

NCI Technologies presents:

Microsoft® Office  
SharePoint® Server 2007  
Training

**SharePoint document libraries IV:  
Tips and tricks**

# Course contents

- Overview: Here's a tip
- Lesson 1: Tips for working in your Web browser
- Lesson 2: Tips for working in Word, Excel, and PowerPoint 2007

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

# Overview: Here's a tip



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

Do you use document libraries to share files?

If so, this course, the fourth in a series on SharePoint document libraries, provides some handy tips for working in your browser and in 2007 Office system programs.

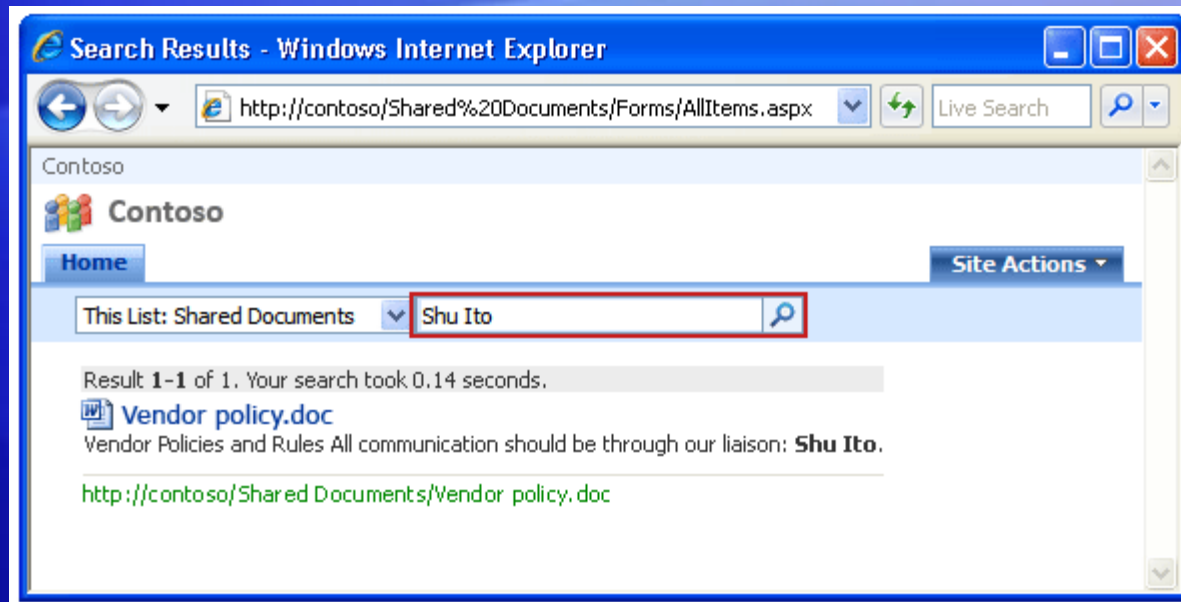
# Course goals

- Discover tips in your Web browser, such as how to sign up for e-mail alerts and how to move, rename, and delete files.
- Discover tips in Microsoft Office Word 2007, Excel<sup>®</sup> 2007, and PowerPoint<sup>®</sup> 2007, such as how to edit a file without starting your Web browser.

# Lesson 1

Tips for working in your Web  
browser

# Tips for working in your Web browser

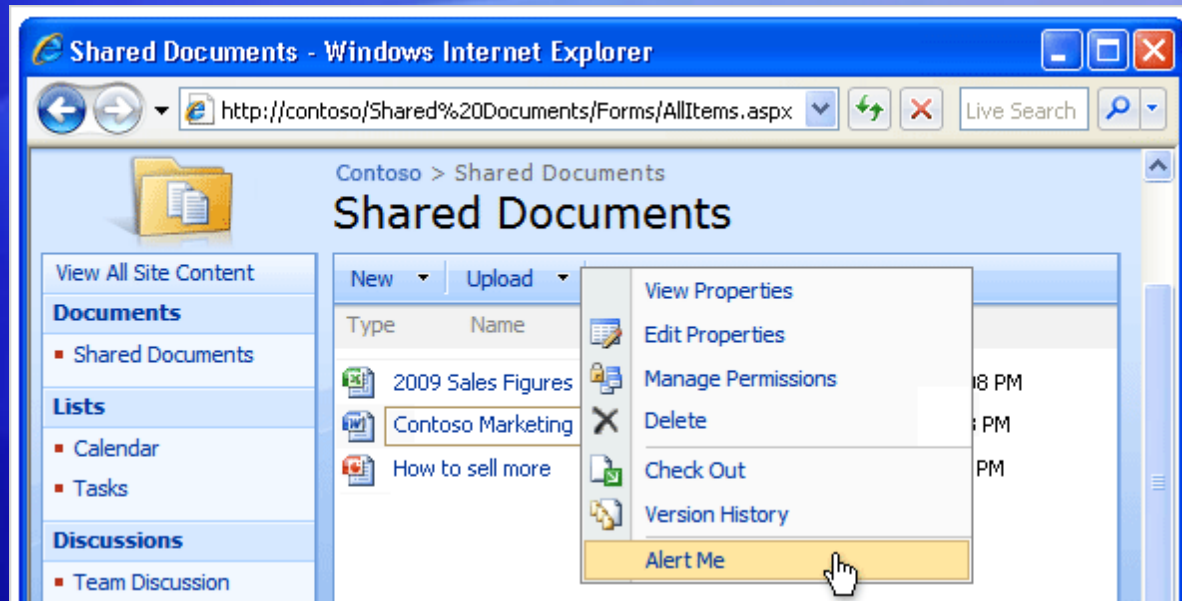


Here's a tip on finding files. Say you're working with a library and need a certain file that you know contains Shu Ito's name. You just can't remember which file.

It takes too much time to open each file one by one. A better way to find the file is to use the **Search** box.

Type your search keyword in the box, as shown here. You'll see a preview of the results. Then you can open the file you want.

# Get e-mail alerts for changes

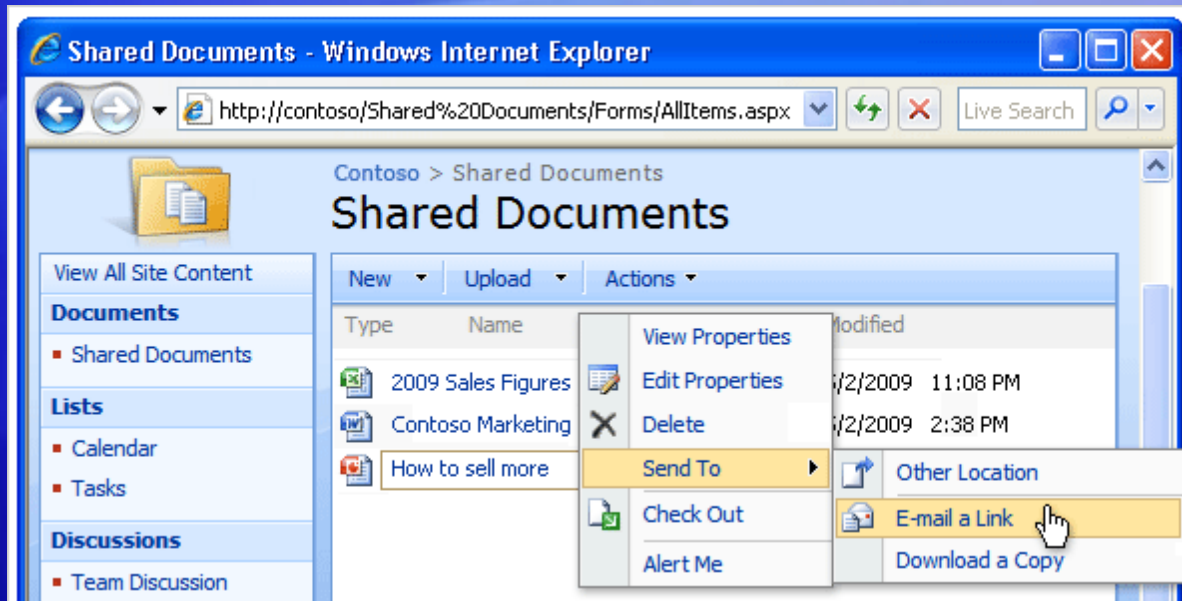


If you want to know when someone edits a file that you care about, sign up for an alert.

Then, when someone changes that file, the library will send you an e-mail message notifying you of the change.

To set up e-mail alerts for a file, place your pointer over the file, and click **Alert Me**, as shown here. You'll then set notification conditions, frequency, and other options.

# Send a link to a document library file

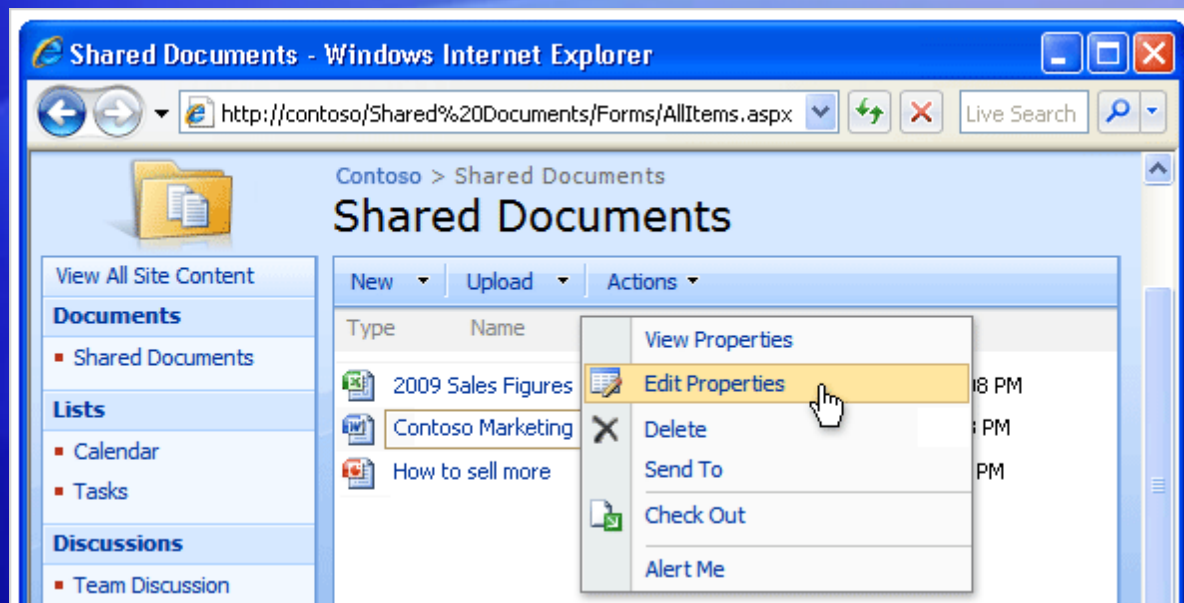


You need to tell someone about a new PowerPoint presentation that you added to your team's library.

You can send her an e-mail with a link to the presentation.

Place your pointer over the file, click **Send To**, and then click **E-mail a Link**, as the picture shows. A new e-mail message opens containing a link to the file.

# Rename document library files



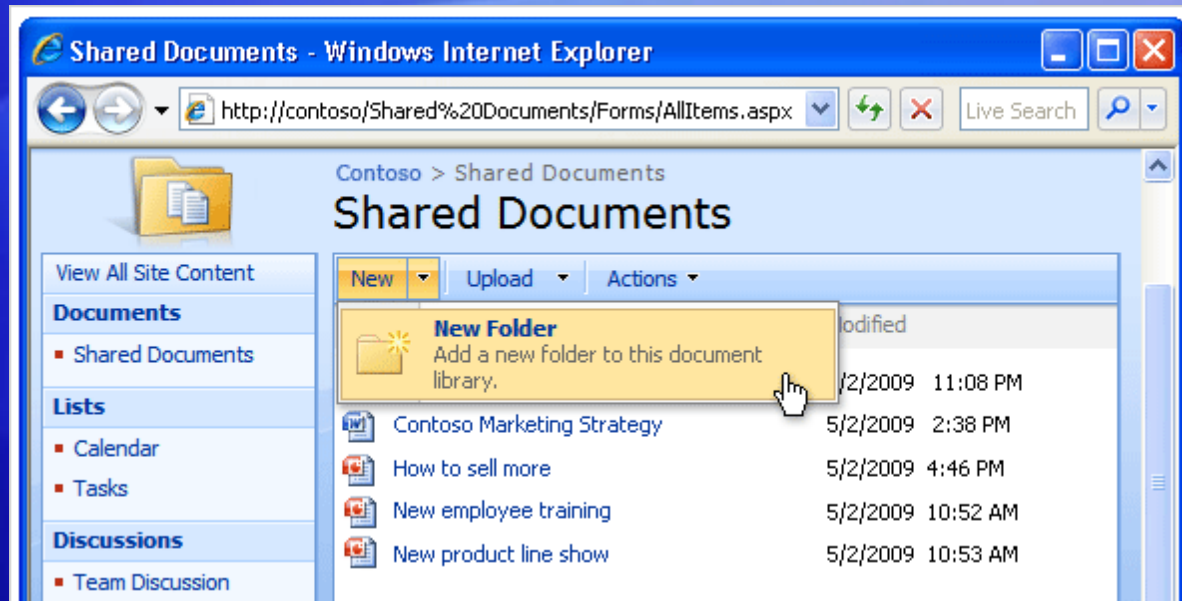
You're used to renaming files in Windows, right?

Well, it's likely that at some point you'll also need to rename files in a document library.

To do that, place your pointer over the file and click **Edit Properties**.

Then, in the **Name** box, rename the file as you need to.

# Create a document library folder



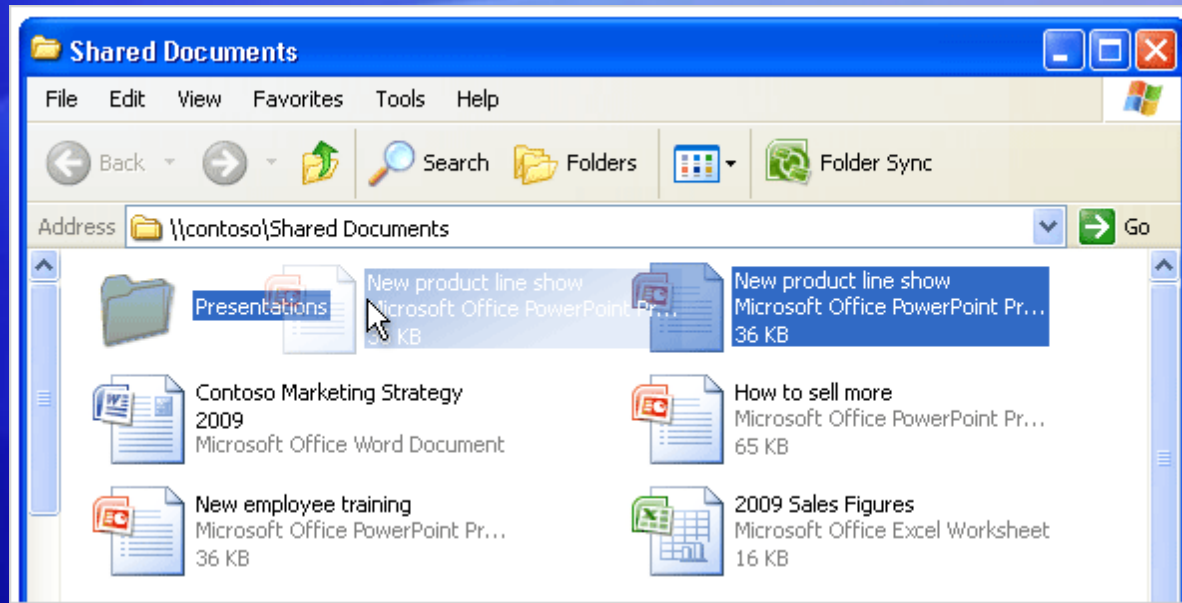
You'll also want to know about creating folders.

Doing so helps keep your library organised.

To create a new folder, use the **New** button.

Then click **New Folder**, and type a name for the folder. When you're done, the folder will appear in the document library.

# Use Windows Explorer to look at files

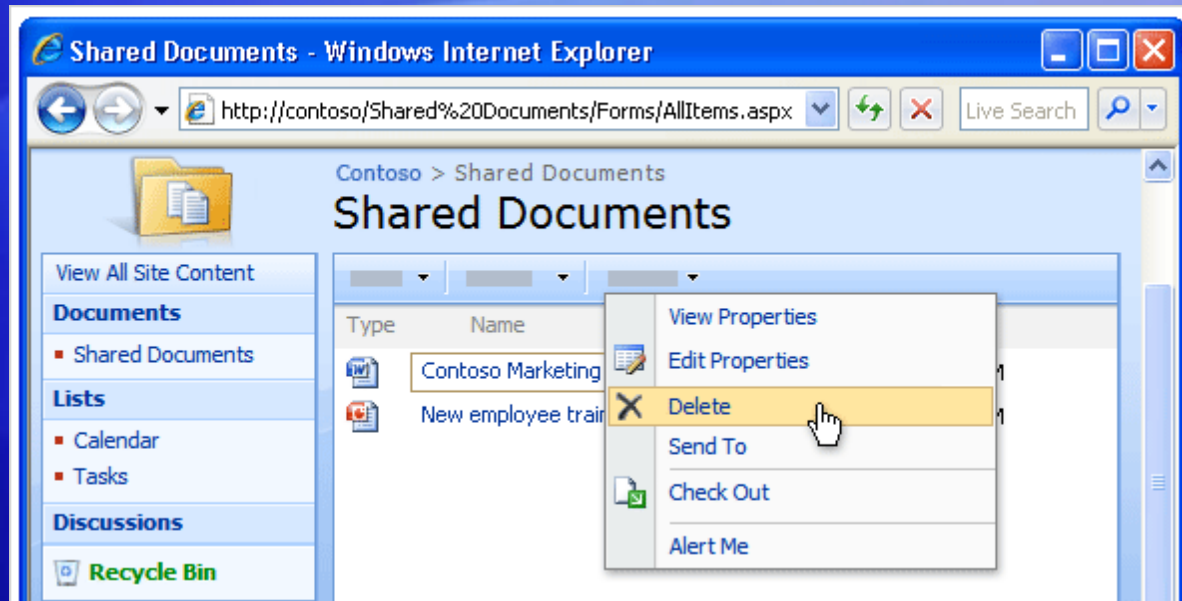


Working with files in a Web browser can be tedious. When you're doing a lot of file management, such as making folders and renaming files, you might crave the feeling of Windows Explorer.

You can get that feeling back even though you're working with a library in a Web browser. And more than that, this is also the one place where you can move files into other folders, as the picture shows.

Click **Open with Windows Explorer** on the **Actions** menu.

# Delete files, and then recover them



We've talked about how to make folders, rename files, and move them around. But how do you delete a file?

Place your pointer over the file, and then click **Delete** on the menu that pops up. This will put it in the **Recycle Bin**.

You can also restore a deleted file: in the **Recycle Bin**, select the check box next to the file, and then click **Restore Selection**.

# Test 1, question 1

How do you rename a file that is stored in a library? (Pick one answer.)

1. Click the **Microsoft Office Button**, click **Save As**, and then save with a different name.
2. Place your pointer over the file name, click the down arrow that appears, and then click **Edit Properties**.
3. Click the **Microsoft Office Button**, and click **Server**.
4. Place your pointer over the file name in the library, click the down arrow that appears, and then click **Rename**.

# Test 1, question 1: Answer

Place your pointer over the file name, click the down arrow that appears, and then click **Edit Properties**.

# Test 1, question 2

How do you delete a file that is stored in a library? (Pick one answer.)

1. Click the **Microsoft Office Button**, and click **Delete**.
2. Place your pointer over the file name, click the down arrow that appears, and then click **Send to Recycle Bin**.
3. Click the **Microsoft Office Button**, click **Server**, and then click **Send to Recycle Bin**.
4. Place your pointer over the file name in the library, click the down arrow that appears, and then click **Delete**.

# Test 1, question 2: Answer

Place your pointer over the file name in the library, click the down arrow that appears, and then click **Delete**.

You delete a file in the Web browser, not inside the program you use to edit it.

# Test 1, question 3

The only way to move a file from one folder to another is to use Windows Explorer. (Pick one answer.)

1. True.
2. False. You can also point over the file, click the down arrow, click **Send To**, and then click **Other Location**.

# Test 1, question 3: Answer

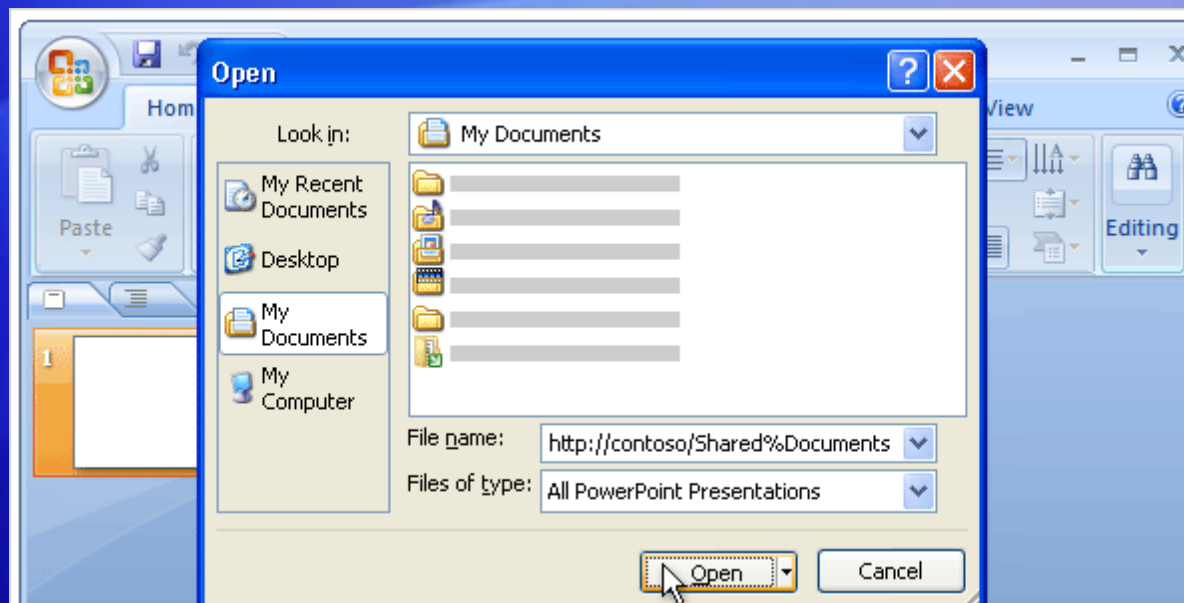
True.

Windows Explorer is the one place where you can move files. To use Windows Explorer, go to your library. On the **Actions** menu, click **Open with Windows Explorer**.

# Lesson 2

Tips for working in Word, Excel,  
and PowerPoint 2007

# Tips for working in Word, Excel, and PowerPoint

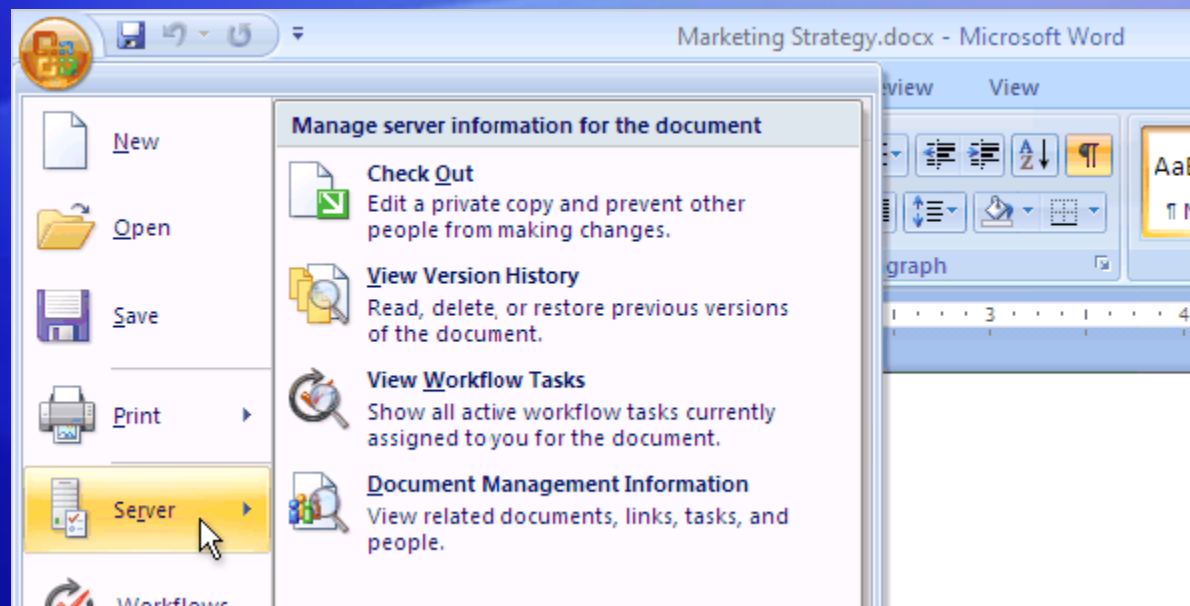


The first tip for working in these Office programs is how to edit a file without having to open your Web browser.

Click the **Microsoft Office Button** , and then click **Open**. Then you can locate and open files the same way you do for documents on your computer.

But instead of navigating to a folder on your computer, you can type the URL for your library.

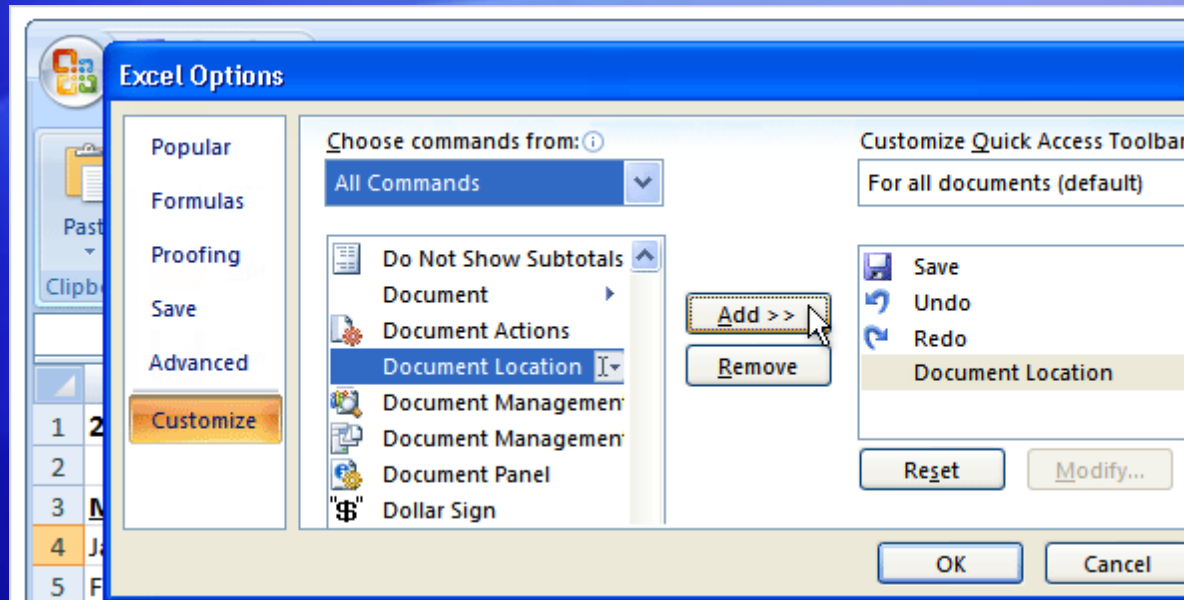
# Discover document library commands in your program



If you have a document library file open as read-only, and you need to check it out or check it in, you can do that without going to your Web browser.

Just click the **Microsoft Office Button** , click **Server**, and then you'll see the commands shown here.

# Always see where a file is located

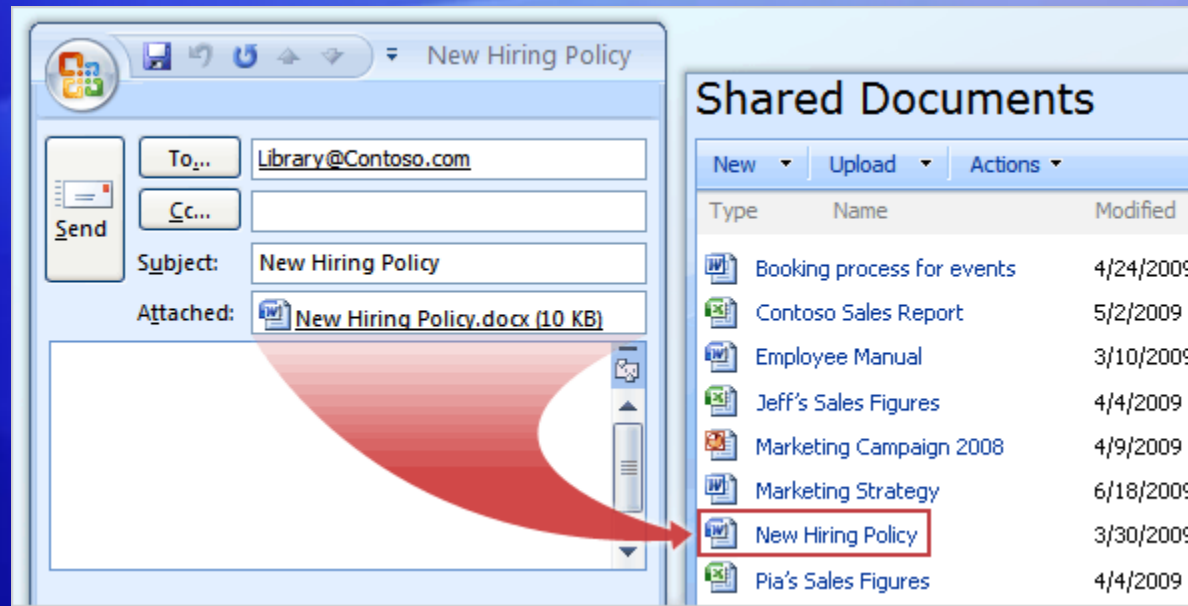


Can you tell which library this worksheet is in? No. But wouldn't that be helpful — especially if you work with more than one library?

To find out the location of a document, you can add the **Document Location** command to Word, Excel, and PowerPoint 2007.

You do this through each program's **Options** window. When you're done, the document's location will always appear at the top.

# E-mail a file to a library



Here's another great tip, although it's not limited to Word, Excel, or PowerPoint 2007.

This is a tip you can use with any e-mail program.

You attach a document to an e-mail message and send the e-mail message to a document library.

The attachment will automatically be added to the library, as shown here.

# Test 2, question 1

How can you open a library file using Word, Excel, or PowerPoint 2007? (Pick one answer.)

1. Click the **Microsoft Office Button**, click **Server**, and then click **Open**.
2. Click the **Microsoft Office Button**, and click **Server**. Click **My Network Places** on the left, and then double-click the library on the right.
3. Click the **Microsoft Office Button**, click **Open**, type the URL for your library, and then double-click the file you want.
4. Click the **Microsoft Office Button**, click **Open**, type the URL for your site, and then double-click the file you want.

# Test 2, question 1: Answer

Click the **Microsoft Office Button**, click **Open**, type the URL for your library, and then double-click the file you want.

And note that **My Network Places** is available on the left when you do this. Click it, and you'll see recent network places, including your SharePoint libraries.

# Test 2, question 2

How can you check out a file from within Word, Excel, or PowerPoint 2007? (Pick one answer.)

1. Click the **Microsoft Office Button**, click **Open**, type the URL for your library, and then right-click the file and choose **Check Out**.
2. Click the **Microsoft Office Button**, click **Server**, type the URL for your library, and then right-click the file and choose **Check Out**.
3. Click the **Microsoft Office Button**, click **Server**, and then click **Check Out**.
4. Click the **Microsoft Office Button**, click **Server**, and then click **Document Management**.

# Test 2, question 2: Answer

Click the **Microsoft Office Button**, click **Server**, and then click **Check Out**.

This is where you can access the Check Out command from within Word, Excel, or PowerPoint 2007.

# Test 2, question 3

To see the location of a SharePoint file, click the File menu, and then click Properties. It's easy to forget, but it's the only way. (Pick one answer.)

1. True.
2. False.

# Test 2, question 3: Answer

False.

You can add the **Document Location** command to the top of Word, Excel, or PowerPoint 2007.