

Co-Edit Files

Files can be opened and co-edited from either the Posts or Files tab within a Channel or from a Chat message.

Quick Reference Guide

Open Files

There are three ways to open the file from Teams.

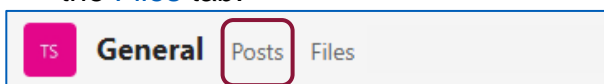
- **Open in Teams (default)** – opens the file within Teams.
- **Open in desktop app** - opens the file in the relevant desktop app, e.g. Word, PowerPoint or Excel.
- **Open in browser** - opens the file in Office Online.



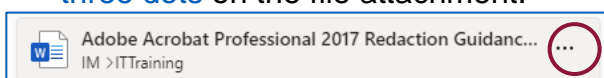
If lots of changes are required, it is recommended **Open in desktop app** for increased functionality.

Open Files from a Channel's Posts Tab

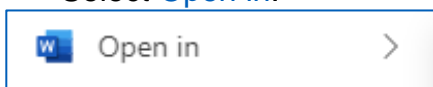
- Select the appropriate **Channel** → click the **Files** tab.



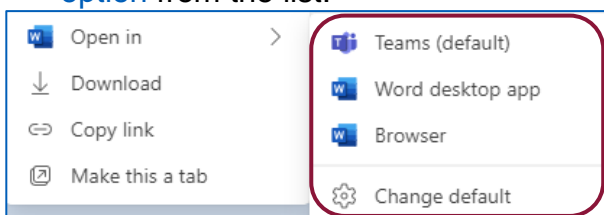
- Locate the desired **Post** → click the **three dots** on the file attachment.



- Select **Open in**.

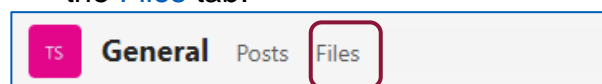


- To **open the file** → select the desired **option** from the list.

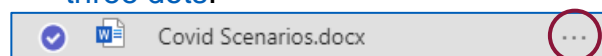


Open Files from a Channel's Files Tab

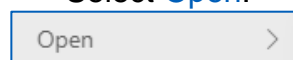
- Select the appropriate **Channel** → click the **Files** tab.



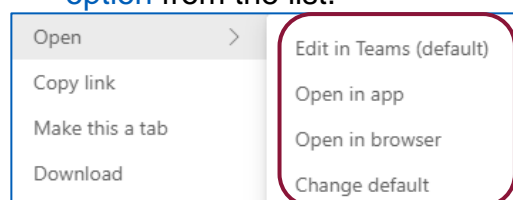
- Locate and desired **file** → click the **three dots**.



- Select **Open**.

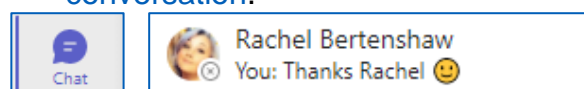


- To **open the file** → select the desired **option** from the list.

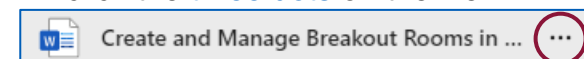


Open Files from a Chat Message

- Click **Chat** → select the relevant **conversation**.



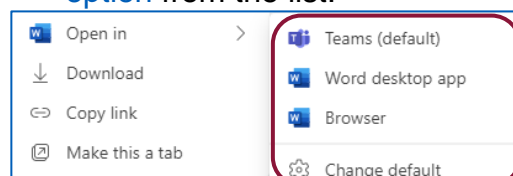
- Locate the desired **Chat message** → click the **three dots** on the file.



- Select **Open in**.



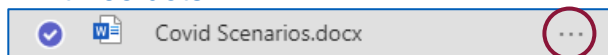
- To **open the file** → select the desired **option** from the list.



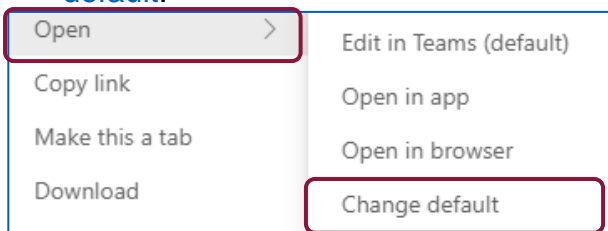
Change Default

Teams allows users to change the default method of how files will open in Teams. This can be done from either the Posts or Files tab, from within a Channel or from a Chat message.

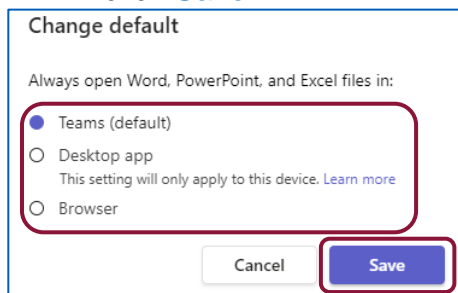
- Locate the desired file → click the **three dots**.



- Select **Open in / Open** → click **Change default**.



- Select the **preferred way** to open files → click **Save**.



The default settings will be updated for the current device.

Co-Edit Files

Once opened, multiple users can access and work on the file at the same time.

If other users are co-editing the file, their initials will display within a coloured circle on the ribbon.

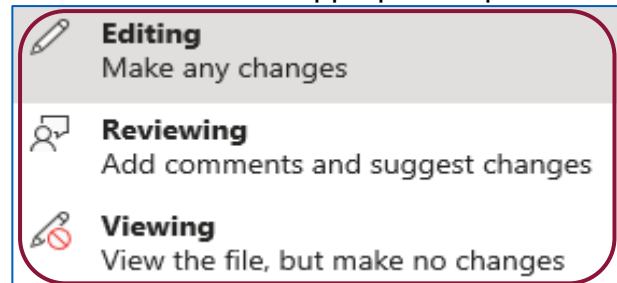


Any changes made by other users will be updated in real time.

- Click on the **Pencil icon** and select the **Editing** or **Reviewing** options.



- Select the most appropriate option.

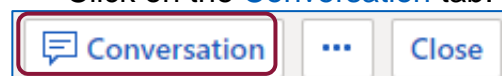


- Click on the **Comment bubble** to **Show / Hide Comments** as required.



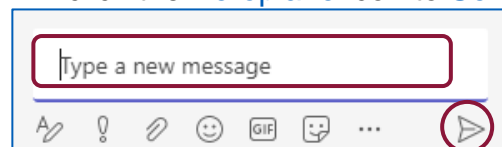
If the file was **Opened in Teams**, the **Conversation pane** can be used to **chat with co-editors**.

- Click on the **Conversation** tab.

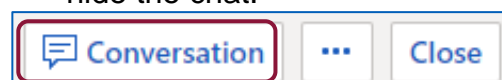


The **Conversation Pane** will appear at the right-hand side of the file.

- Type in any desired messages and click the **Aeroplane icon** to **Send**.



- Click on the **Conversation** tab again, to hide the chat.



Any changes made to the file will save automatically.

Once finished with the file, it can be closed.

To book training or speak to a trainer, please get in touch via:
training@imerseyside.nhs.uk