

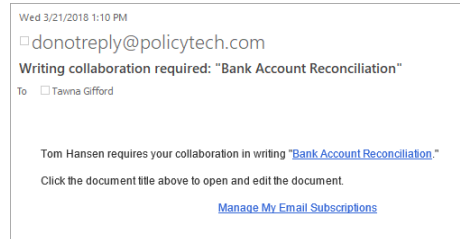
## Quick Reference — Writer (editing via Office Online Integration)

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.

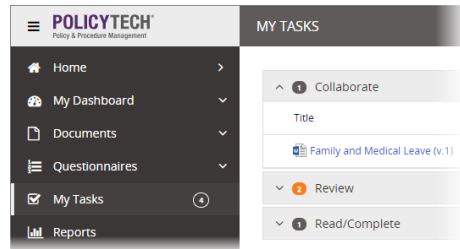
### Access an Assigned Document

You can access a document in the following ways:

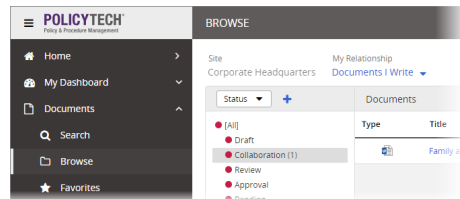
In your email application, open the **Writing collaboration required** message and click the link.



In PolicyTech, click **My Tasks**, find the document under **Collaborate**, and then click the link.

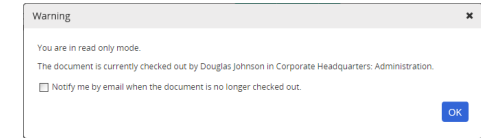


In PolicyTech, click **Documents**, then click **Browse**. For **My Relationship**, click **Documents I Write**, then click **OK**.



**Note:** The document remains in Collaboration until all writers are done. It then returns to the document owner in Draft status, where you can no longer work on it.

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



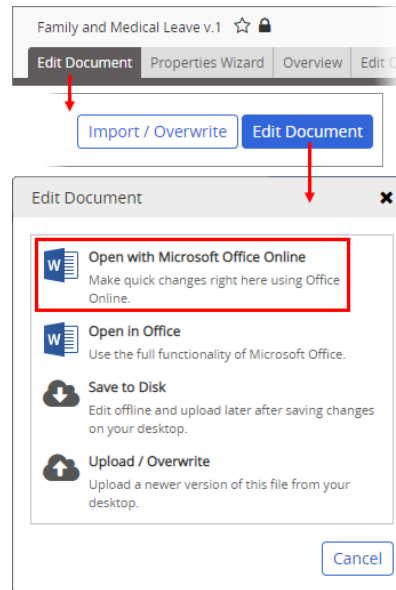
## Quick Reference — Writer (editing via Office Online Integration)

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### Collaborate on a Document

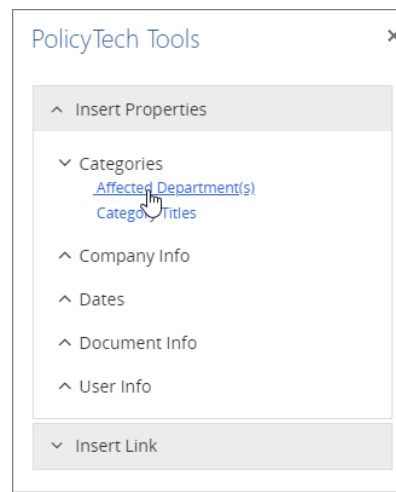
#### 1. Edit using Word Online.

Click the **Edit Document** tab, click the **Edit Document** button, and then click **Open with Microsoft Office Online**.



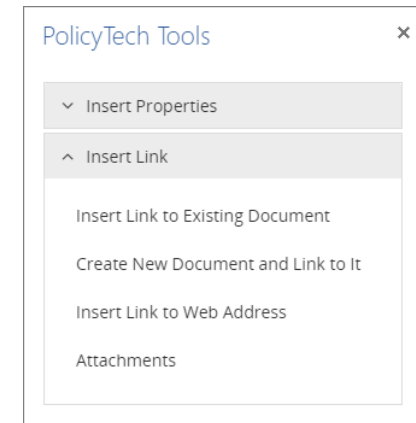
#### 2. Insert a Properties Field.

From the **Insert Properties** menu in the **PolicyTech Tools** pane, you can insert automatically populated data fields containing document properties, such as the document owner or approval date.



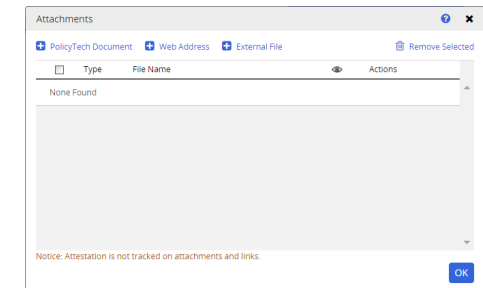
#### 3. Link to a Document or Website.

Place the cursor where you want a link inserted, click to expand the **Insert Link** menu, click a link option and follow the prompts.



#### 4. Attach a File.

In the **Insert Link** menu, click **Attachments**, click an attachment type and follow the prompts.



#### 5. Finish writing.

Click **Back to PolicyTech**, click **Finished Writing** and follow the prompts.

