How to Use Collaboration

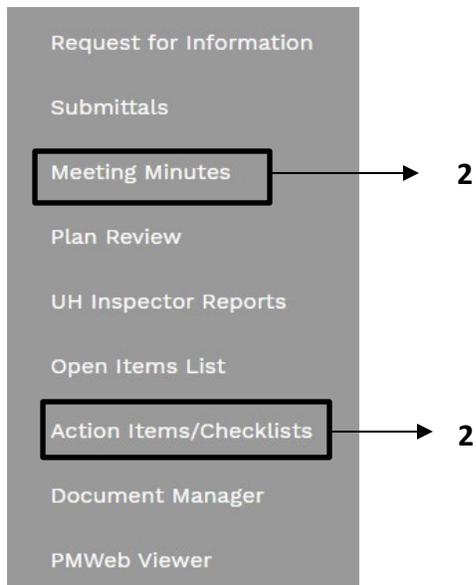**Overview:** The COLLABORATE tab allows a user to send records to individuals not within a record work flow for their review and input.

Reference: N/A

1- Click on **FORMS** from the buttons on the left.

2- Under **FORMS**, select the record to be used to calibrate such as M**eeting Minutes** or A**ction Items/Checklists**.
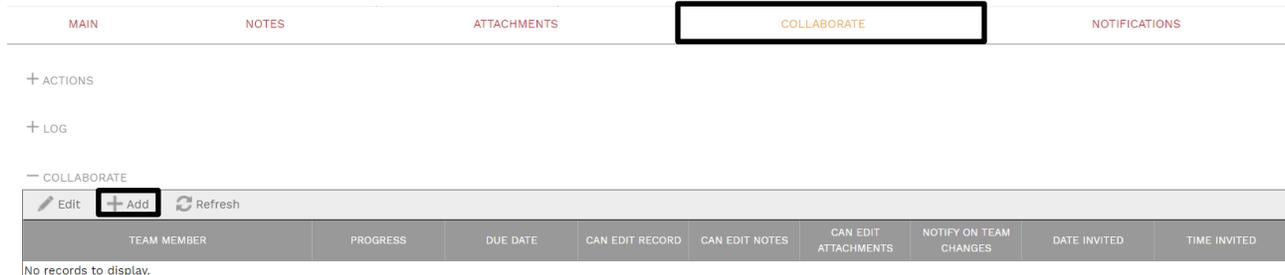
3- Select or add the **Project** using the ➕ button**.**

4- Add a D**escription**.

5- Add a L**ocatio**n.

6- **Meeting date** is automatically displayed.

7- Add **Start time.**

8- Add **End Time.**

🖫 9- Click the Button on the top bar.

Project*	1000263-Interim - Nick Merry Test ▼
Type	▼
Record #*	001
Meeting #	1
Description	4
Location	5
Meeting Date	6 01-03-2023 📅
Started	7 🕐
Ended	8 🕐
Status / Revision	Draft ▼ 0

NEXT MEETING

Next Location	
Meet Date	01-03-2023 📅
Start	🕐

10- Click on **"Collaborate"** tab at bottom.

11- Click **+Add**.

MAIN	NOTES	ATTACHMENTS	COLLABORATE	NOTIFICATIONS

+ ACTIONS

+ LOG

– COLLABORATE

Edit + Add ↻ Refresh

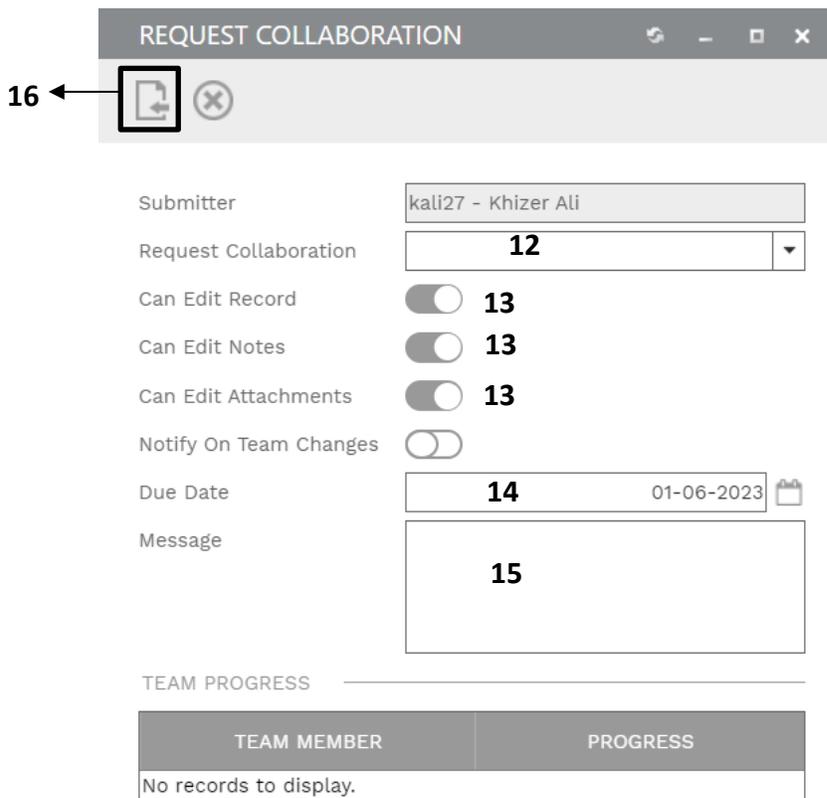| TEAM MEMBER	PROGRESS	DUE DATE	CAN EDIT RECORD	CAN EDIT NOTES	CAN EDIT ATTACHMENTS	NOTIFY ON TEAM CHANGES	DATE INVITED	TIME INVITED
No records to display.								

12- Pop up window select **Request Collaboration** to invite others.

13- Select buttons on left to allow "**Editing**" of record, notes and attachment.

14- Add the D**ue Date**.

15- In the message box provide further comments as necessary.

**16-** Click the **Save and exit** button.

REQUEST COLLABORATION ↻ – ▢ ✕

16 ←

Submitter	kali27 – Khizer Ali
Request Collaboration	**12** ▼
Can Edit Record	⬤ **13**
Can Edit Notes	⬤ **13**
Can Edit Attachments	⬤ **13**
Notify On Team Changes	○
Due Date	**14** 01-06-2023 📅
Message	**15**

TEAM PROGRESS ─────────

TEAM MEMBER	PROGRESS
No records to display.	

17- In "Actions" box, click **"Comment"** or **"Review Complete"** as applicable.

18- Click the **Save** button.
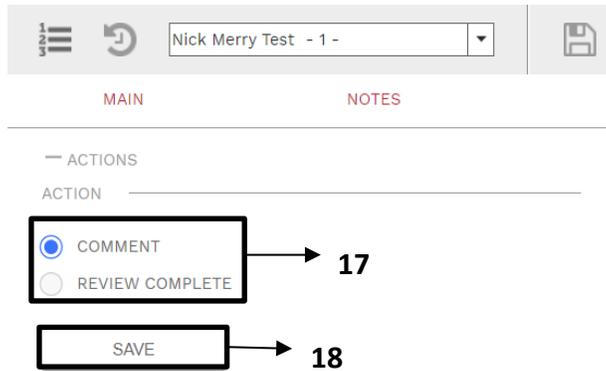
19- Under **"Notifications"** tab, click **+Add**.
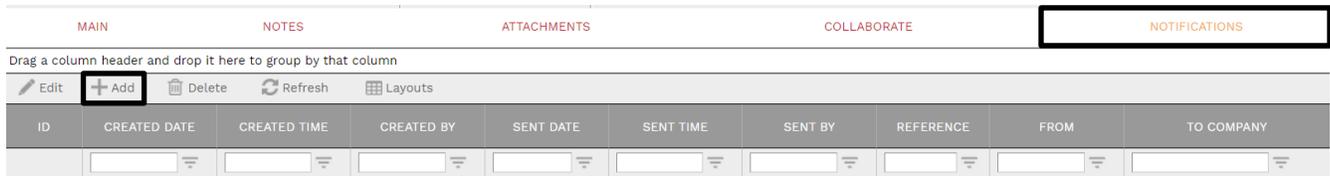
20- **Status** field – Select from drop down menu.

21- **Notification type** field – Select from drop down menu.

22- **Reference** field – Enter brief description.

23- **Due Date** – Enter desired date and time.

24- **Reminder Completed** – Click.

25- **Completed Date** – Select desired date and time.

26- Within the **"Select To Attach To Email"** box, click on the desired files to include in the email notification.

27- Click on "**Save**" icon in the top bar of window.

28- **Process Complete.**