

## Document History

### View the Document History panel

Each document has a "Document History" panel that anyone with access to the document can view. This panel contains historical event entries with a description of the event, the time it occurred, and who made the change.

The Document History panel displays entries for:

- Document events - when a document was created, deleted, undeleted, completed, incompleted, or amended
- Field changes - when the contents of a field change
- Translation requests - entry will show status of request (pending, denied, complete)
- District to district document transfer - document shows it was created from a transfer

Using the history panel, users may easily see how a document has collaboratively evolved over time and what it looked like at critical points.

### **Steps** *To view a document's Document History panel:*

1. Visit a document. Click the **Document History** icon (clock) in the toolbar. The **Document History** panel will open on the right side of the screen.
2. When opened, the history panel defaults to displaying the current version of the document. To view the document at a different point in time, click on an entry in the history panel.
  - If an event entry has a caret icon on the side, you can click on it to expand the entry and display more information.
3. To exit read-only **Document History** mode and return to the current document, click the **Document History** icon again.

## Document History panel use cases

### View how the document has changed over time:

- If you're curious about what changes have been made to the document, the Document History panel gives a timeline of changes that people have made.
- Open the Document History panel and scroll to specific period of time to see who was working on the document at that time.
- To see exactly what was changed, click on an individual entry. The document will automatically scroll to and highlight the field that was edited.

### Recover information that has been changed or deleted:

- If you notice that a field within a document has changed and you want to recover the information that was previously there, open the Document History panel and scroll to a period of time before the change was made.
- Find the field in the form that was changed, then copy the information and paste it into the current version of the form.

### View a document as it was at a previous point in time:

- To view a document as it was at a given point in time, find any event entry from that time and click on it.
- Although clicking on the event entry will highlight the field associated with that entry, the entire document will appear as it existed at that point.
- To print that particular version of the document, access the print menu directly from the read-only historic page.

**💡 Tip** To compare different versions of a document, click between panel entries. You can also open the document in two browser tabs, align the browser tabs side-by-side and click **Document History** in each tab. Click varying panel entries in each tab to compare side-by-side.

**💡 Tip** If a completed form has been amended, the Document History panel will contain an "Original completed" entry that shows the document at the time of completion, and an "Amendment completed" entry that shows the document after the amendment was made. These entries are bolded to make them easier to find.

**💡 Tip** Checking **Only document events** at the top of Document History can make it easier to access historical versions of a document. When this box is checked, only

document events (creation, completion, amendments, etc.) will be shown, and clicking on these events will display the document as it was at that point in time.