Document Versioning in LawMaster

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Document Revisions

The following table lists all the updates made in the document from its previous version.

Version Number	Owner	Updates
V0.1	AXP	First Draft
V0.2	PHB	Reviewed
V1.0	AXP	First Release
V1.1	BFF	Added information about finalising previous versions of a document.

Contents

Document Versioning in LawMaster

Document Versioning is way of managing multiple versions of the same document. Versioning documents (Folios) allows you to revise documents while preserving the original files. It is a secure way to work, and you can always return to earlier versions, when necessary.

For instructions on versioning in LawMaster, see the below sections.

Creating a New Version

This feature allows you to copy the selected Folio and attachments to a new Folio item, with a new Folio number.

1. You can create a new version of an existing folio by Select Folio → Right-click → New Version from the context menu.
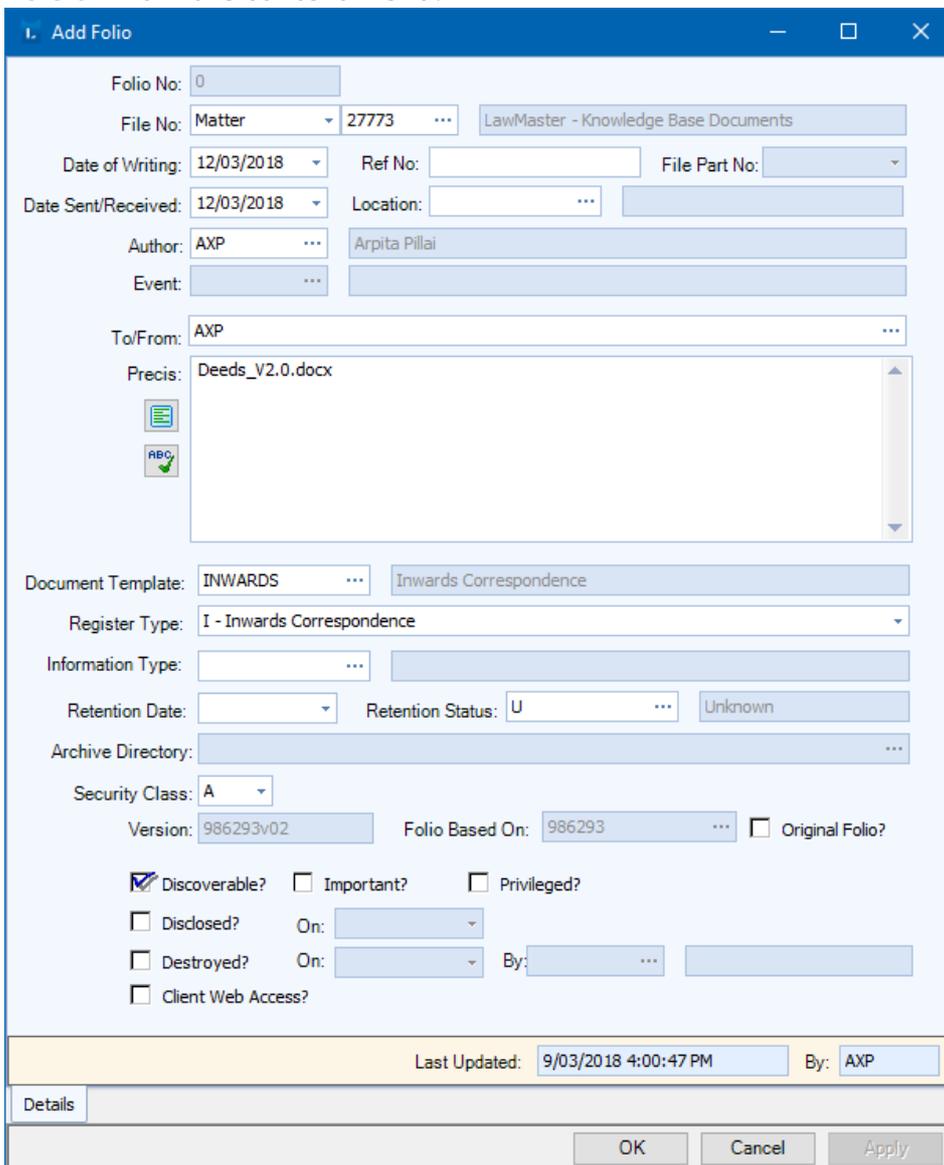

Figure 1: Adding a New Version of an existing Folio

2. Fill the fields with the required information, click OK.
3. Upon saving, the new Folio record will be created in the same Matter as the original Folio. LawMaster displays a message prompting if you would like to edit the saved Folio document.
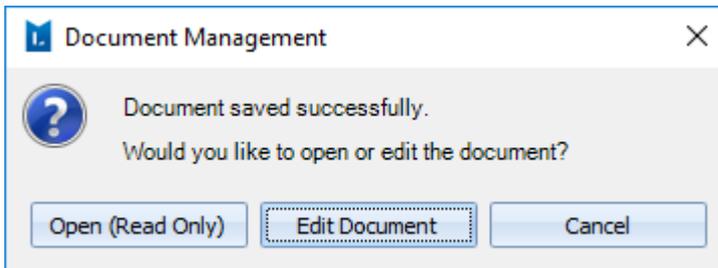

Figure 2: Message prompt to edit the Folio

4. Click, as required.

IMPORTANT:
The Version number is made up of the original Folio No. plus the version number e.g. 9747v02 (Version 02 for Folio No 9747).

Finalising Versions of a Document

If the Finalise all existing versions of a document? checkbox is ticked in Menubar → Parameters → Set Parameters → Records Management, when a new version of a document is created, all existing versions of the document will be finalised. This means that only the most recently created version will be available for editing, unless another version is unfinalised.

Viewing Document Versions

All versions of Folios are attached to each other and can be viewed via a Versions tab at the bottom of the screen. From each of these versions, the standard Folio functionality applies (i.e. Modify/Open/Print/Check In/Check Out).
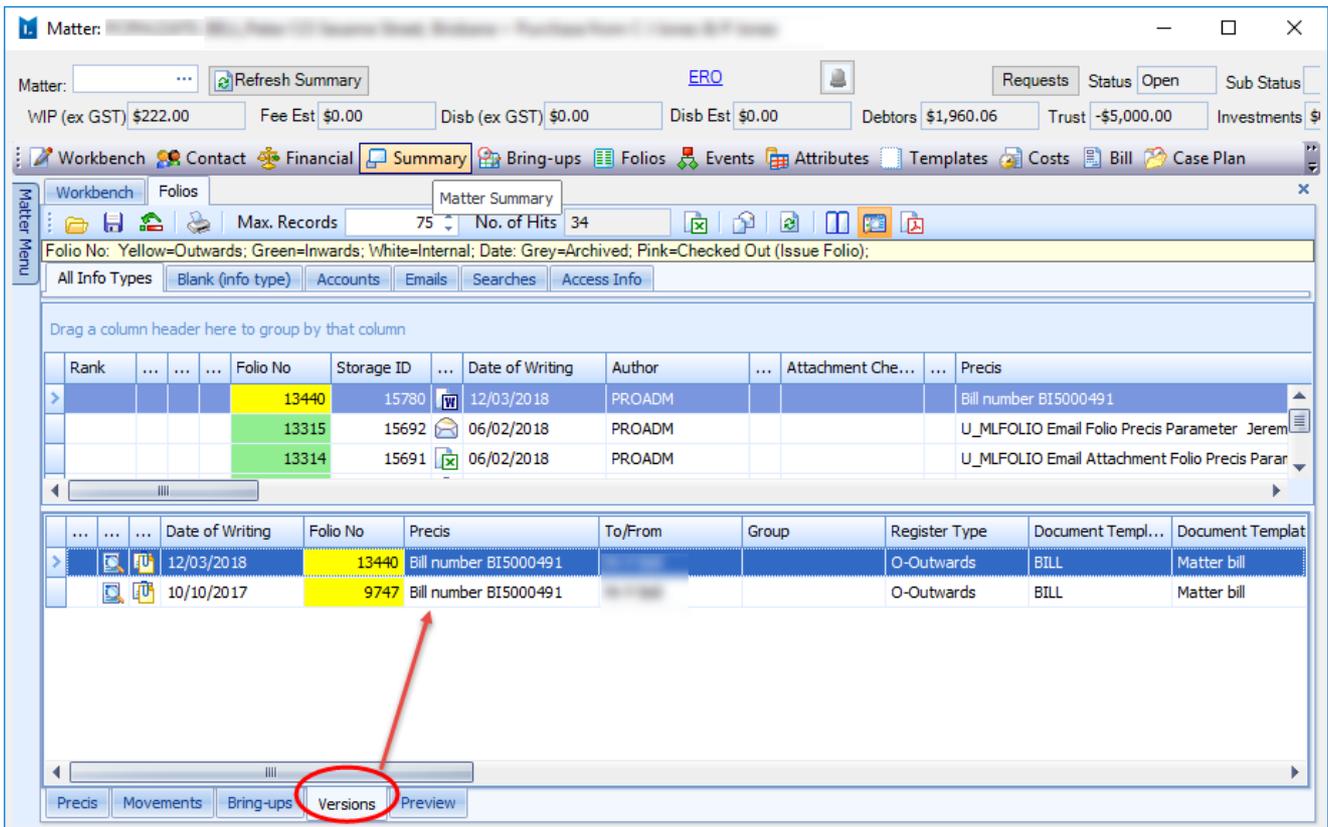
Figure 3: Document Versions on Folios

You can view the current version of the selected Folio record from the Version information on the Modify Folio screen. This also shows whether the selected Folio is the 'original' or a version of an existing Folio.

1. On Matter → Folios, select the Folio whose version information you need to view.
2. Right-click and select Modify from the context menu.
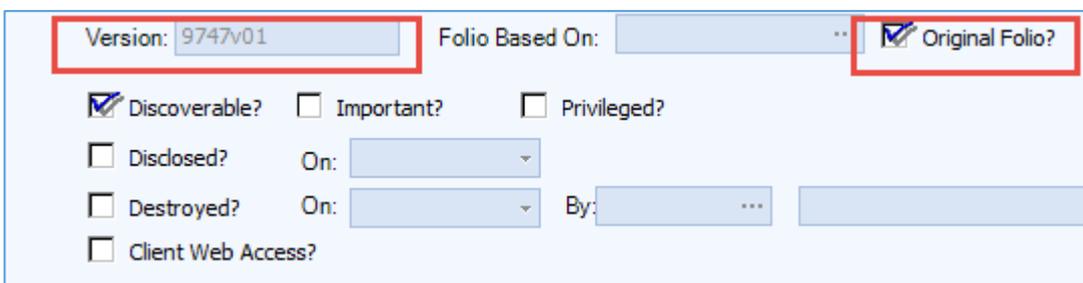3. The Modify Folio screen opens where you can view the Version information of the selected Folio.

Figure 4: Folio Version Information where the Folio is 'Original'

Figure 5: Folio Version Information where the Folio is a 'Version' of an existing Original Folio

- ❖ Version: Displays the version number of the selected Folio. Read-only field.
- ❖ Folio Based On: Displays the Folio No. of the Folio, which was used to create the selected Folio. Select/enter the required Folio No. if required.
- ❖ Original Folio: Displays if the selected Folio is the 'Original'. Tick/untick as applicable.

Editing Versions

If you update anything in an older version of a Document Folio, those changes will not reflect in the other versions of that Folio. This is because LawMaster treats each version as a separate individual document.

- ❖ When you open a Folio to edit it, and a newer version of that Folio exists, LawMaster displays a warning as following:
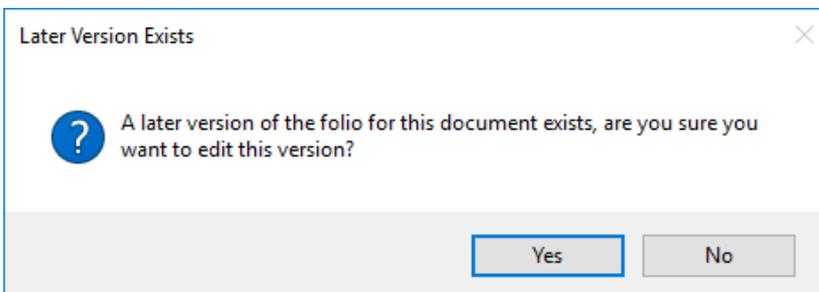

Figure 6: Warning displayed upon editing an older version of a Folio

- ❖ When you try to create a New Version (Folio → Right-click → New Version) from a Document whose newer version already exists, LawMaster displays the following warning message.
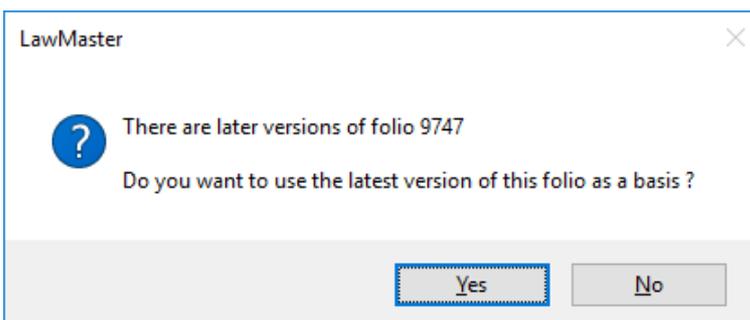

Figure 7: Warning displayed when creating New Version from a Document whose Newer Version already exists in LawMaster

Deleting Versions

As already said above, LawMaster treats the versioned Folio Documents as individual separate records that can be actioned upon as required without affecting the other versions of that Folio. The versions of any Folio can be deleted in the same manner as you would delete any other Folio in LawMaster.

Select Folio → Right-click → Delete

Note:

For example, if you have v01, v02 and v03 versions of Folio 9739. If you delete v02, and create a new version from v01 or v03, the new version that will be created will have v04 suffix. i.e. the system does not reset the version counter when any of the versions of a document are deleted. Instead, the succeeding version no. is assigned to any new versions of a Folio that are created.