

HOW TO WORK WITH FILES IN TEAMS

(whilst preventing others from making changes to them)

For guidance on creating files and folders in Teams please use “How to create files and folders in Teams” topic <https://training.westerncare.ie/teams/>

You can work on files in collaboration with others online, the process is covered in “Collaborating on files” topic here: <https://training.westerncare.ie/office-365/>

If you wish to work on a file yourself and **prevent others from making changes to it**, you can use the “Check-out” feature in teams described below:

Check-out

In a multi-user environment where lots of people might want to edit a file at the same time, check out is a feature that ensures there is **only one current copy of each file**. Check Out temporarily **stops** others **editing** the document, usually while major changes are being made.

It may not be suited for those looking at easy real-time collaboration with other team members, but rather a process that might need a review document process with one person **‘taking control’** of the document.

In other words, Microsoft Teams allows users to **Check Out** a file so that it cannot be edited by anyone else.

WARNING: If you **check-out** a file but you forget to **save** it, once you check-in the file **your changes will not be saved!**

If you choose to discard the check out, even if you’re saved the file, changes won’t be saved back to the library. It is best practice to check in a checked-out file once the user has completed editing it, as Teams doesn’t have a means of **reminding** you to check in a document. **Check In** allows other team members to edit the content as well as allowing them to see your changes.

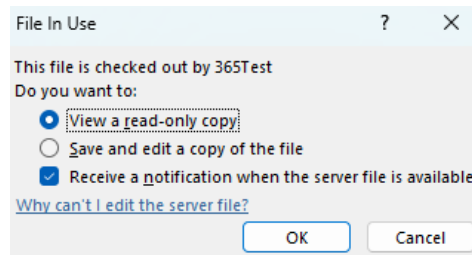
Below are the steps to take if you wish to use this feature:

The screenshot illustrates the process of checking out a file in Microsoft Teams. It is divided into three numbered steps:

- 1** Select the file you want to check-out or click on More Options (3 dots next to the name)
- 2** Choose More > Check-out
- 3** a. you will see a red mark next to the name, and b. pop-out notification that the file has been checked-out

The image shows a file list with 'events.docx' selected. A context menu is open over it, with 'More' and 'Check out' highlighted. A notification bubble in the top right corner says 'Checked out 1 item Done' with a red '3b' next to it. A red '3a' is also visible next to the file name in the list.

If anyone tries to check-out or access the file while it's in a "checked-out" state they will see this notification:



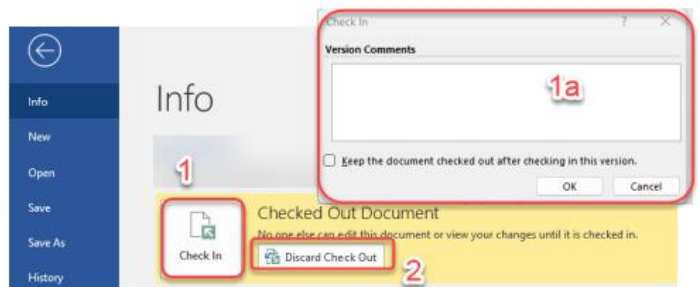
Once you check-out a file, you can work on it in either online or desktop version of the App (Word/Excel/Powerpoint) and when you finish, you will need to SAVE changes and then check it IN. You can do it either in a desktop app or directly in Teams (there is no option to do it in an online version of the apps).

Check-in

You can check a file in either using a desktop app or in Teams:

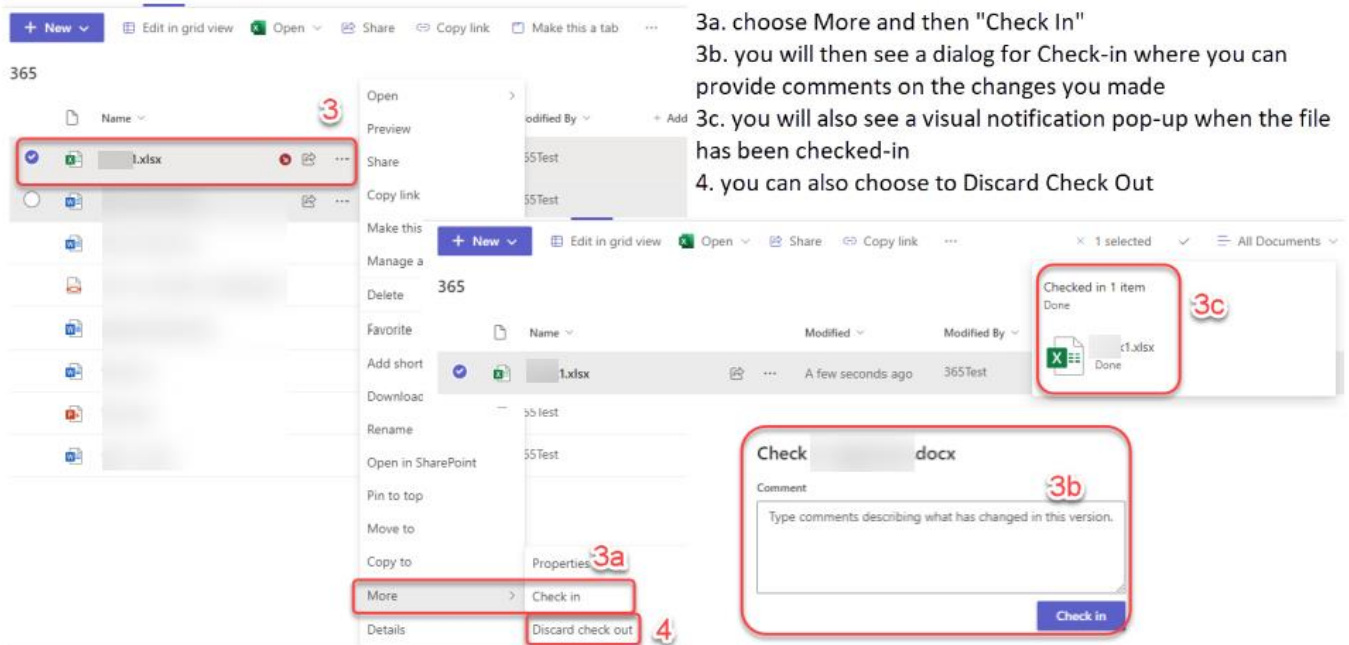
- 2 To check a file in from a desktop version of an app you need to go to File > Info and
 1. click on "Check In"
 - 1a. you will then see a dialog for Check-in where you can provide version comments on the changes you made
 2. you can also choose to Discard Check Out, however that closes the file and re-opens it as a read-only.

For best results it is recommended to do it in Teams



To check a file in from a Teams:

- 3. right-click or select the file and under more options (3 dots) select
 - 3a. choose More and then "Check In"
 - 3b. you will then see a dialog for Check-in where you can provide comments on the changes you made
 - 3c. you will also see a visual notification pop-up when the file has been checked-in
- 4. you can also choose to Discard Check Out



You must make sure that the document is saved prior to checking-in!