

Reference Number: ORG.1611.PR.008	Program Area: Information
	Technology
Issuing Authority/Source: Information	
Technology	Policy Section: Internal Portal
	Services Contributors Resources
Issue Date: August 27 2014	Subject: Check Out Check in a File
Review Date:	
Revision Date:	

SUBJECT:

Check Out Check in a File

PURPOSE:

Procedure to Check Out Check in a File on the Internal Portal Service

PROCEDURE:

Staff are encouraged to work with the reliable electronic original, therefore, when working with files in the Collaborative Work Site(s) it is a best practice to use the Check Out Check In file feature to facilitate updating, identifying to others which electronic documents are in use by which users at a given time prior to return to storage. This control prevents others from attempting to edit a file at the same time resulting in a potential file version conflict.

 Hover your cursor over the file you want to open. Click the drop down arrow that appears beside the file name. 	Procedure Save an Email Message 12/03/2009 Procedure to Create Regional Staff Announcements and Bulletins 20/11/2008 11/03/2009
2. From the drop down, click Check Out .	Procedure Domwrite a Ne 10/0/2009 Owewrite a Ne Dewordte a Ne D
 You will be prompted to confirm You are about to check out: <i>file name</i> Click OK. 	Microsoft Internet Explorer You are about to check out: Name: lendar of Events.doc From: intranet Image: 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.

4.	The screen will refresh. Your file will now be checked out. This is indicated by the visual cue that shows an arrow to the bottom right of the file icon.	Procedure Uploading Multiple Files 27/08/2008 Procedure Uploading Staff 19/11/2008 Development Calendar of Events 19/11/2008
5.	Click the file name once to open the file you have checked out. You will be prompted with a screen indicating that you areopening the following file: <i>File Name</i> Click OK .	Indows Internet Explorer Some files can harm your computer. If the file information looks suspicious or you do not fully trust the source, do not open the file. You are opening the following file: File name: Procedure Uploading Staff Development Calendar of Events.doc From: intranet OK Cancel
6.	The file will open. The right hand of your screen will indicate that the file is checked out to you. You can now make any required changes to the file.	Status Status Document checked out to: Shannon Bowers Check in
7.	When you have completed your edits, save the file and close it. You will be provided with three choices.	Check In Procedure Uploading Staff Development Calendar is checked out by you. Do you want to: Check in file Keep checked out Discard changes and undo check out OK Cancel
	Check in file means that others can now access the file and check it out to make additional revisions.	
	Keep checked out means that the file will remain checked out to you.	File In Use ? × Procedure Overwrite a File.doc is locked for editing by 'RHACM\sbowers'.
	If someone else in your collaborative work group attempts to open the file you have checked out, a screen will appear advising them that the file is checked out and <i>locked for editing by</i>	Open a <u>R</u> ead Only copy Oreate a local copy and <u>m</u> erge your changes later Receive <u>notification</u> when the original copy is available OK Cancel

By selecting Receive notification when the original	File Now Available
<i>copy is available,</i> you will be prompted by a message indicating <i>File Now Available</i>	'Procedure Overwrite a File.doc' is now available for editing. Read-Write Choose Read-Write to open it for editing. Cancel
Discard changes and undo check out is straight forward.	
Select one of the options and click OK	
8. Once you have checked the file in, the green arrow will no longer appear.	