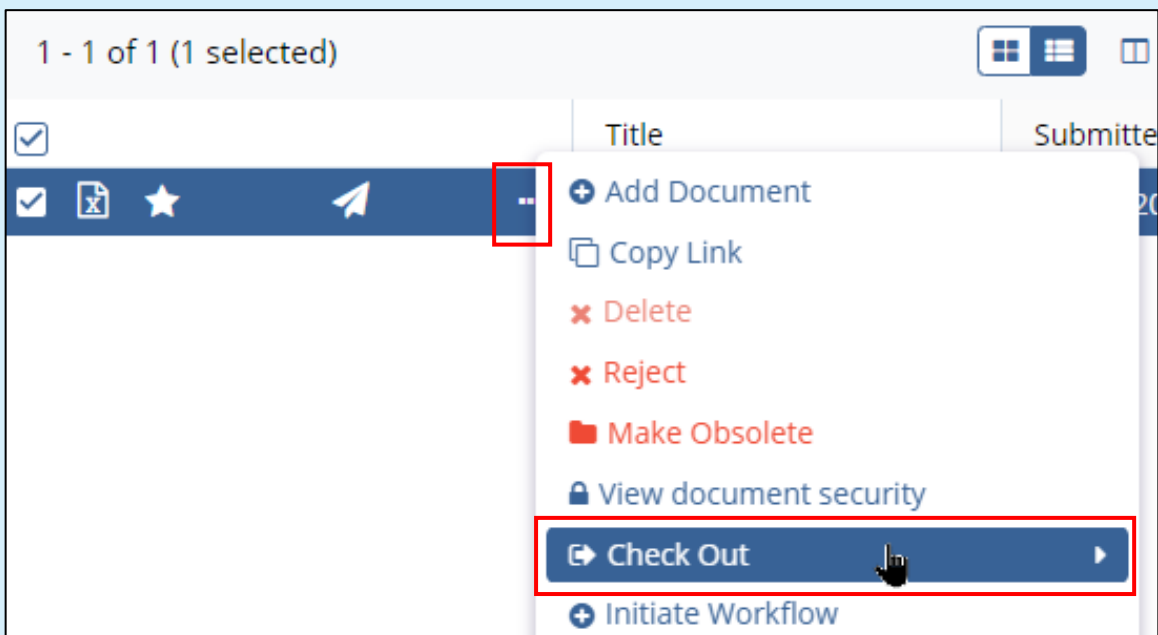**TRIAL INTERACTIVE**

APPLICABLE TO:

- ● Administrators
- ● Room Managers
- ● Editors
- ○ Readers

- ● Collaborate
- ○ eISF

Some users have reported difficulty in getting Excel files through signature in a Collaborate workflow. If you experience difficulties with that process, the steps detailed in this document could help.
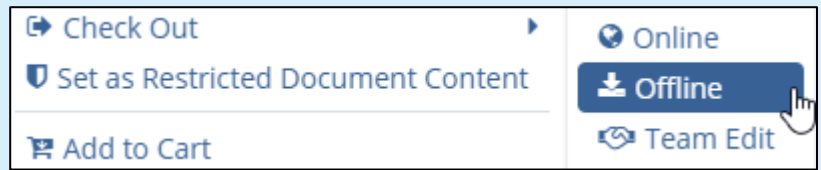
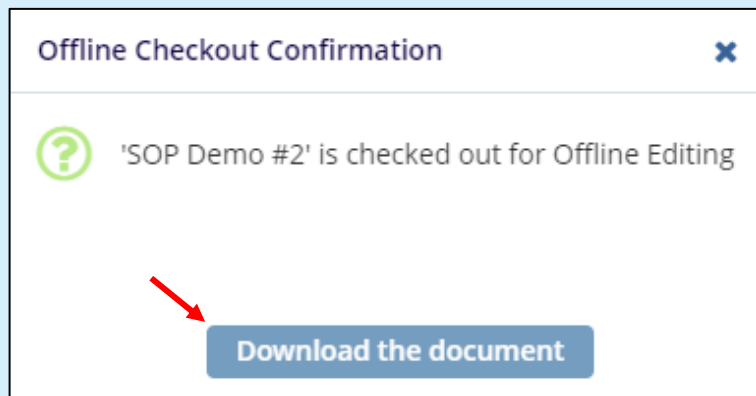## 1. Locate the document you wish to edit in the Documents Library.
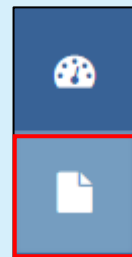
2a. Click on the **Document Action Menu** and expand the selection for **Check Out.**
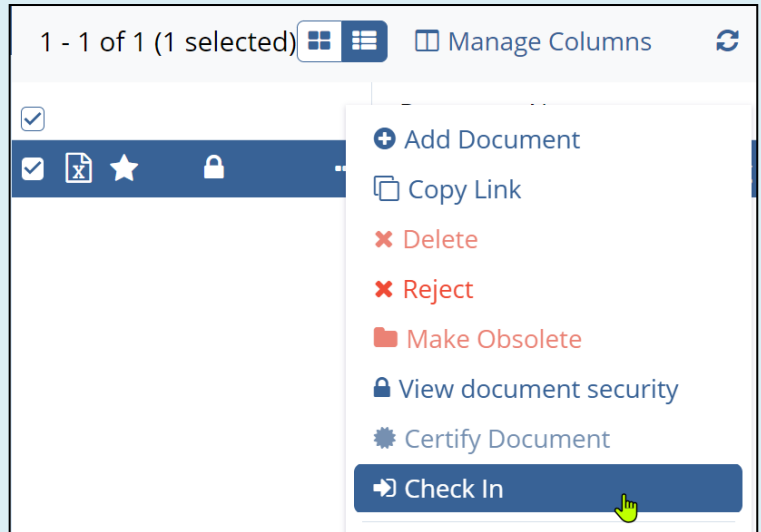
2b. Select **Offline** Edit.

➡ Check Out ▶	🌐 Online
🛡 Set as Restricted Document Content	⬇ **Offline**
🛒 Add to Cart	🔄 Team Edit

3. Download the document.

Offline Checkout Confirmation ✕

❓ 'SOP Demo #2' is checked out for Offline Editing

Download the document

4. Locate the document on your device. Using your software of choice, convert to or save the document as PDF.

File name: Excel File to Sign
Save as type: PDF

Printer ⓘ
Adobe PDF
Ready
Printer Properties

PDF
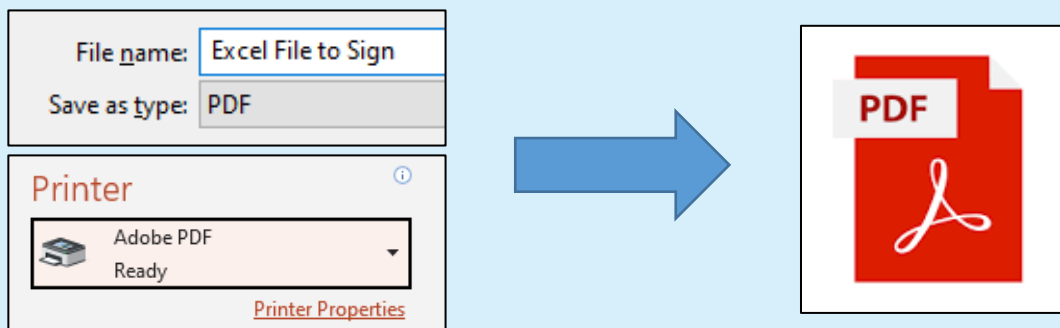
5. Return to TI Collaborate. Select the document options once again and choose **Check In**.

6. The Check In popup appears. Complete the information and click **Save**.

7. Proceed with the document workflow as normal.