looks suspicious, or you do not fully trust the source, do not open the file.



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Once a file is checked out, a check out icon appears with the file type icon. Users can hover over the check out icon to see who has checked out the file.

Click on the file name to download the file for editing.

When all changes have been made to the document, the user should save the document to his/her computer using the Save As option under the File menu.

Note: The Document should be saved with the original file name. If the file name is changed, a new document will be created in FIR and the original document will not reflect the version change.

Hover over the Check Out icon to see who has checked out the file

Smoke Test 10/24/2013 5:39 PM

Smoke Test.doc
Checked Out To: Rahul Marwaha

Click the file name to download for editing

Working Papers

Type	Title	Name	Initiation	Do Not Distribute	Created By	Created
Count= 2						
	smoke test	CrystalReportViewer - MS Word	Inside	No	Rahul Marwaha	10/25/2013 2:00 PM
	Smoke Test	Smoke Test NEW	Inside	Yes	Rahul Marwaha	10/25/2013 1:21 PM



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Part II: Check In A Document

When users have completed their edits, they must upload the document to check it back into the FIR system.

Users can upload the document by clicking **Add New Paper** from the Documents tab. This will bring up the Upload Documents box where the user can browse for the file and enter version comments.

The user should check the “Add as a new version to existing files” checkbox.

Click **OK** to upload the document and open the file properties window, or **Cancel** to abort the document upload and return to the Documents tab.

The properties window can be used to update the properties of the document, including the Title, Document Type, and Initiation.

Click **Save** to apply the updates to the document properties or **Cancel** to abort the updates.

Click Add New Paper to begin the upload process

Work Item Overview Work Item Info Investigative Case Documents Dissemination

+ Add New Paper Set Alert

Browse for the file to upload, check the box to Add as a new version to existing file, and enter version comments

Work Item Documents - Upload Document

Upload Document

Browse to the document you intend to upload.

File Name: C:\Users\wathearn\Documents\FinCEN\ Browse...

Add as a new version to existing files

Version Comments: Enter version comments here.

Click OK to upload the document

OK Cancel

Work Item Documents - Smoke Test.doc

The document was uploaded successfully and is checked out to you. Check that the fields below are correct and that all required fields are filled out. The file will not be accessible to other users until you check in.

Name * Smoke Test .doc

Title smoke test title

Document Type Working

Initiation Inside

Do Not Distribute

Update the document properties

Click Save to apply the properties changes

Save Cancel

Version: 0.4
Created at: 10/25/2013 1:21 PM
Last modified at: 10/25/2013 6:10



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Once the document is checked in, it is available for check out and modification by other users.

Type	Title	Name	Initiation
Count= 1			
	smoke test title	Smoke Test	Inside

The document has been checked in and the check out icon is gone

Type	Title	Name	Initiation
Count= 1			
	smoke test title	Smoke Test	Inside

Hover over the file name and click the arrow to bring up the Properties menu

Type	Title	Name	Initiation
There are no items in this list.			

- View Properties
- Edit Properties
- Check In
- Discard Check Out**
- Version History
- Compliance Details
- Alert Me
- Send To
- Delete

Select Discard Check Out to unlock the document and make it available for editing to other users

Users can “unlock” a document without checking it in by hovering over the document name, clicking the down arrow to bring up the properties menu, and selecting **Discard Check Out**. A confirmation box will appear. Select **OK** to complete the Discard Check Out action, or **Cancel** to abort and leave the file locked.

Open Document

You are about to discard the checkout of the following file:

File name: Smoke Test.doc
From: bsa.fincen.gov

OK Cancel



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Part III: View Version History

Users have the capability to view and restore historical versions of documents that were uploaded to FIR.

Users can see all versions of a document from the Documents tab by hovering over the document name, clicking the down arrow to bring up the Properties menu, and selecting **Version History** to bring up the Version History window.

Restore A Previous Version

Previous versions of a document can be restored by hovering over the date/time of that version, clicking the down arrow, and selecting **Restore**.

Navigate to the Documents tab

Hover over the file name and click the arrow to bring up the Properties menu

Select Version History to see the version history of the file and to view and restore previous versions.

Version History

No. ↓	Modified
0.4	10/29/2013 4:08 PM
	Do Not Distribute Yes
	Title smoke test 2
0.3	10/29/2013 3:41 PM
	Do Not Distribute No
	Title
0.2	10/29/2013 3:39 PM
	Do Not Distribute
	Title
	View
	Restore
0.1	10/28
	Delete

Hover over the date/time and click the down arrow. Then select Restore.

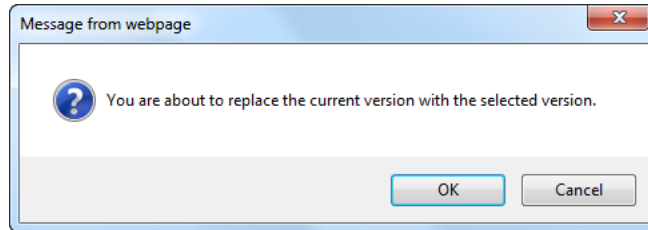


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Upon selecting Restore, a confirmation box will appear. The user must click **OK** to create a new version of the document from a copy of the restored version.

View A Previous Document Version

Users can view a previous version of a document by clicking on the date/time stamp of that version. Users can then open the document or save it on their computer.



Version History	
No. ↓	Modified
Delete All Versions Delete Minor Versions	
0.4	10/29/2013 4:08 PM Do Not Distribute Yes Title smoke test 2
0.3	10/29/2013 3:41 PM Do Not Distribute No Title
0.2	10/29/2013 3:39 PM Do Not Distribute Yes Title smoke test 2
0.1	10/28/2013 4:06 PM Document Type Working Initiation Inside Do Not Distribute No

Click the date/time stamp to open a version of the document