

COLLABORATION IN 365

The process is straight-forward:

1. **Grant edit access** to the file you wish to collaborate on
2. **Inform** collaborators (send email or link, notification by email from 365 or teams, or any other way)
3. **Start collaborating!**

Please note, that if the **"Can edit"** or **"Can review"** access was not appropriately set by the Owner/Author of the file, other people will not be able to collaborate on it or share it with others, only view/download depending on the level of access set on the file for them. They can only re-share the file and add collaborators to it with Edit access. Review access will only give them ability to suggest but NOT accept changes. So, the 1st step to take is to **Grant access**:

I. From the file itself -

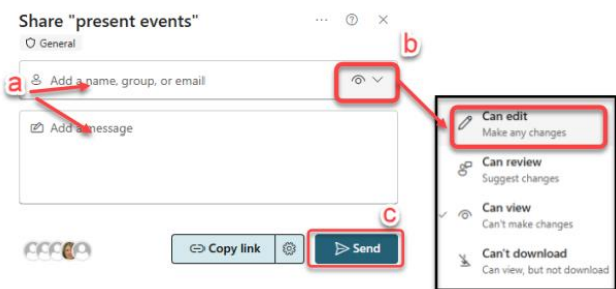
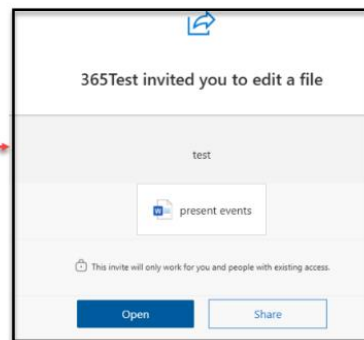


Click on "Share" in the upper right-hand corner and then click on Share.

1. In the Share window do one of the following:

- a) type names of people you want to share with, with an optional message below
- b) change access to "Can edit"
- c) click on "Send"

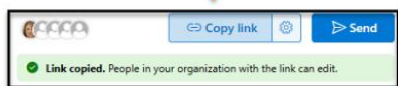
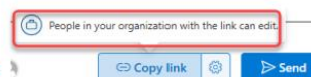
The recipient will see a message like this



If you do not wish to send a message, you can either copy a link, which you can then paste into a chat or anywhere else, or send a link in an outlook mail. The steps for sending a link are the same as above:

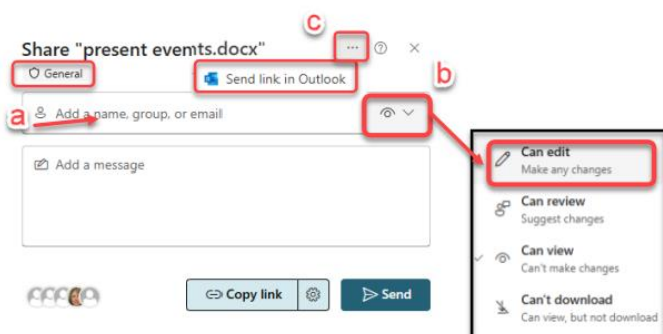
- a) type names of people you want to share with
- b) change access to "Can edit"
- c) here, instead of clicking "Send", click on "Copy link" and then paste it into an email/chat/etc. You will see a confirmation of the access level set, at the bottom.
- d) you can then close the dialog by clicking on the X

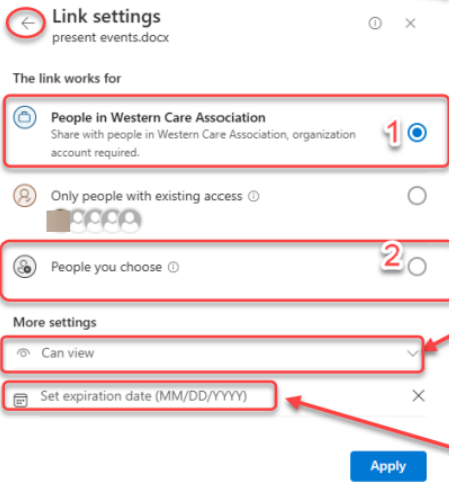
Before sending a link, you can check the level of access set if you hover over the "Copy link" button



Additionally, Office 365 can create an Outlook message for you with a link. The steps for sending a link are the same as above:

- a) type names of people you want to share with (this is optional)
- b) change access to "Can edit"
- c) here, instead of clicking "Send", click on the 3 dots (...) and click on "Send link in Outlook". A new Outlook email will open in a separate window with a link in the body of the email (and the recipient's address if you typed it in step a))





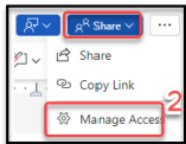
If you are sending a link, and you wish to set either an organisation access level (by default everyone in WCA can "View" any file), click on Link settings (cog icon next to "Copy link" button), it is advisable to limit access to just the people you're sharing this file with by choosing one of these options:

- 1) People in Western Care Association
- 2) "People you choose" (this way you can also share the file with selected people from outside WCA) for this option you can type names/groups (if they are already present in your address book, or email addresses, this is done in step a))

You can also set the access level ("Can edit") as shown in above screenshots or by clicking on the drop-down arrow here.

Additionally you can also set an Expiration date below access level and then click on Copy Link and send/paste it to the target audience

Click on "Apply" when finished and then on "Copy Link" button.



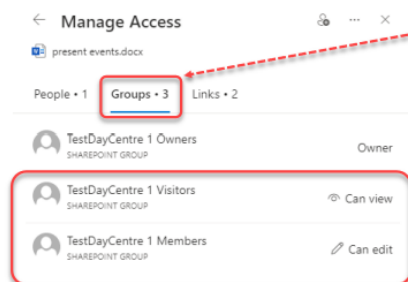
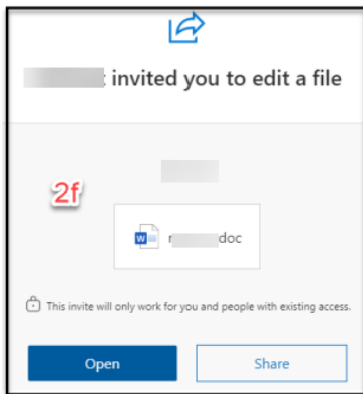
2. Additionally, you can also grant access (as well as check if anyone already has it, and or remove access), by either going to Share > Manage Access inside a file, or by clicking on the profile bubbles in the Share dialog. In "Manage access" dialog you can set access for:

- a) People
- b) Groups
- c) Links



2a) To add more people click on the person icon here. In People tab you can change the access level for those you have already selected in the address field or those that already have access to this file.

When using option 2a you will then see the following window -2b, where you can add peoples' names and/or email addresses. Then you will need to set the appropriate access level - 2c, and either check the option "Notify people" (if you do, you can additionally add a message below the address field) or just click on "Grant access". If you checked the Notify option the confirmation pop-up will say (2e) "Access granted and notified" otherwise just "Access granted". When you close the pop-up you will have to repeat the steps if you want to add more people. The added person will receive this message if you chose the Notify option (2f)



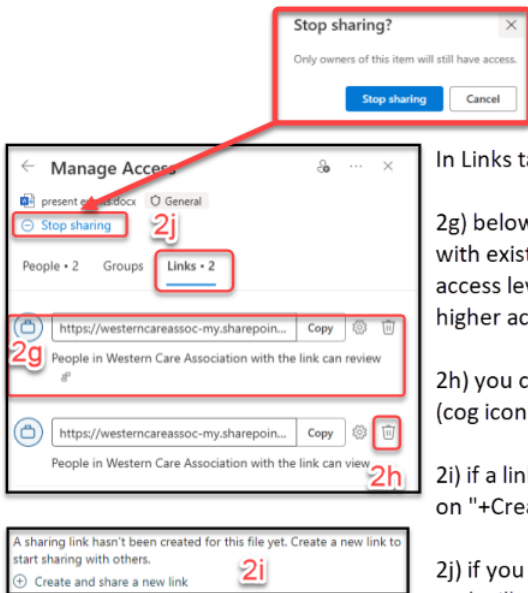
If the file is being shared from Teams, the channel it's being shared from will automatically be added with 3 default access levels under Groups tab: View access for Visitors and Edit access for Members, and the Owner of this file is (the channel it is located in).

If the file is not in Teams /or it is being shared by a person from their 365 online and has not been shared with a group before, below in Groups tab you will see the following:



If you would like to share the file with a group, you can add a group by clicking on "+Share with a group" and typing its name in the address field (option a)





In Links tab you can see if a link to the file has been shared before (the tab will show the count)

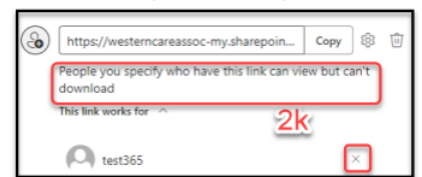
2g) below the link instance you can tell what access has been set and for what category (WCA, People with existing access or People you choose). If the link has been shared with the same Cohort but the access level is different (eg. one link was given an Edit access, and the other View access, then the higher access will apply)

2h) you can delete the link instance by clicking on the bin icon (you can also do this from the settings (cog icon next to the bin icon)

2i) if a link to the file has not yet been shared with anyone you will see this message, here by clicking on "+Create and share a new link" you can set sharing options

2j) if you want to remove all access to the file/stop sharin, you can click on the "Stop sharing" link and will see a prompt informing you that only owners will have access when you confirm you wish to stop sharing by pressing the button "Stop sharing"

2k) if a link was shared with a category "People you choose" then you will also have an option in settings (cog icon) to remove individual(s) from accessing the link by clicking on the X next to their name



II. By sharing from anywhere in 365 -

You can share files with anyone in the organisation and beyond by using the Share option. It is available in:

- Home page
- OneDrive
- Teams
- Word/Excel/PowerPoint

There are 2 ways to share a file.

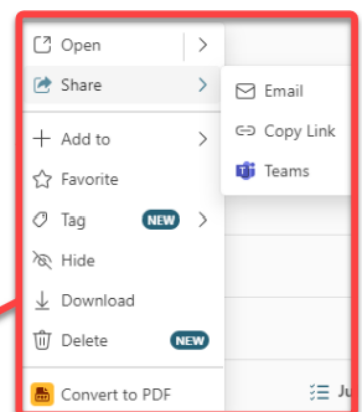
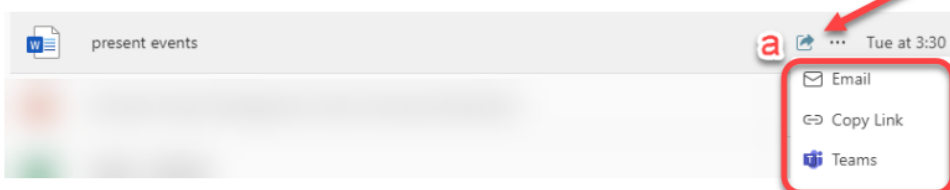
1. You can share **without even opening** a file, by right-clicking on it and choosing share (or 3 dots ... (more options) then Share)

Anywhere where you can share a file you can either:

a) click on the share icon and pick from one of the options (Email/Copy Link/Teams)

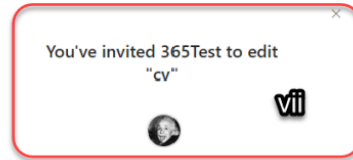
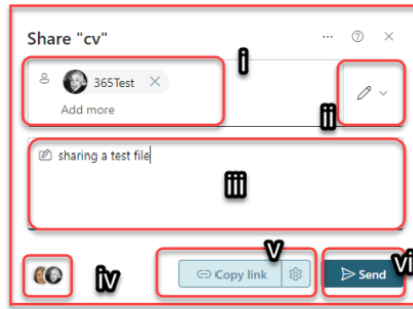
or

b) click on the 3 dots then click on Share and then pick from one of the options

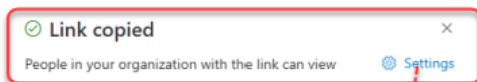


If you choose "Share" and then "Email" option you will see the window like this ->

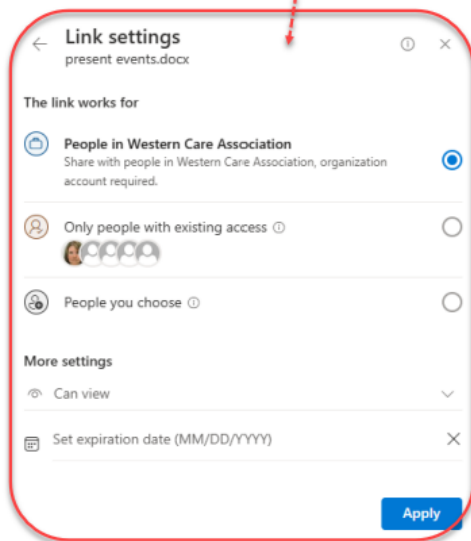
- i) type the name of the person you want to share the file with
- ii) select the access level (Edit / View / View but not download / Review (suggest changes))
- iii) type a message (optional), you can also format it on the
- iv) here you can see who else has access
- v) if you don't want to send an email you can just copy a link, "cog" icon next to it is where you can see the access levels details
- vi) press send
- vii) you will see a confirmation window like this



viii) the person you shared the file with will receive a message like this, they can open the file by clicking on its name or Open button. If they want to share it with someone else, they can click on Share button and will see the same "Share" window as described here

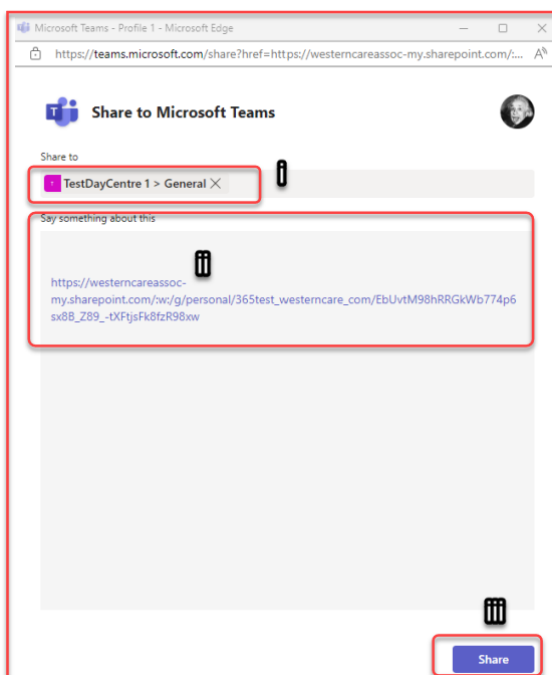


If you choose "Share", click on "Copy link" option and you will see a pop-up "Link copied"



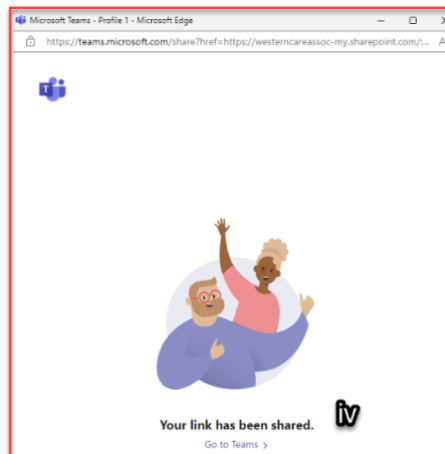
If you want to change the access level, click on "Settings" and you can change access level under "More settings"

You can also set an expiration of access date below and then click on Apply.



If you choose Share and then the Teams option, you can share directly into a Teams channel

i) if you click inside the field it will show you recent locations in the drop-down but if you don't see the channel you want to share to, then start typing the channel name and select it when you get the right one



ii) you can type an optional message above the link if you wish to

iii) click on "Share" button

iv) you will see a confirmation window like this one, if you want to check how it looks click on "Go to Teams >" link at the bottom

Step 2 – is to **inform** collaborators, you can do it when you are setting access inside the file itself or by choosing any Share option from any area of 365 where it is available, by using one of the above described methods.

Step 3 – when the chosen collaborators receive an email/link or notification and access the file, they can start making changes, accepting or rejecting them and adding or removing comments, all this is covered below:

Main options to be checked for successful collaboration:

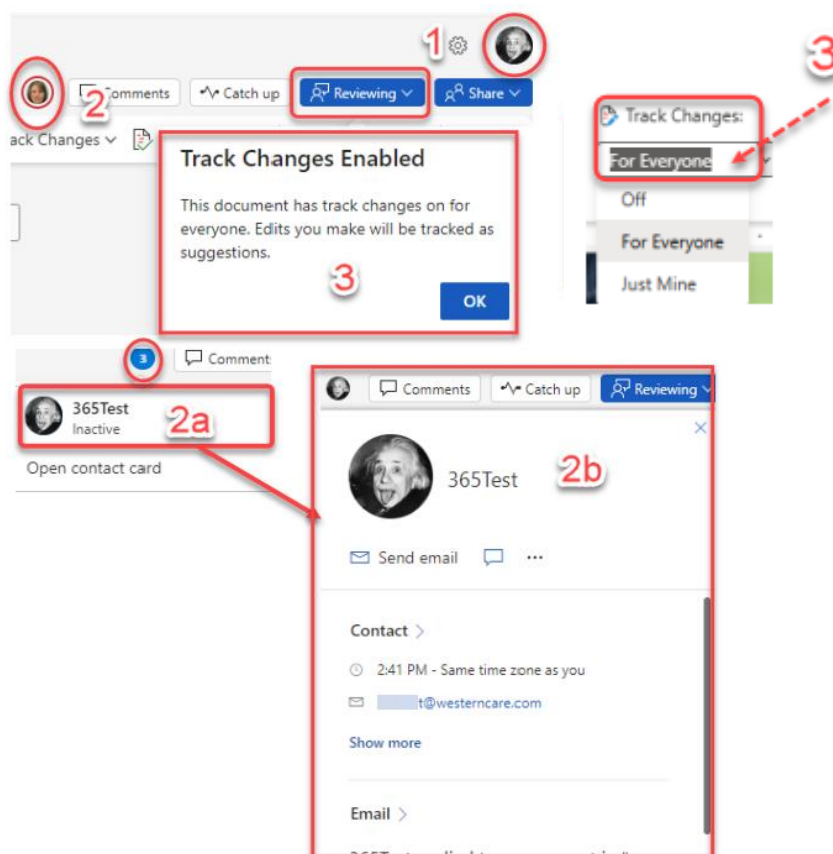
Tracking

First thing you and other collaborators will see when opening the file is who is also currently accessing it right this moment.

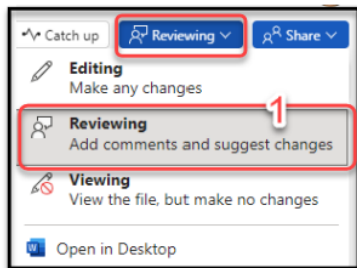
1. Your profile bubble will show in the top right-hand corner (provided you are logged in)

2. Your collaborators' profile bubbles will show next to "Comments" option and circled in different colours (if they don't have a picture the bubbles will only show their initials), and you can "hover" over it to see the full name and link to their contact card (2a), by clicking on the name you will see the contact card (2b) with all the details

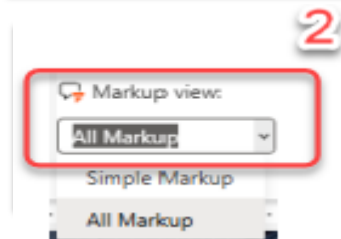
3. If Tracking changes are enabled you will see a notification about it. It is strongly advised to enable tracking changed "**For everyone**" by clicking on the drop-down arrow next to "Tracking changes" button



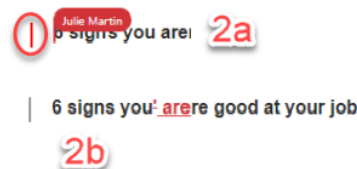
Reviewing Mode, Markup and accepting/rejecting changes



1. You should ensure you are in the right "Reviewing" mode (1) by clicking on the blue "Reviewing" button drop-down arrow and choosing "Reviewing" (to use collaboration mode) OR "Editing" (if you wish to make any edits without collaborating, note Edit access should have been given for this to function). You can toggle between them at any time if Edit access was given to the person working on the file. If "Can review" only access was given the Editing option will be greyed out and that person will only be able to suggest changes, but not accept them.

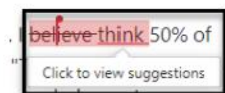


2. "Markup view" button. Mark-up of changes can be displayed in 2 ways:
 - Markup in margin (Simple markup)
 - Markup on page (All markup)
 the difference is shown here:



a) if you are looking at your colleague's changes and "markup in margin" is selected you will only see their coloured cursor with a tiny bubble on the page next to a change, and if you hover over it you will see the name of the person who is suggesting the change. Note: by toggling the coloured bar next to the sentence where changes are made you can "reveal" them
 b) if you are the one making changes in the file you will see them in text in the colour assigned to you, if "markup on page" option is selected others will also see them on the page as they are added

workforce comes to do a good day. ~~Too many~~ A lot of employees



3. Accepting / rejecting changes LIVE

To be able to accept/reject changes you must remember that Tracking option "For everyone" needs to be set for this to function properly. When a change is made, you can "hover" over it to see who made it and click on their name and/or click into the text and click on "Click to view suggestions"

ings about people. I believe think



A pop-up window will display below the changed text showing you who suggested the change, what it was, when and option to Accept or Reject suggested change (check-mark/cross)

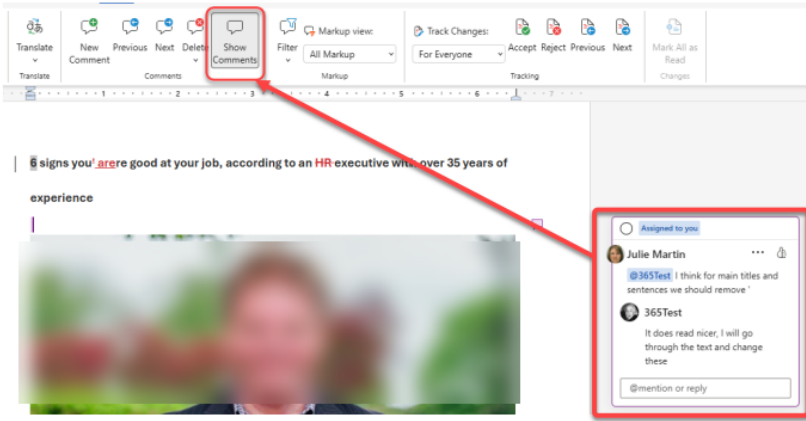
Turn off Track Changes?

Editing this document will turn off Track Changes for everyone. Do you want to continue?



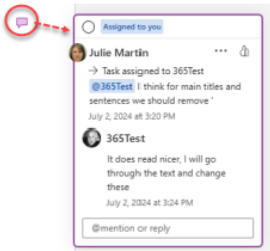
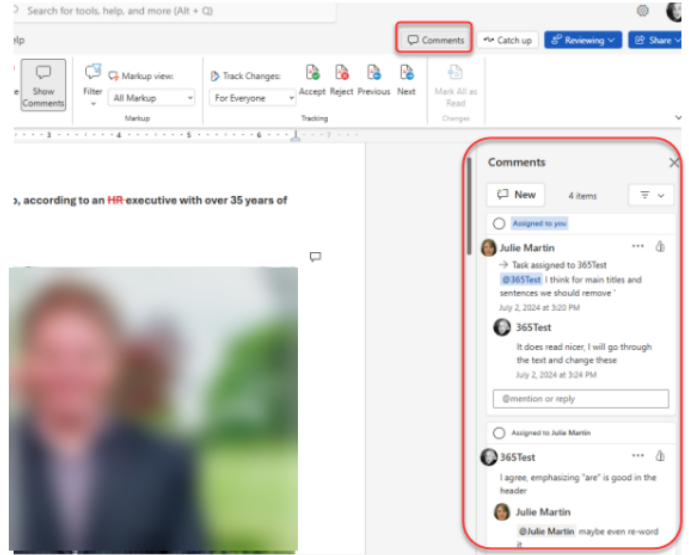
If you switch between Reviewing and Editing modes you will be asked to turn off tracking.

Comments

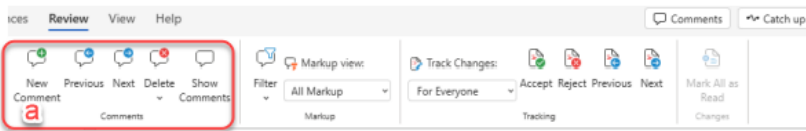


Working with comments

1. Click on "Show comments" button, it will toggle displaying Comments on the right of the body of the document on/off.
2. Another way to display comments is to turn on/off the "Comments" pane on the top, this opens the pane where you can see all the comments in the document instead of scrolling through the document or opening comments individually. Here you can filter them by "@mentions me" (only the ones where you're mentioned), Active or Resolved.

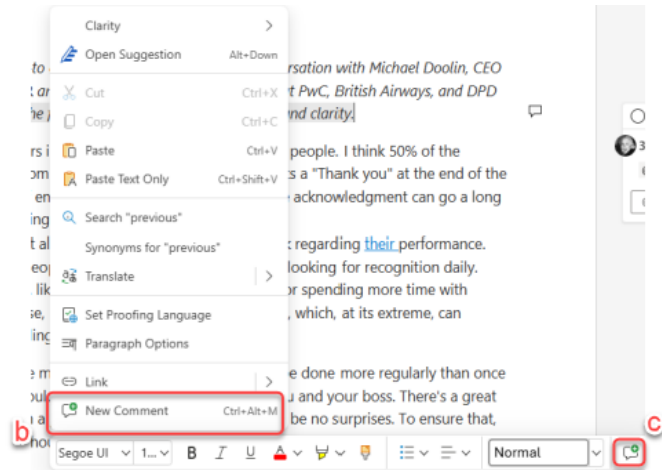


3. If the "Comments" pane is turned off, and or "Show comments" option is not ON, you can still see individual comments and open them by clicking on the coloured "Comment" icon in the text of the document.

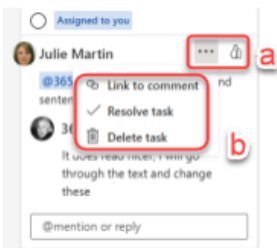


To add a new comment, you can either a) click on "New Comment" button in Comments section of the Review tab, or highlight the word / put a cursor where you want to insert one and right-click, this opens 2 menus to choose from (both actions are the same), choose either b) "New Comment" Ctrl+Alt+M from the pop-up menu, or click on c) new comment icon in the line menu.

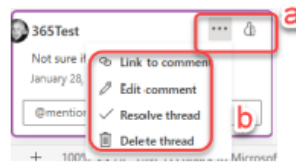
In the Comments section of the Review tab you can also navigate between Previous/Next comments and delete the selected ones.



Actions for tasks and comments

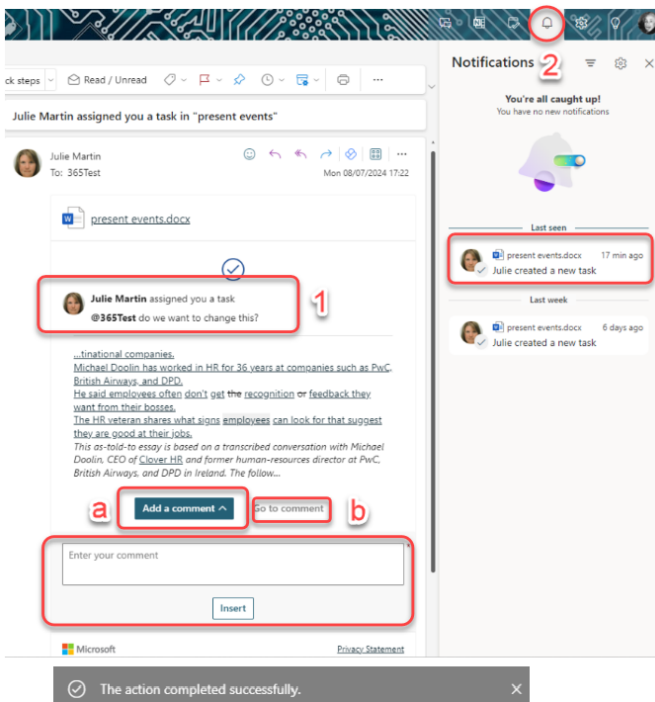


- Actions for tasks are:
- a) Like
 - b) in More options (3 dots ...)
 - * Link to comment
 - * Resolve task
 - * Delete task



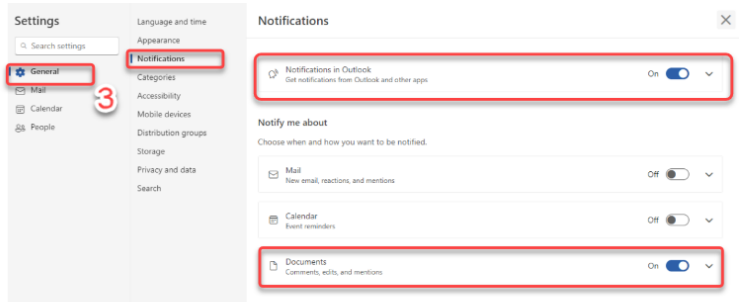
- Actions for **Comments** are:
- a) Like
 - b) in More options (3 dots ...)
 - * Link to comment
 - * Edit comment
 - * Resolve thread

Notifications

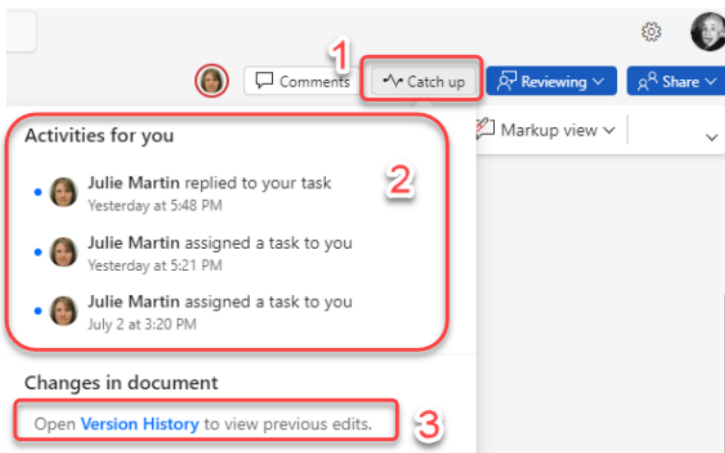


When someone assigns a task to you in a document, you will receive a notification by email (1) and in your notification pane (2) (only if your notification options are turned on in Outlook settings under General/Notifications - (3))

In the email you have 2 options to choose from:
a) click on "Add a comment" into the message and click Insert (you will see a message "The action completed successfully" at the bottom)
b) click on "Go to comment" and the file will open in the exact location of the comment

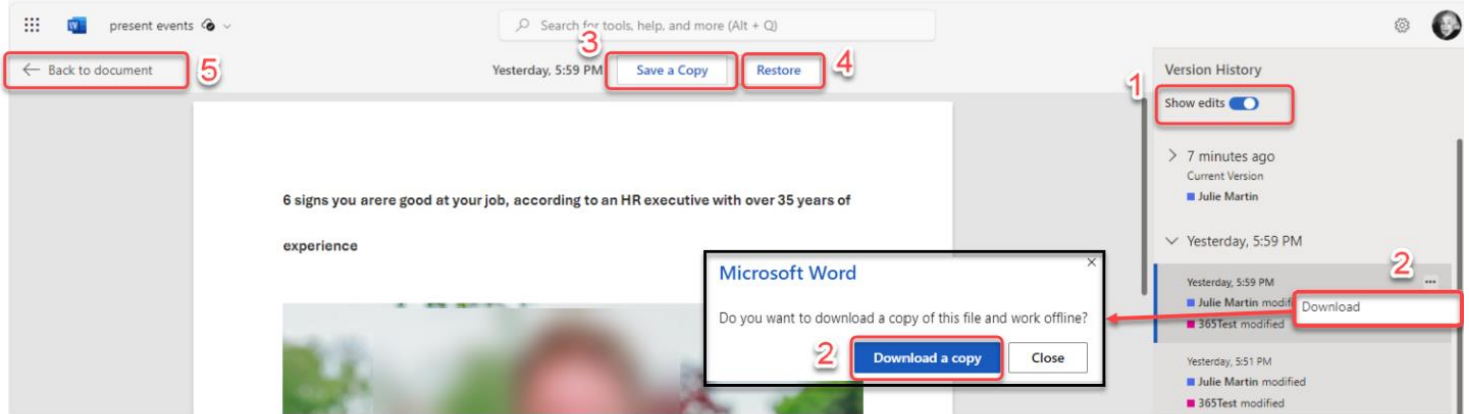


Versions of the document

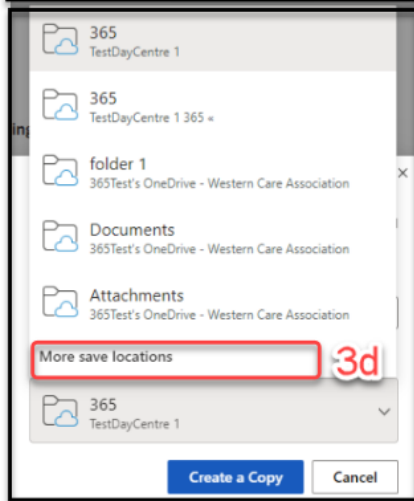
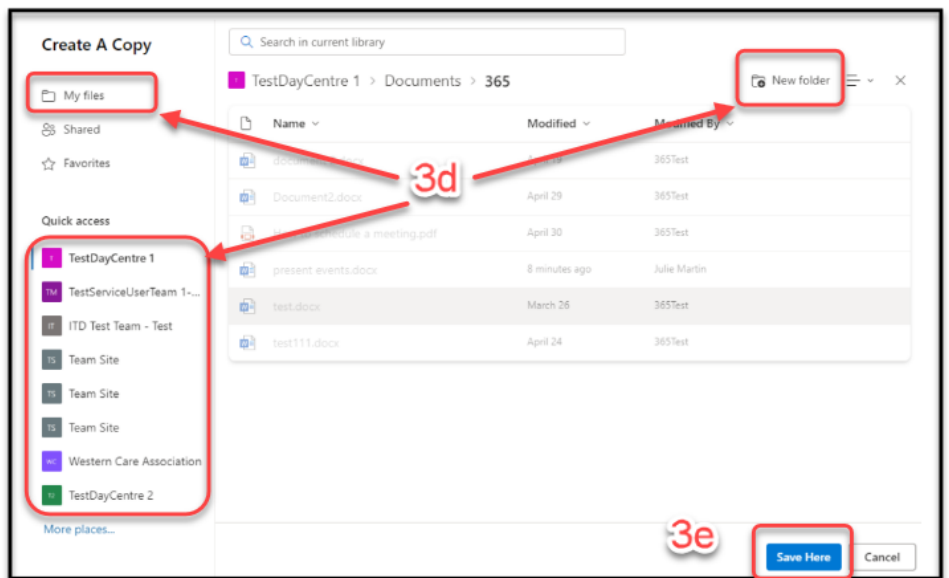
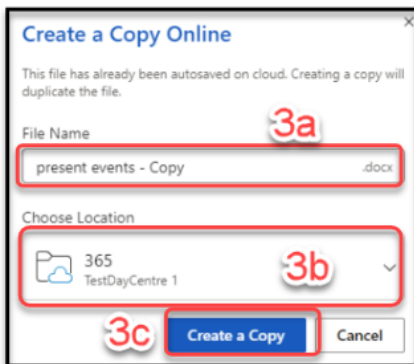


Catch up and Version History

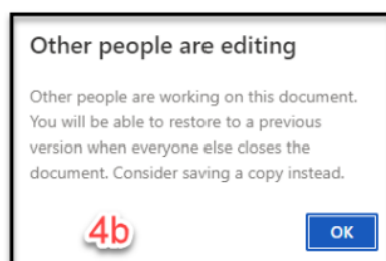
If you would like to see all the recent changes, tasks and actions you can click on "Catch up" button (1) and it will display all the latest activities (for you) (2) and you can also see "Version History" (3) where you can perform some actions with the document such as reverting to a previous version, downloading a copy of a particular version, saving a copy or restoring the file to a particular point/state



Ensure you have the "Show edits" option on (1) to see the edits. Unfortunately, you cannot see the content of the changes, only the timestamps, but you can track these inside the document by looking at the comments and actions in it and then match them to the list in Version History. Here from the list you can download a copy (2) from the version you need to work on it offline by clicking on the ... (3 dots) next to the date/time stamp and choosing "Download" and then clicking on the "Download a copy" button, use "Save a copy" button (3) to save another copy online, or use "Restore" button (4) to revert to the version from the date/time you need. Finally, you can go back to the document (5) by clicking on the "Back to document" arrow.

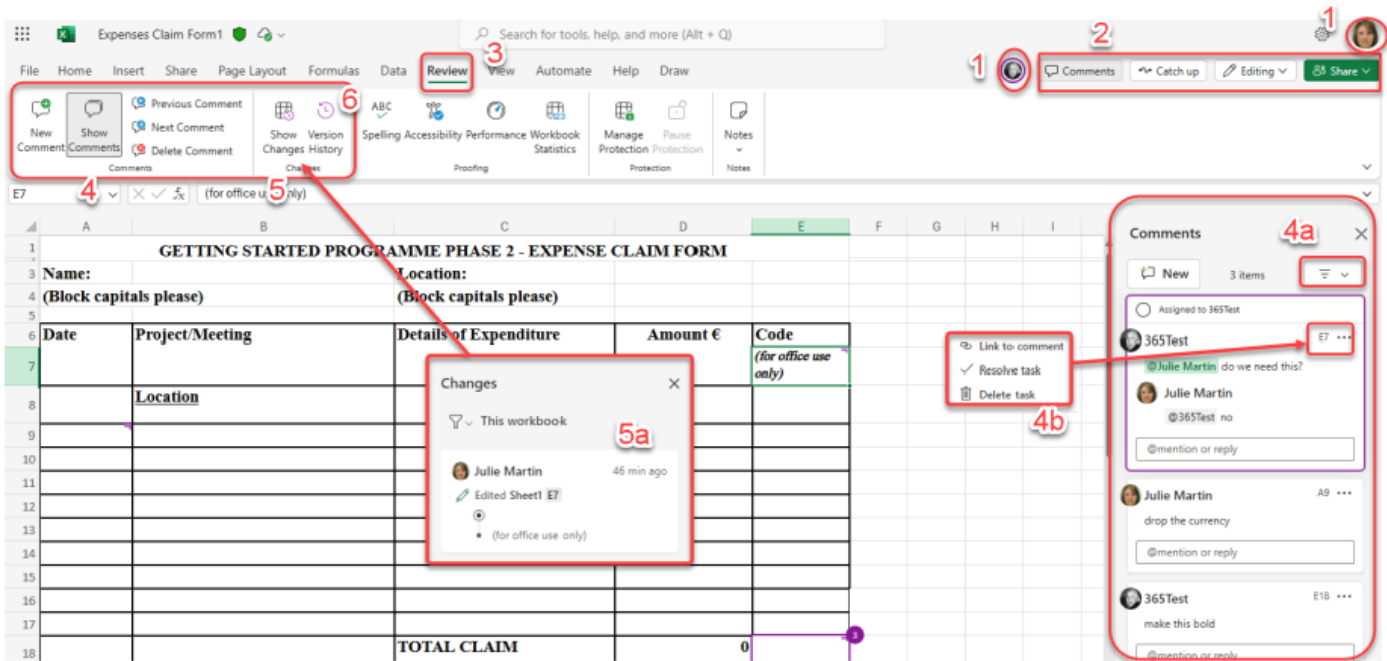


If you choose to "Save a copy" (option 3), you can change the file name/name of copy (3a), choose a default location (3b) and create a copy (3c), or choose a different location (3d), such as OneDrive (My files) or a Teams channel and/or create a new folder in one of those locations, before clicking on "Save here" (3e)

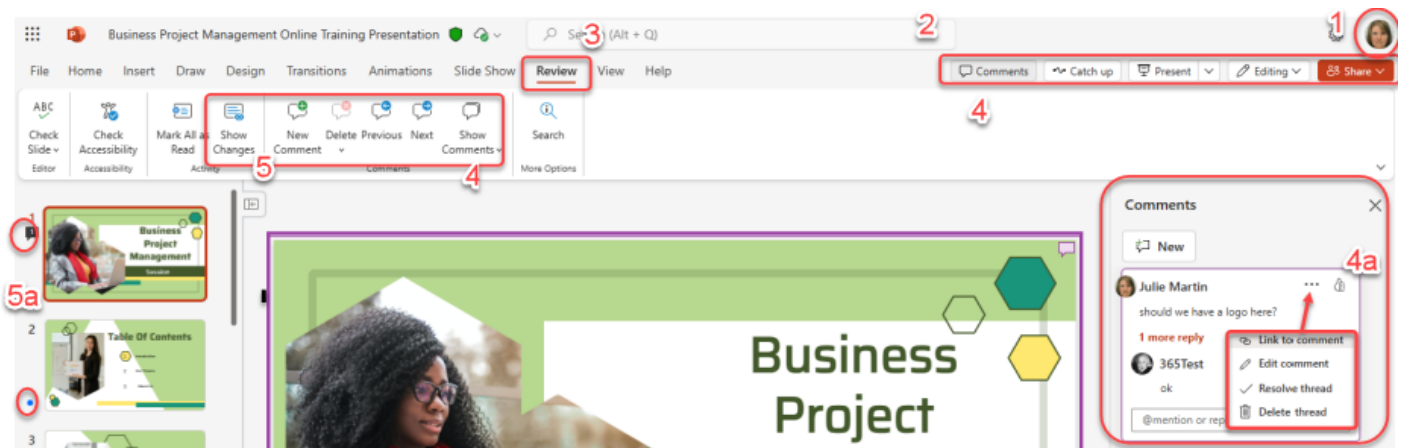


If you choose to "Restore" the file to a particular version/time/date (option 4), you will see this pop-up (4a), unless there are other collaborators in process of editing - then you will see this message (4b) and will not be able to restore the file unless everyone else has closed the document (remember to check for profile bubbles on the top). Once all have closed the document and you are able to restore it, it will open to the version you chose.

Excel and Powerpoint in 365 do not have a Review option/mode so collaborators can only add/remove comments in them.



1. You can see your and other collaborators' profile bubbles showing when someone else is currently working on the file
2. You can toggle "Comments" pane on/off, check "Catch up" to see latest activities and version history, switch between Editing and Viewing (there is **NO Reviewing mode** in Excel), and "Share" file with others provided you have been given "Can edit" access, if you are not the owner
3. In "Review" tab you can see the other collaboration options
4. By clicking on "Show Comments" here on on the top right-hand (2) you can open the Comments pane and here you can:
 - 4a filter comments
 - 4b click on ... (3 dots) for more options and choose to: Link to comment/Resolve task/Delete task
5. "Show changes" will open a Changes pane where you can see the changes made (5a)
6. Go to Version History, where you can Download a copy, Save a copy or Restore file to a particular version



1. You can see your and other collaborators' profile bubbles showing when someone else is currently working on the file
2. You can toggle "Comments" pane on/off, check "Catch up" to see latest activities and version history, switch between Editing and Viewing (there is **NO Reviewing mode** in Powerpoint), and "Share" file with others provided you have been given "Can edit" access, if you are not the owner
3. In "Review" tab you can see the other collaboration options
4. By clicking on "Show Comments" you can open the Comments pane and here you can:
 - 4a click on ... (3 dots) for more options and - Link to comment/Edit comment/Resolve thread/Delete thread
5. "Show changes" displays little icons next to the slides where changes/coments were made (5a), it also shows blue dots on the left of the tile with a change, but clicking on it or the slide tile you will be able to see the change with a colour box around it, and the collaborator's bubble in right upper corner (the colour corresponds to the collaborator's assigned colour)

To get to the Version History, where you can Download a copy, Save a copy or Restore file to a particular version click on "Catch up" button (toolbar shown in # 2)