

Create, edit, and delete Documents

Jenny Kongkalai - 2023-09-12 - Manage Content

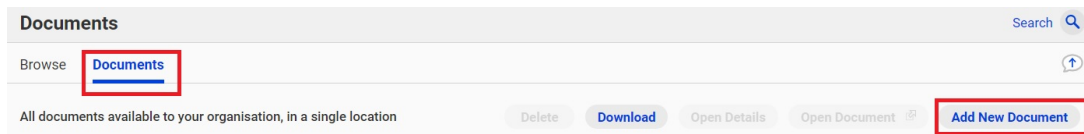
Managing documents in Holocentric Connect

Documents can either be stored in Holocentric or linked from an existing document management system. This article includes the following topics:

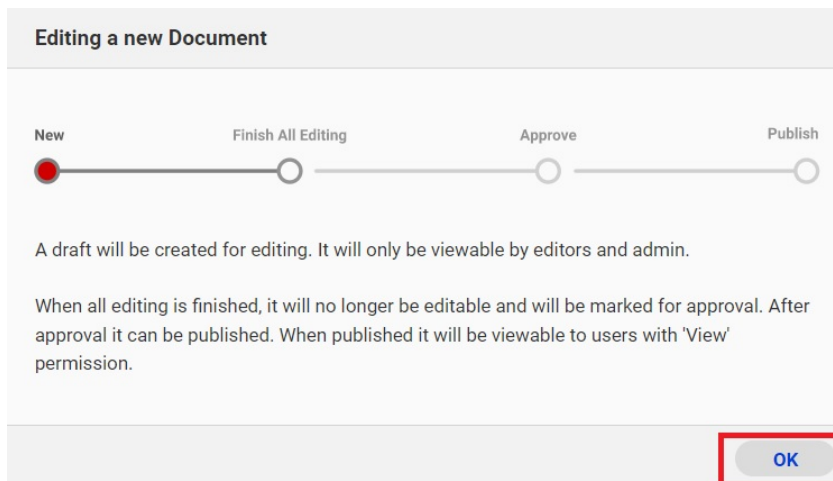
1. Add a document
2. Edit existing document
3. Approve document
4. Delete document

1. Add a document

1.1 Access the **Documents** tab, click on the **Documents** subtab, and click **Add a New Document**.



1.2 A release management workflow appears. Click **OK** to start adding the document.



1.3 Link your document. You can either upload the document from your computer or add a link.

DOCUMENT SOURCE

Source: Upload from your computer Link to document on the internet

Upload: **Select**

Cancel **Save**

1.4 Input all other relevant document details.

Documents > Documents

Add a new Document

DOCUMENT SOURCE

Source: Upload from your computer Link to document on the internet

Upload: **Select**

GENERAL DETAILS

Display name:

Description:

External reference identifier:

BROWSING DETAILS

Summary:

Roles this is relevant to:

Assign

Required reading: This item is required reading for the Roles it is relevant to

Category: **Select**

VIEWING & SEARCH

Keywords for 'Search':

Remove from view: Hide this item from being viewed, listed, browsed, edited and searched for

Cancel **Save**

Field	Description
Display name	The title will be displayed.
Description	An introduction to the document.
External reference identifier	An identification code/number for the item. This can be used if the item is being mitigated from a different system or if a system of identifiers is required. This field is optional.
Summary	The short description will appear under the document title when you are browsing Documents .
Roles this is relevant to	The roles associated with the document. You can use this to filter content for specific roles.
Category	The group to which the document belongs.

Required reading (for customers with Attestation only)

Tick this box to make this item required reading for all roles to which the item is relevant.

Keywords for 'Search'

Keywords that, when searched in the web app, will make the item come up in search results.

Remove from view

Tick the box to hide the item. This will make the item only visible to users with Administrator permissions. Hidden items will:

- not shown in lists
- not shown as a related item on any other items.
- not accessible by URL (will show item not found message)
- not shown in any downloadable report.

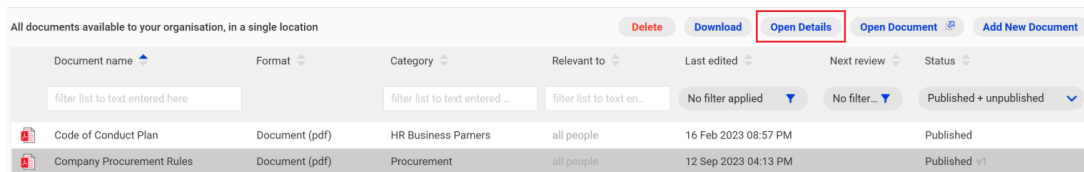
1.5 Click **Save** to commit changes. Your new document will be saved as a draft. We recommend that if you intend to make any changes, do so when the document is in a draft state. Move to the approval stage after you have made all intended changes.

2. Edit existing document

2.1 Access the **Documents** tab and click the **Documents** subtab.

2.2 Click on the document you wish to edit and **Open Details**.

Please note: published versions can not be edited if a draft version is currently in progress. Edits will need to be done to the draft version.



All documents available to your organisation, in a single location

Document name	Format	Category	Relevant to	Last edited	Next review	Status
Code of Conduct Plan	Document (pdf)	HR Business Partners	all people	16 Feb 2023 08:57 PM		Published
Company Procurement Rules	Document (pdf)	Procurement	all people	12 Sep 2023 04:13 PM		Published v1

2.3 When open, click **Edit** to activate edit mode. If the document is already marked 'Awaiting Approval' or 'Ready to Publish', open the document details and revert it to a draft.

2.4 Once changes have been made, click **Save**. The document will remain in draft.

2.5 If all changes have been made, click **Finish All Editing**.



Documents > Documents

Company Procurement Rules Draft v2

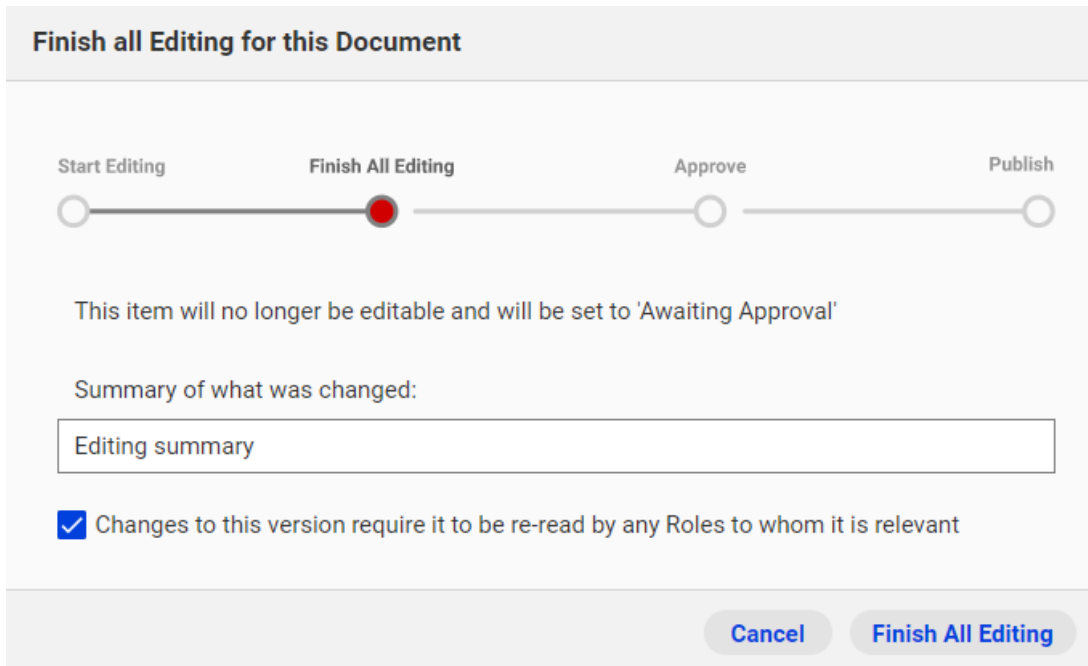
Details Version

DOCUMENT SOURCE

View or read Document

Source: Uploaded from a computer or device

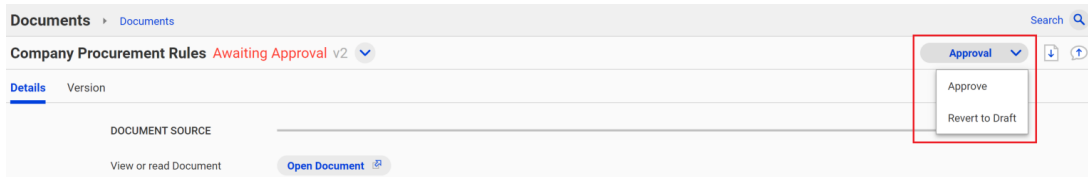
A release management workflow appears. Write a summary of what you intend to change, you will be able to edit this summary later if needed.



2.5 Click **Finish All Editing** to commit all changes. Your document has now been submitted for approval.

3. Approve the document

3.1 Documents that have been submitted for approval will be marked as 'Awaiting Approval'. Click the **Approval** drop-down to view your options. You can revert the document to a draft if you want to make further changes. Click **Approve** when you are ready to publish your changes.



3.2 A release management workflow appears. You have the option to select who approved the item, the date on which it was approved as well as the next review date. If required, edit your summary and click **Approve** to move to the publishing stage. Your document is now marked 'Ready to Publish'.

Approve this Document

Start Editing Finish All Editing **Approve** Publish

Approve that "Company Procurement Rules" is ready to publish.

Approved by:

Simon Ormsby

Approved on:

12 Sep 2023

Next review:

Select when this version should next be reviewed

Summary of what was changed:

Completed edits

Changes to this version require it to be re-read by any Roles to whom it is relevant

Tip: If the document is part of a larger release (i.e. a release with multiple content updates), leave it marked 'Ready to Publish'. When you are ready, you can publish it at the same time as your other content updates by accessing the **Home** tab and clicking **Manage Changes**. Please see the guide titled *Publish multiple changes (in one release)* for more information.

3.3 Click **Publishing** to view your options. You can revert the document to a draft if you want to make further changes. Click **Publish Immediately** when you are ready to publish your changes.

Note: You **cannot** edit older versions of the document once the latest version is published.



3.4 A release management workflow appears. If required, edit your summary and click **Continue** to move to the next stage.

Publish this Document immediately



Publishing immediately will make this item viewable to non-editors and will replace any existing published version. It will bypass the recommended managed release from 'Manage Changes' in 'Home'. Apart from Roles, any related unpublished items will remain unpublished.

Approved:

29 Jul 2022, by Antoinette France

Summary of what was changed:

Editing summary

Cancel

Continue

3.5 The release notes window appears. Write official release notes about the new document or document update. You can edit the release notes later if required.

Release label and notes

Publishing: "Company Procurement Rules"

Label this release:

Release notes:

☰
☰
☰
☰
Insert
Clear Styles

Editing summary

Post a News Item about this when the items are published

News Item title:

News message:

Include a link to the Release summary

Email notification: Email all users when this News Item is published

Field	Description
Label this release	The official name of this release.
Release notes	Details about what updates you have made.
Post a news item about this when the items are published	If selected, you can post a news item on the Home tab to notify users about your content changes.
News item title	Title of the news item that will appear in the Home tab.
News message	The message that will appear under the news item title.
Include link in release summary	If selected, this option will allow you to include a link to the release notes for the item.
Email all users when this News Item is published	If selected, all web app users in your organisation (provided they have activated their account) will receive an email notification about the release at 5:30 am AEDT/AEST the following day.

3.6 Click **Publish** to officially release the document. You will receive confirmation when the

item is published. It is now visible to all users.

4. Delete the document

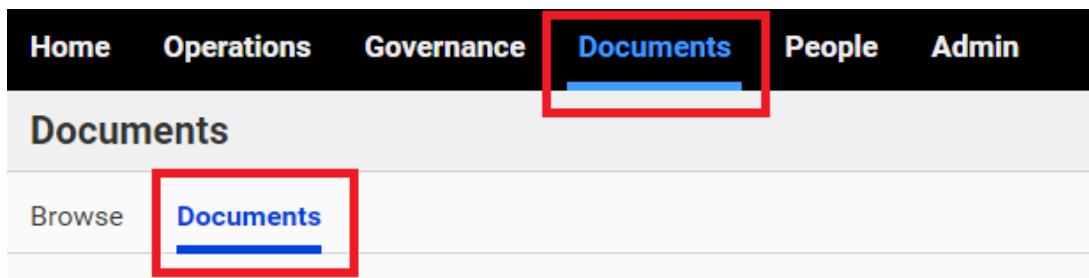
Document deletion within release management will be subject to a workflow similar to that which determines content editing and creation. Follow the steps below to delete a document from your web app.

IMPORTANT

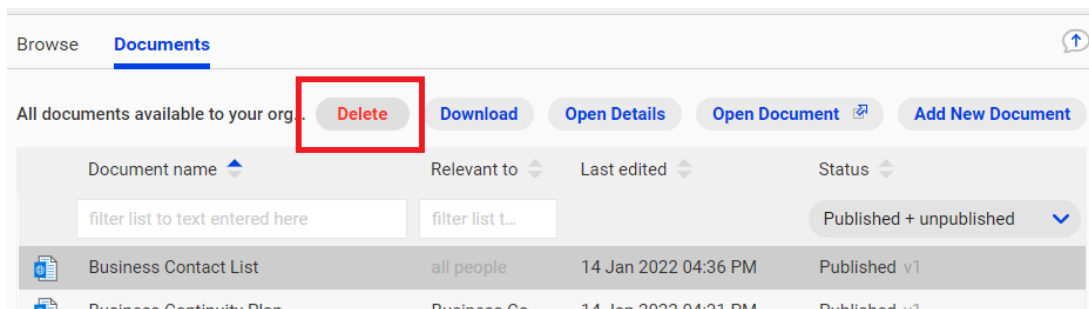


Once approved and confirmed, all deletions are permanent.

4.1 Click the **Documents** tab and access the **Documents** subtab.



4.2 Click on the item you want to delete and click **Delete**.



Tip: If the document is in a draft state (i.e. marked 'Draft', 'Awaiting Approval' or 'Ready to Publish'), clicking **Delete** will remove it without activating the deletion workflow.

TIP



If you assign a role to a process, only users that have been assigned this role in the web app will be able to see it in the **Browse** menu. All other users can still see it in the list view.

IMPORTANT



You will **not** be able to delete a published version of a document if it has a newer copy that is:

- in a draft state
- awaiting approval
- marked as 'ready to publish'
- already marked for deletion.

4.3 A release management workflow appears. Give a summary of why you are deleting the document and click **OK**. Your item will now be marked 'Awaiting delete approval'.

4.4 To approve the item for deletion, click on the item in the list, and click **Open details**.

Browse Documents

All documents available to your organisation, in a single location

Delete Download **Open Details** Open Document Add New Document

Document name Category Relevant to Last edited Status

filter list to text entered here filter list to text enter... filter list to tex... Published + unpublished

Business Contact List	no group	all people	29 Jul 2022 10:32 AM	Awaiting Delete Approval v1
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4.5 Click **Approval** to see your options. At this stage, you can still reverse the deletion. Click **Revert (Don't Delete)** if you want to do so. If you want to proceed with the deletion click **Approve Deletion**.

Business Contact List Awaiting Delete Approval v1

Approval

Approve Deletion

Revert (Don't Delete)

Details Version

DOCUMENT SOURCE

4.6 A release management workflow will appear. You also have the option to select who approved the deletion and the date on which it was approved. Edit your summary (if required) and click **Approve**.

Approve the Deletion of this Document

Delete
 Approve Deletion
 Delete on Publish

This will approve the deletion of "Business Contact List". The actual deletion will take place when it is published.

Approved by:

Antoinette France

Approved on:

29 Jul 2022

Summary of why this item is to be deleted:

Delete

4.7 When you have approved the deletion, you can permanently delete your item. The item will be marked 'Delete on Publish'. Click **Open Details** again.

Tip: If the deletion is part of a larger release (i.e. a release with multiple content updates), leave it marked 'Delete on Publish'. When you are ready, you can publish it at the same time as your other content updates by accessing the **Home** tab and clicking **Manage Changes**. Please see the guide titled *Publish Multiple Changes* for more information.

4.8 Click **Publishing** to see your options. At this stage, you can still reverse the deletion. Click **Revert (Don't Delete)** if you want to do so. If you want to proceed with the deletion click **Delete Immediately**.

Business Contact List Delete on Publish v1

Details Version

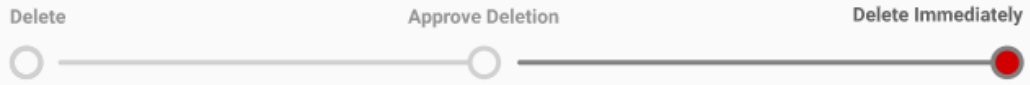
DOCUMENT SOURCE

Delete Immediately

Revert (Don't Delete)

4.9 A release management workflow will appear. Edit your summary (if required) and click **Continue**.

Delete this Document immediately



Publishing the deletion of this item will remove it from view and perform the actual deletion. The deletion is permanent and not reversible. This will bypass the recommended managed release from 'Manage Changes' in 'Home'.

Approved:

29 Jul 2022, by Antoinette France

Summary of why this item is to be deleted:

Delete

Cancel

Continue

Write release notes for the deletion. Release notes are the official overview of all your changes and updates.

Release label and notes

Deleting: "Business Contact List"

Label this release:

Release notes: Insert Clear Styles

Post a News Item about this when the items are published

News Item title:

News message:

Include a link to the Release summary

Email notification: Email all users when this News Item is published

Cancel Publish

Field	Description
Publishing	The official name of this release.
Release notes	Details about what updates you have made.
Post a news item about this when the items are published	If selected, you can post a news item on the Home tab to notify users about your content changes.
News item title	Title of the news item that will appear in the Home tab.
News message	The message that will appear under the news item title.
Include link in release summary	If selected, this option will allow you to include a link to the release notes for the item.
Email all users when this News Item is published	If selected, all web app users in your organisation (provided they have activated their account) will receive an email notification about the release at 5:30 am AEDT/AEST the following day.

5.0 Click **Publish** to permanently delete the item.

END