

You can collaborate with document owners in creating a document. However, only document owners can modify the document properties and submit the document for review.

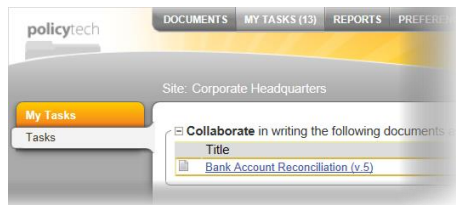
Access an Assigned Document

You can access a document in the following ways:

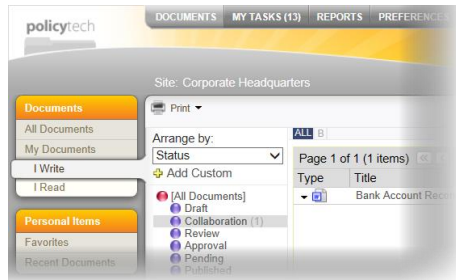
In your email application, open the **Writing collaboration required** message and click the link.

Tom Hansen requires your collaboration in writing "[Bank Account Reconciliation](#)".
Click the document title above to open and edit the document.

In PolicyTech, click **MY TASKS**, find the document under **Collaborate**, and then click the link.

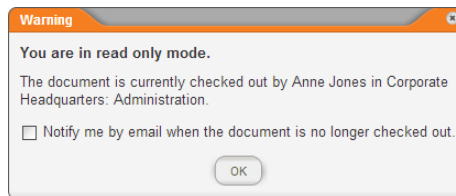


In PolicyTech, click **DOCUMENTS**, then **My Documents**, then **I Write**, and then **Collaboration**.



Note: The document remains in collaboration status until the last assigned writer clicks **Finished Writing**. It then returns to draft status, where you can no longer work on it.

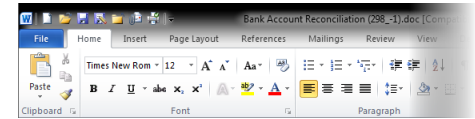
Note: If you see the message to the right when you try to open a document, you can choose to have PolicyTech notify you when the document is available, or you can click **OK** to view the document in read-only mode.



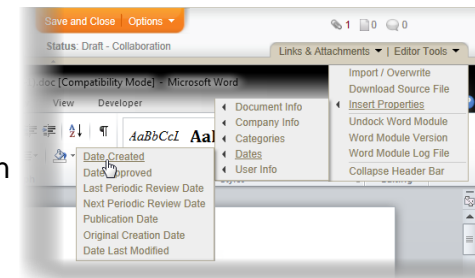
Collaborate on a Document

You can help the document owner and other assigned writers:

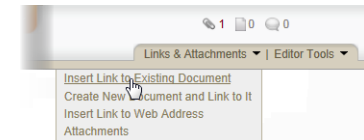
Microsoft® Word or Excel® Documents. You can use the full functionality of Word or Excel to write the document.



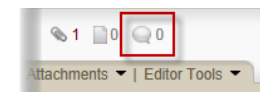
Insert Properties. You can insert fields that show document properties. Click **Editor Tools**, then **Insert Properties** to see what you can insert. Inserted fields are automatically updated as document properties change.



Insert Links. To link to a related document, place the cursor where you want the link inserted, click **Links & Attachments**, then **Insert Link to Existing Document**.



Discussions. To start or view a discussion about a document, click the discussion icon in the upper right corner.



Finished Writing. To close the document and continue writing later, click **Save and Close**. When you've completed your writing task, click **Finished Writing** and follow the prompts. The document owner is notified that you've completed your task.

