Process Exercises
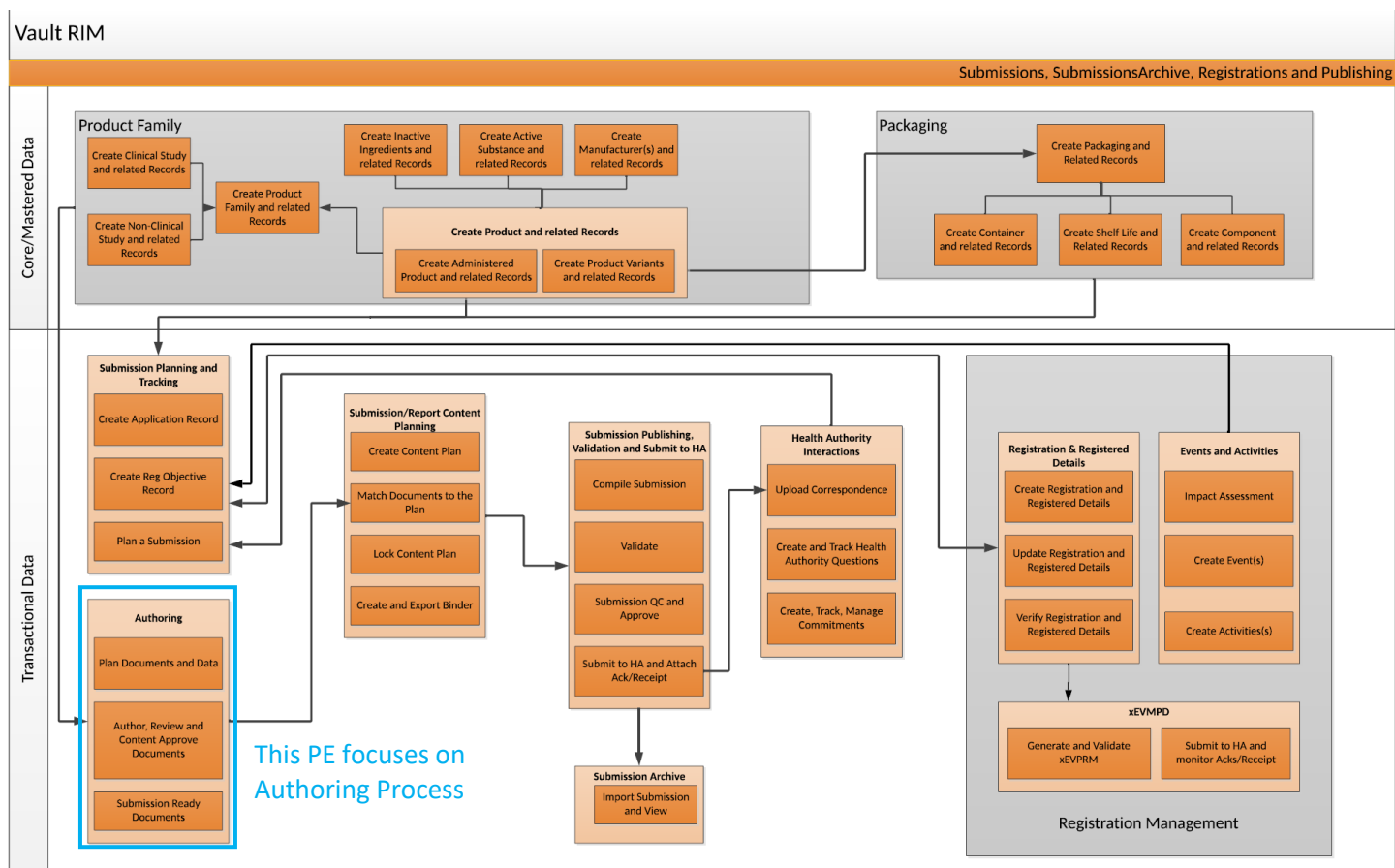
Collaborative Authoring

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INTRODUCTION

Welcome to the [Customer] Process Exercises! The exercises in this document will allow you to evaluate Collaborative Authoring functionality using the integration between Vault and Microsoft Office 365™.

These exercises represent simple cases and are not intended to exercise all possible scenarios. Users are encouraged to experiment and explore to ensure the system can support more realistic, real-world scenarios.

While conducting these exercises, consider any changes needed to meet your specific business requirements. You should capture those requirements and provide them to the Veeva Team as soon as possible for evaluation.

The **Vault Help Documentation** contains detailed information about Using Collaborative Authoring with Microsoft Office. Please consider using it as your first course of escalation. Vault's Help is very robust, so it's a good habit to develop. If the answer cannot be found, your Veeva project team members are more than happy to lend a hand.

COMMON TERMS

Term	Description
Vault Collaborative Authoring	Collaborative Authoring connects Vault to Office 365™ to allow multiple users to edit a document at the same time using the Office desktop software, Office Online™, or the Office mobile apps. Only users with edit and download permissions can edit a document with collaborative authoring. Collaborative authoring is available for Microsoft Word™ *.docx, Excel™ *.xlsx, and PowerPoint™ *.pptx documents.

PRE-REQUISITES

During this exercise, you will be uploading one or more MS Word documents into Vault. Make sure you have **.docx** documents ready to upload before beginning the exercise.

LOGIN INSTRUCTIONS

During the exercise, you will use the following test user accounts:

Note: Users must have Edit and Download permissions on a document to edit the document using collaborative authoring integration. This exercise requires **two users** to work together at the same time to complete the exercise.

Account	Username	Password
Document Owner	DocOwner@sb-<Company>.com	<password>
Author	Author@sb-<Company>.com	<password>

Launch your Browser and go to the following URL: https://login.veevavault.com/

COLLABORATIVE AUTHORING WITH MICROSOFT OFFICE

Collaborative Authoring with Microsoft Office is a cloud-to-cloud integration between Vault and Office 365 that provides an easy way to checkout and check-in documents to Office 365 where end users can utilize the powerful co-authoring capabilities provided by Microsoft Office. This feature provides full-featured Office co-authoring built into Vault Applications and processes. Collaborative authoring is available for **Microsoft Word™ *.docx**, **Excel™ *.xlsx**, and **PowerPoint™ *.pptx** documents.

Collaborative Authoring

This exercise requires two users to log into Vault on their own computers.

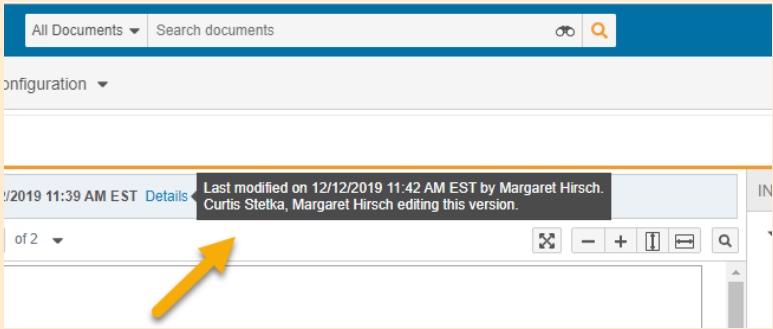| Step	Description	Notes
1.	Log in as the **Document Owner**.	
2.	In the top right of the screen, click the drop down arrow next to the **+Create** button and select **+Document.** Select **Upload** and press **Continue.** You can either drag and drop the file into the blue box or click the Choose button to locate the file on your computer.	
3.	Classify the document. You can **search** for the appropriate document classification by entering search terms in the Document Type Selector ("Choose document type"). You can browse the Document Type hierarchy by clicking on the binocular's icon in the Document Type Selector. Click **Next.**	
4.	Populate any required metadata fields. Name is pre-populated with the filename, but can be changed. Additional descriptive information can be entered in the Title field. Click **Save**. The document is created as a Draft, 0.1 version.	
5.	As the Owner of the document you should see an **Edit** box next to Draft at the top of the document.	The Edit box is only available for Collaborative Authoring – if you do not see an Edit box then either the document is not an Office 365 format e.g. docx, or Collaborative Authoring has not been enabled in your Vault. See this help article for configuration details.

Step	Description	Notes
6.	Initiate an Authoring Workflow by selecting **Start Authoring** from the Actions Menu. ⚙▾	While not required by the system for collaborative authoring, it is *strongly* recommended that you use the Authoring Workflow to provide a good business process to govern your collaborating.
7.	Select the **Author(s)** to be included in the Collaborative Authoring workflow, enter a task due date and instructions (optional). Click **Start** to initiate the workflow. The status of the document changes to **In Authoring.**	Note: More than one author can be included in a Collaborative Authoring workflow – this exercise is only using the **Document Owner** and one additional author.
8.	Click **Edit** to check out the document as the **Document Owner** and start the Collaborative Authoring session.	
9.	The first time you use collaborative authoring, a pop-up window will inform you that the document is being checked out to Microsoft Office.	
10.	A pop-up window will appear asking to open Word. Click **Open Word** to open the document in Microsoft Word. The document opens in MS Word for authoring.	If Track Changes were turned on prior to the workflow being initiated, then Track Changes will be enabled. If they were not turned on, the user can enable Track Changes now.
11.	Begin editing the document.	Autosave should be turned on – visible at the top of the document. AutoSave On ⬤ This will ensure any updates made to the document are automatically saved and viewable by other users working in the document.

Step	Description	Notes
12.	If **Track Changes** is not already enabled in the document, enable it now.	Note that collaborative authoring is more than just text; <u>any</u> change made in the doc will propagate to other editors – change tracking, layouts, styles, properties, etc. If, for example, one of the editors turns off Tracked Changes, the system will propagate that to the entire group of editors and turn it off for everyone. Therefore, it is important to make sure participants are aware of this and to agree ahead of time who will be responsible for the overall document.
13.	Navigate back to the Vault browser window – Hover over the pencil icon ✏ to see who has the document checked out including the date and time. You will also see boxes to edit the document, save the document to Vault or check-in the document, or cancel the checkout.	Note the pencil icon ✏ is also visible on the document in the Library.
14.	The first user should remain logged in on their computer. The second user should log in as the **Author**.	The steps remaining in this table will indicate if the step should be performed by the **Author**, **Document Owner**, or **Both**.
15.	Author: Navigate to the Home page and click on **My Tasks**. Select the **Update** task and click on the name of the document to view the document in Vault. Click **Edit** to edit the document in MS Word using Collaborative Authoring. Click **Open Microsoft Word.**	

Step	Description	Notes
16.	Both Author and Document Owner: MS Word will display an icon in the menu bar of the document, indicating the identity of other user(s) currently collaborating on the document. Each user should see the icon of the other user in their document on their computer. Now that both users have the document open for editing, each can make changes and see the edits of the other user. Each user should work on a different paragraph / page / section of the document; trying to work on the same sentence can be problematic.	If you don't see other users' edits, make sure you're viewing the document in Print Layout by clicking **View / Print Layout.** Note that a user will see the edits of another user when the document is saved and refreshed from the Shared Document Library in Office 365 server. Therefore, it is important that Word's **AutoSave** feature is enabled. You can also manually save at any point to refresh. Other users' edits will not be *immediately* visible; there may be some lag as their computer saves and refreshes from the server.
17.	Document Owner: To view the document's edit history, click **Details** in the banner of the document within the Vault window as shown below. The last user who edited the document will be displayed along with the dates and times that they edited it and additional details. 	

Step	Description	Notes
18.	Author: Save and close the MS Word document. Navigate back to the Vault browser and select the **Save to Vault** option. Then click **Complete** to complete your Authoring task as the Collaborative Author. Click **Complete** again.	The Save to Vault option is useful if you are working on the document over a long period of time and do not want to risk losing any changes. It will also allow other users within Vault to see your changes before the document is officially checked back in. If you were not done authoring you would not complete your task. You could log back into Vault and click Edit to continue authoring at a later time. It is extremely important to use the **Authoring Workflow** as a means of communicating when you are done with your edits on the document.
19.	Author: Log out of Vault as the **Author**.	
20.	Document Owner: Within the Word document, confirm that the user icon for the **Author** that had been in the menu bar of the document is now gone. Save and close the MS Word document. The **Document Owner** can remain logged in to complete the subsequent exercises.	

Checking in a Collaboration Document

When you start a collaboration session and edit a document, the document is temporarily saved to a shared drive in Office 365. Changes made by any user who joins the collaboration session are temporarily saved to the Office 365 drive, but not in Vault. In order to save the edited document in Vault, you must check in the document. Checking in the document ends the collaboration session and creates a new minor version of the document in Vault.

When multiple users are editing a document, **only the Document Owner or the user who started the collaboration session** can check in the document and end the collaboration session. Once the session has ended, any additional changes made in Microsoft Word will not be saved in Vault.

Step	Description	Notes
1.	As the Workflow initiator you will receive a notification that the document is authored. You are asked to review the new version and determine next steps. Click the document link in the Notification to view the document	If not all Authoring tasks are completed, an editor may still be working on the document. If you check it in, any edits made after the check in will be lost. This is why it is important to use the Authoring Workflow to govern your collaboration.
2.	You will see the boxes to **Edit**, **Save to Vault, Check in** or **Cancel** (the checkout). Click **Check in** to check the document back into Vault. The check in and Cancel options are also available from the Actions Menu.	Important reminders: Use the Authoring Workflow to govern your collaborating. Do not check in the document until all workflow tasks have been completed. If a user is still editing and the document is checked in, any edits they make after the check in will be lost.
3.	Enter a **Version Description** and click **Continue**.	
4.	The document will be checked in as a new minor version and the state remains in Draft.	

Cancelling a Collaboration Session

Once you have started a collaboration session, you may cancel it to end the session for all users without saving any changes to the document in Vault. **Only the Document Owner or the user who started the collaboration session can cancel it.** No changes that were made to the document during the session will be saved in Vault.

Step	Description	Notes
1.	As the Document Owner, click Edit. Click **Open Word** to open the document in Microsoft Word. The document opens in MS Word for authoring. Add text to the document.	

Step	Description	Notes
2.	Return to your Vault browser window and click Cancel. You will get a Cancel Check Out Confirmation stating "Canceling Editing of the document in Microsoft Office. Are you sure you want to continue?" Click **Continue.**	If there are other people currently editing the document as part of a collaboration, they are not notified of the cancellation. Edits made after the check-out cancellation are not saved. Therefore, it is always best to use an Authoring Workflow when collaborating. Cancel the workflow to notify the editors and then cancel the checkout of the document.
3.	The edits made in Step 1 are not included in the document.	
4.	Log out as the **Document Owner**.	