

iManage - Working with Checked Out or Offline Documents

iManage provides two options to work on files remotely when there is a system issue, outage or when Wi-Fi is not available eg, on an aeroplane.

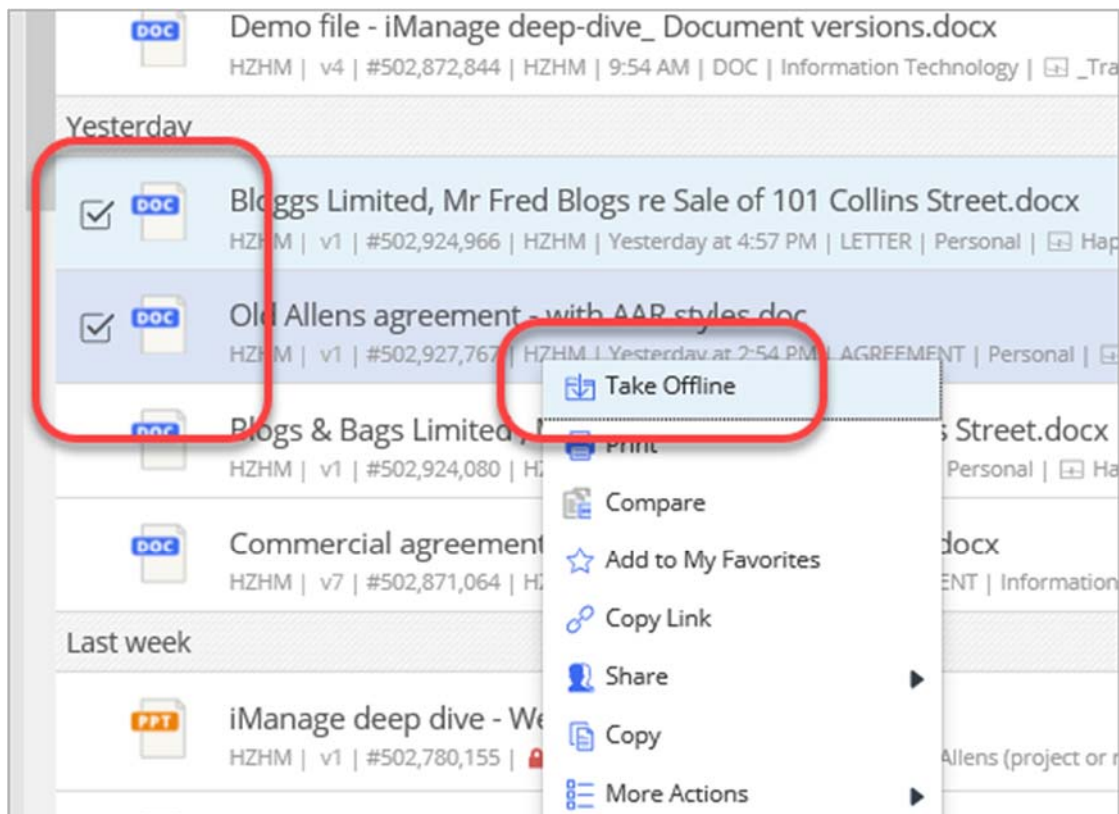
Take Offline - the file is available locally on the laptop and does NOT lock the file. This means any other person can edit the document and save the changes.

Checkout - locks the file in iManage and places it locally on the laptop. Others can only access a Read Only copy of the file.

When the document is Offline, it can be accessed from the respective application eg, Word from the File > Open dialog box.

Take Offline

- 1 Select the file(s) then right-click and click **Take Offline**.

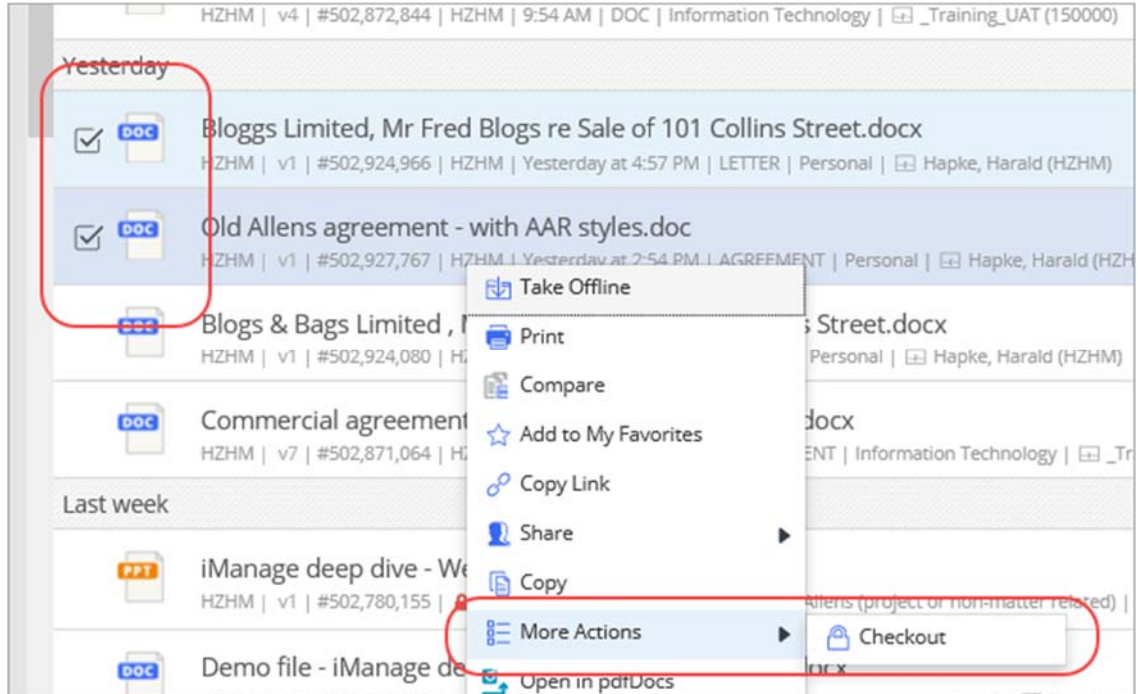


A pop up then appears at the bottom of the screen to show that files have been taken Offline. This will also show in the Timeline against the document.



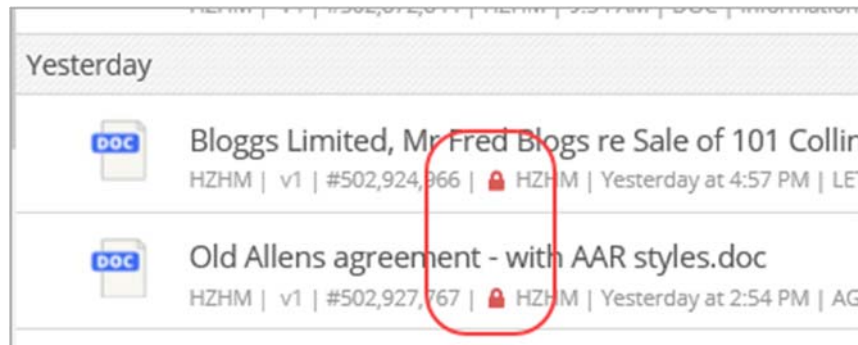
Checkout

1. Select the file(s) then right-click and click **More Actions > Checkout**.



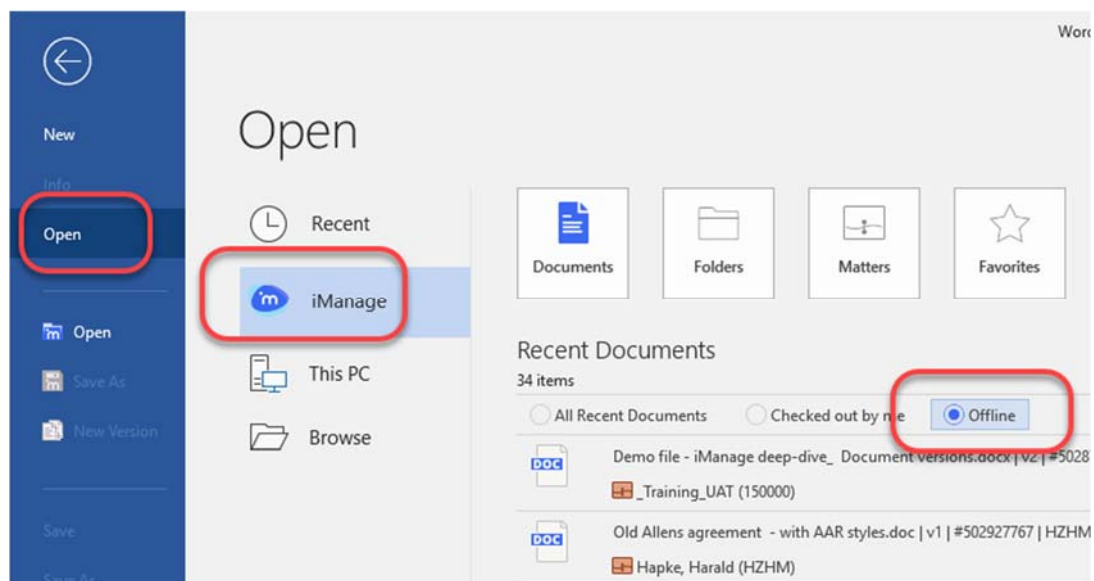
The files are checked out and a lock symbol displays on each file.

Files that are checked out are locked on the system and cannot be edited by others. Others can only access a Read Only copy of the file.



Working with Offline documents

1. Start your application eg, Word.
2. Select **File > Open > iManage**.
3. Ensure **Offline** is selected.



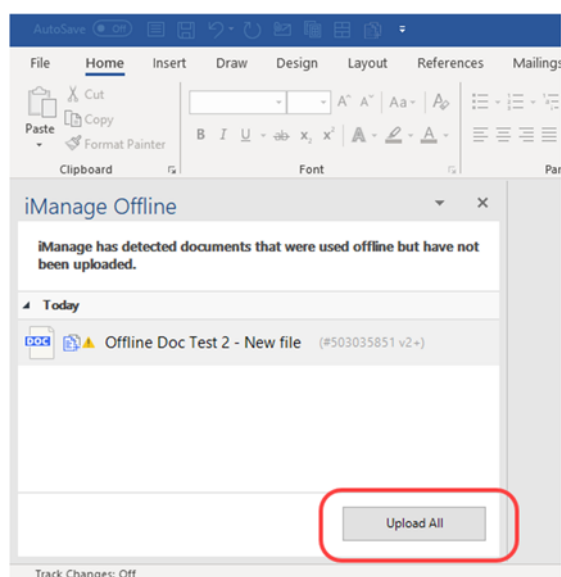
4. Click the **title** of your document to open it.
5. From here you can:
 - edit the document
 - create a new version and edit the file or
 - create new documents
6. Save and Close your files.
7. Close Word.

Note: you must close Word. If it is open when you go back online word can freeze.

Check-in files

1. Start Word.

Word displays with the iManage Offline panel:



2. Click the **Upload All** button (bottom of panel).

- (a) If you had created a new version the New Version dialog box displays. add a comment if relevant and click Save. The file is uploaded
- (b) If you created a new file the Save as dialog box displays. Name the file, check that the correct matter has been selected when offline then click the Documents folder and save the file.

The files are uploaded and checked in and Word is left on screen with no file open.

3. To continue working on the uploaded files, in word select **File > iManage Open** and select the file alternatively display iManage Work and open the file from there.

Note:

Files that are taken Offline are not checked out on the system. Therefore the original can be taken offline, edited or new versions created by others online. If the original was modified, iManage will prompt you to save your edits as a new version when it is uploaded.