



Getting Started in the CoP—Document Collaboration

Table of Contents:

View a Collaborative Document	1
Modify an existing Collaborative Document	2
Add a New Document Collaboration	4
Facilitator Tools in Document Collaboration	7
Locate the member's name who is editing the document	6
Clear Current Check-Out	7

The Document Collaboration function within a topic allows you to check out a posted document, save it to your computer, make necessary changes, and then upload it back to the topic.

View a Collaborative Document

Click on the topic title where the document collaboration is housed. To **View** a document, review steps one through four.

Training for Facilitators and Staff

View: All Topic Items | Filter: All Categories | Order By: Date (Recent Updates) | Page: 25 | Go

[+ Add New Topic](#)

ICD-10
 Are you ready? Please check out the posted links. Use the collaboration to add your suggestions for additional needs.
 Tags: icd icd-10
 Comments: 1 Views: 7 Created: 3/3/2011 11:30 AM By: Jeff Doe Updated: 4/8/2011 10:34 AM

To access a Collaborative Document, open the topic. You will see the Collaboration icon on the right side.

1. Choose the **Collaboration** tab on the top right side of the topic.

View Topic

ICD-10
 3/3/2011 11:30 AM

[Back to Community](#) [Bookmark](#)

Community: Training for Facilitators and Staff | Featured: No | Read: Yes | Comments: 1

Are you ready? Please check out the posted links. Use the collaboration to add your suggestions for additional needs.

[Print Topic](#) [Subscribe to Topic](#)

Resources **Collaboration** Workspace Statistics

Resources

[Add Resources](#)

- You have two options: Download **Latest Version** or **Edit Item**. To view the document only, choose **Download Latest Version**. If you wish to make changes to a document, select **Edit Item**.

ICD-10
3/3/2011 11:30 AM

Community: Training for Facilitators and Staff Featured: No Read: Yes Comments: 1

Are you ready? Please check out the posted links. Use the collaboration to add your suggestions for additional needs.

Add Comment

You can **Download Latest Version** to review it, or **Edit Item** to make changes.

Sort by: Oldest First Newest First **DISCUSSION**

Jeff Doe

ICD-10 tools.

Download Latest Version

Edit Item

Document History

Ver #	Date Uploaded	Author
1	4/8/2011 10:34:38 AM	Carolyn Guyton-Ringbloom

Please check out and make your suggestions.

- To View:** choose **Download Latest Version**. A pop up box will appear. Choose to open the document or save it to your computer. When you are finished, just close the document.

Opening 1_Ealert020311_PE.docx

You have chosen to open

1_Ealert020311_PE.docx
which is a: Microsoft Office Word Document
from: http://cop.ahima.org

What should Firefox do with this file?

Open with: Microsoft Office Word (default)

Save File

Do this automatically for files like this from now on.

OK Cancel

Modify an existing Collaborative Document

- Follow steps one through three above. Then,

a. Choose **Edit Item**.

The screenshot shows the top of the ICD-10 document page. At the top right, there are tabs for 'Resources', 'Collaboration', 'Workspace', and 'Statistics'. Below these, the 'Collaboration' section is active, displaying 'ICD-10 tools.' with buttons for 'Download Latest Version' and 'Edit Item'. A callout bubble points to the 'Download Latest Version' button, stating: 'You can **Download Latest Version** to review it, or **Edit Item** to make changes.' Below this, the 'Document History' table is visible:

Ver #	Date Uploaded	Author
1	4/8/2011 10:34:38 AM	Carolyn Guyton-Ringbloom

A second callout bubble points to the table, stating: 'The past versions, the date, and members who edited the document are displayed here.'

- b. First: **Download Latest Version**. Save it to your computer. See screen shot with number three above.
- c. Then select **Check Out Item** so no one else can edit the document at the same time. Work on the document. You may wish to include "track changes" so that others can see your additions and deletions. You have 48 hours to work on the document. (When this time expires, the document will revert to its previous version.)

This screenshot is similar to the previous one but highlights the 'Download Latest Version' and 'Check Out Item' buttons. A callout box contains the following instructions:

1. Choose **Download Latest Version**.
2. **Check Out Item**

Red arrows point from this callout box to the respective buttons in the 'Collaboration' section.

- 2. When you are finished with your changes, save the document again.
 - a. Next choose **Browse** to upload the document from your computer.
 - b. Add notes about your changes if desired.
 - c. Choose **Update Document**. Your revised document will be added and you will see it at the bottom of the versions.
 - d. Then choose **Check Back In**.

This screenshot shows the 'Collaboration' section with the 'Check Back In' button highlighted. Below it, the 'Upload New Version' section is visible, featuring a 'Browse...' button and a 'Note:' text area. A callout box provides the following instructions:

1. Choose **Browse**.
2. Add notes as desired.
3. Select **Update Document**.
4. Select **Check Back In**.

Below the 'Update Document' button, the 'Document History' table is shown again:

Ver #	Date Uploaded	Author
1	4/8/2011 10:34:38 AM	Carolyn Guyton-Ringbloom

3. Your added revision will show up at the bottom of the collaboration list.

Collaboration

ICD-10 tools.

[View current version here](#)

[Check Out Item](#)

Document History


Ver #	Date Uploaded	Author
1	4/8/2011 10:34:38 AM	Carolyn Guyton-Ringbloom
2	4/8/2011 2:22:31 PM	Jeff Doe

Please check out and make your suggestions.

See changes on page 1.

Add a New Document Collaboration

1. Click on **Add a topic**. Create a new topic on the basic page, then select **Post Topic and Continue to More Options**.

 **COMMUNITY: Training for Facilitators and Staff**

Basic Info

Topic Title: Summer Leadership Meetings * Required 1. Create the Topic.

Topic Description: Editor: Basic Text Box Rich Text Editor

* Required


Category: GENERAL * Required 2. Choose Post Topic and Continue to More Options.

Tags: + Add Tag

2. Go to page three of the Dashboard and choose the Collaboration link.


Choose Collaboration.

TOPIC TITLE: Summer Leadership Meeting




[Basic Info](#)

- Title
- Description
- Category
- Tags




[Advanced Options](#)

- Display Dates
- Workspace
- Event




[Resources](#)

- Files
- Links



[Collaboration](#)

- Document for check in/out
- Doc History



[Delete This Topic](#)

[Go Back To Topic List](#)

3. On the Document Collaboration Page, complete the following:
- Check the **Activate Document Collaboration** box.
 - Add a title in the **Collaboration Description** box.
 - Add notes if desired in the **Document Note** box.
 - Select **Browse** and add the document.
 - Select **Attach Document** After it uploads, choose **Return** on the bottom to go to the topic dashboard. Then if you are done, select **Go Back to Topic List**.

COMMUNITY: Student

Collaboration **TOPIC TITLE: Summer Leadership Meeting**

The collaboration feature provides a file manager option where your community team members may successively check-out, change and then check-in a single document. The history of revisions remains available for review.

Activate Document Collaboration

Collaboration Description: Leadership Meeting Suggestion List * Required

Document Note: * Required

File: Browse... * Required

Complete: 27.6 KB at 1.77 MB/s
progress bar

Ver.	View	Uploaded	By	Note	Delete
1		4/8/2011 2:50 PM	Jeff Doe	Add your suggestions	

1. Check the box: **Activate Document Collaboration**.
2. Name the document in Collaboration Description.
3. Add notes as desired.
4. Choose **Browse** and attach document from your computer.
5. Choose **Attach Document**.
6. Document will upload and it will be visible on the page.
7. Choose **Return** when complete.

4. Then it will appear under the Collaboration tab when you open the topic.

The screenshot shows the 'View Topic' interface for 'Summer Leadership Meetings'. At the top left, the title 'Summer Leadership Meetings' is displayed in red, with the date '4/11/2011 12:00 PM' below it. To the right are buttons for 'Edit Topic', 'Bookmark', and 'Back to Community'. Below this is the community name 'Training for Facilitators and Staff' and status indicators: 'Featured: No', 'Read: Yes', and 'Comments: 0'. A red line underlines the text 'Join AHIMA at the leadership meetings July 15-17, 2011 in Chicago.' On the right side, there are buttons for 'Print Topic' and 'Subscribe to Topic', and a tabbed interface with 'Resources', 'Collaboration', 'Workspace', and 'Statistics'. The 'Resources' tab is active, showing 'Resources' and the message 'Topic has no resources.'

The screenshot shows the 'Collaboration' page for 'Leadership Meeting Suggestion List'. At the top are buttons for 'Print Topic' and 'Subscribe to Topic'. Below are tabs for 'Resources', 'Collaboration', 'Workspace', and 'Statistics'. The 'Collaboration' tab is active, showing the title 'Leadership Meeting Suggestion List' and buttons for 'Download Latest Version' and 'Edit Item'. Below this is a 'Document History' table:

Ver #	Date Uploaded	Author
1	4/11/2011 12:01:03 PM	Carolyn Guyton-Ringbloom

Below the table is the text 'Please add your suggestions'.

Facilitator Tools in Document Collaboration

1. Locate the topic.

a. Select the **Edit Pencil** on the left side of the topic.

The screenshot shows a topic card for 'ICD-10'. On the left, there is a green checkmark, a '0' in a blue circle, and a row of five stars. A red arrow points to a pencil icon. The main text reads 'ICD-10' in red, followed by 'Are you ready? Please check out the posted links. Use the collaboration to add your suggestions for additional needs.' Below this are 'Tags: icd icd-10' and 'Comments: 1 Views: 11 Created: 3/3/2011 11:30 AM By: Jeff Doe Updated: 4/8/2011 2:22 PM'. On the right, there are icons for a document, a computer, and a red plus sign.


b. Choose the **Collaboration** page from the Dashboard.

The screenshot shows the 'Collaboration' dashboard for 'TOPIC TITLE: ICD-10'. It features six icons representing different tools: 'Basic Info', 'Advanced Options', 'Resources', 'Collaboration', 'Facilitator Settings', and 'Delete This Topic'. A red arrow points to the 'Collaboration' icon. Below each icon is a list of features:

- Basic Info:** Title, Description, Category, Tags
- Advanced Options:** Display Dates, Workspace, Event
- Resources:** Files, Links
- Collaboration:** Document for check in/out, Doc History
- Facilitator Settings:** Status, Permissions, Announcement, Featured
- Delete This Topic:** (No features listed)

At the bottom left, there is a 'Go Back To Topic List' link.

- c. The person who has the document checked out will be listed in **red**.



COMMUNITY: *Training for Facilitators and Staff*
 TOPIC TITLE: *ICD-10*

The collaboration feature provides a file manager option where your community team members may successively check-out, change and then check-in a single document. The history of revisions remains available for review.

Activate Document Collaboration

Collaboration Description: * Required

Document Note: * Required

File: * Required

progress bar


Ver.	View	Uploaded	By	Note	Delete
1		4/8/2011 10:34 AM	<u>Carolyn Guyton-Ringbloom</u>	Please check out and make your suggestions.	
2		4/8/2011 2:22 PM	<u>Jeff Doe</u>	See changes on page 1.	

Check-out: *Document is currently checked out by: Jeff Doe on 4/8/2011 2:30:50 PM*

2. Clear Current Check-Out

If you, as facilitator, want to check it back in, follow steps a through b above.

- a. Select the **Clear current check-out lock**.



COMMUNITY: *Training for Facilitators and Staff*
 TOPIC TITLE: *ICD-10*

The collaboration feature provides a file manager option where your community team members may successively check-out, change and then check-in a single document. The history of revisions remains available for review.

Activate Document Collaboration

Collaboration Description: * Required

Document Note: * Required

File: * Required

progress bar

Ver.	View	Uploaded	By	Note	Delete
1		4/8/2011 10:34 AM	<u>Carolyn Guyton-Ringbloom</u>	Please check out and make your suggestions.	
2		4/8/2011 2:22 PM	<u>Jeff Doe</u>	See changes on page 1.	

Check-out: *Document is currently checked out by: Jeff Doe on 4/8/2011 2:30:50 PM*