How to Setup a Collaboration Workspace in Chalk and Wire

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Contents

How to Setup a Collaboration Workspace in Chalk and Wire ................................................................. 1
Setting Up the New Workspace ..................................................................................................................... 1
Adding Members to your Workspace ............................................................................................................. 4
Adding a File to Your File Library .............................................................................................................. 6
Member Accepting the Collaborative Space Invitation .................................................................................. 8
Members Accessing the Uploaded File ........................................................................................................ 9
  Checking Out the Document ......................................................................................................................... 9
  What do the Icons Mean to the Right of the File within the Collaboration File Library ......................... 10
Checking Out the Document to View, Add Comments, and Edits ............................................................. 11
  Checking the Document Back In ................................................................................................................. 12
How to View the Document’s History ........................................................................................................ 13

If you create a collaboration workspace, you will be able to upload file(s) where you and your members that have access to your workshop can view and edit.

Setting Up the New Workspace

1. Click the three vertical lines.
2. Select Work.

4. Within the “Workspace Name” field, enter in your new workspace name.
5. Click Create Workspace.

6. Now you will see the new workspace being listed below the “My Workspace” section.
Adding Members to your Workspace

7. Click on the workspace name.

8. Click Members.

9. Click Invite Members to Workspace.
10. Click **Departments**.

11. Click on the department that the member is located in.

12. Type in the member’s last name and then select the member’s name.
13. The member’s name is now included in the New Members panel.
14. Repeat steps 8-10 for any additional members that you want to be added to your workspace.
15. Click Done.

16. Change the “Manage File Library” for each of your members so the option is set to “Yes”.

Adding a File to Your File Library

1. Click File Library.
2. You now see the main parent folder for your workspace.

3. *(Optional)* Create a folder within the workspace parent folder to organize your files. Click Add.

4. Where you see “Enter a new name” type in a name for the new folder.

5. Here in this example, we created a new folder called “Lesson Plans”.

6. Select your new folder (if you created one). If you did not create a new folder than click on the workspace parent folder.

7. Hover over *Upload Files*.

8. Click *Add File*. 
9. Do one of the following options:
   a. Drag the file to the window
   b. Click “Add files” and then locate and select your file
   c. Click “Choose from Dropbox” and then locate and select your file

10. The file is now located in your workspace File Library.

Member Accepting the Collaborative Space Invitation

1. If you have been added to someone’s collaborative space, you will see the invitation on the bottom right of your Dashboard.
2. Click the “Accept” button to gain access to the collaborative space.
3. Click the link to enter the collaborative space.

Members Accessing the Uploaded File

Checking Out the Document

1. Click the link to the uploaded file.
2. If you don’t see the file than the file is not at the parent folder but within a subfolder.

What do the Icons Mean to the Right of the File within the Collaboration File Library

- **View File**
- **Check Out**
- **History**
- **Download**
- **Edit**
- **Upload Files**
- **Delete**
Checking Out the Document to View, Add Comments, and Edits

1. Click the “Check Out” icon.

2. Click the “Check Out” button.

3. Click the “Download” icon.

4. If you receive this message, click “Open Document in New Window”.
5. Go to the location on your computer where the file has been downloaded. (Note: If you are on PC, you may want to check your Download folder.)
6. Click on the file and select Open.
Checking the Document Back In

1. Once you have looked over the document and added in your edits and comments, you will click the Check in icon.

2. Do one of the following options:
   a. Drag the file to the window
   b. Click “Add files” and then locate and select your file
   c. Click “Choose from Dropbox” and then locate and select your file

3. Click the Start button.
4. Click the Close button.
5. Notice that the file is now on version 2. Every time you checkout a document and then check it back in, the version will move up one number.

**NOTE:** If you just wanted to check in the document without saving a previous version or if you have not made any edits or comments then click the “Cancel Check Out & Release” button.

**How to View the Document’s History**

1. Click the **History** icon.

2. You should see all of the times the document has been changed.
3. If you just want to view the document, you can click either the View or Download icon since they both options will download the file to your local machine.