SOLABS QM 10.5 DOCUMENT Section: Collaborative Review

Overview

A SharePoint integration option is available with SOLABS QM to allow for collaborative editing on <u>MS Word documents</u> during a document Review Cycle, for those clients who use Office 365. It also allows document coordinators to work on the same file while the document is in authoring. Use of this feature eliminates the need to save documents on users' desktops.

Clients must request that this feature be enabled if they would like to use it as it's a configuration option and is turned off by default.

Pre-requisites – Logging in to MS Office Word

In order to fully benefit from this feature, one will have to sign in to MS Word.
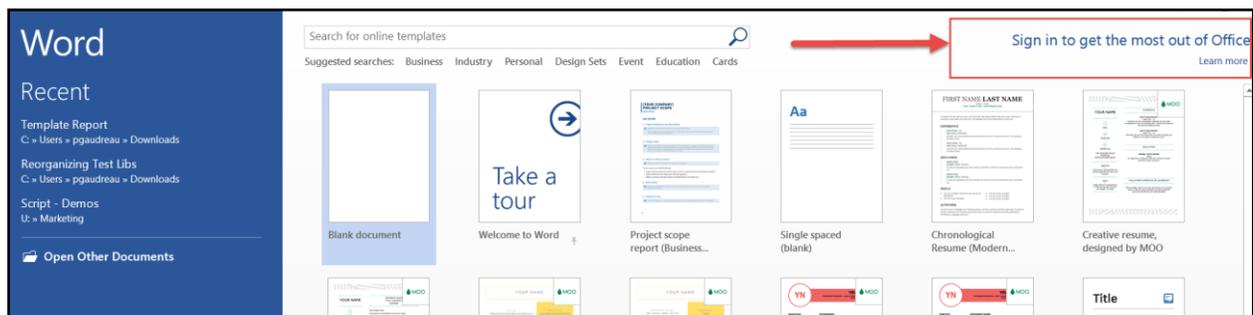
You will need a Microsoft Account to login, and use the full email address as the username e.g. s_user_0@solabs.com.

Select the **Keep me signed option** on the login window.


More information from Microsoft:
https://support.office.com/en-us/article/video-how-to-sign-in-to-office-a009917c-502f-4dfb-bce2-2f4e898a7d2c

Editing a document while in Authoring status

When creating a new document, a copy is made available into a **SharePoint Online** library and can be edited directly through the SOLABS QM interface. A preview screen is also available.

The **Edit** or **Edit Online** options are available. Both options require the end-user to be logged in with a Microsoft account, either in Word directly as covered in the **Pre-Requisites** of this document (**Edit** Option), or in the Web browser when using the **Edit Online** option. Document coordinators can make changes to the document several times before starting the review or approval cycle, while the document is in Authoring status. Please note that a watermark (**In Review**) is added to the MS Word document when sending it in review and also that the Tracked Changes feature is automatically turned on.

The file while name is automatically changed to the unique number of the document while in Authoring or In Review, this is the standard behavior.
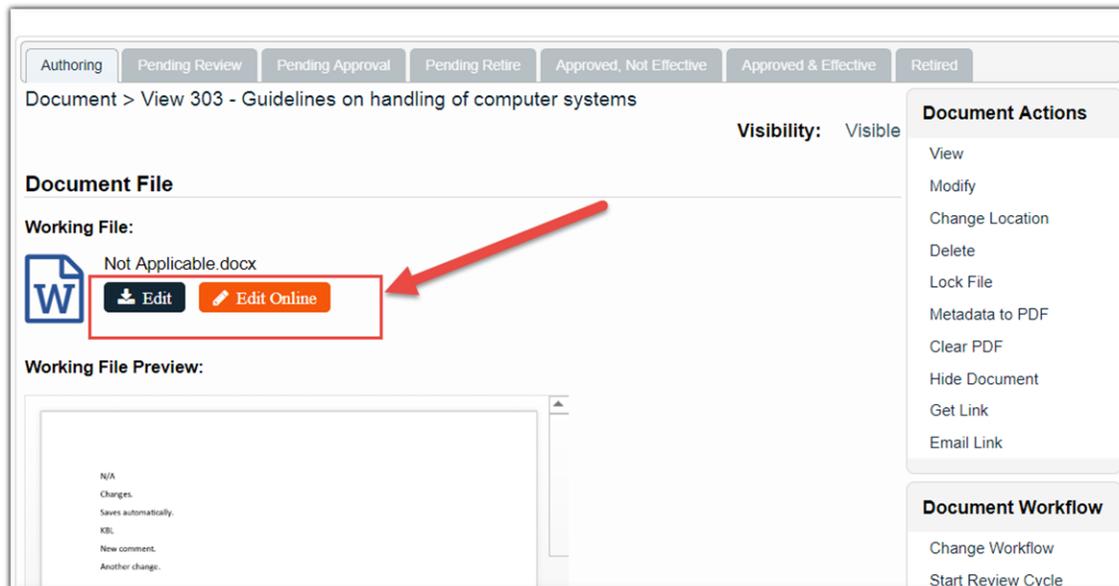

Attention:

When using the **Edit** option, sometimes the document will move out of the system and be downloaded on your desktop. This is visible with a number sign added in brackets after the name of the file.
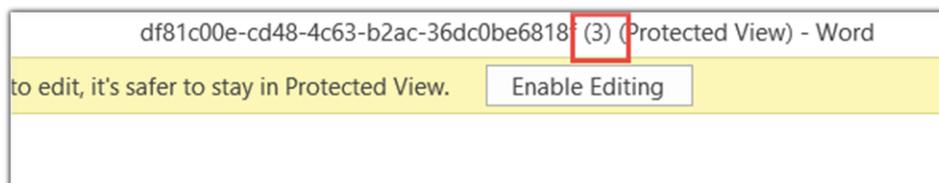
It is therefore recommended to use the **Edit Online** option first, and then from there select **Edit in Word** when looking at the document in the Browser. You can also make changes directly in the browser.

Document Review Cycle – Edit Online Option

When this feature is enabled, the **Document View** screen will include an **Edit Online** option. Use of this option opens the document for editing using the SharePoint Word Online feature.
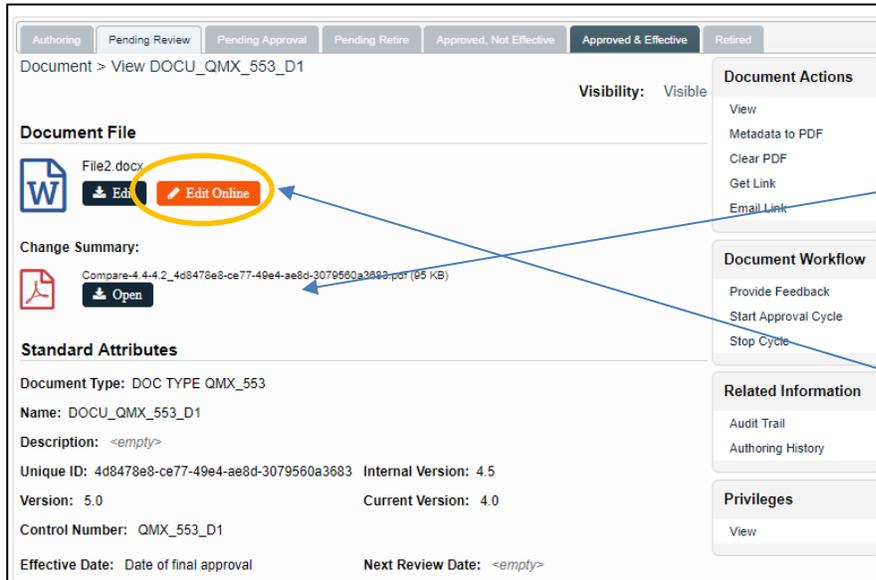
Click on the **View** option next to the Review task on your SOLABS QM Home Page.
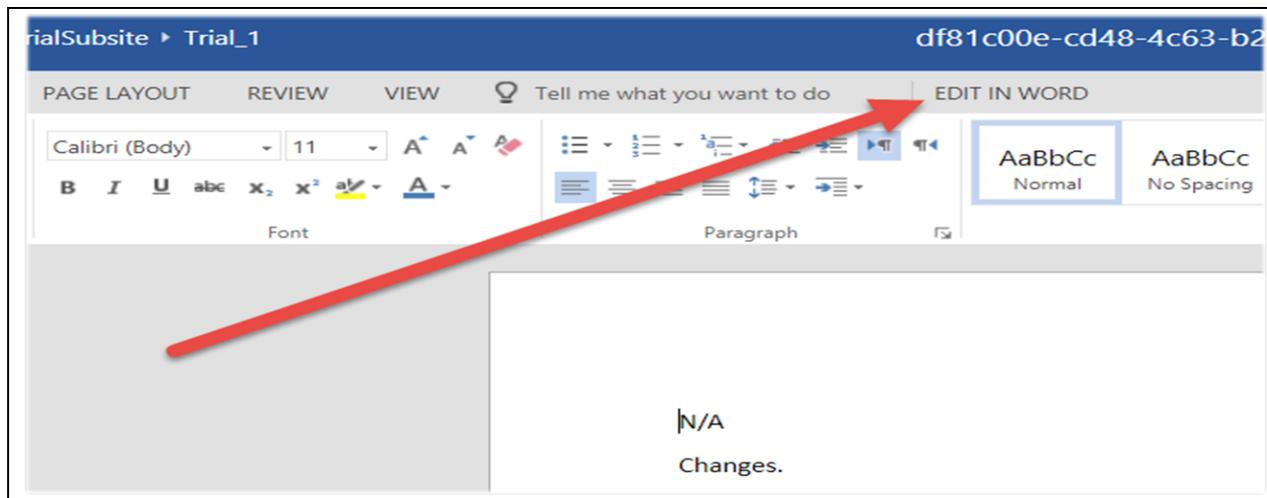
Click on the **Compare** file in the Change Summary section to see what changes the Author is proposing.

To make your edits, if needed, click on the **Edit Online** option. This will open the document in Word Online.

Optional: Editing in MS Word

After using the **Edit Online** option, you can select **EDIT IN WORD** to edit and save in MS Word.

Using Word Online for Collaborative Editing in SharePoint

When a User is editing a document using **Word Online**, they are able to see – in the top right-hand corner of their screen - whether anyone else has the document open at the same time.   They will also be able to see any edits that other person is making to the document.

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Martha Bailey is also editing

After completing and saving any edits, choose **Document Workflow > Provide Feedback** from the right-hand menu of the Document View screen.   In the **Review Cycle** section, select your name next to **Awaiting Review**.

Decision:
○ OK, no change
● Reviewed, see comments
○ Cycle stopped with comments

Comments:

File with comments:
● N/A
○ No file selected   Choose File

In the **Decision** section, choose **Reviewed, see comments**. You can make an optional comment in the **Comment** field to describe your change but don't need to upload a file because you will have made the edits using Word Online so they will already be available in SOLABS QM.

Viewing the Edited Document

After a collaborative review, the edits made by each reviewer are incorporated into the **Edited Document**. To view the actual edits as either the Author or the Document Coordinator, open the document in **Word** and use the **Track Changes** feature.

Edited Document:

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Word Track Changes view:

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