

365OMNIDRIVE WEB PORTAL EDITOR



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TABLE OF CONTENTS

Getting Started	3
Edit Files in 365OmniDrive's Web Portal Using the Collaborative Web Editor	3
Revisions.....	3
Anonymous Editing Permissions	3
Notifications and File Locking	3
Launching the Collaborative Web Editor	4
Inviting Coauthors to Collaborate	7
Chatting with Co-authors	9
Editing with Co-authors.....	10

GETTING STARTED

Edit Files in 365OmniDrive's Web Portal Using the Collaborative Web Editor

With the real-time **Collaborative Web Editor**, you can edit documents, spreadsheets, and presentations when working in 365OmniDrive's web portal, without needing to download a separate application or navigate away from the system. Additionally, the Collaborative Web Editor allows you to make these changes simultaneously with multiple co-authors, and lets you see each edit in real time.

Advanced functionality includes:

- Access a wide range of formatting tools to help you update fonts, paragraph formatting, charts, tables, images, style types, etc.
- Edit simultaneously with co-authors and view their changes in real time.
- Send and receive instant chat messages.
- Add, view, and manage changes and comments.

Revisions

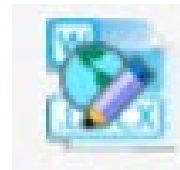
- Files automatically save ten seconds after the last edit.
- For security purposes, an editing session ends after one hour of inactivity.
- Editing a file within the Collaborative Web Editor generates a revision in 365OmniDrive.

Anonymous Editing Permissions

When sharing a file, users can grant anonymous editing permissions on public share links. Anonymous editing permissions allow anyone with access to the share link to edit the file using the Collaborative Web Editor.

Notifications and File Locking

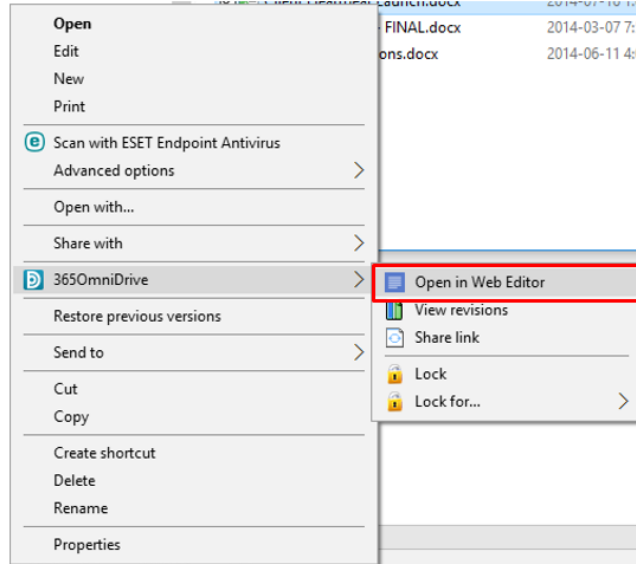
- **In the web portal:** if a person is actively editing a file from within the Collaborative Web Editor, the system marks the file with a "Web Edit" icon. Team Share users will still be able to launch this file from the web portal using the Collaborative Web Editor.
- **In the desktop client:** if a person is actively editing a file from within the Collaborative Web Editor, the File and Folder Locking feature will automatically protect the file and mark it with a locked icon. Team Share users will not be able to edit this file using applications on their computers (local machines).



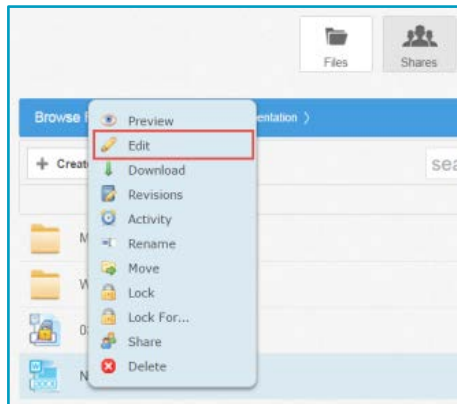
Launching the Collaborative Web Editor

To open the Collaborative Web Editor:

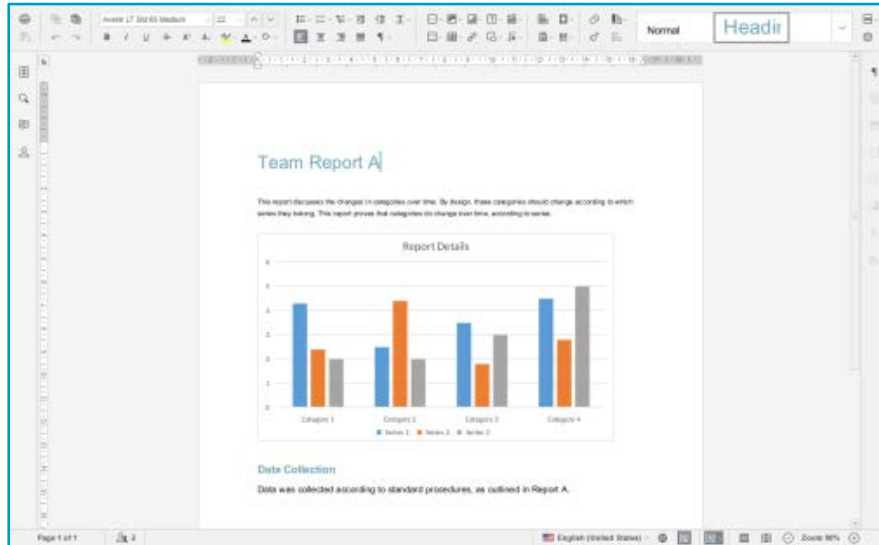
1. If you are working from the **desktop client**, right-click a supported file and select “**Open**” in web editor.



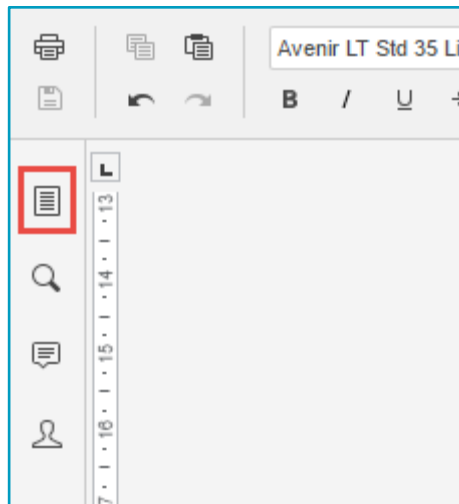
2. If you are working in the **web portal**, navigate to a supported file, right-click the file, and select “**Edit.**”



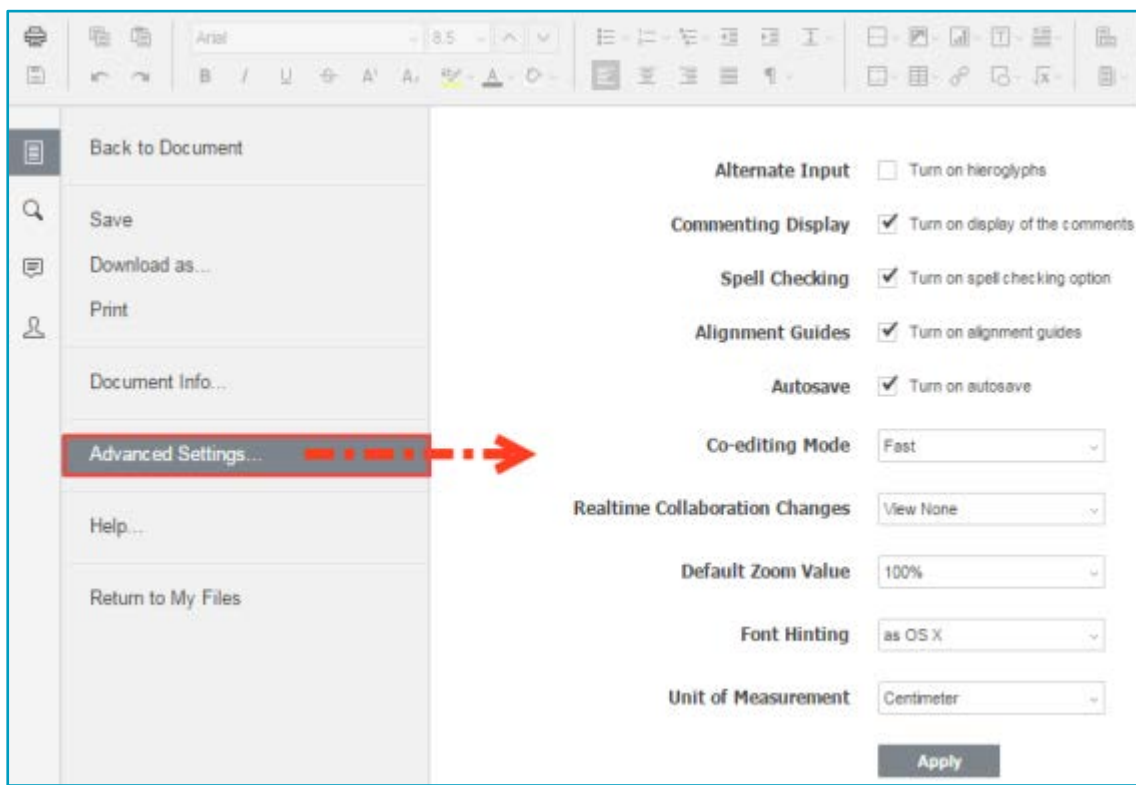
3. The file opens in a new tab.



4. To configure advanced settings, click the **“Manage”** button. The left-hand navigation bar expands.



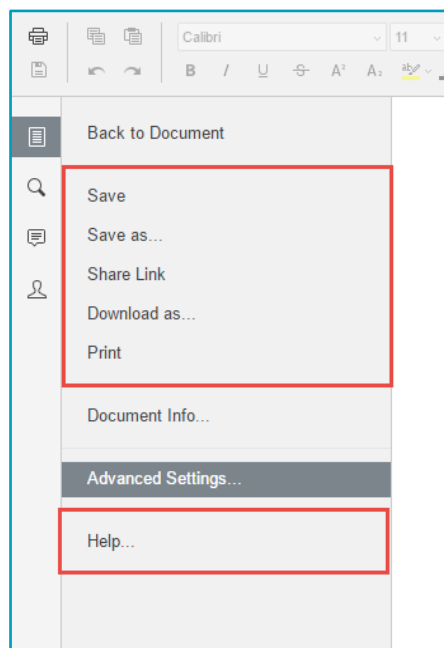
5. In the left-hand navigation bar, click the “**Advanced Settings**” link to turn on and off features, such as commenting, spellcheck, and auto-save. You can also choose to view or disable real-time collaboration changes.



6. While in the “Files” section, you can click:

- a. **Save:** to save the file.
- b. **Save as:** to save the file with a new name. The system will give you the option to save the file to a new file format or a new location (within the same root folder).
- c. **Share Link:** to generate a share link for a standard user or guest user. The system gives the recipient privileges to co-edit the document using the Collaborative Web Editor.
- d. **Download as:** to download the file to your computer. The system presents you with the option to download the file in your preferred file format.
- e. **Print:** to print the document using your preferred printing device.
- f. **Help:** to view a comprehensive listing of all available functionality.

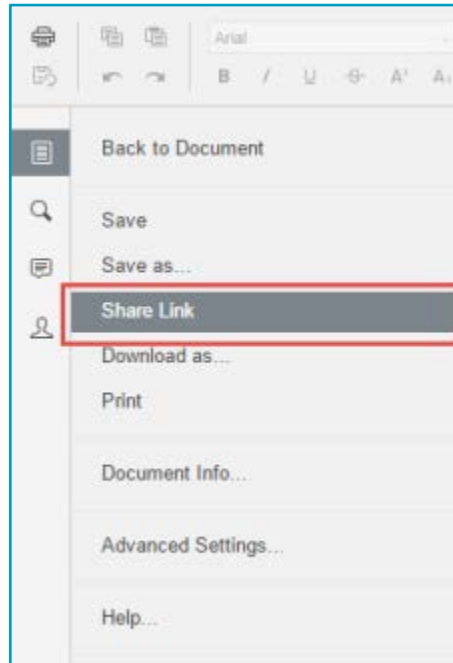
7. Click the “**Back to Document**” link to collapse the left-hand navigation menu.



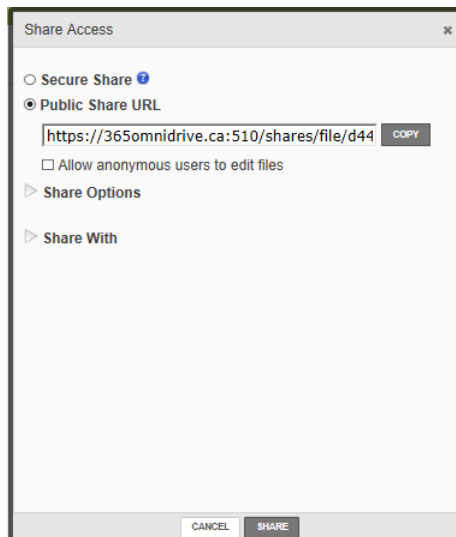
Inviting Coauthors to Collaborate

To collaborate on a single file in real time, you can create a share link from the web portal or your desktop client. You can also invite users to collaborate from within the Collaborative Web Editor.

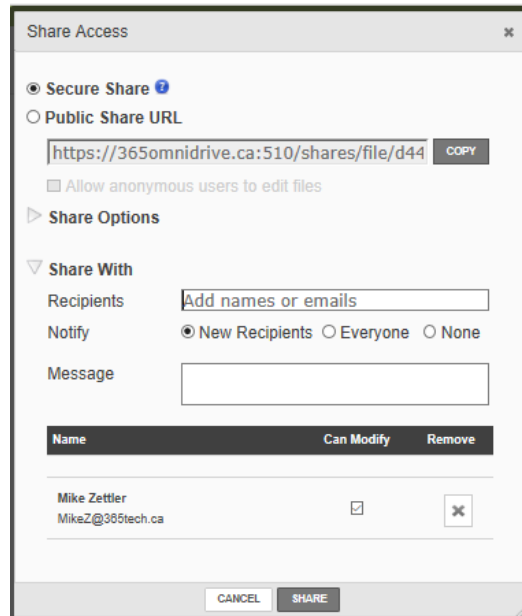
1. Click the “File” tab and select “**Share Link.**”



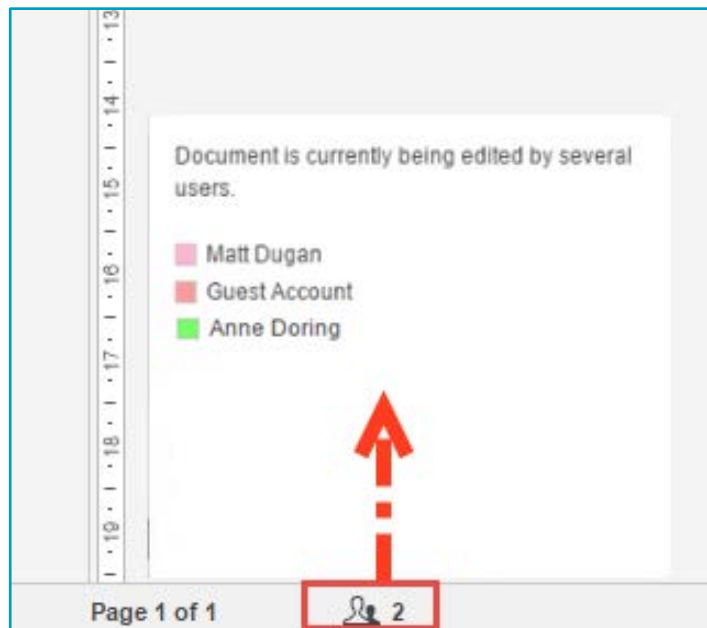
2. The “Share Access” dialog box opens. You can create a public share link to allow anonymous users to edit the file:
 - a. Select the “**Public Share URL**” radio button, and then click the “**Copy**” button to ensure that you capture the file’s URL.
 - b. Select the “**Allow anonymous users to edit files**” checkbox to let anyone who launches the share link to edit the file using the Collaborative Web Editor.
 - c. Click the “**Share**” button to save your settings and paste the share link in an email, chat, or other messaging device.



3. Alternatively, you can create a secure share link to require recipients to login:
 - a. Select the **“Secure Share”** radio button.
 - b. In the **“Recipients”** field, enter the name or email address of the co-author, which will display in the lower portion of the screen.
 - c. Select the **“Can Modify”** checkbox, which allows the user to edit the file.
 - d. Click the **“Share”** button to send the share invitation to the recipient(s).



4. To view a list of co-authors, click the **“View Users”** button. A pop-up window opens, showing a list of users that are actively editing the document.



5. When the user makes changes, the edits are visible immediately and marked with a vertical bar.



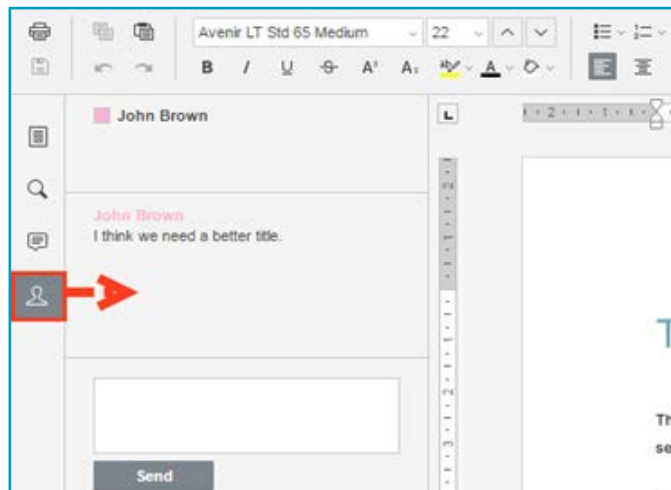
6. Hover over the vertical bar to view editing details.



Chatting with Co-authors

When you are collaborating on a document in real time, you can use the chat feature to communicate and share ideas with co-authors.

1. In the left-hand navigation bar, click the “**Chat**” button to reveal the chat window.



2. Enter your message in the “Chat” dialog box and click the “**Send**” button. An icon opens over the recipient's chat button, indicating that a new message is available to view.



Editing with Co-authors

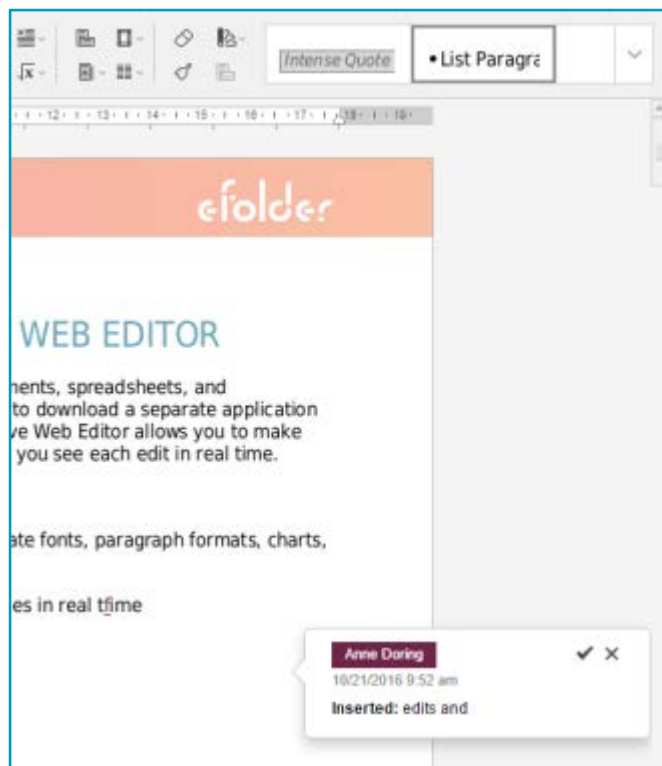
The Collaborative Web Editor allows you to edit using its “Track Changes” feature. You can also embed comments into files to aid in the collaboration process.

NOTE: If you later download the file and open it on a local machine, these edits and comments will remain, and display in all applications that support track changes and commenting (for example, Microsoft Office products).

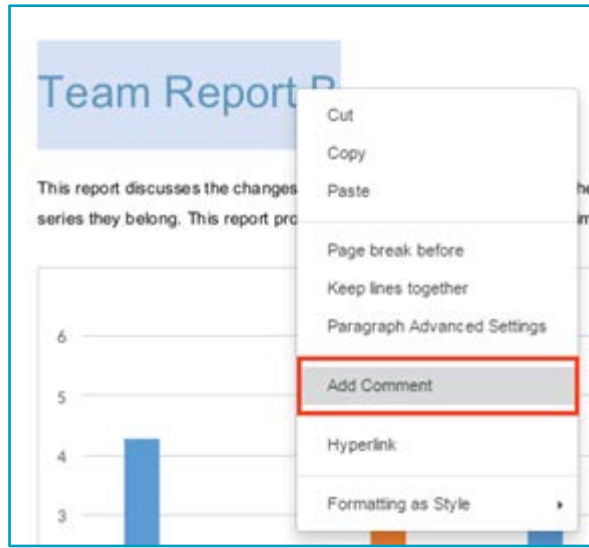
1. To turn on track changes, click the **“Track Changes”** button found at the bottom right-hand corner of the screen.



2. All changes made by you and co-authors will display in bubbles, allowing other users to accept or reject these changes.



- To add a comment, highlight the appropriate portion of the file, right-click the highlighted content, and then select “**Add Comment.**”

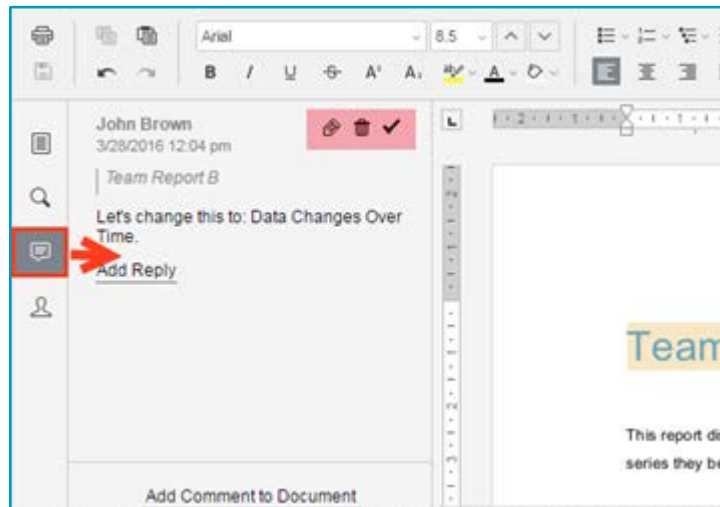


- A pop-up bubble displays, allowing you to type a comment.



- To view all comments in the document, or to respond to an existing comment, click the “**Comments**” button in the left-hand navigation bar.

NOTE: You can use the toolbar to edit, delete, or mark a comment as resolved.



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