

APPLICABLE TO:

- Administrators
- Collaborate
- Room Managers
- eISF
- Editors
- 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**

Document | Manage Security | Mass Coding | Import | Export | Email

View by Index | Filters Show Empty Folders

Search by folder name

1 - 7 of 7 (1 selected)

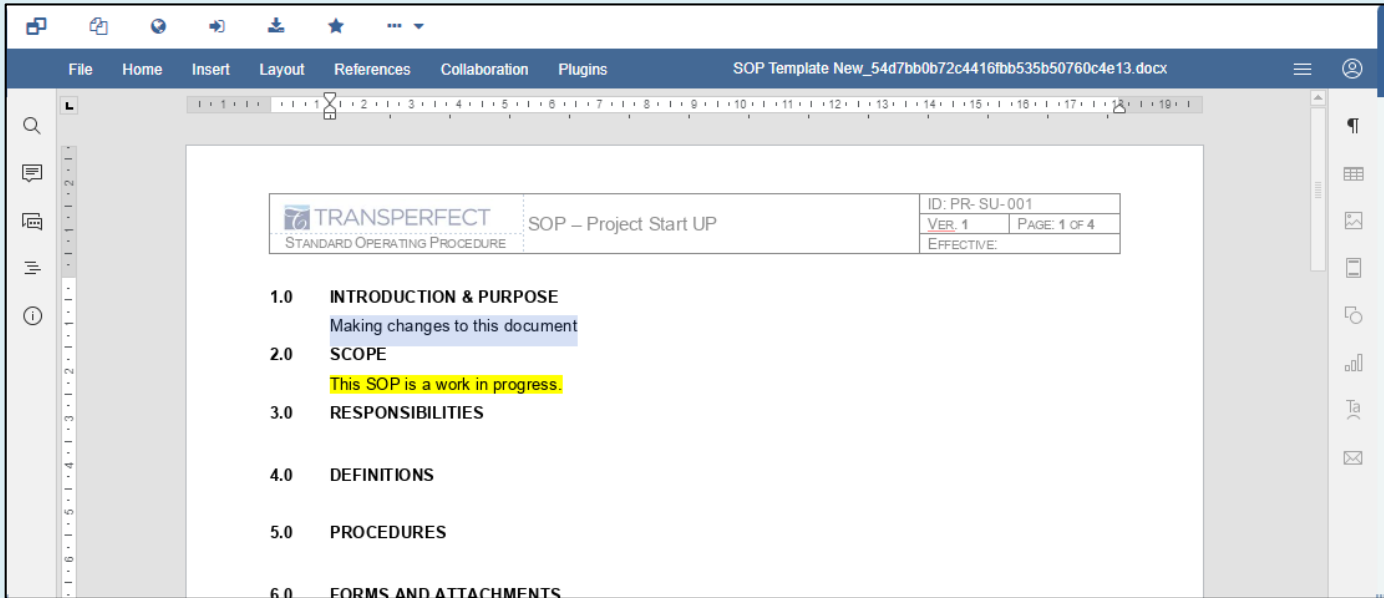
	Title	Submitted...
<input type="checkbox"/>	SOP Templat...	21 Jan 2022
<input type="checkbox"/>	Data Injection...	21 Jan 2022
<input type="checkbox"/>	Test Doc #3	16 Feb 2022
<input checked="" type="checkbox"/>	SOP Demo #2	18 Feb 2022
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

- ➕ Add Document
- 🔗 Copy Link
- ✖ Delete
- 🗑 Make Obsolete
- 🔒 View document security
- 🔒 Check Out**
- 🔒 Set as Restricted Document Content

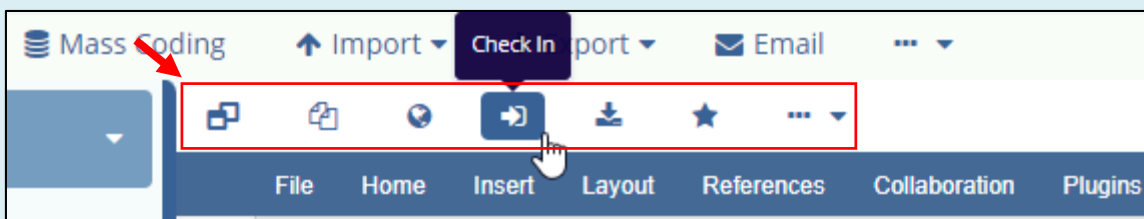
2b. Select **Online Edit**


- 🔒 Check Out
- 🔒 Set as Restricted Document Content
- 🛒 Add to Cart
- 🌐 Online
- 📄 Offline
- 👥 Team Edit

3. The built-in document editor will open in Document View. You are now able to make changes directly on the document



4. When you are satisfied with the changes you made, go to the Document View action bar and select **Check In**



 While checked out, the document stays locked preventing others from making changes to it until it is checked in.

5. When you are satisfied with the changes you made, go to the Document View action bar and select **Check In**