How to Check Out and Open a Proposed Regulation
(*Proposed Regulation.dita*)

1.0   TECHNICAL

1.1   **Applies to:**   ✔ ICM   ✔ QUARK

1.2   **Key:**   ⚠ = critical info

2.0   OVERVIEW

Each ICM Regulation Case contains a Quark XML Author (QXA) file that is used to draft the proposed regulation associated with the case. The file is named *Proposed Regulation.dita.*

⚠ The contents of the *.dita* file may be lost or corrupted if it is incorrectly checked out and/or opened from the case.

The **Procedure Summary** section below is for users already familiar with the process of checking out and opening a *Proposed Regulation.dita* file.

The **Detailed Procedure** section is intended for new eRegulations System users.

3.0   PROCEDURE SUMMARY

3.1   Rules

Five (5) important rules to remember when you check out and open a *Proposed Regulation.dita* file.

⚠   1. **Do not** use Microsoft Word's "Open Document" menu;
⚠   2. **Always** check your Word Preferences Settings before you check out, download and open the *.dita* file for editing;
     3. **Use** the "Case Information" window in IBM Case Manager to check out and download the file;
⚠   4. **Do not** "Open" the downloaded .dita file;
     5. **Always** use "Save" or "Save as" and *then* open the downloaded *.dita* file.

3.2   Steps

From within the regulation's "Case Information" window in ICM, follow these steps:
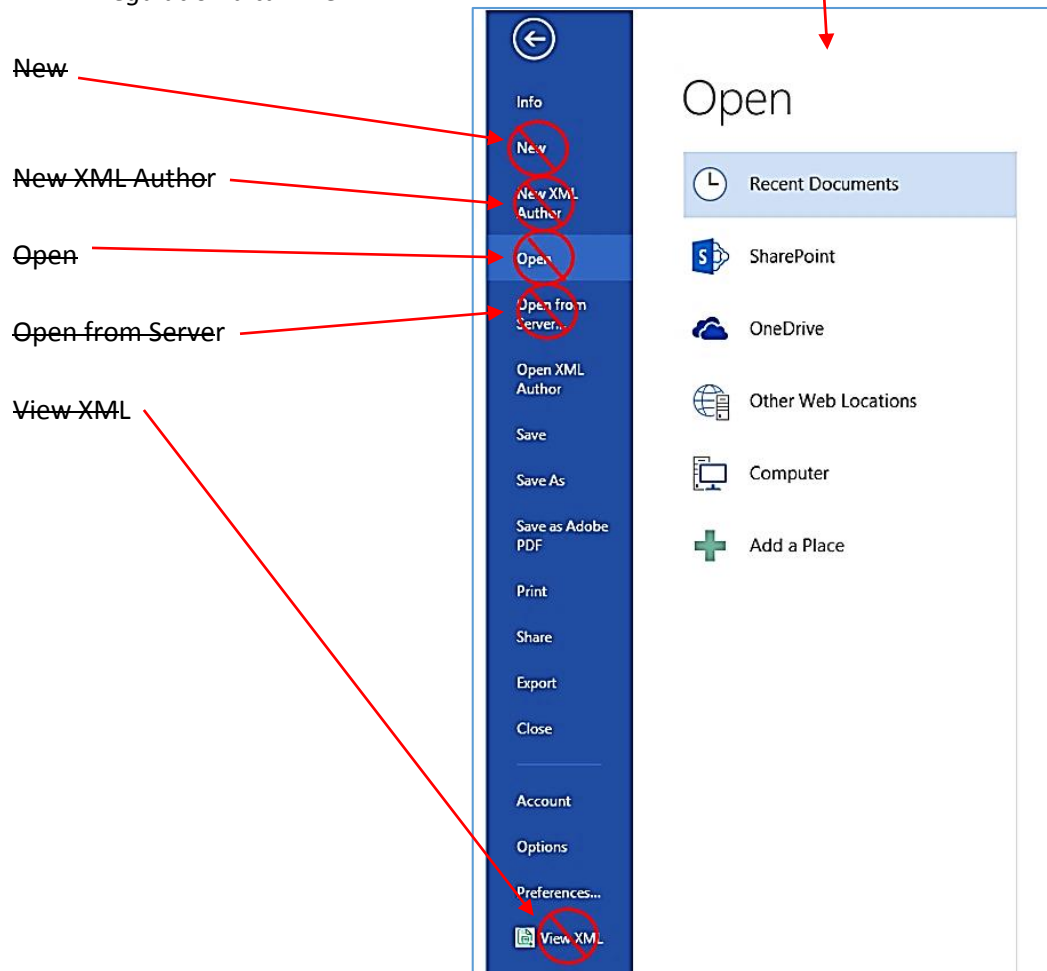
1. Right click on the filename *Proposed Regulation.dita*
2. Click "Check Out" on the dropdown menu
3. Check "Download the Document"
4. Select "Yes"
5. "Save" or "Save As" the downloaded file.
6. Open the file for editing

4.0   DETAILED PROCEDURE

  4.1   Do Not Use the Word Open Document Menu

   ⚠ **4.1.1   Do not** use Microsoft Word's "Open Document" <u>menu</u> to open a *Proposed Regulation.dita* file.

   ⚠ **4.1.2   Do not** use any of the following menu options to open a *Proposed Regulation.dita*   file:

  4.2   Check Your Word Preferences Settings

   ⚠ **4.2.1   Always** check that your Word Preferences Settings are correct before you check out, download and open a *Proposed Regulation.dita file.*[1]

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[1] If your Word Preferences are not set correctly, the PDF preview of your proposed regulation will not properly display and the system may hang up.

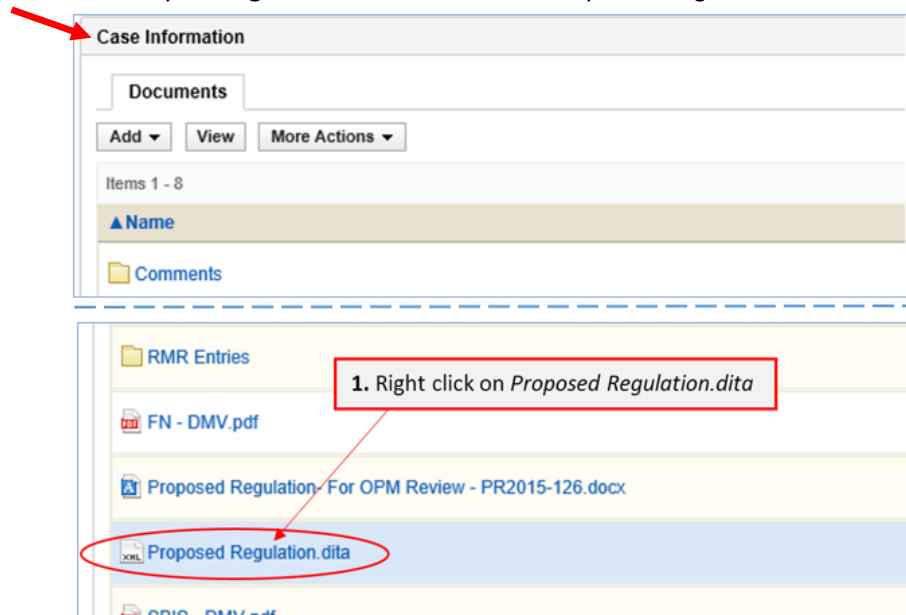This section will be added later or a direction to a separate page will be provided

4.3   Check Out *Proposed Regulation.dita* from ICM

4.3.1   Go to the ICM "Case Information" box
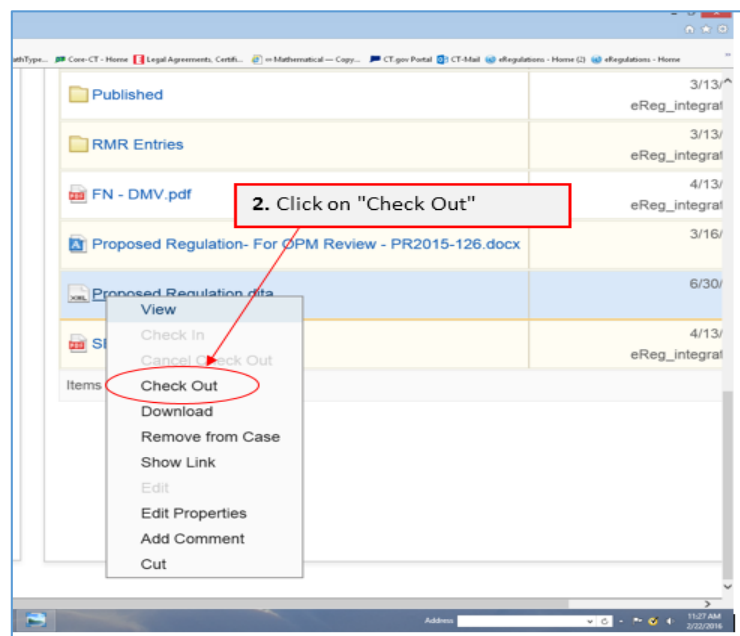
4.3.2   Locate the *Propoosed Regulation.dita* file associated with the case

4.3.3   Complete these steps:

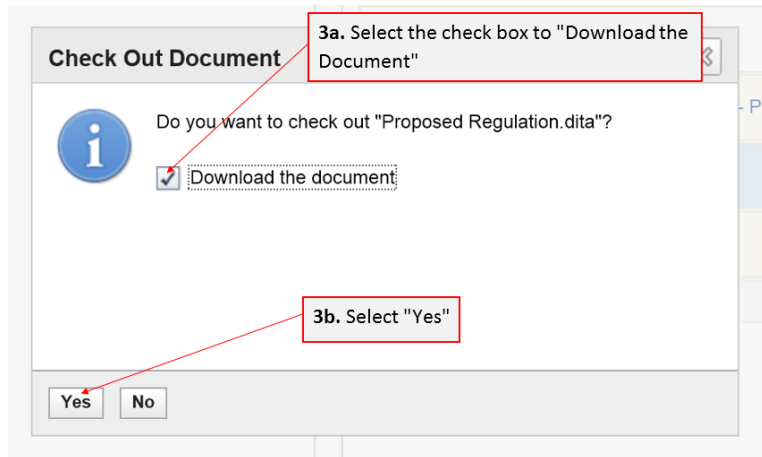*Step 1.* Right click on the filename *Proposed Regulation.dita*

Step 2. Click on "Check Out" when the drop down menu appears

Step 3. Respond to the "Check Out**"** dialog box

   a. Check "Download the Document"

   b. Click "Yes"

4.4   Save the File

4.4.1   After check out, a dialog box will show at the bottom of the screen asking

"Do you want to open or save **Proposed Regulation.dita** (#KB)
from i**cm.eregulations.ct.gov**?"

⚠ **4.4.2**   The *WRONG* answer is "Open"[2]

4.4.3   The *CORRECT* answer is "Save" or "Save as"
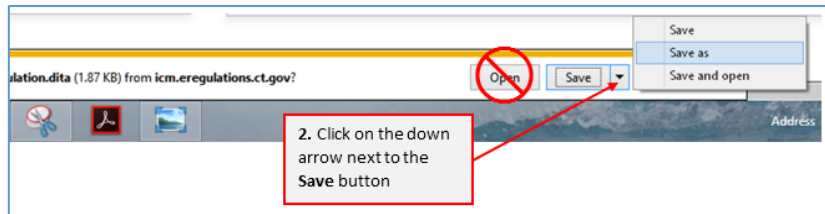
4.4.4   Complete these steps:

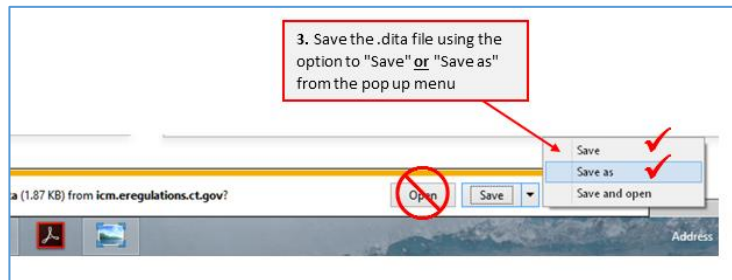*Step 1.* **Do not** open *Proposed Regulation.dita*

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[2] Opening a downloaded Proposed Regulation.dita file without out first saving it locally --either to your PC or a server--can cause system errors or corrupt the file

Step 2. Click on the down arrow next to the "Save" button

Step 3. Select "Save" or "Save as" to save the *.dita* file. ("Save and open" is a third option)

IMPORTANT NOTES:

Using "Save" will save the .dita file to your default download folder.

⚠ **SOTS recommends using "Save as"** in order to specify a folder location and unique name for your draft regulation. The file name will automatically remain *Proposed Regulation.dita* unless you change it.

⚠ **SOTS suggests** that your draft regulations folder be located on a shared drive or server rather than your local PC.

4.5   Open the File

4.4.1   After check out and download, a dialog box will show at the bottom of the screen indicating

"The **Proposed Regulation (#).dita** download has completed."

4.4.2   Complete this step:

Open the *.dita* file for editing.