

Microsoft SharePoint

Editing Documents



Introduction

After documents have been added to a document library you can edit the documents, use the Check In/Check Out feature and view all versions of a document.

If you cannot perform any of these processes you may not have permission and should contact your site owner.

Process Summary

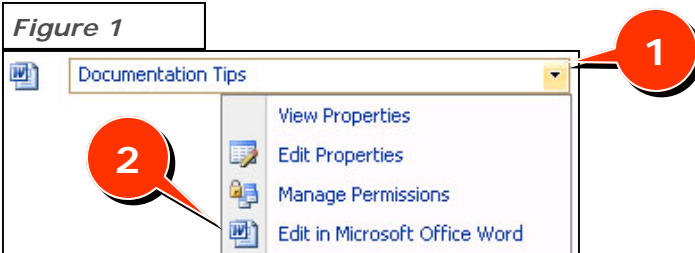
Editing

1. Edit a document
2. Check Out
3. Check In
4. View Versions

Edit a Document

After a document has been added to SharePoint you can edit the document.

1. Click on the **Document Libraries** link.
2. **Hover** your mouse over the document and click on the **Drop down arrow** (Fig 1, 1).
3. Select **Edit in Microsoft Office...** (Fig 1, 2).
4. The file will open in the appropriate software, edit your document and click **Save**.
5. If you are running MS Office 2003 or 2007 you can simply **Close** the application and your changes will be saved to your SharePoint site.



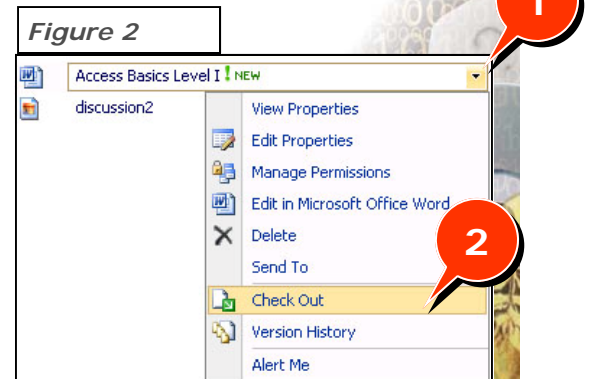
In Microsoft Office 2003 and 2007 the file will open up in the appropriate software and allow you to make changes and click the save button, to update the document in your SharePoint Site. In earlier version you will have to save the document down and upload it again.

Check Out

The Check Out feature lets everyone know that the document is being edited.

When you check out a document a small icon is placed next to the document icon to let users know the document is currently checked out.

1. Open your **SharePoint** site.
2. Click on the **Documents** link.
3. **Hover** your mouse over the document and click on the **Drop down arrow** (Fig 2, 1).
4. Select **Check Out** (Fig 2, 2).
5. Follow the steps in **Edit a Document** to edit the document.



6. **Save** and **Close** the document.
7. Complete the steps in **Check In**.

If you are running Microsoft Office 2003 or 2007 you will be asked when you close the document if you want to check in now. If you select **Yes** add your comments and leave **Keep the document checked out after checking in this version** on **No** and click **Ok**. Your Document will now be checked in and you do not need to complete the Check In process.



Check In

After you have checked out your document, edited it and saved it you can now check your document back in so users will see the new changes.

1. Open your **SharePoint** site.
2. Click on **Project Documents** or **any other documents link**.
3. **Hover** your mouse over the document and click on the **Drop down arrow** (Fig 3, 1).
4. Select **Check In** (Fig 3, 2).
5. Leave **No** selected (Fig 4, 1) for, **Keep the document checked out after checking in this version**.
6. In the **Comments** area (Fig 4, 2) type in any comments you would like to add. This information will be visible to users in the **Version History** area.
7. Click **Ok** (Fig 4, 3).
8. A pop up window will appear telling you, you are about to upload the document, click **Yes**.

Figure 3

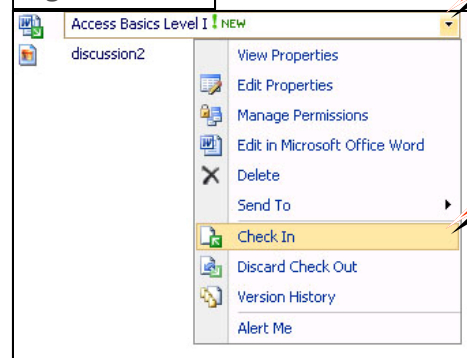
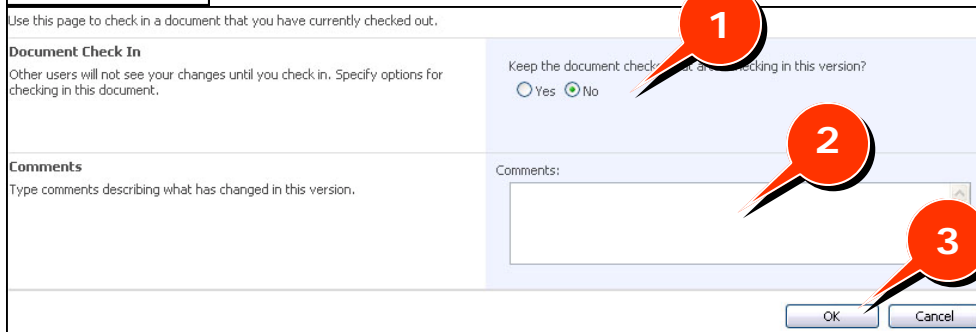


Figure 4

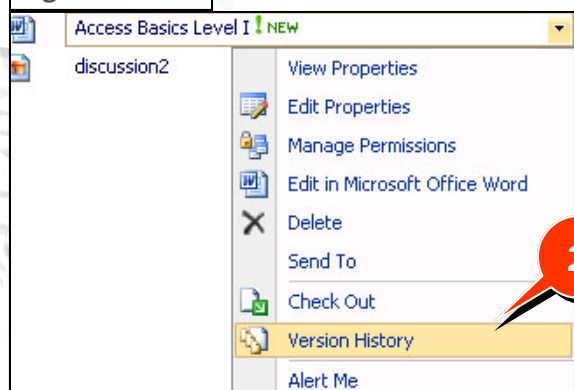


Version History

If your SharePoint site administrator turned versioning on, you will be able to access all the versions that have been added to the site.

1. Open your **SharePoint** site.
2. Click on **Project Documents** or **any other documents link**.
3. **Hover** your mouse over the document and click on the **Drop down arrow** (Fig 5, 1).
4. Select **Version History** (Fig 5, 2).

Figure 5



5. If a numbering system has been assigned by your site owner you will see the number in the **No.** column (Fig 6, 1).
6. The **Modified** column (Fig 6, 2) is the date and time the item was modified.
7. The **Modified By** column (Fig 6, 3) tells you who modified the document.
8. The **Size** column (Fig 6, 4) tells you the size of the document.
9. The **Comments** column (Fig 6, 5) tells you any comments that were added when the document was checked by in.
10. If the document was given a title you will see the **Title** row (Fig 6, 6) below the version.
11. To view a version **hover** your mouse over the **Modified** date and select the **Drop down arrow**.
12. Select **View** to view the file.
13. Select **Delete** to delete the file.
14. Select **Restore** to restore the file.
15. You can **Delete** all versions by clicking **Delete All Version** (Fig 6, 7).

! If you want to **Restore** an old version and the SharePoint site administrator has “require Check Out” enabled you must first **Check Out** the document, **Restore** and then **Check In**. If you are unsure if Check Out is enabled contact your SharePoint site administrator.

Figure 6

Delete All Versions

No. ↓	Modified	Modified By	Size	Comments
7.0	4/19/2007 11:27 AM	Halstead, Patricia	29.5 KB	
6.0	4/19/2007 11:16 AM	Halstead, Patricia	30 KB	Leve II has been added.
5.0	4/19/2007 11:16 AM	Halstead, Patricia	30.5 KB	Updated last section
4.0	4/19/2007 11:16 AM	Halstead, Patricia	30.5 KB	Updated last section
Title		Access Basics Level I & II		
3.0	4/19/2007 11:12 AM	Halstead, Patricia	30 KB	Updated last section
2.0	4/19/2007 11:12 AM	Halstead, Patricia	30 KB	
1.0	4/19/2007 11:11 AM	Halstead, Patricia	27 KB	
Title		Access Basics Level I		