

Document Editing Quick Guide

Steps to open, edit, review, and submit a governance document for approval in SOPHIA.

SECTION 1

Opening a Document

- 1 Open SOPHIA and select Login with Microsoft — single sign-on (SSO) with your usual health service account. No separate SOPHIA username or password needed.
- 2 Navigate to **Manage Content > Governance Documents**. Use the search bar or filters to find the document you need.
- 3 Click the three-dot menu (...) to the right of the document row and select **Edit**.
- 4 Review content on the **Set up** tab. Then click the **Edit Document** tab at the top of the screen to open the document editor.



SECTION 2

Basic Editing

NOTE

All changes are tracked automatically — every edit is recorded with your name. You do not need to turn this on. Once you are happy with the changes, click **Save** at the top.

Home tab — everyday formatting tools



Aa

Font & Size

Change typeface and text size.

B

Bold / Italic / Underline

Apply text formatting.



Highlight

Colour behind selected text.

A

Text Colour

Change colour of selected text.

•

Bullet List

Create an unordered list.

1.

Numbered List

Create a numbered list.

≡

Alignment

Left, centre, right or justify.

H1

Styles

Apply Heading or body styles.

↶ ↷

Undo / Redo

Arrows at top-left of toolbar.

TIP

Use the Heading styles (right side of the Home toolbar) for all section titles — this keeps formatting consistent across the document.

Insert tab — tables, images and links

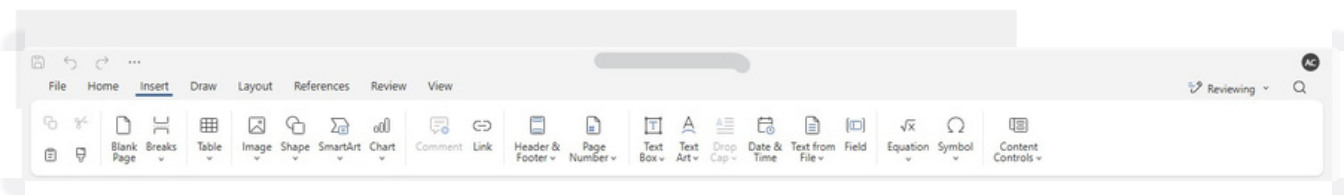
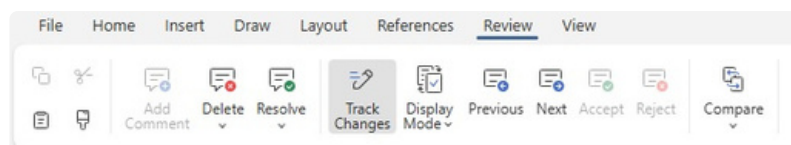


 Table Insert rows and columns.	 Image Insert a picture from your device.	 Comment Add a note to selected text.
 Link Insert a hyperlink.	 Header Edit repeated page header.	 Page Number Insert automatic page numbers.

SECTION 3

Comments & Track Changes

The Review tab is where you manage comments and tracked changes made by you and your reviewers.



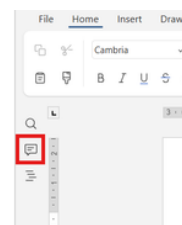
 Add Comment Attach a note to selected text.	 Delete / Resolve Remove or close a comment.	 Track Changes Track changes are always on.
 Display Mode Show or hide tracked changes — use Final view to preview the new version.	 Previous / Next Navigate between changes.	

How to add a comment

- Select the text you want to comment on.
- Click the **Review** tab, then **Add Comment** (or use the comment icon on the sidebar).
- Type your comment in the panel on the right and click **Add**.

Reviewing tracked changes

- Go to the **Review** tab and use **Previous / Next** to move between changes.
- Use **Display Mode** to switch between viewing all markup and the clean document.
- Changes are accepted / rejected during the approval process.



Sharing for Review & Sending for Approval

Sharing with reviewers

When your draft is ready, click **Share to Edit** above the toolbar and send the link to your reviewers via email. Ask them to make edits directly in the document (changes will be tracked) or leave a comment describing any proposed amendments.

Finalising and submitting for approval

1

Review all comments and tracked changes and resolve each comment once addressed.

2

Set approvers and compliance approvers in **“Approval”** tab.

3

Click **Send for Approval**. The designated approvers will be notified within SOPHIA. Documents go through two stages: Compliance Review, followed by Final Approval before publication.

4

Once all approvers have signed off, the document is published automatically and becomes available to staff. If rejected at either stage, the document returns to Draft, the author is notified by email with comments, and must make the required changes before resubmitting.