



SharePoint 2013 Guidance

Table of Contents

SharePoint Guidance.....	3
1. Introduction	3
2. Uploading Documents.....	3
2.1. How do I upload a single document to SharePoint?.....	3
2.2. Uploading multiple documents to SharePoint.....	8
3. Checking Documents in.....	11
4. How do I know if someone else has uploaded a document on SharePoint?.....	13
5. How do I open and amend a SharePoint document?	14
6. How do I delete a document from SharePoint?	15
6.1. Deleting Documents – Method 1	15
6.2. Deleting Documents – Method 2.....	16
7. Further assistance	17

SharePoint Guidance

1. Introduction

This Guidance document is part of [the Operations Manual](#) and applies to the 2013 version of SharePoint. If you require help on using SharePoint 2010, the guide to use can be found [here](#).

For more information on how SharePoint is used at UWE, please read section 1.5 of the Operations Manual.

2. Uploading Documents

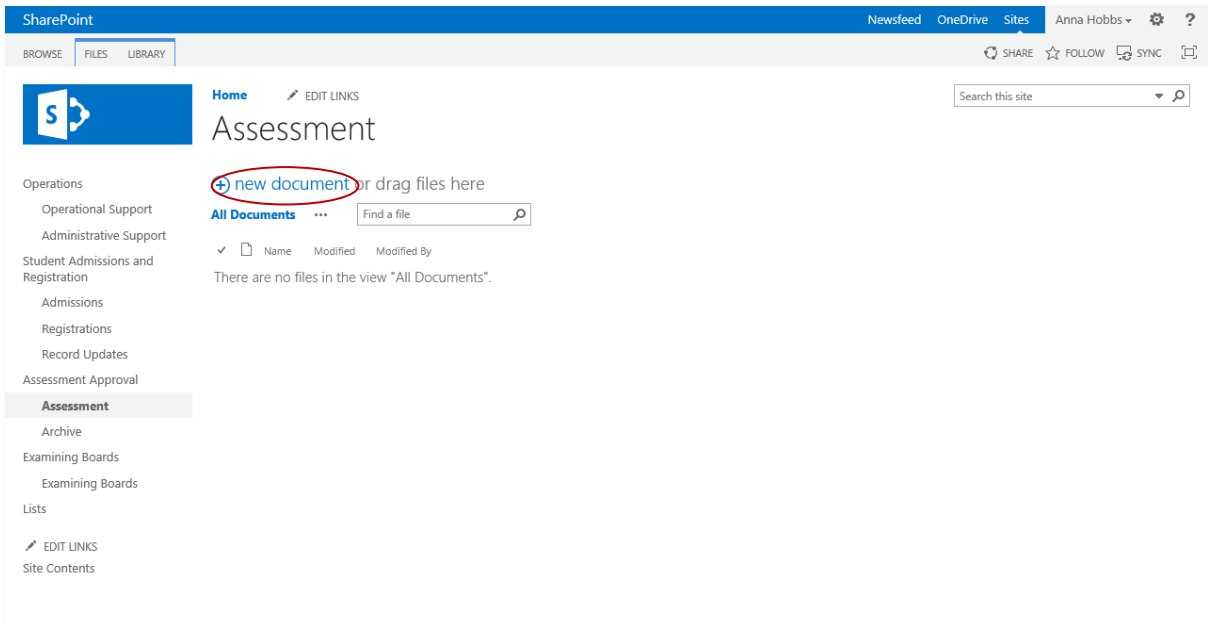
2.1. How do I upload a single document to SharePoint?

Uploading a document to SharePoint is similar to adding an attachment to an email.

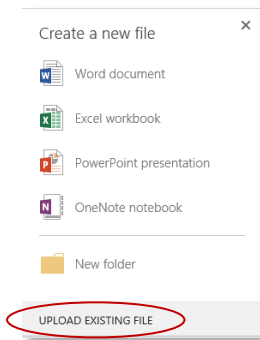
After you have accessed the area where the document should be stored you can choose one of three ways to add a document:

2.1.1. Uploading a single document – method 1

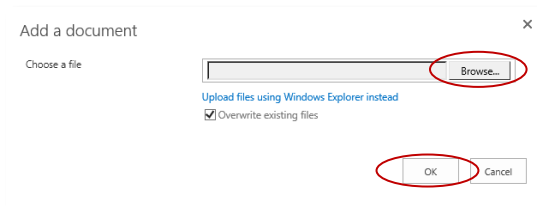
The first way is to click on the “+ new document” text that appears on the screen.



Once you have clicked on “+ new document” the box below will appear in the middle of the screen.



Click “UPLOAD EXISTING FILE” and locate the document that you want to upload to the area in your computer. Once you have selected the document click “OK”.



A box similar to the one below might appear requiring you to fill in some information about the document.

The information fields with a red star beside them for example, “Academic Year” are compulsory. You need to fill these boxes in before the document can be successfully uploaded. Some of the boxes allow you to select from pre-populated menus. Others require you to type in text. When typing in text please use language that can be understood by staff at both organisations.

Once you have filled in all of the compulsory information fields click on “Check In” in the top left hand corner of the box (please see section 3 for more information on “checking documents in”).

Assessment - test.docx

EDIT

Check In Cancel Paste Cut Copy Delete Item

Commit Clipboard Actions

The document was uploaded successfully and is checked out to you. Check that the fields below are correct and that all required fields are filled out. The file will not be accessible to other users until you check in.

Name * test .docx

Title

Academic Year * 2018/19

Programme Name *

Document Type *

Intake *

Jan
May
Sept

Add >

< Remove

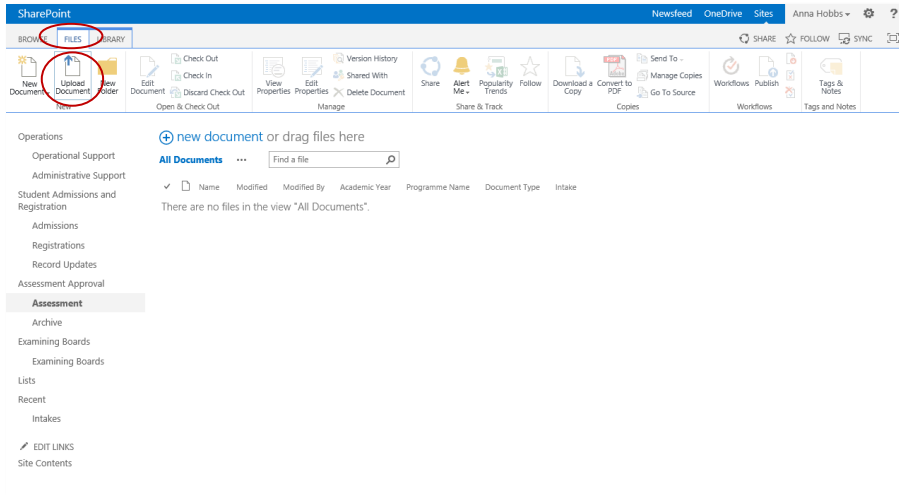
Created at 01/08/2018 03:44 PM by Anna Hobbs
Last modified at 01/08/2018 03:44 PM by Anna Hobbs

Save Cancel

Your document has now been uploaded to SharePoint.

2.1.2. Uploading a single document – Method 2

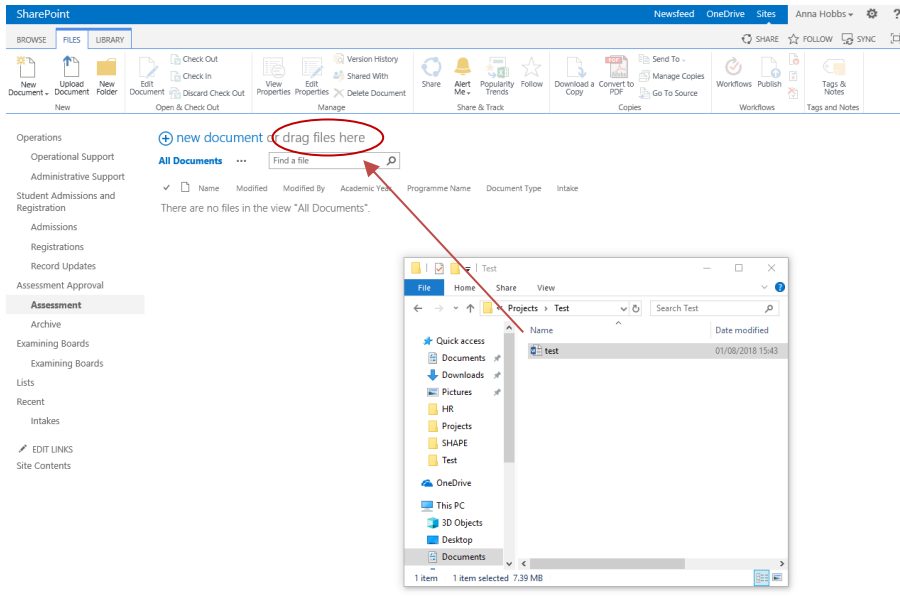
The second way to upload a document to SharePoint is to click on the “FILES” tab at the top of the screen and then “Upload Document”.



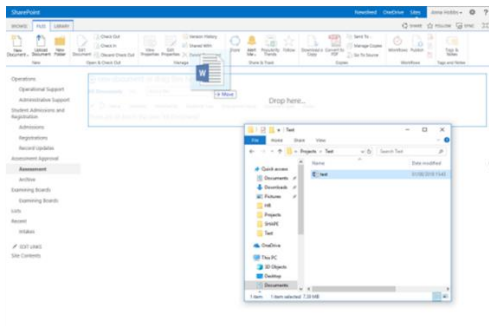
Follow the steps described in Section 2.1.1.

2.1.3. Uploading a single document – Method 3

Finally, you can also drag a chosen document from your computer to the area under the main toolbar shown below.



SharePoint will prompt you when to drop the document:

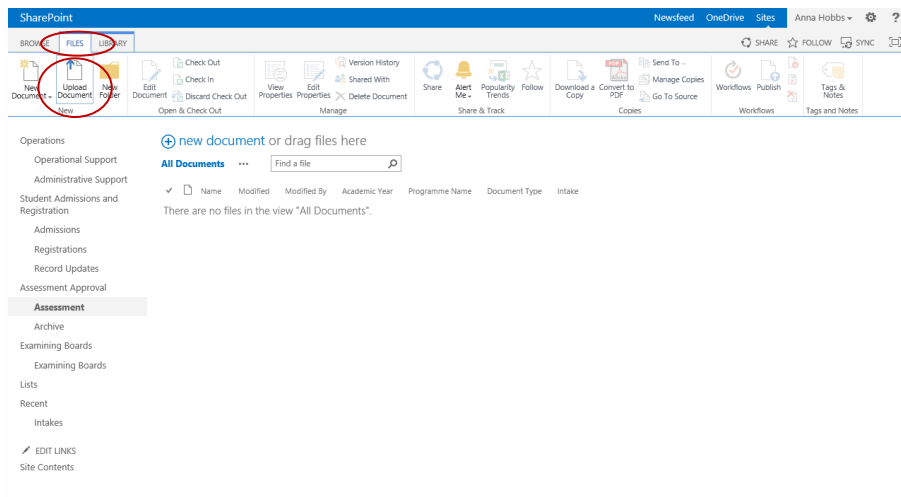


If you see a green arrow next to the file icon on your document, you will need to "check in" the new document. Please follow the steps described in section 3.

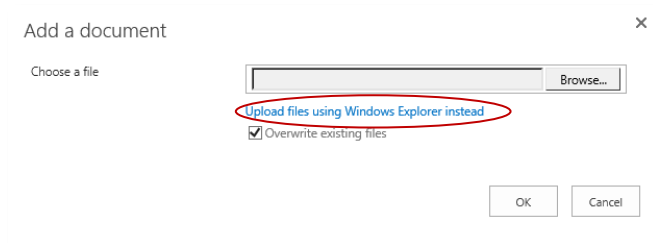
2.2. Uploading multiple documents to SharePoint

If you wish to upload multiple documents, you need to open SharePoint in Internet Explorer.

Access the area where you want to store the document and click on the “FILES” tab from the top toolbar and select “Upload Document”:

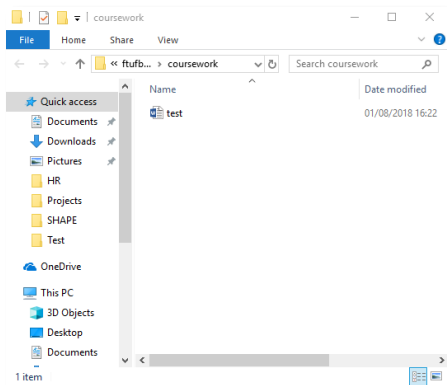


Once you have clicked on “Upload Document the box below will appear in the middle of the screen.



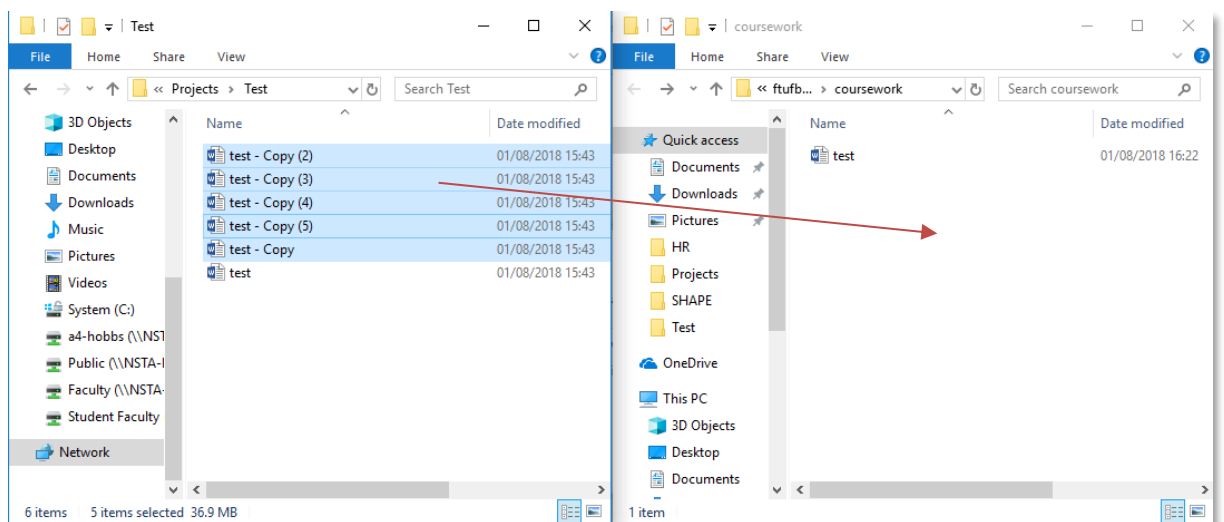
Select “Upload files using Windows Explorer instead”.

SharePoint will display all files in the current library as if they were located on your computer:

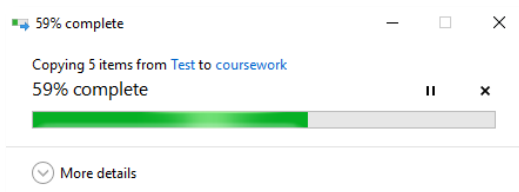


Open your files in a separate window. Locate, select and copy the documents that you wish to upload to SharePoint.

You can also drag your documents from one window to the other (a “+” sign under the document will confirm that a copy is made):



A similar window may appear:



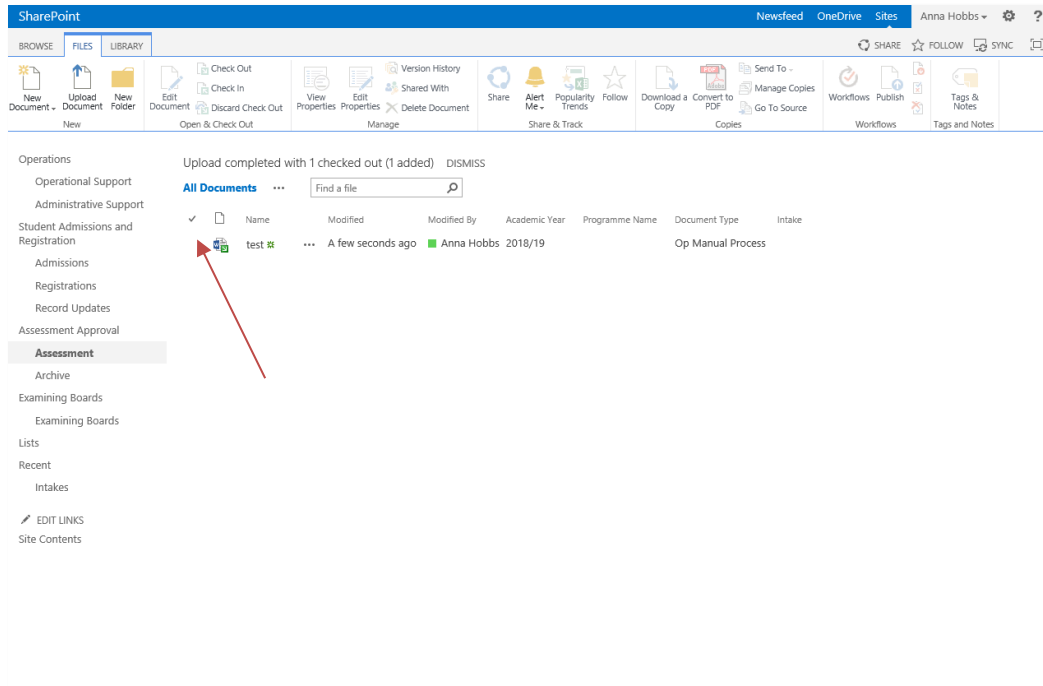
Close the Explorer window and refresh the SharePoint page. Your documents have now been uploaded.

If your documents need to be checked in, please follow the steps described in section 3.

3. Checking Documents in

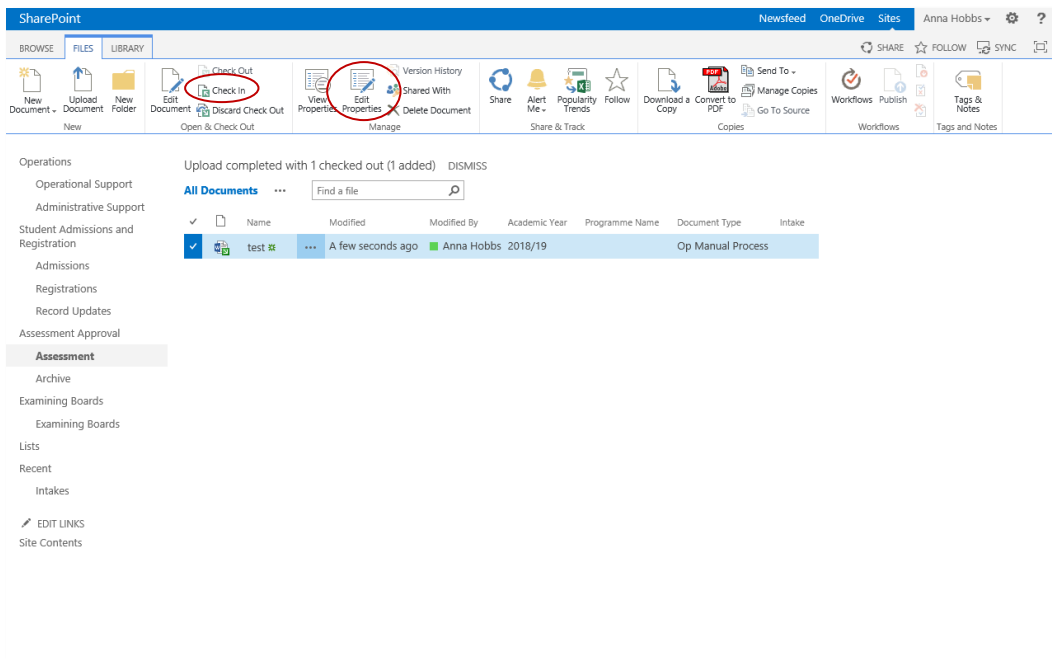
If your document icon has a green arrow as shown in the image below, it means you will need to check it in. If a document is not checked-in, no other user will be able to see it.

Hover over the document and click where the arrow points to select the document:



When your document is highlighted in blue select “Edit Properties” (as shown below) and you will be asked to fill in the required document information as explained earlier. Save your details.

Select your document again to highlight it and press “Check in”.



SharePoint will ask if you wish to retain your check out, please select “No” and press “OK” .

Your document has been successfully uploaded and checked in.

4. How do I know if someone else has uploaded a document on SharePoint?

If you want to know if someone else has uploaded a document to the SharePoint site, you can set up “User Alerts”. If you set up “User Alerts” SharePoint will automatically send you an email to let you know when documents have been added or amended.

To find out how to set up “User Alerts” please click on the link below and follow the guidance;

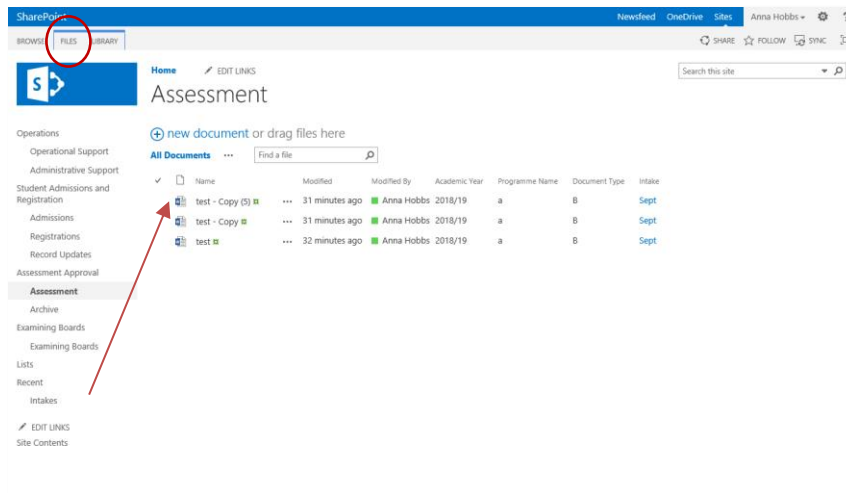
[SharePoint 2013 user alert guidance](#)

5. How do I open and amend a SharePoint document?

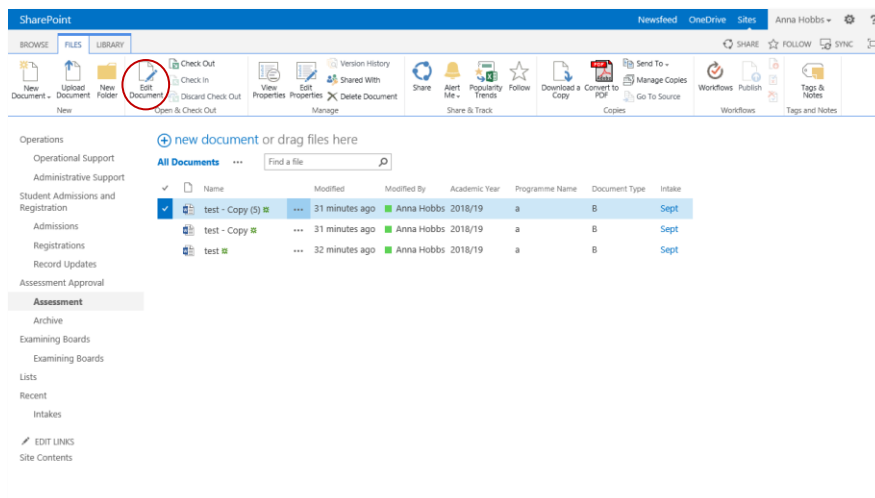
Once you have accessed the area on SharePoint where the document you want to open is stored click on the document name.

Selecting the “FILES” tab from the top toolbar.

Hover over the document and click where arrow points to select the document(s):



When your chosen document is highlighted in blue, select “Edit Document” from the top toolbar:



The document will now open and you will be able to update/amend it in the usual way.

Once you have finished working on the document don't forget to save it. It will automatically save to the SharePoint site.

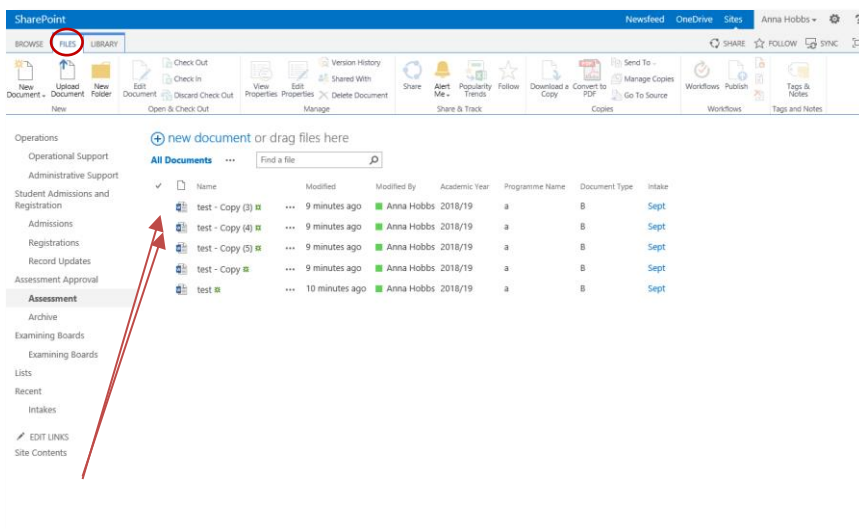
6. How do I delete a document from SharePoint?

If you upload the wrong document(s) to SharePoint you can delete it/them in two ways. Please remember that your document(s) can be recovered up to 30 days after deleting.

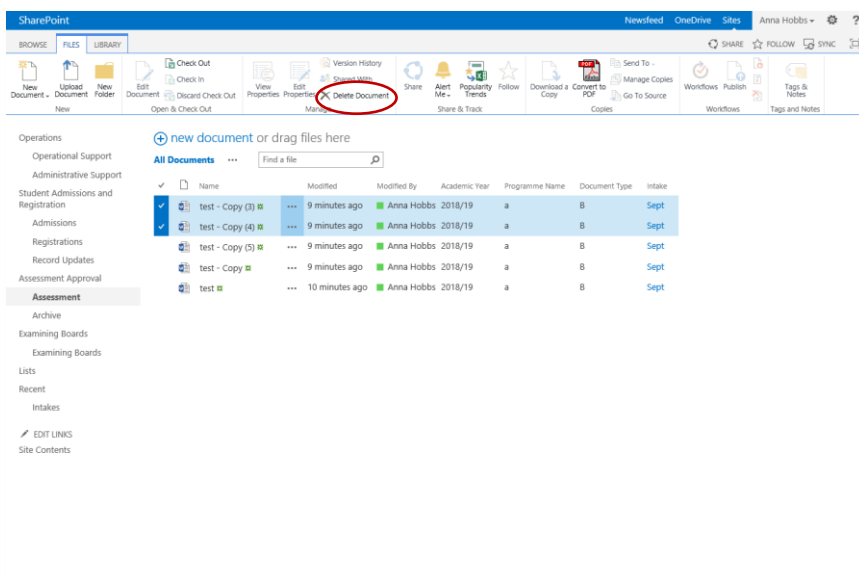
6.1. Deleting Documents – Method 1

The first way to delete document(s) is by selecting the “FILES” tab from the top toolbar.

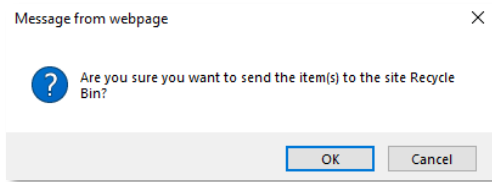
Hover over the document and click where arrow points to select the document(s):



When your chosen documents are highlighted in blue, select “Delete Document” from the top toolbar:

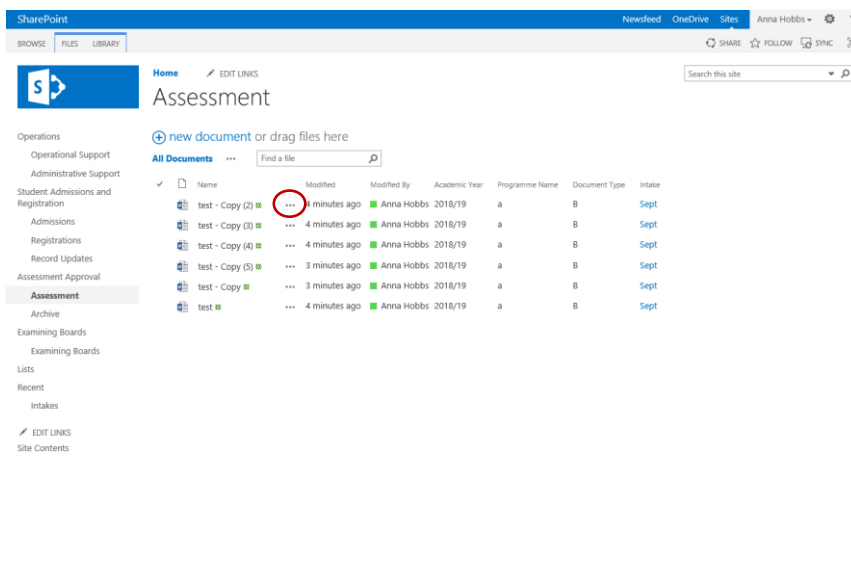


The following message will appear. Click “Ok” and you will have successfully deleted the document.

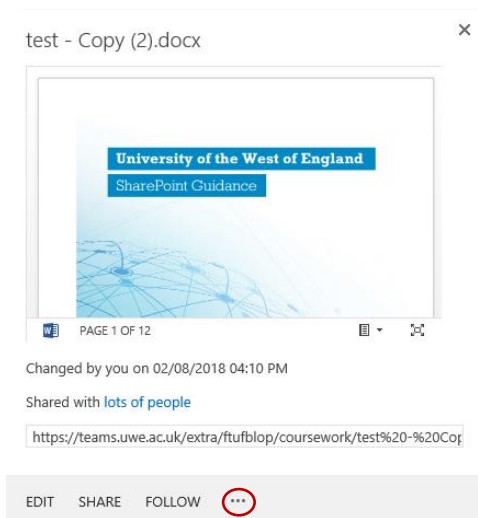


6.2. Deleting Documents – Method 2

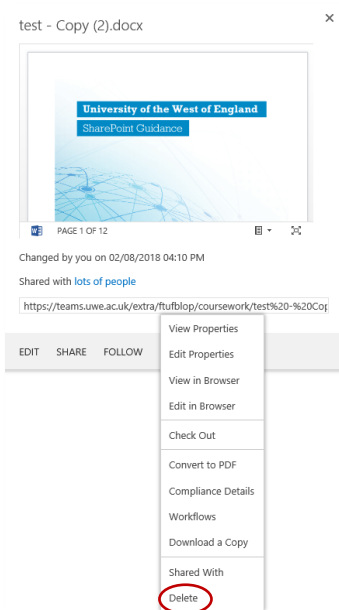
The second way to delete documents is by using the three dot sign next to the document name:



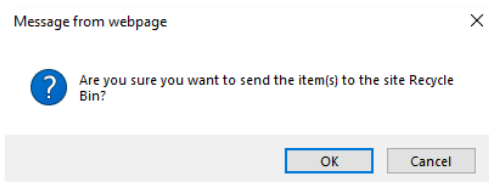
A separate window will open. Click on the three dots at the bottom of the window to access a menu.



Select “Delete” from the bottom of the menu.



The following message will appear. Click “Ok” and you will have successfully deleted the document.



7. Further assistance

If you would like to learn more about SharePoint 2013, you can find helpful articles [on-line](#) or tutorial videos on [Lynda.com / LinkedIn Learning](#)

You can also e-mail Partnerships.SAT@uwe.ac.uk if you experience problems with the tasks described in this guide.