

# How to Initiate and Perform Team Edits

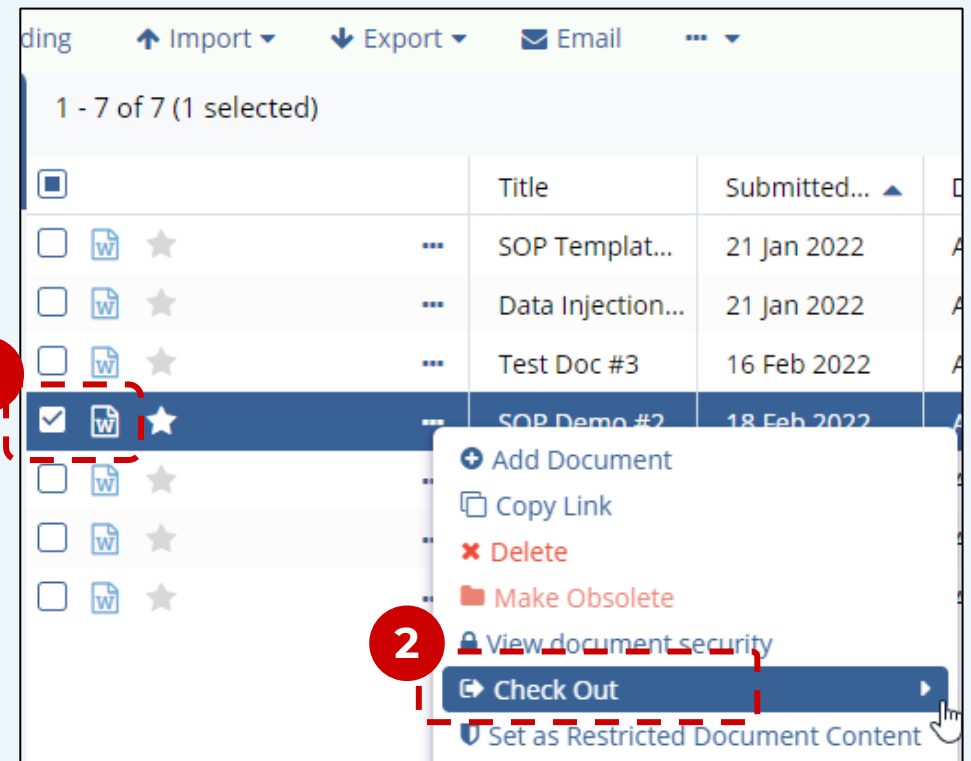
TI version 10.6

## APPLICABLE TO:

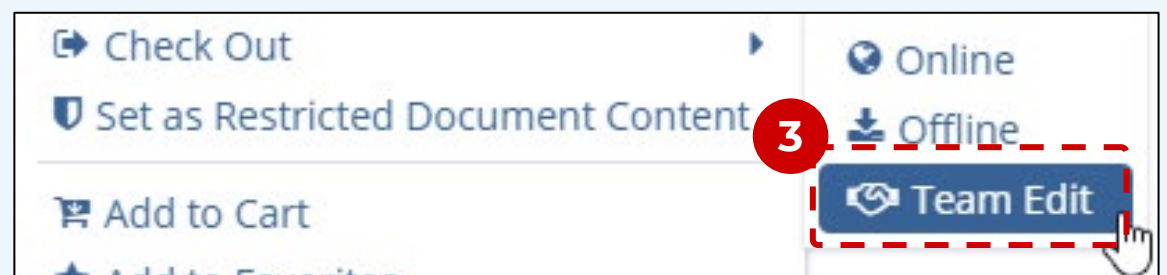
- Admin
- Manager
- Editor
- Reader
- Collaborate
- eISF

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

**2** Open the **Document Action Menu** and expand the selection for Check Out.

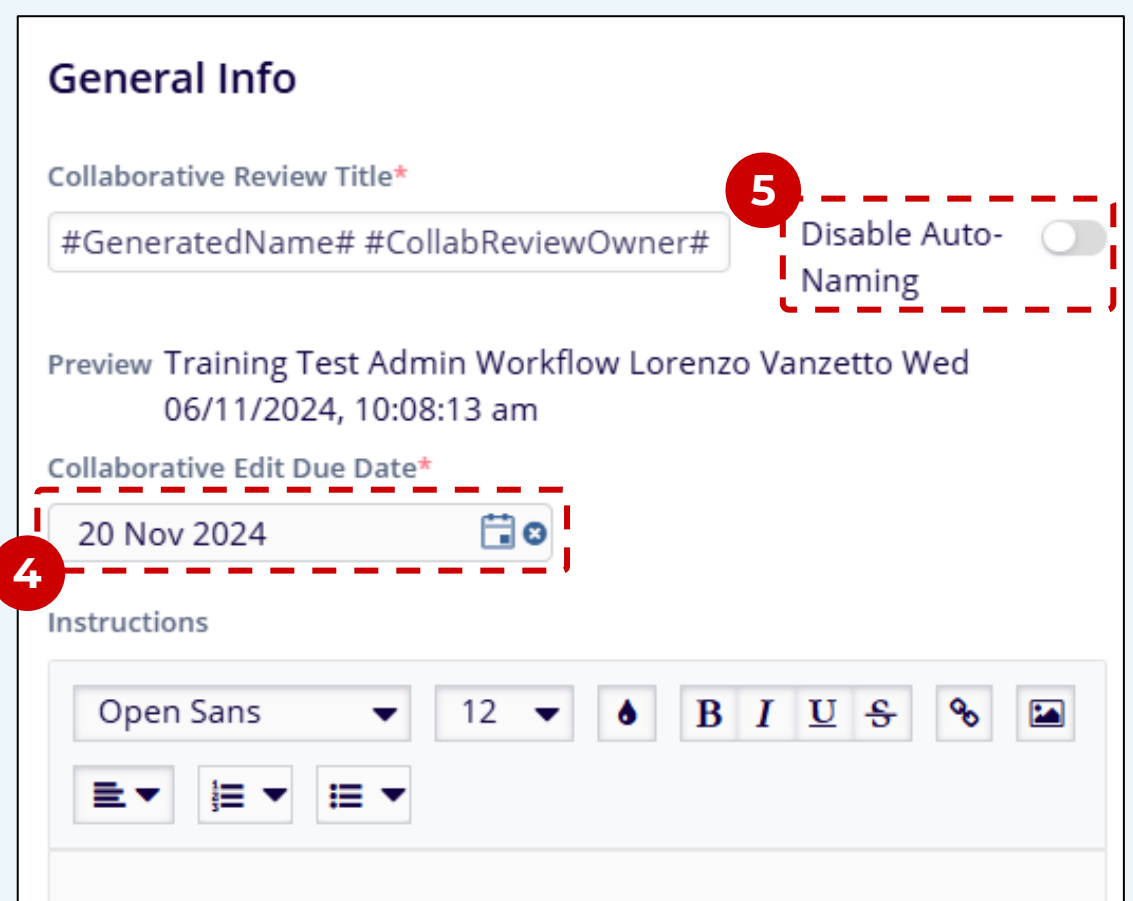


**3** Select **Team Edit**.



**4** Review the *General Info* and assign a **Due Date**. A default date is provided.

**5** If you wish to personalize the Review Title, you can **Disable Auto-Naming**.

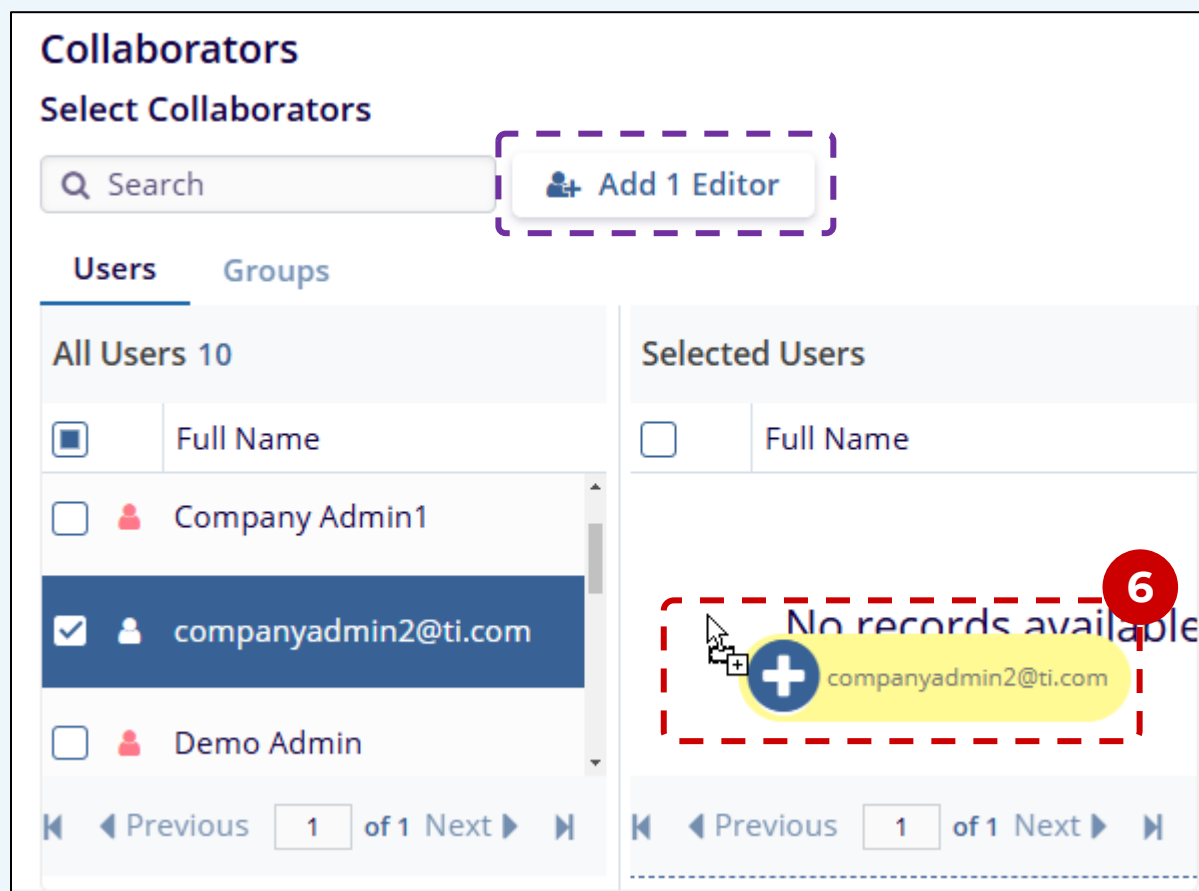


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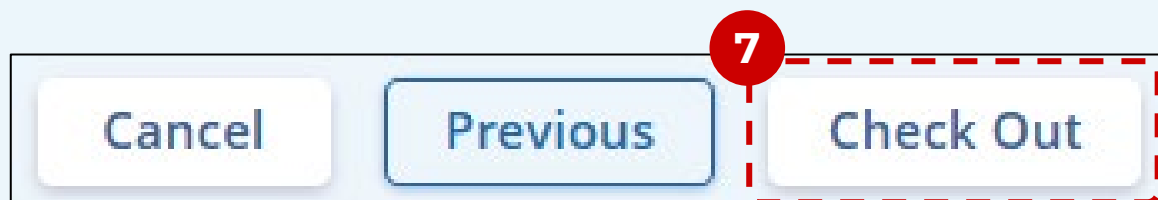
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**6** In the next section, **select Collaborators** who will have access to this edit, by moving names from left to right.

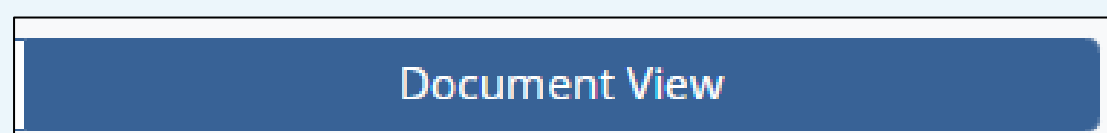
There is a helpful button to add all available Editors in one click.



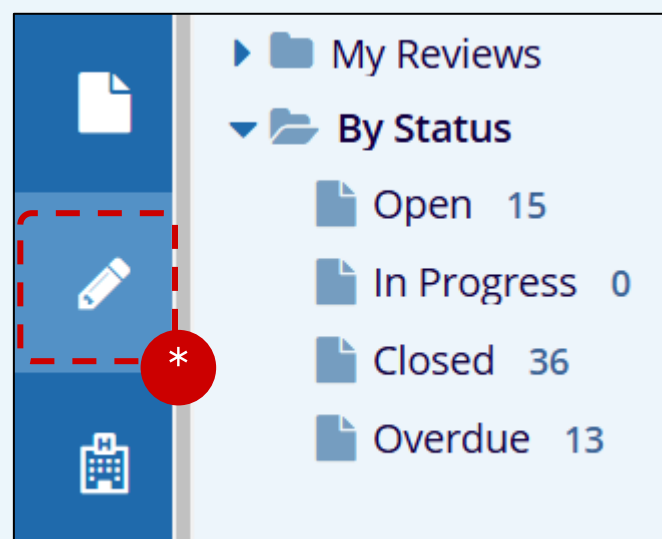
**7** Click **Check Out** to start the edit.



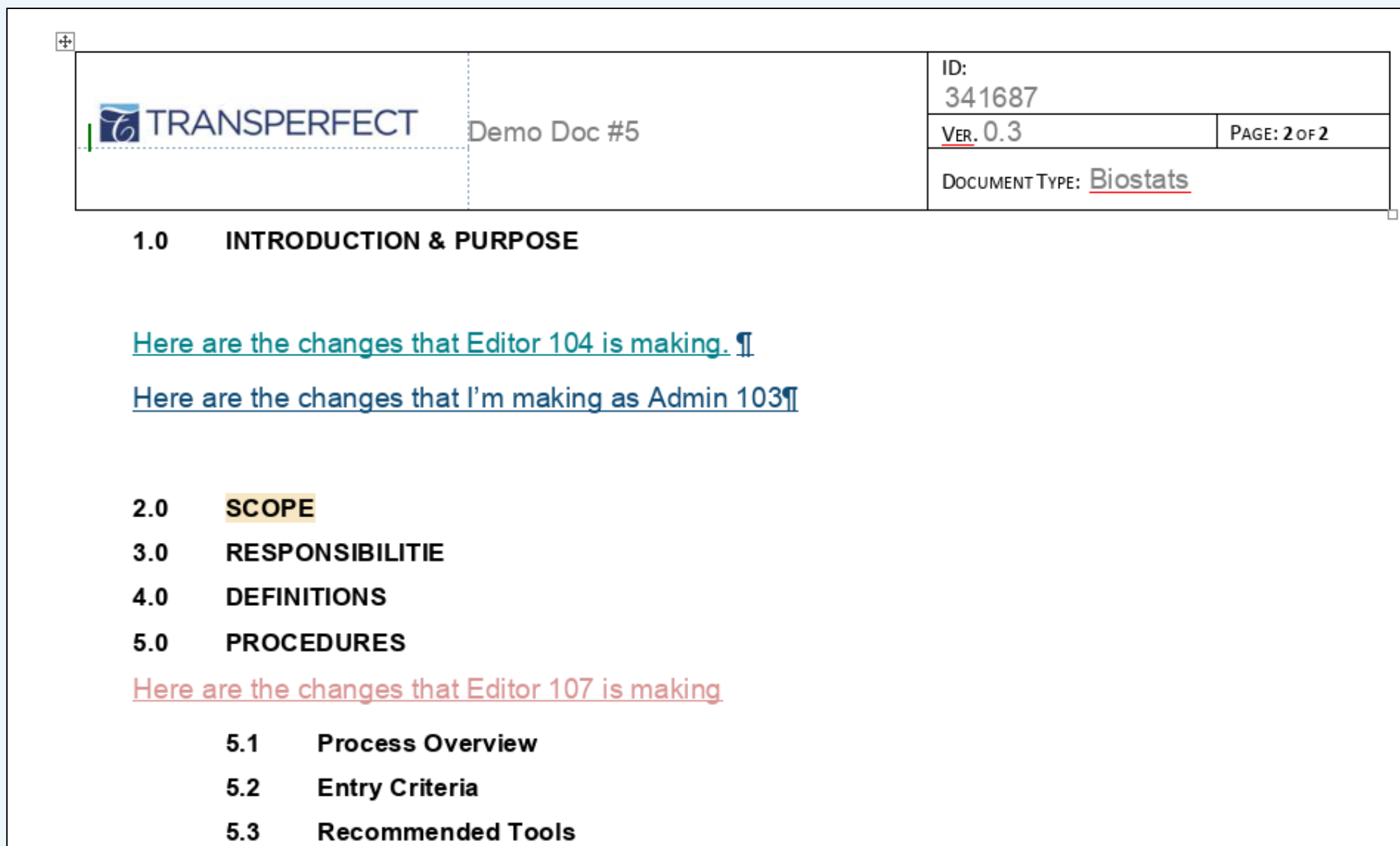
**8** Enter the **Document View** to access the document in edit mode.



Documents open for collaborative editing can be found under 'Pending', 'Open', or 'In Progress' in the **Collaborate** module\*.

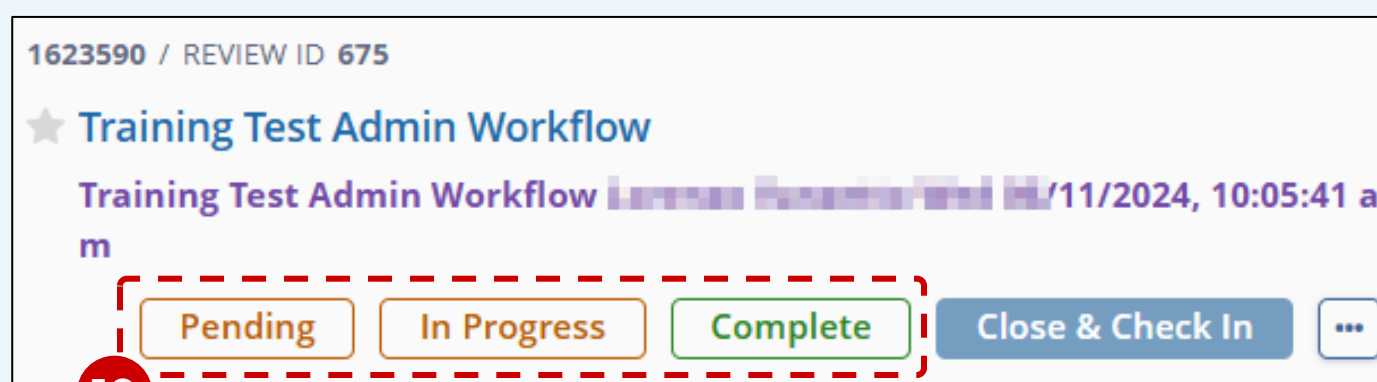


**9** In the edit window, changes can be made in real-time by multiple users. Here's an example of what that would look like, with each contributor marked in different ink.



The screenshot shows a document editor interface. At the top, there is a header area with the TransPerfect logo and the text "Demo Doc #5". To the right of the header, there is a metadata panel with the following information: ID: 341687, VER. 0.3, PAGE: 2 OF 2, and DOCUMENT TYPE: Biostats. Below the header, the document content is displayed. The first section is "1.0 INTRODUCTION & PURPOSE". Under this section, there are two lines of text: "Here are the changes that Editor 104 is making." and "Here are the changes that I'm making as Admin 103". The second section is "2.0 SCOPE". Below this, there is a list of sections: "3.0 RESPONSIBILITIE", "4.0 DEFINITIONS", and "5.0 PROCEDURES". Under "5.0 PROCEDURES", there is a list of sub-sections: "5.1 Process Overview", "5.2 Entry Criteria", and "5.3 Recommended Tools". The text "Here are the changes that Editor 107 is making" is highlighted in red.

**10** Users can **update the review status** in the metadata panel, and the Review Owner can close the edit there.



The screenshot shows a review status panel. At the top, it displays "1623590 / REVIEW ID 675". Below this, there is a star icon and the text "Training Test Admin Workflow". Underneath, it says "Training Test Admin Workflow" followed by a date and time: "11/11/2024, 10:05:41 a m". At the bottom of the panel, there are four buttons: "Pending", "In Progress", "Complete", and "Close & Check In". The "Complete" button is highlighted with a red dashed box and a red circle containing the number "10".