

Martin and Associates presents:

Microsoft® Office SharePoint® Server 2007 Training

SharePoint document libraries I: Introduction to sharing files

Course contents

- Overview: It's important to learn to share
- Lesson 1: Why use document libraries?
- Lesson 2: How to add and edit files

Each lesson concludes with a short set of questions to test your understanding of the material.

SharePoint document libraries I:
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Overview: It's important to learn to share



Does your company use a Microsoft Windows® SharePoint® Services 3.0 site, or Microsoft Office SharePoint Server 2007?

If so, it's essential that you know how to share files by using SharePoint document libraries.

This course will start you off on the right foot.

SharePoint document libraries I:
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Course goals

- See how valuable a document library can be to you and your coworkers.
- Make files available to others by adding them to a document library.
- Edit and save files in a document library.
- Discover what happens when two people try to edit a file at the same time, and know how to handle that.

SharePoint document libraries I:
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Lesson 1

Why document libraries?

Why document libraries?



Sharing files with others is essential to getting things done nowadays.

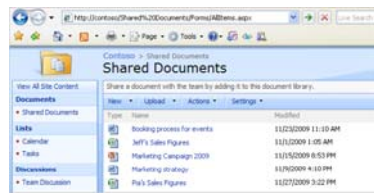
But just how should you share files?

You could e-mail them to people or put them on a network folder somewhere.

But if your company has a Windows SharePoint Services 3.0 site or Microsoft Office SharePoint Server 2007, the best way to share files is to use a **document library**.

SharePoint document libraries I:
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What is a document library?



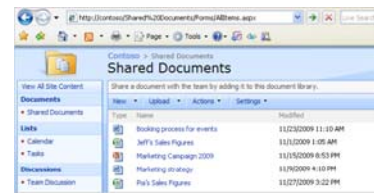
A SharePoint document library is a place on a site where you can create, collect, and update files with others.

In this example, employees at Contoso Pharmaceuticals are using a document library called "Shared Documents."

They have added files to the library, and now people can make changes to them.

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What is a document library?



A SharePoint document library is a place on a site where you can create, collect, and update files with others.

Those changes will be stored in the library — not on their own computers.

And, because the library is on a Web site, other people can easily access the files using a Web browser, provided they have the permissions to do so.

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Good reasons to use a library



You might be thinking, "Why not just e-mail a file to my colleagues or use a network folder to share files?"

Because SharePoint document libraries provide more control.

There are many ways they do this:

- **Checkout:** You can check out a file to reserve it for your use so that others cannot change it while you are working on it.
- **Versions:** A library can also be set up to store previous versions for archiving purposes.

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Good reasons to use a library



You might be thinking, "Why not just e-mail a file to my colleagues or use a network folder to share files?"

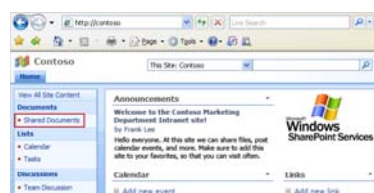
Because SharePoint document libraries provide more control.

There are many ways they do this:

- **Alerts:** You can set up e-mail alerts so that you are notified if a file is changed by someone else.
- **Search:** Libraries can also be set up so that they are searchable.

SharePoint document libraries I:
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Where to get a document library



So where do you get a document library?

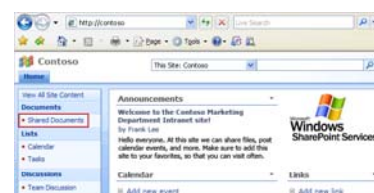
On a Windows SharePoint Services site.

And where do you get a Windows SharePoint Services site?

Your IT department or someone at your company will send you the Web address, or URL, of the site so that you can access it in your Web browser.

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Where to get a document library



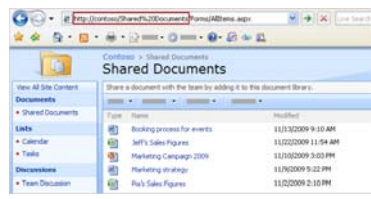
Important: The site shown here is an example of a site you'd find on either Windows SharePoint Services 3.0 or Microsoft Office SharePoint Server 2007.

This course addresses only these versions. If you have an older version, it may look and function differently from the examples in this course.

How do you know which version you have? Ask the person in charge of your site.

SharePoint document libraries I:
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The URL is important



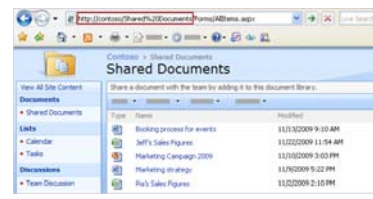
Once you've found the document library you want to work with, you'll want to become familiar with the URL of the library.

The URL of the library is at the top, in the address bar. And you only need to become familiar with everything before "Forms/AllItems.aspx."

So if this example were your library, you would need to be familiar with "http://contoso/shared/%20Documents." The "percent twenty" represents a space in a URL.

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The URL is important



Once you've found the document library you want to work with, you'll want to become familiar with the URL of the library.

Add this URL to your Web browser favorites for quick and easy access. Eventually, you may even have it memorized because you'll use it often to access files.

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Test 1, question 1

Where can you get a document library? (Pick one answer.)

1. You can get one inside your copy of Microsoft Office Word 2007, Microsoft Office Excel® 2007, or Microsoft Office PowerPoint® 2007.
2. You can get them only if your company has Microsoft Office SharePoint Server.
3. You can get one on a Microsoft Windows SharePoint Services site or a Microsoft Office SharePoint Server site.
4. You can get them on any network server available to you.

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Test 1, question 1: Answer

You can get one on a Microsoft Windows SharePoint Services site or a Microsoft Office SharePoint Server site.

This course specifically addresses libraries in Windows SharePoint Services 3.0 and Microsoft Office SharePoint Server 2007 sites.

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Test 1, question 2

How can you find out which version of Windows SharePoint Services or Office SharePoint Server your site uses? (Pick one answer.)

1. Click the **Help** menu, and then click **About**.
2. Ask your IT department or the person who set up the site for you.
3. If you see a link called **Shared Documents** on the left, you know you have version 3.0.
4. Look at the actual server machine, and the version number will be stamped on the outside cover.

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Test 1, question 2: Answer

Ask your IT department or the person who set up the site for you.

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Test 1, question 3

A SharePoint document library is which of the following?
(Pick one answer.)

1. A collection of files on your computer that you organize.
2. A group of documents attached to an e-mail message.
3. A place on a SharePoint site where you can add just Word documents, and not Excel or PowerPoint files.
4. A place on a SharePoint site where you can create, collect, and update files with others.

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Test 1, question 3: Answer

A place on a SharePoint site where you can create, collect, and update files with others.

SharePoint document libraries I:
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Lesson 2

How to add and edit files

How to add and edit files



Wondering how to actually work with a document library?

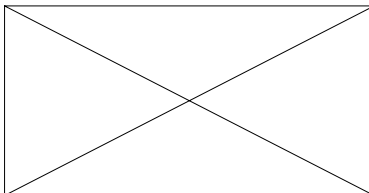
You're in the right place.

This lesson will show you how to add and edit library files by using Word, Excel, and PowerPoint 2007.

You'll also learn what happens when two people try to edit a file at the same time, and how to handle that.

SharePoint document libraries I:
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How to save a file to a library



Here's a library with no files. You can change that.

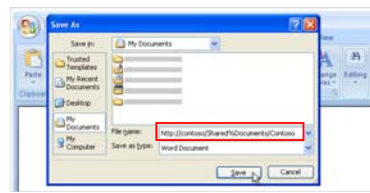
Adding a file to a library is similar to the way you save files to your computer.

Animation: Right-click, and click **Play**.

But instead of specifying a location on your computer when you save the file, you type in the URL for your library — that is, everything before "Forms/AllItems.aspx."

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How to save a file to a library

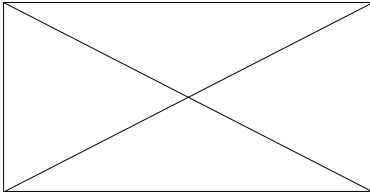


Adding a file to a library is similar to the way you save files to your computer.

But instead of specifying a location on your computer when you save the file, you type in the URL for your library — that is, everything before "Forms/AllItems.aspx."

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How to upload files to a library



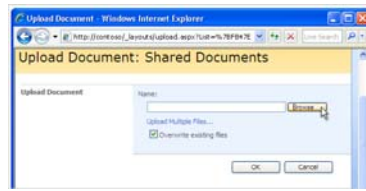
What if you already have your files saved to your computer and now you just need to get them up to the library somehow?

Animation: Right-click, and click **Play**.

To do that, you go to the document library in your Web browser and then click **Upload**, as the animation demonstrates.

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How to upload files to a library



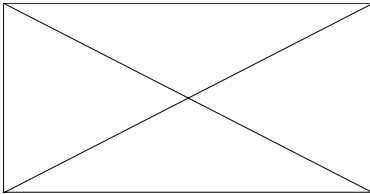
What if you already have your files saved to your computer and now you just need to get them up to the library somehow?

To do that, you go to the document library in your Web browser and then click **Upload**.

Then, as the picture shows, you can click **Browse** to locate the file on your hard disk.

SharePoint document libraries I:
Introduction to sharing files

How to edit a file



Once your Word, Excel, and PowerPoint files are there, what do you do with them?

For example, how might you edit this marketing strategy document?

Animation: Right-click, and click **Play**.

When you need to work with a file and make changes, you edit the file. Click **Play** to see how to do this in Word 2007, but know that the process is the same in Excel 2007 and PowerPoint 2007.

SharePoint document libraries I:
Introduction to sharing files

How to edit a file



Once your Word, Excel, and PowerPoint files are there, what do you do with them?

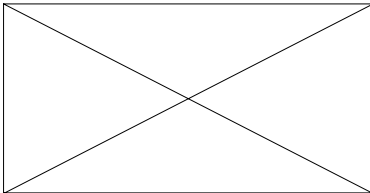
For example, how might you edit this marketing strategy document?

When you need to work with a file and make changes, you edit the file.

The picture shows what you'll see when you do this in Word 2007; click **Edit** to make changes to the file. (The process is the same in Excel 2007 and PowerPoint 2007.)

SharePoint document libraries I:
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People can edit, one at a time



With a library, when people edit the file one at a time, true collaboration takes place.

Animation: Right-click, and click **Play**.

Each person can contribute to the file in their own time. There's no need for extra meetings, printing extra copies, walking the halls to solicit revisions, and so on.

SharePoint document libraries I:
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People can edit, one at a time



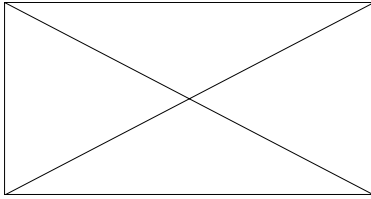
With a library, when people edit the file one at a time, true collaboration takes place.

Each person can contribute to the file in their own time. There's no need for extra meetings, printing extra copies, walking about the halls for revisions, and so on.

For example, if Frank and Ellen both need to work on a marketing strategy document, they take turns editing it, one at a time.

SharePoint document libraries I:
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When you don't take turns



What happens when you don't take turns? The first one who edits the file will lock out the other person.

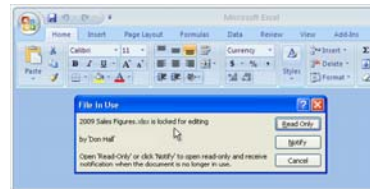
In other words, two people cannot edit the same file at the same time.

Animation: Right-click, and click **Play**.

In this animation, Don and Amy will enter their sales figures in the 2009 Sales Figures spreadsheet. Don will edit the file first. But when Amy tries to edit the file at the same time, she will get a **File in Use** message. Once Don closes the file, she'll be able to edit it.

SharePoint document libraries I:
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When you don't take turns



What happens when you don't take turns? The first one who edits the file will lock out the other person.

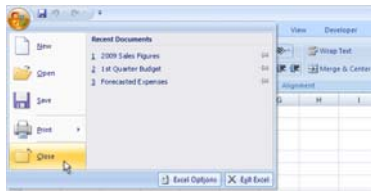
In other words, two people cannot edit the same file at the same time.

This picture shows what happens when one person tries to edit the file at the same time as another person.

A **File in Use** message appears. Once Don Hall closes the file, the file will be editable again.

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Avoid locking the file by closing it



In the previous section, you saw how one person can lock others out of a file if that person has it open.

The way to unlock the file is to close it.

This is an important step to remember. If you don't close the file, confusion can result.

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When you don't close a file



Look at what's going on here with Dave and Katie.

Dave is editing a spreadsheet from a library. A few seconds later, Katie tries to do that too.

But since two people can't work on the file at the same time, Katie gets the **File in Use** message.

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When you don't close a file



If Dave closes the file, it will get unlocked. But what happens if he doesn't close it? What if he goes to lunch for two hours?

Well, he can keep Katie locked out only for so long.

If he's using Microsoft Windows XP, he'll lock her out for 15 minutes after the last time he saves. And if he's using Windows Vista®, he'll lock her out for 60 minutes.

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When you don't close a file



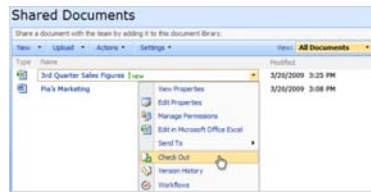
When those times are up and he doesn't save, Katie can edit and save her changes to the library. If Dave still has the file open and makes changes, he can override Katie's.

Then Katie will be confused because her changes won't be seen. You might be confused just trying to puzzle this all out.

One way to prevent confusion is to use checkout before you edit the file. Do this when you think your changes will take longer than 15 minutes.

SharePoint document libraries I:
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How to check out a file



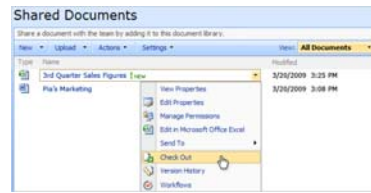
To check out a file, you do something extra before you edit the file.

You place your pointer over the file name, click the down arrow that appears, and then click **Check Out**.

This will reserve the file for only you to work on so that other people cannot make changes.

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How to check out a file



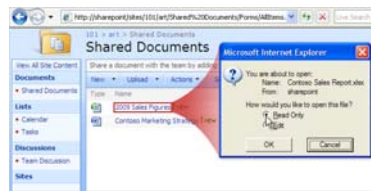
Should you always check out files? Not necessarily.

If you need to make a quick change that you know will take only a few minutes, then checkout is not necessary.

But if there's a chance that your changes will take longer than 15 minutes, we recommend checking out the file before editing it.

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Avoid locking the file unnecessarily



In addition to closing the file when you are done, there's another way to avoid locking files: Open them as **Read Only**.

You should do this when you don't need to change the file at all but you do need to read it or refer to it.

When the file opens, you won't be able to make changes, of course. However, others will still be able to edit the file when you have it open as Read Only, so you won't lock them out.

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Test 2, question 1

Your library URL is the following:
<http://sharepoint/Team%20Files/Forms/AllItems.aspx>. What portion of it do you need in order to save it by using Word, Excel, or PowerPoint 2007? (Pick one answer.)

1. http://sharepoint/upload_files_here
2. <http://sharepoint/Team%20Files/>
3. <http://sharepoint/Team%20Files/Forms/>
4. <http://sharepoint/>

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Test 2, question 1: Answer

<http://sharepoint/Team%20Files/>

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Test 2, question 2

When working with a document library, how do you edit a file for use in Word, Excel, or PowerPoint 2007? (Pick one answer.)

1. Click the name of the file, and then click the **Edit** option.
2. Click the name of the file, and then click **Read Only**.
3. Place your pointer over the name of the file, click the menu, and then click **Check Out**.
4. Place your pointer over the name of the file, click the menu, and then click **Edit Properties**.

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Test 2, question 2: Answer

Click the name of the file, and then click the **Edit** option.

Test 2, question 3

Shellie edits a file in a SharePoint library. It is still open on her computer. A few seconds later, Gwyneth tries to edit the file. What will happen? (Pick one answer.)

1. Gwyneth will be able to make changes and save them to the library at the same time as Shellie.
2. Gwyneth will be able to make changes, but Shellie will not.
3. Gwyneth will get a "File in use" message and will be prevented from seeing the file.
4. Gwyneth will get a "File in use" message and will be prevented from making changes, but she will be able to see the file.

Test 2, question 3: Answer

Gwyneth will get a "File in use" message and will be prevented from making changes, but she will be able to see the file.