

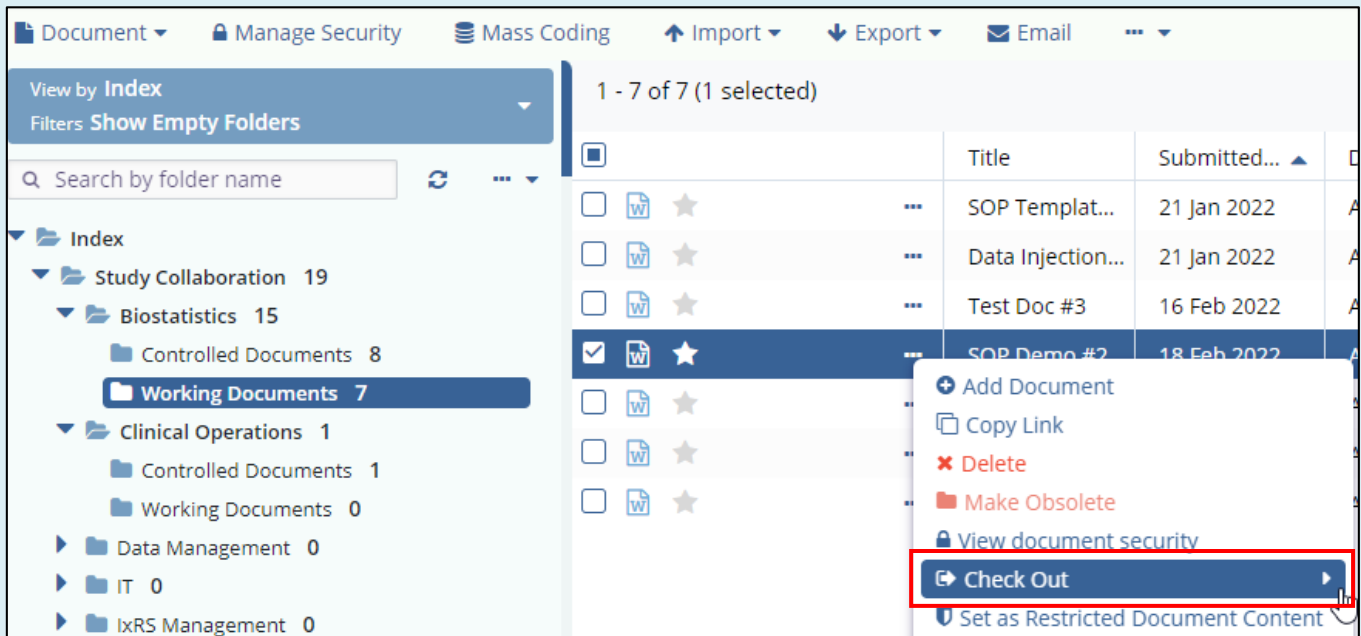
APPLICABLE TO:

- Administrators
- Collaborate
- Room Managers
- Editors
- eISF
- Readers

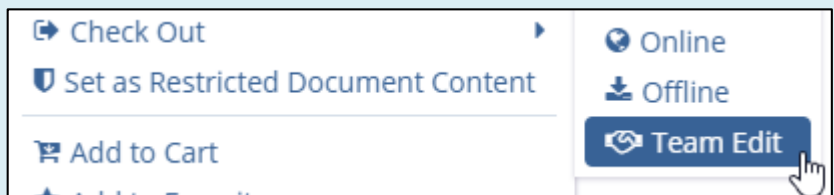
1. Locate the document you wish to edit in the Documents Library



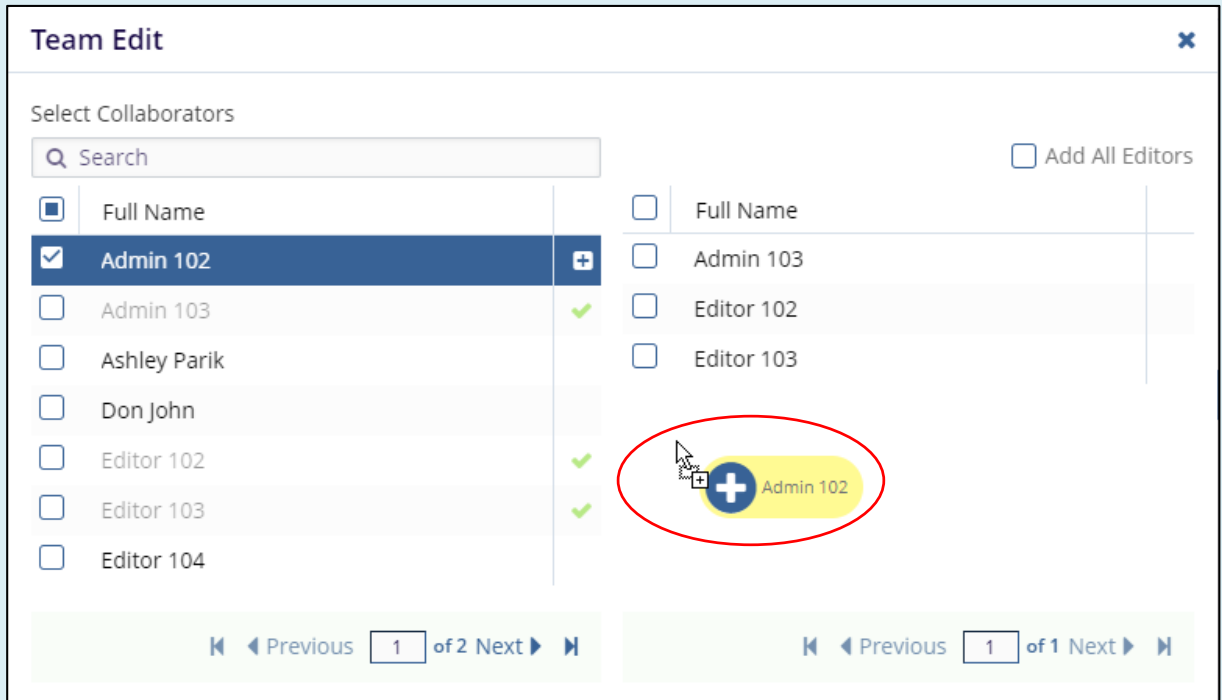
2a. Click on the **Document Action Menu** and expand the selection for **Check Out**



2b. Select **Team Edit**

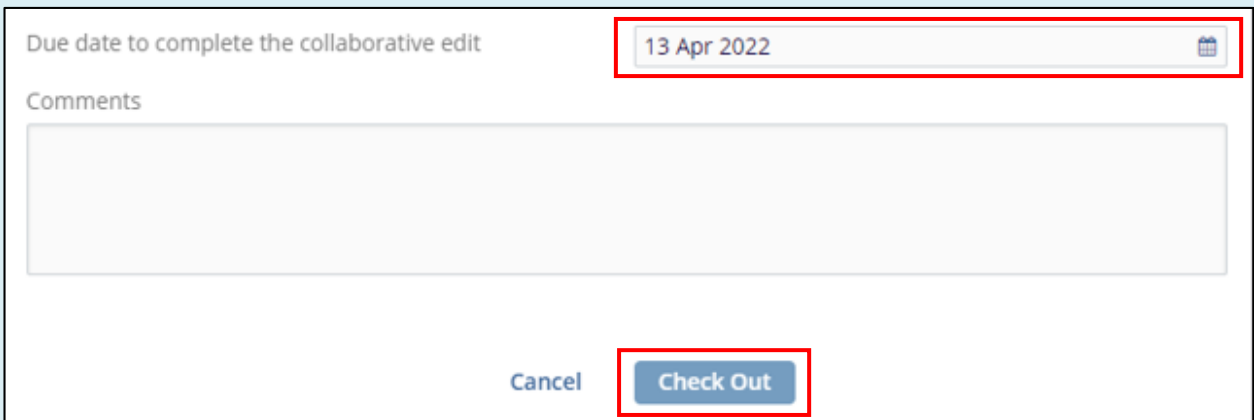


3. Next, in the Team Edit window, select the team members who will work on the document by adding them to the right-hand column.



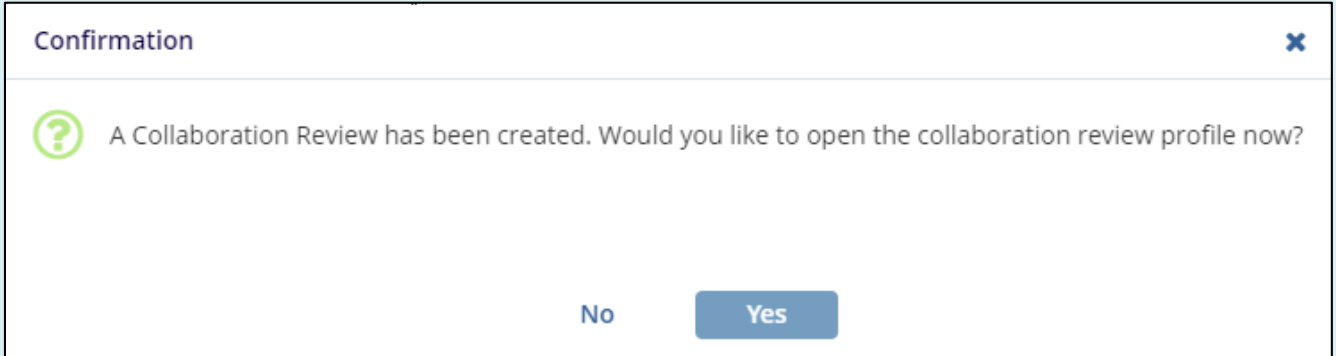
The screenshot shows the 'Team Edit' window with a 'Select Collaborators' section. On the left, a list of users includes 'Admin 102', 'Admin 103', 'Ashley Parik', 'Don John', 'Editor 102', 'Editor 103', and 'Editor 104'. 'Admin 102' is selected. On the right, a list of selected collaborators includes 'Admin 102', 'Admin 103', 'Editor 102', and 'Editor 103'. A red circle highlights the '+ Admin 102' button in the right column, indicating the action of adding the selected user to the team.

4. In the same window, assign a due date for the collaborative edit and, optionally, add comments for the team. Click **Check Out** to start the session.

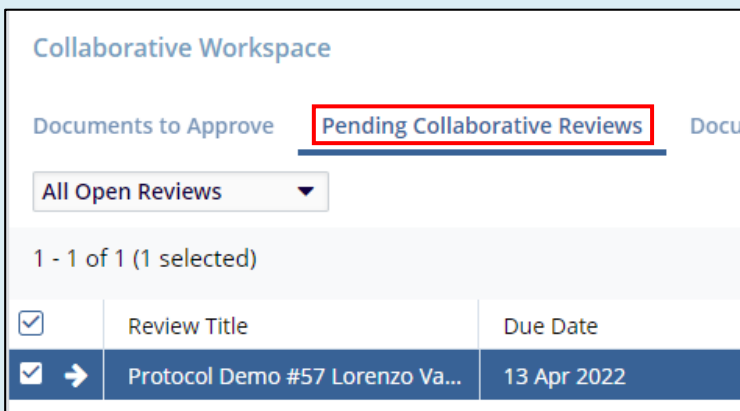
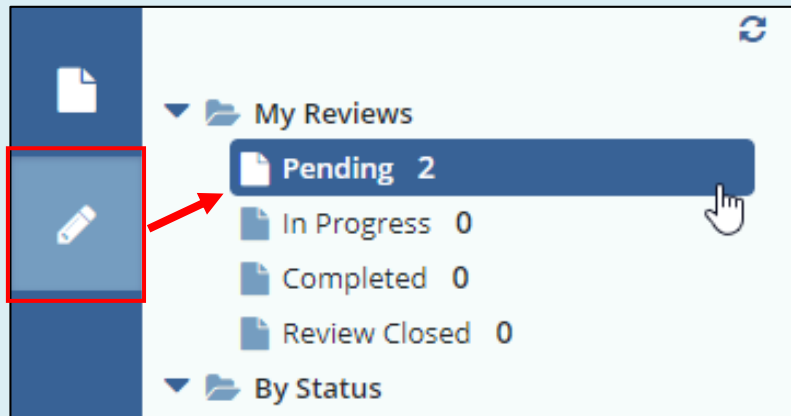


The screenshot shows the bottom section of the 'Team Edit' window. The 'Due date to complete the collaborative edit' field is set to '13 Apr 2022' and is highlighted with a red box. Below it is an empty 'Comments' text area. At the bottom, there are two buttons: 'Cancel' and 'Check Out', with the 'Check Out' button highlighted by a red box.

5. You can start editing immediately, or leave it for later




Should you wish to edit at a later time, you can find your document under your **'Pending'** reviews in the **Collaborate** module...



..and also in your Dashboard, in **Collaborative Workspace**, under **Pending Collaborative Reviews**

6. In **Team Edit**, changes can be made in real-time by many users. Here's an example of what that would look like

 Demo Doc #5	ID: 341687	
	VER. 0.3	PAGE: 2 of 2
	DOCUMENT TYPE: <u>Biostats</u>	

1.0 INTRODUCTION & PURPOSE

Here are the changes that Editor 104 is making.

Here are the changes that I'm making as Admin 103

2.0 SCOPE

3.0 RESPONSIBILITIE

4.0 DEFINITIONS

5.0 PROCEDURES

Here are the changes that Editor 107 is making

5.1 Process Overview

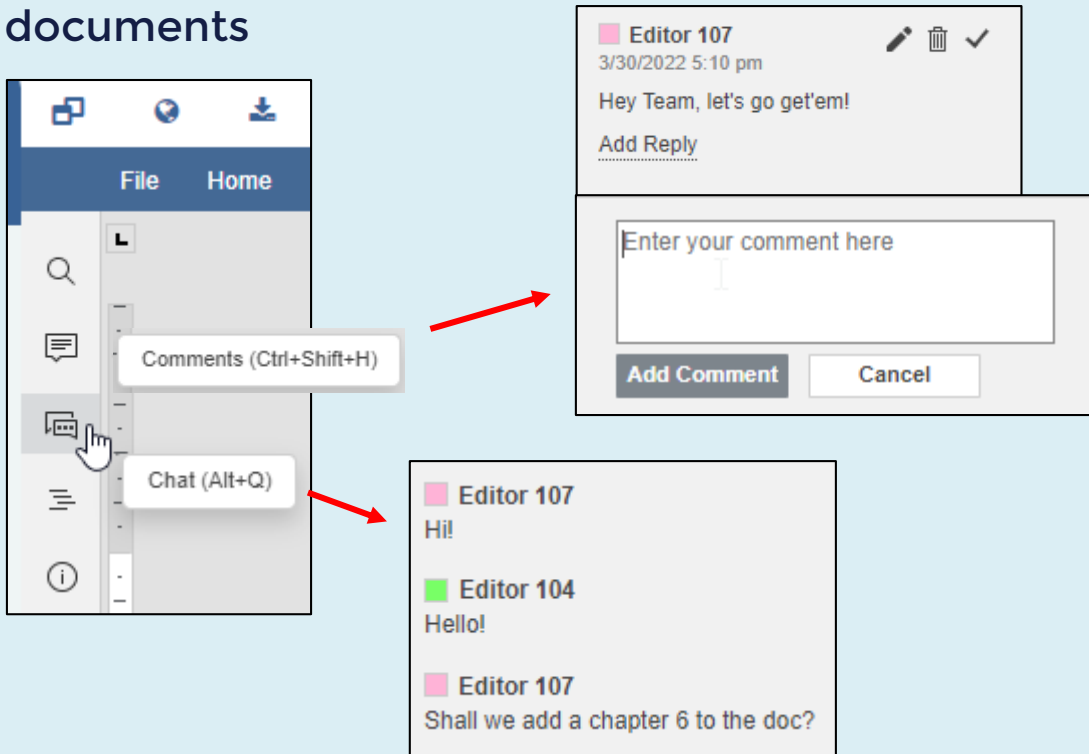
5.2 Entry Criteria

5.3 Recommended Tools

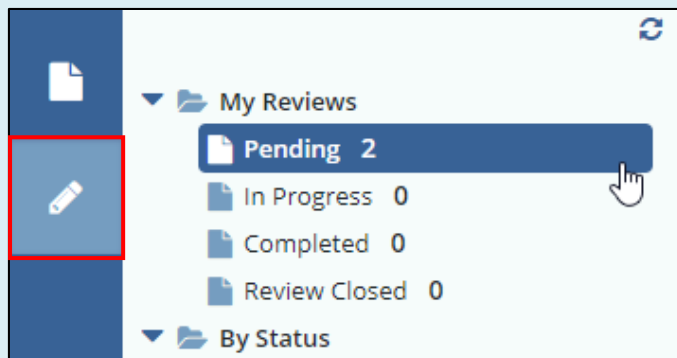


The color-coded text was added for clarity and does not reflect default working conditions.

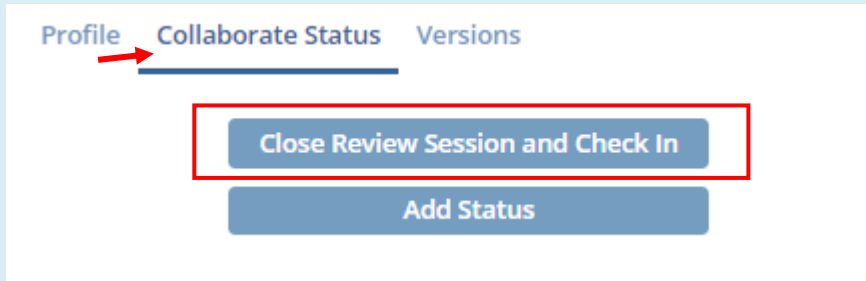
7. The collaborative interface allows you to leave comments or even chat with other editors while you work on your documents



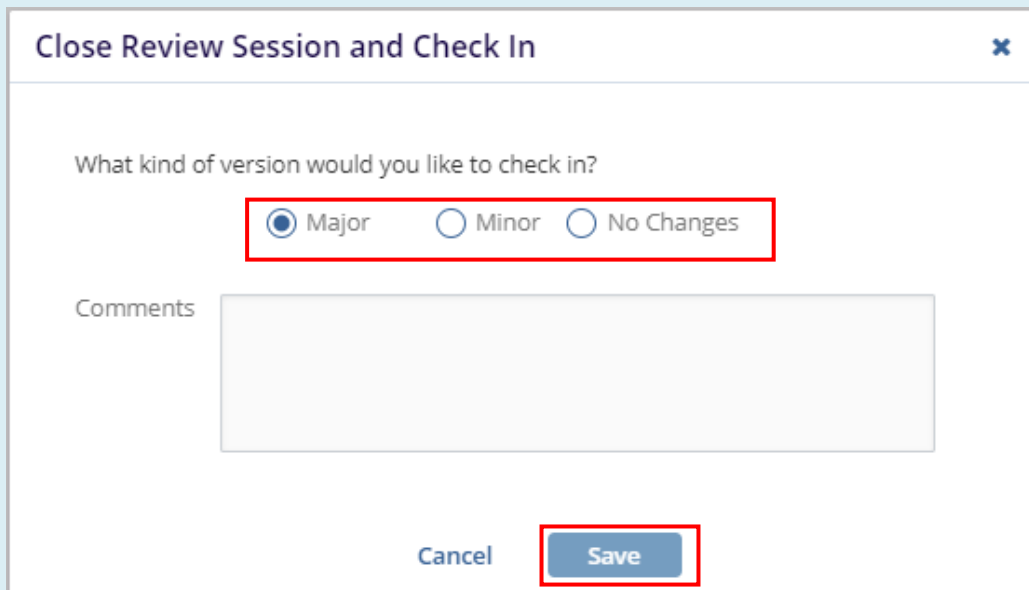
8. When you are done editing the document, you can close the review. To do this, navigate to your Pending Reviews in the **Collaborate** module



9. Select the document you wish to close Team Edit for, then switch to **Collaborate Status** in the metadata pane. Click on **Close Review Session and Check In**



10. Choose the kind of version change and press **Save** to close the session.




The document now shows under 'Completed' reviews in the Collaborate module.