

How to use Drafts and Versions

Draft vs Version ?

Draft Save

A draft save is a quick and easy interim save, that does not require log on credentials. **No history is retained for draft saves.** A draft is a working copy of a record. Only one draft can exist per record, so if you draft save twice in a row, the second draft overwrites the first.

Version Save

A version save is a more formal process, that creates an authenticated version of a record. When saving as a version, you must provide a save reason and your log on credentials (i.e. your e-signature). The e-signature required for a version save complies with 21 CFR Part 11, as well as assisting in the protection of IP by adding a date and time stamp to the record.

When do I need to to save a version?

There's no specific rule to define when you need to create a version and you can create as many versions as you want in an experiment. However, a good practice is to save a version when you have for example completed an **significant step** or in case of **collaboration** with another researcher.

Versions History

For any given record in the E-WorkBook ELN, you can view the complete history of version saves. Once you are in the Version history view, you can choose to restore specific the whole record or items of the record from different versions.

The image shows two parts of the software interface. On the left, a 'Review & Sign' dropdown menu is open, listing options: 'Prevent Further Editing', 'Expand All', 'Collapse All', 'Display Print View', 'Export To PDF', and 'Version History'. The 'Version History' option is highlighted with a red rectangular box. On the right, the 'Version History for test keyw...' window is displayed. It shows a list of three versions: 'v1, saved: Oct 16, 2019 3:19:27 PM', 'v2, saved: Dec 18, 2019 11:51:08 AM' (which is highlighted in blue), and 'v3, saved: Dec 18, 2019 11:52:40 AM'. Under each version, there are items with expand/collapse icons and text labels like '(v. 1) Unknown: Formulation_Plan (1).t', '(v. 1) Unknown: Weighthing_and_Proce:', and '(v. 1) Text:'. The word 'Then' is written below the screenshots.

[Restore Record](#)

You can select to restore a whole version of the record:

Or select specific Items to restore:

Restore Record Restore Selected Cancel

Title : test keywords Version number : 2

Created By : Test account user 1 User Name : Test account user 1
Created On : Oct 16, 2019 7:10:27 PM Time Stamp : Dec 18, 2019 11:51:08 AM
Status : 1.CREATED Id : 78491

Save As Review & Sign

- New Version
- Draft
- Discard Changes

(v1) Unknown: (v1) Unknown: (v1) Text: ✓

Save As Review & Sign

- New Version
- Draft
- Discard Changes

Save As Review & Sign

- New Version
- Draft
- Discard Changes

Then enter your credentials:

Please choose a reason for saving the record

Your user name and password credentials control your access to this system and may be used as a legally binding electronic signature for electronic records, if previously specified in the applicable Standard Operating Procedures. By entering your credentials here, you are confirming that the operation may be performed according to these rules.

User Name: ELN_TEST1
Password: []
Reason: Data Added

Cancel Save