

NCI Technologies presents:

Microsoft® Office  
SharePoint® Server 2007  
Training

**SharePoint document libraries II:  
All about checkout**

# Course contents

- Overview: Check this out
- How to check out and check in files

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

# Overview: Check this out



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

If so, you'll want to learn about checking out a file so that only you can work on it.

This course will also teach you how to check in files, along with other helpful details.

# Course goals

- Learn why you'd want to check out and check in a file.
- Check out and check in a file.
- Understand where a file is stored when you check it out.

# Lesson

How to check out and  
check in files

# How to check out and check in files



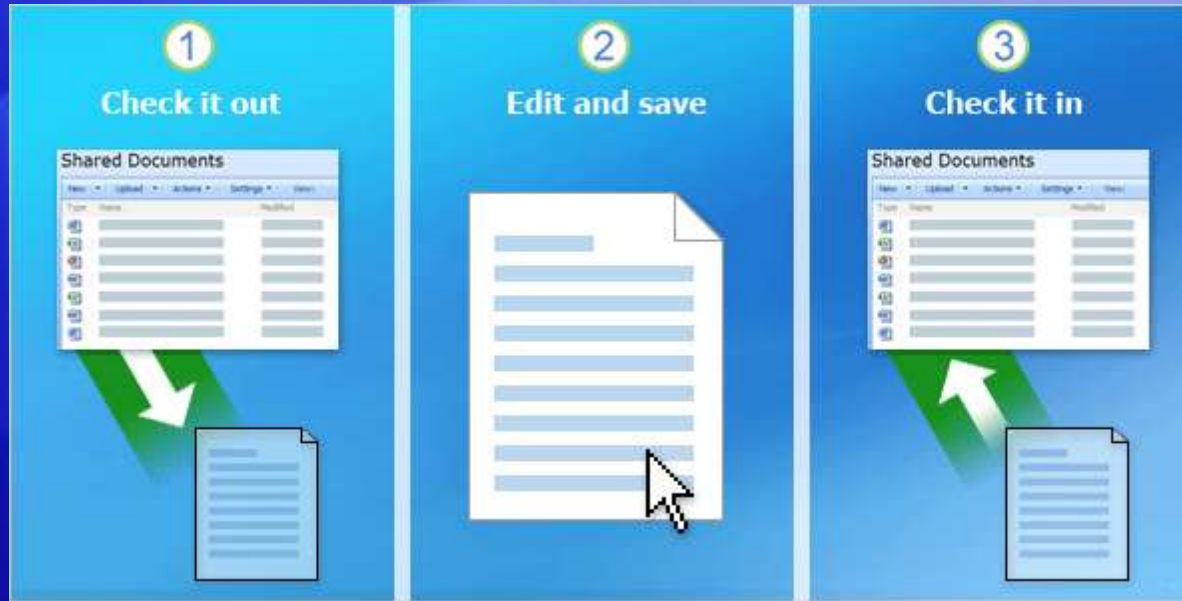
When coworkers get used to using a SharePoint library, it turns into a thriving hub of activity.

And things may get confusing if several people try to edit a single file at one time.

To edit a file, you can always click the file name and choose **Edit**. But in busy situations, if you need to work on a file for more than 15 minutes, it's best that you check out the file beforehand.

This will reserve it for your use so that others cannot change it while you're working on it.

# The overall process

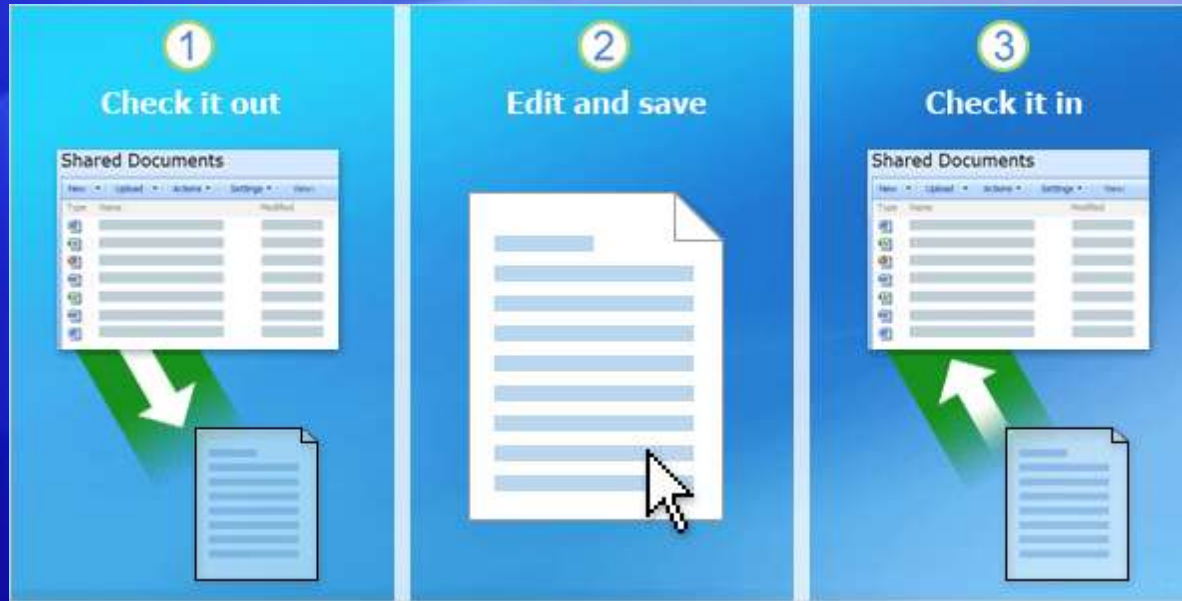


How does checking out a file for use in Microsoft Office Word 2007, Microsoft Office Excel<sup>®</sup> 2007, or Microsoft Office PowerPoint<sup>®</sup> 2007 work?

Here's a general explanation:

- 1 Check out the file.** At this point, the file is reserved for only you to work on.
- 2 Edit and save.** You edit the file by clicking its file name in the library. When the file opens, you work on it and save as many times as you need to.

# The overall process



How does checking out a file for use in Microsoft Office Word 2007, Microsoft Office Excel<sup>®</sup> 2007, or Microsoft Office PowerPoint<sup>®</sup> 2007 work?

Here's a general explanation:

- 3 Check in the file.** When you check in the file, others will see your changes and will be able to edit the file.

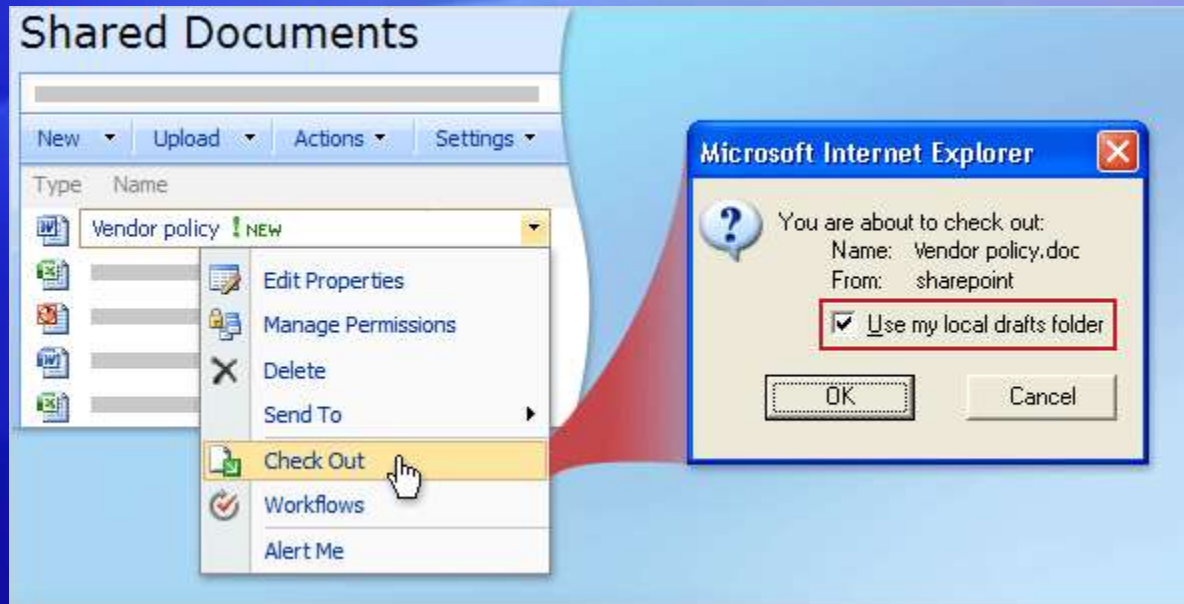
# How to check out and check in a file



To check out a file for use in Word 2007, Excel 2007, or PowerPoint 2007, you place your pointer over the file name, click the down arrow that appears, and then click **Check Out**.

Then you edit the file by clicking its name. When you close the file, you'll be prompted to check it in, as shown here.

# Where the file is located



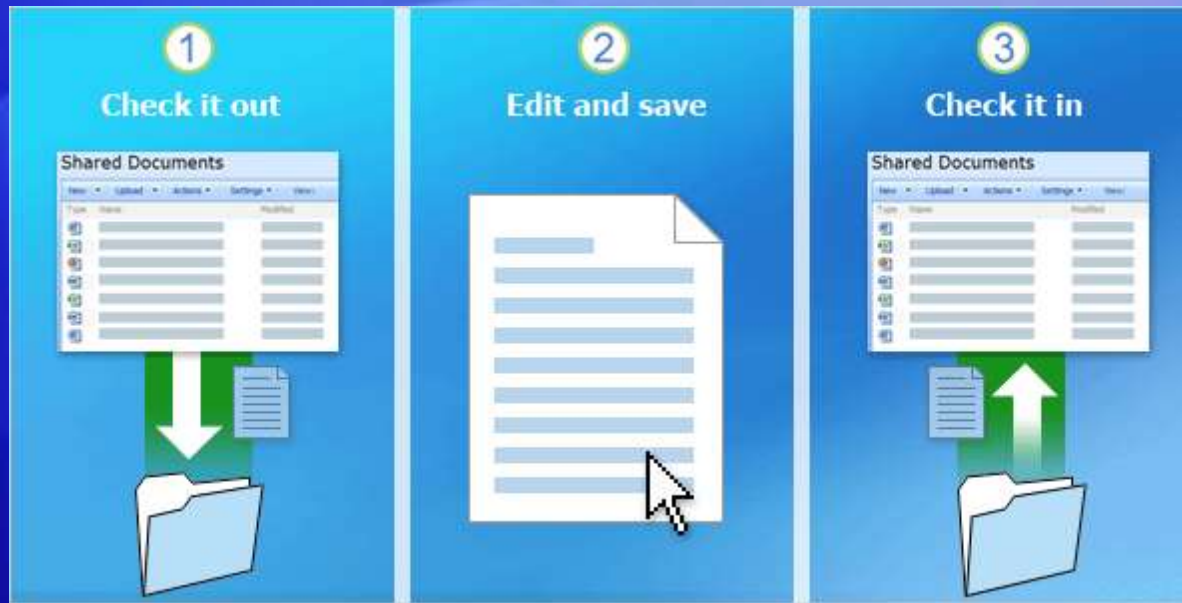
So where is the file located when it's checked out?

If you select the **Use my local drafts folder** check box, shown here, the file will be stored on your *computer*.

If you do not select this check box, the file will remain on the *server* while you have it checked out.

In either case, the file will be reserved for your use, and your changes will *not* be seen by others until you check it in.

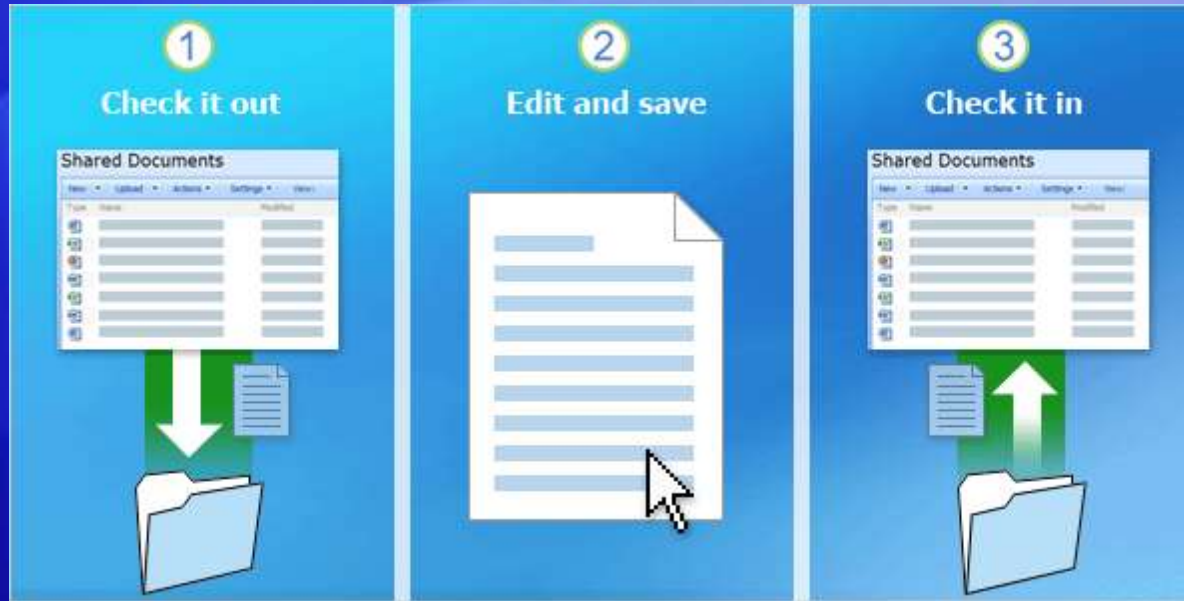
# Checkout using the SharePoint Drafts folder



Here's what the process is like when you select the **Use my local drafts folder** check box.

- 1 When you check out the file, it will be stored in a folder on your computer. If you're using Microsoft Windows XP, it is checked out to My Documents\My SharePoint Drafts. And in Windows Vista®, it's checked out to Documents\SharePoint Drafts.

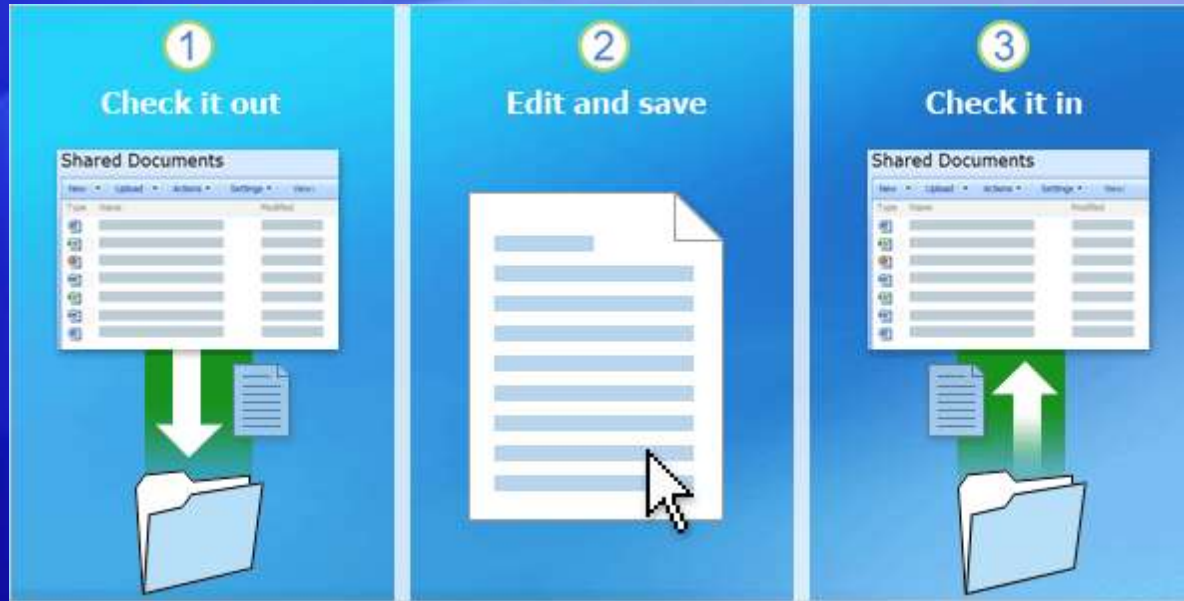
# Checkout using the SharePoint Drafts folder



Here's what the process is like when you select the **Use my local drafts folder** check box.

- ② When you edit and save the file, your changes will get saved to your Drafts folder, and not to the library.
- ③ When you check in the file, others will then see your changes. And the file will be available for people to work on.

# Checkout using the SharePoint Drafts folder



Here's what the process is like when you select the **Use my local drafts folder** check box.

In short, the recommended route is to use the **Use my local drafts** folder check box because it allows you to travel with the file, and it makes saving the file a lot faster.

# For Windows Vista users

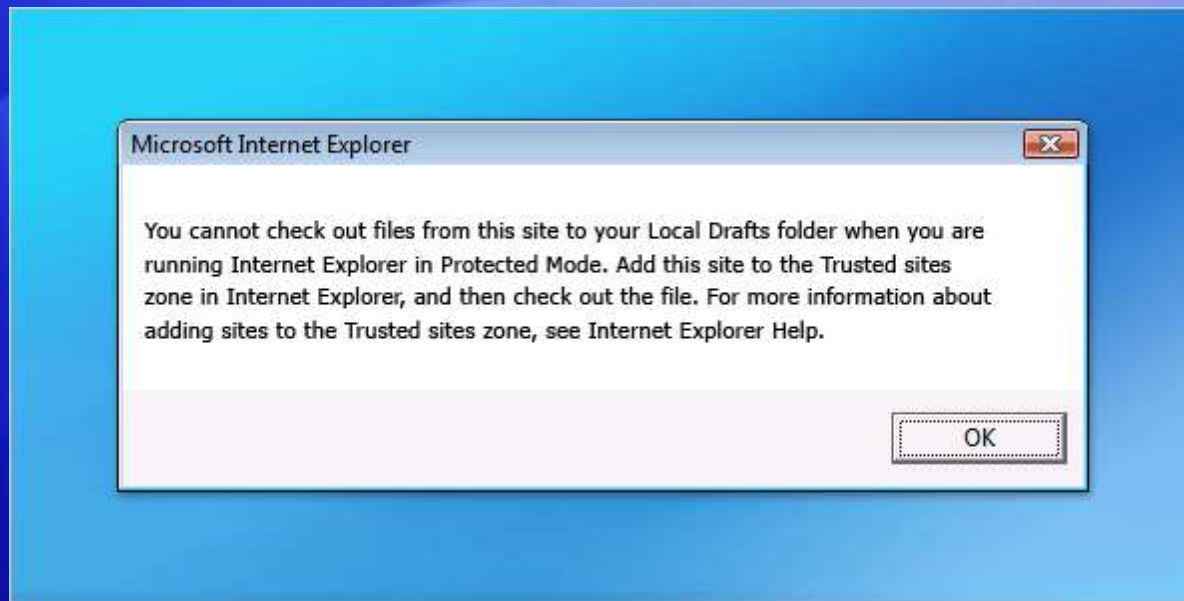


One thing for Windows Vista users to be aware of: If you try to select the **Use my local drafts folder** check box, you might see the error message shown here.

You can click **OK** and still check out the file. But it won't be checked out to your SharePoint Drafts folder.

This means you don't get the benefit of editing the file offline. Instead, you need to have a constant Internet connection to the library in order to edit the file.

# For Windows Vista users

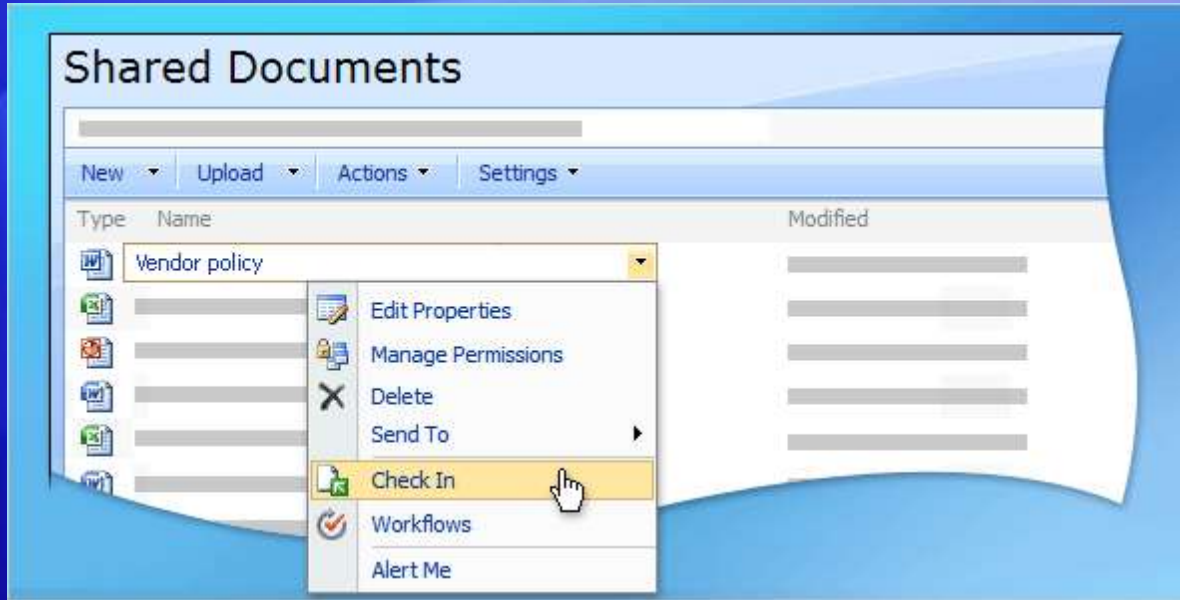


One thing for Windows Vista users to be aware of: If you try to select the **Use my local drafts folder** check box, you might see this error message.

If you trust the library you're working with (for example, if it's a library at your company and you trust the files that are stored there), you can add the SharePoint site URL to your list of trusted sites in Internet Explorer.

Doing so will eliminate this error message for the site.

# Another way to check in a file

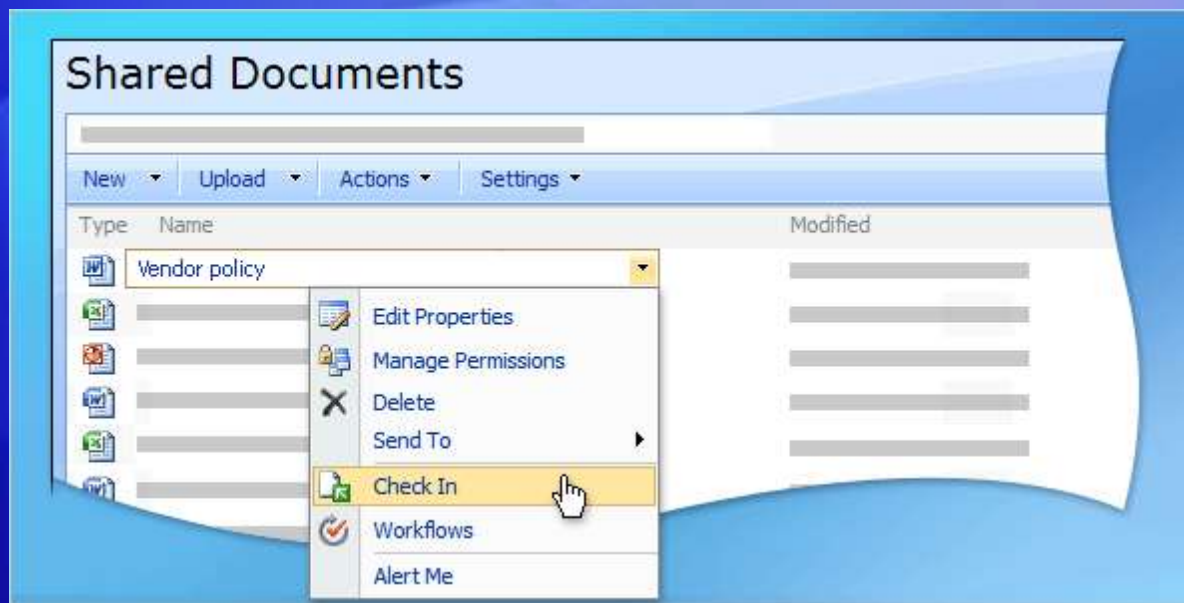


Being prompted to check in a file after closing it is convenient.

But if you checked out a file to your local drafts folder, and you don't have an Internet connection to your library, you won't be prompted to check in the file.

# Another way to check in a file

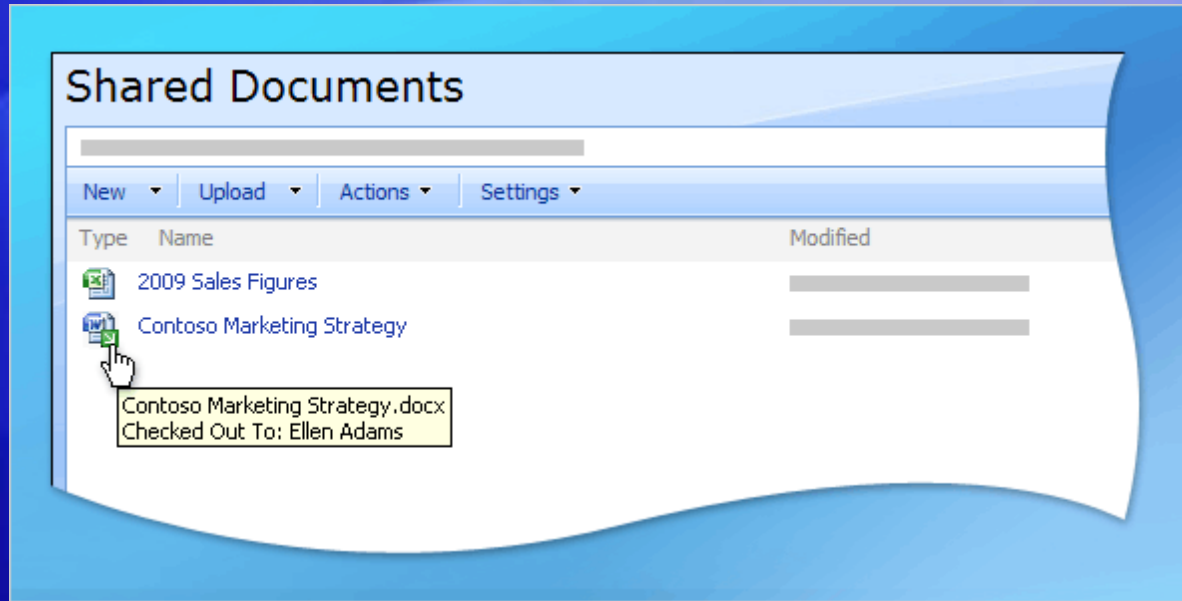
What do you do in that situation?



Easy: You check it in when you reestablish an Internet connection to your library, for example, when you get back to the office.

And you do that using your Web browser. Place your pointer over the file in the document library, click the down arrow that appears, and then click **Check In**.

# What other people see when a file is checked out



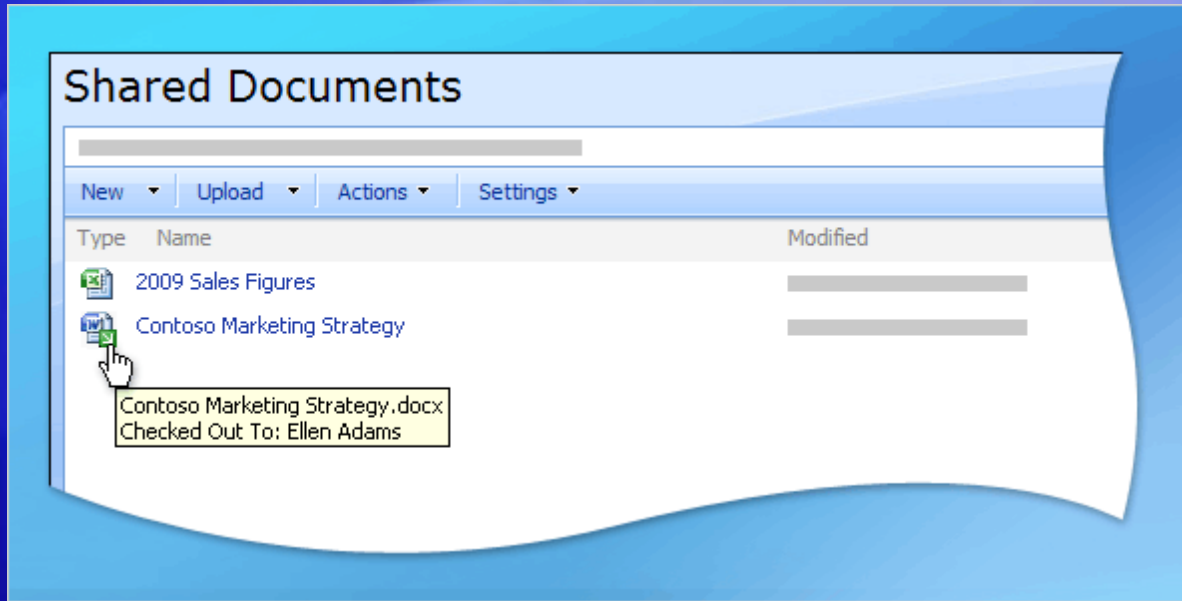
What do other people see when a file is checked out?

They see the checkout icon appear for the file, showing a green square with a white arrow.

In the picture, you can see that the **Contoso Marketing Strategy** file is checked out. If you rest your mouse over a checkout icon, you can see whom it is checked out to.

In this case, Ellen Adams has the file checked out.

# What other people see when a file is checked out



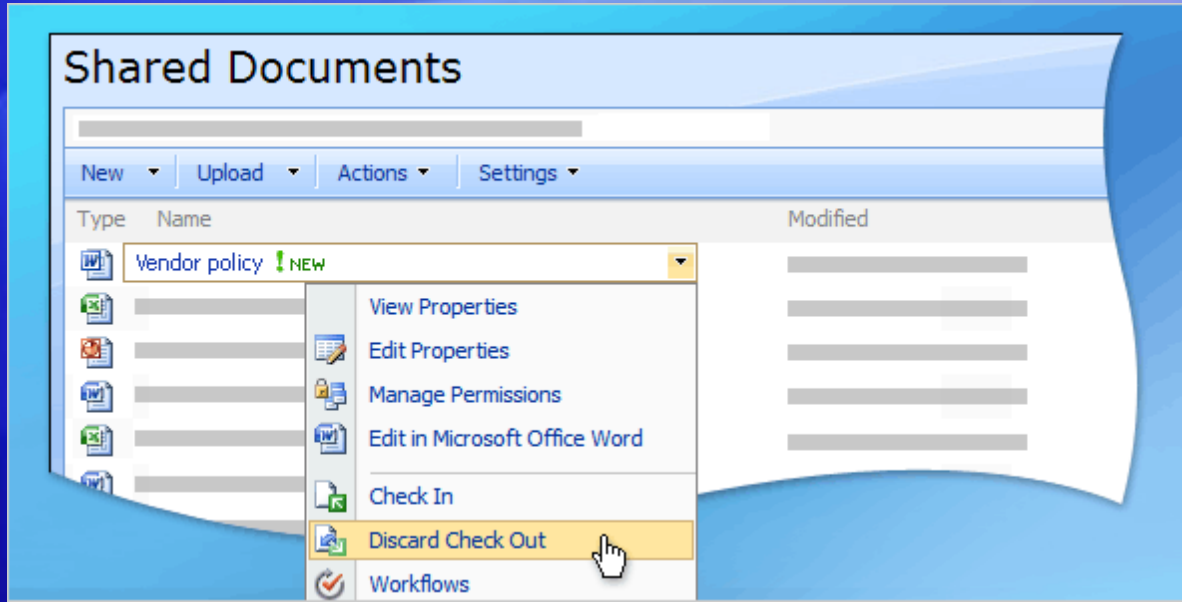
What do other people see when a file is checked out?

They see the checkout icon appear for the file, showing a green square with a white arrow.

What happens if people try to edit this file anyway? They will get the “File in Use” message explaining that the file is locked for editing by Ellen.

They can open it as read-only, but they will see the version of the file prior to the one Ellen is working on.

# When you change your mind

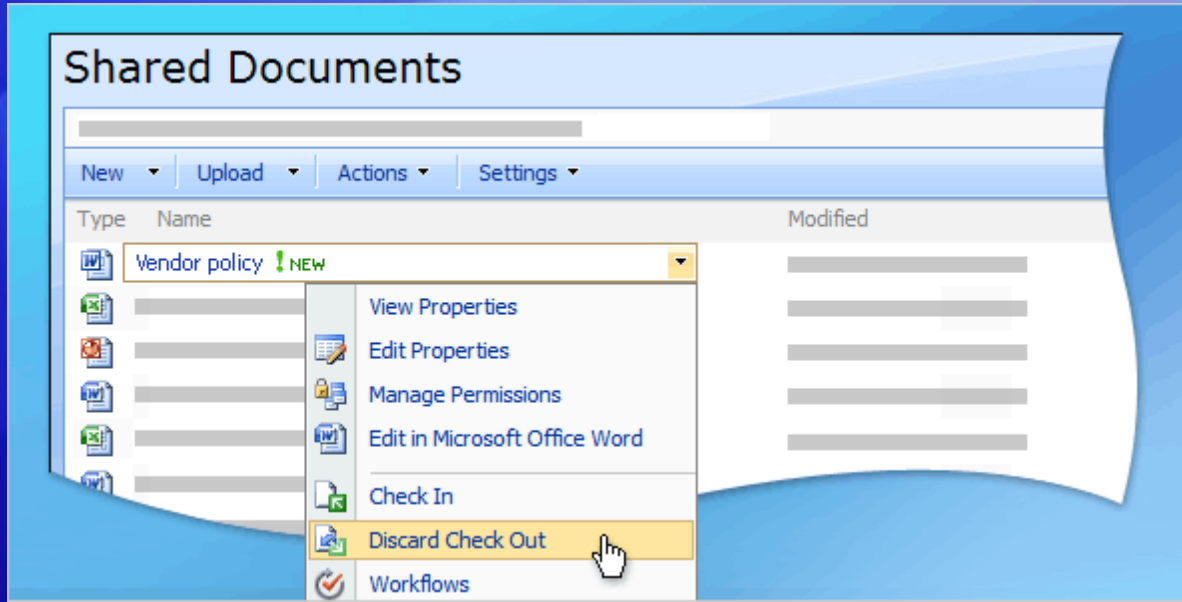


Imagine you check out a file and work on it for a little while. But then you start to think that your changes aren't as good as you originally thought.

So now you want the file to go back to the way it was before you checked it out.

That's easily done without having to undo all of your changes in the document.

# When you change your mind

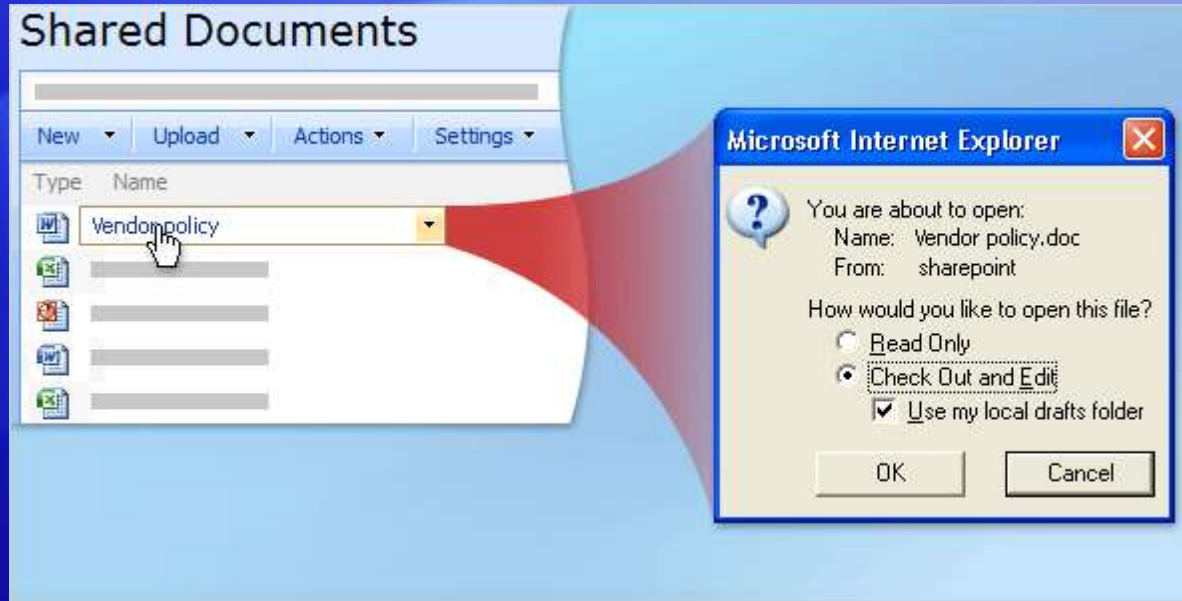


Imagine you check out a file and work on it for a little while. But then you start to think that your changes aren't as good as you originally thought.

How? You discard the checkout.

Just place your pointer over the file, click the down arrow that appears, and then click **Discard Check Out**. The file will change back to the way it was before you checked it out.

# Some libraries require checkout



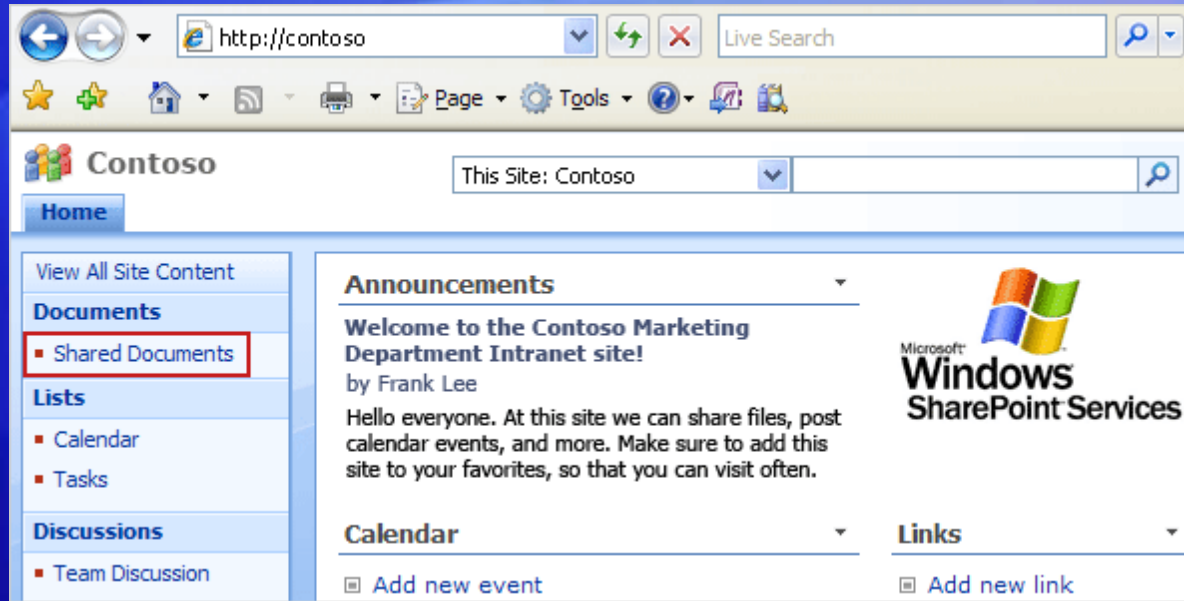
Sometimes people in charge of your site will set up a library so that it requires you to always check out your files.

How will you know this?

A subtle change happens when you try to edit the file. You'll see that the option to edit the file is changed to **Check Out and Edit**.

This setup is common at many organizations. In fact, your company might have libraries set up this way; you may have been checking out files without realizing it.

# Your version is important



This course covers how libraries work on Windows SharePoint Services 3.0 and Microsoft Office SharePoint Server 2007.

If you check out a file using a previous version, you may experience things differently.

How do you know which version you have? It's a common question. Just ask the person in charge of your site. If you are the person in charge, ask the person who set up your server.

# Test question 1

Which of the following represents a good reason to check out a file? (Pick one answer.)

1. You need to make a quick change to a file that will take five minutes or less.
2. You need to make a quick fix to a file that will take just five seconds.
3. You want to be sure that others can still change the document while you have it open.
4. You need to make a change to the file that will take more than 15 minutes.

# Test question 1: Answer

You need to make a change to the file that will take more than 15 minutes.

# Test question 2

Which of the following is one way to check in a file using Word 2007? (Pick one answer.)

1. Close the file.
2. On the **File** menu, click **Check In**.
3. Right-click the file in SharePoint Drafts, and then click **Check In** when prompted.
4. Double-click the file in the SharePoint Drafts folder.

# Test question 2: Answer

Close the file.

It's a simple matter of closing the file. Then you'll be prompted to check in the file. That is, if you have an Internet connection to the library.

# Test question 3

You're using Windows Vista, and you get an error message when checking out a file explaining that you can't use your local drafts folder. To eliminate this error message, you could add the site to which of the following? (Pick one answer.)

1. Your list of tertiary favourites.
2. Your list of trusted sites.
3. Your favourites or bookmarks, depending on the browser you are using.
4. Your SharePoint Drafts folder in Windows Vista.

# Test question 3: Answer

Your list of trusted sites.