

SharePoint Training

Administrative Group Summit



U.S. DEPARTMENT OF
ENERGY | Legacy
Management
KNOWLEDGE CENTER

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Why SharePoint

- Version control
 - Each library can be set to keep prior versions of a file. Files with the same name will overwrite each other to ensure the most recent one is available.
 - By eliminating the practice of emailing files, you can be sure that the single version on SharePoint is the most current version without guessing.
 - Eliminate rework and save time.
- Accountability
 - Each save records who the file was last modified by.
 - Comments can be used to alert coworkers of changes and pertinent information.
- Security
 - Security groups can be created to meet group needs.
 - Each document library, calendar, and discussion group can be made accessible only to the members in the allowed groups, at the allowed level.
 - Permissions can be customized down to the file level, if needed.
- Centralized communication
 - Using discussion boards instead of email for information that needs to be dispersed to an entire team ensures that it doesn't get lost in an inbox.
 - Information remains easily accessible to all team members.

Browser Requirements

- Internet Explorer (IE)
 - IE is the only browser fully compatible with SharePoint.
 - Firefox and Chrome are incompatible. While they will allow you to view some areas seamlessly, they cannot complete all the functions available or utilized by SharePoint sites.



Terminology

- Alert
 - A notification to users that there are changes to existing information or new information in a specified location. Alerts can be set on individual files, lists, libraries, and pages.
- Discussion board
 - A central location to share information under multiple topics.
- Document library
 - A list where documents and folders are stored. The document library settings control versioning settings, workflow settings, and information policies.
- List
 - A list is a collection of information items displayed in an area or on a site. List types include: Announcements, Links, Contacts, Events, Tasks, and Issues.
- Page
 - A user-created area on a SharePoint site for displaying content.
- Public-facing site
 - A SharePoint site that is accessible by all LM and LMS employees.
- Security group
 - A collection of defined users that can be granted permission to documents, libraries, lists, and sites as a group.

Terminology

- Site
 - A complete SharePoint site stored in a named portion of the top-level site.
- Subsite
 - A named subdirectory of the top-level site that is a complete site. Each subsite can have independent administration, authoring, and browsing permissions from the top-level sites and other subsites.
- Team site
 - A SharePoint site accessible only by the team members defined in security or domain groups.
- View
 - A named collection of settings for querying and displaying items or documents in a SharePoint list or library. There are two types of views: Personal, which can be used only by the user who creates them; and Public, which can be used by all users who have access to the site.
- Web part
 - Customizable page element that can be added to SharePoint pages.
- Workflow
 - The automation of processes, where documents and tasks are passed automatically from one user to another for action, according to a set sequence.

LISTS AND LIBRARIES

Lists and Libraries

Lists

- Made up of line items
- Can hold attachments
- Created by adding information lines

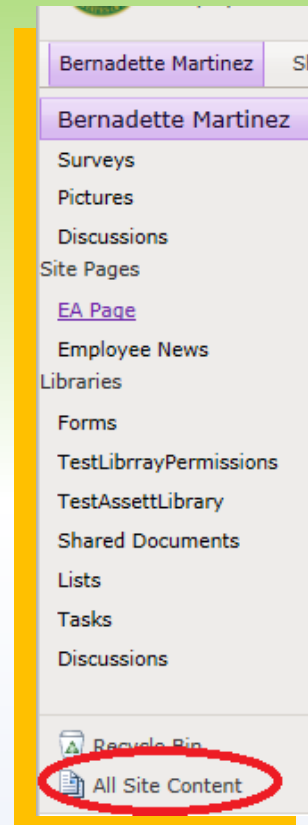
Libraries

- Made up of files including documents, spreadsheets, slide presentations, images, and more
- Created by uploading or creating a file

Creating a List or Library

To create a new list or library:

- Go to **All Site Content**, located on the bottom of the left-hand navigation menu on any page.
- Click **Create** at the top of the page.



Creating a List or Library

- Select the thing you want to create. Use the filters on the left to display fewer options.
- Give the list or library a name and click **Create**.
- **More Options** will give you the choice to add a link to the left-hand navigation menu.

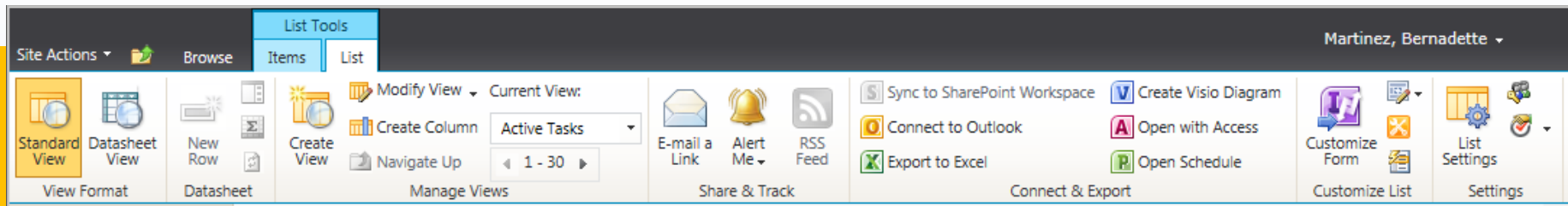
The screenshot shows the 'Create' dialog box with the following elements:

- Left Panel:** A navigation menu with 'Browse From:' set to 'Installed Items' and 'Filter By:' set to 'Library'. A red oval highlights the 'Library' section, which includes options like 'List', 'Page', 'Site', and 'All Categories'.
- Main Area:** A grid of library options: Asset Library, Data Connection Library, Document Library (highlighted with a blue border), Form Library, Picture Library, Report Library, Requisition Log, and Slide Library. A 'Wiki Page Library' option is visible at the bottom left.
- Right Panel:** A search bar for 'Installed Items' and a preview for 'Document Library'. The preview includes the text: 'Type: Library', 'Categories: Content', and 'A place for storing documents or other files that you want to share. Document libraries allow folders, versioning, and check out.' Below this is a text input field for 'Name', a 'Create' button, and a 'More Options' button, all of which are circled in red.

Adding Columns

You can add existing site columns or create custom columns for any list or library.

To add columns, navigate to the list or library and go to **List (Library Tools) > List (Library) > List (Library) Settings**.



Adding Columns

Under **Columns** select **Add from existing site columns** or **Create column** based on your needs.

Columns

A column stores information about each document in the document library. Because this document library allows multiple content types, some column settings, such as whether information is required or optional for a column, are now specified by the content type of the document. The following columns are currently available in this document library:

Column (click to edit)	Type	Used in
Author	Single line of text	New Folder Custom
Test	Choice	Document
Test 1	Yes/No	New Folder Custom
Title	Single line of text	Document, New Folder Custom
Created By	Person or Group	
Modified By	Person or Group	
Checked Out To	Person or Group	

[Create column](#)

[Add from existing site columns](#)

[Indexed columns](#)

Adding Columns

If choosing to create a column, select the options for the column.

After making the column selections, click **OK**.

Name and Type
Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- External Data
- Managed Metadata

Additional Column Settings
Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
 Yes No

Enforce unique values:
 Yes No

Maximum number of characters:

Default value:
 Text Calculated Value

Add to all content types
 Add to default view

Column Validation

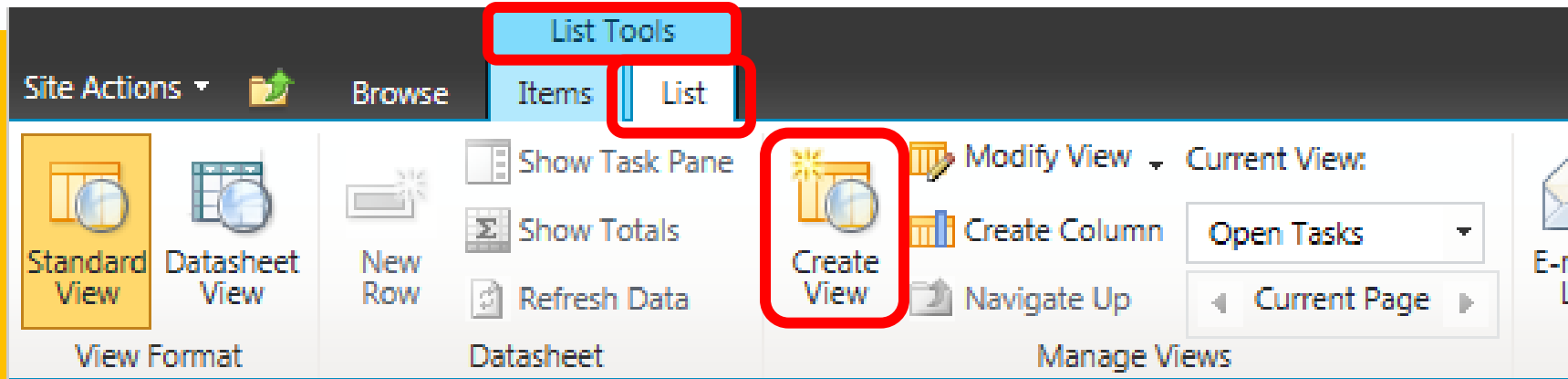
OK Cancel

Questions



Creating Views







Multiple views can be created for any list or library by going to **List (Library) Tools > List (Library) > Create View**.



Creating Views

Select one of the formats to begin from scratch or select an existing view to modify it to create a new one.

Choose a view format

 Standard View View data on a Web page. You can choose from a list of display styles.	 Datasheet View View data in an editable spreadsheet format that is convenient for bulk editing and quick customization.
 Calendar View View data as a daily, weekly, or monthly calendar.	 Gantt View View list items in a Gantt chart to see a graphical representation of how a team's tasks relate over time.
 Access View Start Microsoft Access to create forms and reports that are based on this list.	 Custom View in SharePoint Designer Start SharePoint Designer to create a new view for this list with capabilities such as conditional formatting.

Start from an existing view

- All Tasks
- My Tasks
- Due Today
- Active Tasks
- By Assigned To
- By My Groups
- Open Tasks
- Meeting Summary
- DataSheet View
- Public View
- Tasks Calendar View

Creating Views

Name the view, select the audience (public or personal), the columns to display, and sorting and grouping options.

Name

Type a name for this view of the document library. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.

View Name:

Make this the default view
(Applies to public views only)

Audience

Select the option that represents the intended audience for this view.

View Audience:

Create a Personal View
Personal views are intended for your use only.

Create a Public View
Public views can be visited by anyone using the site.

Columns

Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the **Position from left** box.


Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Type (icon linked to document)	1
<input checked="" type="checkbox"/>	Name (linked to document with edit menu)	2
<input checked="" type="checkbox"/>	Modified	3
<input checked="" type="checkbox"/>	Modified By	4
<input checked="" type="checkbox"/>	Feedback and Review	5
<input checked="" type="checkbox"/>	Test	6
<input type="checkbox"/>	Author	7
<input type="checkbox"/>	Check In Comment	8
<input type="checkbox"/>	Checked Out To	9
<input type="checkbox"/>	Content Type	10
<input type="checkbox"/>	Copy Source	11
<input type="checkbox"/>	Created	12
<input type="checkbox"/>	Created By	13
<input type="checkbox"/>	Document ID (linked to document)	14
<input type="checkbox"/>	Edit (link to edit item)	15
<input type="checkbox"/>	File Size	16
<input type="checkbox"/>	Folder Child Count	17


Sort

Select up to two columns to determine the order in which the items in the view are displayed. [Learn about sorting items.](#)

First sort by the column:


None


 Show items in ascending order
(A, B, C, or 1, 2, 3)

 Show items in descending order
(C, B, A, or 3, 2, 1)

Then sort by the column:

None


 Show items in ascending order
(A, B, C, or 1, 2, 3)


 Show items in descending order
(C, B, A, or 3, 2, 1)

Sort only by specified criteria (folders may not appear before items).

Filter

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type **[Today]** or **[Me]** as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. [Learn about filtering items.](#)

 Show all items in this view

 Show items only when the following is true:

Show the items when column

None

is equal to

And Or

When column

None

is equal to

[Show More Columns...](#)

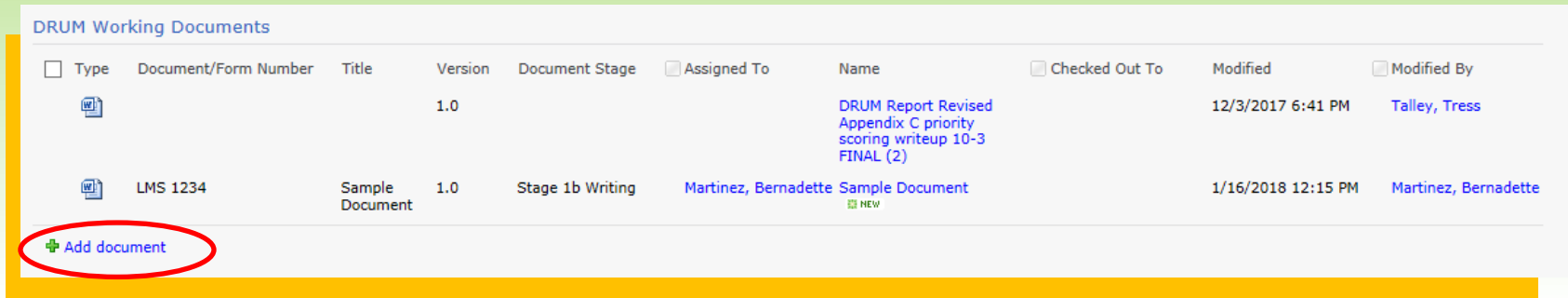
Questions



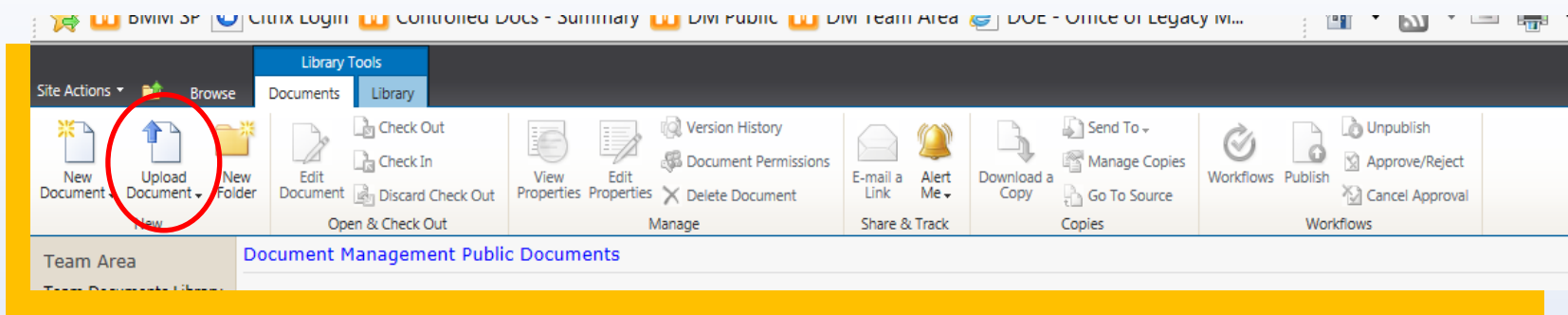
UPLOADING FILES

Uploading Files

To upload a new file, navigate to your desired library and click **Add document** in the lower left of the library.



You can also go to the ribbon and click **Upload document**.

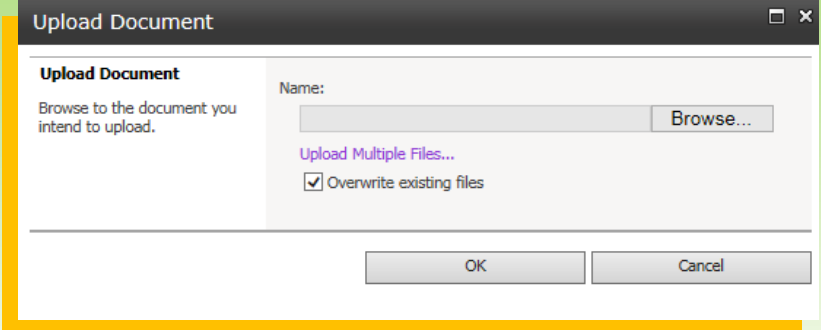


Uploading Files

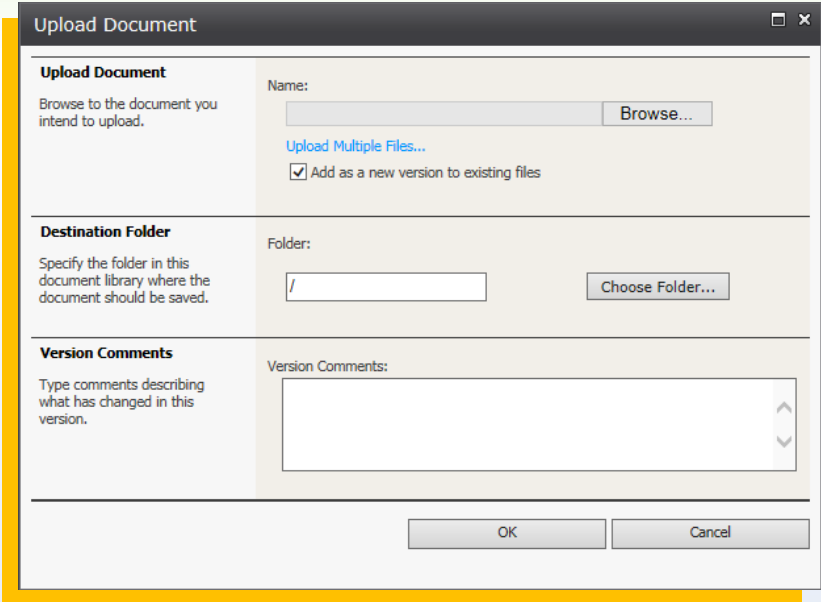
- Click **Browse** to locate a single file for upload.
- Select the folder, if necessary, by clicking **Choose Folder...** (this will populate automatically if you are in a folder already).

Note: SharePoint's filtering and view options make folders unnecessary in many cases.

- Network folder file names are limited to 250 characters including the entire file path, so names should be concise and abbreviated where possible.
- Click **OK** to upload the file.



The screenshot shows the 'Upload Document' dialog box. It has a title bar with 'Upload Document' and window control buttons. The main area is divided into two sections. The top section is titled 'Upload Document' and contains the text 'Browse to the document you intend to upload.' followed by a text input field for the file name and a 'Browse...' button. Below this is a link for 'Upload Multiple Files...' and a checked checkbox for 'Overwrite existing files'. The bottom section contains 'OK' and 'Cancel' buttons.



The screenshot shows the 'Upload Document' dialog box with more options. It has a title bar with 'Upload Document' and window control buttons. The main area is divided into three sections. The top section is titled 'Upload Document' and contains the text 'Browse to the document you intend to upload.' followed by a text input field for the file name and a 'Browse...' button. Below this is a link for 'Upload Multiple Files...' and a checked checkbox for 'Add as a new version to existing files'. The middle section is titled 'Destination Folder' and contains the text 'Specify the folder in this document library where the document should be saved.' followed by a text input field for the folder path (containing '/') and a 'Choose Folder...' button. The bottom section is titled 'Version Comments' and contains the text 'Type comments describing what has changed in this version.' followed by a large text area with scrollbars. The bottom of the dialog contains 'OK' and 'Cancel' buttons.

Uploading Files

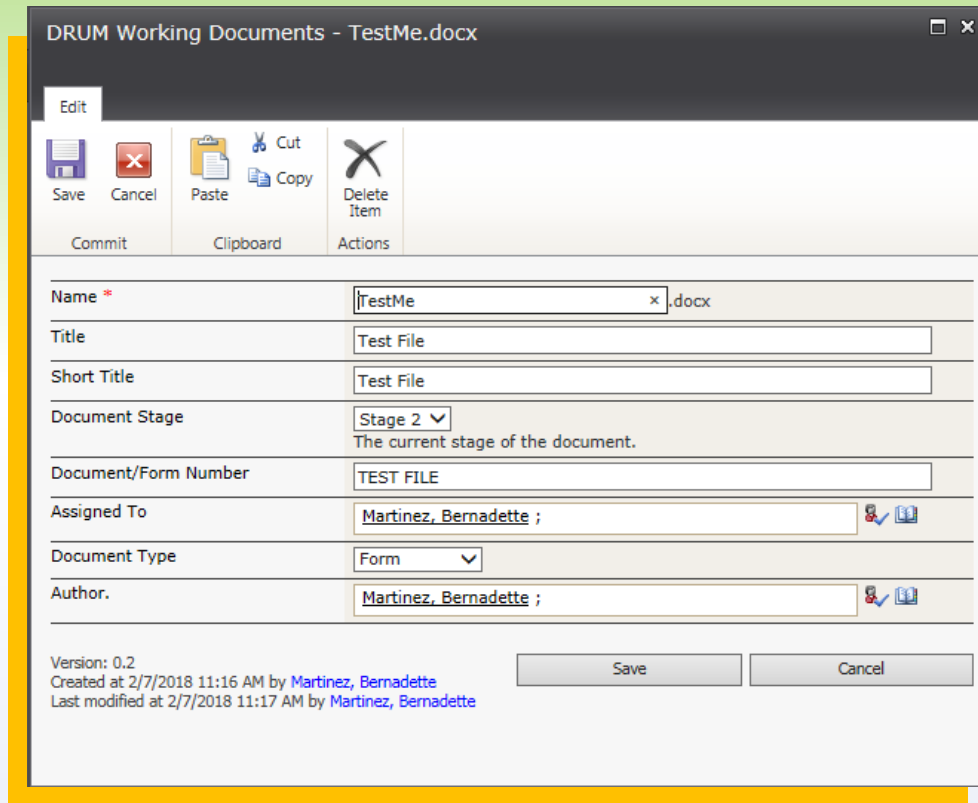
When your file has uploaded, the document properties window will appear.

The **Name** field is the file name of the uploaded file.

If there is metadata in the file, it will populate the **Title** field.

Enter any other information that has been set up in the appropriate areas and click **OK**.

Your screen will reload and you will see the file in the library.



The screenshot shows a window titled "DRUM Working Documents - TestMe.docx". The window has a menu bar with "Edit" and a toolbar with icons for Save, Cancel, Paste, Cut, Copy, and Delete Item. Below the toolbar are three tabs: "Commit", "Clipboard", and "Actions". The main area contains a form with the following fields:

- Name: TestMe.docx
- Title: Test File
- Short Title: Test File
- Document Stage: Stage 2 (dropdown menu)
- Document/Form Number: TEST FILE
- Assigned To: Martinez, Bernadette ;
- Document Type: Form (dropdown menu)
- Author: Martinez, Bernadette ;

At the bottom of the form, there is a "Version: 0.2" label and two buttons: "Save" and "Cancel". Below the buttons, there is a small text area with the following information:

Created at 2/7/2018 11:16 AM by Martinez, Bernadette
Last modified at 2/7/2018 11:17 AM by Martinez, Bernadette

Uploading Files

Note:

Some fields, like the **Assigned To** field, can be created as lookup fields. Type the name as last name, first name and hit enter. If there are any spelling errors, it will not save. Click the book icon to search for names. Select the appropriate name from the list and click **OK**.

DRUM Working Documents - TestMe.docx

Edit

Save Cancel Paste Copy Delete Item

Commit Clipboard Actions

Name * TestMe .docx

Title Test File

Short Title Test File

Document Stage Stage 2
The current stage of the document.

Document/Form Number TEST FILE

Assigned To Martinez, Bernadette ;

Document Type Form

Author. Martinez, Bernadette ;

Version: 0.2
Created at 2/7/2018 11:16 AM by Martinez, Bernadette
Last modified at 2/7/2018 11:17 AM by Martinez, Bernadette

Save Cancel

Select People and Groups -- Webpage Dialog

Find martinez

Display Name	Title	Department
Bernadette Martinez Members		
Bernadette Martinez Members II		
Bernadette Martinez Owners		
Bernadette Martinez Visitors		
Martinez, Anthony (CONTR)		
Martinez, Ben (CONTR)		Environmental Safety Health
Martinez, Bernadette	Document Formatting Specialist	Business Services
Martinez, Gina (CONTR)		
Martinez, Margie (CONTR)		Environmental Safety Health

OK Cancel

Questions



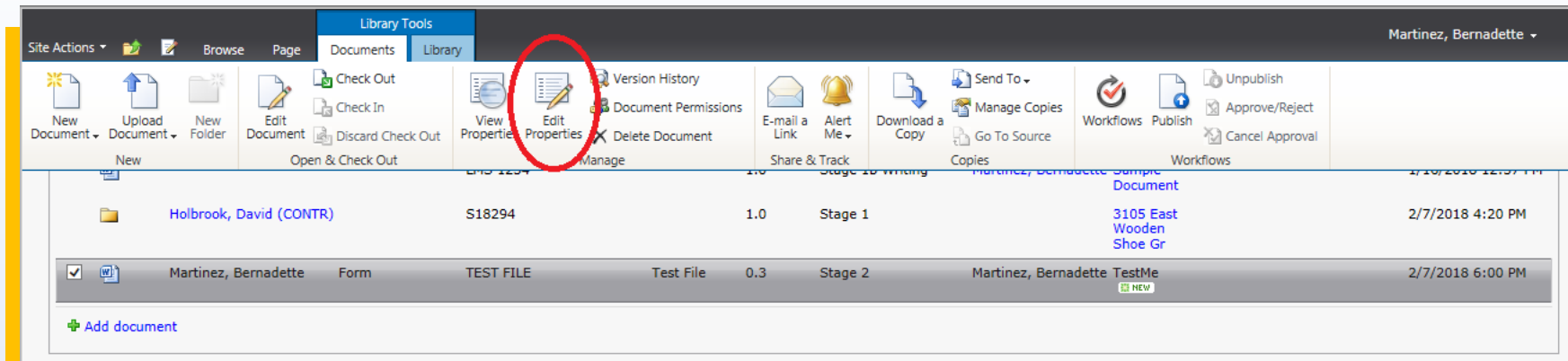
UPDATING LIST/LIBRARY COLUMNS

Updating List/Library Columns

When you update the properties of a document or folder, you will be prompted to check out the item. There are two methods to do so.

Method 1

- Check the box in front of the document.
- Click **Edit Properties** on the **Library Tools > Documents** ribbon.



The screenshot shows the SharePoint Library ribbon with the 'Library Tools' tab selected. The 'Documents' group is active, and the 'Edit Properties' button is circled in red. Below the ribbon, a table of documents is visible, with the 'Martinez, Bernadette' document selected (checkbox checked).

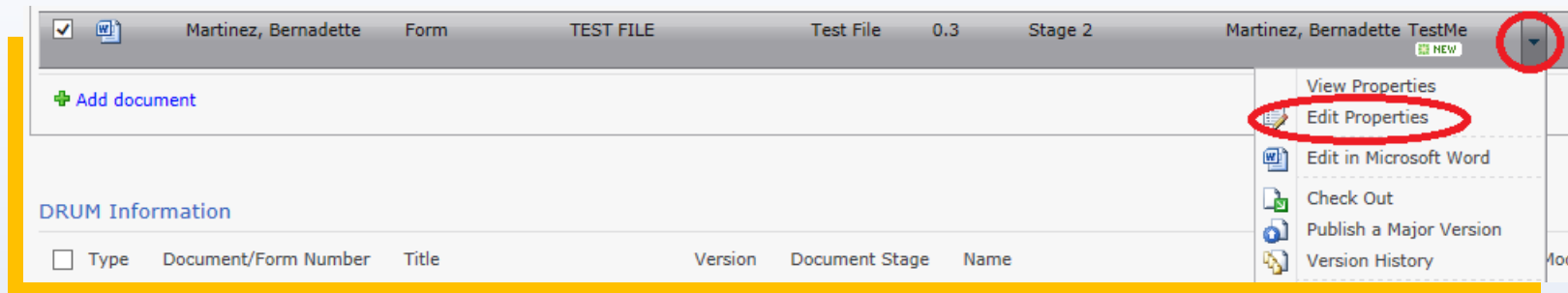
Document	Version	Stage	Author	Created				
Holbrook, David (CONTR)	S18294	1.0	Stage 1	2/7/2018 4:20 PM				
<input checked="" type="checkbox"/> Martinez, Bernadette	Form	TEST FILE	Test File	0.3	Stage 2	Martinez, Bernadette	TestMe	2/7/2018 6:00 PM

Updating List/Library Columns

When you update the properties of a document or folder, you will be prompted to check out the item. There are two methods to do so.

Method 2

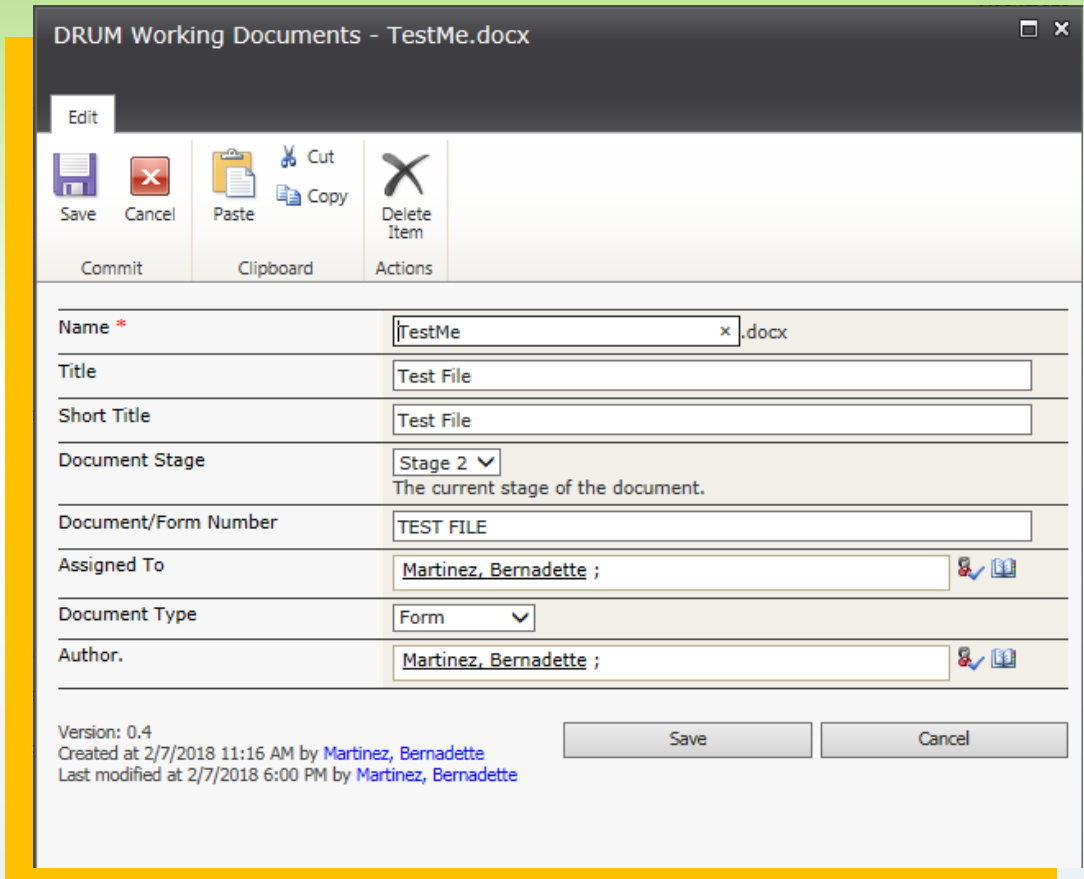
- Click the dropdown arrow next to the file name.
- Click **Edit Properties** in the drop down menu.



Updating List/Library Columns

From this screen you can update all the properties of the document. Make the necessary updates and click **Save**.

This does not check in the file. Until the file is checked in, updates will not be visible to anyone else.



The screenshot shows a software window titled "DRUM Working Documents - TestMe.docx". The window has a menu bar with "Edit" and a toolbar with icons for Save, Cancel, Paste, Copy, and Delete Item. Below the toolbar are three sections: "Commit", "Clipboard", and "Actions". The main area contains a form with the following fields:

Name *	TestMe .docx
Title	Test File
Short Title	Test File
Document Stage	Stage 2 <small>The current stage of the document.</small>
Document/Form Number	TEST FILE
Assigned To	Martinez, Bernadette ;
Document Type	Form
Author.	Martinez, Bernadette ;

At the bottom left, there is version and creation information: "Version: 0.4", "Created at 2/7/2018 11:16 AM by Martinez, Bernadette", and "Last modified at 2/7/2018 6:00 PM by Martinez, Bernadette". At the bottom right, there are "Save" and "Cancel" buttons.

Questions



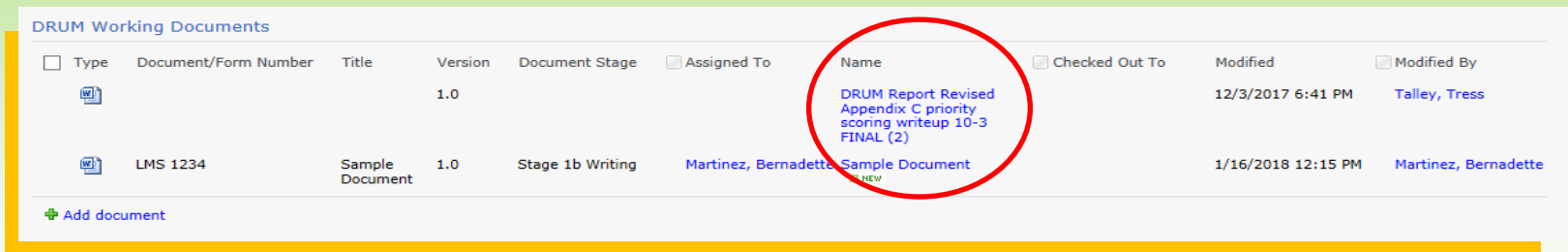
UPDATING FILES

Updating Files

- You **must** use the Internet Explorer browser to utilize SharePoint pages. Firefox and Chrome are not compatible with SharePoint functions. If you encounter anything strange, especially forced downloads of files when you attempt to open them, check your browser first.
- SharePoint will time out after 30 minutes of inactivity. Best practice is to save your work often, just as you would with offline files. If you have a document open and need to leave your desk for any reason, save the file first. This will ensure all your work is saved and none of your changes are lost.
- If SharePoint is being used to maintain version control, all documents should be worked on SharePoint exclusively. In this case, do not download documents from SharePoint to work on them. All files must be opened, worked on, and saved in SharePoint, not on your hard drive. In order to maintain version control, it is imperative that only one copy of the file be used.

Opening Files

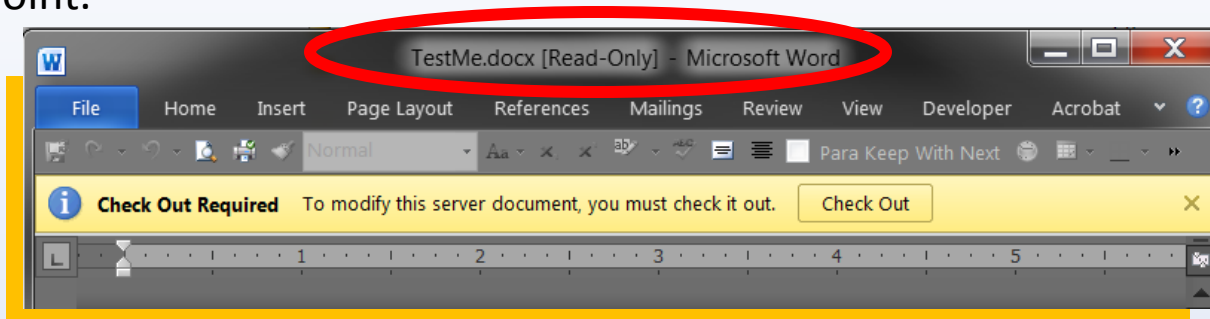
To open a file, click on the file name in the library you are working in (shared documents, team information, etc.). File names will always display as blue hyperlinks. The file will open in the appropriate Microsoft Office program.



<input type="checkbox"/>	Type	Document/Form Number	Title	Version	Document Stage	<input type="checkbox"/>	Assigned To	Name	<input type="checkbox"/>	Checked Out To	Modified	<input type="checkbox"/>	Modified By
<input type="checkbox"/>				1.0				DRUM Report Revised Appendix C priority scoring writeup 10-3 FINAL (2)			12/3/2017 6:41 PM		Talley, Tress
<input type="checkbox"/>		LMS 1234	Sample Document	1.0	Stage 1b Writing		Martinez, Bernadette	Sample Document			1/16/2018 12:15 PM		Martinez, Bernadette

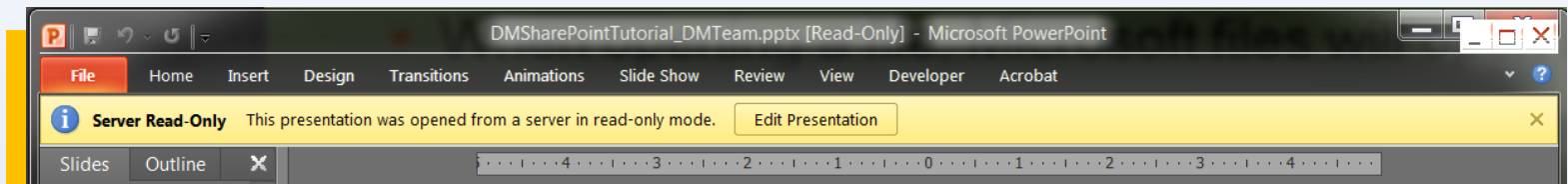
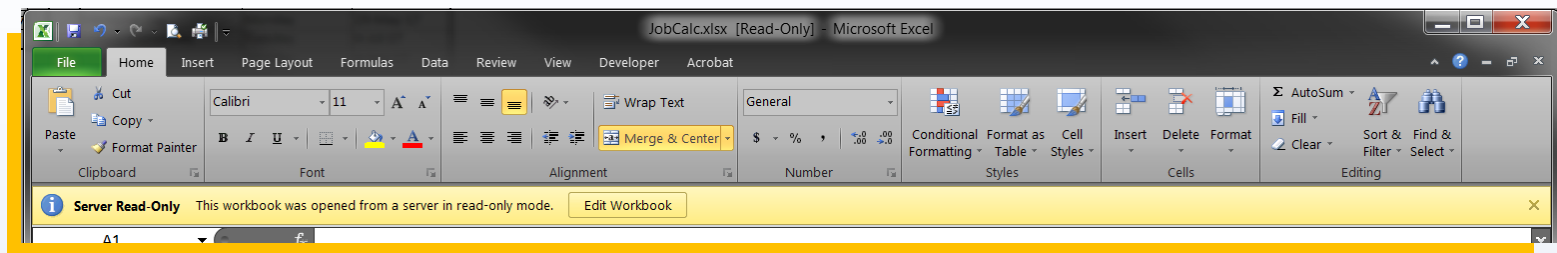
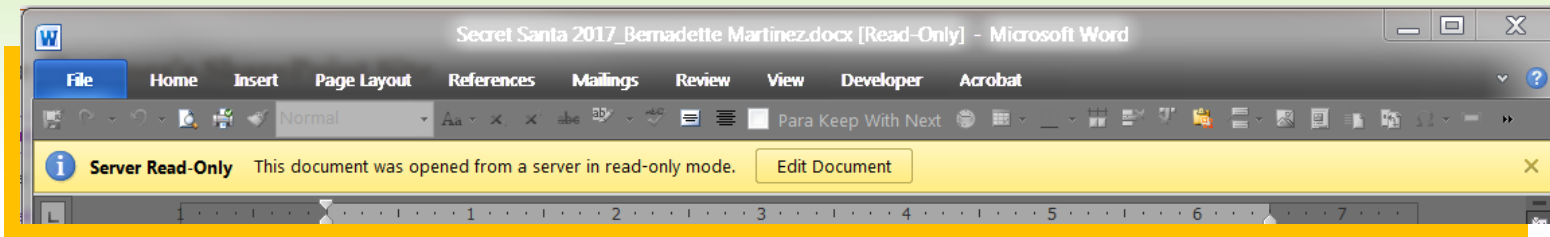
[+ Add document](#)

Click the file name **only once**. *Be patient*. If multiple copies open, you may inadvertently start working on a read-only copy and you will not be able to save your work. If multiple copies open, ensure the one you ultimately work on does not have **[Read-Only]** in the heading. If it does, close it and reopen the file from SharePoint.



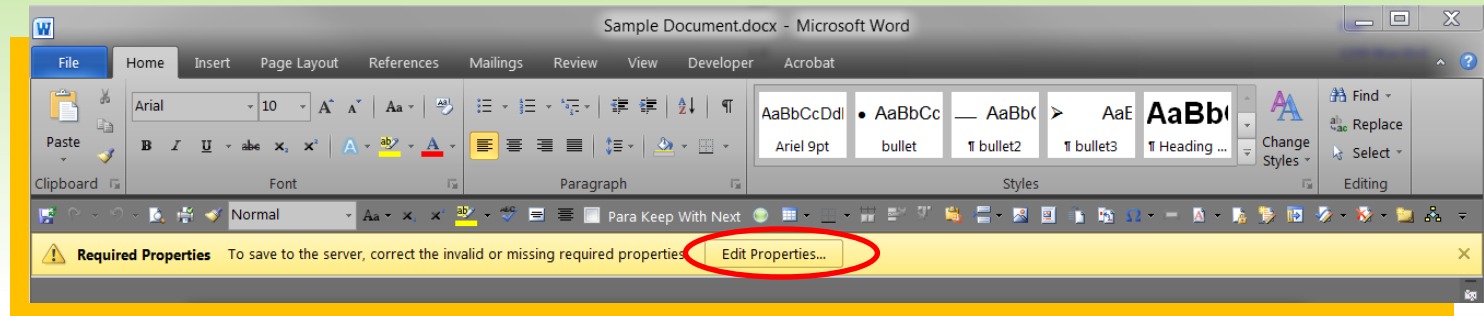
Editing Files

- When opening a file, Microsoft files will open in read-only mode.
- Click **Edit Document** in the yellow information ribbon across the top of the file.
- The file will reload and you will be able to edit it normally.

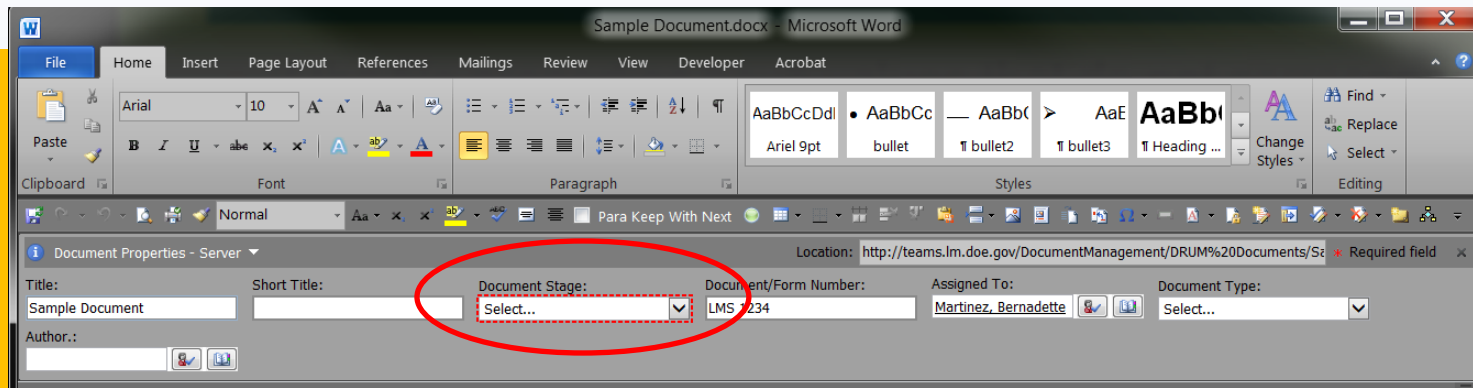


Updating File Properties in Word

If the file properties have values that do not correspond to the current options in SharePoint (for example, if choices were updated), you will see a yellow ribbon prompting for changes. Click **Edit Properties** to display the properties panel in the document.

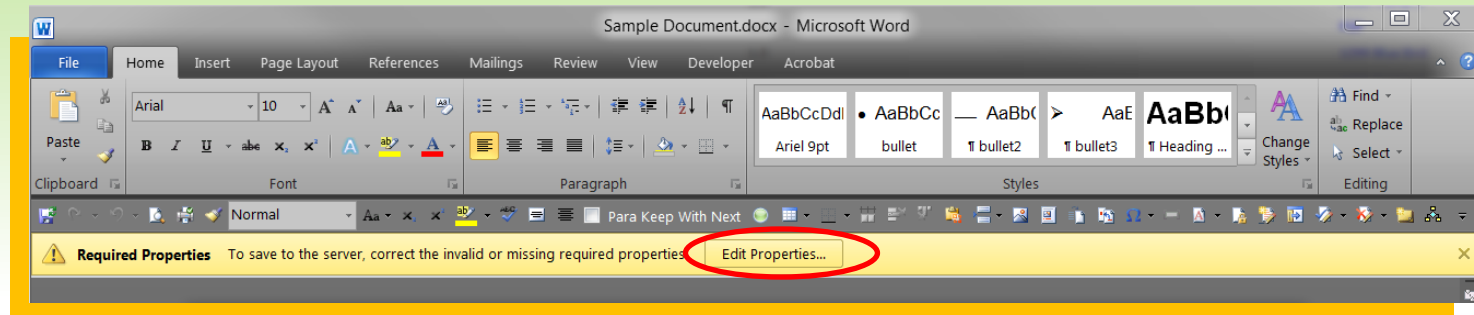


The values that require updating will highlight themselves in a broken red outline. Select from the provided options or update the information in the necessary manner to update the file.

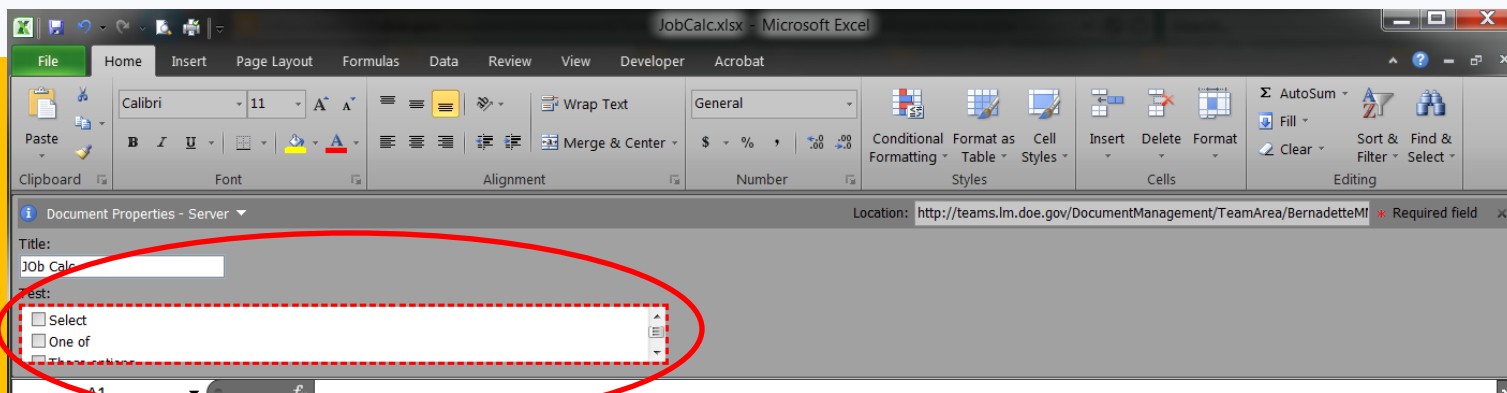


Updating File Properties in Excel

If the file properties have values that do not correspond to the current options in SharePoint (for example, if choices were updated), you will see a yellow ribbon prompting for changes. Click **Edit Properties** to display the properties panel in the document.



The values that require updating will highlight themselves in a broken red outline. Select from the provided options or update the information in the necessary manner to update the file.



Questions

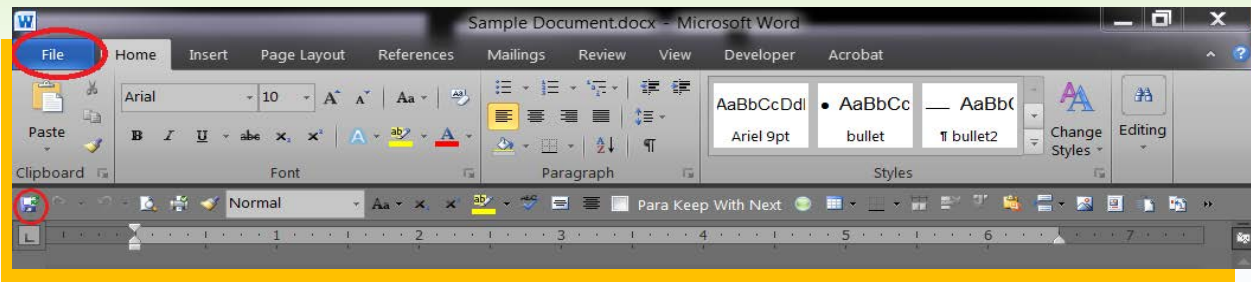


Updating Files

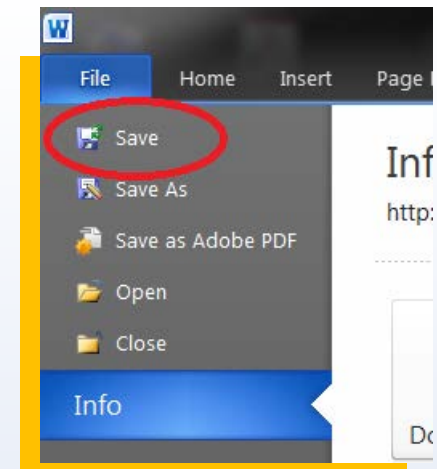
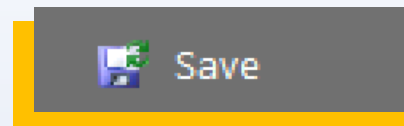
- Once you open a file for editing, you can make changes to it as you normally would. There are no differences between updating the content of a SharePoint file and an offline file.
- Track Changes and SharePoint
 - If Track Changes are on, as is standard with our files, you will not see other users' updates in real time. You will still see notifications on the bottom of your screen indicating that there is new information available.
- Some file types, such as Excel, cannot be opened in the web view if certain features are enabled.

Saving Files

Update the file as needed in SharePoint. When you are ready to save, click the **save icon**, use **Ctrl + S** on the keyboard, or go to the file menu and click **Save**. The file will be updated on SharePoint and anyone who opens it will see the most recent versions of the file.



Server copies of the file will always have a green arrow around the save icon. Always save to the server.



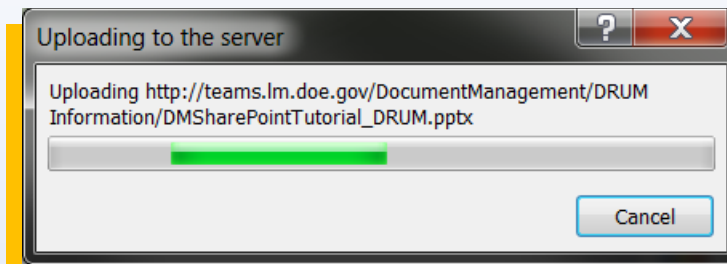
Saving Files

When you save a Microsoft file, you will see a status bar in the lower right corner of the document. It is easy to miss if you aren't looking for it.

PDF files do not have this status bar. If it was opened from SharePoint, it will save to the server.



When working with larger files or at times when the server is slow, a popup window will appear indicating the file is updating. *Be patient* and wait for it to complete. Some files become very large when many images are added. The traffic on the network, the file size, and the power of our machines all impact the time it takes to save files. The file will upload and save to the library as intended.



Questions



Co-Authoring

SharePoint offers a feature called co-authoring. This allows multiple users to work on the same file simultaneously.

Pros

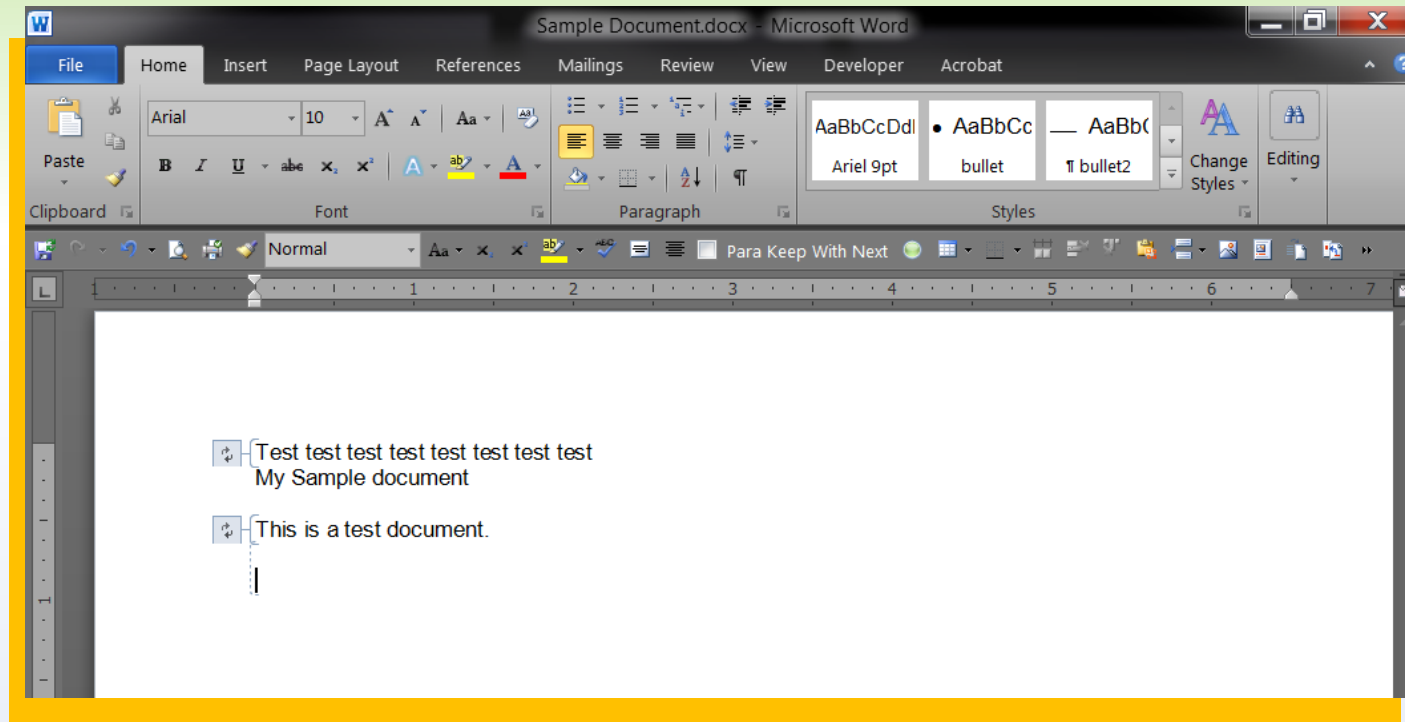
- Faster
- Real-time updates
- Collaborative work environment

Cons

- No real-time updates if using Track Changes
- Refreshing to see changes

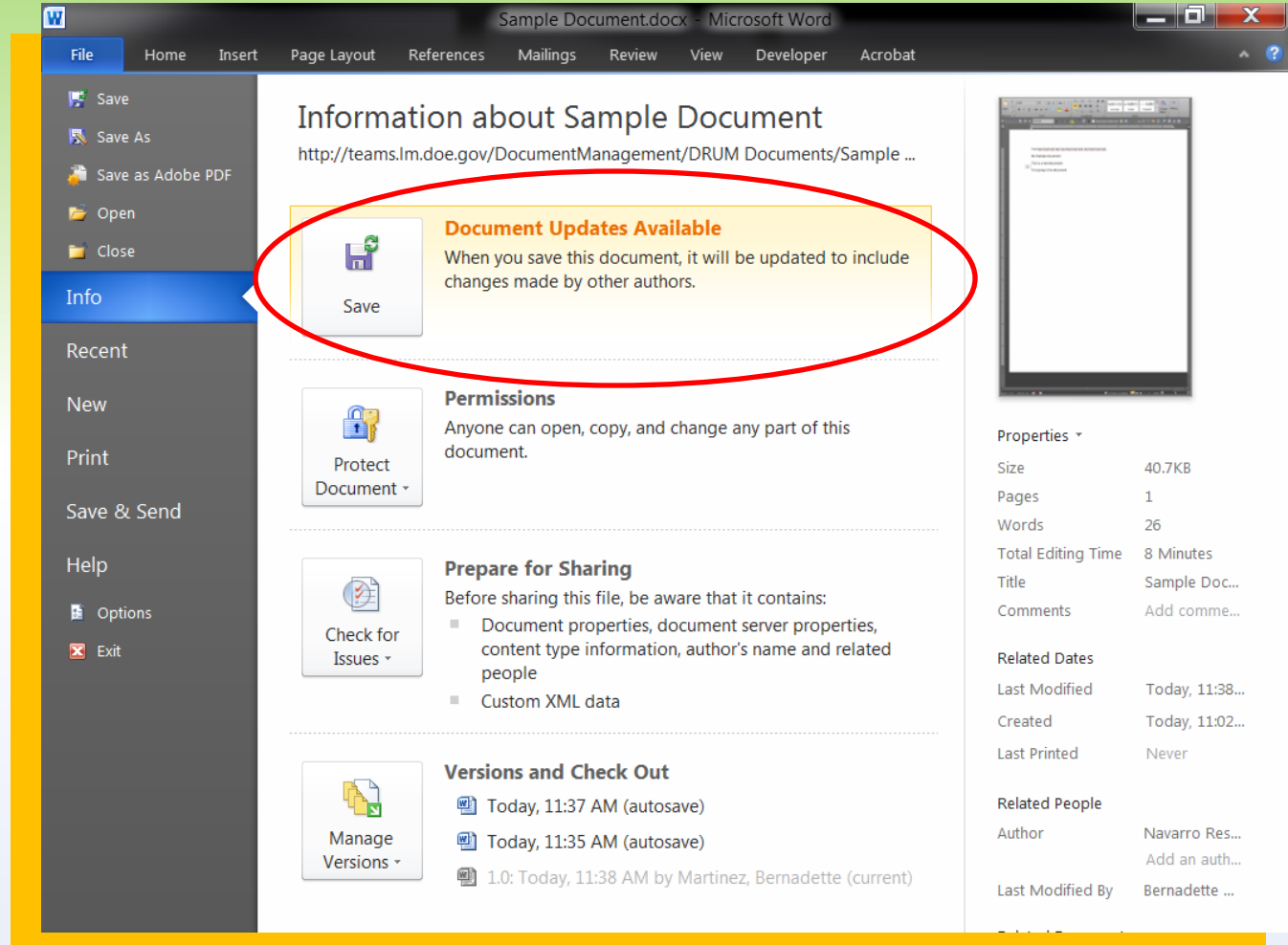
Co-Authoring

If there are changes made to the file by another user, you will be alerted. The updated areas will be bracketed and refresh arrows will be around the updated text, indicating a refresh is needed.



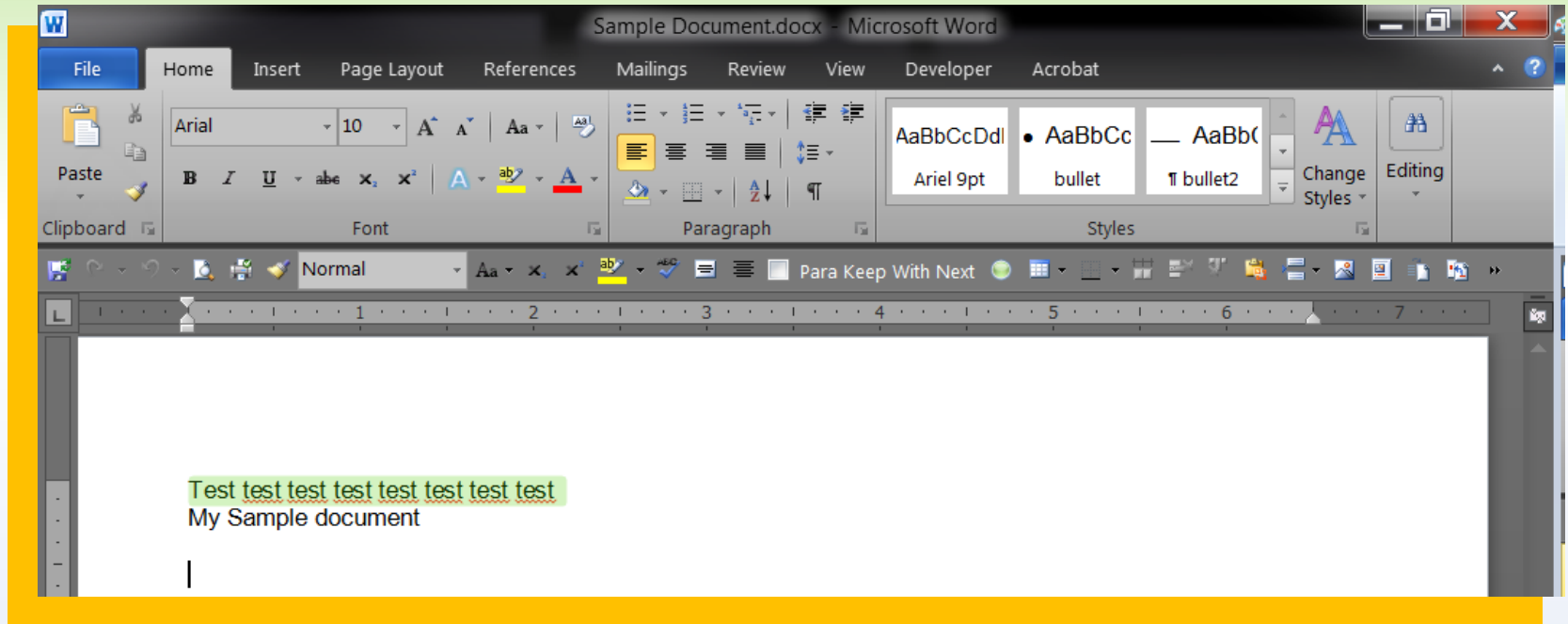
Co-Authoring

If you use the file menu to save, you will see a notification of updates in the file menu as well.



Co-Authoring

After you save to refresh the file, the updated areas will be highlighted for you to review.



Questions



Checking Out Files

If it is *absolutely necessary* to be the only person with access to a file, you can check out a file for editing. This should only be done when files are in the formatting and editing stage or a situation requires it. Otherwise, this should be avoided.

When a file is checked out, other group members cannot make updates or see updates until it is checked in by the person working on it. If that person is out or for any reason doesn't have access to SharePoint and the file is needed, it can be force checked in, but **all changes made will be lost**. There is no way to retrieve this information.

Unless the version cannot change (as in the formatting and editing stage), there are very few practical reasons for files to be checked out.

Checking Out Files

You can check out files manually or in the file. To check out a file manually:

- Check the checkbox in front of the file row. You can select multiple files to check out simultaneously.
- On the top ribbon under **Library Tools**, select **Check Out**.
- Click **OK** on the pop-up window.

The screenshot shows the 'Library Tools' ribbon with the 'Check Out' button highlighted. Below it is a table of documents:

Type	Document/Form Number	Title	Version	Document Stage	Assigned To	Name	Checked Out To	Modified	Modified By
<input type="checkbox"/>			1.0			DRUM Report Revised Appendix C priority scoring writeup 10-3 FINAL (2)		12/3/2017 6:41 PM	Talley, Tress
<input checked="" type="checkbox"/>	LMS 1234	Sample Document	1.0	Stage 1b Writing	Martinez, Bernadette	Sample Document		1/16/2018 12:26 PM	Martinez, Bernadette

The dialog box contains the following text:

You are about to check out
Name: Sample Document.docx
From: teams.lm.doe.gov

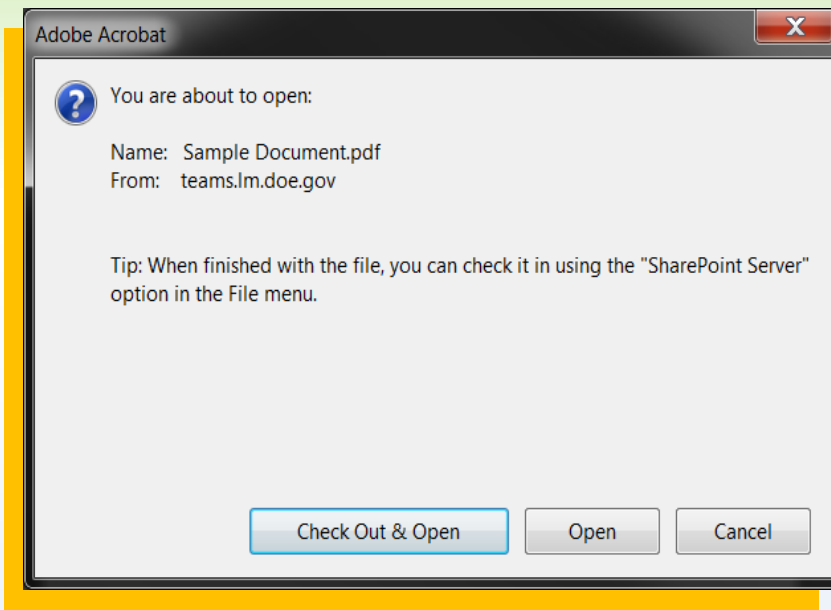
Use my local drafts folder

Buttons: OK, Cancel

Some files can harm your computer. If this information looks suspicious, or you do not fully trust the source, do not open the file.

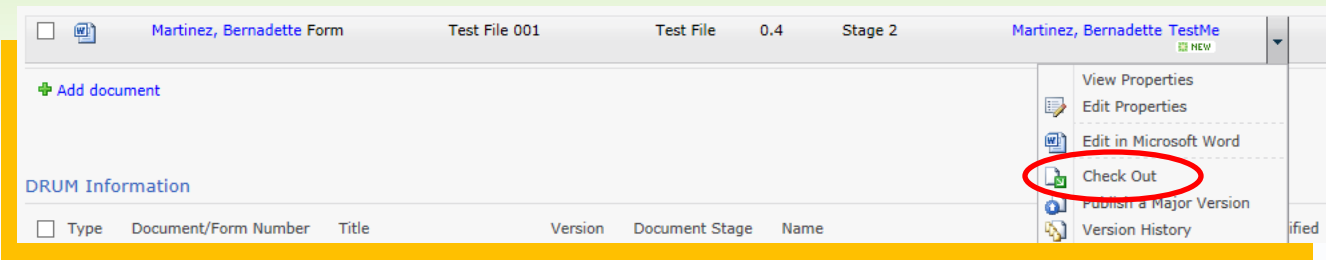
Checking Out Files

- PDF files will prompt you for check out with a dialogue box.
- Click **Check Out & Open** if you want to make any changes, including comments, to the file.



Checking Out Files

You can also click the dropdown arrow to the right of the file name select **Check Out**.





Checking Out Files

The file will **not** open automatically. You must still click on the file name to open the document. The library will update to display who has the file checked out.

Checked out files will always have a green downward-facing arrow to indicate that status.

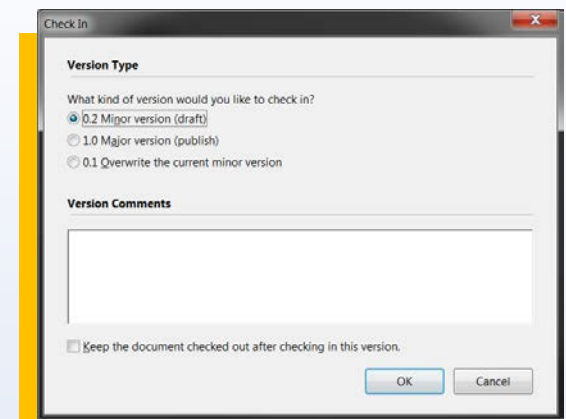
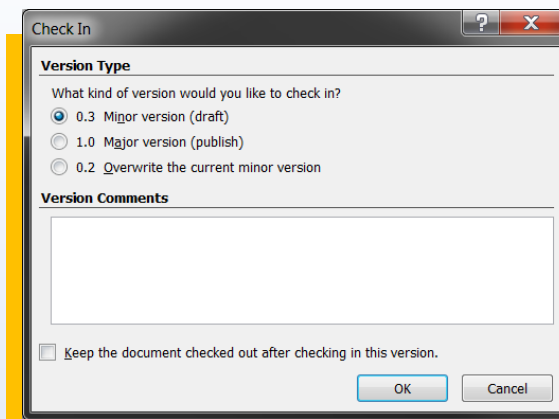
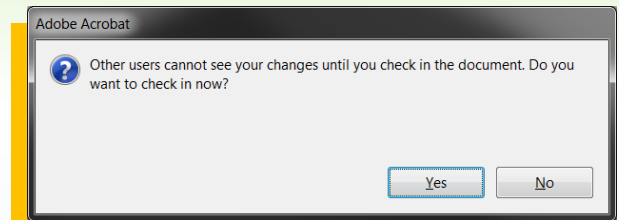
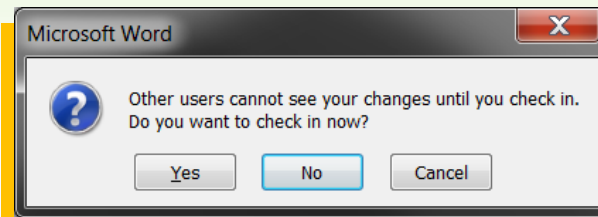
DRUM Working Documents

<input type="checkbox"/>	Type	Document/Form Number	Title	Version	Document Stage	<input type="checkbox"/>	Assigned To	Name	<input type="checkbox"/>	Checked Out To	Modified	<input type="checkbox"/>	Modified By
				1.0				DRUM Report Revised Appendix C priority scoring writeup 10-3 FINAL (2)			12/3/2017 6:41 PM		Talley, Tress
		LMS 1234	Sample Document	2.0	Stage 1b Writing		Martinez, Bernadette	Sample Document <small>NEW</small>		Martinez, Bernadette	1/16/2018 12:26 PM		Martinez, Bernadette

[+ Add document](#)

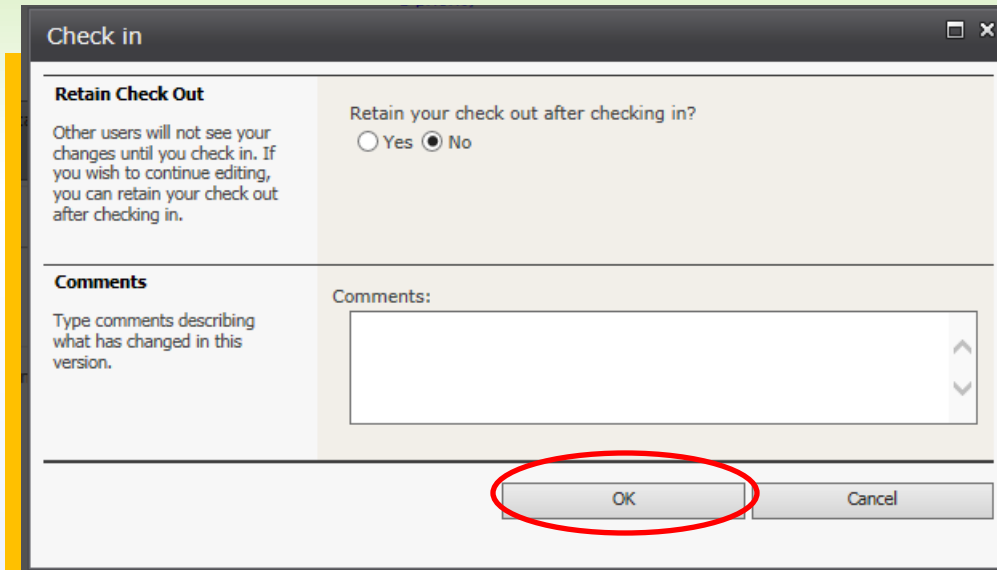
Checking In Files

- Checking in a file can be done by closing the file. Using the **X** in the upper right corner or by going to **File > Exit** menu will prompt a dialog box to check in the file.
- You do not have to check in a file until you are done with your work. Saving the file will save your work, but it will not be visible to others until you check in the document.
- Click **Yes** to check in the file.
- A second dialog will pop and prompt you for the version you want to save and a comment box.
- If you want others to be able to see your changes, but continue working without others editing a file, check the box in front of “Keep the document checked out after checking in this version.”
- Click **OK** to save.



Checking In Files

A pop-up will appear to enter comments about the changes made. Make sure the first question remains defaulted to “No” and click **OK**. The page will refresh and the file will be updated in the library.



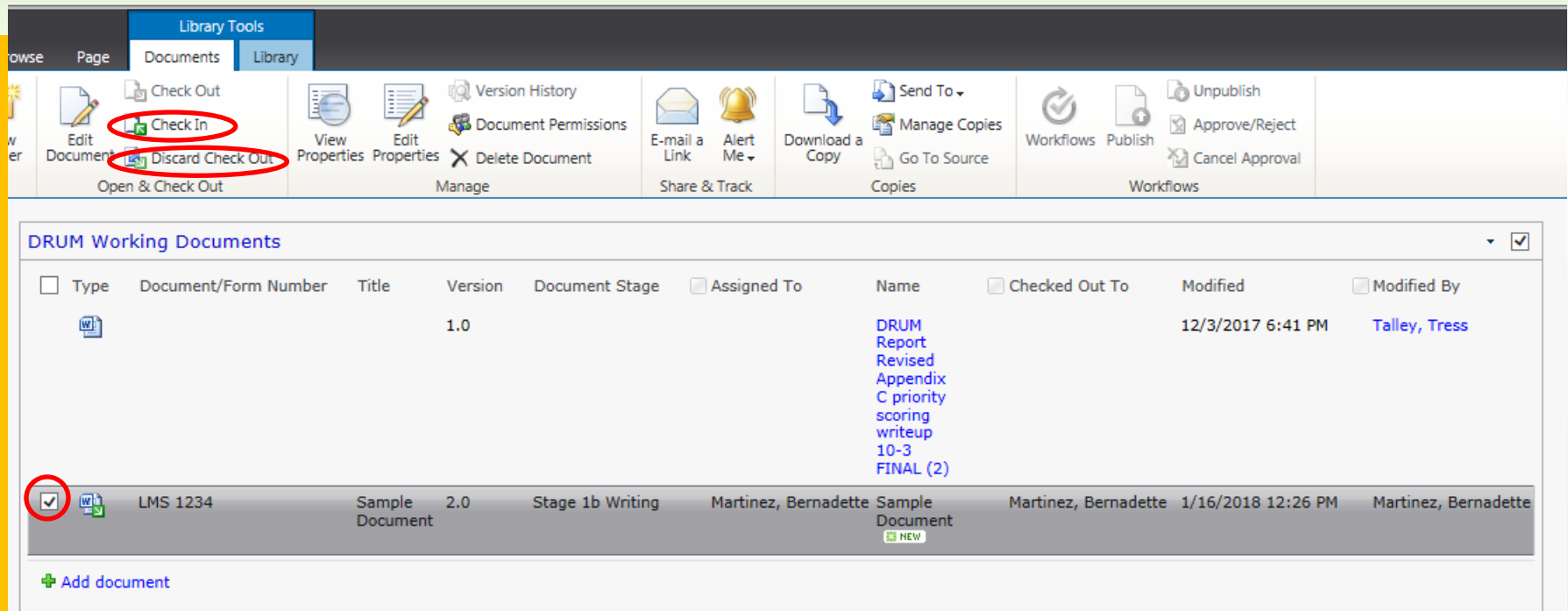
The image shows a 'Check in' dialog box with the following sections:

- Retain Check Out**: A section with a title and a description: "Other users will not see your changes until you check in. If you wish to continue editing, you can retain your check out after checking in." To the right of this text is a question: "Retain your check out after checking in?" with two radio buttons: "Yes" (unselected) and "No" (selected).
- Comments**: A section with a title and a description: "Type comments describing what has changed in this version." To the right of this text is a text input field with a vertical scrollbar.
- Buttons**: At the bottom of the dialog box are two buttons: "OK" and "Cancel". The "OK" button is circled in red.

Checking In Files

To check in a document manually, click the checkbox in front of it and click **Check In** from the Library tools ribbon.

If you checked out the file in error and have no changes to make, you can also click **Discard Check Out**.



The screenshot shows the 'Library Tools' ribbon with the following groups and items:

- Open & Check Out:** Check Out, **Check In** (circled in red), Discard Check Out (circled in red).
- Manage:** View Properties, Edit Properties, Version History, Document Permissions, Delete Document.
- Share & Track:** E-mail a Link, Alert Me.
- Copies:** Download a Copy, Send To, Manage Copies, Go To Source.
- Workflows:** Workflows, Publish, Unpublish, Approve/Reject, Cancel Approval.

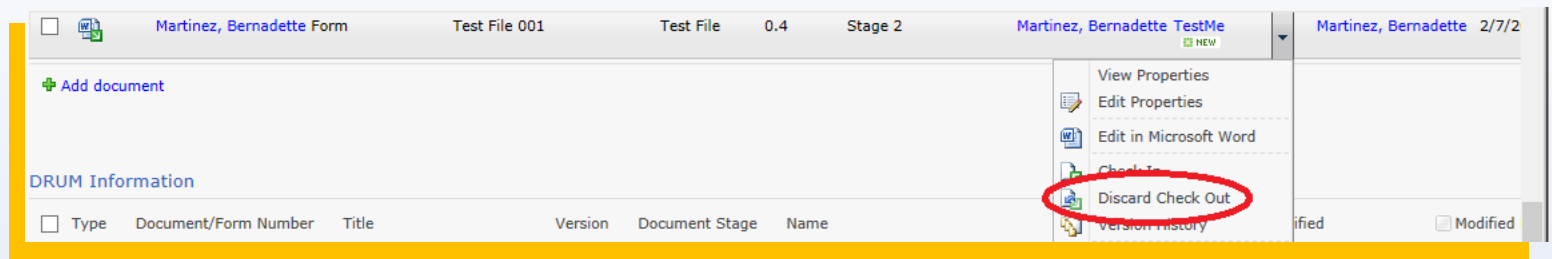
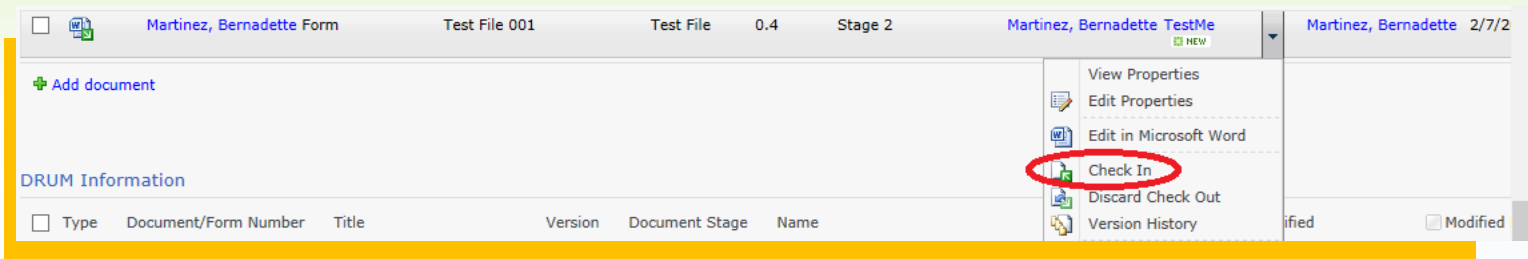
The table below shows the document list:

<input type="checkbox"/>	Type	Document/Form Number	Title	Version	Document Stage	<input type="checkbox"/>	Assigned To	Name	<input type="checkbox"/>	Checked Out To	Modified	<input type="checkbox"/>	Modified By
<input type="checkbox"/>				1.0				DRUM Report Revised Appendix C priority scoring writeup 10-3 FINAL (2)			12/3/2017 6:41 PM		Talley, Tress
<input checked="" type="checkbox"/>		LMS 1234	Sample Document	2.0	Stage 1b Writing		Martinez, Bernadette	Sample Document <small>NEW</small>		Martinez, Bernadette	1/16/2018 12:26 PM		Martinez, Bernadette

[+ Add document](#)

Checking In Files

You can also click the dropdown arrow to the right of the file name select **Check In** or **Discard Check Out**. Checking in the file this way will prompt the same pop up for version and comments.



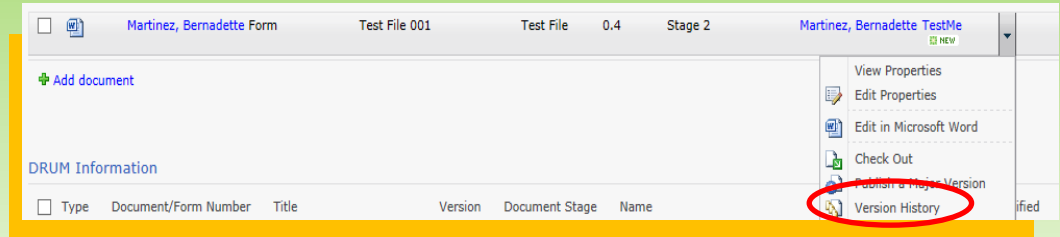
Questions



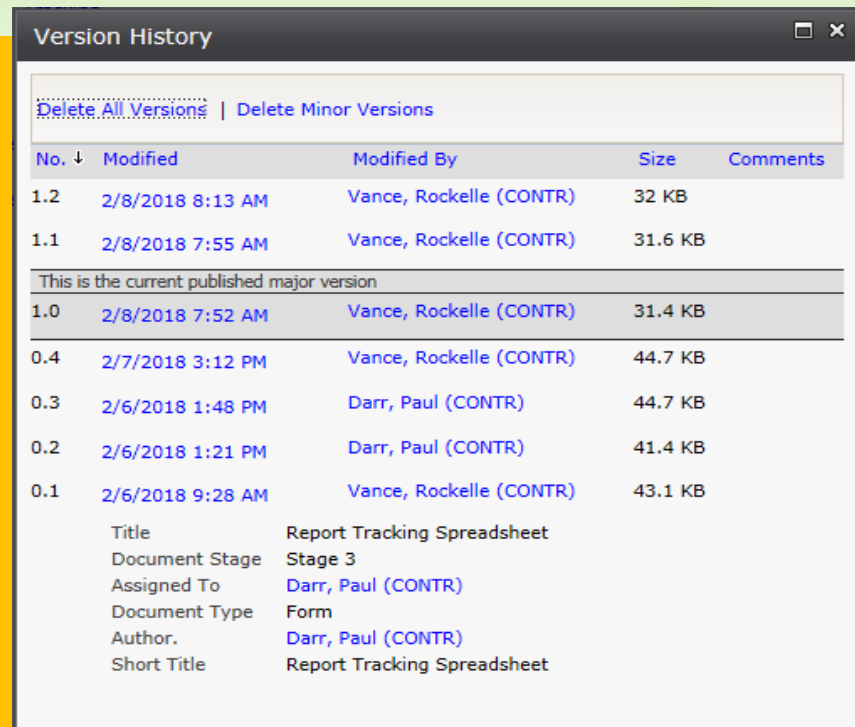
VIEWING PRIOR VERSIONS OF FILES

Viewing Prior Versions of Files

You view the version history of a file in SharePoint. Click the dropdown menu next to any file and select **Version History**.



This will show you the version, the date and time it was modified, who modified it, and the size of the file along with the file properties.



Version History

[Delete All Versions](#) | [Delete Minor Versions](#)

No. ↓	Modified	Modified By	Size	Comments
1.2	2/8/2018 8:13 AM	Vance, Rockelle (CONTR)	32 KB	
1.1	2/8/2018 7:55 AM	Vance, Rockelle (CONTR)	31.6 KB	
This is the current published major version				
1.0	2/8/2018 7:52 AM	Vance, Rockelle (CONTR)	31.4 KB	
0.4	2/7/2018 3:12 PM	Vance, Rockelle (CONTR)	44.7 KB	
0.3	2/6/2018 1:48 PM	Darr, Paul (CONTR)	44.7 KB	
0.2	2/6/2018 1:21 PM	Darr, Paul (CONTR)	41.4 KB	
0.1	2/6/2018 9:28 AM	Vance, Rockelle (CONTR)	43.1 KB	

Title: Report Tracking Spreadsheet
Document Stage: Stage 3
Assigned To: Darr, Paul (CONTR)
Document Type: Form
Author: Darr, Paul (CONTR)
Short Title: Report Tracking Spreadsheet

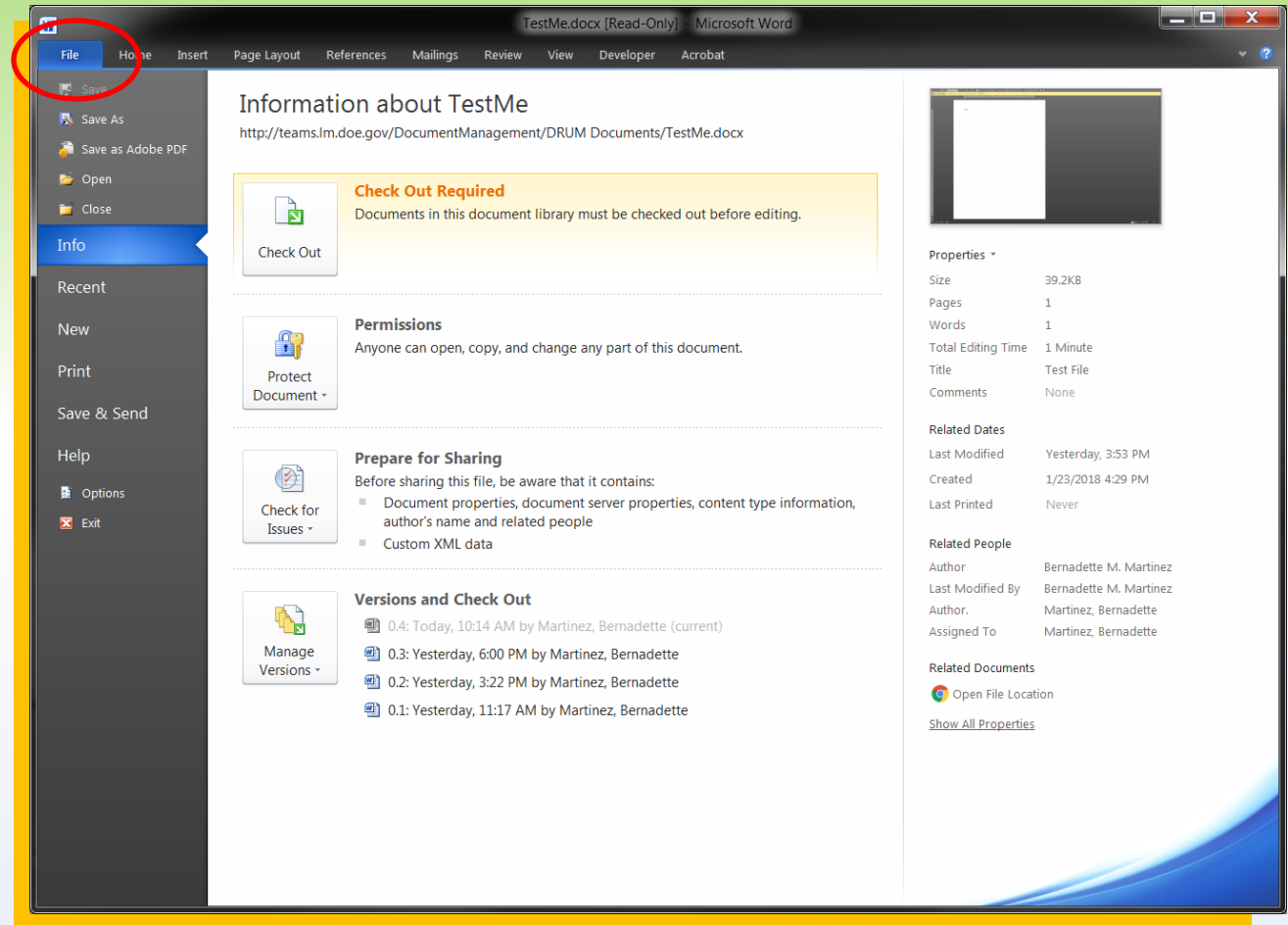
This will not show changes to the file.

Microsoft provides instructions for viewing prior versions [here](#).

Viewing Prior Versions of Files

You can view previous versions of a file in Word, Excel, or PowerPoint without checking out the file.

To view a previous version, open the file and go to the **File** menu.



The screenshot shows the Microsoft Word interface for a document named 'TestMe.docx [Read-Only]'. The 'File' menu is highlighted with a red circle. The 'Information about TestMe' pane is open, displaying the following information:

- Check Out Required:** Documents in this document library must be checked out before editing.
- Permissions:** Anyone can open, copy, and change any part of this document.
- Prepare for Sharing:** Before sharing this file, be aware that it contains:
 - Document properties, document server properties, content type information, author's name and related people
 - Custom XML data
- Versions and Check Out:**
 - 0.4: Today, 10:14 AM by Martinez, Bernadette (current)
 - 0.3: Yesterday, 6:00 PM by Martinez, Bernadette
 - 0.2: Yesterday, 3:22 PM by Martinez, Bernadette
 - 0.1: Yesterday, 11:17 AM by Martinez, Bernadette

The right-hand pane shows the document's properties:

Properties	
Size	39.2KB
Pages	1
Words	1
Total Editing Time	1 Minute
Title	Test File
Comments	None
Related Dates	
Last Modified	Yesterday, 3:53 PM
Created	1/23/2018 4:29 PM
Last Printed	Never
Related People	
Author	Bernadette M. Martinez
Last Modified By	Bernadette M. Martinez
Author.	Martinez, Bernadette
Assigned To	Martinez, Bernadette
Related Documents	
Open File Location	
Show All Properties	

Viewing Prior Versions of Files

Go to **Versions**
and **Check Out**.

Click on any
version to open
a read-only
copy of that
version.

The screenshot shows the Microsoft Word interface for a document named 'TestMe.docx'. The ribbon includes File, Home, Insert, Page Layout, References, Mailings, Review, View, Developer, and Acrobat. The left sidebar contains options like Save, Save As, Open, Close, Info, Recent, New, Print, Save & Send, and Help. The main content area displays 'Information about TestMe' with a URL: http://teams.lm.doe.gov/DocumentManagement/DRUM Documents/TestMe.docx. A yellow banner indicates 'Check Out Required' with the message: 'Documents in this document library must be checked out before editing.' Below this are sections for 'Permissions' (Anyone can open, copy, and change any part of this document), 'Prepare for Sharing' (Before sharing this file, be aware that it contains: Document properties, document server properties, content type information, author's name and related people, Custom XML data), and 'Versions and Check Out'. The 'Versions and Check Out' section is circled in red and lists the following versions:

- 0.4: Today, 10:14 AM by Martinez, Bernadette (current)
- 0.3: Yesterday, 6:00 PM by Martinez, Bernadette
- 0.2: Yesterday, 3:22 PM by Martinez, Bernadette
- 0.1: Yesterday, 11:17 AM by Martinez, Bernadette

Other sections include 'Check for Issues', 'Protect Document', 'Related Dates' (Last Modified: Yesterday, 3:53 PM; Created: 1/23/2018 4:29 PM; Last Printed: Never), 'Related People' (Author: Bernadette M. Martinez; Last Modified By: Bernadette M. Martinez; Assigned To: Martinez, Bernadette), and 'Related Documents' (Open File Location, Show All Properties).

Viewing Prior Versions of Files

There is a drop down menu under **Manage Versions**. Word, Excel, and PowerPoint will allow you to refresh the version list, check out the file, and recover unsaved files from this list.

Word will also allow you to compare versions in a unique window.

Word

The screenshot shows the 'Versions and Check Out' menu in Microsoft Word. At the top, there is a 'Manage Versions' dropdown menu. Below it, a list of versions is displayed: 'Today, 11:58 AM (autosave)', 'Today, 11:42 AM (autosave)', and 'Today, 11:32 AM (autosave)'. The 'Today, 11:32 AM (autosave)' version is selected. A dropdown menu is open, showing several options: 'Refresh Server Versions List' (Check for new versions available on the server.), 'Check Out' (Edit a private copy and prevent other people from making changes.), 'Compare with Major Version' (Compare this document with the last major version published on the server.), 'Compare with Last Version' (Compare this document with the last version saved on the server.), and 'Recover Unsaved Documents' (Browse recent copies of unsaved files.).

Excel

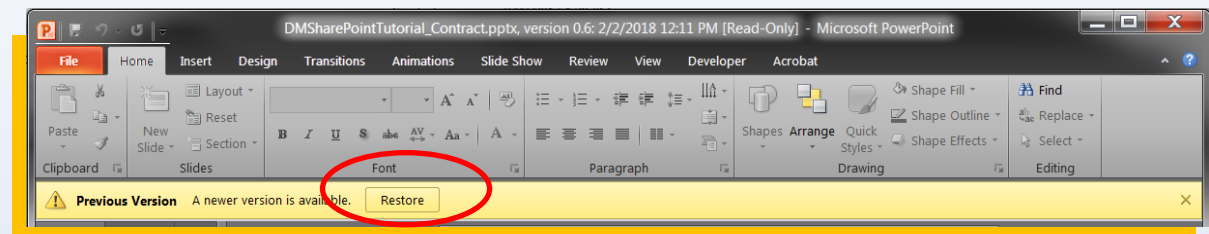
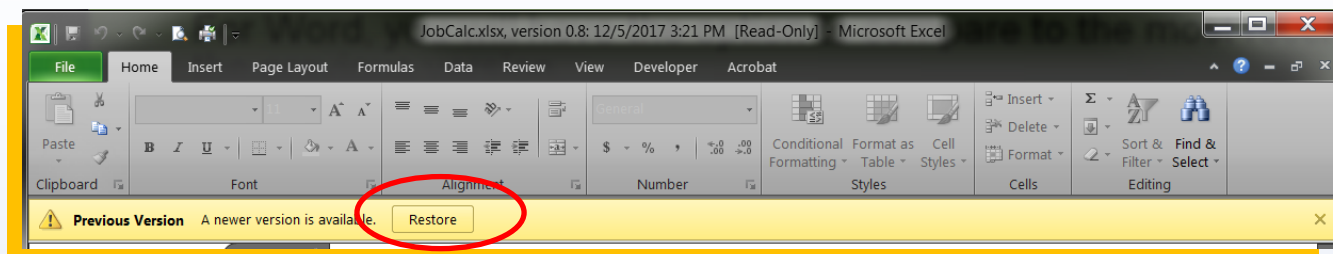
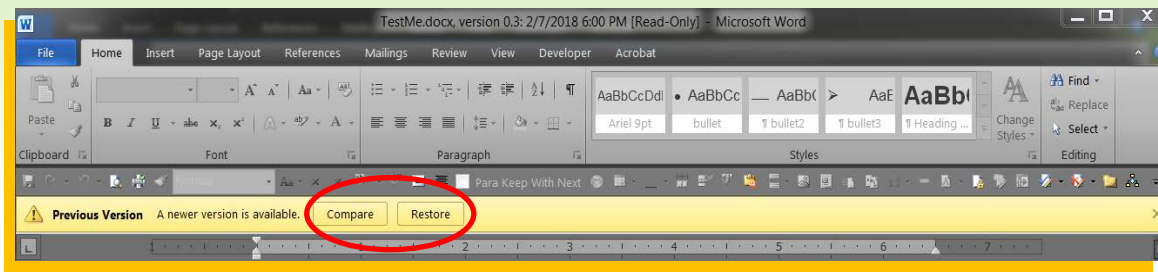
The screenshot shows the 'Versions and Check Out' menu in Microsoft Excel. At the top, there is a 'Manage Versions' dropdown menu. Below it, a list of versions is displayed: '0.9: 12/5/2017 5:30 PM by Martinez, Bernadette (current)', '0.8: 12/5/2017 4:21 PM by Martinez, Bernadette', and '0.7: 12/5/2017 4:00 PM by Martinez, Bernadette'. The '0.9: 12/5/2017 5:30 PM by Martinez, Bernadette (current)' version is selected. A dropdown menu is open, showing several options: 'Refresh Server Versions List' (Check for new versions available on the server.), 'Check Out' (Edit a private copy and prevent other people from making changes.), and 'Recover Unsaved Workbooks' (Browse recent copies of unsaved files.).

PowerPoint

The screenshot shows the 'Versions and Check Out' menu in Microsoft PowerPoint. At the top, there is a 'Manage Versions' dropdown menu. Below it, a list of versions is displayed: '0.7: 2/28/2018 10:48 AM by Martinez, Bernadette (current)', '0.6: 2/2/2018 1:11 PM by Martinez, Bernadette', and '0.5: 1/29/2018 6:20 PM by Martinez, Bernadette'. The '0.7: 2/28/2018 10:48 AM by Martinez, Bernadette (current)' version is selected. A dropdown menu is open, showing several options: 'Refresh Server Versions List' (Check for new versions available on the server.), 'Check Out' (Edit a private copy and prevent other people from making changes.), and 'Recover Unsaved Presentations' (Browse recent copies of unsaved files.).

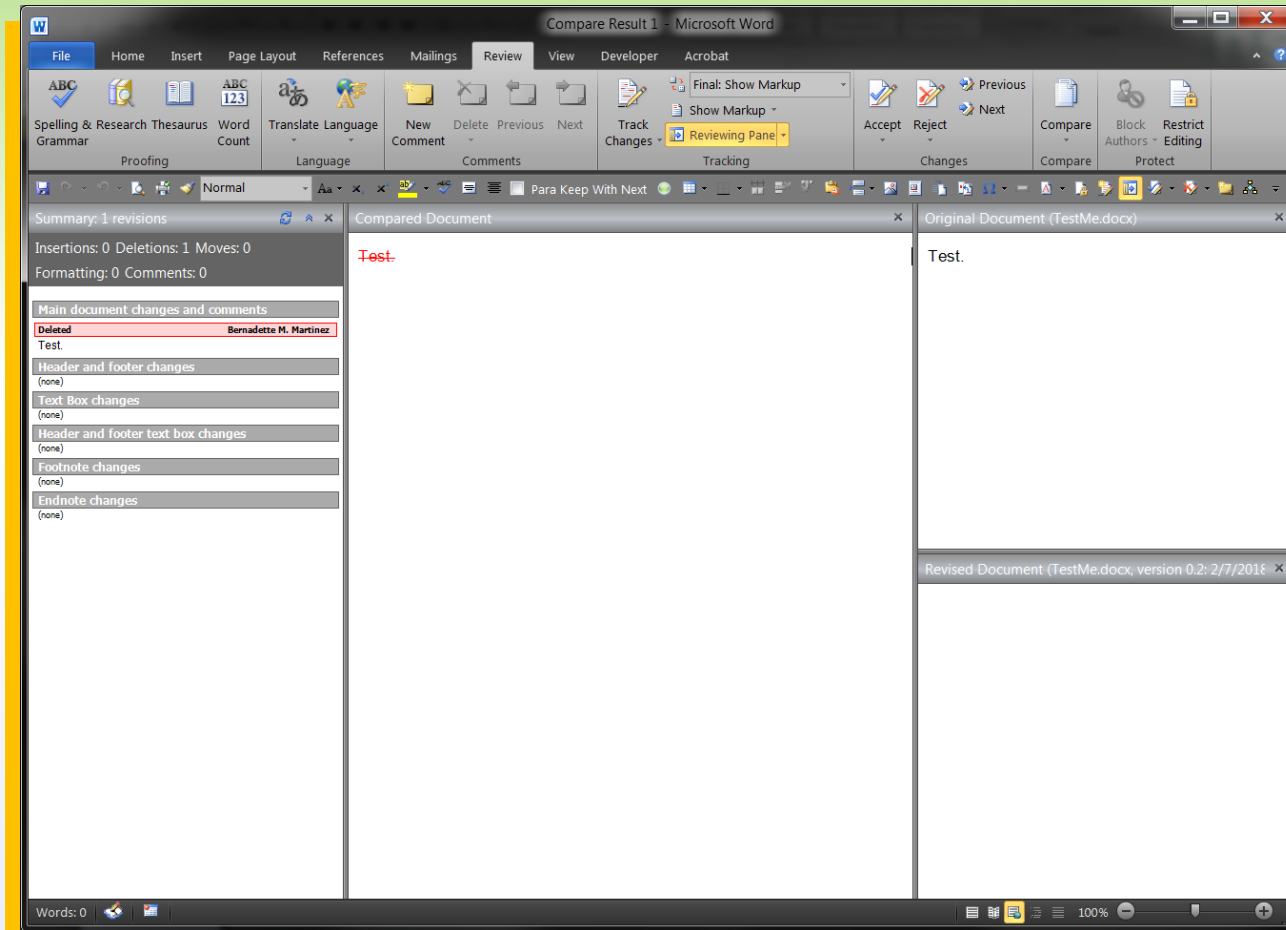
Viewing Prior Versions of Files

The previous version will open in a separate file. For Word, you will have the option to compare to the most recent version or restore the previous version. For Excel and PowerPoint, you will have the option to restore the previous version as the most current.



Viewing Prior Versions of Files

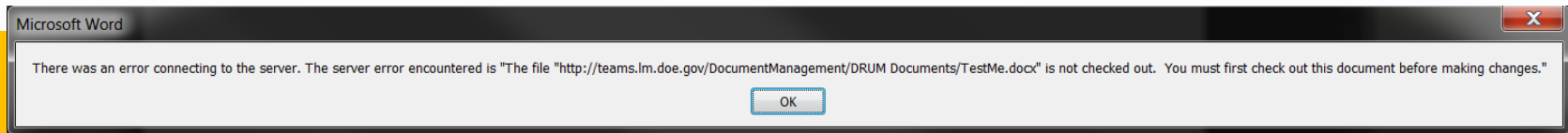
Comparing the file in Word will open a window highlighting the changes.



Viewing Prior Versions of Files

If you attempt to restore the file without checking it out, you will receive an error message.

Files generally will not need to be restored.

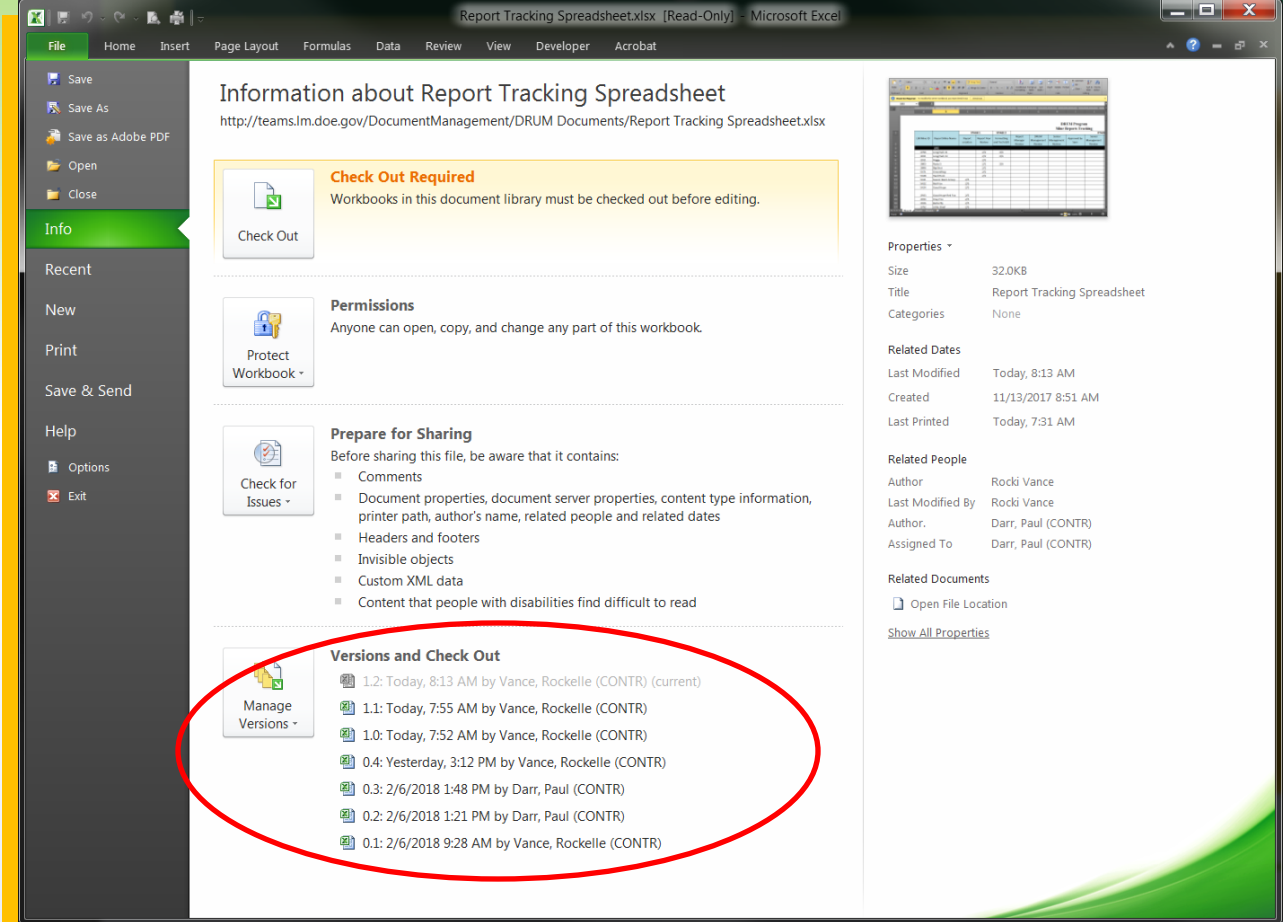


Viewing Prior Versions of Files

You can view prior versions of a file in Word without checking out the file.

To view a prior version, open the Excel file and go to the **File** menu and go to **Versions and Check Out**.

Prior versions can be viewed and restored, but Excel does not offer a compare function.



The screenshot shows the Microsoft Excel interface with the 'Information about Report Tracking Spreadsheet' dialog box open. The 'File' menu is visible on the left. The dialog box contains several sections: 'Check Out Required', 'Permissions', 'Prepare for Sharing', and 'Versions and Check Out'. The 'Versions and Check Out' section is circled in red and lists the following versions:

Version	Author	Timestamp	Status
1.2	Vance, Rockelle (CONTR)	Today, 8:13 AM	(current)
1.1	Vance, Rockelle (CONTR)	Today, 7:55 AM	
1.0	Vance, Rockelle (CONTR)	Today, 7:52 AM	
0.4	Vance, Rockelle (CONTR)	Yesterday, 3:12 PM	
0.3	Darr, Paul (CONTR)	2/6/2018 1:48 PM	
0.2	Darr, Paul (CONTR)	2/6/2018 1:21 PM	
0.1	Vance, Rockelle (CONTR)	2/6/2018 9:28 AM	

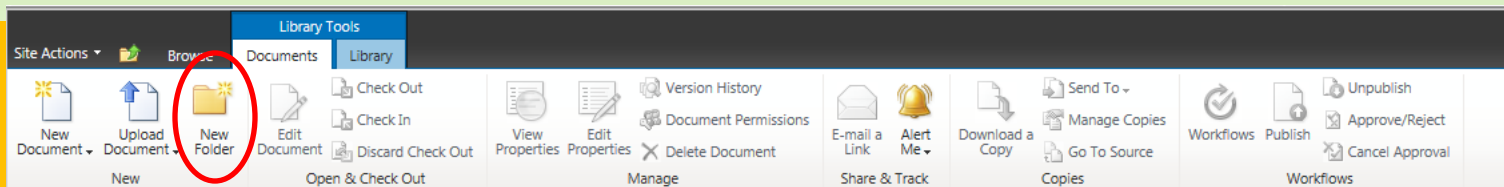
Questions



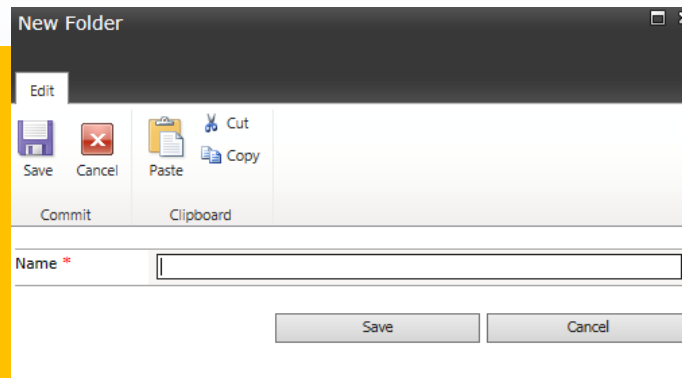
ADDING AND WORKING WITH FOLDERS

Adding and Working with Folders

You can add folders to any SharePoint library to organize files. To add a folder, go to the library you want to add a folder to. Under the **Library Tools** > **Documents** menu, click **New Folder**.



Add the name of the folder in the **Name** field and click **Save**.



Adding and Working with Folders

To add new documents to the folder, click the name of the folder under the Name column in the library. The list will reload to display files under that folder or an empty folder, if no files have been added.

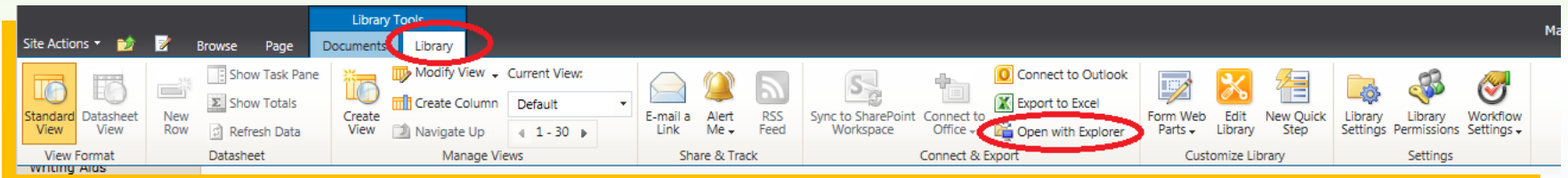
Click **Add a document** and follow the normal upload procedure to upload files directly to the desired folder.

DRUM Working Documents

<input type="checkbox"/> Type	<input type="checkbox"/> Author.	Document Type	Document/Form Number	Short Title	Version	Document Stage	<input type="checkbox"/> Assigned To	Name
					1.0			Annex Mine Report
					1.0			5416 Tramp 2
					1.0			Rusty 5
	Zutman, Marci (CONTR)	Mine report			1.7	Working draft	Zutman, Marci (CONTR)	Appendix Risk Scoring Criteria
	Zutman, Marci (CONTR)				1.8	Final report	Zutman, Marci (CONTR)	Appendix A Investigation Methods
	Zutman, Marci (CONTR)	Mine report			1.8	Final report	Zutman, Marci (CONTR)	Appendix B Glossary
	Zutman, Marci (CONTR)	Mine report			1.6	Final draft	Zutman, Marci (CONTR)	Appendix Risk Scoring

Windows Explorer View

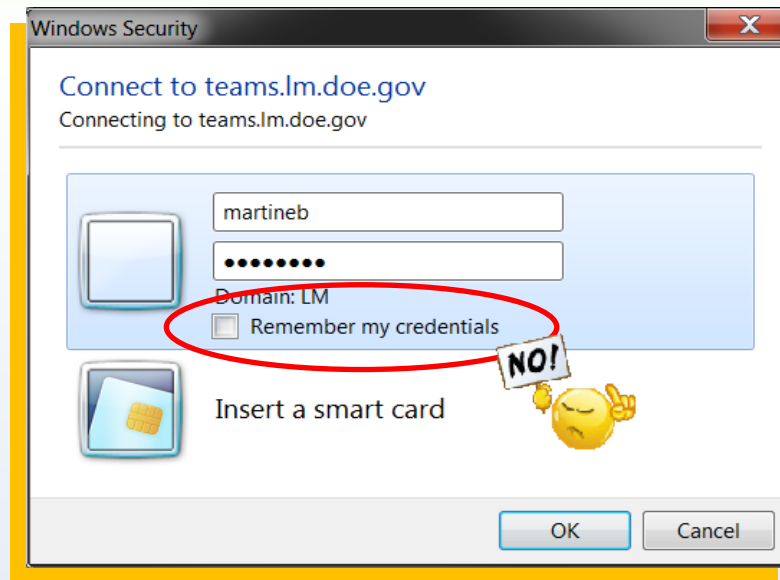
To add existing files to the folder, go to the **Library Tools > Library** menu and click **Open with Explorer** in the ribbon.



Windows Explorer View

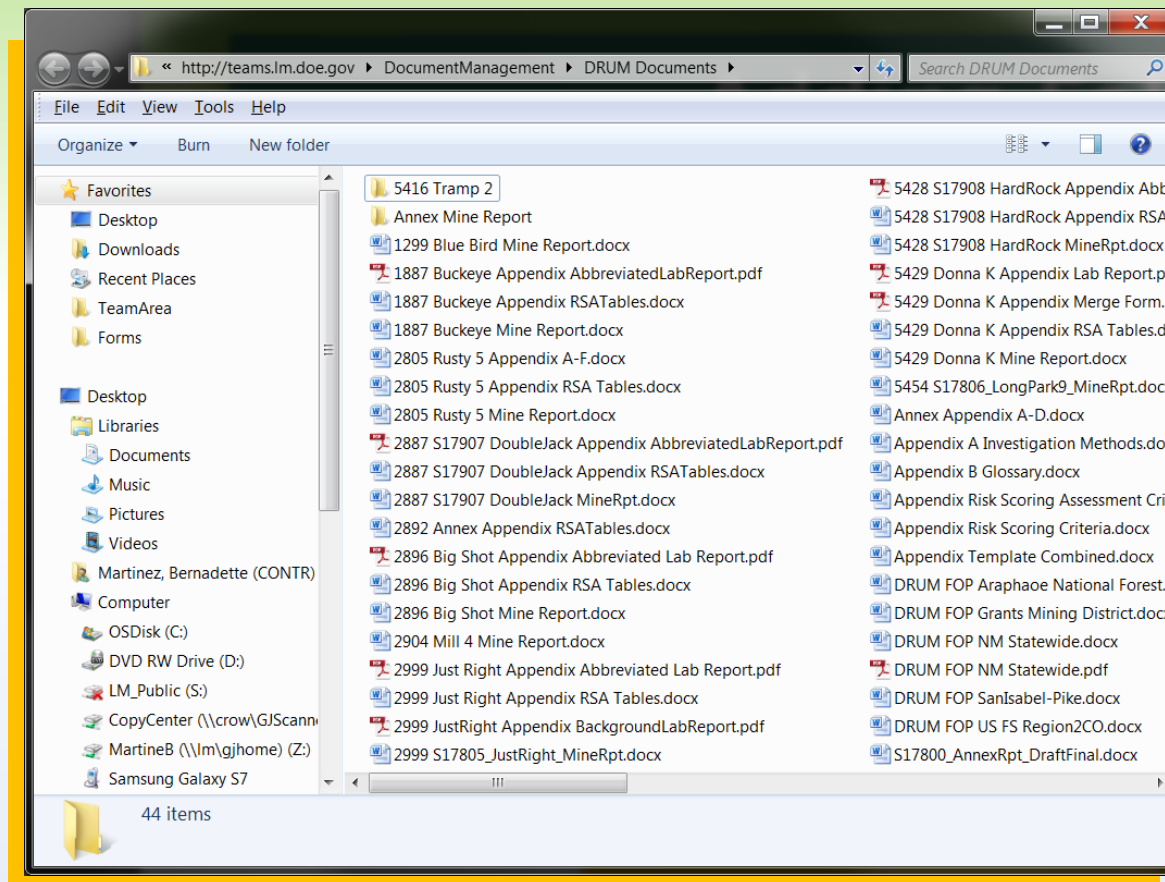
The first time you open this each day, you will receive a login screen. Use your Windows/McAfee login information.

- Do not use your PIV information.
- Do not click “Remember my credentials”
- If you get an error message, you need to delete the temporary files from Internet Explorer, follow the steps in [Deleting Temporary Internet Files](#).



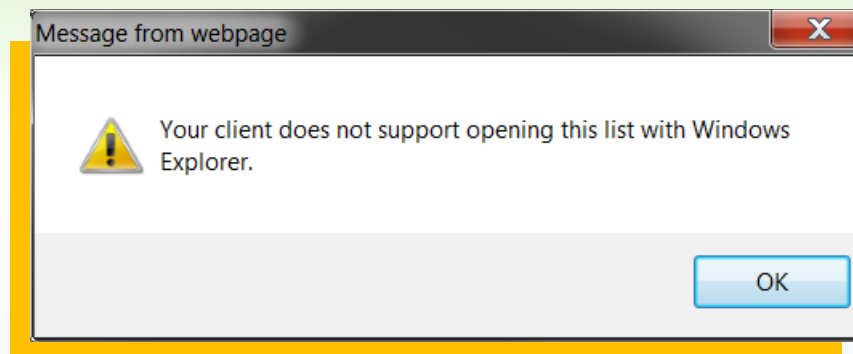
Windows Explorer View

A typical folder window will open on your desktop. This functions like any other Windows folder.



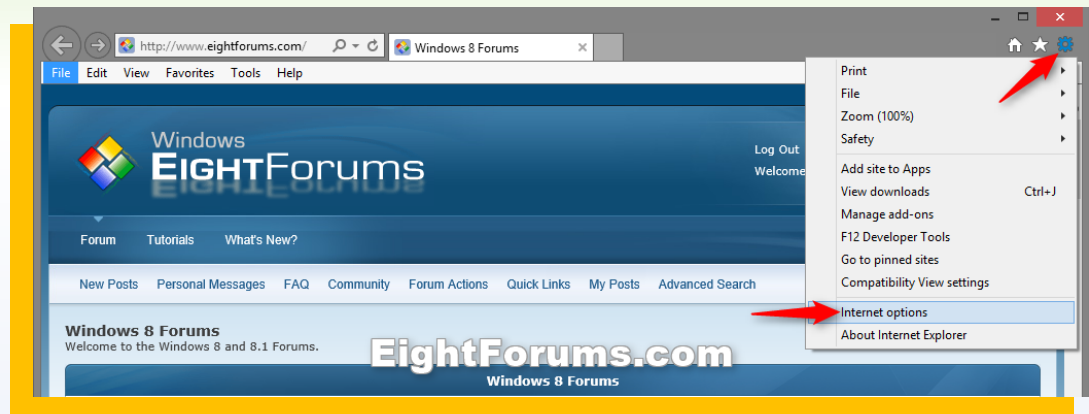
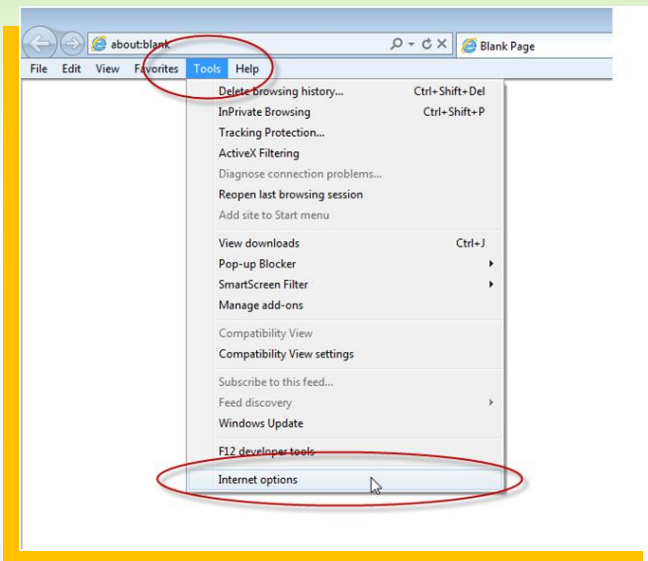
Deleting Temporary Internet Files

If you cannot open the Windows Explorer view from SharePoint at any time or receive an error message stating the client doesn't support opening the list with Windows Explorer, these steps **must** be taken.



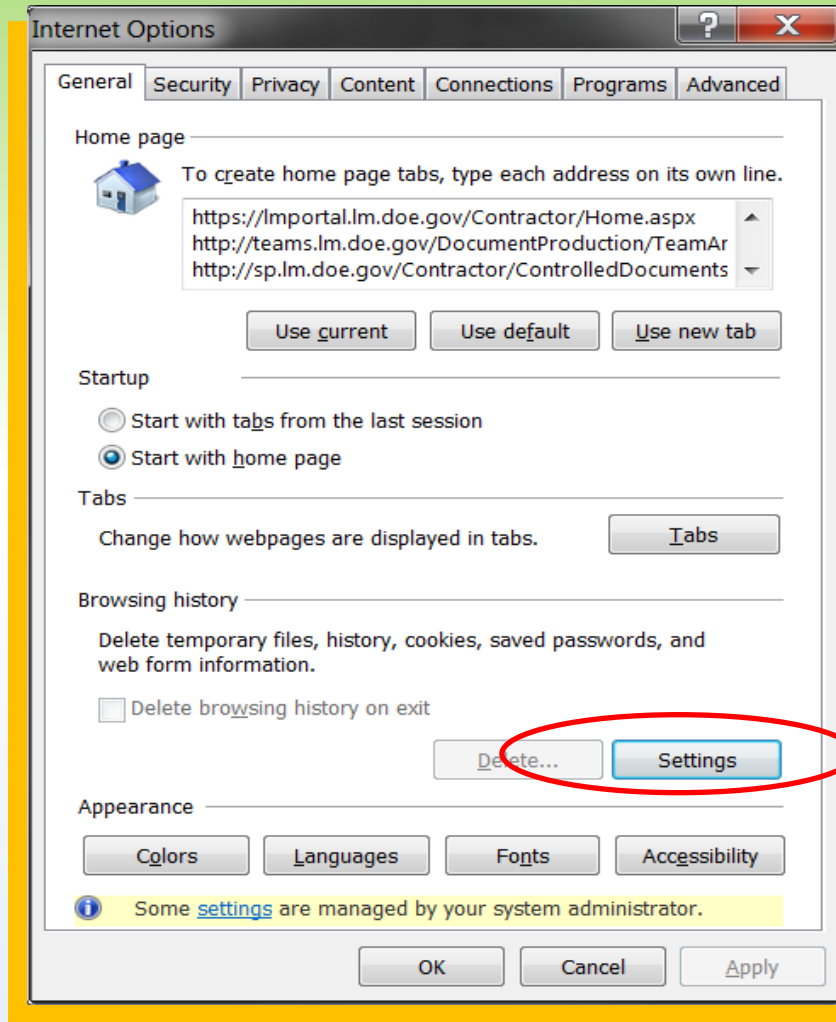
Deleting Temporary Internet Files

- Open Internet Explorer and go to **Tools > Internet options**.
- You can also access the **gear** in the upper right corner and select **Internet options**.



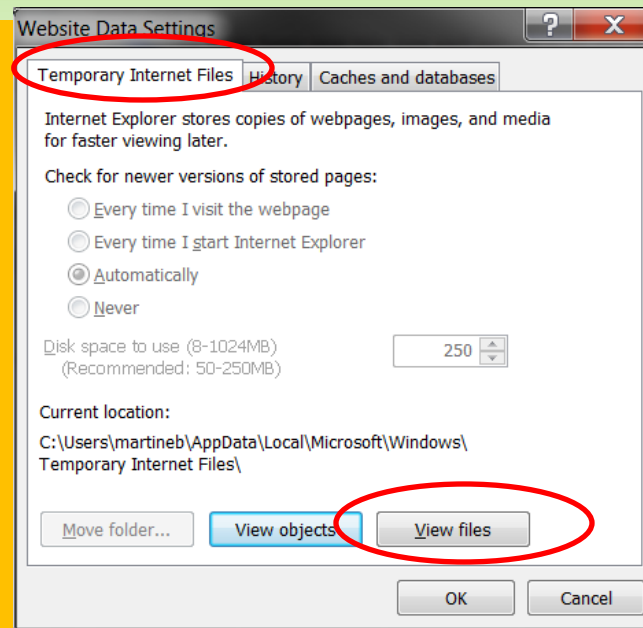
Deleting Temporary Internet Files

- Click **Settings**.



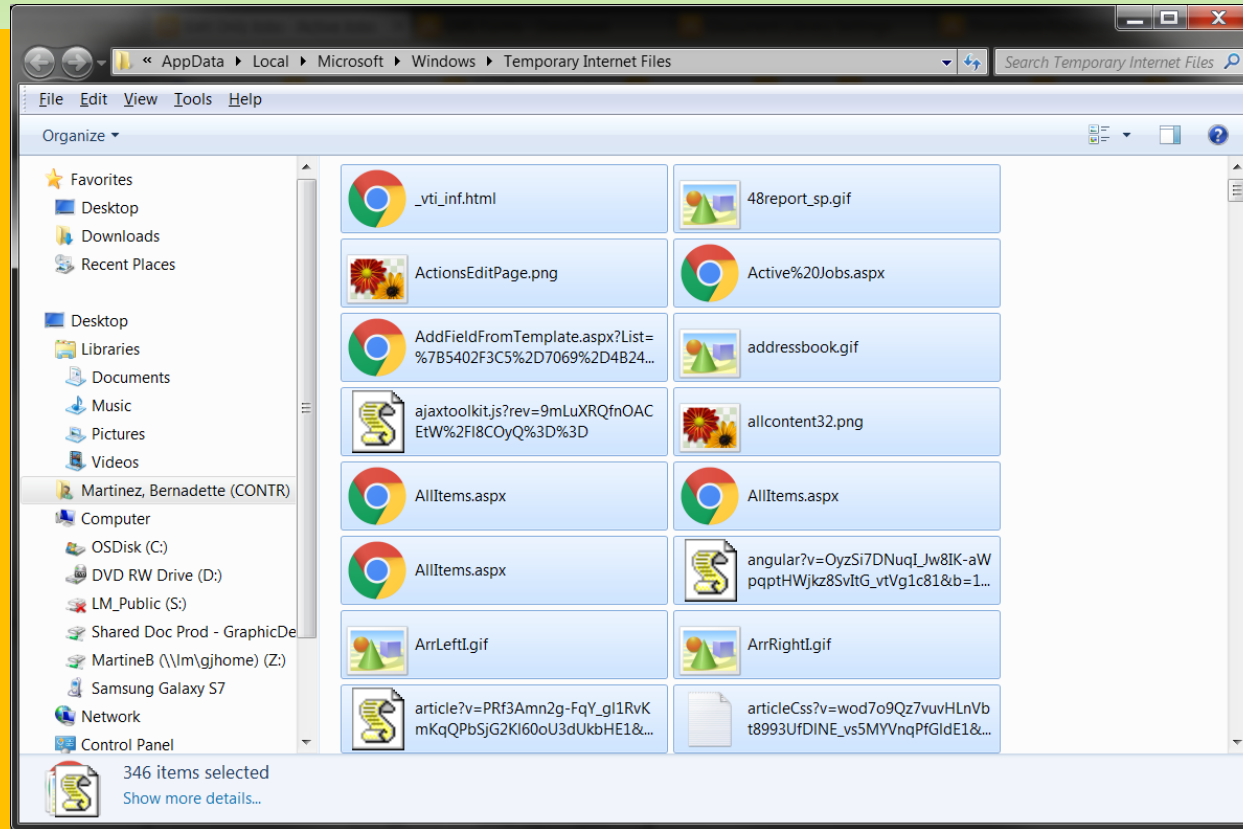
Deleting Temporary Internet Files

- Click **Temporary Internet Files > View Files**.



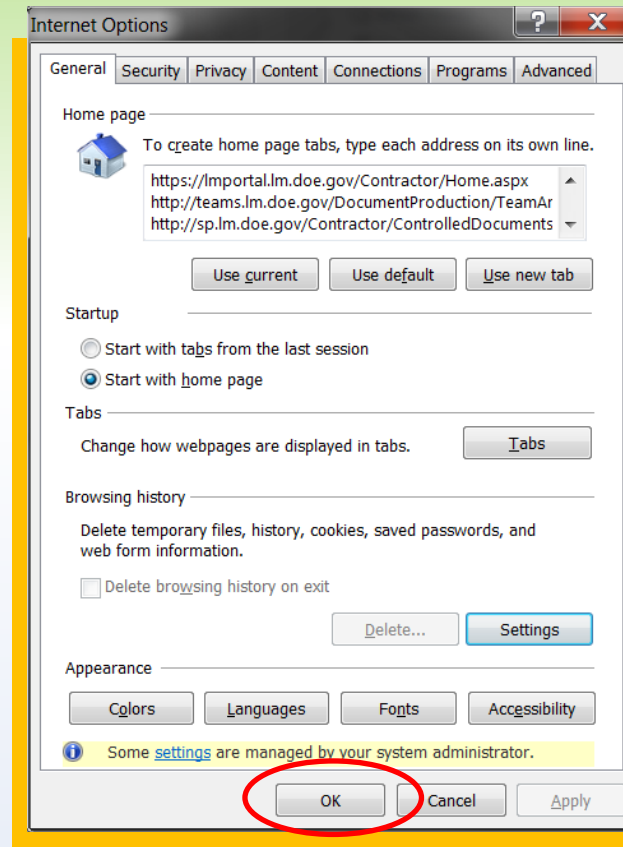
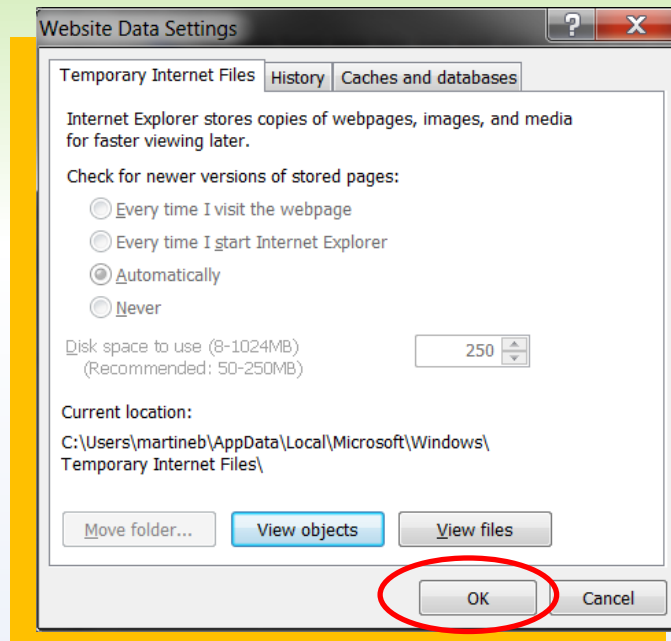
Deleting Temporary Internet Files

- In the folder that opens, select all files and delete them.



Deleting Temporary Internet Files

- Click OK to close the two open system windows. You should now be able to open the Windows Explorer view in SharePoint.



Questions

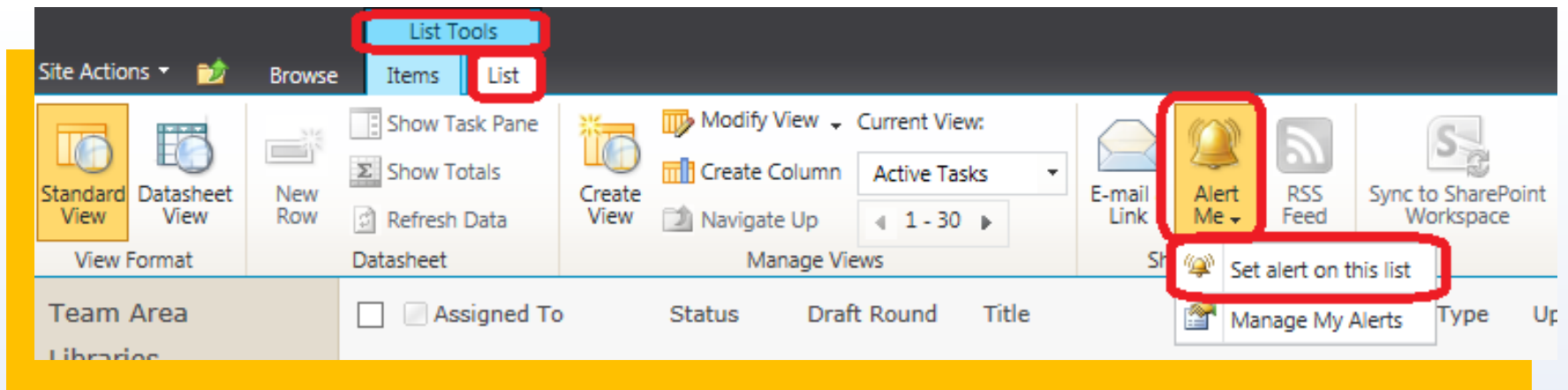


ALERTS

Alerts

Alerts let you know when a document, list, or library is updated based on criteria you set.

To set an alert on a list or library, navigate to the list or library. Under **Library Tools > List (Library)** click the dropdown menu under **Alert Me** and select **Set alert on this list (library)**.



Alerts

Select the criteria for the alert and click **OK**.

Libraries and lists will have different options.

Forms Task List - New Alert

OK Cancel

Alert Title
Enter the title for this alert. This is included in the subject of the notification sent for this alert.

Forms Task List

Send Alerts To
You can enter user names or e-mail addresses. Separate them with semicolons.

Users:
Martinez, Bernadette ;

Delivery Method
Specify how you want the alerts delivered.

Send me alerts by:

E-mail Bernadette.Martinez@lm.doe.gov

Text Message (SMS)

Send URL in text message (SMS)

Change Type
Specify the type of changes that you want to be alerted to.

Only send me alerts when:

All changes

New items are added

Existing items are modified

Items are deleted

Send Alerts for These Changes
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

Send me an alert when:

Anything changes

A task is assigned to me

A task becomes complete

A high priority task changes

Someone else changes a task assigned to me

Someone else changes a task

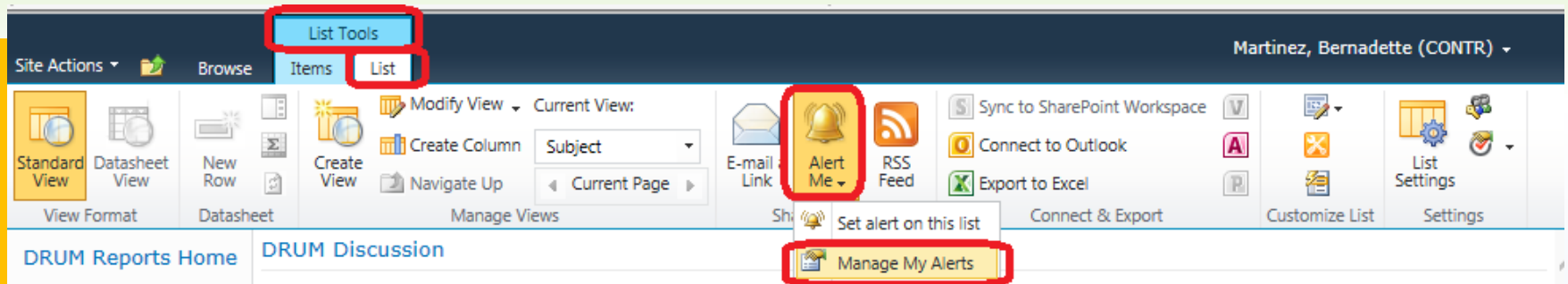
Someone else changes a task created by me

Someone else changes a task last modified by me

Someone changes an item that appears in the following view:

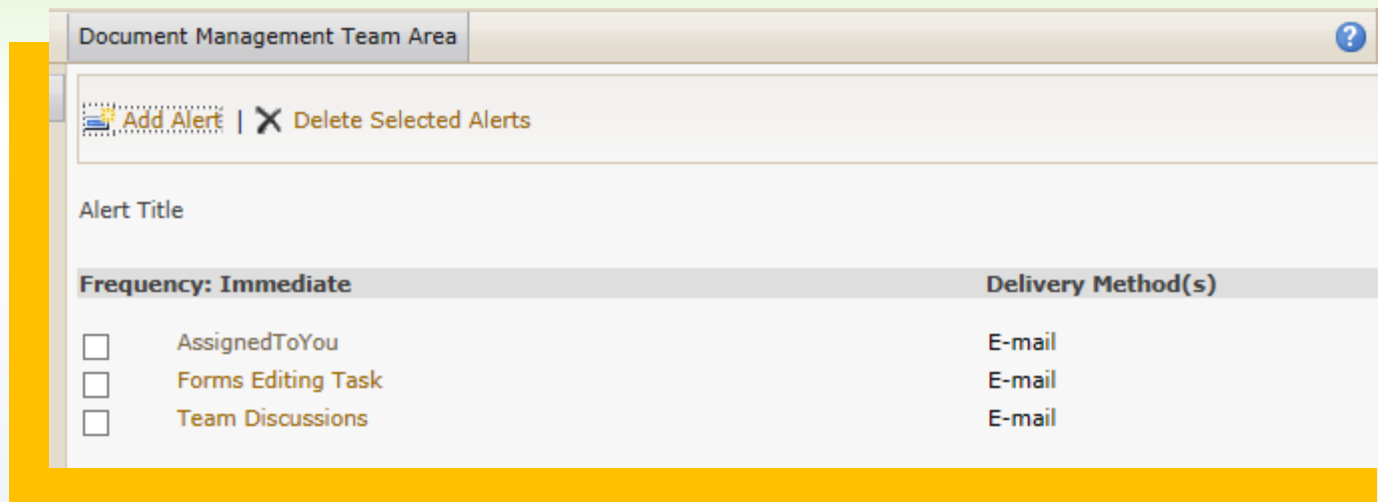
Alerts

To delete or update an alert on a list or library, navigate to the list or library. Under **Library Tools > List (Library)** click the dropdown menu under **Alert Me** and select **Manage My Alerts**.



Alerts

Click the alert name to modify it. To delete an alert, click the checkbox and click **Delete Selected Alert**.



The screenshot shows a web interface for managing alerts. At the top, there is a header bar labeled "Document Management Team Area" with a help icon on the right. Below the header, there is a toolbar with two buttons: "Add Alert" (with a plus icon) and "Delete Selected Alerts" (with an X icon). The main content area is titled "Alert Title" and contains a table with two columns: "Frequency: Immediate" and "Delivery Method(s)". The table lists three alert types, each with a checkbox in the first column and its name in the second column, and the delivery method in the third column.

	Frequency: Immediate	Delivery Method(s)
<input type="checkbox"/>	AssignedToYou	E-mail
<input type="checkbox"/>	Forms Editing Task	E-mail
<input type="checkbox"/>	Team Discussions	E-mail

Questions



HELP AND INFORMATION

Help and Information

- The [SharePoint How-To site](#) has a great deal of information available for training, knowledge, and instruction.
- The [FAQ](#) page has many common questions answered.
- If there are network issues, check your email for an **Employee News** or **LM Information Management** message.
- If you want to have a more intensive, self-guided explanation of SharePoint, I recommend the following beginner-level Lynda.com presentations. Lynda.com is free to use with a Mesa County library card.
 - [SharePoint 2010 Essential Training](#)
 - [Learning SharePoint 2010](#)

Questions

