

How to Initiate and Perform Team Edits

TI version 10.8

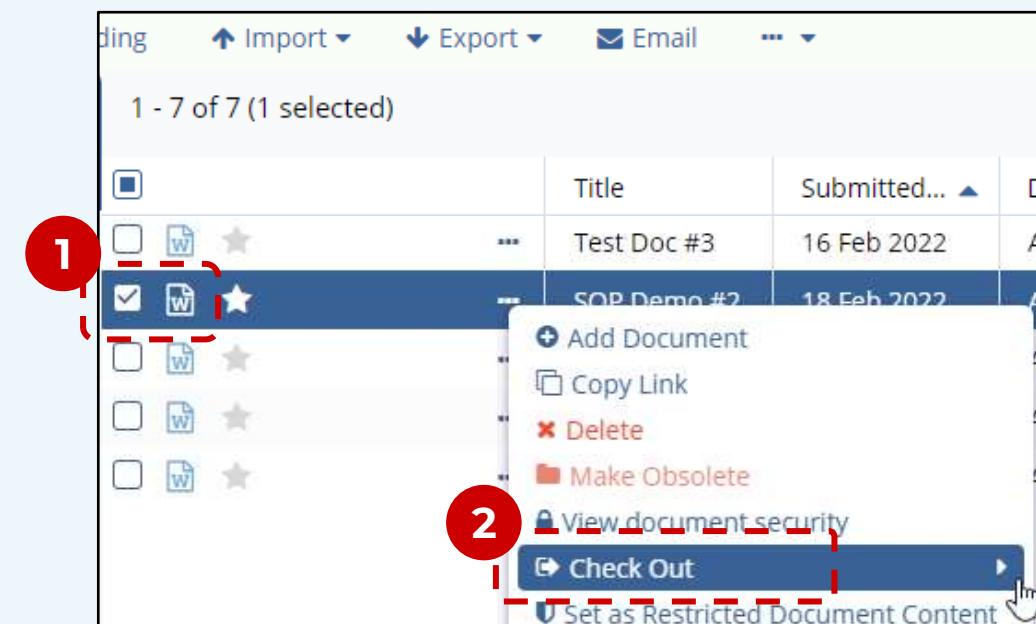
APPLICABLE TO:

- 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.

General Info

Collaborative Review Title*
#GeneratedName# #CollabReviewOwner#

Preview Training Test Admin Workflow Lorenzo Vanzetto Wed 06/11/2024, 10:08:13 am

Collaborative Edit Due Date*
20 Nov 2024

Instructions

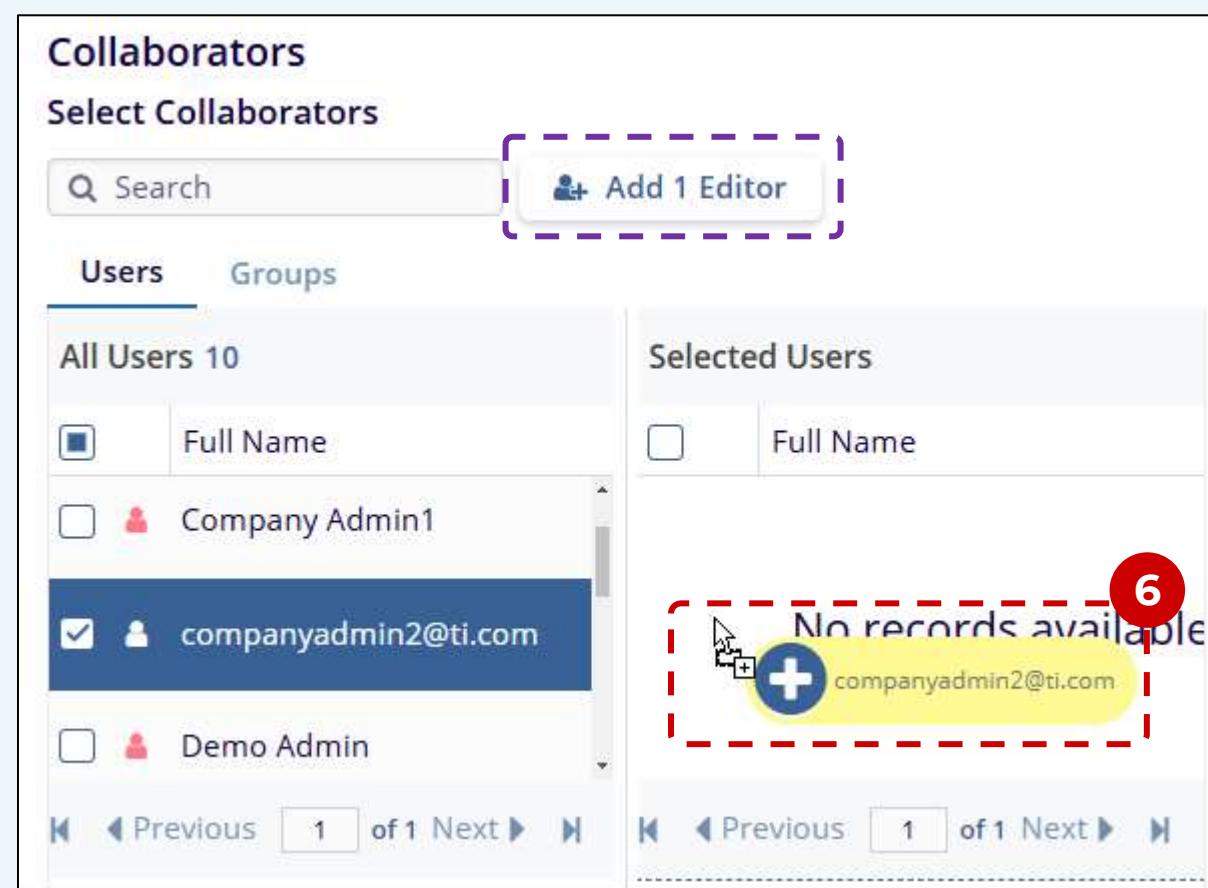
Font: Open Sans, Size: 12, Bold, Italic, Underline, Strike, Bullets, Numbers, Insert, Image

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

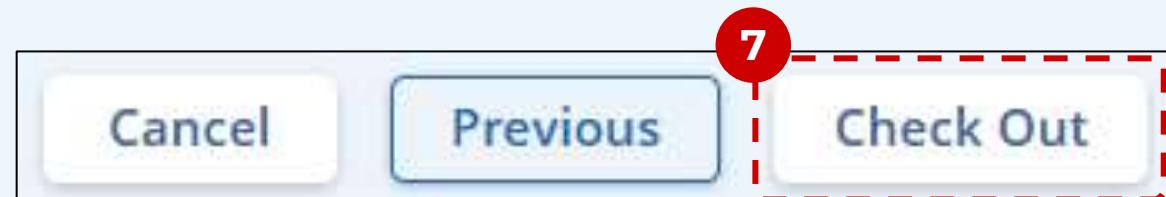
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6 In the next section, **select** **Collaborators** who will have access to this edit, by moving names from left to right.

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



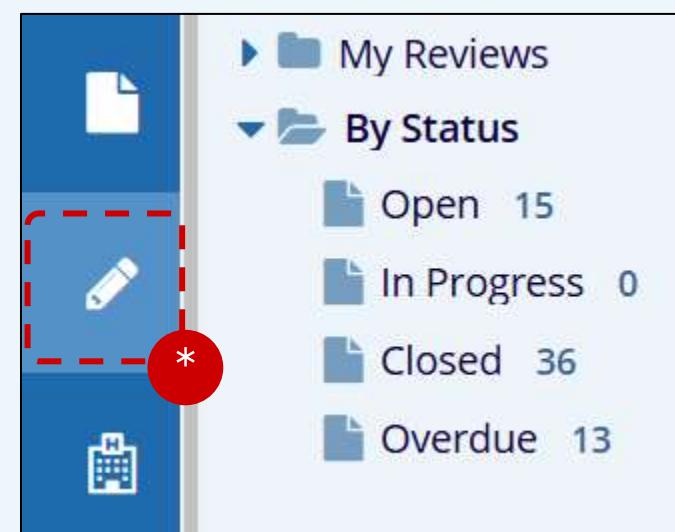
7 Click **Check Out** to start the edit.



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



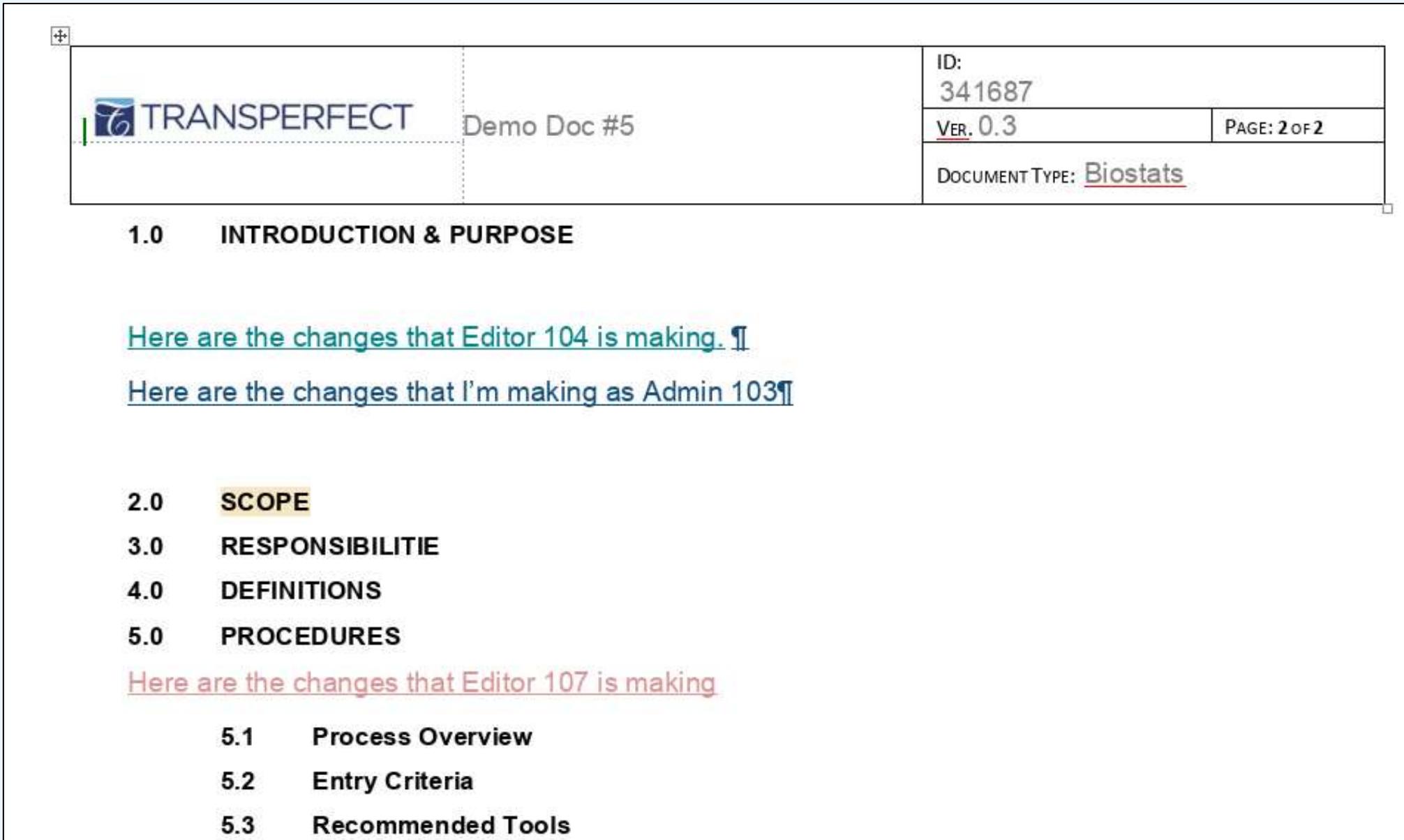
 Documents open for collaborative editing can be found under 'Pending', 'Open', or 'In Progress' in the **Collaborate** module*.



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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.



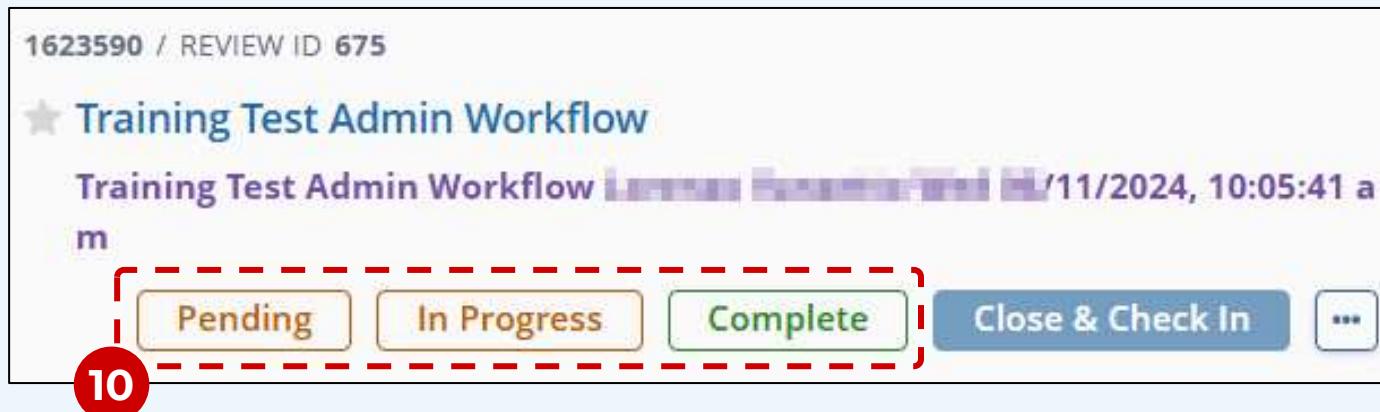
The screenshot shows a document titled "Demo Doc #5" with the following details in the header:

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

The document content includes:

- 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.



The screenshot shows the "Review ID 675" metadata panel with the following details:

1623590 / REVIEW ID 675

★ Training Test Admin Workflow

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

Pending In Progress Complete Close & Check In ...

A red circle with the number "10" is overlaid on the "Pending" status button.