

Document Locking

Software Support - 2023-06-29 - Documents

Documents being edited via the desktop can be locked so only that user can upload a new document version.

You may also download a document to work on and want to stop others from changing it before you upload a new version.

(You don't have to lock a document to edit it if you think it's unlikely anyone else will be making changes simultaneously).

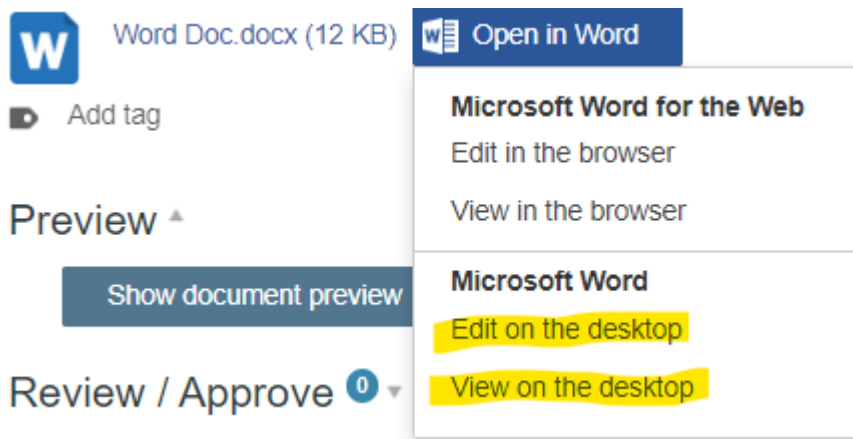
Alternatively, you could lock a document to stop others from editing it if you're wanting to compile feedback.

That way, you can then make the changes yourself rather than letting the users update the document directly.

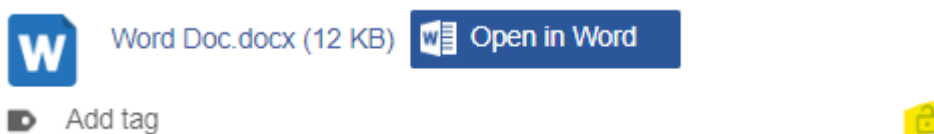
The "Edit in the Browser" feature, automatically locks the document when you open it & unlocks when saved.

DESKTOP

When selecting "edit or view" on the desktop via the document.

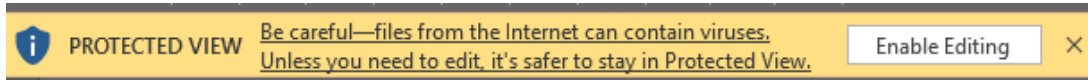


I confirm at that stage; it will not lock the document as shown below...



The document opens via your installed MS application and presents this protection

message.



Once you've pressed the "Enabled Editing" button as shown above.

I confirm the document will now be locked to that user.



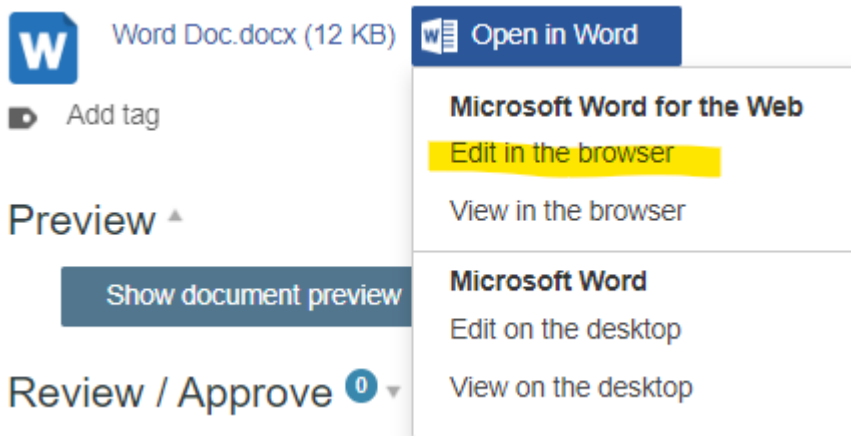
Please note: If you do not "Enable Editing" then the document will not lock to that user.

The document becomes unlocked only when the user has closed their MS application.

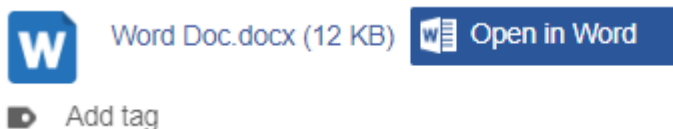


BROWSER


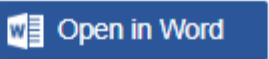
Selecting "Edit" in the browser via the document.




I confirm it'll lock the document straight away to that user.

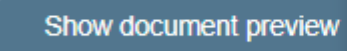


Whereas selecting "view" in the browser via the document.

 Word Doc.docx (12 KB)
 

 Add tag

Preview [▲]

 Show document preview

Review / Approve ⁰ ▼

Microsoft Word for the Web

Edit in the browser



View in the browser



Microsoft Word

Edit on the desktop


View on the desktop

I confirm it will not lock the document as shown below...


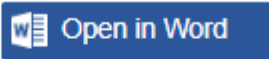
 Word Doc.docx (12 KB)
 


 Add tag
 

If the user viewing the document tries and edit, they'll receive a "read-only" message.


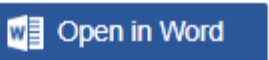
 **Read-only** This {doctype} was opened in read-only mode


Only if they click "Edit Document" will the document become locked to that user.

 Word Doc.docx (12 KB)
 

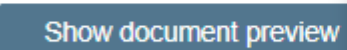
 Add tag
 

While a user is editing a document via the browser, it is locked, but others can join the session.

 Word Doc.docx (12 KB)
 

 Add tag

Preview [▲]

 Show document preview

Review / Approve ⁰ ▼

Microsoft Word for the Web

Join editing session in the browser


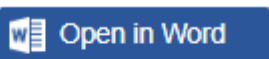
View in the browser



Microsoft Word

Edit on the desktop

View on the desktop

However, once a user has closed their browser/session - the document becomes unlocked.

 Word Doc.docx (12 KB)
 

 Add tag
 

FYI: the most common issue is users not closing their browsers/sessions.

Related Content

- [Getting started with documents](#)
- [Document management](#)
- [Direct "View/Edit" for Documents via Microsoft Office Desktop](#)
- [Document Version Control](#)
- [Adding or Editing a Document](#)