

How to Initiate and Perform Team Edits

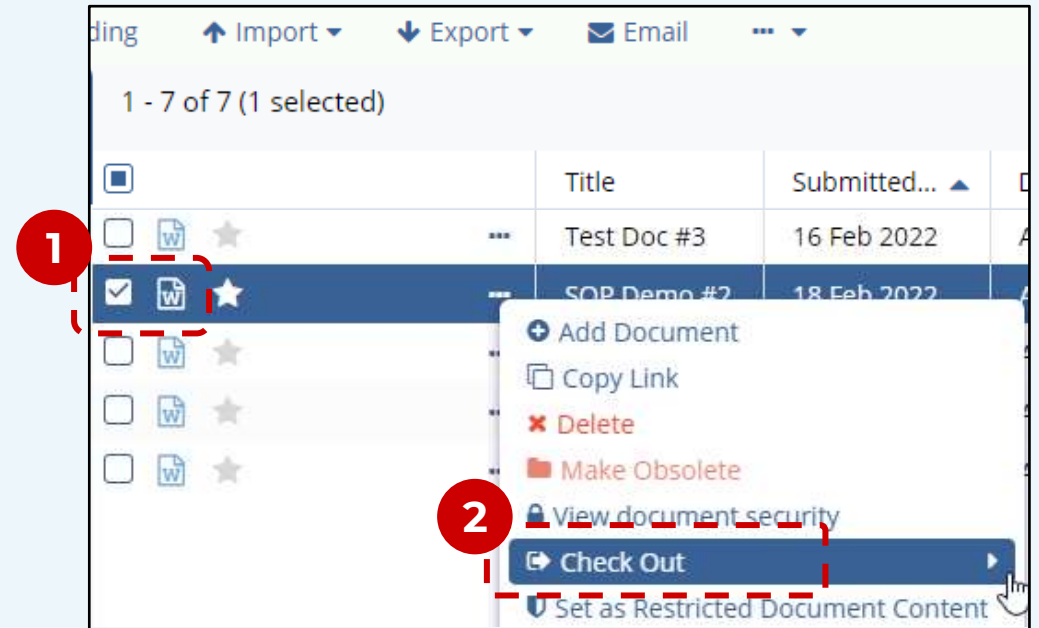
TI version 10.8

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.



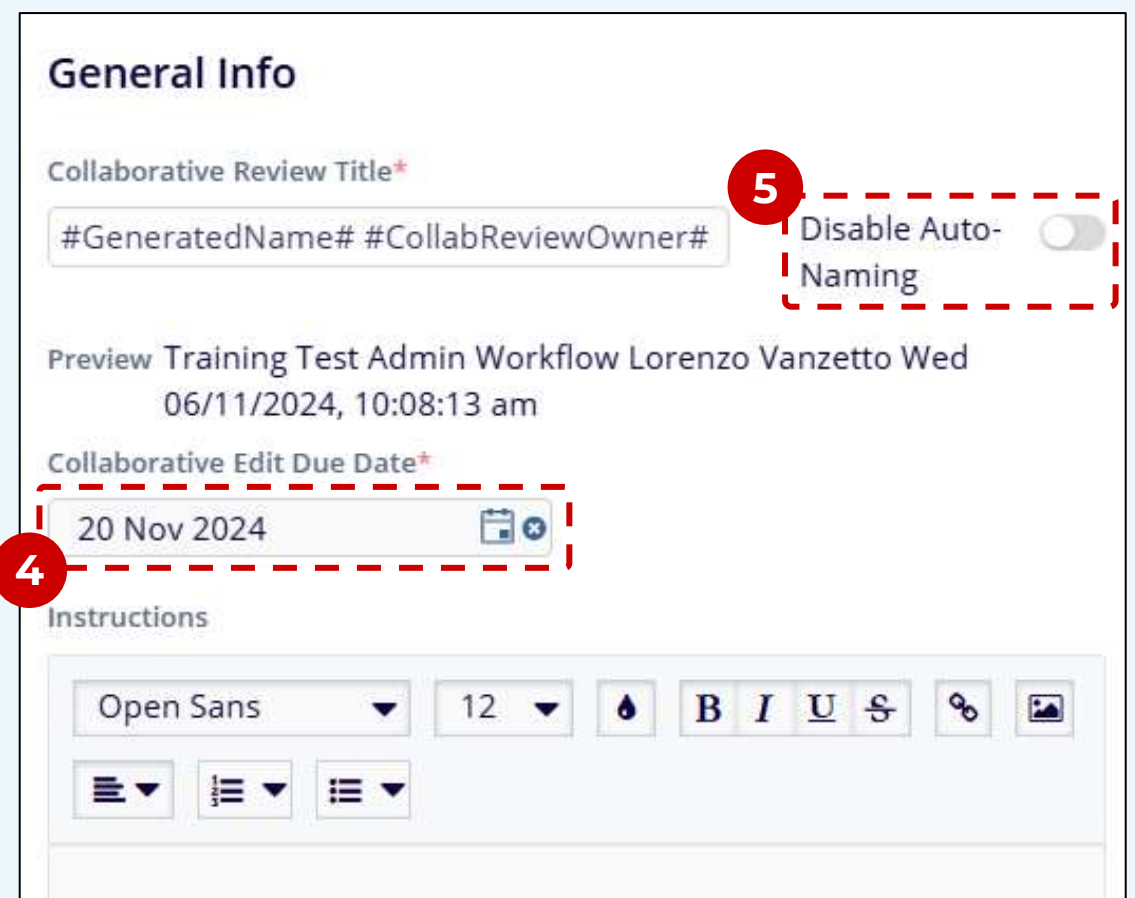
2 Open the **Document Action Menu** and expand the selection for Check Out.

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**.

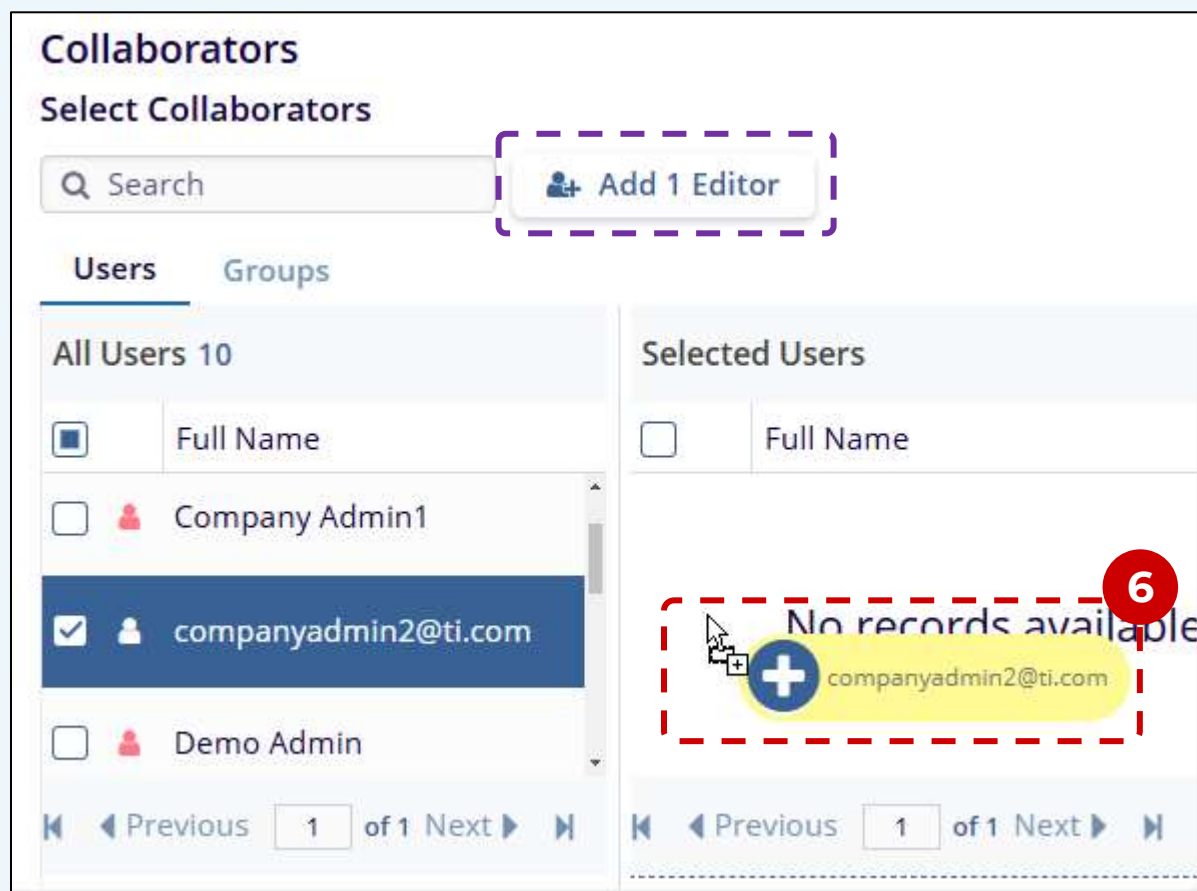


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6 In the next section, **select Collaborators** who will have access to this edit, by moving names from left to right.

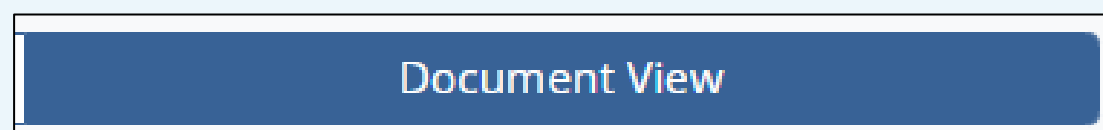
There is a helpful button to add all available Editors in one click.



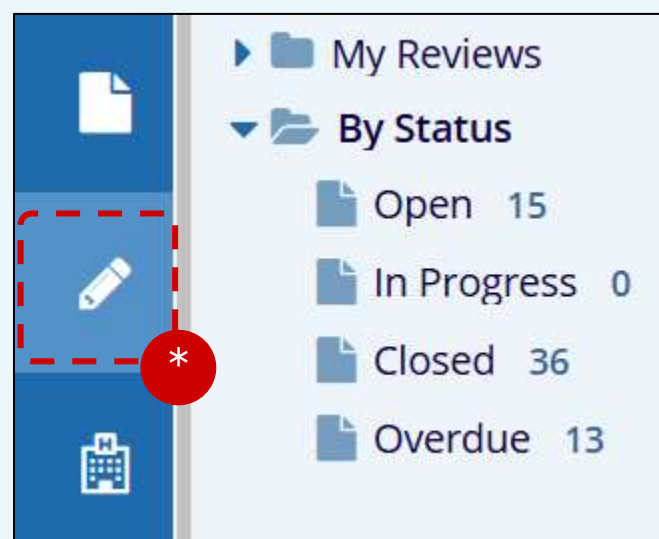
7 Click **Check Out** to start the edit.



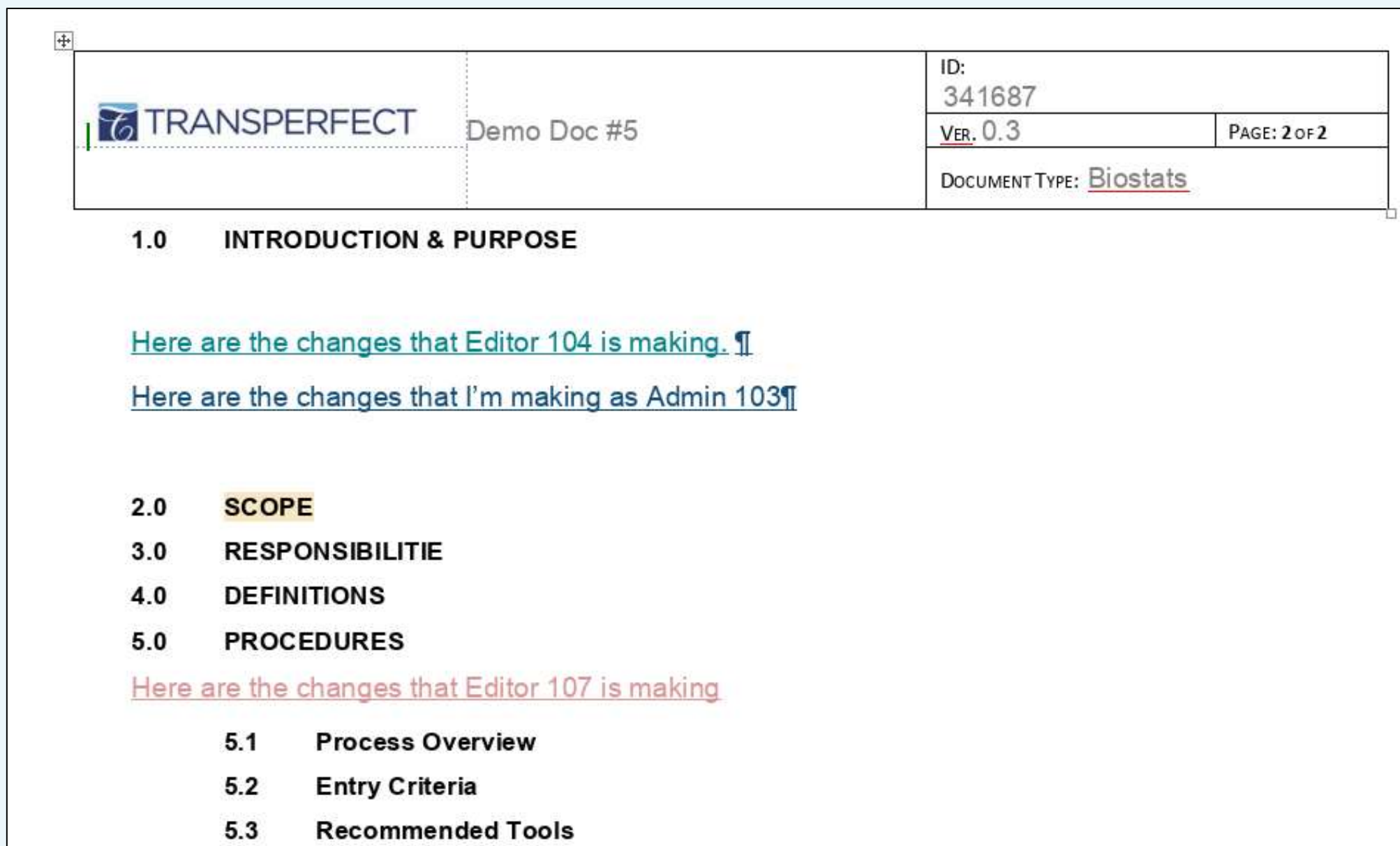
8 Enter the **Document View** to access the document in edit mode.



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

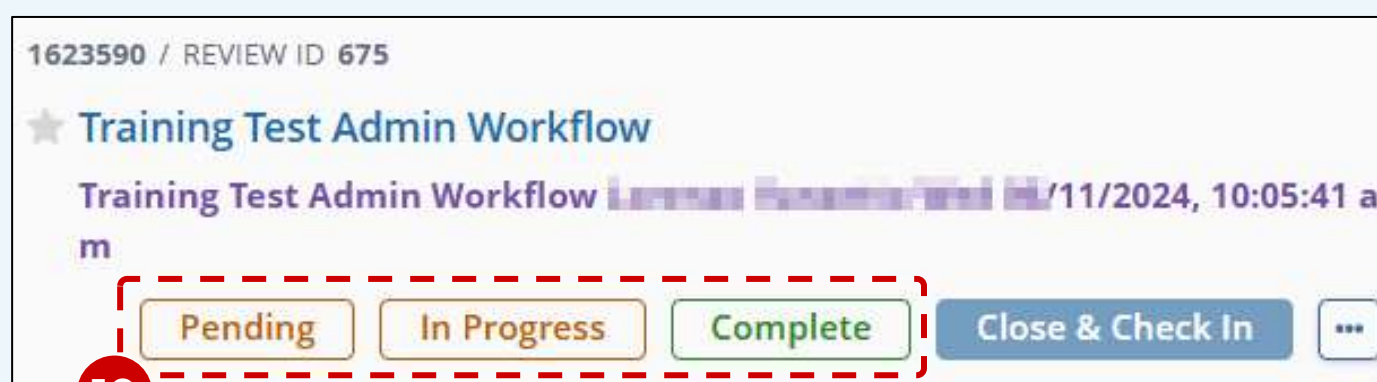


9 In the edit window, changes can be made in real-time by multiple users. Here's an example of what that would look like, with each contributor marked in different ink.



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, there is a table of contents with the following sections: 1.0 INTRODUCTION & PURPOSE, 2.0 SCOPE, 3.0 RESPONSIBILITIE, 4.0 DEFINITIONS, and 5.0 PROCEDURES. Under section 1.0, there are two paragraphs of text. The first paragraph is highlighted in green and contains the text "Here are the changes that Editor 104 is making." The second paragraph is highlighted in blue and contains the text "Here are the changes that I'm making as Admin 103". Under section 5.0, there are three sub-sections: 5.1 Process Overview, 5.2 Entry Criteria, and 5.3 Recommended Tools. The sub-section 5.1 is highlighted in red and contains the text "Here are the changes that Editor 107 is making".

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, there is a header with the text "1623590 / REVIEW ID 675". Below the header, there is a star icon and the text "Training Test Admin Workflow". Underneath, there is a list of review items with the text "Training Test Admin Workflow" and 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".