

Working with revision management

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This article describes the revision management capabilities of the Quotation Tool. There are basically two philosophies;

1. All revisions are kept within your single Quotation Tool file.
2. A new file is created for each revision.

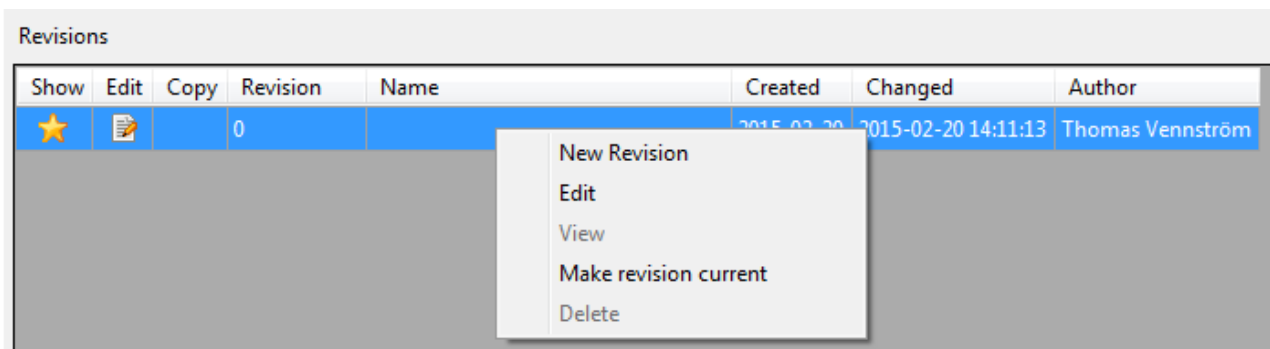
The only time when the latter can be justified is if the file has become so large that it becomes cumbersome to manage. If you keep all revisions within a single file (alternative one), there's no risk you're working on the wrong file (or send the wrong file to a colleague). Another benefit is that you have all history saved in one place.

Revision management is found in three different places;

1. In the "Quotation information/Quotation" tab
2. In the Cash Flow module
3. In the Risk Assessment module.

Revisions of the whole quotation is made in the *Quotation* tab whilst the other only manages revisions of the information for each module.

To create a new revision of a quotation, right click in the **Revisions** window to bring up the context menu.



Select **New Revision** to create a new revision. Then click on the **Edit** icon to edit the details of the revision.

Revision Information

Revision

Name

Revision Author
 Thomas Vennström

Revision Date
 den 23 februari 2015

Description of changes

Cancel Save

Typically you would only alter the **Name** and **Description** of the revision. When done, press **Save**.

You can view an old revision by clicking the **Show** icon on the left hand side of the revision row that you want to view. Only the latest revision can be edited. If you want to re-use an older revision (lets' say revision "0" in the picture below), click on the **Copy** icon and the application will copy the selected revision to a new revision and then make it the current one (this function is named *Make revision current* in the context menu).

Revisions				
Show	Edit	Copy	Revision	Name
			0	
			1	Second revision
			2	

The *Delete* function is only available to administrators. So if you need to delete a revision, consult your local administrator.

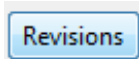
Cash flow and Risk assessment revision management

When you create a new revision the application basically duplicates all the information in your

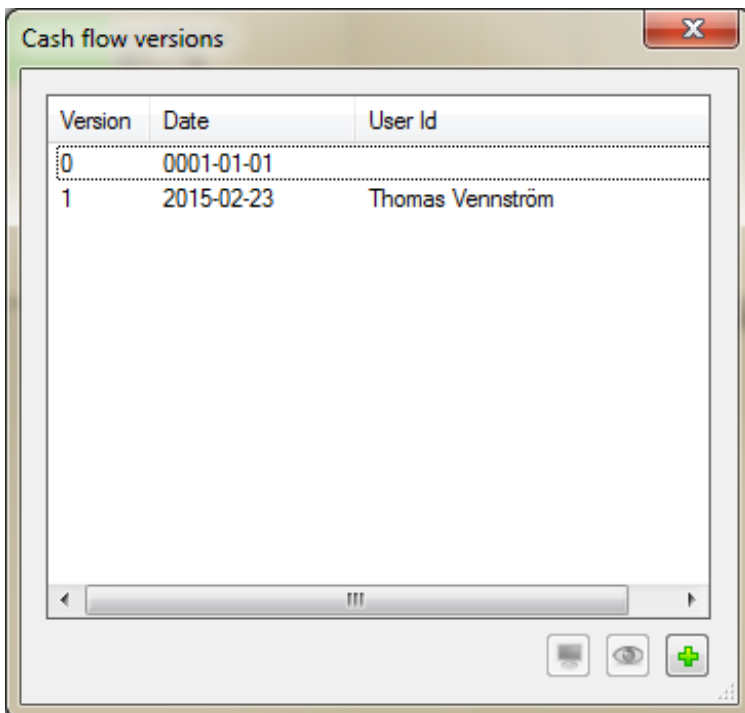
quotation. To avoid having the file grow out of proportions cash flow and risk assessment have their own revision management (as data in these forms are typically revised quite often). So when you need to make a new cash flow revision you shouldn't use the revision management in the quotation tab, rather the one found in the Cash Flow module.

The same type of functionality is also found in the Risk Assessment module, hence the instructions below is also valid for that module.

The revision management of the Cash Flow module is hidden under the **Revisions** button.



By clicking the revision button you'll bring up a dialog



At the base of the dialog there's three buttons (left to right)

1. By selecting one of the revisions not currently loaded this button will load the selected revision into a separate window. Handy if you want to compare two revisions.
2. The middle button will load (read only) an older revision for viewing purposes.
3. The rightmost button will create a new revision.

User ID and version is automatically filled out and cannot be changed.
