

# How to Initiate and Perform Team Edits

TI version 10.8

- APPLICABLE TO:
- Admin

Manager

Editor

Reader

Collaborate

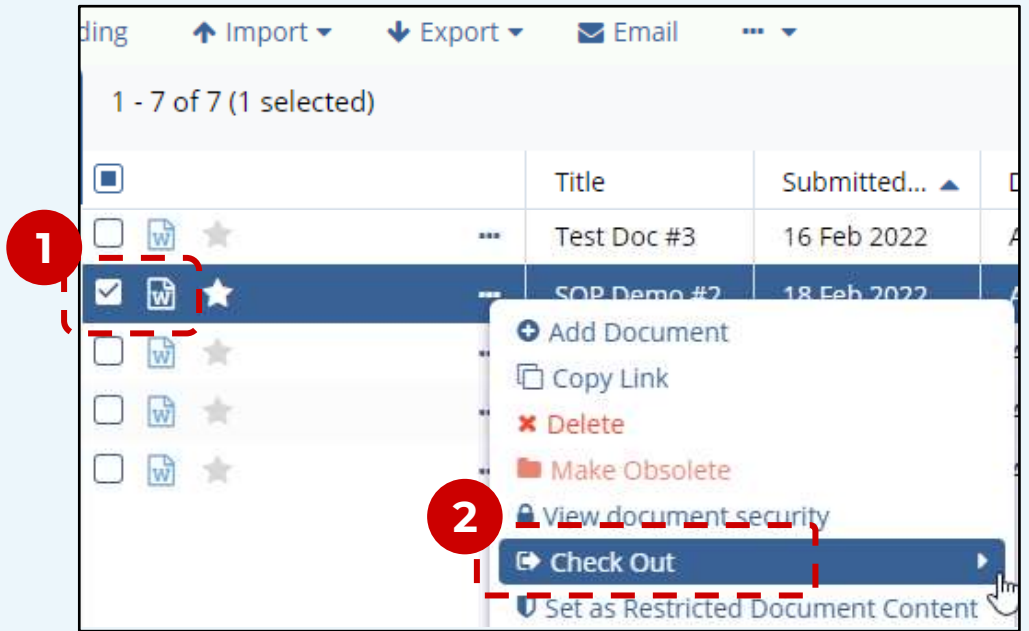
eISF

Team Edits, aka Collaborative Reviews, refers to open online editing sessions involving multiple users, who can all work on the same document and see changes in real time.

- 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

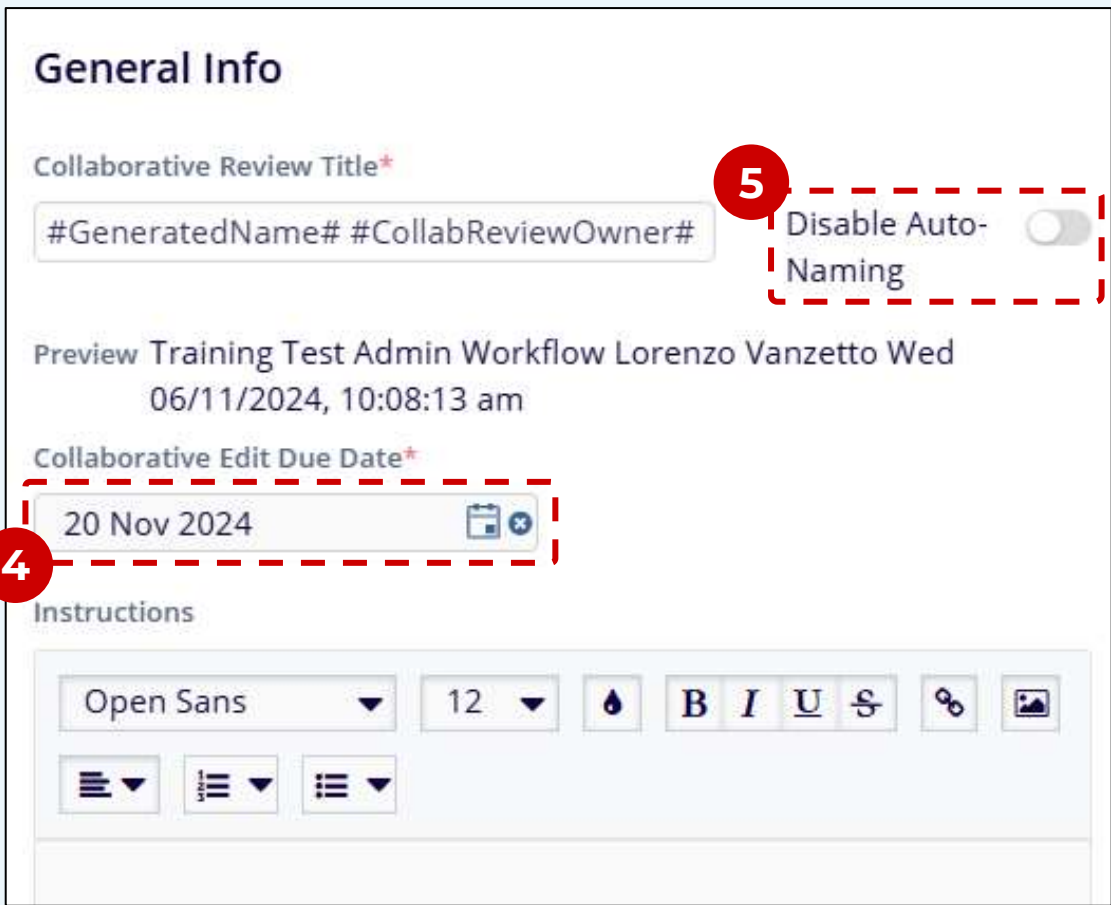
Among the Check Out options, Select **Team Edit**.



- 4

Review the *General Info* and assign a **Due Date**. A default date is provided by the system.
- 5

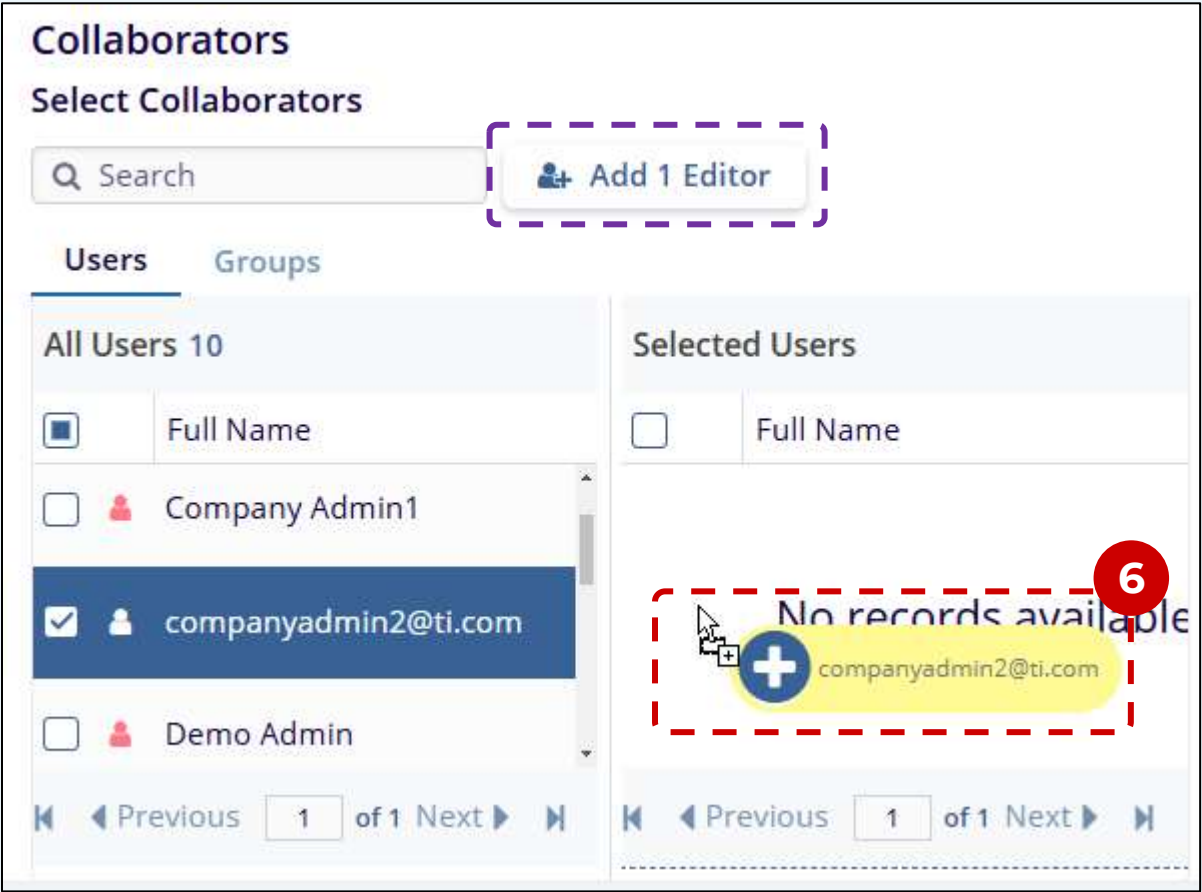
If you wish to personalize the Review Title, you can **Disable Auto-Naming**.



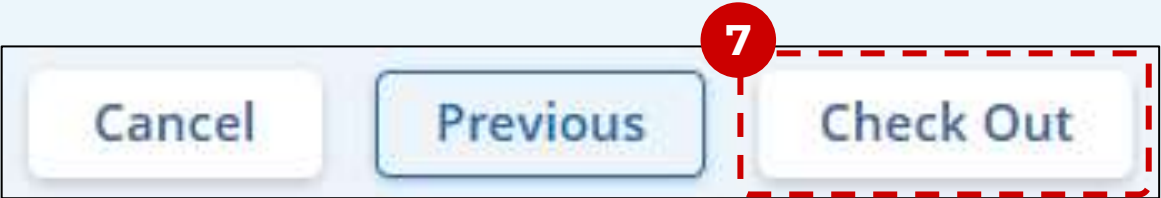
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**6** In the next section, **select Collaborators** who will have access to this edit, by moving names from left to right.

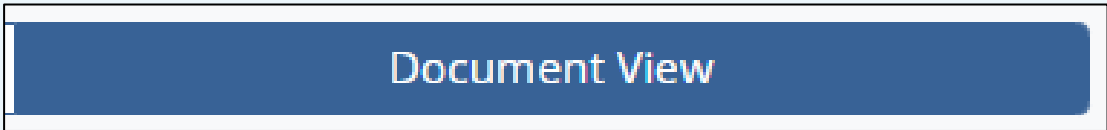
 There is a helpful button to add all available Editors in one click.




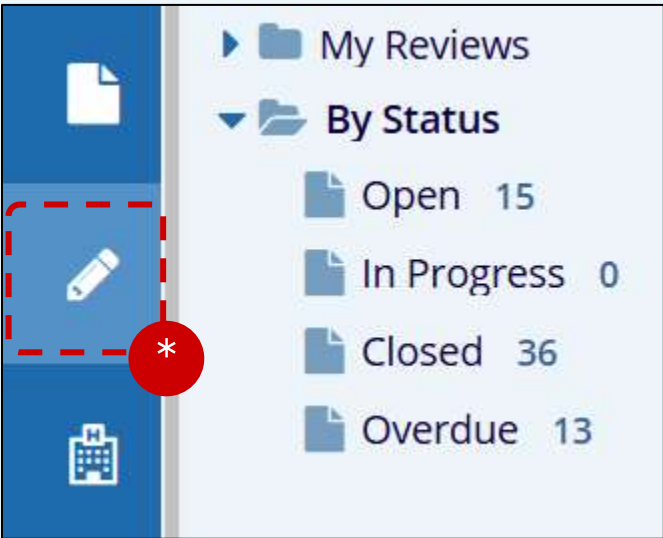
**7** Click **Check Out** to start the edit.



**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\*.



 TRIAL  
INTERACTIVE

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- 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.

	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 RESPONSIBILITIES**

**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**

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

1623590 / REVIEW ID 675

★ Training Test Admin Workflow

Training Test Admin Workflow [REDACTED] /11/2024, 10:05:41 a  
m

Pending In Progress Complete Close & Check In ...