Microsoft SharePoint 2010

5 – Managing documents

CORPORATE LEARNING & DEVELOPMENT

MANAGING DOCUMENTS

Content managers or authors are responsible for getting information into SharePoint and then working with it. In this chapter you'll learn how to upload files into document libraries, create new documents from within SharePoint, edit documents, delete documents, and more.

In this booklet you will be shown how to:

- ✓ upload files into **SharePoint**
- ✓ upload multiple files simultaneously
- ✓ upload files from an **Office** application
- ✓ upload files using the **Web Folders** interface
- ✓ understand co-authoring **Word** documents
- ✓ compare versions of a **Word** document
- ✓ create a new folder in a document library
- ✓ use **SharePoint Workspace**

UPLOADING A FILE

There are three main methods for uploading files into document libraries. In this example we show how to upload a file into the **Shared Documents** library from within SharePoint. Using either the **Upload** **Document** tool on the **Documents** tab or the **Add document** link in the library, you can browse to the file. This method is ideal for uploading any file types, including non-Office files such as PDFs.

Example:

1 We clicked on **Shared Documents** to open this library

**2** Then we clicked on the **Add document** link in the library to open the **Upload Document** dialog box

Note that the blue Upload Multiple Files link only appears in this dialog box if you're using Internet Explorer…

3 Then clicked on **[Browse]** to open the **Choose File to Upload** dialog box, and navigated to the course files folder

4 Next we clicked on **Environmental Health and Safety Policy**, clicked on **[Open]**, then clicked on **[OK]** to upload the file

Depending on how your library is set up, you may be prompted to check the file's properties. Properties with a red asterisk are mandatory…

5 If prompted, check the properties (note that the Info bar says that you have to *check in* the file to make it accessible to others) and click on **[Save]** to automatically check in the uploaded file
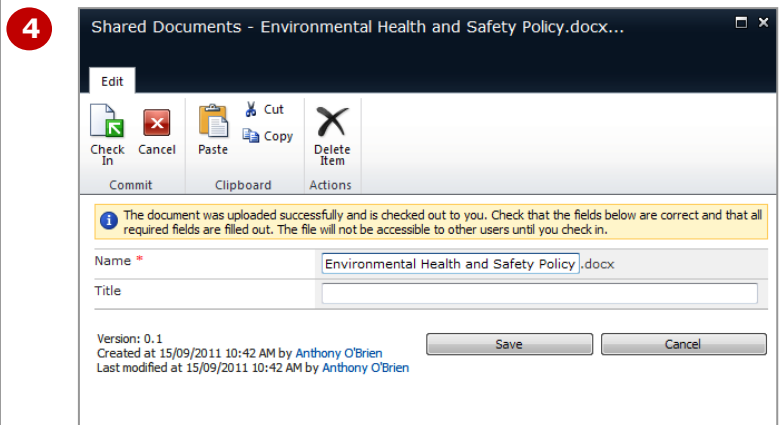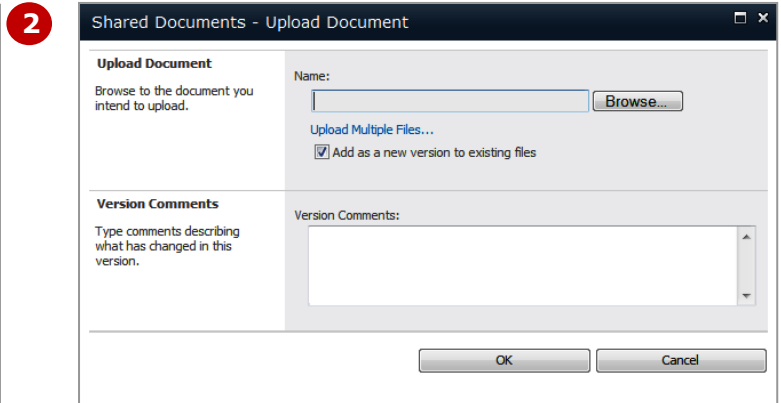
For Your Reference…

To **upload files** into **SharePoint**:

1. Open the document library in SharePoint, then open the folder (if necessary)
2. Click on **Add document**
3. Click on **[Browse]** then navigate to the folder
4. Click on the file then click on **[Open]**

Handy to Know…

* You need to use a slightly different method for uploading pictures into a Picture library as Picture libraries don't have the ribbon. Instead, click on **Upload** in the toolbar at the top of the library and select **Upload Picture**. This opens the same dialog box as described above.
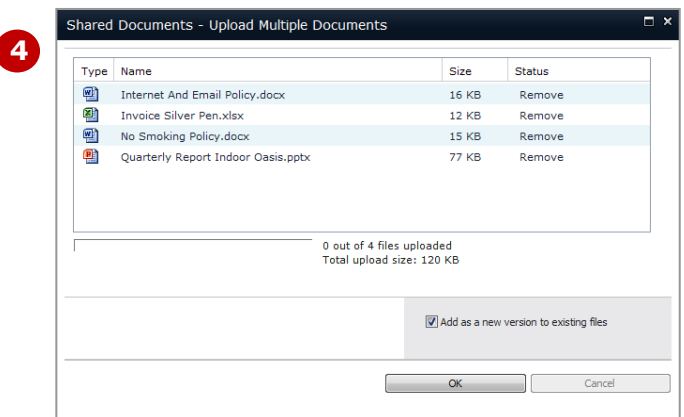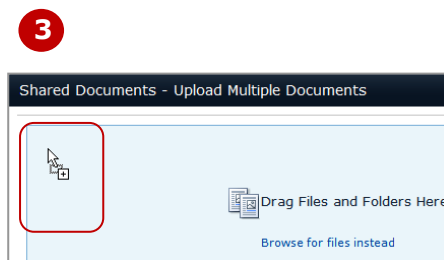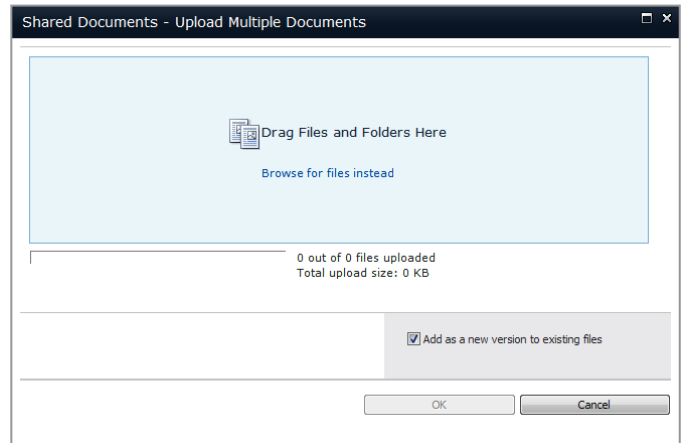
UPLOADING MULTIPLE FILES

You can upload multiple files simultaneously if you are using Internet Explorer and if you have the appropriate Microsoft Office components installed on your computer. To check whether or not you're able to perform this function, click on the bottom half of **Upload Document** on the ribbon – if **Upload Multiple Documents** is unavailable, you will need to upload them individually.

Example:

1 We clicked on the **Documents** tab in the **Shared Documents** library

2 Then clicked on the bottom of **Upload Document** in the **New** group to display a drop-down menu

3 Next we clicked on **Upload Multiple Documents** (if available) to open the **Upload Multiple Documents** dialog box

You can either drag and drop or browse for the files…

4 Then we opened **Windows Explorer** in a small window, navigated to the course files folder, selected the four files (**Internet And Email Policy**, **Invoice Silver Pen**, **No Smoking Policy** and **Quarterly Report Indoor Oasis**), dragged them into the blue box as shown, then release the mouse button to add the files

5 Next we closed Explorer, then clicked on **[OK]** and on **[Done]** to upload the files

Files uploaded like this are not automatically checked in…

6 Finally we selected the four new files by clicking on their check boxes, then clicked on **Check In** in the **Open & Check Out** group, then clicked on **[OK]** to check them in as **minor versions**

For Your Reference...

To **upload multiple files**:

1. Open the document library
2. Click on the bottom of **Upload Document** in the **New** group on the **Documents** tab and select **Upload Multiple Documents**
3. Open Windows Explorer, drag and drop the files and click on **[OK]**

Handy to Know...

- You can upload multiple documents from the **Upload Document** dialog box. To do this, click on **Add document** in the library then click on the **Upload Multiple Files** link in the **Upload Document** dialog box. The **Upload Multiple Files** link will only appear if you are able to upload multiple documents.
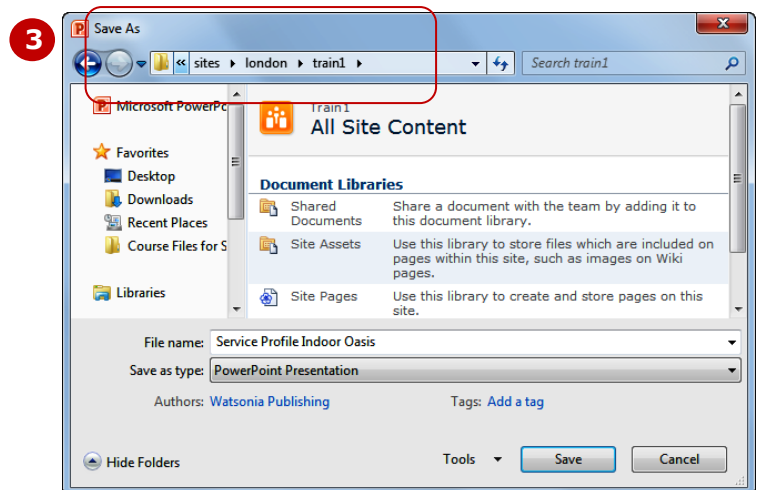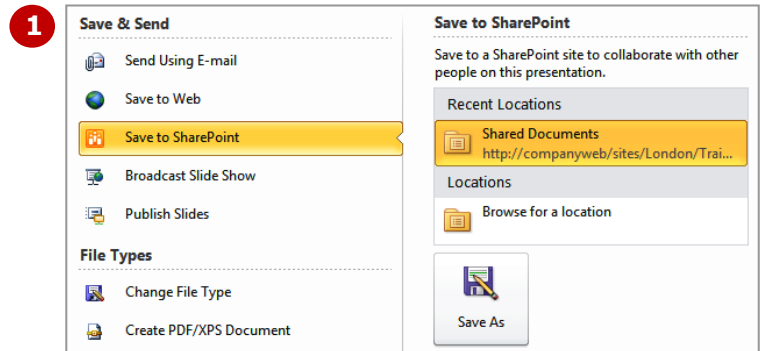
UPLOADING A FILE FROM AN OFFICE APPLICATION

SharePoint 2010 and Office 2010 applications are closely integrated. And one of the ways that they work together is that you can open a file in an Office application, such as a document in Word or a presentation in PowerPoint (which we show in this example) and save the file into a SharePoint document library directly from the Backstage of the Office application.

Example:

1 We clicked on the *File* tab, clicked on *Save & Send* and then clicked on *Save to SharePoint*

2 Then we double-clicked on *Browse for a location* under *Locations* to open the *Save As* dialog box

3 Next we selected the path in the path box at the top left of the dialog box, then typed the path to the site and pressed Enter

E.g. our path to the All Site Content page is http://company web/sites/london/train1…

4 We double-clicked on *Shared Documents* under *Document Libraries*, then clicked on **[Save]** to upload the file into SharePoint

The Info Bar in PowerPoint will change to let you check in the file…

5 Next we clicked on **[Check In]** in the Info Bar, clicked on *1.0 Major version*, and then clicked on **[OK]** to check in the file

6 Finally we closed PowerPoint, then pressed F5 and clicked on **[Retry]** (if prompted) to refresh the *Shared Documents* library

1

Save & Send

- Send Using E-mail
- Save to Web
- **Save to SharePoint**
- Broadcast Slide Show
- Publish Slides

File Types
- Change File Type
- Create PDF/XPS Document

Save to SharePoint

Save to a SharePoint site to collaborate with other people on this presentation.

Recent Locations
- Shared Documents
  http://companyweb/sites/London/Trai...

Locations
- Browse for a location

Save As

3

Save As

sites ▸ london ▸ train1 ▸   Search train1

Microsoft PowerPo...

★ Favorites
  🖥 Desktop
  📥 Downloads
  📍 Recent Places
  📁 Course Files for S

📚 Libraries

Train1
All Site Content

Document Libraries

	Shared Documents	Share a document with the team by adding it to this document library.
	Site Assets	Use this library to store files which are included on pages within this site, such as images on Wiki pages.
	Site Pages	Use this library to create and store pages on this site.

File name: Service Profile Indoor Oasis

Save as type: PowerPoint Presentation

Authors: Watsonia Publishing   Tags: Add a tag

Hide Folders   Tools ▾   Save   Cancel

☐ Type	Name	Modified	☐ Modified By
	Environmental Health and Safety Policy NEW	15/09/2011 10:53 AM	Peter Dawson
	Internet And Email Policy NEW	15/09/2011 10:58 AM	Amanda Bennett
	Invoice Silver Pen NEW	15/09/2011 10:58 AM	Amanda Bennett
	No Smoking Policy NEW	15/09/2011 10:58 AM	Amanda Bennett
	Quarterly Report Indoor Oasis NEW	15/09/2011 10:58 AM	Amanda Bennett
	Service Profile Indoor Oasis NEW	15/09/2011 11:05 AM	Peter Dawson

➕ Add document

6

For Your Reference…

To **upload files** from an *Office application*:
1. Open the file in the Office application
2. Select **File** > **Save & Send** > **Save to SharePoint**
3. Browse for a location if necessary
4. Click on **[Save As]** then click on **[Save]**

Handy to Know…

- You can store a presentation as individual slides by uploading it into a *Slide library* (if you have SharePoint Server). During the upload, you select the specific slides to publish to the library. To re-use them in a new presentation, select the desired slides and click on **[Copy Slide to Presentation]**.
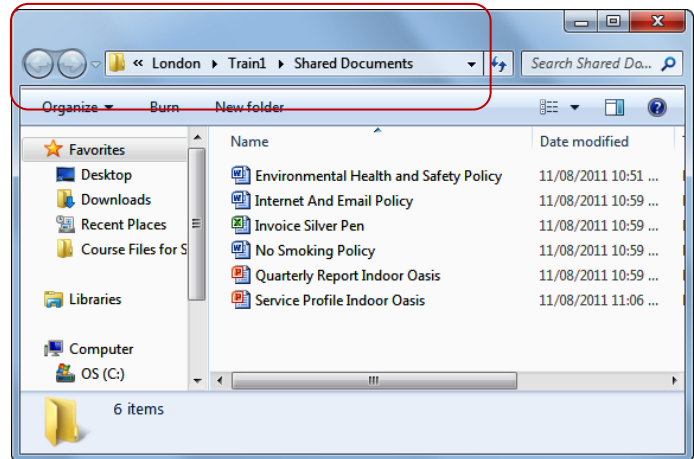
UPLOADING FILES USING WEB FOLDERS

The *web folders* interface allows you to look at your SharePoint site as though it were a series of folders on a network drive. When activated, the web folders interface opens in a *Windows Explorer* window.

Using this interface, you can quickly copy any number of files from your desktop or other folder and paste them into a document library in SharePoint.
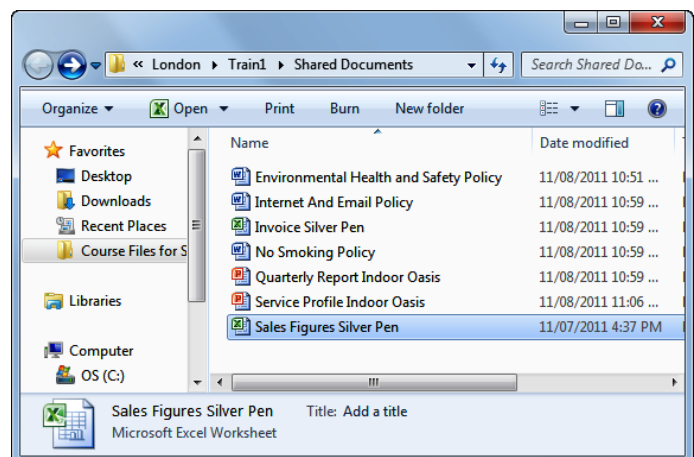
Example:

1 We ensured that the *Shared Documents* library is open, then clicked on the *Library* tab

2 We clicked on *Open with Explorer* in the *Connect & Export* group to open the *Shared Documents* library as a web folder

3 Next we navigated to the *Course Files for SharePoint 2010* folder

Let's copy a file from this folder into SharePoint…

4 We clicked on *Sales Figures Silver Pen.xlsx*, then pressed `Ctrl` + `C` to copy this file to the clipboard

5 Then clicked on *Back to Shared Documents* 🔙 in the top left corner of the web folders window and pressed `Ctrl` + `V` to paste a copy of the file into the *Shared Documents* library

6 Then closed the web folder window, then pressed `F5` and clicked on **[Retry]** (if prompted) to refresh the *Shared Documents* library

Again you will need to manually check in this file…

7 Finally we selected the new file, clicked on *Check In* in the *Open & Check Out* group, clicked on *1.0 Major version* and clicked on **[OK]**

2

5

*Tip: When files are checked out, their **Type** icon appears with a green downwards pointing arrow in the library. For example, 📄*

For Your Reference…

To *upload files* using *web folders*:

1. Open the document library
2. Click on *Open with Explorer* in the *Connect & Export* group on the *Library* tab
3. Navigate to the folder and copy the files
4. Click on *Back* 🔙 and press `Ctrl` + `V`

Handy to Know…

- Uploading files using this method doesn't let you update the files' properties. Instead, you will need to edit their properties if necessary (see *Editing A List Item* later in this chapter).

- You can also use the *web folders* interface to delete files and folders as needed. To do this, select them and press `Del`.

CO-AUTHORING WORD DOCUMENTS

New to SharePoint 2010, multiple people can edit the one document in Word at the same time. If someone else is editing the file that you open, a message will display telling you who is editing it and the paragraph that the other person is working on will be highlighted. You cannot edit the highlighted paragraph until the document is saved and uploaded to the server.

Let's assume another user has already selected the **Internet And Email Policy** in the **Shared Documents** library and has clicked on **Edit Document** on the **Documents** tab to edit it in Microsoft Word. If you were to then select the same document and choose to edit it in Word, the following message and details would appear, as shown below to the right.

The number of users currently working on the document is displayed in a tool with a number (**2** in our case) in the status bar, and clicking on this tool will display the names of the users working on the document, as shown below.
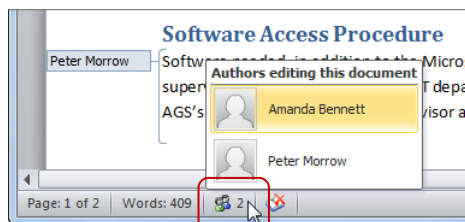
The area in the document that is currently being worked on by another user is highlighted with a blue vertical line. The user's name is also linked to this line. You can edit all areas of the document except for the areas being worked on by other users.

For example, here to the right we have attempted to delete the word **department** in the paragraph currently being edited by Peter Morrow. Word hasn't allowed our edit as you can see by the message in the status bar.

It's important to note that when multiple users are working on the same document that you are, make sure you save your document regularly as this will refresh your document from the server, highlighting any changes made by the other user.

If you want to contact one of the other users currently working on the document, hover over the name to the left of a highlighted paragraph and select the appropriate contact icon from the box with their name and email address details, such as **Send an e-mail message**. Alternatively, you can click on **[Send a Message]** from the **Info** tab of the backstage.

Note: Co-authoring will not work if the document library is set to require check-out but it will work if versioning is turned on.
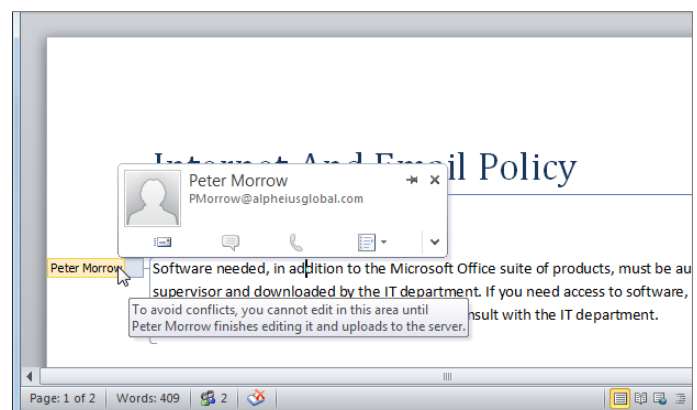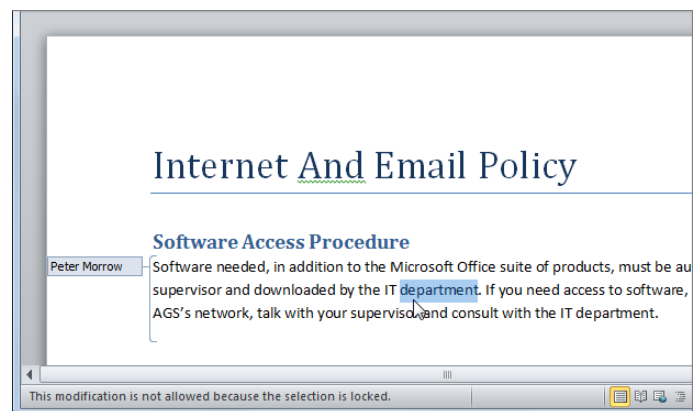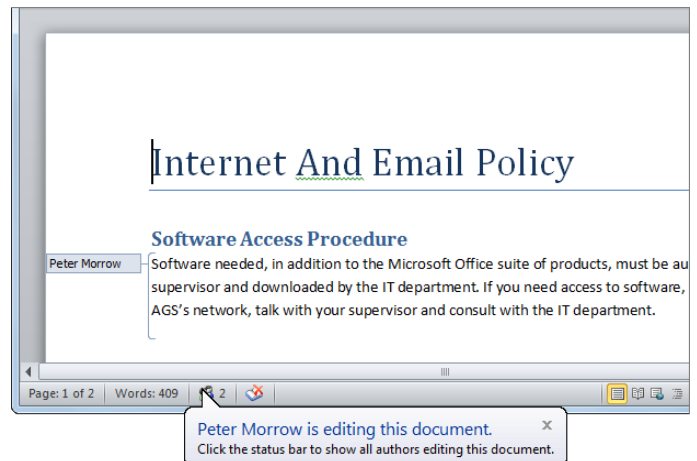

COMPARING VERSIONS

SharePoint displays the version history of a selected document, as you've seen earlier in this course, but it doesn't allow you to see what the actual differences between the versions are. But there's a workaround with Word documents. By opening a Word document from SharePoint, you can use Word's *Compare* feature to see the differences between various versions of the file.

Example:

1 We opened the *Shared Documents* library, then clicked on the *No Smoking Policy* Name link

2 Then we clicked on *Check Out and Edit*, then clicked on **[OK]** to open the file in Word

3 We clicked on the *Review* tab, then clicked on *Compare* to display a drop-down menu

Let's compare this file (version 1.1) with the last published (or major) version (1.0)…

4 Next we selected **Major Version**

5 Finally we closed the new document without saving it, then clicked on the *File* tab and clicked on **[Discard Check Out]** and then clicked on **[Yes]** to discard the check out.
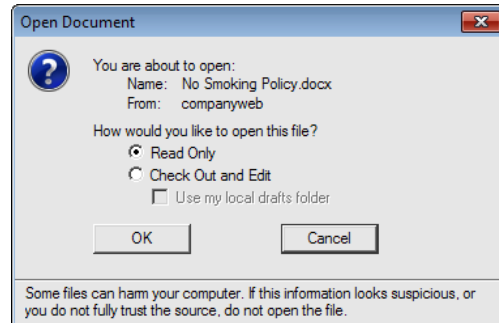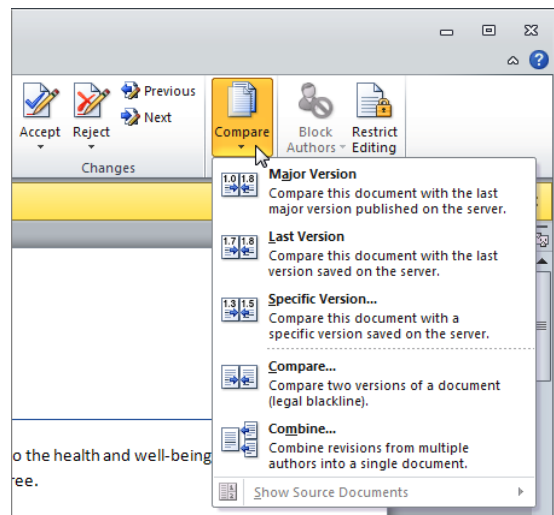
For Your Reference…

To *compare versions* of a *document*:

1. Open the library, then click on the Name of the file
2. Click on *Check Out and Edit*, then click on **[OK]**
3. Click on *Compare* on the *Review* tab, then select the desired option

Handy to Know…

- While editing a Word document, you can compare it with the latest version of the file that is saved on the SharePoint server. To do this, click on *Compare* and select **Last Version**. From this menu you can also combine the edits from different authors into the one version by selecting **Combine**.
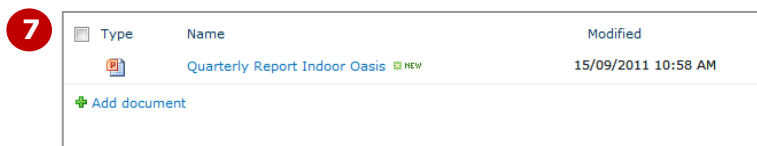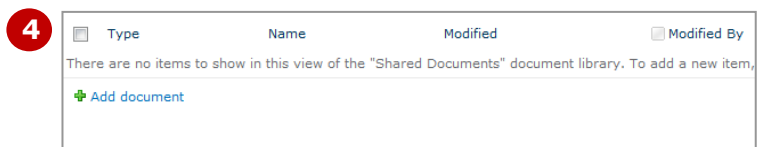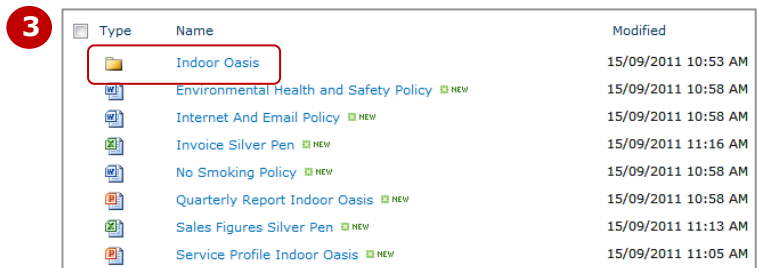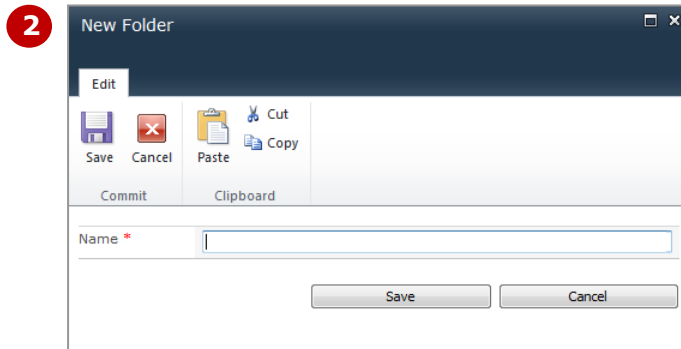
CREATING A NEW FOLDER IN A DOCUMENT LIBRARY

Thus far, we have shown how to work with files at the root-level of the **Shared Documents** library. But in the real world, document libraries are likely to store huge numbers of files. To help organise a

document library and its content, you can create folders and open them prior to uploading files. You can also create folders within folders as necessary.

Example:

1 We opened the **Shared Documents** library, then clicked on the **Documents** tab

2 We then clicked on **New Folder** in the **New** group to open the **New Folder** dialog box

3 Next we typed **Indoor Oasis** in **Name**, then clicked on **[Save]** to add the folder

4 Then clicked on **Indoor Oasis** to open the **Indoor Oasis** folder

Let's upload some content…

5 We clicked on the top half of **Upload Document** to open the **Upload Documents** dialog box

6 Then clicked on **[Browse]**, navigated to the course files folder, clicked on **Quarterly Report Indoor Oasis**, clicked on **[Open]**, then clicked on **[OK]**

7 Next we clicked on **Check In** to upload the file

2

New Folder

Edit

Save	Cancel	Paste	✂ Cut ⧉ Copy
Commit		Clipboard	

Name * [   ]

Save   Cancel

3

☐ Type	Name	Modified
📁	Indoor Oasis	15/09/2011 10:53 AM
📄	Environmental Health and Safety Policy ⊞ NEW	15/09/2011 10:58 AM
📄	Internet And Email Policy ⊞ NEW	15/09/2011 10:58 AM
📄	Invoice Silver Pen ⊞ NEW	15/09/2011 11:16 AM
📄	No Smoking Policy ⊞ NEW	15/09/2011 10:58 AM
📄	Quarterly Report Indoor Oasis ⊞ NEW	15/09/2011 10:58 AM
📄	Sales Figures Silver Pen ⊞ NEW	15/09/2011 11:13 AM
📄	Service Profile Indoor Oasis ⊞ NEW	15/09/2011 11:05 AM

4

☐ Type	Name	Modified	☐ Modified By

There are no items to show in this view of the "Shared Documents" document library. To add a new item,

➕ Add document

7

☐ Type	Name	Modified
📄	Quarterly Report Indoor Oasis ⊞ NEW	15/09/2011 10:58 AM

➕ Add document

For Your Reference…

To **create** a **new folder** in a **document library**:

1. Open the library
2. Click on **New Folder** in the **New** group on the **Documents** tab
3. Type the **Name** and click on **[Save]**

Handy to Know…

- If the document library has been configured to disallow folders from being created, the **New Folder** tool will not be available on the ribbon.
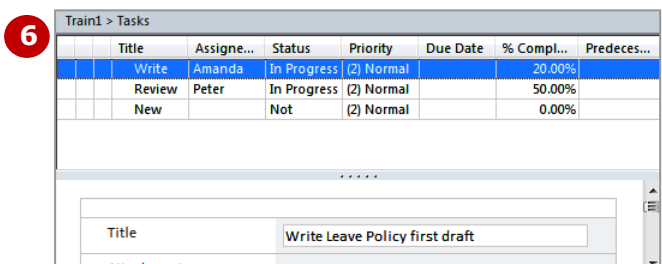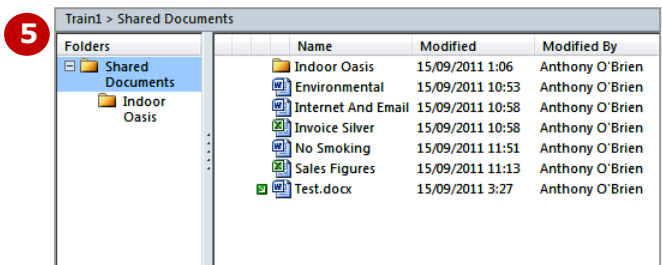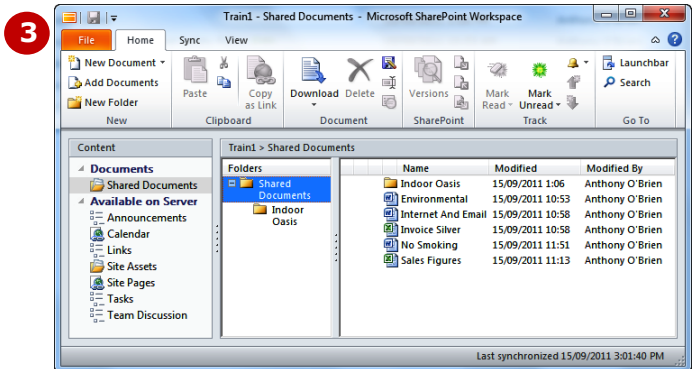
USING SHAREPOINT WORKSPACE

Using SharePoint Workspace, you can create a synchronised copy of list and library content on your computer. This means that you can access and edit files and list items anytime on your computer, even when you're disconnected from the SharePoint server. And when you're back online, SharePoint will synchronise the files – in both directions – between the server and your computer.

Example:

1 We opened *Shared Documents*, then clicked on the *Library* tab

2 Next we clicked on *Sync to SharePoint Workspace* – a message box will display

3 Then clicked on **[OK]** then on **[Open Workspace]** when *100%* appears in the green bar of the message box

The Shared Documents library will open in the right pane of the Workspace. To add a file…

4 We clicked on *New Document* to open Word, then clicked on *Save* 💾 in the Quick Access toolbar to open the *Save As* dialog box

5 Then typed **Test** in *File name*, clicked on **[Save]**, then closed Word

The items listed below Available on Server in the left pane are not synced to the workspace. To sync the Tasks list…

6 We clicked on *Tasks* in the left pane, then clicked on *Connect "Tasks" to Server* to sync the tasks

To edit a task on your computer, simply double-click on it to open it…

7 Finally we closed SharePoint Workspace to return to SharePoint – the new document will be in the *Shared Documents* library.

When you're working on SharePoint Workspace and your computer is connected to the SharePoint server, synchronisation will occur automatically at a regular interval. But to force synchronisation, click on the top half of the *Sync* tool on the *Sync* tab.

If you want to disconnect a list or library from the server, select it in the left pane and then click on *Change Sync Settings* on the *Sync* tab and click on *Disconnect from Server*.

For Your Reference…

To use *SharePoint Workspace*:

1. Open the site to be synchronised
2. Select **Site Actions** > **Sync to SharePoint Workspace**
3. Click on the desired list or library under *Available on Server*, then click on *Connect to Server*

Handy to Know…

- The first time when you use the *Sync to SharePoint Workspace* feature, you will be asked to create an account as the first step for creating a SharePoint workspace on your PC. From then on, SharePoint Workspace will use your Windows logon details so that you don't need to log on to it separately.

CONCLUDING REMARKS

Congratulations!

You have now completed the **Managing documents** booklet. This booklet was designed to get you to the point where you can competently perform a variety of operations as listed in the objectives on page 2.

We have tried to build up your skills and knowledge by showing you specific tasks. The step by step approach will serve as a reference for you when you need to repeat a task.

Where To From Here...

The following is a little advice about what to do next:

- Spend some time playing with what you have learnt. You should reinforce the skills that you have acquired and use some of the application's commands. This will test just how much of the concepts and features have stuck! Don't try a big task just yet if you can avoid it - small is a good way to start.

- Some aspects of the course may now be a little vague. Go over some of the points that you may be unclear about. Use the examples and exercises in these notes and have another go - these step-by-step notes were designed to help you in the classroom and in the work place!

Here are a few techniques and strategies that we've found handy for learning more about technology:

- visit CLD's e-learning zone on the Intranet

- read computer magazines - there are often useful articles about specific techniques

- if you have the skills and facilities, browse the Internet, specifically the technical pages of the application that you have just learnt

- take an interest in what your work colleagues have done and how they did it - we don't suggest that you plagiarise but you can certainly learn from the techniques of others

- if your software came with a manual (which is rare nowadays) spend a bit of time each day reading a few pages. Then try the techniques out straight away - over a period of time you'll learn a lot this way

- and of course, there are also more courses and booklets for you to work through

- finally, don't forget to contact CLD's IT Training Helpdesk on **01243-752100**